Creating Group-Based Event Rules

THE INFORMATION IN THIS ARTICLE APPLIES TO:

- EFT v6 and later

DISCUSSION

Globalscape Support links that will help you get the most out of group-based Event Rules

This article will help EFT administrators get the most out of using Permissions Groups to trigger Event Rules. Use variables to deliver files to dynamic locations and populate message bodies creating success/failure notifications with user and transfer specific information.

In many EFT installations, Sites are configured with a large number of Event Rules. In some cases, we find an Event Rule for every user account that is interacting with the server. Group-based rules provide accuracy and confidence when provisioning users or changing existing processes. Using groups, EFT administrators can build fewer rules, get more consistent results, and provide better notifications.

Primary Requirement:

Provide upload or inbound file transfer access for many external users/accounts. Deliver inbound files to an internal network share.

Secondary Requirements:

- Deliver files into a user-specific folder within the primary network share
- Create an archive copy of each file adding a date/time stamp to the archived file name
- The archive must also maintain a user-specific folder location
- Notify only users associated with file transfers of successful events
- Notify support and business teams only on failures

Challenges:

- Make onboarding of new trading partners easy
- Minimize mistakes when building new processes or provisioning new accounts

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- Limit the total number of Event Rules
- Provide uniqueness in reacting to each upload
- Accurately deliver files to dynamically created user specific locations
- Provide notifications only to users associated with events without static TO: fields.

Example:

The example provided below will deliver files to these UNC paths:

- Archive Location - \\Mynetwork\Process\Share\Archive\UserLoginName\
- Archive Filename – Date&Timestamp-SourceFileName
- Production Location - \\Mynetwork\Process\Share\Prod\UserLoginName\
- Production Filename – SourceFileName

Globalscape Suggested Solution Overview:

Permissions Group:

Create Permissions Group within the EFT administration interface. You should name or label the group in a descriptive manner.

Event Rule:

We can now build the Event Rule that will trigger the file movement.

Event Rule Type:

The Event Rule type will be On File Upload.

Event Rule Condition:

Create at least one condition to trigger the upload event.

For this example use:

- **If User Groups**—the user account is or is not a member of one or more Groups.
  1. Add the Condition to the Event Rule.
  2. In the Rule Builder, click the linked text to specify whether the user group is/is not

a member of specific group(s).

3. Click specific group(s) to open the **Event Target Users and Groups** dialog box.
4. Select the check box of the users/groups that will trigger the Event and clear the **All Users** check box if you don't want the Condition to apply to all users.
5. Click **OK** to add the Condition to the Event trigger.

Event Rule Action:

Add the Copy-Move Action to your Event Rule. We will repeat this step for the achieve and production location transfers.

Build Dynamic Notifications:

The concept of sending an email notification within an EFT Event Rule is very basic. We suggest that you review and use the variables available to populate notifications. By doing this you can include detailed information that is pertinent and specific to each transfer. Below is an example:

> This message was sent to you automatically by Globalscape EFT Server on the following event: %EVENT.NAME%.
>
> Server Local Time: %EVENT.TIME%
>
> Event Date Stamp: %EVENT.DATESTAMP%
>
> Event Rule Name: %EVENT.EVENTNAME%
>
> File Name: %FS.FILE_NAME%
>
> File Size: %FS.FILE_SIZE%
>
> Logon Name: %USER.LOGIN%
>
> Last Login Date: %USER.LAST_LOGIN%
>
> Remote IP: %CONNECTION.REMOTE_IP%

Protocol: %CONNECTION.PROTOCOL%

Tips:

Building the Move and Copy Paths – To avoid misspelling variables select your options from the provided table within each event rule wizard.

Permission Group Names - Consider using the direction of file flow or the process type for the group name. "Inbound Customers" or "Outbound Vendors" are examples of file direction names. Other EFT Administrator choose to use the business purpose to describe the group, such as "PeopleSoft Users," "Accounting Group," or "Internal Accounts" are all examples of process-driven group names. See the Permissions Group help link above for instructions on creating and populating a group.

Use More Conditions – This example will only trigger based on the user being a member of a Permissions Group. Adding filename mask or other conditions will allow for more Event Rule flexibility. This will allow groups and rules to be used for more than one process or purpose.

Targeted Notifications - Send notifications to just the user associated with an event. By selecting this option, EFT will pull the email address defined in the user account details and auto populate the To: field.(So make sure you define an email address for each user account.)