

EFT SERVER WEB-BASED ADMINISTRATION

*Installing, configuring and using the
EFT Server Web Administration Interface*

globalscape™

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Installation and Configuration of the EFT Server Web Administration Interface

The EFT Server Web Administration interface allows you to remotely manage EFT Server using a web browser. This chapter describes the requirements, installation, and configuration of the interface.

After ensuring that the requirements are met, you will configure IIS, install the Web Administration interface, create a Site, configure the Site, and authorize one or more users to access the interface.

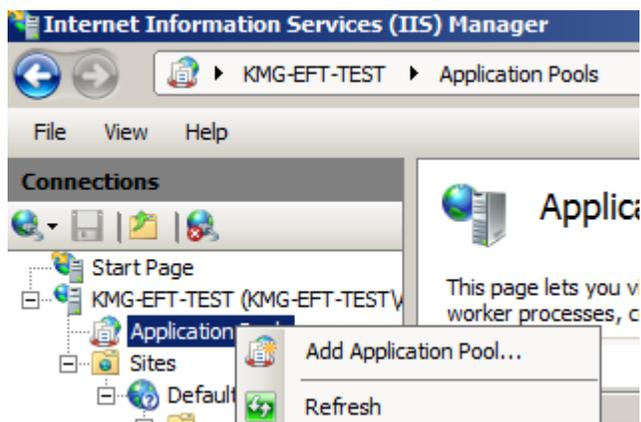
These instructions assume knowledge of the administration of Windows, IIS, and SQL Server.

Requirements

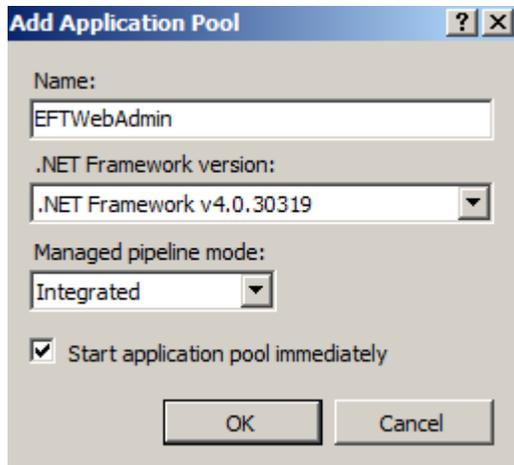
- .NET framework 4.0
- EFT Server 6.4.x
- A server running IIS
- An installed instance of SQL Server
 - If SQL Server is not installed on the computer hosting the IIS website, then the IIS server needs to have “SQL Server Management Client Tools” installed on it.
 - If the SQL database you will be using is located on a different server than the IIS server, you may need assistance from your DBA.
- Microsoft Web Deploy Installer (<http://technet.microsoft.com/en-us/library/dd569059%28v=ws.10%29.aspx>) You will need this to run `eftwebadmin.deploy.cmd` to install the interface.

Configure IIS

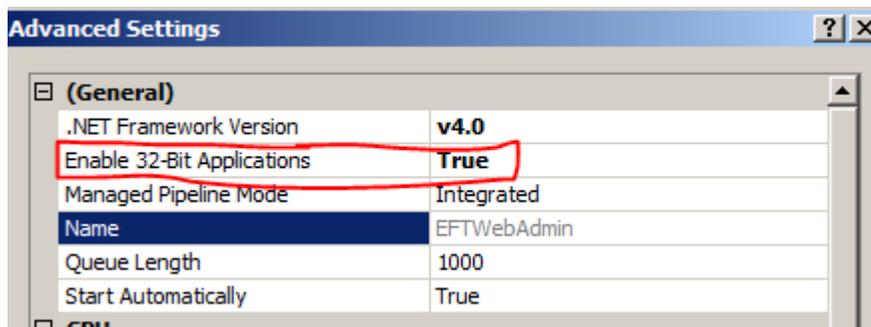
1. Open the IIS Manager (**Start > Run > inetmgr**).



2. In the **Connections** pane, expand the server node, right-click **Application Pools**, then click **Add Application Pool**. The **Add Application Pool** dialog box appears.



3. In the **Name** box, type **EFTWebAdmin**.
4. In the **.NET Framework version** box, click **.NET Framework v4.0**.
5. In the **Managed pipeline mode** box, click **Integrated**.
6. Click **OK** to save the **Application Pool**.
7. Right-click the **EFTWebAdmin** Application Pool, then click **Advanced Settings**. The **Advanced Settings** dialog box appears.



8. Make sure the **.NET Framework Version** is **v4.0**. On a 64-bit computer, ensure **Enable 32-Bit Applications** is set to **True**, then click **OK**.
9. Minimize the **IIS Manager** dialog box. Later, after the EFTWebAdmin application has been created, you will need to grant permissions to the IIS apppool\<<AppPoolName> to access the Application files.

Install the Web Administration Interface

Install the EFT Server Web Administration interface on the EFT Server computer.

To install the EFT Server Web Administration interface

1. Ensure Microsoft Web Deploy is installed on the server before proceeding.
2. Copy the **EFTWebAdmin** ZIP file to the web server.
3. At a command prompt, navigate to the root of the unzipped folder (e.g., `cd C:\Users\Administrator\Desktop\WebAdmin v2`).
4. At a command prompt, run:

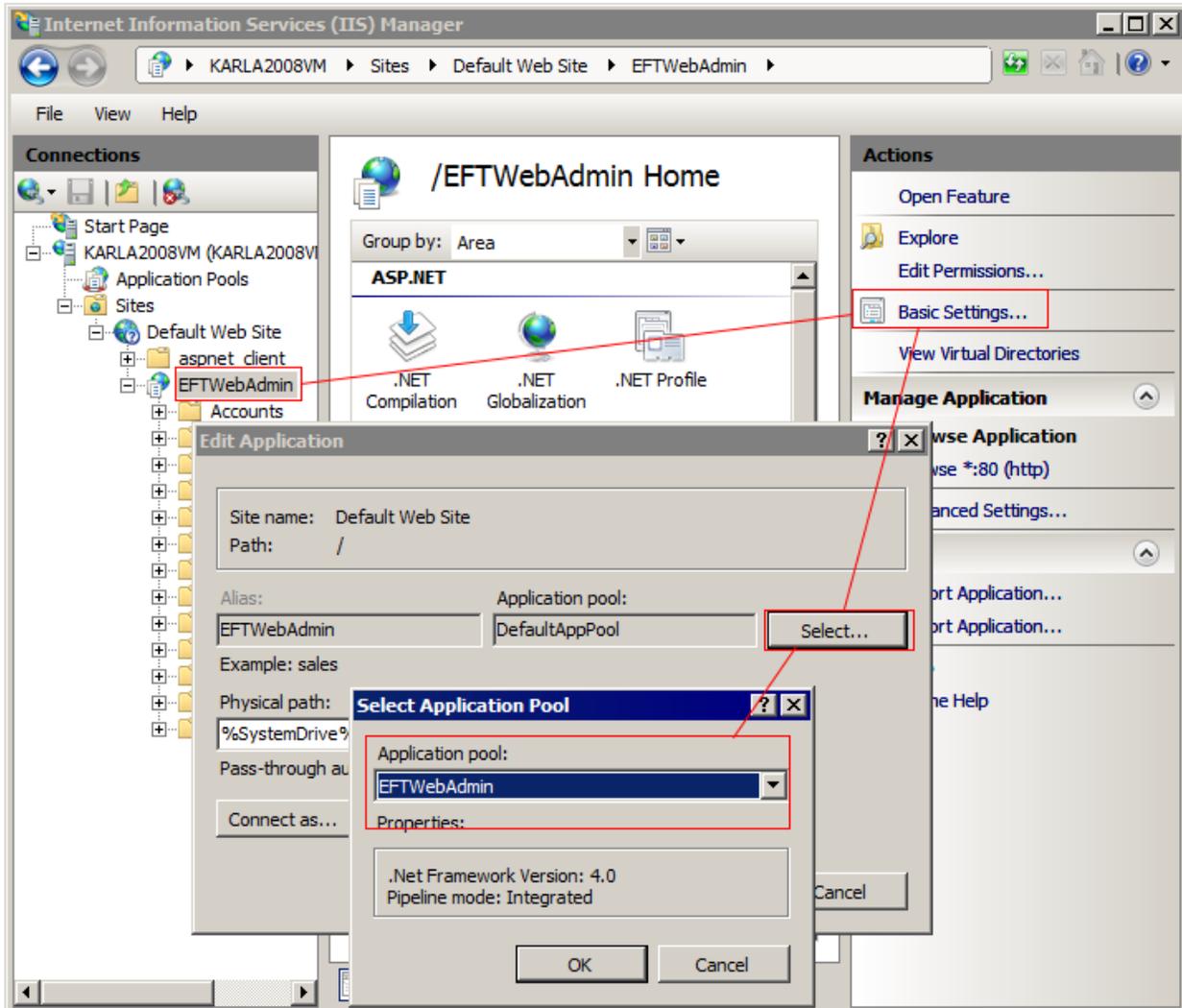
```
eftwebadmin.deploy.cmd /t
```

This will simulate the deployment and report what will actually happen when the package is deployed. If there are no errors, then you can move on to actual deployment. If it fails, resolve errors before attempting actual deployment. For example, on some 32-bit computers, the computer thinks you are using .NET Framework version v2 instead of v4. If you get this error, go back into the IIS Manager to correct it.

5. When all errors have been resolved, at a command prompt, run:

```
eftwebadmin.deploy.cmd /y.
```

6. After the package has completed installing, open the IIS Manager.
 - In the **Connections** pane, click the **EFTWebAdmin** application.
 - In the **Actions** pane, click **Basic Settings**. The **Edit Application** dialog box appears.
 - Click **Select**. The **Select Application Pool** dialog box appears.
 - Click **EFTWebAdmin**, then click **OK**.
 - Click **OK** to close the **Edit Application** dialog box.



(IIS6 Note: You will need to add default.aspx and login.aspx to the list of default documents for the website.)

7. At a command prompt, cd to the root of the **EFTWebAdmin\App_Data\scripts**. (e.g., **C:\inetpub\wwwroot\EFTWebAdmin\App_Data\scripts**) and run **installDB.bat** to your SQL database. You may have to change the credentials in the **installDB.bat** file if SQL isn't locally installed, or if the local admin account doesn't have rights to the database. There are notes in the batch file on proper syntax should you need to change the file. If possible it is advised to use SQL authentication when the SQL server is not locally installed for ease of setup.
8. After the scripts have completed, open the **web.config** file located in the root of the EFTWebAdmin folder (e.g., **C:\inetpub\wwwroot\EFTWebAdmin**) in a text editor.
9. Edit the connection string settings to apply to your environment. The EFTWebAdmin **Data Source** should point to the SQL Server you ran the **installDB.bat** script against.

```
<connectionStrings>
  <add name="EFTWebAdmin" connectionString="Data Source=.\GLOBALSCAPE;Initial
Catalog=EFTWebadmin;Trusted_Connection=true"
  providerName="System.Data.SqlClient" />
```

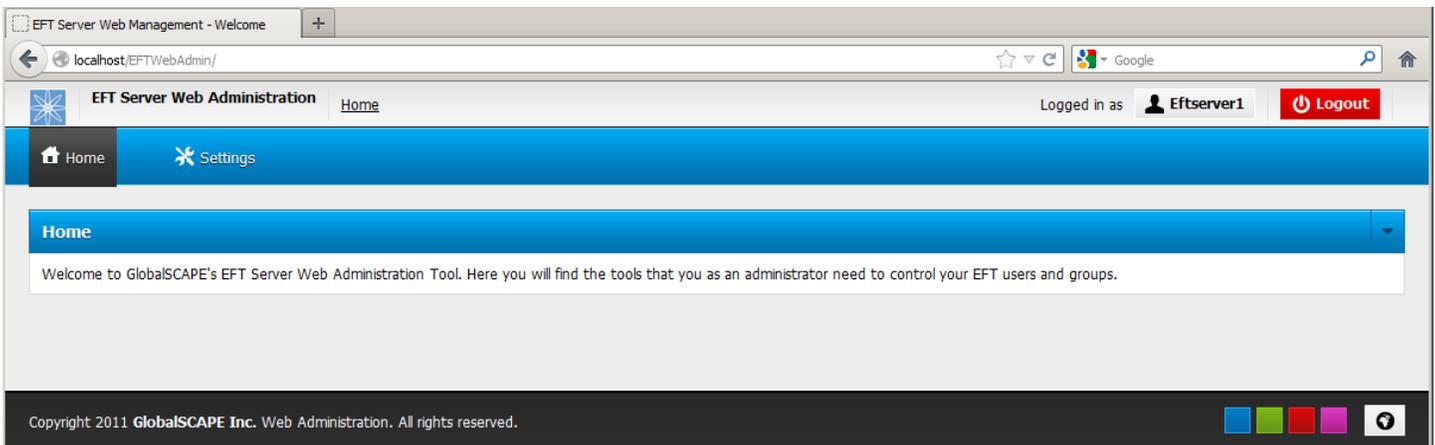
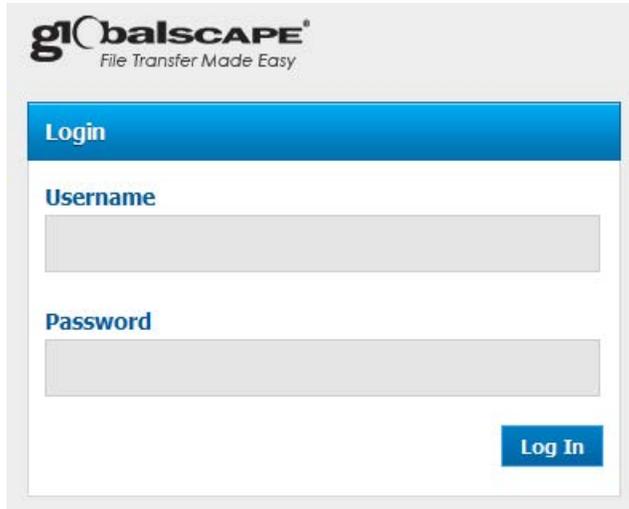
10. Edit the EFTAdminAuthProviderConnectionString to specify your EFT Server admin credentials:

```
<add name="EFTAdminAuthProviderConnectionString"
connectionString="Server=localhost;Port=1100;UserID=admin;Password=admin;EFTLoginType=EFTLogin" />
```

11. You should now be able to log into Web Admin tool with the EFT Server admin account.

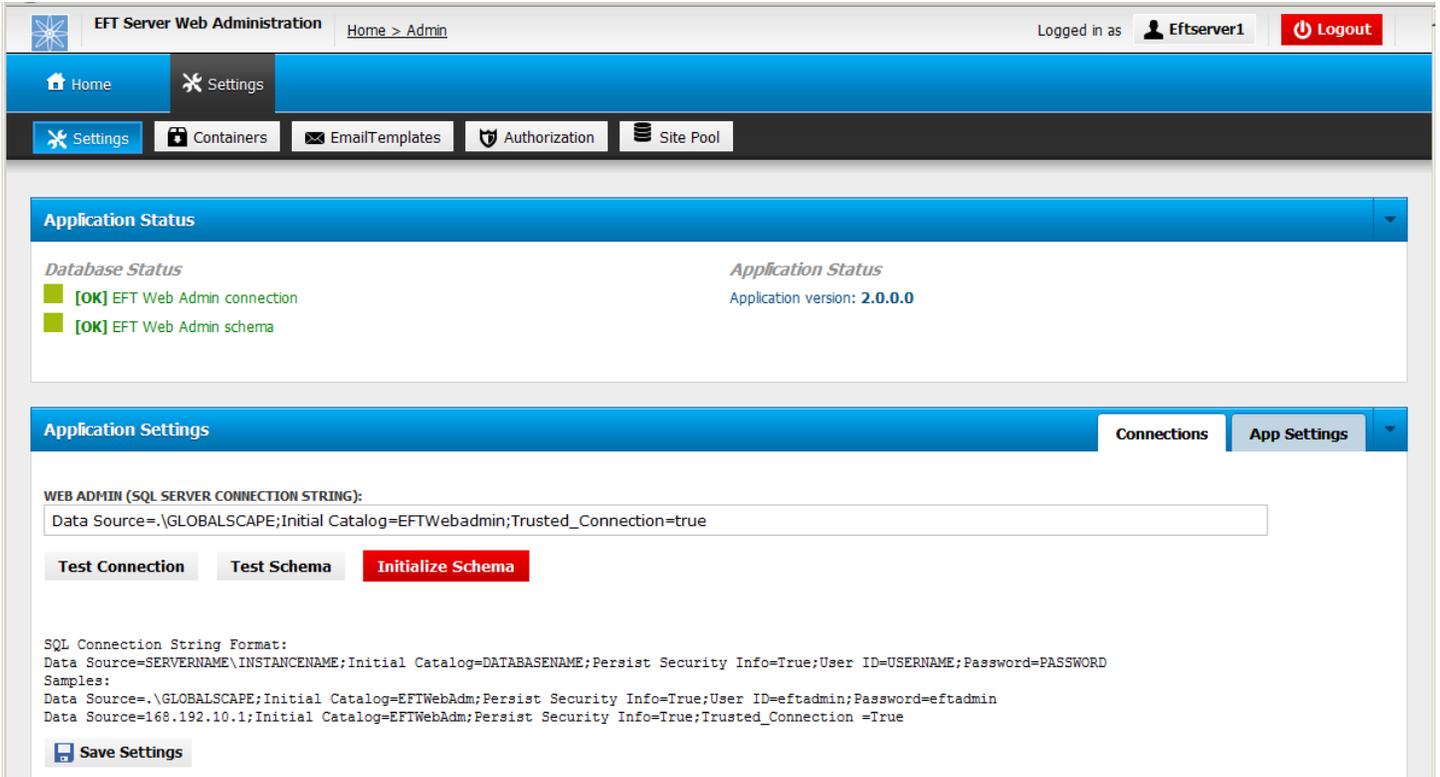
- In the IIS Manager, in the **Connections** pane, click **EFTWebAdmin**, then in the right pane, click **Browse**. The EFT Server Web Administration interface opens in the default browser.

TIP: Add the link to your browser's Bookmarks/Favorites toolbar for quick access.

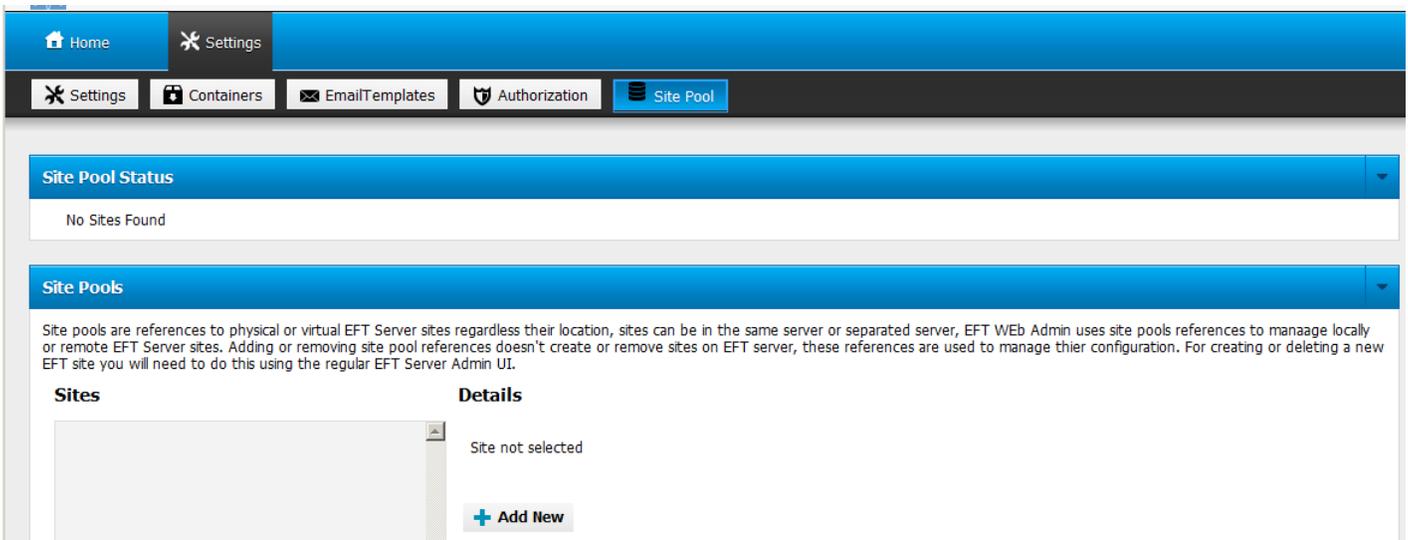


Create a Site

1. Now you will add a site entry for each site to which you want to connect. Click **Settings**.



2. The **Settings** page displays the **Application Status** and the **Application Settings**. On the top menu bar, click **Site Pool**.



3. On the **Site Pool** page, you can create and manage references to physical or virtual EFT Server Sites. Click **Add New**. The **Site Details** page appears.

Site Pools

Site pools are references to physical or virtual EFT Server sites regardless their location, sites can be in the same server or separated server, EFT WEB Admin uses site pools references to manage locally or remote EFT Server sites. Adding or removing site pool references doesn't create or remove sites on EFT server, these references are used to manage their configuration. For creating or deleting a new EFT site you will need to do this using the regular EFT Server Admin UI.

Sites

Details

Site Detail

STATUS
ENABLE

SITE LABEL

SITE DNS

SITE EFT SERVER CONNECTION

EFT SERVER ADMIN (EFT SERVER CONNECTION STRING):

Test Connection

EFT Server connection string format:
Server=%SERVER%;Port=%PORTNUMBER%;UserID=%USERNAME%;Password=%PASSWORD%;EFTLogonType=%EFTLOGONTYPE%;SiteName=%SITENAME%

EFTLogonTypes
EFTLogin : EFT Server admin accounts
IWALogin : Windows Integrated Authentication, current logged account(EFT Web Admin application pool identity) password not needed
NetLogon : Windows account, domain/user and password

Examples:
Server=localhost;Port=1100;UserID=admin;Password=admin;EFTLogonType=EFTLogin;SiteName=MySite
Server=localhost;Port=1100;UserID=domain\userA;Password=password;EFTLogonType=NetLogon;SiteName=MySite
Server=localhost;Port=1100;EFTLogonType=IWALogin;SiteName=MySite

4. Provide a **Site Label**. This is an identifier that will be seen on your web page by all of your users.
5. Provide the **Site DNS**. This is the IP address of the EFT Server for this Site.
6. Provide the **Site EFT Server Connection** string. This is the information used to connect to the EFT server. Examples are given on the web page for how to format this string.
7. Click **Test Connection** to verify that the string is formatted properly.
8. After the "EFT Server Admin Connection Test succeeded" message appears, click **Create**.
9. After the Site appears in the list of Sites, configure the Site as described below.

Success 'MySite' site has been created

SiteLabel	SiteDNS	Status	Status	AuthenticationType	Running Since	Connected(Users)	Defined(Users)	AverageSpeed
MySite	172.31.0.73		Started		1/17/2013 4:49:00 PM	0	1	0

Site pools are references to physical or virtual EFT Server sites regardless their location, sites can be in the same server or separated server, EFT WEB Admin uses site pools references to manage locally or remote EFT Server sites. Adding or removing site pool references doesn't create or remove sites on EFT server, these references are used to manage thier configuration. For creating or deleting a new EFT site you will need to do this using the regular EFT Server Admin UI.

Sites MySite

Details Site not selected

+ Add New

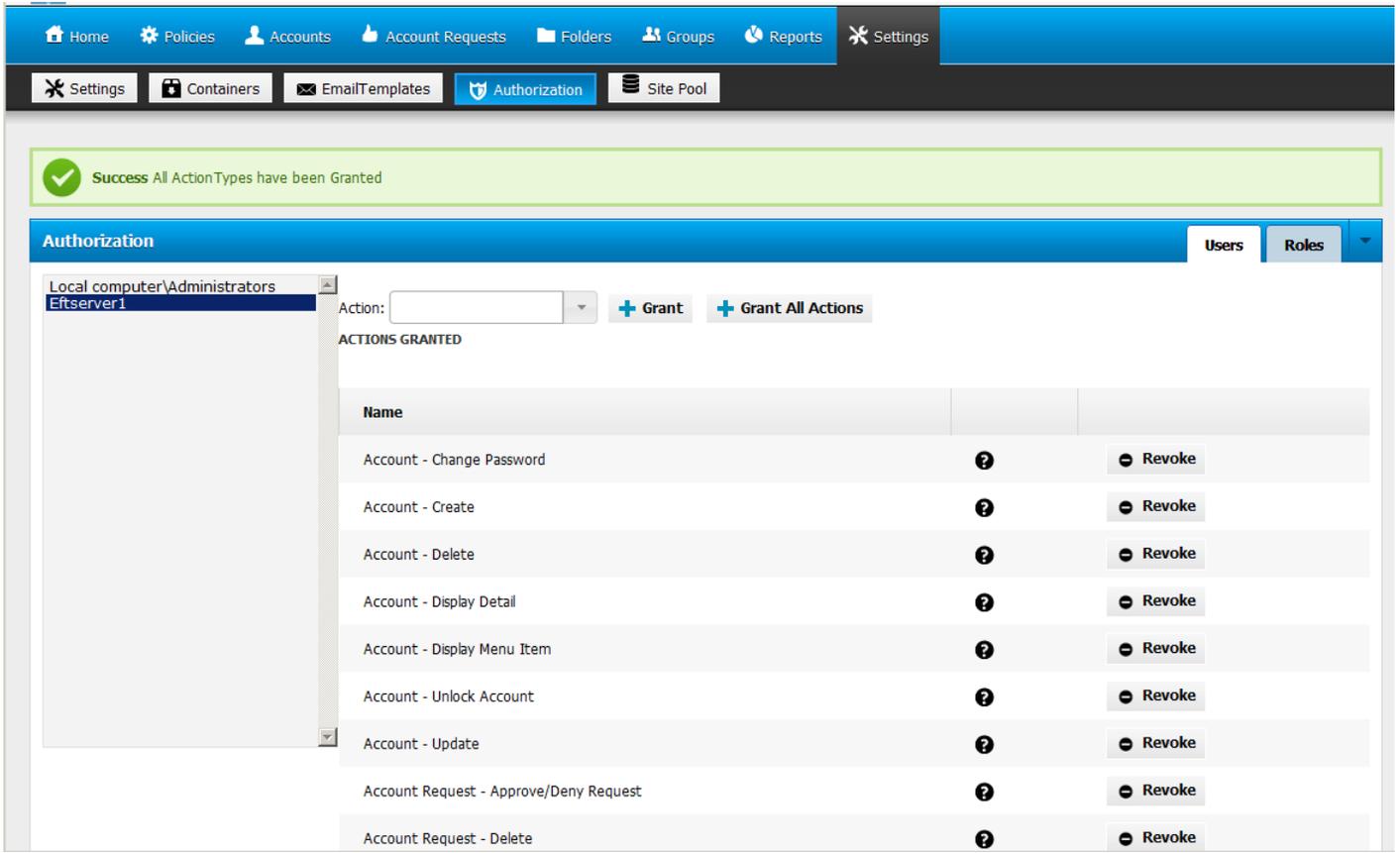
Configure the Site

The terminology in the EFT Server Web Administration interface is slightly different from that inside the EFT Server interface. You will need to know the Web Admin Tool equivalents when you configure the Site:

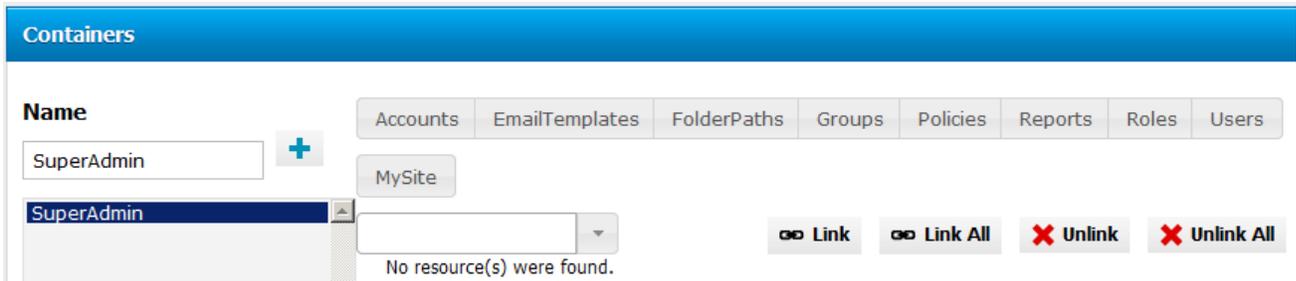
EFT Verbiage	Web Admin Tool Equivalent	Description
User Settings Template	Policy	One to one correlation
EFT Admin Account	User	One to one correlation
EFT User Account	Account	One to one correlation
EFT Account Permissions Policy	Roles	The level of control an administrator account has in EFT Server. These roles are pulled from the EFT server and can only be defined in EFT. Please refer to screen shot below.
	Containers	Containers only exist within the Web Admin Tool interface and are a separate control outside of the normal EFT Server. They contain users, roles policies, etc.

To configure the Site

1. On the **Settings** page, click **Authorization**.
2. On the **Authorization** page, click the **Users** tab.
3. In the left pane, click the master admin account, and then click **Grant All Actions**.



4. Click **Logout**, then log back in with the admin account that you just granted all actions to. You should now see all the available buttons on the menu bar.
5. Click **Containers**. In the **Name** box type *SuperAdmin*, then click the plus sign. *SuperAdmin* is a group that you will use for the primary EFT Web Administrator account. Once it is created, select it on the left side. The menu bar for the selected group appears.

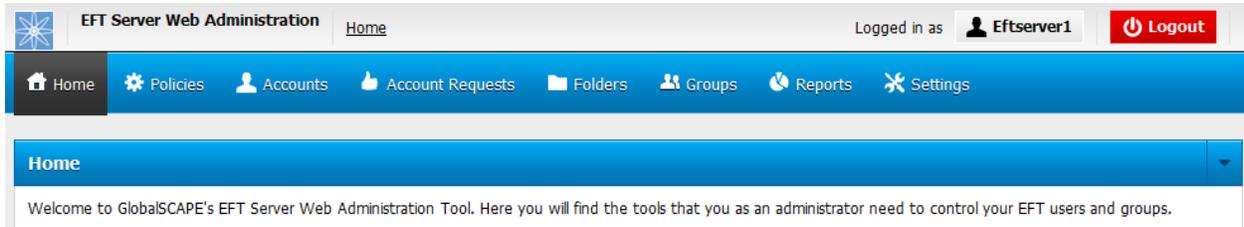


6. Specify which Policies (User Settings Templates), Roles (delegated admins), Users (admin accounts), Groups, FolderPaths, EmailTemplates, and Accounts (user accounts) that you want this *SuperAdmin* to manage. You can **Link** them individually or click **Link All** and then **Unlink** specific resources, if needed.
7. Click **Accounts**, and then click **Link All**. Or you can link only certain items.
8. Click **EmailTemplates**, and then click **Link All**. Or you can link only certain items.
9. Click **FolderPaths**, and then click **Link All**. Or you can link only certain items.
10. Click **Groups**, and then click **Link All**. Or you can link only certain items.
11. Click **Policies**, and then click **Link All**. Or you can link only certain items.

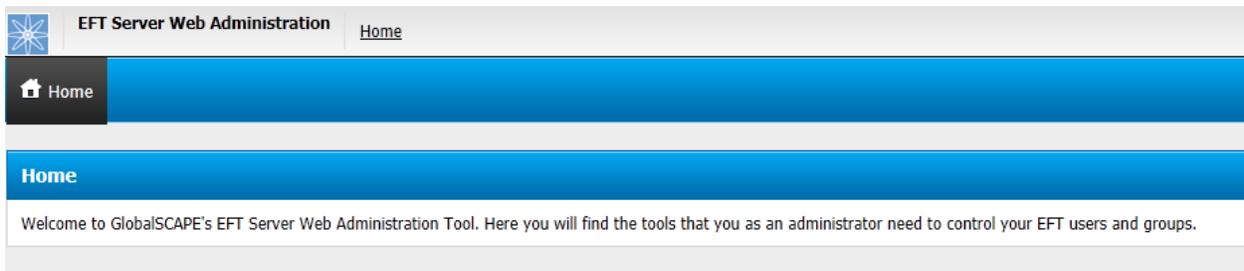
12. Click **Reports**, and then click **Link All**. Or you can link only certain items.
13. Click **Roles**, and then click **Link All**. Or you can link only certain items.
14. Click **Users**, and then click **Link All**. Or you can link only certain items.
15. Log off and back in.

Using the EFT Server Web Administration Interface

When a "Super" administrator logs in to the EFT Server Web Administration interface, all of the features are available:



By default, users will not see any of the features. You must configure permissions for each group and/or user for the items that you want to make available.

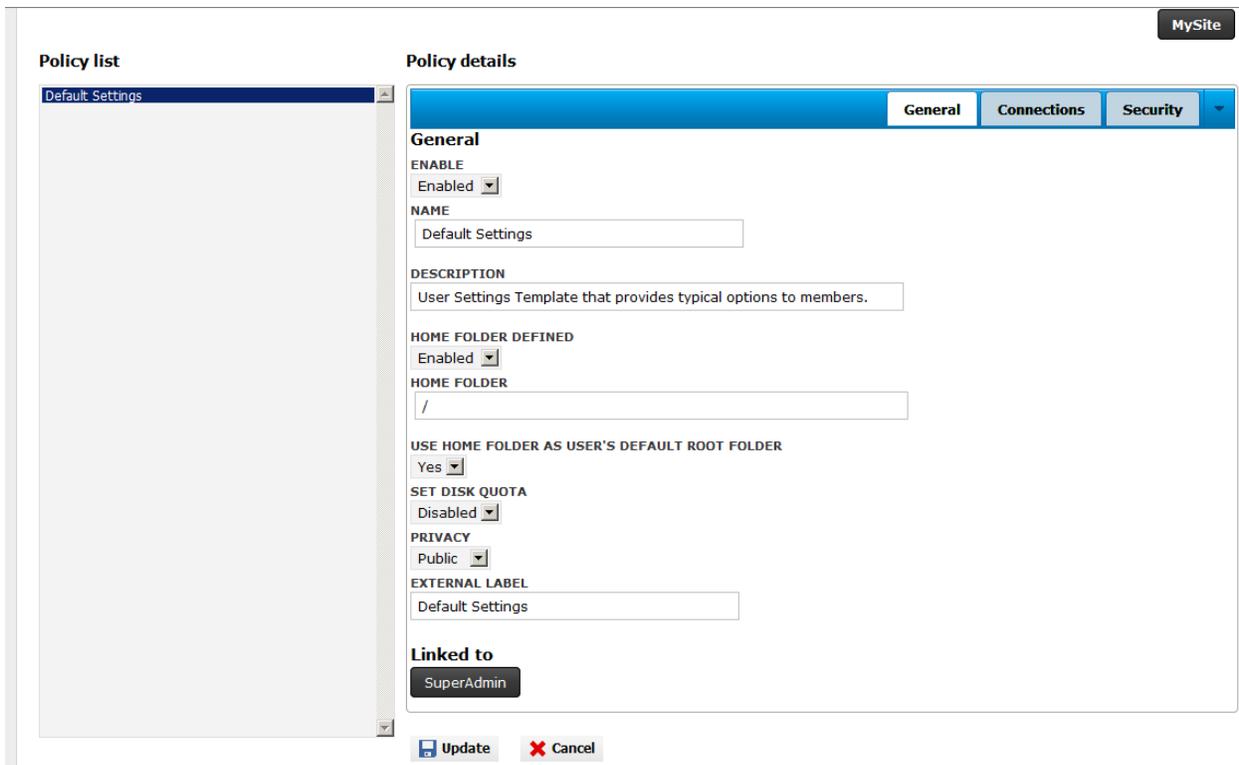


Policies

Polices in the EFT Server Web Administration interface are User Settings Templates in EFT Server. On the **Policies** page, you can create and manage Policies.

To view or edit a Policy

1. Click **Policies**. The **Security Policies** page appears.
2. Click the Site name (e.g., MySite).
3. In the **Policy list**, click the User Settings Template. The **Policy details** appear in the right pane.
4. At the bottom of the **Policy details**, click **Edit**. The fields become editable.



- **ENABLE**—Click the list to enable or disable the Policy.
 - **NAME**—The name of the Policy appears.
 - **DESCRIPTION**—A description of the Policy appears.
 - **HOME FOLDER DEFINED**—Click the list to enable or disable the home folder.
 - **USE HOME FOLDER AS USER'S DEFAULT ROOT FOLDER**—Click the list and then click **Yes** or **No**.
 - **SET DISK QUOTA**—Click the list to enable or disable a disk quota.
 - **PRIVACY**—Click the list and change the setting to **Public**.
 - **EXTERNAL LABEL**—Specify the name that an external customer will see in the drop-down list when requesting access to this Policy.
5. Click **Update** to save changes before clicking another tab.
 6. To view/edit protocols and Web Transfer Client access, click the **Connections** tab.

The screenshot shows a configuration window with three tabs: "General", "Connections", and "Security". The "Connections" tab is active. Below the tabs, the title "Connections" is displayed. Underneath, there are six sections, each with a label and a dropdown menu set to "Enabled":

- FTP ACCESS: Enabled
- FTPS ACCESS: Enabled
- SFTP ACCESS: Enabled
- HTTP ACCESS: Enabled
- HTTPS ACCESS: Enabled
- WEB TRANSFER CLIENT ACCESS: Enabled

7. Click **Edit** to change access, then click **Update** to save changes before clicking another tab.
8. To view the security settings, click the **Security** tab.

General	Connections	Security
---------	-------------	----------

Invalid Login Options

ENABLE INVALID LOGIN OPTIONS
Inherit

INVALID LOGIN SECURITY ACTIONTYPES
Lockout

INVALID LOGIN SECURITY ACTIONTYPES PERIOD (MIN)
30

INVALID LOGIN SECURITY ACTIONTYPES ATTEMPTS
6

INVALID LOGIN SECURITY ACTIONTYPES ATTEMPTS PERIOD (MIN)
5

Account Security

ENABLE ACCOUNT SECURITY
Inherit

ACCOUNT SECURITY ACTIONTYPES
Disable

MAXIMUM DAYS OF INACTIVITY
90

Password Security

ENFORCE STRONG PASSWORDS
Inherit

USERS CAN CHANGE THEIR PASSWORD
Inherit

FORCE USERS TO CHANGE THEIR FIRST TIME PASSWORD IMMEDIATELY UPON FIRST USE
No

ENABLE PASSWORD EXPIRATION
Enabled

PASSWORD EXPIRATION DAYS
5

ENABLE PASSWORD EXPIRATION REMINDER
Enabled

PASSWORD EXPIRATION REMIND DAYS
99

SEND USER AN EMAIL PRIOR TO EXPIRATION
Disabled

SEND USER AN EMAIL UPON EXPIRATION
Enabled

ENABLE PASSWORD HISTORY
Inherit

PASSWORD HISTORY SIZE
4

9. Click **Edit** to change access, then click **Update** to save changes before clicking another tab.

Accounts

The **Accounts** page displays the user/client accounts defined on EFT Server. You can also create a new account on this page.

To view edit a user/client account

1. Click the account in the **Accounts** list. The right pane displays the **Account** details.

Account list | **Account details**

imauser

General | **Details** | **Connections** | **Membership** | **Security**

General

SETTINGTEMPLATE
Default Settings ▾

ENABLE
Enabled ▾

USERNAME
imauser

PASSWORD:
Change Password

EMAIL

EXPIRATION

FULL NAME

HOME FOLDER DEFINED
Enabled ▾

HOME FOLDER
/Usr/imauser/

USE HOME FOLDER AS USER'S DEFAULT ROOT FOLDER
Yes ▾

SET DISK QUOTA
Inherit ▾

Linked to
SuperAdmin

Update **Cancel**

2. Click **Edit** to make changes to the account; click **Update** to save the changes.
 - **General**—Settings template, password, home folder, and so on can be viewed/edited on this tab.
 - **Details**—The account name, phone, email, and so on can be viewed/edited on this tab.
 - **Connections**—The allowed protocols and WTC access can be enabled, disabled, or inherited on this tab.
 - **Membership**—The Groups to which this account is a member can be viewed/edited on this tab.
 - **Security**—Invalid login options, account security, and password security settings can be viewed/edited on this tab.

Account Requests

External customers can request access to the system via the **Account Access** form at <http://siteroot/ext/default.aspx>.

The screenshot shows the 'Account Access' form in the g!balsCAPE interface. The form includes the following fields: FULL NAME, EMAIL, CONFIRM EMAIL, COMPANY, PHONE, ACCESS TO (a dropdown menu), and REASON (a text area). A 'Submit Request' button is located at the bottom of the form. The g!balsCAPE logo and tagline 'File Transfer Made Easy' are visible at the top left of the interface.

The customer can request access to a specific Policy (User Settings Template) via the **Access To** list on the form. (By default, Policies are not displayed. You must specifically change the settings of a Policy in order for it to be available in this list.)

- When the form is received, the request appears on the **Account Requests** page on the **Pending** tab.

The screenshot shows the 'Account Requests' page in the g!balsCAPE interface. The page has a blue header with the title 'Account Requests'. Below the header, there are tabs for 'Pending (1)', 'Approved (0)', 'Denied (0)', 'All (1)', 'All', 'My Second Site', and 'My Site 1'. The 'All' tab is currently selected. Below the tabs, there are buttons for 'Approve', 'Deny', 'Actions...', 'Apply', and 'Filter'. An 'Invite' button is also visible. Below the buttons, there is a table with the following columns: Timestamp, Email, FullName, Company, Phone, Name, EFTAccount, Reason, and Status. The table contains one row of data for a pending request.

	Timestamp	Email	FullName	Company	Phone	Name	EFTAccount	Reason	Status
Select	1/14/2013 9:14:44 AM	john@doe.com	John Doe	gsb	1234	Default Settings		I wish to have access to My Test Label so that I can upload files to this FTP.	

External Account Request URL Setting: <http://localhost:56740/Ext/default.aspx>

- After you click **Approve**, the request appears on the **Approved** tab.

Account Requests

Pending (0) Approved (1) Denied (0) All (1) **All** My Second Site My Site 1

Approve Deny Actions... Apply Filter Invite

	Timestamp	Email	FullName	Company	Phone	Name	EFTAccount	Reason	Status
Select	1/14/2013 9:14:44 AM	john@doe.com	John Doe	gsb	1234	Default Settings		I wish to have access to My Test Label so that I can upload files to this FTP.	✓

i External Account Request URL Setting: <http://localhost:56740/Ext/default.aspx>

- If you click **Deny**, the request appears on the **Denied** tab.
- Using the **Actions** drop-down list, you can delete requests.
- If you have multiple requests displayed, you can filter the display by typing a string and then clicking **Filter**.

Inviting External Customers

If external customers have been preapproved access to your EFT Server, you can send them invitations. This will send an email to the customer letting them know they have been preapproved for an account on your EFT Server.

To send an invitation

1. Log in to the EFT Server Web Administration interface.
2. Click **Account Requests**. The **Account Requests** page appears.

Home Policies Accounts **Account Requests** Folders Groups Reports Settings

Account Requests

Pending (0) Approved (0) Denied (0) All (0) **All** MySite

Approve Deny Actions... Apply Filter Invite

No Account Request Found

i External Account Request URL Setting: <http://localhost:56740/Ext/default.aspx>

3. Click **Invite**. The **Send an Invite to Create an Account** dialog box appears.

Send An Invite To Create An Account X

Send pre-approved invite(s) to recipient to create accounts

SELECT DEFAULT POLICY

FULL NAME

EMAIL RECIPIENT

Send Invite **Cancel**

4. In the **Select Default Policy** list, click or type the name of the Policy to which this user will have access.
5. In the **Full Name** box, type the user's first and last name.
6. In the **Email Recipient** box, type the user's email address.
7. Click **Send Invite**.

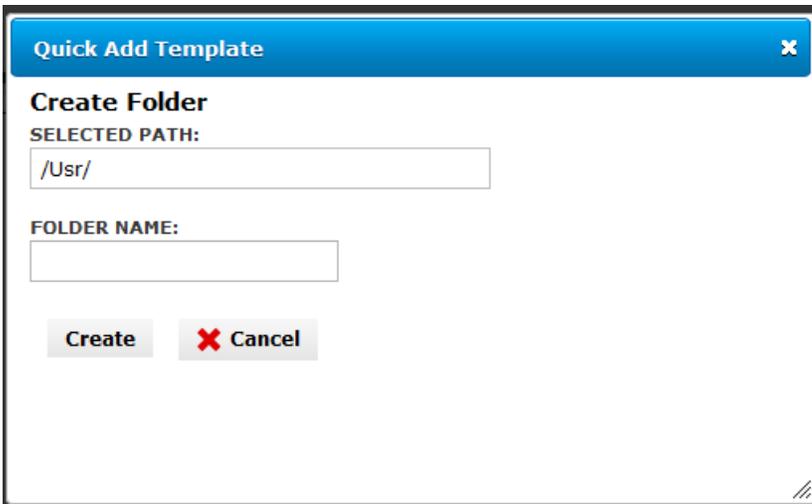
Folders

The **Folders** page is similar to the **VFS** tab in EFT Server. The **Folders list** displays the VFS folders of the selected Site. The **User and Groups details** list displays the users and Groups defined on the **Permissions** tab of the VFS in EFT Server. On the **Folders** page, the **Permissions** area displays permissions of a selected user or Group. **Share Folder** allows you to create a virtual folder under the user's home folder to the selected path. In the **Folders** area, the folders defined on the Site appear. You can create new folders, delete folders, and share folders.

The screenshot shows the EFT Server interface for the 'Folders' page. At the top is a navigation bar with icons for Home, Policies, Accounts, Account Requests, Folders (selected), Groups, Reports, and Settings. Below this is a 'Folder System' header with a 'MySite' button. The main content area is divided into three sections: 'Folders', 'User and Group details', and 'Permissions'. The 'Folders' section has buttons for 'Create Folder', 'Share Folder', and 'Delete', and shows a tree view of folders including '[Site Root]', 'Bin', 'Incoming', 'Pub', 'Usr', and 'imauser'. The 'User and Group details' section has buttons for 'Add', 'Reset Inheritance', and 'Remove', and lists users: 'Administrative', 'All Users', 'Guests', and 'imauser'. The 'Permissions' section has a dropdown for 'Inherit Permissions and settings from', a list of permissions (Upload, Download, Delete, Rename, Append, Delete Folder, Create Folder), a 'Content' section (Show hidden, Show read only, Show this folder in parent, Show files and folders in list), and an 'Edit' button.

To create a new folder

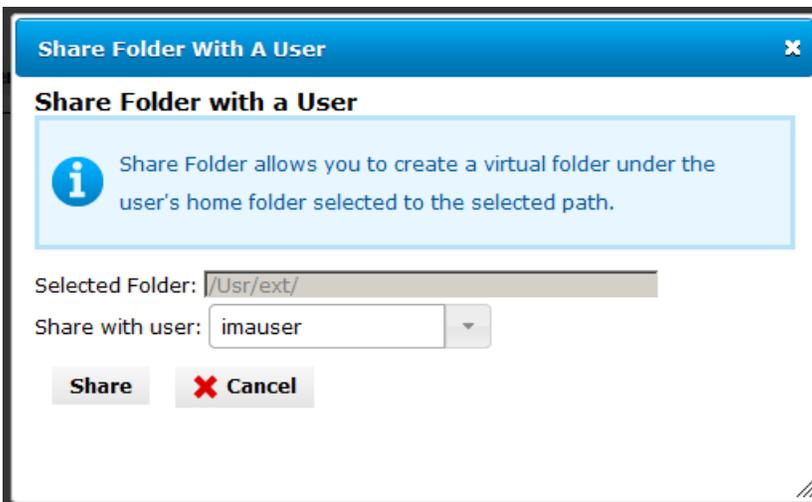
1. Click a folder in the list under which you want to add the new folder, then click **Create Folder**. The **Create Folder** dialog box appears.



2. Type a name for the new folder (no slashes), then click **Create**. Refresh the page to see the new folder.

To share a folder

1. In the **Folders** list, click the folder you want to share, then click **Share Folder**. The **Share Folder with User** dialog box appears. The folder path appears in the **Selected Folder** box.



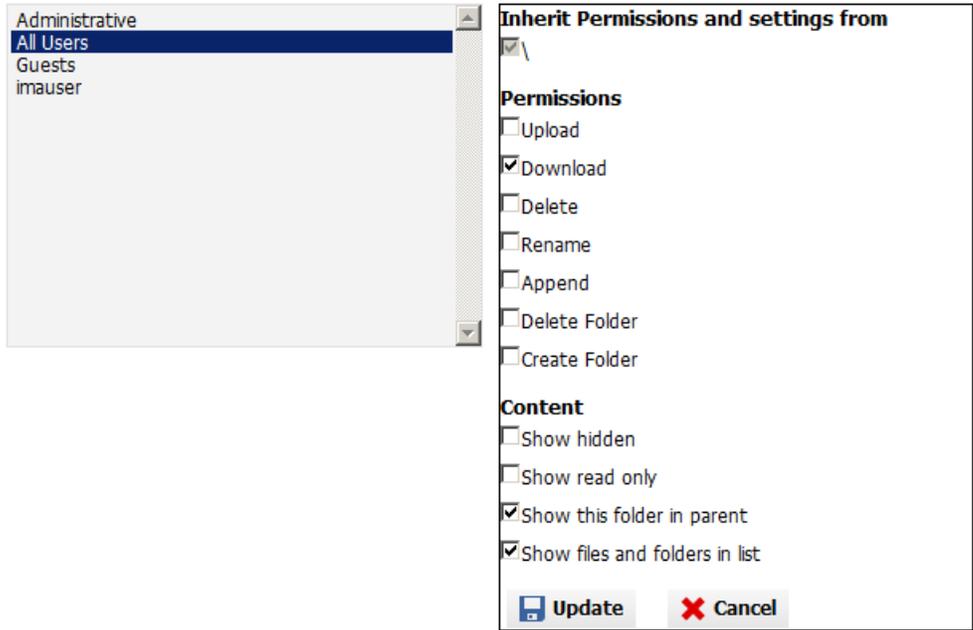
2. In the **Share with user** list, selected the user you want to share the folder with, then click **Share**. A virtual folder is created under the user with which you shared the folder.

To delete a folder

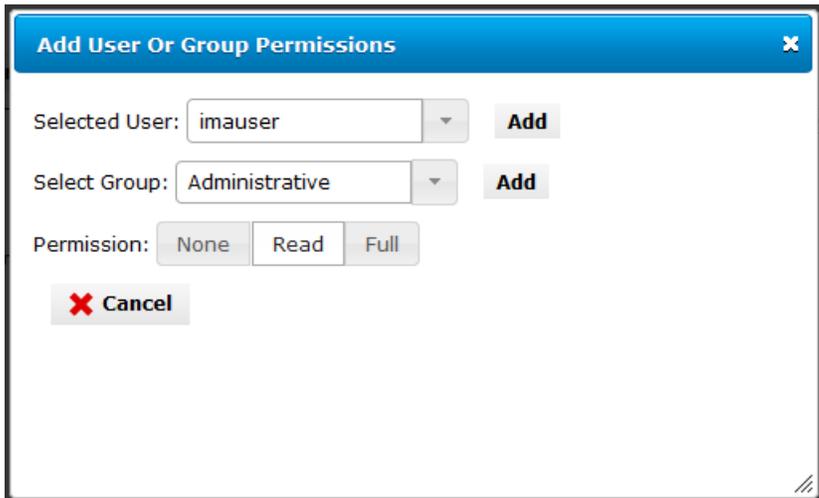
- Click the folder, then click **Delete**.

To add or reset user and Group permissions

1. In the **User and Group details** area, the Groups defined on EFT Server are listed. You can add new permission Groups and reset inheritance. Click a user or Group in the **User and Group details** area. The selected user's or Group's permissions appear in the **Permissions** area.



2. To edit permissions, click **Edit**, select or clear the applicable check box, then click **Update**.
3. To add a user or Group to set their permissions, click **Add**. The **Add User or Group Permissions** dialog box appears.



4. Select the user or Group, then click **Add**. The user or Group appears in the **User and Group details** area. Then you can click it to define its permissions.
5. To reset inheritance settings, click the user or Group, then click **Reset Inheritance**.

Groups

The **Groups** page displays the Groups defined in EFT Server, and displays which users are a member of each Group.

The screenshot shows the 'Groups' management page. At the top is a navigation bar with icons for Home, Policies, Accounts, Account Requests, Folders, Groups (selected), Reports, and Settings. Below the navigation bar is a blue header with the word 'Groups' and a 'MySite' button on the right. The main content area is divided into two panes. The left pane, titled 'Group List', contains a list of groups: 'Administrative', 'All Users' (highlighted), and 'Guests'. The right pane, titled 'Group details', shows the 'General' tab for the 'All Users' group. It includes a 'NAME' field containing 'All Users', a 'Users' list box, and a 'Linked to' section with a 'SuperAdmin' button. Below the 'Linked to' section are 'Update' and 'Cancel' buttons. The 'Users' list box is empty, and the 'Linked to' section is also empty.

To manage Group membership

1. Click a Group in the **Group List**. The **Group details** appear in the right pane.
2. Click **Edit**. The **Group details** become editable.
3. Click a user in the left pane, then click the right-facing arrow to add it to the Group.
4. Click a user in the right pane, then click the left-facing arrow to remove it from the Group.
5. Click **Update** to save the changes.

Reports

The **Reports** tab displays the report templates defined in EFT Server which you can use to generate and export reports.

Home Policies Accounts Account Requests Folders Groups Reports Settings

Reports

MySite

Report List

- PCI DSS Compliance Report
- Activity - All File Transfers
- Activity - All File Transfers (as Server)
- Activity - All Groups (Detailed)

Report

Filter By:

Report Date Range

From: To:

Show Export PDF

To generate and export a report

1. In the **Reports List**, click the report you want to generate.
2. In the **Filter By** box, specify any applicable filters, such as IP address. This field is optional.
3. In the **Report Date Range** boxes, specify the **From** and **To** dates for the report. When you click in the **From** and **To** boxes, a calendar appears on which you can click a day.
4. Click **Show**. The report is displayed in the browser.
5. To export the report, click **Export PDF**.

Settings

The **Settings** tab is where you manage access to the Web Administration interface, as you did when you installed and configured the interface. The **Settings** tab contains the following sub tabs:

- **Settings**—Displays Application and Database status, and allows you can specify or change the SQL Server connection string. In the **Application Settings** area, on the **App Settings** tab, you can view/edit the database version, default email, external URL, and maximum event history.

Application Status

Database Status

- [OK] EFT Web Admin connection
- [OK] EFT Web Admin schema

Application Status

Application version: **2.0.0.0**

Application Settings Connections App Settings

WEB ADMIN (SQL SERVER CONNECTION STRING):

Data Source=.\GLOBALSCAPE;Initial Catalog=EFTWebadmin;Trusted_Connection=true

Test Connection **Test Schema** **Initialize Schema**

SQL Connection String Format:

Data Source=SERVERNAME\INSTANCENAME;Initial Catalog=DATABASENAME;Persist Security Info=True;User ID=USERNAME;Password=PASSWORD

Samples:

Data Source=.\GLOBALSCAPE;Initial Catalog=EFTWebAdm;Persist Security Info=True;User ID=eftadmin;Password=eftadmin

Data Source=192.168.10.1;Initial Catalog=EFTWebAdm;Persist Security Info=True;Trusted_Connection =True

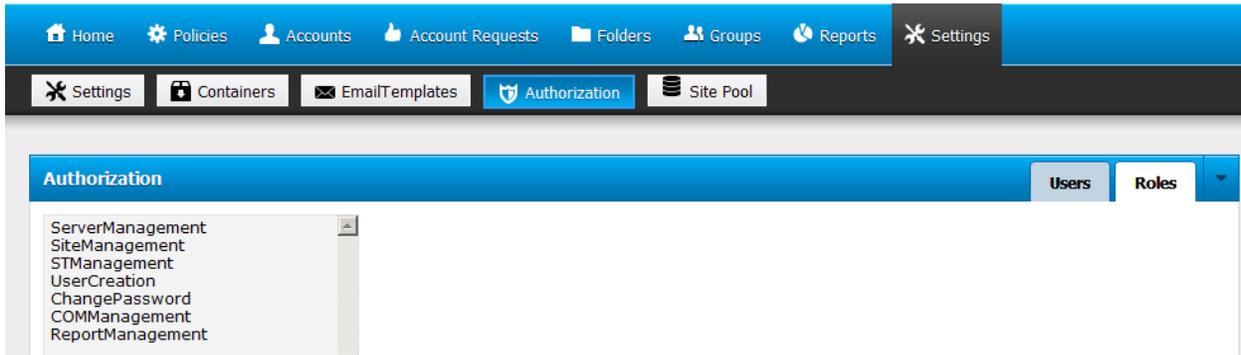
Save Settings

- **EmailTemplates**—Email templates provide the text and formatting of emails that are sent on behalf of EFT Server for account creation, account request, password changed, and so on.
- **Authorization**—The **Authorization** tab (Home > Settings > Authorization) determines which functions of the EFT Server Web Administration interface users will be allowed to see and do.

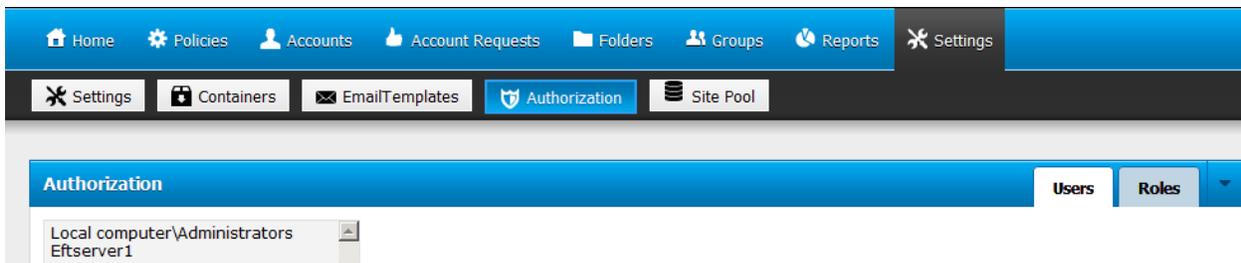
For example, if you want a user administrator to view accounts and change account passwords, but not allow them to delete or create accounts, then you would have to grant access to display the **Accounts** menu item and the Accounts detail, and then grant access to change passwords.

Authorization can be given per user or based on **Roles**. If you made the same Accounts authorization changes from above on a Role rather than a specific user, then every user that is in that specific Role would be granted access to change account passwords.

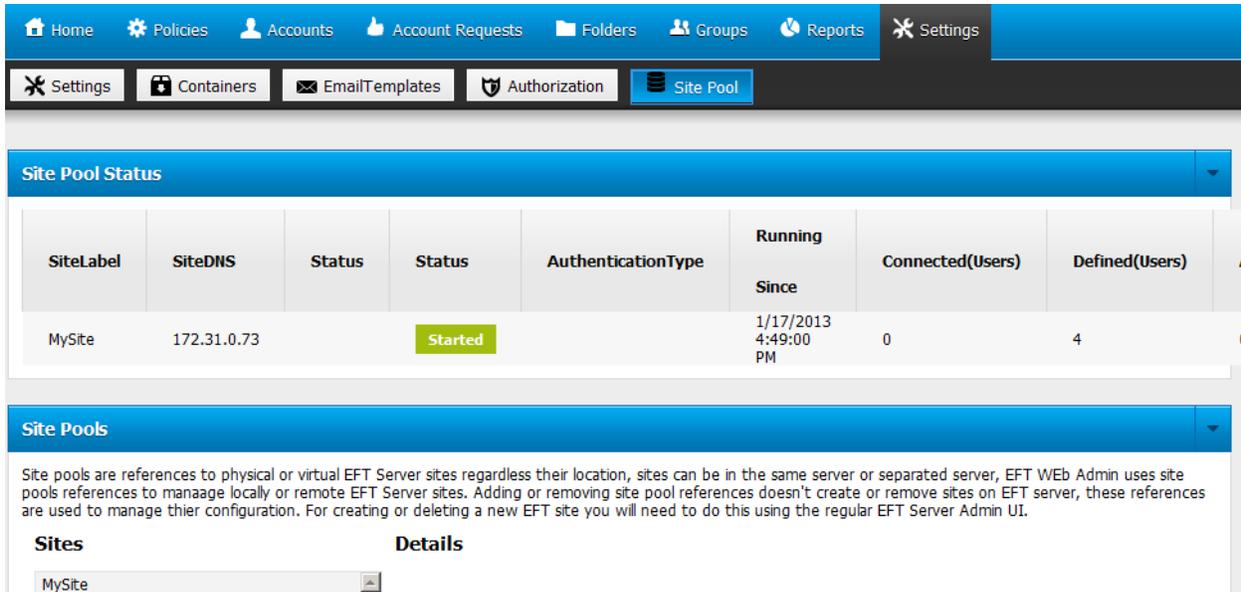
- The **Roles** tab of the **Authorization** page displays the delegated administrators categories.



- The **Users** tab of the **Authorization** page displays the administrator accounts defined on EFT Server.



- **Site Pool**—The **Site Pool** tab displays the status of each Site, including how many users are connected to the Site.



- **Containers**—Containers define which data from EFT Server a user is able to see.

Containers

On the **Containers** page, there are several tabs: **Accounts** (user/client accounts), **EmailTemplates**, **FolderPaths** (VFS), **Groups** (permissions), **Policies** (User Settings Templates), **Reports**, **Roles** (delegated administrator categories), and **Users** (administrator user accounts). You create a "Container" and then link items to the Container that you want to have access to that item.

For example, suppose you have already granted a user authorization to the **Policies** tab, but they do not see any Policies. You have three User Settings Templates in EFT Server, named "HR," "Marketing," and "Accounting." You only want this particular user from HR to have access to accounts related to HR. You would create a container for HR and link the Policy named "HR" to that Container. The user will also need to be added into this Container. When the user and the Policy are in the same container, when the user logs in and clicks the **Policy** tab, they will have access to the "HR" Policy, but will not see the "Marketing" or "Accounting" Policies.

The Authorization settings and the Containers must both be configured properly in order for the EFT Server Web Administration interface to work with your desired results.

Be careful with the **Link All** button under the **Containers** tab—by clicking **Link All**, it is possible to give someone access to the entire system, which may not be what you want to do.

Accounts

On the **Accounts** tab, you can link the user accounts to the Container.

The screenshot shows the 'Accounts' tab selected in the 'Containers' section. The navigation bar includes Home, Policies, Accounts, Account Requests, Folders, Groups, Reports, and Settings. Below the navigation bar, there are tabs for Settings, Containers, EmailTemplates, Authorization, and Site Pool. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'Accounts' as the selected tab, with other tabs like EmailTemplates, FolderPaths, Groups, Policies, Reports, Roles, and Users. Below the dropdown, there is a 'MySite' button and a search field containing 'imauser'. To the left, a list of 'External Users' includes HR and SuperAdmin. To the right, there are buttons for 'Link', 'Link All', 'Unlink', and 'Unlink All'. Below this, a table lists linked accounts:

Type	Resource Name	Unlink
	imauser2	Unlink
	imauser3	Unlink

EmailTemplates

On the **EmailTemplates** tab, you can link the templates to the Container.

The screenshot shows the 'EmailTemplates' tab selected in the 'Containers' section. The navigation bar and secondary tabs are the same as in the previous screenshot. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'EmailTemplates' as the selected tab, with other tabs like Accounts, FolderPaths, Groups, Policies, Reports, Roles, and Users. Below the dropdown, there is a 'MySite' button and a search field containing 'Account Creation Invi'. To the left, a list of 'External Users' includes HR and SuperAdmin. To the right, there are buttons for 'Link', 'Link All', 'Unlink', and 'Unlink All'. Below this, a table lists linked email templates:

Type	Resource Name	Unlink
	Account Creation Invitation	Unlink
	Account Request Approval	Unlink
	Account Request Approved	Unlink
	Account Request Denied	Unlink
	Account Requested	Unlink
	Password Changed	Unlink

FolderPaths

On the **FolderPaths** tab, you can link folder paths to the Container.

The screenshot shows the 'Containers' management interface with the 'FolderPaths' tab selected. A green success message at the top states 'Success Resource has been linked'. The interface includes a navigation bar with 'Home', 'Policies', 'Accounts', 'Account Requests', 'Folders', 'Groups', 'Reports', and 'Settings'. Below this is a secondary navigation bar with 'Settings', 'Containers', 'EmailTemplates', 'Authorization', and 'Site Pool'. The main content area features a 'Name' input field with a '+' icon, a 'MySite' dropdown, and a list of folder paths. The first path is '/', with a 'Link' button. Below this is a table with columns 'Type' and 'Resource Name'. The table contains one row with a folder icon, '/', and an 'Unlink' button.

Type	Resource Name	
	/	Link
	/	Unlink

Groups

On the **Groups** tab, you can link one or more Groups to the Container.

The screenshot shows the 'Containers' management interface with the 'Groups' tab selected. The navigation bars are identical to the previous screenshot. The main content area features a 'Name' input field with a '+' icon, a 'MySite' dropdown, and a list of groups. The first group is 'Administrative', with 'Link', 'Link All', 'Unlink', and 'Unlink All' buttons. Below this is a table with columns 'Type' and 'Resource Name'. The table contains one row with a group icon, 'External Users', and an 'Unlink' button.

Type	Resource Name	
	External Users	Link Link All Unlink Unlink All
	External Users	Unlink

Policies

On the **Policies** tab, you can link one or more Policies to the Container.

The screenshot shows the 'Policies' tab selected in the 'Containers' management interface. The top navigation bar includes 'Home', 'Policies', 'Accounts', 'Account Requests', 'Folders', 'Groups', 'Reports', and 'Settings'. Below this, a secondary navigation bar highlights 'Containers', 'EmailTemplates', 'Authorization', and 'Site Pool'. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'MySite' as the selected container. Below the container name, a list of resources is displayed. The first resource is 'Default Settings', which is currently selected. It has a 'Link' button, a 'Link All' button, an 'Unlink' button, and an 'Unlink All' button. The second resource is 'External Users', which has an 'Unlink' button. The table below the resources has columns for 'Type' and 'Resource Name'.

Type	Resource Name	Link	Link All	Unlink	Unlink All
	Default Settings	Link	Link All	Unlink	Unlink All
	External Users			Unlink	

Reports

On the **Reports** tab, you can link one or more Reports to the Container.

The screenshot shows the 'Reports' tab selected in the 'Containers' management interface. The top navigation bar includes 'Home', 'Policies', 'Accounts', 'Account Requests', 'Folders', 'Groups', 'Reports', and 'Settings'. Below this, a secondary navigation bar highlights 'Containers', 'EmailTemplates', 'Authorization', and 'Site Pool'. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'MySite' as the selected container. Below the container name, a list of reports is displayed. The first report is 'PCI DSS Compliance R', which is currently selected. It has a 'Link' button, a 'Link All' button, an 'Unlink' button, and an 'Unlink All' button. The second report is 'Activity - By User (Detailed)', which has an 'Unlink' button. The table below the reports has columns for 'Type' and 'Resource Name'.

Type	Resource Name	Link	Link All	Unlink	Unlink All
	PCI DSS Compliance R	Link	Link All	Unlink	Unlink All
	Activity - By User (Detailed)			Unlink	

Roles

On the **Roles** tab, you can link one or more Roles to a Container.

The screenshot shows the 'Roles' tab selected in the 'Containers' section. The navigation bar includes Home, Policies, Accounts, Account Requests, Folders, Groups, Reports, and Settings. Below the navigation bar, there are tabs for Settings, Containers, EmailTemplates, Authorization, and Site Pool. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'MySite' and a search box containing 'ServerManagement'. Below the search box, a list of roles is displayed: 'External Users', 'HR', and 'SuperAdmin'. To the right of the list, there are four buttons: 'Link', 'Link All', 'Unlink', and 'Unlink All'. A message below the list states 'No resource(s) were found.'

Users

On the **Users** tab, you can link or more administrator accounts to the Container.

The screenshot shows the 'Users' tab selected in the 'Containers' section. The navigation bar includes Home, Policies, Accounts, Account Requests, Folders, Groups, Reports, and Settings. Below the navigation bar, there are tabs for Settings, Containers, EmailTemplates, Authorization, and Site Pool. The main content area is titled 'Containers' and features a 'Name' field with a plus sign. A dropdown menu is open, showing 'MySite' and a search box containing 'Local computer\Admin'. Below the search box, a list of users is displayed: 'External Users', 'HR', and 'SuperAdmin'. To the right of the list, there are four buttons: 'Link', 'Link All', 'Unlink', and 'Unlink All'. A message below the list states 'No resource(s) were found.'