



infoDirect® is an easy-to-use Web interface to access Pershing Standard files. All you need is an Internet connection and a standard Web browser on your computer to receive files securely via HTTP Secure (HTTPS) protocol employing the latest Transport Layer Security (TLS), ensuring data and session-level privacy and integrity.

### Getting Started

New infoDirect sites are requested by the Introducing Broker Dealer using Service Center. The form is under Administrative Services – Standard File Requests in NetX360.

Category	Request	Request Type
Administrative Services	Standard Files	Create New InfoDirect Site

To Use infoDirect:

- Click on link: <https://mfgw.sfg.pershing.com/infodirect/>
- Review User Notifications
- Click the **Sign On** button
- Enter assigned **User ID** and **Password** and **Sign In**

*For detailed infoDirect instructions please refer to the Participant Guide on our Standard File Layout website found on the right under "infoDirect Information": [https://files.pershing.com/standard\\_files/layouts.html](https://files.pershing.com/standard_files/layouts.html)*

## WHAT TO EXPECT and QUICK USER TIPS

### General

Recommended browsers: Firefox provides the best user experience however, other browsers such as Chrome and Explorer will function

- Clear cache in browser before using for best results
- Sessions time out after 5 minutes of idle time

### User ID, Password and Frame Screen

- Please reset assigned password upon initial login
- Change password in **Profile** screen, accessed on top right
- Passwords expire every 60 days
- Passwords can be reset by user in Profile screen at any time
- Number of passwords kept in history is 5
- No lockout upon incorrect login/password entry at this time
- User ID cannot be changed
- **Home** returns user to User Notifications screen
- **Sign On** returns user to Sign In screen or **Download Files** directory screen if logged on



- All other frame screen links bring user to our Standard File Layouts website (*see infoDirect Information on right website*)

#### File Downloads

- infoDirect uses the file naming convention MMDDYY.FORM (Example: **110218.GCUS**)
- File order in directory can be changed by clicking on the blue **Received** or **File Name** directory column headings
- Files are downloaded one at a time only
- File downloads are not zipped/compressed
- Files are available in directory for two weeks from date of initial transmission
- Files in directory can be downloaded as many times as required
- infoDirect only receives (downloads) files; it cannot send (upload) files
- To set a new default download location for your files on your computer please see instructions on our Participant Guide document under Helpful Resources on our Standard files website