

infoDirect®

USER GUIDE

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Table of Contents

- 1. Overview 1**
 - Requirements1
 - Access infoDirect.....1

- 2. Get Started..... 2**
 - Access infoDirect.....2
 - Log In and Log Off from infoDirect2
 - Change Password3
 - Set Up Default Download Location4

- 3. Sort, Filter, and Download Files 8**
 - Sort8
 - Filter8
 - Download.....9

1. Overview

Pershing's infoDirect[®] is an easy-to-use Web interface to access and download Pershing Standard files. infoDirect allows for the receipt of standard files using the HTTP Secure (HTTPS) protocol using the latest Transport Layer Security (TLS) allowing for data and session-level privacy and integrity.

Requirements

- Recommended browser: Mozilla[®] Firefox[®], but you can also use Google Chrome[™] and Microsoft[®] Internet Explorer[®] versions 7 and 8.
- Internet access through your firm's Internet Service Provider (ISP)
- An infoDirect consumer ID and password

Note: On successful completion of the infoDirect setup for your firm, a Pershing Data Delivery Group (DDG) associate will send you the consumer ID and password in two separate emails.

- Access to a local directory on your desktop or laptop

Access infoDirect

You can access infoDirect via one of the following methods:

- Using an internet browser: Access <https://mfgw.sfg.pershing.com/infoDirect/> and then enter your consumer ID and password.
- Using NetX360 for Windows: Enter your infoDirect consumer ID and password.

2. Get Started

Before you can download files from the mailbox, it is important to create a folder on your local to save the files.

Access infoDirect

You can access infoDirect directly from its Web address, or from within NetX360 for Windows.

Note: Ensure you have all the required information as indicated in the [Requirements](#) section.

Access infoDirect via Direct Web Address

1. Open your web browser
2. In the Address box, enter <https://mfgw.sfg.pershing.com/infoDirect/> and then press ENTER.

Access infoDirect via NetX360

1. Click **Tools > INFO Direct FTP**.
2. Click **Launch infoDirect** site. The infoDirect-home page displays in its own browser window.

Log In and Log Off from infoDirect

Log In to infoDirect

Note: If you logged in already to infoDirect, see [Download](#).

1. Access the infoDirect home page. For more information, see [Access infoDirect](#).
2. Click **Admin > Login**.
3. Enter your Consumer ID and Password.
4. Click **Logon**. The **Files available for download** page displays.

Tip: Scroll down the page to view the total number of batches (files).

Log Off from infoDirect

- Click **Admin > Logout**. A message displays if the Logoff is successful.

Change Password

The screenshot shows a web form titled 'Change Password'. At the top, there is a tab labeled 'Password'. Below the tab, there is a lock icon and the text 'Password Modify your password here.'. The form contains three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. At the bottom right of the form, there are two buttons: 'Clear' and 'Save'.

The **Change Password** page enables you to change your first-time login password and all your password changes in future.

Note: Change your first-time login password as soon as you log in to infoDirect for the first time. infoDirect passwords expire every 60 days. Password is case sensitive and must contain minimum of eight characters. Your last five passwords remain in the application history and you cannot re-use these passwords.

Change Password

1. On the **infoDirect** home page, click **Profile**. The password page displays.
2. In the **Current Password** field, enter the password you used to log in.
3. In the **New Password** and **Confirm New Password** fields, enter your new character password and click **Save**.

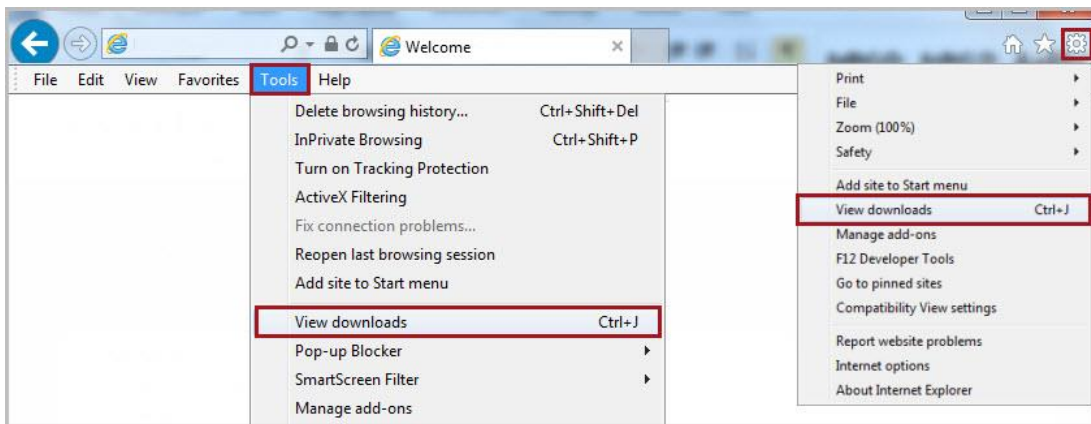
Set Up Default Download Location

You can set up a location where you want to save the files by default. This eliminates the need to select a location or folder each time you download files.

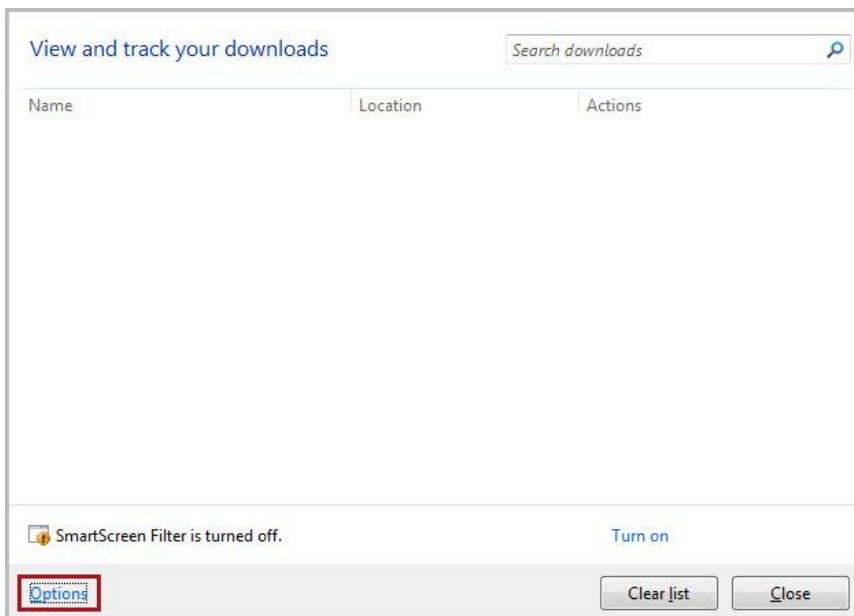
Set Up a Default Download Location Using Microsoft Internet Explorer

1. Open Microsoft Internet Explorer.
2. Click **Tools** > **View Downloads**.

Tip: Press the shortcut key, **Ctrl+J**, to open the **View Downloads** window. You can also click the cogwheel available to the right to display the context menu. From the context menu, click **View downloads**.

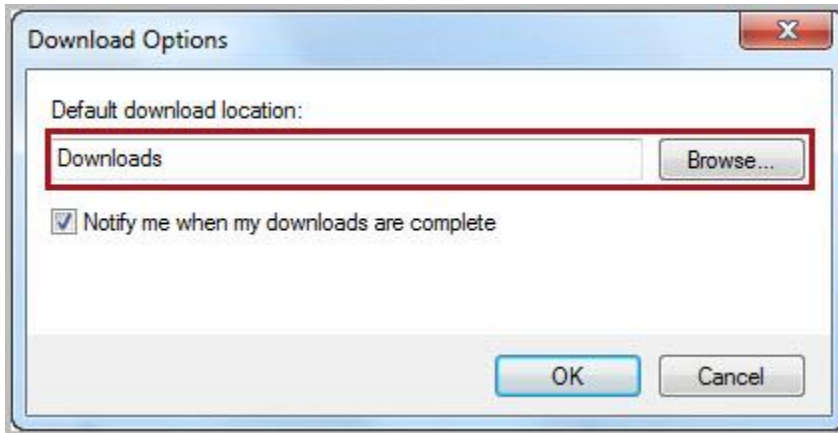


3. In the lower left corner of the window, click **Options**.



4. Click **Browse** to select the required folder where you want to save the downloaded files.

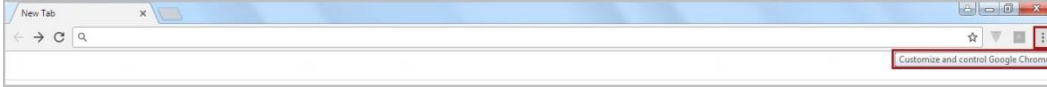
Note: It is advisable to create a new folder to save the files.



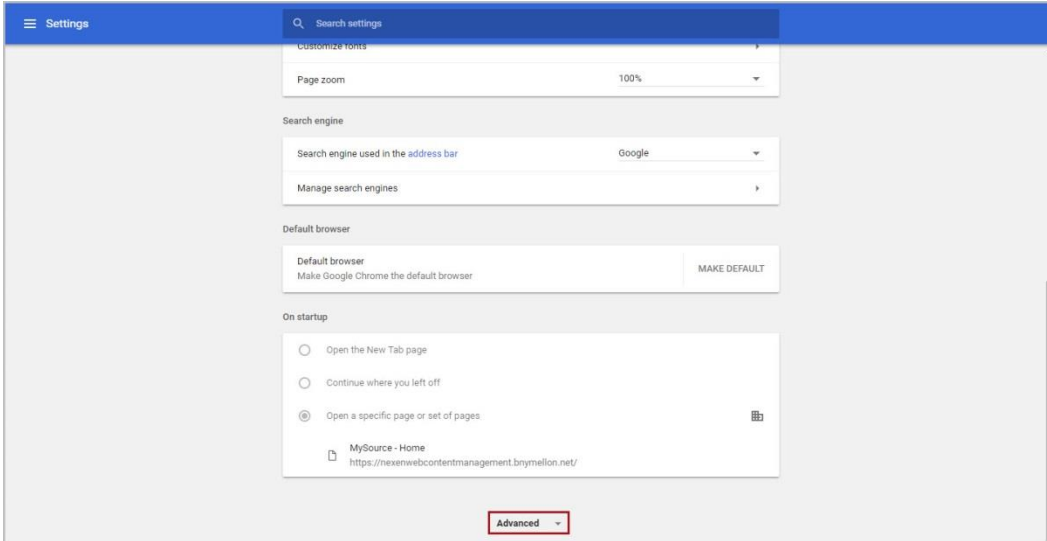
5. Click **OK** to save the changes.

Set Up a Default Download Location Using Google Chrome

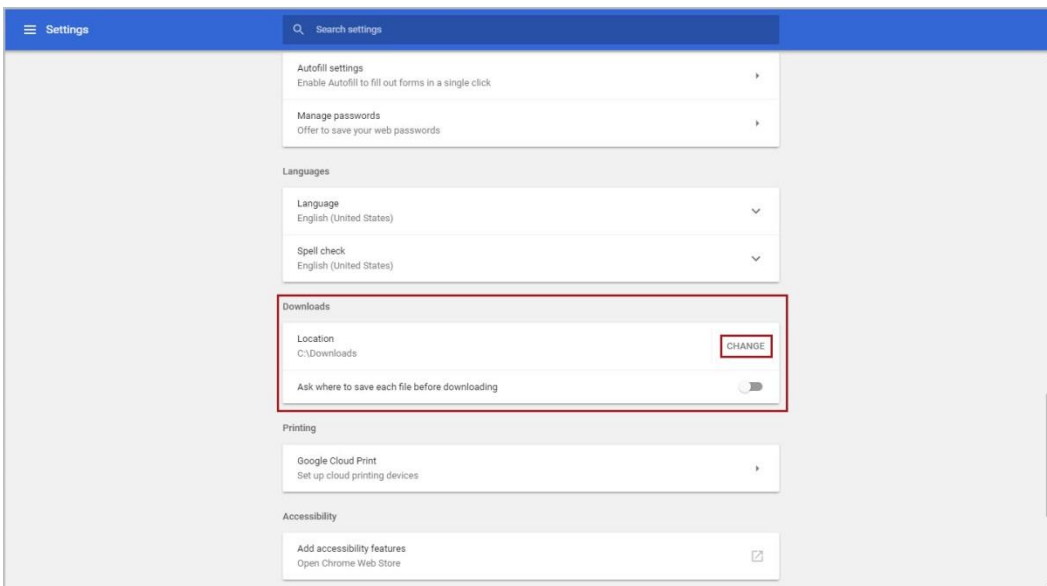
1. Open Google Chrome.
2. Click **Customize and control Google Chrome > Settings**.



3. Scroll to the bottom of the page and click **Advanced**.



4. In the **Downloads** section, click **Change** to browse and select the required folder where you want to save the downloaded files.

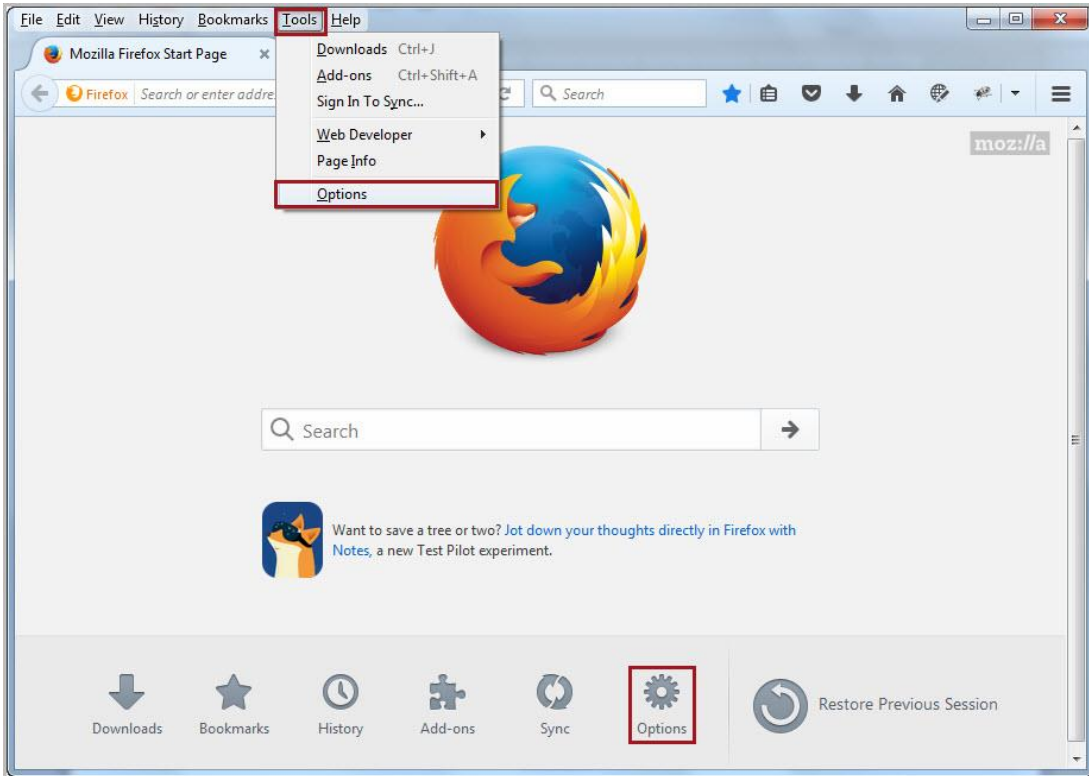


5. After selecting the folder, close the **Settings** tab to save your changes.

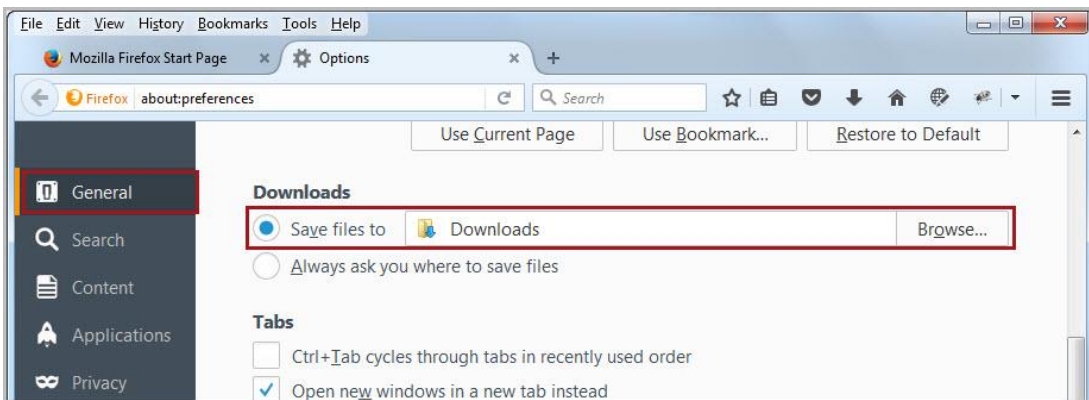
Set Up a Default Download Location Using Mozilla Firefox

1. Open Mozilla Firefox.
2. Click **Tools > Options**.

Tip: You can also click the **Options** icon in the panel displayed below on the window.



3. In the left panel, click **General** and in the **Downloads** section, click **Browse** to browse and select the required folder where you want to save the downloaded files.



4. After selecting the folder, close the **Options** tab to save your changes.

3. Sort, Filter, and Download Files

Sort

Download Files	
Download a file Filter your mailbox by using the column input fields	
Received ▼	File Name
12/04/2017 12:31:22	120117.4CRM
12/03/2017 17:10:03	120117.4CRM
12/02/2017 15:07:28	120117.4UFN

The sort feature enables you to reorder the information in ascending or descending order. You can apply the sort to columns on any page that has a table-like structure. To sort the information, click on a column heading to sort in ascending order, and click the heading again to sort the information in descending order.

An upward triangle indicates ascending sort order. A downward triangle indicates descending sort order.

Filter

Download Files	
Download a file Filter your mailbox by using the column input fields	
	120117.4crm
Received ▼	File Name
12/04/2017 12:31:22	120117.4CRM
12/03/2017 17:10:03	120117.4CRM
12/02/2017 12:56:04	120117.4CRM

The filter feature enables you to view only the information that you require. To filter the information, enter the required information in the text field above the column heading and press **Enter**.

Download

The Home page displays all the files available for you to download. The page displays files for the previous two weeks. You can only download one file at a time.

Download a File

Download Files

Download a file
Filter your mailbox by using the column input fields

Received ▼	File Name	Mailbox
12/04/2017 12:31:22	120117.4CRM	Inbox
12/03/2017 17:10:03	120117.4CRM	Inbox
12/02/2017 15:07:28	120117.4UFN	Inbox
12/02/2017 14:20:20	120117.4POT	Inbox
12/02/2017 12:56:04	120117.4CRM	Inbox
12/02/2017 12:53:40	120117.4GCU	Inbox
12/02/2017 12:43:24	120117.4GMO	Inbox
12/02/2017 12:40:53	120117.4ACT	Inbox
12/02/2017 12:37:33	120117.4FUN	/SFD_CLIENT_INTSFD_WEB001/Inbox

Confirm

Are you sure that you want to download this file?

File: 120117.4CRM

From: /SFD_CLIENT_INTSFD_WEB001/Inbox

1. On the **Home** page, click on the row of the file you wish to download. A window displays.
2. On the window, click **OK** to download the file.

Tip: You can set up default download location to save the files. For more information, see [Set Up Default Download Location](#).