Transferring Data Files to and from the
CARLI <u>Test</u> Server using Secure FTP
(revised September 2017)

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 <u>only</u> 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 <u>test and production loads</u> of your data, for your initial Voyager implementation.

<u>Introduction</u>

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.

You will need a Secure File Transfer Protocol (SFTP) client in order to get and put files to CARLI servers. Some FTP clients also allow SFTP connections. Some examples of free, open-source SFTP clients available are WinSCP and FileZilla.

Whichever client you use, you will 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). This login information will be provided directly to your project manager.

<u>Installing WinSCP</u>

NOTE: the instructions and the screen shots below apply to WinSCP, a freely available program. Other secure file transfer clients are available, which you may use if your campus prefers them.

1. Download the most recent WinSCP executable file from https://winscp.net/download/WinSCP-5.9.6-Setup.exe to your PC.
2. Run the winSCP###setup.exe file (where ### is the version number) to install the program using the setup wizard. If you get a security warning, click "yes" you want to install.
3. After you install WinSCP you will see this icon on your desktop:

4. Double-click the icon to open the program.

Using WinSCP

When you start WinSCP, you will be prompted for server and login information. You can choose to save the login information as a shortcut, but best practice is NOT to save your password.
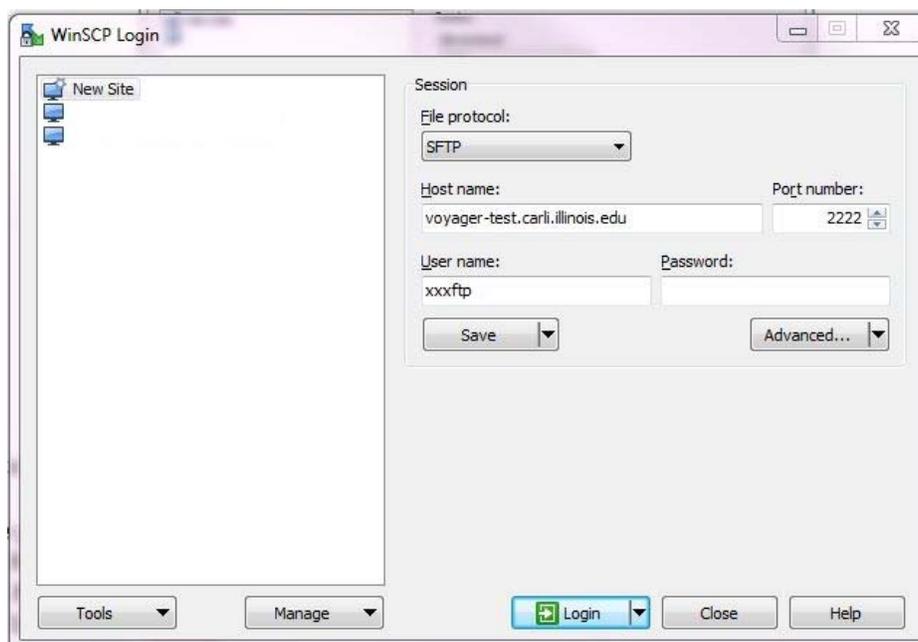
To connect to the CARLI Server:

1. Leave File protocol as SFTP
2. Enter the Host Name: **voyager-test.carli.illinois.edu**
3. Change the Port number to 2222.
4. Enter the User Name: **xxxftp** (where "xxx" is CARLI's 3-letter abbreviation for your library, in lower case letters)
5. Leave the Password: box blank.
6. Click Save.
7. The "Save session as site" window will open.
8. Set the Site name: as CARLI Test.
9. Leave the Folder: as <root>.
10. You may check the checkbox to "Create desktop shortcut", but do NOT click the Save password checkbox.
11. Click OK.
12. Highlight CARLI Test in the left side list and click the Login button.

13. The first time you login, you will likely see the prompt, "Continue connecting to an unknown server and add its host key to a cache?" or alternatively, "Do you want to save the new host key to the local database?". If so, respond **YES**.
14. You will be prompted for your password during the login process.

After you log on, you will see something like the following screen: files in the left pane are on your local PC; files in the right pane are in your xxxftp account on CARLI's Files Server.
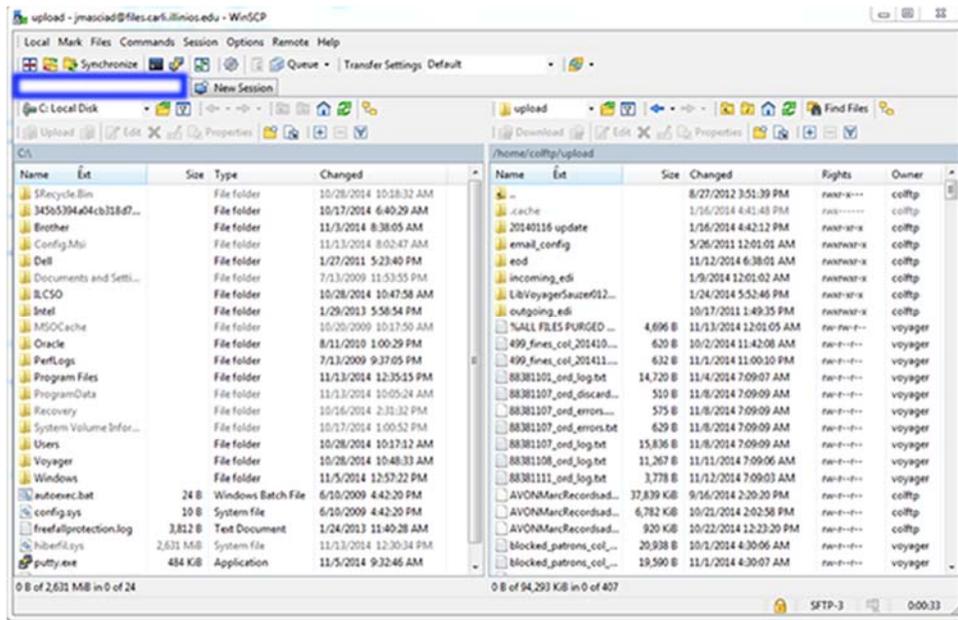
To transfer a file from your workstation to your xxxftp account, simply drag the file from the left side of the window to the right side of the window.

To transfer a file from your xxxftp account to your workstation, simply drag the file from the right side of the window to the left side of the window.

To delete a file from either place, highlight the file and press the delete key on your keyboard.

To Disconnect, go to **Session → Disconnect** (shortcut Shift+Control+D).

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.

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 David Seller's email address is:
david.sellers@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.