FORTRA

GoAnywhere MFT
Customer Care Manual

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About this Guide

The *GoAnywhere Customer Care Manual* describes the product support and professional services available to customers of GoAnywhere products.

Customer Care is provided to you in three key areas:

- **Product Support** - GoAnywhere customers have access to phone and email support, live chat, a Customer Portal for communicating issues and downloading products, a rich library of PDF and online help technical support documentation, as well as user-driven forums.

- **Training** - GoAnywhere Essential Training is our comprehensive training program that covers GoAnywhere MFT workflow features, file transfer features, and GoAnywhere Gateway.

- **Technical Services** - GoAnywhere Technical Services Consultants provide our premium integration, development, and consulting services.

Product Support

This section describes the types of product support available to GoAnywhere customers.

Product Support Policy

The products covered by this support policy are GoAnywhere MFT and GoAnywhere Gateway. Support Services (as listed below) are provided for the product's licensed modules you own, as long as the maintenance fees are current (paid up) for those licenses. Maintenance renewal includes the following services:

- Telephone support from technical consultants on product or related technical questions
- Access to the our customer portal website to download product fixes and enhancements
- Access to required product enhancements to support new versions of the operating system
- Refinements and updates to the software product
- New versions of the software product
- Ability to transfer license to a different server

If you want to reactivate maintenance at a future time after cancellation you will be required to purchase the software again in full at current list prices.

Support Services

Regular Support Services

U.S. Support Services are provided by Fortra during our normal business hours, which are from 7 a.m. to 6 p.m. (Central Time Zone), Monday through Friday, excluding holidays. Support for international customers is provided by Fortra Partners or the Fortra office in

your region. International customers should contact your sales representative to confirm the terms and services offered by them. Support Services includes:

- Helping to resolve product installation issues *

- Troubleshooting potential product failures *

- Providing product fixes as needed (only for the latest publicly released version of the product)

- Answering questions on product operation, within reason. Please note that product training is not within the scope of regular support services (see GoAnywhere MFT Training).

*Due to the array of open support tickets, often not caused by product defects or determined not to be an issue with the product itself, the support case may be closed and transitioned to paid services for work not covered by the M&S contract, such as:

1. Product training, installations, upgrades, migration, health checks as defined in the Technical Services Section below.
2. Pre-paid T&M hours for dedicated Adhoc assistance on:
   a. Diagnose and resolve user-generated errors, troubleshoot business-specific logic
   b. Helping to diagnose and resolve connectivity issues (e.g., invalid IPs, invalid domain names, network issues, firewall rules, internet issues, etc.)

The support team might also require the Customer to open a separate case with its third-party vendor for issues related to Non-Fortra products like Operating Systems, Hardware, Antivirus, Vendor security programs, etc in finding a resolution.

Fortra Tech support can only provide Root Cause Analysis (RCA) when the cause is a Fortra product defect. Fortra does not offer RCA for causes not related to product defects.

A support technician will ensure you are informed ahead of time if a case is to transition to a services engagement.

Emergency Support

Emergency Support Services are available outside of Fortra business hours and includes the following services:

- Helping to resolve product installation issues for disaster recovery purposes *
- Troubleshooting potential product failures that are causing critical production problems *

* If it is determined that the product is performing to its written specifications, then Emergency Support Services will be billable to the customer at $375 per hour, with a minimum of a 1 hour charge.

Planned events, such as upgrades or configuration changes, that take place outside of business hours are not covered under Emergency Support. In order to best assist with planned events, we recommend taking advantage of our Technical Services team.

In order to assist Fortra to reasonably troubleshoot and correct product failures, you will need to provide the requested job logs, screen shots and other related information in a timely fashion. You may be required to upgrade to the latest publicly released version of the product to solve your issue or to receive product fixes/patches from Fortra.

Support Contact Information

Fortra support can be contacted toll free at 1-800-949-4696 or +1-402-944-4242 if you are dialing outside of the USA. Email support is available at goanywhere.support@helpsystems.com during Fortra business hours.

You are encouraged to visit the knowledge base at http://www.goanywheremft.com/forum/ to find answers to common questions. Please note that Fortra support policy and rates are subject to change.

Service Level Expectations

Severity Level	Definition / Eligible Product(s)	Initial Response	Ongoing Status Updates
Sev 1 - Critical	The issue causes a complete loss of service and you cannot reasonably continue using the software in this state. A production business-critical software component (system, full product or database level failure) is completely inoperable and a workaround does not exist. **NOTE:** A phone call is required to meet the service goal.	1 Hour	Daily
Sev 2 - High	The issue causes a severe loss of service. You can continue work in a limited capacity, but you may have an alternative method or workaround for the issue. The issue impacts a business-critical software component (system, full product or database level failure) in the production environment. **NOTE:** A phone call is required to meet the service goal.	4 Business Hours	Every 2 Business Days

| Sev 3 - Normal | The issue causes a minor loss of service. You can continue work despite an inconvenience or non-critical issue with the software. A standard software component in the production environment could have limited restrictions in its use. | 1 Business Day | Every 7 Business Days |
| Sev 4 - Low | A non-critical software component is malfunctioning in the production environment causing moderate to minor impact or a non-technical request is made. | 2 Business Days | Every 10 Business Days |

*Critical Error

A Critical Error is defined as an error in the product that has caused one of the following hardships for the Customer: 1) corruption or inaccessibility of their data 2) a complete work stoppage or 3) an impact on Customer revenue.

Response Goal

A Response Goal is measured from the moment a case number is created to the point where progress is made toward the resolution of the case – usually the initial call back on a case.

Resolution Goal

A satisfactory resolution may not be immediately available or provided with the initial response, in which case Fortra will use commercially reasonable means and effort to provide a resolution within a reasonable period.

Customer Portal

The GoAnywhere Customer Portal is where you can create support requests, check the status of a support case, download software and documentation, and manage your

GoAnywhere product licenses. You must create an account in order to use the portal and license GoAnywhere software.

The portal can be access by using your internet browser and navigating to the following url:

https://my.goanywhere.com
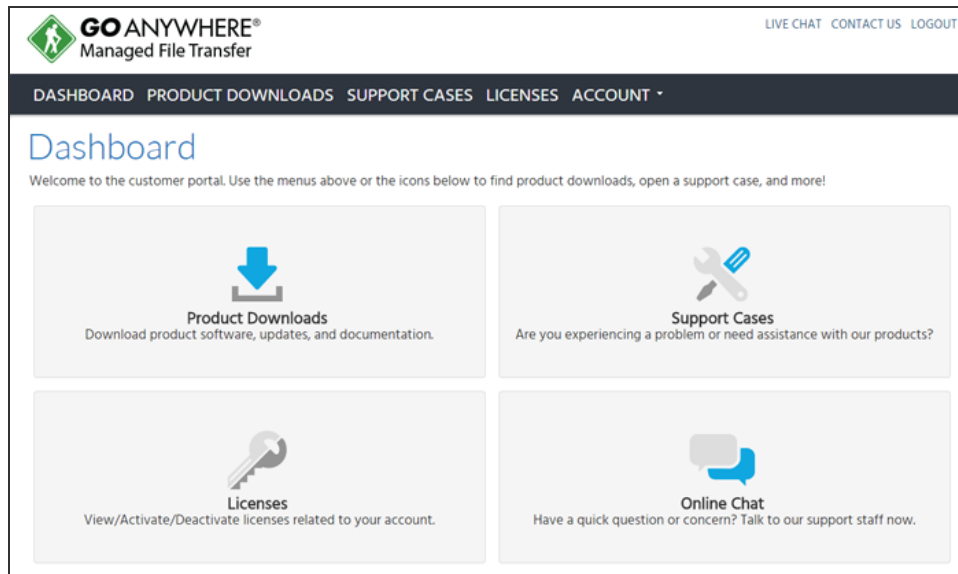
Create Account

To create a free account:

1. Open your web browser and navigate to https://my.goanywhere.com.

2. Fill out the **Create a free account** form and then click **Create Account**.

3. The **Details** page appears. Fill out the remaining fields and then click **Continue**.

4. An email will be sent to your email address with a verification code. Paste the code into the provided box and then click **Continue**.

5. Once you complete registration, you will have limited access to the portal, and be provided a 7-day limited trial license for GoAnywhere MFT. You will be provided full access to the portal after a Fortra Support Specialist approves your account. Once your information is confirmed, your 7-day limited trial will be upgraded to a full 30-day trial.

Sign in to the Portal

To sign in to the portal:

1. Open your web browser and navigate to https://my.goanywhere.com.

2. From the Sign in pane, enter your **Email** and account **Password** and then click **Sign In**.

Downloading Software & Documentation

To download software and documentation:

1. Sign in to the Customer Portal.

2. Click the **Product Downloads** link from the Dashboard.

3. Choose a **Product** and the **Operating system** the product will be installed on.

4. Confirm you have read and understand the terms of the License Agreement.

5. Click the download link for the product you wish to download.

View Your Product Licenses

To view your GoAnywhere Product License(s):

1. Sign in to the Customer Portal.

2. Click the **Licenses** link from the Dashboard main menu.

3. License categories are organized by Paid, Evaluation, and Free. Click the ⏵ icon next to a license to view the enabled features.

Request a License

To request a GoAnywhere product license:

1. Sign in to the Customer Portal.

2. Click the **Licenses** link from the Dashboard main menu.

3. At the bottom of the Licenses page, click the **Request License** button.

4. Specify the following fields:

   - **Product** - Select the GoAnywhere product that will be licensed.

   - **Version** - Select the version of the GoAnywhere product that will be licensed.

   - **Operating System** - Select the operating system where the GoAnywhere product will be installed.

   - **Notes** - Include any other information that will help Fortra provide the correct license and features.

5. Click the **Request License** button.

Fortra will receive the license request, review your account, and either enable the license or contact you for more information.

Activating a License for GoAnywhere MFT

To activate a GoAnywhere MFT license, you must first have the product installed. Refer to the *GoAnywhere MFT Install Guide* for installation instructions.

1. Once the product is installed, navigate to the administrator:

   - In your browser, type the URL of **http://[hostname]:[portnumber]** where **[hostname]** is the host name or IP address of GoAnywhere and **[portnumber]** is the port number of the GoAnywhere Administrator. The default HTTP port for the Administrator is 800. Example URL: **http://localhost:8000**.

2. Click the **Get License** button.

3. Log in to the Customer Portal.

4. Identify an unused license, and then click **Activate**.

Activating a License for GoAnywhere Gateway

To activate a GoAnywhere Gateway license, you must first have the product installed. Refer to the *GoAnywhere Gateway Install Guide* for installation instructions.

1. Log in to the system where Gateway is installed.

2. Open a command line or terminal. (Windows users must run the command line as an Administrator.)

3. Change the working directory to the directory where Gateway is installed (for example, `cd [install_directory]`).

4. Run the command `./gagateway license.` Follow the instructions displayed on the screen to request a license. If a license is already installed, this command will display the current license information.

Once your license is activated on the Customer Portal, download the license to your workstation by clicking the **Download** button. You can also download the license at any time by expanding the **Active** license row and clicking the **Download** button under the license key.

Once the gateway.lic file is downloaded, copy the file to the installation directory on the GoAnywhere Gateway server that produced the license activation request.

Windows Example

- **Installation Directory**: C:\Program Files\HelpSystems\GoAnywhere Gateway
- **License File Location**: C:\Program Files\HelpSystems\GoAnywhere Gateway\gateway.lic

Linux/Unix Example

- **Installation Directory**: /usr/local/HelpSystems/GoAnywhere_Gateway
- **License File Location**: /usr/local/HelpSystems/GoAnywhere_Gateway/gateway.lic

Once the license has been placed in the correct installation directory, you must stop and then start the GoAnywhere Gateway service.

The activated license exclusively belongs to the GoAnywhere Gateway installation that produced the activation request. It cannot be used to upgrade or run any other install of GoAnywhere Gateway.

Deactivating a License

For instructions on deactivating a GoAnywhere product license, see the **License** page in the product specific user guide.

Temporary Licenses for Disaster Recovery and Upgrade Testing

Fortra can provide temporary licenses for disaster recovery and upgrade testing. The total number of days for these temporary licenses cannot exceed 60 days per calendar year. If more than 60 days is needed, a license will need to be purchased or leased. Contact your sales manager for more information.

Creating a Support Case

Use the following instructions to open a **Support Case** with Fortra:

1. Sign in to the Customer Portal.

2. Click the **Support Cases** link from the Dashboard.

3. The Support Cases page appears. Click the **Create Support Case** button.

4. Populate the following fields:

    - **Type** - Select the type of problem to report.

    - **Title** - Enter a brief description of the problem.

    - **Description** - Enter a detailed description of the problem. Include steps to recreate the issue and any other details that will help a Fortra Support Specialist to quickly understand the problem.

    - **Product Name** - Select the product that is encountering the issue.

    - **Product Version** - Enter the version number for your product.

    - **Operating System** - Select the operating system the product is installed on.

5. Click **Submit**. The case will appear in the Get Support table on the previous screen.

The support case will be answered by a Fortra Support Specialist in accordance with our Product Support Policy.

Submit a Feature Request

Use the following instructions to submit a feature request for Fortra products:

1. Sign in to the Customer Portal.

2. Click the **Support Cases** link from the Dashboard.

3. The Support Cases page appears. Click the **Feature Request** button.

4. Download the Request Form (docx). Fill out the form in its entirety, and then email the form to our support team at goanywhere.support@helpsystems.com.

Invite Users

You can invite other users to view and create support cases for your organization. Use the following instructions to invite another user:

1. Sign in to the Customer Portal.

2. Click the **View Users** link from the Main-Menu bar.

3. Click the **Invite User** button.

4. Specify the email addresses of the individuals that you would like to invite to use this service. Separate multiple email addresses with commas.

5. Click the **Send Invitation** button.

Each recipient will receive an email containing a link to self-register. Final approval of each individual account is required by a Fortra Support Specialist.

Activity Report

The Activity for you and others in your organization is saved to the Activity Report. Use the following instructions to view the **Activity Report**:

1. Sign in to the Customer Portal.

2. Click the **Activity Report** link from the Main-Menu Bar.
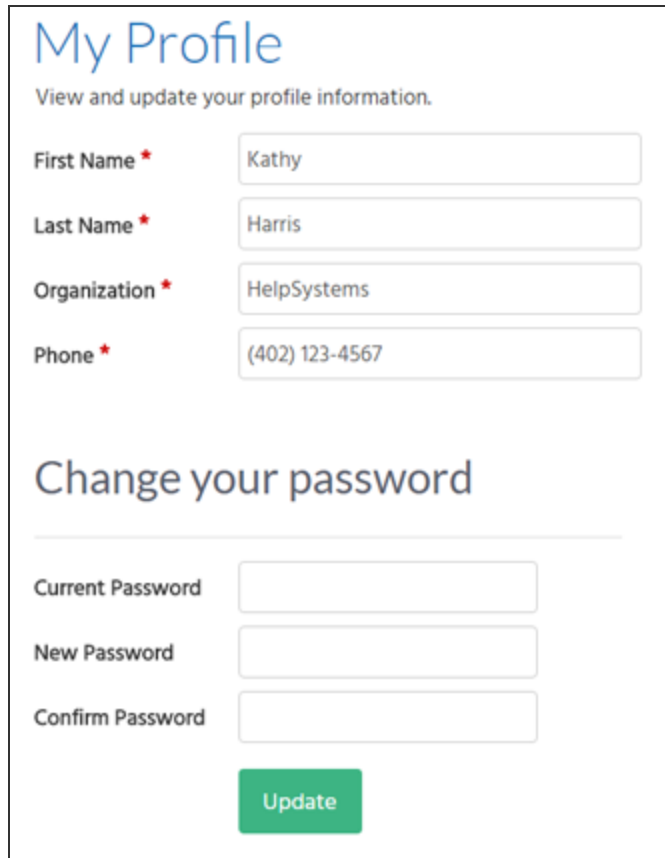
The following filter options are available:

- **Date Range** - Filter the results by the date the activity occurred

- **Status** - Filter the results by the type of status

My Profile

You can view and update your profile information from the My Profile screen.

Technical Documentation

Technical documentation can be downloaded from the Customer Portal, or accessed from within the Product. From within the product, navigate to **Help** > **Help Center** to find the user guide in HTML format.

Online Support Forum

Customers are active on our forums and discussing topics that may help you implement the software or troubleshoot. You can access the online support forum by opening your internet browser and enter the following url: http://www.goanywhere.com/forum/.

Email Support

Send an email to our support staff with any questions or problems at goanywhere.support@helpsystems.com.

To improve our response time to your inquiry, please include the following information in your email:

- Subject: A one-line description of the problem, including the issue priority found within the Product Support Policy Response Guidelines table.

  > **NOTE:**
  >
  > If your issue priority is high or urgent, Fortra recommends you call the product support line.

- Message: Please write a complete description of the issue, including the steps needed to reproduce the problem (the more detail, the better), what you expected to occur, and the text of any error messages you received. Also include:

  - Your company and contact information

  - Product name

  - Product version

- Attachments: Please attach the related system and/or job logs as well as any example screen shots

Phone Support

Phone Support is available per the terms of our Product Support Policy.

USA and Canada: 1-800-949-4696 option 2

Outside USA: +1-402-944-4242

Online Chat

For quick questions or clarifications, you can use our online chat service by opening your internet browser and entering the following url: www.goanywhere.com/support and then click the **Online Chat** link.

Technical Services

The section contains the professional consulting services offered to GoAnywhere customers. We provide two types of services: Prepackaged and Time and Material services. Prepackaged services predefined, with a limited scope of work. Time and Material (T&M) services are chargeable by the hour during regular business hours. After-hour rates are applicable when services are provided outside of regular business hours. Please note that purchased Technical Services expire 12 months from their purchase date and are nonrefundable and nontransferable.

Please contact your Fortra Account Representative for more information.

GoAnywhere QuickStart Service

When implementing new technology, you want to quickly get the most out of your security investment and protect your business. This includes minimizing risk and disruption to your business as you adopt new capabilities. Navigating and understanding all features and dependencies of an MFT solution is a challenge to customers that can add stress and a longer learning curve, increasing the timeline for your implementation. You also need to ensure that your MFT implementation follows best practices to maximize the value it provides.

Fortra offers the QuickStart Service for GoAnywhere MFT to ramp up your implementation and align it with best practices. Our experts will guide you through the design and deployment of GoAnywhere in your environment to enable secure file transfers. Once the Services are conducted, you'll have:

- Tailored installation and configuration of GoAnywhere aligned with best practices and optimal settings.
- An action plan with milestones for your project.
- Operational knowledge to keep your configuration up to date.

How it Works

We will deliver the services in four steps:

1. **Planning:** Our Technical Consultant will review and discuss in detail the architecture and prerequisites for your implementation. We will discuss your use cases and security requirements for optimal configuration as well as the steps needed and dates for going live.

2. **Installation and Configuration:** This includes activating the license, installation, and configuration of features according to your use cases and the QuickStart purchased (see table below).

3. **Validation:** Once the configuration is complete, we will work with you to validate your GoAnywhere deployment is working correctly. We will test protocols for internal and external connectivity, validate the database and confirm storage. And finally, we will perform a multi-point inspection checklist for production readiness and go-live.

4. **Handover and review:** Once the GoAnywhere installation and configuration are completed by the consultant, we will hand it over to you and train your team on basic administration and operations best practices.

Our QuickStart services are in alignment with our current licenses' bundles:

- Essential: Workflow Basic or Workflow Express bundles
- Core: Core Server + DMZ or Collaboration Bundle
- Standard: Starter Bundle
- Premium: Premium Bundle
- Enterprise: Enterprise Bundle

Below is the QuickStart scope of configuration for each service purchased:

	Essential	Core	Standard	Premium	Enterprise
Licensed Bundle Purchased	Workflows Basic or Express	Core Server + DMZ or Collaboration Bundle	Starter Bundle	Premium Bundle	Enterprise Bundle
Install and configure GoAnywhere nodes	X (up to 1)	X (up to 1)	X (up to 2)	X (up to 4)	X (up to 4)
Install and configure GoAnywhere Gateway		X (up to1)	X (up to 2)	X (up to 4)	X (up to 4)
Resource configuration and testing	X (up to 3)		X (up to 2)	X (up to 10)	X (up to 15)
Set up Host PGP key pair and Import partner public PGP Key (up to 5)	X		X	X	X
Admin Authentication configuration	X	X	X	X	X
Set up ICAP project	X				X
Configure MFT Services (SFTP, FTPS, HTTPS)		X	X	X	X
Set up Web Client Brand		X	X	X	X
Configure up to five (5) simple workflows	X		X	X	X

	Essential	Core	Standard	Premium	Enterprise
Configure up to five (5) advanced workflows				X	X
Manual provisioning of accounts (up to 25) or automatic provisioning using a CSV file	X	X	X	X	
Configure Agent Projects with up to ten (10) tasks each			X	X	X
Configure GoDrive and set up accounts (up to 5)	X			X	X
Configure Secure Mail and set up accounts (up to 2) to use Secure Mail	X			X	X
Configure Standard Agents (up to 4)			X	X	X
Configure Advanced Agents (up to 4)					X
Configure Secure Forms (up to 2)				X	X
Configure Standard Cloud Connectors (up to 2)				X	X
Configure up to one (1) Premium Cloud Connector					X
Configure one (1) AS2 partner				X	

Simple Workflow: MFT Project within GoAnywhere contains up to five (5) simple tasks (file system, file transfer, email & SMS, compression, and PGP) only.

Advanced Workflow: MFT Project within GoAnywhere contains up to ten (10) simple or advanced tasks (Cloud, Database, Integration, MQ, Reports, Web Services) with control and loops.

Migrations and Upgrade Services

We recognize that minimizing operational downtime is critical to our customers. Disruptions to business continuity can cause a significant impact on your business. You also want to ensure your MFT solution complies with security requirements for new emerging security threats. You also want to maximize your investment by leveraging new capabilities and features.

GoAnywhere Upgrade Service

Our technical consultant will plan, upgrade and validate your GoAnywhere implementation with your team. The service provides you with experienced Technical Consultants that perform these services for our customers and work with our product and support team during each release. We have simplified the process to be efficient, regardless of your implementation.

We recommend the Upgrade Service for non-production or non-mission-critical production implementations. For production or mission-critical production implementations, we recommend a migration.

GoAnywhere Migration Service

Migrations can be complex. Poor planning or lack of experience can set you back in your business. Upgrading your MFT and its dependencies is a great way to keep you in security compliance. However, it could disrupt your business due to outdated clients/partners where you do not control them. Some customers choose the path of "if isn't broken, don't change it" and instead live with the risk of outdated security and possible breaches than disrupting their business. You do not have to choose between business continuity or security when you can have both. That is where a migration service is a better fit than a simple upgrade.

Migrations Services are a great way to minimize the risk of disruption by following a methodology and combining good planning and experience of skilled resources.

Below are some of the typical scenarios for Migrations Services:

- Grow, separate/split, or consolidating other business units due to company mergers or acquisitions

- Scale-out on High Availability for redundancy and performance.

- Moving from on-premises to the cloud or SaaS

- Moving from data centers or cloud providers

- Running a mission-critical implementation

- When your GoAnywhere falls behind several versions

Our migration services combined with our QuickStart and Cutovers Assistance services are the best services we can offer you to help you succeed in your business needs.

GoAnywhere Cut-over Assistance Service

Cut-overs or go-live events are crucial to your business. You need dedicated resources to help plan during a cut-over event to ensure a smooth transition of traffic from legacy to new environment.

We assist customers during a critical go-live or cut-over event. Our team coordinates with stakeholders to build an action plan for the cut-over with a rollback plan. A dedicated technical consultant will assist you for up to four (4) hours during the cut-over or go-live event to route traffic and monitor your system to ensure operations are working as expected.

GoAnywhere Health Check

We understand that the security and reliability of GoAnywhere is important to you, which is why we designed a detailed Health Check service. We will analyze your product configuration and make recommendations that can help ensure you are running at optimum levels. The following key aspects of your product are reviewed:

- Number of Licenses
- Product Versions
- Java Versions
- Databases
- Service Accounts
- Workspaces
- Job Logs
- Key Stores
- Security, Roles, & Permissions

We will review your GoAnywhere Health Check with you, guiding you through each critical component. At the end of the Health Check we will provide you with a report on your system, and any recommendations we provided during the session.

GoAnywhere MFT Training

GoAnywhere is a powerful product that helps customers with their file transfer requirements. We want to make sure you and your team can take advantage of its robust feature set.

We have designed these courses for organizations to fully utilize GoAnywhere's powerful MFT features, maximizing return on investment while preventing costly misconfigurations or poor implementations.

GoAnywhere MFT Training is a paid service. Please note that purchased training services expire 12 months from the purchase date. Training is nonrefundable and non-transferable.

Email goanywhere.training@helpsystems.com or call 1-800-949-4696 for more information or to schedule training for your team.

We offer private, instructor-led training for your team. We recommend up to 5 people

Recordings for the Instructor-led Training are not allowed. We might record sessions for internal quality purposes only. Customer agrees that any unauthorized recording, reproduction, distribution, use of any content is strictly prohibited unless Fortra explicitly authorize it. We request not to disclose sensitive information about customer data during the training. Fortra is not responsible for any information shared during the training session by the customer. If data was unintentionally disclosed during the training, the customer is responsible for requesting to destroy any recordings to Fortra within 24 hours.

GoAnywhere MFT Certifications

We organized our certification path into three levels: Fundamentals, Associate, and Expert. Additionally, we also provide specialized certifications.

All GoAnywhere MFT Certification packages are listed below. Each certification package includes the modules listed and an exam. Training modules must be completed before taking the exam and receiving certification.

GoAnywhere MFT Fundamentals
"Module 101: Getting Started with GoAnywhere MFT" on page 33
"Module 102: GoAnywhere Administration" on page 34
"Module 103: Introduction to Workflow Automation" on page 35

GoAnywhere MFT Automation Associate
"Module 104: Executing Projects and Job Management" on page 46
"Module 105: Intermediate Workflow Automation" on page 47
"Module 106: Advanced Workflow Automation" on page 49
"Module 114: Processing XML Files" on page 50
"Module 117: Secure Forms" on page 51
"Module 119: Web Services" on page 52

GoAnywhere MFT Administrator Associate
"Module 107: Securing Data Transmissions" on page 37
"Module 108: Configuring Service Listeners" on page 37
"Module 109: File Transfer Security Controls" on page 39
"Module 110: Web User Management" on page 40
"Module 111: Secure Mail" on page 41
"Module 112: GoDrive" on page 42

GoAnywhere MFT Expert
All Fundamental modules
All Administration Associate modules
All Automation Associate modules

Exams

To earn a certificate, you must pass the certification exam. Each exam voucher will allow a person up to three attempts to obtain a passing grade. Be aware that once you start an exam, you will not pause or stop it. Make sure you allocate enough time to complete the exam. Closing the browser or leaving the exam open will expire the time and submitting the attempt as-is for grading. Once you pass the exam, you will be able to download your certificate.

We require customers to agree to an honor statement and make them aware of the academic integrity policy for online exams. We recommend taking the exam no more than one month after you have completed the training course.

We offer four certification exams:

- **GoAnywhere Fundamentals Exam:** 25 questions within one hour.
- **GoAnywhere Administrator Associate Exam:** 60 questions with a three-hour time limit.

- **GoAnywhere Automation Associate Exam:** 40 questions with a one-hour time limit.

GoAnywhere Training Courses

We designed our training courses with a specific number of sessions that last up to 4 hours or half-days. Each session will allocate time for introductions, a short presentation to cover core concepts, a demonstration, and Q&A. You must schedule each session within one month apart to ensure continuity and get the best learning experience.

Our instructors will provide a demo environment for training purposes. We do not require the customer to have an environment to do the training.

GoAnywhere MFT Fundamentals Course

In this series of moduels, you will learn the GoAnywhere MFT fundamentals concepts and features.

Course Outline

Session 1
"Module 101: Getting Started with GoAnywhere MFT" on the facing page
"Module 102: GoAnywhere Administration" on page 34
"Module 103: Introduction to Workflow Automation" on page 35

Prerequisites

- Basic understanding of Databases and Operating Systems

Modules

Module 101: Getting Started with GoAnywhere MFT

This module will provide you with a guided tour of the GoAnywhere MFT interface and the basic settings to manage the GoAnywhere MFT service, including discussion around important information such as Dashboards, License settings, System Settings, and Alerts.

Length: Approximately 60 minutes

Lessons

- Users & Permissions
- Admin Interface
- Help Resources
- Installation Details
- Update Process
- File Manager
- Global Settings
- System Alerts
- Q&A

Module 102: GoAnywhere Administration

This module provides an introduction to GoAnywhere's administrative features and best practices. Topics covered in this course include server settings, databases, admin user roles, permissions, domains, login methods, and utilizing a unique Master Encryption Key for enhancing environment security.

Course Length: Approximately 60 minutes

Lessons

- Master Encryption Key

- Admin Server Configuration

- Database Configuration

- Domains

- Admin User Management

- Admin Roles

- Admin Security Settings

- Login Methods

- Q&A

Module 103: Introduction to Workflow Automation

Learn how to set up file transfers and workflows as GoAnywhere Projects, which can be automated and managed from a central interface. This course teaches you the basic building blocks of a Project, including Resources, Modules, Tasks, Elements, and Variables. At the end of the class, users will be able to create, execute, and view the results of a Project.

Length: Approximately 60 minutes

Lessons

- Core Concepts

- Resources

- Creating and Editing a Project

- Project Designer Window

- Project Components

- Best Practices

- Logging

- Error handling

- Job Control

- Q&A

GoAnywhere MFT Administrator Associate Course

In this series of modules, you will learn the GoAnywhere MFT Administrator concepts and features to enable you to install, administer and maintain GoAnwhere MFT.

Course Outline

Prerequisites

- GoAnywhere MFT Fundamentals Certification
- Basic understanding of file transfer protocols (FTP, SFTP, and HTTP), ports, SSL

certificates (PKI) concepts,

- Familiar firewall rules and networking.

Modules

Module 107: Securing Data Transmissions

GoAnywhere MFT allows you to securely exchange sensitive data with your trading partners using standard protocols. This course reinforces the application and purpose of Certificates and Keys in securing resources, transmissions, and data. Participants will learn about vaults and options for storing and creating OpenPGP keys, SSH keys, and SSL certificates. This course will also cover how to secure SFTP transmissions and resources using these critical security components. Securing the GoAnywhere Administration interface over HTTPS will be discussed. Participants will learn practical applications to authenticate Web Users with SSH Keys for added security. An overview of the methods used to encrypt files will also be covered.

Length: Approximately 60 minutes

Lessons

- Purposes and Uses of Certificates and Keys

- Keys and Certificate Storage Options

- Key and Certificate Management

- SSH Keys on SFTP Resources, Service Listeners, and Web Users

- Encryption & Decryption Processes

- Q&A

Module 108: Configuring Service Listeners

Learn how to configure and monitor the HTTPS, FTP, FTPS, and SFTP services

in GoAnywhere. This will include setting the port numbers for the listeners, setting preferences, and configuring server keys and certificates. This course will dive into the basics of additional configurations to enhance the HTTPS interface, including branding, self-registration, and SAML. Best practices for routing connections through the GoAnywhere Gateway reverse proxy will also be covered.

Length: Approximately 60 minutes

Lessons

- SFTP Configuration

- HTTPS Configuration

- Web Client Brands, Self-Registration, SAML

- FTP/FTPS Configuration

- Other available hosting services

- GoAnywhere Gateway reverse proxy mapping

- Active Sessions

- Q&A

Module 109: File Transfer Security Controls

This course provides an overview of the file transfer security controls available to you in GoAnywhere. The important security configurations involving IP filtering as well as Blacklist options for monitoring Denial of Service and Brute force attacks and Malicious User Names are covered. The discussion will cover the FIPS 140-2 Compliance standard, common industries in which it is used, and when it should be utilized. Learn how to secure your data with encryption and decryption using OpenPGP Keys, AES Standards, and Algorithms. The popular feature Encrypted Folders will be demonstrated for those needing to secure data at rest in their environment.

Length: Approximately 60 minutes

Lessons

- IP Filter & IP Blacklist
- Enabling FIPS 140-2
- SSL Certificates
- SSH Keys
- Web User Authentication using SSH Keys
- Q&A

Module 110: Web User Management

This course teaches the principles for managing the accounts (Web Users) and security settings for individuals that need to access your HTTPS, FTP, FTPS, SFTP, or AS2 file transfer servers for exchanging files. You will learn how to create Web Users and apply group or template-based permissions for easier Web User management. Topics will include password policies, user groups, and authentication methods, including Active Directory and LDAP pass-thru authentication.

Length: Approximately 60 minutes

Lessons

- Role of a Web User

- Web User Management

- Web User Details

- Web User Groups

- Web User Templates

- Web User Settings

- Login Methods and Routing

- Q&A

Module 111: Secure Mail

The Secure Mail module in GoAnywhere allows your employees to send messages and files as secure packages on an ad-hoc basis. This course will teach you how to implement the Secure Mail module through the HTTPS Web Client or Outlook Plug-in. Additionally, you will learn how to personalize your Secure Mail messages using your corporate branding and styles.

Length: Approximately 60 minutes

Lessons

- Overview

- Secure Mail Prerequisites

- Secure Mail Settings

- Package Manager

- Outlook Plugin

- Personalization with Email Templates

- Q&A

Module 112: GoDrive

The GoDrive module in GoAnywhere is an enterprise file and synchronization service (EFSS). This course will teach you how to implement the GoDrive module through the HTTPS Web Client or GoDrive Desktop Client for Windows or Mac OS X.

Length: Approximately 60 minutes

Lessons

- Overview
- GoDrive Settings
- Device Manager
- Sharing & Permissions
- Comments and Locking
- GoDrive Desktop Client
- Q&A

Module 113: Implementing and Maintaining High Availability

In this course, you will learn how to implement clustering, in which two or more GoAnywhere systems will be in an active-active configuration. This will allow you to distribute workloads and provide high availability effectively. You will learn to properly enable clustering through named systems, channel configuration, shared database, and shared file systems. (Windows, Linux)

Length: Approximately 60 minutes

Lessons

- Prerequisites

- Server Configuration

- Shared Folder Locations

- GoAnywhere.xml

- Cluster Manager

- Troubleshooting

- Log Switching

- Failover

- Backups

- Q&A

Module 116: GoAnywhere Gateway as a DMZ Reverse Proxy

Users will learn how GoAnywhere Gateway can be set up as an enhanced reverse proxy to keep inbound ports closed into the private network while keeping sensitive data out of the DMZ. We will demonstrate how to properly configure the GoAnywhere Gateway to listen for inbound connections from your external trading partners and map those sessions to SFTP, FTPS, FTP, and HTTPS services in your private network. We will discuss Agent routing through the Gateway server and forward Proxy.

Length: Approximately 60 minutes

Lessons

- Installation

- License

- Administering Gateway

- Firewall Configuration

- Gateway Configuration

- Session Persistence & Timeout

- Q&A

Module 118: Agents

Agents are lightweight applications, extensions of GoAnywhere MFT that can be deployed to virtually any operating system, including Windows, Linux, IBM i, and more. Agents can run on systems inside an organization's network or can be deployed to remote sites like branch offices and cloud networks. This course will teach you how to configure Agents, Agent Groups, and Agent Templates and manage and utilize Agents for monitoring, secure file transferring, and other project tasks.

Length: Approximately 60 minutes

Lessons

- Overview

- The Agent Manager

- Agent Groups

- Agent Templates

- The Agent Console

- Executing a Project on an Agent

- Q&A

GoAnywhere MFT Automation Associate Course

In this series of modules, you will learn GoAnywhere MFT Automation concepts and features to enable you to automate processes related to file transfers, integrate with other systems and processing files, and many other operations within GoAnwhere MFT.

Course Outline

Session 1
"Module 104: Executing Projects and Job Management" below
"Module 105: Intermediate Workflow Automation" on the facing page
"Module 106: Advanced Workflow Automation" on page 49
Session 2
"Module 114: Processing XML Files" on page 50
"Module 117: Secure Forms" on page 51
"Module 119: Web Services" on page 52

Prerequisites

- GoAnywhere MFT Fundamentals Certification
- Basic understanding of scripting or workflows
- Basic knowledge of REST API or Web Services

Modules

Module 104: Executing Projects and Job Management

You will learn how to execute Projects (as Jobs) on a scheduled basis from your

applications, on-demand, or system events. File Monitors will demonstrate how to execute Projects when files are created, modified, or deleted. Triggers let you execute Jobs based on events that occur on the system, such as when a file is uploaded or downloaded. In addition, you will learn how to create Job Queues to prioritize Jobs and limit the number of jobs that can run at a time. You will learn about Service Level Agreements, which will help you review agreed-upon file delivery expectations. At the end of the class, you will have learned several methods to manage job volumes of any size.

Length: Approximately 60 minutes

Lessons

- Core Concepts

- Schedule

- Monitors

- Triggers

- Job Queue Manager

- Queued Jobs / Active Jobs

- Completed Jobs

- Service Level Agreements

- Q&A

Module 105: Intermediate Workflow Automation

This course will teach you how to configure the connection properties for your data resources once and then use them throughout your Projects. You will learn how to utilize different variable types, use decision-making logic, iterate over data sets, and direct the outcome of your workflows.

Length: Approximately 60 minutes

Lessons

- Resources in depth

- Variables in depth

- Creating and using variables

- Simple decision making

- Tasks Overview

- Custom Tasks

- Q&A

Module 106: Advanced Workflow Automation

Learn how to manipulate your data using expressions, functions, and system variables. These features allow you to change the data stored in variables in several ways, such as calculations, number formatting, text replacements, adjusting date and time values, and more. You will learn how to anticipate and manage errors that can occur in Projects and advanced methods for calling modules and projects.

Length: Approximately 60 minutes

Lessons

- Manipulating data using Expressions and System Variables

- Loops

- Manipulating data using Functions

- Making decisions based on Expressions

- Creating and Using Multiple Modules

- Creating and using an Error Module

- Calling Projects

- Q&A

Module 114: Processing XML Files

In this specialized course, users learn how to read and write XML files using the GoAnywhere Project Designer. At the course completion, users will read data from a database and write it out to XML format and parse XML documents into database tables.

Length: Approximately 60 minutes

Lessons

- Introduction
- Discuss XML Tasks
- Read XML Project
- Write XML Project with IF and For-Each
- Q&A

Module 117: Secure Forms

The Secure Forms module allows end-users to fill out customs forms with one or more input values, optionally upload files through the HTTPS Web Client in GoAnywhere, or submit Web Forms by making SOAP or REST requests from your custom-built applications. This course will teach you how to create a Secure Form with configurable input fields, custom labels, and file components. You will also learn how to create a project that processes Secure Form data, how to provide files to Clients using Secure Forms, and how to authorize Secure Forms for Web Users.

Length: Approximately 60 minutes

Lessons

- Overview

- Creating a Secure Form

- Projects and Secure Forms

- Providing files to Clients using Secure Forms

- Authorizing Secure Forms for Web Users

- Q&A

Module 119: Web Services

This course introduces GoAnywhere Resources (REST/SOAP) for connecting to Web Services. Topics covered will include using REST resources to build out the logic to work with Web Services and use XML and JSON for Post and Get messages via REST. Some experience with RESTful Web Services will help in understanding the usage of these GoAnywhere protocols.

Length: Approximately 60 minutes

Agenda

- REST Definition

- REST Operations

- How to Documentation

- Authentication

- GoAnywhere Tasks – REST and SOAP

- Postman

- XML and JSON Creation

- Receiving Data via REST GET

- Sending Data via REST POST

- Q&A

Technical Consultation

As a business, your team will need consultation throughout for different aspects. We offer a la carte T&M hours to assist you as needed.

- **Production Readiness and Go-Live Review:** A Fortra Technical Solutions Consultant will work with you to verify your GoAnywhere installation, resources, and transfers have been configured with the recommended and optimal settings before you launch the product in your production environment. A multi-point checklist will be used to create a tailor-made report with suggestions to improve the availability and scalability of the GoAnywhere installation

- **Project Development Assistance:** GoAnywhere MFT is capable of automating very complex multi-step workflows. Once you provide your data workflow requirements to Fortra, a consultant can work with you to solve these challenges and teach you how to perform these kinds of workflows in the future.

- **Project Refactoring Assistance:** Converting from another managed file transfer software application or script-based process? A Fortraconsultant can guide you through your conversion, including software installation, converting existing user accounts and encryption keys, and configuring project execution and automation.