# File transfers to the SFTP server

*This guide contains a simplified description of automating operations on SFTP server with WinSCP.*

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## Step 1. Download and Install WinSCP

WinSCP is an open source free SFTP client, FTP client, WebDAV client, S3 client and SCP client for Windows. Its main function is file transfer between a local and a remote computer. Beyond this, WinSCP offers scripting and basic file manager functionality.
[Download](#) WINSCP from official site and [install](#) it according producer requirements.
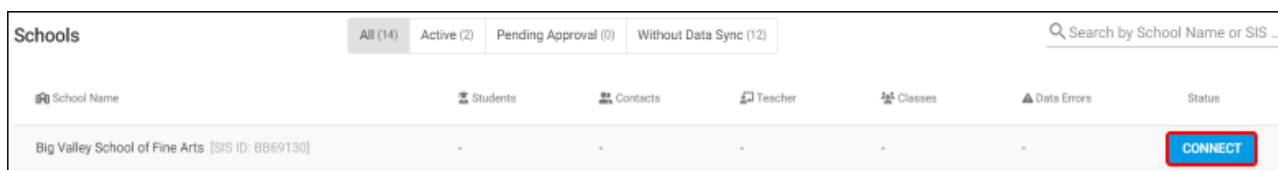
## Step 2. Get the SFTP credentials to transfer the .csv files

1. You receive Instruction with the link to your account registration in a separate email. Activate admin account in GG4L School Passport according to instruction.
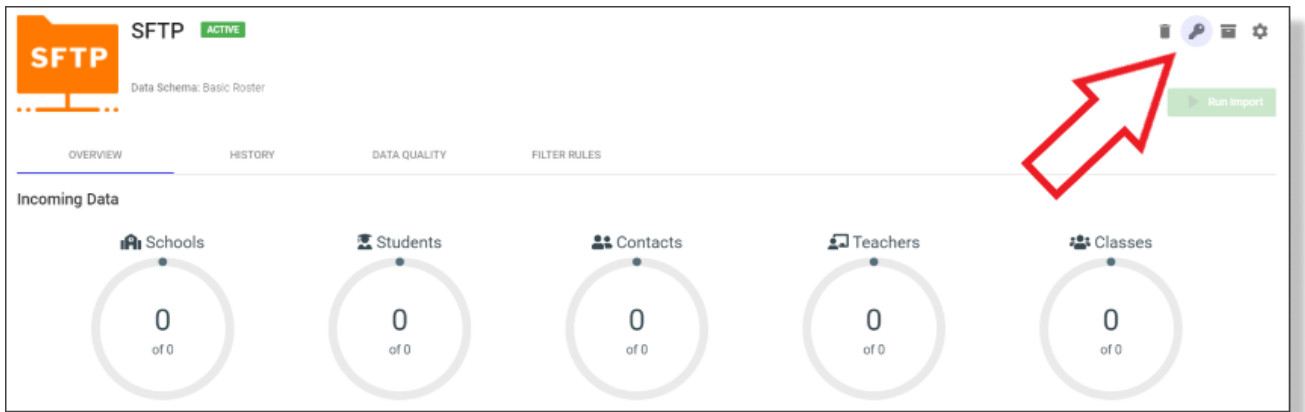
> ### ⓘ Info
>
> Link for account setup expires in 24 hours.

2. Go to the [School Passport](#) platform and sign in as a **District Admin**.
3. Go to Search, enter the district's name, and then select it.
4. Log in to the console > Click **Connect**.



5. Go to **Home** menu > Select **SFTP Import app**.
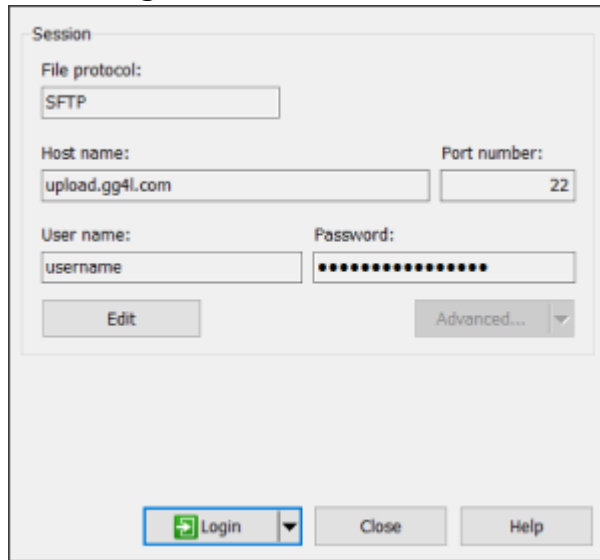6. Click 🔑 **API Credentials**.

7. Click **Copy** and save SFTP Credentials to any text file.



# Step 3. Generate a file transfer code in WinSCP with the SFTP credentials

1. To run WinSCP, click ⬛ icon on the desktop or in the Windows Start Menu.
2. On the **Login Dialog** window:
    - Select **SFTP** file protocol.
    - Enter your SFTP credentials into related fields.

- Click **Login**.

4. On the **Session** menu, click **Generate Session URL/Code**.
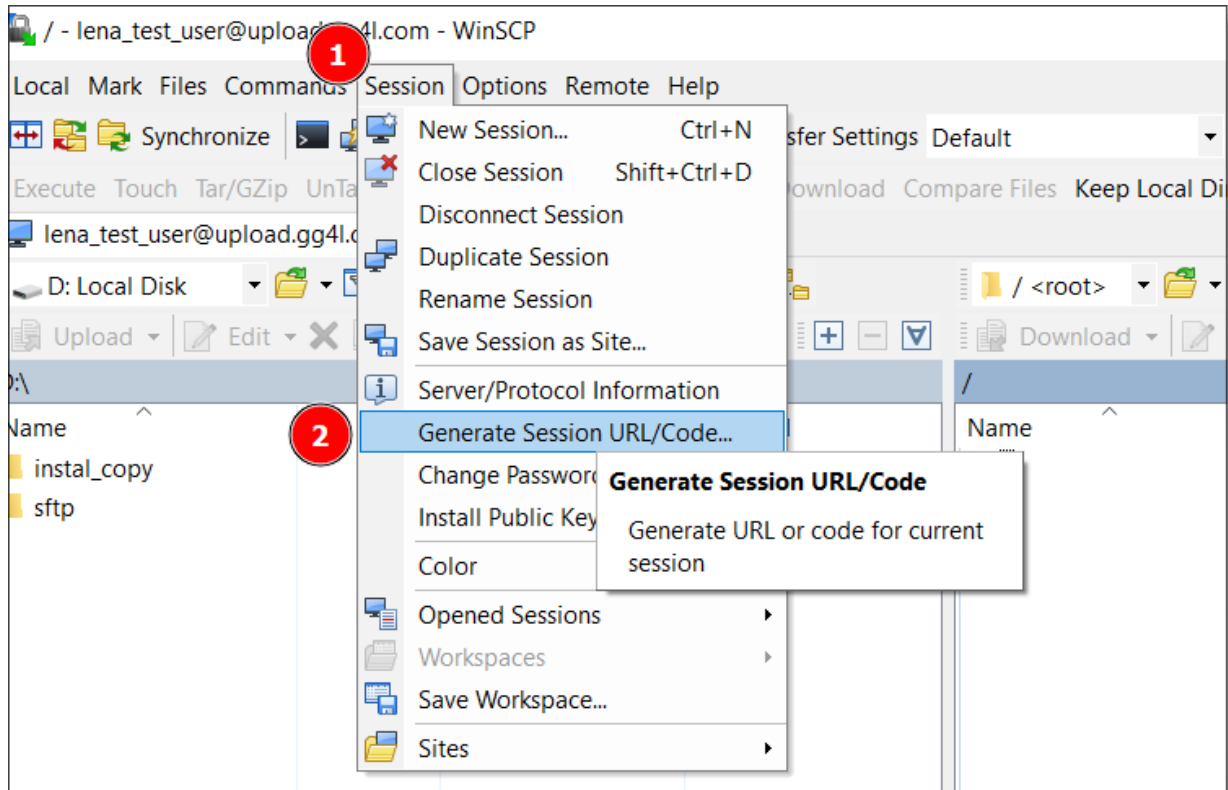


5. On the **Generate Session URL/Code** window, go to **Script** tab, where:

- *Row #1* contains the path to the WinSCP setup file.
- *Row #2* contains your credentials.
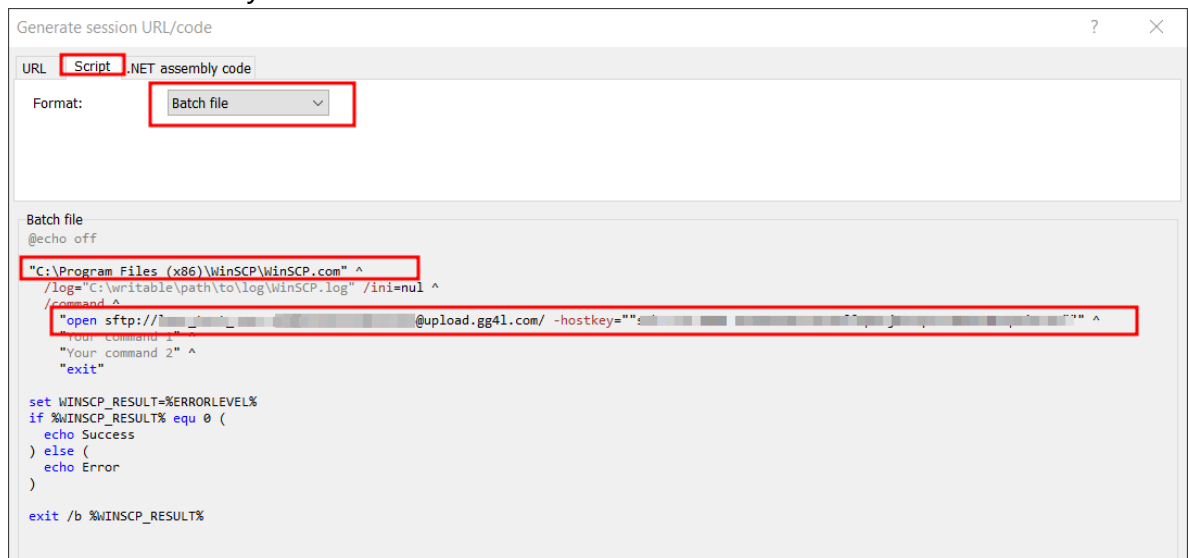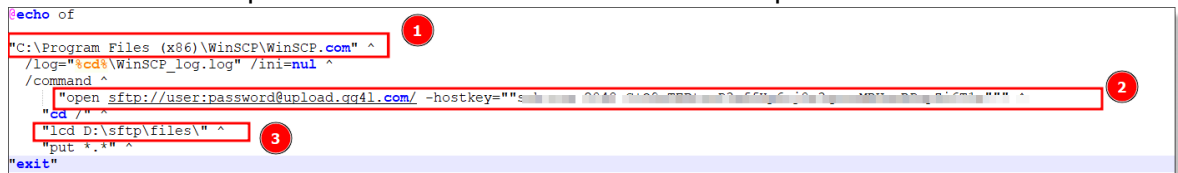


6. Copy rows #1 and #2 to any text file.

# Step 4. Download the batch file template

Download local_files_to_sftp.bat file and save on the directory with read/write permission.

# Step 5. Modify the template batch file with file transfer code

1. Open **local_files_to_sftp.bat** in any text editor. For example, it is opened in Notepad++, where:\
   - *Row #1* contains path to the WinSCP setup file.
   - *Row #2* contains user's credentials.
   - *Row #3* contains path to the local folder with .csv or .zip files.



2. Replace rows #1 and #2 with the data saved in step 3.5.
3. In row #3, enter the folder path where your .csv files or archive are stored. For example, D:\sftp\files\).
4. Save the modified batch file save on the directory with read/write permission.

# Step 6. Schedule file transfers to SFTP server

You can combine scripting/automation functionality of WinSCP with Windows scheduling capability.

1. To add a new scheduled task, open **Task Scheduler**:
   - *Windows 11:* Go to **Windows Start** menu > All apps > Windows Tools > Task Scheduler. Or in a search box, enter **Task Scheduler**.
   - *Windows 10:* Go to **Windows Start** menu > Windows Administrative Tools > Task Scheduler. Or in a search box, enter **Task Scheduler**
   - *Windows 8.1:* Right-click **Windows Start** menu> Control Panel > System and Security > Administrative Tools > Schedule Tasks.
   - *Windows 7:* Go to **Windows Start** menu > Control Panel > System and Security > Administrative Tools > Schedule Tasks.
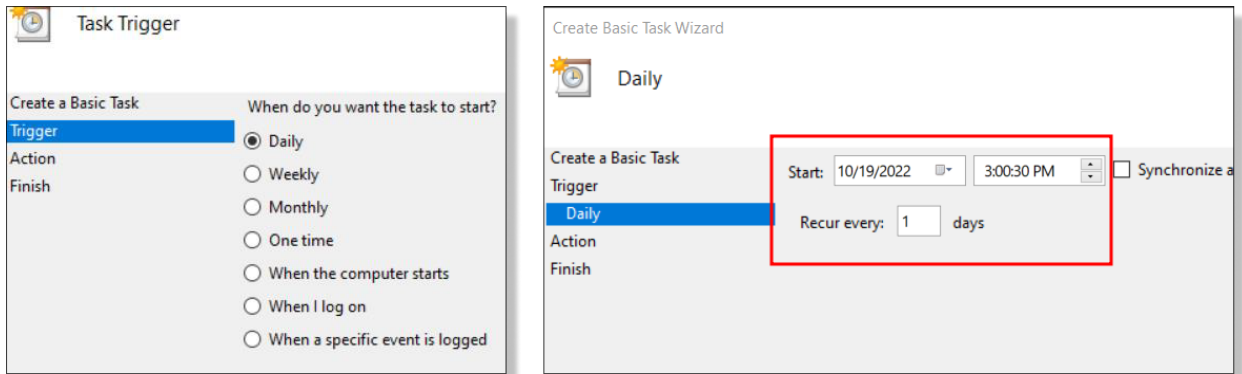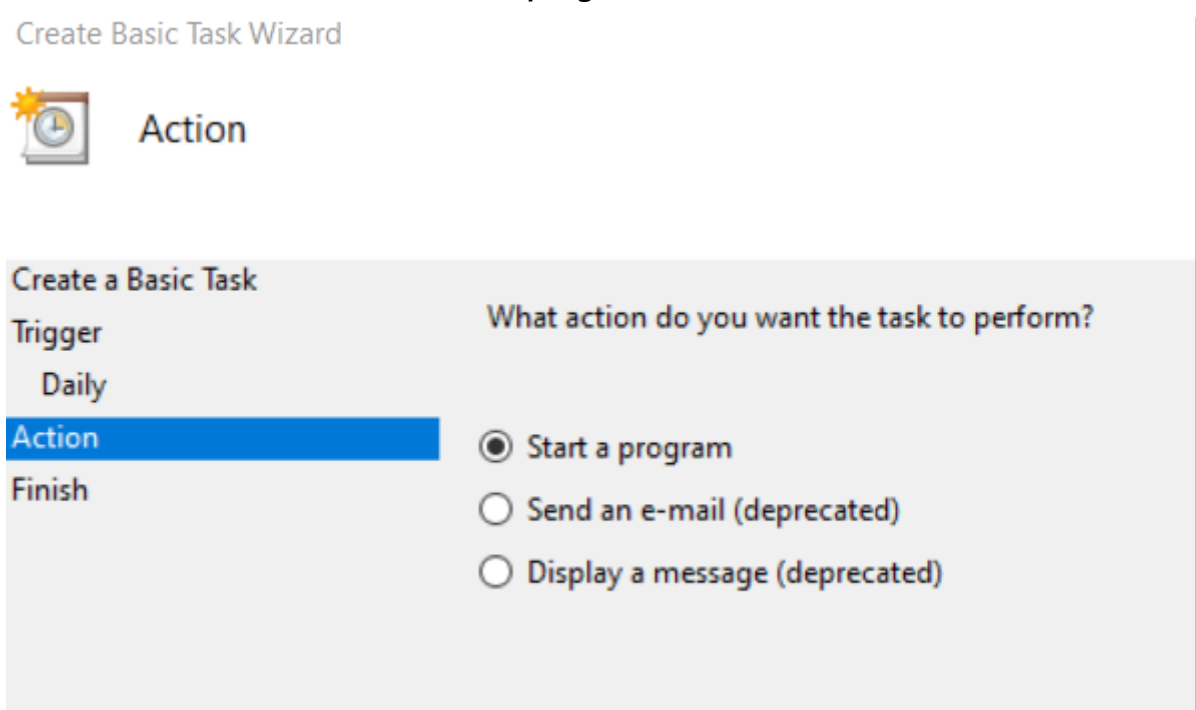2. On the **Task Scheduler** menu, go to **Action** panel > **Create Basic Task**.
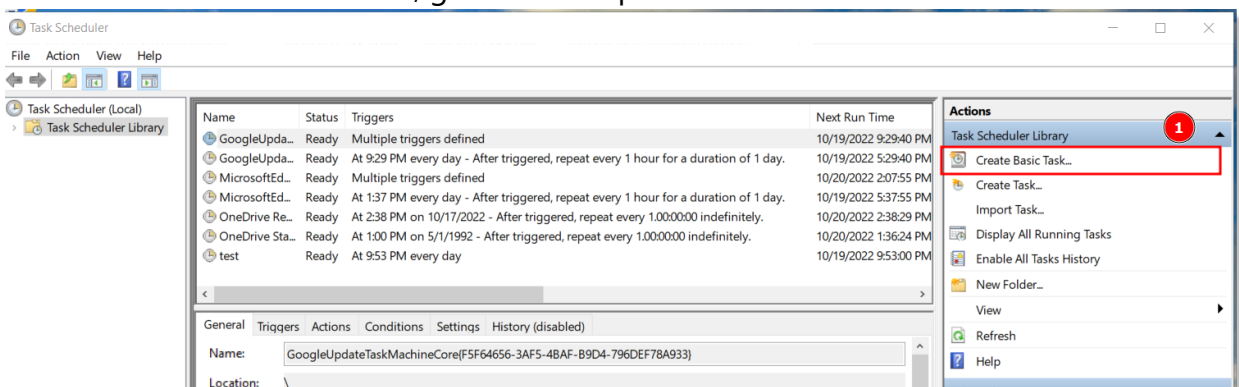
3. On the **Create a Basic Task** window, enter your task name, and then click **Next**.
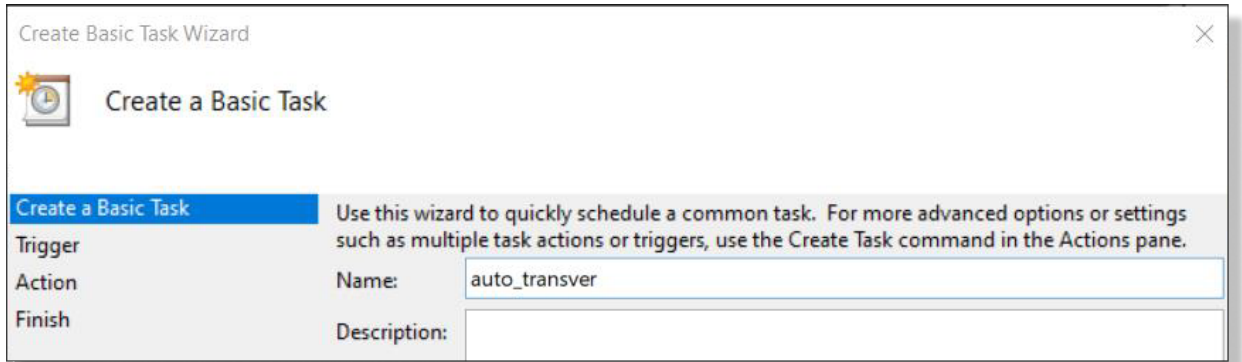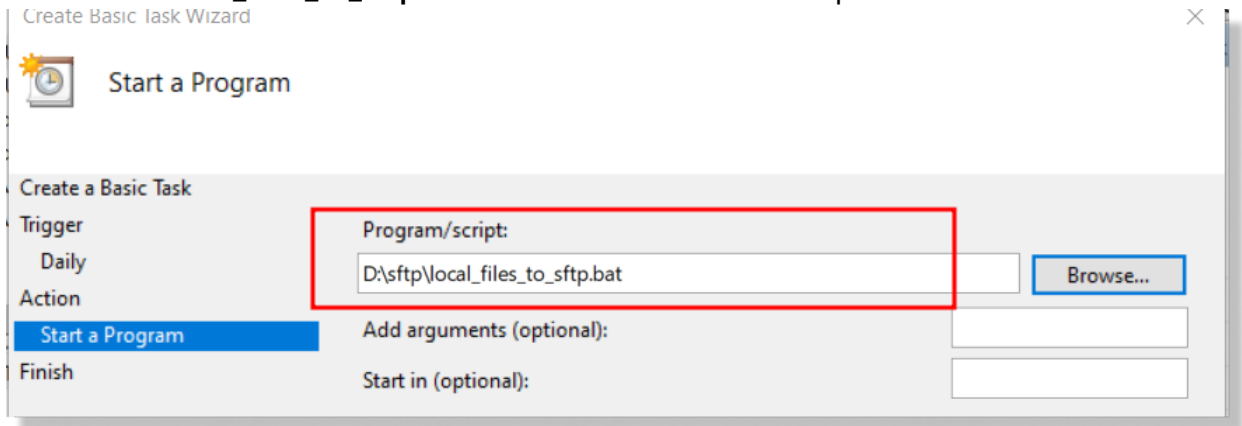


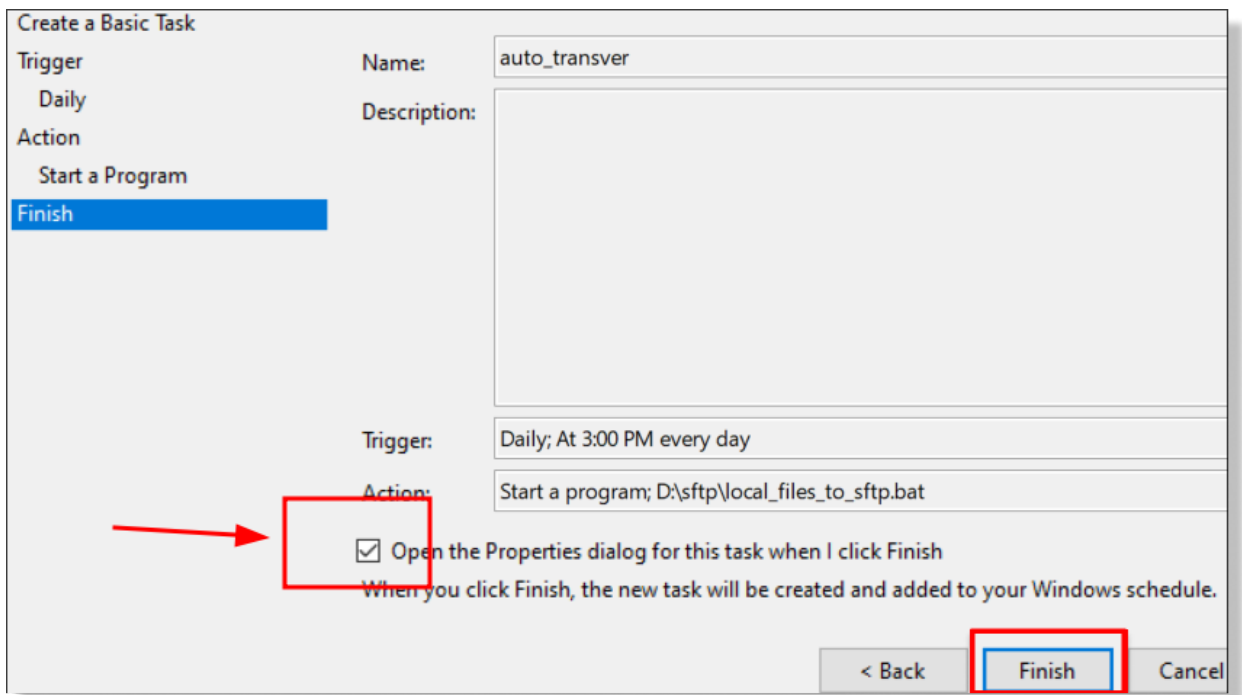4. Choose when the task should be run and click **Next**.



5. Go to the **Action** tab, choose **Start a program** and then click **Next**.

6. Browse for **local_files_to_sftp.bat** in the folder from the step 5.4 and click **Next**.



7. Select the checkbox and click **Finish**.



🔥 **Important** ⌄

You must have administrative rights and a non-empty password.



8. Enter the password and click **OK**.