

Transferring Data Files to and from the CARLI Test Server using Secure FTP

(revised May 30, 2013)

This document is for staff at the new participating I-Share libraries that are involved in extracting and testing the data that will be loaded into I-Share's Voyager system. It describes the use of secure file transfer protocol (secure FTP, or SFTP), which you will be using during the test loads and final production loads of your data. Because some of the data that you will send need to be kept secure (such as patron data and circulation transactions), the CARLI servers are set up to allow only Secure FTP. You cannot use regular FTP to get or put data on any CARLI server.

Once your library is in production status on I-Share's Voyager, you will be receiving a similar secure FTP account on a different server, which will be used for ongoing activity. This document is your guide for this process during the test and production loads of your data, for your initial Voyager implementation.

I. Introduction

Staff must use Secure FTP (SSH Secure File Transfer Protocol) to get and put files on all of the CARLI servers. Secure FTP provides a safe way to transfer data (particularly patron and circulation data) from your present system to CARLI's Voyager environment.

CARLI is providing you with a secure FTP account on the test server that you will use in two ways:

- You will be using it to put the data from your current system onto the CARLI server, from where Ex Libris (ExL) staff will retrieve the data.
- You may be using it to get some of the reports that come from the test and production data conversion processes.

II. SSH – The Standard

There is a standard called SSH (for Secure SHell) which is a more secure version of the older telnet and FTP protocols. The current version of the SSH standard is version 2. When you use FTP to move files to and from the CARLI servers, you will need to use a Secure FTP client that conforms to SSH, Version 2 (sometimes written SSH2). Please note that a regular FTP client cannot be used for a Secure FTP (SFTP) transaction.

III. SSH – The Client

One Secure FTP client that conforms to version 2 of the standard is called SSH Secure File Transfer Client, from SSH Communications Security. You may use another Secure FTP client if you wish, but this one has the following advantages:

- The SSH Secure Shell Client product is available for download from the CARLI website at the URL below:

<http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/SSHSecureShellClient-3.2.9.exe>

- Many campuses already make it available and support it.

- The SSH Secure Shell Client product actually includes 2 clients, a secure FTP client and a secure telnet client. (There may at times be a need for your library to use secure telnet to CARLI servers, after your initial Voyager implementation.)
- It is the client that CARLI staff members know best, for troubleshooting purposes.

IV. Setting up SSH

Whichever SSH client you use, you need the following information:

- The address of the server where your Secure FTP account is located. For the test and production data loads for your Voyager implementation, the server address is: **voyager-test.carli.illinois.edu**
- The User Name with which you will log on (and the name of the Secure FTP directory) for your library is **xxxftp**, where “xxx” is CARLI's 3-letter code for your library, in lower case letters. See <http://www.carli.illinois.edu/products-services/i-share/newmem/port-info> for a list of 3-letter codes for the new I-Share libraries. This account has a **password** created for you by the CARLI Office. If you need the password for your library’s account or need to change the password, please contact the CARLI Office at support@carli.illinois.edu or call (1-866-904-5843). The login information will be provided directly to your project manager.

V. Installing the SSH Secure File Transfer Client

NOTE: the instructions and the screen shots below in sections V and VI apply to the use of the SSH Secure File Transfer Client.

Download the SSH Secure Shell Client executable file to your PC from the URL below:

<http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/SSHSecureShellClient-3.2.9.exe>

Run the SSHSecureShellClient-3.2.9.exe file to install the program.

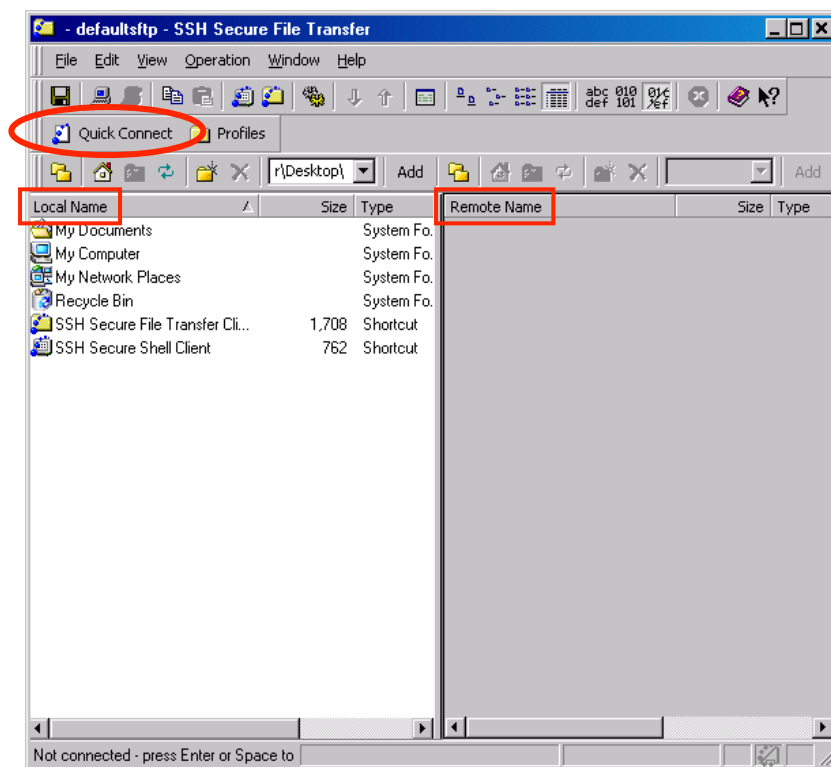
After you install the SSH Secure Shell ftp client, it is likely that you will have two SSH icons placed on your desktop. For file transfers, use the icon named “SSH Secure File Transfer Client”:



Double-click the icon to open the program.

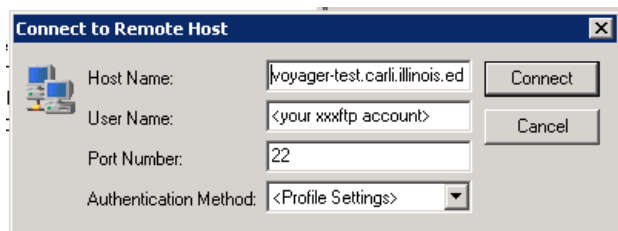
VI. Using the SSH Secure Shell Client

In the SSH Secure File Transfer program, there are two main sections. The left side, with “Local Name” at the top, is a list of files from your own computer. You can drill down to the appropriate file or directory by opening folders until the needed file or directory is displayed. The right side of the window, with “Remote Name” at the top, is where the list of files in your institution’s Secure FTP account will display. This will be gray and empty until you connect to the server.



To connect to the CARLI test server for the new libraries project:

1. Click **Quick Connect**. Enter the following information in the “Connect to Remote Host” box:
2. Enter the Host Name: **voyager-test.carli.illinois.edu**
3. Enter the User Name: **xxxftp** (where “xxx” is CARLI’s 3-letter abbreviation for your library, in lower case letters). No changes are needed in the Port Number and Authentication Method fields.
4. Click **Connect**.



5. The first time you logon from your workstation, you may see the message: "Do you want to save the new host key to the local database?" If so, respond **YES**.
6. After clicking **Connect** you will be prompted to enter the password for your library’s xxxftp account. Contact the CARLI Office if you need your account’s password.

Once connected, you may add the “Profile” for this server to the program by going to **File → Profiles → Add Profile**. It is recommended that you use a profile name such as “CARLI test server” to distinguish this profile from a future production server profile. If you create a profile, then the next time you use the SSH Secure File Transfer Client, you can choose the profile for the test server from the **Profiles** button.

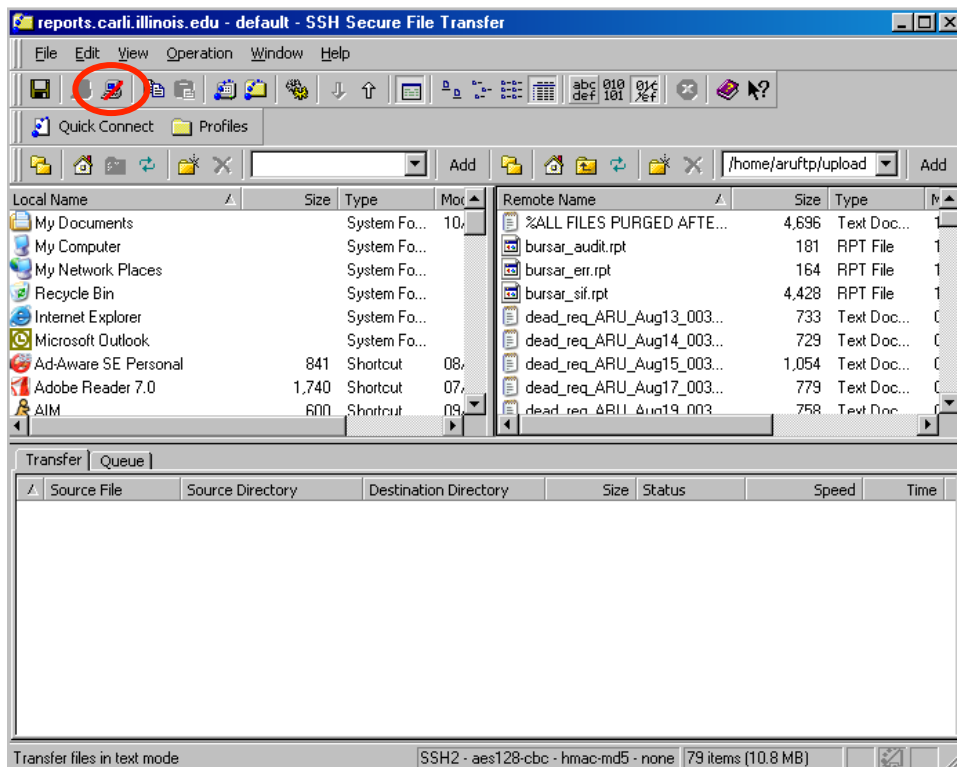
After you logon, you will see a screen similar to the one shown below (possibly with files listed on the right, and with a different server name in the window bar and your library's account information on the right).

If you wish to transfer a file from your workstation to your xxxftp account, simply drag the file from your workstation (left side of the window), and drop it on the right side of this window.

If you wish to transfer a file from your xxxftp account to your workstation, simply drag the file from the right side of the window and drop it on the left side of the window in the desired location on your workstation.

If you are familiar with the Windows environment, the SSH Secure Shell client will work pretty much as you expect. When you connect to the server with the SSH Secure Shell ftp client, a list of the files in your Secure FTP directory will be displayed. If you open another folder on your workstation, you can simply drag and drop files from your workstation to the server, or vice versa. If you highlight a file and hit the delete key, you will delete the file. The usual tricks for dealing with lists of files will work as you expect: You can use <CONTROL+ENTER> to highlight several files that will be transferred between the workstation and the server. You can use <SHIFT+ENTER> to highlight a range of files to be transferred.

To Disconnect, use the red slash icon in the toolbar, or go to **File → Disconnect**.



VII. Data File Naming Conventions

When you put the conversion data files on the voyager-test server, please use the following naming convention to identify each kind of data and your library. Please replace the XXX in each filename with your institution's three letter CARLI code. Also, when you place your production data on this server, please substitute the word "prod" for "test" in the examples below, so there is no confusion as to which file is to be used for each load cycle.

Note: not all of new I-Share libraries will be converting each type of data listed below.

XXX_bib_test

(for the bibliographic records; use XXX_bib2 etc. if you have to send multiple bib files)

XXX_mfhd_test

(for the MFHD records, if you are supplying a physically separate file of MFHD records (or serials copy records from some ILS systems); use XXX_mfhd2 etc. for multiple files, if needed)

XXX_item_test

(for the item records, if you are supplying a physically separate file of item records; use XXX_item2 etc. for multiple files, if needed)

XXX_patron_test

(for the patron records)

XXX_charge_test

(for the charge transaction records)

In addition to the naming convention above, ExL staff require that each set of files be supplemented by a brief document (a text file is fine) describing the record type of each file as well as the record count in each file. Please use the naming convention of XXX_files_test.txt (for the test load files) or XXX_files_prod.txt (for the production load files) for this descriptive document.

VIII. Data Notification

After any conversion data file has been placed on the voyager-test server, the library should post a note to the Ex Libris Group Data Analyst notifying her/him that there is data ready for retrieval.

Data Analyst Russell Thompson's email address is:

Russell.Thompson@exlibrisgroup.com

In addition, you must include a cc: to the following email address so that all other appropriate Ex Libris and CARLI staff also receive this notification:

ishare-team@exlibrisgroup.com

The Ex Libris Data Analyst will then retrieve the data from your library's xxxftp directory and contact the library if there are any problems with the data.