

FTP Uploader Setup and Configuration

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EASi Professional Services

Please send comments or suggestions regarding this document to:
support@easiadmin.com

Introduction	3
FTP Site Configuration.....	4
General tab.....	4
About Your Company's FTP User ID and Password.....	5
Maintaining Your Password	5
Type Tab.....	6
Actions Tab.....	7
Options Tab.....	8
Uploading a file.....	9
Viewing the Importer Console.....	11

Introduction

The following pages outline the steps needed to establish a connection between a User's PC and the EASi data upload utility. The instructions are based on the use of GlobalSCAPE's CuteFTP Program. While EASi does use CuteFTP, virtually any FTP client that supports FTP with TLS/SSL over port 990 will work if properly configured.

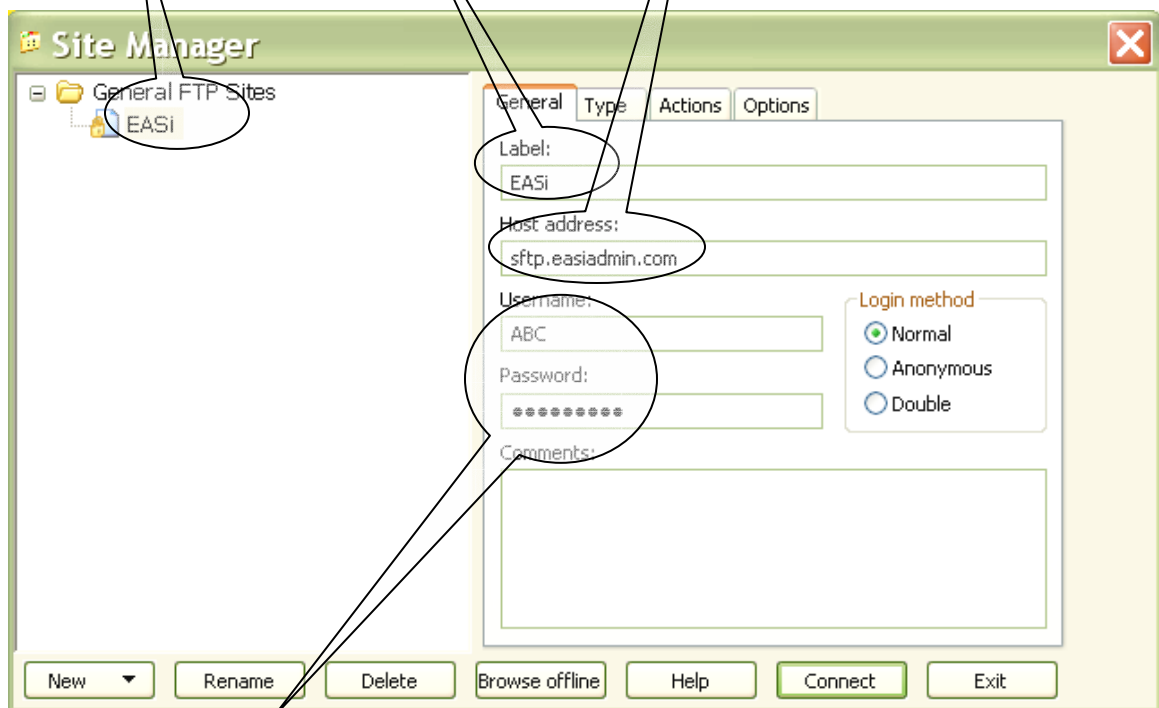
FTP Site Configuration

In order to save your settings for future uploads, EASi recommends defining and saving a site configuration. Adding a site via CuteFTP brings up a dialog box that should be populated as follows:

General tab

The Label can be any value that is you will remember to be the connection to the EASi uploader. Here, we have chosen “ABC Sample”, which will appear both in the list of FTP sites and in the Label field within CuteFTP

The Host address will be **sftp.easiadmin.com** and should never change.



The User ID can be found in the Company Information page in EASi. The Password will be managed by you, the EASi User.

About Your Company's FTP User ID and Password

You will require a User ID and Password for the FTP site. A Client Company ID, which is used as the User ID for FTP, is assigned to all EASi Clients and can be found in your "Company Information" screen...see below instructions.

Maintaining Your Password

The ID and Password are **used to access the FTP site**. You may **not** change your ID, but you will need to maintain your password. Please follow these simple instructions to find your Client Company ID and to maintain your FTP password:

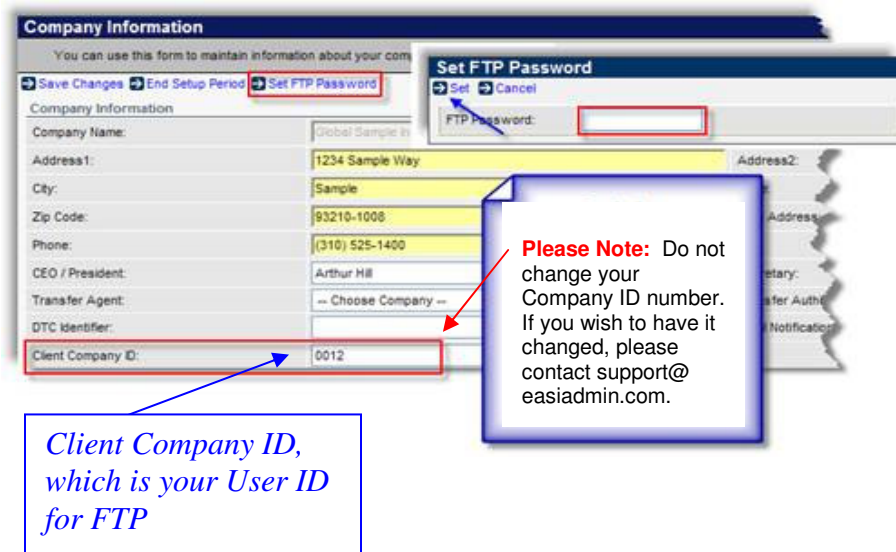
Go to Maintenance>Company Information>



1. To find your Client Company ID, scroll down about 9 rows on the left side of the screen, and make note of it.
2. Stay on the Company Information screen to set your FTP password. Click on "Set FTP Password".
3. Enter your new FTP Password, then click on 'Set'. (Your new password must contain at least 7 characters consisting of 1 number, 1 capital letter and 1 lower case letter).
4. Lastly, click on "Save Changes" to save the changes to your Company Information page.
5. Go back to CuteFTP and type in the new password in the Password field.

➔ [Save Changes](#)

➔ [Set FTP Password](#)

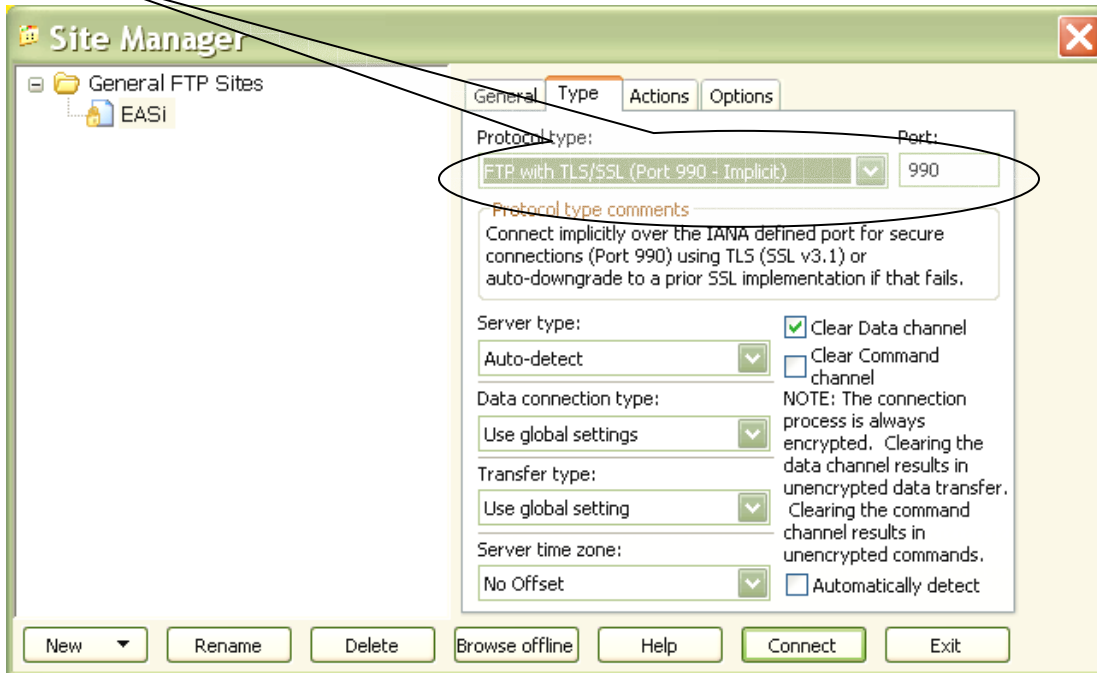
A screenshot showing two overlapping software windows. The background window is 'Company Information' with a 'Client Company ID' field containing '0012' highlighted in red. The foreground window is 'Set FTP Password' with an empty password field highlighted in red. A blue callout box points to the 'Client Company ID' field with the text 'Client Company ID, which is your User ID for FTP'. A red callout box points to the 'Set FTP Password' window with the text 'Please Note: Do not change your Company ID number. If you wish to have it changed, please contact support@easiadmin.com.'.

Client Company ID, which is your User ID for FTP

Please Note: Do not change your Company ID number. If you wish to have it changed, please contact support@easiadmin.com.

Type Tab

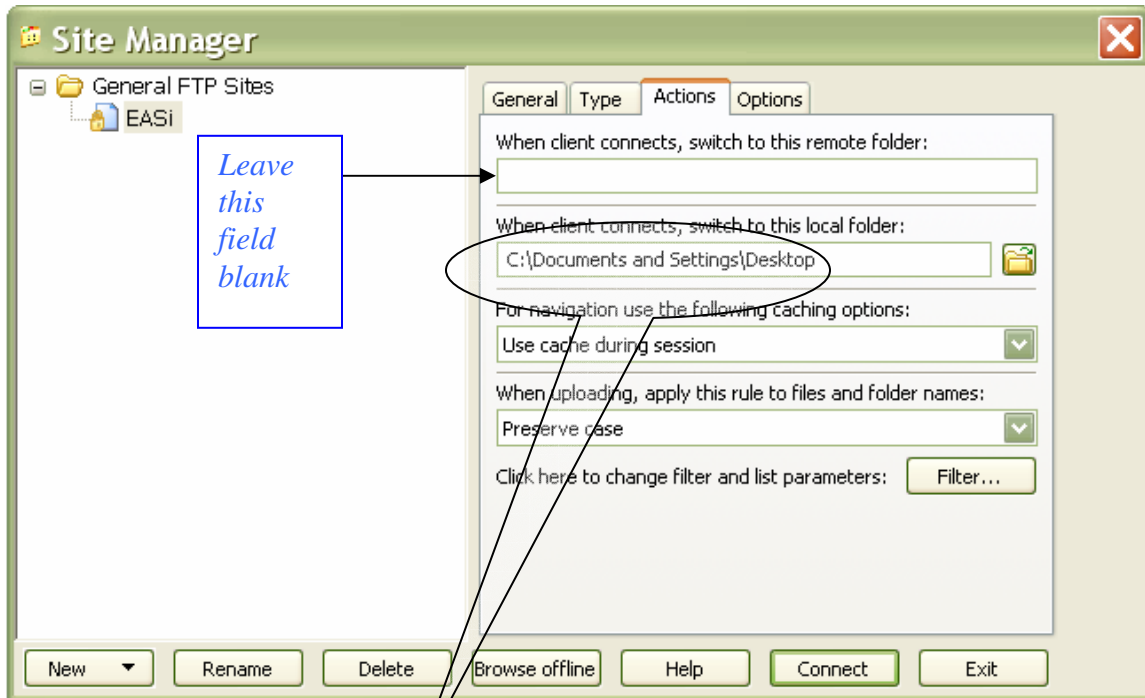
All of the defaults should be selected except for Protocol Type which should be set as shown.



Actions Tab

In the Actions Tab in the **remote folder** field, please leave it blank.

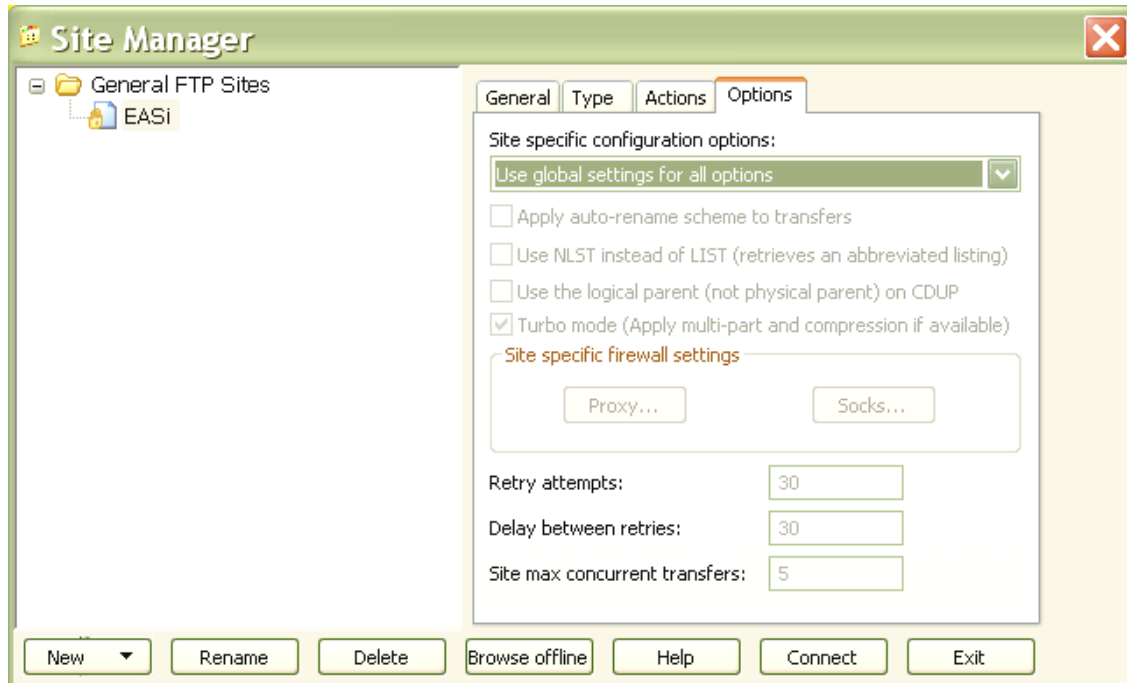
****Note:** This field criterion has been changed on January 22, 2009.



This is the default Local Folder on your local system. You can map this to any folder on your PC and can also change it once in the program. The value entered here will dictate which folder is visible when you first open CuteFTP.

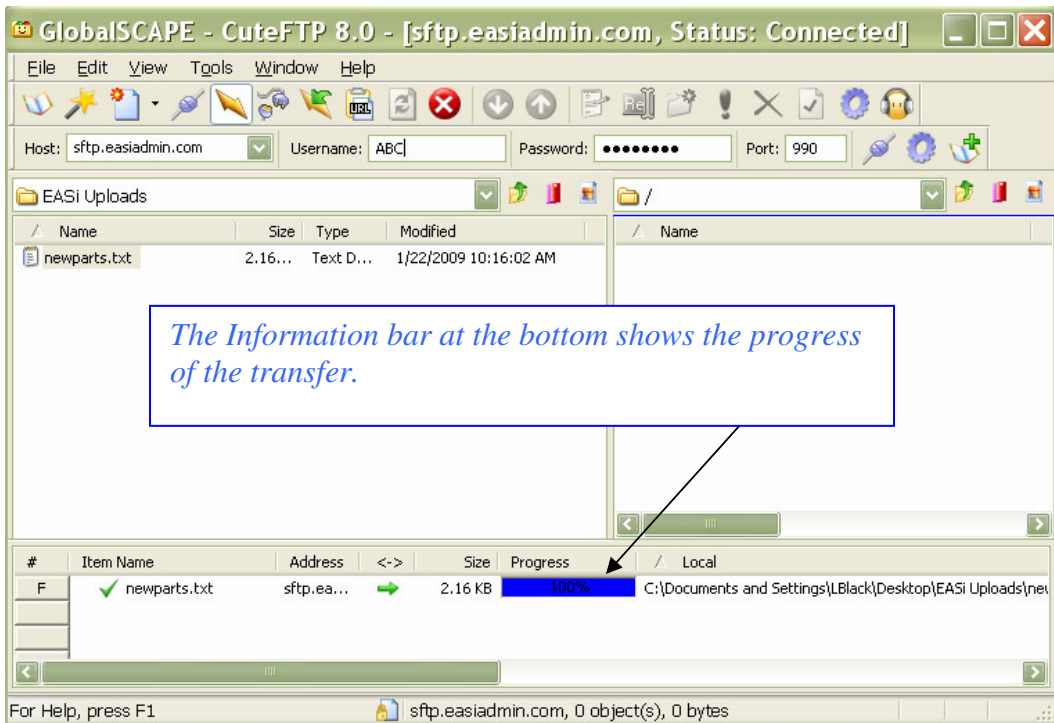
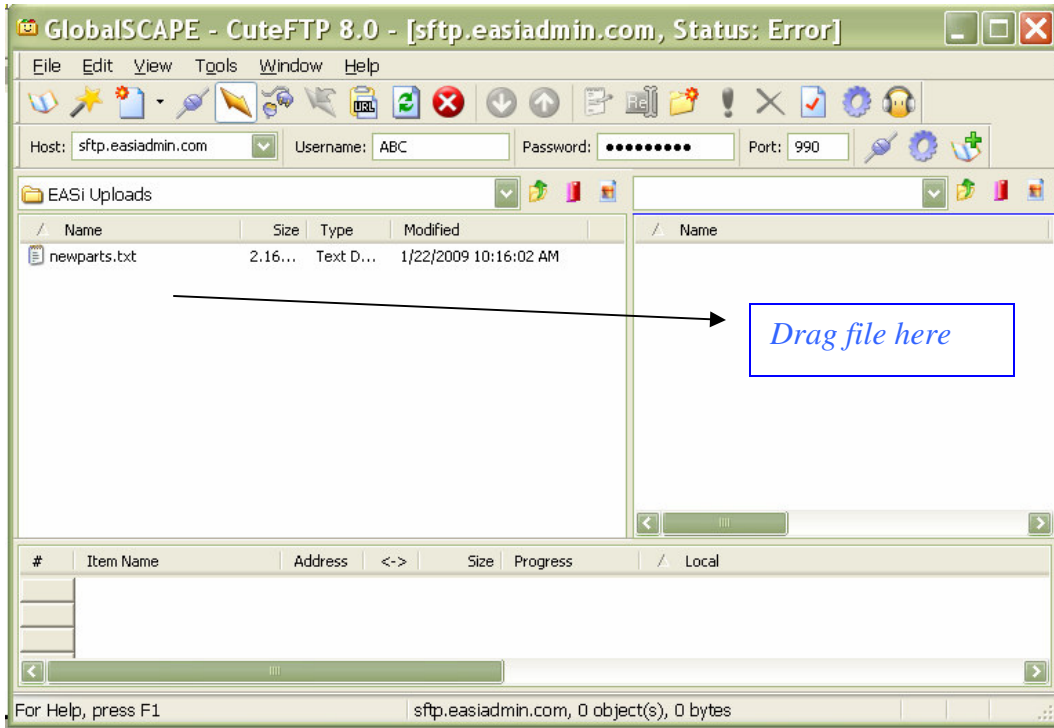
Options Tab

Leave all values set to the defaults.

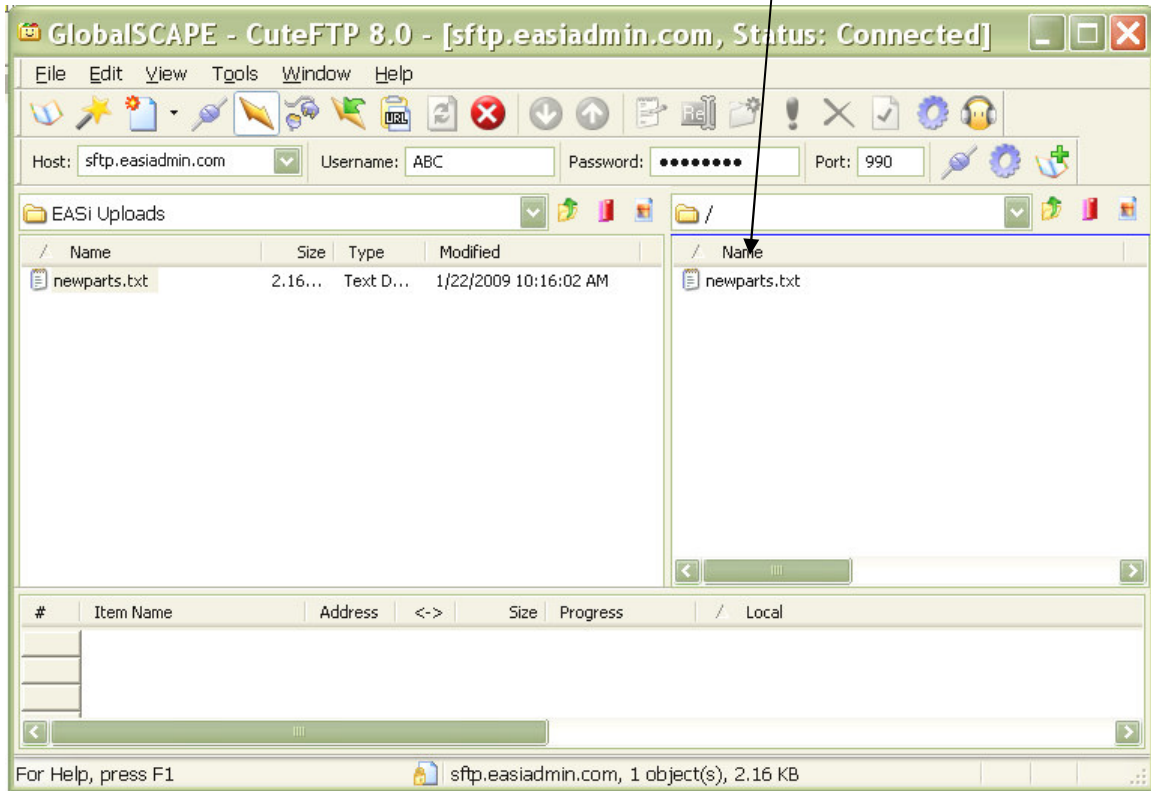


Uploading a file

Uploading a file is a simple drag-and-drop function from the local folder (left of the screen) to the Uploader folder (right of the screen).



Once the file has transferred, you will see it in right-hand Window Pane...

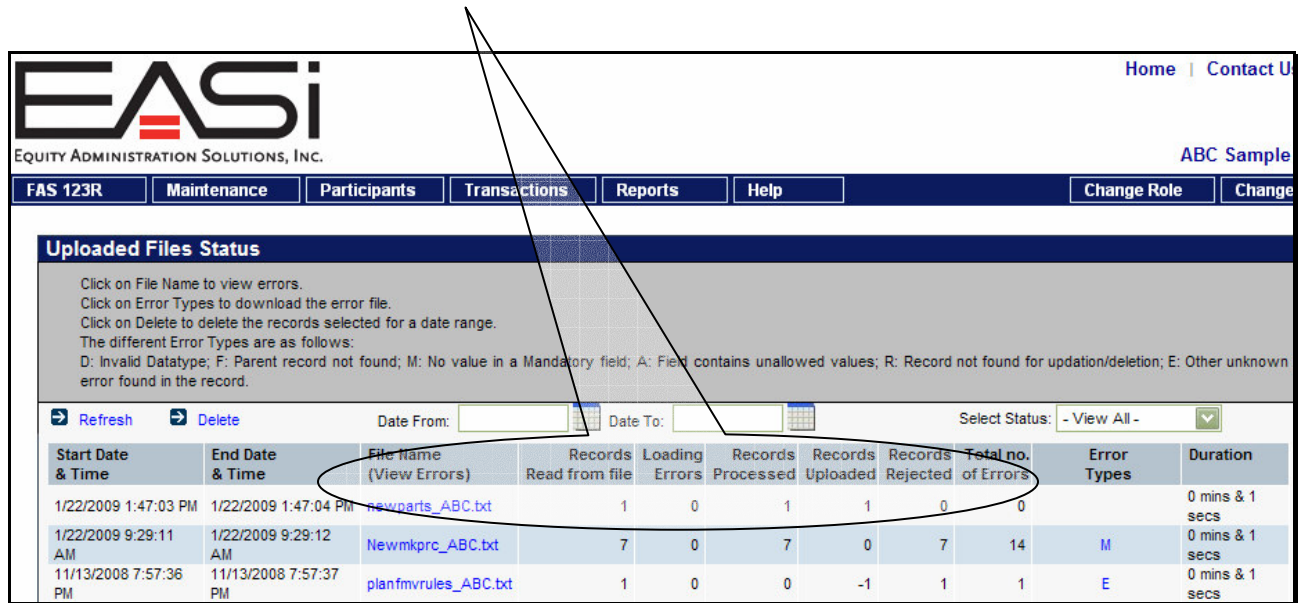


*** Note

The file will not remain in the transfer window for very long. The Importer will check the folder for changes periodically (approximately once/minute) and will delete it once it has been processed. This behavior is normal.

Viewing the Importer Console

Once the file has been received by the EASi system, you can see the status of the processing – as well as any errors that may occur – through the Importer console. To view your upload status in EASi, please go to Maintenance>Upload Status.



The screenshot displays the EASi web interface. At the top, there is a navigation bar with links for 'Home' and 'Contact Us'. Below this is a menu with options: 'FAS 123R', 'Maintenance', 'Participants', 'Transactions', 'Reports', 'Help', 'Change Role', and 'Change'. The main content area is titled 'Uploaded Files Status' and contains instructions on how to view errors, download error files, and delete records. A table below shows the upload status for three files. A red circle highlights the 'File Name' column, and a red arrow points from the text above to this column.

Start Date & Time	End Date & Time	File Name (View Errors)	Records Read from file	Loading Errors	Records Processed	Records Uploaded	Records Rejected	Total no. of Errors	Error Types	Duration
1/22/2009 1:47:03 PM	1/22/2009 1:47:04 PM	newparts_ABC.txt	1	0	1	1	0	0		0 mins & 1 secs
1/22/2009 9:29:11 AM	1/22/2009 9:29:12 AM	Newmkprc_ABC.txt	7	0	7	0	7	14	M	0 mins & 1 secs
11/13/2008 7:57:36 PM	11/13/2008 7:57:37 PM	planfmvrules_ABC.txt	1	0	0	-1	1	1	E	0 mins & 1 secs

If you have any questions, or require **FTP Upload Training**, please do not hesitate to contact EASi Customer Support at Support@easiadmin.com.

Thank you.