Rocket

TRUexchange

User's Guide

Version 5.2.3

August 2022
TEX-523-UG-01

Notices

Edition

Publication date: August 2022
Book number: TEX-523-UG-01
Product version: Version 5.2.3

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License agreement

Corporate information

Rocket Software, Inc. develops enterprise infrastructure products in four key areas: storage, networks, and compliance; database servers and tools; business information and analytics; and application development, integration, and modernization.

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To contact Rocket Software by telephone for any reason, including obtaining pre-sales information and technical support, use one of the following telephone numbers.

Country	Toll-free telephone number
United States	1-855-577-4323
Australia	1-800-823-405
Belgium	0800-266-65
Canada	1-855-577-4323
China	400-120-9242
France	08-05-08-05-62
Germany	0800-180-0882
Italy	800-878-295
Japan	0800-170-5464
Netherlands	0-800-022-2961
New Zealand	0800-003210
South Africa	0-800-980-818
United Kingdom	0800-520-0439

Contacting Technical Support

The Rocket Community is the primary method of obtaining support. If you have current support and maintenance agreements with Rocket Software, you can access the Rocket Community and report a problem, download an update, or read answers to FAQs. To log in to the Rocket Community or to request a Rocket Community account, go to www.rocketsoftware.com/support.

In addition to using the Rocket Community to obtain support, you can use one of the telephone numbers that are listed above or send an email to support@rocketsoftware.com.

Contents

Chapter 1: Welcome to Rocket TRUexchange

TRUexchange provides a convenient and user-friendly way to send files to and receive files from other members of your community.

Overview of available TRUexchange clients

To use TRUexchange, you can use one of following clients, depending on your operating system and browser configuration, and security considerations.

TRUexchange Web Client (without the use of Java)

This is the default client for new users of TRUexchange. If you do not want to use Java, you can install TRUexchange Web Client. The TRUexchange Web Client is supported on Microsoft Windows versions 8 and later. It is not supported on Mac computers.

Setting up TRUexchange Web Client, on page 20

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TRUexchange Desktop Client

You can use TRUexchange Desktop Client instead of the web client, by installing the client on your computer and running it. The TRUexchange Desktop Client is supported only on Microsoft Windows. For more information, see *TRUexchange Desktop User's Guide*.

TRUexchange Web Client (using Open Web Launch)

If your browser does not support applets and you use Java 11 or later, you can install the Open Web Launch extension for your browser and then connect to TRUexchange website. Open Web Launch is not supported on Mac computers.

Setting up Open Web Launch, on page 16

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TRUexchange Web Client (using Java Web Start)

If your browser does not support applets and you use a Java version earlier than 11, you can use Java Web Start to connect to the TRUexchange website from one of the following browsers:

- Google Chrome version 42 or later
- Mozilla Firefox version 52 or later
- Microsoft Edge

Note: Java Web Start was removed in Java 11.

Configuring Windows computers, on page 9

Configuring Mac computers, on page 14

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Java applets

If you use one of the following browsers that still support applets, you can connect to the TRUexchange website from your browser using Java applets.

- Google Chrome version before 42

- Mozilla Firefox version before 52

- Mozilla Firefox ESR version 52 or later

Note: Oracle deprecated applets in Java SE 9.

Warning: Make sure that the following URLs, IP addresses, and ports are allowed in your proxy and firewall. Contact your IT team for more details.

URL	IP address	Port
b2bi.rocketsoftware.com	137.134.42.55	443
tpalite.rocketsoftware.com	137.134.42.54	443
tpalite.rocketsoftware.com	137.134.42.54	9005 (UDP Port)
tpalite-ms.rocketsoftware.com	137.134.42.53	443

TRUexchange usage workflow

To use TRUexchange, you only need to complete the following simple steps:

1. Depending on the client you chose, verify the system, web browser, and software requirements.
2. Configure your computer, Java, and browser if needed.
3. Log in to TRUexchange using the link, ID, and password your administrator sent you by email, and create your encryption key.
4. Edit the profile your administrator created on your behalf.
5. Create your contact list by selecting contacts from the list of available (global) contacts.
6. Send files to or receive files from contacts on your list.

Chapter 2: Software requirements

TRUexchange requires the following software.

Microsoft Windows

Operating system

Windows Vista or later.

Browser

Microsoft Internet Explorer 7 or later, Mozilla Firefox 3 until 52, Firefox ESR or later.

Java

(32-bit) Version 1.6.0_03 or later.

UNIX systems

Operating system

Sun

Solaris 10 or later

Mac

macOS X 10.7.x or later

Linux

Ubuntu / CentOS

HP-UX

B.11.11 or later

Browser

Safari, Mozilla Firefox 3 until 52, Firefox ESR or later..

Java

(32-bit) Version 1.6.0_03 or later.

Java Web Start and Java Applet

Java Web Start (JWS) is now an alternative to the original Java Applet.

TRUexchange continues to support the following browsers with the original Java Applet:

- Google Chrome before version 42
- Mozilla Firefox before version 52
- Mozilla Firefox ESR version 52 or later

TRUexchange supports these browsers with JWS as an alternative to the Java Applet:

- Google Chrome version 42 or later
- Mozilla Firefox version 52 or later
- Microsoft Edge

Chapter 3: Configuring your system to use TRUexchange

Configuring Windows computers

Configuring Java

Important: You need to configure Java only if you are using the following:

- TRUexchange Web Client (using Open Web Launch)
- TRUexchange Web Client (using Java Web Start)

You need not configure Java if you are using the following:

- TRUexchange Web Client (without the use of Java)
- TRUexchange Desktop Client

You must install 32-bit Java version 1.6.0_03 or later. TRUexchange will not run with 64-bit Java.

Procedure

1. From the control panel, select **Java (32-bit)** to display the **Java Control Panel**.
2. Click the **About** button to view the version number. Verify that you are using version 1.6.0_03 or later.
3. Close the **About Java** window.
4. Click the **Security** tab.
5. Click the **Edit site list** button to display the exception list.
6. Click the **Add** button and enter `https://b2bi.rocketsoftware.com` into the new entry.

7. Click **OK** to save the exception list.
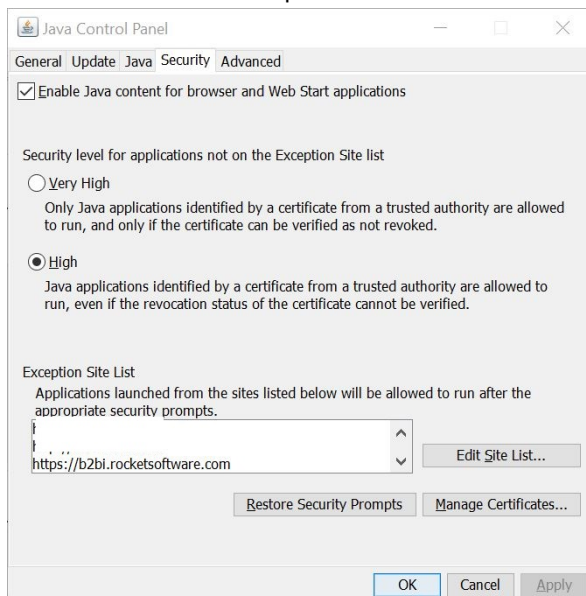
8. Click the **General** tab and select **Settings** → **Delete files**.

9. Select only the **Trace and Log Files** and **Cached Application and Applets** check boxes, then click **OK**.
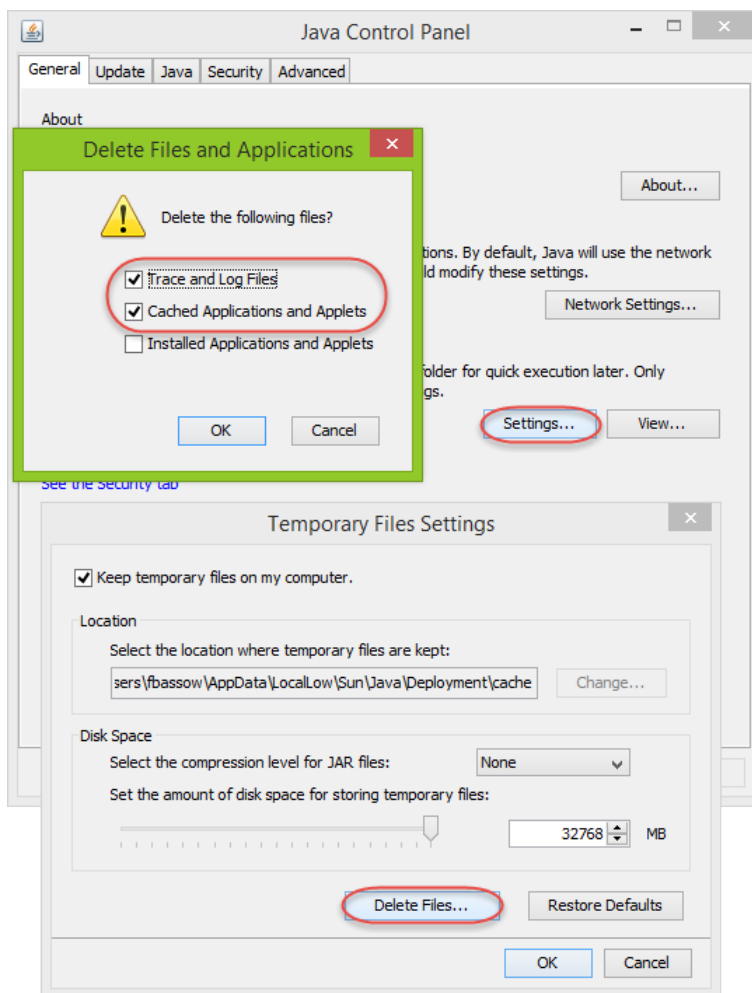
10. Click the **Advanced** tab and look for the **Java Plug-in** setting. If it exists, make sure the **Enable the Next Generation Java Plug-in** check box is cleared.

11. Click **OK**.

Next topic: Configuring Internet Explorer
Parent topic: Configuring Windows computers

Configuring Internet Explorer

Procedure

1. In Internet Explorer, select **Tools** → **Internet options** → **Security** → **Trusted sites** → **Sites**.
2. Enter `https://b2bi.rocketsoftware.com` in the input field and click the **Add** button.
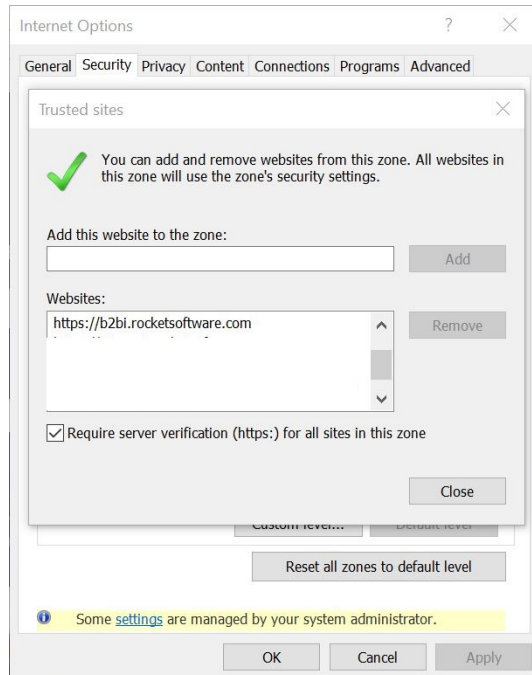
3. Click **Close**, then click **OK** to save the options.
4. Select **Tools** → **Compatibility View settings**.

5. Enter `rocketsoftware.com` in the input field and click the **Add** button.
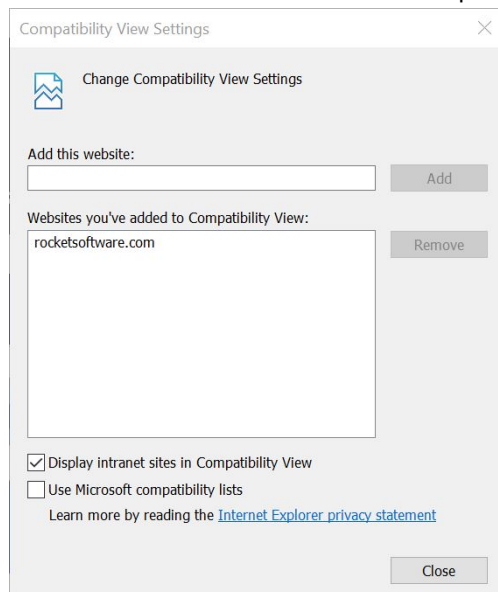
6. Click **Close** to save the settings.

7. If the web site is not responding or will not let you login, try clearing the temporary internet files and cookies:

   a. Select **Tools** → **Internet options** → **Delete**.

   b. Select only the **Temporary Internet files** and **Cookies** check boxes.
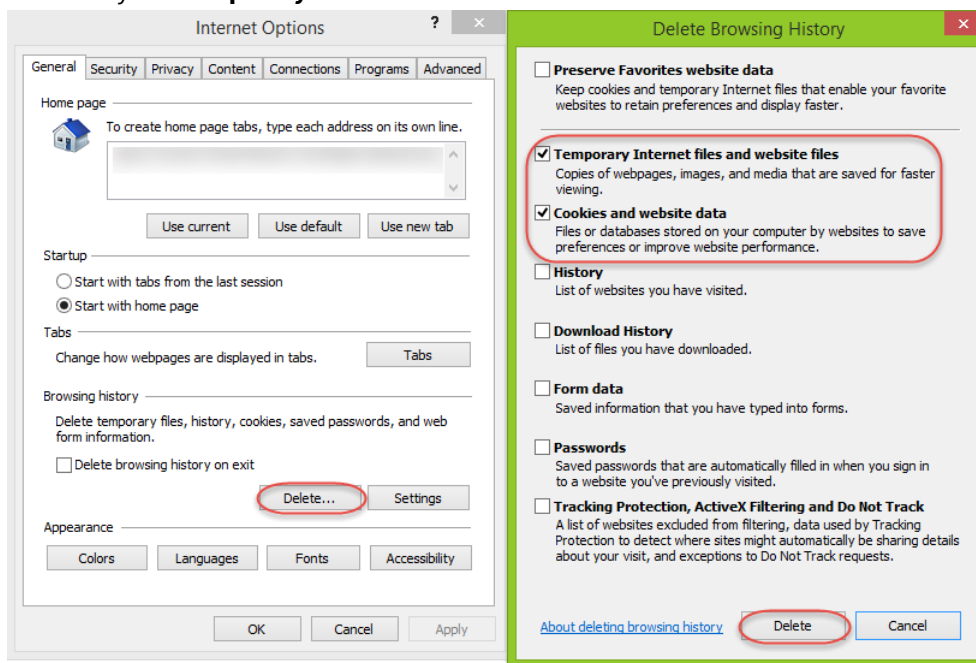
   c. Click the **Delete** button.

Next topic: Configuring Firefox
Previous topic: Configuring Java
Parent topic: Configuring Windows computers

Configuring Firefox

Procedure

1. Select **Tools → Add-ons → Plug-ins**
2. Make sure both the Java Deployment Toolkit and the Java Platform plug-ins are activated.
3. If the web site is not responding or will not let you login, try clearing the browser history:
   a. Select **History → Clear Recent History**.
   b. Select only the **Cookies** and **Cache** check boxes.
   c. Click the **Clear Now** button.
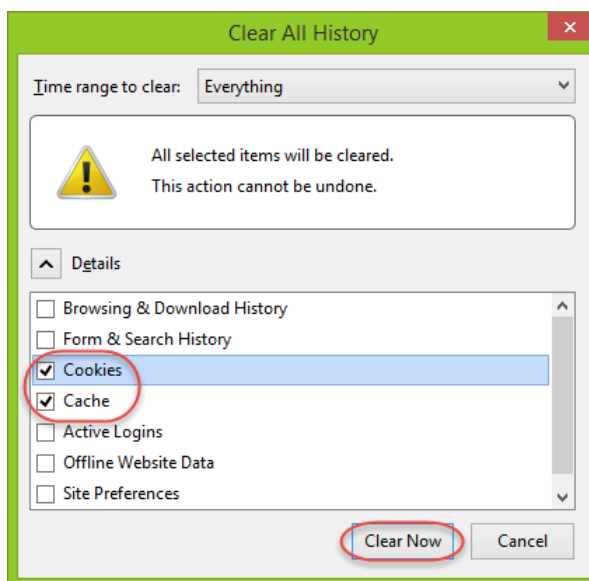
Next topic: Configuring user account control
Previous topic: Configuring Internet Explorer
Parent topic: Configuring Windows computers

Configuring user account control

If you cannot view the files you have downloaded using TRUexchange, you might need to adjust your Windows **User Accounts** settings.

Procedure

1. Select **Start → Control Panel → User Accounts → Change User Account Control settings**.

2. In the **User Account Control Settings** window, move the slider down to **Never notify**.
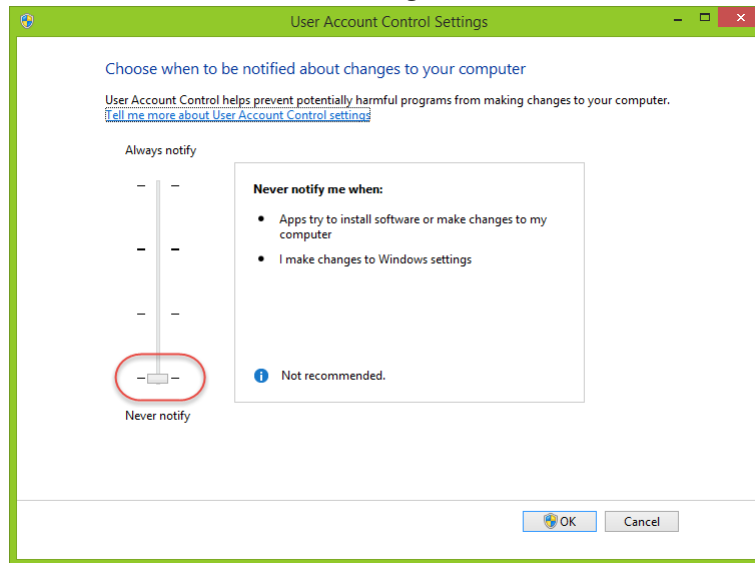
3. If a notification pop-up window displays, click the **Yes** button.

Previous topic: Configuring Firefox
Parent topic: Configuring Windows computers

Configuring Mac computers

1. Configuring Java
2. Configuring Safari

Configuring Java

Procedure

1. From the System Preferences, select **Java** to display the **Java Control Panel**.
2. Click the **Security** tab.
3. Click the **Edit site list** button to display the exception list.

4. Click the **Add** button and enter `https://b2bi.rocketsoftware.com` into the new entry.
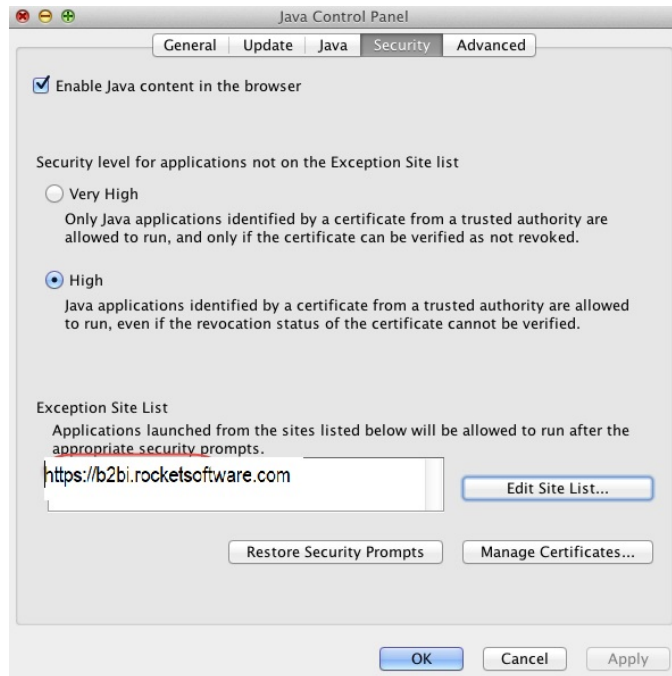
5. Click **OK** to save the exception list.

6. Click the **General** tab and select **Settings → Delete files**.

7. Select only the **Trace and Log Files** and **Cached Application and Applets** check boxes, then click **OK**.
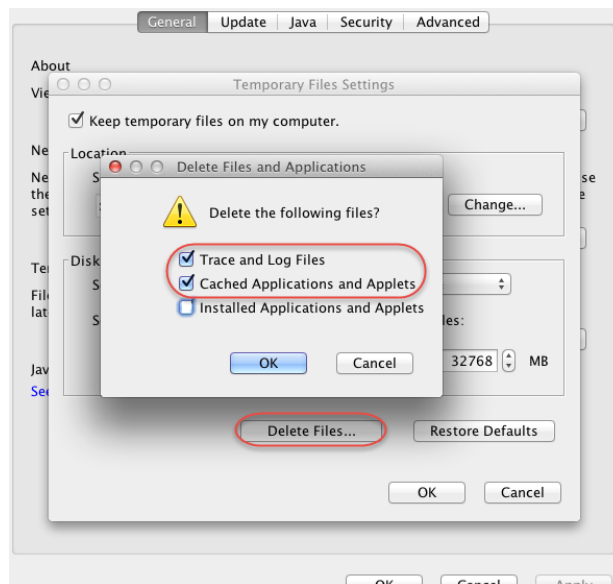
8. Click **OK**.

Next topic: Configuring Safari
Parent topic: Configuring Mac computers

Configuring Safari

If the TRUexchange web site does not run Java in the Safari browser, configure the Java plug-in using this procedure.

Procedure

1. In the Safari browser, navigate to the TRUexchange web site.
2. Select **Preferences** → **Security** → **Manage Website Settings**.
3. Select the Java plug-in and make sure the value for `b2bi.rocketsoftware.com` is set to **Allow Always**.
4. Click **Done** to save the settings.

Previous topic: Configuring Java
Parent topic: Configuring Mac computers

Setting up Open Web Launch

Your browser may not support the use of Java Applets.

This prevents you from uploading and downloading Rocket TRUexchange files using your browser.

However, you can use the new Open Web Launch feature instead.

Open Web Launch is not supported by Mac computers.

You can download and install Open Web Launch extension and Open Web Launch desktop application from the links given in the procedure.

To install and configure the Open Web Launch application, you need to have Java installed on your machine. You can download the latest OpenJDK from https://jdk.java.net/archive/.

1. Install the Open Web Launch extension for your browser.

   - Chrome: Install Open Web Launch extension from https://chrome.google.com/webstore/detail/open-web-launch/pmmlhpkdpbddohdbnjinopbkmlcnjnhc

   - Firefox: Install Open Web Launch extension from https://addons.mozilla.org/en-US/firefox/addon/open-web-launch/.

   - Other Browsers: For all other browsers, download the Open Web Launch application from https://github.com/RocketSoftware/open-web-launch/releases.

2. After downloading the installer, run it to open the installation wizard.
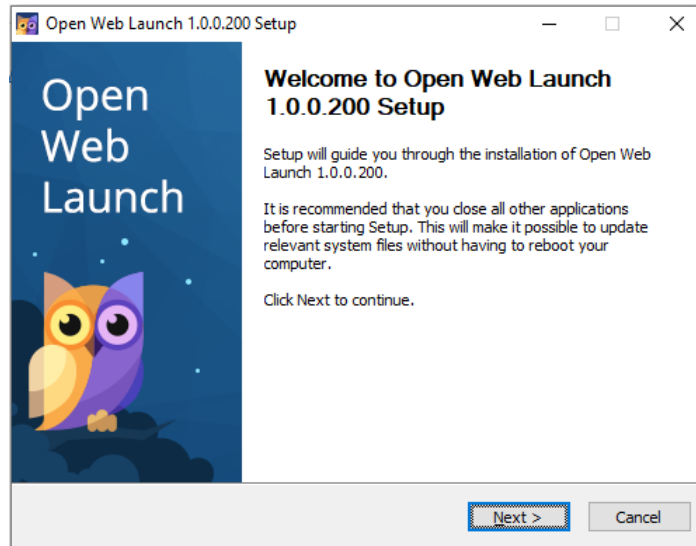
3. Click **Next**.

4. In the **License Agreement** dialogue, click **I Agree**.
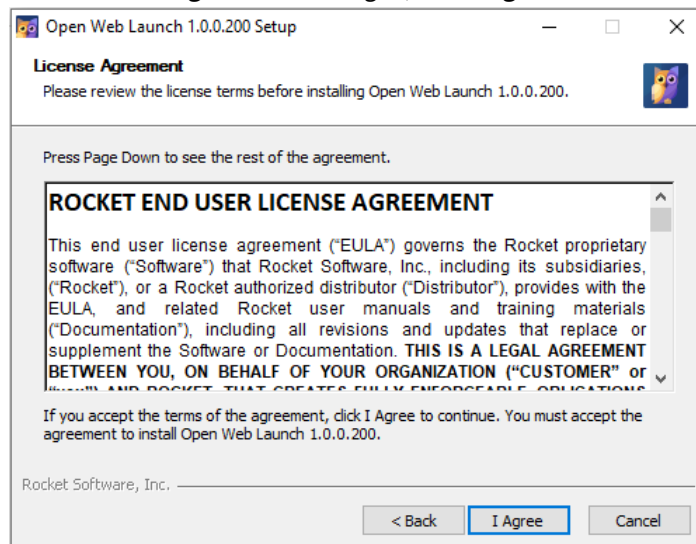
5. In the **Choose Install Location** dialogue, Choose the folder in which to install Open Web Launch or click **Next** to install on the standard path.
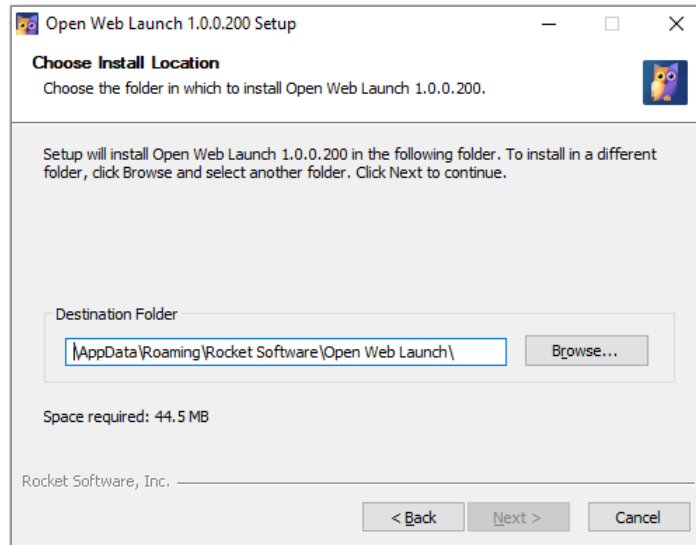
6. In the **Choose Components** dialogue, select **Browser Extensions**, then click **Next**.
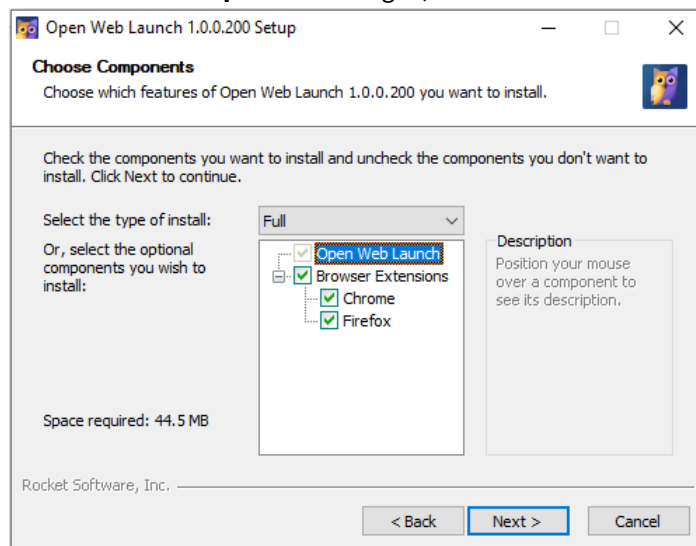
7. In the **Configuration** dialogue, leave all of the options checked. Click **Next**.
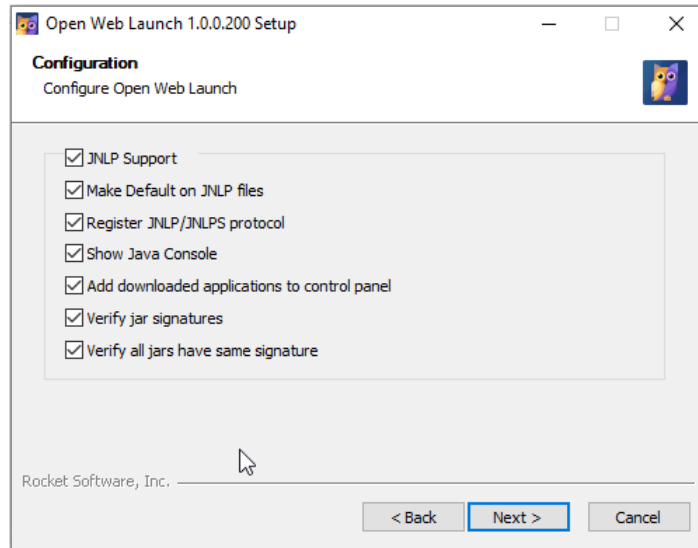
8. In the **Specify Java Location** dialogue, specify the location where Java is installed or select **Use registry settings to determine Java version**.
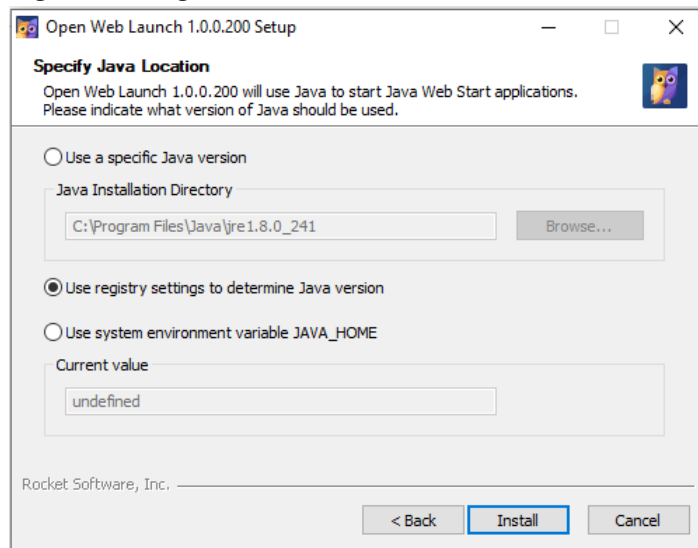
9. Open Web Launch will be installed. In the **Installation Complete** dialogue, click **Next**.
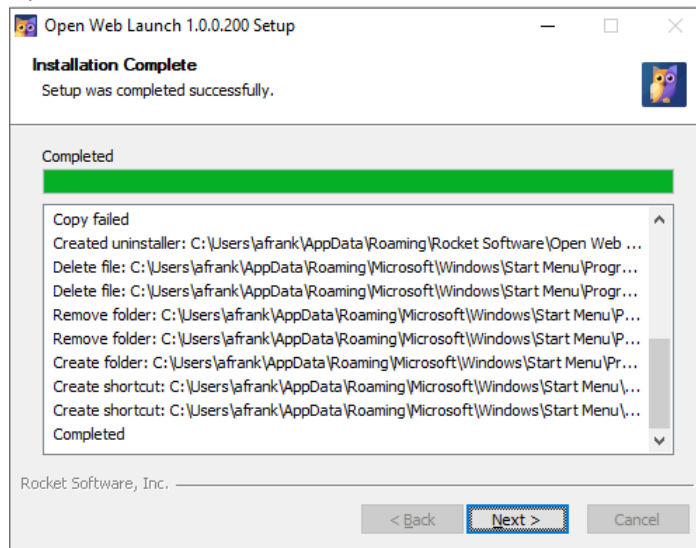
10. Click **Finish**.

The installation is complete.
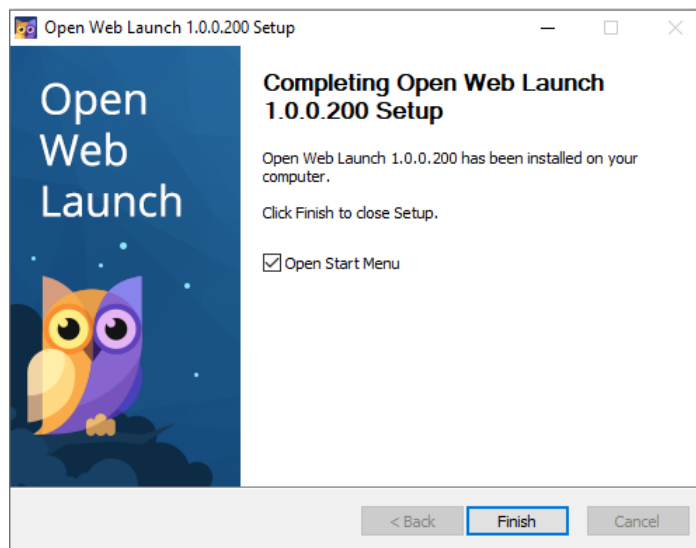
Setting up TRUexchange Web Client

If you are an existing TRUexchange user, you can continue to use the current Java clients. If you do not want to use Java, you can install the new TRUexchange Web Client.

If you are a new user, you need to use the TRUexchange Web Client.

Rocket Support users can revert you to the use of Java clients upon your request.

Note:

- The TRUexchange Web Client is supported on Microsoft Windows versions 8 and later. It is not supported on Mac computers.
- When the TRUexchange Web Client starts, it checks for updates. If a new version of the client is available on the TRUexchange server, the client will be updated before startup.

Online installation of TRUexchange Web Client

1. Click the **Click here to install** link on the **Inbox** page.
2. On the warning pop-up, click **Continue**.
3. If a security warning dialog is displayed, verify that Rocket Software, Inc., is the publisher, and click **Install**.
4. On the success message pop-up, click **OK**.
5. On the **Internet Settings** page, click **OK**. See for instructions on how to configure the client.

In the Windows **Start** menu, **Rocket TRUexchange Web** folder is displayed.

Stand-alone installation of TRUexchange Web Client

If you cannot install the TRUexchange Web Client online, you can download stand-alone installation package as a ZIP file and then install it locally.

1. On the **Inbox** page, click the link to download the ZIP installation package.
2. On the warning pop-up, click **Continue**.
3. Download the ZIP installer and extract the files.
4. Double click `RocketTRUexchangeWebClientSetup.exe` to start the installation.
5. If a security warning dialog is displayed, verify that Rocket Software, Inc., is the publisher, and click **Install**.
6. On the success message pop-up, click **OK**.
7. On the **Internet Settings** page, click **OK**. See for instructions on how to configure the client.

In the Windows **Start** menu, **Rocket TRUexchange Web** folder is displayed.

Configuring TRUexchange Web Client

1. From the Windows **Start** menu, expand the **Rocket TRUexchange Web** folder and click **Configure TRUexchange Web Client**.
2. On the **Internet Settings** page, select one of the following options:
   - To use the internet settings from your index browser, select the **Use Browser Settings** check box.
   - To use an automatic configuration script, select the **Use Automatic Configuration Script** check box and fill in the appropriate fields.
   - To use a proxy server, select the **Use Proxy Server** check box and fill in the appropriate fields.

Note: To configure proxy authentication, you can find the required settings from your Windows Internet Settings or from your IT administrator.

Warning: Make sure that the following URLs, IP addresses, and ports are allowed in your proxy and firewall. Contact your IT team for more details.

URL	IP address	Port
b2bi.rocketsoftware.com	137.134.42.55	443
tpalite.rocketsoftware.com	137.134.42.54	443
tpalite.rocketsoftware.com	137.134.42.54	9005 (UDP Port)
tpalite-ms.rocketsoftware.com	137.134.42.53	443

3. Specify the desired communication protocol in the **Protocol** drop-down field. Select **Auto** to let the application use the fastest available protocol (recommended).
4. Click **OK** to complete the configuration.

Uninstalling the TRUexchange Web Client

1. From the Windows **Start** menu, expand the **Rocket TRUexchange Web** folder and click **Uninstall TRUexchange Web Client**.
2. On the confirmation pop-up, click **Yes**.

Chapter 4: Using TRUexchange

Login Page

Existing Users

Note: Passwords are case sensitive.

Retrieving a forgotten username

1. Click **Forgot Username**.
2. Follow the instructions on the screen to retrieve your username.

Retrieving a forgotten password

1. Click **Forgot Password**.
2. Follow the instructions on the screen to reset your password.

New Users

If you are a new user and want to register, click the **Subscribe** button.

If you know the community that you are interested in joining, click the **Subscribe Now** button under that community name.

Helpful Information

To view help on how to use the website and the FAQ, click the **Helpful Information** button.

Support

If you are looking to contact our support team regarding any issue, you can do so by calling the phone numbers or by using the support link.

Logging in for the first time

Once the Rocket Support team approves your registration, you receive a confirmation email with your user ID and a link to your login page.

Procedure

1. Open the email sent by Rocket Support.
2. Click the link to the login page.
3. Log in using the user ID and password you have been given.
4. Click the **I Agree** button for the Terms of Use. If you did not subscribe to a community when registering, do that now.

If the Rocket Support administrator has enabled multi-factor authentication (MFA) for the application and you want to use MFA for enhanced security, you can configure MFA at this time. If the Rocket Support user has enabled MFA for the community for your account, you are required to configure MFA.

See [Multi-factor authentication, on page 24](#) and [Configuring multi-factor authentication, on page 24](#) for more information.

> **Note:** You can manage the MFA in the **Security** section of your **User Settings** page at any time later.

Multi-factor authentication

Multi-factor authentication (MFA) is an additional layer of security for your account, in addition to the first-level authentication using user name and password.

MFA can be enabled at three levels:

- **Application level:** Only the Rocket Support administrator can enable or disable MFA at the application level. By default, MFA is enabled. If MFA is enabled at the application level, community owners and users cannot disable it.

- **Community level:** Rocket Support users can enable MFA for community members based on requests from community administrators. If MFA is enabled at the community level, community users are required to configure the MFA for their accounts.

- **User level:** If MFA is enabled at the application level, users can choose to configure MFA or cancel MFA for their accounts. If MFA is enabled at the community level, users must configure MFA for their accounts.

See [Configuring multi-factor authentication, on page 24](#) for more information.

Configuring multi-factor authentication

After you log in using your user name and password, you can configure multi-factor authentication (MFA):

- If the Rocket Support administrator has enabled MFA at the application level, you can configure MFA.

- If your community administrator has enabled MFA for community users, you are required to configure MFA.

If the Rocket Support administrator did not enable MFA for the application, you are not required to configure MFA.

1. On the **Configure multi-factor authentication** pop-up, click **Configure MFA**.
2. On the **Configure multi-factor authentication** pop-up, configure at least two types of MFA, as described in the following topics:

   - [Configuring MFA using one-time password, on page 25](#)
   - [Configuring MFA using security questions, on page 25](#)
   - [Configuring MFA using code from Authenticator App, on page 25](#)

   Out of the MFA methods you configure, you can choose one to be your default MFA method. The other methods will be your backup MFA methods in case you are not able to authenticate using the default MFA.

   > **Note:** Initially, the first MFA method that you configure is selected as the default MFA method. After you set up at least two MFA methods, you can change the default MFA method.

Configuring MFA using one-time password

1. On the **Configure multi-factor authentication** wizard, click **Set up** on the **Email one-time password (OTP)** row.

2. Enter the OTP that you received by email, and click **Verify**. If you did not get a OTP, click **Ask for new code** and get it verified.

3. On the `Success` message pop-up, click **OK**.

   You are redirected to the **Configure multi-factor authentication** wizard, where you can set up other MFA types.

Configuring MFA using security questions

1. On the **Configure multi-factor authentication** pop-up, click **Set up** on the **Security questions** row.

2. Choose three security questions and your answers to those questions and click **Next**. MFA will be based on the answer to a random security question.

3. Under **Answer Security Question**, enter the answer to the security question and click **Verify**.

4. On the `Success` message pop-up, click **OK**.

   You are redirected to the **Configure multi-factor authentication** wizard, where you can set up other MFA types.

Configuring MFA using code from Authenticator App

1. On the **Configure multi-factor authentication** wizard, click **Set up** on the **Use code from Authenticator App** row.

   The **Configure multi-factor authentication** wizard displays the QR codes to download Google Authenticator app.

2. Using your mobile phone or tablet (iOS or Android), scan the appropriate QR code for your device.

   You are directed to the Google Play Store or Apple App Store for downloading the Google Authenticator app.

3. Install Google Authenticator on your mobile phone or tablet.

4. Click **Next** on the **Configure multi-factor authentication** wizard.

   The wizard now displays the QR code for your account.

5. Scan the QR code for your account using Google Authenticator. A six-digit code is displayed on the Authenticator app. Click **Next**.

6. On the **Configure multi-factor authentication** wizard, enter the six-digit code shown on Google Authenticator and click **Verify**.

7. On the `Success` message pop-up, click **OK**.

   You are redirected to the **Configure multi-factor authentication** wizard, where you can set up other MFA types.

Selecting your default MFA method

If you have completed setting up two or more MFA types, you can choose your default MFA type. The other MFA types will be your backup options, in case you are not able to authenticate using the default method.

On the **Configure multi-factor authentication** wizard, choose the **Set default** radio button to select your default MFA type, and then click **Submit**.

Your default and backup MFA types are set up and you are logged out.

Authenticating using one-time password

1. After you log in using your user name and password, you are prompted for the OTP.

2. Check your email for a one-time password (OTP) emailed to you by TRUexchange application.

3. If you did not receive the OTP by email, click **Ask for new code** on the **Multi-factor authentication** pop-up. If you received the OTP, enter the OTP and click **Verify**.

   If the OTP is correct, you are logged on to TRUexchange.

Authenticating using security questions

1. After you log in using your user name and password, you are prompted to answer a security question chosen randomly from your list of questions.

2. Under **Answer security question**, enter the answer to the security question and click **Verify**.

   If the answer is correct, you are logged on to TRUexchange.

Authenticating using code from Authenticator App

1. After you log in using your user name and password, you are prompted to enter the time-based code being generated on the Google Authenticator app. A new code is generated every 30 seconds.

2. Under **Enter the 6-digit code you see in the Authenticator app**, enter the six-digit code on your app and click **Verify**.

   If the code is correct, you are logged on to TRUexchange.

Using the backup MFA method

If, due to some reason, you cannot authenticate using the default MFA type, you can try the backup MFA types.

After you log in using your user name and password, the appropriate **Multi-factor authentication** pop-up is displayed, depending on your default MFA type.

Click **Try another way**.

The **Other way to login** page is displayed with available MFA types as links you can choose from.

Warning: If you enter an incorrect response three times, your account is locked. You receive an email with a link to reset your password.

Forgot Username

Retrieving a forgotten username.

To retrieve your username:

Procedure

1. Enter your email address into the **Email** field.
2. Click the **Submit** button.

Results

An email with information regarding your username will be sent to your email address.

Forgot Password

Retrieving a forgotten password.

To reset your password:

Procedure

1. Enter your username into the **Username** field.

    Note: If you don't know your username you can use the **Forgot Username** link to retrieve your username.

2. Click the **Submit** button. An email containing a link to reset your password will be sent to you.
3. Click the link in the email that was sent to you.
4. Provide a new password in the **New Password** field.

    Note: The password must meet the requirements provided on the page and it must be different from your last five passwords.

5. Provide the same password in the **Confirm Password** field.
6. Click the **Submit** button.

Change password

Changing your password.

Procedure

1. Enter your password into the **Current Password** field.
2. Enter your new password into the **New Password** field.

    Note: Password must meet the requirements provided on the page. The new password must be different from the last five passwords.

3. Re-enter your new password into the **Confirm Password** field.
4. Click **Submit** to save the changes.

Helpful Information

This page provides useful information on how to use the website.

Help is provided in the form of HTML and PDF documents, as well as videos and a link to the FAQ.

Subscribe

New users must register on the Subscribe page.

Procedure

1. Enter all required information, such as Company Name and Country, into the given fields in the **Company Details** area.
2. Enter all required information, such as Title and First Name, into the **User Details** area.
3. Select your login preferences. The system will remember these preferences and use them on all subsequent logins.
4. Click the **Submit** button to be taken to step 2 of the registration process.

   Note: Step 2 is optional and can be skipped by clicking the **Skip** button.

5. Select the community you want to join, then click **Join**.

Upon clicking **Join** a confirmation alert will be displayed.

   Note: In some cases where the community needs further information from the user, the user may have to provide that information after clicking **Join**.

Joining an existing company

Procedure

1. Click the **Join Existing Company** button.
2. In the Search Company window that is displayed, provide your company name in the **Company Name** field.
3. Select your company name and click **Join Company**.

Company information fields will be auto-filled on the registration page.

Announcements

Announcements display messages from or about the system, your communities, and Rocket Software. If you have not read all the announcements, the number of unread items displays to the right of **Announcements**.
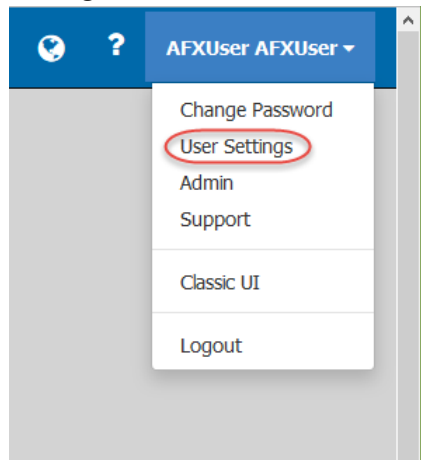
Procedure

1. Select the **Announcements** tab in the left pane.
2. Select any announcement to read the full text in the pane on the right.

Editing your profile

You can modify the information in your profile.

Procedure

1. Click the arrow next to your name in the upper-right corner of the screen and select **User Settings**.
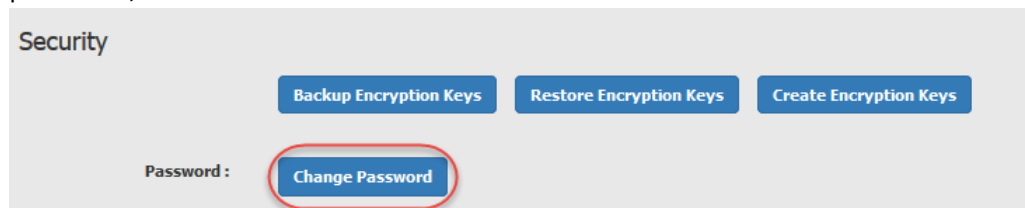

2. On the **User Settings** page, update your information as needed.

    Note: You cannot change your login ID.

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3. To change your password, click the **Change Password** button, enter your current and new passwords, and click the **Submit** button.


4. Click the **Save** button to save your profile changes.

Encryption

If you subscribed to a community that requires private encryption keys, then you were prompted to create a set of encryption keys that provide security for exchanging files. If you did not back up the keys when you created them, then you should back up this set of keys from the **User Settings** page.

Procedure

1. Click the arrow next to your name in the upper-right corner of the screen and select **User Settings**.
2. Click the **Backup Encryption Keys** button in the **Security** area.
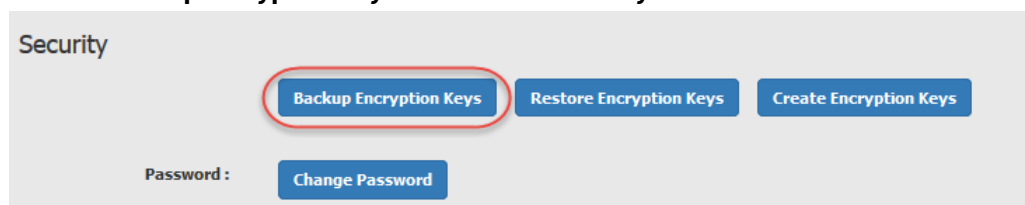
3. Click the **OK** button in the **Key Registration** window.

4. When the process is complete, click the **OK** button.

If your encryption keys are lost or damaged, an error message pop-up window displays. If you have backed up your encryption keys, click the **Restore Encryption Keys** button and specify the location where you backed up the keys. If you do not have a backup, click the **Create Encryption Keys** button to generate a new set of keys.

Note: If you generate a new set of encryption keys, you will not be able to download files that were already sent to you, and you will not be able to cancel previous transactions for files you sent.

Adding contacts

To exchange files with other contacts, you must first add them to your contact list from the list of global contacts.

Procedure

1. In the navigation bar, select **Contacts** to see your current list of contacts, then click **Add Contact** to display the **Global Contacts** list. You can search by users or user groups.
2. In the fields, specify search parameters for the contact or group.
3. Click **Search** to display the contacts or groups matching the search parameters.
4. From the search results displayed, select the check boxes next to the contacts or groups you want to add.

5. For adding contacts, click the **Add to contacts** button and for adding groups, click the **Add** button.

> **Note:** If the global contact list does not contain the contact you want to add, send the following information to support@rocketsoftware.com to have Rocket Support ask the contact to obtain a subscription.
>
> - Company name
> - Address
> - State (if applicable)
> - Country
> - Zip Code
> - Contact's name
> - Contact's email address
> - Contact's phone number
>
> Once you are notified by email that the contact has subscribed, you can add the contact to your contact list and begin sending files. When the new contact logs in for the first time, the sent files will be available for download.

Adding user groups

1. In the navigation bar, select **User Groups**.

   On the **User Groups** page, you can search for user groups that are already added. You can also add a user group as follows:

2. Click **New Group**.

3. On the **Create Group** page, enter the parameters, select a community, and click **Save**. The user group can contain only members of the selected community. If you select the **Shared Group** option, the group will be shared with company users who are part of the same community.

   You can enable, disable, or edit the user groups by clicking the appropriate buttons. You can also manage users as described in .

Managing group users

1. In the navigation bar, select **User Groups**, select the group, and click **Manage Users**.

2. On the **Manage Users (*GroupName*)** page, the name of community related to the group is displayed at the top. Click **Add User**.

3. On the **Add Users** dialog, select the users and click **Add**. You can also search for users and add them.

   The selected users are added to the group.

4. Click **Close**.

   On the **Manage Users (*GroupName*)** page, you can also remove users from a group by selecting them and clicking **Remove**.

Sending files

You can send files to any contact in your contact list.

If you use a browser that no longer supports Java, such as Microsoft Edge, Chrome version 42 and later, and Firefox version 52 and later, you must use Java Web Start (JWS) to initiate the file transfer.

JWS is an alternative to using Rocket TRUexchange directly in your browser with a Java Applet. JWS is not embedded in your browser, and runs as a local Java application.

If you do not want to use Java, you can install TRUexchange Web Client. See Overview of available TRUexchange clients , on page 6.

Procedure

1. From the navigation bar, click **Send files**.

2. Select a community from the **Community** drop-down list.

3. Enter one or more contact names in the **To** field. You can also click the **To** button to select contacts from a list.

4. **Optional:** Enter one or more contact names in the **CC** field. You can also click the **CC** button to select contacts from a list, add contacts to the CC email list, or remove contacts from the CC email list.

5. In the **Delete After** drop-down list, select the number of days the files are to be available to the receiver. You can specify up to 14 days.

6. **Optional:** Enter a comment in the **Comments** field.

7. If your browser supports Java, click the **Add** button to select files to send.

a. If your browser does not support Java, the start of the application is not automated. You can initiate the file transfer with Java Web Start (JWS) or TRUexchange Web Client. Click the **Select Files** button.

▪ If you use Firefox and your download directory is not setup, or the setting to always ask where you want to save files is selected, a save-file alert is displayed. Select **Open with Java™ Web Start Launcher**, and click **OK**. When the Java dialog launches, click **Run**.

▪ If you use Chrome and the download directory is not setup, or the setting to ask where to save each file before downloading is selected, a save-file alert is displayed. In this case, you must save the file and then additionally click the file icon to start the application in the bottom-left corner of the browser.

▪ If you use Chrome and the download directory is setup and the setting to ask where to save each file before downloading is not selected, then the save-file alert is not displayed. In the bottom-left corner of the browser you need to click the **Keep** button. Then click on the file

icon in the bottom-left corner of the browser to initiate the application. When the Java dialog launches, click **Run**.

8. Navigate to the folder containing the files you want to add, select the files, and click **Attach**.

9. To add files from other folders, repeat the previous two steps.

10. Verify that all the contacts and files are correct, then click the **Send Files** button to initiate the transaction.

    A confirmation message displays when the files have been uploaded. To see your outstanding transactions, click **Sent** in the navigation bar on the left.

Note: You can cancel any incomplete transaction by selecting it and clicking the **Cancel transaction** button in the information area on the right.

Receiving files

You can receive files from your contacts.

If you use a browser that no longer supports Java, such as Microsoft Edge, Chrome version 42 and later, and Firefox version 52 and later, you must use Java Web Start (JWS) to initiate the file transfer. JWS is an alternative to using Rocket TRUexchange directly in your browser with a Java Applet. JWS is not embedded in your browser, and runs as a local Java application.

Procedure

1. From the navigation bar, click **Inbox** to view all the transactions that have been sent to you.

2. Click on a transaction in the inbox to display the files it contains and other transaction information.

3. If your browser supports Java, to download files, take one of the following actions:

- To download a single file, click its file name.

- To download all files at once, click on the **Download All Files** button for that transaction.

- To download all files for multiple transactions, select the desired transactions in the inbox and click the **Download** button at the top of the inbox.
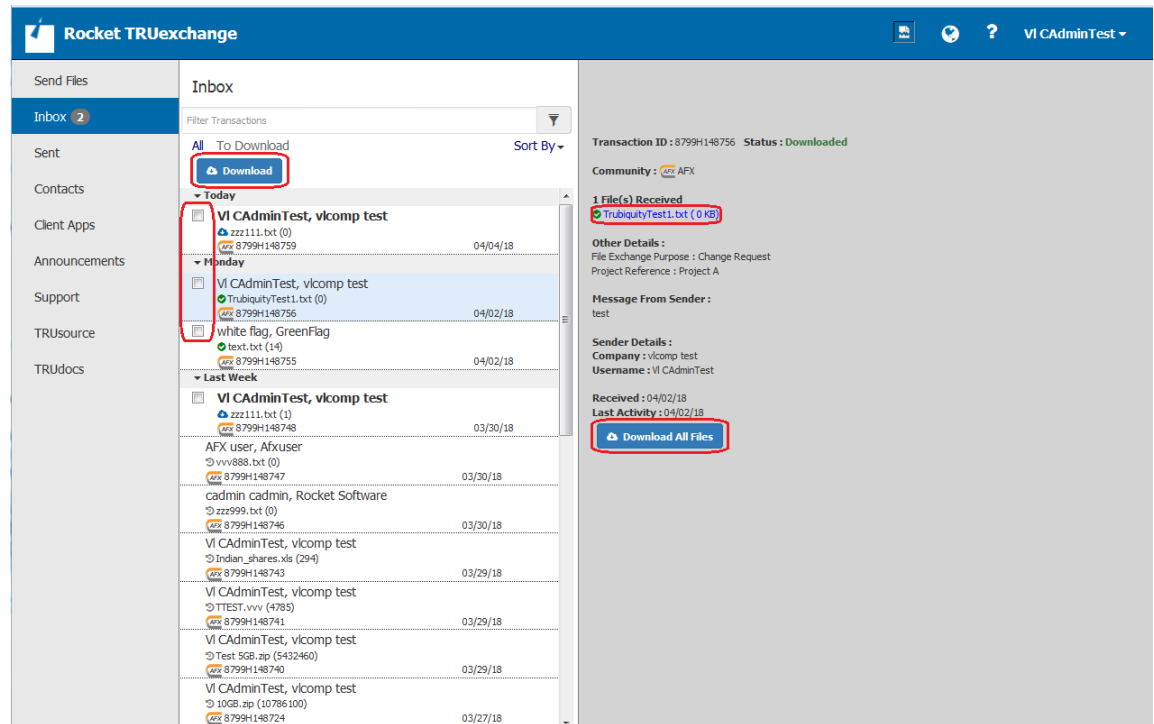
a. If your browser does not support Java, the start of the download is not automated. You can initiate the download with Java Web Start (JWS). Click one of the available **Download** buttons to launch JWS.

- If you use Firefox and your download directory is not setup, or the setting to always ask where you want to save files is selected, a save-file alert is displayed. Select **Open with Java™ Web Start Launcher**, and click **OK**. When the Java dialog launches, click **Run**.

- If you use Chrome and the download directory is not setup, or the setting to ask where to save each file before downloading is selected, a save-file alert is displayed. In this case, you must save the file and then additionally click the file icon to start the application in the bottom-left corner of the browser.

- If you use Chrome and the download directory is setup and the setting to ask where to save each file before downloading is not selected, then the save-file alert is not displayed. In the bottom-left corner of the browser you need to click the **Keep** button. Then click on the file icon in the bottom-left corner of the browser to initiate the application. When the Java dialog launches, click **Run**.

4. In the **File download** window click the **Save All To** button.

5. In the **Select a directory to save files into** window, navigate to the desired directory and click the **Save** button to start the download.

The **Downloading files** window shows the progress of the operation.

Note: You can click the **Pause** button to suspend the operation, then click the **Resume** button to continue the download.

Transaction Report

Using the transaction report.

Based on your role in the system, you can look up the information on transactions.

- If you are a Registered User, you can look up information on transactions that you have sent or received.
- If you are a Location Admin, you can look up information on transactions that you have sent or received. You can also use the filters to look up information on transactions that were sent or received by anyone else in your location.
- If you are a Company Admin, you can look up information on transactions that you have sent or received. You can also use the filters to look up information on transactions that were sent or received by anyone else in your company.

All the filters are wild search filters, meaning they will get all relevant information that matches the filters.

- Clicking the **Submit** button will get the information about transactions based on filters provided.
- Clicking the **Clear** button will reset all the filters to the default values.
- Clicking the **Download** button will download the CSV file with the searched information.
- Clicking the **Printable View** button will display the searched information in a printable view on a new page in your browser.
- Clicking the **Customize View** button will display a pop-up from which you can select the columns that will be displayed. For example, the **Filename** column is deselected by default, and you can add it to the view by selecting it.

You can click the **Transaction ID** cell in a row to view details of a transaction.

Logging out

Click the arrow next to your name in the upper-right corner of the screen and select **Logout**.

Note: When you click **Logout**, the Web Client clears the current user data, and then displays the client log in screen.

Chapter 5: Joining a TRUexchange community

To exchange files with your contacts in a TRUexchange GSN or AFX community, you must register or be registered with the Rocket Software TRUexchange platform and you must have logged in for the first time.

Registering

Prerequisites

You must have received an email either inviting you to join a TRUexchange GSN or AFX community or stating that you have been registered to a community.

About this task

If your email states that you are registered to a TRUexchange community, then your company administrator has already registered you. Omit this task and go to Logging in, on page 37. If your email invites you to join a TRUexchange community, complete the following steps:

Procedure

1. Click on the link in the invitation email, or navigate to https://b2bi.rocketsoftware.com and click the **Subscribe** button to start the registration process.
2. Click **Join existing company**, enter the first three characters of your company name, and click **Search**.
3. Find your company name in the search results, select it and click **Join Company** to display a list of its locations.
4. Find your location in the list and click it to auto-fill the remaining **Company Details** fields.
5. Fill in the **User Details** fields and click the **Submit** button.

   Note: Save your password.

6. In the confirmation window that displays, click **OK**.

   Note: When the verification completes, you may receive an email accepting your registration if your administrator has not setup auto-approval.

Logging in

Prerequisites

You must have registered with the Rocket Software TRUexchange platform and have a TRUexchange user ID and password.

1. Click the link provided in your user account email, or navigate directly to https://b2bi.rocketsoftware.com.
2. Enter your user ID and password, then click **Login**.
3. To accept the software license and service agreement, select the check box and click **I Agree**.

4. If prompted, download and install the required version of Java.

5. If you are prompted to create encryption keys, complete the following steps:

    a. Click **OK** to start the encryption key process.

    b. In the **Key Registration** dialog, click **OK** to generate the keys.

    c. After your keys have been generated, click **Yes** to save a backup copy of your keys.

    d. Select the default location for your keys or navigate to a new location, then click **OK** to save the backup file.

    e. Click **OK** to finish the process.

6. If you were registered by your administrator, you are prompted to change your password. Following the password requirements, enter your temporary password in the first field and your new password in the other two fields, click **Submit**, then click **OK**.

7. Notify your administrator that you are registered. Your administrator now assigns you to the proper subscription.

Results

After your administrator has assigned you to the subscription, you can begin exchanging files with your community contacts.

Chapter 6: Contacting technical support

For technical assistance with TRUexchange, email technical support at support@rocketsoftware.com or call one of the following numbers.

USA

Tel: +1 (248) 833-9000

Europe:

Tel: +44 (0)113 2 454 305

Germany:

Tel: +49 (0) 621-39155-0

China

+86 400-120-9242

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