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. <u>Download</u> WINSCP from official site and <u>install</u> 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.

i 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.

| Schools | All (14) | Active (2) Pending Approval (0) | |)) Without Data Syr | Without Data Sync (12) | | Q Search by School Name or SIS | | |
|--|----------|---------------------------------|----------|---------------------|------------------------|------------|--------------------------------|---------|--|
| 🛱 School Name | | 🛣 St | udents 🎂 | Contacts | 🖅 Teacher | 철로 Classes | 🛦 Data Errors | Status | |
| Big Valley School of Fine Arts [SIS ID: 8869130] | | | | | | | | CONNECT | |

- 5. Go to Home menu > Select SFTP Import app.
- 6. Click P API Credentials.

| SFTP ACTIVE Data Schema: Basic Roster | | | | E Destropert |
|--|--------------|--------------|-----------|--------------|
| OVERVIEW HISTORY | DATA QUALITY | FILTER RULES | | \sim |
| Incoming Data | | | | • |
| A Schools | Z Students | La Contacts | Teachers | a Classes |
| 0 0 to | O or 0 | 0 of 0 | 0 0 to | 0 0 to |

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

| SFTP Crede | entials | |
|------------|-----------------|--------|
| Host | upload.gg4l.com | 🗍 Сору |
| Port | 22 | Сору |
| Username | ••••• | Сору |
| Password | ••••• | Сору |
| | | Close |

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.

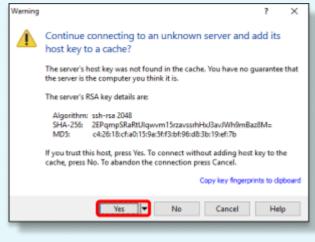
| File protocol: SFTP | | |
|------------------------|-----------|--------------|
| arir | | |
| Host name: | | Port number: |
| upload.gg4l.com | | 22 |
| User name: | Password: | |
| username | •••••• | ••••• |
| Edit | | Advanced |
| | | |
| | | |
| | | |
| | | |

(i) Info ∽

Session data can be stored on the site so you don't have to enter it every time you connect. To save your current session, use the command **Session** > **Save Session** as **Site**. To learn more, see <u>Saving Opened Session</u>.

○ Info ∨

If you connect for the first time, an SSH server requires verification of the host key. Click Yes.



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

| / - lena_test_user@uploa | | | | | | | |
|------------------------------|--|--------------------|-----------------|------------------|----------|---------------------|--|
| Local Mark Files Command | ocal Mark Files Commanus Session Options Remote Help | | | | | | |
| 🕂 🔁 🔁 Synchronize 🗖 🚽 | P | New Session | Ctrl+N | sfer Settings D | efault | - | |
| Execute Touch Tar/GZip UnTa | Ž | Close Session | Shift+Ctrl+D | ownload Com | npare Fi | iles Keep Local Di | |
| lena_test_user@upload.gg4l.c | _ | Disconnect Session | on | | | | |
| D: Local Disk 🔹 🚰 🕶 🖸 | Ļ | Duplicate Session | n | | = _ / | <root> 🔻 🚰 🕶</root> | |
| - | | Rename Session | | | | | |
| 🔄 Upload 👻 📝 Edit 👻 📘 | ۲. | Save Session as S | ite | + - V | | Download 👻 📝 | |
|):\ | į | Server/Protocol I | nformation | | 1 | | |
| Name [^] 2 | | Generate Session | URL/Code | | Name | e | |
| instal_copy | | Change Passwore | Generate Sessio | on URL/Code | | | |
| sftp | | Install Public Key | | or code for curr | ent | | |
| | | Color | session | | | | |
| | - | Opened Sessions | • | | | | |
| | | Workspaces | | | | | |
| | ۳. | Save Workspace. | | | | | |
| | | Sites | • | | | | |
| L | _ | | | - | | | |

- 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.

| Senerate session URL/code | ? | \times |
|--|---|----------|
| URL Script .NET assembly code | | |
| Format: Batch file V | | |
| | | |
| | | |
| Batch file Decho off | | |
| <pre>"C:\Program Files (x86)\WinSCP\WinSCP.com" ^ /log="c:\writable\path\to\log\WinSCP.log" /ini=nul ^</pre> | | |
| /command A | | |
| "open sftp://@upload.gg4l.com/ -hostkey="": | | |
| "Your command 2" ^ | | |
| "exit" | | |
| set WINSCP_RESULT=%ERRORLEVEL% if %WINSCP_RESULT% equ 0 (| | |
| echo Success | | |
|) else (espe Error | | |
|) | | |
| exit /b %WINSCP_RESULT% | | |
| | | |

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.

| Task Scheduler | | | | | | - 🗆 X |
|----------------------------|-----------------------------|---------|---|--|----|---------------------------|
| File Action View Help | | | | | | |
| 🗢 🔿 🙍 🖬 🚺 | | | | | | |
| Task Scheduler (Local) | Name | Status | Triggers | Next Run Time | Ac | tions |
| > 🔂 Task Scheduler Library | 🕒 GoogleUpda | Ready | Multiple triggers defined | 10/19/2022 9:29:40 PM | Ta | isk Scheduler Library |
| | 🕒 GoogleUpda | Ready | At 9:29 PM every day - After triggered, repeat every 1 hour for a duration of 1 day. | 10/19/2022 5:29:40 PM | 1 | Create Basic Task |
| | MicrosoftEd | | Multiple triggers defined | 10/20/2022 2:07:55 PM | 8 | Create Task |
| | MicrosoftEd OneDrive Re | | At 1:37 PM every day - After triggered, repeat every 1 hour for a duration of 1 day. At 2:38 PM on 10/17/2022 - After triggered, repeat every 1.00:00:00 indefinitely. | 10/19/2022 5:37:55 PM 10/20/2022 2:38:29 PM | | Import Task |
| | - | | At 1:00 PM on 5/1/1992 - After triggered, repeat every 1:00:00:00 indefinitely. | 10/20/2022 1:36:24 PM | | Display All Running Tasks |
| | 🕒 test | Ready | At 9:53 PM every day | 10/19/2022 9:53:00 PM | | Enable All Tasks History |
| | < | | | | | New Folder |
| | · | | | , | | View |
| | General Triggers | Action | s Conditions Settings History (disabled) | | G | Refresh |
| | Name: G | oogleUp | dateTaskMachineCore{F5F64656-3AF5-4BAF-B9D4-796DEF78A933} | ^ | ? | Help |
| | Location: \ | | | | | 1 |

3. On the Create a Basic Task window, enter your task name, and then click Next.

| Create Basic Task Wizard | | | × |
|--------------------------|---------------|--|---|
| Create a Basic Task | 9 | | |
| | | | |
| Create a Basic Task | | rd to quickly schedule a common task. For more advanced options or settings | |
| Trigger | such as multi | ple task actions or triggers, use the Create Task command in the Actions pane. | |
| Action | Name: | auto_transver | |
| Finish | Description: | | |

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

| Diask Trigger | | | sic Task Wizard Daily | | | |
|--|---|--|---------------------------------|-------------------------------------|-----------------------|-----------------|
| Create a Basic Task Trigger Action Finish | When do you want the task to start? Daily Weekly Monthly One time When the computer starts When I log on When a specific event is logged | Create a B Trigger Daily Action Finish | | Start: 10/19/2022 Recur every: 1 | □• 3:00:30 PM days | : Synchronize a |

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

| Create Basic Task Wizard | |
|--------------------------|--|
| Action | |
| Create a Basic Task | |
| Trigger | What action do you want the task to perform? |
| Daily | |
| Action | Start a program |
| Finish | Send an e-mail (deprecated) |
| | Display a message (deprecated) |
| | <u> </u> |
| | |
| | |

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

| Create Basic Task Wizard | | × |
|---|--|--------|
| Create a Basic Task Trigger Daily Action | Program/script: D:\sftp\local_files_to_sftp.bat | Browse |
| Start a Program Finish | Add arguments (optional): Start in (optional): | |

7. Select the checkbox and click Finish.

| Name: | auto_transver |
|--------------|---|
| Description | |
| Description: | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Trigger: | Daily; At 3:00 PM every day |
| Action | Start a program; D:\sftp\local_files_to_sftp.bat |
| | |
| | Properties dialog for this task when I click Finish |
| When you cli | ck Finish, the new task will be created and added to your Windows schedule. |
| | |
| | < Back Finish Cancel |
| | Description: Trigger: Action: |

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| General Trig | | | | | |
|--|--|-----------------|--------|----------------------|--|
| Name: | auto_transver | | | | |
| Location: | ١ | | | | |
| Author: | DESKTOP-2807M9J\User | | | | |
| Description: | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Socurity op | | | | | |
| Security op | | | | | |
| When runr | ions ing the task, use the fol | llowing user ac | count: | | |
| | | llowing user ac | count: | Change User or Group | |
| When runr User | | | count: | Change User or Group | |
| When runn User O Run onl | ing the task, use the fol | 'n | count: | Change User or Group | |
| When runr User O Run onl O Run wh | ing the task, use the fol y when user is logged o | n or not |] | | |
| When runn User O Run onl O Run wh Do n | ing the task, use the fol y when user is logged o ether user is logged on not store password. The | n or not |] | | |
| When runn User O Run onl O Run wh Do n | ing the task, use the fol y when user is logged o ether user is logged on | n or not |] | | |

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

| | | GA |
|-------------------|----------------------------|------------|
| Enter user accour | nt information for running | this task. |
| User name: | 🖸 User | ~ |
| Password: | | |
| | ОК | Cancel |