

**FORTRA**

# **FileCatalyst**

*FileCatalyst Server*  
*QuickStart Guide*



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# Introduction

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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 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

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.

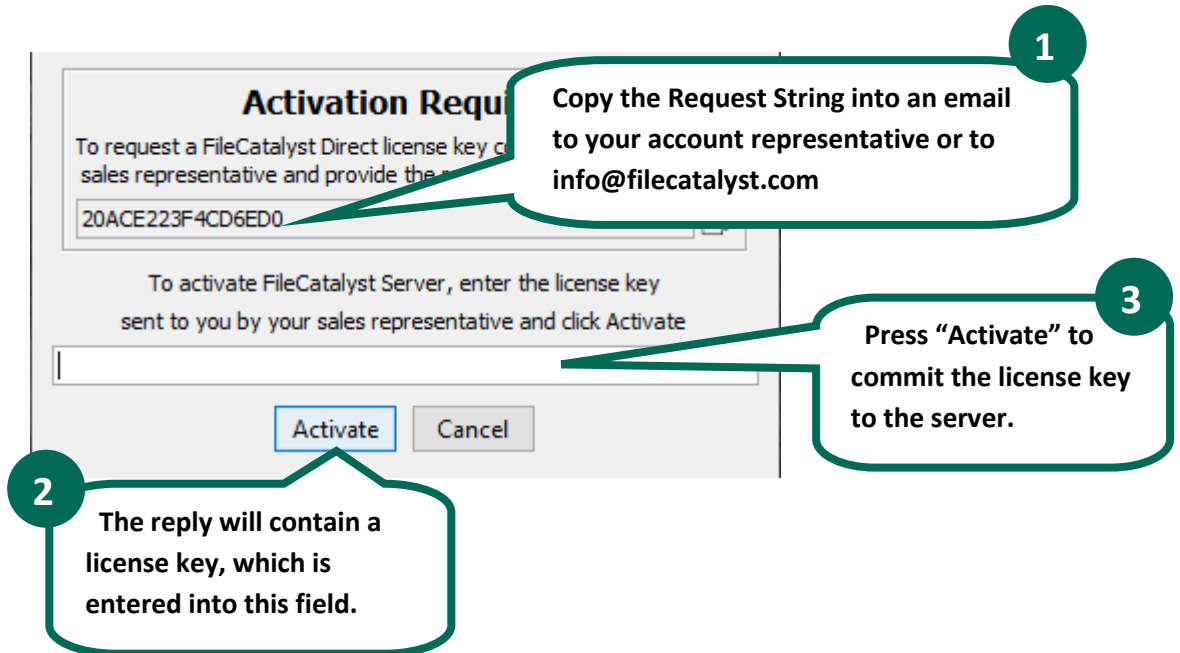
## 1.4 Enable Service

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.





## 2.2 Updating a License Key

You may later wish to update your license key (e.g. 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 displays the FileCatalyst Server Administration Console. The left sidebar contains a menu with 'Advanced' highlighted. The main panel shows the 'Server License' tab. The 'Request String' field contains '20ACE223F4CD6ED0'. The 'License Key' field is empty. The 'License Description' field contains a list of features: Integrations, FC Web, Alarms, Remote Admin, Remote Admin Applet, HTTP Transfers, Server API, Mobile clients, and GoAnywhere MFT. The 'Apply' button is 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

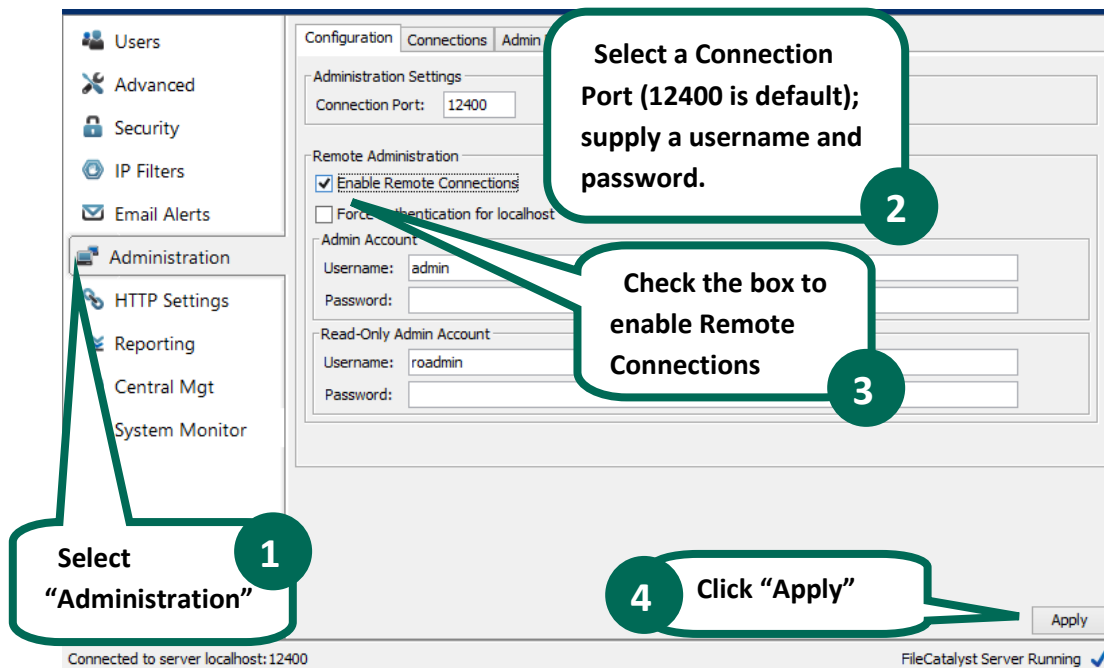
FileCatalyst Server Running ✓

### 3 Remote Administration

To remotely administer FileCatalyst Server, the option must first be enabled. The Remote Server Administration tool is then installed on another computer (e.g., your own workstation).

#### 3.1 Enable Remote Administration

Open FileCatalyst Server on the server machine. Then:



## 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.

The screenshot shows the FileCatalyst Server Administration web interface. On the left is a sidebar menu with options: Users, Advanced, Security, IP Filters, Email Settings, Administration, HTTP Settings (selected), Link, Reporting, Central Mgt, File Systems, and System Monitor. The main content area is titled 'General Settings' and contains several sections:

- General Settings:** Includes checkboxes for 'Enable HTTP Transfers', 'Enable Link', and 'Use SSL'.
- HTTP Config:** Includes a dropdown for 'Access IP' (set to 127.0.0.1), a checkbox for 'Bind all interfaces', and a text field for 'Web Port' (set to 12480).
- Access Links:** Displays URLs for 'Webroot' (<http://127.0.0.1:12480>), 'Servlet' (<http://127.0.0.1:12480/servlet/ftpservlet>), and 'Link' (<http://127.0.0.1:12480/ta/link/welcome.html>). A hint below states: 'Click links to open in default browser or right click to copy to clipboard'.
- Web Server Integration:** Includes a note: 'Allows for integration with 3rd party web servers such as Apache or IIS. Note that this will prevent the standard HTTP from working. All access must go through the configured web server.' and a checkbox for 'Enable AJP Connector'.

An 'Apply' button is located at the bottom right of the configuration area. At the bottom of the page, a status bar shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a green checkmark.

## 3.3 Install Remote Server Administration Client

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

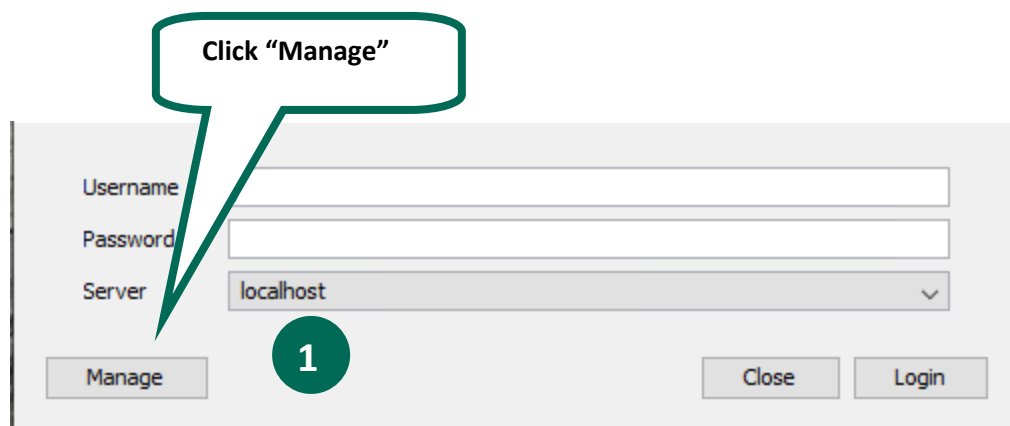
```
> ./fc_server_admin.sh
```

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:



The 'Manage Connections' dialog box is shown. It has a list on the left containing 'localhost'. On the right, there are three input fields: 'Site Name', 'Remote Administration Host', and 'Port'. At the bottom, there are three buttons: 'Add New Site', 'Delete', and 'Close'.

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)

4 Press "Close"

The 'Server Administration' window is shown. It has a title bar with standard window controls. Below the title bar, it says 'Server Administration' and 'Enterprise v3.8.6 Build 26 (09/28/2022 2027)'. There are three input fields: 'Username' (containing 'Admin'), 'Password' (containing dots), and 'Server' (a dropdown menu showing 'Test Site'). At the bottom, there are three buttons: 'Manage', 'Close', and 'Login'.

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 screenshot displays the FileCatalyst Server Administration web interface. The top navigation bar includes 'File', 'Actions', and 'Help'. The left sidebar contains a menu with 'Users' (selected), 'Advanced', 'Security', 'IP Filters', 'Link', 'Reporting', 'Central Mgt', 'File Systems', and 'System Monitor'. The main content area shows the 'User List (2)' tab, which contains a table with two users: 'anonymous (Disabled)' and 'user'. The 'user' row is highlighted, and the 'Add New User' button is visible. Three numbered callouts provide instructions: 1. 'Select "Users" from menu' points to the 'Users' menu item. 2. 'Make sure "User List" tab is selected' points to the 'User List (2)' tab. 3. 'Press "Add New User" button to launch wizard' points to the '+ New' button.

FileCatalyst Server Administration

File Actions Help

Users

Advanced

Security

IP Filters

Link

Reporting

Central Mgt

File Systems

System Monitor

User List (2) Group List (0) File/Folder List (0) Authentication User List (2)

+ New

anonymous (Disabled)

Anonymous C:/Program Files/FileCatalyst Server/...

user

Default User -- C:/Program Files/.../Server/data/...

Connect Delete Edit Browse

1 Select "Users" from menu

2 Make sure "User List" tab is selected

3 Press "Add New User" button to launch wizard

Connected to server localhost:12400

FileCatalyst Server Running ✓

The “Add User” wizard will launch:

FileCatalyst Server Administration

Add User Wizard

**Basic User Settings**

This menu allows you to enter the authentication information for the user. Username cannot be changed or modified once created.

Username

Password

Confirm Password

Select a username and password for a test user; confirm the password.

4

Close Next >

Connected to server localhost:12400 FileCatalyst Server Running ✓

FileCatalyst Server Administration

Add User Wizard

## User Information

These optional fields can be used to specify more information about the user.

Full Name

E-Mail Address

5 Optionally set the user's Full Name and email address.

6 Click "Next" to continue.

< Back Next >

Connected to server localhost:12400 FileCatalyst Server Running

FileCatalyst Server Administration

Add User Wizard

## Account Information

Enter the user home directory and permissions within the user's directory structure.

Home Directory

C:\Program Files\FileCatalyst Server\data\user\_001

Browse

File Permissions

- ☒ Download Files
- ☒ Upload Files
- ☒ Modify/Overwrite Files
- ☒ Delete Files
- ☒ Rename Files

Folder Permissions

- ☒ List Directories
- ☒ Create Directories
- ☒ Modify Directories
- ☒ Delete Directories
- ☒ Rename Directories

Read/Write Read Only Write Only Clear

7 Set a Home Directory (or use default).

8 Set Permissions.

9 Click "Finish" to exit wizard.

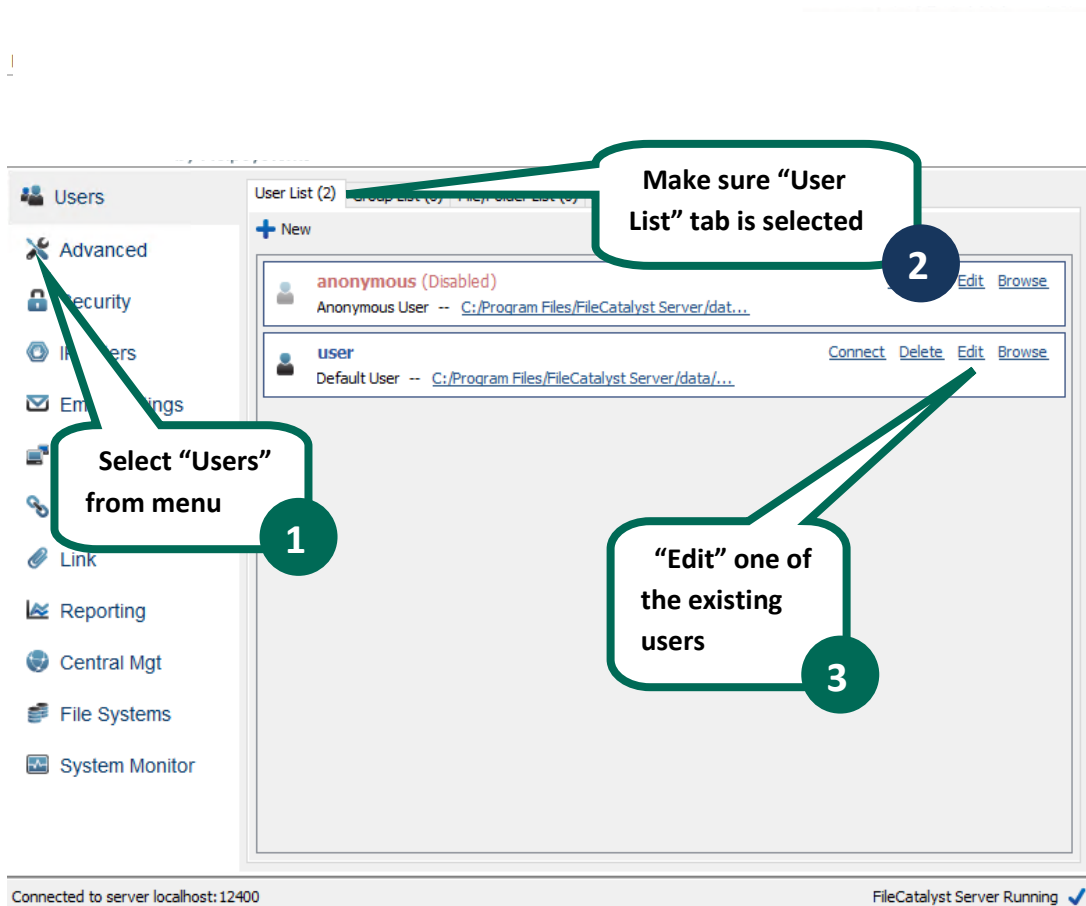
Connected to server localhost:12400 FileCatalyst Server Running



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

## 4.2 Editing a User

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



The “Edit User” options will appear:

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

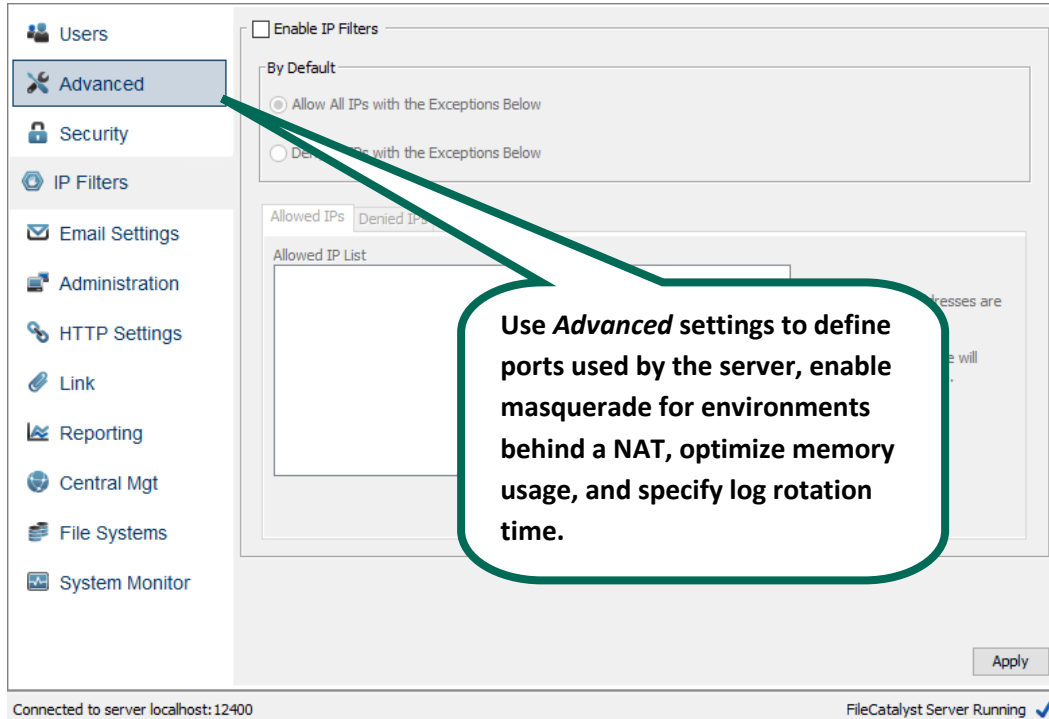
**User Permissions**— (all enabled by default) allow the administrator to limit specific users from certain file manipulation functions

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

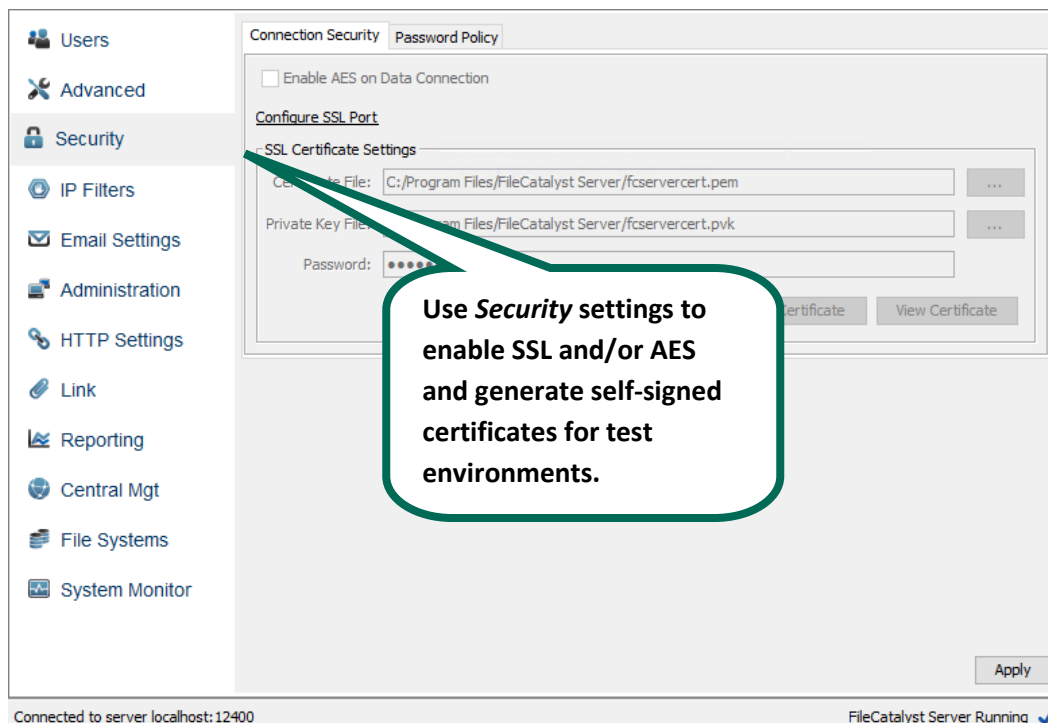
## 5 Additional Features

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.

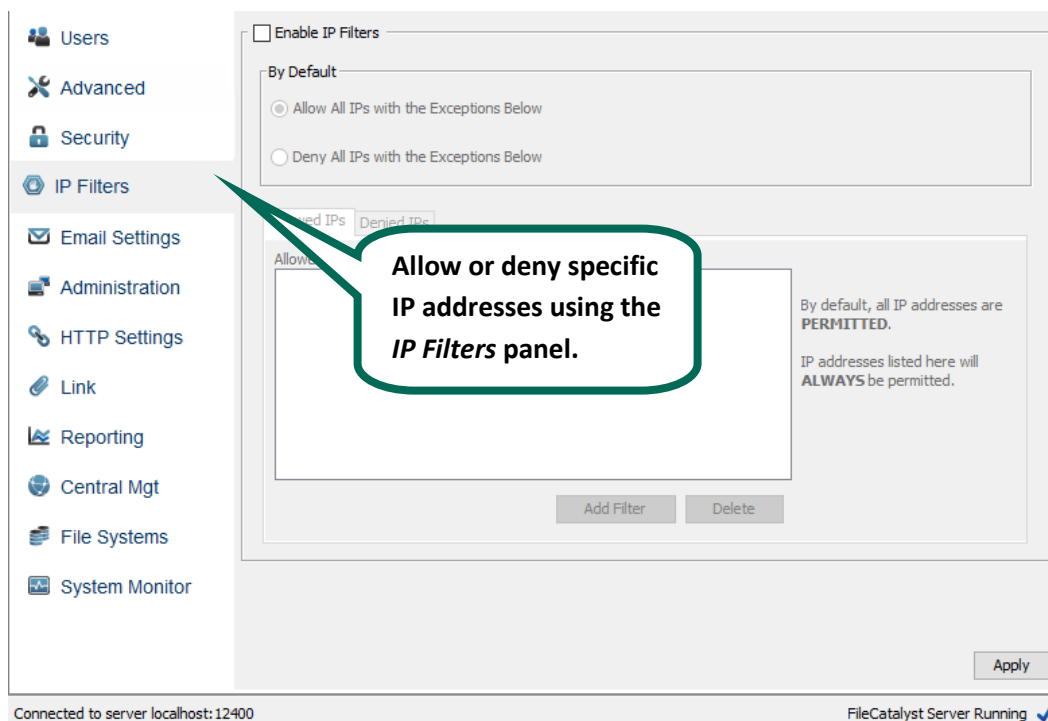
### 5.1 Advanced Settings



## 5.2 Security



## 5.3 IP Filters



## 5.4 Email Alerts

The screenshot shows the FileCatalyst Server Administration web interface. The title bar reads 'FileCatalyst Server Administration'. The menu bar includes 'File', 'Actions', and 'Help'. The logo 'filecatalyst by HelpSystems' is on the left, and the page title 'Email Settings - localhost' is on the right. A sidebar on the left contains links to 'Users', 'Advanced', 'Security', 'IP Filters', 'Email Settings' (highlighted), 'Administration', 'HTTP Settings', 'Link', 'Reporting', 'Central Mgt', 'File Systems', and 'System Monitor'. The main content area is titled 'Email Settings' and contains two sections. The first section, 'SMTP Settings', includes fields for 'Admin Email:', 'SMTP Server:', 'Port:' (set to 25), 'Enable Authentication' (checkbox), 'Username:', 'Password:', and 'Use SSL' (checkbox), along with a 'Test SMTP Settings' button. The second section, 'Enable E-Mail Alerts', has an unchecked checkbox and a text field for 'Email Subject' containing 'FileCatalyst Transfer Notification'. A green callout box points to the 'Enable E-Mail Alerts' checkbox with the text: 'Enable E-Mail Alerts for successful and incomplete transfers. E-Mail Alerts must be enabled on the Server for HotFolder e-mail notifications to function.' At the bottom, there is an 'Apply' button and a status bar showing 'Connected to server localhost:12400' and 'Server Running' with a checkmark.

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

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

## 5.5 Administration

Configuration Connections Admin Filters

Administration Settings

Connection Port: 12400

Remote Administration

☐ Enable Remote Connections

☒ Enable HTTP Remote Administration

☐ Force authentication

Admin Account

Username:

Set Admin Password

Read-Only Admin Account

Username:

Set Read-Only Admin Password

Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

**Use Administration to enable remote connections and set an admin or read-only admin password.**

## 5.6 HTTP Settings

General Settings

☐ Enable HTTP Transfers ☐ Enable Link ☐ Use SSL

HTTP Config

Access IP: 127.0.0.1  Bind all interfaces ☐

Web Port: 12480

Access Links

Webroot: <http://127.0.0.1:12480>

Servlet: <http://127.0.0.1:12480/servlet/ftpservlet>

Link: <http://127.0.0.1:12480/ta/link>

Hint: Click the link to view the details.

Web Server Integration

Allows for integration with 3rd party web servers. Note that this will prevent the standard web administration functionality for users.

☐ Enable AJP Connector

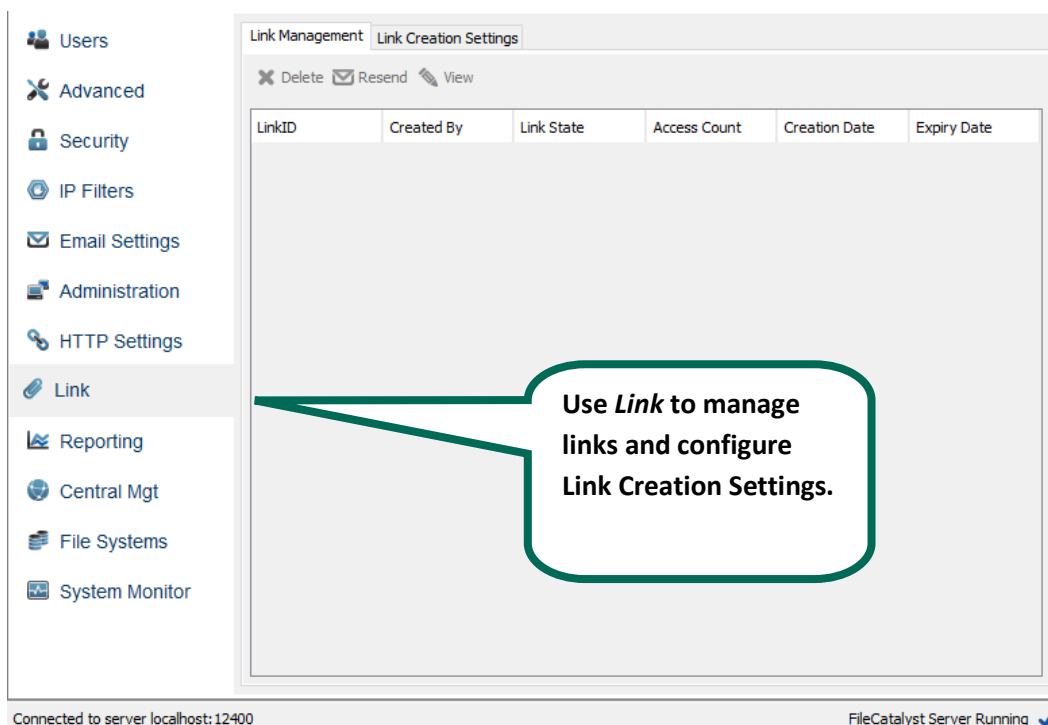
Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

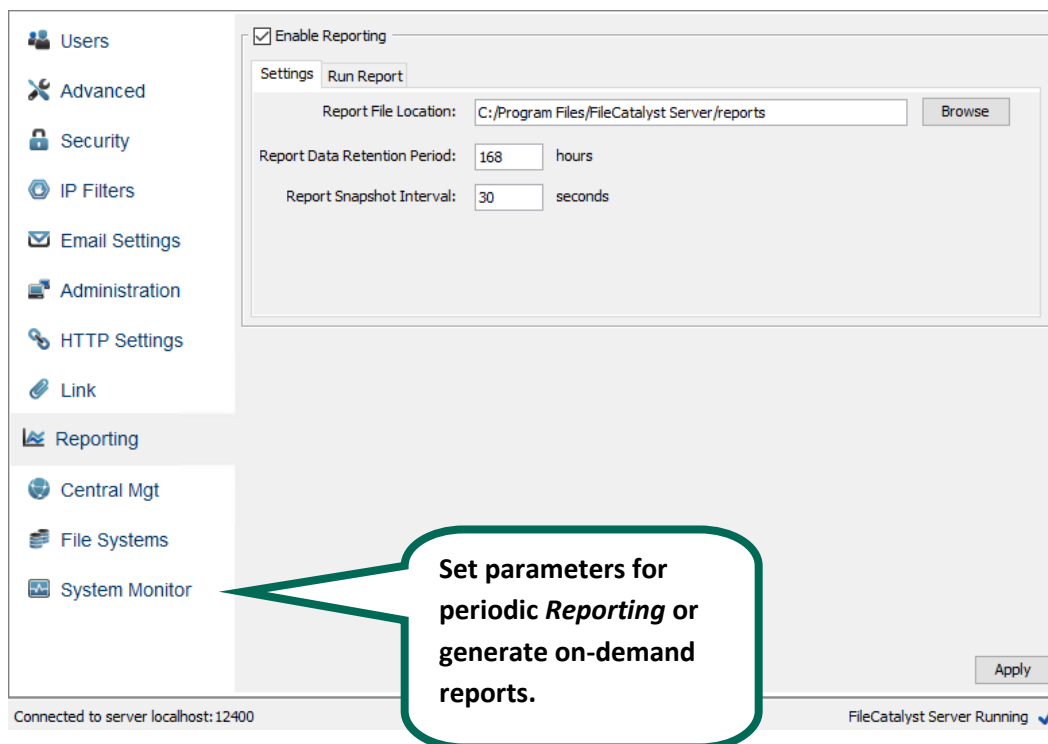
**Use HTTP Settings to enable HTTP Transfers, Link, and SSL.**

**Additionally, HTTP Settings is used to enable web administration functionality for users.**

## 5.7 Link



## 5.8 Reporting



## 5.9 Central

The screenshot shows the 'Central Mgt' configuration page. On the left is a sidebar with navigation links: Users, Advanced, Security, IP Filters, Email Settings, Administration, HTTP Settings, Link, Reporting, Central Mgt (selected), File Systems, and System Monitor. The main panel has a checkbox 'Enable remote monitoring of service' which is unchecked. Below it is a warning: 'This will enable and lock Reporting if required and start the HTTP server for local access if it is not currently running'. The 'Central' section contains fields for Address (127.0.0.1), Port (12500), User (monitor), and Password (masked with dots). The 'FC Server' section contains fields for IP (127.0.0.1), Hostname (127.0.0.1), Alias, and Server Alias. A status message at the bottom left says 'Server is not being monitored'. A green callout bubble points to the 'Server is not being monitored' text and contains the text: 'Enable Central Management (requires Central to be deployed) allows alarms and session information to be sent to Central.' An 'Apply' button is at the bottom right. The status bar at the very bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

☐ Enable remote monitoring of service

This will enable and lock Reporting if required and start the HTTP server for local access if it is not currently running

Central: Address Port

127.0.0.1 12500

User

monitor

Password

.....

FC Server: IP

127.0.0.1

Hostname

127.0.0.1

Alias

Server Alias

Server is not being monitored

Apply

Connected to server localhost:12400 FileCatalyst Server Running ✓

## 5.10 File Systems

The screenshot shows the 'File Systems' configuration page. The sidebar is identical to the previous screenshot, with 'File Systems' selected. The main panel has a '+ New' button at the top left. Below it is a section titled 'Local Files' with a file icon. The rest of the panel is empty. A green callout bubble points to the 'File Systems' link in the sidebar and contains the text: 'Use File Systems to add external file systems such as Dropbox, Encrypted folders, Google Cloud Storage, and many others.' The status bar at the bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

+ New

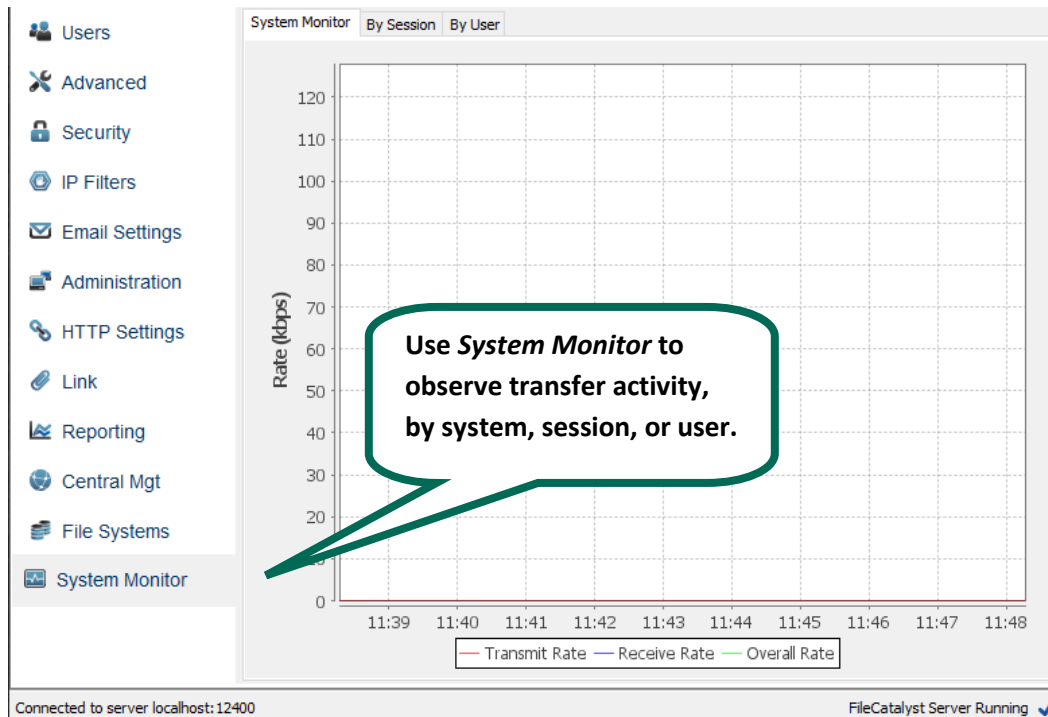
Local Files

Use File Systems to add external file systems such as Dropbox, Encrypted folders, Google Cloud Storage, and many others.

Connected to server localhost:12400 FileCatalyst Server Running ✓



## 5.11 System Monitor



If you will be proceeding to the HotFolder QuickStart, you might wish to leave the FileCatalyst Server Administration Client opened to this pane 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

Looking for help? We're committed to helping you resolve any issues with your file transfer solutions so you can get back to business. If you've run into an issue, our experienced support

team can quickly help you resolve it. And if you need assistance finding product downloads or manuals, we can point you in the right direction.

Available services include:

- Submitting a trouble ticket:
  - To submit a trouble ticket to our Support team, please log in to the [Customer Portal](#), click Support from the top menu bar, and Submit New Case.
- Sending an email:
  - For assistance, send an email to [support.filecatalyst@helpsystems.com](mailto:support.filecatalyst@helpsystems.com)

You can also:

- Search the [Knowledge Base](#) for solutions to common questions
- Contact us at: +1(613) 667-2439 or +1 (877) 327-9387 (toll-free in Canada and USA)