



TransferIQ Orchestrate User Guide

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Introduction

The TransferIQ Orchestrate App seamlessly integrates with MFT/B2Bi solutions, providing a customized digital experience for onboarding trading partners and setting up file routes through a self-service platform with robust administrative oversight. A configurable workflow orchestrates the onboarding and file routing processes, enhancing collaboration and progress visibility for business users, administrators, and approvers. This system significantly reduces the time and resources needed to onboard and exchange files with new partners and manage and update routing details for existing partners. Automation of administrator actions minimizes costly manual errors, boosting overall efficiency. The app implements role-based access control to govern user views and actions, ensuring security. Additionally, Orchestrate App integrates seamlessly with SAML-based SSO systems like Okta, facilitating easy user access, and ITSM systems like ServiceNow for creating and updating RITMs for official record-keeping.

Roles

Functionality	Super Admin	MFT Admin	Business User
System Configuration	Yes		
Email Templates	Yes	Yes	
Add Users	Yes	Yes	
Add Business Unit	Yes	Yes	
Add Partner			Yes
Add Account Onboarding Data			Yes
Submit Account Onboarding for Approval			Yes
Account Creation Approvals	Yes	Yes	
Add Workflows			Yes
Submit Workflows for Approval			Yes
Review and Workflow Approvals	Yes	Yes	

Actors

Actor	Name	Description
Company	AWS	<p>The Enterprise represents your Organization, it includes the following:</p> <p>Internal Users and Systems Employees / Business Users from a Business Unit / Department within your company who initiate or receive file transfers.</p> <p>Core Infrastructure The internal SFTP servers using AWS Transfer Family SFTP Servers and Connectors.</p>
Partner	Rackspace	<p>The Partner represents external organizations or third-party entities that exchange files with the enterprise. These are usually customers, suppliers, or other business collaborators.</p>

		<p>Partner Users External stakeholders who connect to the enterprise MFT solution through secure protocols (e.g., SFTP).</p> <p>Partner Hosted SFTP Server Partners often have their own hosted SFTP servers or may directly connect to the enterprise's MFT-hosted SFTP server.</p>
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Accounts

Account	Name	Description
AWS Transfer Family Account	RackspaceAWSAccount	<p>An AWS Transfer Family Account is a user account created within the AWS Transfer Family SFTP server. It is provisioned and shared with external partners to enable secure file transfers between the partner's systems and the enterprise's MFT environment.</p> <p>Authentication Methods Supported</p> <p>AWS Transfer Family SFTP servers support the following authentication methods for partner access:</p> <p>Username + SSH Key (Key-Based Authentication)</p> <p>Partners are authenticated using a public SSH key associated with their account.</p> <p>Offers enhanced security and supports automated, password-less file transfers.</p>
Partner Hosted Account	RackspacePartnerPWD Account	A Partner Hosted Account is a user account created within the partner's SFTP server. It is shared with the

		<p>enterprise to enable secure file transfers, allowing the enterprise to connect to the partner’s environment for sending or receiving files.</p> <p>Authentication Methods for Partner SFTP Server</p> <p>Username + Password</p> <p>Traditional authentication using a secure username and password combination.</p> <p>Username + SSH Key</p> <p>Key-based authentication using a username and a registered SSH key for enhanced security and automation.</p>
--	--	---

Workflows

Account Type	Direction	Description
AWS Transfer Family Account Workflows	Inbound	<p>Inbound Workflow (Partner → Enterprise)</p> <p>Partner uploads files to the AWS Transfer Family SFTP server using their AWS Transfer Family Account.</p> <p>Files are stored in designated S3 folders (e.g., EFTS, PFTS) for internal processing.</p> <p>Enterprise workflows pick up the files and route them to downstream internal systems.</p>

	Outbound	<p>Outbound Workflow (Enterprise → Partner)</p> <p>The enterprise places files into designated S3 folders.</p> <p>AWS Transfer Family makes these files available to the partner through their AWS Transfer Family SFTP account.</p> <p>The partner downloads files securely using their AWS Transfer Family credentials.</p>
Partner Hosted Account Workflows	Inbound / Pull	<p>Inbound Workflow (Partner → Enterprise)</p> <p>Partner places files in their own SFTP server.</p> <p>Enterprise workflow connects to the partner's SFTP server using the Partner Hosted Account to pull files.</p> <p>Retrieved files are processed and stored internally within the enterprise's environment.</p>
	Outbound / Push	<p>Outbound Workflow (Enterprise → Partner)</p> <p>Enterprise workflow connects to the partner's SFTP server using the Partner Hosted Account.</p> <p>Files are securely pushed to the partner's environment for their use.</p>

		Ensures reliable delivery with tracking and logging.
--	--	--

File Transformations

Step	Description
Scan	Scans files for malware/threats
Copy	Duplicates files from source to destination
Move	Transfers files from source to destination and removes them from the source
PGP Encryption	Encrypts file by encrypting them with a PGP public key
PGP Decryption	Decrypts file by decrypting them with a PGP private key
Encode	Converts files into a specific format (e.g., Base64)
Decode	Converts encoded files back to their original format
Compress	Reduces file size using compression algorithms
Decompress	Restores compressed files to their original form
Tag	Adds labels or metadata to files for identification
Rename	Changes the name of files with the given name
Delete	Removes files from the source.

Sign Up First Time Super Admin

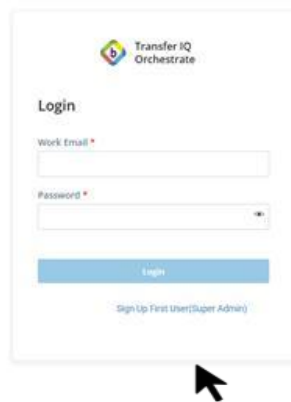
When the **Transfer IQ Orchestrate Application** is launched for the first time, the application does not contain any registered users. Since access to the application is restricted, it is necessary to add the **first user to start using the application**

To address this, the application automatically displays a screen prompting the registration of the initial user. This first user will be assigned **the Super Admin** role, allowing the user to configure settings, manage users, and perform other admin tasks.

This Super Admin account acts as the foundational user, enabling full access and control of the application

To sign up the first time Super Admin, follow the below steps

1. Click the **Sign Up First Super Admin** to begin the registration process for the first user, who will be assigned with role as **Super Admin**



2. Once the button is clicked a signup form will be displayed with the following fields
 - a. **First Name** – The first name of the Super Admin.
 - b. **Last Name** – The last name of the Super Admin.
 - c. **Email Address** – A valid email to be used for login and communication.
 - d. **Password** – A secure password for account access.
 - e. **Confirm Password** – Re-enter the password to confirm accuracy.
 - f. **Phone Number** – A valid phone number for verification or support.
3. Click the **Continue** button to complete the registration process

Transfer IQ Orchestrator

Sign up

First Name * Last Name *

MIT Super Admin

Email *

mit_admin@backflip.com

Password * Confirm Password *

Phone Number Role

Super Admin

Continue

Password Requirements:

- ✓ Password length must be minimum of 8 characters
- ✓ At least one lower case letter [a-z]
- ✓ At least one upper case letter [A-Z]
- ✓ At least one number [0-9]
- ✓ At least one special character from the set '~!@#%^&*()_-=+<>|;'

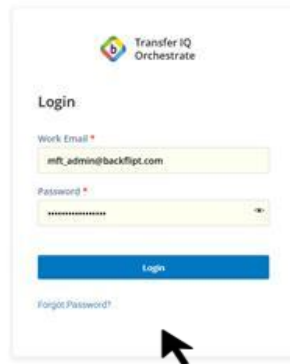
Powered by Backflip

TIQ_ORCH_v0.4.4

4. After the Super Admin is successfully registered, the application redirects to the following page after clicking on “Please Click Here to Login!” user will be redirected to the **Login page**.



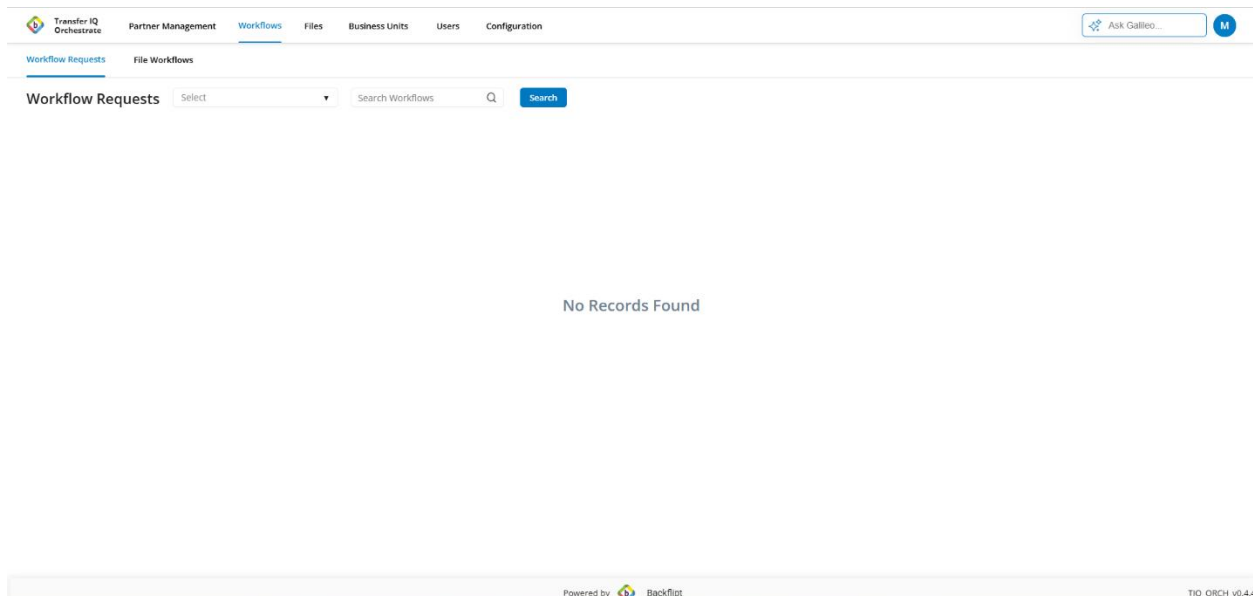
5. Enter the email and password and click the login button to login to the application



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6. Once login is successful, super admin is redirected to the application Workflows>Workflow Requests



Configuration

When the user clicks on the **Configuration** tab, they are redirected by default to the **SFTP Servers** section.

The **Configuration** tab contains the following four subsections:

- SFTP Servers
- MFT Settings
- Email and SSO Settings
- Additional Settings

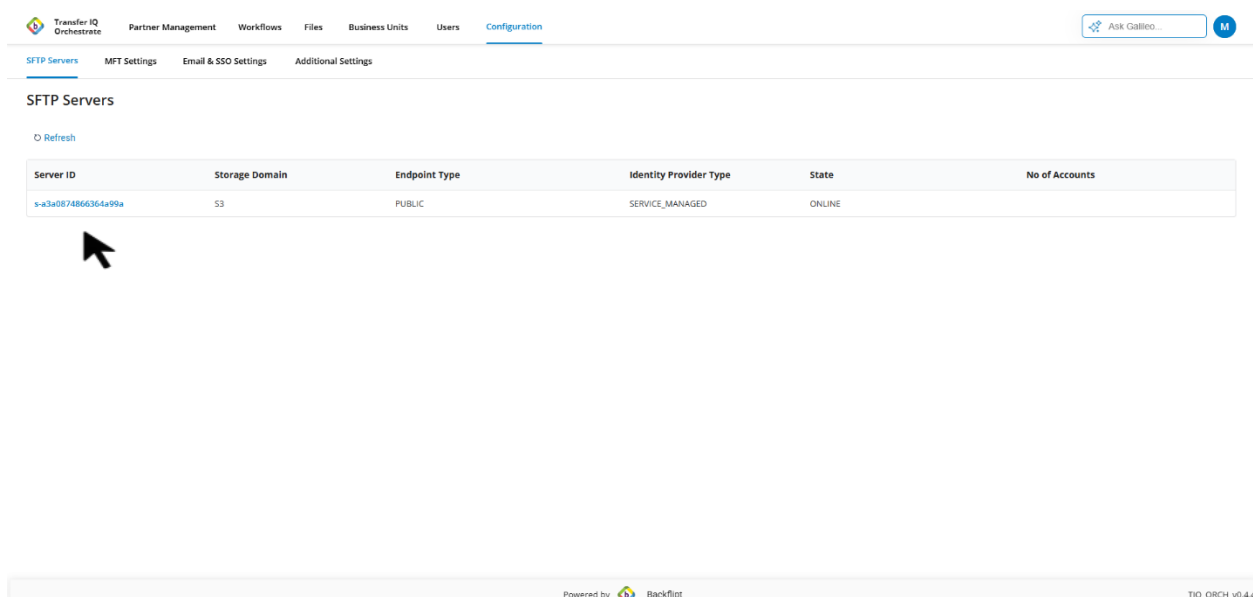
SFTP Servers

When the user clicks on Configuration tab navigates to the SFTP Servers.

The **SFTP Servers** section displays a list of available SFTP servers configured for the company. Each server entry provides the following details:

- **Server ID:** A unique identifier for the SFTP server. This is clickable and navigates the user to the server details page.
- **Storage Domain:** Indicates the storage type used, e.g., **S3**.
- **Endpoint Type:** Specifies the server's endpoint type, e.g., **Public**.
- **Identity Provider Type:** Displays the identity provider type, e.g., **SERVICE_MANAGED**.
- **State:** Shows the current server status, e.g., **Online**.
- **No of Accounts:** Displays the number of accounts created for this server (empty if no accounts are created yet).

Users can click on the **Server ID** to view more detailed information about that server.



The screenshot shows the 'Configuration' tab selected in the top navigation bar. Below it, the 'SFTP Servers' section is active, displaying a table with one server entry. A mouse cursor points to the 'Server ID' link in the first row of the table.

Server ID	Storage Domain	Endpoint Type	Identity Provider Type	State	No of Accounts
s-a3a0874866364e99a	S3	PUBLIC	SERVICE_MANAGED	ONLINE	

At the bottom of the page, there is a footer indicating 'Powered by Backflipit' and the version 'TIQ_ORCH_v0.4.4'.

The user can also click on the server, which navigates to the server page.

The screenshot shows the 'SFTP Servers' page within the 'Configuration' section of the Transfer IQ Orchestrator. The page has a top navigation bar with links for Partner Management, Workflows, Files, Business Units, Users, and Configuration. Below this is a sub-navigation bar with SFTP Servers, MFT Settings, Email & SSO Settings, and Additional Settings. The main content area is titled 'SFTP Servers' and includes a 'Refresh' button. A table lists the SFTP servers with columns for Server ID, Storage Domain, Endpoint Type, Identity Provider Type, State, and No of Accounts. A single server is listed with ID 's-a3a0874866364e99a', Storage Domain 'S3', Endpoint Type 'PUBLIC', Identity Provider Type 'SERVICE_MANAGED', State 'ONLINE', and No of Accounts '0'. A mouse cursor points to the Server ID. The footer shows 'Powered by Backflipit' and the version 'TIQ_ORCH_v0.4.4'.

Server ID	Storage Domain	Endpoint Type	Identity Provider Type	State	No of Accounts
s-a3a0874866364e99a	S3	PUBLIC	SERVICE_MANAGED	ONLINE	0

When a user clicks on a **Server ID** from the SFTP Servers list, they are navigated to the server details page. This page displays detailed information about the selected server, including:

- Storage Domain
- Endpoint Type
- Identity Provider Type
- Server ID
- Status
- No of Accounts

The screenshot shows the 'Configuration' tab in the Transfer IQ Orchestrator interface. Under the 'SFTP Servers' sub-tab, a specific server is selected with ID 's-a3a0874866364a99a'. The server's properties are listed in a table:

Storage Domain	S3
Endpoint Type	PUBLIC
Identity Provider Type	SERVICE_MANAGED
Server ID	s-a3a0874866364a99a
State	ONLINE
No of Accounts	

The footer of the page indicates it is 'Powered by Backflipit' and shows the version 'TIQ_ORCH_v0.4.4'.

This view provides a quick summary of all key server properties for better visibility and troubleshooting.

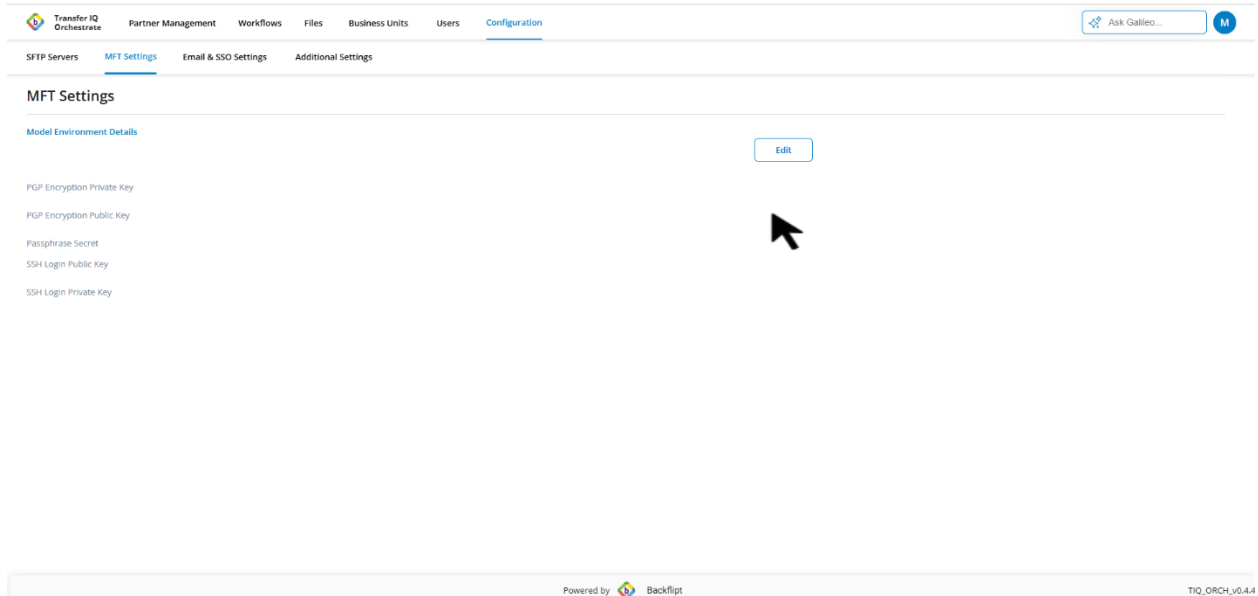
MFT Settings

Click on MFT Settings to navigate to the MFT Settings section in the Configuration tab.

By default, the page shows an empty state with the following fields:

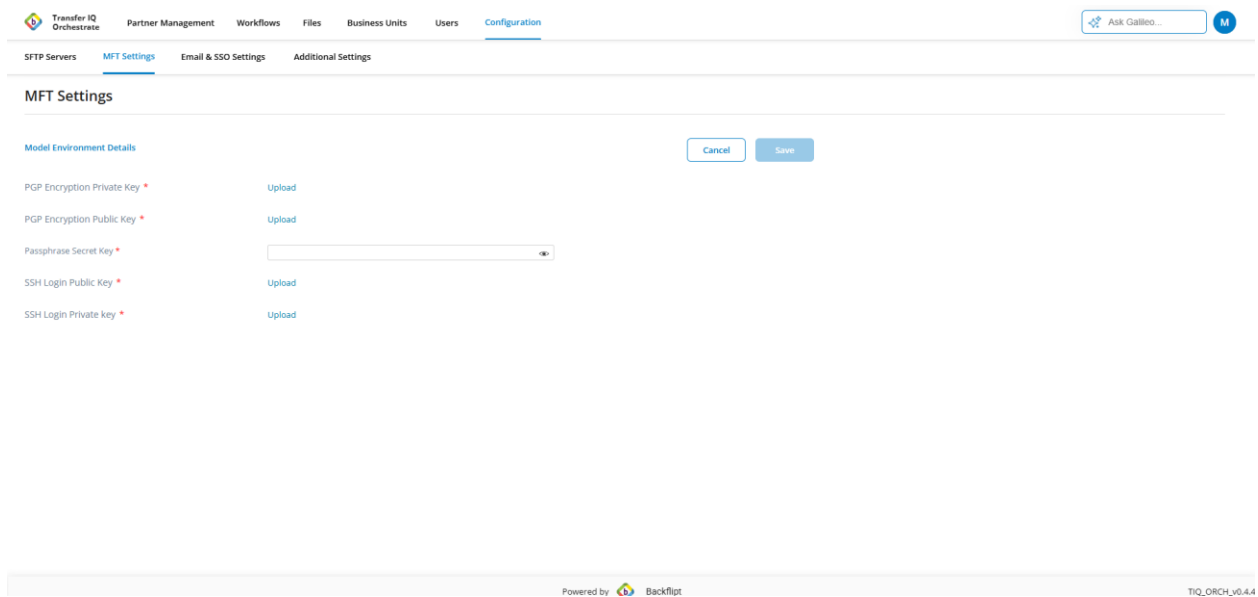
It includes the following fields:

- PGP Encryption Private Key
- PGP Encryption Public Key
- Passphrase Secret Key
- SSH Login Public Key
- SSH Login Private Key



At the top-right, an **Edit** button is available.

When the user clicks **Edit**, they can configure and upload valid certificates or keys for each of the above fields.



The screenshot shows the 'MFT Settings' configuration page. At the top, there's a navigation bar with 'Transfer IQ Orchestrator' and various menu items like 'Partner Management', 'Workflows', 'Business Units', 'Users', and 'Configuration'. Below this, there's a sub-navigation bar with 'SFTP Servers', 'MFT Settings' (selected), 'Email & SSO Settings', and 'Additional Settings'. The main content area is titled 'MFT Settings' and contains a 'Model Environment Details' section. This section lists several configuration items: 'PGP Encryption Private Key - Model' with an 'Upload' button and a 'Delete' link; 'PGP Encryption Public Key - Model' with an 'Upload' button and a 'Delete' link; 'Passphrase Secret Key' with a text input field and a 'Show/Hide' icon; 'SSH Login Public Key - Model' with an 'Upload' button and a 'Delete' link; and 'SSH Login Private Key - Model' with an 'Upload' button and a 'Delete' link. At the top right of the settings area, there are 'Cancel' and 'Save' buttons. The footer of the page indicates it is 'Powered by Backflip' and shows the version 'TIQ_ORCH_v0.3.8'.

Upon clicking on Save the provided details by the user will be saved.

PGP Encryption Public Key:

This is a **publicly shared key** used for file encryption.

- When a partner needs to send files to the company, the company provides this public key in the *Account Creation Successful* email.
- The partner uses this public key to encrypt files on their end, ensuring that the files can only be decrypted by the company.
- Since it is a public key, it is safe to share with external partners.

PGP Encryption Private Key:

This is the **private key** that corresponds to the public key above.

- The company keeps this key secure and never shares it.
- When encrypted files are received from a partner, the company uses this private key to decrypt and access the file contents.
- The private key, together with the passphrase (if configured), ensures that only authorized company users can decrypt the data.

Passphrase Secret Key:

This acts as an **additional security layer** for the PGP private key.

- The passphrase must be entered whenever the private key is used for decryption.

- This prevents unauthorized use of the private key, even if someone gains access to the key file.
- It ensures end-to-end data confidentiality by adding another authentication step.

SSH Login Public Key:

This is the **public part of the SSH key pair** used for server authentication.

- The company shares this public key with the partner in the *Account Creation Successful* email.
- The partner adds this public key to their server's authorized keys list.
- Once configured, it allows the company to log in securely to the partner's server without using a password.

SSH Login Private Key:

This is the **private part of the SSH key pair**, which must be kept secure by the company.

- The company uses this private key to authenticate itself when logging in to the partner's server.
- Together with the public key stored on the partner's server, it enables a secure, password-less SSH connection.
- The private key should never be shared or exposed, as it grants direct access to the partner's server.

Email and SSO Settings

Click on Configuration > Email and SSO Settings to view and edit the email and SSO settings

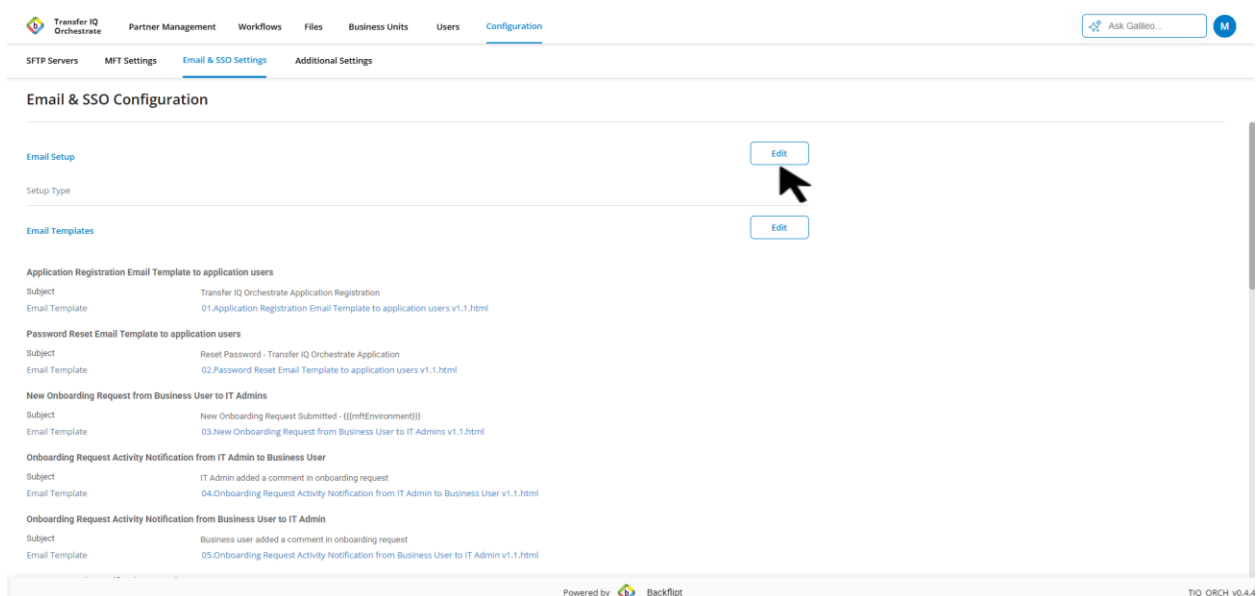
Email and SSO Settings consists of three sub sections

1. Email Setup
2. Email Templates
3. SSO Settings

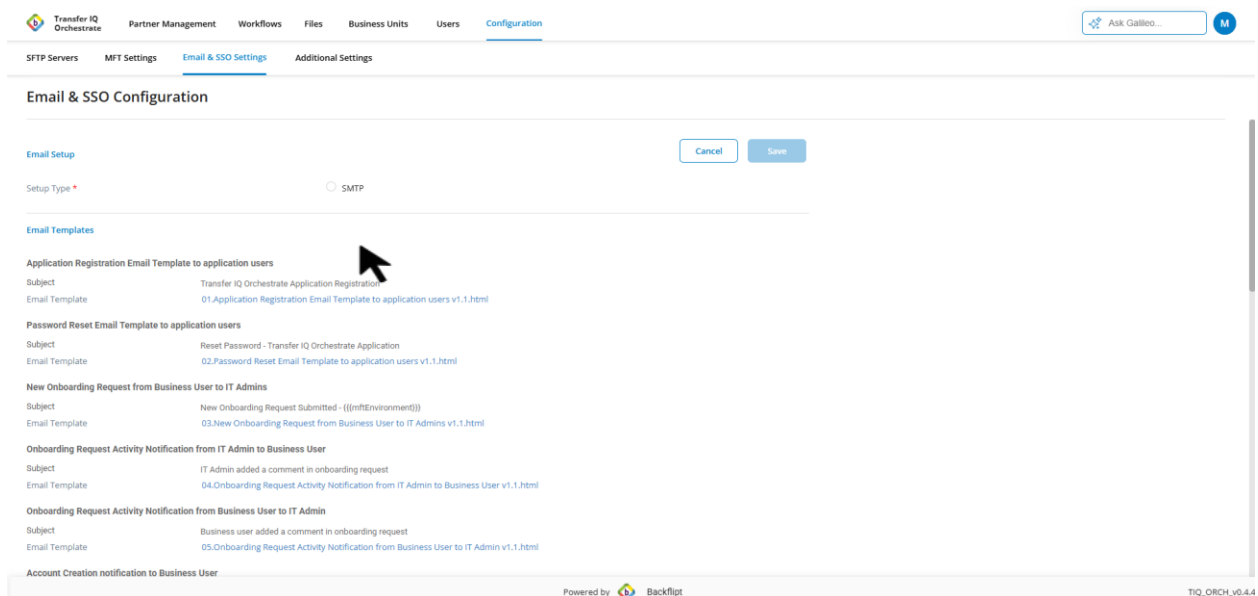
Email Setup

The **Email Setup** section is used to configure how the application sends emails.

Click the Edit button to edit the email setup



The application supports SMTP (Simple Mail Transfer Protocol) for sending emails, which requires specifying the appropriate email server and credentials.



This section contains the below fields

1. **Setup Type** - Specifies the method used to send emails. Transfer IQ Orchestrator application supports **SMTP**, which is a standard protocol for sending email messages between servers.
2. **Email** - The email address that will appear as the sender of system-generated emails.
3. **Username** - The username used to authenticate with the email server.

4. **Password**- The password associated with the email account or application-specific password. This is used to authenticate the application with the SMTP server.
5. **Outbound Email Server** - The address of the SMTP server through which emails will be sent. This is provided by the email service (e.g., Office 365.)
6. **Port** - The port number used to connect to the SMTP server. (Example: 587)

The image displays two screenshots of the 'Email & SSO Configuration' page in the Transfer IQ Orchestrator interface. The top screenshot shows the 'Email Setup' section with empty input fields for Email, Username, Password, Outbound Email Server, and Port. The bottom screenshot shows the same page with the fields populated: Email and Username are 'mft_admin@backflip.com', Password is masked with asterisks, Outbound Email Server is 'smtp.office365.com', and Port is '587'. A mouse cursor is pointing at the 'Test' button in both screenshots.

Email Setup

Setup Type * ☒ SMTP

Email *

Username

Password

Outbound Email Server *

Port *

Test

Email Templates

Application Registration Email Template to application users

Subject Transfer IQ Orchestrator Application Registration

Email Template 01.Application Registration Email Template to application users v1.1.html

Password Reset Email Template to application users

Subject Reset Password - Transfer IQ Orchestrator Application

Email Template 02.Password Reset Email Template to application users v1.1.html

New Onboarding Request from Business User to IT Admins

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TIQ_ORCH_v0.4.4

Once the Super Admin has entered all the SMTP details, Super Admin click the **"Test"** button to verify the connection. If the connection is successful, a confirmation message will be displayed indicating that the email server has been successfully connected.

Email & SSO Configuration

Email Setup [Cancel] [Save]

Setup Type * ☒ SMTP

Email *

Username

Password

Outbound Email Server *

Port *

[Test] ✓Email server connection successful

Email Templates

Application Registration Email Template to application users

Subject Transfer IQ Orchestrate Application Registration

Email Template 01.Application Registration Email Template to application users v1.1.html

Password Reset Email Template to application users

Subject Reset Password - Transfer IQ Orchestrate Application

Email Template 02.Password Reset Email Template to application users v1.1.html

New Onboarding Request from Business User to IT Admins

Powered by Backflip TIQ_ORCH_v0.4.4

After a successful test, click the **"Save"** button to save the details. Once saved, the details will appear in **view mode** within the **Email Setup** section

Email & SSO Configuration

Email Setup [Edit]

Setup Type SMTP

Email mft_admin@backflip.com

Username mft_admin@backflip.com

Password *****

Outbound Email Server smtp.office365.com

Port 587

Email Templates [Edit]

Application Registration Email Template to application users

Subject Transfer IQ Orchestrate Application Registration

Email Template 01.Application Registration Email Template to application users v1.1.html

Password Reset Email Template to application users

Subject Reset Password - Transfer IQ Orchestrate Application

Email Template 02.Password Reset Email Template to application users v1.1.html

New Onboarding Request from Business User to IT Admins

Subject New Onboarding Request Submitted - {{{mfEnvironment}}}

Email Template 03.New Onboarding Request from Business User to IT Admins v1.1.html

Powered by Backflip TIQ_ORCH_v0.4.4

Email Templates

Upon the first login of the **First Super Admin**, a set of default **Email Templates** is automatically populated in the email templates section. These templates define the content and subject lines for various system-generated emails such as user invitations, password resets, and notifications etc.

Click the edit button to make changes to the existing templates

Transfer IQ Orchestrator

Partner Management

Workflows

Files

Business Units

Users

Configuration

Ask Galileo...

M

SFTP Servers

MFT Settings

Email & SSO Settings

Additional Settings

Email & SSO Configuration

Email Setup

Edit

Setup Type	SMTP
Email	mft_admin@backflpt.com
Username	mft_admin@backflpt.com
Password	*****
Outbound Email Server	smtp.office365.com
Port	587

Email Templates

Edit

Application Registration Email Template to application users

Subject

Transfer IQ Orchestrator Application Registration

Email Template

01.Application Registration Email Template to application users v1.1.html

Password Reset Email Template to application users

Subject

Reset Password - Transfer IQ Orchestrator Application

Email Template

02.Password Reset Email Template to application users v1.1.html

New Onboarding Request from Business User to IT Admins

Subject

New Onboarding Request Submitted - [[[mftEnvironment]]]

Email Template

03.New Onboarding Request from Business User to IT Admins v1.1.html

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TIQ_ORCH_v0.4.4

Each email template includes the following elements:

- 1. Upload Button** - Allows the Super Admin to upload a custom email template file, replacing the default content if desired.

Transfer IQ Orchestrator

Partner Management

Workflows

Files

Business Units

Users

Configuration

Ask Galileo...

M

SFTP Servers

MFT Settings

Email & SSO Settings

Additional Settings

Email & SSO Configuration

Email Templates

Cancel

Save

Portal Registration Email Template to portal users		
Subject	Transfer IQ Orchestrator Application Registration	
Email Template	<div>Upload Template</div> <div>01.Application Registration Email Template L...</div> <div>Delete</div>	
Password Reset Email Template to portal users		
Subject	Reset Password - Transfer IQ Orchestrator Application	
Email Template	<div>Upload Template</div> <div>02.Password Reset Email Template to applic...</div> <div>Delete</div>	
New Onboarding Request from Business User to IT Admins		
Subject	New Onboarding Request Submitted - [[[mftEnvironment]]]	
Email Template	<div>Upload Template</div> <div>03.New Onboarding Request from Business ...</div> <div>Delete</div>	
Onboarding Request Activity Notification from IT Admin to Business User		
Subject	IT Admin added a comment in onboarding request	
Email Template	<div>Upload Template</div> <div>04.Onboarding Request Activity Notification ...</div> <div>Delete</div>	

- 2. Subject** - Displays the default subject line of the email, which can be edited.

The screenshot shows the 'Email & SSO Configuration' page. At the top, there's a navigation bar with 'Transfer IQ Orchestrate' logo and tabs for 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. Below this is a sub-navigation bar with 'SFTP Servers', 'MFT Settings', 'Email & SSO Settings' (selected), and 'Additional Settings'. The main content area is titled 'Email Templates' and has 'Cancel' and 'Save' buttons. It lists four email templates, each with a subject line, an 'Email Template' field, an 'Upload Template' link, a template ID, and a 'Delete' button. A mouse cursor is pointing at the 'Delete' button for the first template.

Subject	Email Template	Upload Template	Template ID	Delete
Portal Registration Email Template to portal users	Transfer IQ Orchestrate Application Registration	01.Application Registration Email Template L...	Delete	
Password Reset Email Template to portal users	Reset Password - Transfer IQ Orchestrate Application	02.Password Reset Email Template to applic...	Delete	
New Onboarding Request from Business User to IT Admins	New Onboarding Request Submitted - [[[mftEnvironment]]]	03.New Onboarding Request from Business ...	Delete	
Onboarding Request Activity Notification from IT Admin to Business User	IT Admin added a comment in onboarding request	04.Onboarding Request Activity Notification ...	Delete	

3. Delete Button - Removes the previously uploaded template and helps to upload a new template.

This screenshot is similar to the first one, showing the 'Email & SSO Configuration' page. However, the mouse cursor is now pointing at the 'Delete' button for the second template, 'Reset Password - Transfer IQ Orchestrate Application'.

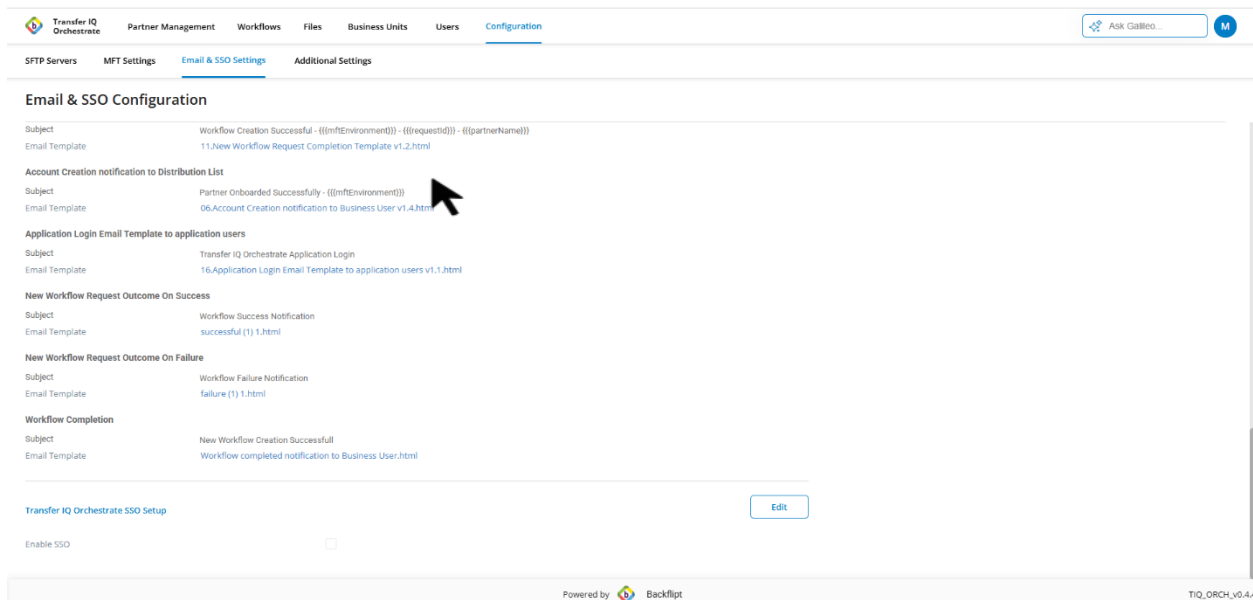
Subject	Email Template	Upload Template	Template ID	Delete
Portal Registration Email Template to portal users	Transfer IQ Orchestrate Application Registration	01.Application Registration Email Template L...	Delete	
Password Reset Email Template to portal users	Reset Password - Transfer IQ Orchestrate Application	02.Password Reset Email Template to applic...	Delete	
New Onboarding Request from Business User to IT Admins	New Onboarding Request Submitted - [[[mftEnvironment]]]	03.New Onboarding Request from Business ...	Delete	
Onboarding Request Activity Notification from IT Admin to Business User	IT Admin added a comment in onboarding request	04.Onboarding Request Activity Notification ...	Delete	

The Email Templates section contains the following templates

- Application Registration Email Template to application users
- Password Reset Email Template to application users
- New Onboarding Request from Business User to IT Admins
- Onboarding Request Activity Notification from Business User to IT Admin
- Onboarding Request Activity Notification from IT Admin to Business User
- Account Creation notification to Business User
- Onboarding completed notification to Business User
- New Workflow Request Notification to IT Admins

- Workflow Request Activity Notification from IT Admin to Business User
- Workflow Request Activity Notification from Business User to IT Admin
- New Workflow Request Completion Template
- Account Creation notification to Distribution List
- Application Login Email Template to application users
- New Workflow Request Outcome On Success
- New Workflow Request Outcome On Failure
- Workflow Completion

After uploading all the templates, click the **"Save"** button to save the details. Once saved, the details will appear in **view mode** within the **Email Templates** section

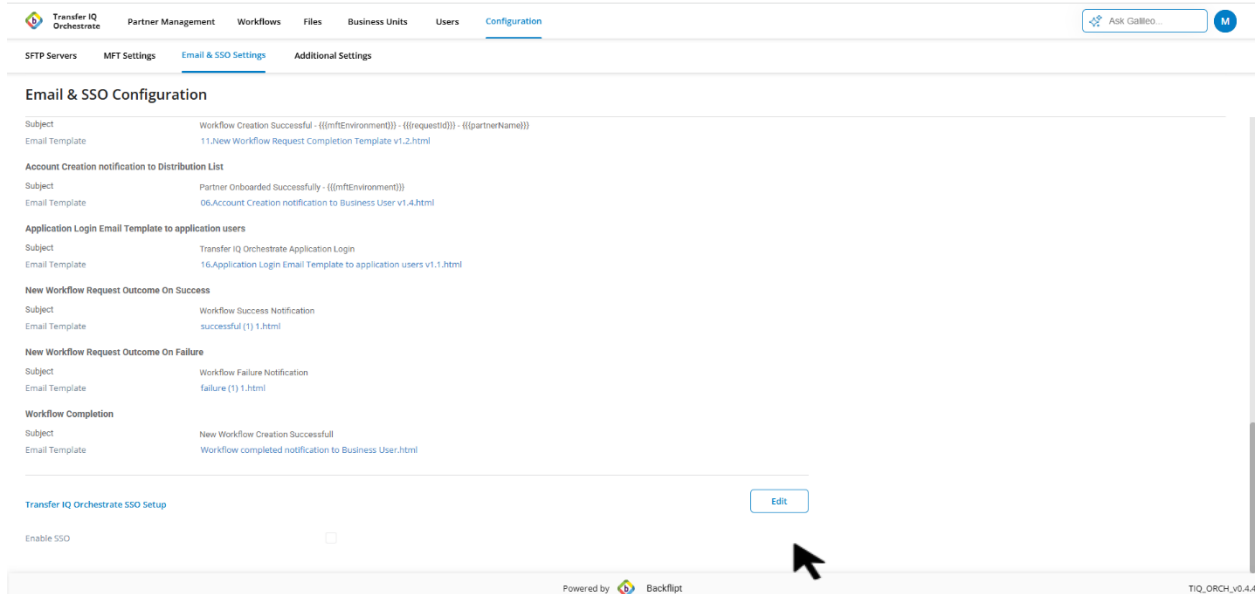


Transfer IQ Orchestrator SSO Setup

Single Sign-On (SSO) is a user authentication method that allows users to log in once and access multiple applications or systems without needing to log in again for each one.

Instead of managing separate usernames and passwords for each application, users log in through a central **Identity Provider (IdP)** like **AWS IAM Identity Center**.

Super admin can enable and disable SSO by editing and simply checking and unchecking the checkbox



The SSO Section when enabled consists of the below fields

SSO Configuration Fields – Mandatory and Required Fields

- **IdP Service** - The Identity Provider used for SSO. (e.g., **IAM Identity Center**)
- **Entity ID** - This is the **Issuer URL** that uniquely identifies the IAM Identity Center.
- **Sign-in Page URL** - This is the AWS SAML Assertion Consumer Service (ACS) URL from IAM Identity Center, where users are redirected to log in when SSO is enabled
- **Whitelist URL** - The allowed redirect domains after successful SSO login. (Example: <https://d-9067cad15b.awsapps.com>)
- **IdP X.509 Certificate** - The Super Admin uploads the Base64-encoded X.509 certificate provided in the IAM Identity Center SAML metadata file, which is used to validate SAML responses from AWS

SSO Logout Configuration (Optional)

- **Single Logout URL** - This is the URL where users are redirected to log out from the Identity Provider when they sign out of the application. It helps ensure that the user is logged out from all connected applications in a single action.
- **Logout Public Certificate**- A public certificate used to verify the logout requests sent by the Identity Provider. This certificate can be uploaded to secure the logout process.

- **Logout Private Key** - A private key used by the application to sign logout requests sent to the Identity Provider. Uploading this key enhances security during the logout process.

Transfer IQ Orchestrator

Partner Management Workflows Files Business Units Users Configuration

SFTP Servers MFT Settings Email & SSO Settings Additional Settings

Email & SSO Configuration

Transfer IQ Orchestrator SSO Setup

Cancel Save

Enable SSO ☒

IdP Service

Entity ID (Identity Provider issuer)

Sign-in Page URL

Whitelist URL

The whitelist URLs must be separated by `||`.

IdP X.509 Certificate Upload

Single Logout URL Upload

Logout Public Certificate Upload

Logout Private Key Upload

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TIQ_ORCH_v0.4.4

After providing all the details, click the "Save" button to save the details.

Transfer IQ Orchestrator

Partner Management Workflows Files Business Units Users Configuration

SFTP Servers MFT Settings Email & SSO Settings Additional Settings

Email & SSO Configuration

Transfer IQ Orchestrator SSO Setup

Cancel Save

Enable SSO ☒

IdP Service

Entity ID (Identity Provider issuer)

Sign-in Page URL

Whitelist URL

The whitelist URLs must be separated by `||`.

IdP X.509 Certificate Upload Delete

Single Logout URL

Logout Public Certificate Upload

Logout Private Key Upload

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TIQ_ORCH_v0.4.4

Once saved, the details will appear in view mode within the Transfer IQ Orchestrator SSO Setup section

Transfer IQ
Orchestrate

Partner ManagementWorkflowsFilesBusiness UnitsUsersConfiguration

Ask Galileo...M

SFTP ServersMIT SettingsEmail & SSO SettingsAdditional Settings

Email & SSO Configuration

New Workflow Request Outcome On Failure

SubjectWorkflow Failure Notification

Email Templatefailure (1) 1.html

Workflow Completion

SubjectNew Workflow Creation Successful

Email TemplateWorkflow completed notification to Business User.html

Transfer IQ Orchestrate SSO SetupEdit

Enable SSO☒

IdP ServiceIAM Identity Center

Entity ID (Identity Provider Issuer)https://identitycenter.amazonaws.com/ssoins-7223a69792407606

Sign-in Page URLhttps://portal.sso.us-east-1.amazonaws.com/saml/assertion/MTkyODY4MTc4NzczX2lucy1hMGM2N2UzZjMjMDMxMzc5

Whitelist URLhttps://d-9067cad15b.awsapps.com

IdP X.509 CertificateAWS_SSO_for_Custom SAML 2.0 application_certificate (2).pem

Single Logout URL

Logout Public Certificate

Logout Private Key

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Additional Settings

The **Additional Settings** section allows the super admin to configure global settings for the application. It includes the following options:

- **Email Distribution List:**

This field allows the super admin to configure a list of email addresses that will receive system notifications and alerts.

Transfer IQ
Orchestrate

Partner ManagementWorkflowsFilesBusiness UnitsUsersConfiguration

Ask Galileo...M

SFTP ServersMIT SettingsEmail & SSO SettingsAdditional Settings

Additional Configuration

Additional SettingsEdit

Email Distribution List ⓘ

Production Environment Settings

Production EnvironmentDisabled

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- The user can click **Edit** to add, remove, or update email addresses in this list.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

SFTP Servers MIT Settings Email & SSO Settings Additional Settings

Additional Configuration

Additional Settings Cancel Save

Email Distribution List

Production Environment Settings

Production Environment Disabled

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- **Production Environment Settings:**
Displays the status of the production environment (e.g., **Disabled**). This section is read-only and cannot be modified from this screen.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

SFTP Servers MIT Settings Email & SSO Settings Additional Settings

Additional Configuration

Additional Settings Cancel Save

Email Distribution List

Production Environment Settings

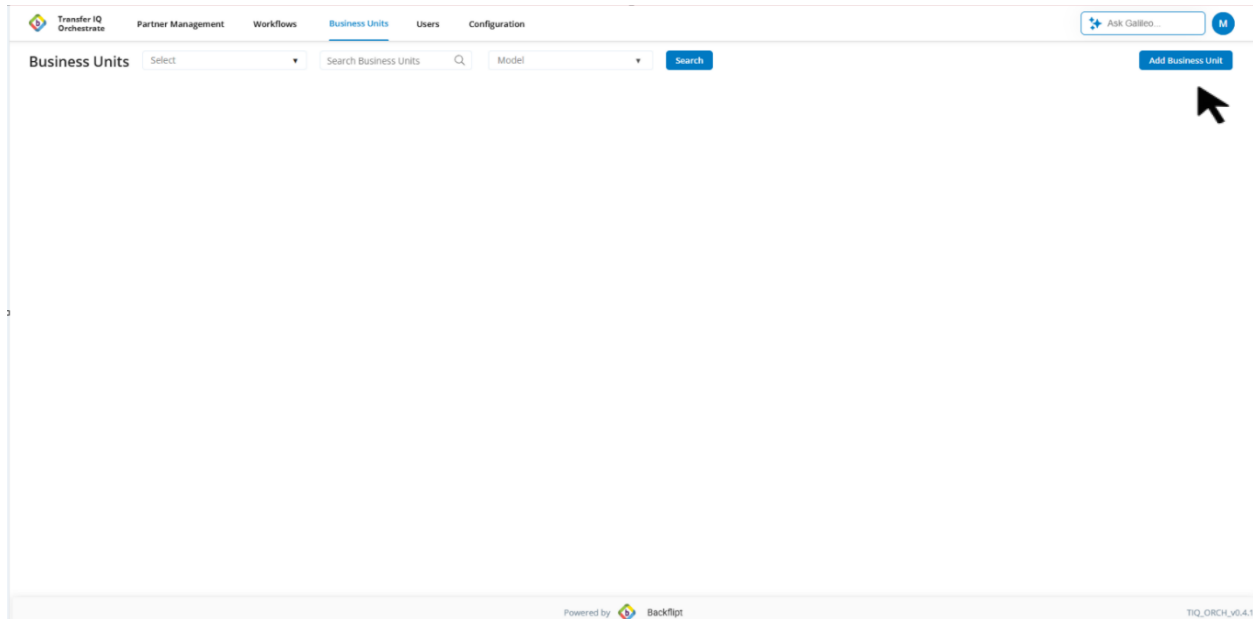
Production Environment Disabled

Powered by Backflit TIQ_ORCH_v0.4.4

Admin adds a Business Unit:

Click the Business Unit tab to view a table displaying the following columns: **Business Unit, Key Prefix, Status, Created By.**

1. Click the **“Add Business Unit”** button. A window will appear with fields to enter the Environment, Business Unit Name, Requestor Name, Requestor Email.



2. The following fields **Bucket Name, Key Prefix** will be auto populated with the respective bucket name.
3. Once all the required details are given, click on the **“Create”** button.

Transfer IQ
Orchestrate

Partner Management

Workflows

Business Units

Users

Configuration

Ask Galileo...

M

← Add Business Unit

Cancel>Create

Environment *

Model

Business Unit Name *

Sales

Check Availability

✓The Business Unit is available

Bucket Name *

bft-mft-tiq-tcs-prod

Key Prefix *

business-unit-folders/Sales

Requestor Name

MFT Super Admin

Requestor Email *

mft_admin@backflpt.com

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TIQ_ORCH_v0.4.1

4. The newly created business unit will be shown now in the Business unit tab table view.

Transfer IQ
Orchestrate

Partner Management

Workflows

Business Units

Users

Configuration

Ask Galileo...

M

Business Units

Select

Search Business Units

Model

Search

Add Business Unit

Count: 1

Business Unit	Key Prefix	Status	Created By
Sales	business-unit-folders/sales/	Business unit and policy created successfully	MFT Super Admin

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TIQ_ORCH_v0.4.1

Admin Onboards a Business User:

When adding a Business User, a Business Unit must be selected for that user. Business Units are not associated with Super Admin or IT Admin roles.

1. Click the Users tab to view a table displaying the following columns: **Name, Business Unit, Email, Last Login, Status, Role**

2. To add a new Business User, click the **"Add User"** button. A window will appear with fields to enter the user's role, first name, last name, phone number, Business Unit, and email address. After completing the form, click "Add" to save the new user.

Transfer IQ Orchestrator | Partner Management | Workflows | Business Units | **Users** | Configuration

Ask Galileo... M

Users | Select | Search Users | Search

Count: 1

Name	Business Unit	Email Address	Last Login	Status	Role
MFT Super Admin	N/A	mft_admin@backflpt.com	11 Sep 2025 at 12:13 PM	Registered	Super Admin

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Transfer IQ Orchestrator | Partner Management | Workflows | Business Units | **Users** | Configuration

Ask Galileo... M

← **Add User** | Cancel

Select Role * | Business User

Select Model Business Unit * | Sales

First Name * | MFT

Last Name * | Business User

Email * | mft_businessuser@backflpt.com

Phone |

Add

Powered by Backflpt | TIQ_ORCH_v0.4.1

3. An invitation will be sent to the user to register for the application.

Transfer IQ Orchestrate Partner Management Workflows Business Units **Users** Configuration

Ask Galileo... M

← Add User

Cancel

Select Role * Business User

Select Model Business Unit * Sales

First Name * MFT

Last Name * Business User

Email * mft_businessuser@backflipt.com

Phone

Add

✓User with email mft_businessuser@backflipt.com has been successfully added.

copy invite

Powered by Backflipt

TIQ_ORCH_v0.4.1

4. Added users appear in the Users tab. Users who have been invited but not yet registered will have the status "**User Invited**," while users who have completed their registration will have the status "**Registered**".

Transfer IQ Orchestrate Partner Management Workflows Business Units **Users** Configuration

Ask Galileo... M

Users Select Search Users Search Add User

Count: 2

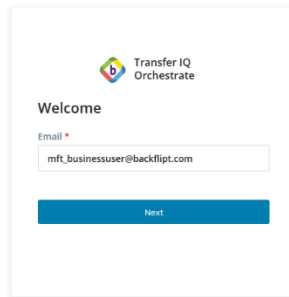
Name	Business Unit	Email Address	Last Login	Status	Role
MFT Business User	Sales	mft_businessuser@backflipt.com	N/A	User Invited	Business User
MFT Super Admin	N/A	mft_admin@backflipt.com	10 Sep 2025 at 08:53 PM	Registered	Super Admin

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TIQ_ORCH_v0.4.1

To register the business user, follow the below steps

Copy the invite, and paste it in the browser or click the registration link then the user will be redirected to the following page

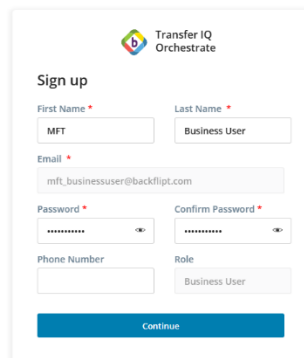


The image shows a 'Welcome' screen for the Transfer IQ Orchestrator. At the top is the logo, which consists of a blue square with a white 'b' and the text 'Transfer IQ Orchestrator'. Below the logo is the word 'Welcome'. Underneath is an 'Email' field with a red asterisk, containing the text 'mft_businessuser@backflip.com'. At the bottom is a blue button labeled 'Next'.

Powered by  Backflip

TIQ_ORCH_v0.4.5

Now click on Next



The image shows a 'Sign up' form for the Transfer IQ Orchestrator. At the top is the logo, which consists of a blue square with a white 'b' and the text 'Transfer IQ Orchestrator'. Below the logo is the word 'Sign up'. The form has several fields: 'First Name' (with a red asterisk) containing 'MFT', 'Last Name' (with a red asterisk) containing 'Business User', 'Email' (with a red asterisk) containing 'mft_businessuser@backflip.com', 'Password' (with a red asterisk) containing '*****', 'Confirm Password' (with a red asterisk) containing '*****', 'Phone Number', and 'Role' containing 'Business User'. At the bottom is a blue button labeled 'Continue'.

Password Requirements:

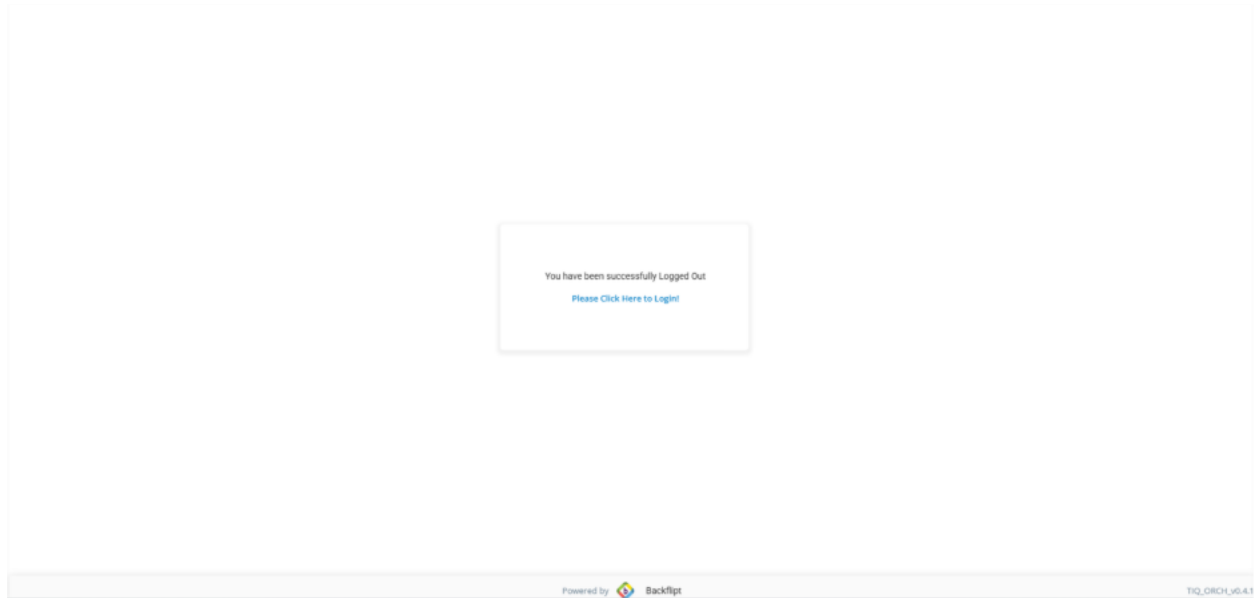
- ✓ Password length must be minimum of 8 characters
- ✓ At least one lower case letter [a-z]
- ✓ At least one upper case letter [A-Z]
- ✓ At least one number [0-9]
- ✓ At least one special character from the set '~!@#\$%^&*()_=->?.'

Powered by  Backflip

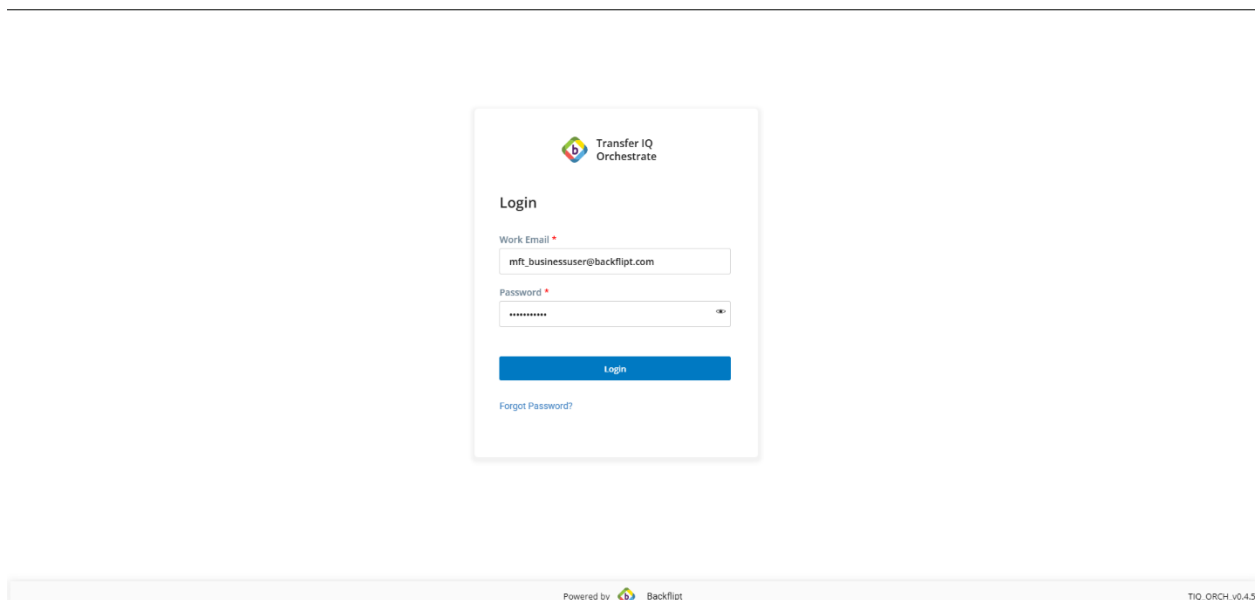
TIQ_ORCH_v0.4.5

1. Once the Next button is clicked a signup form will be displayed with the following fields
 - a. **First Name** – The first name of the Business User.
 - b. **Last Name** – The last name of the Business User.
 - c. **Email Address** – A valid email to be used for login and communication.
 - d. **Password** – A secure password for account access.
 - e. **Confirm Password** – Re-enter the password to confirm accuracy.
 - f. **Phone Number** – A valid phone number for verification or support.

2. Click the **Continue** button to complete the registration process
3. After the Super Admin is successfully registered, the application redirects to the following page after clicking on “Please Click Here to Login!” user will be redirected to the **Login page**.



4. Enter the email and password and click the login button to login to the application



5. Once login is successful, super admin is redirected to the application Workflows>Workflow Requests

Transfer IQ
Orchestrate

Partner Management

Workflows

Files

Ask Galleo...M

Workflow Requests

File Workflows

Workflow Requests

Select

Search Workflows

Search

New Workflow Request

Count: 0

No Records Found

Powered by Backflpt

TIQ_ORCH_v0.4.5

6. After the successful registration the status will be changed to **Registered** from **User Invited** in the Users tab

Transfer IQ
Orchestrate

Partner Management

Workflows

Business Units

Users

Configuration

Ask Galleo...M

Users

Select

Search Users

Search

Add User

Count: 2

Name	Business Unit	Email Address	Last Login	Status	Role
MFT Business User	Sales	mft_businessuser@backflpt.com	10 Sep 2025 at 07:35 PM	Registered	Business User
MFT Super Admin	N/A	mft_admin@backflpt.com	10 Sep 2025 at 07:57 PM	Registered	Super Admin

Powered by Backflpt

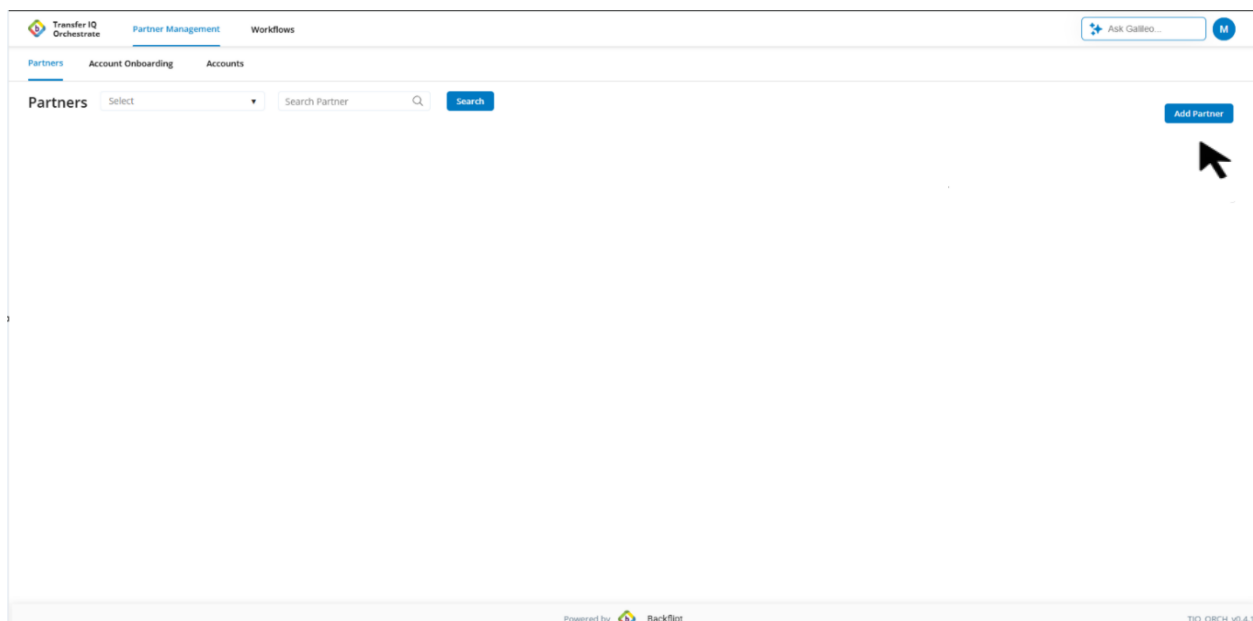
TIQ_ORCH_v0.4.1

Add Partners

Business User Onboards a Partner:

After registering and successfully logging into the application, the Business User is directed to the **Workflows** tab by default. From there, the user navigates to **Partner Management > Partners** to onboard a new partner. The Business User then completes the partner onboarding process within the application.

1. Navigates to the Partners section to view a table displaying the following columns: **Partner Name, Business Unit Name, Key Prefix, Contact Name, Contact Email, Updated At, Created By.**
2. To onboard a partner, select the "Add Partner" button, A window will appear with fields to enter the Partner Name, Partner website, and description. The form also includes sections for contact details, including contact role, name, email, secondary email, and phone number. A checkbox is provided to indicate if the contact is the primary point of contact.



Transfer IQOrchestrate

Partner Management

Workflows

Ask Galileo...

M

Partners

Account Onboarding

Accounts

← Add Partner

Cancel

Create

Partner Name *

Rackspace

Check Availability

✓The Partner Name is available

Bucket Name

bft-mft-tiq-aws-staging

Business Unit

Sales

Key Prefix

business-unit-folders/sales/rackspace

Partner Website

https://www.rackspace.com/

Partner Description

provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS Infrastructure.

Contact

Contact Role *

MFT/File Transfer Expert Contact

Contact Name *

John Miller

Email *

john.miller@rackspace.com

Secondary Email

sarah.davis@rackspace.com

Phone

Is Primary?

☒

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TIQ_ORCH_v0.4.1

3. Click the Create button to add the Partner, the newly created partner will then appear in the Partners tab.

Transfer IQOrchestrate

Partner Management

Workflows

Ask Galileo...

M

Partners

Account Onboarding

Accounts

Partners

Select

Search Partner

Search

Add Partner

Count: 1

Partner Name	Business Unit Name	Key Prefix	Contact Name	Contact Email	Updated At	Created By
Rackspace	Sales	business-unit-folders/sales/rackspace/	John Miller	john.miller@rackspace.com	04 Sep 2025 at 04:24 PM	MFT Business User

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TIQ_ORCH_v0.4.1

Business User Initiates Partner Onboarding Request:

After the partner is created, an account must be created for the partner. To do this, the Business User submits an onboarding request specifying the type of account to be created. There are two types of accounts available:

1. **AWS Transfer Family Account**
2. **Partner Hosted Account.**

Once the onboarding request is submitted, it goes to the admin for approval. The account will be created only after the admin claims and creates the account

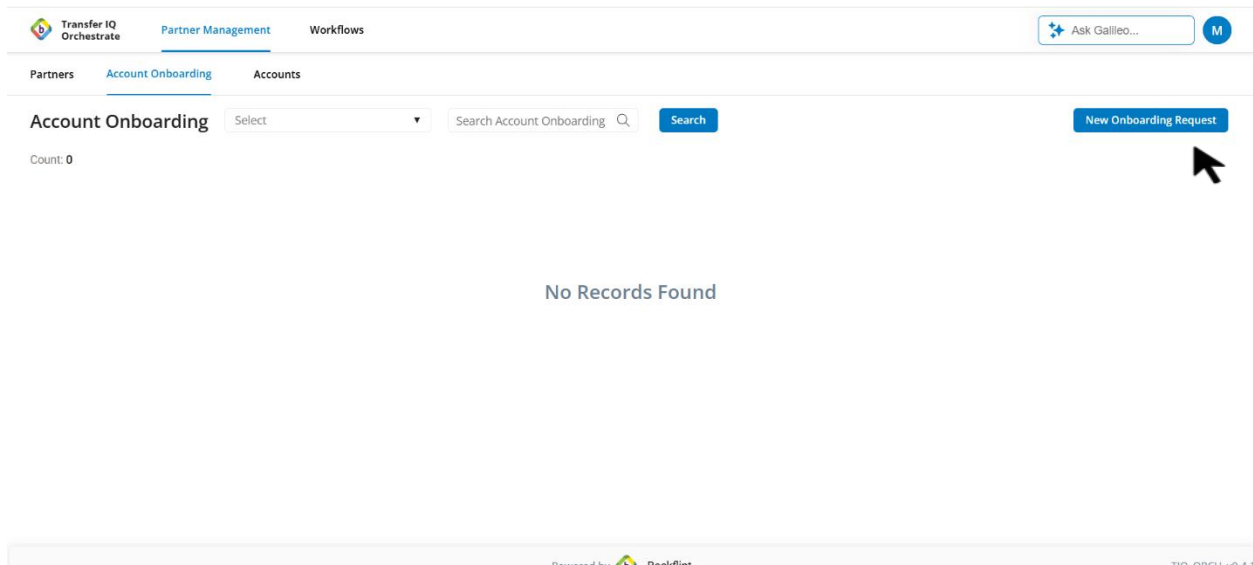
Add Partner Account (AWS Transfer Family Hosted)

Business User Initiates Partner Onboarding Request (Business User Submission to Admin) - AWS Account

When the user clicks the **Account Onboarding** tab and clicks on “**New Onboarding Request**” button, they are redirected to the New Account Onboarding Request Form. In this form, the user sees two fields:

In this form, the user sees three fields:

1. **Environment** (pre-filled with "Model")
2. **Business Unit**, (pre-filled with the business unit which is associated to that Business User)
3. **Partner to Onboard**, which is a dropdown where the user selects the partner profile



Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo... M

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Environment Model

Business Unit Sales

Partner

Partner to Onboard * Select Rackspace

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After selecting the Partner, partner details like Partner website and Partner Description fields are displayed and these cannot be edited, these fields are read-only mode.

Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo... M

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Environment Model

Business Unit Sales

Partner

Partner to Onboard * Rackspace

Partner Website https://www.rackspace.com/

Partner Description Rackspace Technology is a leading AWS Premier Consulting Partner that provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS infrastructure.

Account Type * Select

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Now when **AWS Transfer Family** account is selected, business contact form will be opened, and user has to give all the mandatory details with valid data. If not, an error will appear when attempting to save the request.

Transfer IQ Orchestrator Partner Management Workflows

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Partner to Onboard * Rackspace

Partner Website https://www.rackspace.com/

Partner Description Rackspace Technology is a leading AWS Premier Consulting Partner that provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS infrastructure.

Account Type * AWS Transfer Family Account

Business Contact

Primary user of Account * John Miller

Email * john.miller@rackspace.com

Secondary Email sarah.davis@rackspace.com

Title Sales Operations Specialist

Department Sales Operations

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For AWS Account, only SSH key is supported for login method.

The following fields are displayed when the account type is selected as AWS Transfer Family Account.

1. **Tentative Account Name:** The Business User can provide a tentative account name, which the IIT Admin may use during account creation. This field is optional.
2. **Login Method:** In dropdown only SSH public key will be available.
3. **Certificate type:** For partner to login to the company's server, only SSH key login type is supported.
4. **SSH Public Key:** To log in to the company's server, a partner will share their SSH public key with the Business User. Business Users will upload shared partner's ssh public key.

5. **PGP Encryption for Partner:** Partner will share Partner's PGP Public key to Business User. Business Users will upload shared PGP key provided by the partner. When a company wants to send files to its partner, the company will use partner's PGP public key and encrypt the files and send them to partner the partner uses their PGP private key to decrypt files sent by the company. the files receive partner uses their PGP private key to decrypt files sent by the company. the files received.

Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo...

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Secondary Email sarah.davis@rackspace.com

Title Sales Operations Specialist

Department Sales Operations

Model Environment Connection Setup Download Connection Setup Help Document

Tentative Account Name RackspaceAWSAccount

Login Method * SSH Public Key

Certificate type SSH Key

SSH public key * Upload user-key-rsa-2048-public-key.pub Delete

PGP Encryption for Partner * ☒

Partner PGP Public Key * Upload pgp-encryption-public-key.asc Delete

To send encrypted files to the partner, please upload the partner provided PGP Public Key. Please upload a valid PGP Public Key. (Accepted file types: .asc)

Company PGP Public Key pgp-encryption-public-key.asc

Please share the information shown above with the partner.

Additional Information Rackspace Sales Team would use the SSH private key to connect to the SFTP server using the account approved and provisioned by [Admin], and the Partner PGP Public Key will be used to encrypt the file.

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TIQ_ORCH_v0.4.1

Company PGP Public key:

When a partner wants to send files to a company, the partner will use the company's PGP public key and encrypt the files and send them to the company. To decrypt the files sent by the partner, the company will use the company's PGP private key and decrypt the files received from the partner. This key is auto populated, when the form is filled in by the Business User.

There are two optional fields: **Additional Details** and **File Attachment**. These are not mandatory, but if the Business User wants to share extra information or upload supporting documents for the admin, Business User can use these fields to provide that additional input.

Transfer IQ
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Partner Management

Workflows

Ask Galileo...M

PartnersAccount OnboardingAccounts

← New Account Onboarding Request

CancelSave

Certificate type

SSH Key

SSH public key *

Upload

user-key-rsa-2048-public-key.pub

Delete

PGP Encryption for Partner *

☒

Partner PGP Public Key *

Upload

pgp-encryption-public-key.asc

Delete

Company PGP Public Key

pgp-encryption-public-key.asc

Additional Information

Rackspace Sales Team would use the SSH private key to connect to the SFTP server using the account approved and provisioned by ITAdmin, and the Partner PGP Public Key will be used to encrypt the file.

File Attachment

Upload

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So, Business Users will upload all these above details and submit the form to Admins.

Transfer IQ
Orchestrator

Partner Management

Workflows

Ask Galileo...M

PartnersAccount OnboardingAccounts

Account Onboarding

Select

Search Account Onboarding

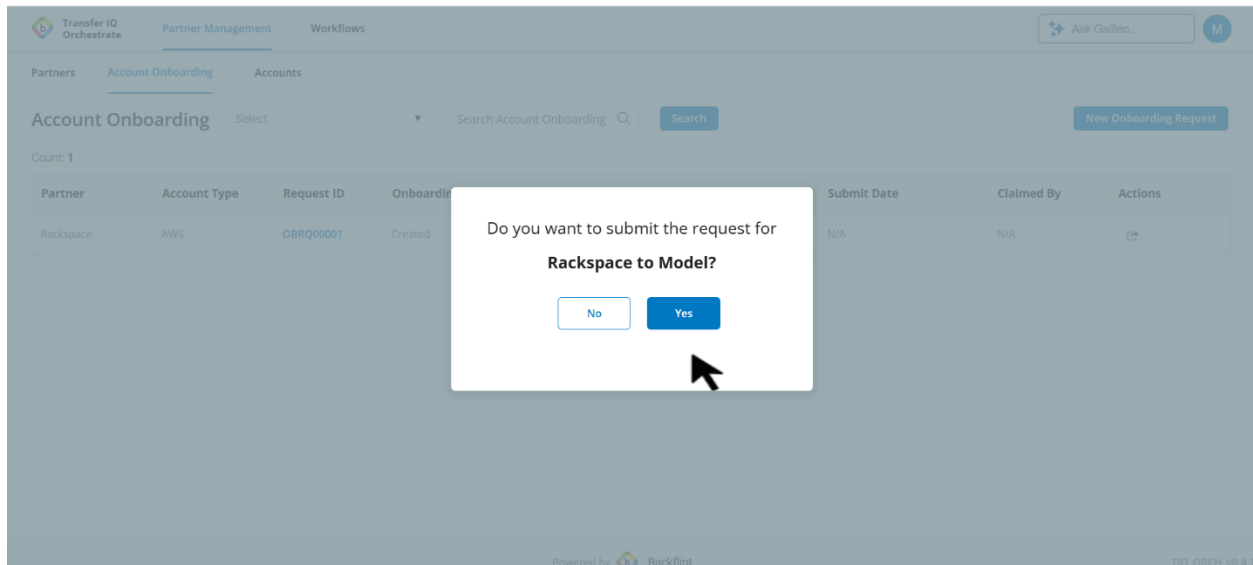
Search

New Onboarding Request

Count: 1

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Submit Date	Claimed By	Actions
Rackspace	AWS	OBRQ00001	Created	Model	MFT Business User	N/A	N/A	

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Admin Approves Partner Onboarding Request and Onboards Partner with AWS Account:

Once the onboarding request is submitted, it becomes visible to all admins under the **Account Onboarding** tab.

- An admin can claim the request to take ownership in one of two ways: by clicking the **View Request** button in the email notification sent after submission, or by locating and claiming the request directly from the **Account Onboarding** tab.

Transfer IQ Orchestrate Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Partners Account Onboarding Accounts

Account Onboarding

Select Search Account Onboarding Search

Count: 1

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	AWS	OBRQ00001	Pending Review	Model	MFT Business User	10 Sep 2025 at 07:04 PM	N/A	

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TIQ_ORCH_v0.4.1

Transfer IQ Orchestrate Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Partners Account Onboarding Accounts

Account Onboarding

Select Search Account Onboarding Search

Count: 1

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	AWS	OBRQ00001	Pending Review	Model	MFT Business User	10 Sep 2025 at 07:04 PM	N/A	

Do you want to claim the request?

OBRQ00001

No Yes

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TIQ_ORCH_v0.4.1

- After claiming the request, the admin can view all the details provided by the Business User in **edit mode**.
- Click the edit mode to open the request in edit mode

Transfer IQ Orchestrator Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Partners Account Onboarding Accounts

Account Onboarding Select Search Account Onboarding Search

Count: 1

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	AWS	OBRQ00001	Claimed	Model	MFT Business User	10 Sep 2025 at 07:07 PM	MFT Super Admin	

Powered by Backflip TIQ_ORCH_v0.4.1

- The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are.

Transfer IQ Orchestrator Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Partners Account Onboarding Accounts

← Rackspace Cancel Update

Business Unit Sales

Partner

Partner to Onboard Rackspace

Partner Website https://www.rackspace.com

Partner Description Rackspace Technology is a leading AWS Premier Consulting Partner that provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS infrastructure.

Account Type AWS

Business Contact

Primary user of Account * John Miller

Email * john.miller@rackspace.com

Secondary Email sarah.davis@rackspace.com

Title Sales Operations Specialist

Department Sales Operations

Model Environment Connection Setup Download Connection Setup Help Document

Tentative Account Name Rackspace RackspaceAWSAccount OBRQ00001 New

Login Method * SSH Public Key

Status: Claimed

- MA MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 07:07 PM
- MU MFT Business Us... | Business User Pending Review 10 Sep 2025 at 07:04 PM
- MU MFT Business Us... | Business User Created 10 Sep 2025 at 07:03 PM

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- Once all the details are correct, there is a section called **IT Admin** to fill out following details which contains the following fields
 - Bucket Name** – Automatically populated based on the bucket name configured in the metadata settings.
 - Server Name** - Automatically populated based on the server name configured in the metadata settings.

- **Account Name** – A unique name manually entered by the admin during account creation.
- **Key Prefix** – Automatically generated in the format: efts-folders/{Account Name}/, where {Account Name} is filled in based on the value entered in the **Account Name** field.
- **Role** – Automatically populated with a predefined role; this field is not editable.

Transfer IQ Orchestrator Partner Management Workflows Business Units Users Configuration Ask Galileo...

Partners **Account Onboarding** Accounts

← **Rackspace** Cancel Update

Certificate type: SSH Key

SSH public key: Upload user-key-rsa-2048-public-key.pub Delete

PGP Encryption for Partner: ☒

Partner PGP Public Key: Upload pgp-encryption-public-key.asc Delete

To send encrypted files to the partner, please upload the partner provided PGP Public Key. Please upload a valid PGP Public Key. (Accepted file types: .asc)

Company PGP Public Key: pgp-encryption-public-key.asc

Please share the information shown above with the partner.

Additional Information: Rackspace Sales Team would use the SSH private key to connect to the SFTP server using the account approved and provisioned by ITAdmin, and the Partner PGP Public Key will be used to encrypt the file.

IT Admin to fill out following details

Please review the details filled by business user and provide the following details to create partner account and servers in Environment

Bucket Name: bft-mft-tiq-tcs-prod

Server Name: tiq-tcs-prod-sftp_server

Account Name: RackspaceAWSAccount Check Availability ✓Account name RackspaceAWSAccount is available.

Key Prefix: efts-folders/rackspaceawsaccount/

This path is created under the bucket "bft-mft-tiq-tcs-prod" and folder name based on the Business Unit.

Role: tiq-tcs-sftp-user-role-1737911528247

Create Account

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TIQ_ORCH_v0.4.1

Status: Claimed

- ✓ MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 07:07 PM
- ✓ MFT Business Us... | Business User Pending Review 10 Sep 2025 at 07:04 PM
- ✓ MFT Business Us... | Business User Created 10 Sep 2025 at 07:03 PM

Upon clicking on the Create Account, the account has been created

Transfer IQ Orchestrator | Partner Management | Workflows | Business Units | Users | Configuration | Ask Galileo

Partners | **Account Onboarding** | **Accounts**

← Rackspace [Cancel] [Update]

Certificate type: SSH Key

SSH public key: Upload user-key-rsa-2048-public-key.pub Delete

PGP Encryption for Partner: ☒

Partner PGP Public Key: Upload pgp-encryption-public-key.asc Delete

To send encrypted files to the partner, please upload the partner provided PGP Public Key. Please upload a valid PGP Public Key. (Accepted file types: .asc)

Company PGP Public Key: pgp-encryptoon-public-key.asc

Please share the information shown above with the partner.

Additional Information: Rackspace Sales Team would use the SSH private key to connect to the SFTP server using the account approved and provisioned by ITAdmin, and the Partner PGP Public Key will be used to encrypt the file.

IT Admin to fill out following details

Please review the details filled by business user and provide the following details to create partner account and servers in Environment

Bucket Name: btf-mft-tiq-tcs-prod

Server Name: tiq-tcs-prod-sftp_server

Account Name: RackspaceAWSAccount

[Check Availability] ✓Account name RackspaceAWSAccount is available.

Key Prefix: efts-folders/rackspaceawsaccount/

This path is created under the bucket "btf-mft-tiq-tcs-prod" and folder name based on the Business Unit.

Role: tiq-tcs-sftp-user-role-1757911528247

[Create Account]

Powered by Backflip

TIQ_ORCH_v0.4.1

Status: Claimed

- MTT Super Admin | Super Admin
Claimed
10 Sep 2025 at 07:07 PM
- MTT Business User | Business User
Pending Review
10 Sep 2025 at 07:04 PM
- MTT Business User | Business User
Created
10 Sep 2025 at 07:03 PM

Email Notification Sent to Business User

Upon creation of the AWS account, the Business User will receive an email notification containing the following details:

Email Subject:

- Account Creation Successful – {Partner Name} – Model

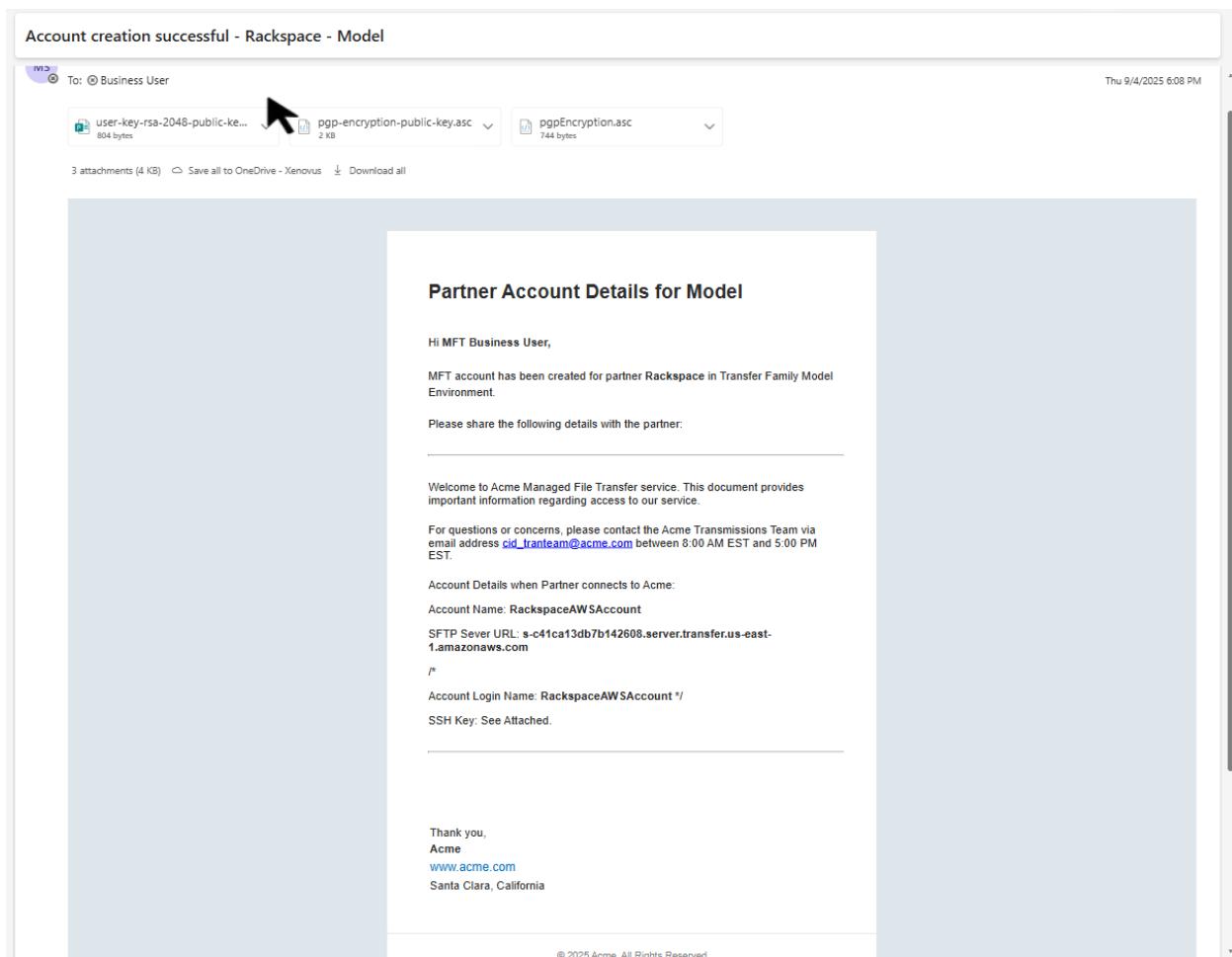
Fields in Email Notification:

- Account Name
- SFTP Server URL
- Account Login Name
- SSH Key (attached)

Additional

- Thank you note
- Company Name and Website
- Company Location
- Support Contact Email and Working Hours
- Welcome note and instructions on service access

In addition, the email will include attachments for the **SSH Public Key** of partner and the **PGP Public Keys** of both the Partner and the Company.



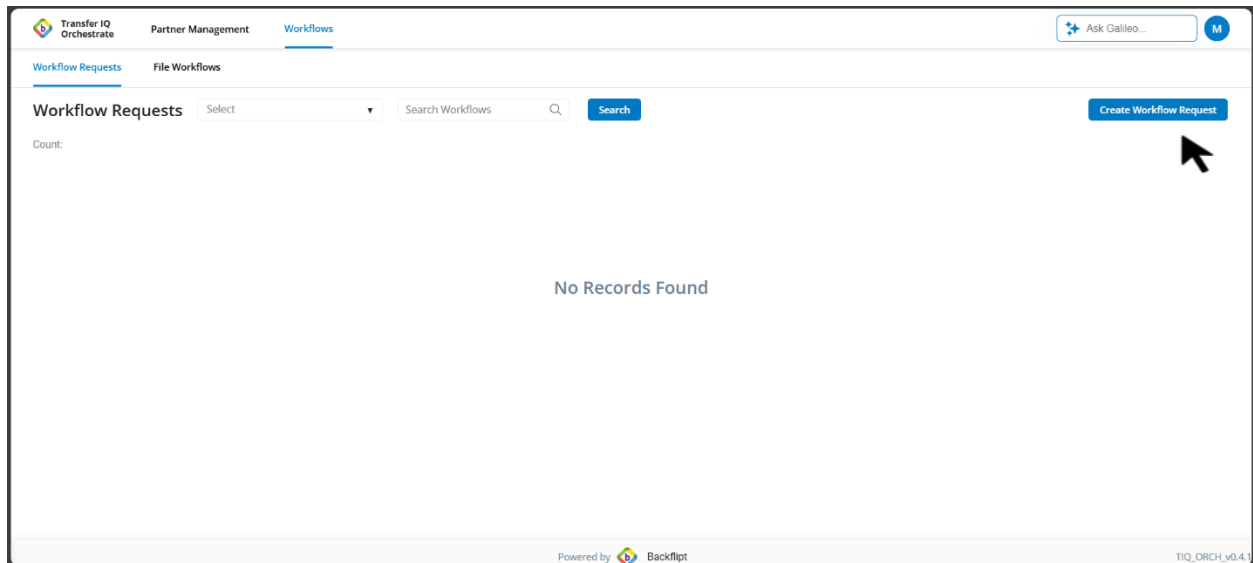
Add AWS Transfer Family Account Workflows

Add AWS Transfer Family Account Inbound Workflow

In the AWS Inbound Workflow, a partner uploads a file in the source path of company's server, the workflow is automatically triggered as soon as the file is placed into the source path. The file is processed through the defined transformation steps and then delivered to the destination specified in the workflow

To Create an AWS Inbound Workflow Business User Creates a Workflow Request with all the required details and submits the workflow request to the admin for approval.

1. Click the Workflows > Workflow Requests tab to view a table displaying the workflow request with the following columns: **Request Id**,
2. To create a new workflow request, click the "Create Workflow Request" button



3. A window will appear with a screen to **Set up a New Workflow** with various sections
 - a. Info
 - b. Source
 - c. Steps
 - d. Destination
 - e. Outcomes
 - f. Review

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

1 Info 2 Source 3 Steps 4 Destination 5 Outcomes 6 Review

Information

Provide the basic information about account and workflow.

Partner and Account Information

Environment * Model

Business Unit Sales

Partner * Select

Account Type * Select

Account * Select

Next >

Workflow Preview

Workflow Visualizer

Configure your workflow to see a visual preview here

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Information (Info)

Provide the basic information about account and workflow in this section

This section contains the following fields

1. Environment – Auto populated with Model
2. Business Unit – Auto populated with the Business Unit assigned to the logged in Business User
3. Partner – A dropdown that consists of list of partners and it allows Business User to select a partner for whom the workflow needs to be created
4. Account Type – AWS Account
5. Partner Account – All the partner accounts created for the partner will be displayed in the dropdown, and allows to select a partner account out of all available options

Once the Partner Account is selected, the Workflow Information section is displayed to provide information about the Workflow with below fields

1. Direction – Select Inbound to create an Inbound Workflow
2. Workflow Name – An input field to Enter a Name for the workflow
3. Description – A file to provide a description about the workflow

Once all the information is given click the **“Next”** button to navigate to the Source Section

Source

The partner uploads the file to the source folder. All information regarding the source and trigger scheduling will be provided in the source section.

The Source Section Consists of the following section:

1. Trigger Configuration

Trigger Configuration:

This section provides details about the source folder and the file name pattern that should trigger the workflow.

The section consists of the following fields:

1. Trigger Type – Pre-filled with the “S3 Upload”
2. Bucket Name – Pre-filled with the “bft-mft-transferiq-qa”
3. Key Prefix – Folder path where the partner uploads the file pre-filled with the path “”
4. File Name Pattern - Specify the file name or pattern that should trigger the workflow.
 - a. You can either enter the **exact file name** (e.g., Sales.pdf) or use **wildcard characters** to define a pattern:
 - b. * — Matches **any number of characters**
 - c. ? — Matches **exactly one character**

d. Examples:

- e. *. * – Triggers the workflow for **any file**, regardless of name or extension
- f. *.csv – Triggers for any file with a .csv extension, such as data.csv or report.csv
- g. "report_*.xlsx" (Excel files starting with "report_")
- h. data_????_*.Json – Triggers for JSON files that follow a specific pattern: the file name must start with data_, followed by **exactly four characters**.
- i. Simply leave blank to trigger for all files

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Source

Configure the source that will trigger this workflow.

Trigger Configuration

Trigger Type: S3 Upload

Bucket Name: s3-efs-dq-to-prod

Key prefix *: efs-folders/rackspaceawsaccount/inbound

File Name Pattern: rackspace-sales-leads*

Use "*" for any characters, "?" for a single character. Leave blank to trigger for all files.

Examples: "*.csv" (all CSV files); "report_*.xlsx" (Excel files starting with "report_"); "data_????_*.json" (JSON files with a specific pattern)

< Previous Next >

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	Inbound

- ✓ **Source**
Folder Path: efs-folders/rackspaceawsaccount/...
- ✓ **scan**
Folder path: business-unit-folders/sales/racksp...
- ✓ **copy**
Folder path: business-unit-folders/sales/racksp...
- ✓ **move**
Folder path: business-unit-folders/sales/racksp...
- 2 **Destination**
Pending

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After providing all mandatory details, click Next to continue to the Steps Section

Steps:

There are different Steps in the PFTS Inbound Workflow. Once the workflow is triggered the all the steps configured in the steps section will be executed and the file will be placed in the destination section:

The Steps Available in The PFTS Inbound Workflows are as follows

Scan - The scan step checks files or directories for potential malware, viruses, or security threats

Transfer IQ Orchestrate Partner Management Workflows

Workflow Requests File Workflows

Setup New Workflow

Cancel

Info Source Steps Destination Outcomes Review

Define the sequence of steps to process the file. You can add and remove steps.

1. Scan

Description: This step checks the incoming file for potential malware, viruses, or security threats. If no threats are detected, the file is moved to the scanned folder.

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount / scanned

Overwrite Existing: ☒

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Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	inbound

Source: Folder Path : efts-folders/rackspaceawsaccount...

scan: Folder path: business-unit-folders/sales/racksp...

Destination: Pending

Copy - The copy step duplicates a file from the source location to the destination without deleting the original. This ensures the file remains accessible in both locations.

Transfer IQ Orchestrate Partner Management Workflows

Workflow Requests File Workflows

Setup New Workflow

Cancel

Info Source Steps Destination Outcomes Review

2. Copy

Description: Copies the file from the scanned folder to the copied folder, keeping the original intact

Source Options: ☒ Apply on the file created from previous step ☐ Apply on the original file

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount / copied

Overwrite Existing: ☐

Powered by Backflit

TIQ_ORCH_v0.4.1

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	inbound

Source: Folder Path : efts-folders/rackspaceawsaccount...

scan: Folder path: business-unit-folders/sales/racksp...

copy: Folder path: business-unit-folders/sales/racksp...

Destination: Pending

Move - The move operation shifts a file from the source location to the destination. Once moved, the file no longer exists in the source location.

Transfer IQ Orchestrate Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

3. Move

Description: Moves the file from the copied folder to the moved folder, deleting it from the source

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount. / moved

Overwrite Existing: ☒

If you are copying files into a folder, specify at the end of the prefix name

Workflow Preview:

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	Inbound

- Source: Folder Path: efts-folders/rackspaceawsaccount...
- scan: Folder path: business-unit-folders/sales/racksp...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- Destination: Pending

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PGP Decrypt - The PGP decrypt step retrieves an encrypted file from the source location, decrypts it using the PGP private key provided in the MFT Settings tab, and places the decrypted file in the specified destination folder.

Transfer IQ Orchestrate Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

4. PGP Decryption

Description: Decrypts the file from the moved folder using the private key and places it in the decrypted folder.

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount. / decrypted

Overwrite Existing: ☒

If you are copying files into a folder, specify at the end of the prefix name

Workflow Preview:

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	Inbound

- Source: Folder Path: efts-folders/rackspaceawsaccount...
- scan: Folder path: business-unit-folders/sales/racksp...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- pgpDecrypt: Folder path: business-unit-folders/sales/racksp...

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Decode - Decode step converts encoded file back to its original, readable format. It is used when a file has been encoded (for example, in Base64) and needs to be returned to its normal form so that it can be used.

The screenshot shows the 'Setup New Workflow' interface with the '5. Decode' step selected. The progress bar indicates steps 1 through 6, with step 5 currently active. The configuration for the 'Decode' step is as follows:

- Description:** Restores the file from encoded form to its original readable format.
- Source Options:**
 - ☒ Apply on the file created from previous step
 - ☐ Apply on the original file
- Encode Type:** BASE64
- Destination Bucket:** bft-mft-tiq-tcs-prod
- Destination Key Prefix:** business-unit-folders/sales/rackspace/rackspaceawsaccount / decoded
- Overwrite Existing:** ☒

The 'Workflow Preview' on the right shows the sequence of steps: Source, scan, copy, move, and pgpDecrypt, each with its respective folder path.

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Decompress - Decompress step extracts and restores the original content from a compressed file, allowing the data to be accessed and used in its original form.

The screenshot shows the 'Setup New Workflow' interface with the '6. Decompress' step selected. The progress bar indicates steps 1 through 6, with step 6 currently active. The configuration for the 'Decompress' step is as follows:

- Description:** Extracts the file from the decoded folder and restores it to its original form in the decompressed folder.
- Source Options:**
 - ☒ Apply on the file created from previous step
 - ☐ Apply on the original file
- Detect Type From Extension:** ☒

Automatically detect the compression type based on the file extension (e.g., .zip, .tar.gz). Uncheck this to manually select a compression type.
- Destination Bucket:** bft-mft-tiq-tcs-prod
- Destination Key Prefix:** business-unit-folders/sales/rackspace/rackspaceawsaccount / decompressed
- Overwrite Existing:** ☒

The 'Workflow Preview' on the right shows the sequence of steps: Source, scan, copy, move, and pgpDecrypt, each with its respective folder path.

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Delete - The **delete step** removes a file from its source permanently. This step is typically used to clean up files after they are no longer needed

Tag - The tag step allows adding additional information to files in the form of key-value pairs. This extra info helps describe, organize, and manage them more effectively. Up to 50 tags can be added per file.

The screenshot shows the 'Setup New Workflow' interface. At the top, there's a navigation bar with 'Transfer IQ Orchestrator', 'Partner Management', and 'Workflows'. Below this, a progress bar indicates the current step is 'Steps' (3), with previous steps 'Info' (1) and 'Source' (2) completed, and future steps 'Destination' (4), 'Outcomes' (5), and 'Review' (6) pending. The main content area is titled '6. Decompress' and '7. Tag'. The 'Tag' step is expanded, showing a description field, source options (radio buttons for 'Apply on the file created from previous step' and 'Apply on the original file'), and a table for tags with columns 'Tag Name' and 'Tag Value'. A mouse cursor is pointing at the 'Description' field. On the right, a 'Workflow Preview' panel shows a list of steps: 'Source', 'scan', 'copy', 'move', and 'pgpDecrypt', each with a folder path. The bottom of the interface shows 'Powered by Backflip' and the version 'TIQ_ORCH_v0.4.1'.

Rename - The **rename step** changes the name of a file. This helps organize files by giving them clear, consistent, or updated names without altering their content or location.

The screenshot shows the 'Setup New Workflow' interface with step 8 'Rename' selected. The progress bar now shows 'Steps' (3) as the current step, with 'Info' (1) and 'Source' (2) completed, and 'Destination' (4), 'Outcomes' (5), and 'Review' (6) pending. The 'Rename' step is expanded, showing a description field, source options (radio buttons for 'Apply on the file created from previous step' and 'Apply on the original file'), a 'New File Name' field, and a checkbox for 'Time stamp in Filename' which is checked. A mouse cursor is pointing at the 'Description' field. The 'Workflow Preview' panel on the right shows a list of steps: 'decode', 'decompress', 'tag', and 'rename', each with a folder path or key value. The bottom of the interface shows 'Powered by Backflip' and the version 'TIQ_ORCH_v0.4.1'.

For all the above steps there are toggling bar and delete icon

- Disabled steps will be ignored during workflow execution
- Caret symbols (^) and (v) are displayed for each step, allowing the user to expand or collapse the steps as needed.

The fields available after adding Copy, Move, Decrypt, Scan, Decompress and Decode steps are listed below.

- **Description** – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name:** Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “bft-mft-transferiq-qa”)
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., “Business Unit Folder/ {Business Unit}/{Partner}/ {Partner Account}”).
- In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the key prefix path plus the custom folder entered, determining exactly where the file will be stored when the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

The fields available after adding **Delete**, **Rename** and **Tag** steps are listed below.

- **Description** – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name:** Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “bft-mft-transferiq-qa”)
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten

Note: Since no destination key prefix is provided, the rename and tag will be applied to the path or folder from the previous step.

Destination:

1. Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “bft-mft-transferiq-qa”)

2. Key Prefix – The folder path where the uploaded files will be placed in the destination. (e.g., “{{Business Unit Folder}}/ {Business Unit}/{Partner}/ {Partner Account}}/{Direction}} ”)

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Destination

Configure where processed files will be delivered.

Bucket Name: bft-mft-tiq-tcs-prod

Key prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount/inbound

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	Inbound

- Source: Folder Path: efts-folders/rackspaceawsaccount...
- scan: Folder path: business-unit-folders/sales/racksp...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- pgpDecrypt: Folder path: business-unit-folders/sales/racksp...

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Outcomes Section

The Outcomes section consists of two tabs:

1. On Success
2. On Failure.

On Success – Notify the email entered upon successful file transfer.

On Failure – Notify the email entered if the file transfer fails.

Note: Enter Comma Separated Emails to notify multiple emails

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Outcome Actions
Define actions to take when the workflow succeeds or fails.

On Failure On Success

Send Email
Email ID's (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

Email id's should be separated by comma (,)

< Previous Next >

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Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	inbound

- ✓ **Source**
Folder Path : efts-folders/rackspaceawsaccoun...
- ✓ **scan**
Folder path: business-unit-folders/sales/racksp...
- ✓ **copy**
Folder path: business-unit-folders/sales/racksp...
- ✓ **move**
Folder path: business-unit-folders/sales/racksp...
- ✓ **pgpDecrypt**
Folder path: business-unit-folders/sales/racksp...

Review

Review all the details provided during the workflow request creation. If everything is correct, the Business User can proceed to create the workflow request. If any changes are needed, use the Previous button to go back and make edits

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Bucket Name
bft-mft-tiq-tcs-prod

Key prefix
business-unit-folders/sales/rackspace/rackspaceawsaccount/inbound

Outcomes Actions

On Failure

Send Email

Email Address (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

On Success

Send Email

Email Address (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

< Previous Create

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TIQ_ORCH_v0.4.1

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	inbound

- ✓ **Source**
Folder Path : efts-folders/rackspaceawsaccoun...
- ✓ **scan**
Folder path: business-unit-folders/sales/racksp...
- ✓ **copy**
Folder path: business-unit-folders/sales/racksp...
- ✓ **move**
Folder path: business-unit-folders/sales/racksp...
- ✓ **pgpDecrypt**
Folder path: business-unit-folders/sales/racksp...

Once the workflow request creation is done, Business User submits the request to the admin for approval, it becomes visible to all admins under the Workflow Requests tab.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

Count: 1

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00001	Partner Upload to ...	Rackspace	inbound	Model	Request...	MFT Business ...			AWS	

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Do you want to submit the request
WR00001 to Model?

No Yes

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Admin Approval – AWS Inbound Workflow request

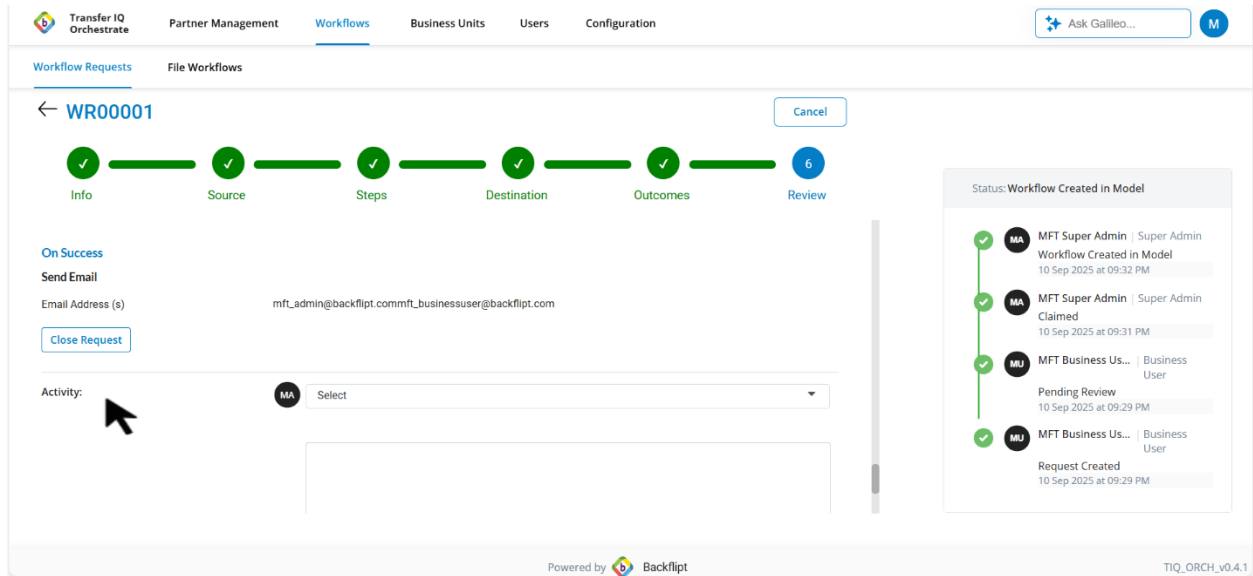
An admin can claim the request to take ownership in one of two ways: by clicking the View Request button in the email notification sent after submission, or by locating and claiming the request directly from the Account Onboarding tab.

<div> <div>Transfer IQ Orchestrator</div> <div>Partner Management</div> <div>Workflows</div> <div>Business Units</div> <div>Users</div> <div>Configuration</div> </div> <div>Ask Galileo...</div> <div>M</div>										
<div>Workflow Requests</div> <div>File Workflows</div>										
<div>Count: 2</div>										
Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Workflow...	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	 
WR00002	Partner Download fr...	Rackspace	outbound	Model	Request ...	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	 

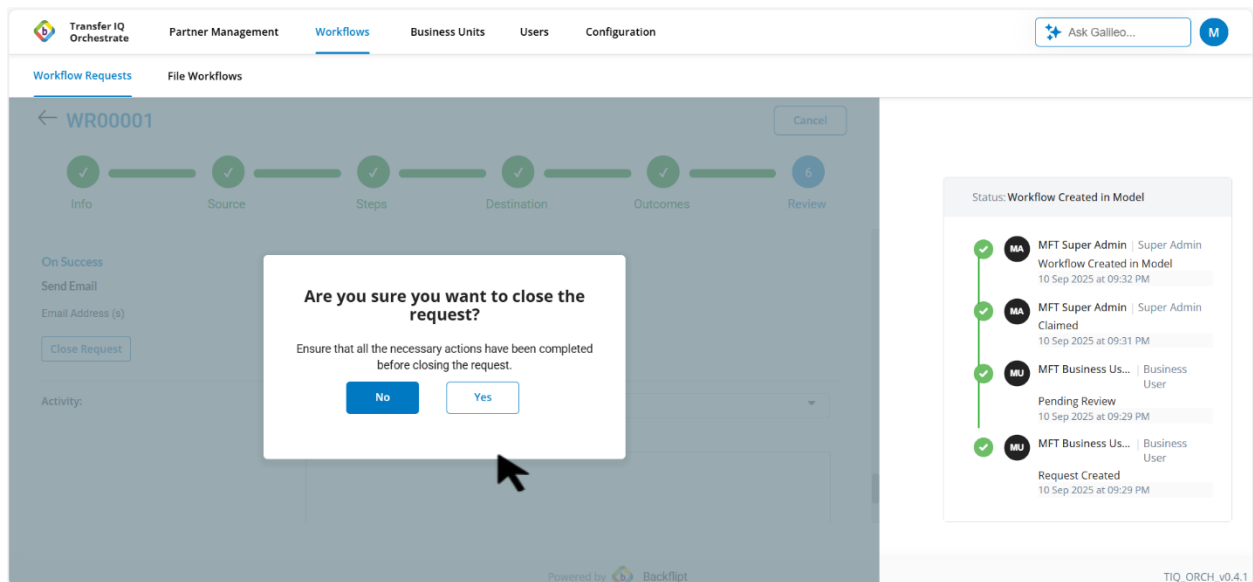
After claiming the request, the admin can view all the details provided by the Business User in edit mode. The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are.

Click the Create button to create the workflow

<div>Transfer IQ Orchestrator</div> <div>Partner Management</div> <div>Workflows</div> <div>Business Units</div> <div>Users</div> <div>Configuration</div>		<div>Ask Galileo...</div> <div>M</div>
<div>Workflow Requests</div> <div>File Workflows</div>		
<div> <div>← WR00001</div> <div>Cancel</div> </div> <div> <div>Info</div> <div>Source</div> <div>Steps</div> <div>Destination</div> <div>Outcomes</div> <div>Review</div> </div> <div> <div>On Failure</div> <div>Send Email</div> <div>Email Address (s)</div> <div>mft_admin@backflpt.com, mft_businessuser@backflpt.com</div> </div> <div> <div>On Success</div> <div>Send Email</div> <div>Email Address (s)</div> <div>mft_admin@backflpt.com, mft_businessuser@backflpt.com</div> </div> <div> <div>Activity:</div> <div>MA Select</div> </div> <div> <div>Previous</div> <div>Create</div> </div>		
<div> <div>Status: Claimed</div> <div> <div>MA MFT Super Admin Super Admin</div> <div>Claimed</div> <div>10 Sep 2025 at 09:31 PM</div> </div> <div> <div>MLJ MFT Business Us... Business User</div> <div>Pending Review</div> <div>10 Sep 2025 at 09:29 PM</div> </div> <div> <div>MLJ MFT Business Us... Business User</div> <div>Request Created</div> <div>10 Sep 2025 at 09:29 PM</div> </div> </div>		



After the workflow is created, the admin can proceed to close the request, so no further action is required. Clicking on the **Close Request** button triggers a confirmation prompt.



Once confirmed, the request is marked as **Closed**, and the page redirects back to the Workflow Requests table, where the request is now listed with a status of **Closed**.

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	
WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

Add AWS Transfer Family Account Outbound Workflow

In the AWS Outbound Workflow, when a Business User from the company uploads a file to the specified source path, the workflow is automatically triggered. The file is processed through the defined transformation steps and then delivered to the destination specified in the workflow request.

To Create an AWS Inbound Workflow Business User Creates a Workflow Request with all the required details and submits the workflow request to the admin for approval.

Information (Info)

Provide the basic information about account and workflow in this section

This section contains the following fields

1. Environment – Auto populated with Model
2. Business Unit – Auto populated with the Business Unit assigned to the logged in Business User
3. Partner – A dropdown that consists of list of partners and it allows Business User to select a partner for whom the workflow needs to be created
4. Account Type – AWS Account
5. Partner Account – All the partner accounts created for the partner will be displayed in the dropdown, and allows to select a partner account out of all available options

Once the Partner Account is selected, the Workflow Information section is displayed to provide information about the Workflow with below fields

1. Direction – Select Outbound to create an Inbound Workflow
2. Workflow Name – An input field to Enter a Name for the workflow
3. Description – A field to provide a description about the workflow

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

1 Info 2 Source 3 Steps 4 Destination 5 Outcomes 6 Review

Business Unit: Sales

Partner: Rackspace

Account Type: AWS Transfer Family Account

Account: RackspaceAWSAccount

Workflow Information

Direction: Outbound

Workflow Name: Partner Download from Company SFTP

Description: This workflow processes Rackspace opportunities files by passing them through 7 transformation steps: Copy, Move, Compress, Encode, PGP Encryption, Tag, and Rename, ensuring secure and standardized outbound delivery.

Next

Workflow Preview

Workflow Visualizer

Configure your workflow to see a visual preview here

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Once all the information is done click the **"Next"** button to navigate to the Source Section

Source

The partner uploads the file to the source folder. All information regarding the source and trigger scheduling will be provided in the source section.

The Source Section Consists of the following section:

1. Trigger Configuration

Trigger Configuration:

This section provides details about the source folder and the file name pattern that should trigger the workflow.

The section consists of the following fields:

1. **Trigger Type** – Pre-filled with the “S3 Upload”
2. **Bucket Name** – Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “**bft-mft-transferiq-qa**”)
3. **Key Prefix** – Folder path where the partner uploads the file pre-filled with the path “{{{Business Unit Folder}}/{Business Unit}/{Partner}/{Partner Account}/{Direction}}”
4. **File Name Pattern** - Specify the file name or pattern that should trigger the workflow.
 - a. You can either enter the **exact file name** (e.g., Sales.pdf) or use **wildcard characters** to define a pattern:
 - b. * — Matches **any number of characters**
 - c. ? — Matches **exactly one character**
 - d. **Examples:**
 - e. *. * – Triggers the workflow for **any file**, regardless of name or extension
 - f. *.csv – Triggers for any file with a .csv extension, such as data.csv or report.csv
 - g. "report_*.xlsx" (Excel files starting with "report_")
 - h. data_????_*.json – Triggers for JSON files that follow a specific pattern: the file name must start with data_, followed by **exactly four characters**.
 - i. Simply leave blank to trigger for all files

Transfer IQ Orchestrator | Partner Management | Workflows

Workflow Requests | File Workflows

← Setup New Workflow

Cancel

1 Info | 2 Source | 3 Steps | 4 Destination | 5 Outcomes | 6 Review

Source

Configure the source that will trigger this workflow.

Trigger Configuration

Trigger Type: S3 Upload

Bucket Name: bft-mft-tiq-tcs-prod

Key prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount/outbound

File Name Pattern: aws-ace-opportunities*

Use "*" for any characters, "?" for a single character. Leave blank to trigger for all files.

Examples: "*.csv" (all CSV files), "report_*.xlsx" (Excel files starting with "report_"), "data_????_*.json" (JSON files with a specific pattern)

< Previous | Next >

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound

- ✓ Source
Folder Path: business-unit-folders/sales/racks...
- ✓ copy
Folder path: business-unit-folders/sales/racksp...
- ✓ move
Folder path: business-unit-folders/sales/racksp...
- ✓ compress
Type: ---, Folder path: business-unit-folders/sa...
- ⌚ Destination
Pending

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TIQ_ORCH_v0.4.1

After providing all mandatory details, click Next to continue to the Steps Section

Steps:

There are different Steps in the EFTS Outbound Workflow. Once the workflow is triggered the all the steps configured in the steps section will be executed and the file will be placed in the destination section:

The Steps Available in The EFTS Outbound Workflows are as follows

Copy - The copy step duplicates a file from the source location to the destination without deleting the original. This ensures the file remains accessible in both locations.

Setup New Workflow

Workflow Requests | File Workflows

Cancel

Info | Source | **Steps** | Destination | Outcomes | Review

Transformation Steps

Define the sequence of steps to process the file. You can add and remove steps.

1. Copy

Description: Copies the file from the source folder to the copied folder, keeping the original intact

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount / copied

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound

Source: Folder Path: business-unit-folders/sales/racks...

copy: Folder path: business-unit-folders/sales/racksp...

move: Folder path: business-unit-folders/sales/racksp...

compress: Type: ---, Folder path: business-unit-folders/sa...

Destination: Pending

Move - The move operation shifts a file from the source location to the destination. Once moved, the file no longer exists in the source location.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

2. Move

Description: Moves the file from the copied folder to the moved folder, deleting it from the source

Source Options: ☒ Apply on the file created from previous step ☐ Apply on the original file

Destination Bucket: bft-rft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount / moved

Overwrite Existing: ☒

Workflow Preview:

- Source: Folder Path: business-unit-folders/sales/racks...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- compress: Type: ---, Folder path: business-unit-folders/sa...
- Destination Pending

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Compress:

Compression reduces the overall size of a file or folder by applying algorithms that represent the same data more efficiently. This helps save storage space and improves transfer speed over networks. Common compressed formats include .zip, .tar, and .gz. Compression can be either **lossless**, where no data is lost, or **lossy**, where some data is discarded to achieve higher reduction.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

3. Compress

Description: Reduces the file size by encoding it into a compressed format (e.g., zip, tar, gz)

Source Options: ☒ Apply on the file created from previous step ☐ Apply on the original file

Compression Type: Zip

Level: Fast

Destination Bucket: bft-rft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspaceawsaccount / compressed

Overwrite Existing: ☒

Workflow Preview:

- Source: Folder Path: business-unit-folders/sales/racks...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- compress: Type: ---, Folder path: business-unit-folders/sa...
- Destination Pending

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Encode:

Encoding transforms data from one representation to another to ensure compatibility, integrity, or security during storage or transmission. For example, **Base64 encoding** converts binary data into text characters so it can be safely transmitted in systems that

only support text. While encoding preserves the original information, it usually increases file size and is not intended for data compression.

The screenshot shows the 'Setup New Workflow' interface in the Transfer IQ Orchestrator. The workflow is at Step 4, 'Encode'. The progress bar shows steps 1 (Info), 2 (Source), 3 (Steps), 4 (Destination), 5 (Outcomes), and 6 (Review). The 'Encode' step is active, with a description: 'Converts the file into Base64 format for safe transmission or storage.' The 'Source Options' are set to 'Apply on the file created from previous step'. The 'Encode Type' is 'BASE64'. The 'Destination Bucket' is 'bft-mft-tiq-tcs-prod'. The 'Destination Key Prefix' is 'business-unit-folders/sales/rackspace/rackspaceawsaccount' followed by 'encoded'. The 'Overwrite Existing' checkbox is checked. The 'Workflow Preview' on the right shows the sequence of steps: Source, copy, move, compress, encode, and Destination. The 'Partner' is 'Rackspace', 'Account' is 'RackspaceAWSAccount', 'Account Type' is 'AWS', and 'Direction' is 'outbound'.

Encrypt:

Encryption is the process of converting readable data (plaintext) into an unreadable format (ciphertext) to protect it from unauthorized access. In the context of **PGP (Pretty Good Privacy) encryption**, a file from the source location is encrypted using the recipient's **public key**. Once encrypted, only the corresponding **private key** can decrypt and access the file. The encrypted file is then moved to the specified destination, ensuring secure transmission and storage. Encryption does not reduce file size but focuses on **data confidentiality and security**.

The screenshot shows the 'Setup New Workflow' interface in the Transfer IQ Orchestrator, now at Step 5, 'PGP Encryption'. The progress bar shows steps 1 (Info), 2 (Source), 3 (Steps), 4 (Destination), 5 (Outcomes), and 6 (Review). The 'PGP Encryption' step is active, with a description: 'Encrypts the file using the public key and stores it in the destination folder.' The 'Source Options' are set to 'Apply on the file created from previous step'. The 'Destination Bucket' is 'bft-mft-tiq-tcs-prod'. The 'Destination Key Prefix' is 'business-unit-folders/sales/rackspace/rackspaceawsaccount' followed by 'encrypted'. The 'Overwrite Existing' checkbox is checked. The 'Workflow Preview' on the right shows the sequence of steps: Source, copy, move, compress, encode, and pgpEncrypt. The 'Partner' is 'Rackspace', 'Account' is 'RackspaceAWSAccount', 'Account Type' is 'AWS', and 'Direction' is 'outbound'.

Delete - The **delete step** removes a file from its source permanently. This step is typically used to clean up files after they are no longer needed

Tag - The tag step allows adding additional information to files in the form of key-value pairs. This extra info helps describe, organize, and manage them more effectively. Up to 50 tags can be added per file.

The screenshot shows the 'Setup New Workflow' interface in the Transfer IQ Orchestrator. The workflow is currently at step 6, 'Tag'. The progress bar shows steps 1 through 6, with step 6 being the active step. The 'Tag' step configuration includes a description field, source options (Apply on the file created from previous step or Apply on the original file), and a table for adding tags. The 'Workflow Preview' on the right shows the current workflow steps: move, compress, encode, pgpEncrypt, and tag. The 'tag' step is highlighted with a key-value pair: key:Category value:Opportunities.

Tag Name	Tag Value
Category	Opportunities

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound
move	Folder path: business-unit-folders/sales/racksp...
compress	Type: ZIP, Folder path: business-unit-folders/sa...
encode	Type: BASE64, Folder path: business-unit-fold...
pgpEncrypt	Folder path: business-unit-folders/sales/racksp...
tag	key:Category value:Opportunities

Rename - The **rename step** changes the name of a file. This helps organize files by giving them clear, consistent, or updated names without altering their content or location.

The screenshot shows the 'Setup New Workflow' interface in the Transfer IQ Orchestrator. The workflow is currently at step 7, 'Rename'. The progress bar shows steps 1 through 7, with step 7 being the active step. The 'Rename' step configuration includes a description field, source options (Apply on the file created from previous step or Apply on the original file), a new file name field, and a checkbox for 'Time stamp in Filename'. The 'Workflow Preview' on the right shows the current workflow steps: Source, copy, move, compress, encode, and pgpEncrypt. The 'Source' step is highlighted with a folder path: business-unit-folders/sales/racks...

Source	Folder Path : business-unit-folders/sales/racks...
copy	Folder path: business-unit-folders/sales/racksp...
move	Folder path: business-unit-folders/sales/racksp...
compress	Type: ZIP, Folder path: business-unit-folders/sa...
encode	Type: BASE64, Folder path: business-unit-fold...
pgpEncrypt	Folder path: business-unit-folders/sales/racksp...

For all the above steps there are toggling bar

- Disabled steps will be ignored during workflow execution

- Caret symbols (^) and (v) are displayed for each step, allowing the user to expand or collapse the steps as needed.

The fields available after adding **Copy, Move, Encrypt, Compress** and **Encode** steps are listed below.

- **Description** – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name:** Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “bft-mft-transferiq-qa”)
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}).
- In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the key prefix path plus the custom folder entered, determining exactly where the file will be stored when the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

The fields available after adding **Delete, Rename** and **Tag** steps are listed below.

- **Description** – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name:** The name of the storage bucket configured in metadata settings.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten

Note: Since no destination key prefix is provided, the rename and tag will be applied to the path or folder from the previous step.

Destination:

1. **Bucket Name** - Pre-filled with the name of the storage bucket configured in metadata settings (e.g., “**bft-mft-transferiq-qa**”)
2. **Key Prefix** – The folder path where the uploaded files will be placed in the destination. (e.g., “{{EFTS-Folder}}/ {Partner Account}}/{Direction}} ”)

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Destination
Configure where processed files will be delivered.

Bucket Name bft-mft-tiq-tcs-prod

Key prefix efts-folders/rackspaceawsaccount/outbound

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound

- Source Folder Path: business-unit-folders/sales/racks...
- copy Folder path: business-unit-folders/sales/racksp...
- move Folder path: business-unit-folders/sales/racksp...
- compress Type: ZIP, Folder path: business-unit-folders/sa...
- encode Type: BASE64, Folder path: business-unit-fold...
- pgpEncrypt Folder path: business-unit-folders/sales/racksp...

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Outcome Actions:

Users can add email addresses in both the ‘**On Success**’ and ‘**On Failure**’ tabs. When the workflow completes, the specified recipients will receive notifications indicating whether the workflow execution was successful or failed

Transfer IQ Orchestrator

Partner Management
Workflows

Ask Galileo...
M

Workflow Requests
File Workflows

← Setup New Workflow
Cancel

✓

✓

✓

✓

5

6

Info
Source
Steps
Destination
Outcomes
Review

Outcome Actions

Define actions to take when the workflow succeeds or fails.

On Failure
On Success

Send Email

Email ID's
mft_businessuser@backflpt.com,mft_admin@backflpt.com

Email ID's should be seperated by comma (,)

< Previous

Next >

Workflow Preview

Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound

- ✓ **Source**
Folder Path : business-unit-folders/sales/racks...
- ✓ **copy**
Folder path: business-unit-folders/sales/racksp...
- ✓ **move**
Folder path: business-unit-folders/sales/racksp...
- ✓ **compress**
Type: ZIP, Folder path: business-unit-folders/sa...
- ✓ **encode**
Type: BASE64, Folder path: business-unit-fold...
- ✓ **pgpEncrypt**
Folder path: business-unit-folders/sales/racksp...

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Review Section:

In View mode, all workflow details and configured steps up to the then displayed, enabling the user to thoroughly review the configuration prior to creating the workflow

Transfer IQ Orchestrator

Partner Management
Workflows

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Workflow Requests
File Workflows

← Setup New Workflow
Cancel

✓

✓

✓

✓

✓

6

Info
Source
Steps
Destination
Outcomes
Review

Destination

Bucket Name	btf-mft-tiq-tcs-prod
Key prefix	efs-folders/rackspaceawsaccount/outbound

Outcomes Actions

On Failure
On Success

Send Email

Email Address (s)
mft_admin@backflpt.com, mft_businessuser@backflpt.com

Send Email

Email Address (s)
mft_admin@backflpt.com, mft_businessuser@backflpt.com

< Previous

Create

Workflow Preview

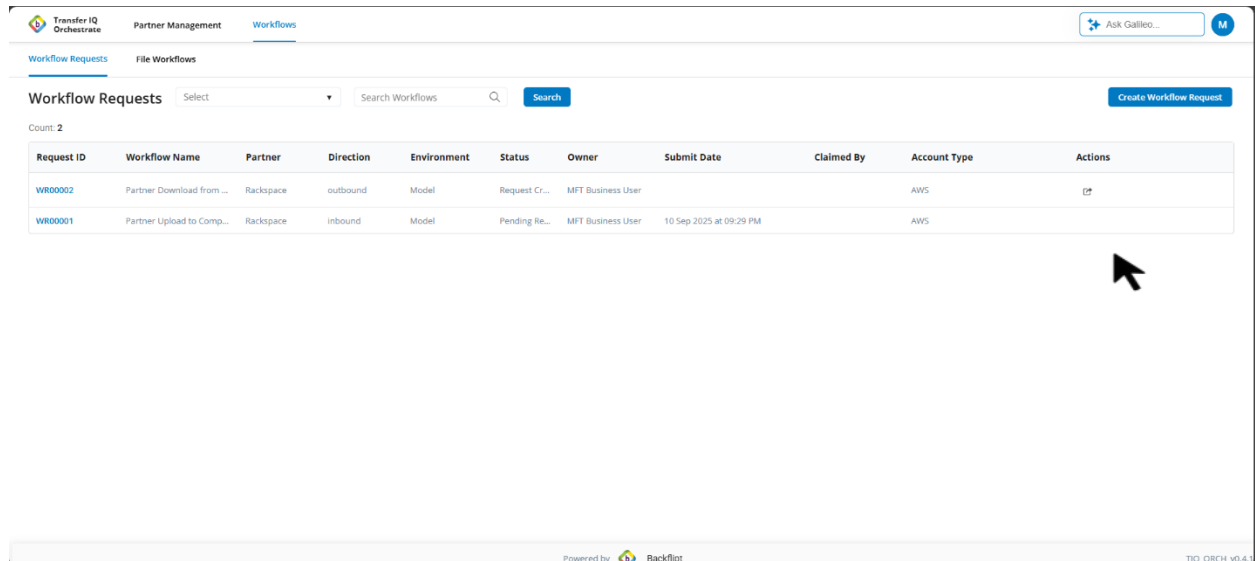
Partner	Rackspace
Account	RackspaceAWSAccount
Account Type	AWS
Direction	outbound


- ✓ **Source**
Folder Path : business-unit-folders/sales/racks...
- ✓ **copy**
Folder path: business-unit-folders/sales/racksp...
- ✓ **move**
Folder path: business-unit-folders/sales/racksp...
- ✓ **compress**
Type: ZIP, Folder path: business-unit-folders/sa...
- ✓ **encode**
Type: BASE64, Folder path: business-unit-fold...
- ✓ **pgpEncrypt**
Folder path: business-unit-folders/sales/racksp...

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TIQ_ORCH_v0.4.1

Once the workflow request creation is done, Business User submits the request to the admin for approval



Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00002	Partner Download from ...	Rackspace	outbound	Model	Request Cr...	MTT Business User			AWS	
WR00001	Partner Upload to Comp...	Rackspace	inbound	Model	Pending Re...	MTT Business User	10 Sep 2025 at 09:29 PM		AWS	

It becomes visible to all admins under the Workflow Requests tab.

Admin Approval – AWS Outbound Workflow request

An admin can claim the request to take ownership in one of two ways: by clicking the View Request button in the email notification sent after submission, or by locating and claiming the request directly from the Account Onboarding tab.

After claiming the request, the admin can view all the details provided by the Business User in edit mode. The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are.

Click the Create button to create the workflow

Transfer IQ Orchestrate Partner Management Workflows Business Units Users Configuration

Workflow Requests File Workflows

← WR00002 Cancel

Info Source Steps Destination Outcomes Review

Outcomes Actions

On Failure

Send Email

Email Address (s) mft_admin@backflpt.com, mft_businessuser@backflpt.com

On Success

Send Email

Email Address (s) mft_admin@backflpt.com, mft_businessuser@backflpt.com

Activity: MA Select

Previous Create

Status: Claimed

- MA MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 09:31 PM
- MU MFT Business Us... | Business User Pending Review 10 Sep 2025 at 09:30 PM
- MU MFT Business Us... | Business User Request Created 10 Sep 2025 at 09:29 PM

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After the workflow is created, the admin can proceed to close the request, as no further action is required. Clicking on the **Close Request** button triggers a confirmation prompt. Once confirmed, the request is marked as **Closed**, and the page redirects back to the Workflow Requests table, where the request is now listed with a status of **Closed**.

Transfer IQ Orchestrate Partner Management Workflows Business Units Users Configuration

Workflow Requests File Workflows

← WR00002 Cancel

Info Source Steps Destination Outcomes Review

Bucket Name bft-mft-tiq-aws-staging

Key prefix efts-folders/rackspaceawsaccount/outbound

Outcomes Actions

On Failure

Send Email

Email Address (s)

On Success

Send Email

Email Address (s) mft_businessuser@backflpt.com, mft_admin@backflpt.com

Close Request

Are you sure you want to close the request?



Ensure that all the necessary actions have been completed before closing the request.

No Yes

Status: Workflow Created in Model

- MA MFT Admin | Super Admin Workflow Created in Model 04 Sep 2025 at 10:47 PM
- MA MFT Admin | Super Admin Claimed 04 Sep 2025 at 10:43 PM
- MU MFT Business Us... | Business User Pending Review 04 Sep 2025 at 10:41 PM
- MU MFT Business Us... | Business User Request Created 04 Sep 2025 at 10:40 PM

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<div> <div>Transfer IQ Orchestrate</div> <div>Partner Management</div> <div>Workflows</div> <div>Business Units</div> <div>Users</div> <div>Configuration</div> </div> <div>Ask Galileo...</div> <div>M</div>										
<div>Workflow Requests</div> <div>File Workflows</div>										
<div>Workflow Requests</div> <div>Select</div> <div>Search Workflows</div> <div>Search</div>										
Count: 2										
Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00002	Partner Download fro...	Rackspace	outbound	Model	Closed	MFT Business User	10 Sep 2025 at 09:30 PM	MFT Super Admin	AWS	
WR00001	Partner Upload to Com...	Rackspace	inbound	Model	Workflow ...	MFT Business User	10 Sep 2025 at 09:29 PM	MFT Super Admin	AWS	 

Add Partner Account (Partner SFTP Hosted)

Business User Initiates Partner Onboarding Request (Business User Submission to Admin)- Partner Account

In the **Partner Hosted Account** type, the partner provides details of partner's own SFTP server where the account exists. Using this information, an account is created in the application to connect to the partner's external SFTP server through **AWS SFTP Connectors**.

While creating the connector, two login methods can be used for authentication:

1. **Password**
2. **SSH Key.**

In the password-based login method, the partner provides a username and password for partner's SFTP server. The company uses these credentials to access the partner's server.

In SSH key-based login method, the company generates a pair of SSH keys consisting of a **public key** and a **private key**, which are stored in the **MFT Settings** tab of the application. The **public key** is shared with the partner. The partner attaches this public key to the relevant user account on partner's SFTP server to allow key-based authentication.

To connect to the partner's server, the company uses the company's **private key** that matches the shared public key.

Partner Hosted Account

To Create a Partner Hosted Account with Password Login Type, Business Users click the **Account Onboarding** tab and click on “**New Onboarding Request**” button, they are redirected to the New Account Onboarding Request Form. In this form, the user sees two fields:

- **Environment** (pre-filled with "Model")
- **Business Unit**, (pre-filled with the business unit which is associated to that Business User)
- **Partner to Onboard**, which is a dropdown where the user selects the partner profile

The screenshot shows the 'New Account Onboarding Request' form within the Transfer IQ Orchestrator application. The top navigation bar includes 'Transfer IQ Orchestrator', 'Partner Management', and 'Workflows'. A search bar with 'Ask Galileo...' and a user profile icon 'M' are on the right. Below the navigation, there are tabs for 'Partners', 'Account Onboarding', and 'Accounts'. The main heading is '← New Account Onboarding Request' with 'Cancel' and 'Save' buttons. The form fields are: 'Environment' (pre-filled with 'Model'), 'Business Unit' (pre-filled with 'Sales'), and 'Partner' (a dropdown menu labeled 'Partner to Onboard *' with 'Select' and 'Rackspace' options). A mouse cursor points to the 'Rackspace' option. The footer shows 'Powered by Backflipit' and 'TIQ_ORCH_v0.4.1'.

1. After selecting the Partner, partner details like Partner website and Partner Description fields are displayed and these cannot be edited, these fields are read-only mode.

Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo... M

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Environment Model

Business Unit Sales

Partner

Partner to Onboard * Rackspace

Partner Website https://www.rackspace.com/

Partner Description Rackspace Technology is a leading AWS Premier Consulting Partner that provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS infrastructure.

Account Type * Select

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2. Once the account type is selected, the **Business Contact Form** is displayed. The Business User must fill in all mandatory fields with valid data. If any required information is missing or incorrect, an error message will appear when attempting to save the onboarding request.

Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo... M

Partners Account Onboarding Accounts

← New Account Onboarding Request Cancel Save

Partner Website https://www.rackspace.com

Partner Description Rackspace Technology is a leading AWS Premier Consulting Partner that provides managed cloud services. They help organizations migrate to AWS, modernize applications, and optimize cloud operations. Rackspace offers end-to-end cloud lifecycle support—including strategy, architecture, migration, security, and ongoing managed services—so businesses can focus on innovation while Rackspace manages AWS infrastructure.

Account Type * Partner Hosted Account

Business Contact

Primary user of Account * John Miller

Email * john.miller@rackspace.com

Secondary Email sarah.davis@rackspace.com

Title Sales Operations Specialist

Department Sales Operations

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3. **Tentative Account Name:** To give any account name, The Business User may suggest an account name. The IT Admin may use this name when creating the account by the Business User. This field is not mandatory

Partner Management
Workflows

Partners
Account Onboarding
Accounts

← New Account Onboarding Request
Cancel
Save

Model Environment Connection Setup

[Download Connection Setup Help Document](#)

Tentative Account Name ⓘ

Server Details

SFTP Server URL *

Port *

Username *

Login Method *

Password

Password *

PGP Encryption for Partner * ☒

Partner PGP Public Key *

Upload
pgp-encryption-public-key.asc
Delete

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TIQ_ORCH_v0.4.1

4. After completing the contact form and giving the tentative account name, the Business User must provide the **partner's server details** in the following fields:
 - a. **Server URL** – Must begin with **sftp://**
 - b. **Port** – A valid port number used by the partner's SFTP server
 - c. **Username** – The username of the account on the partner's server
 - d. **Login Method** – Choose between **Password** or **SSH Key**
 - e. If **Password** is selected as the login method, an additional field will appear to enter the password associated with the provided username.

Partner Management
Workflows

Partners
Account Onboarding
Accounts

← New Account Onboarding Request
Cancel
Save

Server Details

SFTP Server URL *

Port *

Username *

Login Method *

Password

Password *

PGP Encryption for Partner * ☐

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TIQ_ORCH_v0.4.1

- f. If **SSH Key** is selected, the SSH key uploaded in the **MFT Settings** tab will be used. This key will later be shared with the partner, who must attach it to the user account on their SFTP server to allow connection.

Transfer IQ Orchestrator Partner Management Workflows

Ask Galileo... M

Partners Account Onboarding Accounts

← New Account Onboarding Request

Cancel Save

Server Details

SFTP Server URL *

Port *

Username *

Login Method *

SSH Key

[Please download this key and share it with partner.](#)

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5. **Note:** It is important to ensure that the server details provided are accurate and that the partner's server supports the selected login method. Incorrect service configuration may result in connection failures
6. Below the server details section, there is a checkbox labeled **"PGP Encryption for Partner."** When selected, it allows the Business User to upload the **PGP encryption public key** provided by the partner
- When the company needs to send encrypted files to the partner, the Business User must upload the **PGP public key** provided by the partner. Only files with the **.asc** extension containing valid PGP public keys are accepted during the upload process.
 - When a partner wants to send files to a company, the partner will use the company's PGP public key and encrypt the files and send them to the company. To decrypt the files sent by the partner, the company will use the company's PGP private key and decrypt the files received from the partner. This key is auto populated when the form is filled by the Business User.
7. There are two optional fields: **Additional Details** and **File Attachment**. These are not mandatory, but if the Business User wants to share extra information or upload supporting documents for the admin, Business User can use these fields to provide that additional input.

Once all the details are given, the Business User saves the onboarding request by clicking the save button. Once the request is saved the request will be visible in the Account Onboarding Tab table view with a submit button to submit the request to the admin for approval. Once the request is submitted all the admins are notified about the request submission

Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...M

PartnersAccount OnboardingAccounts

Account Onboarding

Select

Search Account Onboarding

Search

New Onboarding Request

Count: 2

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Submit Date	Claimed By	Actions
Rackspace	Partner	OBRQ00002	Created	Model	MFT Business User	N/A	N/A	
Rackspace	AWS	OBRQ00001	Closed	Model	MFT Business User	10 Sep 2025 at 07:04 PM	MFT Super Admin	

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TIQ_ORCH_v0.4.1

Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...M

PartnersAccount OnboardingAccounts

Account Onboarding

Select

Search Account Onboarding

Search

New Onboarding Request

Count: 2

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Submit Date	Claimed By	Actions
Rackspace	Partner	OBRQ00002	Created	Model	MFT Business User	N/A	N/A	
Rackspace	AWS	OBRQ00001	Closed	Model	MFT Business User	10 Sep 2025 at 07:04 PM	MFT Super Admin	

Do you want to submit the request for
Rackspace to Model?

NoYes

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TIQ_ORCH_v0.4.1

Admin Approves Partner Onboarding Request and Onboards Partner with Partner Account:

Once the onboarding request is submitted, it becomes visible to all admins under the **Account Onboarding** tab.

- An admin can claim the request to take ownership in one of two ways: by clicking the **View Request** button in the email notification sent after submission, or by locating and claiming the request directly from the **Account Onboarding** tab.

The screenshot displays the 'Account Onboarding' section of the Transfer IQ Orchestrator interface. The top navigation bar includes 'Partners', 'Account Onboarding', and 'Accounts'. Below the navigation, there is a search bar and a 'Search' button. The table below shows two onboarding requests. The first request, 'OBRQ00002', is in 'Pending Review' status and is owned by 'MFT Business User'. The second request, 'OBRQ00001', is in 'Closed' status and is owned by 'MFT Business User'. A 'Claim' button is visible next to the first request. A confirmation dialog box is overlaid on the table, asking 'Do you want to claim the request?' for request 'OBRQ00002'. The dialog has 'No' and 'Yes' buttons. A mouse cursor is pointing at the 'Yes' button.

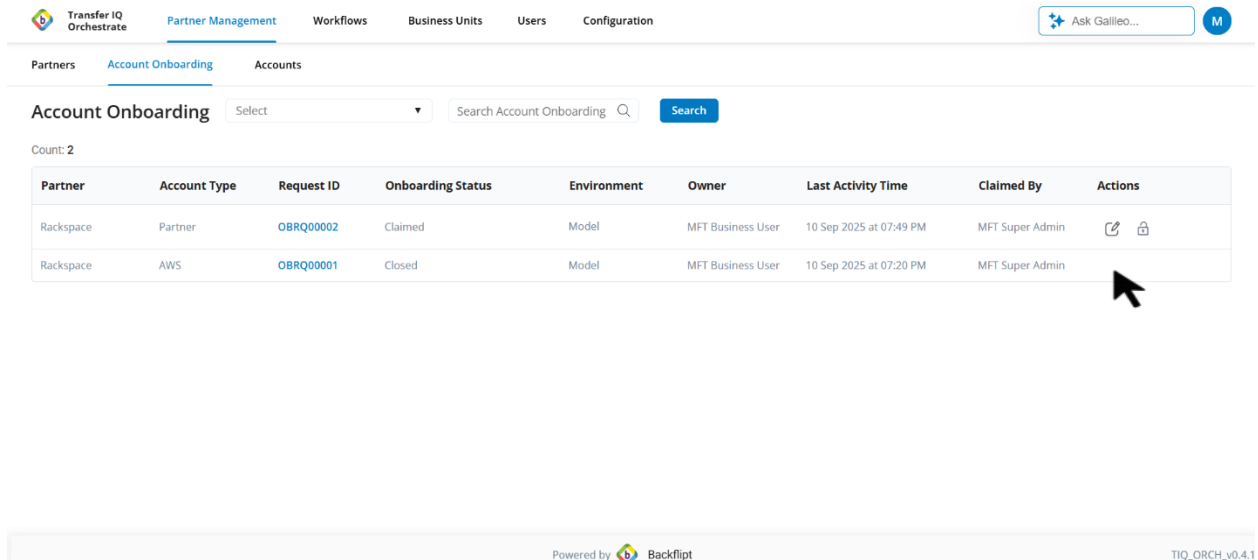
Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	Partner	OBRQ00002	Pending Review	Model	MFT Business User	10 Sep 2025 at 07:46 PM	N/A	 Claim
Rackspace	AWS	OBRQ00001	Closed	Model	MFT Business User	10 Sep 2025 at 07:20 PM	MFT Super Admin	

Do you want to claim the request?

OBRQ00002

No Yes

- After claiming the request, the admin can view all the details provided by the Business User in **edit mode**.
- Click the edit mode to open the request in edit mode





Transfer IQ Orchestrator

Partner Management Workflows Business Units Users Configuration

Partners Account Onboarding Accounts

Account Onboarding Select Search Account Onboarding Search

Count: 2

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	Partner	OBRQ00002	Claimed	Model	MFT Business User	10 Sep 2025 at 07:49 PM	MFT Super Admin	 
Rackspace	AWS	OBRQ00001	Closed	Model	MFT Business User	10 Sep 2025 at 07:20 PM	MFT Super Admin	

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TIQ_ORCH_v0.4.1

- The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are.

Once all the details are correct, there is a section called **IT Admin to fill out following details which contains the following fields**

1. **Bucket Name** – Automatically populated based on the bucket name configured in the metadata settings.
2. **Account Name** – A unique name manually entered by the admin during account creation.
3. **Key Prefix** – Automatically generated in the format: PFTS Folder/ {Account Name}/, where {Account Name} is filled in based on the value entered in the **Account Name** field.
4. **Access Role** – Automatically populated with a predefined access role; this field is not editable.
5. **Logging Role** – Automatically populated with a predefined logging role; this field is also not editable.

Once the admin enters a value in the **Account Name** field, a **Check Availability** option appears to verify if the account name is unique and available. After confirming availability, the admin can click the **Create Account** button to proceed with account creation. Upon

successful creation, a toast message is displayed confirming that the account has been created.

Transfer IQ Orchestrator | Partner Management | Workflows | Business Units | Users | Configuration | Ask Galileo... | M

Partners | Account Onboarding | Accounts

← Rackspace

Cancel | Update

IT Admin to fill out following details

Please review the details filled by business user and provide the following details to create partner account and servers in Environment

Bucket Name: bft-mft-tiq-tcs-prod

Account Name: RackspacePartnerPWDAccount

Check Availability: ✓Account name RackspacePartnerPWDAccount is available.

Key Prefix: pfts-folders/rackspacepartnerpwdaccount/

This path is created under the bucket "bft-mft-tiq-tcs-prod" and folder name based on the Business Unit.

Access Role: tiq-tcs-sftp-connector-access-role-1757514028694

Logging Role: tiq-tcs-sftp-connector-logging-role-1757514028694

Create Account

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TIQ_ORCH_v0.4.1

Status: Claimed

- MA MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 07:49 PM
- MU MFT Business Us... | Business User Pending Review 10 Sep 2025 at 07:46 PM
- MU MFT Business Us... | Business User Created 10 Sep 2025 at 07:45 PM

After the account is created, the admin can proceed to close the request, as no further action is required. Clicking on the **Close Request** button triggers a confirmation prompt.

Transfer IQ Orchestrator | Partner Management | Workflows | Business Units | Users | Configuration | Ask Galileo... | M

Partners | Account Onboarding | Accounts

← Rackspace

Cancel | Update

Close Request

File Attachment

Activity: MA Select

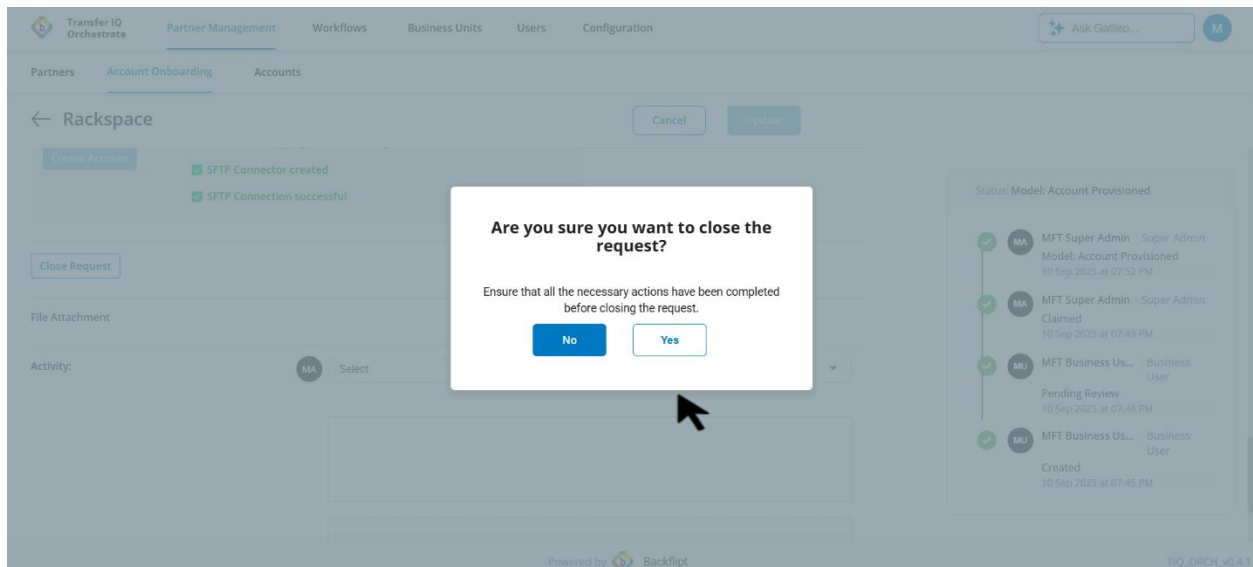
Attach Files

Powered by Backflpt

TIQ_ORCH_v0.4.1

Status: Model: Account Provisioned

- MA MFT Super Admin | Super Admin Model: Account Provisioned 10 Sep 2025 at 07:52 PM
- MA MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 07:49 PM
- MU MFT Business Us... | Business User Pending Review 10 Sep 2025 at 07:46 PM
- MU MFT Business Us... | Business User Created 10 Sep 2025 at 07:45 PM



Once confirmed, the request is marked as **Closed**, and the page redirects back to the **Account Onboarding** table, where the request is now listed with a status of **Closed**.

Partner	Account Type	Request ID	Onboarding Status	Environment	Owner	Last Activity Time	Claimed By	Actions
Rackspace	Partner	OBRQ00002	Closed	Model	MFT Business User	10 Sep 2025 at 07:56 PM	MFT Super Admin	
Rackspace	AWS	OBRQ00001	Closed	Model	MFT Business User	10 Sep 2025 at 07:20 PM	MFT Super Admin	

Email Notification Sent to Business User

When a Partner Account is created the Business User will receive an email notification containing the following details:

Email Subject:

- Account Creation Successful – {Partner Name} – Model

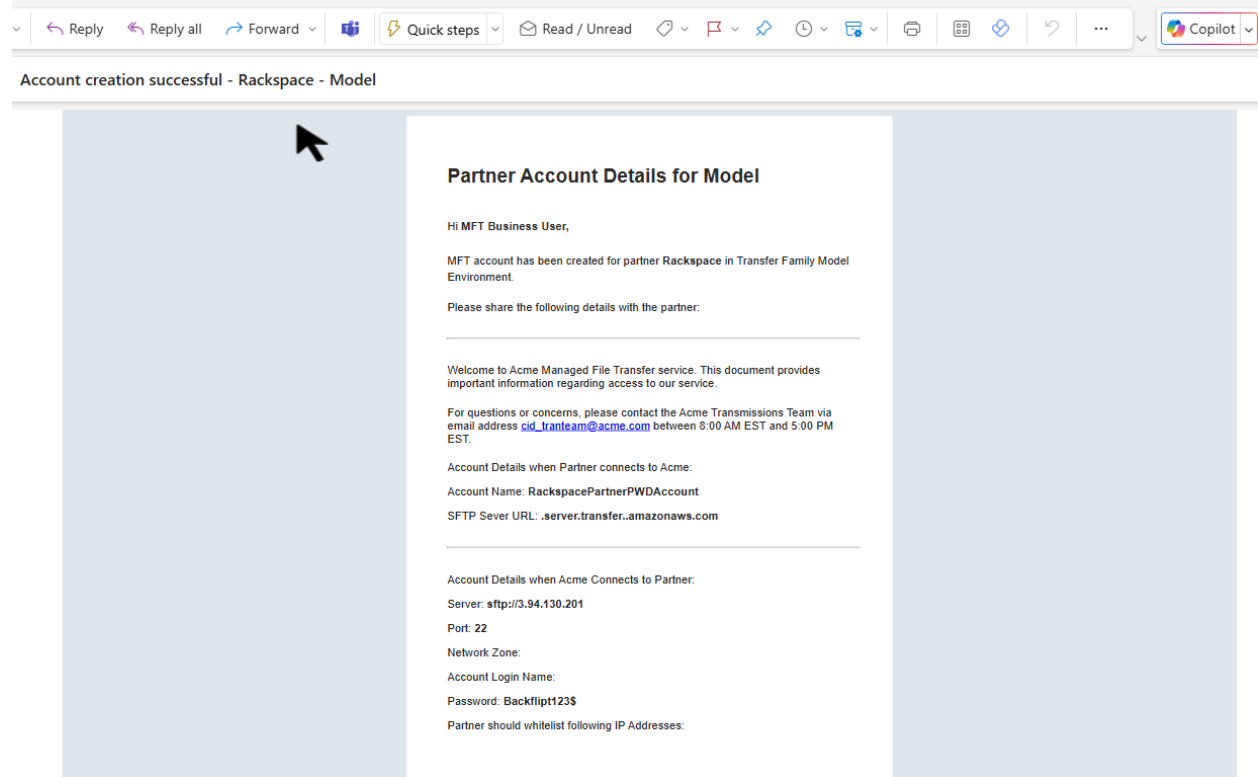
Fields in Email Notification:

- Account Name
- SFTP Server URL
- Port
- Network Zone
- Password/SSH Key (Depending upon the login method selected during account creation)
- Partner should whitelist following IP Addresses

Additional

- Thank you note
- Company Name and Website
- Company Location
- Support Contact Email and Working Hours
- Welcome note and instructions on service access

In addition, the **PGP Encryption Public Key file** will be attached to the email.



Add Partner Hosted Account Workflows

Add Partner Hosted Account Inbound Workflow

In the Partner-Hosted Account Inbound Workflow, the partner uploads a file to their server. The application pulls the file from the source specified by the partner at a scheduled time, which is defined during the creation of the inbound workflow. At the scheduled time, the workflow is triggered, pulls the file from the partner's server, and places it in the destination company's server.

To Create a Partner Hosted Inbound Workflow Business User Creates a Workflow Request with all the required details and submits the workflow request to the admin for approval.

1. Click the Workflows > Workflow Requests tab to view a table displaying the workflow request with the following columns: **Request Id**,
2. To create a new workflow request, click the "Create Workflow Request" button. A window will appear with a screen to **Set up a New Workflow** with various sections
 - a. Info
 - b. Source
 - c. Steps
 - d. Destination
 - e. Outcomes
 - f. Review

Information (Info)

Provide the basic information about account and workflow in this section

This section contains the following fields

1. Environment – Auto populated with Model
2. Business Unit – Auto populated with the Business Unit assigned to the logged in Business User
3. Partner – A dropdown that consists of list of partners and it allows Business User to select a partner for whom the workflow needs to be created
4. Account Type – Partner Hosted account
5. Partner Account – All the partner accounts created for the partner will be displayed in the dropdown, and allows to select a partner account out of all available options

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

1 2 3 4 5 6
Info Source Steps Destination Outcomes Review

Information
Provide the basic information about account and workflow.

Partner and Account Information

Environment * Model

Business Unit Sales

Partner * Rackspace

Account Type * Partner Hosted Account

Account * RackspacePartnerPwdAccount

Workflow Preview

Workflow Visualizer
Configure your workflow to see a visual preview here

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Once the Partner Account is selected, the Workflow Information section is displayed to provide information about the Workflow with below fields

1. Direction – Select Inbound to create an Inbound Workflow
2. Workflow Name – An input field to Enter a Name for the workflow
3. Description – A field to provide a description about the workflow

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

1 2 3 4 5 6
Info Source Steps Destination Outcomes Review

Workflow Information

Direction * Inbound

Workflow Name * Company Pull from Partner Hosted SFTP
This name will help you identify the workflow later.

Description This workflow processes rackspace pipeline status files by passing them through 8 transformation steps: Scan, Copy, Move, PGP Decryption, Decode, Decompress, Tag, and Rename, ensuring secure and standardized delivery.

Next >

Workflow Preview

Workflow Visualizer
Configure your workflow to see a visual preview here

Powered by Backflit TIQ_ORCH_v0.4.1

Once all the information is done click the **“Next”** button to navigate to the Source Section

Source

The partner uploads the file to the source folder. All information regarding the source and trigger scheduling will be provided in the source section.

The Source Section Consists of two sub sections:

1. Trigger Configuration
2. Trigger Schedule

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

1 Info 2 Source 3 Steps 4 Destination 5 Outcomes 6 Review

Trigger Configuration

Trigger Type: Schedule

Folder Path *

File Name Pattern

Use "*" for any characters, "?" for a single character. Leave blank to trigger for all files.

Examples: "*.csv" (all CSV files), "report_*.xlsx" (Excel files starting with "report_"), "data_????*.json" (JSON files with a specific pattern)

Trigger Schedule

Select Timezone *

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwAccount
Account Type	Partner
Direction	inbound

Source Pending

Steps Pending

Destination Pending

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Trigger Configuration:

This section provides details about the source folder and the file name pattern that should trigger the workflow.

The section consists of the following fields:

1. Trigger Type – Pre-filled with “Schedule” because the workflow is triggered in a schedule time
2. Folder Path – folder path where the partner uploads the file(shared by partner)
3. File Name Pattern - Specify the file name or pattern that should trigger the workflow.
 - a. You can either enter the **exact file name** (e.g., Sales . pdf) or use **wildcard characters** to define a pattern:
 - b. * — Matches **any number of characters**
 - c. ? — Matches **exactly one character**
 - d. **Examples:**
 - e. *.* – Triggers the workflow for **any file**, regardless of name or extension

- f. *.csv – Triggers for any file with a .csv extension, such as data.csv or report.csv
- g. "report_*.xlsx" (Excel files starting with "report_")
- h. data_????_*.json – Triggers for JSON files that follow a specific pattern: the file name must start with data_, followed by **exactly four characters**
- i. Simply leave blank to trigger for all files

Setup New Workflow

Info Source Steps Destination Outcomes Review

Source

Configure the source that will trigger this workflow.

Trigger Configuration

Trigger Type: Schedule

Folder Path: /sftpfiles/TCSPull

File Name Pattern: pipeline-forecast-rackspace:

Use "*" for any characters, "?" for a single character. Leave blank to trigger for all files.

Examples: "*.csv" (all CSV files), "report_*.xlsx" (Excel files starting with "report_"), "data_????_*.json" (JSON files with a specific pattern)

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	inbound

Source Pending

Steps Pending

Destination Pending

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TIQ_ORCH_v0.4.1

Trigger Schedule

This section provides all the necessary information to configure when the schedule should be triggered.

It includes the following fields:

1. **Select Timezone** – A dropdown to choose the desired time zone (e.g., America/NewYork).
2. **Select Frequency** – A dropdown to select how often the schedule should run: Daily, Weekly, or Monthly.
3. **Select Time** – A dropdown to choose the specific time for the trigger, displayed in 12-hour format with both A.M. and P.M. options.

After providing all mandatory details, click Next to continue to the Steps Section

Steps

There are different Steps in the PFTS Inbound Workflow. Once the workflow is triggered the all the steps configured in the steps section will be executed and the file will be placed in the destination section:

The Steps Available in The PFTS Inbound Workflows are as follows

Scan - The scan steps check files or directories for potential malware, viruses, or security threats

Below Fields are available after adding the Scan Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name:** The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file

location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.

- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

The screenshot displays the 'Setup New Workflow' interface. At the top, there are navigation tabs: 'Workflow Requests', 'File Workflows', and 'Workflows'. The 'Workflows' tab is active. Below the tabs, there's a 'Setup New Workflow' section with a progress bar showing steps: Info, Source, Steps (active), Destination, Outcomes, and Review. The 'Steps' section is expanded, showing a '1. Scan' step. The 'Scan' step configuration includes a description, destination bucket (bft-mft-tiq-tcs-prod), destination key prefix (business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount), and an 'Overwrite Existing' checkbox which is checked. A 'Workflow Preview' panel on the right shows the workflow steps: Source (Folder Path: /sftpfiles/TCSPull), Scan (Folder path: business-unit-folders/sales/racksp...), and Destination (Pending).

Copy - The copy step duplicates a file from the source location to the destination without deleting the original. This ensures the file remains accessible in both locations.

Below Fields are available after adding the Copy Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Progress: 1. Info, 2. Source, 3. Steps, 4. Destination, 5. Outcomes, 6. Review

2. Copy

Description: Copies the file from the scanned folder to the copied folder, keeping the original intact

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / copied

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	inbound

Workflow Steps:

- Source**: Folder Path : stpfiles/TCSPull
- scan**: Folder path: business-unit-folders/sales/racksp...
- copy**: Folder path: business-unit-folders/sales/racksp...
- Destination**: Pending

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TIQ_ORCH_v0.4.1

Move - The move operation shifts a file from the source location to the destination. Once moved, the file no longer exists in the source location.

Below Fields are available after adding the Move Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

3. Move

Description Moves the file from the copied folder to the moved folder, deleting it from the source

Source Options

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket bft-mft-tiq-tcs-prod

Destination Key Prefix business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / moved

Overwrite Existing ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	inbound

- Source Folder Path : /sftpfiles/TCSPull
- scan Folder path: business-unit-folders/sales/racksp...
- copy Folder path: business-unit-folders/sales/racksp...
- move Folder path: business-unit-folders/sales/racksp...
- Destination

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PGP Decrypt - The PGP decrypt step retrieves an encrypted file from the source location, decrypts it using the PGP private key provided in the MFT Settings tab, and places the decrypted file in the specified destination folder.

Below Fields are available after adding the Decrypt Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Progress: 1. Info, 2. Source, 3. Steps (Active), 4. Destination, 5. Outcomes, 6. Review

4. PGP Decryption

Description: Decrypts the file from the moved folder using the private key and places it in the decrypted folder.

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket: bft-enft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / decrypted

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	inbound

- Source: Folder Path : stpfiles/TCSPull
- scan: Folder path: business-unit-folders/sales/racksp...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- pgpDecrypt: Folder path: business-unit-folders/sales/racksp...

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Decode - Decode step converts encoded file back to its original, readable format. It is used when a file has been encoded (for example, in Base64) and needs to be returned to its normal form so that it can be used

Below Fields are available after adding the Decode Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- Encode Type – A dropdown to select the encode type (Supported type: Base64)
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Info Source **Steps** Destination Outcomes Review

5. Decode

Description: Restores the file from encoded form to its original readable format.

Source Options: ☒ Apply on the file created from previous step ☐ Apply on the original file

Encode Type: BASE64

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / decoded

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	Inbound

- Folder path: business-unit-folders/sales/racksp...
- copy Folder path: business-unit-folders/sales/racksp...
- move Folder path: business-unit-folders/sales/racksp...
- pgpDecrypt Folder path: business-unit-folders/sales/racksp...
- decode Folder path: business-unit-folders/sales/racksp...

Decompress - Decompress step extracts and restores the original content from a compressed file, allowing the data to be accessed and used in its original form.

Below Fields are available after adding the Decompress Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**- The name of the storage bucket configured in metadata settings.
- **Detect Type From Extension**- A checkbox that Automatically detect the compression type based on the file extension (e.g., .zip, .tar.gz). Uncheck this to manually select a compression type.
- **Compression Type** – A dropdown to select the Compression type (zip, tar,gzip,zstd)
- Select either detect type from extension or Compression type
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

6. Decompress

Description Extracts the file from the decoded folder and restores it to its original form in the decompressed folder.

Source Options

Apply on the file created from previous step

Apply on the original file

Detect Type From Extension ☒ Automatically detect the compression type based on the file extension (e.g., .zip, .tar.gz). Uncheck this to manually select a compression type.

Destination Bucket bft-wft-tiq-tcs-prod

Destination Key Prefix business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / decompressed

If you are copying files into a folder, specify/at the end of the prefix name

Overwrite Existing ☒

Workflow Preview

Partner Rackspace

Account RackspacePartnerPwDAccount

Account Type Partner

Direction Inbound

Folder path: business-unit-folders/sales/racksp...

copy Folder path: business-unit-folders/sales/racksp...

move Folder path: business-unit-folders/sales/racksp...

pgpDecrypt Folder path: business-unit-folders/sales/racksp...

decode Folder path: business-unit-folders/sales/racksp...

decompress Folder path: business-unit-folders/sales/racksp...

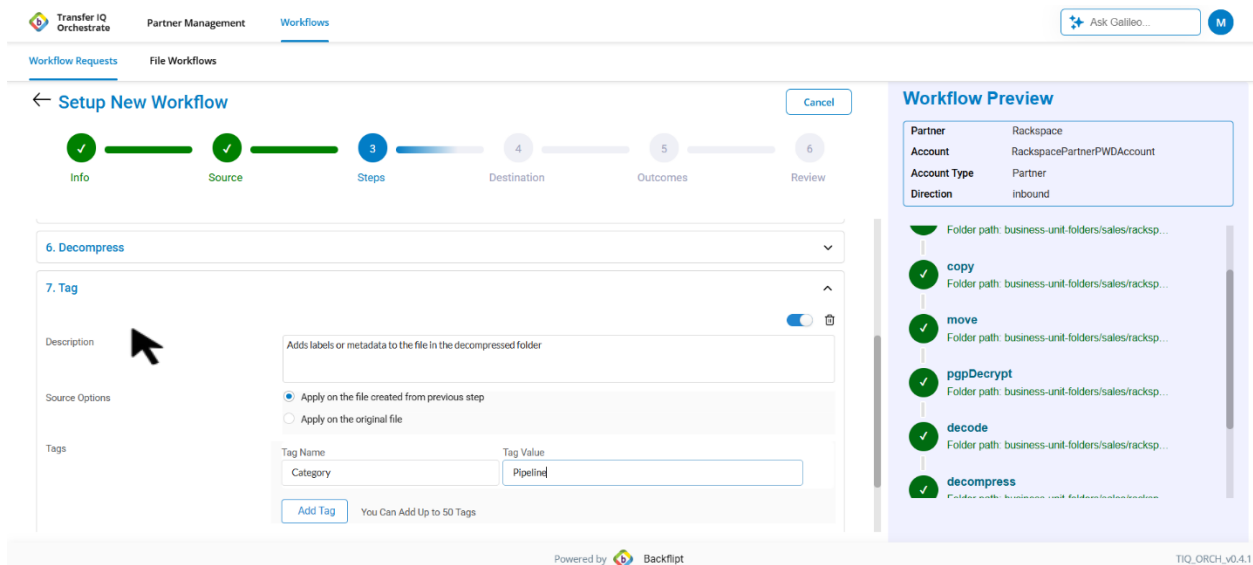
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Tag - The tag step allows adding additional information to files in the form of key-value pairs. This extra info helps describe, organize, and manage them more effectively. Up to 50 tags can be added per file.

Below Fields are available after adding the Tag Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.

This section includes fields for **Tag Name** and **Tag Value** to add tags to a file. To add more tags, click the **Add Tag** button. Each tag also has a **Remove** button, allowing it to be deleted if needed.



Rename - The **rename step** changes the name of a file. This helps organize files by giving them clear, consistent, or updated names without altering their content or location.

Below Fields are available after adding the Rename Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **New File Name** – Enter the Renamed New file name
- **Timestamp in Filename** –
- A checkbox that, when enabled, adds a timestamp to the file name during the rename step execution

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

6. Decompress

7. Tag

8. Rename

Description

Source Options

☒ Apply on the file created from previous step
☐ Apply on the original file

New File Name

Time stamp in Filename ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	Inbound

Folder path: business-unit.folders/sales/racksp...

copy Folder path: business-unit.folders/sales/racksp...

move Folder path: business-unit.folders/sales/racksp...

pgpDecrypt Folder path: business-unit.folders/sales/racksp...

decode Folder path: business-unit.folders/sales/racksp...

decompress Folder path: business-unit.folders/sales/racksp...

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TIQ_ORCH_v0.4.1

In addition to adding the steps there are some other actions like deleting and disabling a step

Delete - The **delete step** removes a file from its source permanently. This step is typically used to clean up files after they are no longer needed

Below Fields are available after adding the Copy Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.

Disable a Step

A toggle switch is located at the top-right corner of each step. When enabled, the step will be executed as part of the workflow. If disabled, the step will be skipped during workflow execution.

Once all the steps are added, click the next button to navigate to the destination section

Destination

The Destination section contains all the necessary details about where the file should be delivered.

1. **Bucket Name** – Pre-filled bucket name configured in metadata settings
2. **Key Prefix** – An auto-populated, non-editable folder path indicating where the file will be placed after the transfer.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps **Destination** Outcomes Review

Destination

Configure where processed files will be delivered.

Bucket Name bft-mft-tiq-tcs-prod

Key prefix business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount/inbound

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	inbound

- Source Folder Path : /sttfiles/TCSPull
- scan Folder path: business-unit-folders/sales/racksp...
- copy Folder path: business-unit-folders/sales/racksp...
- move Folder path: business-unit-folders/sales/racksp...
- pgpDecrypt Folder path: business-unit-folders/sales/racksp...

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Outcome Actions

The Outcomes section consists of two tabs:

1. On Success
2. On Failure.

On Success – Notify the email entered upon successful file transfer.

On Failure – Notify the email entered if the file transfer fails.

Note: Enter Comma Separated Emails to notify multiple emails

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Outcome Actions
Define actions to take when the workflow succeeds or fails.

On Failure On Success

Send Email
Email ID's (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

Email ID's should be separated by comma (,)

< Previous Next >

Workflow Preview

Partner Rackspace
Account RackspacePartnerPwDAccount
Account Type Partner
Direction inbound

decode
Folder path: business-unit-folders/sales/racksp...

decompress
Folder path: business-unit-folders/sales/racksp...

tag
key Category value Pipeline

rename
\${currentFileName}_\${timeStamp} \${extension}

Destination
Folder Path : business-unit-folders/sales/racksp...

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Review

Review all the details provided during the workflow request creation. If everything is correct, the Business User can proceed to create the workflow request. If any changes are needed, use the Previous button to go back and make edits

Once the workflow request creation is done, Business User submits the request to the admin for approval

, it becomes visible to all admins under the Workflow Requests tab.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Key prefix business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount/inbound

Outcomes Actions

On Failure

Send Email
Email Address (s) mft_admin@backflpt.com, mft_businessuser@backflpt.com

On Success

Send Email
Email Address (s) mft_admin@backflpt.com, mft_businessuser@backflpt.com

< Previous Create

Workflow Preview

Partner Rackspace
Account RackspacePartnerPwDAccount
Account Type Partner
Direction inbound

Source
Folder Path : /sftpfiles/TCSPull

scan
Folder path: business-unit-folders/sales/racksp...

copy
Folder path: business-unit-folders/sales/racksp...

move
Folder path: business-unit-folders/sales/racksp...

pgpDecrypt
Folder path: business-unit-folders/sales/racksp...

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Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...

M

Workflow Requests

File Workflows

Workflow Requests

Select

Search Workflows

Search

Create Workflow Request

Count: 3

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00003	Company Pull from P...	Rackspace	Inbound	Model	Request C...	MFT Business Us...			Partner	
WR00001	Partner Upload to Co...	Rackspace	Inbound	Model	Closed	MFT Business Us...	10 Sep 2025 at 09:29 PM	MFT Super Admin	AWS	
WR00002	Partner Download fro...	Rackspace	outbound	Model	Closed	MFT Business Us...	10 Sep 2025 at 09:30 PM	MFT Super Admin	AWS	

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Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...

M

Workflow Requests

File Workflows

Workflow Requests

Select

Search Workflows

Search

Create Workflow Request

Count: 3

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00003	Company Pull from P...	Rackspace	Inbound	Model					Partner	
WR00001	Partner Upload to Co...	Rackspace	Inbound	Model				MFT Super Admin	AWS	
WR00002	Partner Download fro...	Rackspace	outbound	Model				MFT Super Admin	AWS	

Do you want to submit the request
WR00003 to Model?

No

Yes

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Admin Approval – PFTS Inbound Workflow request

An admin can claim the request to take ownership in one of two ways: by clicking the View Request button in the email notification sent after submission, or by locating and claiming the request directly from the Account Onboarding tab.

<div> Transfer IQ Orchestrator </div> <div> Partner Management Workflows Business Units Users Configuration </div> <div> <input type="text" value="Ask Galileo..."/> M </div>																																																						
<div> Workflow Requests File Workflows </div> <div> <div>Workflow Requests</div> <div>Select</div> <div>Search Workflows</div> <div>Search</div> </div> <div>Count: 3</div> <table> <tr> <th>Request ID</th><th>Workflow Name</th><th>Partner</th><th>Direction</th><th>Environment</th><th>Status</th><th>Owner</th><th>Submit Date</th><th>Claimed By</th><th>Account Type</th><th>Actions</th></tr> <tr> <td>WR00003</td><td>Company Pull from ...</td><td>Rackspace</td><td>inbound</td><td>Model</td><td>Pending ...</td><td>MFT Business ...</td><td>10 Sep 2025 at 09:48 PM</td><td></td><td>Partner</td><td></td></tr> <tr> <td>WR00001</td><td>Partner Upload to C...</td><td>Rackspace</td><td>inbound</td><td>Model</td><td>Closed</td><td>MFT Business ...</td><td>10 Sep 2025 at 09:29 PM</td><td>MFT Super Ad...</td><td>AWS</td><td></td></tr> <tr> <td>WR00002</td><td>Partner Download fr...</td><td>Rackspace</td><td>outbound</td><td>Model</td><td>Closed</td><td>MFT Business ...</td><td>10 Sep 2025 at 09:30 PM</td><td>MFT Super Ad...</td><td>AWS</td><td></td></tr> </table> <div> <div>Powered by Backflip</div> <div>TIQ_ORCH_v0.4.1</div> </div>											Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions	WR00003	Company Pull from ...	Rackspace	inbound	Model	Pending ...	MFT Business ...	10 Sep 2025 at 09:48 PM		Partner		WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS		WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	
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<div> Transfer IQ Orchestrator </div> <div> Partner Management Workflows Business Units Users Configuration </div> <div> <input type="text" value="Ask Galileo..."/> M </div>																																																						
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After claiming the request, the admin can view all the details provided by the Business User in edit mode.

<div> <div>Transfer IQ Orchestrator</div> <div>Partner Management</div> <div>Workflows</div> <div>Business Units</div> <div>Users</div> <div>Configuration</div> </div> <div> <div>Ask Galileo...</div> <div>M</div> </div>										
<div>Workflow Requests</div> <div>File Workflows</div>										
<div>Workflow Requests</div> <div>Select</div> <div>Search Workflows</div> <div>Search</div>										
Count: 3										
Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00003	Company Pull from ...	Rackspace	inbound	Model	Request ...	MFT Business ...	10 Sep 2025 at 09:48 PM	MFT Super Ad...	Partner	
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	
WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are.

Click the Create button to create the workflow

Transfer IQ Orchestrator

Partner Management

Workflows

Business Units

Users

Configuration

Ask Galileo...

M

Workflow Requests

File Workflows

← WR00003

Cancel

✓

Info

✓

Source

✓

Steps

✓

Destination

✓

Outcomes

6

Review

Outcomes Actions

On Failure

Send Email

Email Address (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

On Success

Send Email

Email Address (s)

mft_admin@backflpt.com, mft_businessuser@backflpt.com

Activity:

MA

Select

Previous

Create

Status: Claimed

✓

MA

MFT Super Admin | Super Admin

Claimed

10 Sep 2025 at 09:49 PM

✓

BU

MFT Business Us... | Business User

Pending Review

10 Sep 2025 at 09:48 PM

✓

BU

MFT Business Us... | Business User

Request Created

10 Sep 2025 at 09:48 PM

Transfer IQ Orchestrator | Partner Management | **Workflows** | Business Units | Users | Configuration

Workflow Requests | File Workflows

← WR00003 Cancel

Info Source Steps Destination Outcomes **Review**

On Success

Send Email

Email Address (s) mft_admin@backflip.com mft_businessuser@backflip.com

Close Request

Activity: MA Select

Status: Workflow Created in Model

- ✓ MA MFT Super Admin | Super Admin
Workflow Created in Model
10 Sep 2025 at 09:51 PM
- ✓ MA MFT Super Admin | Super Admin
Claimed
10 Sep 2025 at 09:49 PM
- ✓ BU MFT Business Us... | Business User
Pending Review
10 Sep 2025 at 09:48 PM
- ✓ BU MFT Business Us... | Business User
Request Created
10 Sep 2025 at 09:48 PM

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After the workflow is created, the admin can proceed to close the request, as no further action is required. Clicking the **Close Request** button triggers a confirmation prompt. Once confirmed, the request is marked as **Closed**, and the page redirects back to the Workflow Requests table, where the request is now listed with a status of **Closed**.

Transfer IQ Orchestrator | Partner Management | **Workflows** | Business Units | Users | Configuration

Workflow Requests | File Workflows

← WR00003 Cancel

Info Source Steps Destination Outcomes **Review**

On Success

Send Email

Email Address (s)

Close Request

Activity:

Are you sure you want to close the request?

Ensure that all the necessary actions have been completed before closing the request.

No Yes

Status: Workflow Created in Model

- ✓ MA MFT Super Admin | Super Admin
Workflow Created in Model
10 Sep 2025 at 09:51 PM
- ✓ MA MFT Super Admin | Super Admin
Claimed
10 Sep 2025 at 09:49 PM
- ✓ BU MFT Business Us... | Business User
Pending Review
10 Sep 2025 at 09:48 PM
- ✓ BU MFT Business Us... | Business User
Request Created
10 Sep 2025 at 09:48 PM

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Transfer IQ Orchestrate

Partner Management

Workflows

Business Units

Users

Configuration

Ask Galileo...

M

Workflow Requests

File Workflows

Workflow Requests

Select

Search Workflows

Search

Count: 3

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00003	Company Pull from ...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:48 PM	MFT Super Ad...	Partner	
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WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

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Add Partner Hosted Account Outbound Workflow

In the Partner-Hosted Account Outbound Workflow, the company uploads a file in the aws s3 bucket. The application pushes the file to the destination shared by the partner which the Business User defined during the creation of the outbound workflow.

To Create a Partner Hosted Outbound Workflow Business User Creates a Workflow Request with all the required details and submits the workflow request to the admin for approval.

1. Click the Workflows > Workflow Requests tab to view a table displaying the workflow request with the following columns: **Request Id**,
2. To create a new workflow request, click the "Create Workflow Request" button. A window will appear with a screen to **Set up a New Workflow** with various sections
 - a. Info
 - b. Source
 - c. Steps
 - d. Destination
 - e. Outcome

Information (Info)

Provide the basic information about account and workflow in this section

This section contains the following fields

1. Environment – Auto populated with Model
2. Business Unit – Auto populated with the Business Unit assigned to the logged in Business User
3. Partner – A dropdown that consists of list of partners and it allows Business User to select a partner for whom the workflow needs to be created
4. Account Type – Partner Hosted account
5. Partner Account – All the partner accounts created for the partner will be displayed in the dropdown, and allows to select a partner account out of all available options

Once the Partner Account is selected, the Workflow Information section is displayed to provide information about the Workflow with below fields

1. Direction – Select Inbound to create a Inbound Workflow
2. Workflow Name – An input field to Enter a Name for the workflow
3. Description – A field to provide a description about the workflow

The screenshot shows the 'Setup New Workflow' interface. At the top, there are tabs for 'Workflow Requests' and 'File Workflows'. Below them is a progress bar with steps 1-6: Info, Source, Steps, Destination, Outcomes, and Review. Step 1, 'Info', is currently active. A 'Cancel' button is located at the top right. The 'Workflow Information' section on the left contains the following fields:

- Account ***: A dropdown menu showing 'RackspacePartnerPWAAccount'.
- Direction ***: A dropdown menu showing 'Outbound'.
- Workflow Name ***: A text input field containing 'Company Push to Partner Hosted SFTP'. Below the field is a note: 'This name will help you identify the workflow later.'
- Description**: A text area containing the text: 'This workflow processes Rackspace joint pipeline files by passing them through 7 transformation steps: Copy, Move, Compress, Encode, PGP Encryption, Tag, and Rename, ensuring secure and standardized outbound delivery.'

A 'Next >' button is located at the bottom right of the 'Workflow Information' section. To the right of the main form is a 'Workflow Preview' sidebar showing a summary of the workflow configuration:

Partner	Rackspace
Account	RackspacePartnerPWAAccount
Account Type	Partner
Direction	Inbound

Below the table, there is a vertical timeline showing the steps: 1 Source Pending, 2 Steps Pending, and 3 Destination Pending. At the bottom of the interface, there is a footer that says 'Powered by Backflip' and a version number 'TIQ_ORCH_v0.4.1'.

Once all the information is done click the **“Next”** button to navigate to the Source Section

Source

The Business User uploads the file to the source folder in S3 Bucket. All information regarding the source and trigger scheduling will be provided in the source section.

The Source Section Consists of Trigger Configuration sub section

Trigger Configuration:

This section provides details about the source folder and the file name pattern that should trigger the workflow.

The section consists of the following fields:

1. Trigger Type – Pre-filled with “S3 Upload” because the Business User Uploads the file in S3 Folder Path
2. Bucket Name – Pre-filled Bucket name
3. Key Prefix – Folder Path where the Business User uploads the file
4. File Name Pattern - Specify the file name or pattern that should trigger the workflow.
 - a. You can either enter the **exact file name** (e.g., Sales . pdf) or use **wildcard characters** to define a pattern:
 - b. * — Matches **any number of characters**
 - c. ? — Matches **exactly one character**
 - d. **Examples:**
 - e. *. * – Triggers the workflow for **any file**, regardless of name or extension
 - f. *. csv – Triggers for any file with a . csv extension, such as data . csv or report . csv
 - g. "report_*.xlsx" (Excel files starting with "report_")
 - h. data_????_*.json – Triggers for JSON files that follow a specific pattern: the file name must start with data_, followed by **exactly four characters**.
 - i. Simply leave blank to trigger for all files

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Source

Configure the source that will trigger this workflow.

Trigger Configuration

Trigger Type S3 Upload

Bucket Name bft-mft-tiq-tcs-prod

Key prefix business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount/outbound

File Name Pattern aws-joint-pipeline*

Use "*" for any characters, "?" for a single character. Leave blank to trigger for all files.

Examples: "*.csv" (all CSV files), "report_*.xlsx" (Excel files starting with "report_"), "data_????_*.json" (JSON files with a specific pattern)

< Previous Next >

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	outbound

Source Pending

Steps Pending

Destination Pending

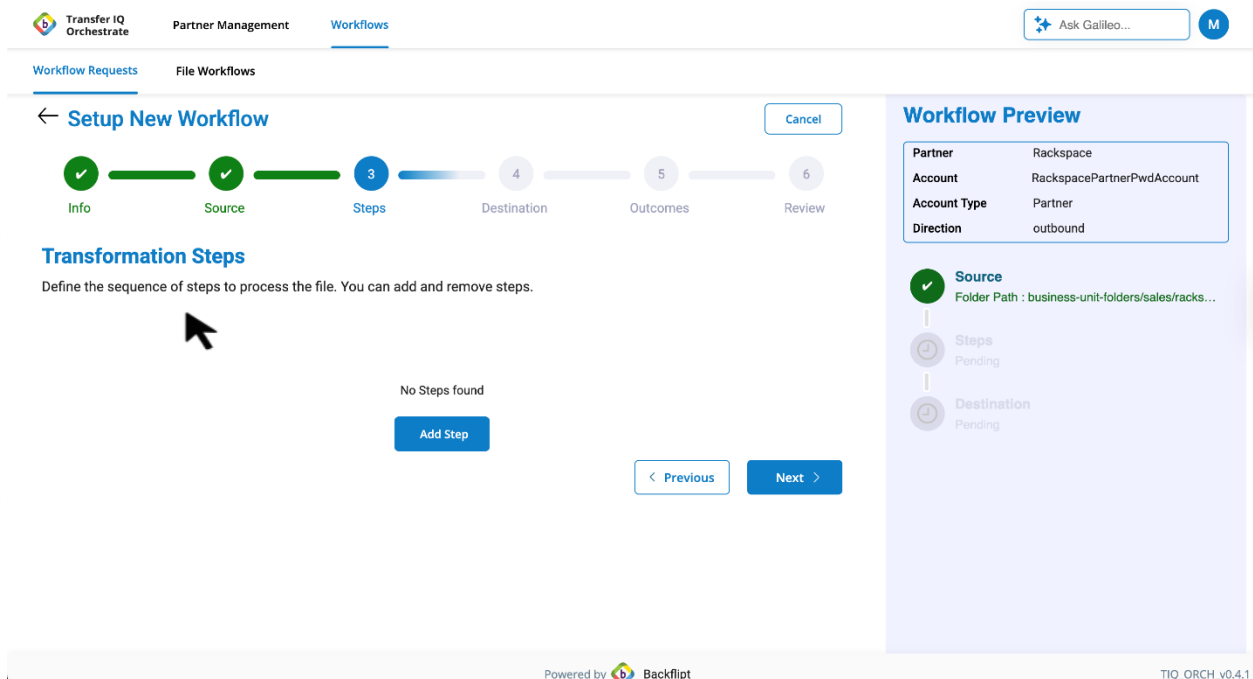
Powered by Backflip

TIQ_ORCH_v0.4.1

Once all the fields are provided, click the next button to navigate to the steps section

Steps

There are different Steps in the PFTS Outbound Workflow. Once the workflow is triggered the all the steps configured in the steps section will be executed and the file will be placed in the destination section:



The Steps Available in The PFTS Outbound Workflows are as follows

Copy - The copy step duplicates a file from the source location to the destination without deleting the original. This ensures the file remains accessible in both locations.

Below Fields are available after adding the Copy Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file

location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.

- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Define the sequence of steps to process the file. You can add and remove steps.

1. Copy

Description: Copies the file from the source folder to the copied folder, keeping the original intact

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / copied

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	outbound

Source: Folder Path : business-unit-folders/sales/racks...

copy: Folder path: business-unit-folders/sales/racksp...

Destination: Pending

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Move - The move operation shifts a file from the source location to the destination. Once moved, the file no longer exists in the source location.

Below Fields are available after adding the Move Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.

- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Progress: Info (✓) → Source (✓) → **Steps (3)** → Destination (4) → Outcomes (5) → Review (6)

2. Move

Description: Moves the file from the copied folder to the moved folder, deleting it from the source

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Destination Bucket: bft-mft-tiq-tcs-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/partner/pwdaccount / moved

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	outbound

Source: Folder Path: business-unit-folders/sales/racksp...
 copy: Folder path: business-unit-folders/sales/racksp...
 move: Folder path: business-unit-folders/sales/racksp...
 Destination: Pending

Powered by Backflpt

TIQ_ORCH_v0.4.1

Compress - The Compress step reduces the file size by packaging the original content into a compressed format, making it more efficient for storage or transfer based on Compression Type and level

Below Fields are available after adding the compress Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- Compression Type – A dropdown to select the compression type which Specifies the format used for compression (e.g., ZIP, GZIP, TAR)
 - Available options – zip, tar, zstd, gzip
- Compression Level - Defines the degree of compression applied
 - **Available levels – Store, Fastest, Fast, Normal, Good, Better, Best**
- **Bucket Name**- The name of the storage bucket configured in metadata settings.
- **Detect Type From Extension**- A checkbox that Automatically detect the compression type based on the file extension (e.g., .zip, .tar.gz). Uncheck this to manually select a compression type.
- Compression Type – A dropdown to select the Compression type (zip, tar,gzip,zstd)

- Select either detect type from extension or Compression type
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Progress: Info (✓) → Source (✓) → **Steps (3)** → Destination (4) → Outcomes (5) → Review (6)

3. Compress

Description: Reduces the file size by encoding it into a compressed format (e.g., .zip, .tar, .gz)

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Compression Type: Zip

Level: Fast

Destination Bucket: bft-mft-tiq-tci-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / compressed

Overwrite Existing: ☒

Workflow Preview

- Source: Folder Path: business-unit-folders/sales/racks...
- copy: Folder path: business-unit-folders/sales/racksp...
- move: Folder path: business-unit-folders/sales/racksp...
- compress**: Type: ---, Folder path: business-unit-folders/sa...
- Destination: Pending

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TIQ_ORCH_v0.4.1

Encode - The Encode step converts a file from its original, readable format into an encoded format (for example, Base64). This is typically done to ensure safe transmission or storage of the file in systems that require encoded data.

Below Fields are available after adding the Decode Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- Encode Type – A dropdown to select the encode type (Supported type: Base64)
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit

Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.

- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

Setup New Workflow

Progress: 1. Info, 2. Source, 3. Steps (Current), 4. Destination, 5. Outcomes, 6. Review

4. Encode

Description: Converts the file into Base64 format for safe transmission or storage.

Source Options:

- ☒ Apply on the file created from previous step
- ☐ Apply on the original file

Encode Type: BASE64

Destination Bucket: bft-mft-tiq-prod

Destination Key Prefix: business-unit-folders/sales/rackspace/rackspacepartnerpwdaccount / encoded

Overwrite Existing: ☒

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPwDAccount
Account Type	Partner
Direction	outbound

- Source**: Folder Path: business-unit-folders/sales/racks...
- copy**: Folder path: business-unit-folders/sales/racksp...
- move**: Folder path: business-unit-folders/sales/racksp...
- compress**: Type: ZIP, Folder path: business-unit-folders/sa...
- encode**: Type: ---, Folder path: business-unit-folders/sa...

PGP Encrypt - The PGP encrypt step retrieves a plain file from the source location, encrypts it using the PGP public key provided during account creation, and places the encrypted file in the specified destination folder.

Below Fields are available after adding the Decrypt Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Bucket Name**: The name of the storage bucket configured in metadata settings.
- **Destination Key Prefix** - The folder path or prefix within the destination bucket where the files will be placed (e.g., Business Unit Folder/sales/{Partner}/{Partner name}). In addition to this, a custom folder can be specified in the input field next to the Destination Key Prefix. The final file location will be the combination of the prefix path plus the custom folder entered, determining exactly where the file will be stored after the step is executed.

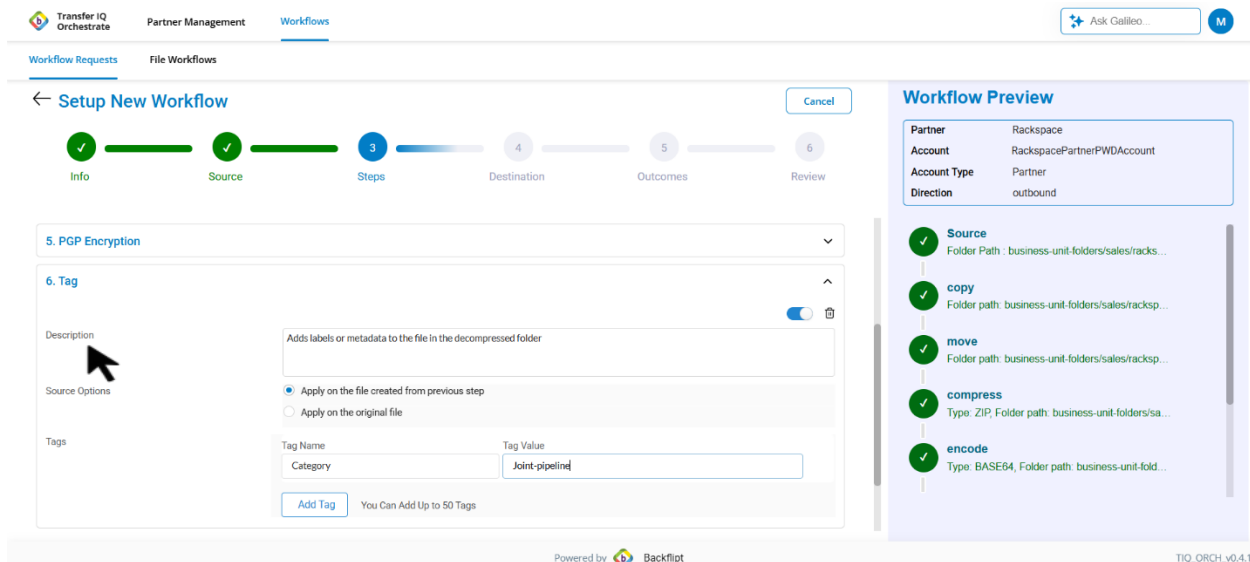
- **Overwrite Existing** – This checkbox is enabled by default. If a file with the same name and extension already exists, it will be overwritten.

The screenshot displays the 'Setup New Workflow' page in the Transfer IQ Orchestrator. The top navigation bar includes 'Transfer IQ Orchestrator', 'Partner Management', and 'Workflows'. A search bar with 'Ask Galileo...' and a user profile icon are on the right. The main content area has tabs for 'Workflow Requests' and 'File Workflows'. The 'Setup New Workflow' section features a progress bar with steps: Info, Source, Steps (active), Destination, Outcomes, and Review. The 'Steps' section is expanded, showing '5. PGP Encryption' with fields for Description, Source Options (radio buttons for 'Apply on the file created from previous step' and 'Apply on the original file'), Destination Bucket, Destination Key Prefix, and an 'Overwrite Existing' checkbox. A 'Workflow Preview' panel on the right shows a list of steps: Source, copy, move, compress, and encode, each with a green checkmark and details. The bottom of the interface shows 'Powered by Backflipit' and the version 'TIQ_ORCH_v0.4.1'.

Tag - The tag step allows adding additional information to files in the form of key-value pairs. This extra info helps describe, organize, and manage them more effectively. Up to 50 tags can be added per file.

Below Fields are available after adding the Tag Step

- **Description** – A detailed description about the step added
- **Source Options** Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **Tags Step** – This section includes fields for **Tag Name** and **Tag Value** to add tags to a file. To add more tags, click the **Add Tag** button. Each tag also has a **Remove** button, allowing it to be deleted if needed.

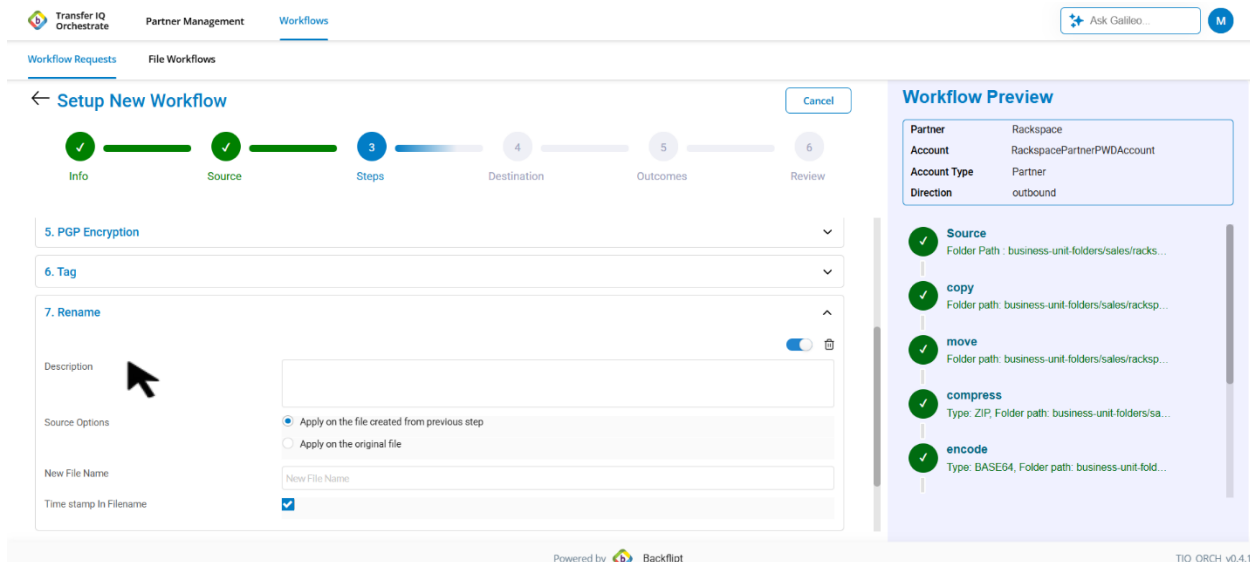


Rename - The **rename step** changes the name of a file. This helps organize files by giving them clear, consistent, or updated names without altering their content or location.

Below Fields are available after adding the Rename Step

- Description – A detailed description about the step added
- Source Options Consists of two options
 - **Apply on Original File** – When selected, the step will be executed on the original file located in the source.
 - **Apply on File Created from Previous Step** – When selected, the step will be executed on the output generated by the previous step.
- **New File Name** – Enter the Renamed New file name
- **Timestamp in Filename** – A checkbox that, when enabled, adds a timestamp to the file name during the rename step execution

In addition to adding the steps there are some other actions like deleting and disabling a step



Delete a Step

A delete icon button is available to remove a step after it has been added. To delete a step, click the delete button. A confirmation popup will appear with "Yes" and "No" options, along with a final **Delete** button:

- If **"Yes"** is selected and the **Delete** button is clicked, the step will be permanently removed.
- If **"No"** is selected, the popup will close, and the step will remain unchanged.

Sure! Here's a clear and polished rephrased version:

Disable a Step

A toggle switch is located at the top-right corner of each step. When enabled, the step will be executed as part of the workflow. If disabled, the step will be skipped during workflow execution.

Once all the steps are added, click the next button to navigate to the destination section

Destination

Transfer IQ Orchestrator Partner Management Workflows

Workflow Requests File Workflows

← Setup New Workflow Cancel

Info Source Steps Destination Outcomes Review

Destination

Configure where processed files will be delivered.

Folder Path *

Workflow Preview

Partner	Rackspace
Account	RackspacePartnerPWDAccount
Account Type	Partner
Direction	outbound

- ✓ Source
Folder Path : business-unit-folders/sales/racks...
- ✓ copy
Folder path: business-unit-folders/sales/racksp...
- ✓ move
Folder path: business-unit-folders/sales/racksp...
- ✓ compress
Type: ZIP, Folder path: business-unit-folders/sa...
- ✓ encode
Type: BASE64, Folder path: business-unit-fold...

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Outcomes

The Outcomes section consists of two tabs:

1. On Success
2. On Failure.

On Success – Notify the email entered upon successful file transfer.

On Failure – Notify the email entered if the file transfer fails.

Note: Enter Comma Separated Emails to notify multiple emails

Transfer IQ Orchestrator

Partner Management
Workflows

Ask Galileo...
M

Workflow Requests
File Workflows

Setup New Workflow
Cancel

Info
Source
Steps
Destination
Outcomes
Review

Outcome Actions
Define actions to take when the workflow succeeds or fails.

On Failure
On Success

Send Email
Email ID's
mft_admin@backflpt.com, mft_businessuser@backflpt.com
Email ID's should be separated by comma (,)
Previous
Next

Workflow Preview
Partner: Rackspace
Account: RackspacePartnerPwDAccount
Account Type: Partner
Direction: outbound
Source: Folder Path : business-unit-folders/sales/racks...
copy: Folder path: business-unit-folders/sales/racksp...
move: Folder path: business-unit-folders/sales/racksp...
compress: Type: ZIP, Folder path: business-unit-folders/sa...
encode: Type: BASE64, Folder path: business-unit-fold...

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Review

Review all the details provided during the workflow request creation. If everything is correct, the Business User can proceed to create the workflow request. If any changes are needed, use the Previous button to go back and make edits

Transfer IQ Orchestrator

Partner Management
Workflows

Ask Galileo...
M

Workflow Requests
File Workflows

Setup New Workflow
Cancel

Info
Source
Steps
Destination
Outcomes
Review

Key prefix
/sftpfiles/TCSPush

Outcome Actions

On Failure
Send Email
Email Address (s)
mft_admin@backflpt.com, mft_businessuser@backflpt.com

On Success
Send Email
Email Address (s)
mft_admin@backflpt.com, mft_businessuser@backflpt.com

Previous
Create

Workflow Preview
Partner: Rackspace
Account: RackspacePartnerPwDAccount
Account Type: Partner
Direction: outbound
Source: Folder Path : business-unit-folders/sales/racks...
copy: Folder path: business-unit-folders/sales/racksp...
move: Folder path: business-unit-folders/sales/racksp...
compress: Type: ZIP, Folder path: business-unit-folders/sa...
encode: Type: BASE64, Folder path: business-unit-fold...

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TIQ_ORCH_v0.4.1

Once the workflow request creation is done, Business User submits the request to the admin for approval, it becomes visible to all admins under the Workflow Requests tab.

Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...M

Workflow Requests

File Workflows

Workflow Requests


Select


Search Workflows

Search

Create Workflow Request

Count: 4

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Company Push to Par...	Rackspace	outbound	Model	Request C...	MFT Business Us...			Partner	
WR00003	Company Pull from P...	Rackspace	inbound	Model	Closed	MFT Business Us...	10 Sep 2025 at 09:48 PM	MFT Super Admin	Partner	Submit
WR00001	Partner Upload to Co...	Rackspace	inbound	Model	Closed	MFT Business Us...	10 Sep 2025 at 09:29 PM	MFT Super Admin	AWS	
WR00002	Partner Download fro...	Rackspace	outbound	Model	Closed	MFT Business Us...	10 Sep 2025 at 09:30 PM	MFT Super Admin	AWS	

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TIQ_ORCH_v0.4.1

Transfer IQ
Orchestrate

Partner Management

Workflows

Ask Galileo...M

Workflow Requests

File Workflows

Workflow Requests


Select

Search Workflows

Search


Create Workflow Request

Count: 4

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Company Push to Par...	Rackspace	outbound	Model					Partner	
WR00003	Company Pull from P...	Rackspace	inbound	Model				MFT Super Admin	Partner	
WR00001	Partner Upload to Co...	Rackspace	inbound	Model				MFT Super Admin	AWS	
WR00002	Partner Download fro...	Rackspace	outbound	Model				MFT Super Admin	AWS	

Do you want to submit the request
WR00004 to Model?

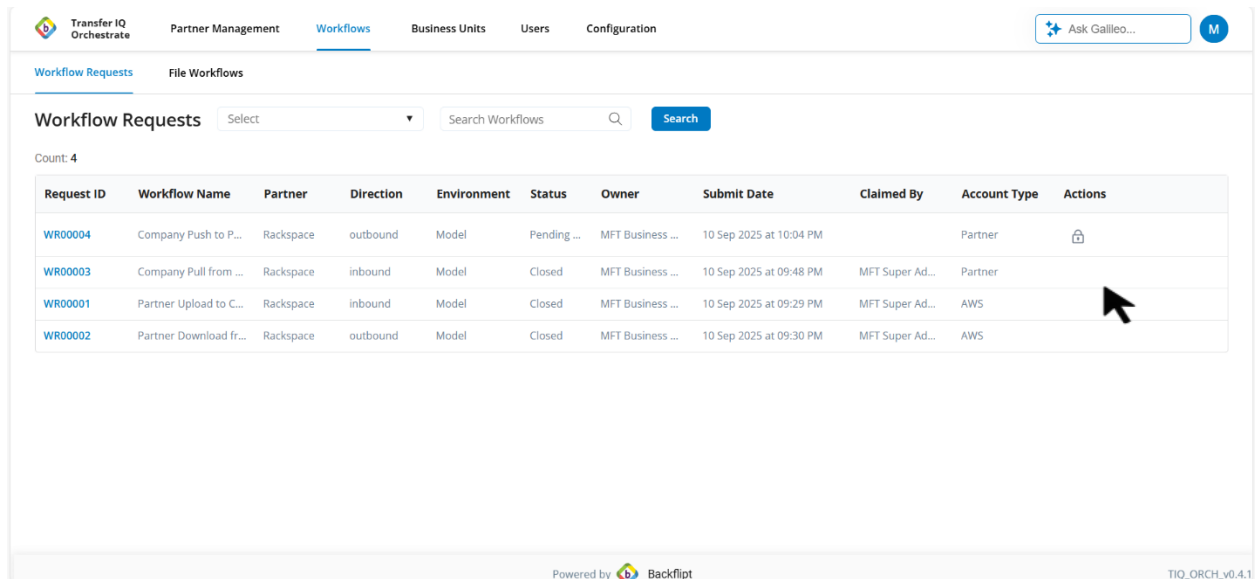
NoYes

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TIQ_ORCH_v0.4.1

Admin Approval – PFTS Outbound Workflow request

An admin can claim the request to take ownership in one of two ways: by clicking the View Request button in the email notification sent after submission, or by locating and claiming the request directly from the Account Onboarding tab.



Transfer IQ Orchestrator

Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Workflow Requests File Workflows

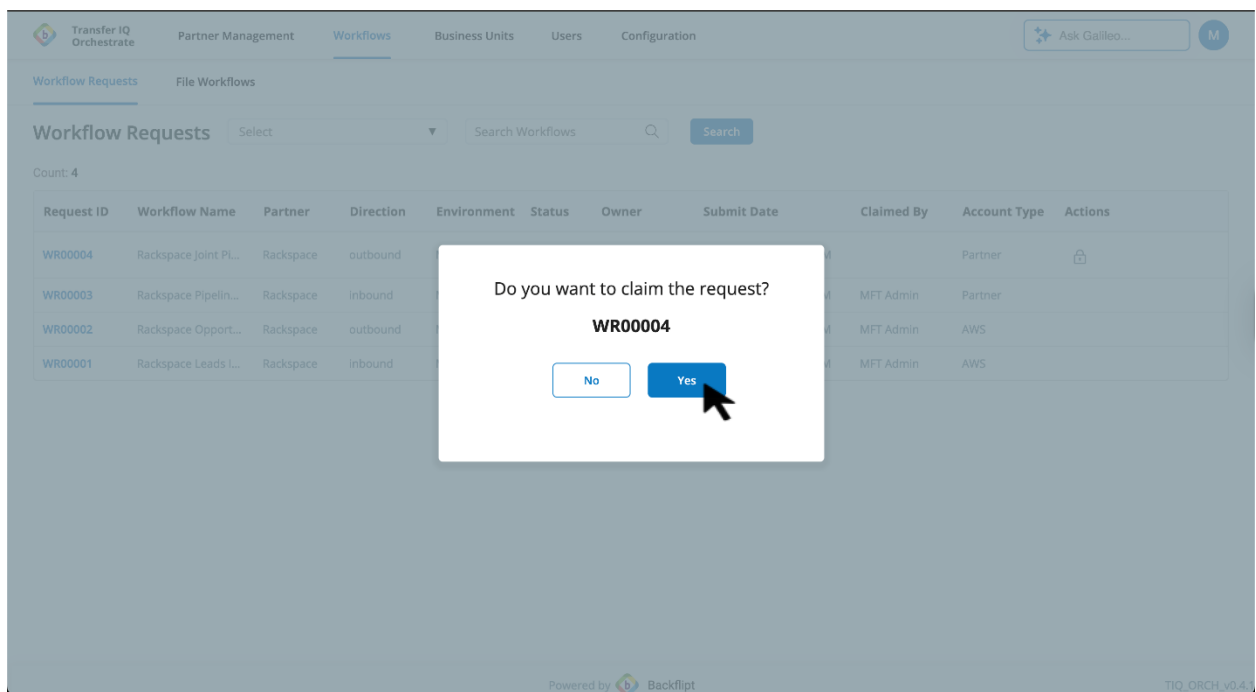
Workflow Requests Select Search Workflows Search

Count: 4

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Company Push to P...	Rackspace	outbound	Model	Pending ...	MFT Business ...	10 Sep 2025 at 10:04 PM		Partner	
WR00003	Company Pull from ...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:48 PM	MFT Super Ad...	Partner	
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	
WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

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TIQ_ORCH_v0.4.1



Transfer IQ Orchestrator

Partner Management Workflows Business Units Users Configuration

Ask Galileo... M

Workflow Requests File Workflows

Workflow Requests Select Search Workflows Search

Count: 4

Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Rackspace Joint PL...	Rackspace	outbound						Partner	
WR00003	Rackspace Pipelin...	Rackspace	Inbound					MFT Admin	Partner	
WR00002	Rackspace Opport...	Rackspace	outbound					MFT Admin	AWS	
WR00001	Rackspace Leads L...	Rackspace	Inbound					MFT Admin	AWS	

Do you want to claim the request?

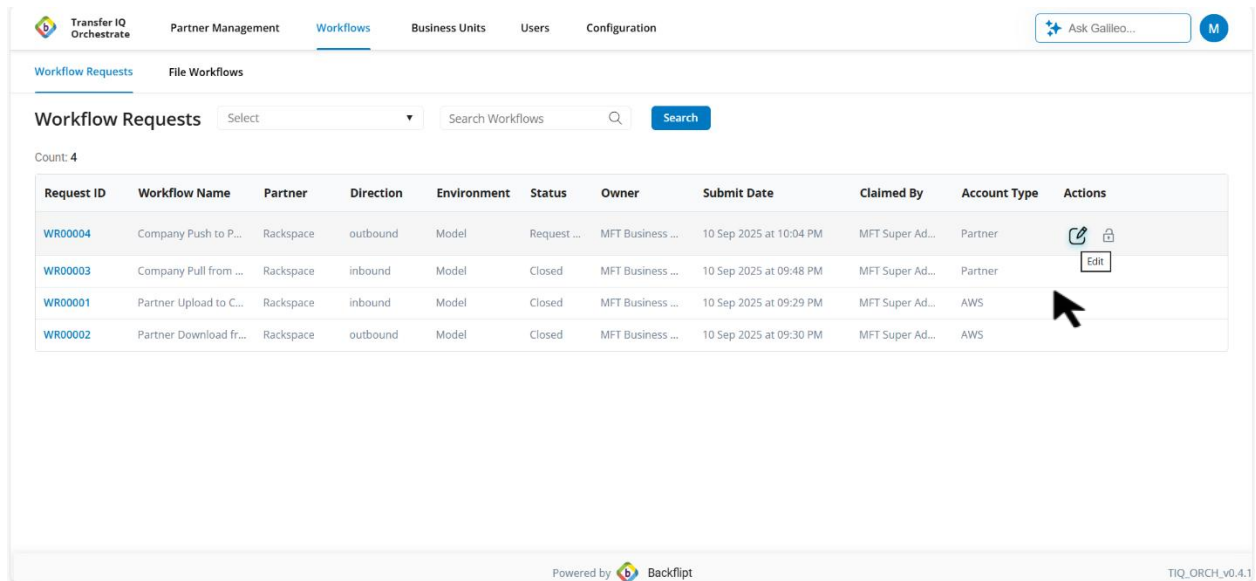
WR00004



No Yes

Powered by Backflip

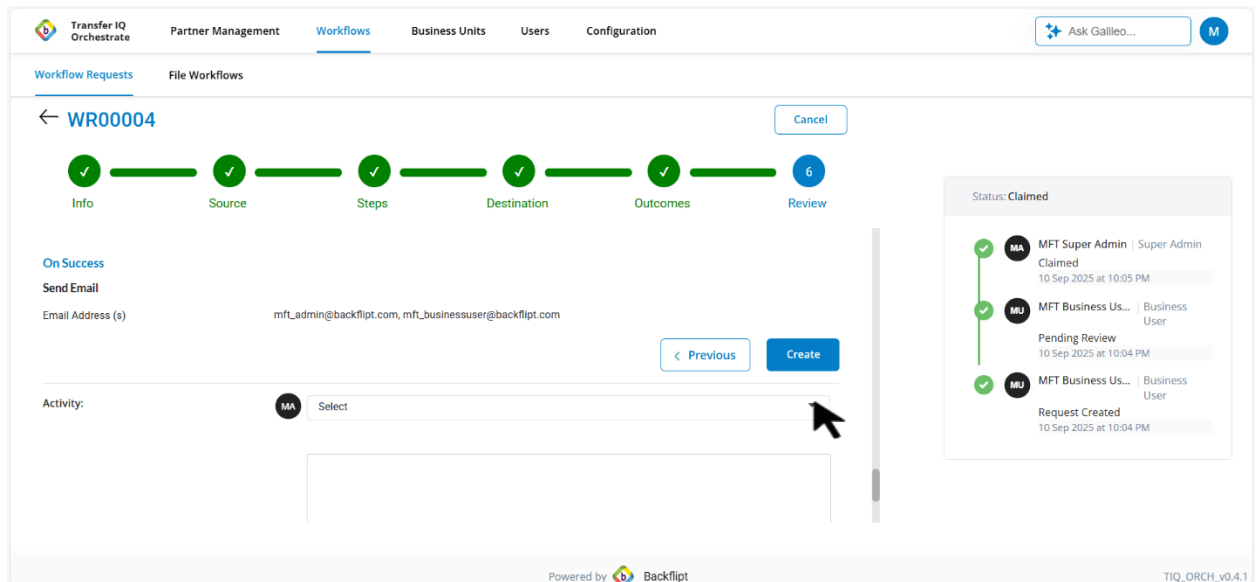
TIQ_ORCH_v0.4.1

After claiming the request, the admin can view all the details provided by the Business User in edit mode.



Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Company Push to P...	Rackspace	outbound	Model	Request ...	MFT Business ...	10 Sep 2025 at 10:04 PM	MFT Super Ad...	Partner	  Edit
WR00003	Company Pull from ...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:48 PM	MFT Super Ad...	Partner	
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	
WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

The admin has the option to review, modify, or update any information if changes are needed. If no changes are required, the details can be left as they are and Click the Create button to create the workflow



← WR00004 Cancel

Info Source Steps Destination Outcomes Review 6

On Success

Send Email

Email Address (s) mft_admin@backflpt.com, mft_businessuser@backflpt.com

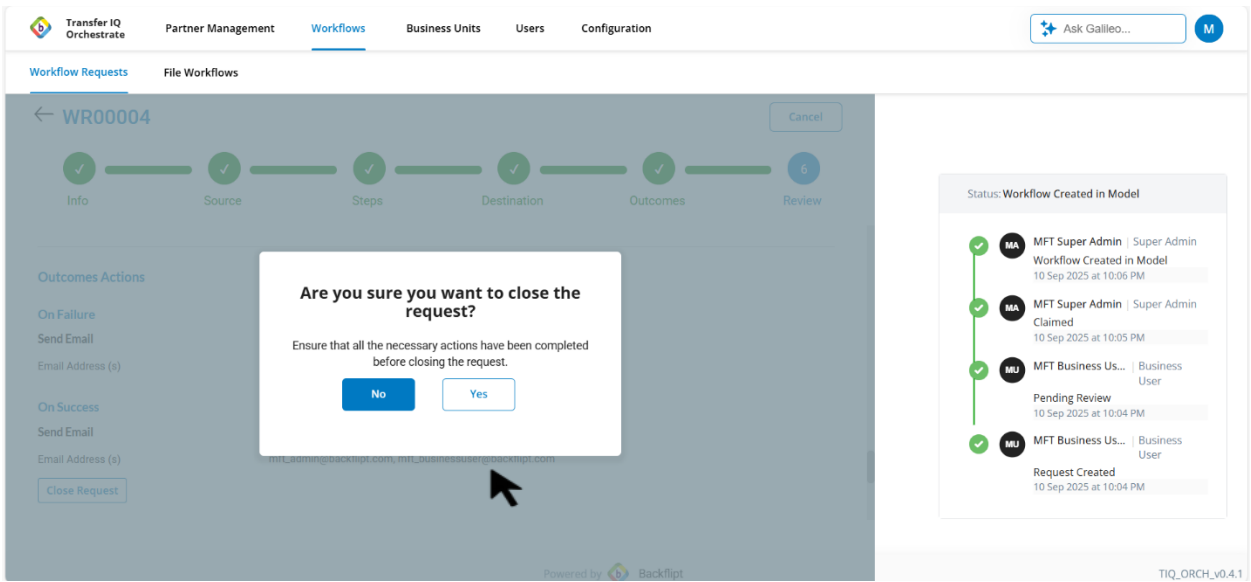
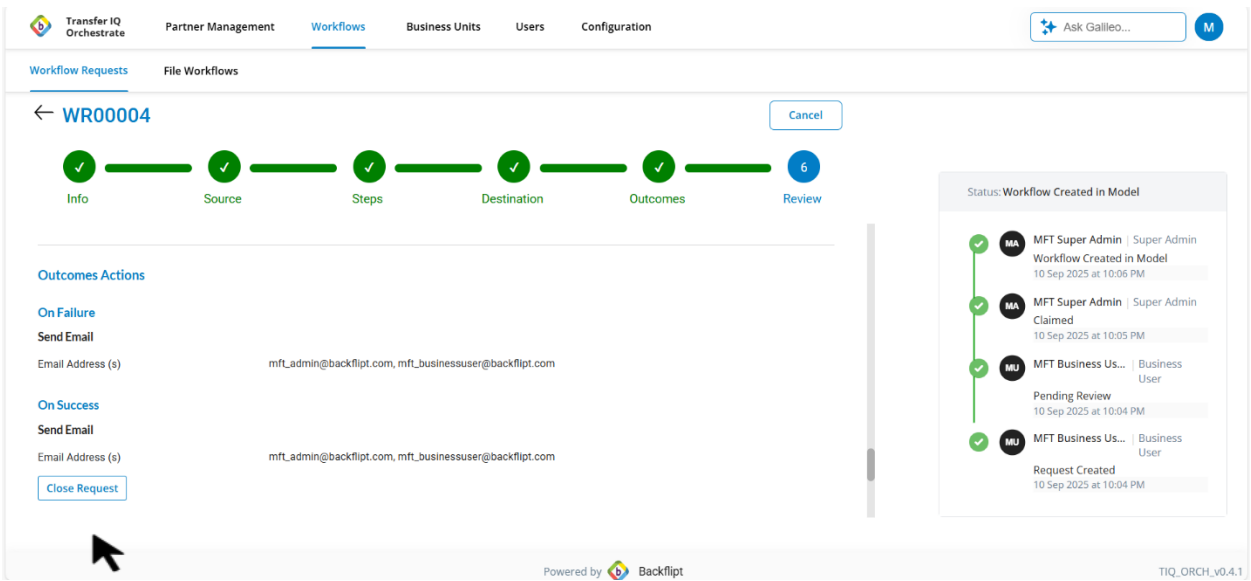
Activity: MA Select

< Previous Create




Status: Claimed

- MA MFT Super Admin | Super Admin Claimed 10 Sep 2025 at 10:05 PM
- MU MFT Business Us... | Business User Pending Review 10 Sep 2025 at 10:04 PM
- MU MFT Business Us... | Business User Request Created 10 Sep 2025 at 10:04 PM

After the workflow is created, the admin can proceed to close the request, as no further action is required. Clicking the **Close Request** button triggers a confirmation prompt.



Once confirmed, the request is marked as **Closed**, and the page redirects back to the Workflow Requests table, where the request is now listed with a status of **Closed**.

<div>  Transfer IQ Orchestrator </div> <div> Partner Management Workflows Business Units Users Configuration </div> <div>  Ask Galileo...  </div>										
<div> Workflow Requests File Workflows </div>										
<div> <div>Workflow Requests</div> <div> <div>Select</div> <div>Search Workflows</div> <div>Search</div> </div> </div>										
Count: 4										
Request ID	Workflow Name	Partner	Direction	Environment	Status	Owner	Submit Date	Claimed By	Account Type	Actions
WR00004	Company Push to P...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 10:04 PM	MFT Super Ad...	Partner	
WR00003	Company Pull from ...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:48 PM	MFT Super Ad...	Partner	
WR00001	Partner Upload to C...	Rackspace	inbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:29 PM	MFT Super Ad...	AWS	
WR00002	Partner Download fr...	Rackspace	outbound	Model	Closed	MFT Business ...	10 Sep 2025 at 09:30 PM	MFT Super Ad...	AWS	

File Transfers

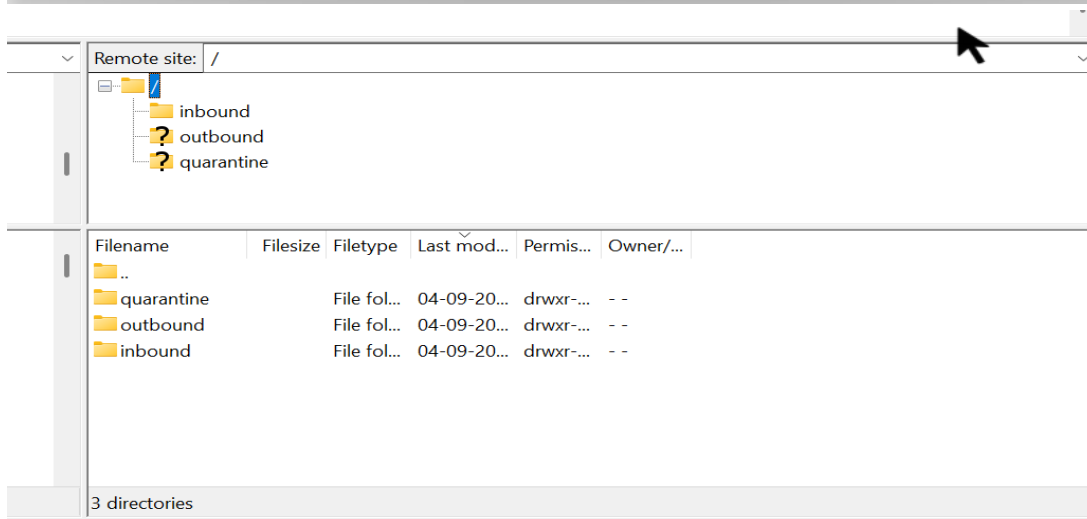
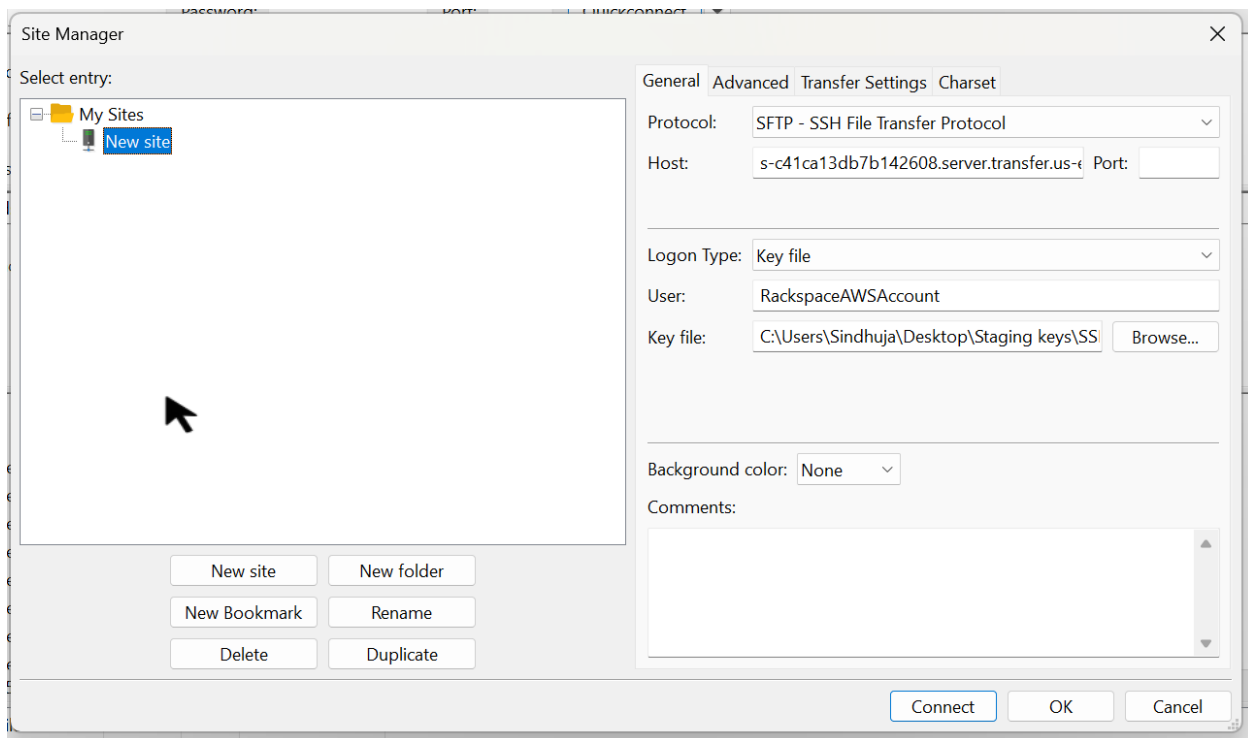
File Transfer for AWS Transfer Family Account Inbound Workflow

All incoming files from the partner to the company's business unit folder on the company's server will come under AWS Inbound File transfers

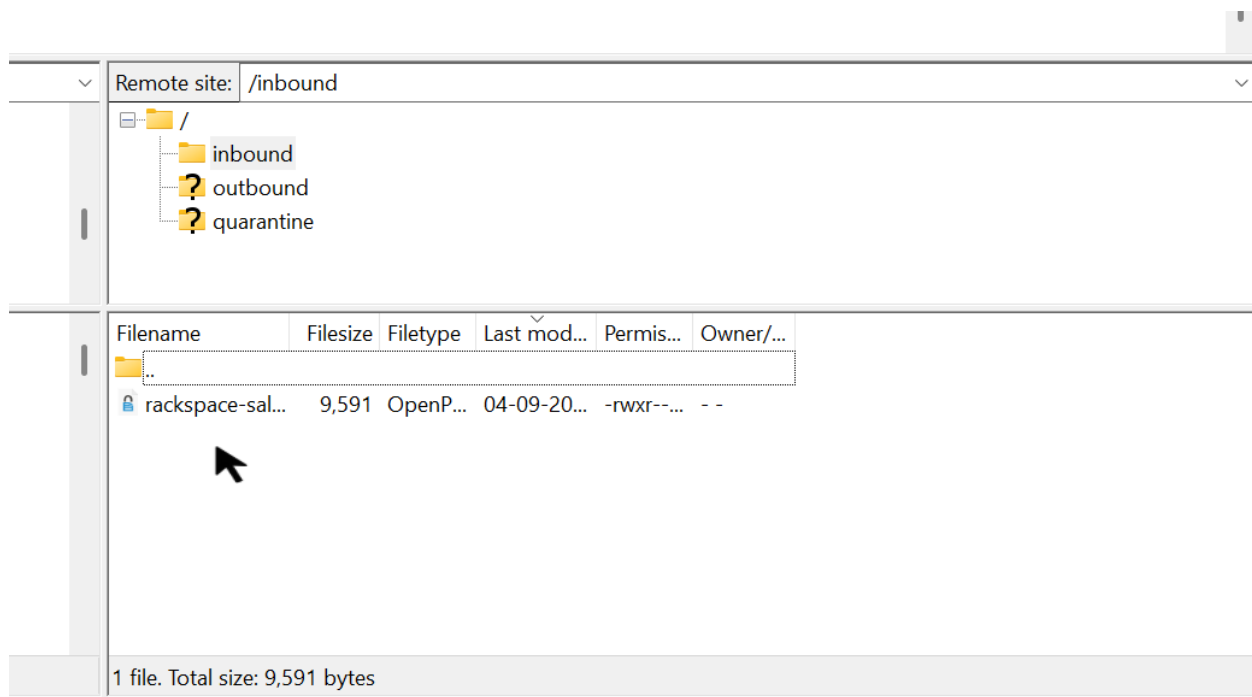
In AWS Inbound File Transfer, the partner connects to the company server using an external client (e.g., FileZilla) using the following details

- Server SFTP endpoint
- SSH private key
- Username.

Click the Connect button to connect to the server



1. Once the partner connects to the Server, Partner uploads files into the inbound folder within the user account folder (for example: efts - folder/{partneraccount}/inbound)

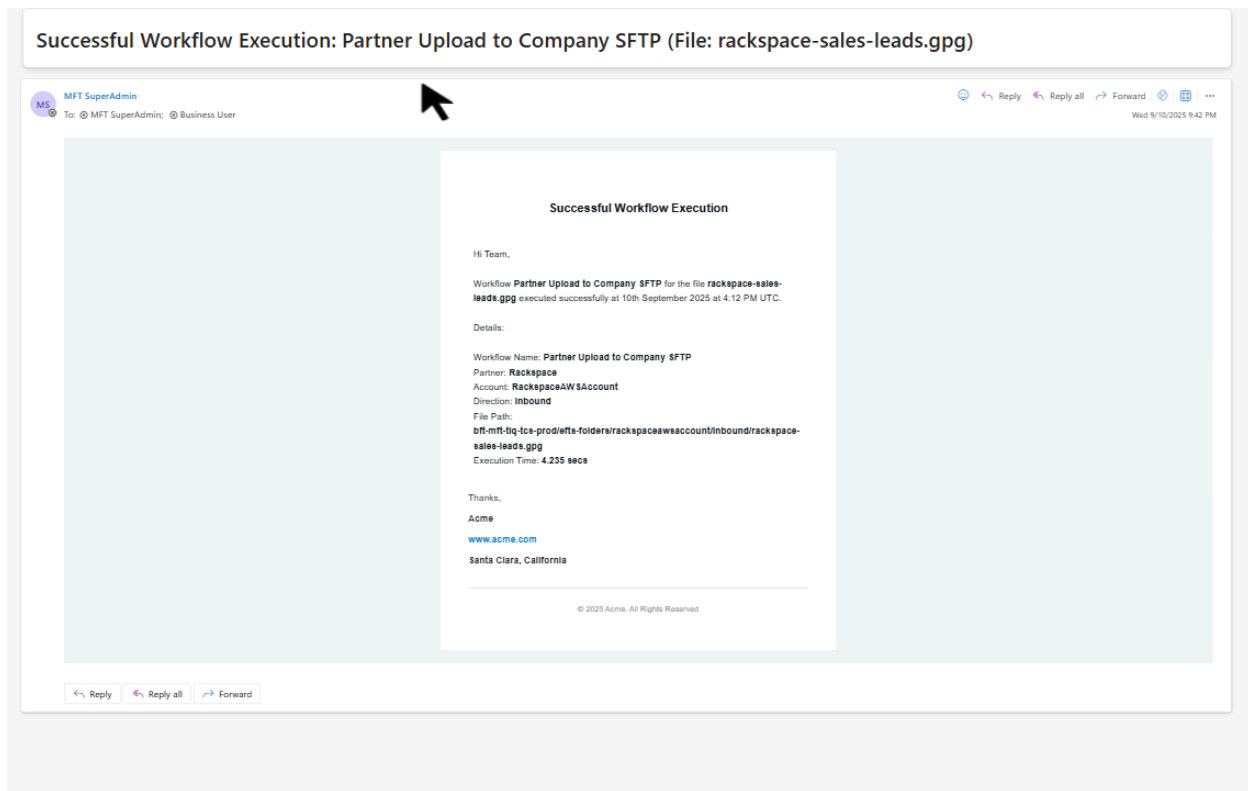


2. This folder serves as the source location as it is specified during workflow creation.
3. Once a file is placed in the source folder, all workflows associated with that user account are evaluated. If there is a single workflow, it is triggered immediately. If multiple workflows exist for the account, the best matching workflow based on the uploaded file will be triggered and The steps defined in the chosen workflow are executed.
4. Finally, the processed file is placed into the destination folder within the company's destination bucket. For example, the destination path could be:
Bucket/BusinessUnitFolder/Partner/partneraccount/inbound, as specified during the workflow setup.

Workflow Execution Status Email for AWS Inbound File Transfer

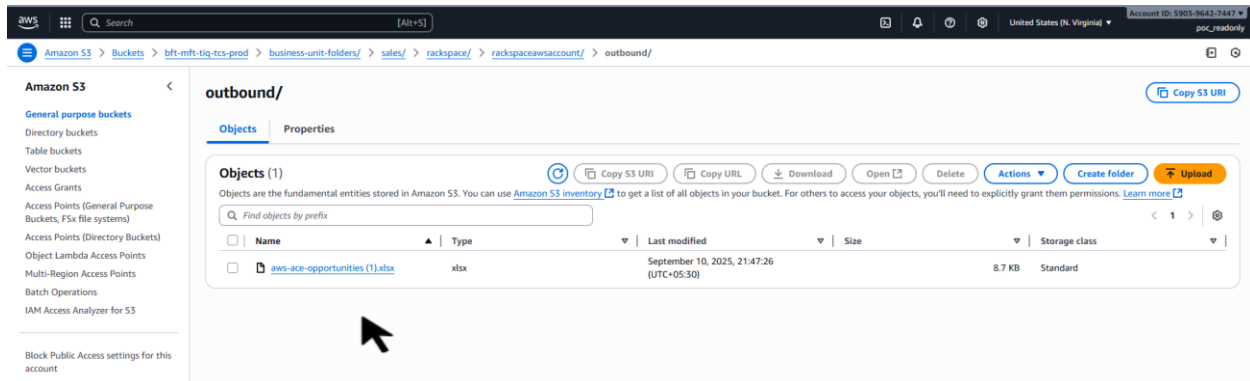
- If the file transfer and workflow execution are successful, an email notification is sent to the addresses specified in the **"OnSuccess"** tab of the *Outcomes* section during workflow creation.

- If the transfer or workflow fails, an email is sent to the addresses specified in the **"OnFailure"** tab of the *Outcomes* section.
- If no email addresses are provided in either section, **no notifications** will be sent.



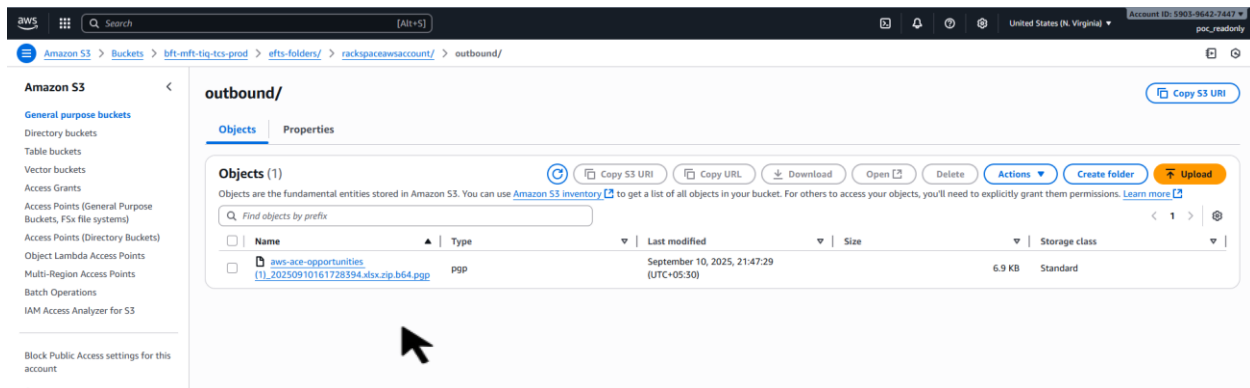
File Transfer for AWS Transfer Family Account Outbound Workflow

1. All outgoing files from the company to the partner for AWS Accounts come under AWS Outbound File Transfers.
2. For AWS Outbound File Transfers, the company accesses the AWS console using the Business User login credentials.
3. Once the login is successful, the Business User uploads the file to the S3 bucket within the business unit folder (for example: Bucket/BusinessUnitFolder/Partner/partneraccount/outbound). This folder serves as the source location, as it is specified during workflow creation.



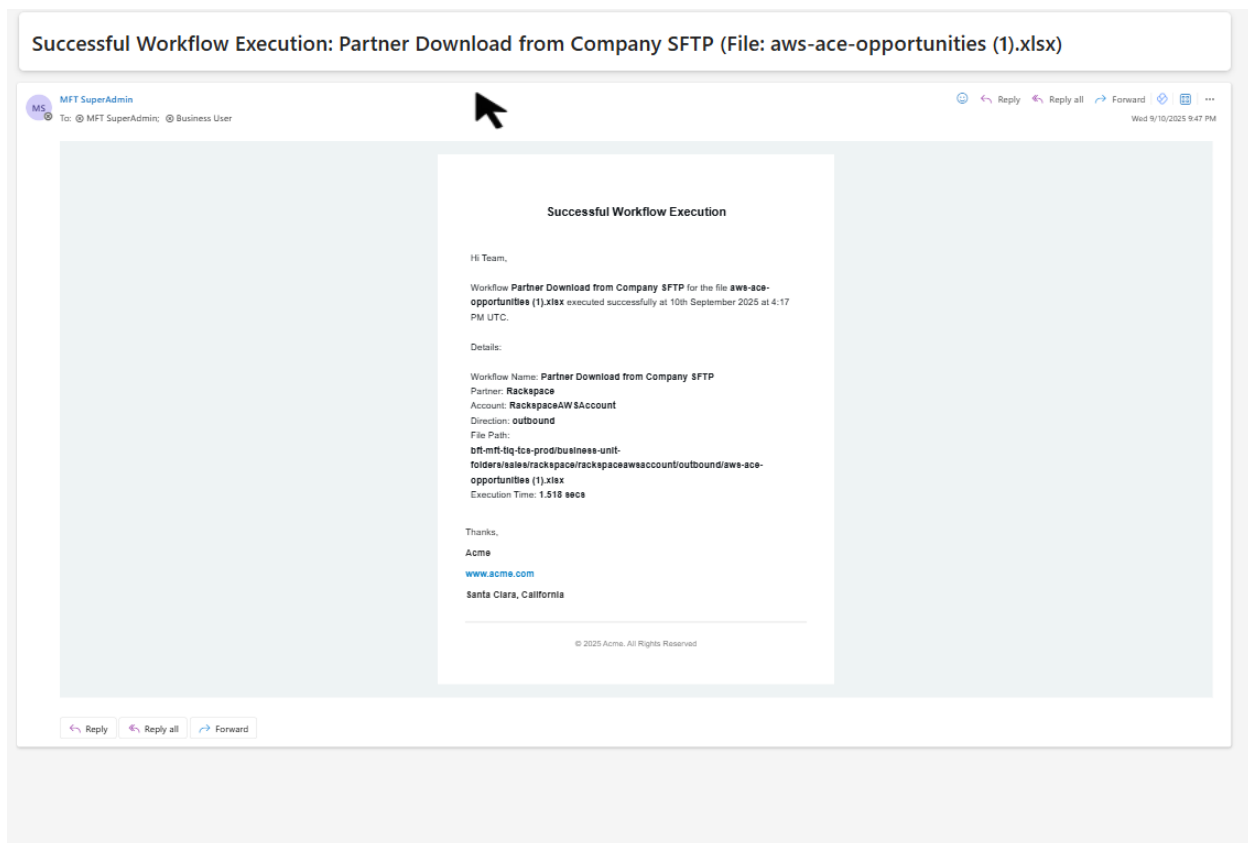
- When a file is placed in the source folder, all workflows associated with that user account are evaluated. If only one workflow exists, it is triggered immediately. If multiple workflows are available, the best matching workflow based on the file is triggered, and the steps defined in the selected workflow are executed.

Finally, the processed file is transferred to the destination folder or endpoint, as defined in the workflow setup.



Workflow Execution Status Email for AWS Outbound File Transfer

- If the file transfer and workflow execution are successful, an email notification is sent to the addresses specified in the **"OnSuccess"** tab of the *Outcomes* section during workflow creation.
- If the transfer or workflow fails, an email is sent to the addresses specified in the **"OnFailure"** tab of the *Outcomes* section.



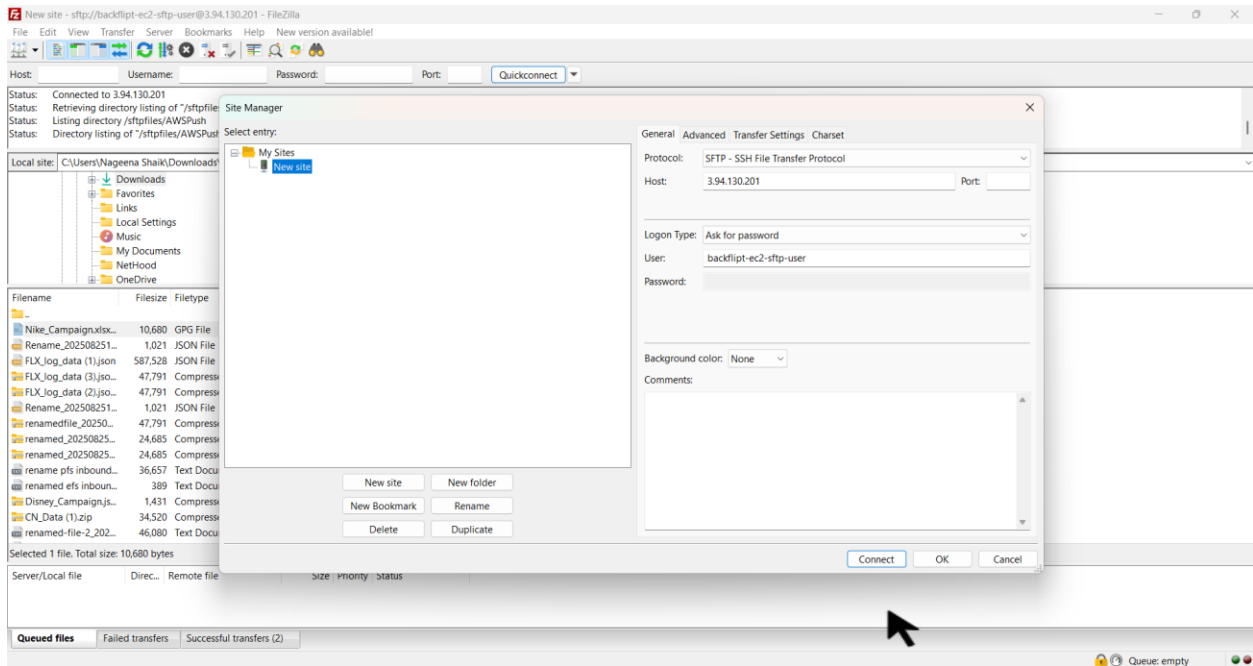
If no email addresses are provided in either section, **no notifications** will be sent

File Transfer for Partner Hosted Account Inbound Workflow

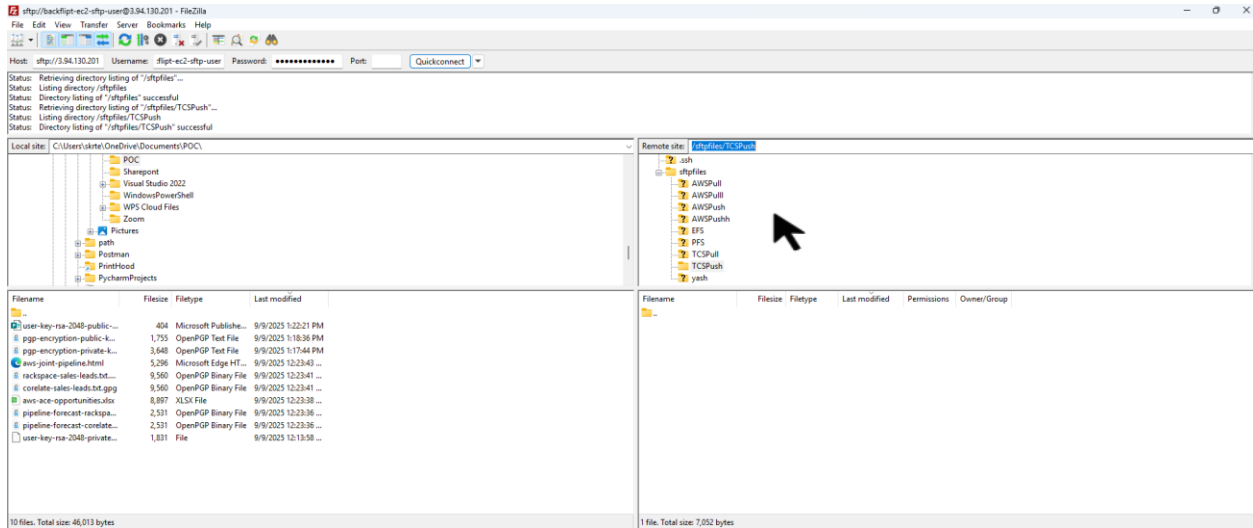
All incoming files from the partner's external server to the company's s3 bucket come under **PFTS Inbound File Transfers**.

In PFTS Inbound File Transfers, the partner connects to their server using an external client (e.g., FileZilla) with the following details:

- Server SFTP endpoint
- SSH private key/Password - Based on Login Method Selected
- Username



Once connected, the partner uploads files to the source folder. This source folder is provided by the partner to the company, and the company creates workflows based on this specified folder.



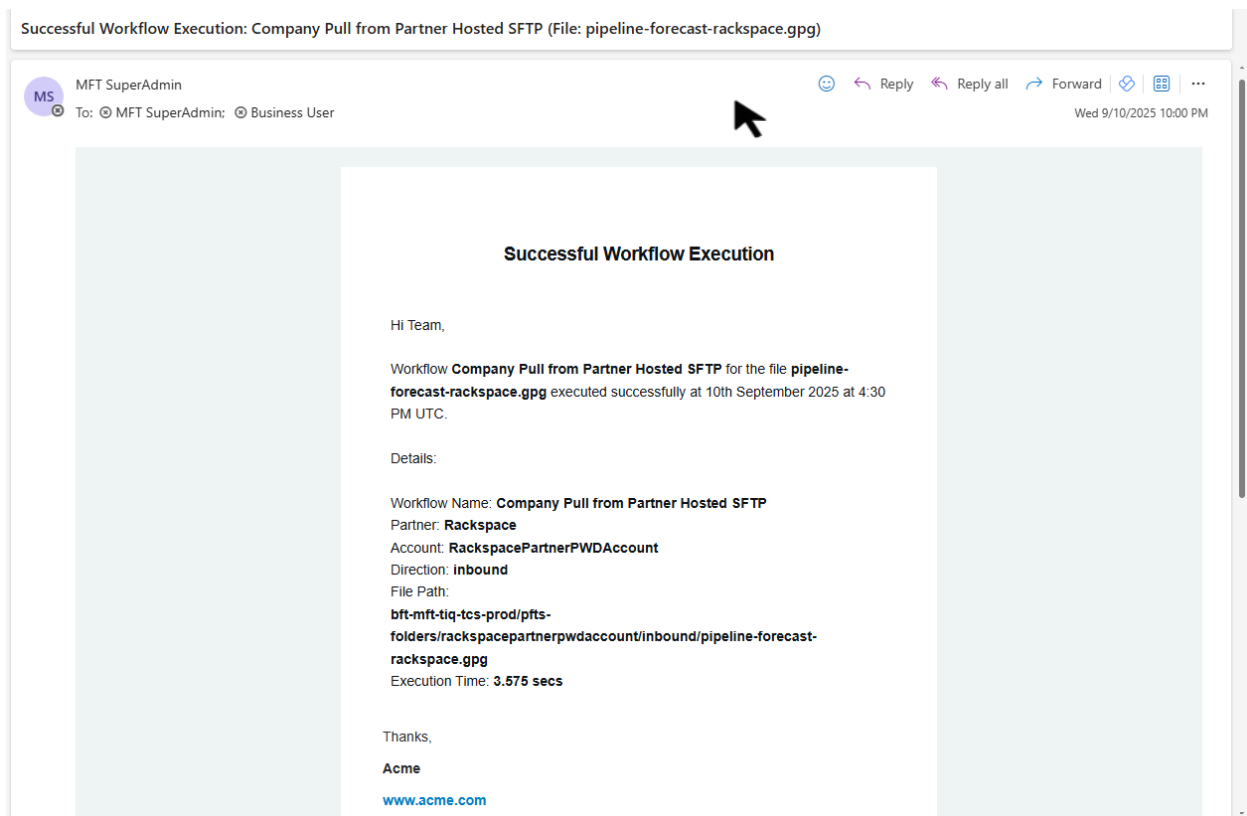
Workflows in PFTS Inbound File Transfers are triggered according to a scheduled time set during workflow creation. Files are pulled from the partner's server on this scheduled basis.

1. When the scheduled time arrives, all workflows associated with the account are evaluated. If there is only one workflow, it is triggered immediately. If multiple workflows exist, the best matching workflow based on the uploaded file is triggered.

2. Upon workflow trigger, the file is pulled from the partner's server into the company's S3 bucket at the path: `pfts-folders/partneraccount/inbound`.
3. After the file is pulled into the company's bucket, the steps defined in the selected workflow are executed.
4. Finally, the processed file is placed into the destination folder within the company's destination bucket. For example, the destination path might be: `Bucket/BusinessUnitFolder/Partner/partneraccount/inbound`, as specified during the workflow setup.

Workflow Execution Status Email for PFTS Inbound File Transfers

- If the file transfer and workflow execution are successful, an email notification is sent to the addresses specified in the **"OnSuccess"** tab of the *Outcomes* section during workflow creation.

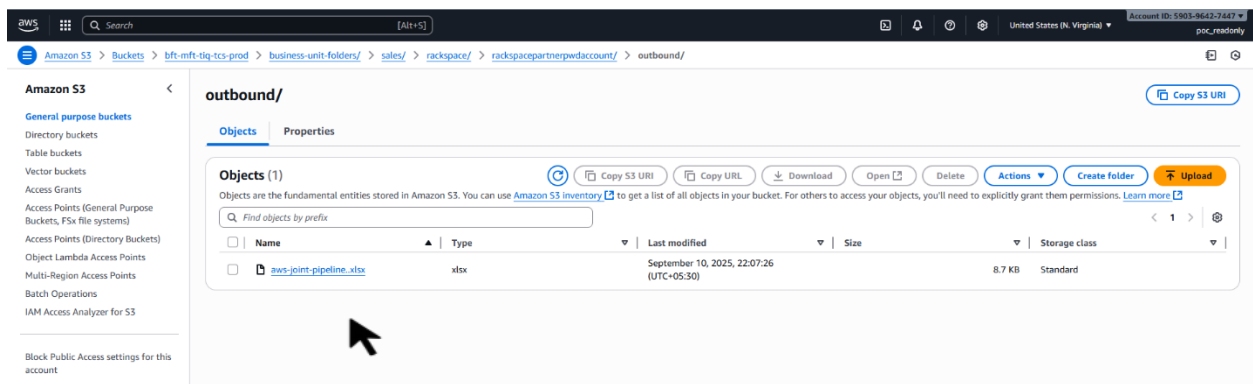


- If the transfer or workflow fails, an email is sent to the addresses specified in the **"OnFailure"** tab of the *Outcomes* section.
If no email addresses are provided in either section, **no notifications** will be sent

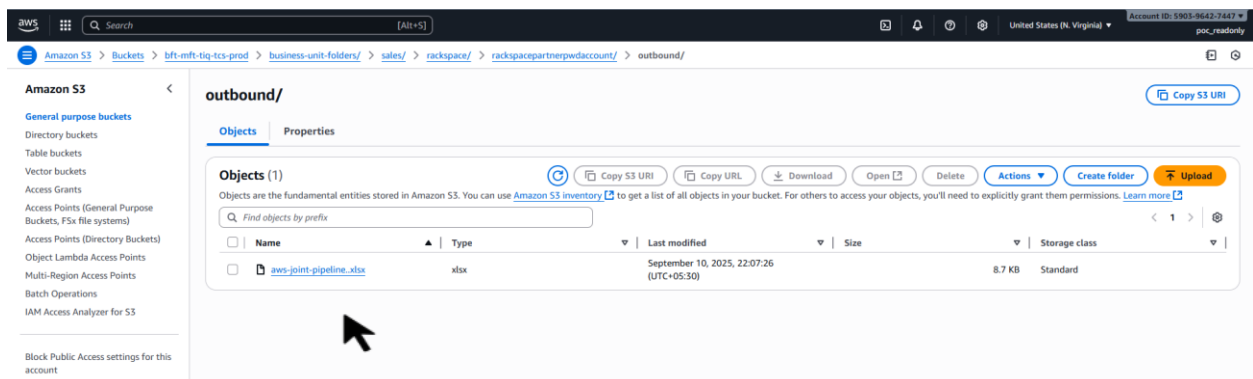
File Transfer for Partner Hosted Account Outbound Workflow

All outgoing files from the company's S3 bucket to the partner's external server come under **PFTS Outbound File Transfers**.

5. In PFTS Outbound File Transfers, the company **pushes** files from source folder in its **Company's** S3 bucket to the partner's external server. This process is **not scheduled** — the file transfer is **triggered immediately** when a file is placed in the source folder.
6. For AWS Outbound File Transfers, the company accesses the AWS console using the Business User login credentials.
7. Once the login is successful, the Business User uploads the file to the S3 bucket within the business unit folder (for example: Bucket/BusinessUnitFolder/Partner/partneraccount/outbound). This folder serves as the source location, as it is specified during workflow creation.



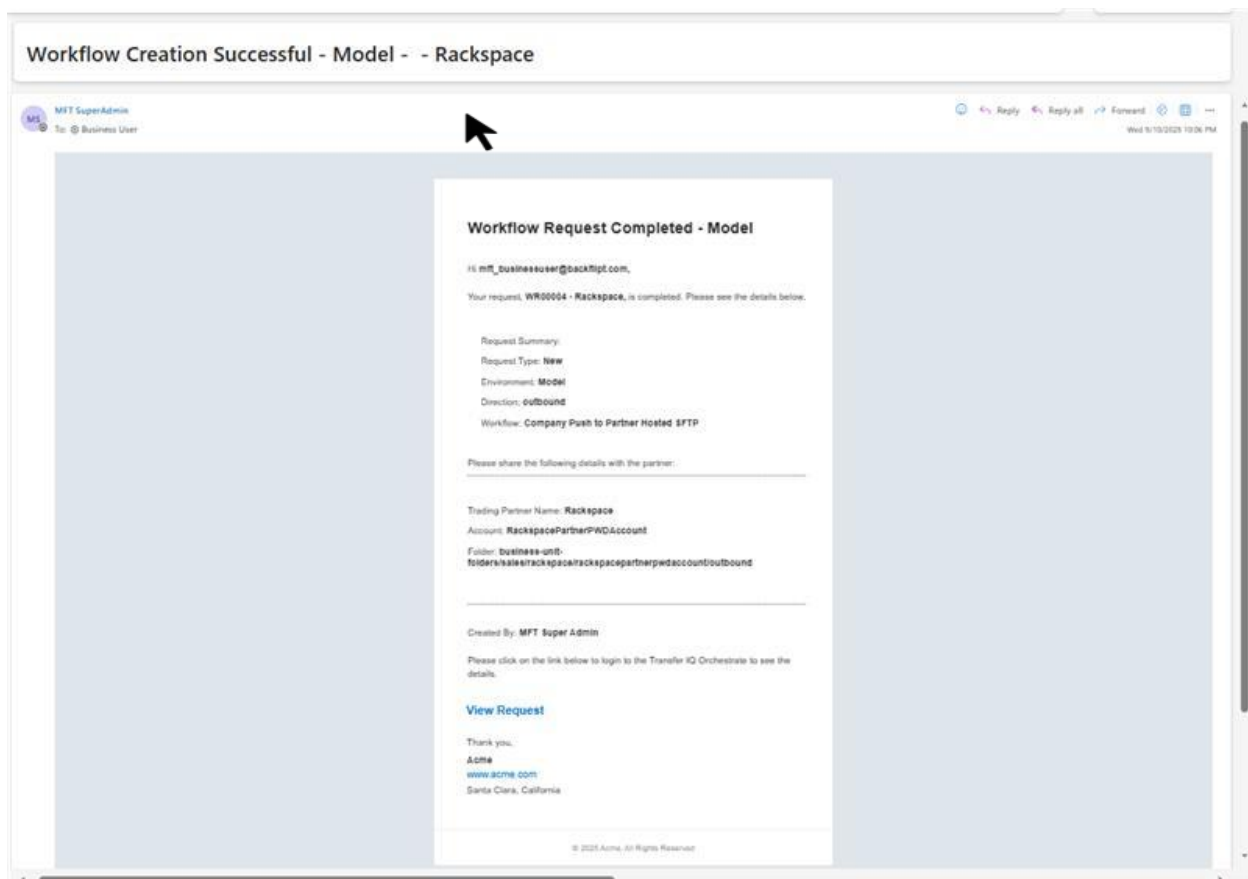
8. Once the workflow is triggered, the file is pushed from the company's S3 bucket (Business Unit folder) to the company's PFTS S3 bucket at the following path: **pfts-folders/partneraccount/outbound**



9. After the file has been successfully transferred to the PFTS S3 bucket, the steps defined in the selected workflow continue execution.
10. Finally, the processed file is delivered to the destination folder on the partner's server. This destination path is provided by the partner and configured by the company during the workflow setup in the "Destination" section.

Workflow Execution Status Email for PFTS Outbound File Transfer

- If the file transfer and workflow execution are successful, an email notification is sent to the addresses specified in the "**OnSuccess**" tab of the *Outcomes* section during workflow creation.



- If the transfer or workflow fails, an email is sent to the addresses specified in the "**OnFailure**" tab of the *Outcomes* section.
If no email addresses are provided in either section, **no notifications** will be sent

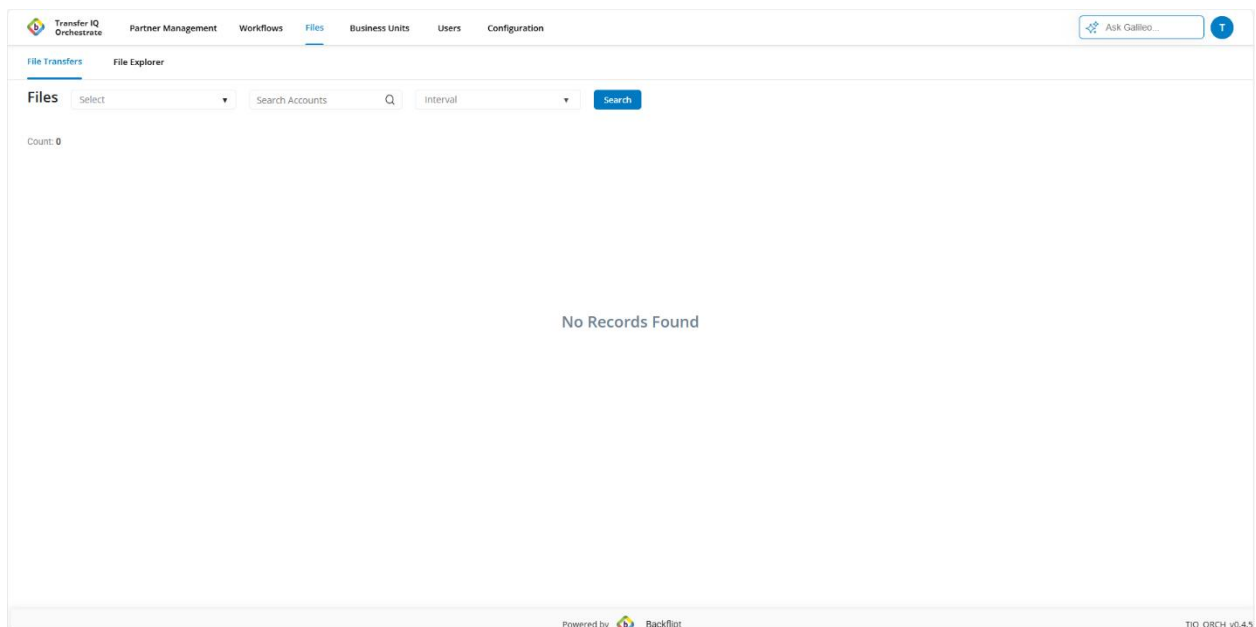
Files

The File tab consists of two tabs file transfers and file explorer. It allows users to upload files via file explorer tab and monitor the uploaded file transfer status in file transfer tab.

File Transfer:

The File Transfers tab provides a summary of all file transfers performed through the system. It allows users to monitor inbound and outbound file activities, check transfer details, and verify whether each transfer was successful or not. This section is mainly used for tracking and troubleshooting file transfers.

Upon clicking on the File tab user will be redirected to the Files>File Transfers section. When no file transfers are done, initially no records will be displayed.



Admin Screen:

Admin can view the file transfer status of all business units. Once file transfer is completed, user can view the details related to the transferred status of the file

The screenshot shows the Admin Screen of the Transfer IQ Orchestrator. The top navigation bar includes links for Partner Management, Workflows, Files, Business Units, Users, and Configuration. The 'Files' tab is selected. Below the navigation bar, there is a search bar with a dropdown menu for 'Files' and a 'Search' button. The main content area displays a table with the following columns: File Name, File Size, Account Name, Account Type, Direction, Date Time, Status, Business Unit, and Protocol. A single file is listed: 'aws-ace-opportunities.xlsx' with a size of 8897, transferred from 'RackspaceAWSAccount' to 'AWS' via 'outbound' direction on '15 Sep 2025 at 09:42 PM' with a 'Success' status, using 'SFTP' protocol. A mouse cursor is pointing at the 'File Name' column header. The footer indicates the interface is 'Powered by Backflip' and the version is 'TIQ_ORCH_v0.4.5'.

File Name	File Size	Account Name	Account Type	Direction	Date Time	Status	Business Unit	Protocol
aws-ace-opportunities.xlsx	8897	RackspaceAWSAccount	AWS	outbound	15 Sep 2025 at 09:42 PM	Success	Sales	SFTP

Business User Screen:

Business User can view the file transfer status of only the associated business unit. Once file transfer is completed, user can view the details related to the transferred status of the file by clicking on the filename

The screenshot shows the Business User Screen of the Transfer IQ Orchestrator. The top navigation bar is identical to the Admin Screen. The 'Files' tab is selected. Below the navigation bar, there is a search bar with a dropdown menu for 'Files' and a 'Search' button. The main content area displays a table with the following columns: File Name, File Size, Account Name, Account Type, Direction, Date Time, Status, Business Unit, and Protocol. A single file is listed: 'aws-ace-opportunities.xlsx' with a size of 8897, transferred from 'RackspaceAWSAccount' to 'AWS' via 'outbound' direction on '15 Sep 2025 at 09:42 PM' with a 'Success' status, using 'SFTP' protocol. A mouse cursor is pointing at the 'File Name' column header. The footer indicates the interface is 'Powered by Backflip' and the version is 'TIQ_ORCH_v0.4.5'.

File Name	File Size	Account Name	Account Type	Direction	Date Time	Status	Business Unit	Protocol
aws-ace-opportunities.xlsx	8897	RackspaceAWSAccount	AWS	outbound	15 Sep 2025 at 09:42 PM	Success	Sales	SFTP

The Files table in the File Transfers tab consists of several columns, each providing specific details about the transfer.

- **File Name:** This column displays the name of the file that has been transferred. It helps users quickly identify which specific file is part of the transfer. If the field is empty, it means no file name was captured for that record.
- **File Size:** The File Size column shows the size of the file, which ensures that the complete file was transferred successfully.
- **Account Name:** This column indicates the name of the account involved in the transfer. It helps in identifying which external partner or internal account the file belongs to, making tracking easier.
- **Account Type:** This column specifies the type of account associated with the transfer. For example, it may show Partner or AWS account type. This information helps in classifying the transfer source or destination.
- **Direction:** This column highlights whether the file transfer is inbound or outbound. Inbound transfers refer to files coming into the system, while outbound transfers represent files being sent out to partners or external systems.
- **Date Time:** This column records the exact date and time when the transfer occurred. Having a timestamp helps in tracking the file movement.
- **Status:** This column shows the outcome of the transfer, with three possible values:
 1. **Success** → The file transfer is completed successfully. This means all the transformation steps have been executed without any errors, and the file has been transferred correctly.
- When the file transfer is successful, the detailed view shows all the sections including workflow execution details, workflow information, partner and account details, SFTP information, transformation steps, and the destination section. Each transformation step (like copy, compress, encrypt, etc.) will also display its status and duration.

Transfer ID: 20230915181200223

Partner Management

Workflows

Files

File Transfers

File Explorer

Files

Search

Search Accounts

Q

Internal

Search

Count: 1

File Name	File Size	Account Name	Account Type
aws-ace-opportunities.xlsx	8897	RackpaceAWSAccount	AMS

aws-ace-opportunities.xlsx

File Name

Business Unit Folder/rackpace/rackpaceawsaccount/inbound

File Path

8897

File Size

15 Sep 2023 at 09:42 PM

Date Time

SFTP

Protocol

1817 ms

Duration

Workflow Information

Direction

inbound

Workflow Name

Partner Download from Company SFTP

Partner and Account Information

Business Unit

Sales

Partner Name

Rackpace

Account Type

AMS

Account Name

RackpaceAWSAccount

SFTP Information

SFTP Server Name

transferlog_ftp_server

SFTP Server ID

s43a007488b3b4a6f6a

Transformation Steps

1. Copy

Status

Success

Step Duration

292 ms

2. Move

Status

Success

Step Duration

117 ms

3. Compress

Status

Success

Step Duration

328 ms

4. Encode

Status

Success

Step Duration

383 ms

5. pgpencrypt

Status

Success

Step Duration

294 ms

6. Tag

Status

Success

Step Duration

37 ms

7. Rename

Status

Success

Step Duration

123 ms

Destination

File Name

aws-ace-opportunities_20230915181200223.xlsx.zip.644.gpg

Folder Path

SFTP Folder/rackpaceawsaccount/inbound

2. **Failure** → If any transformation step fails during the process, the file is not transferred successfully. In this case, the entire status of the transfer is marked as Failure.
- If the file transfer has failed, the detailed view still shows all the sections. In the transformation steps, you can clearly see which specific step has failed, along with the reason for failure. This helps in identifying the exact issue that caused the transfer to fail.

Transfer ID: 202309151101071

Partner ManagementWorkflowsFiles

File TransfersFile Explorer

Files

SelectSearch AccountsIntervalSearch

Count: 3

File Name	File Size	Account Name	Account Type
rackpace-sales-leads.txt.gpg	9560	RackpaceAWSAccount	AMS
aws-joomla.gpg.html	5296	RackpacePartnerPaaSAccount	Partner
aws-ace-opportunities.xlsx	8897	RackpaceAWSAccount	AMS

rackpace-sales-leads.txt.gpg

Workflow Execution Details

StatusFailure

Failure ReasonTruncated source

File Namerackpace-sales-leads.txt.gpg

File PathSFTP Folder/rackpaceawsaccount/inbound

File Size9560

Date Time15 Sep 2023 at 11:01 AM

ProtocolSFTP

Workflow Information

DirectionInbound

Workflow NamePartner Upload to Company SFTP

Partner and Account Information

Business UnitSales

Partner NameRackspace

Account TypeAWS

Account NameRackspaceAWSAccount

SFTP Information

SFTP Server Nametransferlog_ftp_server

SFTP Server IDS43A007488B3B4A6F6A

Transformation Steps

1. Scan

StatusSuccess

Step Duration88 ms

2. Copy

StatusSuccess

Step Duration113 ms

3. Move

StatusSuccess

Step Duration122 ms

4. PGPDecrypt

StatusSuccess

Step Duration1694 ms

5. Decode

StatusSuccess

Step Duration369 ms

6. Decompress

StatusFailure

Failure Reason

3. **NA** → This status appears when the uploaded file does not match the required file name pattern or when no workflow is triggered. Since the transformation steps are not executed in such cases, the transfer is marked as NA.

- When the status is NA, it means no workflow was triggered because the file did not match the required file name pattern. In this case, the detailed view only shows the Workflow Execution Details and Workflow Information sections. Other sections like partner details, transformation steps, and destination are not shown.

The screenshot displays the Transfer IQ Orchestrator interface. The top navigation bar includes 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. The 'Files' tab is active, showing a 'File Explorer' section with a search bar and a table of file transfers. The table has columns: File Name, File Size, Account Name, Account Type, and Direction. A mouse cursor points to the 'Account Name' column. To the right, a detailed view for a file with status 'NA' is shown, containing 'Workflow Execution Details' and 'Workflow Information' sections. A mouse cursor points to the 'Workflow Information' section.

File Name	File Size	Account Name	Account Type	Direction
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound
---	---	---	Partner	Inbound

Workflow Execution Details

Status	NA
File Name	---
File Path	---
File Size	---
Date Time	16 Sep 2025 at 08:38 AM
Protocol	SFTP

Workflow Information

Direction	Inbound
Workflow Name	---

- **Business Unit:** This column displays the business unit of the business user who has submitted the workflow request. It provides clarity on which business unit is responsible for the transfer and ensures accountability within the organization.
- **Protocol:** This column displays the protocol used for transferring the file, such as **SFTP**. It indicates the method by which the file was transmitted securely, ensuring compliance with security and integration standards.

The Filters in the File Transfers tab help users quickly view files based on their transfer status. The available options are:

- **Successful File Transfers** – Shows only the files that were transferred successfully, with all transformation steps completed.
- **Failed File Transfers** – Displays files where the transfer failed, allowing users to check which step went wrong.
- **Workflows Not Found** – Lists files marked as NA, meaning no workflow was triggered because the file did not match the required pattern.
- **Check All** – Selects all the above filters together, so users can view every type of file transfer in one go.

The screenshot shows the 'Files' section of the Transfer IQ Orchestrator interface. At the top, there are navigation tabs: 'Transfer IQ Orchestrator', 'Partner Management', 'Workflows', and 'Files'. Below these, there's a 'File Transfers' section with a 'File Explorer' sub-section. A search bar is visible with the text 'Search Accounts' and a 'Search' button. Below the search bar, there's a table with columns: 'File Name', 'Account Name', 'Account Type', 'Direction', 'Date Time', 'Status', and 'Protocol'. The table shows two rows of data. A mouse cursor is pointing at the 'File Name' column header.

File Name	Account Name	Account Type	Direction	Date Time	Status	Protocol
aws-joint-pipeline.html	RackspacePartnerPwAccount	Partner	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP
aws-ace-opportunities.xlsx	RackspaceAWSAccount	AWS	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP

Powered by Backflipit

TIQ_ORCH_v0.4.5

The Search bar allows users to quickly find specific file transfers without scrolling through the entire list. Users can search across multiple columns, including Source File Name, Source File Size, Account Name, Account Type, Direction, Protocol, and Business Unit Name. By entering a keyword or value, the system filters the records and displays only the matching results, making it easier to locate the required file transfer.

The screenshot shows the 'Files' section of the Transfer IQ Orchestrator interface. The search bar now contains the text 'aws-joint-pipeline.html'. The table below shows only one row of data. A mouse cursor is pointing at the 'Account Name' column header.

File Name	File Size	Account Name	Account Type	Direction	Date Time	Status	Protocol
aws-joint-pipeline.html	5296	RackspacePartnerPwAccount	Partner	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP

Powered by Backflipit

TIQ_ORCH_v0.4.5

The Interval filter allows users to view file transfers within a specific time range. It helps narrow down results based on when the transfers occurred. The available options are:

- **Recent** – Displays the most recent file transfers.

- **Today so far** – Shows transfers that happened during the current day.
- **Yesterday** – Lists transfers completed the previous day.
- **This week so far** – Displays all transfers from the start of the current week until now.
- **Last week** – Shows transfers from the previous week.
- **This month so far** – Lists transfers from the beginning of the current month up to the present time.
- **Last Month** – Shows transfers from the entire previous month.
- **This quarter so far** – Displays all transfers from the start of the current quarter up to now.
- **Last Quarter** – Shows transfers from the entire previous quarter.
- **This year so far** – Lists transfers from the beginning of the current year until now.
- **Last Year** – Shows transfers from the entire previous year.

Transfer IQ Orchestrator

Partner Management
Workflows
Files

Ask Galileo...

File Transfers
File Explorer

Files
Select
Search Accounts
Interval
Search

Count: 2

File Name	File Size	Account Name	Direction	Date Time ↓	Status	Protocol
aws-joint-pipeline.html	5296	RackspacePartnerPv	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP
aws-ace-opportunities.xlsx	8897	RackspaceAWSAcco	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP

Recent
Today so far
Yesterday
This week so far
Last week
This month so far
Last month
This quarter so far

Powered by Backflpt
TIQ_ORCH_v0.4.5

Transfer IQ Orchestrator Partner Management Workflows Files

Ask Galileo... M

File Transfers File Explorer

Files Select Search Accounts Search

Count: 2

File Name	File Size	Account Name	Direction	Date Time ↓	Status	Protocol
aws-joint-pipeline.html	5296	RackspacePartnerPw	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP
aws-ace-opportunities.xlsx	8897	RackspaceAWSAcco	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP

Interval

- This week so far
- Last week
- This month so far
- Last month
- This quarter so far
- Last Quarter
- This year so far
- Last year

Powered by Backflipit TIQ_ORCH_v0.4.5

This makes it easier for users to track and review file transfers over different time periods.

If the user selects any interval, the file transfers that occurred during that time peroid will be displayed.

Transfer IQ Orchestrator Partner Management Workflows Files

Ask Galileo... M

File Transfers File Explorer

Files Select Search Accounts Yesterday Search

Count: 2

File Name	File Size	Account Name	Account Type	Direction	Date Time ↓	Status	Protocol
aws-joint-pipeline.html	5296	RackspacePartnerPwAccount	Partner	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP
aws-ace-opportunities.xlsx	8897	RackspaceAWSAccount	AWS	outbound	15 Sep 2025 at 10:02 PM	Success	SFTP

Powered by Backflipit TIQ_ORCH_v0.4.5

File Explorer

The **File Explorer** section is designed to support secure file transfers from the company to its external partners. It specifically handles all **outbound file transfers**, meaning any files that are sent from the company to a partner.

There are two types of outbound transfers:

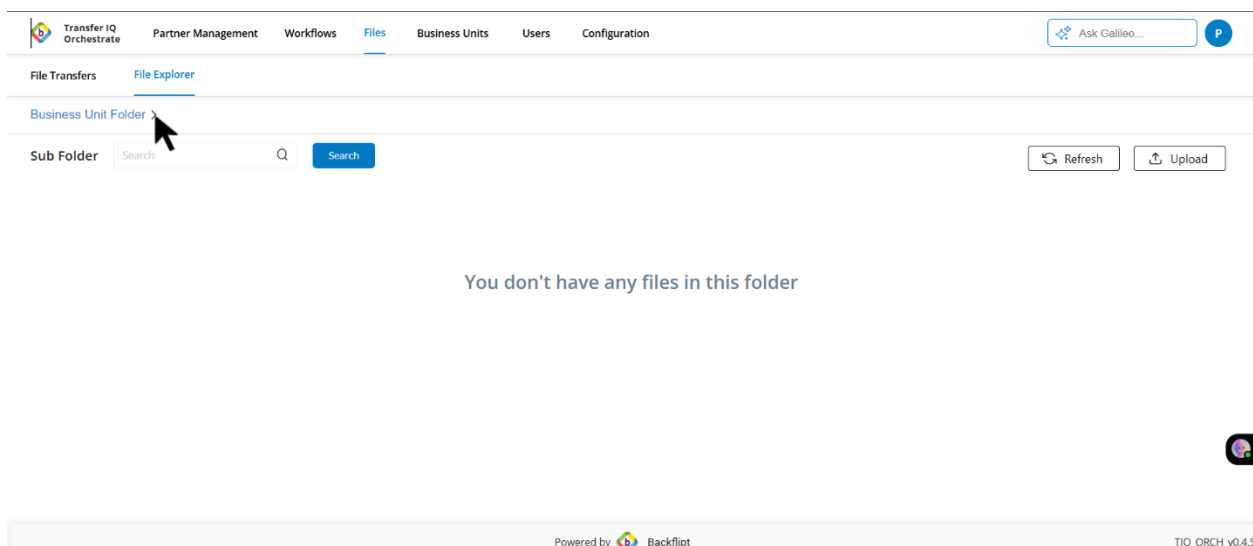
1. **AWS Outbound File Transfers**
2. **PFTS Outbound File Transfers**

Usually, to send these files, the company logs in to the **AWS Console** and uploads the files in the source. But with the **File Explorer**, the company can do all outbound transfers directly through the orchestrate application. This makes the process easier and avoids the need to use the AWS Console.

Admins have access to all Business Unit folders, which are stored under one main folder. This setup keeps file transfers secure, organized, and easy to manage.

To View the file explorer sections

1. Navigate to Files > File Explorer



Each **Business Unit** is set up in the application and linked to specific users. When a business user logs in, Business user can only see and use the folder for their own Business Unit.

Folder Creations in the File Explorer Section

In the File Explorer section, an **admin** will have access to a main **Business Unit folder**, which contains subfolders for **each Business Unit**.

A **business user** will only see the folder assigned to the specific **Business Unit** linked to that user account.

- a. Whenever a **partner** is created a folder within the assigned business unit folder will be automatically created.

Admin View

The screenshot displays the 'File Explorer' section of the 'Transfer IQ Orchestrator' application. The top navigation bar includes links for 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. The 'Files' tab is currently active. Below the navigation bar, the breadcrumb path 'Business Unit Folder > sales' is shown. A 'Sub Folder' search bar with a 'Search' button is present. To the right of the search bar are 'Refresh' and 'Upload' buttons. A table lists the contents of the 'sales' folder, with columns for 'Name', 'Type', 'Last Modified', 'Size', and 'Actions'. The table contains one entry: a folder named 'rackspace'. A mouse cursor is pointing at the 'rackspace' folder name. The footer of the interface indicates it is 'Powered by Backflip' and shows the version 'TIQ_ORCH_v0.4.5'.

Name	Type	Last Modified	Size	Actions
rackspace	Folder	—	—	

Business User View

Transfer IQ
Orchestrate

Partner Management

Workflows

Files

Ask Galileo...


M


File Transfers

File Explorer

sales >

Sub Folder

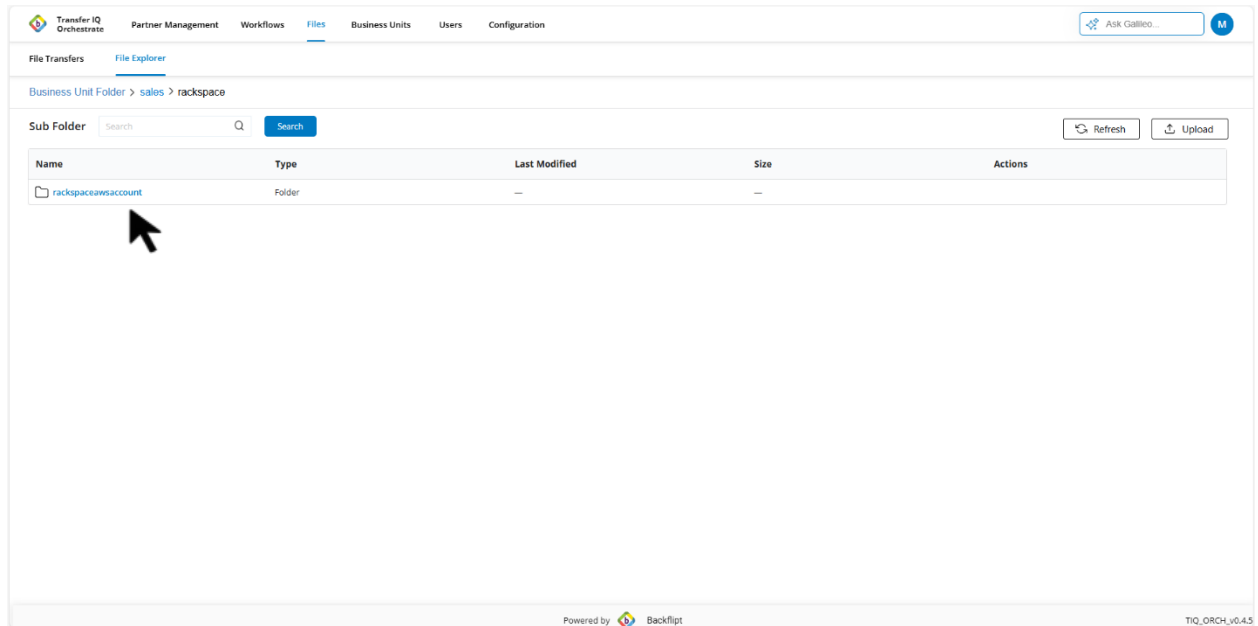
Name	Type	Last Modified	Size	Actions
 rackspace	Folder	—	—	

Powered by  Backflippt

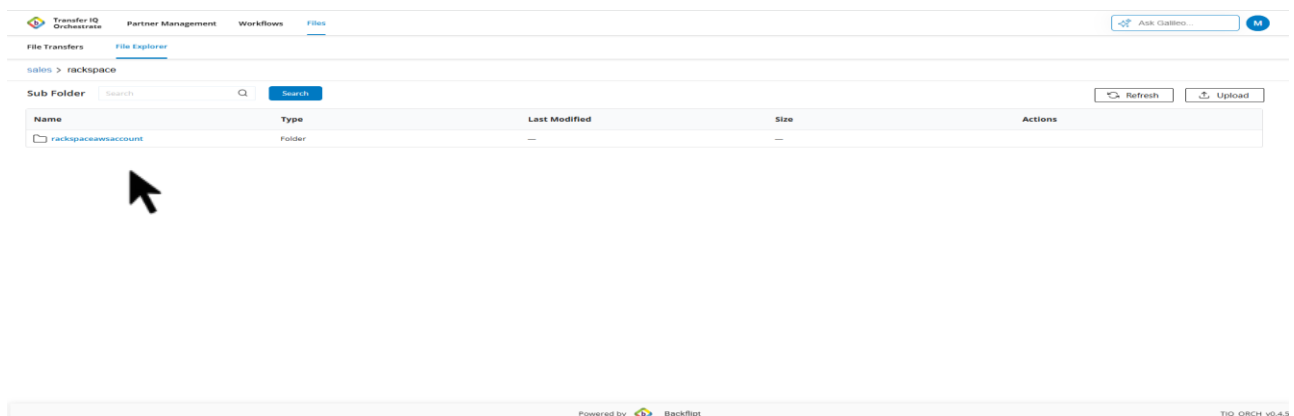
TIQ_ORCH_v0.4.5

- b. Whenever a **partner account** is created (either of type **AWS** or **PFTS**) a subfolder with the **partner account name** will be automatically created inside the relevant Business Unit folder.

Admin View



Business User View



- c. The partner account folder will include the following three subfolders:
- **Inbound** – contains of all the files received from the partner
 - **Outbound** – source folder for the company to upload and send files to the partner
 - **History** – to keep a track of all the files that have been transferred

These folders will be visible in two places:

- Under the assigned Business Unit folder in the **business user's** File Explorer view
- Under the same Business Unit folder in the **admin's** File Explorer view

Admin View:

The screenshot shows the Admin View of the File Explorer. The top navigation bar includes 'Transfer IQ Orchestrate', 'Partner Management', 'Workflows', 'Files' (active), 'Business Units', 'Users', and 'Configuration'. A search bar with 'Ask Galileo...' and a user icon 'M' is on the right. Below the navigation bar, the breadcrumb path is 'Business Unit Folder > sales > rackspace > rackspaceawsaccount'. The main area has a 'Sub Folder' search bar and a 'Search' button. To the right are 'Refresh' and 'Upload' buttons. A table lists folders:

Name	Type	Last Modified	Size	Actions
history	Folder	—	—	
inbound	Folder	—	—	
outbound	Folder	—	—	

The footer shows 'Powered by Backflipit' and 'TIQ_ORCH_v0.4.5'.

Business User View:

The screenshot shows the Business User View of the File Explorer. The top navigation bar is identical to the Admin View. The breadcrumb path is 'sales > rackspace > rackspaceawsaccount'. The main area has a 'Sub Folder' search bar and a 'Search' button. To the right are 'Refresh' and 'Upload' buttons. A table lists folders:

Name	Type	Last Modified	Size	Actions
history	Folder	—	—	
inbound	Folder	—	—	
outbound	Folder	—	—	

The footer shows 'Powered by Backflipit' and 'TIQ_ORCH_v0.4.5'.

- d. Once workflow is created for the account following folders will be created according to the configured workflow for the account. These folders will be visible in two places:
- Under the assigned Business Unit folder in the **business user's** File Explorer view
 - Under the same Business Unit folder in the **admin's** File Explorer view

Business User View:

Transfer IQ Orchestrate

Partner Management

Workflows

Files

Ask Galileo...

M

File Transfers

File Explorer

sales > rackspace > rackspaceawsaccount

Sub Folder

Search

Search

Refresh

Upload

Name	Type	Last Modified	Size	Actions
compressed	Folder	—	—	
encoded	Folder	—	—	
encrypted	Folder	—	—	
history	Folder	—	—	
inbound	Folder	—	—	
moved	Folder	—	—	
outbound	Folder	—	—	

Powered by

Backflit

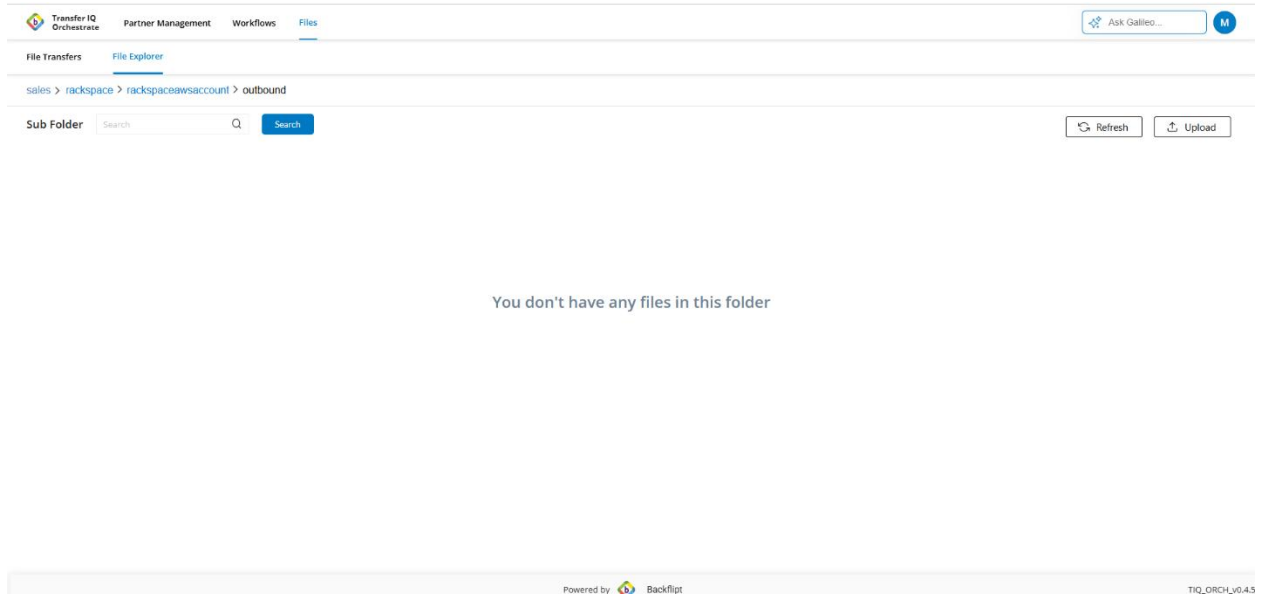
TIQ_ORCH_v0.4.5

This setup ensures that files are organized by Business Unit and partner, and access to files is controlled based on the user role.

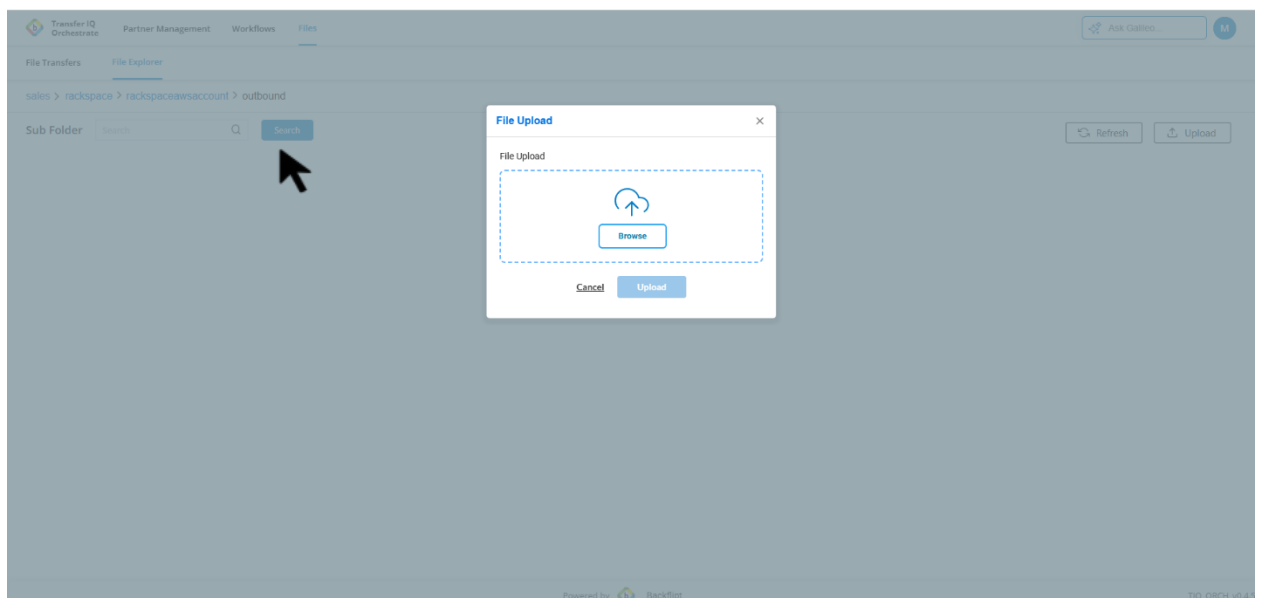
File Transfers Using the File Explorer Tab

To initiate a file transfer using the **File Explorer** tab, follow the steps below:

- 1. Navigate to the Source Folder Path**
 - a. Open the File Explorer tab.

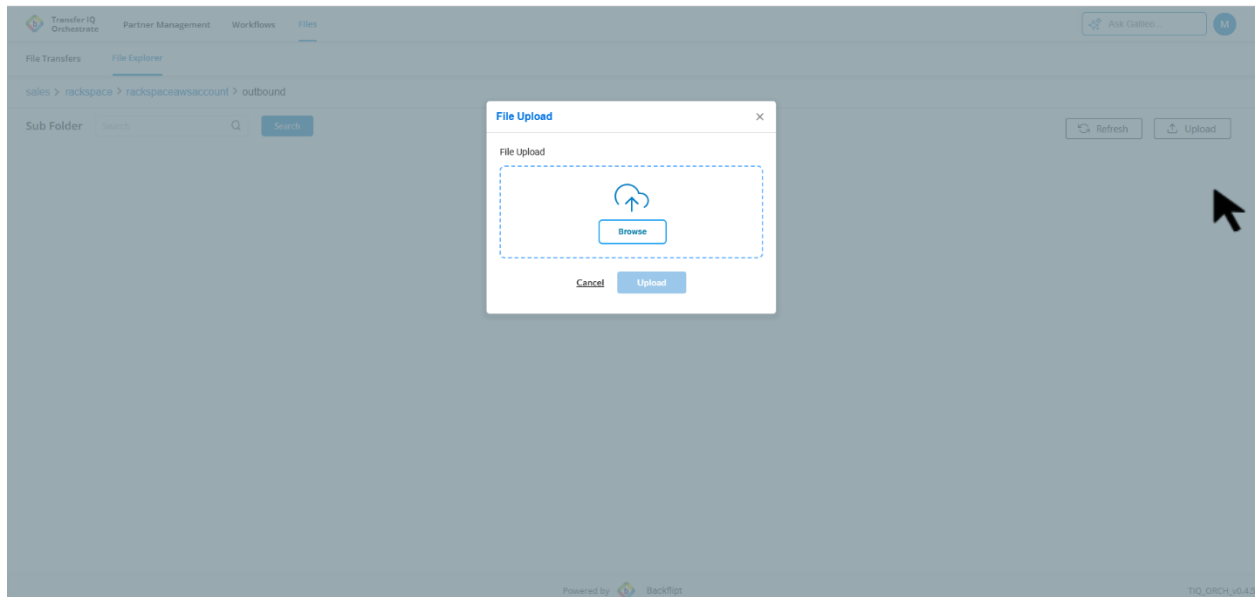


- b. Navigate to the folder where the file transfer should begin. This is usually the **outbound** folder under a specific **partner account folder** within the assigned **Business Unit**.



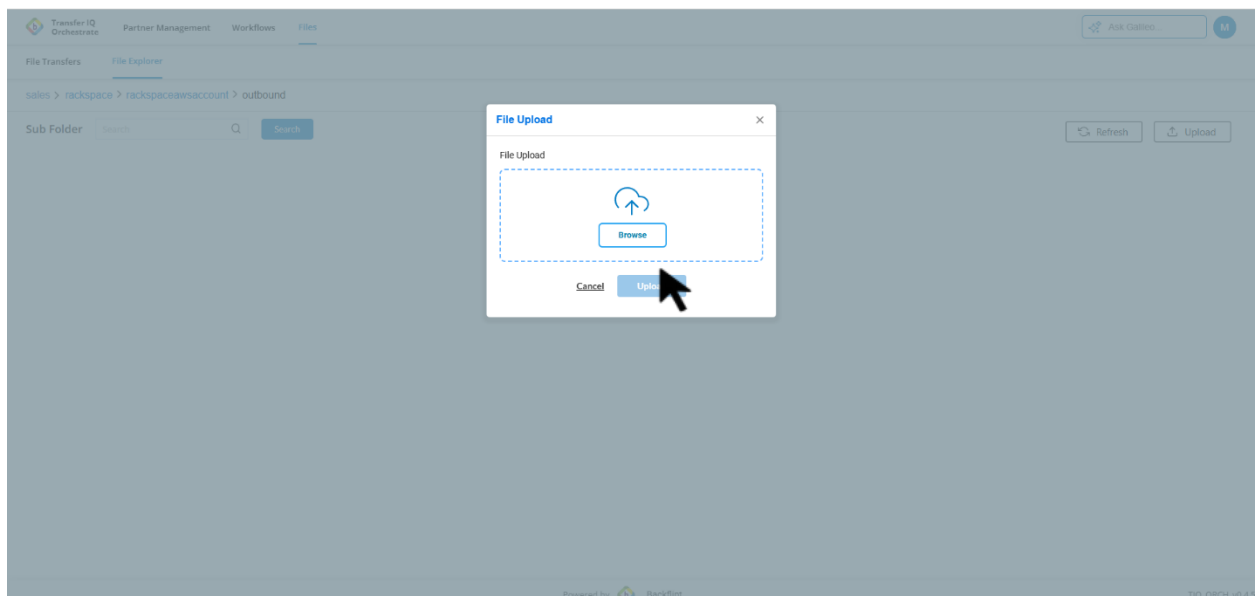
2. Click the Upload Button

- a. Inside the selected folder, click the **Upload** button to begin the process.



3. Select a File to Upload

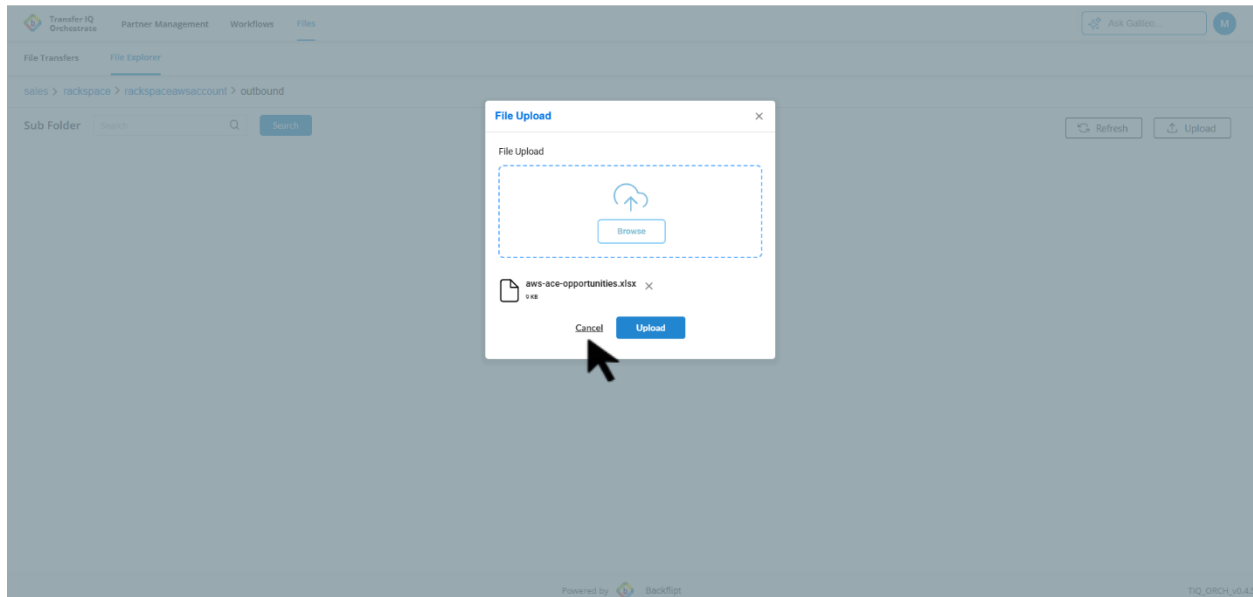
- a. A popup window will appear with a **Browse** button.



- b. Click the **Browse** button to open the file selection dialog from the local system.

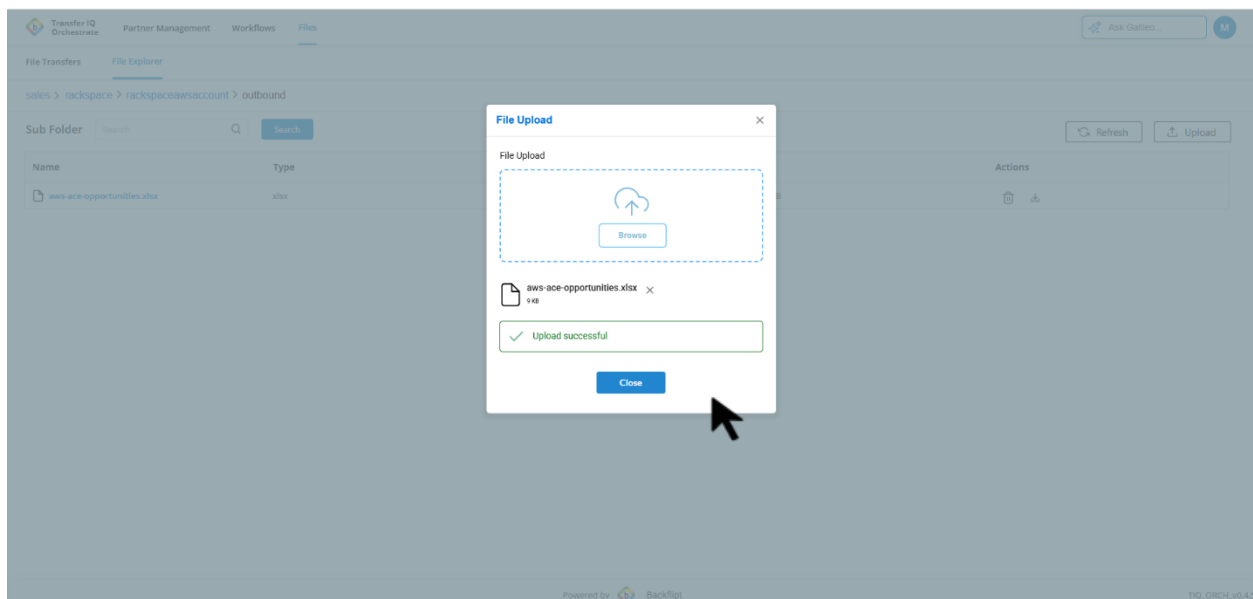
4. Preview the Selected File

- a. After selecting a file, the file name will appear **below the browse card** in the popup.
- b. This shows that the file is ready for upload.



5. Start the File Transfer

- Click the **Upload** button within the popup to begin transferring the file to the selected folder path.



- Once the file is uploaded, if there is **only one workflow** created for the partner account, that workflow will be triggered automatically. If **multiple workflows** exist, the application will identify and trigger the **best-matching workflow** based on the uploaded file.

Transfer IQ Orchestrator Partner Management Workflows Files

File Transfers File Explorer

sales > rackspace > rackspaceawsaccount > outbound

Sub Folder Search Search Refresh Upload

Name	Type	Last Modified	Size	Actions
aws-ace-opportunities.xlsx	xlsx	15 Sep 2025 at 09:34 PM	8.7 MB	🗑️ ⬇️

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After a file is successfully uploaded using the File Explorer tab, the following actions can be performed:

6. Download the Uploaded File

- Locate the uploaded file in the folder view.
- Click the **Download** button next to the file name.
- The file will be downloaded to the local system.

Transfer IQ Orchestrator Partner Management Workflows Files

File Transfers File Explorer

sales > rackspace > rackspaceawsaccount > outbound

Sub Folder Search Search Refresh Upload

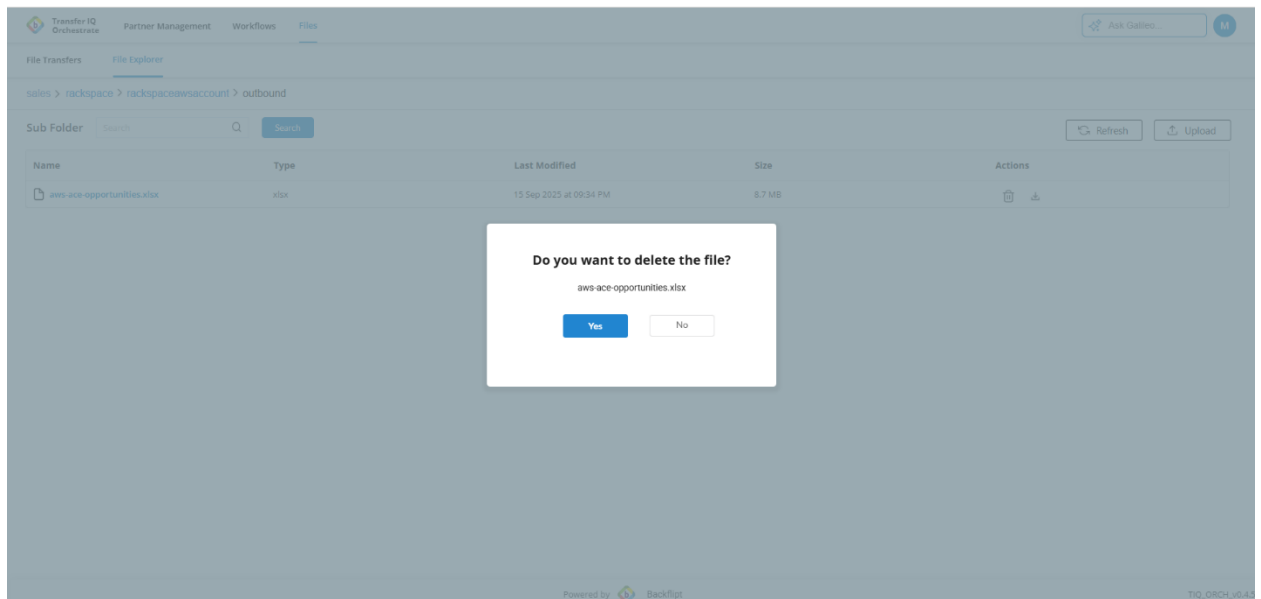
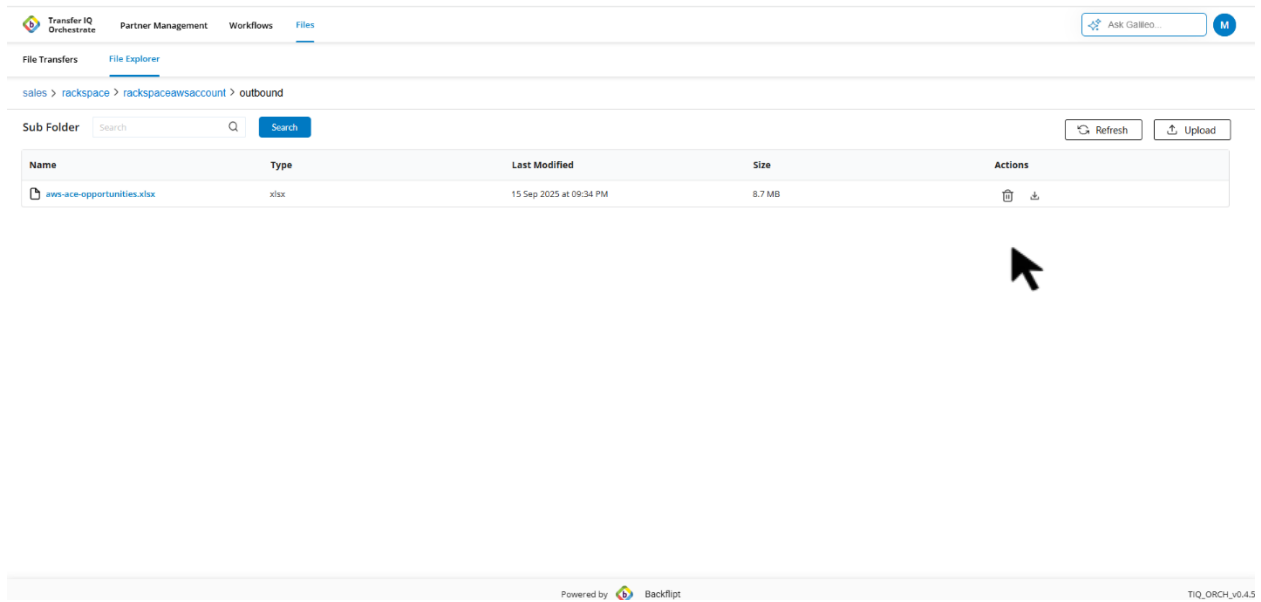
Name	Type	Last Modified	Size	Actions
aws-ace-opportunities.xlsx	xlsx	15 Sep 2025 at 09:34 PM	8.7 MB	🗑️ ⬇️

Powered by Backflip TIQ_ORCH_v0.4.5

7. Delete the Uploaded File

- To remove an uploaded file, click the **Delete** button next to the file name.
- A **confirmation popup** will appear with "Yes" and "No" options.

- f. Click **"Yes"** to confirm and delete the file.
- g. Clicking **"No"** will cancel the deletion and keep the file intact.



- 8. View details of the uploaded file
 - a. To view the details of the uploaded file, click on the file and sidebar will open which contains details associated to the uploaded file

Transfer IQ
Orchestrate

Partner Management

Workflows

Files

File Transfers

File Explorer

sales > rackspace > rackspaceawsaccount > outbound

Sub Folder

Name	Type	Last Modified
aws-ace-opportunities.xlsx	xlsx	15 Sep 2025 at 10:02 PM

View Details

File Details

File Name

aws-ace-opportunities.xlsx

Last Modified

15 Sep 2025 at 10:02 PM

Size

8.7 MB

Type

xlsx

Folder Path

Business Unit Folder/sales/rackspace/rackspaceawsaccount/outbound/aws-ace-op...

Tag (0)

No Tags available

Metadata (0)

No MetaData available

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So, in the above way, business user/ Admin can upload files in file explorer for only outbound EFS/PFTS workflows from the system itself instead of logging into AWS to upload the files.