Food and Drug Administration

FDA Electronic Submissions Gateway

WebTrader Tutorial

Document Version Date: 5/18/2018

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1.0 Overview

The new [1] WebTrader application will provide an improved user experience over the existing WebTrader application by:

- Improving the look and feel of the graphical user interface (UI) through the use of latest technologies
- Eliminating the need for JRE/JCE installation. Instead of JRE/JCE users will need to install a one-time install package which is downloadable from the WebTrader UI
- Expanding the supported browsers to Mozilla Firefox, and Google Chrome
- Improving performance by allowing for concurrent file uploads
- Replacing "The My FDA Submissions" page with the "Sent Items" page for easy viewing of recent submissions along with their corresponding receipts and acknowledgements
- Replacing the "Other Documents" folder with the Inbox for easy viewing of recent submissions, receipts and acknowledgements

1.1 Purpose

The purpose of this document is to provide steps for installing and using the new WebTrader application

1.2 Responsibilities

The following parties have responsibilities for the New WebTrader application:

- FDA: maintain and update documentation, assist in testing, and assist testers with questions, comments, and concerns
- Industry: utilize the new WebTrader application and submit any issues and comments
- Axway (software vendor): resolve application issues

1.3 System Requirements

In order to make submissions using the WebTrader, users must have the following:

- Windows 7 (or above) Operating System
- Supported Web Browsers: Internet Explorer 11, Mozilla Firefox, and Google Chrome
- Hard disk: space of at least three times the size of the submission
- A high-speed internet connection
- Note: ESG Support successfully tested the new WebTrader with the following
    - Windows 7, 8 and 10
    - Internet Explorer 11 v11.0.9600.18697
    - Mozilla Firefox v53.0.2
    - Google Chrome v59.0.3071.115

[1] ESG introduced a new WebTrader application in Production on September 17, 2017

2.0 Download & Install the WebTrader Client

2.1 WebTrader Licensing

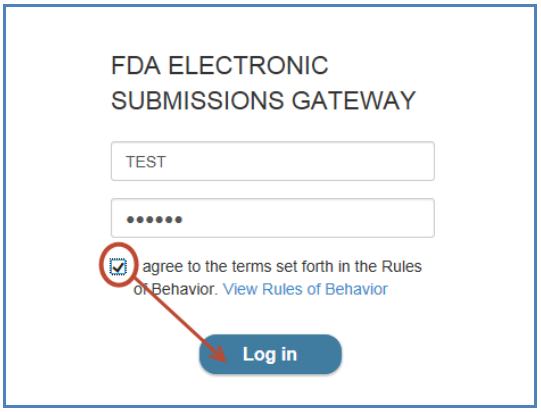
WebTrader client software free software for all FDA ESG users. Any company intending to send submissions via FDA ESG can download and install WebTrader client in their company network.

2.1 WebTrader Instaltion

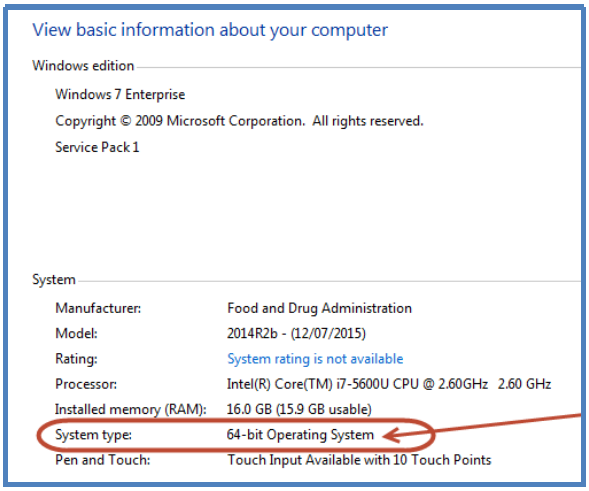
In order to install the new FDA ESG WebTrader client on your machine please go to perform the following steps:

Note: If you have already installed a previous version of the WebTrader client, see the next section for upgrade instructions.

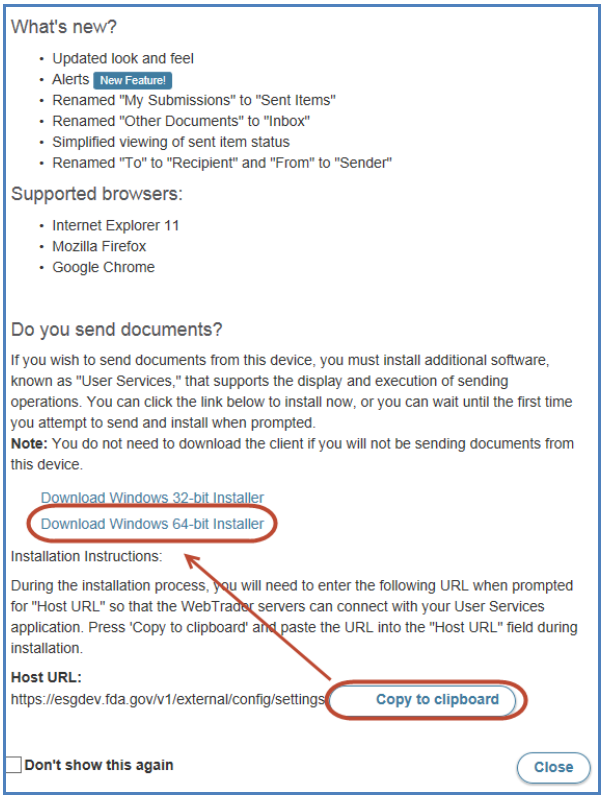
1. Go to https://esgtest.fda.gov/
2. Insert your current WebTrader Pre-Production User ID and Password. If you do not know your current WebTrader Pre-Production User ID , please send an email to ESGHelpDesk@fda.hhs.gov.
3. Click the check box next to "I agree to the terms set forth in the Rules of Behavior. View Rules of Behavior" and click the "Log in" button



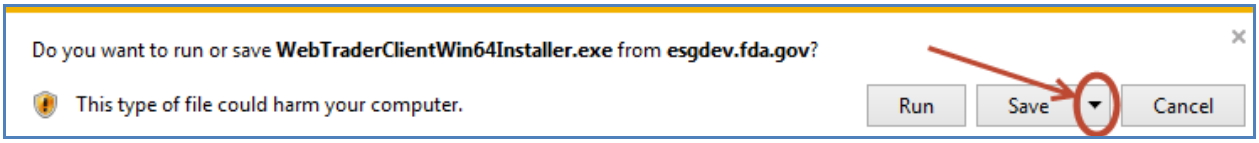
4. Determine if your Windows operating system is 32-bit or 64-bit
    a. Click on the Start Menu
    b. Single right click on "Computer"
    c. Click on "Properties
    d. Look for "System type"



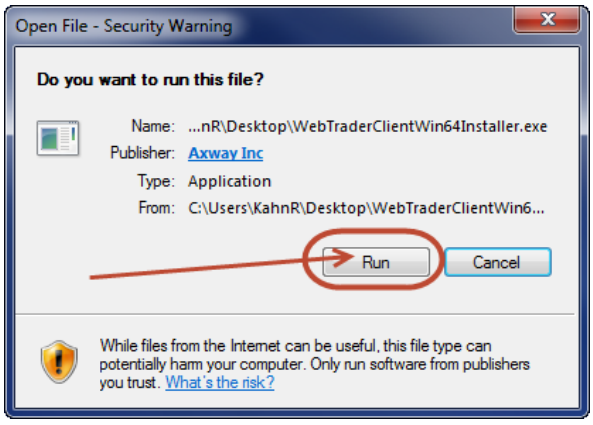
5. After determining your Windows operating system type, click the "Copy to clipboard" button and download the required Installer by clicking on the correct link:



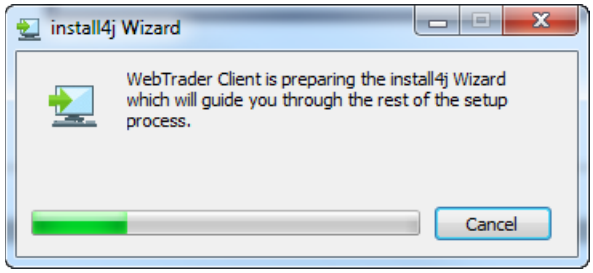
6. Click the down arrow to the right of the "Save" button and select "Save As". Save to your computer's Desktop or a location that is easily accessible:



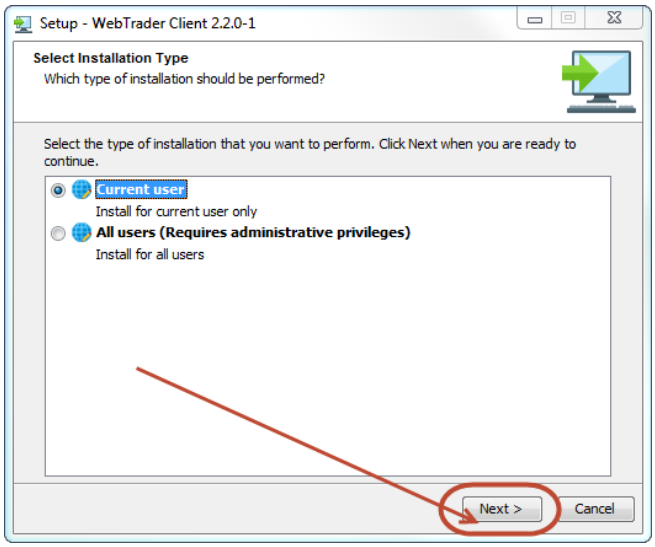
7. Double click on WebTraderClientWin<#>Installer.exe downloaded in the previous step.
8. Click the “Run” button



9. The application will begin the installation process:

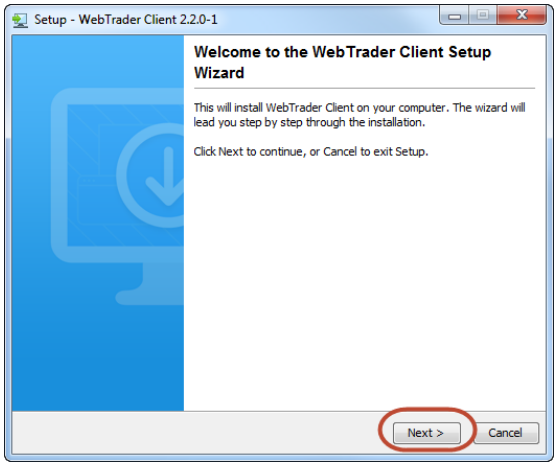


10. Select the type of installation you want to perform and click the “Next >” button:

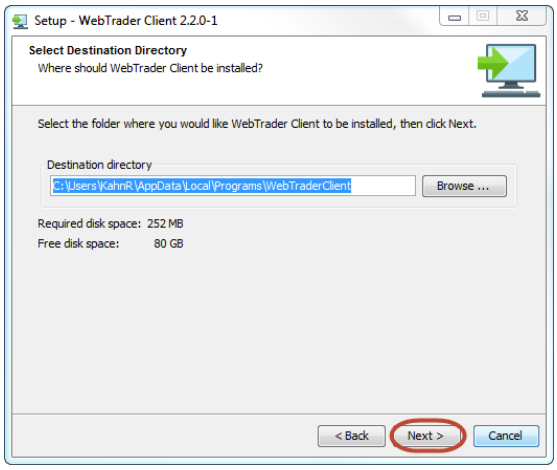


Note: If you wish to install for all users, you must have administrative rights to your machine. The installation process remains the same, however, there is some additional functionality listed in the “Multi-User Functions” section below.

11. The WebTrader Client Setup Wizard will appear, click the “Next >” button:

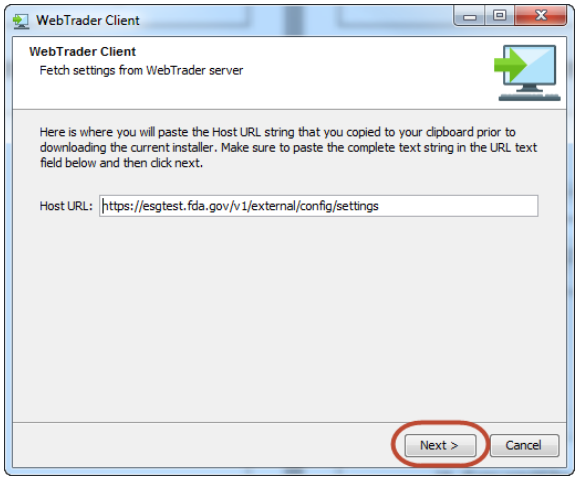


12. Select the destination where the Client is to be installed and click the "Next >" button:

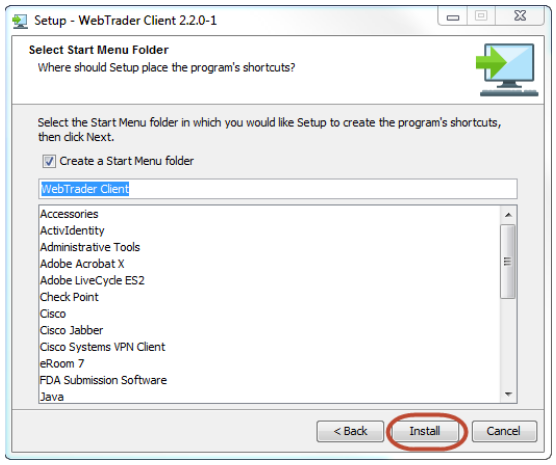


13. Paste the URL from step #5 and click the "Next >" button. If you did not copy the URL in step 5, you may use the below URL as well:
https://esgtest.fda.gov/v1/external/config/settings

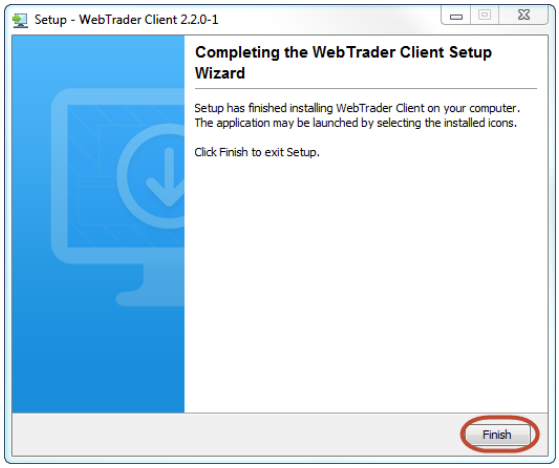
14. If you would like a desktop icon, click the checkbox and click the "Next >" button



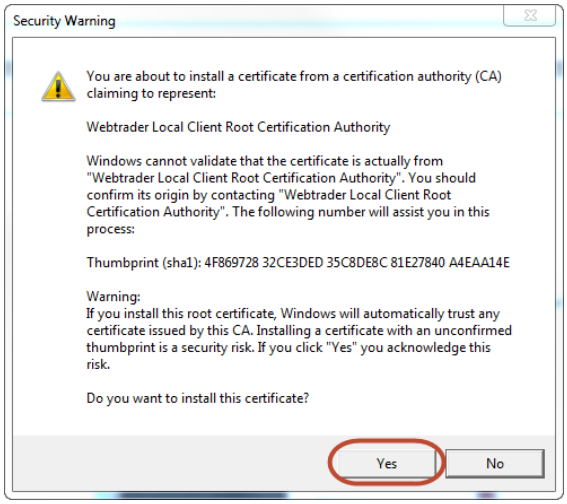
15. Select the Start Menu Folder where you'd like the Client to be installed and click the "Install" button:



16. After the client has been installed , click the "Finish" button:



17. After installation you will be prompted with the following window, please click the "Yes" button



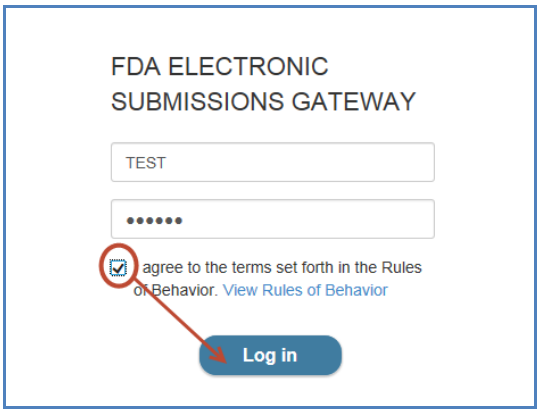
3.0 Upgrade the WebTrader Client

If you had previously downloaded and installed the WebTrader client, you may need to upgrade the client to a newer version. To upgrade the WebTrader client on your machine, please go to perform the following steps:

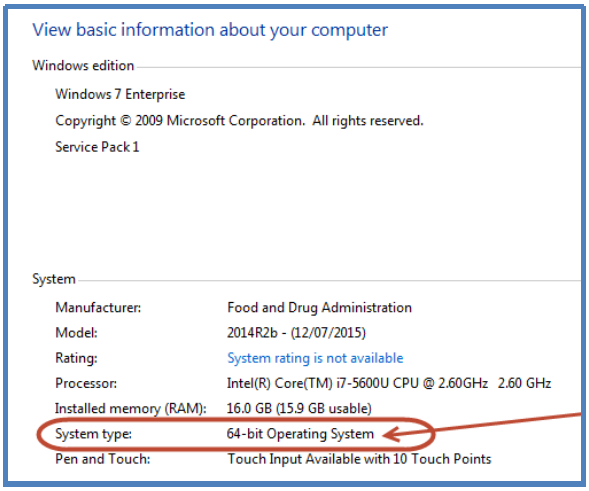
1. Go to https://esgtest.fda.gov/

2. Insert your current WebTrader Pre-Production User ID and Password. If you do not know your current WebTrader Pre-Production User ID , please send an email to ESGHelpDesk@fda.hhs.gov.

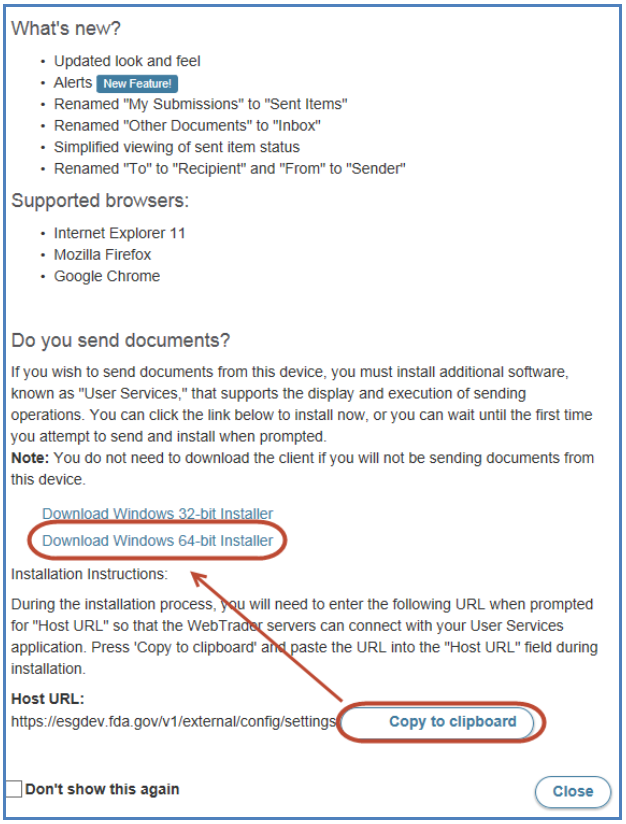
3. Click the check box next to "I agree to the terms set forth in the Rules of Behavior. View Rules of Behavior" and click the "Log in" button



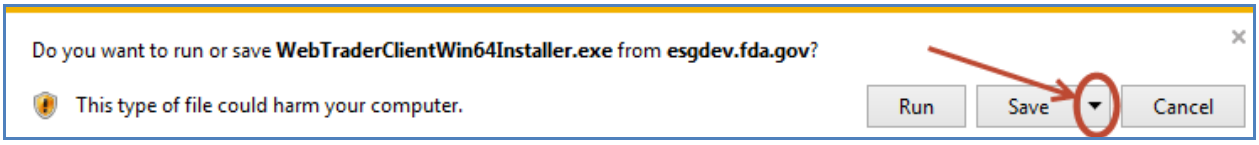
4. Determine if your Windows operating system is 32-bit or 64-bit
    e. Click on the Start Menu
    f. Single right click on "Computer"
    g. Click on "Properties
    h. Look for "System type"



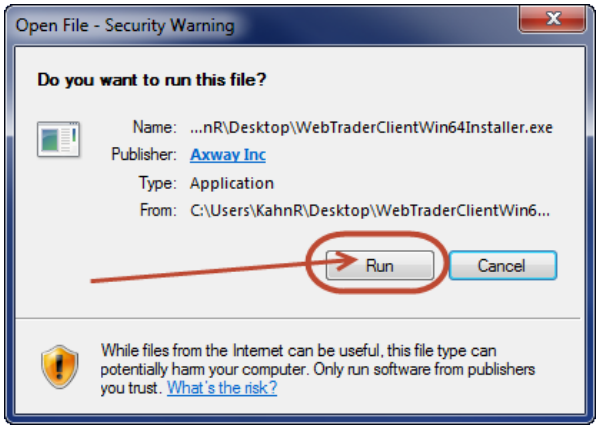
5. After determining your Windows operating system type, click the "Copy to clipboard" button and download the required Installer by clicking on the correct link:



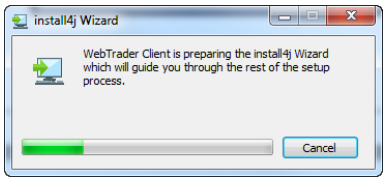
6. Click the down arrow to the right of the "Save" button and select "Save As". Save to your computer's Desktop or a location that is easily accessible:



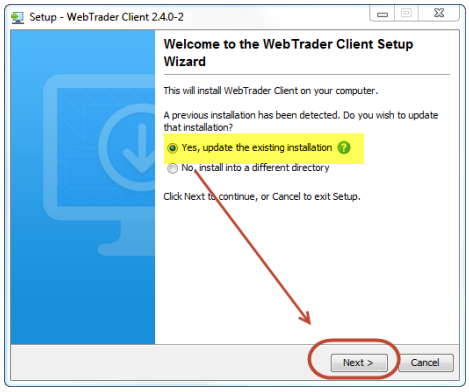
7. Double click on WebTraderClientWin<#>Installer.exe downloaded in the previous step.
8. Click the "Run" button



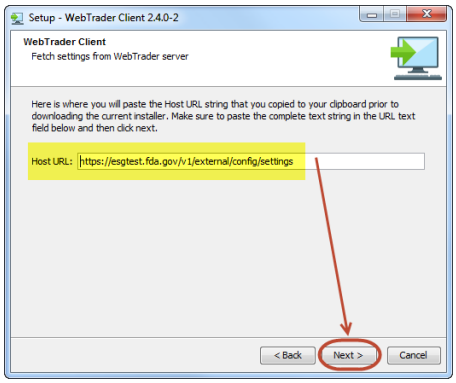
9. The application will begin the installation process:



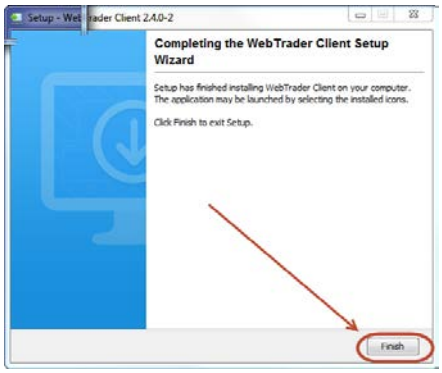
10. Make sure the "Yes, update the existing installation" radio button is selected and the click the "Next >" button:



11. Make sure the host URL is set to https://esgtest.fda.gov/v1/external/config/settings and click the "Next >" button:



12. The client will continue to upgrade on your machine. Once the upgrade process has been completed you may click the "Finish" button:



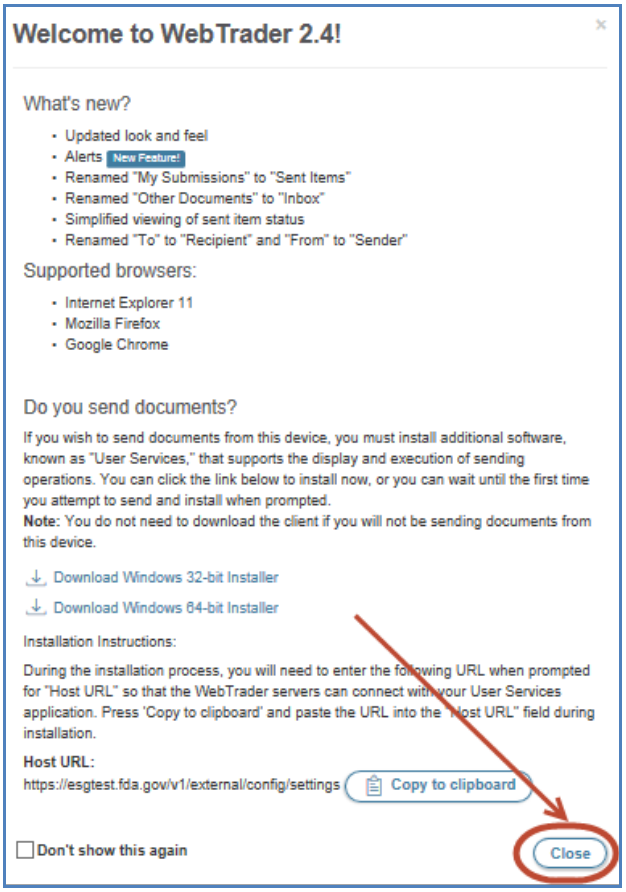
4.0 Make WebTrader Submissions

4.1 Make a Single WebTrader Submission

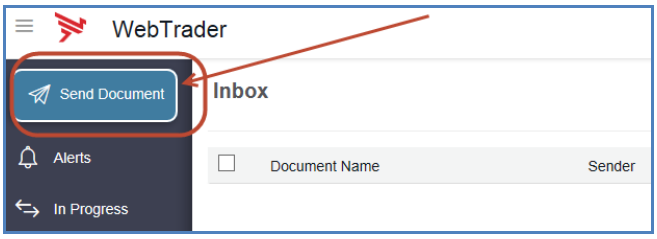
In order to make a single ESG submission via WebTrader, please perform the following steps:

1. Go to https://esgtest.fda.gov/
   a. Insert your Pre-Production User ID
   b. Insert Pre-Production Password
   c. Click the check box next to "I agree to the terms set forth in the Rules of Behavior. View Rules of Behavior" and click the "Log in" button

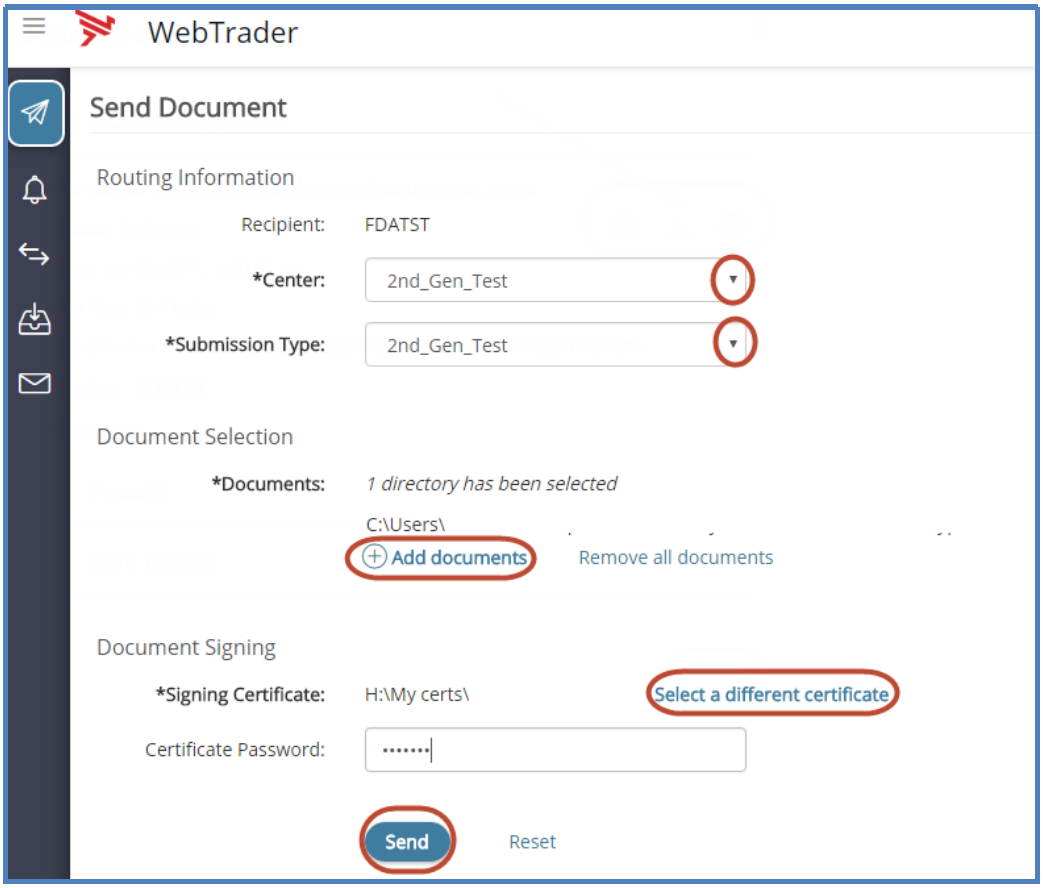
2. When you log into WebTrader you will see the Welcome Screen. Review the messages and click the "Close" button



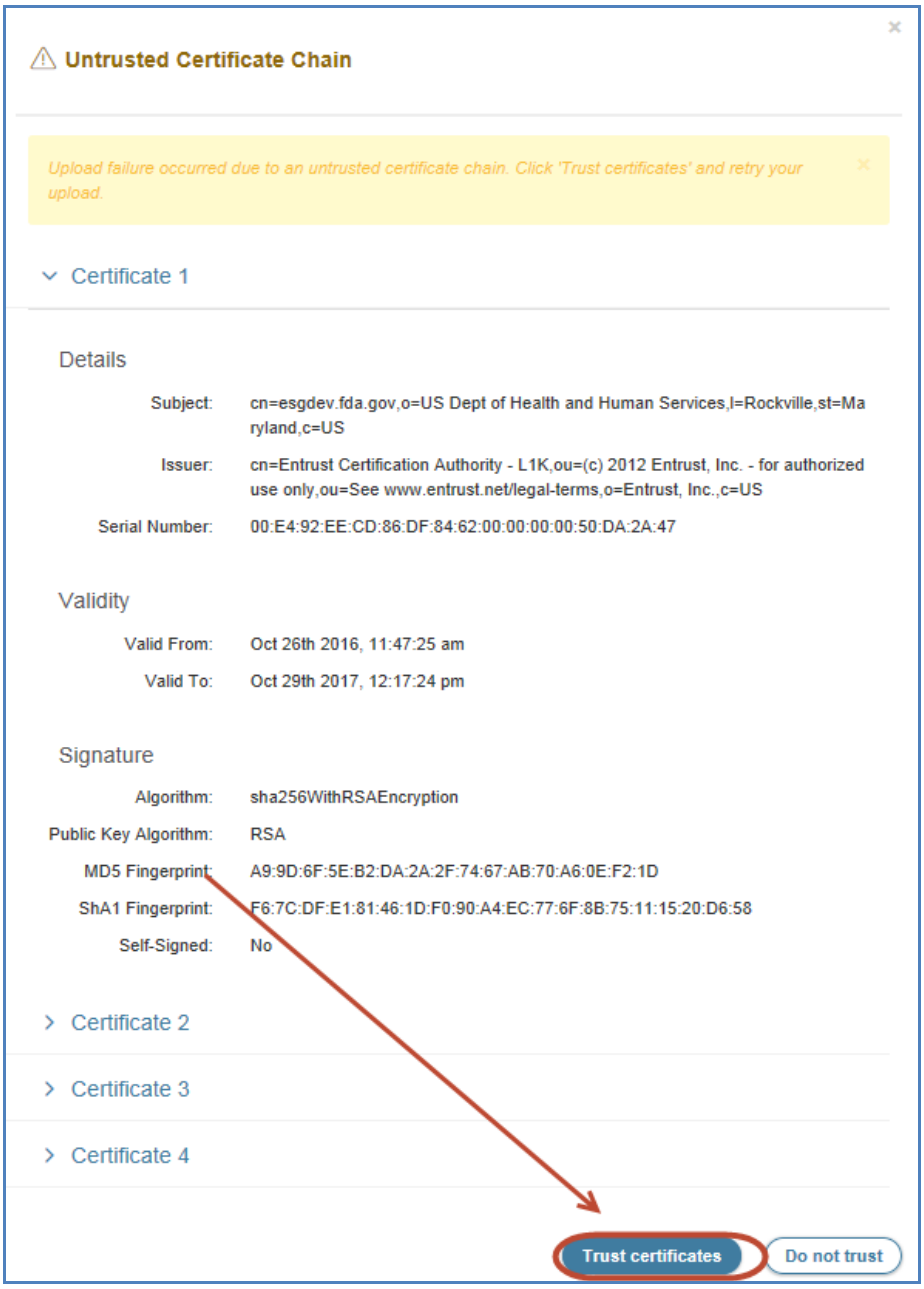
3. To make a submission, click the "Send Document" button in the left hand window frame:



4. From the Send Document page, perform the folloiwng steps:
    a. Select a Center, by clicking on the down arrow to the right of *Center
    b. Select a Submission Type, by clicking on the down arrow to the right of *Submission Type
    c. Select the file(s) or folder(s) to be uploaded by clicking on "Add documents"
    d. Select the signing certificate by clicking on the Signing Certificate link. (You can use your current Pre-Production ESG certificate)
    e. Insert the signing certificate password to the right of Certificate Password
    f. Click the "Send" button



5. When making your first submission, you may be prompted with the following window, click the trust certificates button

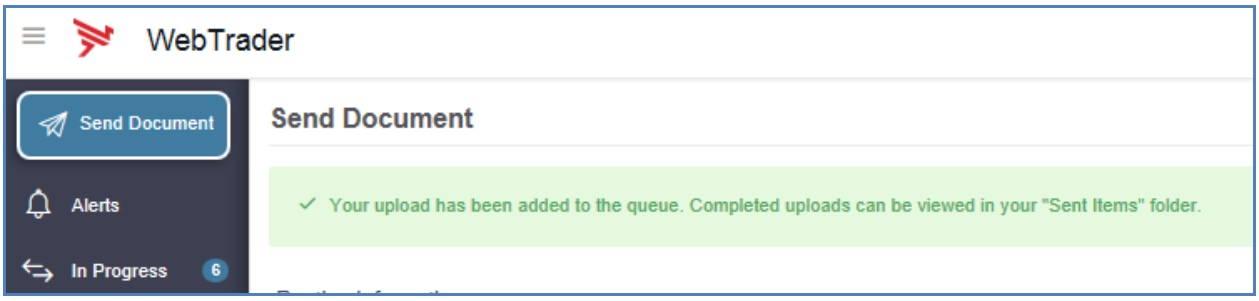


4.2 Make a Multiple WebTrader Submissions

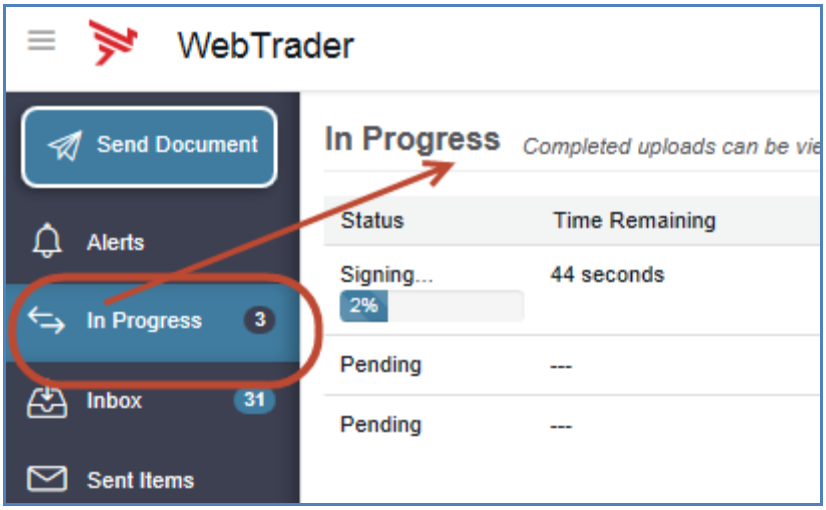
In order to make multiple concurrent ESG submissions via WebTrader, please perform the following steps:

1. Perform all steps in section 4.1
2. Perform all steps in section 4.1 as many times as needed

3. If a previous submission is still in progress you will see the following notification



4. To view all In Progress submissions, click the "In Progress" link in the left hand window frame:

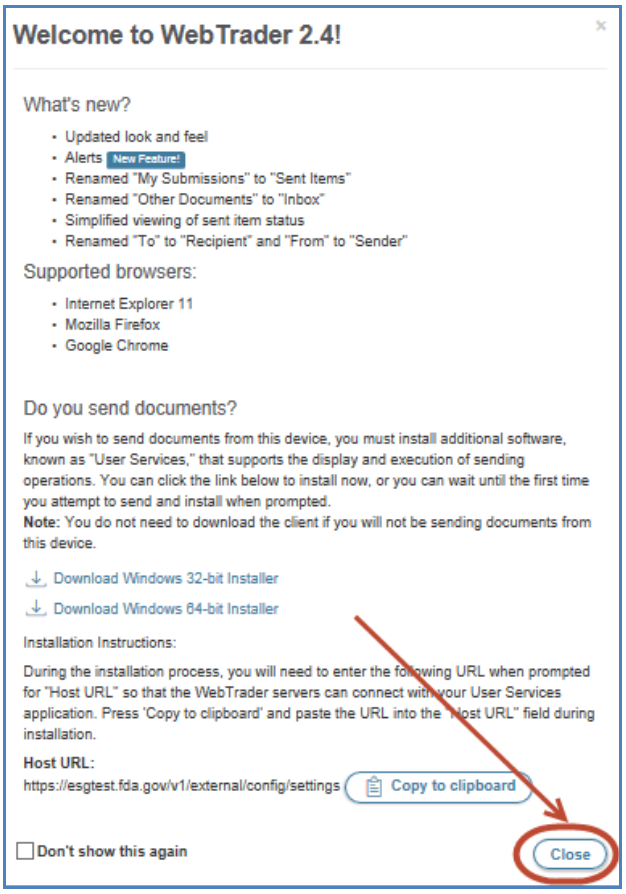


5.0 View WebTrader Submissions

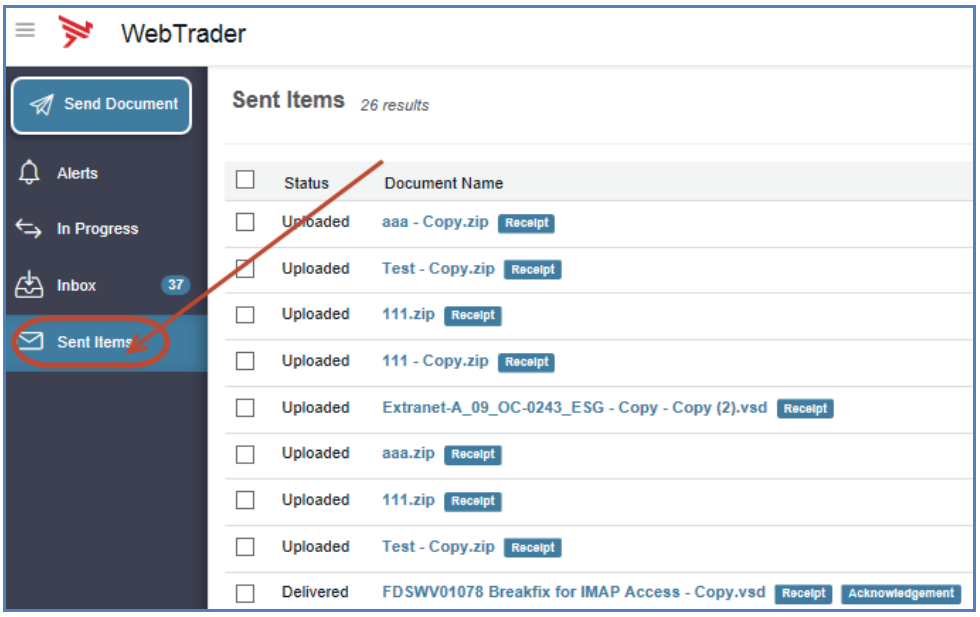
In order to view Submissions, Receipts and Acknowledgements via WebTrader, please perform the following steps:

1. Go to https://esgtest.fda.gov
    a. Insert your Pre-Production User ID
    b. Insert Pre-Production Password
    c. Click the check box next to "I agree to the terms set forth in the Rules of Behavior. View Rules of Behavior" and click the "Log in" button

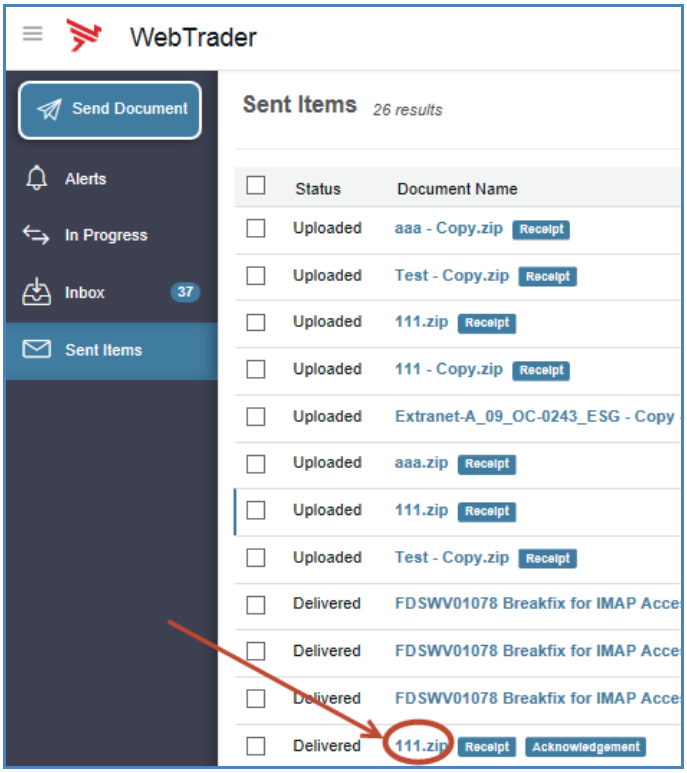
2. When you log into WebTrader you will see the Welcome Screen. Review the messages and click the "Close" button



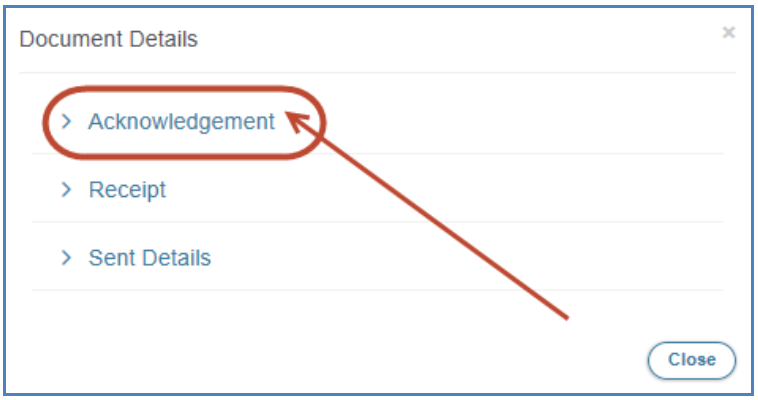
3. To view Submissions, Receipts and Acknowledgements click on “Sent Items” in the left hand window frame:



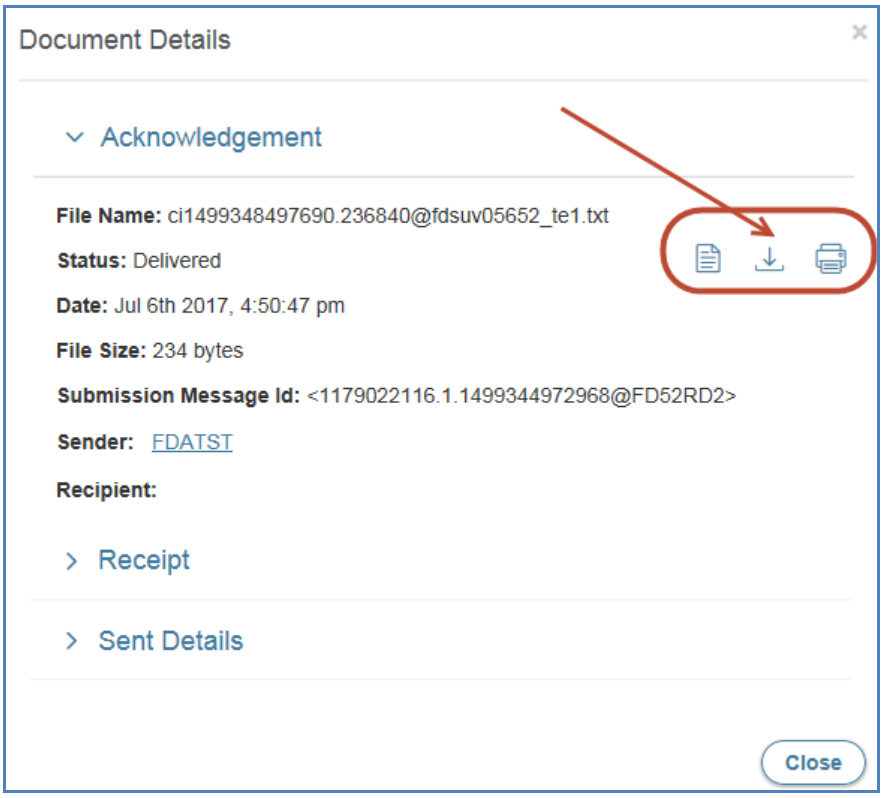
4. Under the “Document Name” column, click on the link for the submitted document. Submissions that have Receipts and Acknowledgements , will have a status of “Delivered”:



5. After clicking on the link for the Document Name, the Document Details window will appear. In order to see the Submission, Receipt, or Acknowledgement details, click on the link for Acknowledgement, Receipt, or Sent Details:



6. The Document Details will be displayed for the selected item. If the Acknowledgment or Receipt is a text (.txt) file you will be able to view, download, or print. You will need to download non-.txt Acknowledgements to your machine and use appropriate application to view. ESG recommends downloading and locally saving all Acknowledgements and Receipts:

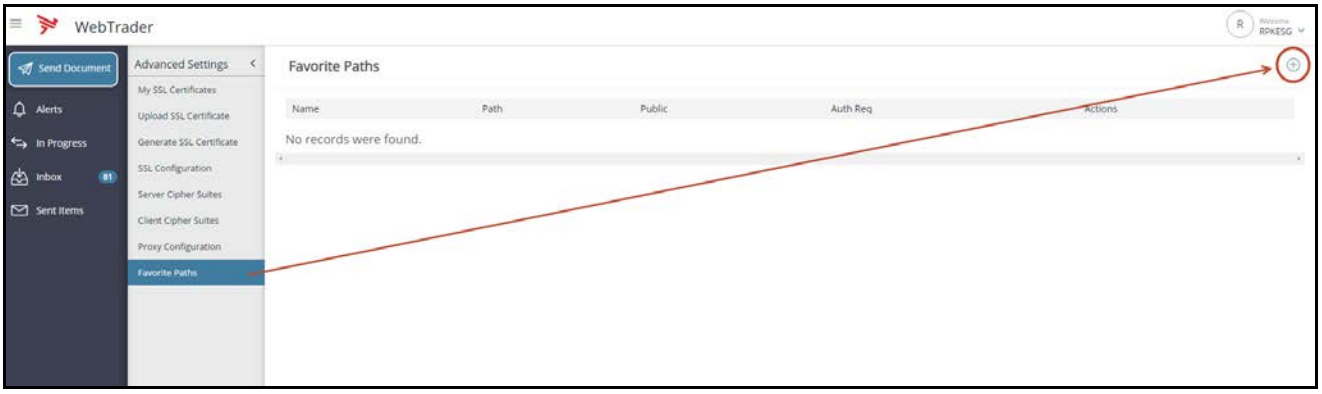


6.0 Mapping Missing Drives

When logging into the new WebTrader, some drives may not be mapped initially. In order to map missing drives:

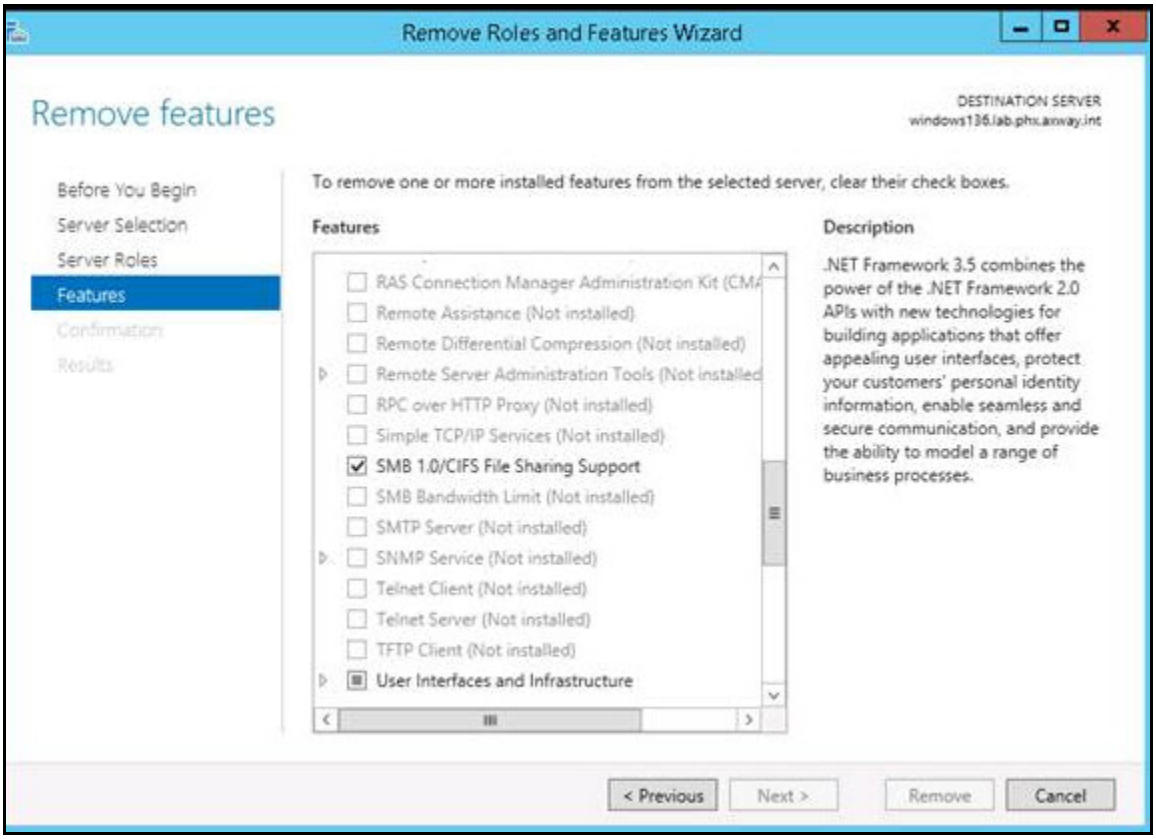
1. Click on the down arrow next to your username
2. Click on Advanced Settings in the left navigation pane
3. Click on Favorite Paths

The Favorite Path screen will appear. Click on the "+" below your Username:



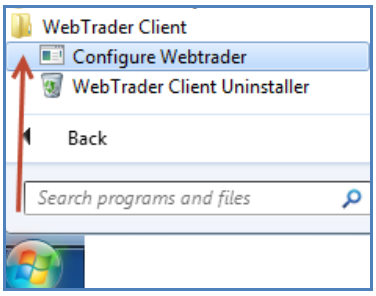
Add all pertinent data and click the "Save" button.

Note: Mapped drive access requires that the Windows file servers have "SMB 1.0 / CiFS File Sharing Support" enabled. Windows 2008 servers typically have this enabled. It is more likely that it might not be enabled on Windows 2012 servers. If "SMB 1.0 / CiFS File Sharing Support" is enabled you should see all of your drives in WebTrader:

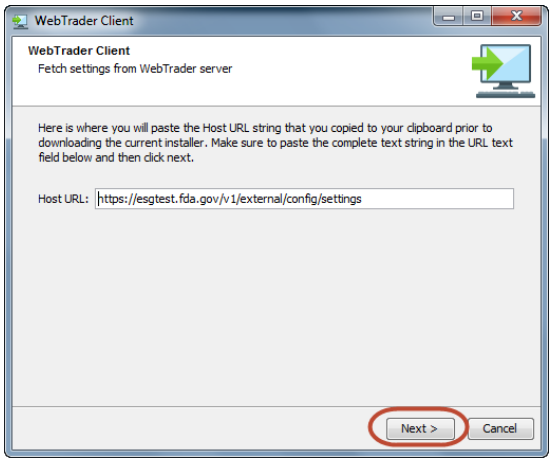

Remove Roles and Features Wizard
Remove features
DESTINATION SERVER
windows136.lab.phx.axway.int
Before You Begin
Server Selection
Server Roles
Features
Confirmation
Results
To remove one or more installed features from the selected server, clear their check boxes.
Features
RAS Connection Manager Administration Kit (CM
Remote Assistance (Not installed)
Remote Differential Compression (Not installed)
Remote Server Administration Tools (Not installed
RPC over HTTP Proxy (Not installed)
Simple TCP/IP Services (Not installed)
SMB 1.0/CIFS File Sharing Support
SMB Bandwidth Limit (Not installed)
SMTP Server (Not installed)
SNMP Service (Not installed)
Telnet Client (Not installed)
Telnet Server (Not installed)
TFTP Client (Not installed)
User Interfaces and Infrastructure
Description
.NET Framework 3.5 combines the power of the .NET Framework 2.0 APIs with new technologies for building applications that offer appealing user interfaces, protect your customers' personal identity information, enable seamless and secure communication, and provide the ability to model a range of business processes.
< Previous
Next >
Remove
Cancel

7.0 Multi-User Functions

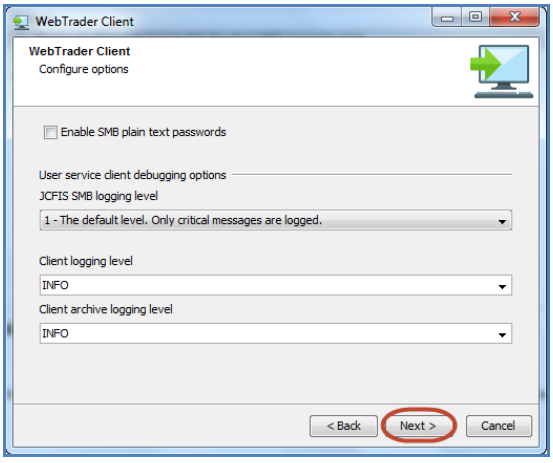
The new WebTrader has some configuration options available for the All User installation instance. In order to view the Multi-User functionality, click on Start > All Programs > WebTrader Client > Configure WebTrader:



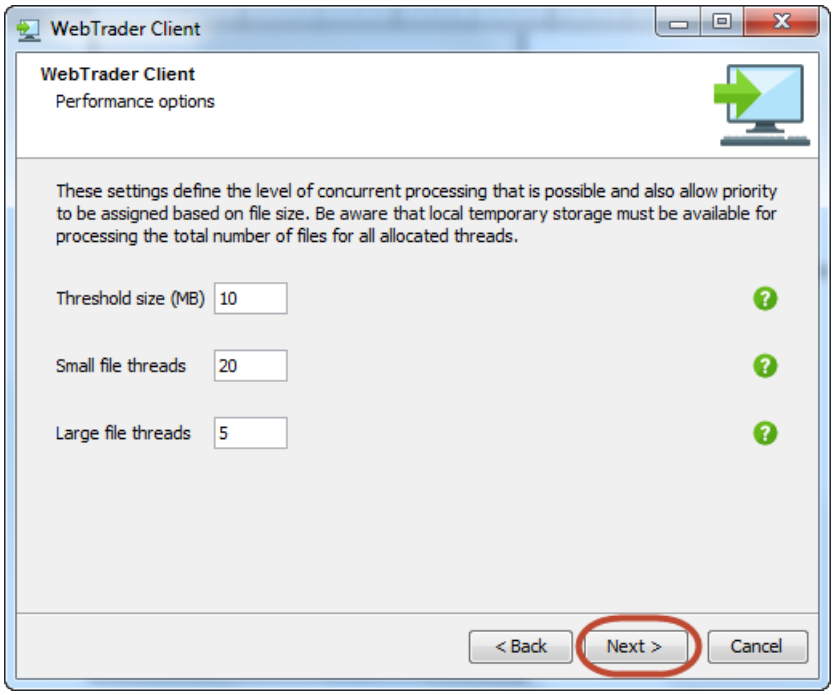
The below window will be displayed. The host URL should remain unchanged from section 2.5 above. Click the "Next >" button:



The first configuration page allows users to enable SMB plain text passwords when mapping drives, as well as, logging for trouble shooting. Click the "Next >" button to advance:



The second configuration page determines the size and number of concurrent submissions for multiple users on the same shared machine:



- **Threshold size (MB)**: Determines the size of a large file.
- **Small file threads**: All files smaller than the Threshold size (MB), will be limited by the number selected in "Small file threads". In the above image, only twenty files, 10 MB and below, will be sent through WebTrader concurrently. The rest will be queued and sent in the order of the queue.
- **Large file threads**: All files larger than the Threshold size (MB), will be limited by the number selected in "Large file threads". In the above image, only five files above 10 MB will be sent through WebTrader concurrently. The rest will be queued and sent in the order of the queue.

After determining the appropriate number for your configuration, click the "Next >" button to get to the last page and the "Finish" button to finish.