

infoDirect®

USER GUIDE

February 2020



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# 1. Overview

infoDirect® is an easy-to-use Web interface to access Pershing Standard files. An internet connection and a standard Web browser on your computer are required to receive files securely via infoDirect.

infoDirect receives standard files using the HTTP Secure (HTTPS) protocol employing 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
- Internet access through your firm's Internet Service Provider (ISP)
- An InfoDirect consumer ID and password
- 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 computer to save the files.

### Create InfoDirect Folder

**Note:** You can skip this section if you already have an infoDirect folder (directory) on your local computer (or on your file server's hard drive if you are saving the downloaded files to your network).

1. On your local computer, access the Windows Desktop.
2. Double-click **My Computer** on your desktop.
3. Double-click the drive where you want the infoDirect folder to be available.
4. (Optional) Double-click the folder where you want the infoDirect folder to be available.
5. Position the mouse pointer in the window that you opened in the previous step, and right-click to display the shortcut menu.
6. On the shortcut menu, click **New** and then click **Folder**.
7. Enter a name for the folder (for example, infoDirect) and press **ENTER**.

**Note:** Ensure the folder name has no spaces. Some web browsers do not allow folder names and file names containing spaces.

8. Close the window you opened in steps 1, 2, and 3.

### Access infoDirect

You can access infoDirect directly from its Web address, or from within the Windows version of NetX360.

**Note:** Ensure you have all the required information as indicated in the Requirements on page 1.

#### 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 on your keyboard.

#### Access infoDirect via NetX360

1. Click **OFFICE > About Office**.
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 on page 10.

1. Access the infoDirect home page. For more information, see Access infoDirect on page 2.
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 the Logoff is successful.

## Change Password

The screenshot shows a web form titled "Change Password". At the top left, there is a tab labeled "Password". Below the tab, there is a lock icon and the text "Password" followed by "Modify your password here." The form contains three text 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 future password changes, but **ONLY** upon password expiration.

To change the password before its expiry, call the Pershing Technology Help Desk at 888-878-3142, option 4.

**Note:** infoDirect passwords expire after 60 days.

To change your password after expiry:

1. On the **infoDirect** home page, click **Profile**. The password page displays.
2. In the **Current Password** field, enter the password you used to login.
3. In the **New Password** and **Confirm New Password** fields, enter your new password and click **Save**. Password must be between eight and 20 characters in length.

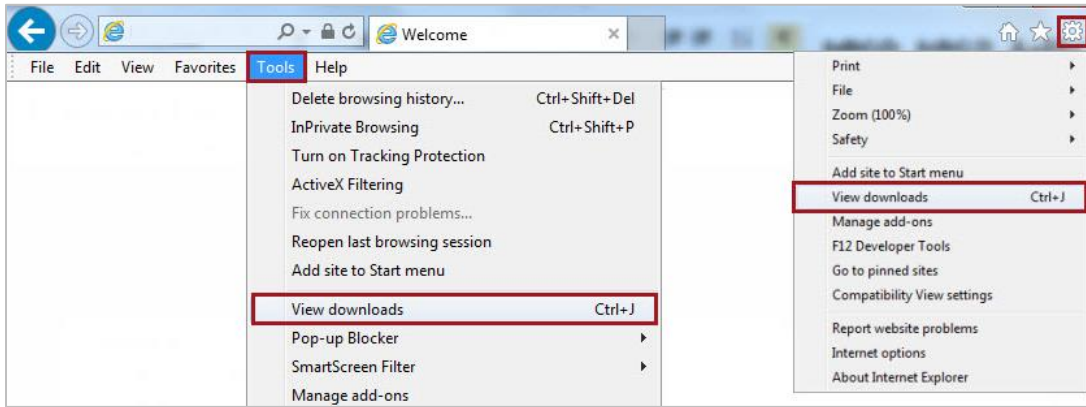
## Set Up Default Download Location

You can set default download location on your computer to save the downloaded files by default.

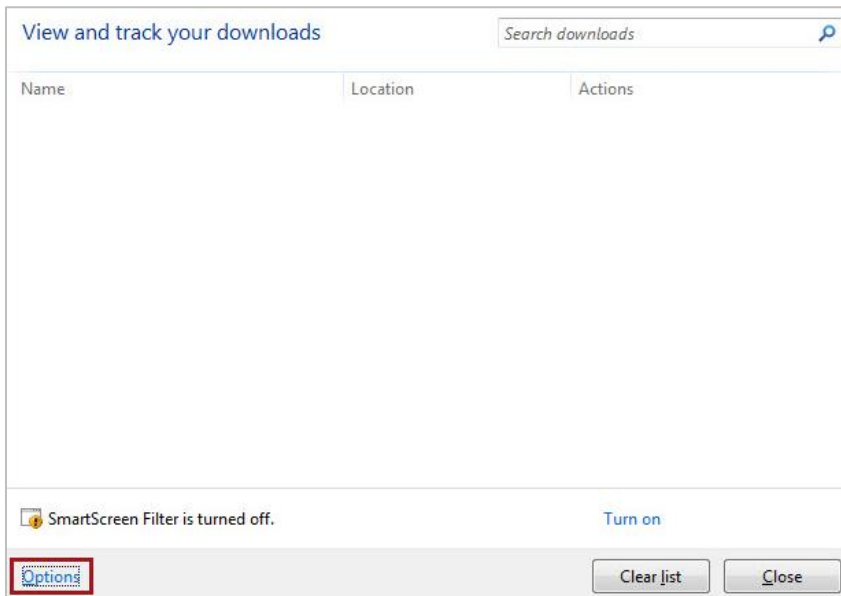
### Microsoft Internet Explorer

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**.

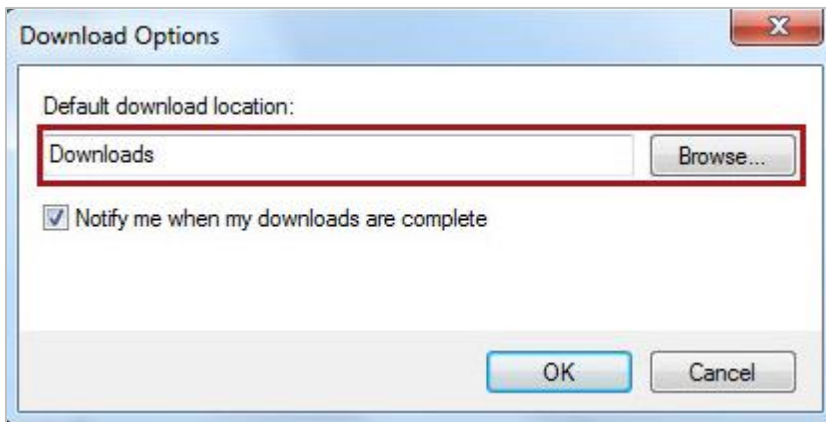


3. In the lower left corner of the window, click **Options**.



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.

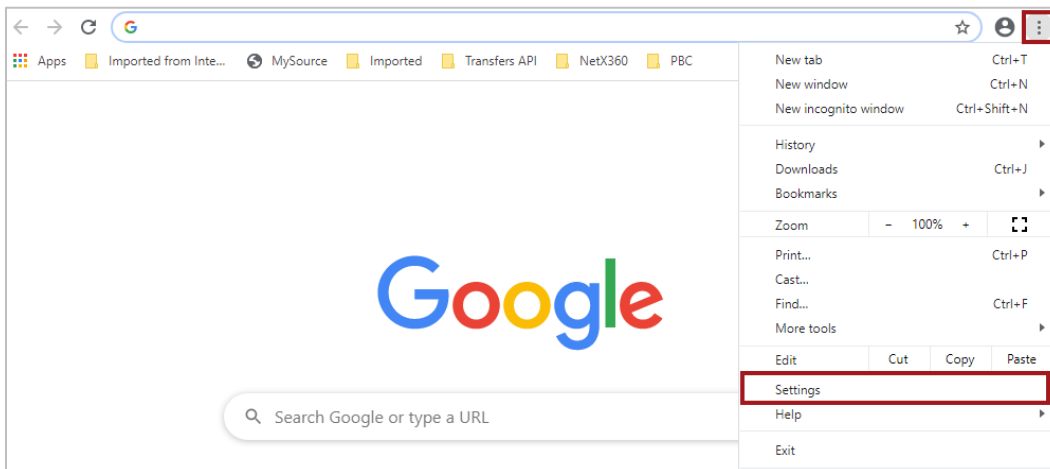


5. Click **OK** to save the changes.

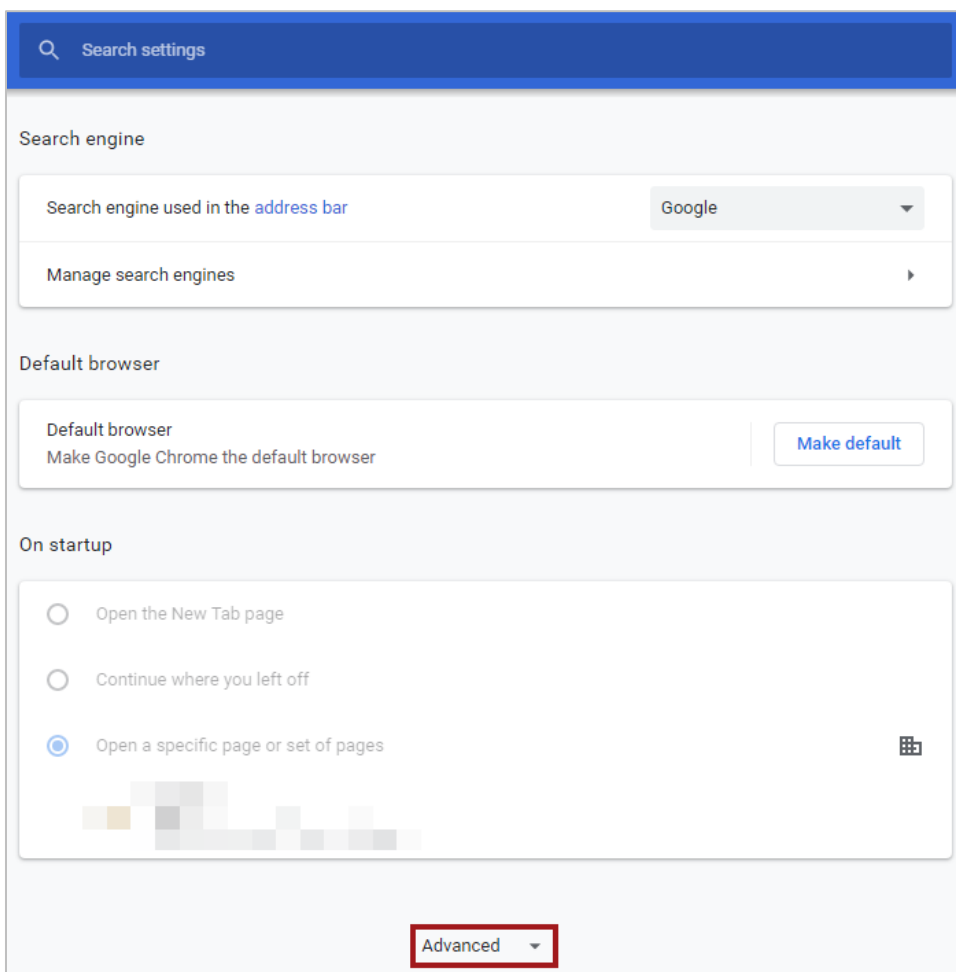


## Google Chrome

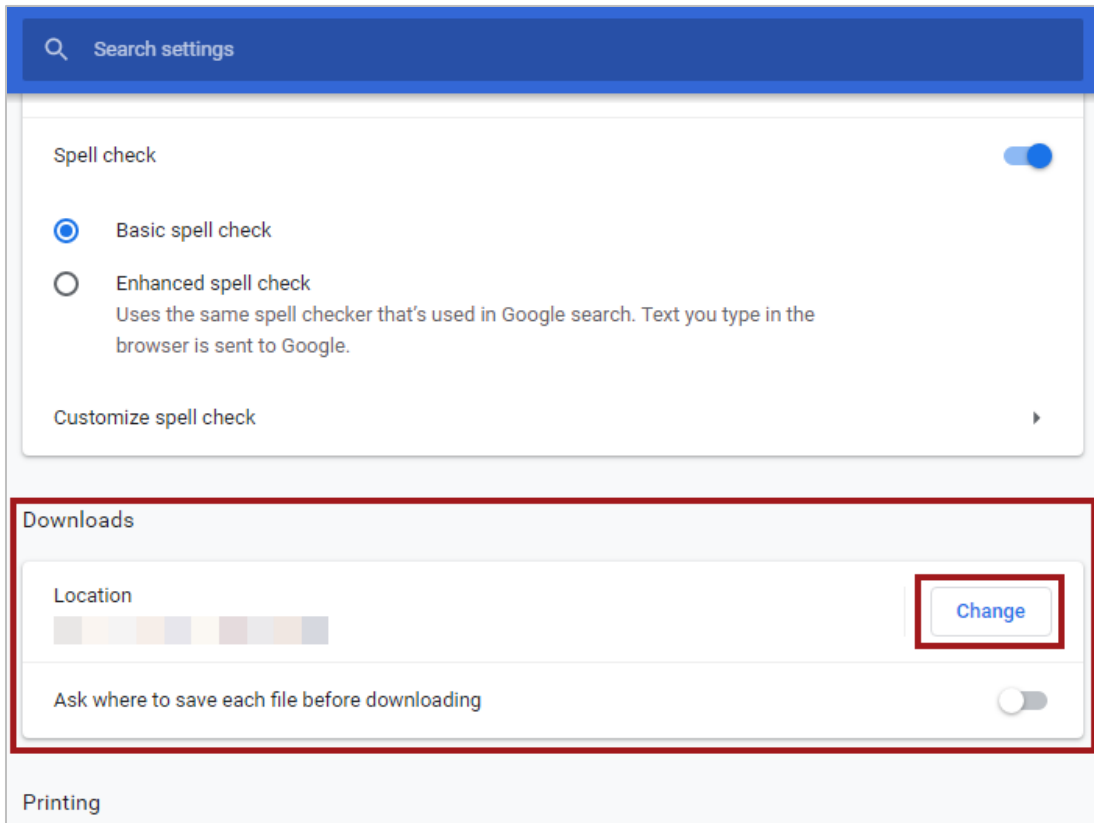
1. Open Google Chrome™.
2. Click the three dots available to the right and then click **Settings**.



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.

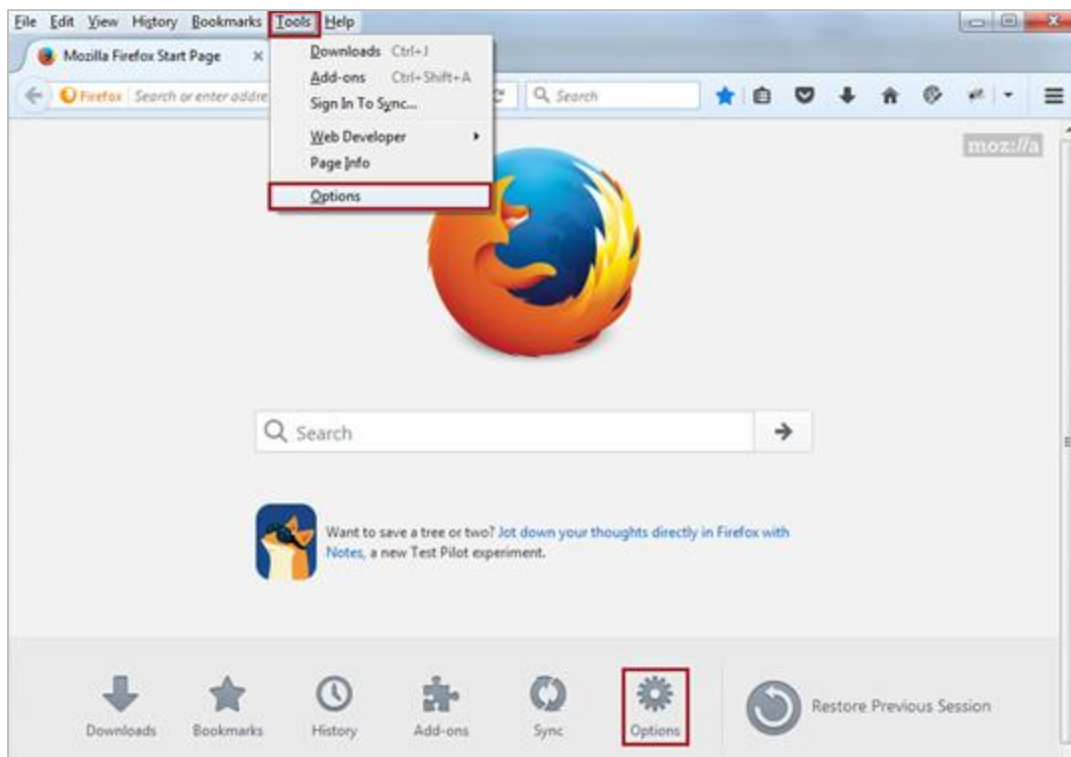


5. After selecting the folder, close the **Settings** tab to save your changes.

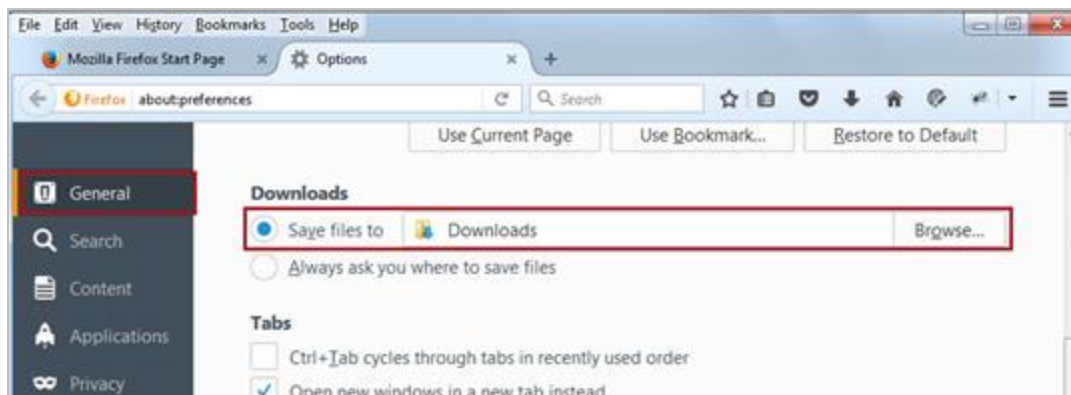
## Mozilla Firefox

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

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 required 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.

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

### Filter

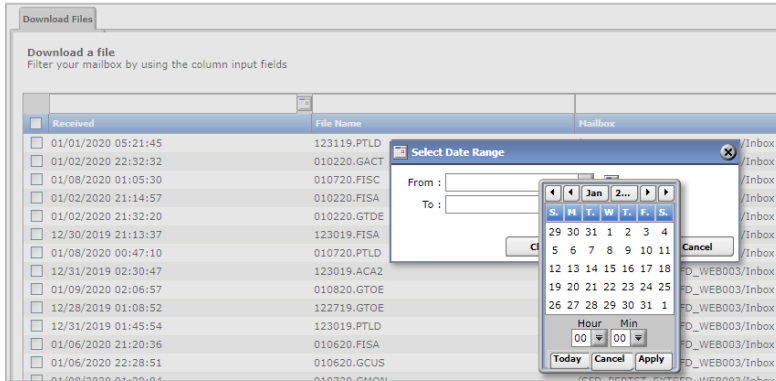
The filter feature enables you to view only the information that you require. To filter the information, enter the required information in the text field above the column heading and press **Enter** on your keyboard.

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

## Filter by Date

Filter by Date enables you to view the files for a specific date range. Enter or select the **From** and **To** Dates, and then click **Apply**.

1. Click the **Calendar** control above the **Received** column. The **Select Date Range** window displays.
2. Click the **Calendar** control or enter the **From** and **To** dates, and then click **Apply**.



3. Click the **Filter** icon to view the results.

Received	File Name	Mailbox	Filter
01/01/2020 05:21:45	123119.PTLD	/SFD_PERTST_EXTSFDF_WEB003/Inbox	62410 bytes
01/02/2020 22:32:32	010220.GACT	/SFD_PERTST_EXTSFDF_WEB003/Inbox	15040 bytes
01/02/2020 21:14:57	010220.FISA	/SFD_PERTST_EXTSFDF_WEB003/Inbox	1004 bytes
01/02/2020 21:32:20	010220.GTDE	/SFD_PERTST_EXTSFDF_WEB003/Inbox	2504 bytes
01/06/2020 21:20:36	010620.FISA	/SFD_PERTST_EXTSFDF_WEB003/Inbox	1004 bytes
01/06/2020 22:28:51	010620.GCUS	/SFD_PERTST_EXTSFDF_WEB003/Inbox	1504 bytes

## 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.

The files available for download displays in a grid. For each file, the following information displays as column headers:

- **Received:** Displays the date and time when you received the file for download.
- **File Name:** Displays the actual file name of the download.
- **Mailbox:** Displays the mailbox name.
- **File Size:** Displays the file size.

## 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	120117.4EJN	/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 a required 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 on page 4.