

# Secure Transport

## User Guide



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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](mailto: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](mailto: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

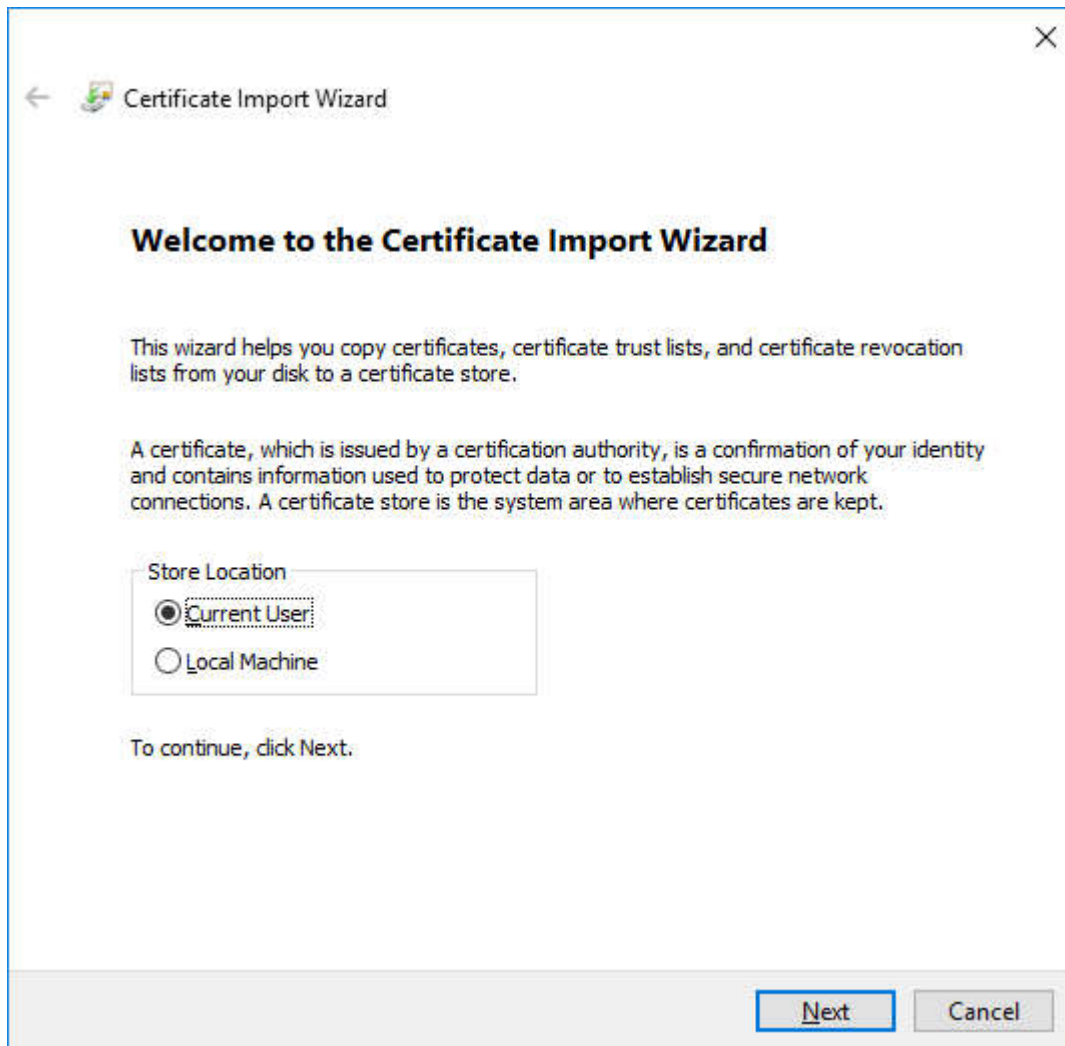
Your DMI Client Manager will authorize your request. We will process your request as soon as possible, but please be aware that this process can take three (3) business days.

## Install User Certificate on Windows

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

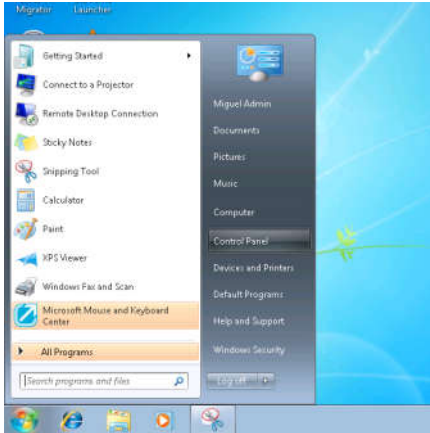
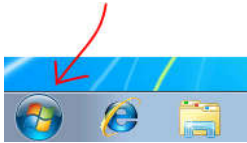
**STEP 1.** Double click the certificate .pfx file, and the **Certificate Import Wizard** will start.

Then click on Next

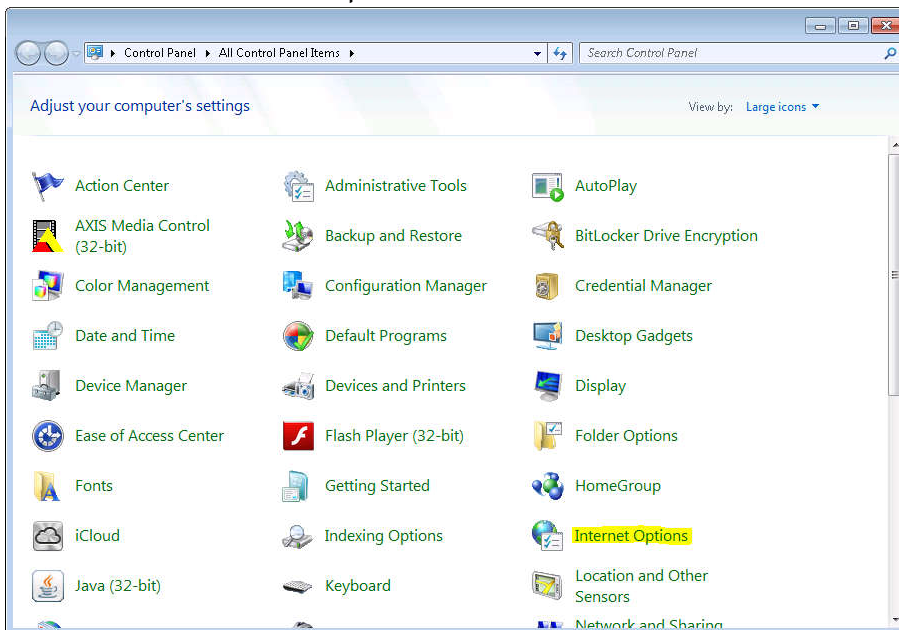


If the Certificate Import Wizard doesn't start, you can try the following steps:  
**Skip to STEP 6 otherwise**

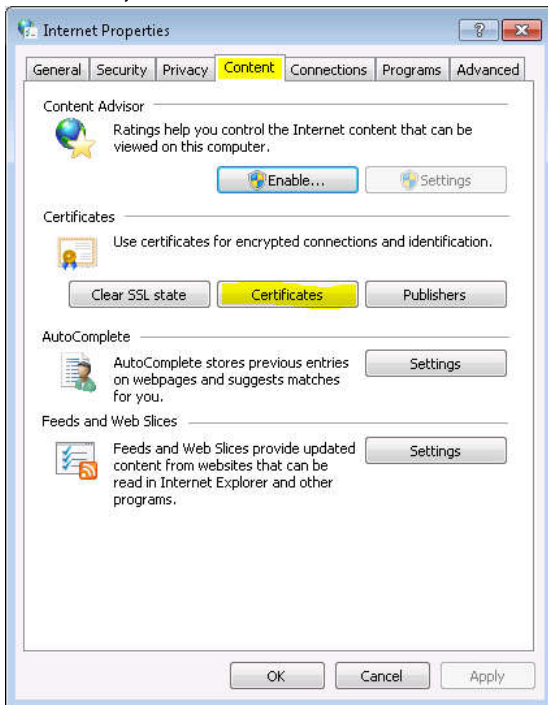
**STEP 2.** Open the **Control Panel** with the start button



**STEP 3.** Click on Internet Options.



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

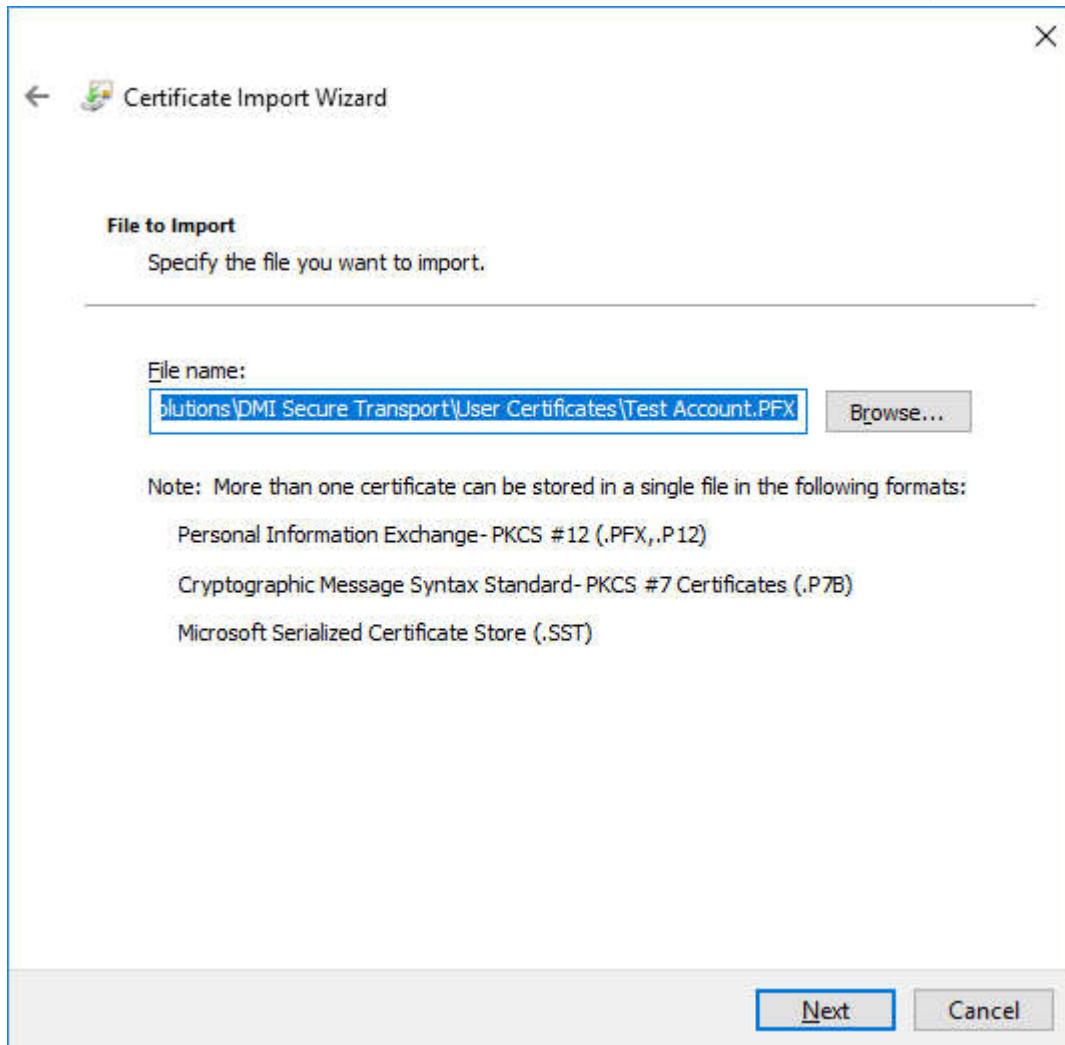


**STEP 5.** Click on **Import**.



*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**.



The image shows a Windows dialog box titled "Certificate Import Wizard". It has a back arrow icon and a close "X" button in the top right corner. The main heading is "File to Import" with the instruction "Specify the file you want to import." Below this is a horizontal line. Under the line, the text "File name:" is followed by a text box containing the path "olutions\DMI Secure Transport\User Certificates\Test Account.PFX". To the right of the text box is a "Browse..." button. Below the text box, there is a "Note:" section stating: "More than one certificate can be stored in a single file in the following formats:" followed by three bullet points: "Personal Information Exchange - PKCS #12 (.PFX, .P12)", "Cryptographic Message Syntax Standard - PKCS #7 Certificates (.P7B)", and "Microsoft Serialized Certificate Store (.SST)". At the bottom right, there are two buttons: "Next" and "Cancel".

← Certificate Import Wizard

**File to Import**  
Specify the file you want to import.

File name:  
olutions\DMI Secure Transport\User Certificates\Test Account.PFX

Browse...

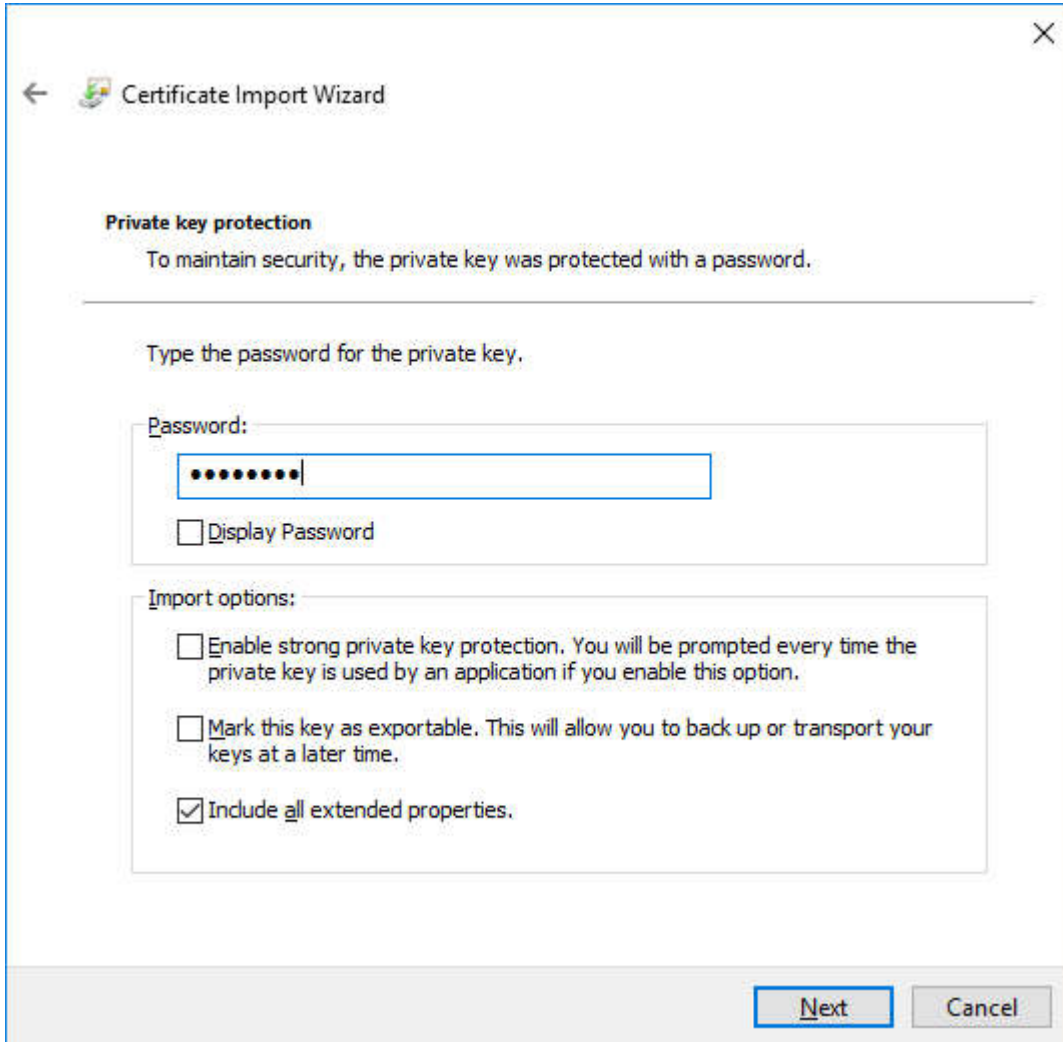
Note: More than one certificate can be stored in a single file in the following formats:

- Personal Information Exchange - PKCS #12 (.PFX, .P12)
- Cryptographic Message Syntax Standard - PKCS #7 Certificates (.P7B)
- Microsoft Serialized Certificate Store (.SST)

Next Cancel



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



The image shows a Windows dialog box titled "Certificate Import Wizard". It has a back arrow icon on the left and a close "X" icon on the right. The main content area is titled "Private key protection" and contains the text "To maintain security, the private key was protected with a password." Below this is a horizontal line and the instruction "Type the password for the private key." There is a "Password:" label followed by a text input field containing ten dots. Below the input field is a checkbox labeled "Display Password". Further down is a section titled "Import options:" containing three checkboxes: "Enable strong private key protection. You will be prompted every time the private key is used by an application if you enable this option." (unchecked), "Mark this key as exportable. This will allow you to back up or transport your keys at a later time." (unchecked), and "Include all extended properties." (checked). At the bottom right of the dialog are two buttons: "Next" and "Cancel".

← Certificate Import Wizard

**Private key protection**

To maintain security, the private key was protected with a password.

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Type the password for the private key.

Password:

.....

☐ Display Password

Import options:

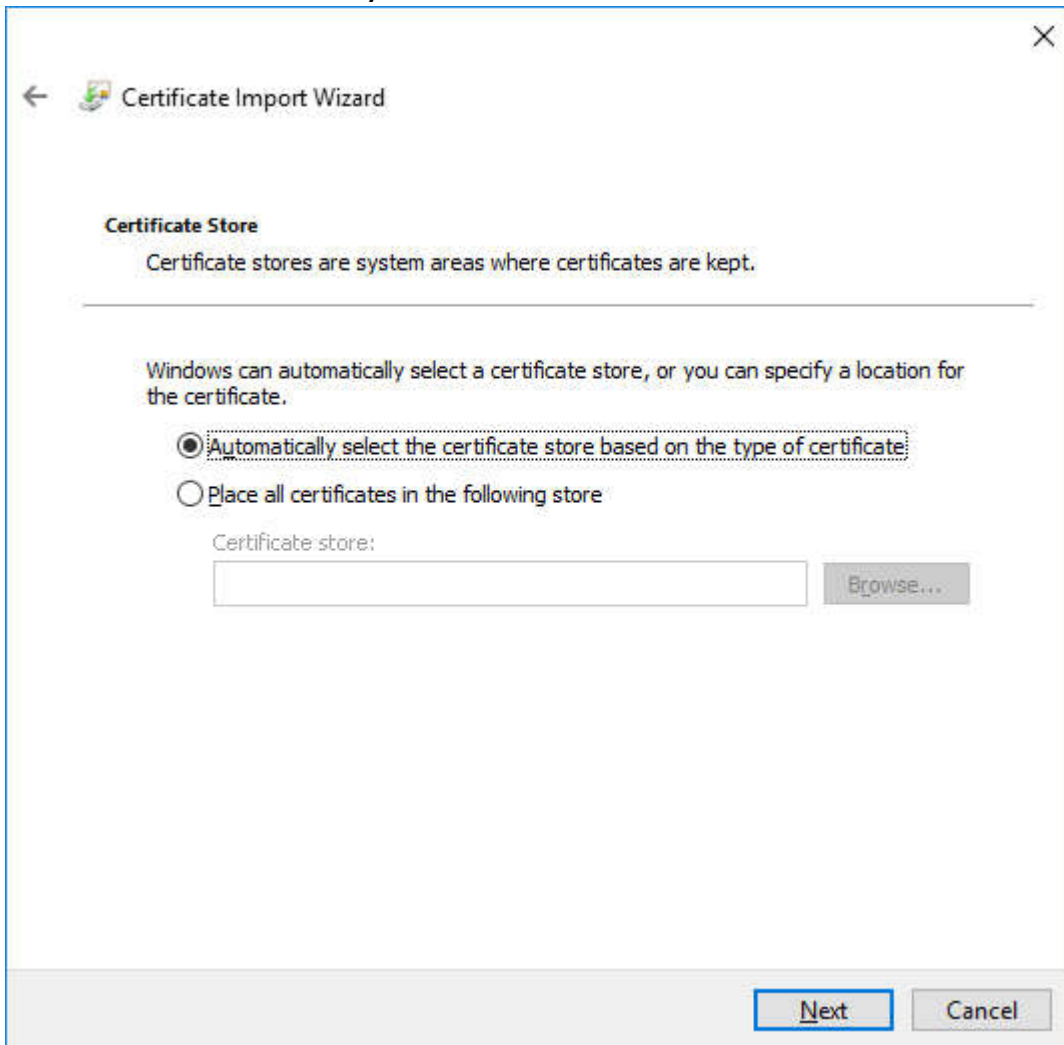
☐ Enable strong private key protection. You will be prompted every time the private key is used by an application if you enable this option.

☐ Mark this key as exportable. This will allow you to back up or transport your keys at a later time.

☒ Include all extended properties.

Next Cancel

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



The image shows a Windows 'Certificate Import Wizard' dialog box. At the top, there is a back arrow and the title 'Certificate Import Wizard' with a close button (X). Below the title bar, the section 'Certificate Store' is displayed, followed by the text 'Certificate stores are system areas where certificates are kept.' A horizontal line separates this from the next section. The next section contains the text 'Windows can automatically select a certificate store, or you can specify a location for the certificate.' Below this text are two radio button options. The first option, 'Automatically select the certificate store based on the type of certificate', is selected with a filled radio button. The second option, 'Place all certificates in the following store', is unselected with an empty radio button. Below the second option is a text label 'Certificate store:' followed by an empty text input field and a 'Browse...' button. At the bottom right of the dialog box, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a blue border.

← Certificate Import Wizard

**Certificate Store**  
Certificate stores are system areas where certificates are kept.

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Windows can automatically select a certificate store, or you can specify a location for the certificate.

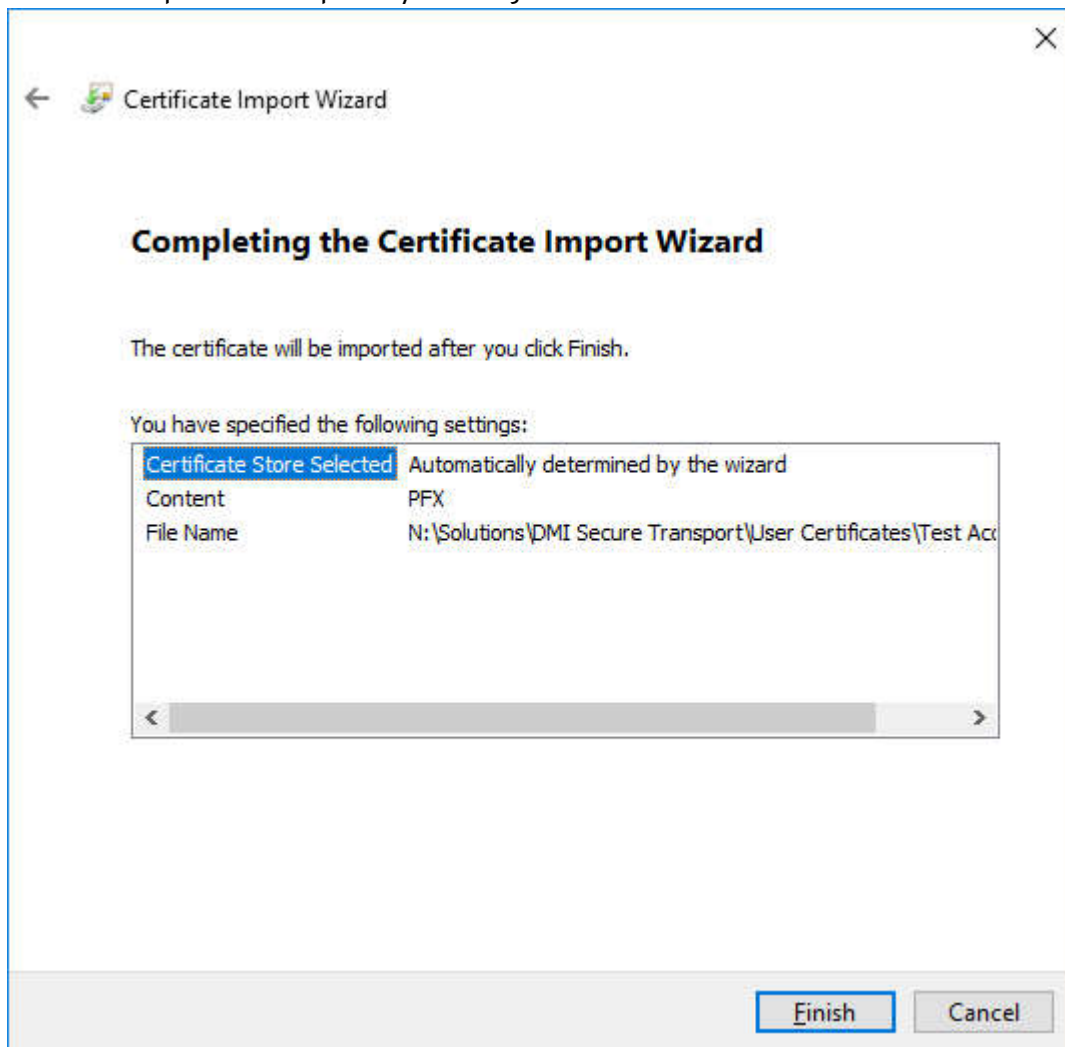
☒ Automatically select the certificate store based on the type of certificate

☐ Place all certificates in the following store

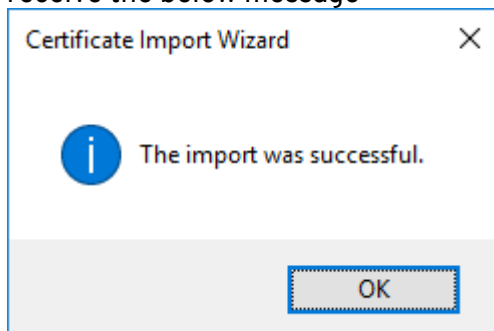
Certificate store:  
 Browse...

Next Cancel

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



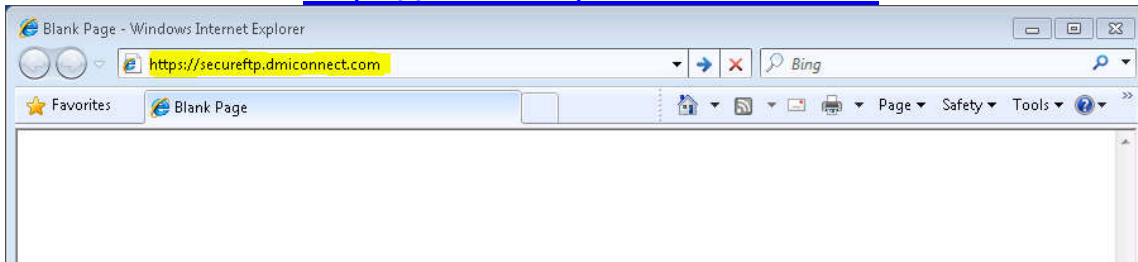
At this point you have imported the certificate in the Windows Certificate Storage and you will receive the below message



## Login at DMI Secure Transport

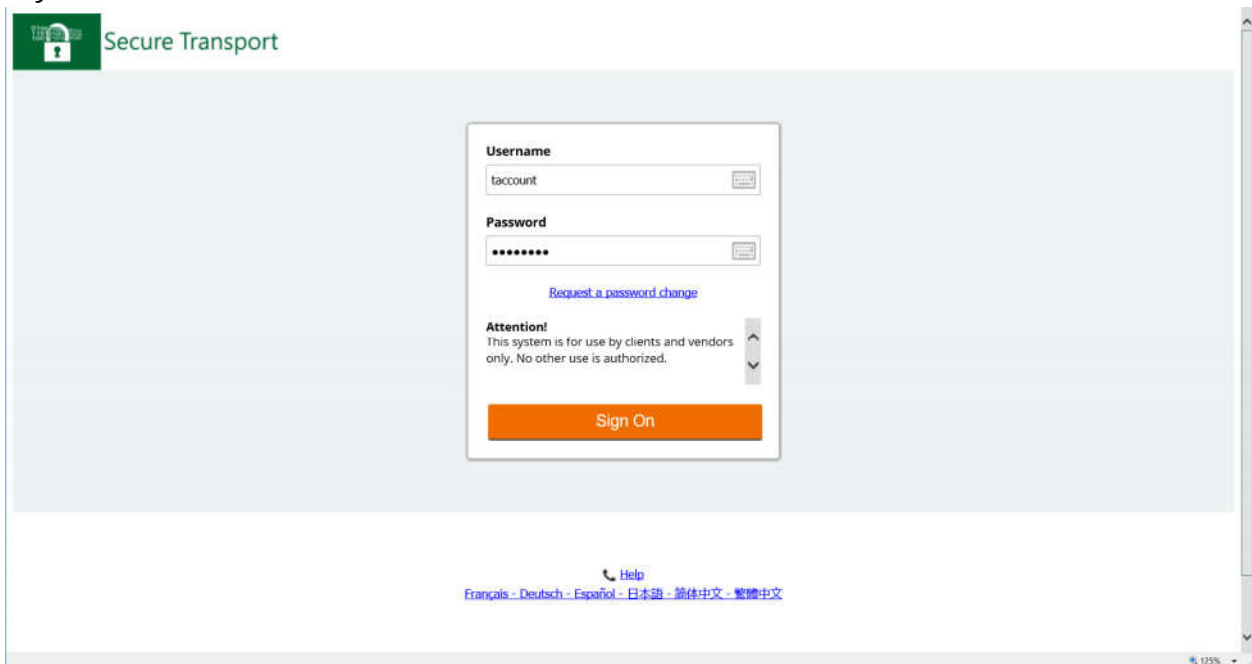
**STEP 1.** Using a supported web browser such as Internet Explorer or Google Chrome, you can connect to DMI Secure transport by entering the following URL:

<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.

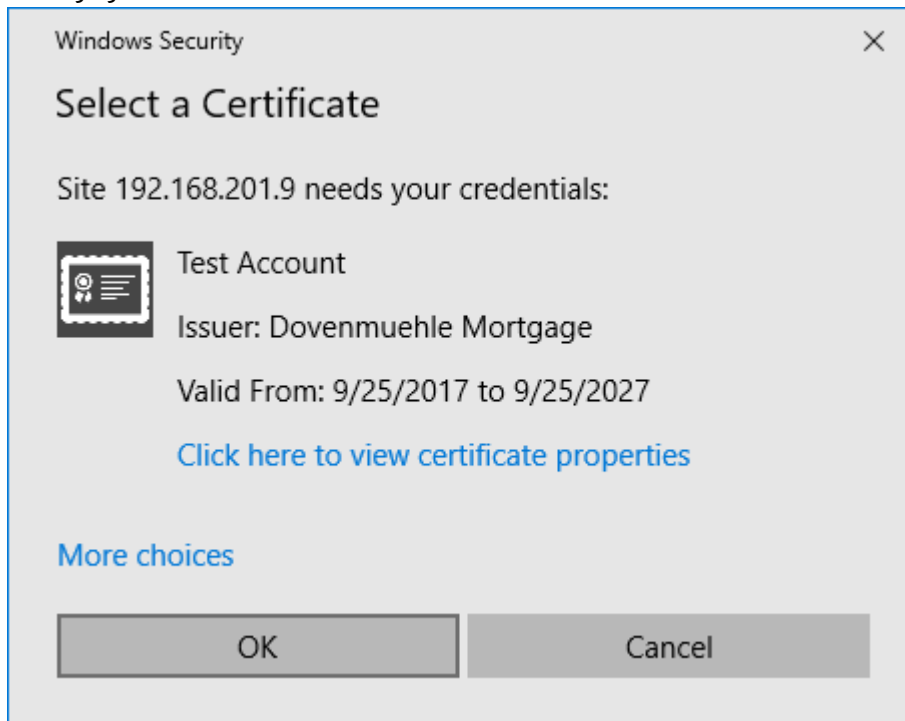


Note: if you don't remember your password, you can directly reset your password by clicking on **Request a password change**. It will send you an email to initiate the process to reset your password. (See the *Reset User Password* chapter in this guide)

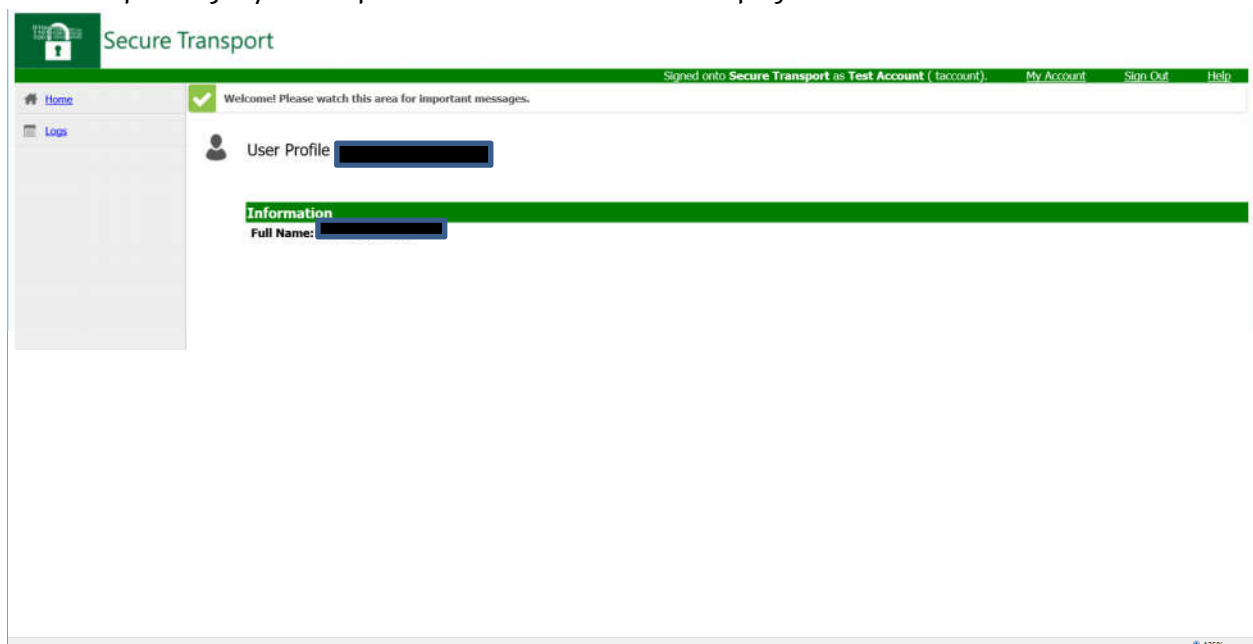
**STEP 3.** DMI Secure Transport will request to your web browser to use the certificate issued to you.

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

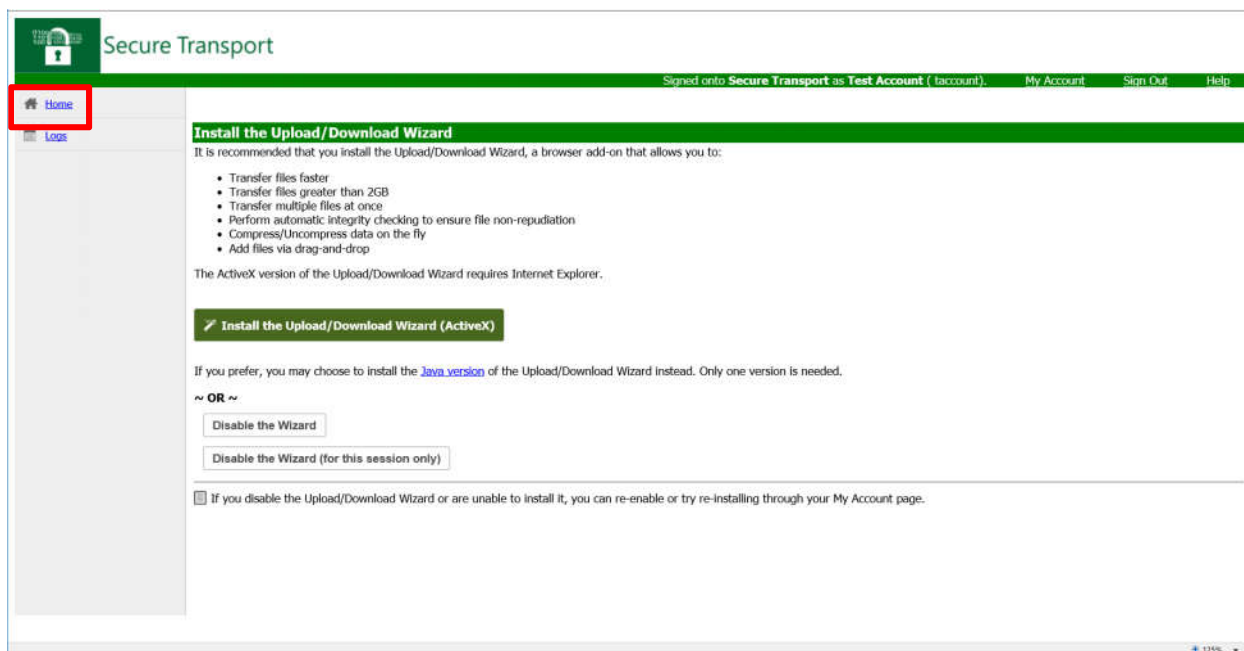
settings) If you are prompted to select a certificate, Select the one issued by Dovenmuehle Mortgage and click **OK**.



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



On left side of screen click on Home



The first time you will be asked 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.

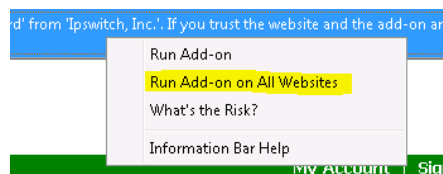
You can select to install the ActiveX (Internet Explorer only) by clicking on the bar message in the upper area, or by clicking on **Install the Upload/Download Wizard** link.

You can install the **Java version**.

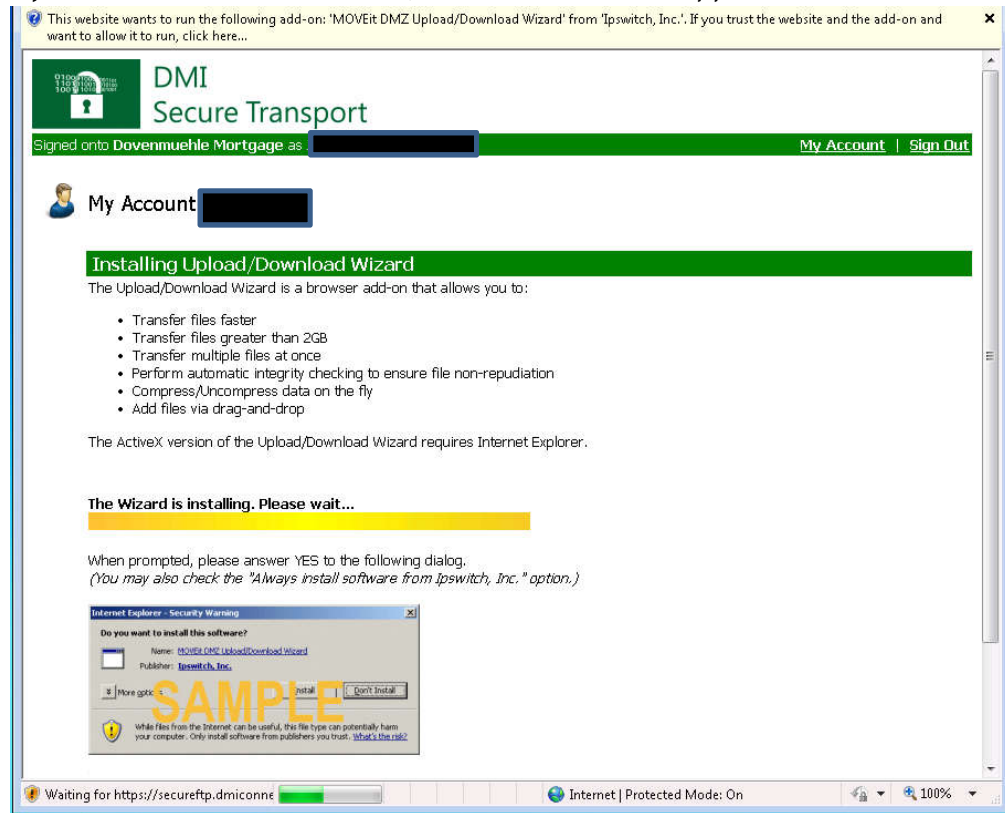
Or you can select to not install the wizard by clicking on **Disable the Wizard**.

NOTE: If you choose to install the Upload/Download Wizard; you may require assistance from your IT Department.

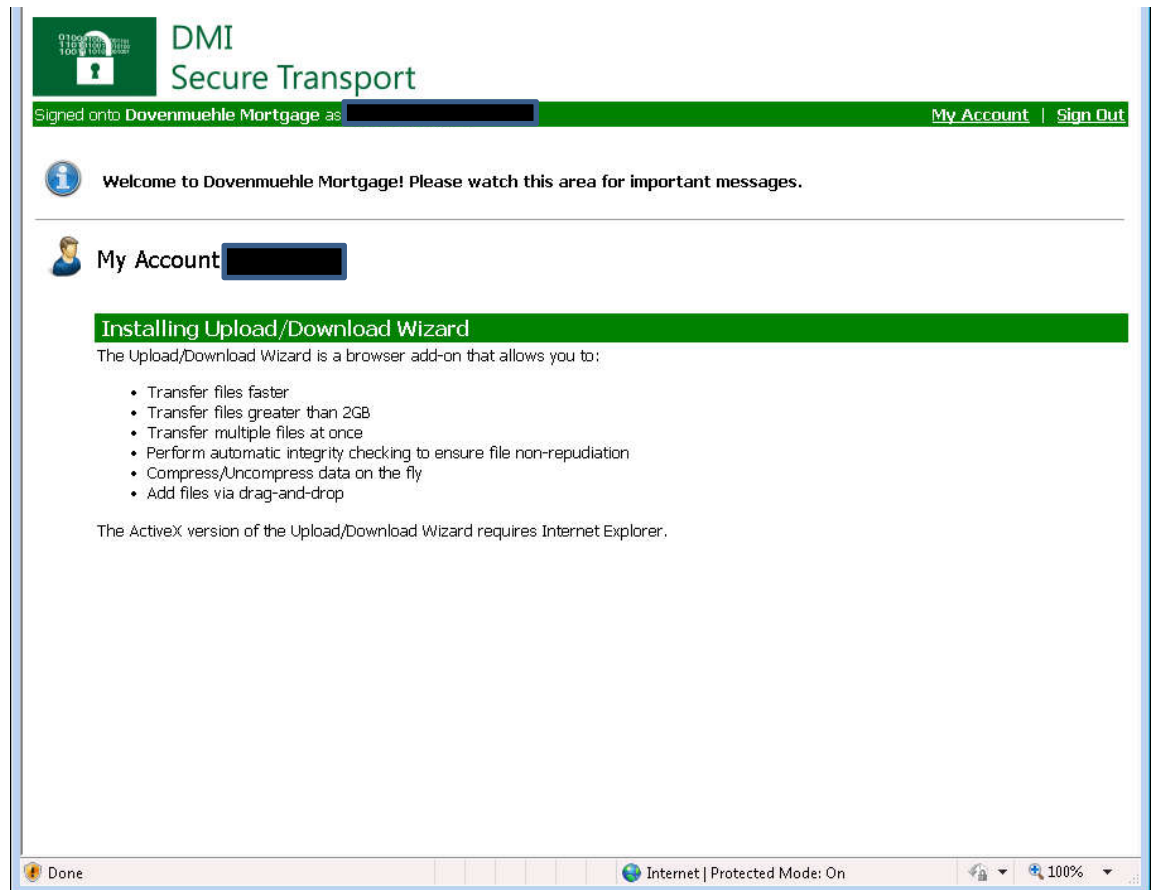
**OPTION A.** If you select the ActiveX and click on the upper message bar, you must select the option to **Run Add-on on All Websites**.



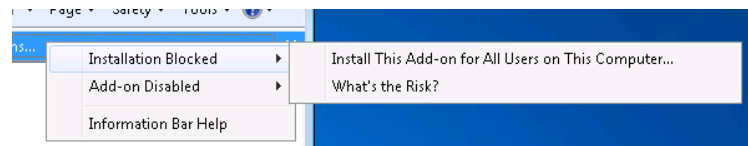
**OPTION B.** If you select the ActiveX and click on **Install the Upload/Download Wizard** link, it will download the application.



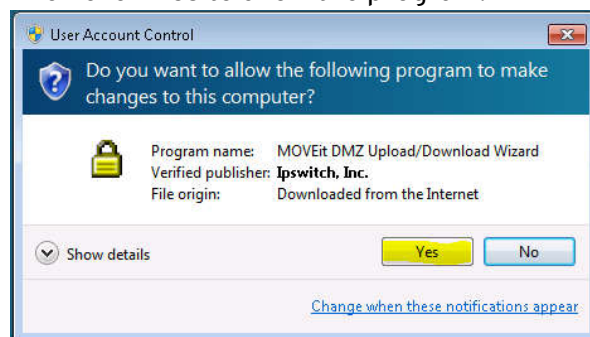
Then it will ask you to click on the upper message bar.



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

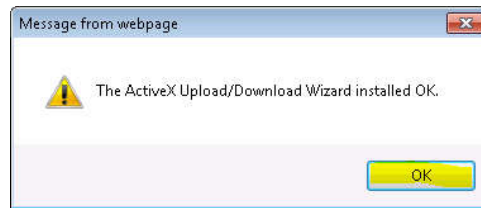


Then click **Yes** to allow the program.

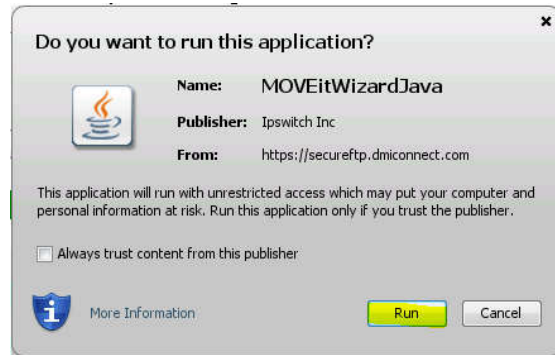


Click **OK** on the successful installation window.

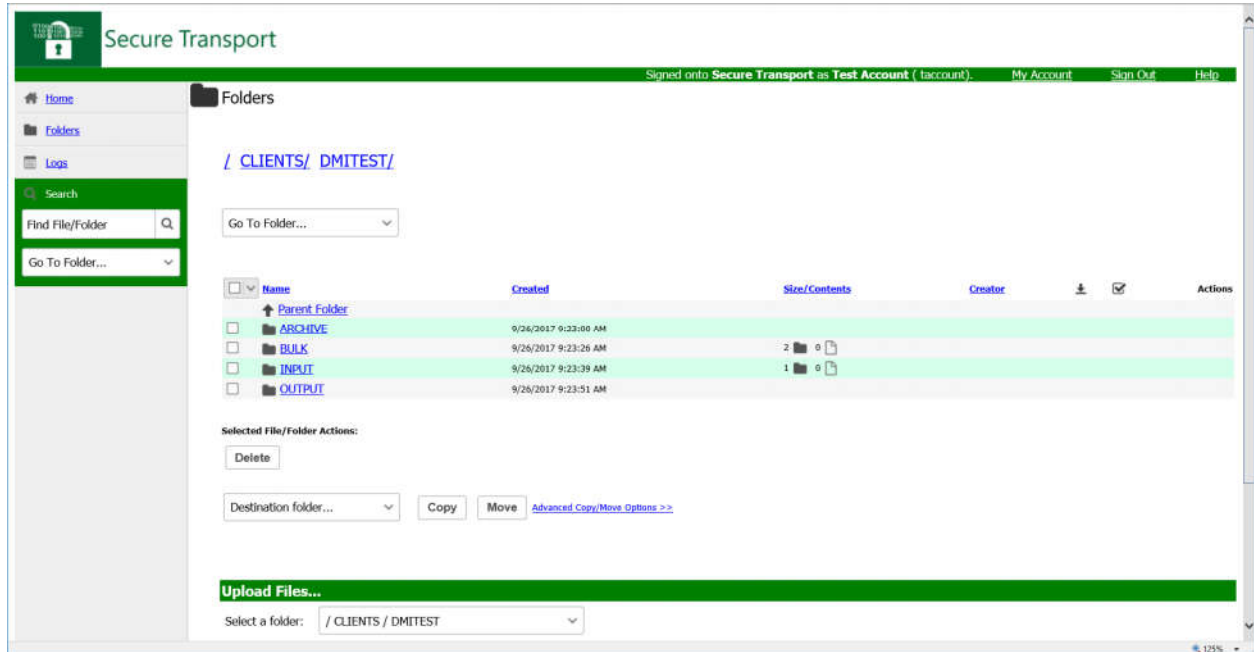




**OPTION C.** If you select to install the Java version, you need to click on **Run** on the Java authorization window.



**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

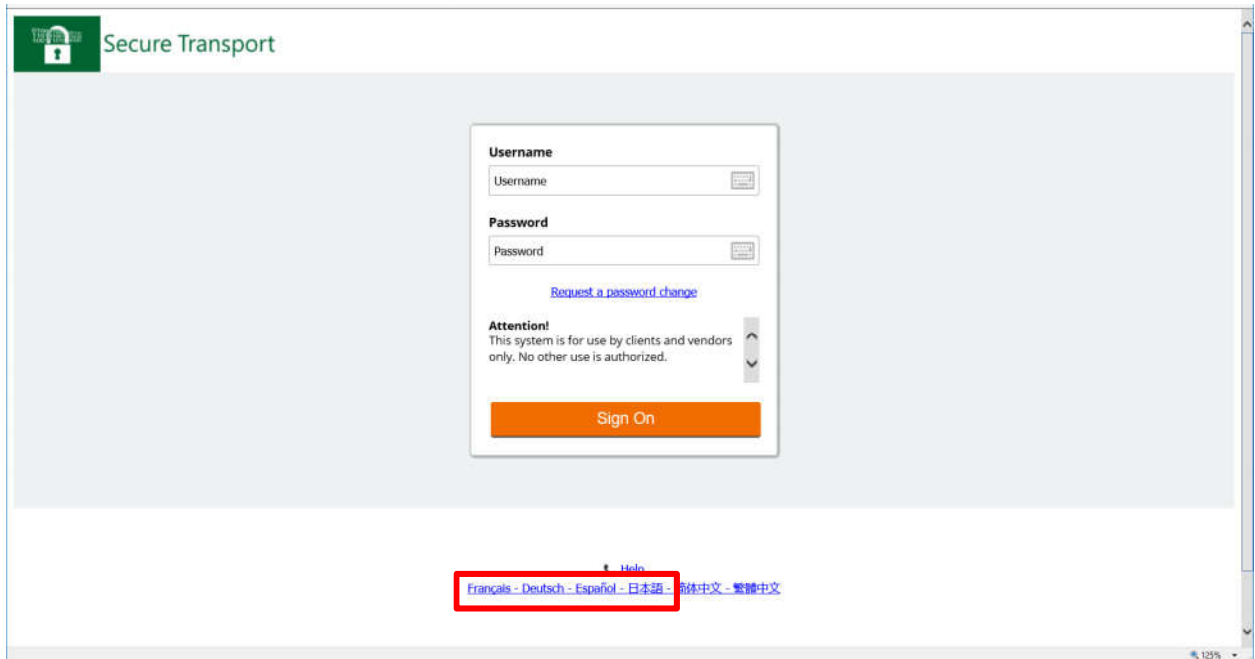


can request it directly on the login page for DMI Secure Transport at <https://secureftp.dmiconnect.com>

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 90<sup>th</sup> 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

**Secure Transport**

[? Forget Your Password?](#)

**Password Change Request**

Please enter your username below and then click the "Request Password Change" button. An email message with more information about the password reset process will be sent to your registered email address. This message may ask you to click on a link to reset your password. If it does, you have 120 minutes to do so before the link expires. If no link is provided in the message, or if you do not receive a message within 60 minutes, you will need to contact your administrator to reset your password.

Username:

[Return to the sign on page](#)

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

**DMI Secure Transport**

**Change Password Request Successful**

Your Change Password Request has been successfully submitted. Please check your registered email for further instructions on how to change your password and access the system.

[Return to the sign on page](#)

**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=89058&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.

The screenshot shows the DMI Secure Transport web interface. At the top, there is a green header with the DMI logo and the text "DMI Secure Transport". Below the header, it says "Signed onto Dovenmuehle Mortgage as [redacted]" and "My Account | Sign Out". A message icon indicates "You are required to change your password now." Below this, there is a "My Account" section with a user icon and a redacted name. The main content area is titled "Change Password..." and lists requirements for the new password: "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.", and "Must contain both upper- and lower-case letters." There are two input fields for "Enter your New Password:" and "Enter your New Password Again:", both with yellow highlights. Below these fields is a "Change Password" button. The browser address bar shows "https://secureftp.dmiconnect.com/" and the status bar indicates "Internet | Protected Mode: On" and "100%".

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.

 DMI  
Secure Transport


 Invalid username/password or client certificate, or not allowed to sign on from this location.

English - [Español](#)

Sign On

Username:

Password:

 Sign On

**Attention!**  
This system is for use by Dovenmuehle Mortgage Clients and Vendors. No other use is authorized.  
  
Any accounts idle for more than 60 calendar days are subject to de-activation.

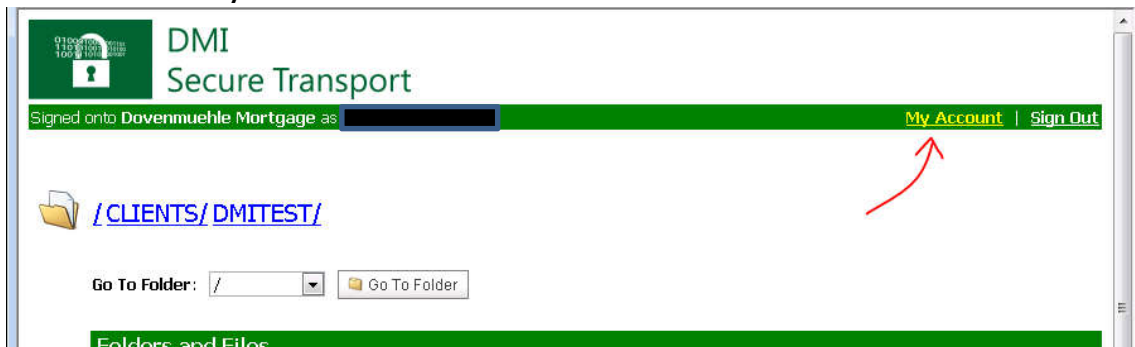
Need Help? [Tech Support](#) - [Online Manual](#)

Forget your password? [Request a password change](#)

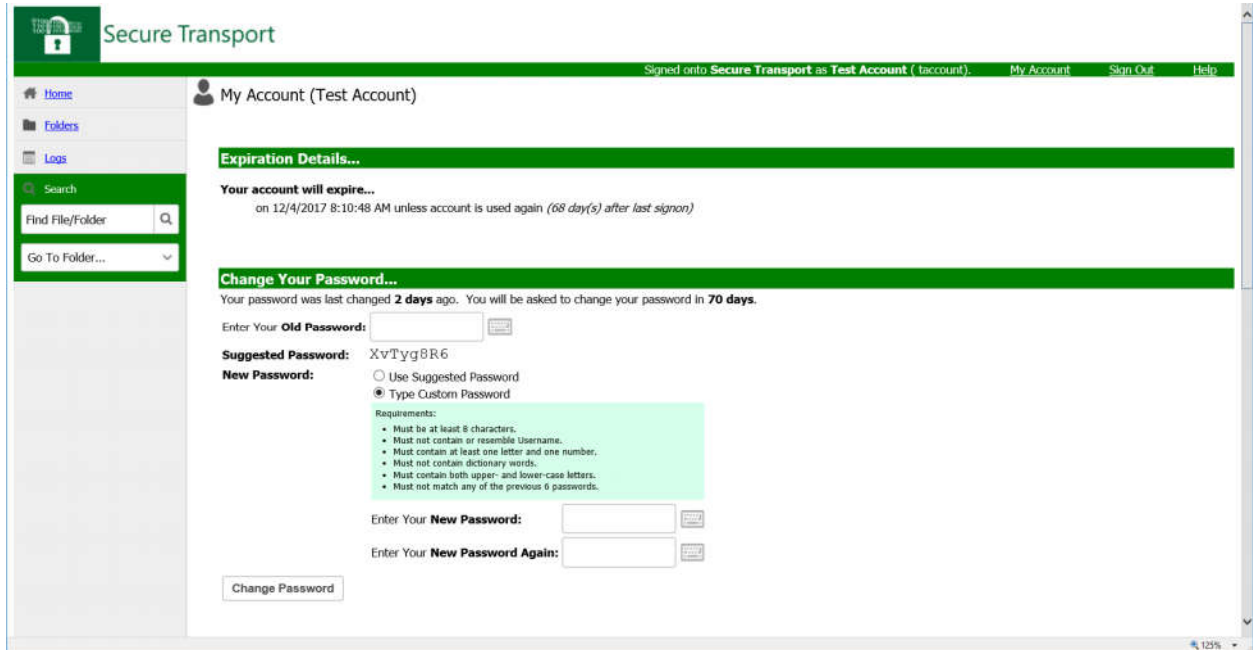
## How To Change Your Password

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.

The screenshot displays the DMI Secure Transport web application. At the top, a green header bar contains the DMI logo, the text "Signed onto Dovenmuehle Mortgage as [redacted]", and links for "My Account" and "Sign Out". Below the header, a yellow notification box states "Changed user password OK.". The main content area is titled "My Account" with a user icon and a redacted name. It features four green section headers: "Change Your Password...", "Edit Your Notification Settings...", "Edit Your Display Settings...", and "Edit Your Upload/Download Wizard Settings...". The "Change Your Password..." section includes fields for "Old Password", "Suggested Password" (Bb4ZLj j h), and "New Password" with radio buttons for "Use Suggested Password" (selected) and "Type Custom Password". It also has a "Change Password" button. The "Edit Your Notification Settings..." section shows the "Email Address(es)" as miguel.ruiz@dmicorp.com, a note about specifying multiple addresses, a "Preferred Email Format" section with "HTML" selected, and a "Change Notification" button. The "Edit Your Display Settings..." section shows "File/Folder Entries Per Page" set to 100 and a "Change Display" button. The "Edit Your Upload/Download Wizard Settings..." section shows the status of ActiveX and Java upload/download wizards, with links to change their status. At the bottom of the content area is a yellow "Return to Home Page" button. The browser's status bar at the very bottom shows "Trusted sites | Protected Mode: Off" and a zoom level of 100%.

DMI Secure Transport

Signed onto Dovenmuehle Mortgage as [redacted] [My Account](#) | [Sign Out](#)

**Changed user password OK.**

**My Account** [redacted]

**Change Your Password...**

Enter Your **Old Password:**

**Suggested Password:** Bb4ZLj j h

**New Password:** ☒ Use Suggested Password  
☐ Type Custom Password

Now press the "Change Password" button:

**Edit Your Notification Settings...**

**Email Address(es):**   
*You may specify multiple email addresses - separate each address with a comma (,).*

**Preferred Email Format:** ☒ HTML ☐ Text

Now press the "Change Notification" button:

**Edit Your Display Settings...**

**File/Folder Entries Per Page:**

Now press the "Change Display" button:

**Edit Your Upload/Download Wizard Settings...**

**Upload/Download Wizard Status:**

The ActiveX Upload/Download Wizard is Installed and Enabled  
[Change Upload/Download Wizard Status \(ActiveX Version\)](#)

The Java Upload/Download Wizard is Disabled  
[Change Upload/Download Wizard Status \(Java Version\)](#)

[Return to Home Page](#)

Trusted sites | Protected Mode: Off 100%

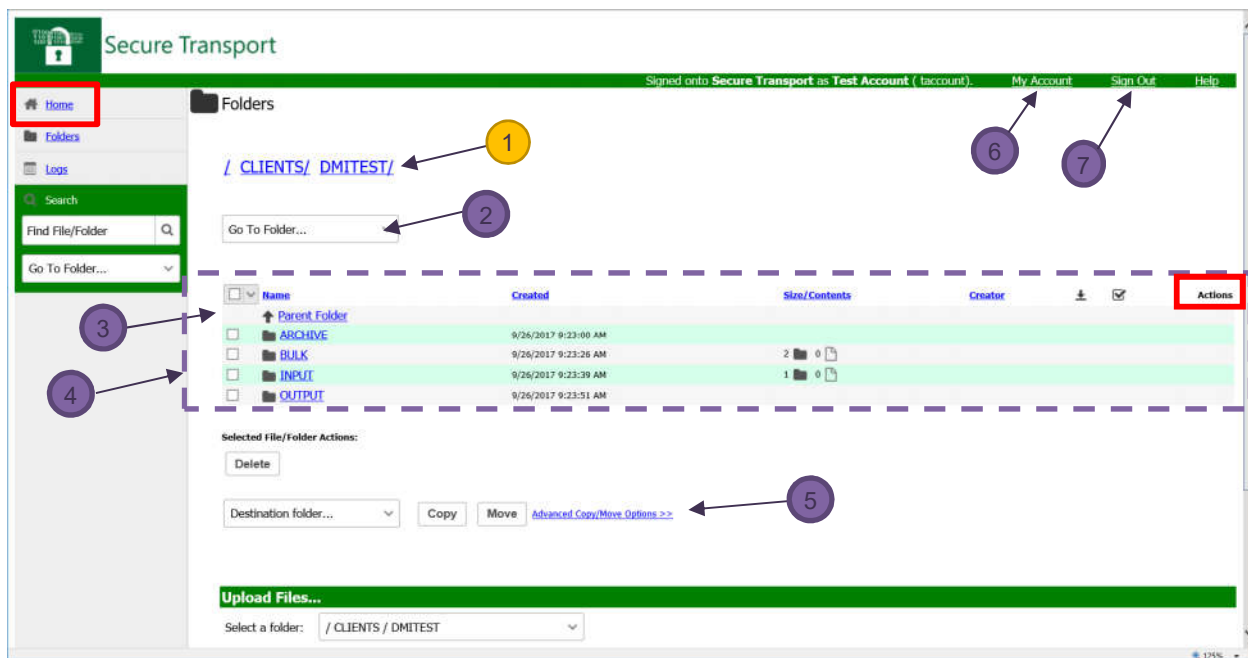
# 2

## 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.

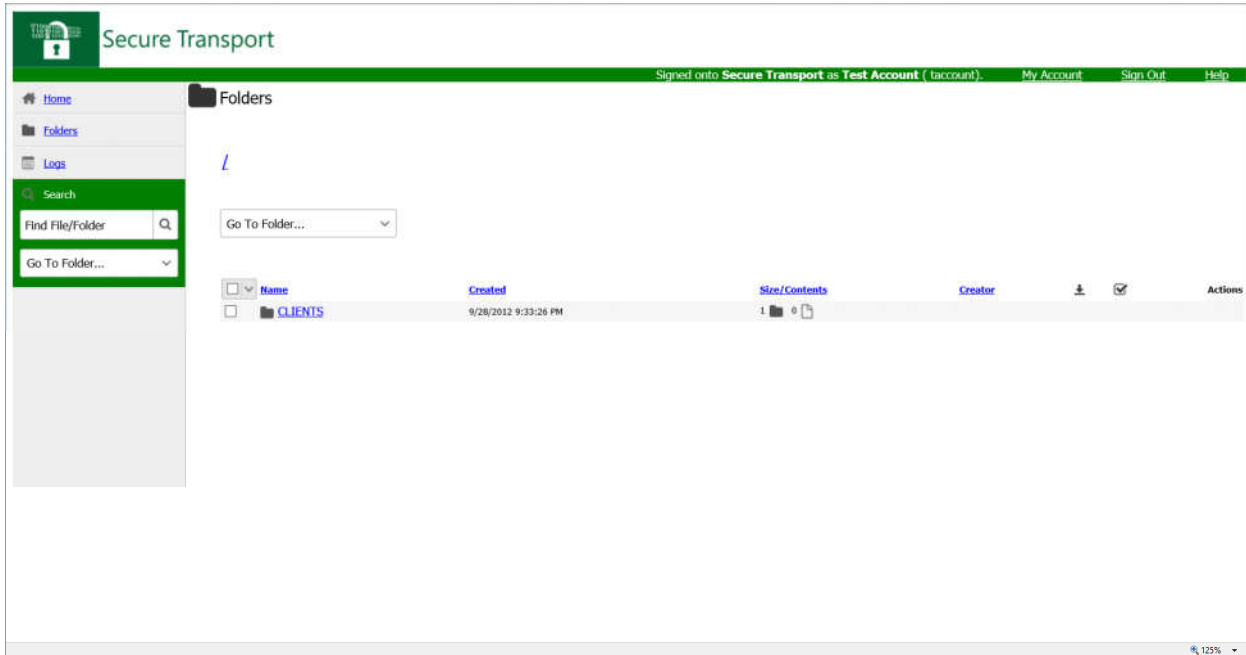
### 7. Sign Out

Logout from *DMI Secure Transport* application.

## Folders

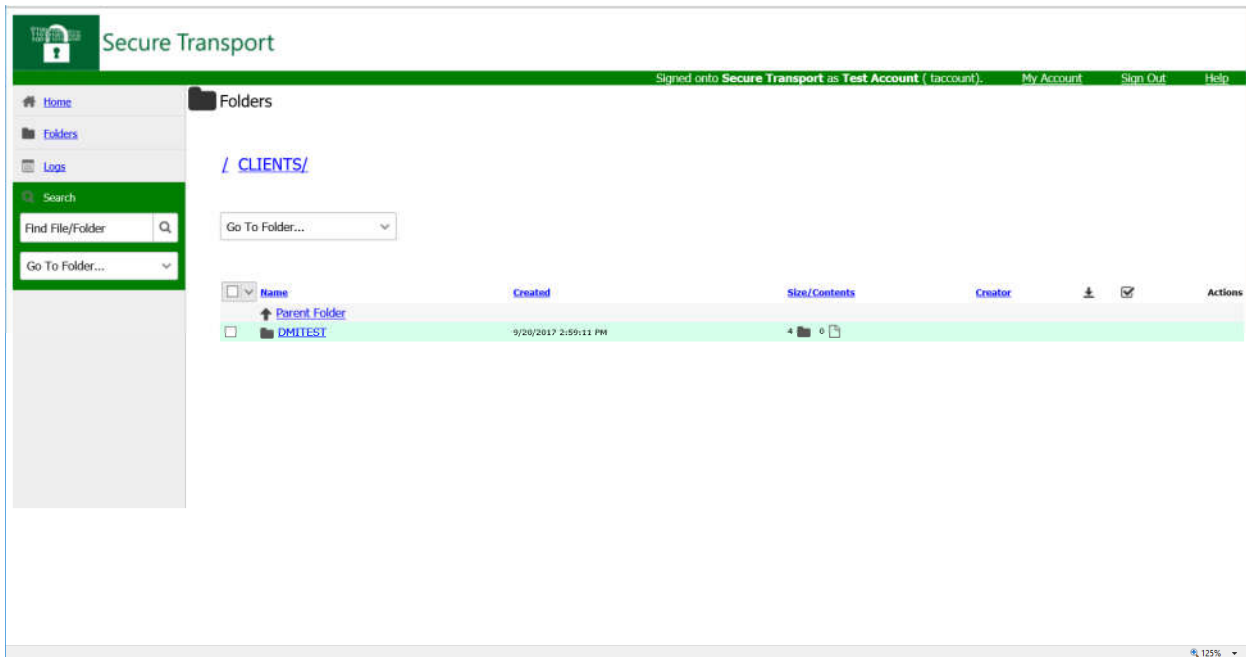
Lists Folders that your account has access to.





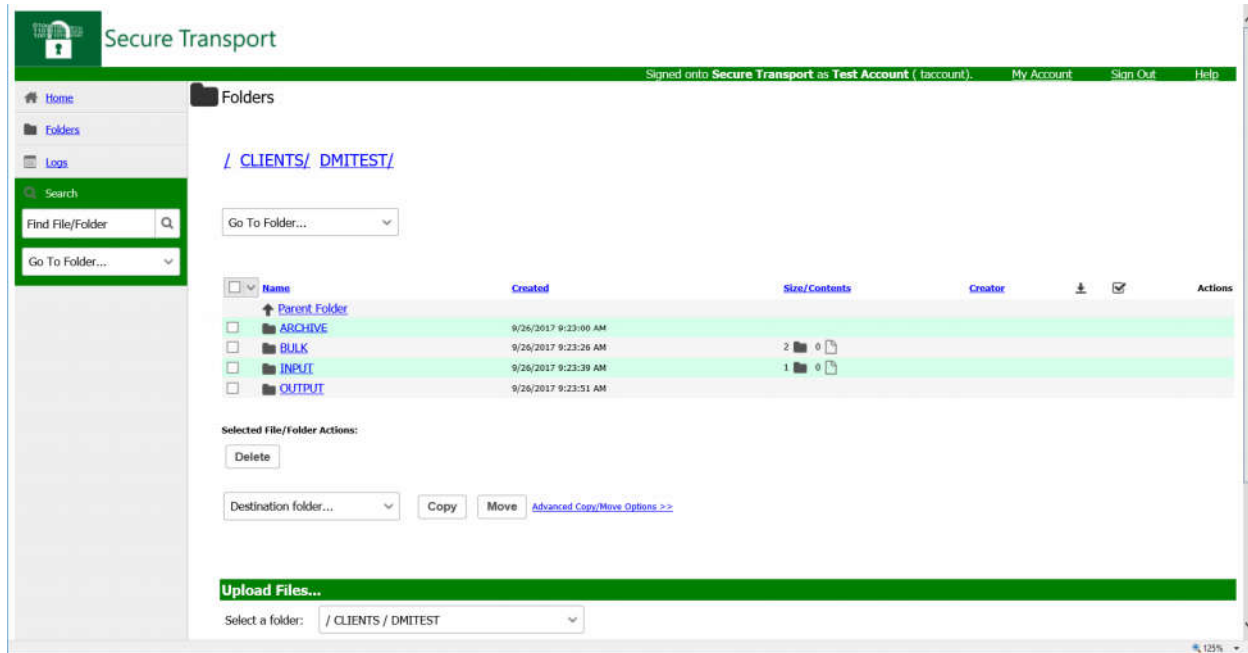
Click on

Clients to see list of Client folders available



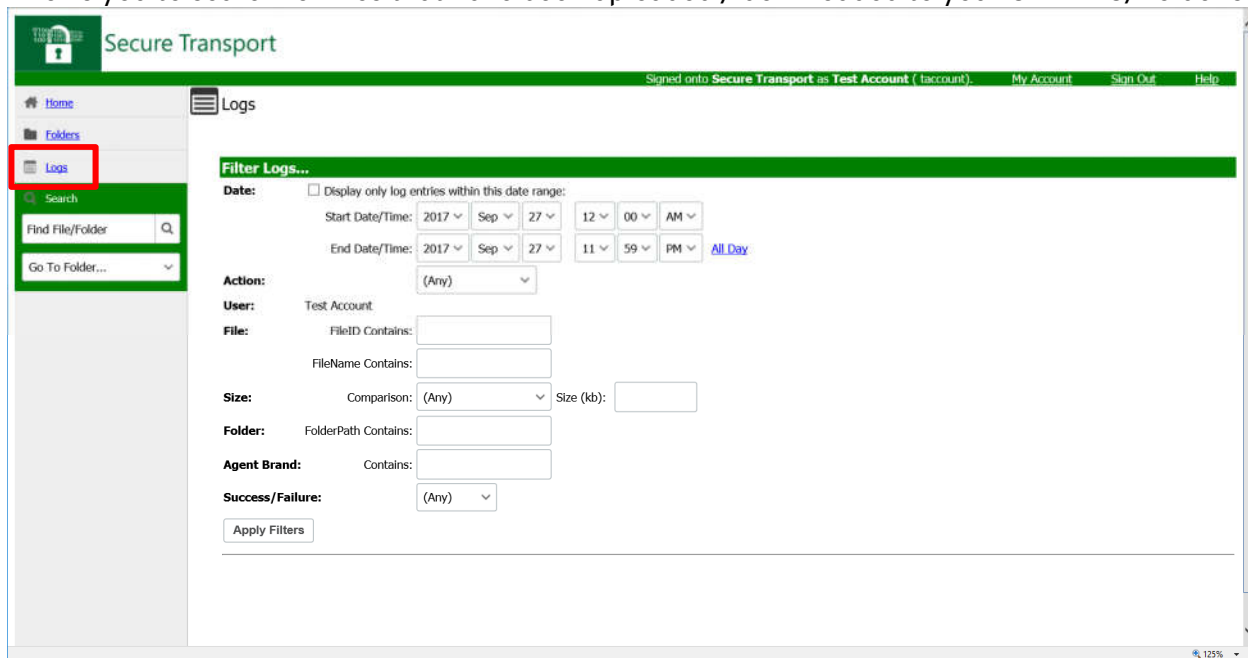
Click on

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.



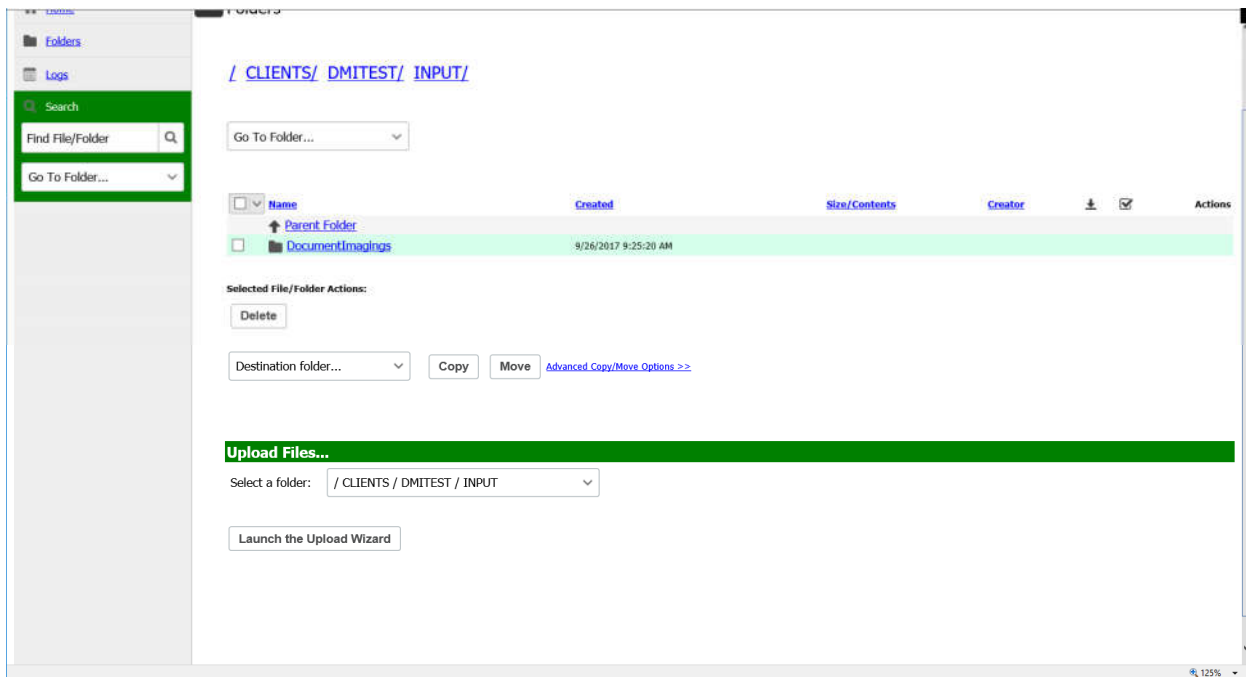
# 3

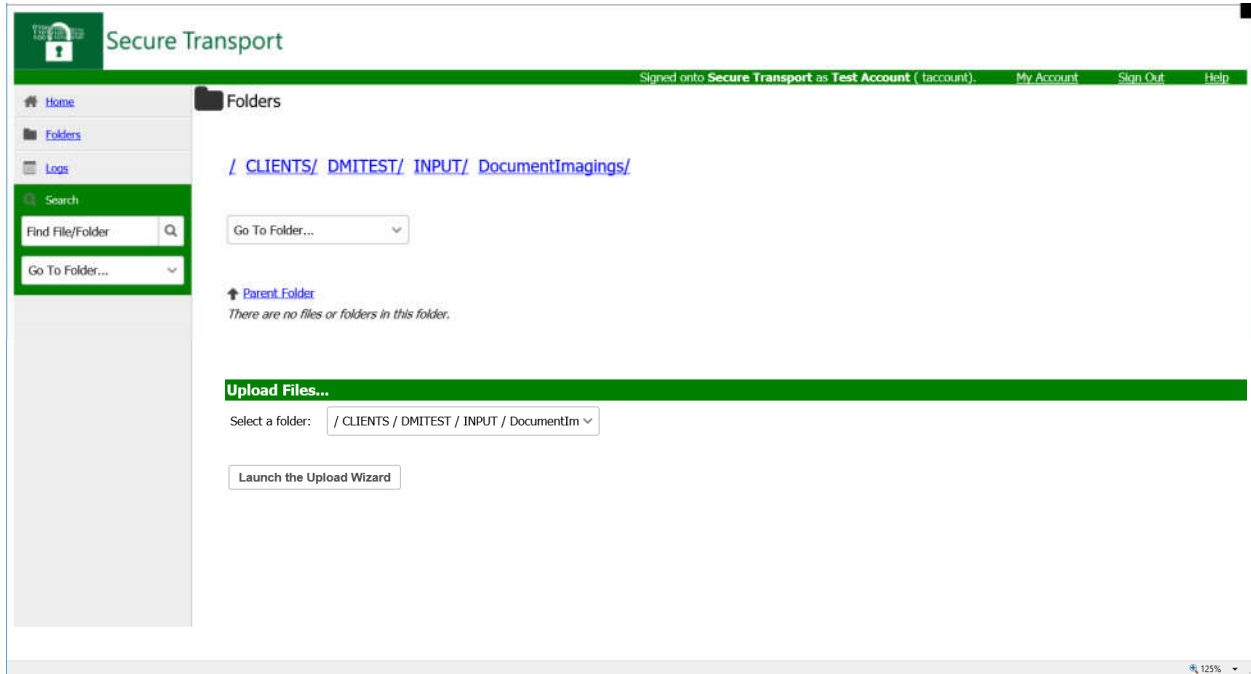
## Transferring Files

### Upload Files

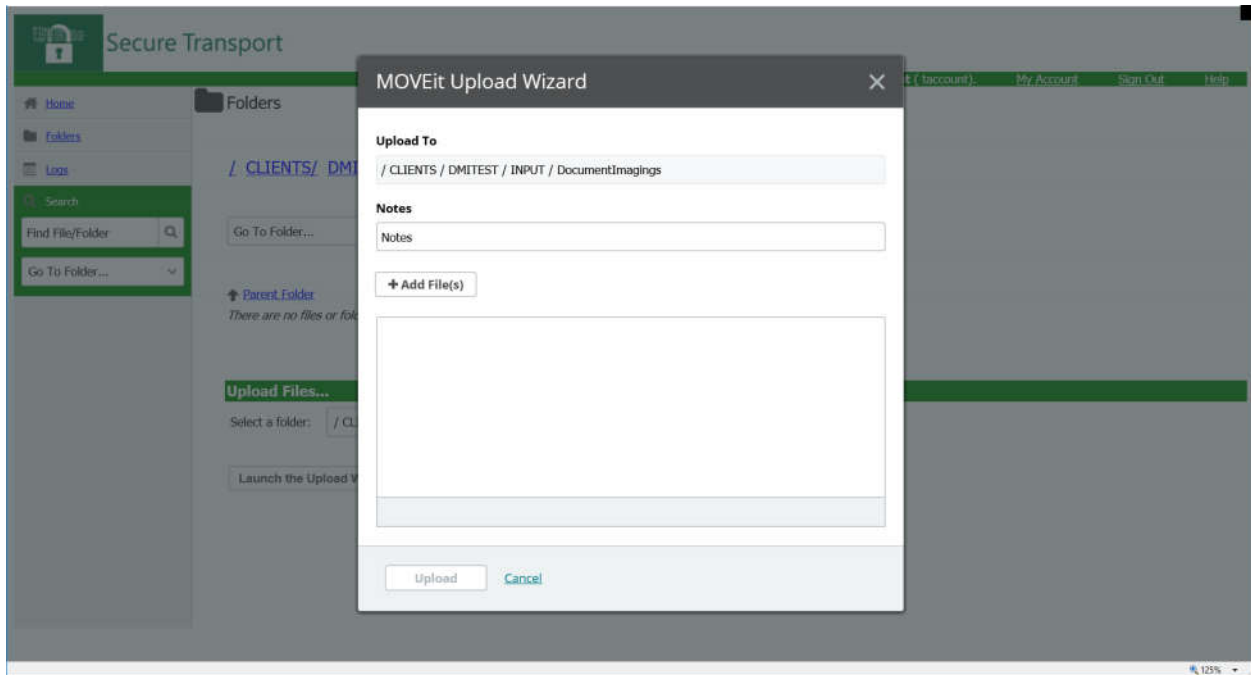
You can upload files to *DMI Secure Transport* mainly using the **Input** folder. For bulk data files you can use the **Bulk** folder.

**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

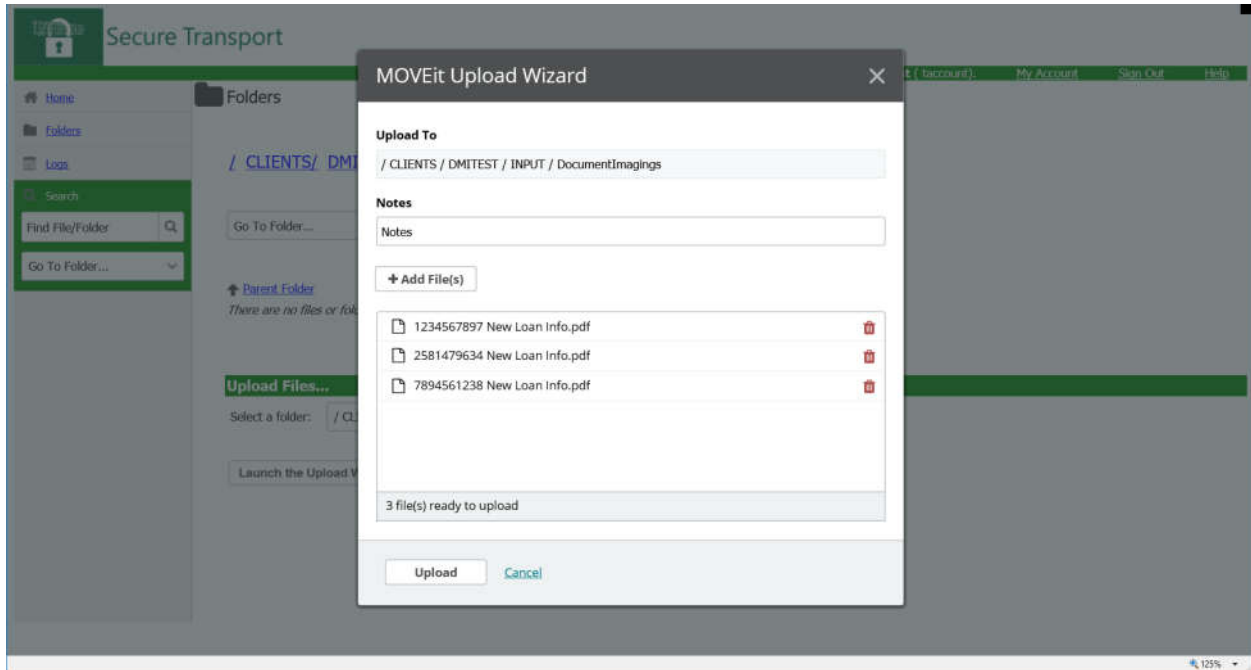




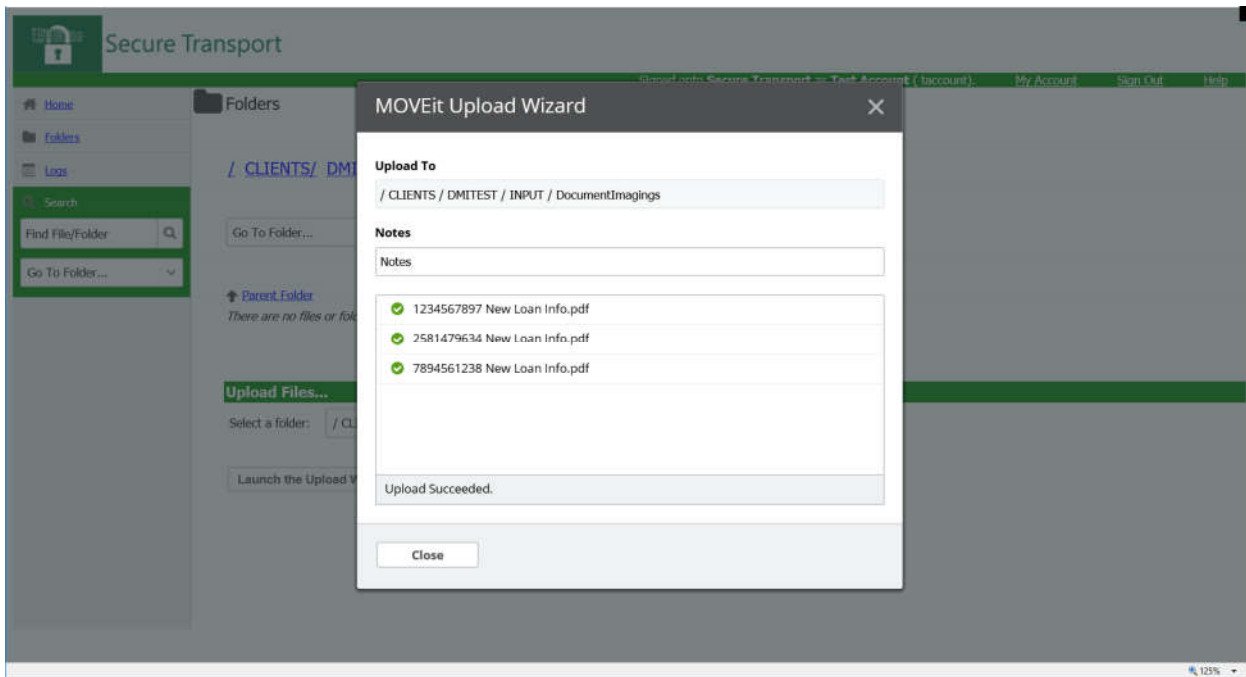
**STEP 2.** Click on Launch the Upload Wizard



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

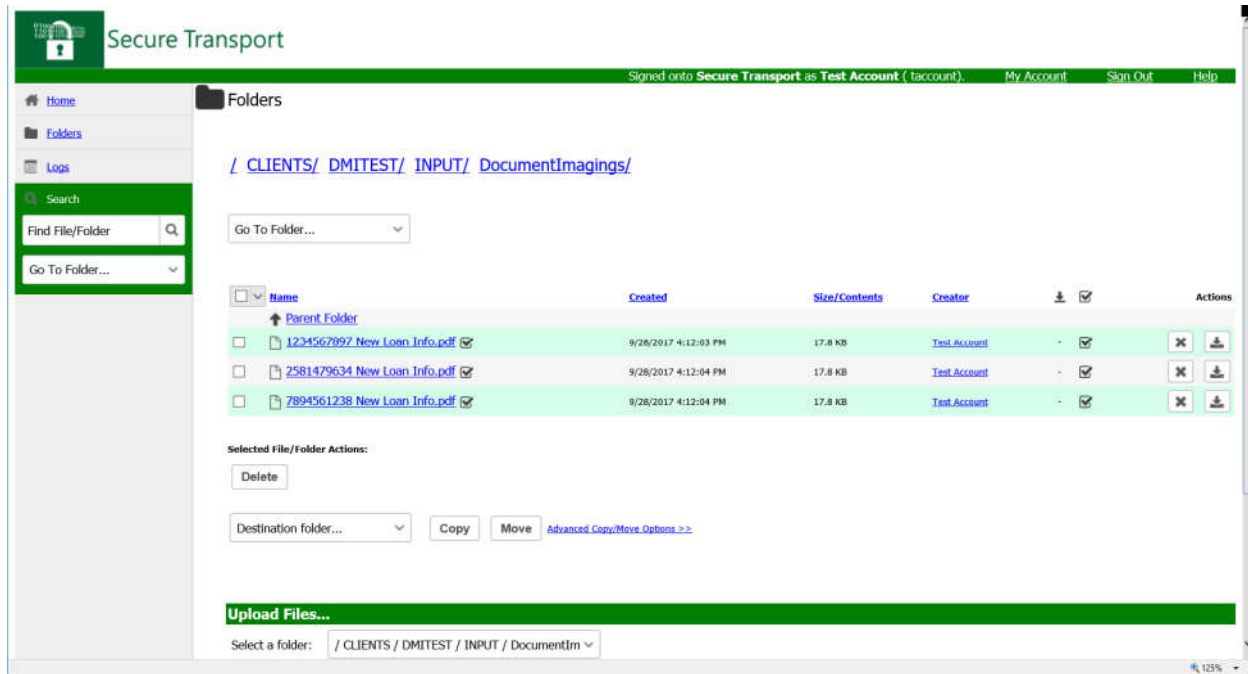


**STEP 4.** When the upload is complete a screen will appear with files that have uploaded. Select Close.



**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.

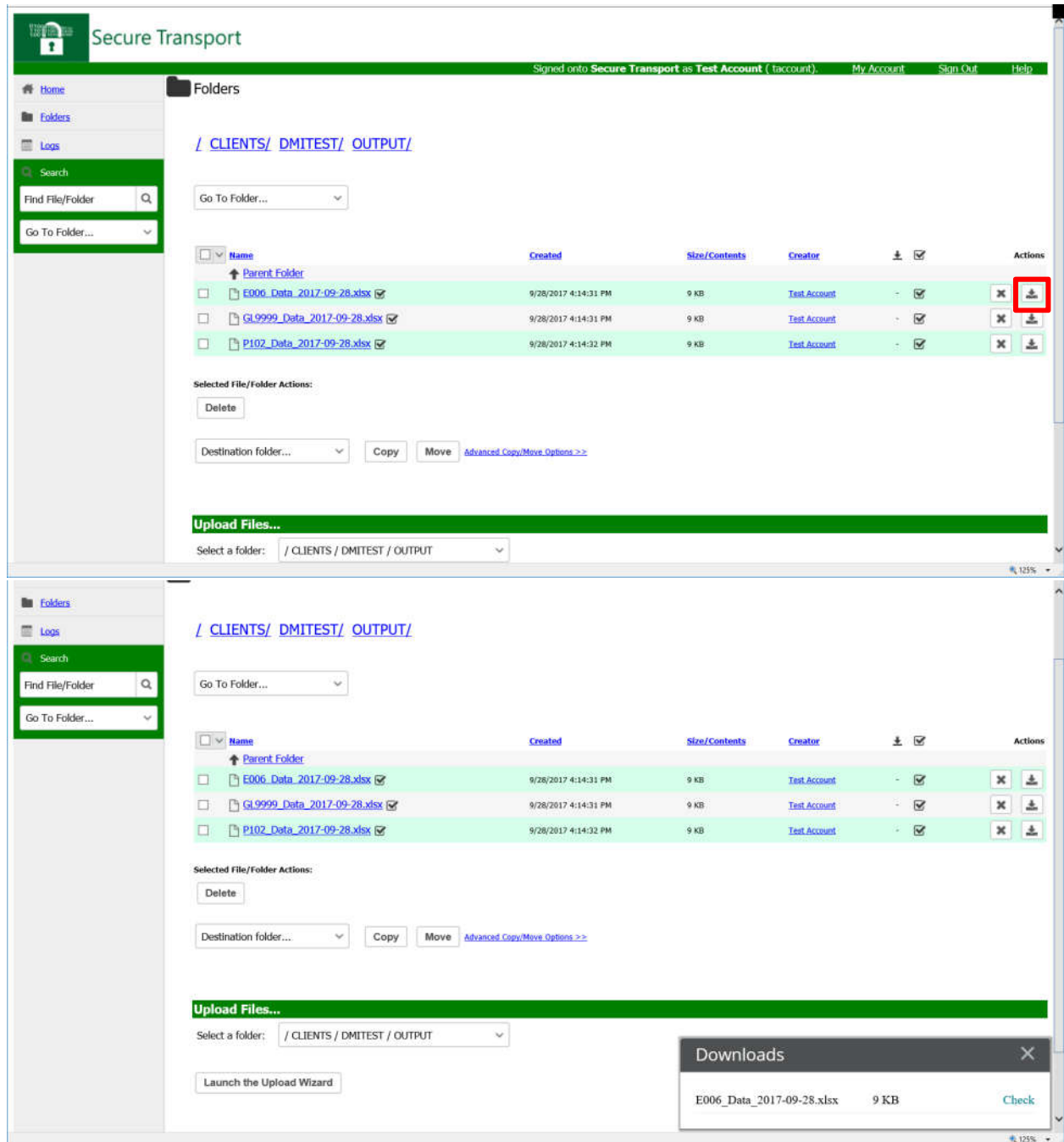


## Download Files

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

Do you want to open or save P102\_Data\_2017-09-28.xlsx (9.95 KB) from 192.168.201.9?

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.