

## Requesting New Event Rule Automations for Clients

### THE INFORMATION IN THIS ARTICLE APPLIES TO:

- EFT Enterprise, all versions

What to ask for when an employee or dept. has a requirement to transfer files from the EFT server

### DISCUSSION

Most customers usually create tickets with specific information for file transfers, but struggle with understanding what information should be requested to transfer a file from external clients or to external clients.

Below is an example of a request form showing the sort of information that should be included in a request. Feel free to make it your own.

A Word doc with form fields is attached to this article.

### Business Process Request Form

<b>Customer Name</b>	<Client's Company>	<b>Project Name</b>	
<b>Requested By</b>		<b>Requester Email</b>	
<b>Requester Phone</b>		<b>Test Required</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Submission Date</b>	Click here to enter a date.	<b>Delivery Date</b>	Click here to enter a date.

### Business Need

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Please describe the business need.			
<b>Internal Path</b>	Please list the internal files path (UNC)		
<b>Is the file uploaded to MIS/IT?</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>Upload account</b>	MIX user account
<b>External Path</b>	Please list ftp server details if applicable		
<b>External Server Name</b>	ftp.remoteserver.com		
<b>Location Credentials</b>	Provide username and password		
<b>List Protocol</b>	SFTP	<b>Required Port</b>	
<b>PKA(for SFTP)</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>List Key Name</b>	Provide key Name
<b>Source File Mask</b>	Filesource.txt, *.txt, file*.*, file*.txt		
<b>File Rename Requirements</b>	Please list any file rename requirements needed at the destination location.		
<b>File Encryption</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>List Key Name</b>	Provide key Name

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<b>File Decryption</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>List Key Name</b>	Provide key Name
<b>Add Timestamp</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>Timestamp Format</b>	MMDDYYHHMMSS
<b>Strip Timestamp</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
<b>Destination Type</b>	Internal UNC <input type="checkbox"/> Internal FTP <input type="checkbox"/> External Server <input type="checkbox"/>		
<b>Internal Destination Path</b>	Please list UNC internal location if applicable		
<b>Internal FTP Server Name</b>			
<b>Location Credentials</b>	Provide username and password		
<b>List Protocol</b>	SFTP	<b>Required Port</b>	
<b>PKA(for SFTP)</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	<b>List Key Name</b>	Provide key Name
<b>Destination File Type</b>	ASCII <input type="checkbox"/> Binary <input type="checkbox"/>		
<b>Required Site Commands</b>	Please list all special site commands required by the destination host.		
<b>External Server Name</b>	ftp.externalserver.com		
<b>External Server Credentials</b>	Provide username and password		
<b>External Destination Path</b>	Please list UNC external location if applicable		

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Please list any additional file processing needed.

## Completion and Signoff

Note: All parties must approve this form prior to any rule going live in the production environment.

<b>Completed By</b>		<b>Verified By</b>	
<b>Completion Date</b>	Click here to enter a date.	<b>Verified Date</b>	Click here to enter a date.
<b>Approved By</b>		<b>Approval Date</b>	Click here to enter a date.

GlobalSCAPE Knowledge Base

<https://kb.globalscape.com/Knowledgebase/11282/Requesting-New-Event-Rule-Au...>