User’s Guide

iPlanet Partner Agent for ECXpert Windows Client

Version 1.0 for Windows NT/98/95

806-4605-01
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Contents

About this Book

This handbook documents the conceptual, structural, and operational components of the iPlanet Partner Agent for ECXpert Windows Client for Windows NT or 95/98 . It also provides a description of the functionality and guidelines for administering the system.

The following topics are discussed in this section:

- Before You Begin
- The ECXpert Documentation Set
- Audience and Roles
- Organization
- Conventions Used in This Guide

Before You Begin

This Handbook is written with the assumption that you understand the basics of transferring files, the Internet, and the operating system on which you are running this software.

Downloading Updated Documentation

We continuously update ECXpert documentation. Follow these steps to:

- Determine whether you have the latest version of any ECXpert document
- Download a copy of any ECXpert document

NOTE	In these instructions, the environment variable *$NSBASE* is the full path to the Netscape ECXpert installation directory.

1. Obtain a user ID and password for ProductTracker by SubscribNet.

   If you do not know where to start, display the ProductTracker by SubscribNet home page at the URL below:

   http://home.netscape.com/support/producttracker/index.html

   The information provided on this page should let you determine the contact person at your company who can provide you with the user ID and password. If that person is you, and you have not received this information, call the iPlanet Customer Support phone number that is provided.

2. Display the ProductTracker by SubscribNet web page.

   The URL is...
   http://subscribnet.netscape.com/

3. Enter your Subscribnet user ID and password.

   The main Subscribnet page is displayed.

4. Click the link in “Click here to access your software.”

   An index of the Netscape and iPlanet software registered for your user ID is displayed.

5. Click the “iPlanet ECXpert” link.

   A page is displayed that asks you to select the version and platform.

6. Locate the link for your version, platform, and domestic vs. export combination.

   First locate Version 1.0, and then find Solaris, for Export or Domestic (US/CAN) sale, as appropriate.

7. Click the link you have located.

   A list of all the downloads available for ECXpert 1.0 for Solaris, including documentation, is displayed.

8. Locate the title in the ECXpert document set that you want.

9. Compare dates.

   Compare the date for that title with the date in the footers in your copy of the same document.

   If these dates are the same, you already have the latest version of the documentation.

10. If your documentation is outdated, click the download link.

    If the date in the footers of the documentation you have is earlier than the date for the same document on the screen, you should download the updated version.

Suggested Supplementary Reading

The following documents may be helpful as supplements to this handbook:

- The *iPlanet Partner Agent for ECXpert Server Administrator's Handbook*, for information about administering the Partner Agent Server
- For ECXpert technical support, always visit the iPlanet Online Support website at http://www.iplanet.com/support/online
- Your operating system manuals, particularly any pertaining to system security

The ECXpert Documentation Set

You may wish to refer to other ECXpert books for additional information. This section discusses each book in the ECXpert documentation set.

Release Note

After you receive the ECXpert 3.5 software, before you do anything else, you should download the *ECXpert 3.5 Release Note*. See the *ECXpert Getting Started Guide* (for the operating system that applies to you) for instructions on downloading the latest release note.

The Release Note contains:

- A list of bugs fixed in the current release
- A list of all documentation corrections
- Warnings and workarounds for known problems
- Additional important information you should know before you install or use ECXpert

The *Release Note* is platform-specific, so make sure you have the right version for the platform you're using.

Getting Started Guide

The *ECXpert Getting Started Guide* is the book you use to install ECXpert. It includes preinstallation tasks—including basic instructions for installing or upgrading to the required version of Oracle—ECXpert installation steps, and information on additional tasks you may wish to perform after you install ECXpert. The *Getting Started Guide* is platform-specific, so make sure you have the right version for the platform you're using.

Administrator's Handbook

The *ECXpert Administrator's Handbook* is written for the ECXpert System's administrator. This book provides an overview of the ECXpert system and uses specific examples, or "scenarios," to illustrate the different ways in which ECXpert can be used most effectively in a wide variety of different business situations. It also covers the ECXpert Server Administrative Interface in depth, discusses the ECXpert command line utilities, and explains how to integrate ECXpert with SAP and MQSeries.

Developer's Handbook

The *ECXpert Developer Handbook* book is written for C++ developers who want to customize ECXpert. It primarily documents the ECXpert APIs which give C++ applications full access to the database. This includes detailed documentation of each class, each method in each class, and code examples. It also documents the complete database schema.

Operations Reference Manual

If you ever have difficulty using ECXpert, the *ECXpert Operations Reference Manual* more than likely documents a quick resolution. This book contains basic troubleshooting guidelines for ECXpert, other Netscape products, and third-party products. It also includes a complete error message reference.

Audience and Roles

This handbook is written for Partner Agent Windows Client users. All documentation needed by Partner Agent's administrator is supplied in the *iPlanet Partner Agent for ECXpert Server Administrator's Handbook*.

Organization

This handbook is structured as follows:

Chapter 1: Introducing iPlanet Partner Agent for ECXpert Windows Client Software

This chapter introduces the iPlanet Partner Agent for ECXpert family of applications and describes the major features and concepts of the Partner Agent.

Chapter 2: Installing iPlanet Partner Agent for ECXpert Windows Client Software

This chapter describes how to install and uninstall Partner Agent.

Chapter 3: Using the Client Interface and Screens

This chapter describes the interface and controls and how to access the various screens.

Chapter 4: Transferring Files

This chapter explains how to transfer files and folders with Partner Agent Client, including how to schedule transfers.

Index

The index lists important terms and page numbers where information about those terms appears in the text.

Conventions Used in This Guide

Actions

Clicking the right mouse button is called right-clicking. A menu that appears when you right click is called the right mouse menu. Instructions for selecting an item from the right-mouse menu are documented like this:

- Right-click on the Partner Agent icon in the Windows system tray. This is usually in the lower right corner of your screen
- From the right-mouse menu, select Manager.

Menus and sub-menus are represented with the side carat, (>). Where appropriate, menu items are underlined and capitalized as they appear on the screen. For example, to start Partner Agent you click on the Start menu and select the Programs sub-menu, and from that sub-menu you select the PartnerAgent sub-menu, and from that sub-menu select PartnerAgent. This is documented like this:

From the Start menu select Programs > PartnerAgent > PartnerAgent.

Typographic Conventions

A number of typographic conventions are used throughout this manual to help you recognize special terms and instructions. These conventions are summarized in the table below.

Convention	Meaning	Example
numbered steps	higher level descriptions of tasks you perform (more detailed instructions follow)	**1.** Enter the group information. Enter the name in the Group Name field, and a short description in the Description field.
italics	key words, such as terms that are defined in the text	The notices posted on an electronic BBS are called *articles*.
	names of books	For more information, refer to the *ECXpert Getting Started Guide*.
	variables	**`usrlogin=`***login*
	In command syntax, items in italics are *not* literals.	You must substitute valid values for italicized items.
courier font	file names	The associated data is stored in the Dispatcher section of the `bdg.ini` file.
	text file content (HTML templates, config files)	`<TITLE>Password Check</TITLE>` `<IMG SRC="/ui/icons/hd_svcs.gif">`
	code samples and command line output	**Syntax** `const char* getName() const`
courier bold	command line input, to be entered by the user	Enter the following command: **`ls *.mle`**
# or `fdx>`	command line prompt	fdx>**`sslmode tun`**

Convention	Meaning	Example
square brackets, [...]	In command syntax, items within square brackets are *optional*.	In the following example: `nsusrgrp` [-v] insert [-l] -k *key arguments* -r act=*relation action*, usrid=*ID* | usrlogin=*login*
vertical line (|)	In command syntax, items on either side are valid *alternatives*.	-*v* and -*l* are optional. You may specify either *usrid* or *usrlogin*. You must substitute valid values for italicized items.
em dash (—)	"none" or "nothing"	Arguments —

Chapter 1

Introducing iPlanet Partner Agent for ECXpert Windows Client Software

This chapter gives some background on the iPlanet Partner Agent for ECXpert client/server system and the features of the Partner Agent Windows Client in particular.

The following topics are discussed in this section:

- The Partner Agent for ECXpert Client/Server System
- Partner Agent Client Features and Benefits

The Partner Agent for ECXpert Client/Server System

Partner Agent for ECXpert is a client/server solution for secure file transfer and automated document processing. Partner Agent products work with the ECXpert system to provide high performance file transfer capabilities as well as state of the art security, reliability, and automation. Partner Agent is fully compatible with FTP and HTTP(S) standards.

Partner Agent is made up of the Partner Agent Server and the Partner Agent Client. Partner Agent Server is integrated with ECXpert, turning ECXpert into a secure file transfer site. Partner Agent Client runs as a stand-alone application that turns your PC into a powerful, secure, and reliable download and upload manager for exchanging files with ECXpert, as well as with other machines.

Partner Agent allows Client users to exchange files directly with ECXpert. Partner Agent uses the ECXpert submit utility to upload files from the Client to ECXpert, where they are processed further as required. It uses the ECXpert poll utility to retrieve files downloaded from ECXpert; these files can be viewed and processed using the Client.

Partner Agent is scalable, making it an ideal building block for industrial-strength extranet applications.

Partner Agent Server

Partner Agent for ECXpert Server is a customized, pre-configured system that allows you to turn ECXpert into a secure file transfer site.

In addition to integrating state-of-the-art security standards, such as Secure Socket Layer (SSL) and digital certificates (X.509), Partner Agent contains a sophisticated access control system as well as EnGuard™ security auditing software that automatically warns of potential security issues.

Partner Agent also guarantees Extranet data delivery and data integrity while protecting corporate bandwidth.

Partner Agent's functionality is extended through a plug-in architecture that uses *ActiveAgents*. ActiveAgents are transactional software agents that call ECXpert APIs to initiate events based on file transfers and to also feed information into back-end applications, such as databases, enterprise scheduling software, and network printing operations. ActiveAgents also make it easy to add third-party functionality to Partner Agent, such as virus scanning, file format conversion, or additional security mechanisms as required.

Partner Agent Server comes with a browser-based administration system, which can optionally be used to reconfigure the Server in special circumstances; it is not needed in most cases since the Server is already preconfigured for optimal, secure performance with ECXpert. It also comes with a secure command line client, which can optionally be used for testing the system.

Partner Agent Client

Partner Agent Client software for Windows 98/95 and NT provides high-performance, reliable, and secure file transfer of critical business documents between your Windows desktop and ECXpert or other machines—over your intranet, business extranet, or the Internet.

You can also use a standard browser as a client for file transfers to non-ECXpert machines.

Partner Agent Client Features and Benefits

The Partner Agent Windows Client has all of the standard features of regular FTP and more. The Windows Client offers the following additional features to a typical file transfer:

- Partner Agent provides unparalleled reliability when transferring large files (100Mb - 4Gb) over unreliable network connections, dial-up connections, overloaded servers, or the Internet. You can restart a file transfer if the connection is interrupted or the transfer is terminated for some reason.
- FTP file transfers to ECXpert.
- FTP, HTTP, or HTTPS file transfers to non-ECXpert machines.
- SSL.
- Security through encryption of all communications.
- Supports X.509 certificates for authentication of client and server identities.
- Supports Tunnel Mode, which is a firewall-friendly mode that allows you to connect securely through a firewall or proxy server.
- MD5 checksums of local and remote files.
- Supports mirrored server locations.

- Provides highly reliable, high performance, and secure transfer of large files over the Internet or private network when accessing a Partner Agent Server.
- Client-side APIs allow the output of the server-side ActiveAgents, such as the ECXpert tracking ID of submitted and retrieved files, to be displayed in the user interface.

Table 1-1 Partner Agent Client features and benefits

Features	Benefits
Supercharged File Transfer	
• Secure and reliable downloading and uploading of very large files. • Adds high performance file transfer capabilities to your Web browser. • Secure server. • Complete system customability and tensibility through ActiveAgents APIs. • Compatible with FTP and HTTP protocols.	• Allows customers to design, deploy, and access a new generation of network-accessible business services, online software distribution systems, digital rights management systems and business-to-business commerce.
Rapid Resume	
• Automatically restarts transfers if network connection fails. • Restart transfers from where the last transfer left off. • Allows you to pause and resume file transfers. • Schedules file uploads and downloads for unattended transfer in one time or recurring fashions. • Automatically rolls-over to alternate Partner Agent mirrored servers. • Keeps a log of file tranfers.	• Reliable high-performance transfer of large documents over unreliable network connections. • Provides guaranteed “Fed-like” delivery of any number or size of files (documents, graphics, software, etc.), along with flexibility on scheduling automatic file uploads and downloads. • Automatically accesses alternate mirrored Partner Agent servers in case of a failed connection.

Table 1-1 Partner Agent Client features and benefits *(Continued)*

Features	Benefits
Built-In Full System Security	
• Secure Sockets Layer (SSL) encryption, client and server. • Support for X.509 digital certificates. • Name and password support. • Partner Agent server has extensive security features.	• Provides a range of security options for ensuring that files, IDs and passwords are transferred securely. • Partner Agent Server provides a complete suite of access controls and security monitoring systems to ensure server security.
ActiveAgents	
• Client and server-side Application Programming Interfaces (API). • Automatically generate content processing based on client file requests. • Automatic post-processing of transferred files.	• Allows the functionality of Partner Agent to be easily extended by defining processes that take place on files coming or going from the client or server. (For example, automatically send notices on database changes, virus scan incoming data before accepted, serial number stamping, preload a file into a database).
Easy to use	
• Drag-and-drop interface. • Client runs as a standalone application and as a Netscape Navigator protocol handler.	• Makes the process of transferring files easy and intuitive. • Seamlessly supercharges the file transfer functionality of your Netscape Navigator browser.
Cross-Platform	
• Windows 98/95/NT Client. • UNIX command-line client. • Netscape Navigator support (versions 2.0 and up). • Microsoft Internet Explorer 4.0. • Microsoft Internet Explorer 3.0 via drag-and-drop links from your browser to Partner Agent. *Note:* Internet Explorer has a bug that prevents third parties from directly enhancing its file transfer capabilities. Microsoft has fixed this bug for Internet Explorer 4.0.	• Allows customers to deploy Partner Agent on the industry-leading hardware and software platforms across the organization.

Table 1-1 Partner Agent Client features and benefits *(Continued)*

Features	Benefits
Based on Industry Standards	
• TCP/IP • FTP • HTTP • SSL • HTML	• Allows seamless integration of Partner Agent into your intranet or Extranet.

Chapter 2

Installing iPlanet Partner Agent for ECXpert Windows Client Software

This chapter describes how to install and uninstall Partner Agent Windows Client.

The following topics are discussed in this section:

- Installing Partner Agent Windows Client
- Setup for Authentication Using VeriSign Class 1 Certificates
- Uninstalling Partner Agent Windows Client

Installing Partner Agent Windows Client

Follow the steps below to install the Partner Agent for ECXpert Win32 Client on any Windows NT/98/95 machine.

1. Log on as administrator to a Windows NT/98/95 machine.
2. Download the Partner Agent Client installation file.
   a. Display the iPlanet Downloads web page.

      The URL is
      http://iplanet.com/downloads/testdrive/index.html

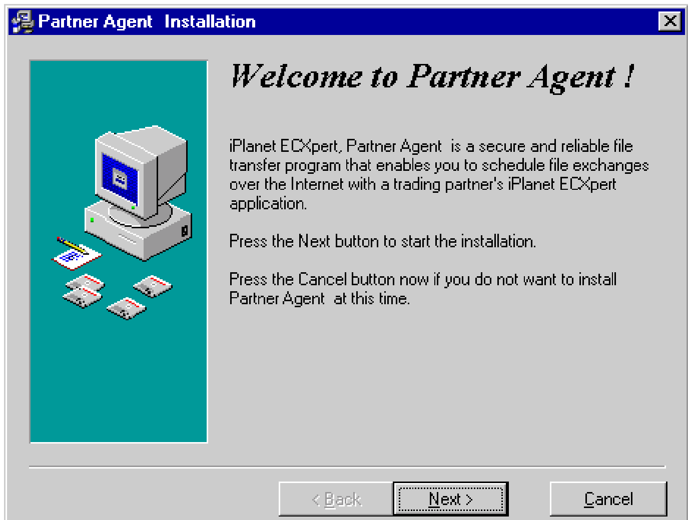
      An index of the iPlanet software available for download is displayed.
   b. Locate the Partner Agent for ECXpert Windows Client link and click it.

      A page is displayed that asks you to select the version and platform.
   c. Locate the version and platform available for download—for either Domestic or Export customers, as appropriate—and click the download link.
3. If you are not previously registered for iPlanet downloads, fill out the registration form.
4. Accept the license agreement.

   The file will be downloaded to your machine.
5. Open the directory in which the Partner Agent Windows Client was downloaded and double-click on the Install icon.

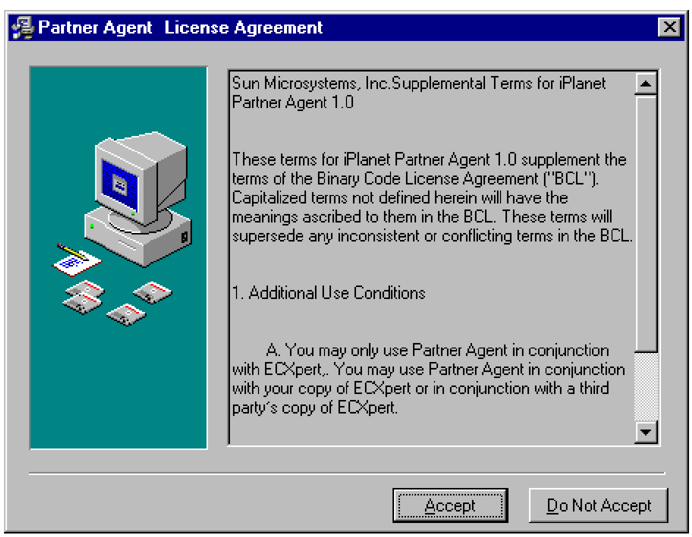
6. Click Next to begin the installation.

Figure 2-1 Partner Agent Installer Step One



7. Click Accept to accept the end user license agreement.

Figure 2-2 Partner Agent Installer Step Two



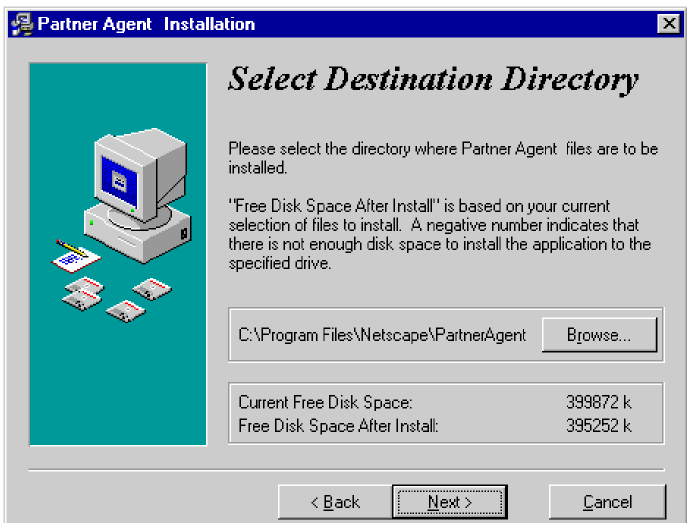
8. Select the destination directory.

The Partner Agent for ECXpert client is installed immediately below the directory specified here.

a. Click Browse if you want to select a different destination directory. Make sure that the directory you want appears in the destination directory box before you continue.

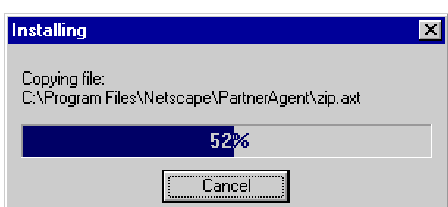
b. Click Next to continue.

Figure 2-3 Partner Agent Installer Step Three



As you begin copying files to the new installation directories, a window similar to that in Figure 2-4 will appear.

Figure 2-4 Partner Agent Installer Step Four



9. Restart your machine after installation is complete.

Setup for Authentication Using VeriSign Class 1 Certificates

To allow the Partner Agent Client to authenticate itself to the Partner Agent Server using a VeriSign Class 1 certificate, follow these steps:

1. Log on as administrator to the Windows Client machine.

1. Open a Command Prompt window.

2. Convert your private key from pkcs12 format to pem format.

   Enter the following command to use the pkcs12 utility packaged with Partner Agent:

<client_directory>`\pkcs12 -in` *<certfilename>* `-nocerts -out` *<certfilename>*`-key.pem`

   where *<client_directory>* is the directory in which the Partner Agent Client application is installed.

3. Convert your certificate from pkcs12 format to pem format.

   Enter the following command to use the pkcs12 utility packaged with Partner Agent:

<client_directory>`\pkcs12 -in` *<certfilename>* `-clcerts -nokeys -out` *<certfilename>*`-crt.pem`

   where *<client_directory>* is the directory in which the Partner Agent Client application is installed.

4. Specify the certificate and public key in the Client preferences.

   a. Open the Manager interface, Edit, Preferences/Security tab.

   b. Specify the Certificate File by entering a path or using the Browse button to select a file.

   c. Specify the Key File by entering a path or using the Browse button to select a file.

   d. Click OK.

Uninstalling Partner Agent Windows Client

Once Partner Agent Client has been installed, you can uninstall it. If you installed Partner Agent Client in the default directory:

- From the Start menu, select Programs > PartnerAgent > Uninstall PartnerAgent.

NOTE	If you installed Partner Agent in any other folders, substitute the appropriate folders.

Partner Agent Client is uninstalled.

Chapter 3

Using the Client Interface and Screens

This chapter describes how to start Partner Agent Windows Client. It also describes the interface and controls and how to access the various screens.

The following topics are discussed in this section:

- Starting Partner Agent Windows Client
- Exiting Partner Agent Windows Client
- User Interface
- Manager Screen
- Profiles—New Explore Screen
- Progress Screen
- Preferences Screen

Starting Partner Agent Windows Client

To start the Client, use the Start Menu.

NOTE	If you have the preference set to launch Partner Agent at startup, Partner Agent may be running.

If you installed Partner Agent Client in the default directory:

- From the **Start** menu select Programs > PartnerAgent > PartnerAgent.

NOTE	If you installed Partner Agent in any other folders, substitute the appropriate folders.

A small icon will be displayed in the system tray of the Windows task bar, usually in the lower right corner of your screen (Figure 3-1).

Figure 3-1 Partner Agent icon in Windows system tray

Exiting Partner Agent Windows Client

To exit the Client:

- Right-mouse click on the Partner Agent icon in the Windows system tray.
- From the right-mouse menu, select Exit.

User Interface

The controls for Partner Agent Client are accessed through the buttons and menus in several different graphical user interface (GUI) screens. They are the Explore, Progress, Manager, and Preferences screens.

Manager Screen

The main screen for accessing the Client controls is the Manager screen. To access the Manager screen:

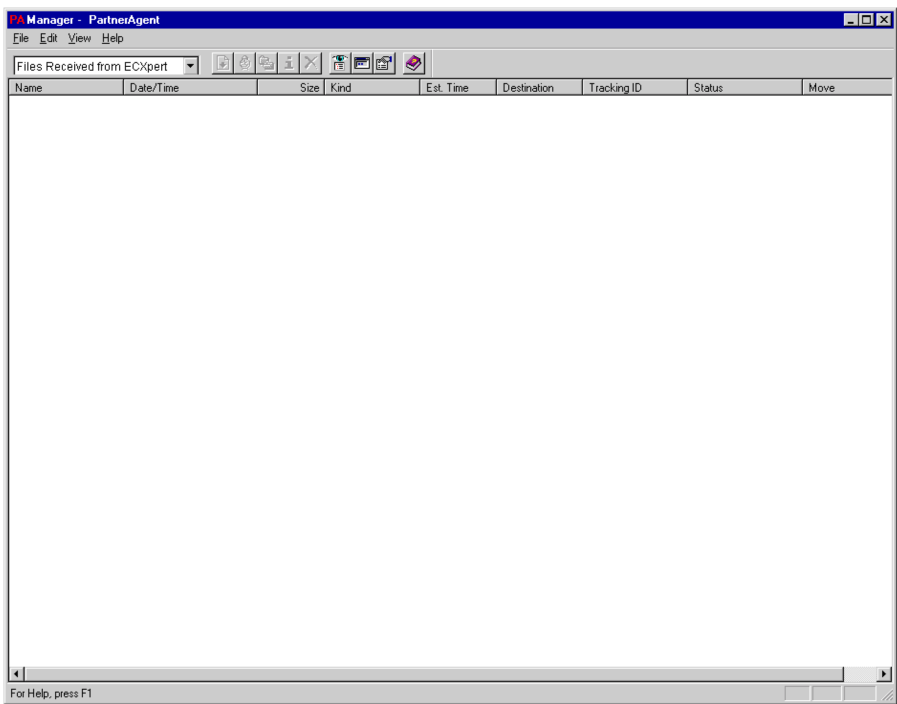
- Double-click on the Partner Agent icon in the lower right-hand corner of the screen.

  OR

- Right-mouse click on the Partner Agent icon.
- From the right-mouse menu, select Manager.

The Manager screen displays (Figure 3-2), and a Partner Agent button appears in the Windows task bar at the bottom of the screen.

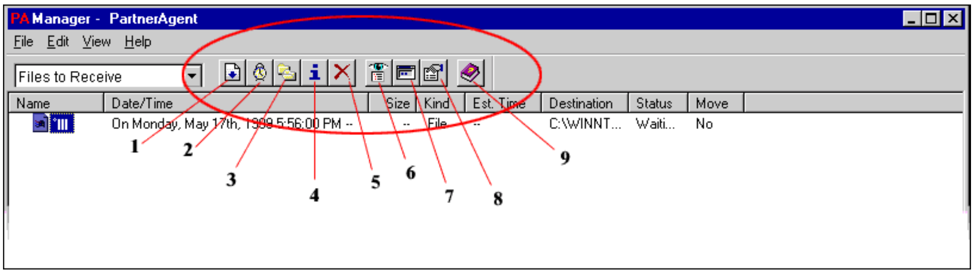
Figure 3-2 Manager screen



Manager Toolbar

The Partner Agent Manager toolbar, at the top of the Manager screen, has nine buttons to simplify sending and receiving files. Refer to Figure 3-3 to identify each button with its name and function.

Figure 3-3 Manager screen toolbar



1. Transfer Now—Starts transfer of any selected entries.
2. Schedule—Opens a window so you can set a specific time for a transfer to occur.
3. Change Destination—Opens a Save As window so you can set the download directory for the selected entries and, if desired, change the name.
4. Information—Opens the transfer log screen for the selected items.
5. Remove—Deletes any selected files from the transfer list.
6. Explore—Opens the Profiles - New Explore screen to allow you to search for files or to create profiles.
7. Progress—Displays the Progress screen, which gives you the status of any files being transferred.
8. Preferences—Displays the Preferences screen to configure Partner Agent for your environment and other preferred settings.
9. Quick Help—Launches the online help system for Partner Agent Client.

View Options

The Manager displays one of eight different views, depending on what is selected in the first drop-down list. Use the drop-down list to select one of these options:

- Files to Receive—The Manager displays a list of files that are being received or scheduled to be received from a machine other than ECXpert.

  To display a list of files that are being received or scheduled to be received *from ECXpert*, use the Files to Be Received from ECXpert option.

- Files to Send—The Manager displays a list of files that are being sent or scheduled to be sent to a machine other than ECXpert.

  To display a list of files that are being sent or scheduled to be sent *to ECXpert*, use the Files to Submit to ECXpert option.

- Files Received—The Manager displays a list of files that have been received from a machine other than ECXpert.

  To display a list of files that have been received *from ECXpert*, use the Files Received from ECXpert option.

- Files Sent—The Manager displays a list of files that have been sent to a machine other than ECXpert.

  To display a list of files that have been sent *to ECXpert*, use the Files Submitted to ECXpert option.

- Files to Submit to ECXpert—The Manager displays a list of files that are being sent or scheduled to be sent to ECXpert.

  To display a list of files that are being sent or scheduled to be sent to a machine *other than ECXpert*, use the Files to Send option.

- Files Submitted to ECXpert—The Manager displays a list of files that have been sent to ECXpert.

  To display a list of files that have been sent to a machine *other than ECXpert*, use the Files Sent option.

- Files to Be Received from ECXpert—The Manager displays a list of files that are being received or scheduled to be received from ECXpert.

  To display a list of files that are being received or scheduled to be received from a machine *other than ECXpert*, use the Files to Receive option.

- Files Received from ECXPert—The Manager displays a list of files that have been received from ECXpert.

  To display a list of files that have been received from a machine *other than ECXpert*, use the Files Received option.

Menu Options

The following options are available from the menus in the Manager screen.

File Menu

The following options are available in the File menu of the Manager screen.

- Explore—Opens an Explore Profiles window which allows you to add, modify, and delete user profiles for file transfers.
- Open URL—Opens a window in which you can enter a fully qualified “http,” “ftp,” “gxp,” “ftpu,” or “gxpu” URL. For example, to send files, type:

  `ftpu://user:password@host/pathname`

  A Send Files window displays for you to select the files to send.

  To explore a site, enter a pathname that ends in a forward slash (`/`). An Explore screen displays.
- Send Files—Opens a window in which you can enter the address of a server *other than ECXpert* (such as *ftp.YourCompany.com* or *205.115.164.123*), the port number (for FTP the default is 21), the user name (leave blank for anonymous), the password (leave blank for anonymous), and the path name on the server to send the files. This window is similar to entering an “ftpu” link.
- Receive Files—Opens a window in which you can enter the address of a server *other than ECXpert* (such as *ftp.YourCompany.com* or *205.115.164.123*), the port number (for FTP the default is 21), the user name (leave blank for anonymous), the password (leave blank for anonymous), and the path name on the server to send the files. This window is similar to entering an “ftpu” link.

- Submit Files to ECXpert—Opens a window in which you can enter the ECXpert host address (such as *ftp.YourCompany.com* or *205.115.164.123*) and port number (for FTP the default is 21), the login name and password, the sender name and password (must be a valid ECXpert member), the receiver name (must be a valid ECXpert member name), and the ECXpert document type. You can also schedule file submissions to ECXpert.
- Receive Files from ECXpert—Opens a window in which you can enter the ECXpert host address (such as *ftp.YourCompany.com* or *205.115.164.123*) and port number (for FTP the default is 21), the login name and password, the sender name (must be a valid ECXpert member name), the receiver name (must be a valid ECXpert member name), the ECXpert document type, the file prefix, and the download path. You can also set up the Windows machine to receive files from ECXpert according to a schedule.
- Transfer Now—Starts the transfer of any selected entries.
- Schedule—Opens a window so you can set a specific time for a transfer to occur.
- Change Destination—Opens a Save As window so you can set the download directory for the selected entries and, if desired, change the name.
- Information—Opens the transfer log screen for the selected items.
- Remove—Deletes any selected files from the transfer list.
- Close—Closes the Manager screen.
- Exit—Exits the Partner Agent client.

Edit Menu

The Edit menu of the Manager screen contains the standard Windows controls for Undo, Cut, Copy, Paste, Select All, and Invert Selection. You can also access the Preferences screen.

To access the preferences screen from the Edit menu, select Edit > Preferences. For more information about setting preferences, refer to “Preferences Screen,” on page 50.

View Menu

The following options are available in the View menu of the Manager screen.

- Toolbar—Toggles the display of the Manager toolbar.
- Status Bar—Toggles the display of the Status bar at the bottom of the screen.

- Progress Window—Displays the Progress screen
- Files to Receive—Displays a list of files that are being received or scheduled to be received from a machine *other than ECXpert*.
- Files to Send—Displays a list of files that are being sent or scheduled to be sent to a machine *other than ECXpert*.
- Files Received—Displays a list of files that have been received from a machine *other than ECXpert*.
- Files Sent—Displays a list of files that have been sent to a machine *other than ECXpert*.
- Files to Submit to ECXpert—Displays a list of files that are being sent or scheduled to be sent to ECXpert.
- Files Submitted to ECXpert—Displays a list of files that have been sent to ECXpert.
- Files to Receive from ECXpert—Displays a list of files that are being received or scheduled to be received from ECXpert.
- Files Received from ECXpert—Displays a list of files that have been received from ECXpert.

NOTE The name of the list of files currently displayed (e.g., Files Received from ECXpert) appears under the top menu bar.

Each of the Files options in the View menu can also be selected by clicking the Expand ▼ button under the top menu bar and selecting the option from the drop-down list that appears.

Help Menu

The following options are available in the Help menu of the Manager screen.

- Quick Help—Launches the online help for Partner Agent Client in a browser window.
- About iPlanet Partner Agent—Displays information about Partner Agent, including the version number.

  To open a browser window displaying the iPlanet web site, click About iPlanet.

Profiles—New Explore Screen

Use the Profiles - New Explore screen to create, modify, copy, or delete connection profiles or to explore a location to find files to transfer. You can explore any local drive or any remote site that has a profile. You can also use this screen to create a desktop shortcut to a profile.

Profiles

A profile is stored information about a connection. This makes it easy to connect to commonly used servers without having to retype information. Profiles can be selected when you send or receive files, but they must be created in the Profiles - New Explore screen.

Accessing the Profiles - New Explore Screen

To access the Profiles - New Explore screen:

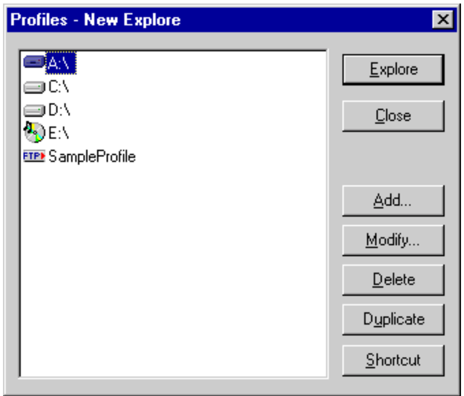
- Right-mouse click on the Partner Agent icon in the Windows system tray.
- From the right-mouse menu, select Explore.

  OR
- From the Manager screen, select File > Explore.

  OR
- Click the Explore button in the toolbar.

The Profiles - New Explore screen displays (Figure 3-4).

Figure 3-4 Profiles - New Explore screen



Explore Profile

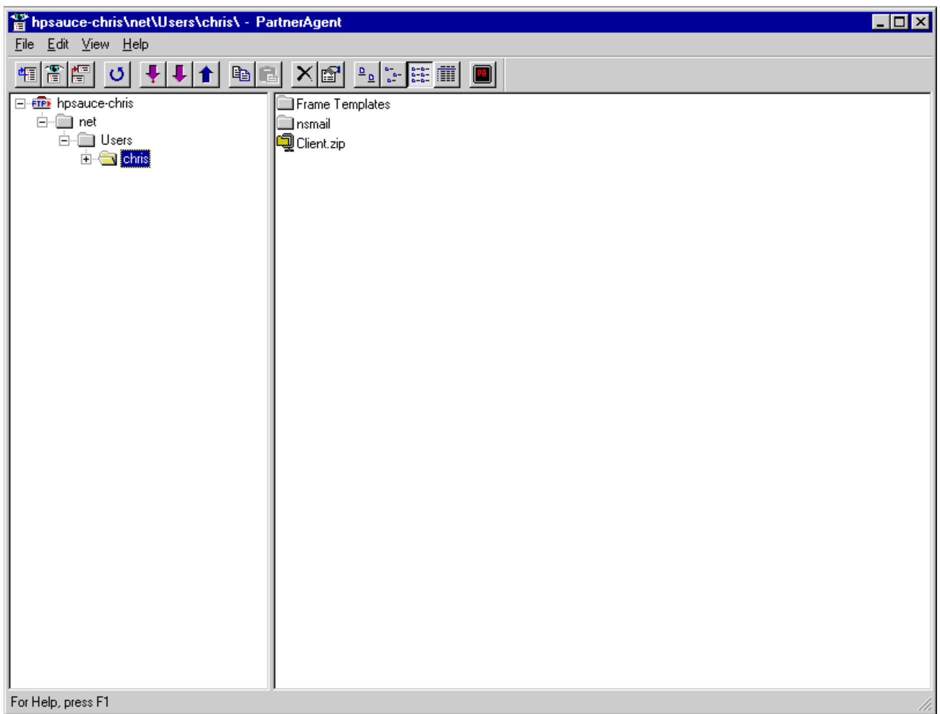
To Explore a connection profile or local drive:

1. Select a drive or profile to explore from the window of the Profiles - New Explore screen.

2. Click Explore.

   An Explore screen displays (Figure 3-5).

Figure 3-5 Explore screen for a selected drive or profile



   If you selected a connection profile, Partner Agent attempts to connect and display the contents of the directory specified in the profile.

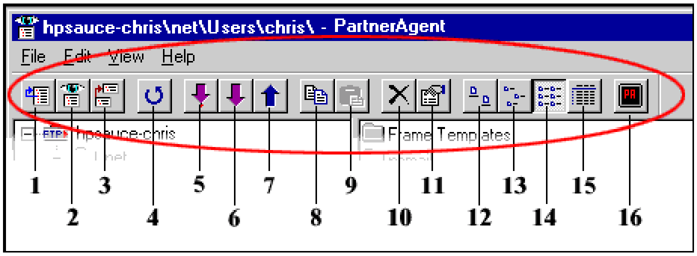
   If you selected a local drive or folder, the Explore screen displays the contents of the drive or folder.

3. Click on folders to explore further.

Explore Toolbar

The Explore toolbar, at the top of the Explore screen, has sixteen buttons. Refer to Figure 3-6 to identify each button with its name and function.

Figure 3-6 Explore screen toolbar



1. Up one level—Changes the current view up one folder or directory level.
2. New Explore—Opens a new Explore screen.
3. Explore From Here—Opens a new Explore screen with the current folder as the starting point.
4. Refresh—Refreshes the current view.
5. Download To—Opens a Download To window, which downloads the selected file to a location that you specify in the window.
6. Download—Downloads the selected file to the default location.
7. Upload—Opens an Upload screen to select a file. The file is uploaded to the location that is selected in the Explore screen.
8. Copy—Copies the selection to the clipboard.
9. Paste—Pastes the clipboard contents.
10. Delete—Deletes the selected file or folder.
11. Properties—Displays properties of files and folders.
12. Large Icons—Shows large icons.
13. Small Icons—Shows small icons.
14. List—Shows a list of files and folders.
15. Details—Shows details of files and folders.
16. Manager—Switches to the Manger screen.

Transferring Files From the Explore Screen

You can transfer files several ways from the Explore screen. You can use buttons in the toolbar, you can use the right-mouse menu, or you can drag and drop.

Drag and Drop

You can drag and drop files to and from the Explore screen. You can do this to upload or download files or folders.

You can drag and drop to between the Explore screen:

- The desktop.
- The Manager screen.
- Another Explore screen.
- A Microsoft Explorer window.

Downloading

Other ways to download a file, from the Explore screen:

1. Explore to locate a file and if necessary click once on the file to select it.
2. Use the right-mouse menu to select download or download to.

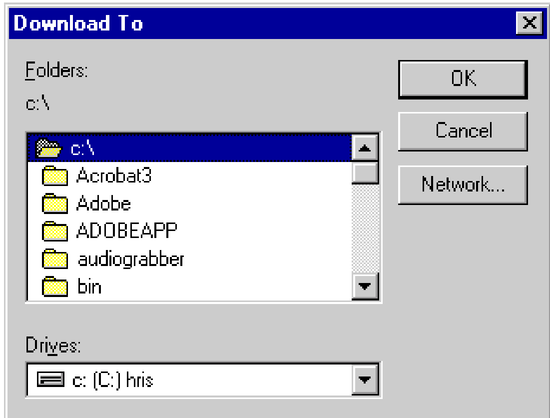
   OR

   Click the download button, (the down-pointing arrow), in the Explore toolbar.

   If you select download, Partner Agent attempts to download the selected file. If you select download to, the Download To screen displays.

NOTE	You can download files from ECXpert using the Explore screen only when the ECXpert partnership for the specific Sender/Receiver/Document Type uses the FTP protocol and a service that deposits incoming documents into your ECXpert mailbox. If incoming documents are not stored in your ECXpert mailbox, you will not be able to retrieve them using the Explore screen.

Figure 3-7 Download To screen



3. Use the Drives drop-down list to locate the drive to which to download the file.
4. Use the Folders drop-down list to locate the desired folder.
5. If desired, click Network to locate a drive on your network.
6. Click Cancel to abort the download.
7. Click OK to start the download.

   Partner Agent downloads the selected file.

Uploading

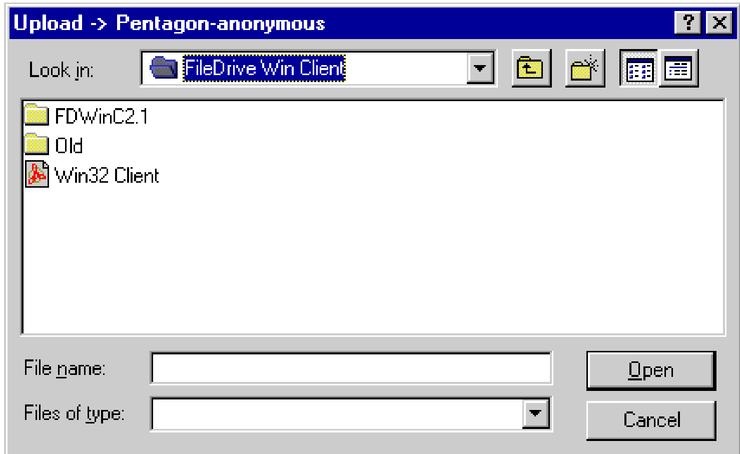
Other ways to upload a file to a non-ECXpert machine from the Explore screen:

1. Explore to locate the directory or folder into which you want to upload a file.
2. Select upload from the right-mouse menu.

   OR

   Click the upload button—the up-pointing arrow—in the Explore toolbar.

Figure 3-8 An Upload screen displays.Upload screen



3. Use the Look in drop-down list to locate the file to be uploaded.
4. Click on the file to select it.

   The file name displays in the File name field.
5. Click Open to start the upload.

   The file is uploaded.

NOTE You cannot upload files to ECXpert using the Explore screen.

To upload files to ECXpert, see “Submitting Files to ECXpert,” on page 62.

Adding a Profile

To create a connection profile, in the Profiles - New Explore screen:

1. Click Add.

   An Explore Profile screen displays.

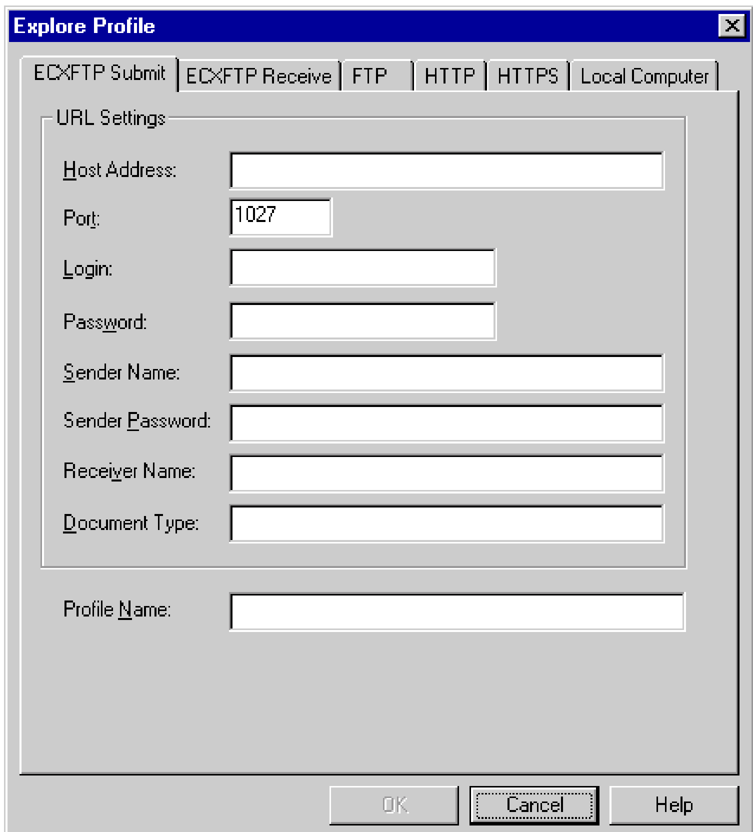
   The Explore Profile screen contains six pages: one for each connection type. The connection types are ECXFTP Submit, ECXFTP Receive, FTP, HTTP, HTTPS, and Local Computer. The FTP, HTTP and HTTPS pages are identical except that the FTP page contains an option to login as an anonymous user.

2. Select the appropriate Tab for the connection type.

3. Enter information in the following fields:

For ECXFTP Submit profiles:

Figure 3-9 Explore Profile screen, ECXFTP Submit tab

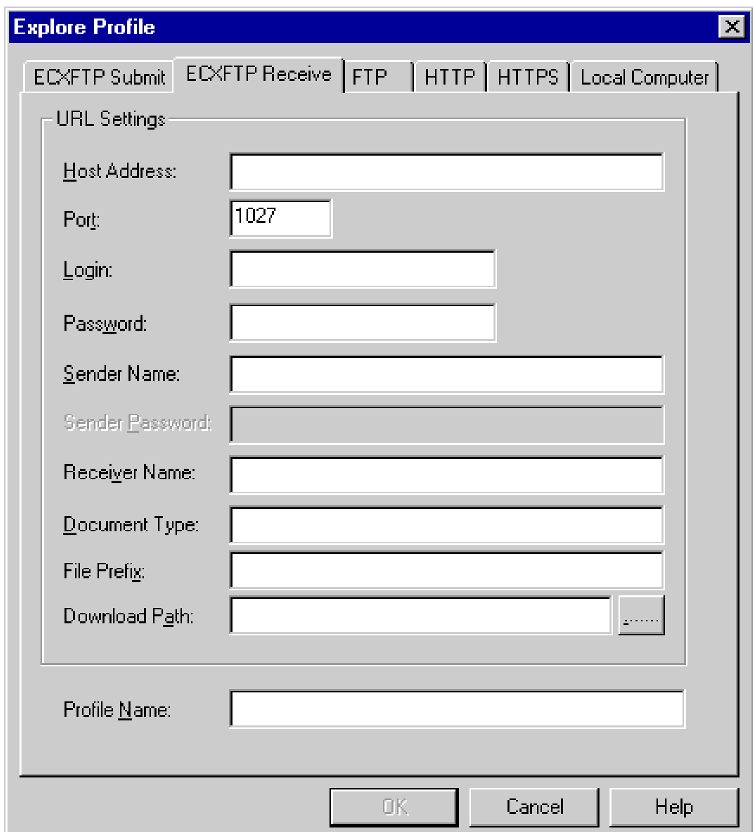


- Host Address—Enter the address of the ECXpert host.
- Port—Enter the ECXpert host port. The default port—1027—is already entered, but you can enter any desired value.
- Login—Enter the sender's login name.
- Password—Enter the sender's password for connect.
- Sender Name—Enter the sender's ECXpert membership ID.

- Sender Password—Enter the sender’s ECXpert password.
- Receiver Name—Enter the receiver’s ECXpert membership ID.
- Document Type—Enter the ECXpert document type.
- Profile Name—Enter a Profile name. This field automatically displays information you enter into the Host Address and Login fields, but you can enter any desired name.

For ECXFTP Receive profiles:

Figure 3-10 Explore Profile screen, ECXFTP Receive tab

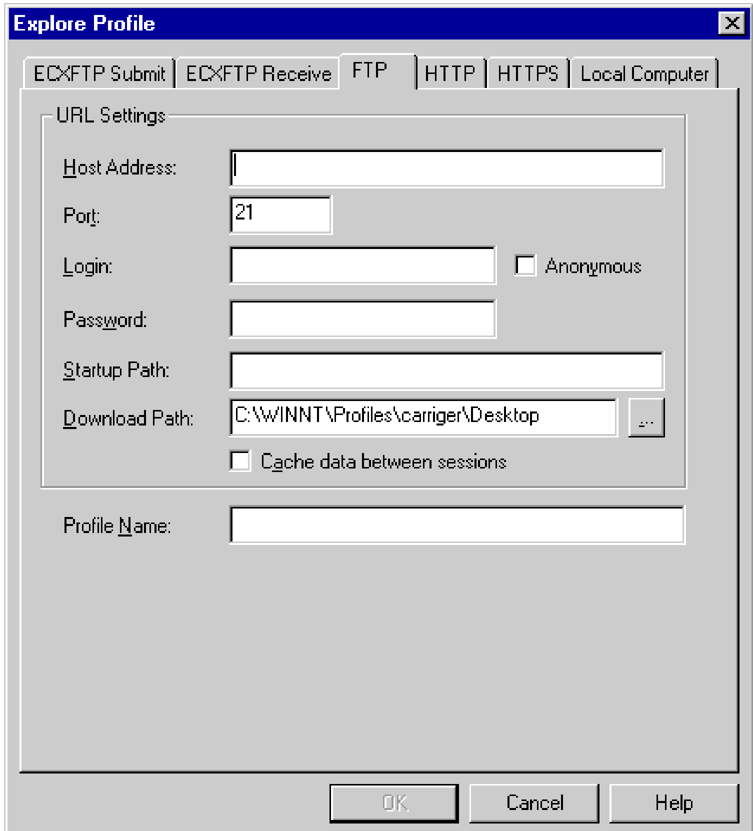


- Host Address—Enter the address of the ECXpert host.
- Port—Enter the ECXpert host port. The default port—1027—is already entered, but you can enter any desired value.

- Login—Enter the receiver's login name.
- Password—Enter the receiver's password for connect.
- Sender Name—Enter the sender's ECXpert membership ID.
- Receiver Name—Enter the receiver's ECXpert membership ID.
- Document Type—Enter the ECXpert document type.
- File Prefix—Enter an optional prefix to be added to the names of incoming files.
- Download Path—This field displays any current default download path. Enter a path or use the Browse button to select where you want to download files.
- Profile Name—Enter a Profile name. This field automatically displays information you enter into the Host Address and Login fields, but you can enter any desired name.

For FTP, HTTP, and HTTPS profiles:

Figure 3-11 Explore Profile screen, FTP tab



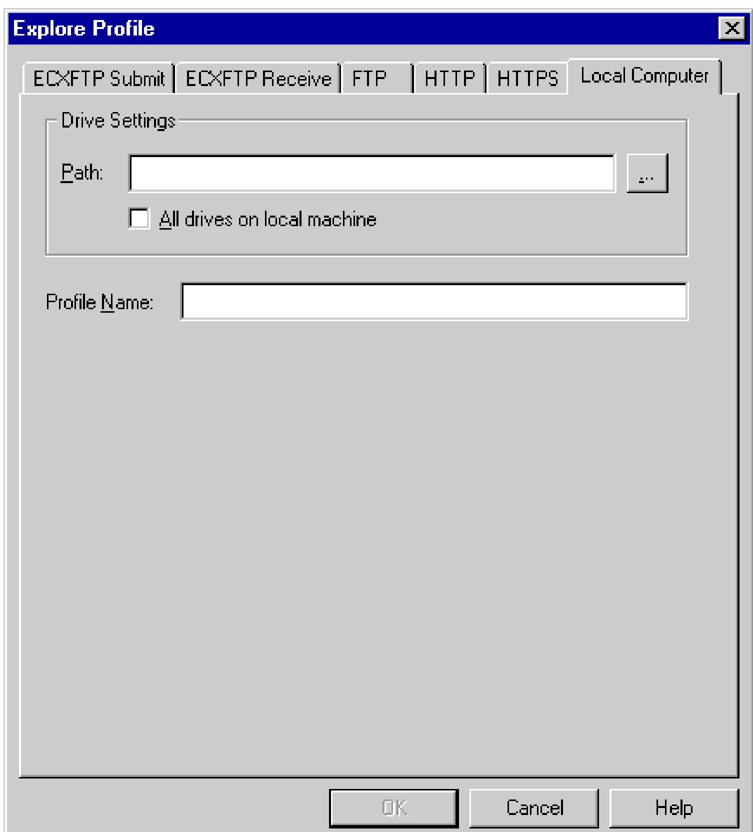
- Host Address—Enter the address of the host to which you will connect.
- Port—Enter a port. The default ports are already entered, but you can enter any desired value.
- Login—Enter your login name (if not anonymous).
- Anonymous—For anonymous logins (FTP only), select this check box.

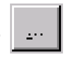
NOTE When this box is checked, the Login and Password fields fill in automatically.

- Password—Enter your password for connect.
- Startup Path—Enter the startup path on the server you are exploring.
- Download Path—This field displays any current default download path. Enter a path or use the Browse button to select where you want to download files.
- Cache data between sessions—Select this option to have Partner Agent cache data between sessions.
- Profile Name—Enter a Profile name. This field automatically displays information you enter into the Host Address and Login fields, but you can enter any desired name.

  For Local Computer profiles:

Figure 3-12 Explore Profile screen, Local Computer tab



- Path—Enter the desired local path, use the  button to select a local path or select the all drives option below.
- All drives on local machine—Select this option to include all drives.
- Profile Name—Enter a Profile name. This field automatically displays any information entered in the Path field, but you can enter any desired name.

4. Click OK.

NOTE If you have not entered all the required information for a new profile, the OK button is disabled.

The Profile name is displayed in the list of profiles in the Profiles - New Explore screen.

Modifying a Profile

To modify a connection profile:

1. Select a profile from the list of profiles in the Profiles - New Explore screen.
2. Click Modify.
3. Make the desired changes.
4. Click OK.

   The profile is modified.

Duplicating a Profile

To copy a connection profile:

1. Select a profile from the list of profiles in the Profiles - New Explore screen.
2. Click Duplicate.

   A copy of the profile is created in the list of profiles in the Profiles - New Explore screen. A suffix is added that includes the copy number, for example the first copy of the profile **`New Profile`** is called **`New Profile-1`**.

Deleting a Profile

To delete a connection profile:

1. Select a profile from the list of profiles in the Profiles - New Explore screen.
2. Click Delete.

   The profile is removed in the list of profiles in the Profiles - New Explore screen.

Creating a Shortcut

To create a shortcut to a connection profile:

1. Select a profile from the list of profiles in the Profiles - New Explore screen.
2. Click Shortcut.

   A shortcut to the selected profile is added to your desktop.

Exiting the Profiles - New Explore Screen

To exit the screen:

- Click Close.

  OR

- Click the X in the upper right-hand corner of the screen.

Progress Screen

The Progress screen shows the status of any files that are waiting to be transferred and the progress of files that are transferring. If a file is being transferred, you can pause it from this screen.

To access the Progress screen:

- Right-mouse click on the Partner Agent icon in the Windows system tray.
- From the right-mouse menu, select Progress.

  OR

- From the Manager screen, select View > Progress window.

  The Progress screen displays (Figure 3-13), and a Partner Agent button appears in the Windows task bar at the bottom of the screen.

Figure 3-13 Progress screen

Progress Screen Options

The following options are available when a file is transferring.

- To pause a transfer, click Pause.
- To cancel a transfer, click Cancel.
- To access the Manager screen, click Manager.

If no file is transferring, the Pause and Cancel buttons are disabled.

Preferences Screen

Preferences allow you to create your own business and security standards for using Partner Agent. The Preference screen is where you set your preferences.

To access the Preferences screen:

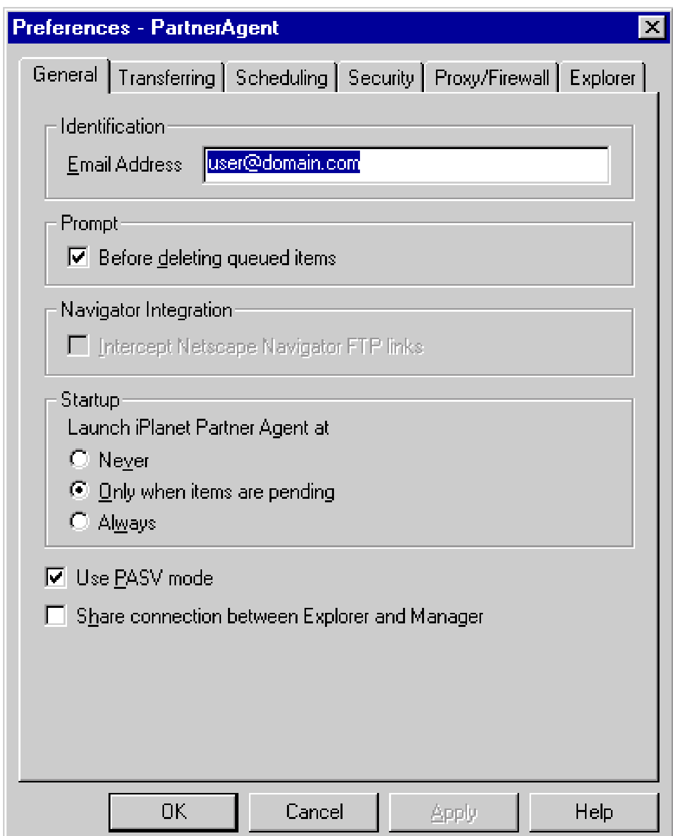
- Right-mouse click on the Partner Agent icon in the Windows system tray.
- From the right-mouse menu, select Preferences.

  OR

- From the Manager screen, select Edit > Preferences.

  The Preferences screen displays.

Figure 3-14 Preferences screen, initial tab



Preference settings are contained on six pages within the Preferences screen. Each page has a tab at the top with its name. The pages are:

- General
- Transferring
- Scheduling
- Security
- Proxy/Firewall
- Explore

To display a page:

- Click the appropriate tab at the top of the Preferences screen.

To set preferences:

1. Use the tabs to switch pages.
2. Select any desired options.
3. Click Apply.

To cancel any changes you have made:

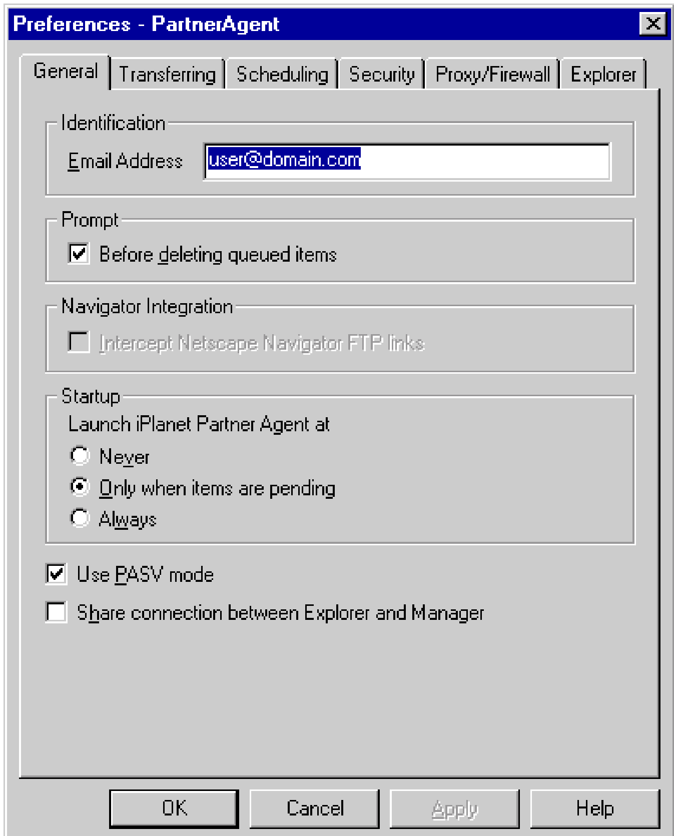
- Click Cancel.

To display the Help file:

- Click Help.

General Preferences

Figure 3-15 Preferences screen, General tab



The following options are available on the General page:

- Identification: Email address—Enter your email address. It is used as your password when you log in as an anonymous user.
- Prompt: Before deleting queued items—If this option is selected, you are prompted when you try to delete items that are waiting to be transferred.
- Navigator Integration: Intercept Navigator links—This option is disabled.

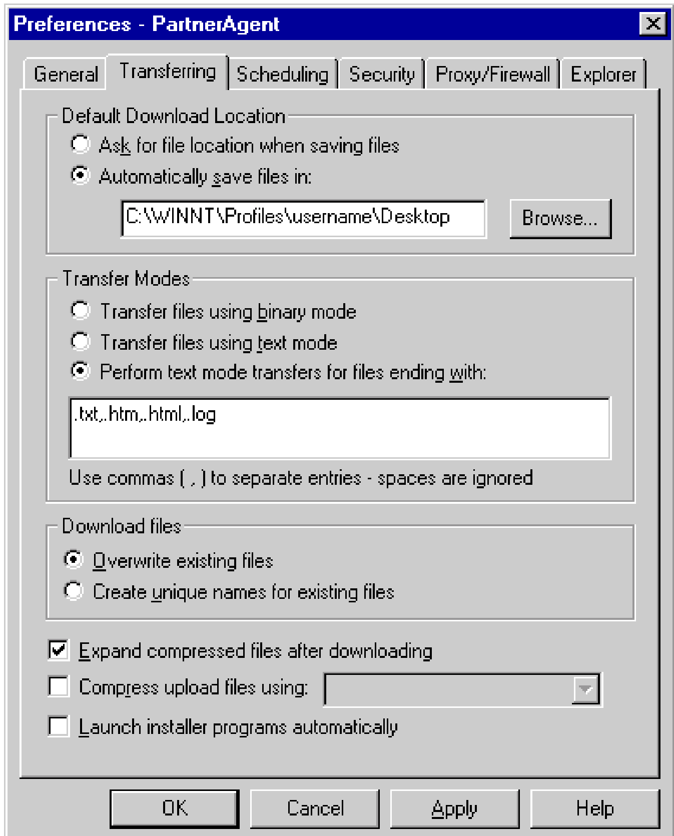
- Startup: Launch Partner Agent at system startup—Select one of the radio buttons to determine if you want the Partner Agent Client to start automatically at System Startup. Select Never, Only when items are pending, or Always.
- Use PASV mode—If this option is selected, the Server provides the address and port for the Client to connect to when transferring. If this option is not checked, the Client is in PORT mode and provides the address and port for the Server to connect to when transferring.
- Share connection between Explorer and Manager—If this option is selected, the Client is limited to one connection with the Server. If this option is not selected, you can transfer a file while exploring; a new connection is made to the Server so you can continue exploring while the transfer occurs.

NOTE This option is required if your Server is set up to only allow one connection per login.

The advantage of using this option (if it is not required) is that transfers occur more quickly since the overhead of re-login is eliminated. The disadvantage is that you can not explore while performing a transfer.

Transferring Preferences

Figure 3-16 Preferences screen, Transferring tab



The following options are available on the Transferring page:

- Default Download Location—Use the radio buttons to select whether you want the Client to ask for file location when saving files or to automatically save files in a specified directory. If you choose to have Partner Agent ask for a location, you are prompted each time you download a file. If you choose to automatically save, enter the path name or use the Browse button to locate the desired folder.

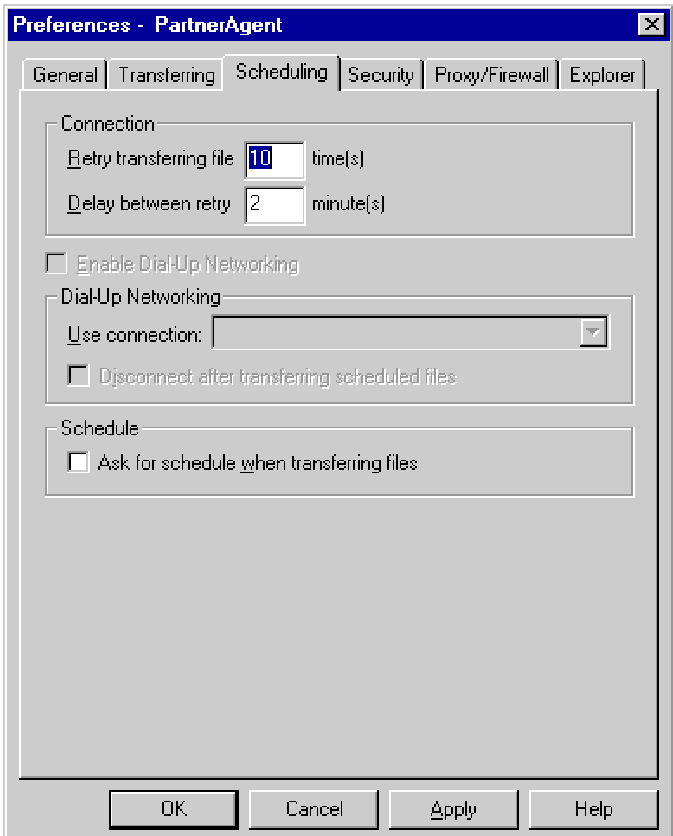
- Transfer Mode—Use the radio buttons to select the transfer mode. Select to transfer files using binary or text mode, or to perform text mode transfers for files ending with specific suffixes. If you select the last option, enter the file suffixes, (for example *.html* or *.txt*), separated by commas, in the field below. Files of types not specified are transferred in binary mode.
- Download files—Use the radio buttons to select whether to overwrite files on your system that have the same name as files that are downloading or to create new unique names for the downloading files.
- Expand compressed files after downloading—Select this option to have the Client decompress compressed files after download.
- Compress upload files using—Select this option to have the Client compress files that you are sending. If you select this option, use the drop-down menu to select a compression application.

NOTE We recommend using WinZip™ with Partner Agent Client.

- Launch installer programs automatically—Select this option to have the Client start installer programs that you download.

Scheduling Preferences

Figure 3-17 Preferences screen, Scheduling tab



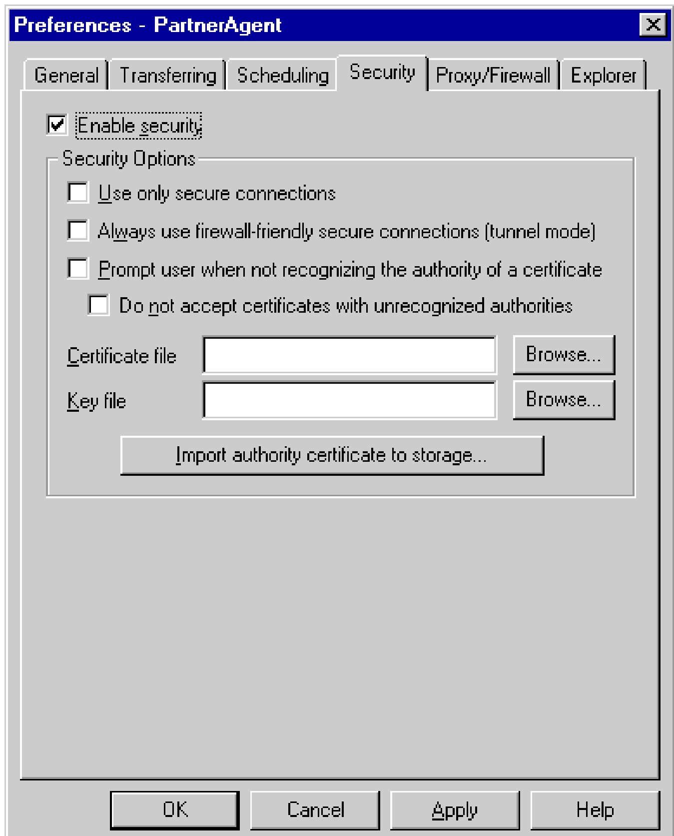
The following options are available on the Scheduling page:

- Connection—Enter the number of times you want to retry a failed connection in the Retry transferring file field. Enter the number of minutes to wait between retries in the Delay between retry field.
- Enable Dial-up Networking—Select this option to use a dial-up account. If you select this option, use the drop-down menu to select from your phone list entries, which have been set up through your control panel. For Windows 95 and 98, your password must be specified in the dial-up login window.

- Schedule—Select this option to have the Schedule screen open before any transfer occurs.

Security Preferences

Figure 3-18 Preferences screen, Security tab



The following options are available on the Security page:

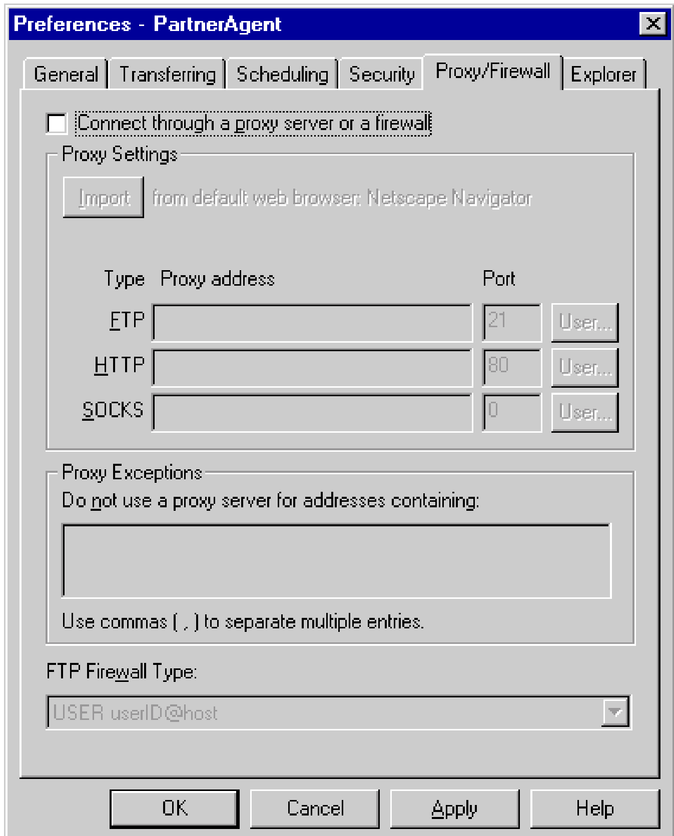
- Enable Security— Select this option to have the Client negotiate to use the Server's security system upon connection. Use the checkboxes below to set the desired level of security.

NOTE	If this option is selected, files will still transfer without security if the Server has no security, unless you select the Use only secure connections option.

- Use only secure connections— Select this option to require encrypted (SSL) connections.
- Always use firewall-friendly secure connections (tunnel mode)—Select this option to require the Client to connect in tunnel mode.
- Prompt user when not recognizing the authority of a certificate— Select this option to have the Client warn you if a server certificate is from an unknown source.
    - Do not accept certificates with unrecognized authorities— Select this option to require server certificates from known sources to be present in your certificate file.
- Certificate file— Enter the pathname for a user's certificate file or use the Browse button to locate a certificate file.
- Key file— Enter the pathname for a user's key file or use the Browse button to locate a key file.
- Import authority certificate to storage—Click this button to locate and manually import a server's certificate to the Windows Client machine.

Proxy/Firewall Preferences

Figure 3-19 Preferences screen, Proxy / Firewall tab



The following options are available on the Proxy / Firewall page:

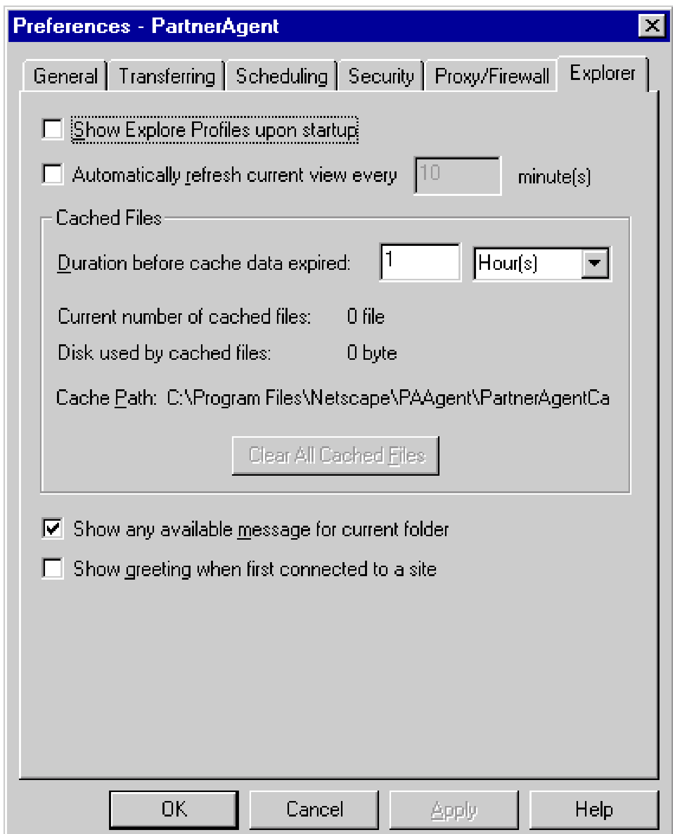
- Connect through a proxy server or a firewall—Select this option to configure the Client to connect to other local network computers through a proxy server or through a firewall.
- Proxy Settings—Enter the Proxy address for the type of proxy you are using—FTP, HTTP, or SOCKS—in the appropriate fields or, to import the settings from your default browser, click the Import button.

  For FTP, HTTP, or SOCKS servers that require a user name and password, click User and enter your user name and password.

- Proxy Exceptions—Enter any addresses for which you do not want to use a Proxy Server. Use commas to separate multiple entries. Wildcards can be used in this field.
- FTP Firewall Type—For FTP firewalls, select the firewall type from the drop-down menu.

Exploring Preferences

Figure 3-20 Preferences screen, Explorer tab



The following options are available on the Explorer page:

- Show Explore Profiles upon startup— Select this option to have the Client show the Explore profiles. For more on profiles, see *Profiles* on page 35.
- Automatically refresh current view—Select this option to have the Client automatically refresh the current directory view, and enter the number of minutes after which it should refresh. The Client connects to the current Server and updates the view periodically based on the number of minutes entered in the minutes field.
- Cached Files—Enter a time period for the cache data to expire. To manually clear the cache, click the Clear All Cached Files button. This section also lists the current number of cached files, the amount of disk space used and the path of the cache.
- Show any available message for current folder—Select this option to have the Client display messages for a selected folder on the Explore screen.
- Show greeting when first connected to a site—Select this option to have the Client display a greeting acknowledging your first connection to a site.

Chapter 4

Transferring Files

This chapter describes different ways to transfer files and folders with Partner Agent Client. This chapter also describes how to schedule transfers.

Transferring files or folders can be sending or receiving, (downloading or uploading). Scheduling of transfers is done to optimize resources and for regularly occurring transfers.

The following topics are discussed in this section:

- Submitting Files to ECXpert
- Sending Files to Another User
- Receiving Files or Folders from ECXpert
- Receiving Files or Folders from Another User
- Scheduling File Transfers

Submitting Files to ECXpert

Use Partner Agent Windows Client to send, i.e., upload, files or groups of files from your machine or network to ECXpert over the Internet, quickly and securely. To send files, use the File menu from the Manager screen or the Explore screen.

NOTE	To send files *to another user*, see “Submitting Files to ECXpert,” on page 62.

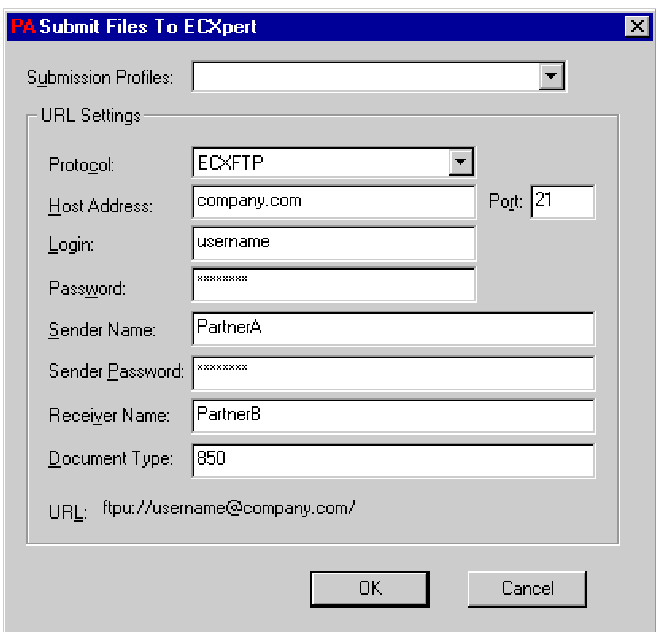
Submitting Files to ECXpert using the File Menu

To send a file to ECXpert from the Manager screen:

1. From the menu, select File > Submit Files to ECXpert.

A Submit Files to ECXpert window displays (Figure 4-1).

Figure 4-1 Submit Files to ECXpert screen



2. If desired, select a submission profile from the Submission Profiles drop-down list.

The URL Settings display the information from the selected profile.

NOTE If you change any of the fields, the profile name is not displayed in the Connection Profiles field.

---

3. Enter information in the URL Settings section of the window.

   If you are using a profile and do not want to modify any of the settings, skip this step.

   a. The Partner Agent Windows Client supports one protocol: ECXFTP. You cannot modify this setting.

   b. In the Address field, enter the address of the ECXpert server.

      You may specify the exact IP address of the server using the standard dot format, for example *205.164.115.160*.

   c. Enter the port on which the ECXpert server is listening for a connection in the Port field.

   d. Enter your user name in the User field or select the Anonymous checkbox.

      If the Anonymous checkbox is selected, this field is not editable and the word *anonymous* is displayed.

   e. Enter your password in the Password field.

      If you selected the Anonymous checkbox, enter your user and domain name, for example *alien@wigglytreats.org*.

   f. In the Sender Name field, enter your ECXpert member ID.

   g. In the Sender Password field, enter your ECXpert member password.

   h. In the Receiver Name field, enter the ID of the ECXpert member to whom you are submitting a file.

   i. In the Document Type field, enter the ECXpert document type.

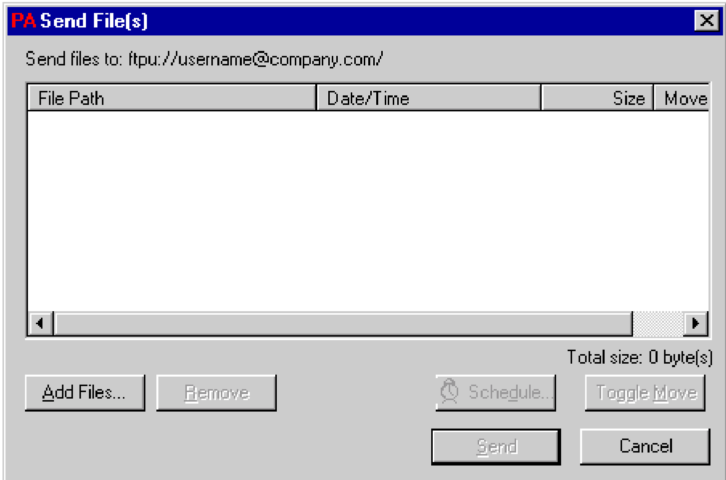
   The entire URL for where the file is being sent is displayed next to the word *URL*.

4. If you want to abort the transfer, click Cancel.

5. To start the transfer, click OK.

   After you click OK, the Send File(s) window displays, where you select the files or folders to transfer (Figure 4-2).

Figure 4-2 Send File(s) screen



Adding Files

To select a file to transfer to ECXpert:

1. Click Add Files.

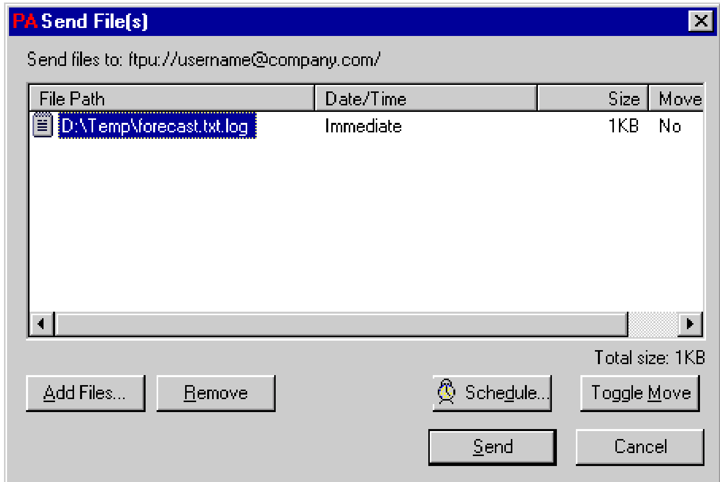
   An Open window displays.

2. Browse to locate a file in the Open window.

3. Double-click on the file, to add it to the list of files to send.

   The file is added to the list of files to Send (Figure 4-3).

Figure 4-3 Send File(s) screen with a file selected for transfer



Removing Files

1. Select a file from the list of files to send to ECXpert.
2. Click Remove (Figure 4-3).

Toggling the Move Feature

To have the original file deleted after you upload it, enable the Move feature. When move is enabled, the word *yes* is displayed in the list of files to send, in the Move column.

To toggle the move feature:

1. Select a File or folder.
2. Click Toggle Move (Figure 4-3).

   The move column displays yes or no, depending on what was previously selected.

Starting a Transfer

To transfer the file, either start the transfer or schedule it for another time.

Canceling a Transfer

To cancel the transfer:

1. Select a File or folder.
2. Click Cancel (Figure 4-3).

Scheduling a Transfer

To schedule the upload for a different time:

1. Select a File or folder.
2. Click Schedule (Figure 4-3).

   For more information about setting up transfer schedules, see "Scheduling File Transfers," on page 79.

Starting a Transfer

To start the transfer:

1. Select a File or folder.
2. Click Send (Figure 4-3).

   The Client attempts to transfer any files for immediate transfer or queues any files that are scheduled for later.

Sending Files to Another User

Use Partner Agent Windows Client to send, i.e., upload, files or groups of files from your machine or network to another user over the Internet, quickly and securely. To send files, use the File menu from the Manager screen or the Explore screen.

NOTE	To send files *to ECXpert*, see "Submitting Files to ECXpert," on page 62.

Sending Files using the Explore Screen

For instructions on how to send or upload files to a non-ECXpert machine from the Explore screen, see “Transferring Files From the Explore Screen,” on page 39.

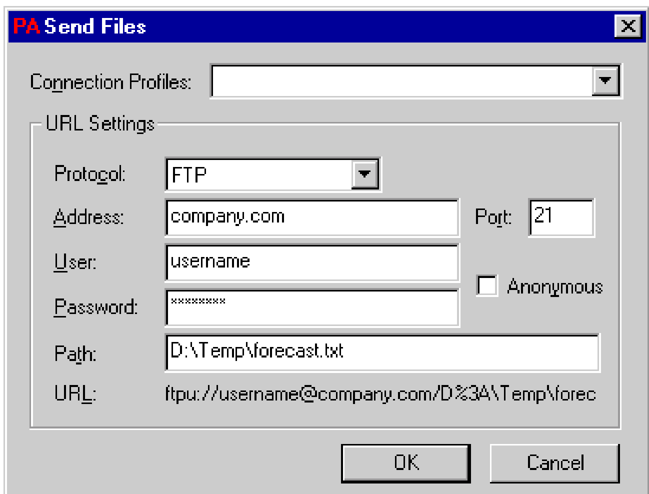
Sending Files using the File Menu

To send a file from the Manager screen:

1. From the menu, select File > Send Files.

   A Send Files window displays (Figure 4-4).

Figure 4-4 Send Files screen



2. If desired, select a connection profile from the Connection Profiles drop-down list.

   The URL Settings display the information from the selected profile.

NOTE	If you change any of the fields, the profile name is not displayed in the Connection Profiles field.

3. Enter information in the URL Settings section of the window.

If you are using a profile and do not want to modify any of the settings, skip this step.

a. Use the Protocol list to select a transfer protocol: FTP, HTTP, or HTTPS.

b. In the Address field, enter the address of the server to which you would like to send files.

You may specify the exact IP address of the server using the standard dot format, for example *205.164.115.160*.

c. Enter the port on which the server is listening for a connection in the Port field.

NOTE	Keep in mind your transfer protocol.

d. Enter your user name in the User field or select the Anonymous checkbox.

If the Anonymous checkbox is selected, this field is not editable and the word *anonymous* is displayed.

e. Enter your password in the Password field.

If you selected the Anonymous checkbox, enter your user and domain name, for example *alien@wigglytreats.org*.

f. Enter the path to where you want the file uploaded in the Path field.

The path is the name of the directory to which you want to upload files.

NOTE	The path names consist of a list of directories or folders separated by the "/" character. Path names are generally case-sensitive.

If you specify a directory in the Send Files window, the path may be left empty to specify the root path. On Windows 95 and NT, in DOS and in other programs, the "\" character is used in the file paths. Do not use the "\" character in the path field to delimit path names. The FTP standard is "/".

Some examples of path names are as follows:

- */home/joe/*

- */pub/test/samples*
- */incoming*

When specifying path names, remember that all path names are absolute path names, from the root directory of the server. A path name that starts with "/" is not relative to the login directory. Because this window is a form-based way to specify a URL, and the URL standard does not allow for relative path names from the login directory, relative path names are not supported.

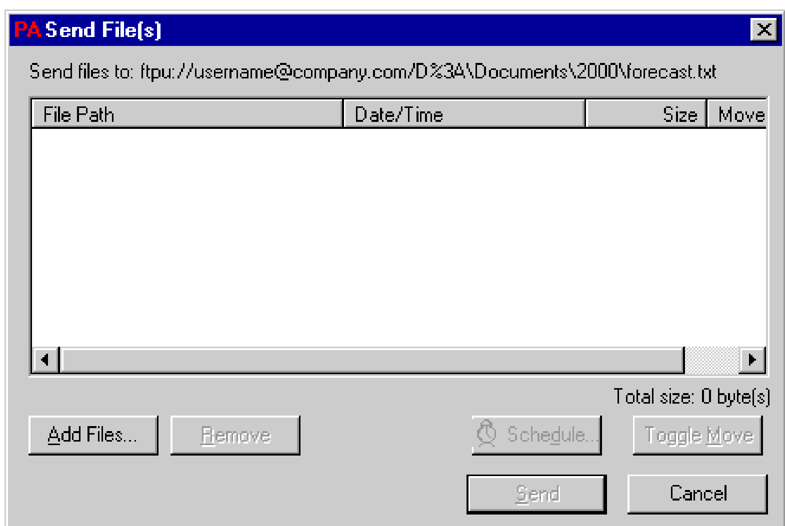
The entire URL for where the file is being sent is displayed next to the word URL.

4. If you want to abort the transfer, click Cancel.

5. To start the transfer, click OK.

After you click OK, the Send File(s) window displays where you select the files or folders to transfer (Figure 4-5).

Figure 4-5 Send File(s) screen



Adding Files

To select a file to transfer:

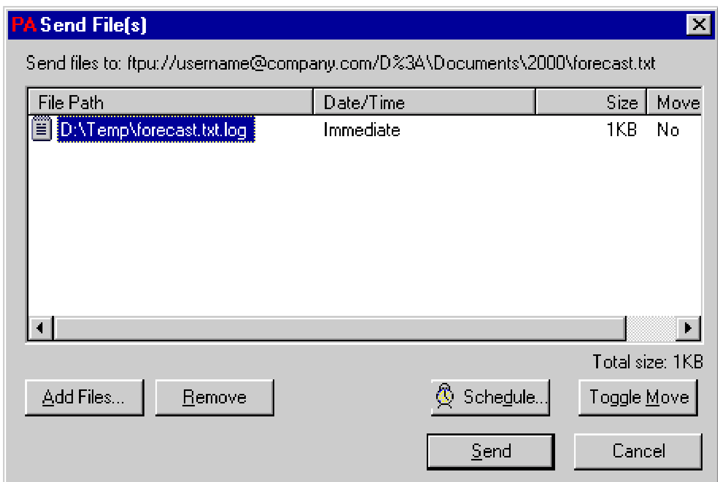
1. Click Add Files.

   An Open window displays.

2. Browse to locate a file in the Open window.
3. Double-click on the file, to add it to the list of files to send.

   The file is added to the list of files to Send (Figure 4-6).

Figure 4-6 Send File(s) screen with a file selected for transfer



Removing Files

1. Select a file from the list of files to send.
2. Click Remove in the Manager Toolbar (Figure 4-6).

Toggling the Move Feature

To have the original file deleted after you upload it, enable the Move feature. When move is enabled, the word *yes* is displayed in the list of files to send, in the Move column.

To toggle the move feature:

1. Select a File or folder.
2. Click Toggle Move (Figure 4-6).

   The move column displays yes or no, depending on what was previously selected.

Starting a Transfer

To transfer the file, either start the transfer or schedule it for another time.

Canceling a Transfer

To cancel the transfer:

1. Select a File or folder.
2. Click Cancel (Figure 4-3).

Scheduling a Transfer

To schedule the upload for a different time:

1. Select a File or folder.
2. Click Schedule (Figure 4-3).

   For more information about setting up transfer schedules, see “Scheduling File Transfers,” on page 79.

Starting a Transfer

To start the transfer:

1. Select a File or folder.
2. Click Send (Figure 4-3).

   The Client attempts to transfer any files for immediate transfer or queues any files that are scheduled for later.

Receiving Files or Folders from ECXpert

To receive files or folders from ECXpert, use the File menu from the Manager screen or the Explore screen.

NOTE	To receive files or folder from *another user*, see "Receiving Files or Folders from ECXpert," on page 72.

Receiving Files using the Explore Screen

For instructions on how to receive or download files from the Explore screen, see "Transferring Files From the Explore Screen," on page 39.

NOTE	You can download files from ECXpert using the Explore screen only when the ECXpert partnership for the specific Sender/Receiver/Document Type uses the FTP protocol and a service that deposits incoming documents into your ECXpert mailbox. If incoming documents are not stored in your ECXpert mailbox, you will not be able to retrieve them using the Explore screen.

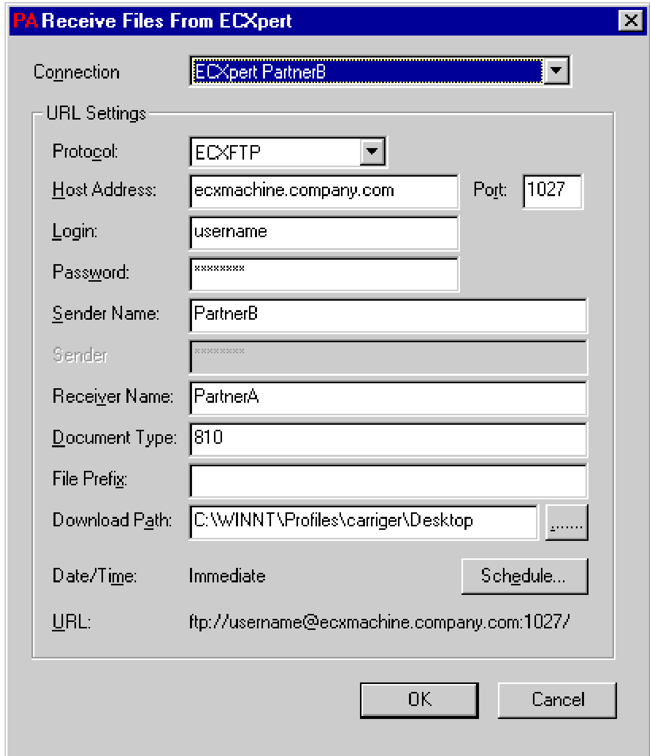
Receiving Files using the Manager Screen

To receive, i.e., download, a file, from ECXpert using the Manager screen:

1. From the menu, select File > Receive Files from ECXpert.

A Receive Files window from ECXpert displays.

Figure 4-7 Receive Files from ECXpert screen



2. If desired, select a connection profile from the Connection Profiles drop-down list.

The URL Settings display the information from the selected profile.

NOTE If you change any of the fields, the profile name is not displayed in the Connection Profiles field.

---

3. Enter information in the URL Settings section of the window.

If you are using a profile and do not want to modify any of the settings, skip this step.

a. The Partner Agent Windows Client supports one protocol: ECXFTP. You cannot modify this setting.

b. In the Address field, enter the address of the ECXpert server.

You may specify the exact IP address of the server using the standard dot format, for example *205.164.115.160*.

c. Enter the port on which the ECXpert server is listening for a connection in the Port field.

NOTE Keep in mind your transfer protocol.

d. Enter your login name in the User field or select the Anonymous checkbox.

If the Anonymous checkbox is selected, this field is not editable and the word *anonymous* is displayed.

e. Enter your password in the Password field.

If you selected the Anonymous checkbox, enter your user and domain name, for example *lmyoung@heart.org*.

f. In the Sender Name field, enter the ID of the ECXpert member who is sending you a file.

g. In the Receiver Name field, enter your ECXpert member ID.

h. In the Document Type field, enter the ECXpert document type you will receive.

NOTE If multiple files with the same sender, receiver, and document type are available in the ECXpert system for retrieval, Partner Agent Client can retrieve only one of them at a time.

To retrieve more than one file with the same sender, receiver, and document type, schedule downloads at regular intervals ("Repeating Transfers," on page 81). ECXpert will mark each file as it is downloaded, until all of the files have all been retrieved.

i. In the File Prefix field, enter any alphanumeric text that you want to be prepended to the file name when it is received.

j. Enter the path from where the file is to be downloaded, in the Host Path field.

The path is the name of the directory where the file or files are located. Separate multiple entries with Returns, (not commas).

NOTE The path name consists of a list of directories or folders separated by the "/" character. Path names are generally case-sensitive.

If you specify a directory in the Receive Files window, the path may be left empty to specify the root path. On Windows 95 and NT, in DOS and in other programs, the "\" character is used in the file paths. Do not use the "\" character in the path field to delimit path names. The FTP standard is "/".

Some examples of path names are as follows:

- `/home/joe/`
- `/pub/test/`
- `/incoming`

When specifying path names, remember that all path names are absolute path names, from the root directory of the server. A path name that starts with "/" is not relative to the login directory. Because this window is a form-based way to specify a URL, and the URL standard does not allow for relative path names from the login directory, relative path names are not supported.

k. To schedule the download, click Schedule (see "Scheduling File Transfers," on page 79).

The entire URL for any files being downloaded is displayed next to the word URL.

4. If you want to abort the transfer, click Cancel.

5. To start the transfer, click OK.

After you click OK, Partner Agent attempts to download any files for immediate transfer or queues up any files for scheduled downloading.

Receiving Files or Folders from Another User

To receive files or folders from a server over the Internet, use the File menu from the Manager screen or the Explore screen.

NOTE	To receive files or folder from *ECXpert*, see “Receiving Files or Folders from ECXpert,” on page 72.

Receiving Files using the Explore Screen

For instructions on how to receive or download files from the Explore screen, see “Transferring Files From the Explore Screen,” on page 39.

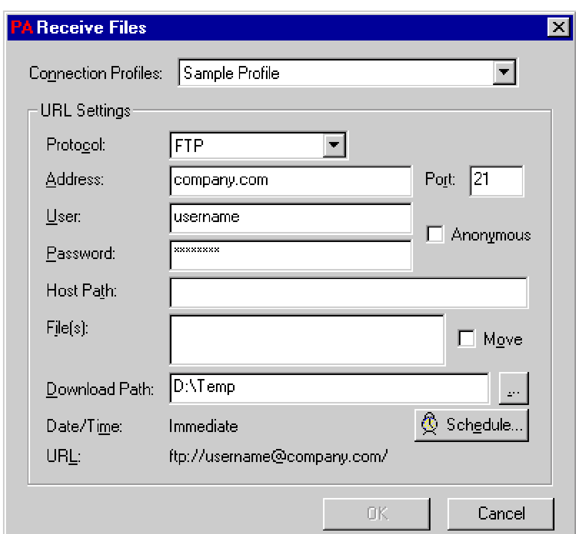
Receiving Files using the Manager Screen

To receive (i.e., download) a file, from the Manager screen:

1. From the menu, select File > Receive Files.

A Receive Files window displays.

Figure 4-8 Receive Files screen



2. If desired, select a connection profile from the Connection Profiles drop-down list.

   The URL Settings display the information from the selected profile.

   NOTE If you change any of the fields, the profile name is not displayed in the Connection Profiles field.

3. Enter information in the URL Settings section of the window.

   If you are using a profile and do not want to modify any of the settings, skip this step.

   a. Use the Protocol drop-down list to select a transfer protocol: FTP, HTTP or HTTPS.

   b. In the Address field, enter the address of the server from which you would like to download the file or files.

      You may specify the exact IP address of the server using the standard dot format, for example *205.164.115.160*.

   c. Enter the port on which the server is listening for a connection in the Port field.

      NOTE Keep in mind your transfer protocol.

   d. Enter your user name in the User field or select the Anonymous checkbox.

      If the Anonymous checkbox is selected, this field is not editable and the word *anonymous* is displayed.

   e. Enter your password in the Password field.

      If you selected the Anonymous checkbox, enter your user and domain name, for example *lmyoung@heart.org*.

f. Enter the path from where the file is to be downloaded, in the Host Path field.

The path is the name of the directory where the file or files are located. Separate multiple entries with Returns, (not commas).

NOTE The path name consists of a list of directories or folders separated by the "/" character. Path names are generally case-sensitive.

If you specify a directory in the Receive Files window, the path may be left empty to specify the root path. On Windows 95 and NT, in DOS and in other programs, the "\" character is used in the file paths. Do not use the "\" character in the path field to delimit path names. The FTP standard is "/".

Some examples of path names are as follows:

- `/home/joe/`
- `/pub/test/`
- `/incoming`

When specifying path names, remember that all path names are absolute path names, from the root directory of the server. A path name that starts with "/" is not relative to the login directory. Because this window is a form-based way to specify a URL, and the URL standard does not allow for relative path names from the login directory, relative path names are not supported.

g. Enter the name of any files you want to download, in the File(s) field.

h. To delete the file from the server after you download it, select the Move checkbox.

i. To schedule the download, click Schedule (see "Scheduling File Transfers," on page 79).

The entire URL for any files being downloaded is displayed next to the word URL.

4. If you want to abort the transfer, click Cancel.

5. To start the transfer, click OK.

After you click OK, Partner Agent attempts to download any files for immediate transfer or queues up any files for scheduled downloading.

Scheduling File Transfers

Partner Agent has a schedule feature that allows you to choose when and how often you want to transfer files. This is especially useful if you are moving large files or folders and want to perform the transfer at the end of the business day when the server is not as busy.

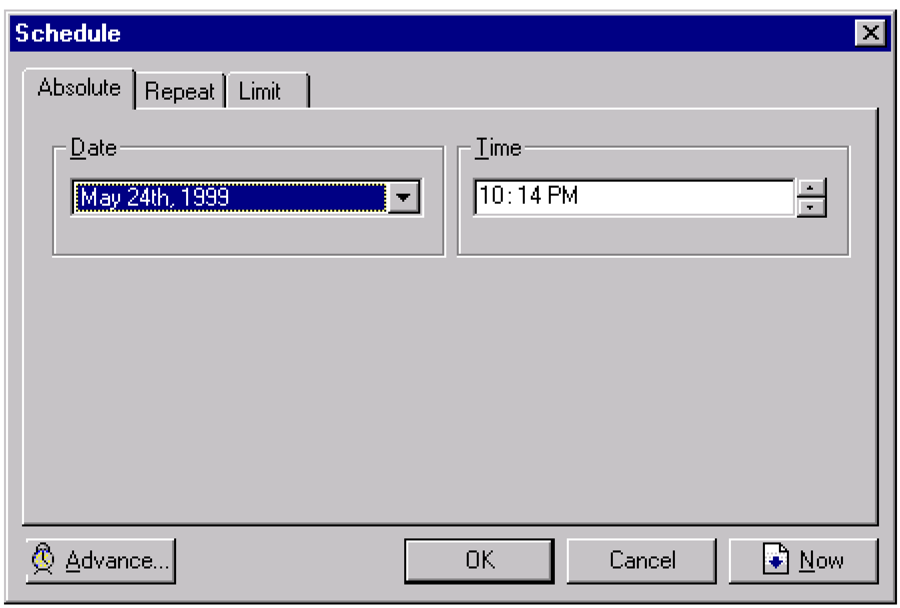
To schedule any transfer:

- When you set up a file transfer, click on 

.

A Schedule window displays (Schedule screen, Absolute tab).

Figure 4-9 Schedule screen, Absolute tab



In the scheduling window, you have the following choices for scheduling file transfers:

- Absolute
- Repeat
- Limit

You can also schedule multiple transfers for the same file or folder with the Advance Feature (see "Using the Advance Schedule," on page 84).

Setting an Absolute Time

An absolute transfer is a one-time transfer for which you set the day and time. To set an absolute transfer:

1. Click on the Date drop-down list.

   A calendar appears.

2. Click on the date you want to transfer the file.

   Use the left and right pointing arrows to display a different month.

3. To select the time you want the transfer to occur, click the arrow keys next to the Time field.

   To adjust hours, minutes or AM/PM, click on the hours, minutes or AM/PM and then click the arrows to adjust the desired time.

4. To schedule multiple transfers, click Advance.
5. To schedule the transfer, click OK.
6. To abort the scheduling —not the transfer—click Cancel.
7. To transfer the file immediately rather than according to a schedule, click Now.

   You will return to the Send File(s) screen, from which you can send or cancel the file transfer.

Repeating Transfers

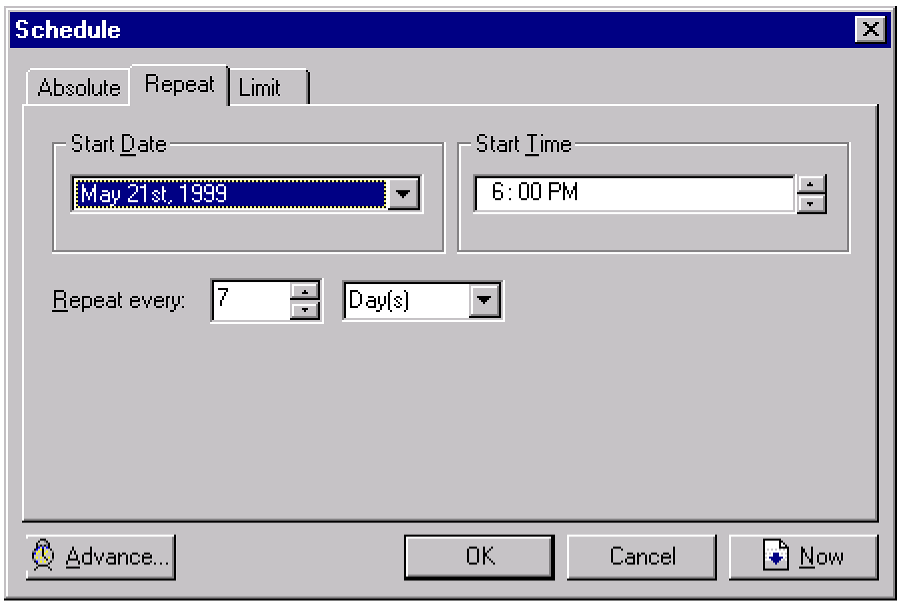
The Repeat feature allows you to set a transfer to occur on a periodic basis from a specific starting date and time. Set the period to be a number of minutes, hours, or days.

To use the Repeat schedule feature:

1. Click on the Repeat tab, in the Schedule window.

The Repeat page displays.

Figure 4-10 Schedule screen, Repeat tab



2. Click on the Start Date drop-down list, to select the start date.

A calendar appears.

3. Click on the date you want to transfer the file.

Use the left and right pointing arrows to display a different month.

4. To select the time for the first transfer to occur, click the arrow keys next to the Start Time field.

   To adjust hours, minutes or AM/PM, click on the hours, minutes or AM/PM and then click the arrows to adjust to the desired time.

5. Enter the repeat number in the Repeat every field.

6. Use the drop-down list to select the period: either days, hours, or minutes.

7. To schedule multiple transfers, click Advance.

8. To schedule the transfer, click OK.

9. To abort the scheduling —not the transfer—click Cancel.

10. To transfer the file immediately rather than according to a schedule, click Now.

    You will return to the Send File(s) screen, from which you can send or cancel the file transfer.

Setting Time Limits

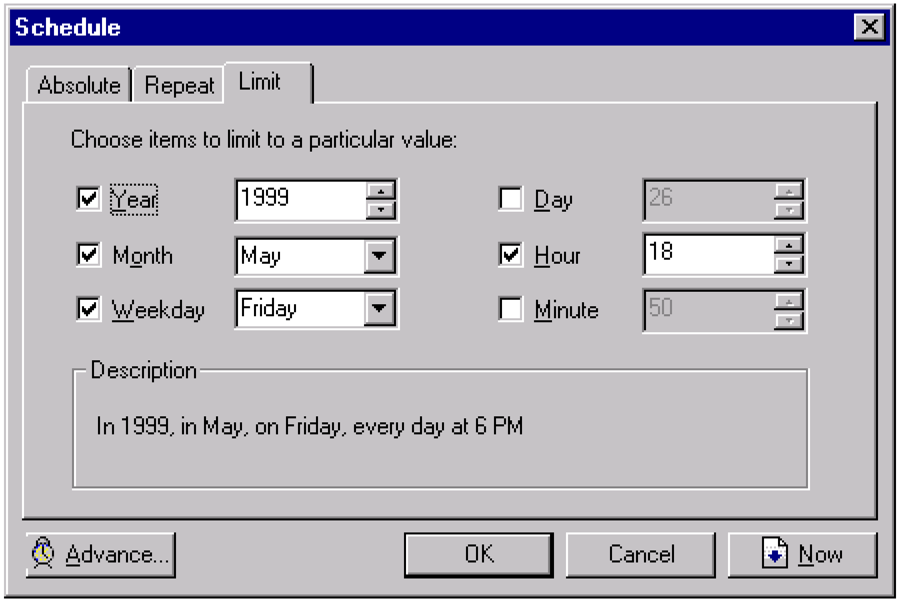
The Limits feature lets you choose specific values such as the year, month, day, hour, minute.

To use the Limit schedule feature:

1. Click on the Limit tab, in the Schedule window.

   The Limit page displays.

Figure 4-11 Schedule screen, Limit tab



2. Use the checkboxes to choose parameters to limit the transfer.

   When you select a checkbox, use its arrows or drop-down list to select the desired values.

   The Description box describes the limit you have selected.

3. To schedule multiple transfers, click Advance.

4. To schedule the transfer, click OK.

5. To abort the scheduling —not the transfer—click Cancel.

6. To transfer the file immediately rather than according to a schedule, click Now.

   You will return to the Send File(s) screen, from which you can send or cancel the file transfer.

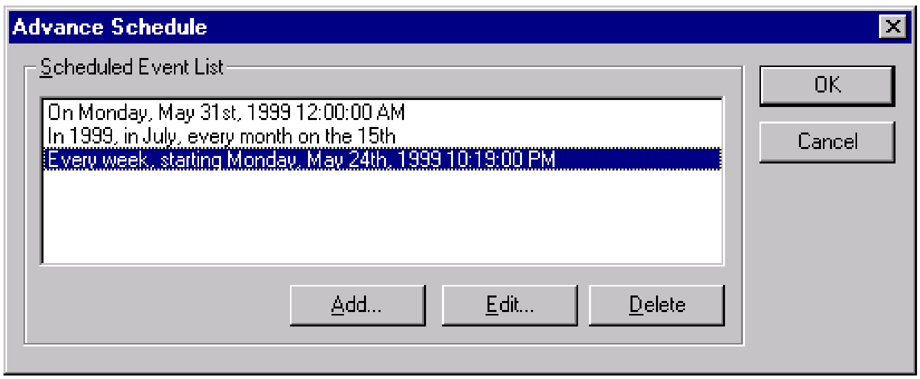
Using the Advance Schedule

Use the Advance feature to schedule multiple transfers for the same file. To use the Advance feature:

1. At the bottom of the schedule window, click Advance.

   The Advance window displays. Any scheduling that has been set up is displayed in the Scheduled Event List.

Figure 4-12 Schedule screen, Advance Schedule option



2. Click Add to add a scheduled event.

   A schedule window displays.

3. Schedule a transfer, according to the instructions in "Setting an Absolute Time," on page 80, "Repeating Transfers," on page 81, or "Setting Time Limits," on page 82.
4. Click OK.

   The Advance Schedule window displays with the new entry in the Scheduled Event List.

5. To change a selected entry, click Edit.
6. To remove an entry from the Scheduled Event List, click Delete.
7. Click OK when you are done.
8. To abort the scheduling of the transfer, click Cancel.

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