



All InfoDirectFTP users will migrate to the new infoDirect platform in 2018.

FREQUENTLY ASKED QUESTIONS:

What is the new infoDirect website?

The new infoDirect website is <https://mfgw.sfg.pershing.com/infodirect/> but you cannot Sign On to it without your new User ID and your files will not be sent there until you are migrated.

When can I expect to be migrated?

All users should expect to be migrated this year.

How do I login?

- Clear cache in browser before using for best results
- Review User Notifications
- Click the **Sign On** button
- Enter assigned **User ID** and **Password** and **Sign In**
- The default password must be reset upon initial login.

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

How do I change my password?

- On the **infoDirect** home page, click **Profile**. The password page displays.
- In the Current Password field, enter the password you used to log in.
- In the **New Password** and **Confirm New Password** fields, enter your new 8 character
- In the **New Password** and **Confirm New Password** fields, enter your new 8 character password and click **Save**

What are the next steps of the migration process?

Pershing will distribute your new credentials and migration date to your broker dealer home offices, allowing several weeks for dispersal.

If you stop seeing new files on this site, check with your home office for your new ID.

Introducing Broker Dealer (home office) Operational Considerations

- One new infoDirect destination will be created for each existing one.
- Migrations will be done by IBD.
- Each IBD home office and their Pershing Account Manager will be given the list of their InfoDirect Destinations which will include the Destination ID, the InfoDirectFTP User ID, the corresponding new infoDirect User ID, and password.
- New credentials will be provided approximately two weeks prior to cutover.

Sample:

DEST	DEST DESCRIPTION	Current InfoDirectFTP User ID	New infoDirect User ID	New PW	Scheduled Migration Date
CAA	infodirect site for John Smith	id511caa	SFD_CLIENT_EXT_SFD_WEB001	12345678	1/5/2018

- The introducing broker dealer (IBD) will be tasked with reaching out to their Investment Professional(s)/InfoDirect Users with their new infoDirect login credentials.
- In the event you are unable to contact the user for any given site, we would expect any active users will reach out to their home office when they see they are not getting any new files via the old InfoDirect.
- In the event you are not contacted for a specific destination and you believe it is no longer active, you may submit a Service Center request to delete that destination.

How many days' worth of files will be available in new infoDirect?

The new infoDirect like the old InfoDirect will retain two weeks' worth of files.

- During the migration period, because two weeks' worth of files are saved in both versions, and files will not start to be saved on the new infoDirect for the user until they are migrated, there will be a two week period when the user will have to go to the legacy website to retrieve previous files.

Are there any restrictions?

- A permanent re-direct for the downloads cannot be set for the product

How do you stop from getting the “Are you sure you want to download this file” message shown on screen below?

- Every time you select a file to download, you must select ok to confirm that download.
- You have to keep clicking OK, then you even have to click on where you want to save each file individually, unless accepting the default – “downloads”

Migration Recommendations and information

- 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

As always, our Technology Help Desk is available to assist you 24 hours a day, 7 days a week. United States customers can reach us at (888) 878-3142, option 4. International customers can use (732) 622-2150. Please contact your home office or your Pershing representative as appropriate if you have any questions.