



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

### Getting Started

The Introducing Broker Dealer (IBD) can request new infoDirect sites by submitting a Service Center request in NetX360. The Service Center path is: Administrative Services > Standard Files > Create New InfoDirect Site.

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

### To use infoDirect:

- Go to or click <https://mfgw.sfg.pershing.com/infodirect/>.
- Review the notifications you received.
- Click **Sign On**.
- Enter the assigned **User ID** and **Password**, and click **Sign In**.

For detailed infoDirect instructions please refer to the “Using InfoDirect User Guide” on our Standard File Layouts website, right, under “Delivery and Configuration Aids”: <https://standardfiles.pershing.com>

## **WHAT TO EXPECT and QUICK USER TIPS**

### General

Recommended browsers: Google Chrome™ provides best user experience. You can also use other browsers such as Mozilla® Firefox® or Microsoft® Internet Explorer®.

- Clear browser cache before using for best results.
- Session times out after 5 to 10 minutes idle time.



## User ID, Password, and Frame Screen

- You will be prompted to reset assigned password on initial login.
- Password expires every 60 days.
- When prompted, as in initial sign in or upon password expiration, you can change the password in the **Profile** screen, available on the top right (*interim manual password change is currently unavailable. Call our Help Desk for interim password change at Technology Help Desk at (888) 878-3142 or (732) 622-2150, option 4.*)
- Recently used passwords cannot be reused. *Number of passwords kept in history is five.*
- No lockout upon incorrect login/password entry at this time.
- User ID cannot be changed.
- To go to the User Notification screen, click **Home**.
- To go to the Sign In or Download Files (if signed in) directory screens, click **Sign On**.
- All other frame screen links take you to our Standard File Layouts website, <https://standardfiles.pershing.com> (see Delivery and Configuration Aids *on right*).

## File Downloads

- infoDirect uses the file naming convention MMDDYY.FORM (Example: **110218.GCUS**)
- You can change the file order in the directory by clicking on the blue **Received** or **File Name** directory column headings.
- You can download only one file at a time; though you can start the next subsequent download before the previous download finishes.
- File downloads are not zipped or compressed.
- You can access the files in directory for two weeks from date of initial transmission.
- You can download the files in directory as many times as required.
- You can only download infoDirect files. You cannot upload files.
- To set a new default download location for your files on your computer, see instructions in the “Using InfoDirect User Guide” document under Delivery and Configuration Aids on our Standard File Layouts website, <https://standardfiles.pershing.com>