



FILECATALYST
THE EVOLUTION OF FILE TRANSFER TECHNOLOGY

FileCatalyst Server
Quickstart

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Introduction

This guide assumes that you are using an operating system which uses a GUI, such as Windows™ or versions of Linux, and other *nix-based systems using a windowed environment. The FileCatalyst Server may be run command-line only, but that option is not described in this document.

The FileCatalyst Server Quickstart will guide you through the following steps:

1. Installation
2. Running and licensing application
3. Connecting with Remote Administration Client
4. Creating and editing users
5. Overview of additional features

For the purpose of visualization, this guide invokes a real-world scenario, only one of many possible ways to use FileCatalyst Server:

An example user's HotFolder is configured to upload data to this Server at a scheduled interval, only sending files that are new or that have changed. Several other HotFolders monitor the same user account and automatically download new content.

The HotFolder is responsible for the bulk of this scenario. All we need to accomplish on the Server end is create a user account which can be uploaded to or downloaded from. Once this is done, we will move to the FileCatalyst HotFolder Quickstart.

Note: Upgrade installation instructions are not included in this Quickstart guide. Please refer to the full Server User Guide available on the FileCatalyst website for upgrade instructions.



1 Installation

In order to complete a successful installation of the server, there are five steps:

1. Verify environment
2. Install the applications (the Server itself, and the Remote Administration Client)
3. Open your firewall
4. Apply a license key
5. (Optionally) Run the application as a service.

1.1 Verify system environment

FileCatalyst Server contains a 64-bit OpenJDK JRE 8 in order to run the application. Please ensure that you are running on a 64-bit system before installation.

1.2 Open Firewall

If your system is protected by a firewall, and you are uncertain how to configure it, you should consult with your IT department. In order for FileCatalyst Server to accept connections, you will need the following ports to be available and open:

- TCP on ports 21 (control connection) and 12400 (remote admin port)
- TCP and UDP on ports 8000-8999 (data port range)
- TCP on port 12480 when the Web admin or HTTP Servlet is being used.

Note: the control connection *and* the data port range must all be open; otherwise you may establish connections and verify the presence of a server, but fail to transmit actual data.

Note for *nix users:

Non-root users of a *nix system are **not able** to open ports below 1024. To resolve this issue quickly for the purposes of demonstration, you may change the server port after installation. Run the application, go to the “Advanced” panel, and update the setting. The corresponding firewall port must be opened.

1.3 Perform Installation

Note: if you have another instance of FileCatalyst Direct Server running, you must exit before continuing with this guide. Be particularly careful to see if it has been started as a service and stop it accordingly.

1.3.1 Windows

1. Download the FileCatalyst Server installer (*install_fc_server.exe*) to your desktop
2. Launch installer. You should right-click the icon and select “Run as Administrator”. You will also need to trust the installer application.
3. Step through the wizard to choose installation directory and shortcut options
4. At end of wizard, click “Done”



5. Locate and launch the application from the Start Menu, at which time the License dialog appears.

1.3.2 Linux

1. Create directory at `/opt/utechsoft/server`
2. Download tarball (`fc_server.tar.gz`) to this directory
3. Use GUI-based archive tool to unpack the tarball, or open a terminal and enter with the following commands:

```
> cd /opt/utechsoft/server
> gunzip fc_server.tar.gz
> tar -xvf fc_server.tar
```

4. With the tarball unpacked, you will now have access to the README file. Open this file and continue following the instructions in order to complete installation
5. Assuming installation is complete and you are in the Server directory, enter the command `./fc_server.sh` to start the application in GUI mode, at which time the License dialog appears.

1.4 Enable Service

In almost all cases, FileCatalyst Server is most effective when run as a service. As a service, the application will continue with automated tasks after the machine has restarted for any reason. After completing the "Quickstart" document you are currently reading, you should consider referring to the main documentation. The chapter "Running at Startup" describes the procedure to run the application as a service for your given platform.



2 Licensing FileCatalyst Server

2.1 Apply a License Key

The first time you run FileCatalyst Server, a dialog box will prompt you to enter a new license key. Follow the instructions provided in the dialog in order to activate the product.

The screenshot shows a window titled "FileCatalyst Server - Enterprise v3.5 (07/17/2015 1156)". The window contains a dialog box with the FileCatalyst logo and the word "Server". The dialog box has the following text:

Activation Request

To request a FileCatalyst Direct license key, contact your account sales representative and provide the request string:

FF44988685ED9E5E

To activate FileCatalyst Server, enter the license key sent to you by your sales representative and click Activate

At the bottom of the dialog box, there is an "Activate" button and a text input field.

Three numbered callouts provide instructions:

- 1** Copy the Request String into an email to your account representative or to info@filecatalyst.com
- 2** The reply will contain a license key, which is entered into this field.
- 3** Press "Activate" to commit the license key to the server.

2.2 Updating a License Key

You may later wish to update your license key (eg. to apply a full license or to upgrade). If the old license is still valid, this may be done from the Server GUI:

The screenshot shows the FileCatalyst Server Administration console. The interface includes a menu bar (File, Actions, Help), a sidebar with navigation options (Users, Advanced, Security, Reports, Central Mgt, System Monitor), and a main content area with tabs for Network, Memory, UDP Resource, Miscellaneous, and Server License. The 'Server License' tab is active, displaying fields for Admin Version, Service Version, Request String, and License Key. A list of services is shown at the bottom, including API, Pre-2.7 FC client, FC Web, Alarms, Remote Admin, Remote Admin Applet, and HTTP Transfers. An 'Apply' button is located at the bottom right.

- 1 Click "Advanced"
- 2 Select "Server License" tab
- 3 Send the Request String to your FileCatalyst representative to obtain a key; copy this key into the License Key field.
- 4 Click "Apply"

Connected to server localhost: 12400 FileCatalyst Server Running ✓

3 Remote Administration

In order to remotely administer FileCatalyst Server, the option must first be enabled and the server must be licensed for the remote connection to take place. If the license is not in place only local administration will be possible. The Remote Server Administration tool is then installed on another computer (eg, your own workstation).

3.1 Enable Remote Administration

Open FileCatalyst Server on the server machine. Then:

1 Select "Administration"

2 Select a Connection Port (12400 is default); supply a username and password.

3 Check the box to enable Remote Connections

4 Click "Apply"

FileCatalyst Administration - localhost

Configuration Connections Admin

Administration Settings

Connection Port: 12400

Remote Administration

Enable Remote Connections

Force authentication

Admin Account

Username: admin

Password:

Read-Only Admin Account

Username: roadmin

Password:

Apply

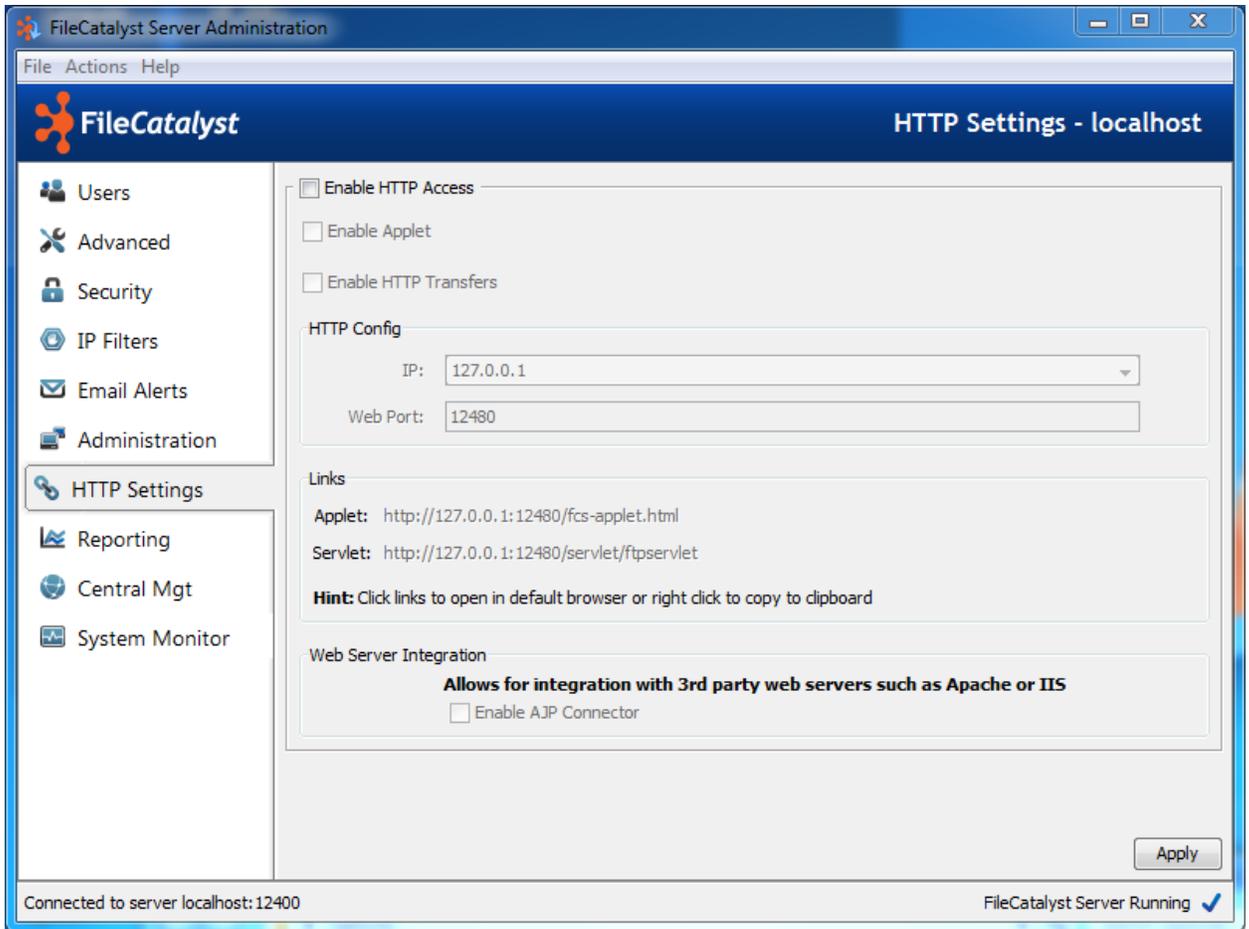
Connected to server localhost:12400

FileCatalyst Server Running ✓

3.2 HTTP Access

- HTTP Config allows for a web browser session to administer the FC Server. Enable the Applet to access the HTTP Config settings. Enter an alias, choose the IP format and a port. The address will then be, as in the example below, <http://127.0.0.1:12480/fcs-applet.html> to access the admin panel via the web.
- Enabling HTTP Transfers gives the server the ability to fall back on HTTP transfers if a client is unable to use UDP or FTP.





3.3 Install Remote Server Administration Client

To reproduce a typical real-world scenario, it is recommended that you install an instance of the Remote Administration Client on a separate computer.

3.3.1 Windows

1. Download the installer (*install_fc_server_admin.exe*)
2. Launch the installer as described earlier, and complete the wizard
3. Run FileCatalyst Server Admin from the Start menu to see the login dialog

3.3.2 Linux

1. Create directory at `/opt/utechsoft/serveradmin`
2. Download tarball (*fc_server_admin.tar.gz*) to this directory
3. Use GUI-based archive tool to unpack the tarball, or open a terminal and enter the following commands:

```
> cd /opt/utechsoft/server
```



```
> gunzip fc_server_admin.tar.gz  
> tar -xvf fc_server_admin.tar
```

4. Make the shell script executable:

```
> chmod +x fc_server_admin.sh
```

5. Assuming installation is complete and you are in the Server Admin directory, enter the command

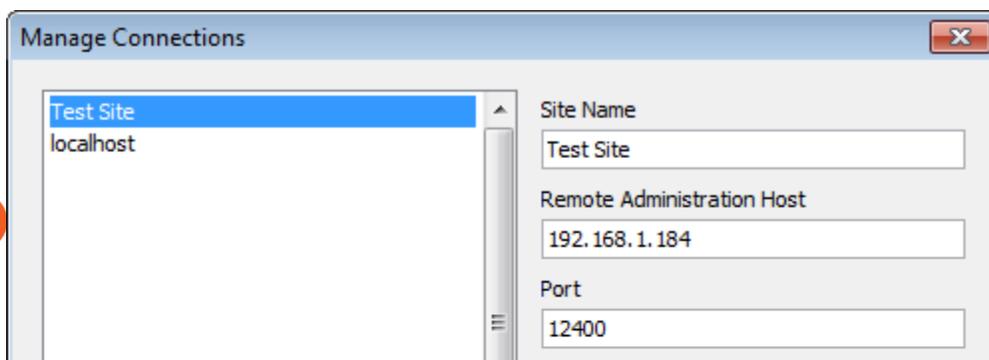
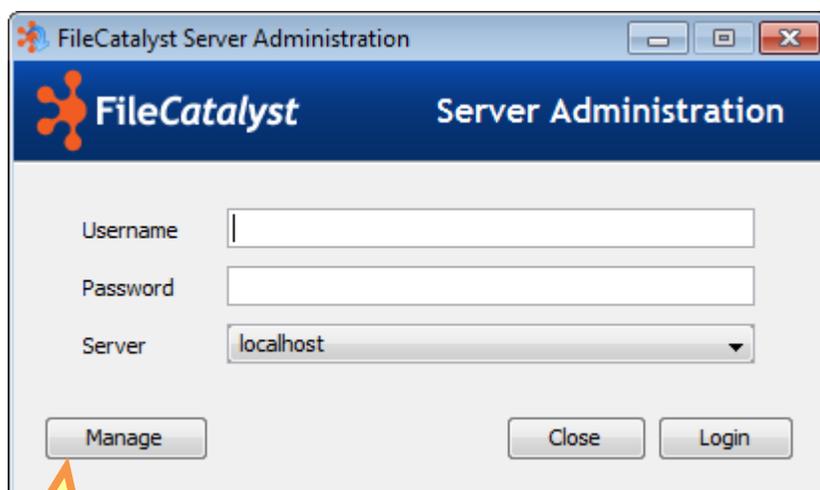
```
> ./fc_server_admin.sh
```

to start the Remote Admin GUI and see the login dialog.

3.4 Create a Remote Administration Connection

At this point, FileCatalyst Server is running on one machine, and the Remote System Administration Client is deployed to another. The next step is to connect the two.

With the Remote System Administration login dialog visible, continue as follows:



2

Press "Add New Site" button

3

1. Site Name of your own choosing.
2. IP or domain of the host Server
3. Port (12400 is default)

Press "Close"

4

5

Select Server, then enter credentials chosen when enabling Remote Administration

6

Click "Login"

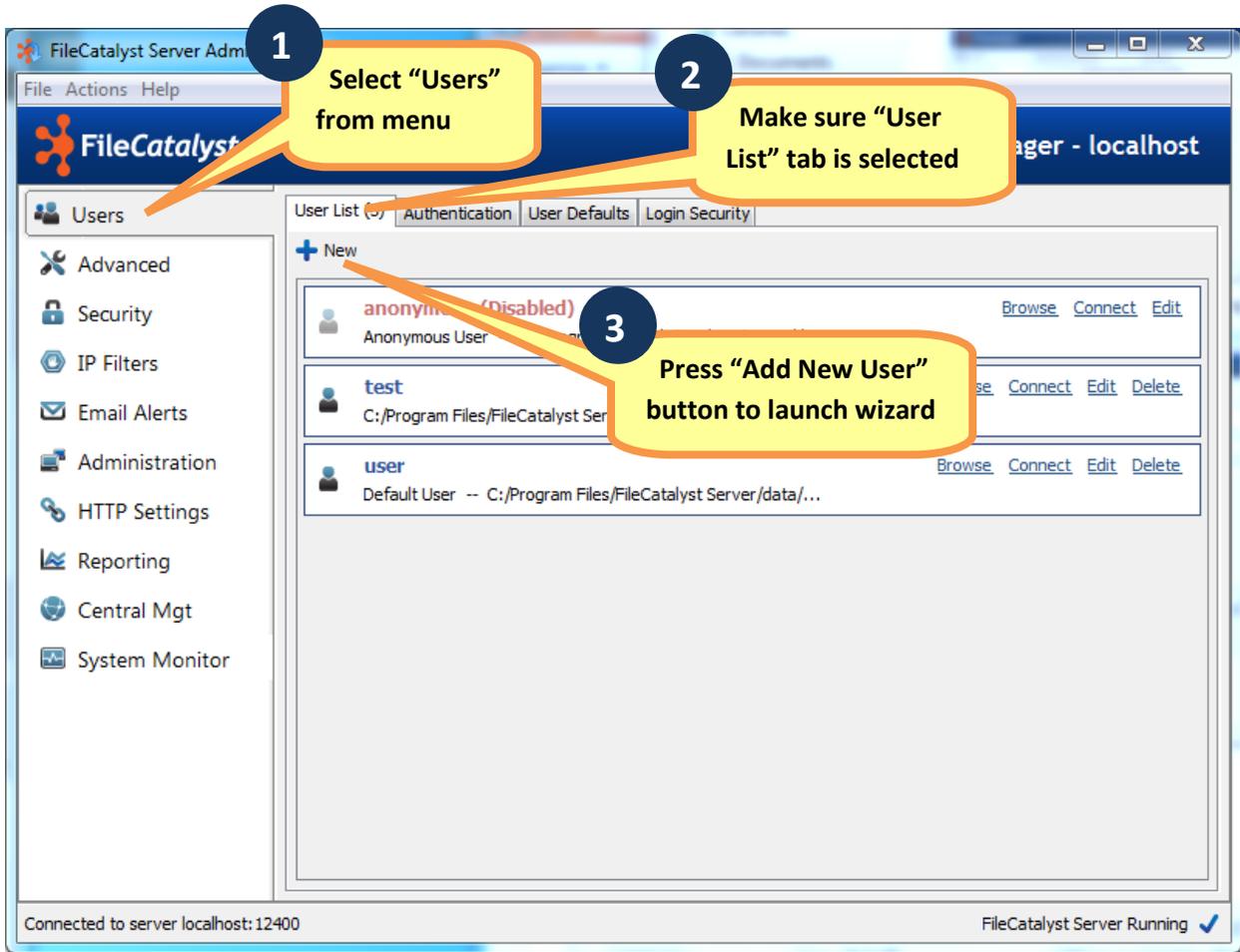
If the site's IP/domain, username, and Password are correct, the Remote System Administration Client will log in and you will see the familiar FileCatalyst Server GUI.

4 Managing Users

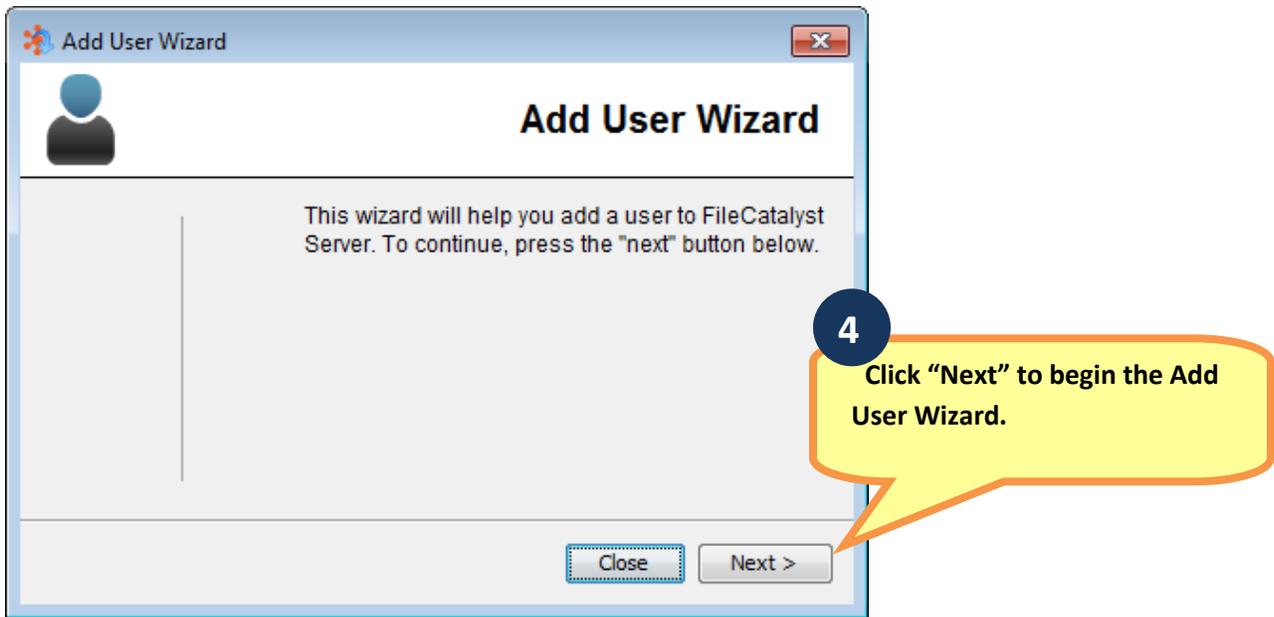
For the purposes of this guide, we will add our users manually. For advanced options such as using OpenLDAP or ActiveDirectory for authentication, please consult the full documentation (found in the Help menu).

4.1 Add a New User





The "Add User" wizard will launch in a separate Window:



The image displays three sequential screenshots of the 'Add User Wizard' application, each with a numbered callout box explaining a step.

Step 5: User Information
The 'User Information' screen shows fields for 'Full Name' (Test User) and 'E-Mail Address' (info@filecatalyst.com). A callout box states: '5 Optionally set the user's Full Name and email address.'

Step 6: Basic User Settings
The 'Basic User Settings' screen shows fields for 'Username' (testuser), 'Password' (masked with dots), and 'Confirm Password' (masked with dots). A callout box states: '6 Click "Next" to continue.'

Step 7: Basic User Settings
The 'Basic User Settings' screen shows fields for 'Username' (testuser), 'Password' (masked with dots), and 'Confirm Password' (masked with dots). A callout box states: '7 Select a username and password for a test user; confirm the password.'

Step 8: Account Information
The 'Account Information' screen shows a 'Home Directory' field (C:\Program Files\FileCatalyst Server\data\testuser) and two columns of permissions: 'File Permissions' and 'Folder Permissions'. A callout box states: '8 Click "Next" to continue.'

Step 9: Account Information
The 'Account Information' screen shows a 'Home Directory' field (C:\Program Files\FileCatalyst Server\data\testuser) and two columns of permissions: 'File Permissions' and 'Folder Permissions'. A callout box states: '9 Set a Home Directory (or use default).'

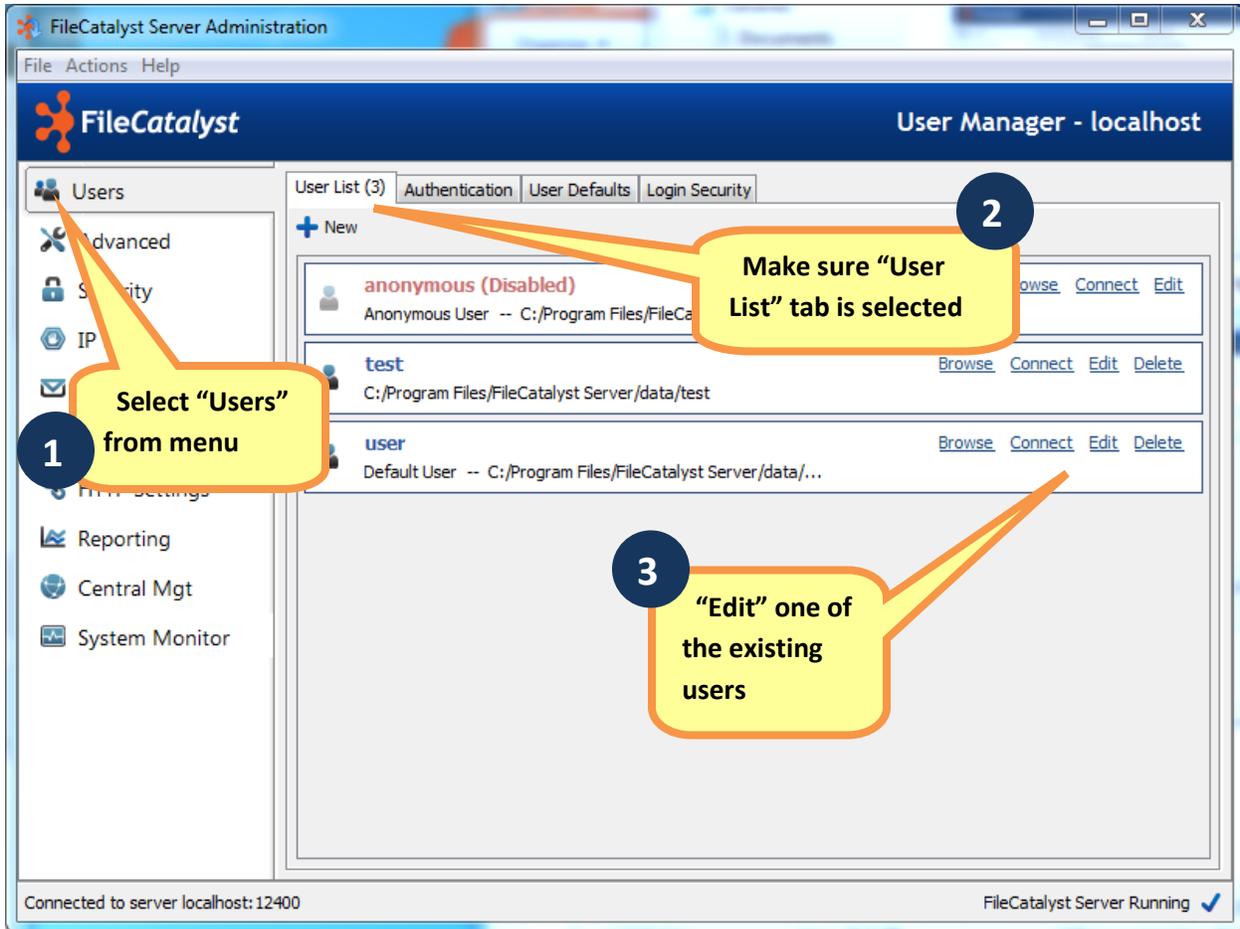
Step 10: Account Information
The 'Account Information' screen shows a 'Home Directory' field (C:\Program Files\FileCatalyst Server\data\testuser) and two columns of permissions: 'File Permissions' and 'Folder Permissions'. A callout box states: '10 Set Permissions.'

Step 11: Account Information
The 'Account Information' screen shows a 'Home Directory' field (C:\Program Files\FileCatalyst Server\data\testuser) and two columns of permissions: 'File Permissions' and 'Folder Permissions'. A callout box states: '11 Click "Finish" to exit wizard.'

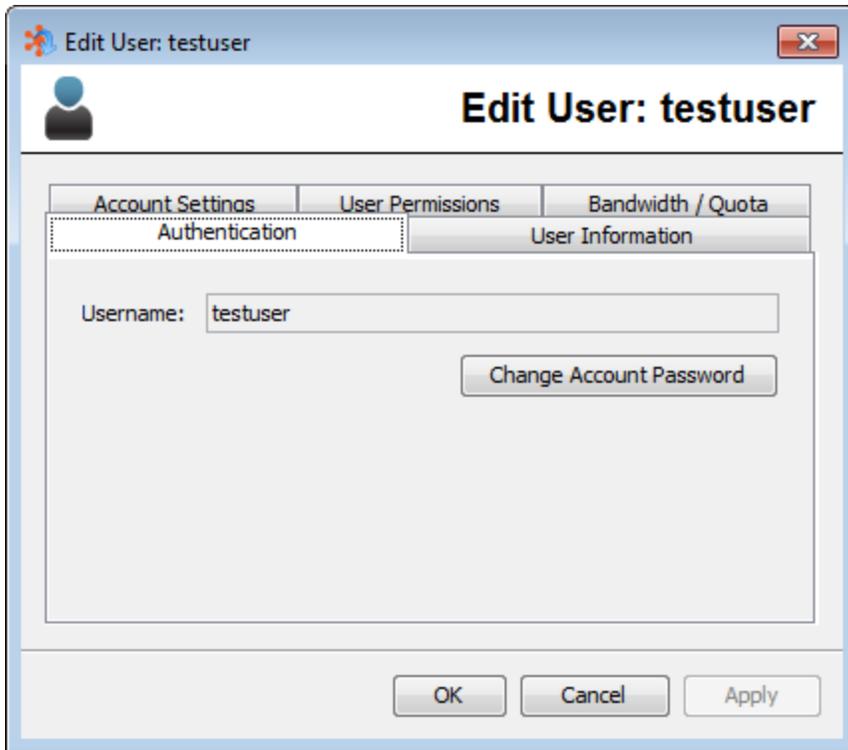
Client software may now connect with the new account's username and password.

4.2 Editing a User

Once a user has been provisioned, a number of additional changes can be made to the account, including maximum bandwidth, permissions, and passwords.



The "Edit User" options will appear in a separate window:



There are five tabs used to configure settings and information. In our example scenario, you should not need to edit any settings; however, it might be useful to become familiar with the available options by flipping through the tabs:

Authentication—used to change the user’s password

User Information—update full name and email address

Account Settings—set the user’s home directory (full path must be provided), account expiry (disabled by default), as well as a checkbox to arbitrarily enable/disable the account

User Permissions—(all enabled by default) allow the administrator to limit specific users from certain file manipulation functions

Bandwidth/Quota—the administrator may exercise some control over the user’s data transfers.

5 Additional Features

Describing each of the advanced features of FileCatalyst Server is beyond the scope of this document. However, a brief overview will point new administrators in the right direction moving forward.



5.1 Advanced Settings

FileCatalyst Server Administration

File Actions Help

FileCatalyst Advanced Settings - localhost

- Users
- Advanced**
- Security
- IP Filters
- Email Alerts
- Administration
- HTTP Settings
- Reporting
- Central Mgt
- System Monitor

Network Memory UDP Resource Miscellaneous Server License

IP/Port Settings

Server IP Address [Dropdown] Refresh

Data Port [Dropdown]

IP Settings

Enable M

Masquerade [Slider]

Bypass M

Timeout Settings

Idle Timeout: 300 seconds

Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

Use *Advanced* settings to define ports used by the server, enable masquerade for environments behind a NAT, optimize memory usage, and specify log rotation time.

5.2 Security

FileCatalyst Server Administration

File Actions Help

FileCatalyst Security - localhost

- Users
- Advanced
- Security**
- IP Filters
- Email Alerts
- Administration
- HTTP Settings
- Reporting
- Central Mgt
- System Monitor

Enable Control / Admin Connection SSL

Enable AES on Data Connection

SSL Certificate Settings

Certificate File: ...

Key File: ...

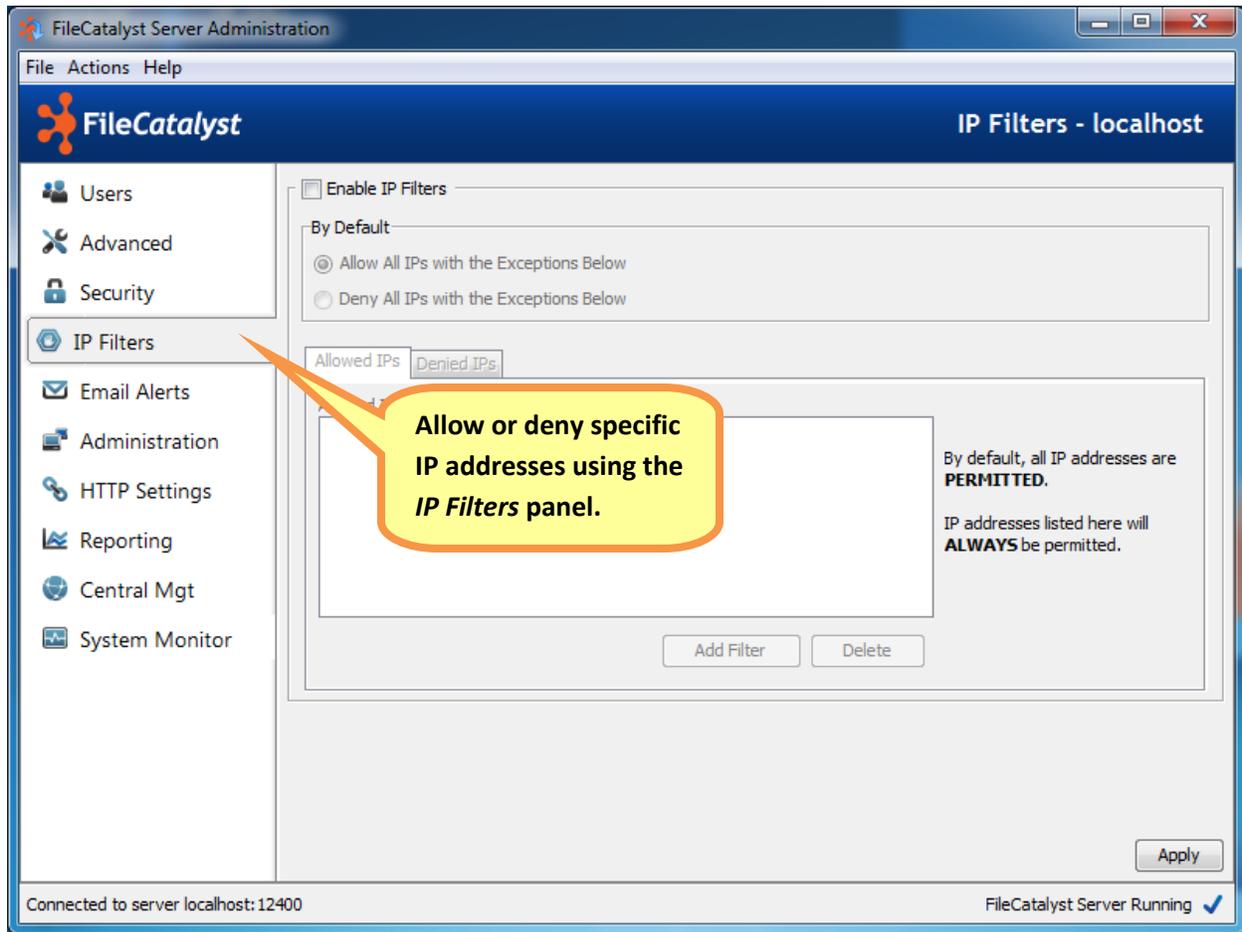
New Certificate View Certificate

Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

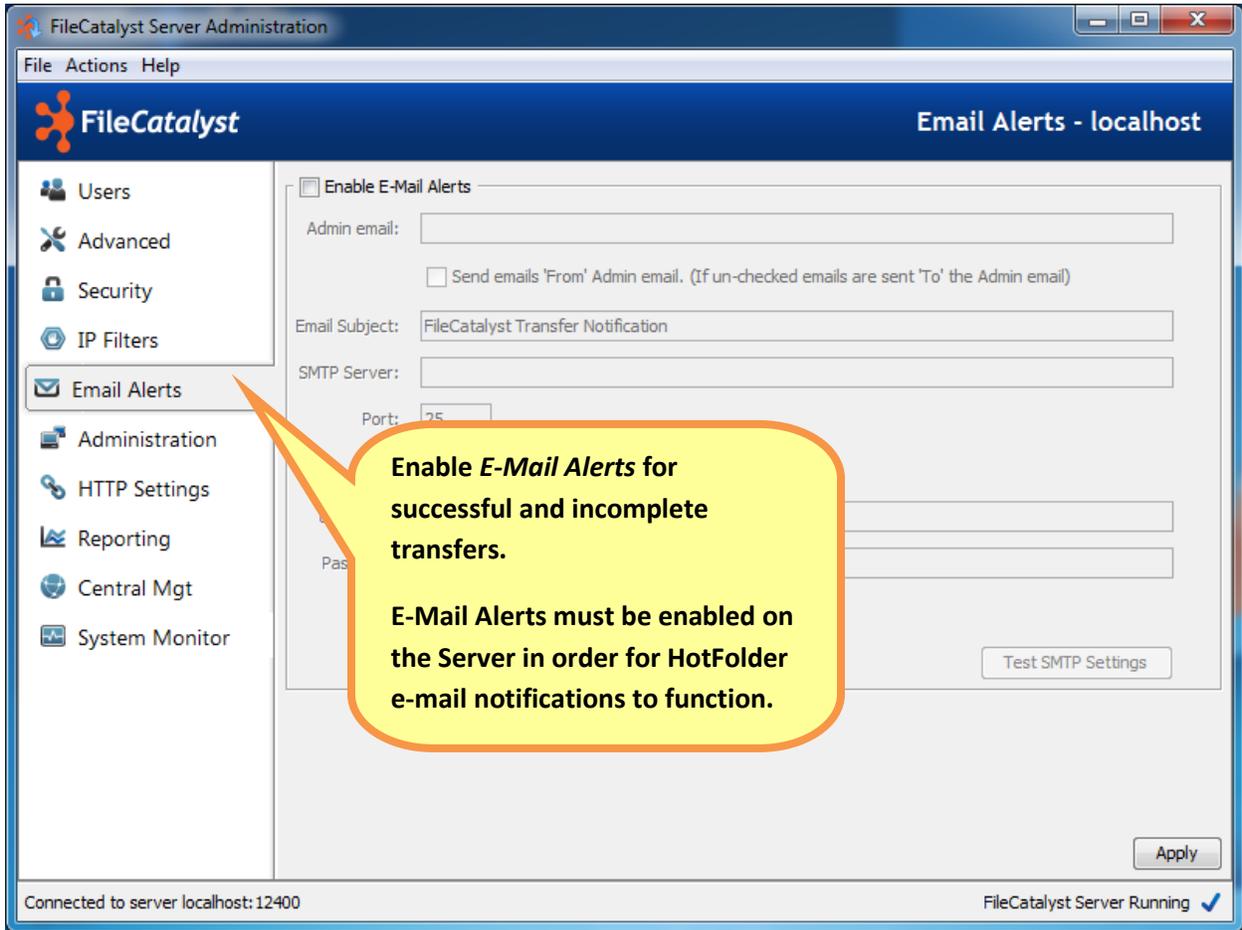
Use Security settings to enable SSL and/or AES and generate self-signed certificates for test environments.

5.1 IP Filters



The screenshot shows the FileCatalyst Server Administration interface. The title bar reads "FileCatalyst Server Administration" and the window title is "IP Filters - localhost". The main menu includes "File", "Actions", and "Help". The left sidebar contains navigation options: "Users", "Advanced", "Security", "IP Filters" (highlighted), "Email Alerts", "Administration", "HTTP Settings", "Reporting", "Central Mgt", and "System Monitor". The main content area is titled "IP Filters - localhost" and features a checkbox for "Enable IP Filters". Below this, the "By Default" section has two radio buttons: "Allow All IPs with the Exceptions Below" (selected) and "Deny All IPs with the Exceptions Below". There are two tabs, "Allowed IPs" and "Denied IPs", with "Allowed IPs" being active. A large empty text area is provided for listing IP addresses. To the right of this area, a note states: "By default, all IP addresses are **PERMITTED**. IP addresses listed here will **ALWAYS** be permitted." Below the text area are "Add Filter" and "Delete" buttons. An "Apply" button is located at the bottom right of the main content area. A yellow callout box with an orange border points to the "Allowed IPs" tab and contains the text: "Allow or deny specific IP addresses using the **IP Filters** panel." The status bar at the bottom shows "Connected to server localhost:12400" and "FileCatalyst Server Running" with a checkmark.

5.2 Email Alerts



The screenshot displays the FileCatalyst Server Administration interface for configuring email alerts. The left sidebar shows the navigation menu with 'Email Alerts' selected. The main content area is titled 'Email Alerts - localhost' and contains the following settings:

- Enable E-Mail Alerts
- Admin email:
- Send emails 'From' Admin email. (If un-checked emails are sent 'To' the Admin email)
- Email Subject:
- SMTP Server:
- Port:
- Test SMTP Settings
- Apply

A yellow callout box with an orange border points to the 'Enable E-Mail Alerts' checkbox and contains the following text:

Enable *E-Mail Alerts* for successful and incomplete transfers.

E-Mail Alerts must be enabled on the Server in order for HotFolder e-mail notifications to function.

At the bottom of the window, it shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

5.3 Reporting

The screenshot shows the FileCatalyst Server Administration interface. The title bar reads "FileCatalyst Server Administration" and the window title is "Reporting - localhost". The menu bar includes "File", "Actions", and "Help". The FileCatalyst logo is in the top left, and the text "Reporting - localhost" is in the top right. A left-hand navigation pane lists: Users, Advanced, Security, IP Filters, Email Alerts, Administration, HTTP Settings, Reporting (highlighted), Central Mgt, and System Monitor. The main content area has a checked checkbox for "Enable Reporting". Below it are two tabs: "Settings" and "Run Report". The "Settings" tab contains: "Report File Location" with a text box containing "C:\Program Files\FileCatalyst Server\reports" and a "Browse" button; "Report Data Retention Period" with a text box containing "168" and the unit "hours"; and "Report Snapshot Interval" with a text box containing "30" and the unit "seconds". A yellow callout bubble with an orange border points to the "Reporting" menu item and contains the text: "Set parameters for periodic Reporting, or generate on-demand reports." At the bottom right of the main area is an "Apply" button. The status bar at the bottom shows "Connected to server localhost:12400" on the left and "FileCatalyst Server Running" with a checkmark on the right.

5.4 Central

FileCatalyst Server Administration

File Actions Help

FileCatalyst Central Configuration - localhost

Enable remote monitoring of service (This will enable and lock Reporting if required)

Central: Address Port

User

Password

FC Server: IP

Hostname

Alias

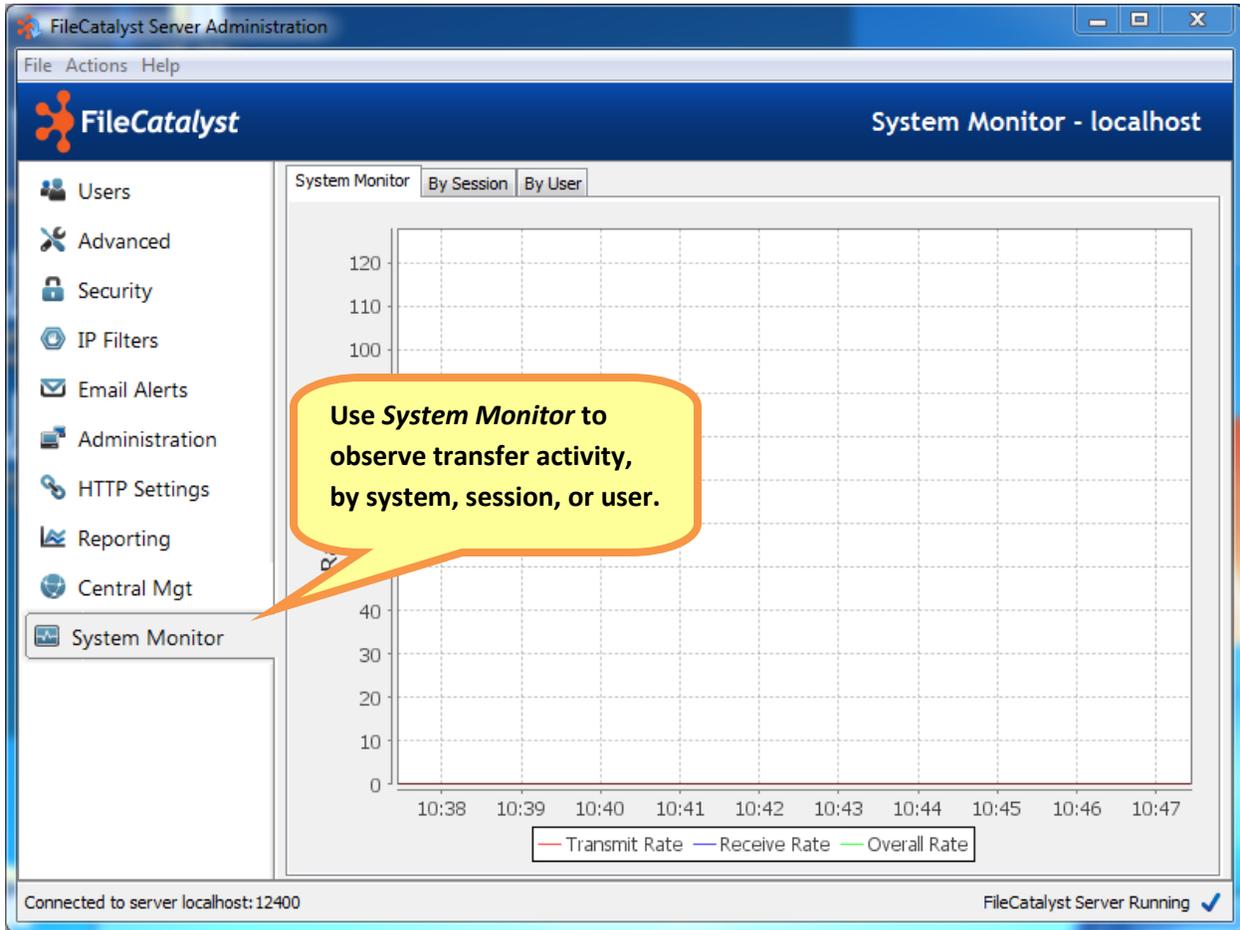
Server is not being Monitored.

Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

Enable Central Management (requires Central to be deployed) allows alarms and session information to be sent to Central.

5.5 System Monitor



If you will be proceeding to the HotFolder Quickstart, you might wish to leave the FileCatalyst Server Administration Client opened to this particular pane in order to test monitoring the system.

6 Next Steps

By the end of this guide, you should have successfully completed steps allowing you to:

- install FileCatalyst Server
- run FileCatalyst Server as a standalone application
- license the application
- create a test user account

You may now move to the HotFolder Quickstart guide. If you are using Windows you may wish to set FileCatalyst Server to run as a service. You may also wish to take this opportunity to explore the user documentation and learn about FileCatalyst Server's advanced features.

7 Support

For support contact information, support hours and live chat: visit our support website at <https://support.filecatalyst.com>.

