



## **TRANSFER MANAGER 2019**

Client User Guide

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### 1 Introduction

IVANS Transfer Manager™ Client is a software package designed to facilitate communications between trading partners in the insurance industry. Transfer Manager makes it possible to securely send and receive mail to and from IVANS Exchange. Transfer Manager Client is a Microsoft .NET Framework-based application, and is therefore subject to all of the requirements imposed by it.

### 2 Requirements

Transfer Manager Client 2019 supports Microsoft .NET Framework 4.6.0. Please note that Microsoft .NET Framework 4.5 requires a manual update to support TLS 1.2. Microsoft NET Framework 4.0 and lower does not support TLS 1.2 and therefore will not support Transfer Manager 2019. If a supported .NET Framework is not installed on the machine, the Transfer Manager installer will install Microsoft .NET Framework 4.6.0. Additionally, *Microsoft Windows 7 8.1, or 10* is required. Management system partners: please review your AMS Hardware and Software guidelines to ensure that your hardware and software requirements are compatible with this delivery.

### 3 Installation Overview

The Transfer Manager installation is packaged as an InstallShield application. Once installed, Transfer Manager Client is a single-user application, with single installation per version, per workstation. It should therefore only be executed from the computer used to install the software. To run Transfer Manager Client after it is installed, navigate to *Start > All Programs*, and select *Transman.exe* or click on the icon located in the *Programs* folder.

#### 3.1 Upgrading from a prior version of Transfer Manager

Existing Transfer Manager installations are designed to be updated with no impact to the user. When upgrading Transfer Manager, be sure that you install the upgrade to the same path that the Transfer Manager is currently installed in, or you may experience problems.

#### 3.2 Transfer Manager Installation Steps

1. Double-click *setup.exe* to initiate the installation.
2. Click **Run** if presented with a dialog box concerning security. Click **Install** if presented with a dialog box requesting to install *Microsoft .NET Framework 4.6.0 Full*. This process includes the download and installation of the .NET Framework, which may take a few minutes. Once the .NET Framework has installed, the Transfer Manager installation will automatically continue.
3. Click **Next** on the *Welcome to the InstallShield Wizard* dialog box.
4. Click **Yes** to agree to the *License Agreement*.
5. Click **Next** to install at the default destination folder or **Browse** to select a different destination.
6. Click **Yes** to confirm the selected destination folder. The installation begins, and a progress bar displays to indicate the installation status.
7. Click **Finish** when prompted; the installation is complete.

### 4 Configuring Transfer Manager

After installation, the next step is to configure Transfer Manager. Configuration information can come from a variety of sources. Some items may be configured manually within the Transfer Manager interface. Other items may be configured by supplying a Transfer Manager Configuration (TMC) file or an existing Expedite profile. If you migrated your settings from a prior version of Transfer Manager, then you should not need to perform any further configuration.

#### 4.1 Transfer Manager Configuration (TMC) files

Most every type of configuration task can be accomplished through the use of a Transfer Manager Configuration (TMC) file. A vast majority of these tasks can also be performed directly within the Transfer Manager user interface. It is not necessary to fully understand how to create TMC files in order to make use of them. One of the common reasons for building a TMC file is to define, send, and receive classes, such as the standard Agency-Company Interface classes (AIDOWN and AIUP).

##### 4.1.1 Loading a TMC file

A TMC file may be loaded into Transfer Manager in one of two ways. For the first method, place the TMC file into the DATA\CONFIG folder within your Transfer Manager installation folder. When Transfer Manager is started, it will look in this folder for existing TMC files to process. After each TMC file is opened and processed, it is deleted. This method is preferred for deploying an update to many agencies.

The manual process is preferred when you are working with a specific agency, and especially in a troubleshooting process when you want to confirm importing some specific changes outside of running a download.

The second method is to use the Load Configuration File menu option. This method is preferred when you are working with a specific agency, and particularly in a troubleshooting process when you want to confirm importing some specific changes outside of running a download. Follow the steps below to load a TMC file into Transfer Manager from within the user interface.

1. Select **Load Configuration File** from the *Configuration* menu. The *Load Configuration File* window displays.
2. Browse to the folder that contains the TMC file you want to load.
3. From the rowse window, select the **TMC file** and click the **Open** button.
4. Once the TMC file is successfully loaded into Transfer Manager, the *Success Loading Config File* window displays. Click **OK**.

##### 4.1.2 Exporting the current Transfer Manager configuration as a TMC file

Transfer Manager can export its current configuration for backup purposes. The backup file is created in the Transfer Manager installation folder, and is named *BACKUP.TMC*. If the file already exists, it is overwritten. To back up your current configuration, follow the steps below.

1. Select **Export Configuration File** from the *Configuration* menu.
2. After the backup TMC file is successfully exported, the *Successful Configuration Export* window displays. Click **OK**.

### 4.2 Proxy Settings

Transfer Manager utilizes an internet connection to connect to ECS and IE. If you experience issues when trying to connect via the Internet and your site utilizes a proxy server, then you may need to enter your proxy information directly into Transfer Manager.

1. Select **Proxy Settings** from the *Configuration* menu. The *Proxy Settings* window displays.
2. To enable Transfer Manager to use a proxy server when connecting via the Internet, select the **Use a proxy server for ECS or Internet IE communication** checkbox.
3. Enter the address of your proxy server into the *Server Address* field.
4. Enter the port used by your proxy server into the *Port* field.
5. The default authentication method is to use Microsoft's Integrated Authentication (NTLM). If your site does not use this method of authentication, de-select the **Integrated Authentication (NTLM)** checkbox, and enter your *User ID*, *Password*, and *Domain* information.
6. Click **OK**.

### 4.3 Message Classes

Message classes are used to define what types of data may be sent and received by Transfer Manager.

#### 4.3.1 Send Classes

A *Send* class is used to configure Transfer Manager for sending a particular type of data. Each *Send* class has configurable parameters that are used to further specify how the data should be processed.

The base Transfer Manager installation includes one standard *Send* class named TECHSUPPORT. This class is used to send various technical support data to IVANS, should it be necessary for troubleshooting purposes.

Other *Send* classes, such as the standard class for sending Agency-Company Interface data (AIDOWN), can be obtained from IVANS (or your software ManagementSystem) in the form of a Transfer Manager Configuration (TMC) file that can be directly loaded into Transfer Manager.

Once a *Send* class has been successfully loaded into the Transfer Manager configuration, its configurable parameters may be viewed and edited.

1. Select **Send Classes** from the *Configuration* menu. The *Transfer Manager Setup* window displays.
2. Select the *Send* class you want to view/edit, and then click the **Edit** button. The *Edit Send Class* window displays. The various parameters are discussed below.

|                   |   |
|-------------------|---|
| <b>Name</b>       | A description of the class; primarily used for display purposes.  |
| <b>Batch Mode</b> | Contains two settings: <i>Always</i> and <i>Select</i> . If set to <i>Always</i> , the class is activated any time a session is run. <i>Select</i> indicates that the class may only be activated by command-line parameters in an Auto-Run mode. |
| <b>Code</b>       | The message class code. This code is used when communicating with ECS and IE to indicate the type of data, and cannot be changed by the   |

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|                          |  |
|--------------------------|--|
|                          | user.  |
| <b>Group</b>             | Indicates that the class has membership in a particular group. When one member of the group is activated, all members of the group are activated, regardless of the method used to queue the original file and regardless of the <i>Batch Mode</i> . Note that each class can belong to only one group.  |
| <b>File Path</b>         | The location where the transfer control files (.XFR) for this class must be located. These files cause Transfer Manager to queue a data file for sending.  |
| <b>Archive Days</b>      | This setting determines the number of days that data files for this class are retained in the local Transfer Manager file archive after they are successfully sent. When this time period is reached, the data files are purged from the archive at the end of the next session that is performed (unless archive cleaning is disabled – see <a href="#">Command-Line Parameters</a> ). If this is set to 0, files that are sent are not stored in the local Transfer Manager archive.   |
| <b>Send From</b>         | Indicates that a specific mailbox is the default to send files for this particular class.  |
| <b>No Archive Limit</b>  | Indicates that sent files should be kept in the local Transfer Manager file archive indefinitely. If this is set, you must manually delete files in the local archive if you no longer want to keep them.  |
| <b>Binary</b>            | When selected, files sent to IE will be sent “as-is”, without any character set conversion. If <i>Compression</i> and <i>Binary</i> are both unselected, and a file created with the ZIP or Comm-Press (bTrade) compression algorithms is detected, Transfer Manager will force the file to be sent without any conversion.  |
| <b>Default</b>           | This can be selected on only one <i>Send</i> class, and it indicates that this class should be used as the default <i>Send</i> class. Files sent using the <i>BASEIN.MSG</i> interface that specify a class code not defined within Transfer Manager are processed as if they were of this default class.<br><b>NOTE:</b> If the destination of the file is IE, the file is sent using the specified class code, but entries are recorded in the log as the default class.   |
| <b>Compression</b>       | When selected, this instructs Transfer Manager to compress the data before sending it. If the destination of the file is IE, the compression method utilized is Comm-Press (bTrade). When the destination of the file is ECS, the trading partner’s ECS mailbox is examined to determine if it is being accessed using Transfer Manager. If so, the ZIP compression method is used when sending the file. If not, the Comm-Press (bTrade) compression method is used. Files that have been created using the ZIP or Comm-Press (bTrade) compression algorithms outside of Transfer Manager will be detected, and passed through unchanged. |
| <b>CRLF Flag</b>         | Indicates that the Comm-Press (bTrade) option for Carriage-Return/Line-Feed handling should be enabled when using the Comm-Press (bTrade) method of compression. Refer to <a href="#">Comm-Press (bTrade) documentation</a> for additional information.  |
| <b>Delete After Send</b> | If selected, the data files for this class will be deleted after they are successfully sent.   |

### 4.3.2 Receive Classes

A *Receive* class is used to configure Transfer Manager for receiving a particular type of data. Each *Receive* class has configurable parameters that are used to further specify how the data should be processed.

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### 4.3.2.1.1

The base Transfer Manager installation includes two standard *Receive* classes named *SYSERROR* and *TMCONFIG*.

The *SYSERROR* (IE Error Messages) class is used to receive IE mailbox error messages. These error files are typically stored in the *SUPPORT* folder located in your Transfer Manager installation folder.

The *TMCONFIG* class is used to receive Transfer Manager Configuration (TMC) files, which contain updated configuration information. The files are stored in the *DATA\CONFIG* folder and are processed automatically at the end of the session in which they are received.

Other *Receive* classes, such as the standard class for receiving Agency-Company Interface data (AIUP), can be obtained your software Management System in the form of a Transfer Manager Configuration (TMC) file that can be directly loaded into Transfer Manager.

Once a *Receive* class has been successfully loaded into the Transfer Manager configuration, its configurable parameters may be viewed and edited.

1. Select **Receive Classes** from the *Configuration* menu. The *Transfer Manager Setup* window displays.
2. Select the *Receive* class you want to view/edit, and then click the **Edit** button. The *Edit Receive Class* window displays. The various parameters are discussed below.

|                      |  |
|----------------------|--|
| <b>Name</b>          | A description of the class; primarily used for display purposes.   |
| <b>Batch Mode</b>    | Contains two settings: <i>Always</i> and <i>Select</i> . If set to <i>Always</i> , the class is activated any time a session is run. <i>Select</i> indicates that the class may only be activated by command-line parameters in an Auto-Run mode.  |
| <b>Code</b>          | The message class code, which cannot be changed by the user.   |
| <b>Group</b>         | Indicates that the class has membership in a particular group. When one member of the group is activated, all members of the group are activated, regardless of the method used to queue the original file and regardless of the <i>Batch Mode</i> . Note that each class can belong to only one group.  |
| <b>File Path</b>     | The location where the received files should be stored. Macro specifications may be inserted in the path as well (see <i>File Name</i> below).   |
| <b>File Name</b>     | The name used for storing received data files of this class. If a name is not specified, the original name of the file is used. Macro specifications may be inserted in the name as well, and may be used alone, in combination with each other, and in combination with static text. The valid macro values are as follows: <ul style="list-style-type: none"><li>• %f Original Filename</li><li>• %s Sender Account and User ID (<i>account.userid</i>)</li><li>• %v Site from which the file was received</li><li>• %c Class code</li><li>• %a Sender's account only</li><li>• %u Sender's user ID only</li><li>• %r Receiver's account only</li><li>• %z Receiver's user ID only</li></ul> |
| <b>Save Behavior</b> | Contains three settings: <i>(I) – Iterate</i> , <i>(O) – Overwrite</i> , and <i>(A) – Append</i> . When set to <i>(A) - Append</i> , and an existing file with the same name is present, the received file is appended to the existing file. The <i>(O) - Overwrite</i> setting causes existing files with the same name to be   |

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overwritten by the received file. A setting of *(I) - Iterate* causes the received file to have its file extension replaced by a 3 digit sequence number (i.e. – “001”, “002”, etc.). Sequence numbers always start at “001”, and any existing files are not overwritten. For example, if “File.001” and “File.003” already exist in the target folder, the first received file would be named “File.002”.

### **IE Default**

This can be selected on only one *Receive* class, and it indicates that this class should be used as the default *Receive* class when receiving files from IE. Files that do not have an assigned class, or those files with classes that are not otherwise defined in Transfer Manager, are processed as if they were this default class.

## 5 Agency Management System Configuration

IVANS Transfer Manager is capable of sending information about an agency’s Agency Management System (AMS) to IVANS Exchange. This information is used to maintain a current record of an agency’s active AMS on IVANS Exchange website. This accurate AMS information can then be used to drive insurance carriers’ policy download and to offer industry-wide statistics on policy download trends.

### 5.1 Implementing Agency Management System Auto Update

The Agency Management System Auto Update is implemented when a Transfer Manager Configuration (TMC) file containing a [MANAGEMENT] section is placed into an agency’s TM Data\ Config folder, where Transfer Manager will find it and load it into its database. [MANAGEMENT] is a typical TMC section and may be included in a TMC file alongside [MAILBOX], [SENDCLASS], [RCVCLASS], and other TMC sections. It is also acceptable to provide [MANAGEMENT] information inside a stand-alone TMC file if that methodology is easier for the Management System to implement.

A [MANAGEMENT] section contains the following keys with the given maximum length:

Company: (30 characters) the name of the company that created and maintains the Agency Management System.

Product: (50 characters) the product name for this Agency Management System.

Version: (50 characters) the installed version for this Agency Management System.

CustomerData: (255 characters, optional) additional data the Transfer Manager client will present to ECS along with the other Agency Management System Auto Update information.

Transfer Manager uses a single [MANAGEMENT] section at any given time. An Agency Management System should provide only one [MANAGEMENT] section within a given TMC file; the last one in internal position within the TMC is kept when multiple sections are included.

If the agency user chooses to export their configuration to a TMC file from the Configuration | Export Configuration File... menu action, the program will not export a [MANAGEMENT] section into the backup file. This prevents the agency from exporting or taking a backup TMC file from a previous Transfer Manager installation that was utilized by a different agency management system and importing the outdated Agency Management System record into their current Transfer Manager installation utilizing a new Agency Management System.

Participation in the Agency Management System Auto Update initiative is voluntary.

ManagementSystems retain access to the Transfer Manager client or ECS, and Agency mailboxes and data transactions will operate normally irrespective of the implementation of the [MANAGEMENT] data section on a given Transfer Manager installation.

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### 5.1.1 Naming Persistence

Transfer Manager will pass the *Company*, *Product*, and *Version* keys to ECS, which maps these names to entries in a centralized repository. ECS then updates the agency mailbox, recording the version of the AMS in use. A programmer would consider the values of these keys to be tokens, which represent the basic identifiers of an agency's Agency Management System to ECS and IVANS EXCHANGE.

#### 5.1.1.1 Company and Product Keys

IVANS defines the values for the *Company* and *Product* keys. Management Systems must use only these values with the [MANAGEMENT] section keys; failure to do so results in additional work for both IVANS and Management System development. In the event of a *Company* or *Product* name change, the Management System should notify IVANS in order to coordinate the necessary changes within IVANS EXCHANGE.

#### 5.1.1.2 Version Key

A Management System is expected to change the *Version* values for their products with new releases. Any naming convention may be followed, but a unique value for each product version is encouraged.

#### 5.1.1.3 Validation

The Transfer Manager client does not pre-validate *Company*, *Product*, or *Version*; it accepts any data reported in a TMC file's [MANAGEMENT] section in the same way that it accepts any [MAILBOX]. If a Transfer Manager client transmits Management System data that includes a *Company*, *Product*, or *Version* that ECS does not recognize, ECS records the data without comment and continues with the session. ECS will never reject a Transfer Manager client connection if it cannot confirm the validity of Agency Management System Auto Update data as it considers such to be *optional metadata* and it is not necessary for the normal functioning of ECS.

#### 5.1.1.4 Product Updates

In the event that a Management System update occurs before the company registers the new version with IVANS, please contact IVANS Service Executive (SE) with this information at the earliest opportunity. ECS should pick up the version change, retroactively, on all Transfer Manager clients that have reported the new version once the Management System's registration process for the new version has completed.

### 5.1.2 CustomerData Key

The CustomerData key is intended to provide information that uniquely identifies the customer using the current mailbox. A ManagementSystem may choose which data is included here and is free to implement their own mapping schema. However, IVANS suggests that a IIVANS Exchangense key or serial number is the most useful in practIVANS Exchange.

A value set for CustomerData under [MANAGEMENT] is the default value for all mailboxes within a Transfer Manager installation. If this value is set, then every mailbox that does not contain a CustomerData value will pass the [MANAGEMENT] CustomerData value to ECS when the Transfer Manager client starts a session.

CustomerData entered under the [MAILBOX]section always take precedence over [MANAGEMENT]CustomerData . Every mailbox that contains a CustomerData value will pass the [MAILBOX]CustomerData value to ECS when the Transfer Manager client starts a session.

If one has a TMC file with a [MAILBOX] section that does not include a CustomerData key, and TMConfig already has a CustomerData entry, loading the TMC file will remove the mailbox's

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CustomerData value from the database. Therefore, no key in the TMC section is equivalent to “remove CustomerData”.

To revert a given mailbox to transmit the client default CustomerData, it may remove the mailbox’s CustomerData entry in the [MAILBOX] section. The client default CustomerData may also be cleared in the same manner.

A ManagementSystem who decides there is no need for client default level CustomerData but wishes to send mailbox level CustomerData may add CustomerData keys under the [MAILBOX]section and omit this key under the [MANAGEMENT] section. If you do not wish to provide any CustomerData to ECS, you may ignore using this key altogether.

#### 5.1.3 Example TMC file

```
[MANAGEMENT]
Company=The ManagementSystem
Product=The Program
Version=9.9 servIVANS Exchange pack 9 build 9909
CustomerData=12345-ABCDE
```

```
[MAILBOX]
Account=yagency
UserID=yagent
SiteCode=IVANS3
Password=~~~~~
Online=True
CustomerData=A1,B2,C3
```

In the above example, all transactions of mailbox *yagency.yagent* will pass the CustomerData value of “A1,B2,C3” to ECS. If the installation has additional mailboxes, these mailboxes will pass the client default CustomerData value of “12345-ABCDE” to ECS.

#### 5.1.4 Agency Management System Auto Update FAQ

**Q. How should I integrate the Agency Management System Reporting (AMSR) information into my agency management system application’s process?**

A. Most Agency Management Systems generate a TMC file for the agency’s [MAILBOX] at some point and drop it into the Data\Config folder where the TM client will load the data on the next run. We suggest performing a similar action with the [MANAGEMENT] section: generating a TMC file and dropping it into Data\Config whenever you do so for [MAILBOX]. Feel free to create individual files or combine the two sections into one file.

Once the Agency Management System Auto Update data is entered, it does not need to be refreshed since it is stored in the TMConfig database. Therefore, your Agency Management System could be designed to create a [MANAGEMENT] TMC file only when your agency installs a new version of the software. Note that there is a potential loophole if the agency restores its TMConfig from a backup TMC or MDB copy after installing the new version of the Agency Management System. For this reason, if your AMS already creates a new [MAILBOX] TMC on every run, it may be preferable to program it to always generate a [MANAGEMENT] section and include it in that TMC—see section 5.2.1.

## 6 Using Transfer Manager

### 6.1 Communication sessions

There are two methods to establish a session using Transfer Manager. The first method is via the Transfer Manager user interface. The second method is to execute Transfer Manager in an automated or unattended mode (via command-line parameters).

#### 6.1.1 Starting a session using the user interface

Follow the steps below to start a new session from within the Transfer Manager user interface.

1. Select **New** from the *Session* menu. The *New Session* window displays.
2. Click the **Run Session** button to start a new communications session.
  - a. **Note:** If you click the *OK* button, the *New Session* window closes without running a session.
3. As the session is being performed, the *Session Status* displays the status of the session. To cancel a session that is in progress, click the *Cancel* button on the *Session Status* window.
4. When the session is complete, the *New Session* window displays again. The status of the various actions performed during the session are viewable in the **Session Log** area. You can also click on the *Sends*, *Receives*, and *Acknowledgments* tabs to see the individual items that were processed.
5. Click **OK** to close the *New Session* window.

#### 6.1.2 Starting a session using command-line parameters

Transfer Manager supports various command-line parameters that can be used to establish a session without using the user interface. This unattended mode of operation is useful when Transfer Manager needs to be incorporated into a batch process, such as in an overnight download scenario.

The following list of command-line parameters can be specified when executing Transfer Manager.

- /A** Auto-Run This parameter causes Transfer Manager to establish a communication session when started. After the session is completed, Transfer Manager will close. Several of the other parameters imply the usage of Auto-Run mode, so if one of those options are specified, it is not necessary to specify **/A**.
- /B** Batch Override This parameter is mostly for backward compatibility, and should be avoided. Using this parameter disables the automatic activation of classes with a *Batch Mode* of *Always*, and has no effect when Auto-Run is not used.
- /C** Archive Cleaning (implies Auto-Run) This parameter is mostly for backward compatibility, and should be avoided. Using this parameter causes Transfer Manager to perform archive cleaning at the end of the session, which is the default behavior.
- /C-** Disable Archive Cleaning (implies Auto-Run) This parameter disables the automatic archive cleaning that is performed at the end of a session.
- /C\*** Clean Archive ONLY This parameter causes Transfer Manager to clean the send archive, and then close. No session is established.
- /E** Expedite Support (implies Auto-Run) May be specified as **/E** or **/E:filename**; it establishes a session driven by an Expedite-style script. If no filename is given, the default filename

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of *BASEIN.MSG* is used. The script file must be located in the SUPPORT folder located in the Transfer Manager installation folder. The files to be sent that are specified in the script are pre-processed and the corresponding *Send* classes are activated for the session. Any defined *Receive* classes are also activated. The specified folder for each activated send class is examined for .XFR files, and the corresponding data files are queued for sending.

**Note:** The *BASEIN.MSG* file (or the filename specified) must be present in the SUPPORT folder for this parameter to work.

- /G** Group Selection (implies Auto-Run) **/G:Group1;Group2; ...** This parameter activates all of the specified groups. All *Send* and *Receive* classes that are part of the group(s) are activated. Unknown groups are ignored.
- /I** IE Acknowledgments (implies Auto-Run) This parameter causes Transfer Manager to send the necessary commands to generate acknowledgments for any files sent to IE during the session. When the acknowledgments are received during a subsequent session, they are stored in the SUPPORT folder (see [Receive Classes](#)).
- /K** Disable ECS Acknowledgment Processing (implies Auto-Run) This parameter causes Transfer Manager to skip the processing of all ECS acknowledgments during the session.
- /M** Message Class Selection (implies Auto-Run) **/M:Class1;Class2; ...** This parameter activates all of the specified *Send/Receive* classes. If any of the class names are present as both a *Send* and a *Receive* class, they are both activated. If any activated class is a member of a group, the other members of the group are also activated.
- /R** Receive Only (implies Auto-Run) **/R:Class1;Class2; ...** This parameter activates all of the specified *Receive* classes. If any activated class is a member of a group, the other members of the group are also activated, including any *Send* classes that are members of the group.
- /S** Send Only (implies Auto-Run) **/S:Class1;Class2; ...** This parameter activates all of the specified *Send* classes. If any activated class is a member of a group, the other members of the group are also activated, including any *Receive* classes that are members of the group.
- /UI-** Disable Session Status Window (implies Auto-Run) This parameter causes Transfer Manager to run a session without displaying the *Session Status* window.
- /X** Mailbox Selection (implies Auto-Run) **/X:acct.userid1;acct.userid2; ...** This parameter causes only the specified mailboxes to be online during the Auto-Run session. Any specified mailboxes that are not configured within Transfer Manager are ignored. This does not permanently alter the *Online* setting of the mailbox.

## 6.2 Viewing session history

By default, Transfer Manager saves the session detail for the last 10 sessions so that they may be reviewed at a later point in time. The number of sessions that are saved is configurable by the user by completing the following steps:

1. Select **System** from the *Configuration* menu. The *System* window displays.
2. In the *Number of Saved Sessions* field, type the number of sessions you would like for Transfer Manager to save. The maximum value is 100, and the minimum value is 10.
3. Click the **OK** button.

To view the detail information about a prior session that has been saved, use the following steps:

1. Select **Completed** from the *Session* menu. The *Completed Sessions* window displays.

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This window lists all of the saved sessions, with the oldest session at the top of the list, and the newest session at the bottom of the list.

2. To view the detail of a particular session, either double-click the entry in the list, or select the entry and click the **OK** button. The *Completed Session* window displays with all of the detail for that particular session. View the session log in the *Session Log* area; click any of the various tabs across the top to see more detailed information.
3. When you have finished reviewing the session, click the **OK** button to return to the *Completed Sessions* window. To view the details of another session, return to Step 2; when you are finished reviewing the session history, click the *Cancel* button.

### 6.3 Working with the Send Archive

Transfer Manager maintains a local *Send Archive* to store files that have been successfully sent, and who's associated *Send* class is configured for archiving (see *Send Classes*). To access the *Send Archive*, follow the steps below:

1. Select **Send Archives** from the *Archive* menu. The *Send Archives* window displays.
2. All of the archived files display and are sorted by the last send date, with the oldest item at the top of the list.
  - To select a different sort criteria, click on any of the column title buttons to sort the list based on that particular column.
  - To view additional details for any of the items in the list, click the item to select it, and then click the *Details* button.
  - If you want to view the contents of the original file, click the *View File* button, and the associated application will launch to enable you to view the file.
  - You may also re-queue the file to be sent again by clicking the *Re-Queue* button. Once the file is queued, you may also de-queue it by clicking the *De-Queue* button.
  - If you no longer want to keep the file in the archive, make sure the correct file is selected in the list, and then click the *Delete* button.
3. When you have finished viewing the archive information, click the **OK** button.

By default, Transfer Manager deletes all items from the local archive whose retention period has expired at the end of a session. If you would like to manually clean the local Transfer Manager file archive without performing a session, select **Clean Send Archives** from the *Archive* menu. This action immediately removes all files from the local archive whose retention period has expired.

### 6.4 ECS Trading Partners

Transfer Manager maintains ECS trading partners per mailbox. During the registration process, the list of active ECS trading partners is transferred to the Transfer Manager client for each online ECS mailbox in its configuration, including mailboxes added by the registration process itself.

Additionally, each partner also has an internal flag that indicates whether they are accessing their mailbox with the Transfer Manager client. This flag is used when compressing data to be sent, and it causes Transfer Manager to use ZIP compression for any files being sent to partners who are also using Transfer Manager.

If needed, you can manually disable an ECS trading partner in the Transfer Manager client using the user interface. This does not change the partner's status in the ECS server, but it affects the operation of the client.

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To view ECS trading partners, follow the steps below:

1. Select **ECS Trading Partners** from the *Configuration* menu. The *Transfer Manager Setup* window displays.
2. In the list of available ECS mailboxes (on the left), select a mailbox by clicking on its entry in the list.
3. All of the ECS trading partners for the mailbox display in the grid list to the right of the mailbox list.
4. The *Enable* and *Disable* buttons are used to enable and disable a particular partner. To disable an ECS partner, select their entry in the list of trading partners, and then click the *Disable* button. To enable a previously disabled partner, select their entry in the list, and click the *Enable* button. These changes do not take effect until you click the *OK* button.
5. To select different sort criteria for the list of partners, click on any of the column title buttons to sort the list based on that particular column.
6. To view the ECS trading partners for one of the other configured ECS mailboxes, return to **Step 2** to select a different mailbox.
7. When you are finished, click the **OK** button to accept any changes you have made. If you do not wish to save your changes, click the *Cancel* button.

## 7 Appendix

### 7.1 Copyright Notice

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