Secure Transport

User Guide

Dovenmuehle

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DMI Secure Transport

Overview

DMI Secure Transport is a product that offers a robust solution for file transfer. It's a secure managed file transfer solution that lets our clients manage the exchange of large and sensitive data files, meet security government standards and reduce risk.
Supports the exchange of files and data between servers, systems and applications using a common shared folder with simple browser access for users. Ease of access and secure file transfer that meets or exceeds our client's security and compliance requirements.
The user is authenticated by the following factors:

- IP source (Client's Public IP Gateway)
- User Private Certificate (TLS,SSH Key)
- User Credential (User ID/Password)

The protocols to access our solution server are:

- HTTPS (Web Browser)
- FTPS (FTP Client Software with TLS support)
- SFTP (FTP Client Software with SSH support)

Contact DMI HelpDesk Support

Our support specialists will assist with any question or technical request. For compliance and security reasons, please contact us directly by emailing: **helpdesk@dmicorp.com** or going to **URL: https://support.dmiconnect.com**
Some examples of services that must be requested by the client or user:

- New User Account
- Add or modify Client's Public IP Gateway
- Add or modify User's Certificate
- Reactivate Account
- Set up a S2S (Server to Server) account

1

Get Started

Account Credentials Management Policies

The credentials must be requested directly by the user or by the client's administrator.
Every user must have their own credentials without sharing with other client's employees.
The account will be subject to **expiration due to inactivity** if not used for ***more than sixty-eight(68) days***. Reactivation must be requested through the DMI HelpDesk.
Accounts will be deleted from the system if not used in 365 days. Restoration of the credentials may take up to **three (3) business days to process**.

Supported Operating Systems and Web Browsers

DMI Secure Transport is supported on all currently supported Microsoft operating systems. Other operating system capable of using personal certificates and TLS transport may also work, but only Windows platforms are officially supported.
You may not be able to connect to *DMI Secure Transport* server, if the computer which will be used to access has any software which interferes with the normal operation of the *Windows Certificate Store*.
Our HelpDesk support specialist will work with you to resolve any connectivity or authentication problems. However, your IT support department is the first choice to resolve any problem as we cannot implement any changes to client computers.
When the numbers of files or the size of the files are small, web browsers allows users to access to *DMI Secure Transport* using HTTPS and navigate via HTML web pages, without the need to use an FTP Client Software.
The DMI Secure Transport supports the following major browsers:

- Microsoft Internet Explorer (IE) All currently supported versions (on Windows only)
    - when using Upload/Download Wizard (ActiveX or Java)
- Google Chrome latest version (on Windows only)
    - When using MOVEit Upload/Download Wizard (Java – Windows/*nix/Mac OS X)
- Mozilla Firefox (FF) 3.6, 4.x, and 5.0 (on Windows, Macintosh and RedHat Linux)
    - when using Upload/Download Wizard (Java - Windows/*nix/Mac OS X)

Other browser maybe capable but they are not officially supported.

Request Credentials

You can request a new account by sending an email to the DMI HelpDesk Support at helpdesk@dmicorp.com or going to URL https://support.dmiconnect.com.
You must include in the request for every account the following information:

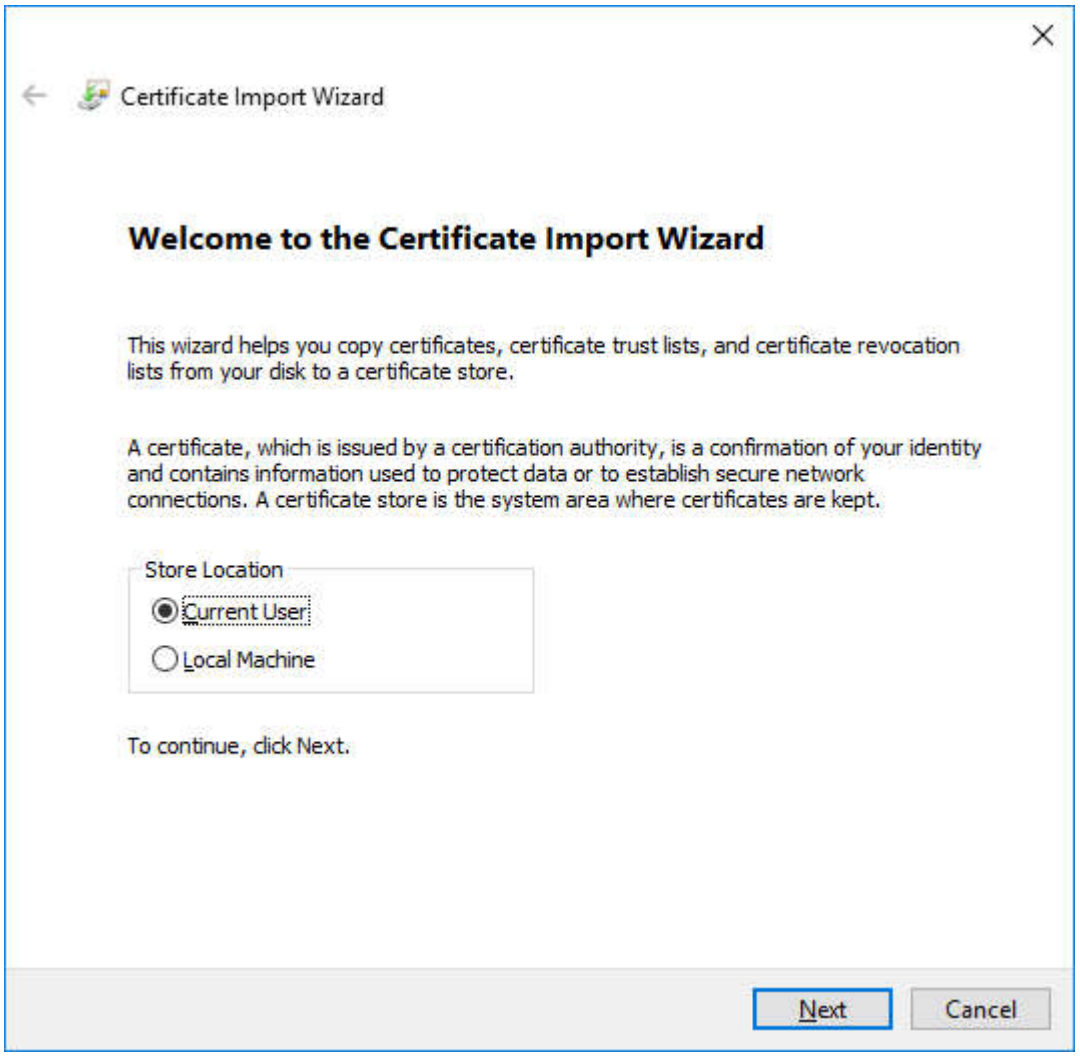
- Name
- Email address
- Contact phone number
- Company Name

Your DMI Client Manager will authorize your request. We will process your request as soon as possible, but please be aware that this process can take three (3) business days.

Install User Certificate on Windows

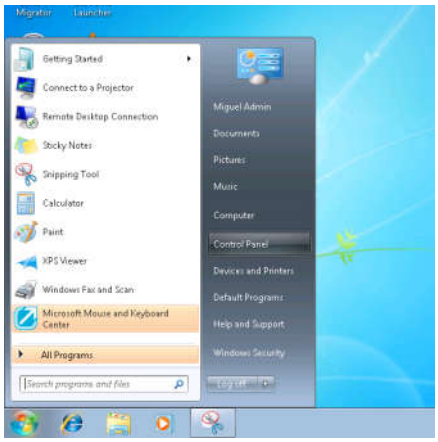
Follow this steps to install the certificate that was sent to you by email:

STEP 1. Double click the certificate .pfx file, and the **Certificate Import Wizard** will start.
Then click on Next

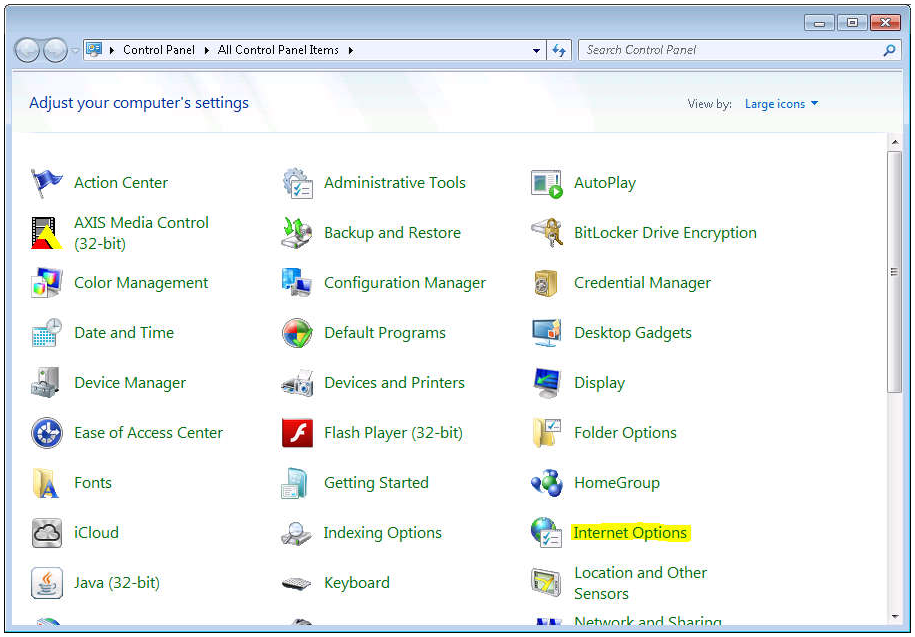


If the Certificate Import Wizard doesn't start, you can try the following steps:
Skip to STEP 6 otherwise

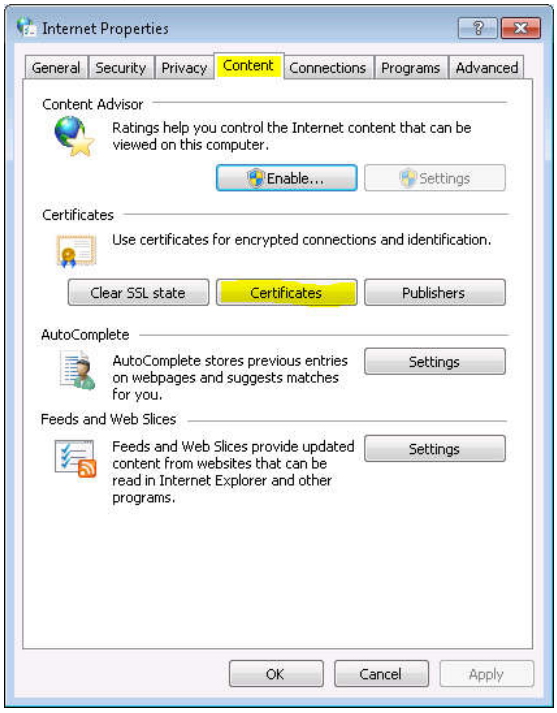
STEP 2. Open the **Control Panel** with the start button



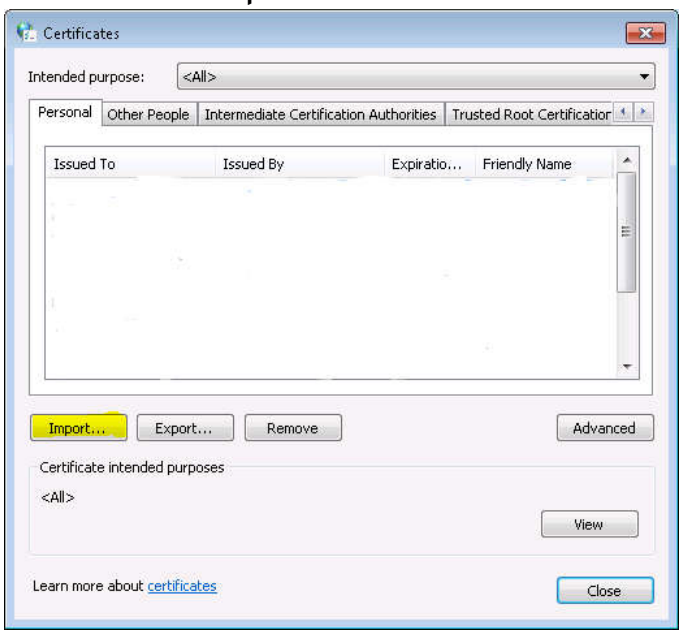
STEP 3. Click on Internet Options.



STEP 4. Open the **Content** tab and click on **Certificates.**

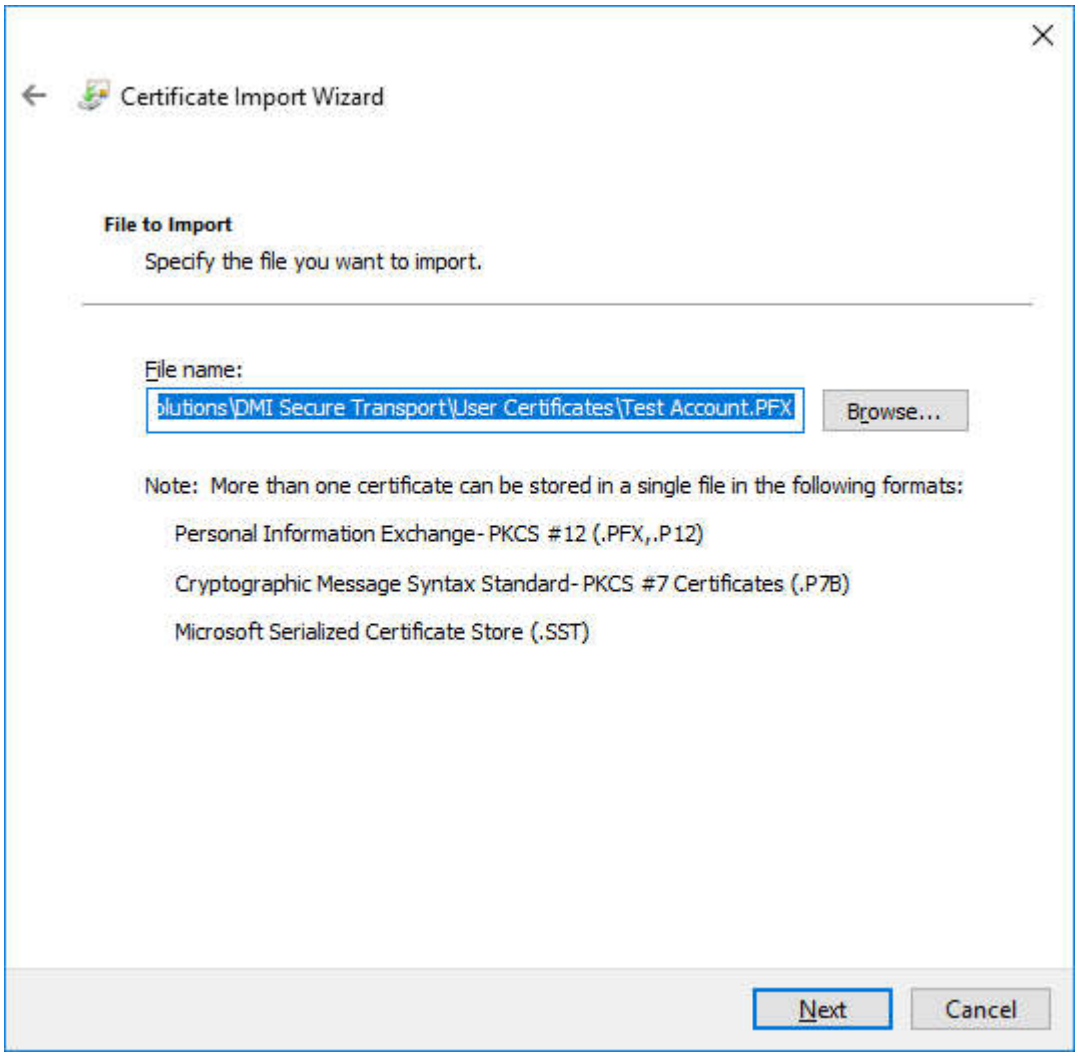


STEP 5. Click on **Import.**

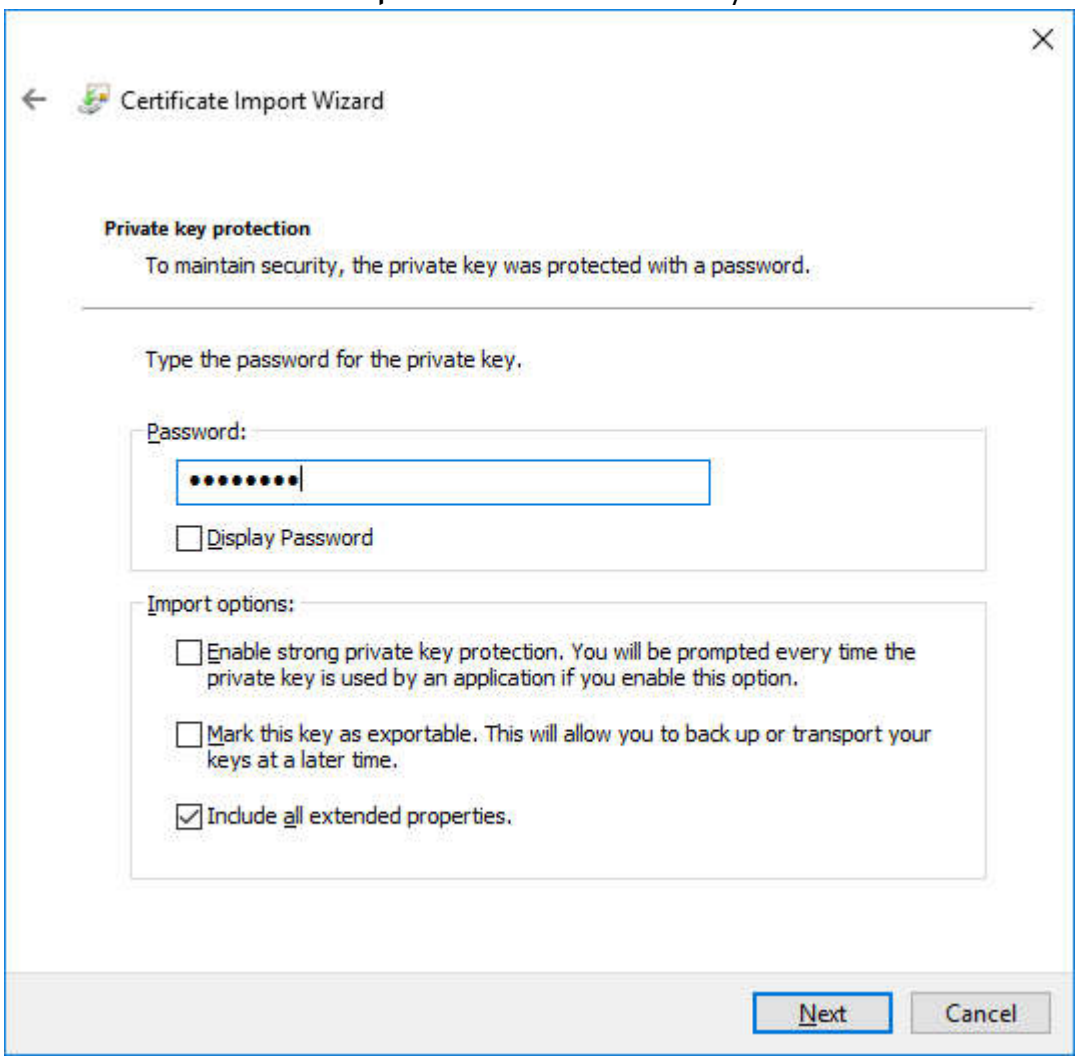


Note: If you get an error or permission notice and cannot complete this step, please see your IT department. It is possible that you will not have the appropriate security permissions to proceed any further.

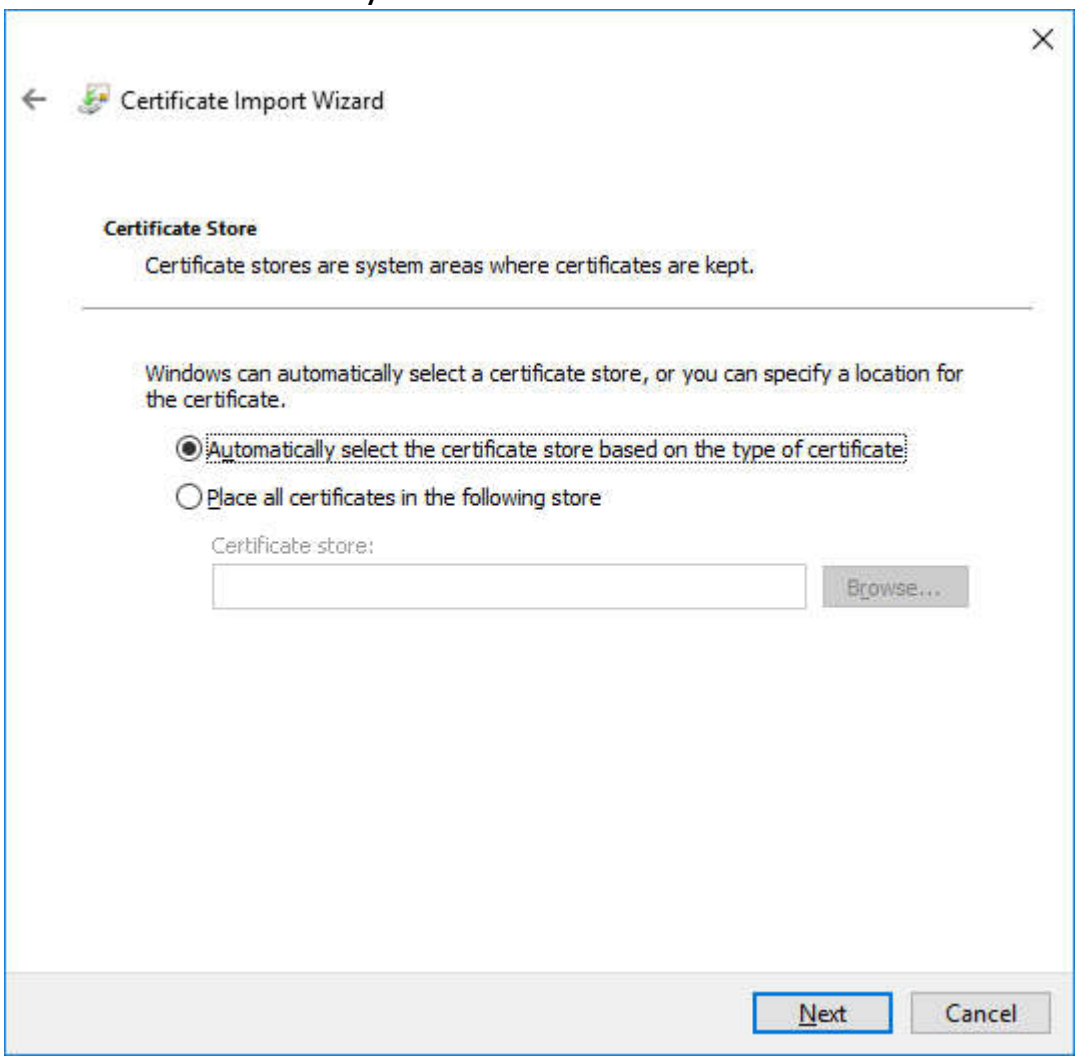
STEP 6. If the file name is not selected click on **Browse…** to find the file, then click on **Next**.



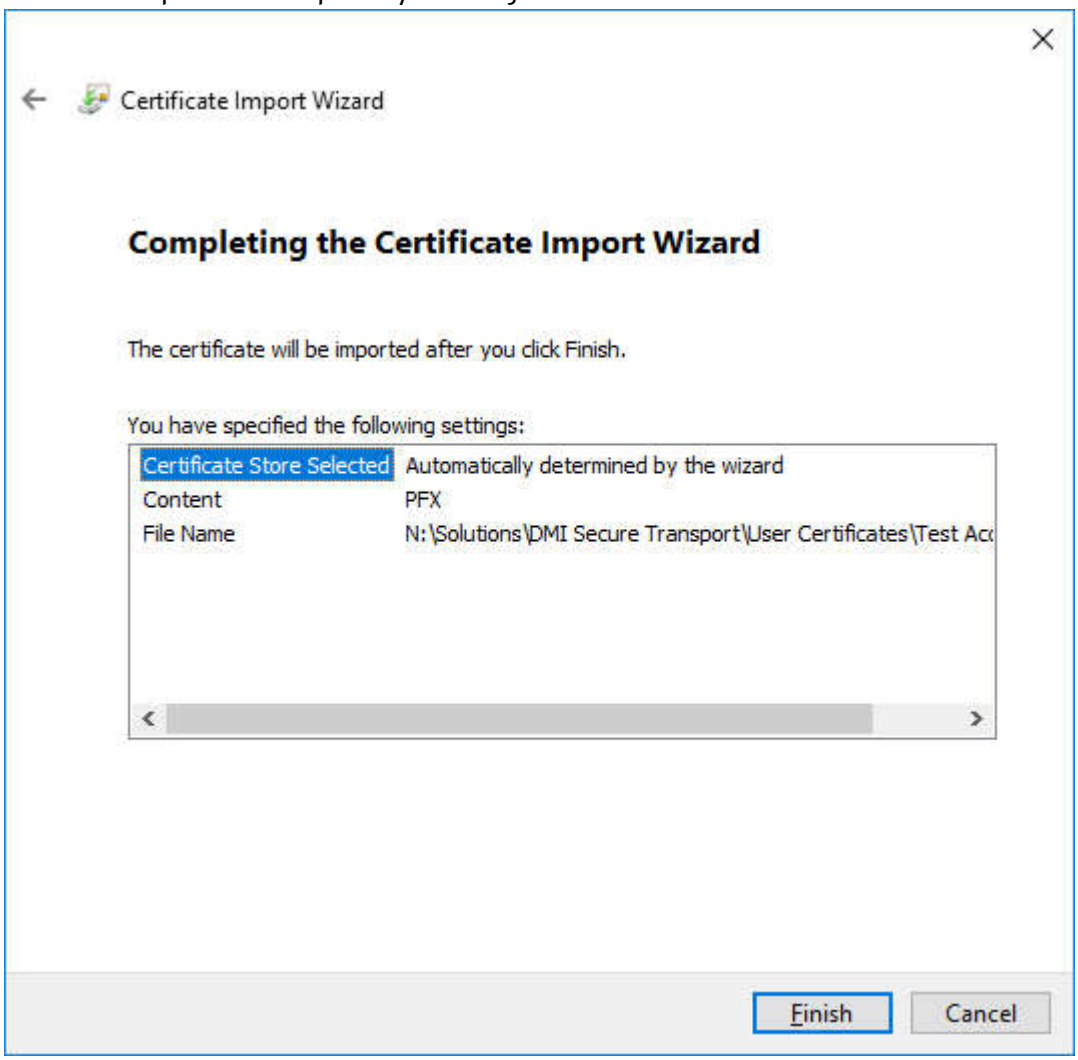
STEP 7. Enter the **certificate password** that was sent to you in an email. Then click **Next**.



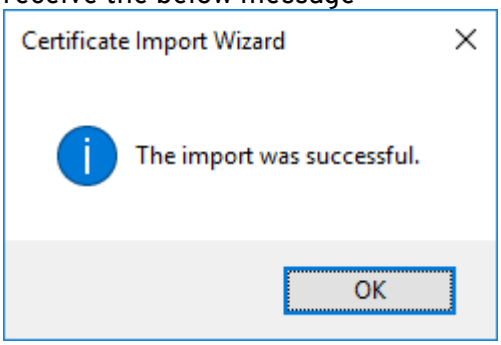
STEP 8. Select **Automatically** and click **Next.**



STEP 9. Complete the import by clicking on **Finish.**



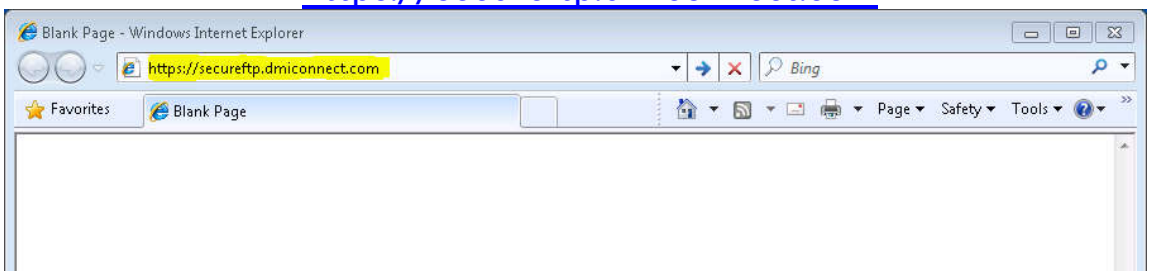
At this point you have imported the certificate in the Windows Certificate Storage and you will receive the below message



Login at DMI Secure Transport

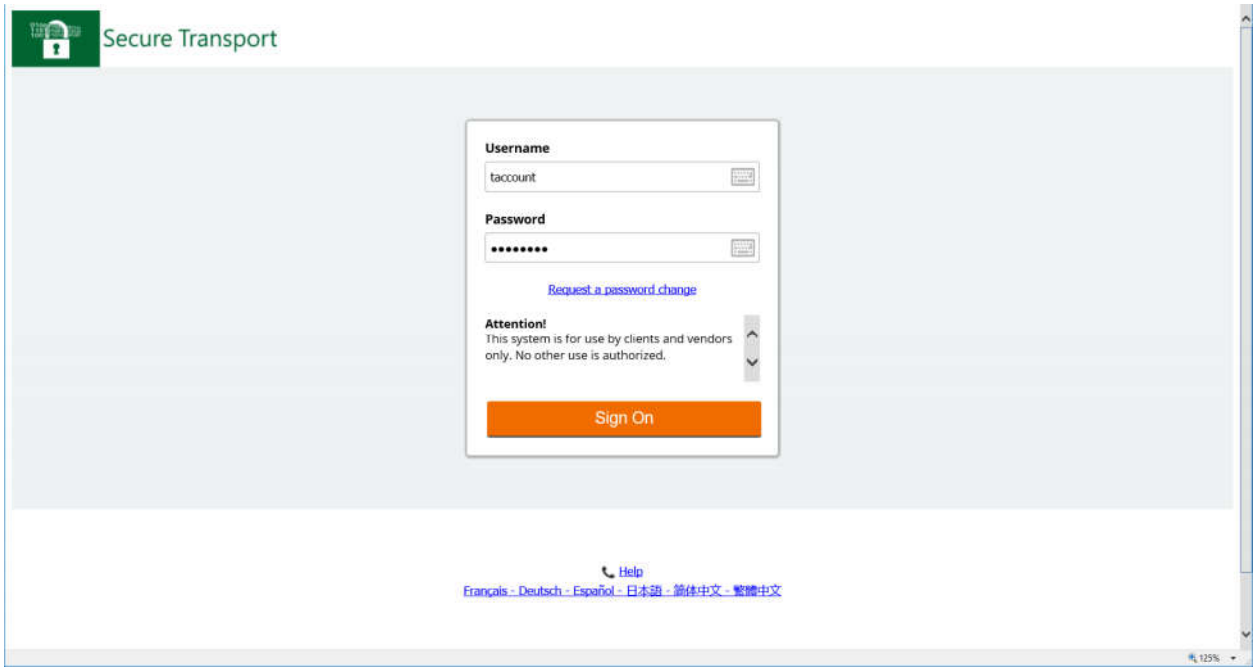
STEP 1. Using a supported web browser such as Internet Explorer or Google Chrome, you can connect to DMI Secure transport by entering the following URL:

https://secureftp.dmiconnect.com



Note: http access is not supported. Double check that you are typing https in the URL address field.

STEP 2. When you connect it will show the following web page where you can login with your login user id and your login password that has been emailed to you. Click on **Sign On** to login.

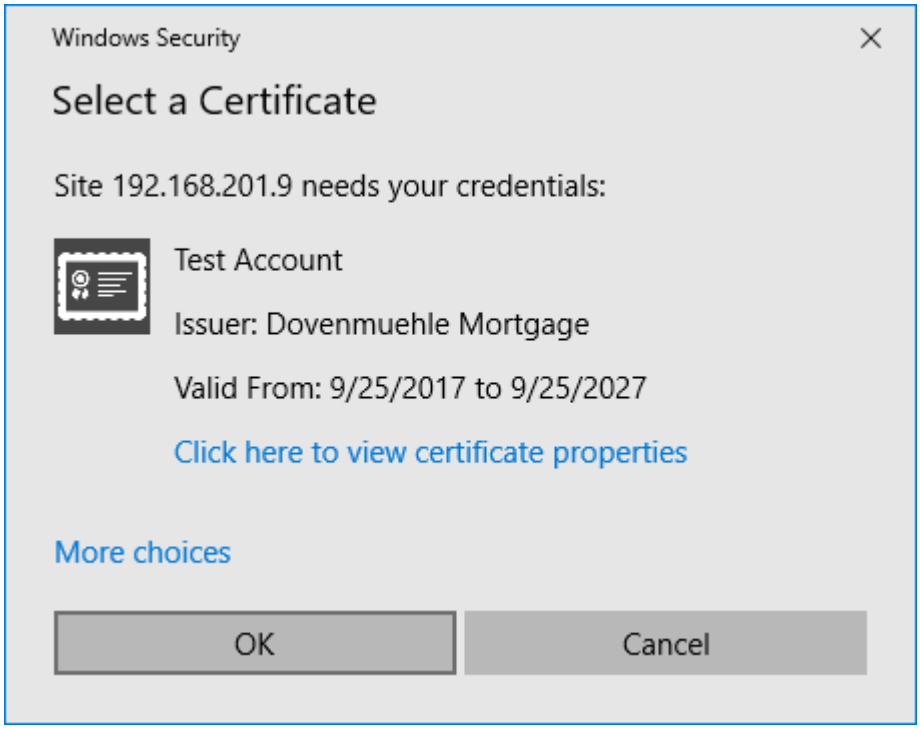


Note: if you don't remember your password, you can directly reset your password by clicking on **Request a password change**. It will send you an email to initiate the process to reset your password. (*See the **Reset User Password** chapter in this guide*)

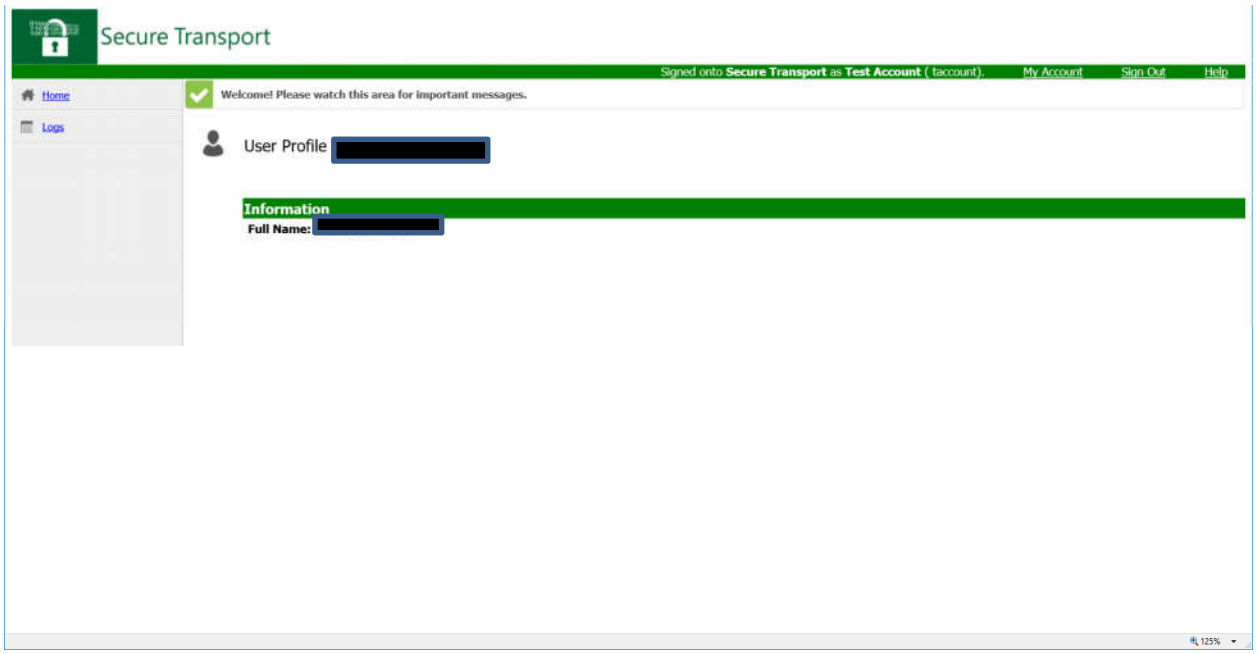
STEP 3. **DMI Secure Transport** will request to your web browser to use the certificate issued to you.

Your web browser may prompt you to select a certificate (depending on your configured

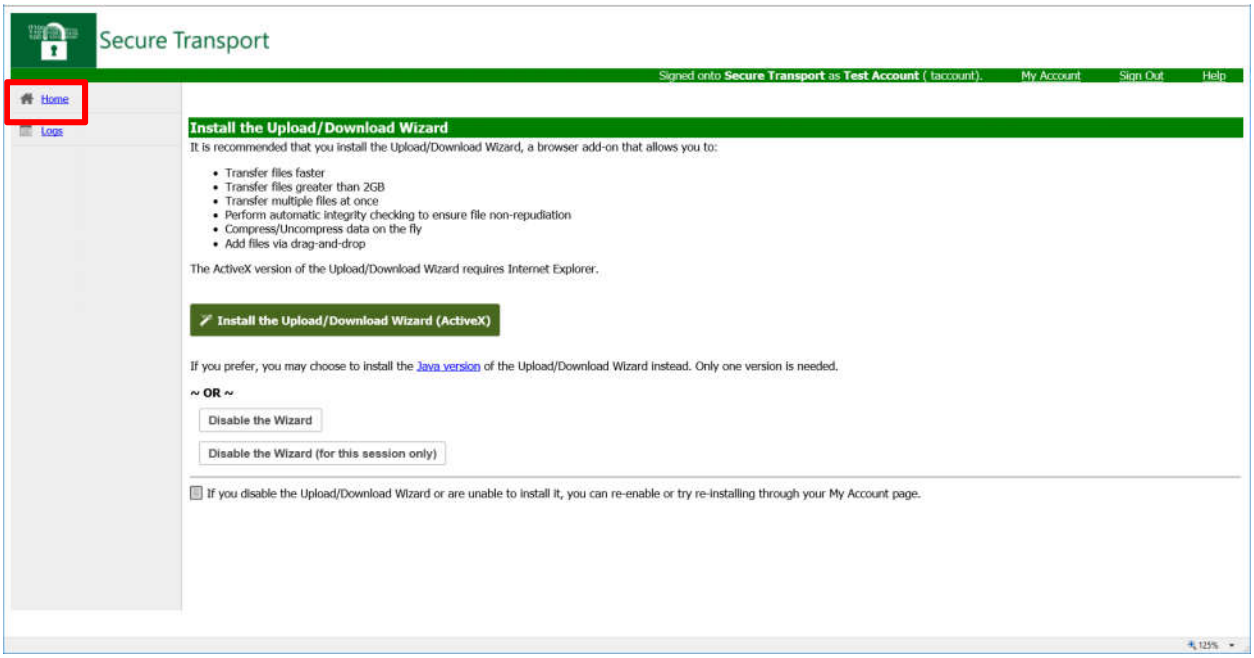
settings) If you are prompted to select a certificate, Select the one issued by Dovenmuehle Mortgage and click **OK**.



STEP 4. Upon login you will presented with the Welcome page.



On left side of screen click on Home

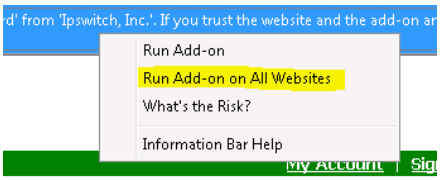


The first time you will be ask to install the **Upload/Download Wizard** from the MOVEit DMZ solution software.

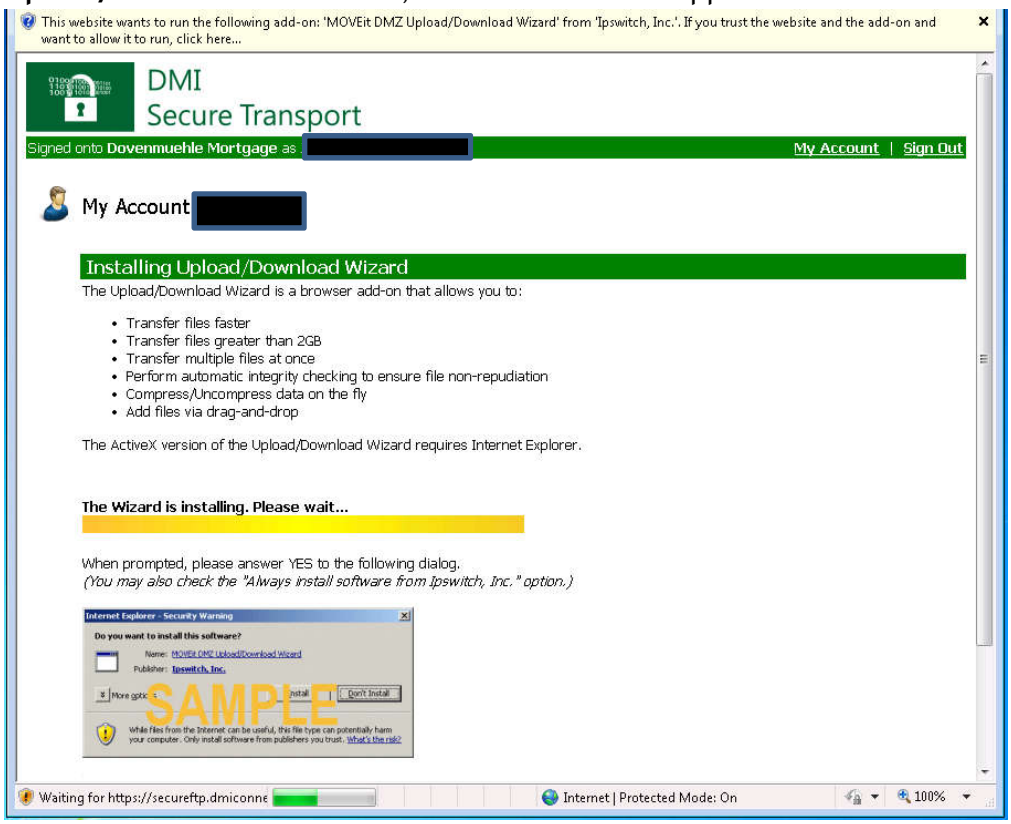
The Upload/Download Wizard will help you to transfer files on a friendly and reliable way. The use of web page to upload and download is not recommended for large size and/or a large number of files. The use of the wizard will mitigate the need to use an FTP Client Software.

You can select to install the ActiveX (Internet Explorer only) by clicking on the bar message in the upper area, or by clicking on **Install the Upload/Download Wizard** link.
You can install the **Java version**.
Or you can select to not install the wizard by clicking on **Disable the Wizard**.
NOTE: If you choose to install the Upload/Download Wizard; you may require assistance from your IT Department.

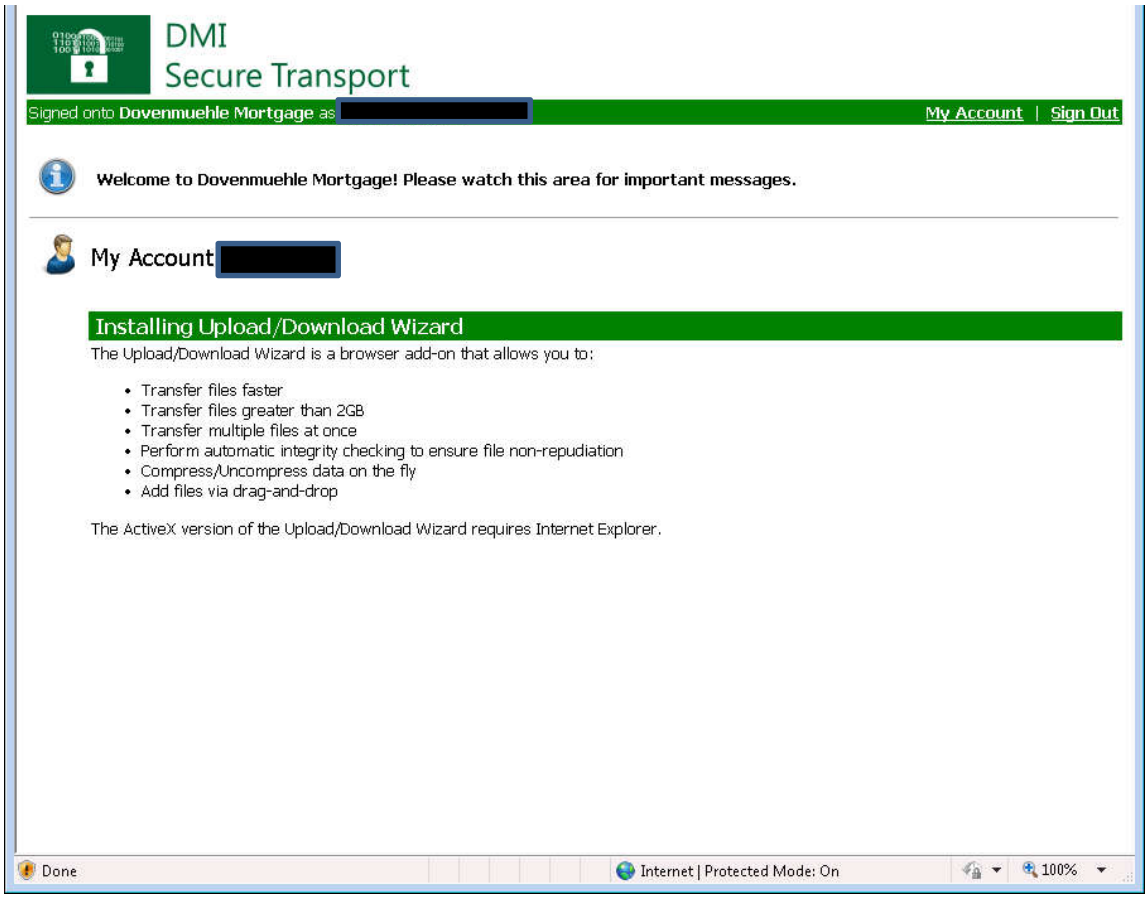
OPTION A. If you select the ActiveX and click on the upper message bar, you must select the option to **Run Add-on on All Websites**.



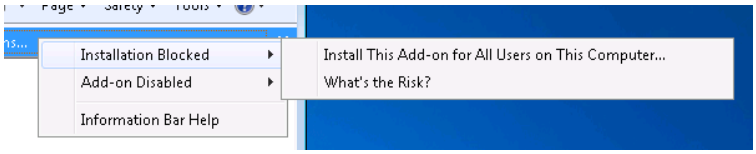
OPTION B. If you select the ActiveX and click on **Install the Upload/Download Wizard** link, it will download the application.



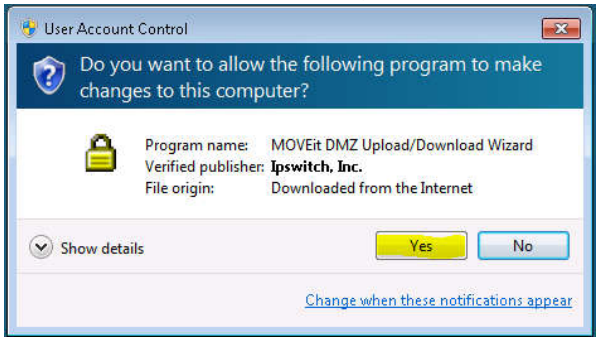
Then it will ask you to click on the upper message bar.



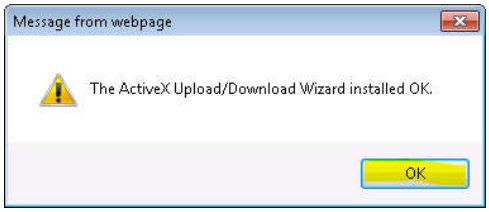
After clicking, you have to select **Installation Blocked** and then **Install This Add-on for All Users on This Computer**.



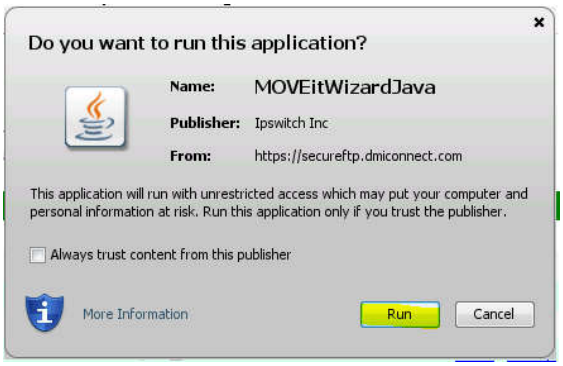
Then click **Yes** to allow the program.



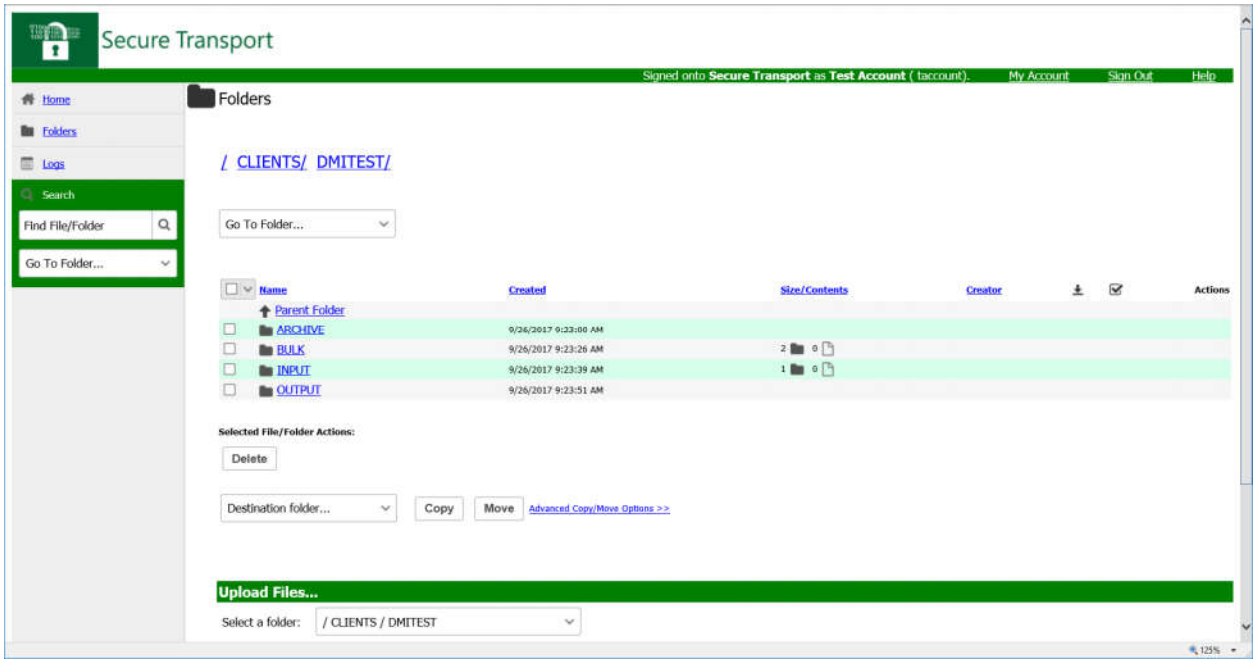
Click **OK** on the successful installation window.



OPTION C. If you select to install the Java version, you need to click on **Run** on the Java authorization window.



STEP 5. After installing the wizard you will see the Home navigation page.

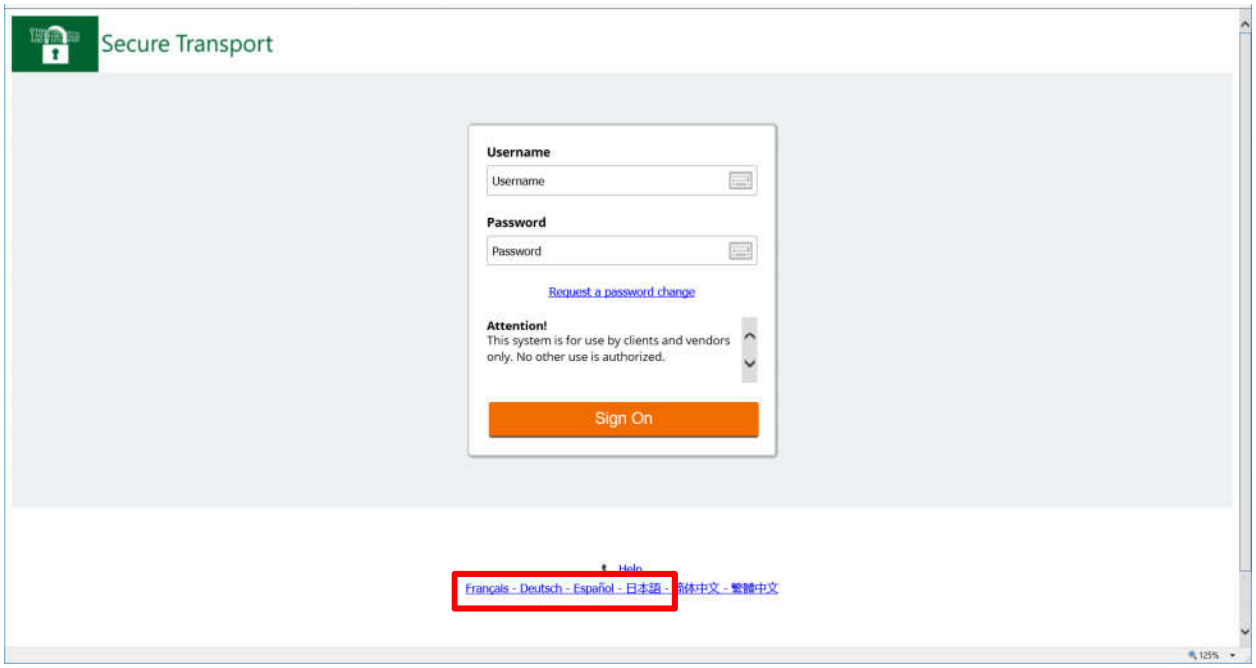


Reset User Password

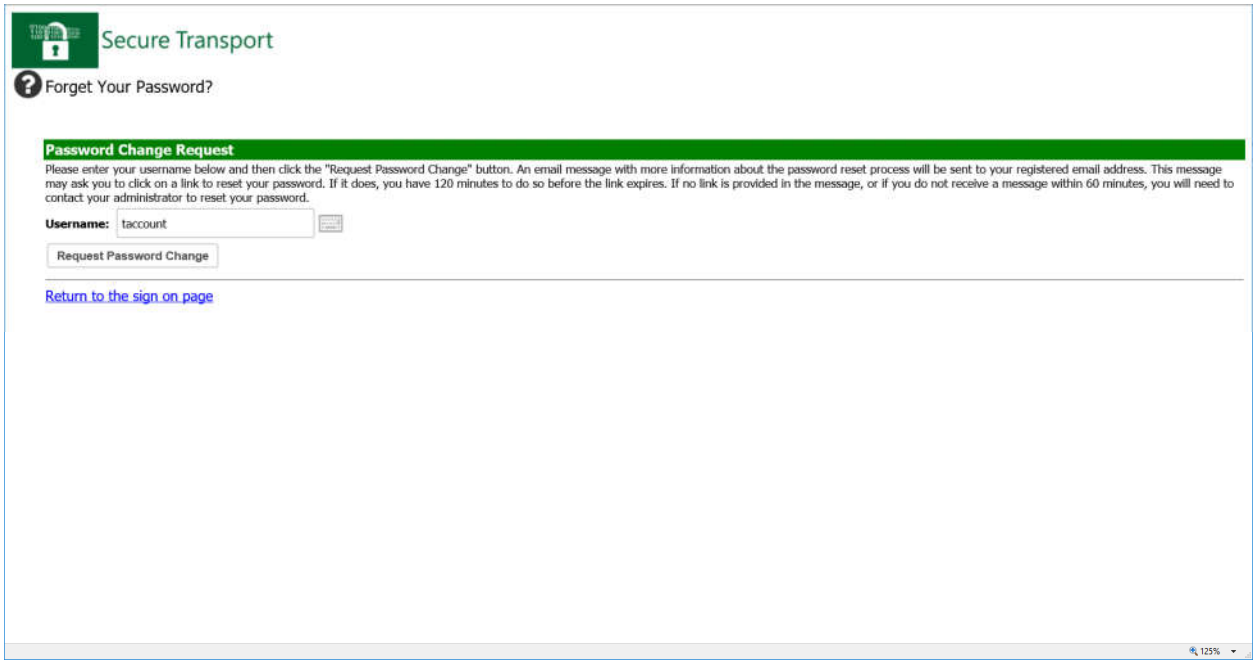
In the case that you forget your password and need to request a reset of your password, you

can request it directly on the login page for DMI Secure Transport at https://secureftp.dmiconnect.com
Users will be required to change passwords every 90 Days. DMI will remember and prevent the re-use of the last 6 passwords. Starting 18 days before the their password expires (Day 72), they'll get an e-mail reminder to change their password and when logging in between days 72-90 they should be forced to change it.
If they fail to change the password by that 90th day, the account will be disabled. Disabled account reactivation must be requested through the DMI HelpDesk.

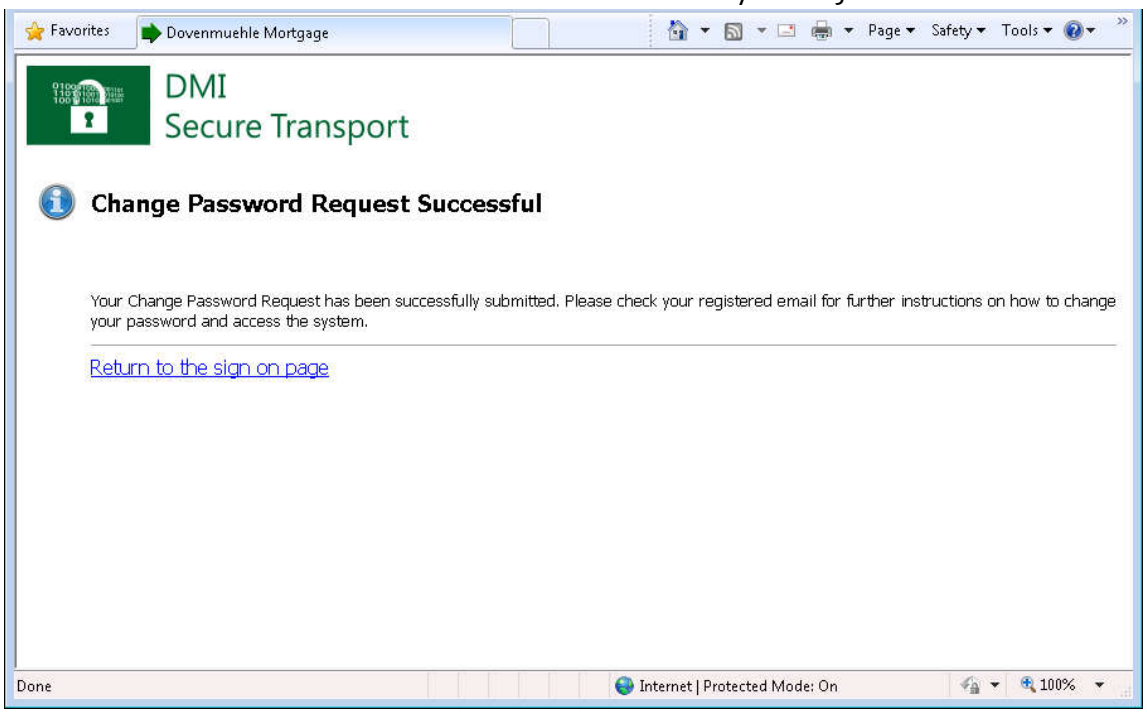
STEP 1. Click on the link Request a password change.



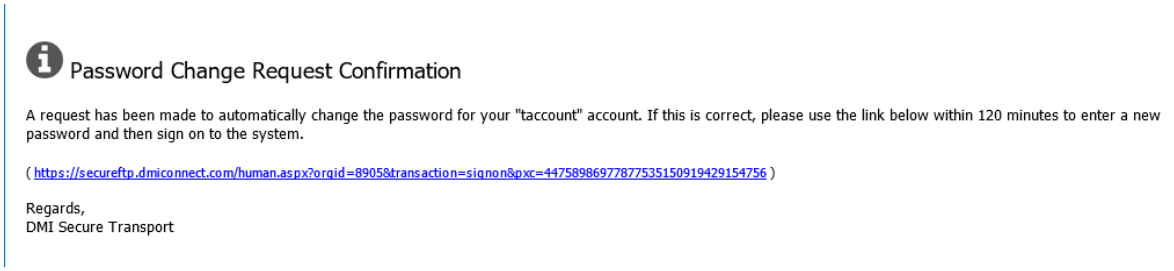
STEP 2. Type your user id and click on Request Password Change



STEP 3. An email with further instructions will be sent to your registered email address.



STEP 4. Click on the link on the email that you will receive.



Password Change Request Confirmation

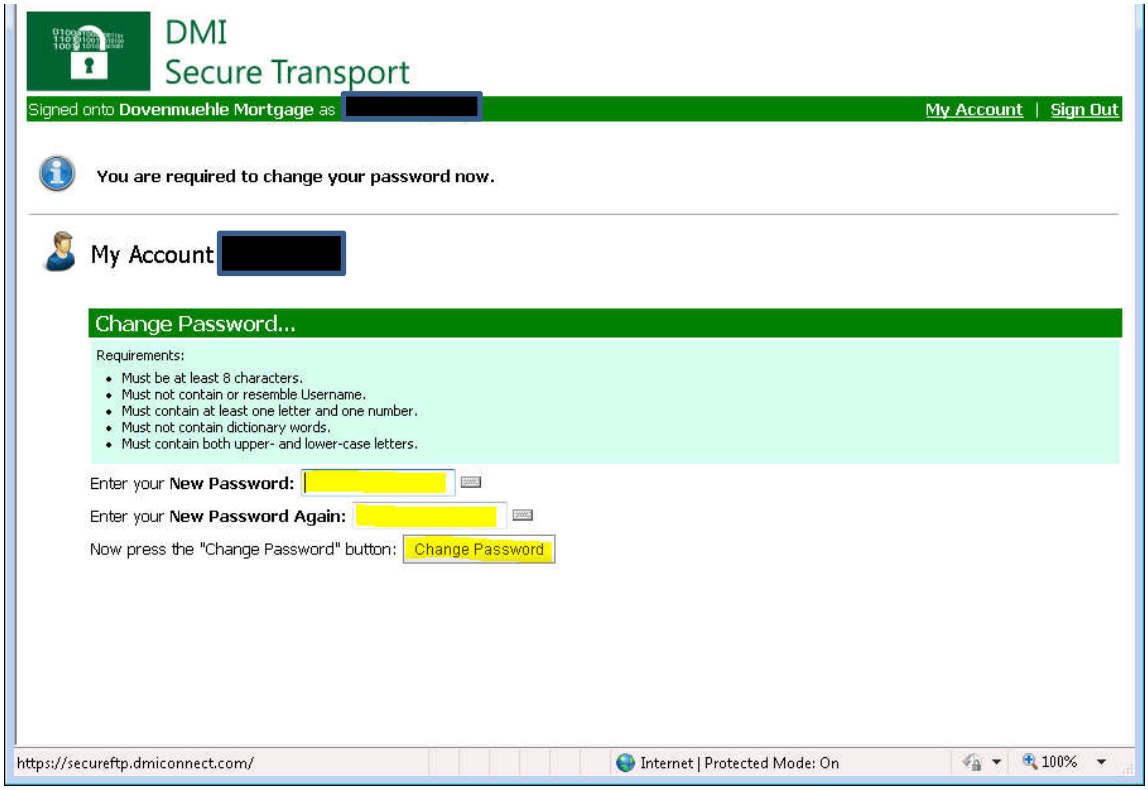
A request has been made to automatically change the password for your "taccount" account. If this is correct, please use the link below within 120 minutes to enter a new password and then sign on to the system.

(https://secureftp.dmiconnect.com/human.aspx?orgid=8905&transaction=signon&pxc=44758986977877535150919429154756)

Regards,
DMI Secure Transport

STEP 5. Your web browser will ask you to select the SSL/TLS certificate to use. You must select the certificate that has been supplied by Dovenmuehle.

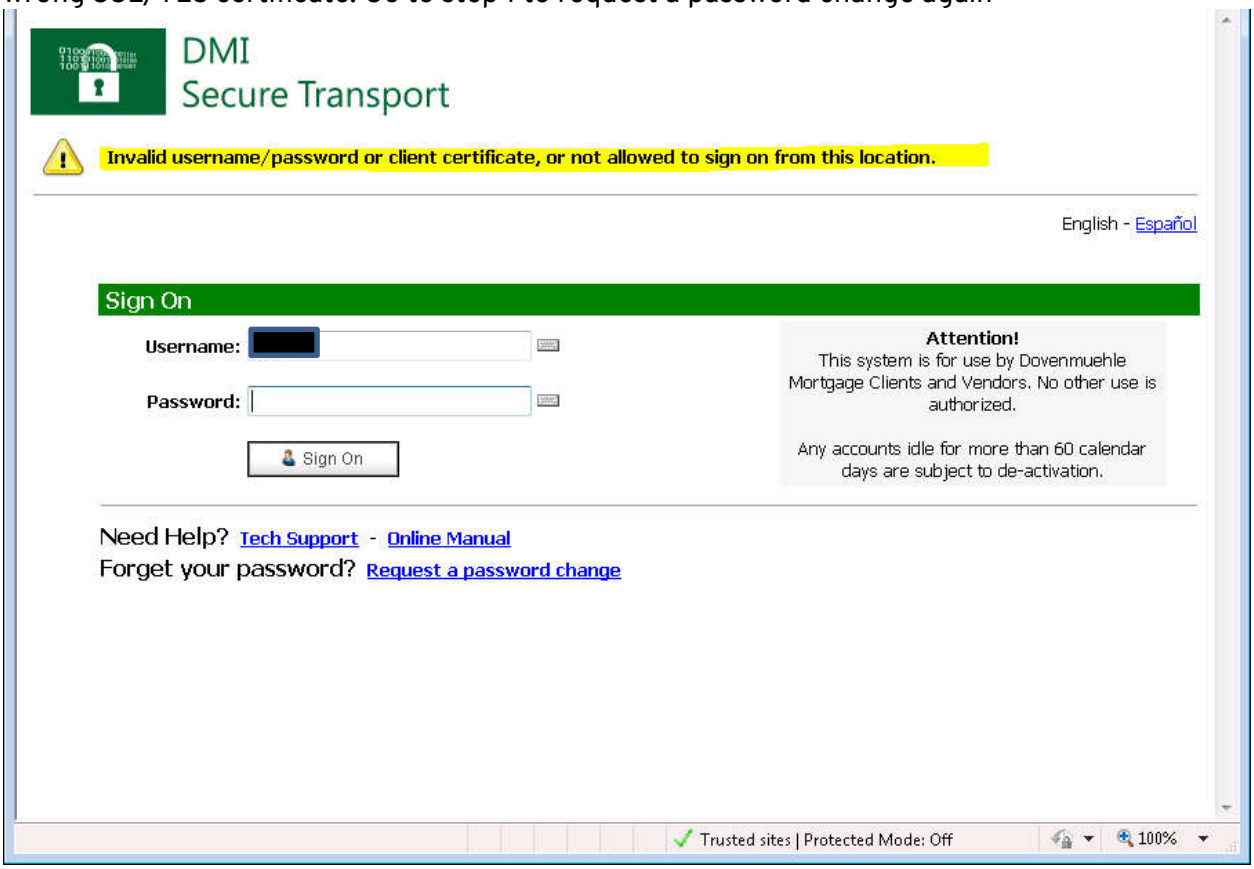
STEP 6. A web page will show in your web browser where you can enter your new password and then click on Change Password.



Remember that the new password must be:

- Must be at least 8 characters.
- Must not contain or resemble Username.
- Must contain at least one letter and one number.
- Must not contain dictionary words.
- Must contain both upper-case and lower-case letters.
- You may not use any of your previous 6 passwords.

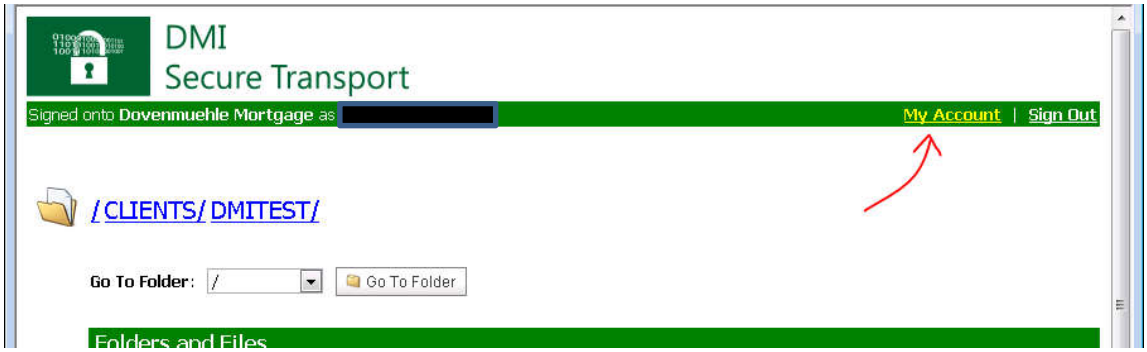
NOTE: If instead of the above page, you see the following one, it means that you select the wrong SSL/TLS certificate. Go to step 1 to request a password change again



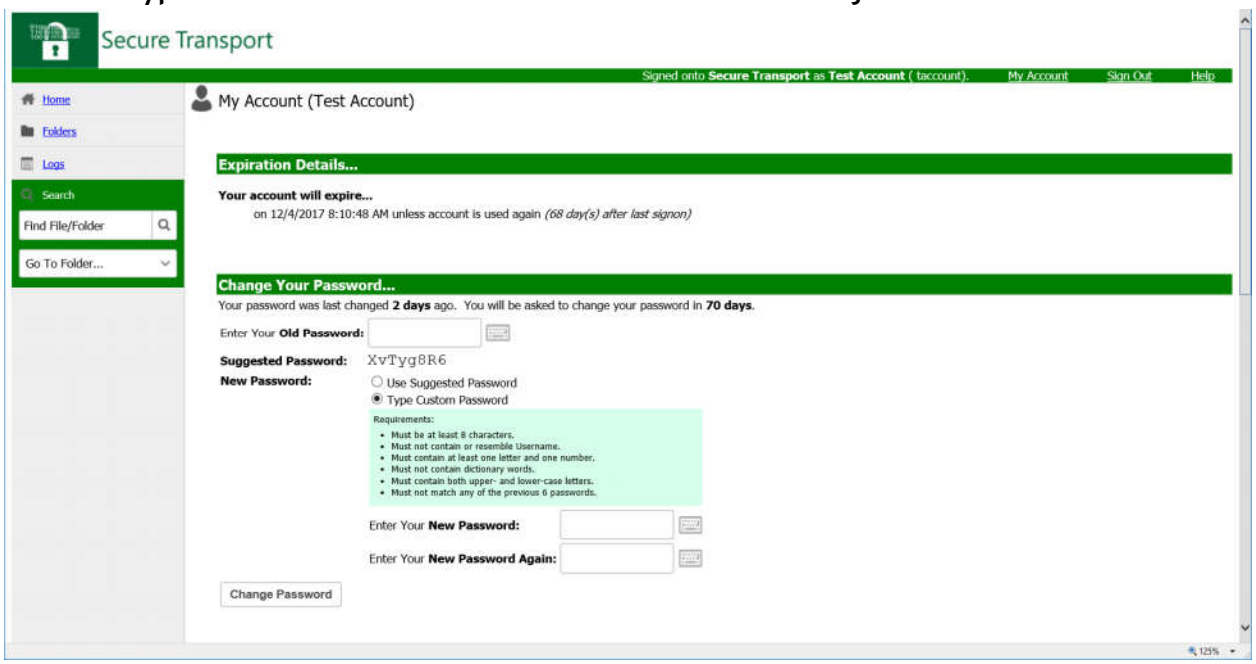
How To Change Your Password

You can change your password any time.

STEP 1. Click on **My Account**

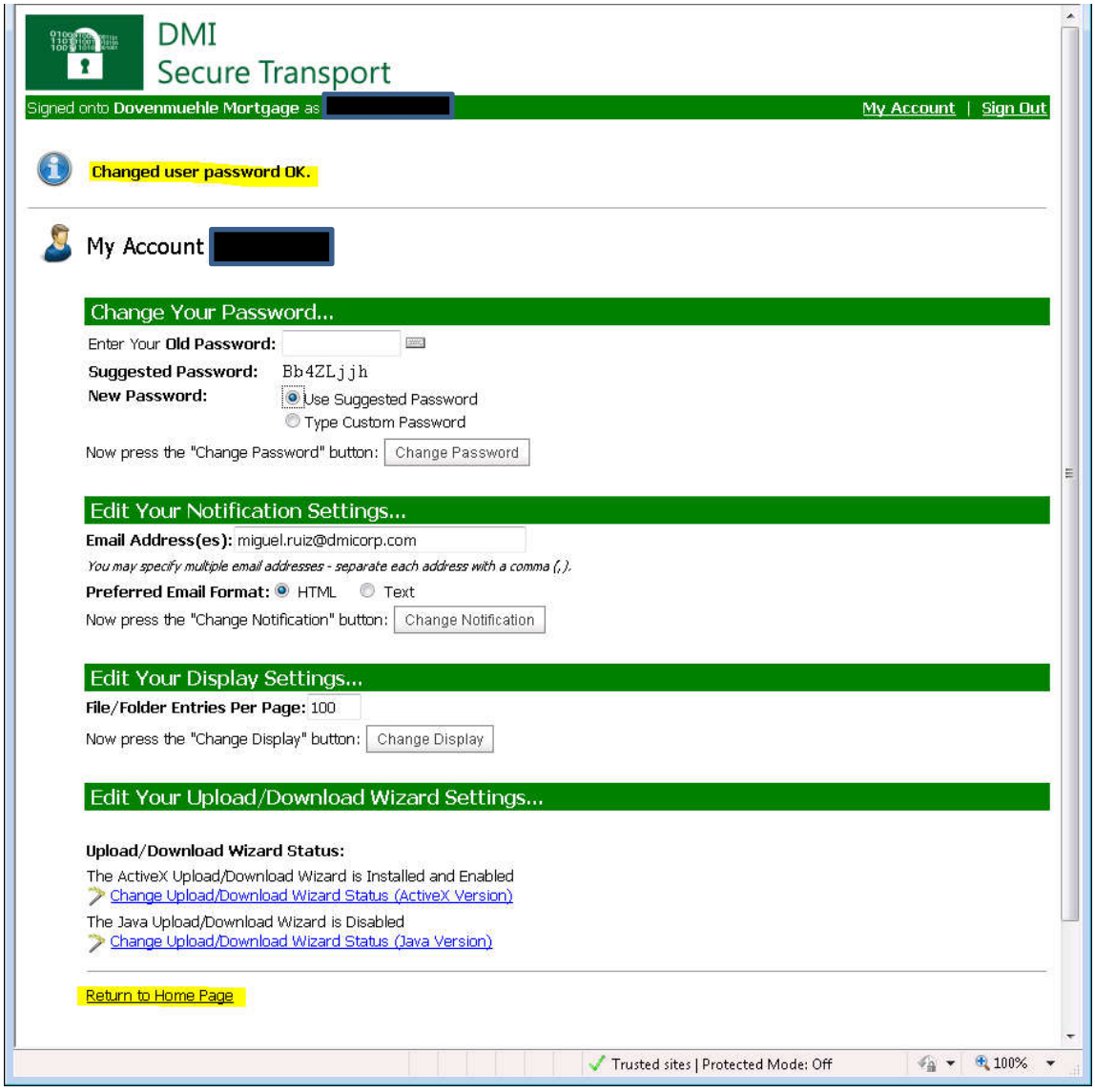


STEP 2. You will need to enter your **Old password.** You can use the suggested password or select to **Type Custom Password.** Then click on the button **Change Password.**



You will see the message that **Changed user password OK.** At the bottom of the page, click

on **Return to Home Page.**



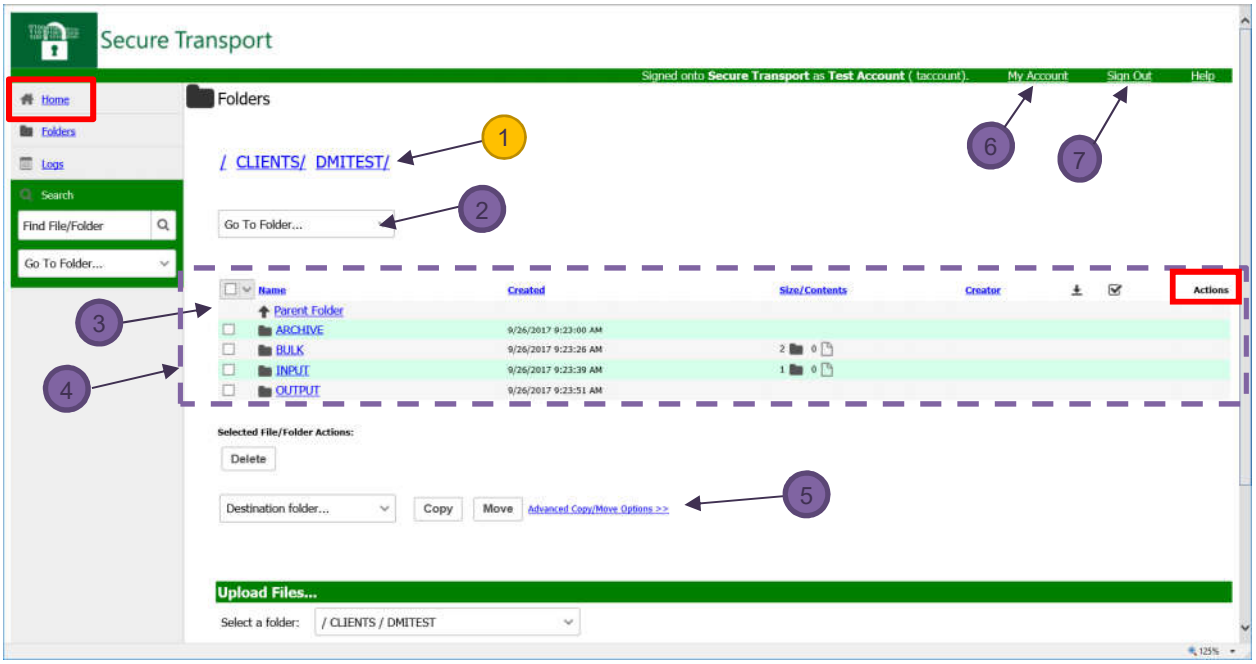
2

Navigation Panel

Navigation Panel

The following are the different areas in the Navigation Panel:

Home Screen



1. **Folder Path**
   Shows the folder path that is associated with your user account.

2. **Go to Folder**
   Easy shortcut to all the folders in the repository. Click on **Go to Folder** to list the content of the selected folder.

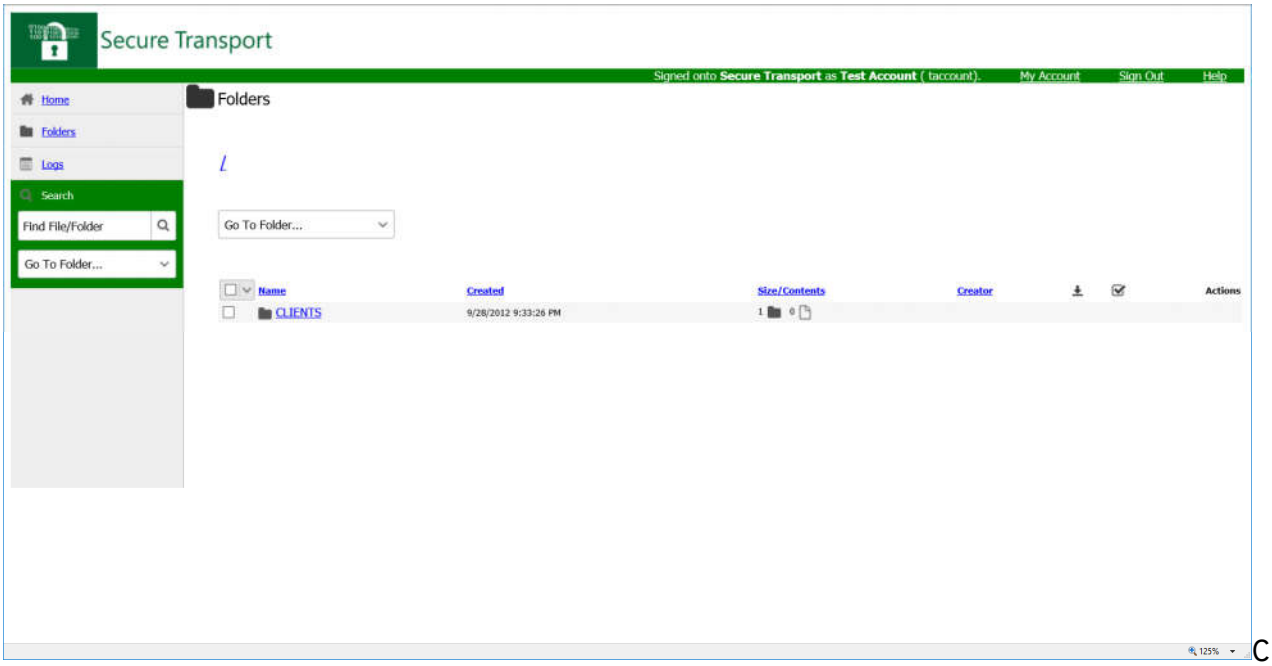
3. **Parent Folder Link**
   Click here to list the content of the parent folder.
4. **Content List**
   List the content of the folder. The main folder has the following structural folders:

   - **Archive**
     Folder contains daily zip files of all the files that were made available in the Output folder that day. The Archive folder retains files for the past 365 days.
   - **Bulk**
     Folder used for the transfer of bulk data files.
     - **Input**
       Folder to upload files to Dovenmuehle.
     - **Output**
       Folder where files and reports generated by Dovenmuehle are placed
     -
   - **Input**
     Folder to upload files to Dovenmuehle.
     - **DocumentImagings**
       Folder to upload .pdf files to Dovenmuehle.
   - **Output**
     Folder where files and reports generated by Dovenmuehle are placed

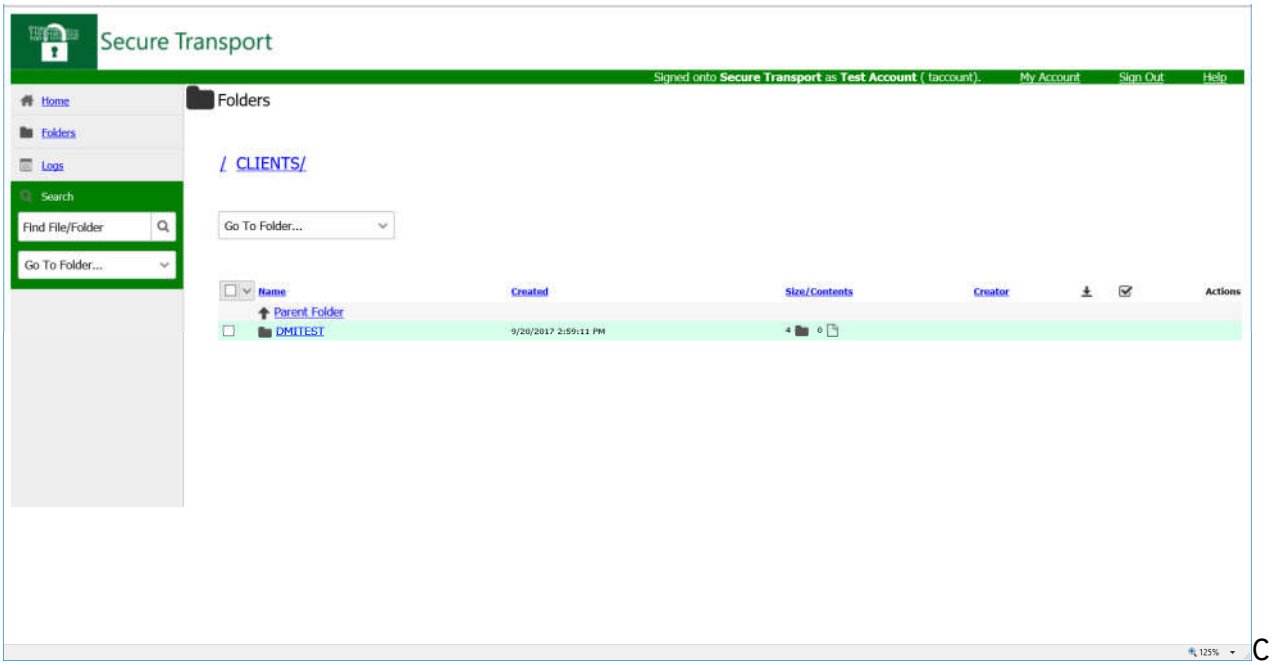
   Clicking on the folder name will list the content of the folder.
5. **Action Button**
   Where you can start to download all the selected files or upload files.
6. **My Account**
   Manage your account information; change your password, change your email address, display settings and Upload/Download Wizard settings.
7. **Sign Out**
   Logout from *DMI Secure Transport* application.

Folders

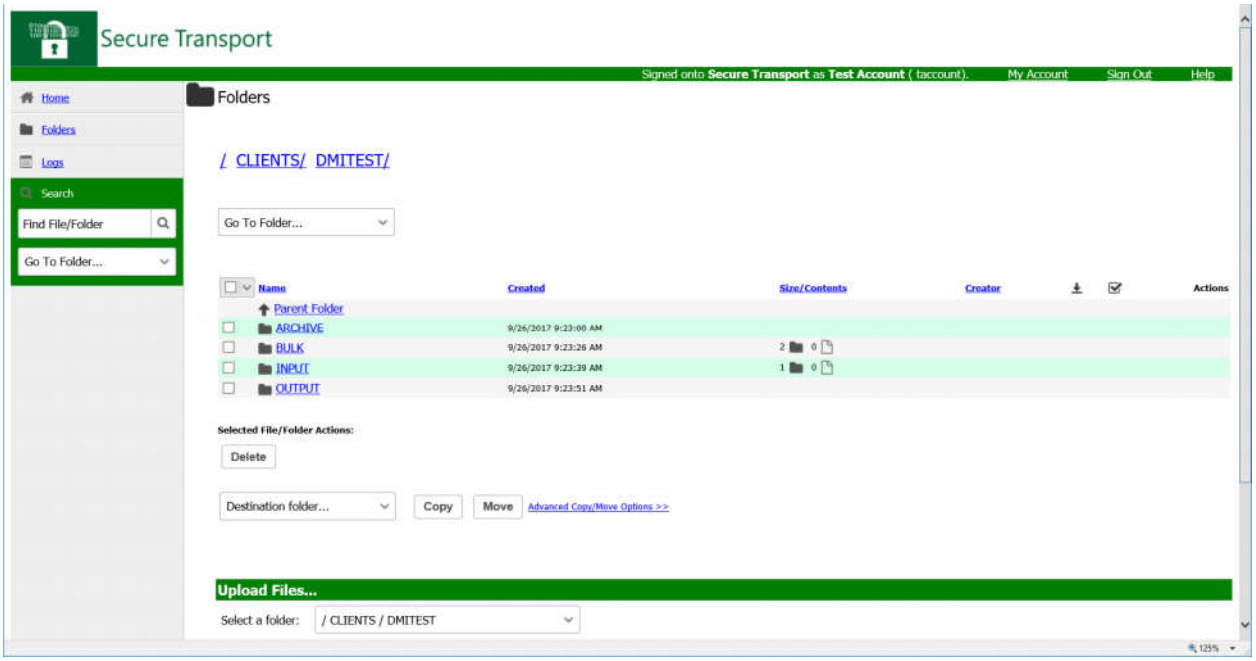
Lists Folders that your account has access to.



Click on Clients to see list of Client folders available

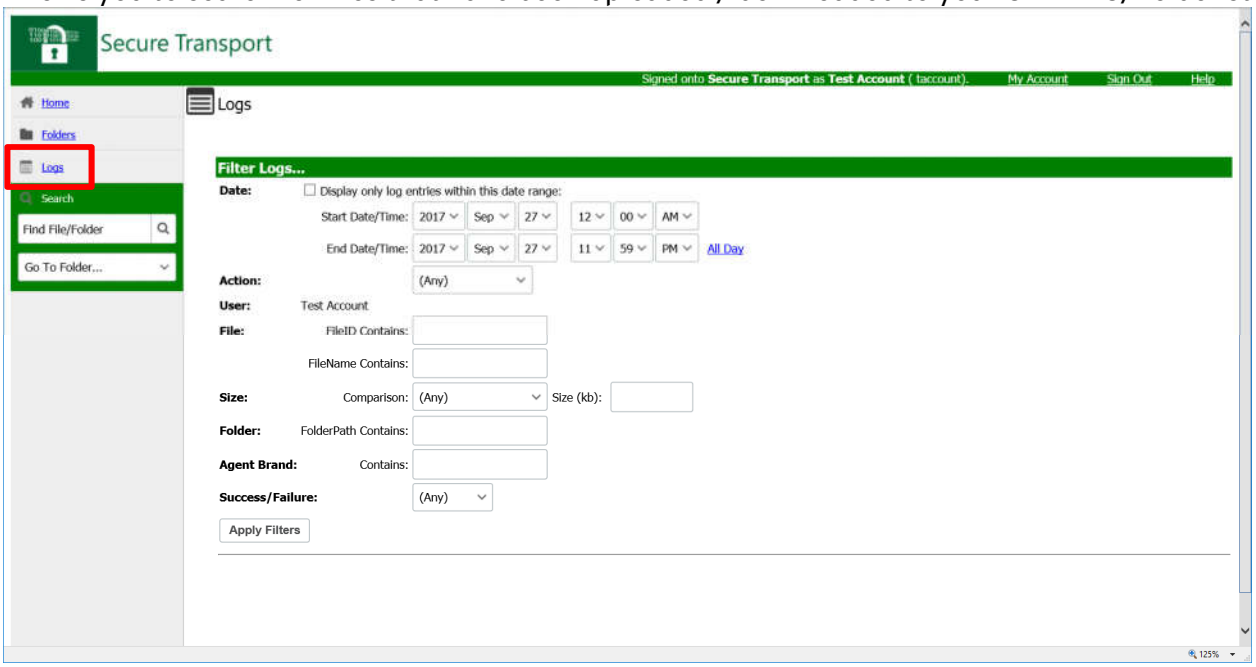


Click on your Client code to see file structure. (Much like the Home Screen Displays)



Logs

Allows you to search for files that have been uploaded / downloaded to your CLIENTS/ folder structure.



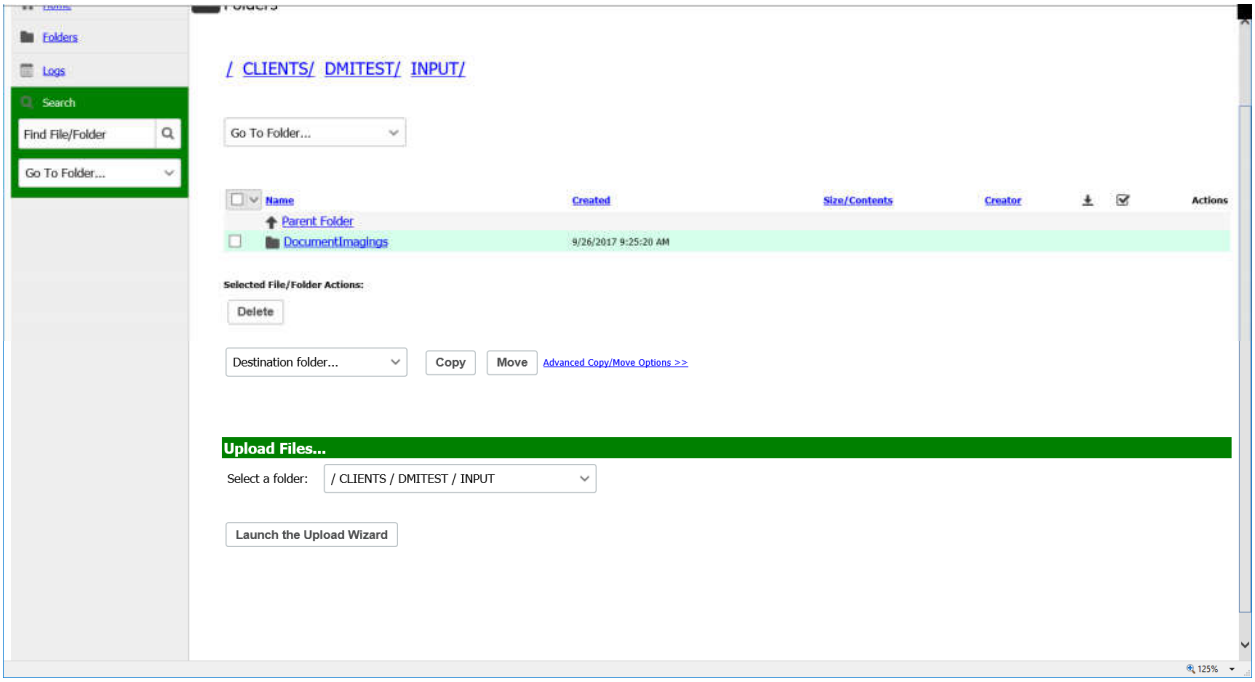
3

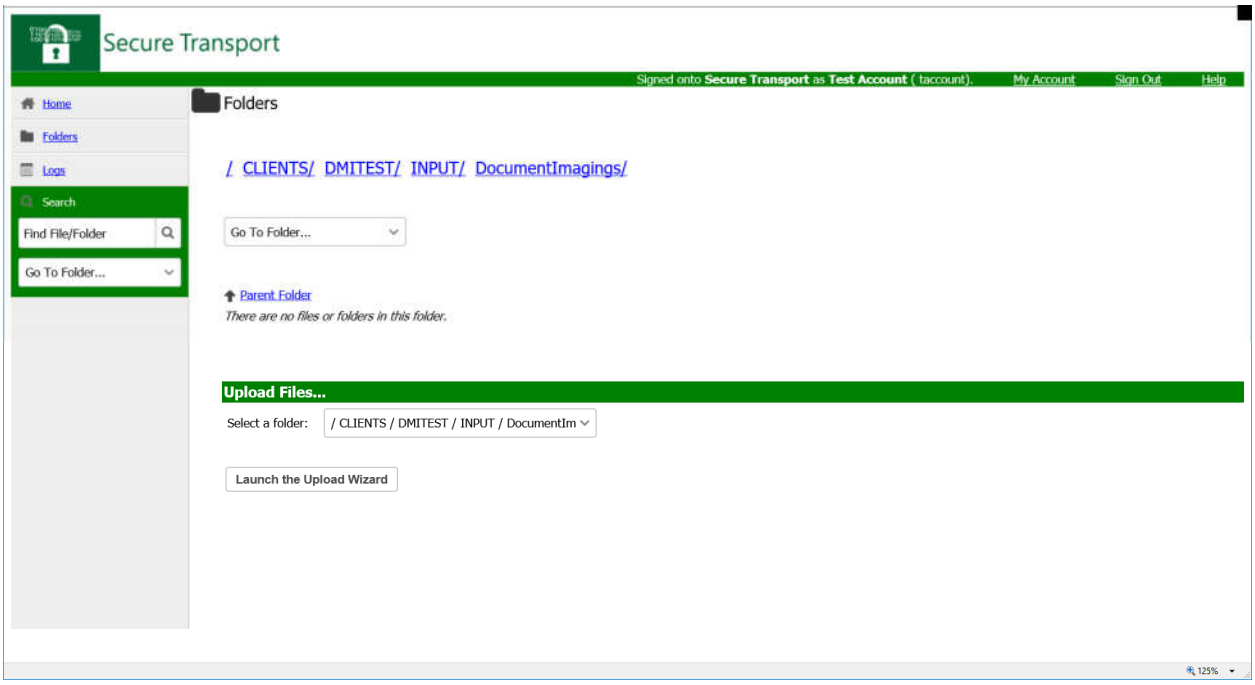
Transferring Files

Upload Files

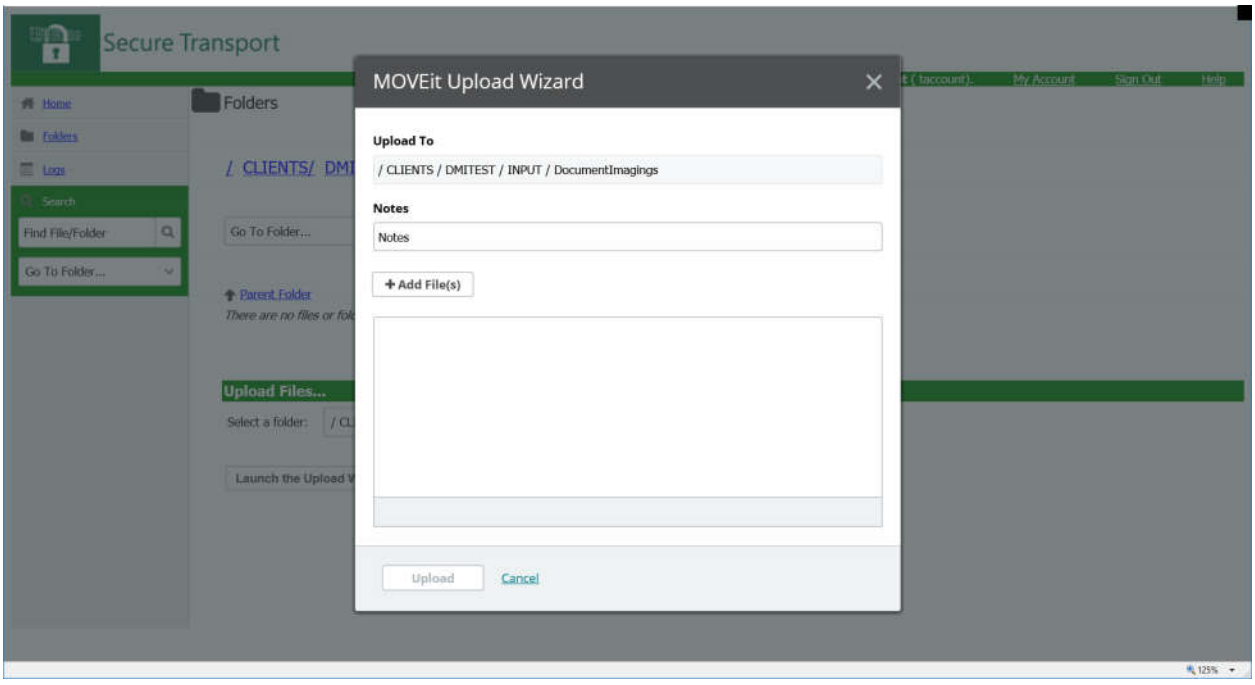
You can upload files to *DMI Secure Transport* mainly using the **Input** folder. For bulk data files you can use the **Bulk** folder.

STEP 1. Browse to the input folder or the folder where you want to upload the files. Use the DocumentImagings folder to upload .pdf files

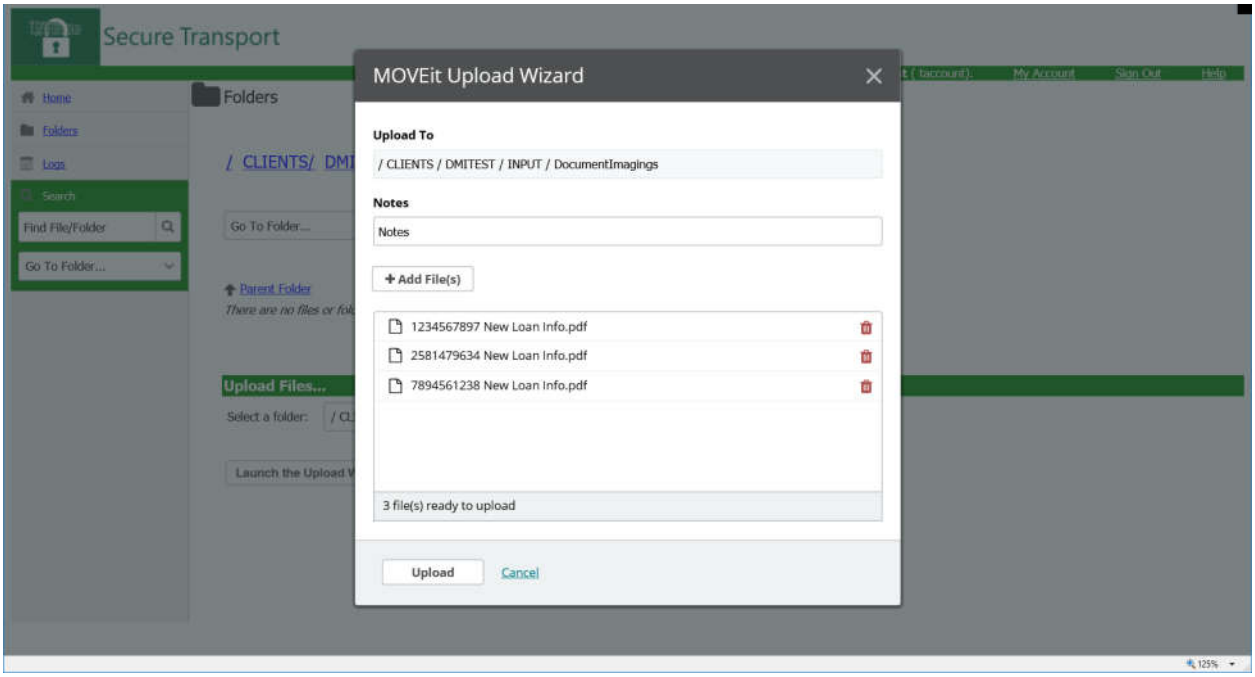




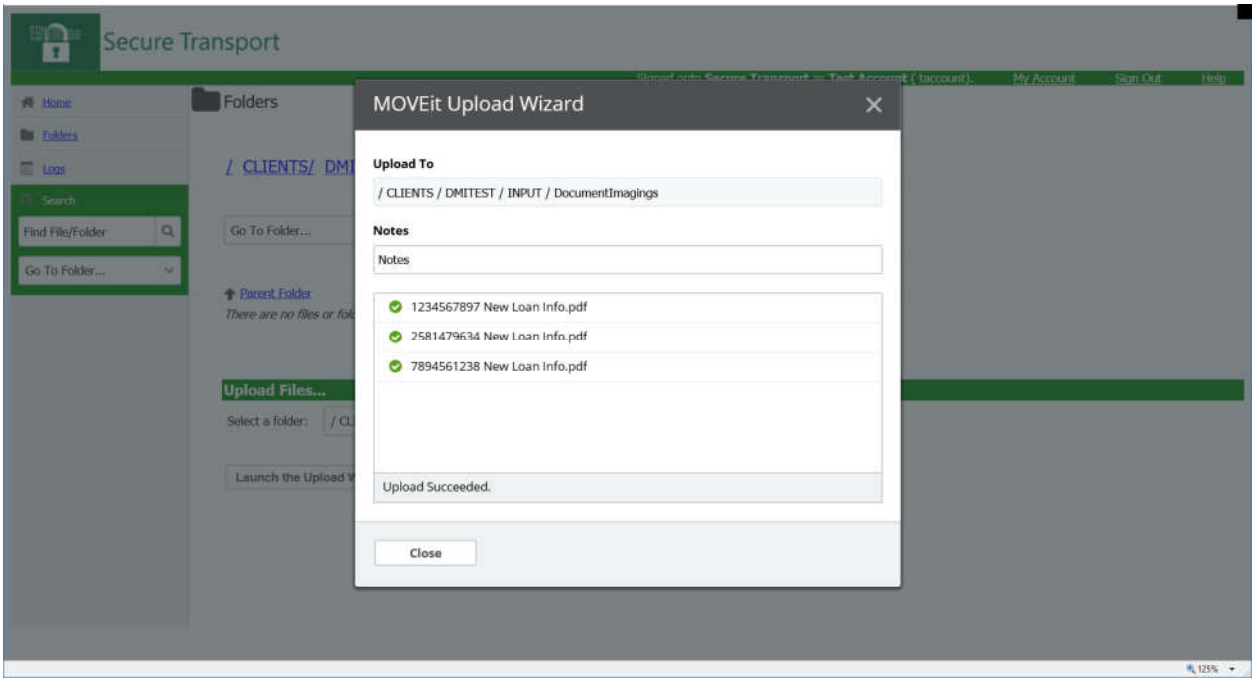
STEP 2. Click on Launch the Upload Wizard



STEP 3. Add files to be uploaded. Select Upload to begin upload process.

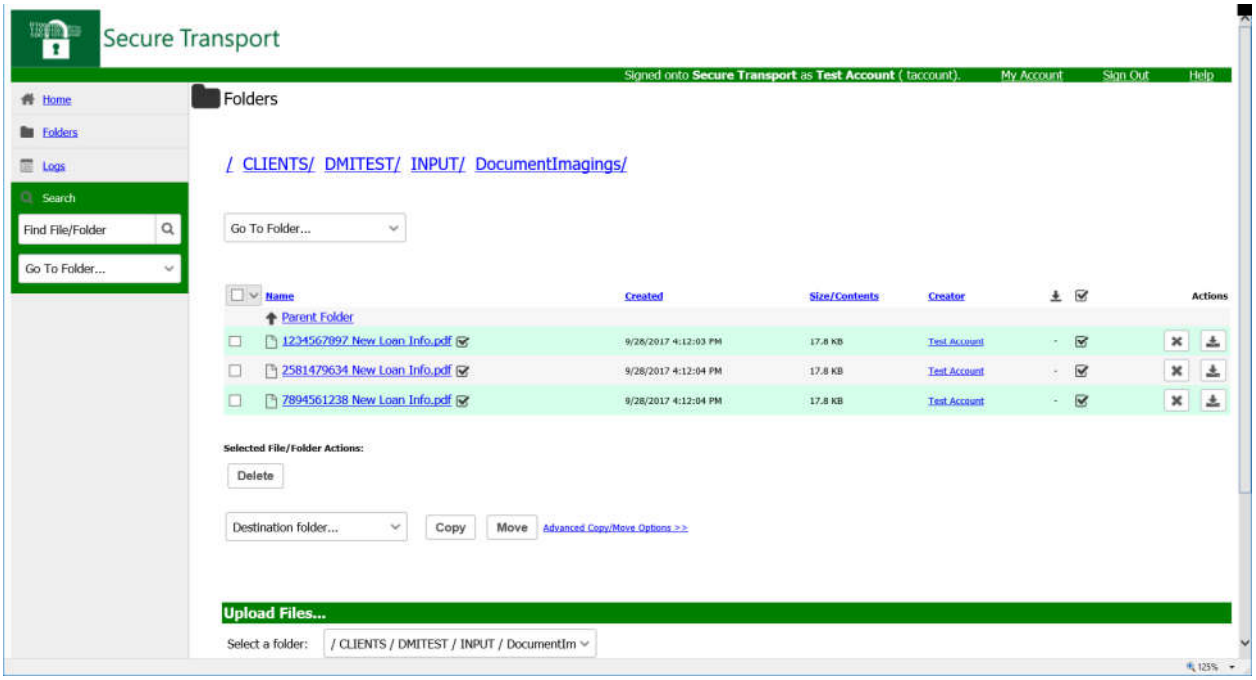


STEP 4. When the upload is complete a screen will appear with files that have uploaded. Select Close.



STEP 5. Your web browser will update the page and show the new files that have been uploaded.

NOTE: .pdf files uploaded to the DocumentImagings folder are swept to the Dovenmuehle folders to be scanned. This process runs quickly so you may not see your files listed here.

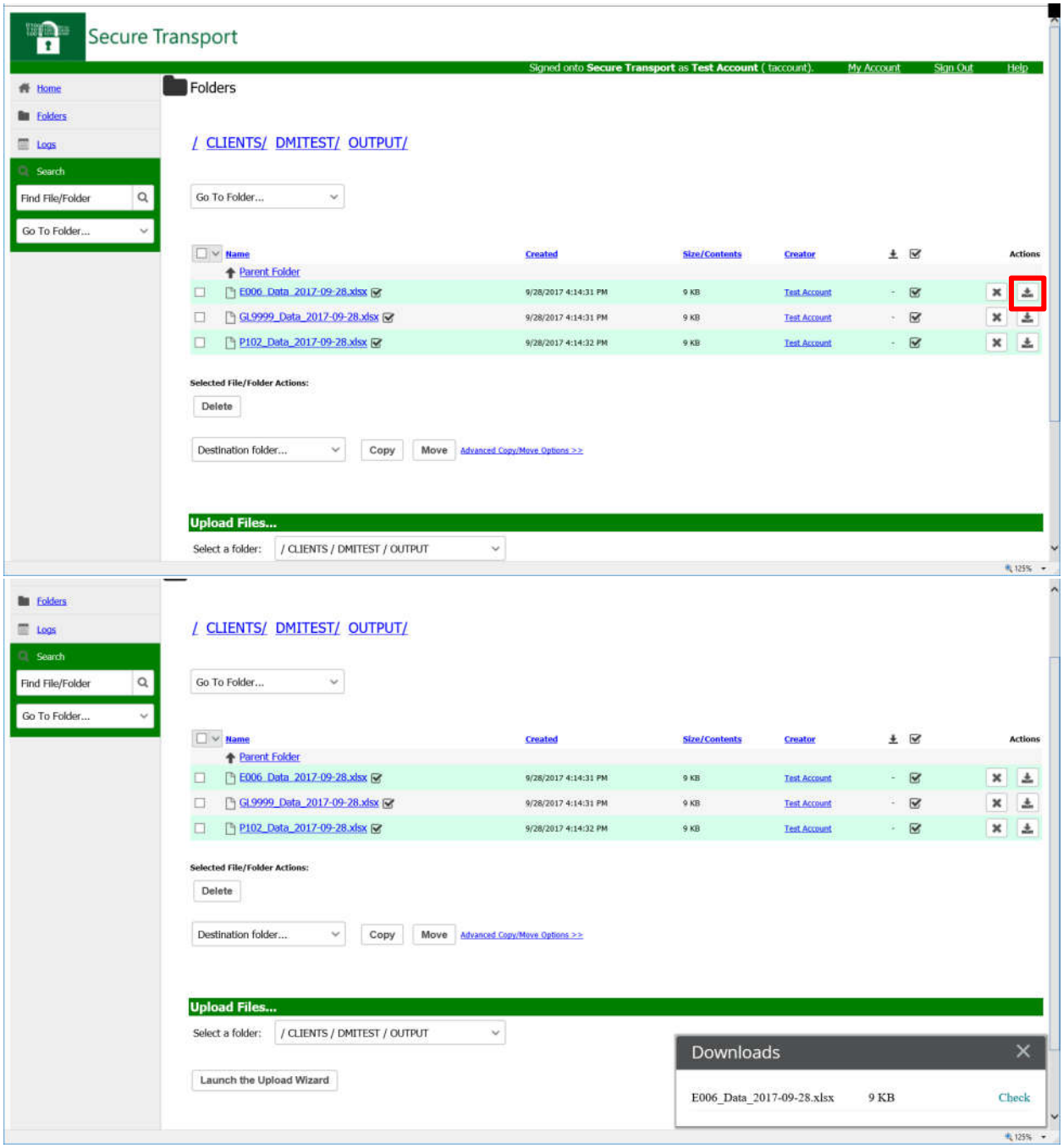


Download Files

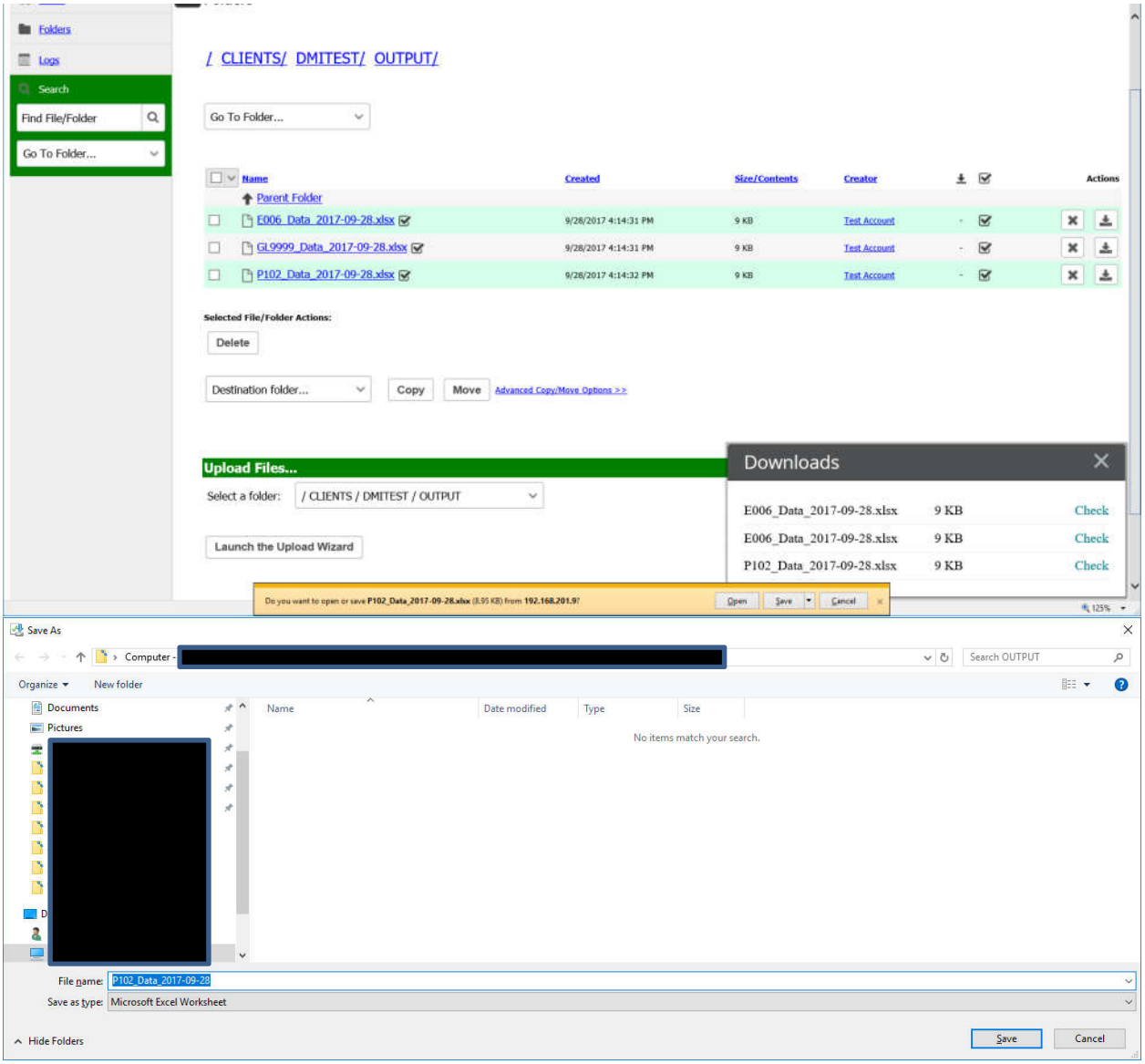
You can download files from any folder. Current processing day items can be found in the Output folder. Files from a previous processing day can be found in a Zip archive located in the Archive folder. The zip files in the Archive folder will follow the format “Output_YYYYMMDD”.

STEP 1. Browse to locate the file to download.

STEP 2. Select the file clicking the check mark to the left of the file name. When you have all the files selected, click on **Download**.



The window will open and ask you open, save or cancel the file download. If you select save, browse to the destination folder. Choose and click save.


Folders
Logs
Search
Find File/Folder
Go To Folder...
/ CLIENTS/ DMITEST/ OUTPUT/
Go To Folder...
Name
Created
Size/Contents
Creator
Actions
Parent Folder
E006_Data_2017-09-28.xlsx 9/28/2017 4:14:31 PM 9 KB Test Account
GL9999_Data_2017-09-28.xlsx 9/28/2017 4:14:31 PM 9 KB Test Account
P102_Data_2017-09-28.xlsx 9/28/2017 4:14:32 PM 9 KB Test Account
Selected File/Folder Actions:
Delete
Destination folder...
Copy
Move
Advanced Copy/Move Options >>
Upload Files...
Select a folder:
/ CLIENTS / DMITEST / OUTPUT
Launch the Upload Wizard
Downloads
E006_Data_2017-09-28.xlsx 9 KB Check
E006_Data_2017-09-28.xlsx 9 KB Check
P102_Data_2017-09-28.xlsx 9 KB Check
Open
Save
Cancel
Save As
Computer
Search OUTPUT
Organize
New folder
Documents
Pictures
Name
Date modified
Type
Size
No items match your search.
File name:
P102_Data_2017-09-28
Save as type:
Microsoft Excel Worksheet
Hide Folders
Save
Cancel

Advance Connection Features

DMI Secure Transport also allows connectivity to be established via a Secure FTP Client Software using the FTPS and SFTP protocols.

Dovenmuehle Mortgage does not endorse the use of any specific FTP Software; however, products such as Core FTP, WS_FTP, Filezilla and WinSCP have been tested successfully. Additional technical support for any kind of file transfer product should be provided by the manufacturer of the product.