



User Guide

Secure File Transfer Protocol (SFTP) Access

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1.0 Purpose

This user guide explains how committee members can use the Secure File Transfer Protocol (SFTP) to access documents for the committees to which they belong. It includes these sections:

- Getting Started
- WinSCP Client
- SFTP Net Drive Free Client
- BitKinex Client
- Filezilla Client

2.0 Getting Started

This section includes these topics:

- Recommended SFTP Clients
- Managing the Documents

2.1 Recommended SFTP Clients

The following SFTP clients are recommended for use with the SFTP download link:

- WinSCP – Download Link: <http://winscp.net/eng/download.php>
- SFTP Net Drive Free – Download Link: <https://www.eldos.com/files/sftpnetdrive2/SftpNetDriveFree.exe>
- BitKinex – Download Link: <http://www.bitkinex.com/>
- Filezilla – Download Link: <https://filezilla-project.org/download.php?type=client>

2.2 Managing the Documents

The following rules apply when managing documents via the SFTP clients:

- Users cannot delete a document using SFTP.
- Users cannot upload a document that already exists in the system.

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3.0 WinSCP Client

This section explains how to access the WinSCP client. It includes these sections:

- Downloading WinSCP
- Logging in to WinSCP
- Managing the Documents
- WinSCP Specific Behavior

3.1 Downloading WinSCP

Use the following link to download the WinSCP client:

<http://winscp.net/eng/download.php>

3.2 Logging in to WinSCP

Follow these steps to log in to the WinSCP client:

1. Enter the following access information in the WinSCP Login dialog box:
 - Host: portal.serc1.org
 - Username: <same as Compliance Portal username>
 - Password: <same as Compliance Portal password>
2. Click the **Login** button.

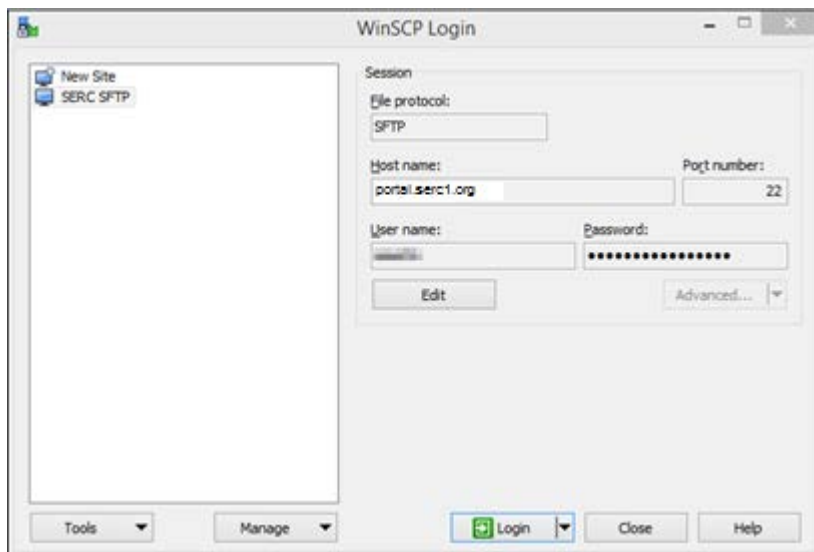


Figure 1: WinSCP Login Dialog Box

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3.3 Managing the Documents

The highlighted section on the right side of the window displays a list of all the folders and documents from the committee(s) to which the logged-in user belongs:

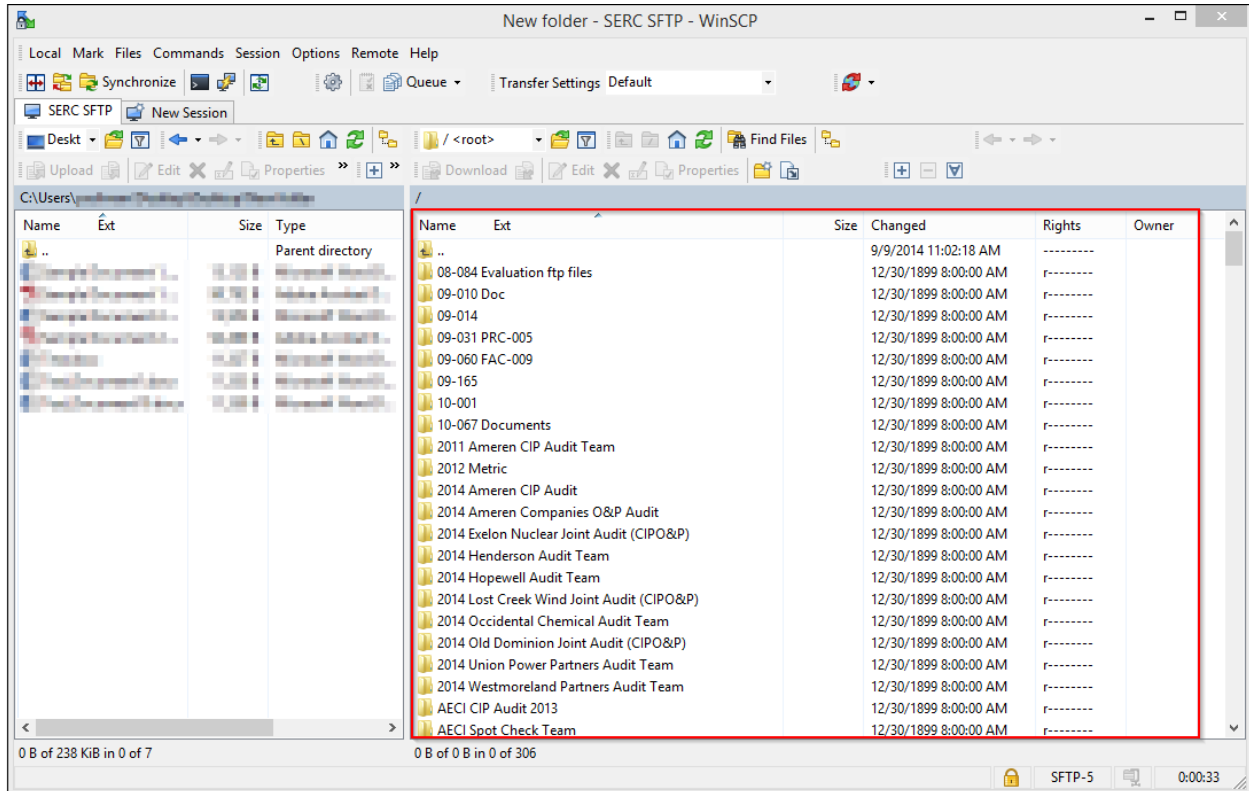


Figure 2: List of Committee Documents

Follow these steps to upload a document:

1. On the left side of the window, navigate to the desired document on your local drive.
2. On the right side of the window, open the destination folder.
3. Drag and drop the document from your local drive to the destination folder.

3.4 WinSCP Specific Behavior

WinSCP has the following specific behaviors and restrictions:

- Deleting a folder or file is not allowed. You cannot delete an accidentally created folder or file.

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- Overwriting a file is not allowed. If you attempt to overwrite a file, the client will display a Confirmation dialog box. If you click the **Yes** button, an Error dialog will prompt you to press **Delete** or **Retry**. Both options will fail.
- The “..” file option at the top of the Folder tree always displays a date that does not correspond to a recent date. This is a known error that does not affect actual files or functionality.

4.0 SFTP Net Drive Free Client

This section explains how to access the SFTP NetDrive Free client. It includes these sections:

- Downloading SFTP NetDrive Free Client
- Logging in to SFTP NetDrive Free Client
- Managing the Documents
- SFTP Net Drive Free Specific Behavior

4.1 Downloading SFTP Net Drive Free Client

Use the following link to download the SFTP Net Drive Free client:

<https://www.eldos.com/files/sftpnetdrive2/SftpNetDriveFree.exe>

4.2 Logging in to SFTP Net Drive Free Client

Use the following access information to log in to the SFTP Net Drive Free client:

- Host: portal.serc1.org
- Username: <same as Compliance Portal username>
- Password: <same as Compliance Portal password>

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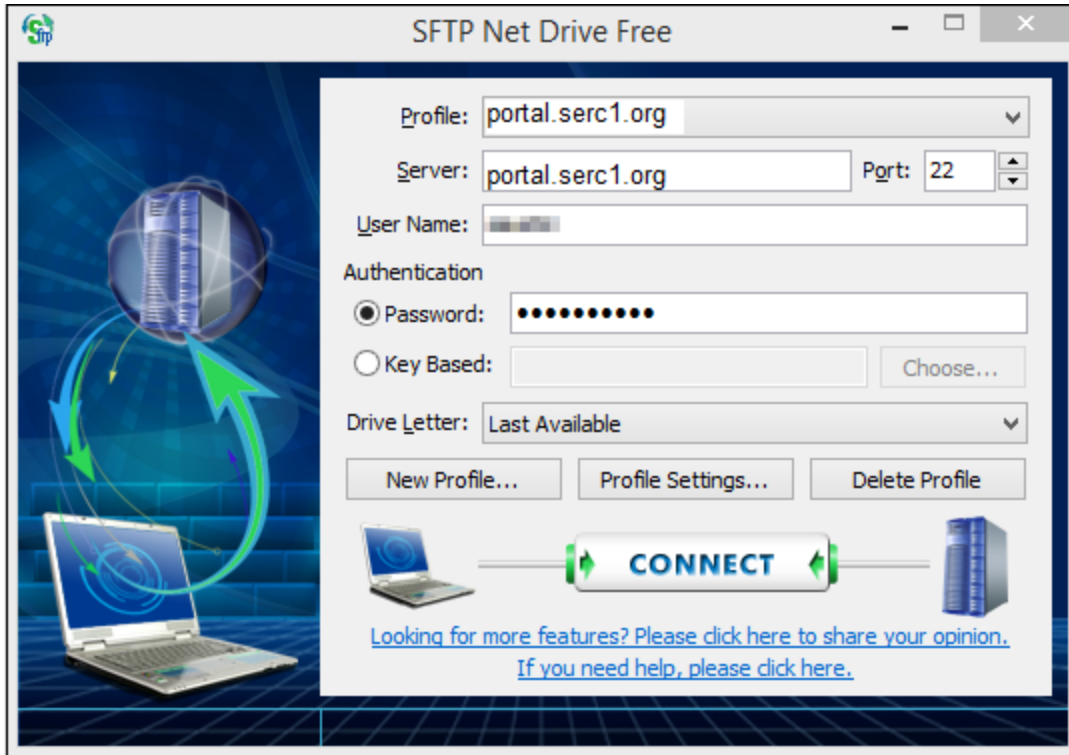


Figure 3: SFTP Net Drive Free Login Dialog Box

4.3 Managing the Documents

Once you log in to the SFTP Net Drive Free client, a network drive will be mounted onto your computer, as shown in Figure 4.

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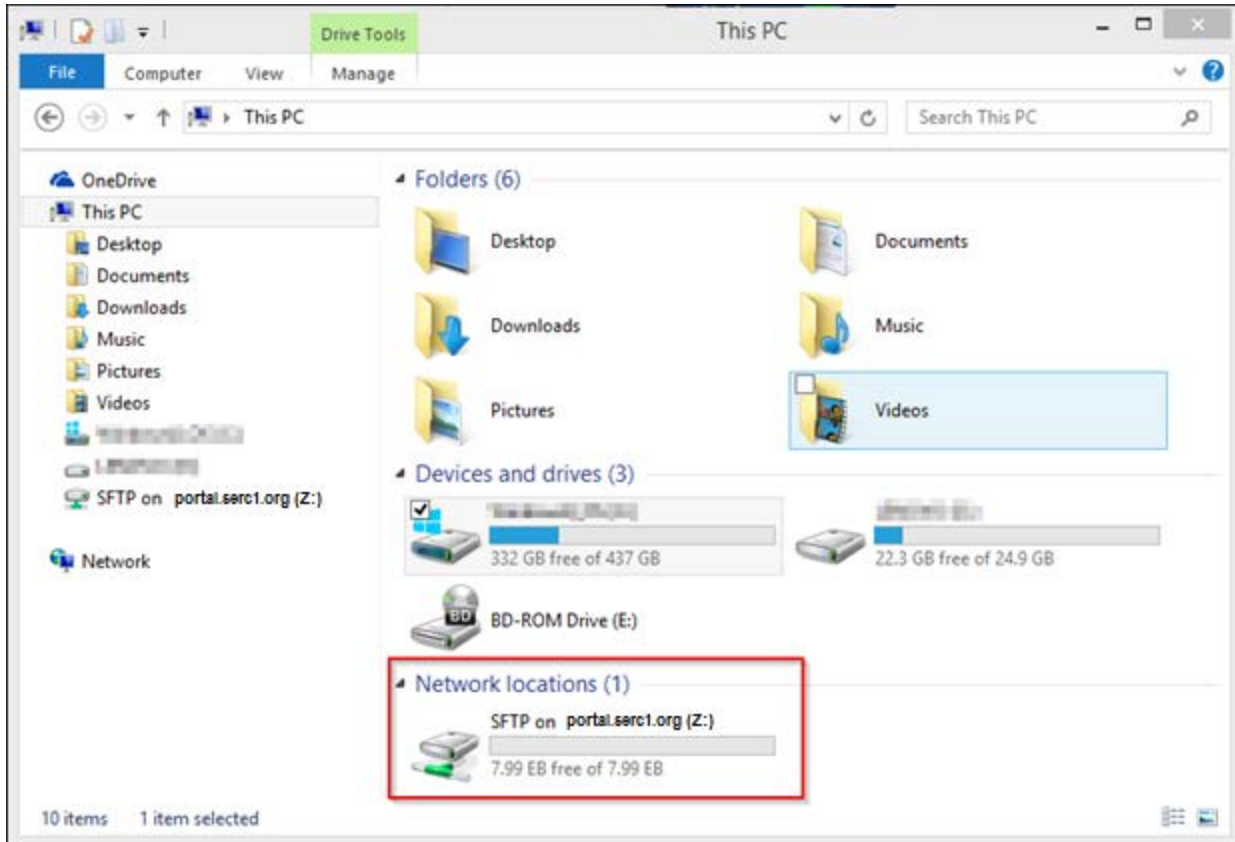


Figure 4: SFTP Network Drive

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Click the network drive to open a document browser. The highlighted section on the right side displays a list of all the folders and documents from the committee(s) to which the logged-in user belongs.

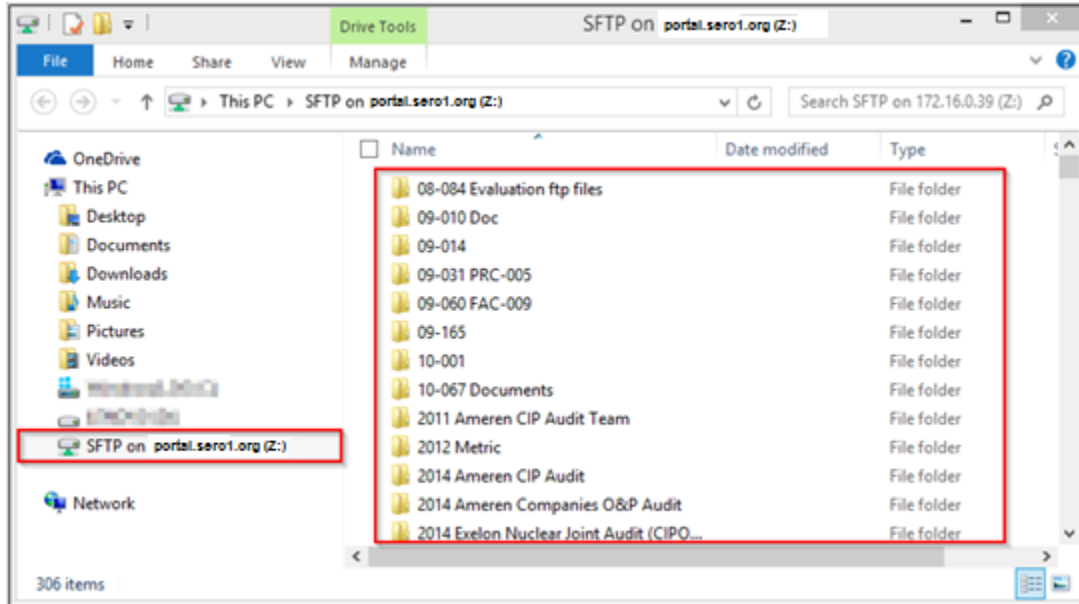


Figure 5: SFTP List of Committees

Follow these steps to upload a document:

1. On the left side of the window, navigate to the desired document on your local drive.
2. On the right side of the window, open the destination folder.
3. Drag and drop the document from your local drive to the destination folder.

4.4 SFTP Net Drive Free Specific Behavior

The client seems to allow you to delete files, although the server does not allow deletion. This happens because the client ignores the server error that is sent when you try to delete a file. The file is not actually deleted. If you refresh the client, the file displays again.

5.0 BitKinex Client

This chapter explains how to access the BitKinex client. It includes these sections:

- Downloading BitKinex
- Logging in to BitKinex

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- Managing the Documents
- BitKinex Specific Behavior

5.1 Downloading BitKinex Client

Use the following link to download the BitKinex client:

<http://www.bitkinex.com/>

5.2 Logging in to BitKinex

Use the following access information to log in to the BitKinex client:

- Host: portal.serc1.org
- Username: <same as Compliance Portal username>
- Password: <same as Compliance Portal password>

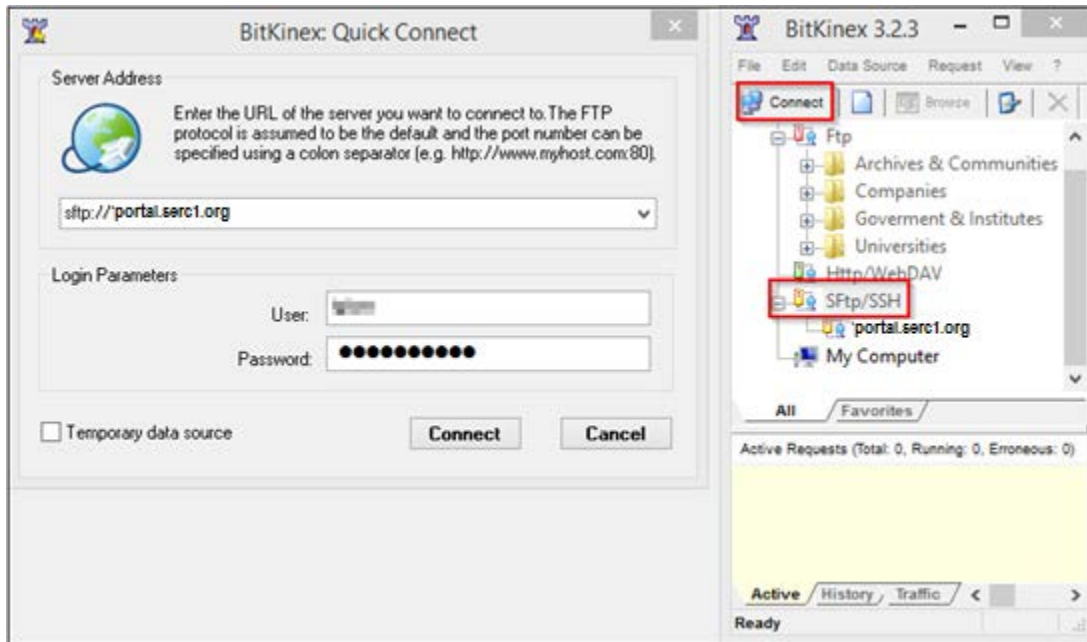


Figure 6: BitKinex Quick Connect Dialog Box

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5.3 Managing the Documents

The highlighted section on the left side of the window displays a list of all the folders and documents from the committee(s) to which the logged-in user belongs.

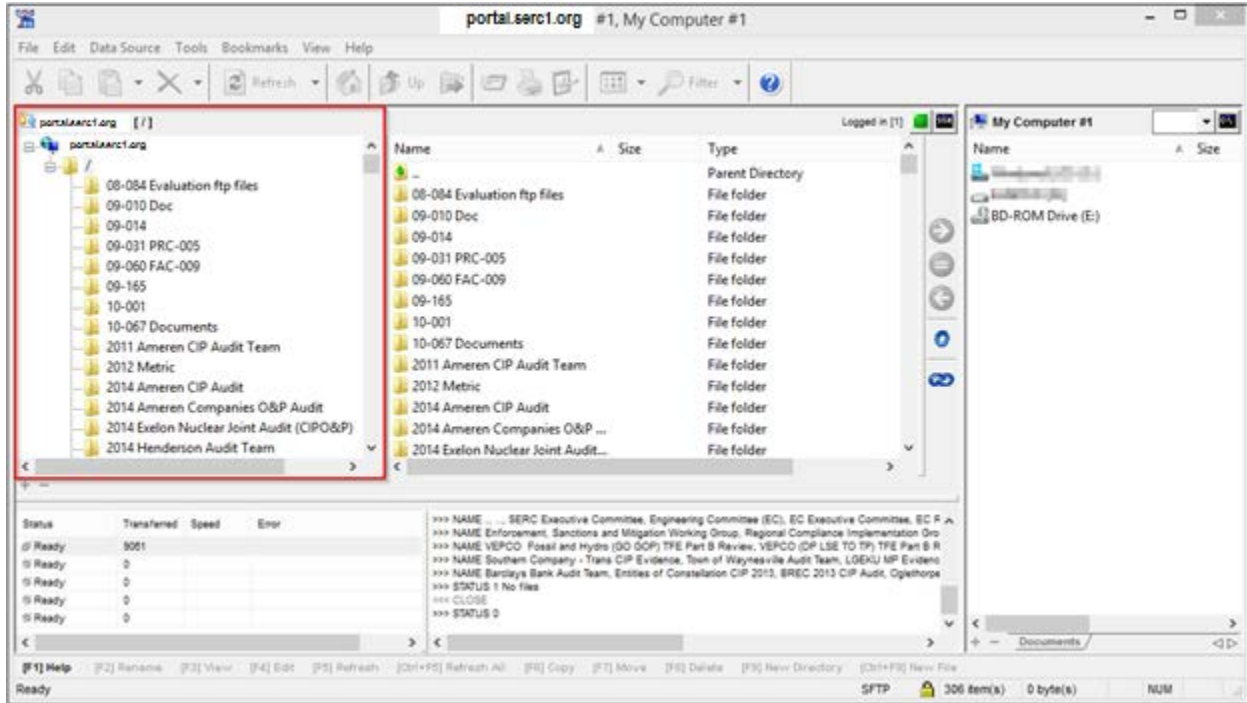


Figure 7: BitKinex Document List

Follow these steps to upload a document:

1. On the right side of the window (My Computer), navigate to the desired document on your local drive.
2. On the left side of the window, open the destination folder.
3. Drag and drop the document from your local drive to the destination folder.

5.4 BitKinex Specific Behavior

BitKinex has the following specific behaviors and restrictions:

- When the client experiences some errors, it will retry an operation for a few minutes before failing. Some of these errors include:
 - User attempts to delete a file, which is not allowed.
 - Client attempts to download a zero-byte file.

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- After uploading a file, the client will not display file information, such as date and file size, until a refresh is performed.
- The client seems to allow a user to overwrite a file, although overwriting is not allowed. No files on the server will be modified. However, if the file is the same name and size as the file on the server, the client may not display an error message that it could not overwrite the file.
- After certain types of errors, the client may fail and report all files as zero length, display names without file extensions, and change file icons to a generic white icon. If these errors occur, restart the client, and select **Refresh All** from the main **File** menu to clear the client's erroneous data.
- The client may display a folder as a subfolder to itself. To correct this issue, restart the client and perform a **Refresh All** from the main **File** menu.

6.0 Filezilla Client

This section explains how to access the Filezilla client. It includes these sections:

- Downloading Filezilla Client
- Logging in to Filezilla
- Managing the Documents

6.1 Downloading Filezilla Client

Use the following link to download the Filezilla client:

<https://filezilla-project.org/download.php?type=client>

6.2 Logging in to Filezilla

Use the following access information to log in to the Filezilla client:

- Host: portal.serc1.org
- Username: <same as Compliance Portal username>
- Password: <same as Compliance Portal password>

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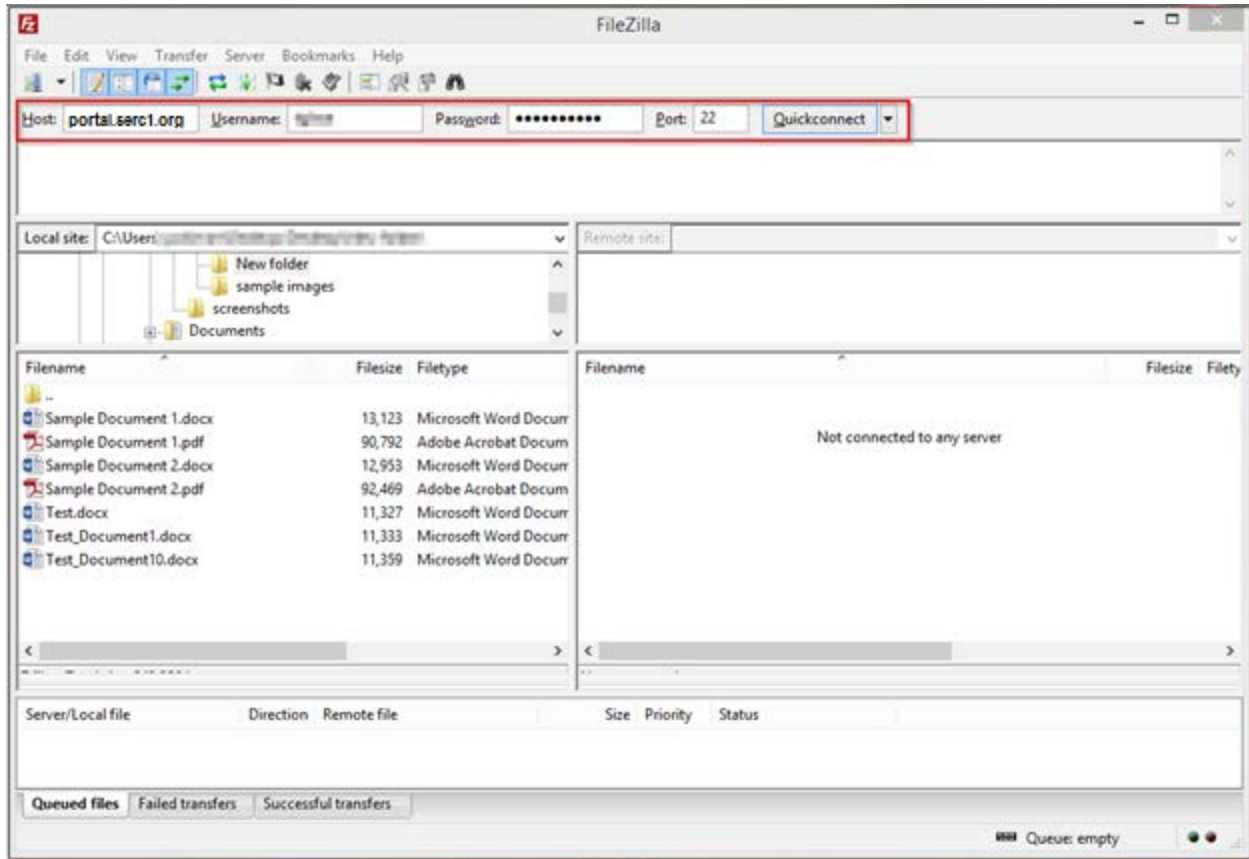


Figure 8: FileZilla Window

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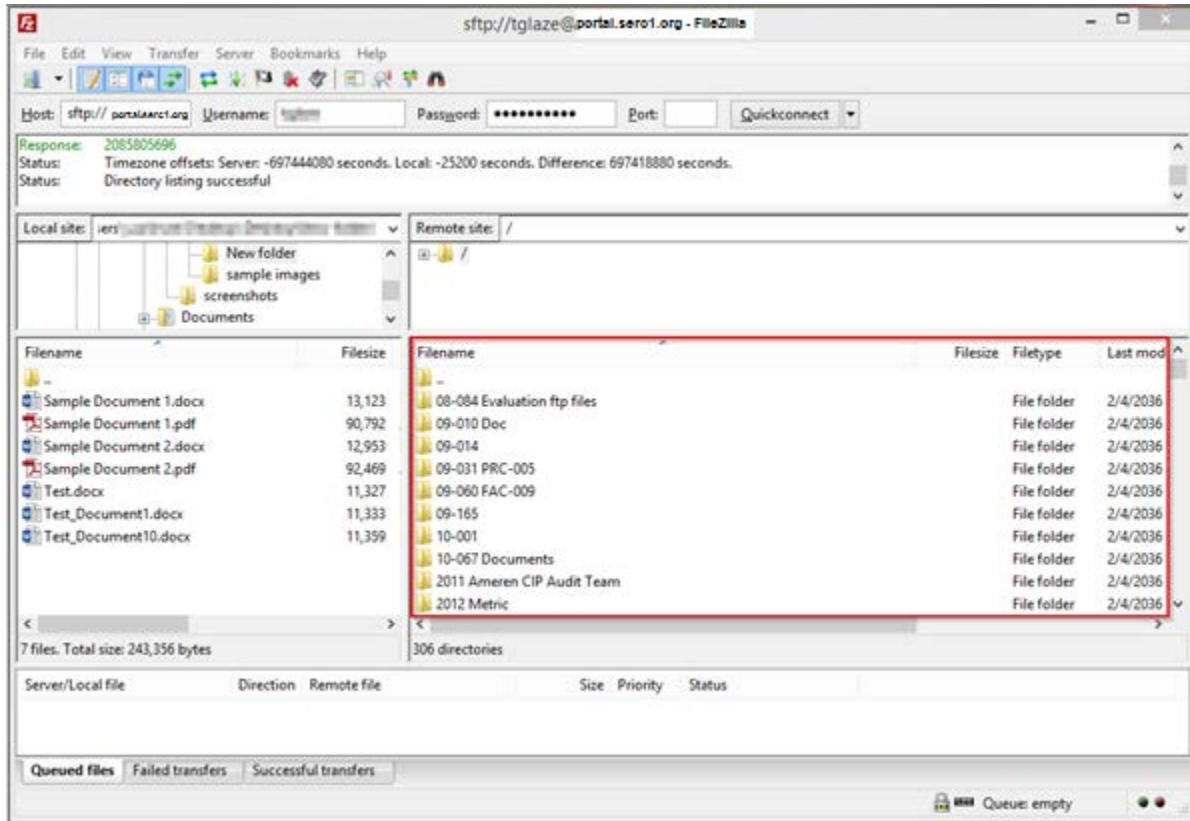


Figure 9: FileZilla Document List

Follow these steps to upload a document:

1. On the left side of the window, navigate to the desired document on your local drive.
2. On the right side of the window, open the destination folder.
3. Drag and drop the document from your local drive to the destination folder.

7.0 Revision History

Revision	Date	Originator	Comments
0	October 3, 2014	Teresa Glaze	Initial release

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