60x30TX

Texas Higher Education Coordinating Board

MOVEit dmz

User Guide

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Texas Higher Education Coordinating Board

**Student Financial Aid Programs**

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Introduction

MOVEit DMZ is a new file transfer protocol system that safely and securely collects, stores, manages, and distributes sensitive information between institutions and the Texas Higher Education Coordinating Board (THECB).

Reports that will be transmitted using MOVEit are the **Award History File** for Towards EXcellence, Access, and Success (TEXAS) Grant, Texas Educational Opportunity Grant (TEOG), Tuition Equalization Grant (TEG), and **Financial Aid Database** (FAD).

In addition, the following files and loan reports will also be transmitted using MOVEit: Loan Disbursement Rosters, School Certification Request files, Update Transaction Response files, Send Response files, Disbursement Roster files, Monthly Loan Hold/Release Rosters, and Monthly Loan Hold Rosters.

The built-in web interface provides access to anyone with a desktop web browser to submit files securely. Also available through the web interface, the optional MOVEit Upload/Download Wizard provides faster and more reliable file transfers using the web. The MOVEit Wizard is also the only browser-based client that supports file integrity checking. A secure FTP interface is also available on the MOVEit DMZ server for people or programs with secure FTP clients.
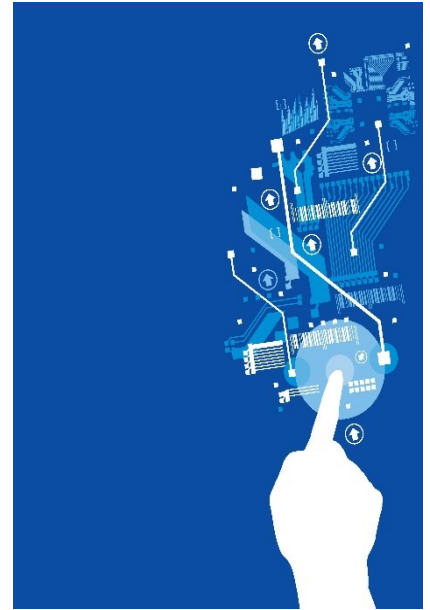
Here are some topics to consider to ensure the best experience with the MOVEit DMZ portal:

- **Internet Explorer Version 9** and above is the preferred browser when using the MOVEit application for uploading file(s).

- **Filezilla** is still an available option to use for uploading files. If the browser does not work with installation of the MOVEit upload/download wizard, instiutions may still use Filezilla.

- **Upload/Download Wizard** helps transfer files faster and more efficiently but is NOT required. In order to use the Wizard function, instiutions must install it first. Installation instructions can be found on page 4.

- **Verify** that thier PC has the ability to do installations and is not in a lockdown environment due to the installation of the Upload/Download Wizard.

Getting Started

Logging in to MOVEit DMZ

Go to the MOVEit DMZ login portal at https://dsv.thecb.state.tx.us/. Enter thier MOVEit account username and password, then click on the green **Sign On** button.

- The username and password will be provided to the designated individual at thier institution.
- Similar to the previous SFTP login process, only one ID and password will be issued to an institution.
- The option to change thier password is available. Due to security protocols, an automated password reset process is not available. If instiutions forget thier password or ID, send a website inquiry through CONTACT US (select "Financial Aid Question" as the Contact Reason).
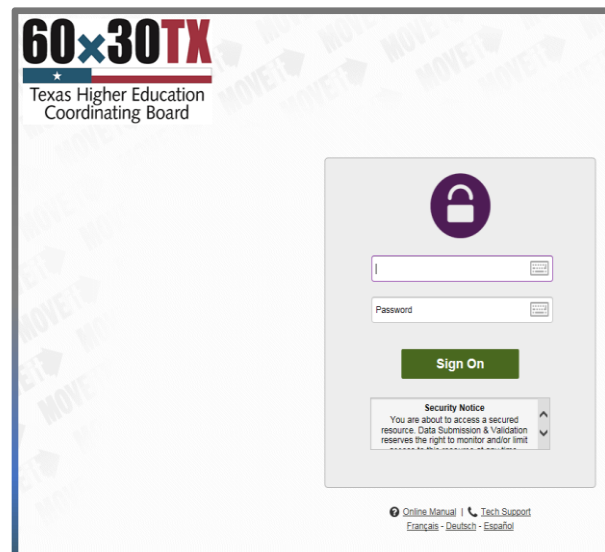
Wizard or No Wizard?

## Users can access the MOVEit DMZ portal without having to install the wizard.

Once logged in, instiutions will see the following options that allow the use of a Wizard or to manually move files. Users with administrative rights to their computers can install the **Upload/Download Wizard**.

Instiutions can choose to disable the Wizard or Disable for this session only. Once disabled, instiutions can later download the wizard from **My Account.** If the wizard is disabled **for this session only**, then the option to download the Wizadrd will appear the next time an instiutions log-in to MOVEit DMZ.
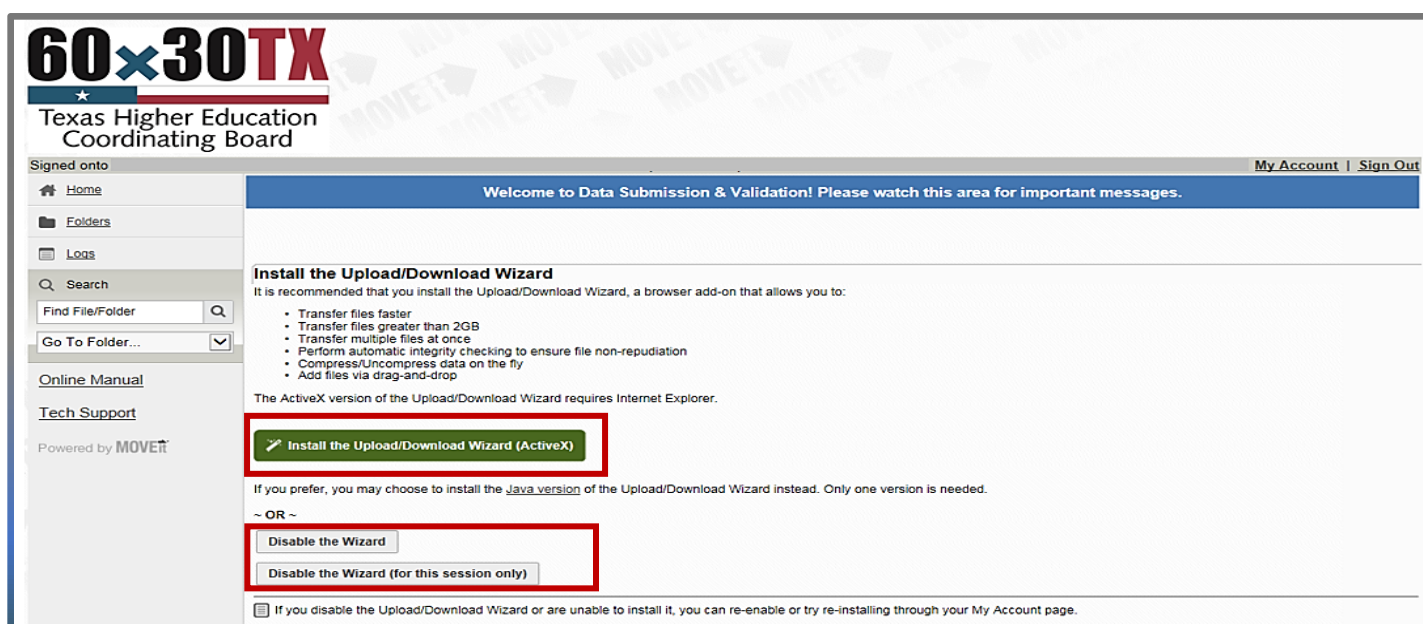
Installing the Upload/Download Wizard

The **Upload/Download Wizard** is available under "My Account".
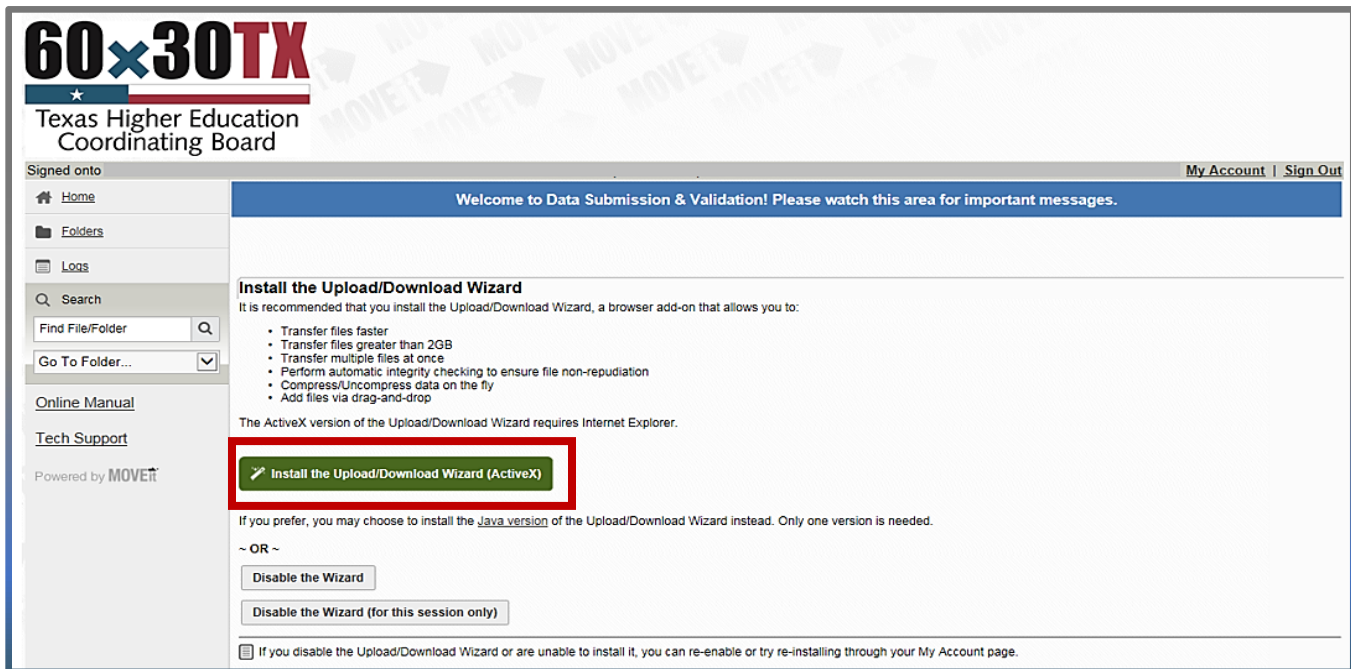
The Upload/Download Wizard is a useful browser add-on tool that helps institutions transfer files faster and more efficiently. It is recommended that institutions install the Wizard. The benefits include:

- No maximum size (files larger than 2 gigabytes are allowed)
- Faster uploads due to compression on the fly (ActiveX only)
- Option to send multiple files in single transfer session

Step 1. Click **Install the Upload/Download Wizard (ActiveX).**
Step 2. Click **OK**, then follow the prompts.
Step 3. Once the MOVEit Download Wizard displays "Transfer Complete", click the **Close** button.
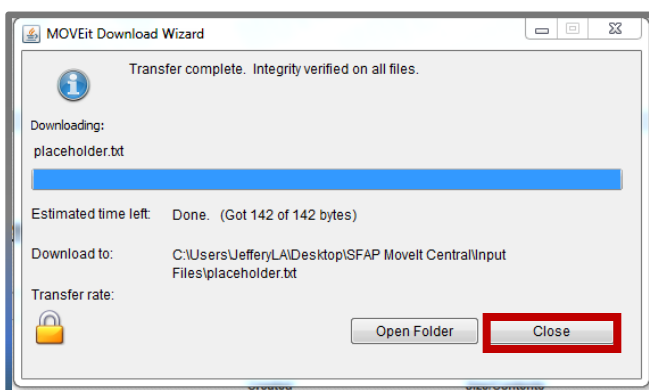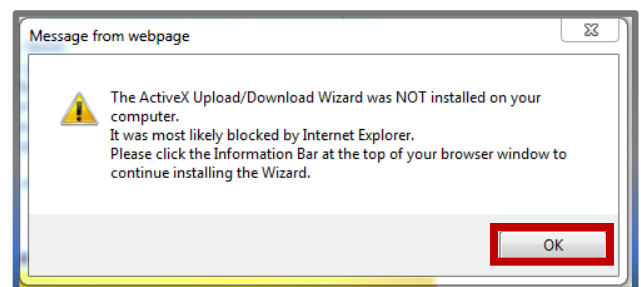
# How to use the MOVEit DMZ website portal

Navigating the Home page

MOVEit DMZ is intended to be user-friendly, as the web interface was designed with the end-user in mind.

My Account allows institutions to change their password, change the language, edit their package delivery options, and install or disable the Upload/Download Wizard.

Sign Out lets institutions sign out of the web portal.
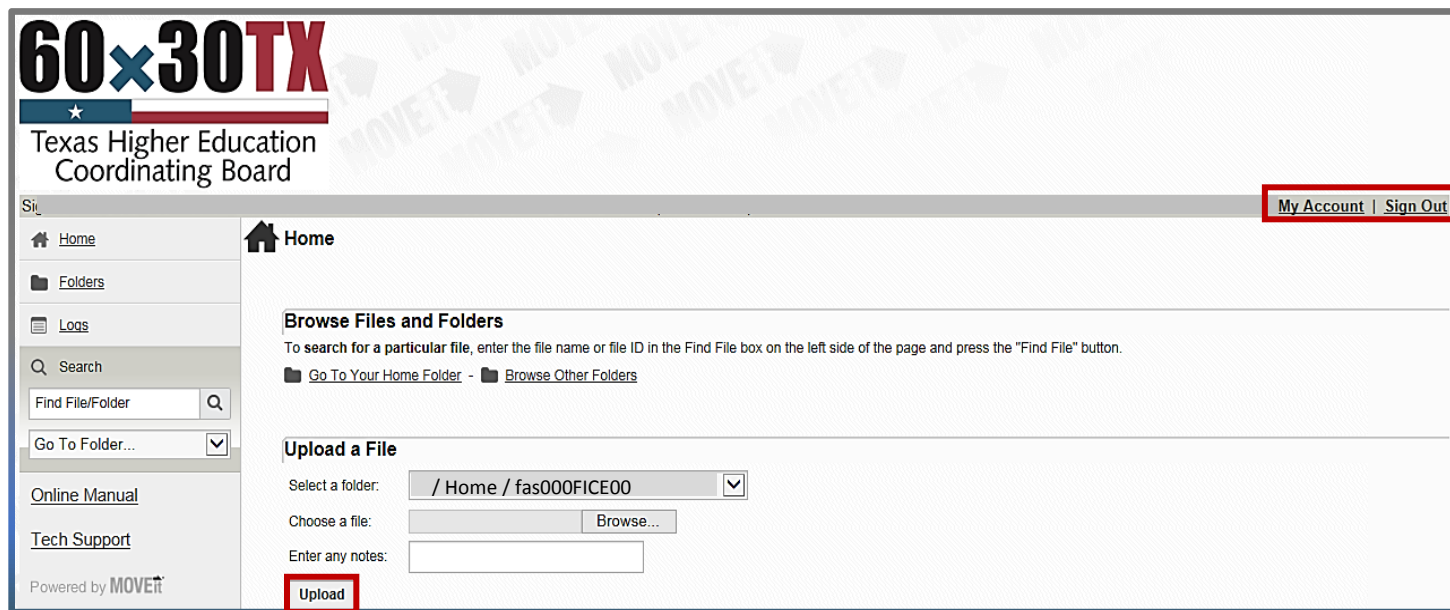
Upload allows users to submit files to a designated program folder right from the Home Page.
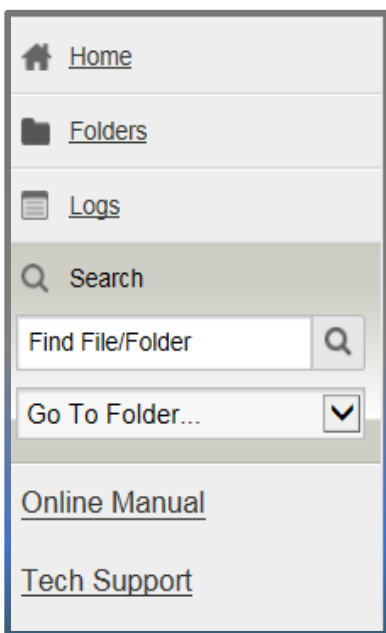
The left margin navigation bar is always visible throughout the interface.

- The **Home** icon will take instiutions back to the home page.
- The **Folders** icon grants the user access to program folders.
- The **Logs** icon allows users to select multiple filtering options to search for files (Date, Action, File, Size, Folder, Agent Brand, and Success/Failure).
  Hint: Filter using today's date (default) if instiutions just uploaded the file.
- The **Search** section gives the user two options:
  - Find a file by **File Name / Folder** or
  - Navigate directly to a program folder using the drop down option **Go To Folder.**
- **Online Manual** is a resource that provides users with detailed instructions that can help answer questions.
- **Tech Support** offers contact information for designated staff at the THECB who can assist instiutions with technical issues.

Uploading files

Step 1. When **uploading a file**, always verify that the following folder is displayed: */ Home / fas000FICE00*

Step 2. Click the **Browse** button to choose a file from the local computer.

Step 3. Click the **Upload** button to transmit the file to the THECB securely and accurately.

Files accepted for **uploading**:

- ✓ End-of-Year
- ✓ Summer Updates
- ✓ Award History
- ✓ FADS
- ✓ Loan Certification

The following folders below cannot be used for UPLOADS:

/ Home / fas000FICE00 / Grant_Output
/ Home / fas000FICE00 / Grant_Output / TEG
/ Home / fas000FICE00 / Grant_Output / TEOG
/ Home / fas000FICE00 / Grant_Output / TEXASGrant
/ Home / fas000FICE00 / Grant_Output / Top10
/ Home / fas000FICE00 / Loans_Output
/ Home / fas000FICE00 / FADS_Output

Locating output files for download

All output files (e.g. Error Report, Reconciliation Report, School Certification Request, Update Transaction Response, Send Response, Disbursement Roster, Award History Results, etc.) can be found by searching the designated program folder.

The fastest way to locate a folder is by using the **Go To Folder** drop-down and choosing the appropriate program folder.
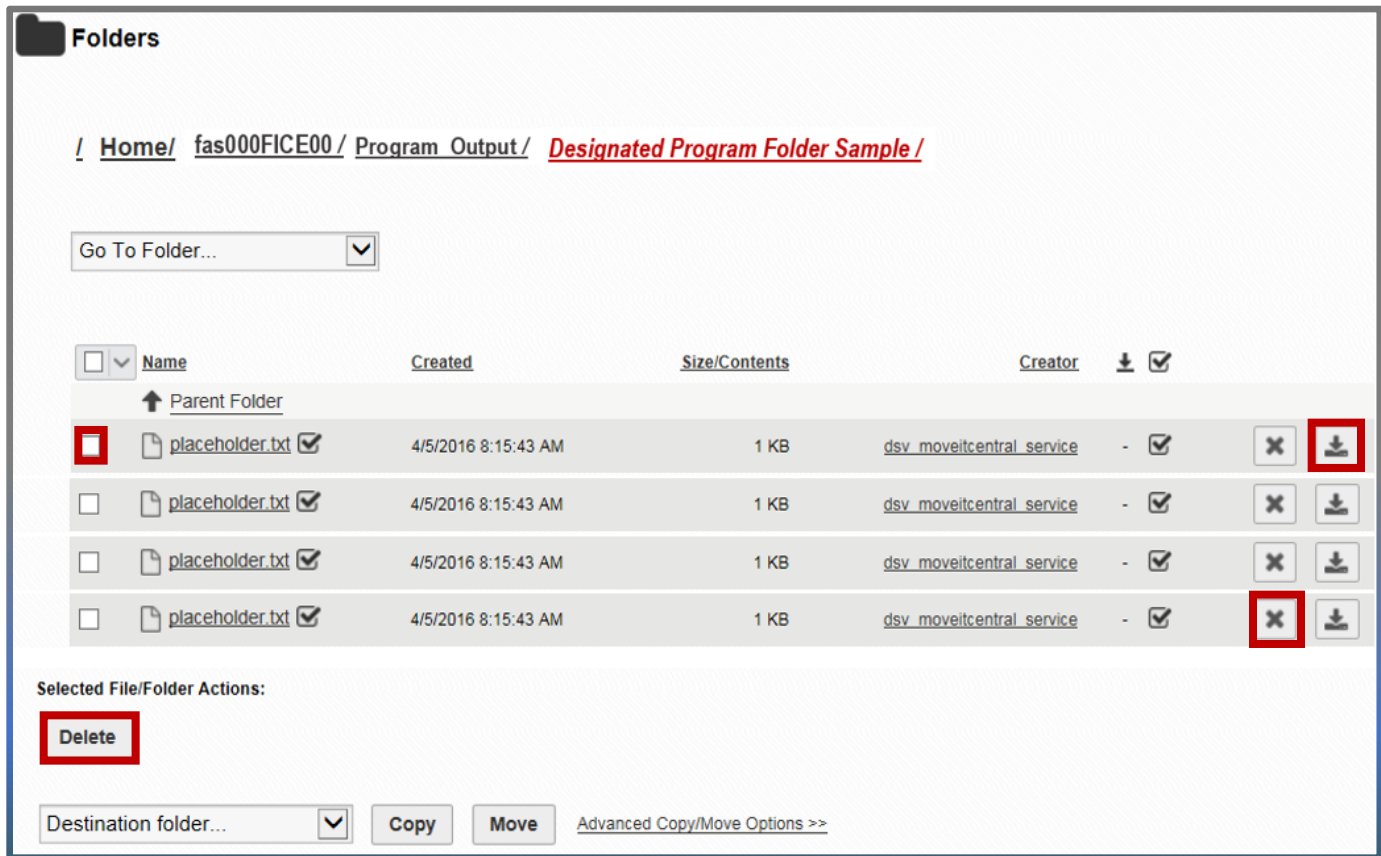
Click on the **Go To Folder** drop-down arrow and select the folder that contains the information institutions are looking for. Examples include:

- o   / Home / fas000FICE00 / Grant_Output / TEG
    - TEG End-of-Year Error Report
    - TEG Award History

- o   / Home / fas000FICE00 / Grant_Output / TEOG
    - TEOG End-of-Year Error Report
    - TEOG Award History

- o   / Home / fas000FICE00 / Grant_Output / TEXASGrant
    - TEXAS Grant End-of-Year Error Report
    - TEXAS Grant Award History

- o   / Home / fas000FICE00 / Grant_Output / Top10
    - Top10 End-of-Year Error Report
    - Top10 Award History

- o   / Home / fas000FICE00 / Loan_Output
    - Disbursement Roster - Text & CommonLine Files
    - School Certification Request CommonLine Files
    - Update Transaction Response CommonLine Files
    - Send Response CommonLine Files

- o   / Home / fas000FICE00 / FADS_Output
    - FADS Error reports
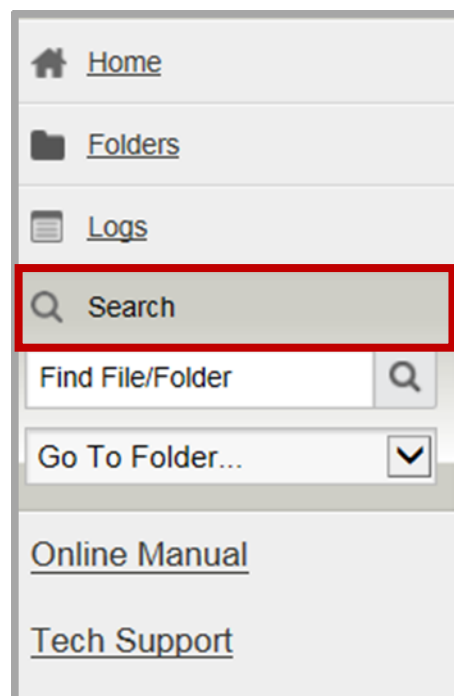
Managing the program folder

Downloading: Designated program folders will maintain files for up to *30 days.* Files will automatically be deleted after this time has lapsed. Once institutions have accessed the appropriate program folder, institutions can download a specific file by clicking the **download icon**.

Deleting: Institutions can delete a file simply by selecting the checkbox next to the file and clicking the **Delete** button or the **X** icon next to the download icon. Institutions will be asked to confirm their request before the file(s) are deleted.

Need Help?

To reset their password, update the institution's generic email box, or for additional technical support, send a website inquiry through CONTACT US (select "Financial Aid Question" as the Contact Reason).