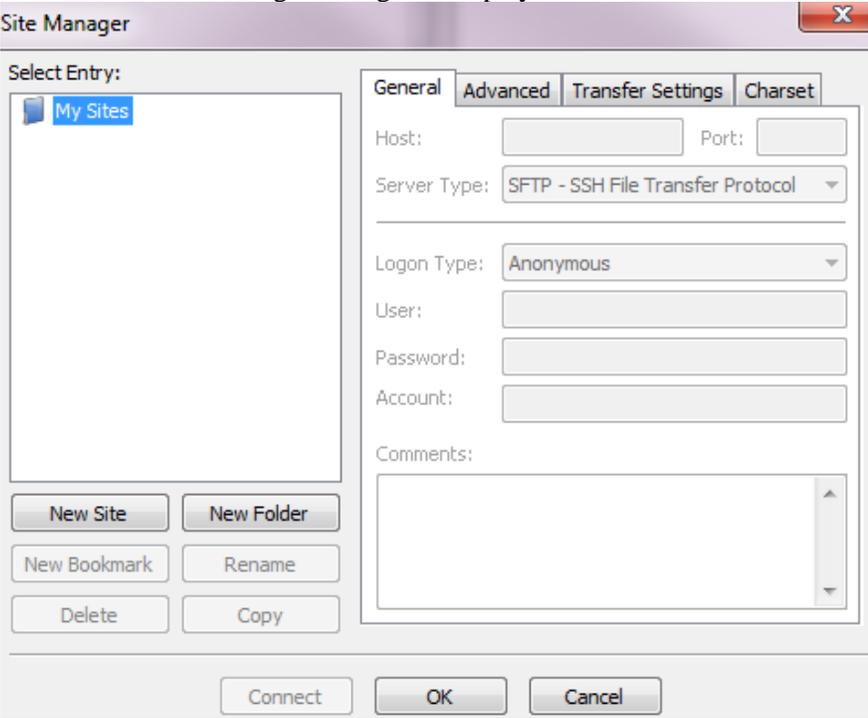
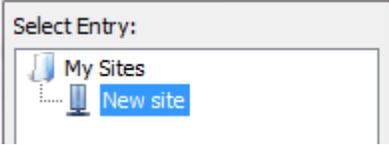
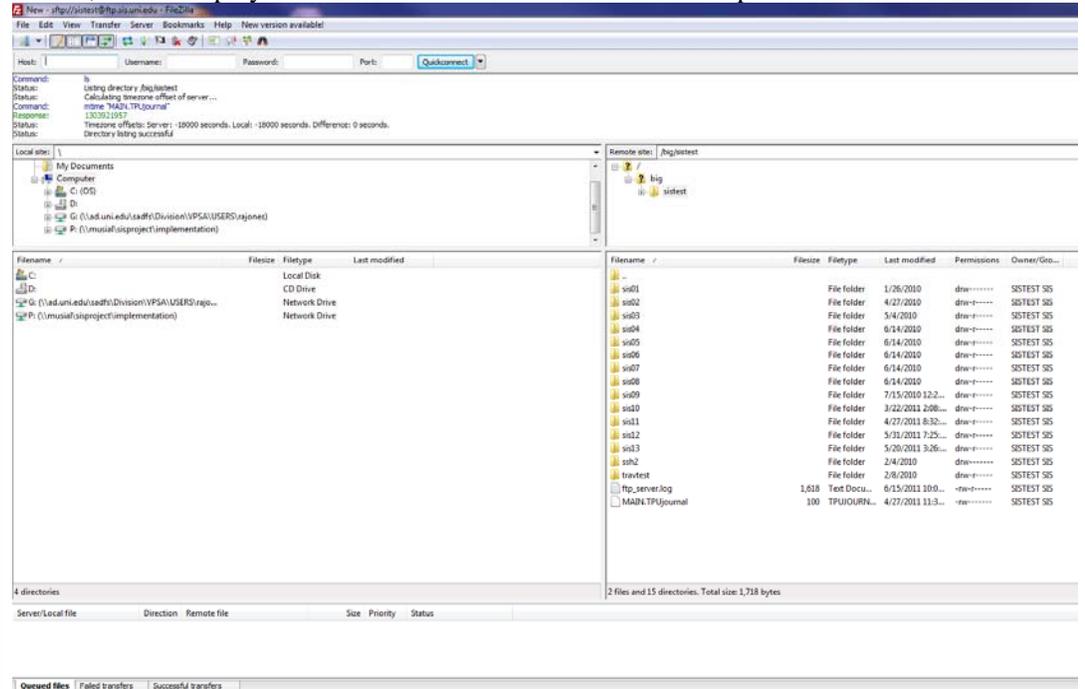


## FileZilla – FTP Process for Student Financials

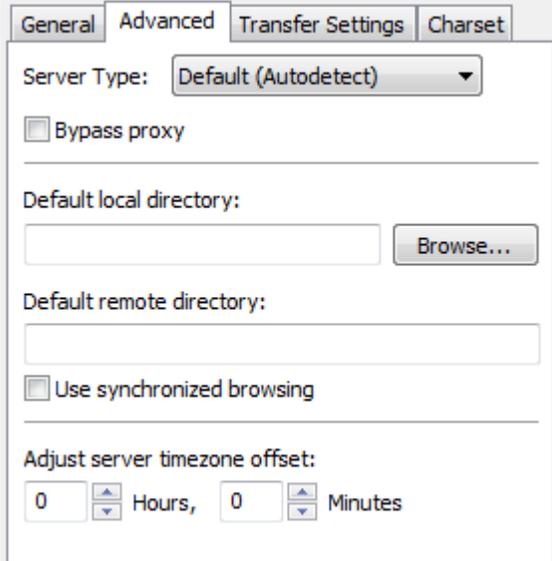
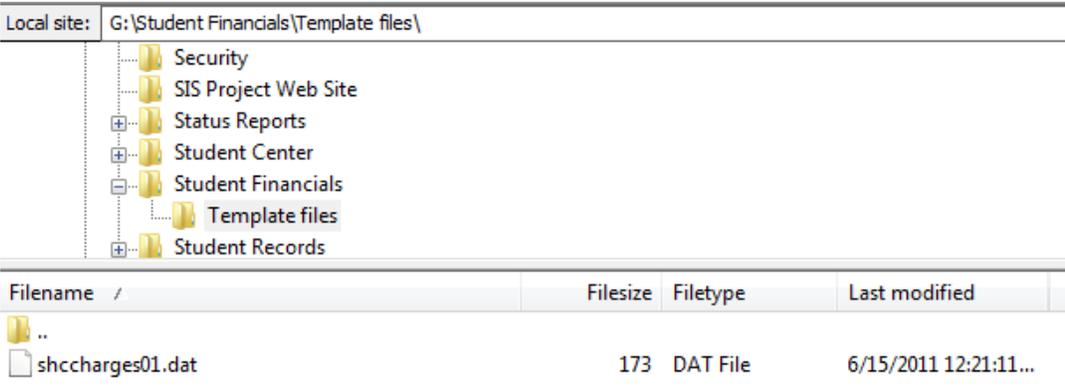
**Purpose:** Departments will use the FTP Process to post charges and credits to the customer accounts in Campus Solutions/PeopleSoft.

**Site Manager Set Up** – Complete this procedure once so that you can access the File Server.

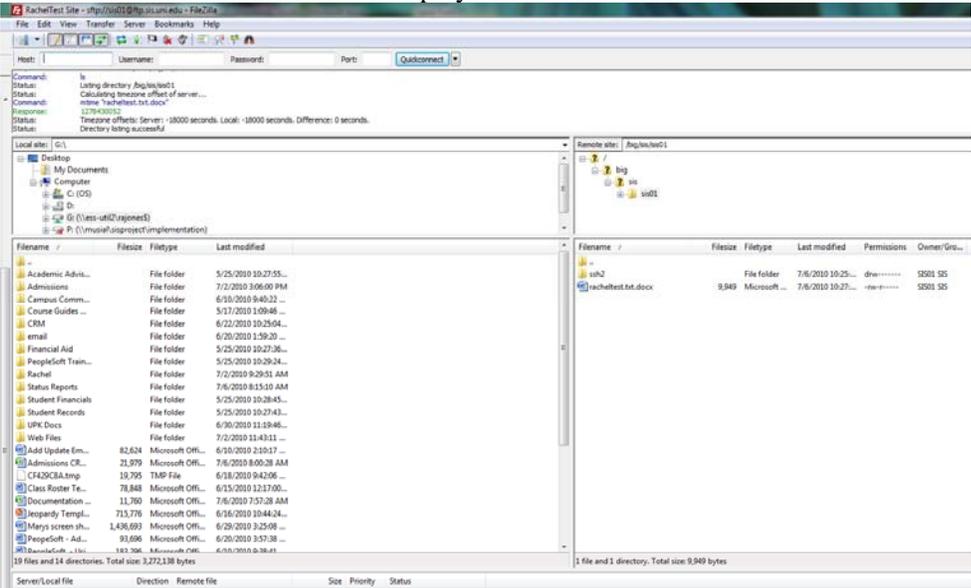
Step	Action
1.	Access FileZilla. 
2.	Select <b>File, Site Manager</b> from the menu Or Click the <b>Open Site Manager</b> button   <b>Result:</b> The Site Manager dialog box displays. 
3.	Click the <b>New Site</b> button.  <b>Result:</b> In the <b>Select Entry</b> field, a new site displays under My Sites. 

Step	Action
4.	Type a name for the new site.
5.	<p>On the General tab, complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Host</b> – Enter <b>ftp.sis.uni.edu</b></li> <li>• <b>Server Type</b> – Select <b>SFTP – SSH File Transfer Protocol</b></li> <li>• <b>Logon Type</b> – Select <b>Normal</b></li> <li>• <b>Username</b> – Enter appropriate username (For training enter: <b>sistest</b>)</li> <li>• <b>Password</b> – Enter appropriate password</li> </ul> <p><i>Note:</i> Your production username and password will be provided.</p>
6.	<p>Click the <b>Connect</b> button.</p> <p><b>Result:</b> The site has been set up and the Local/Remote sites display. If a connection error occurs, it will display in the Command/Status section at the top.</p> 

**Setting a Local Site Default** – Complete this procedure once if you are sending files from the same location so that FileZilla displays the same local directory each time. This is the location where you save your templates. For example: *G:\Student Financials\Templatefiles*

Step	Action
1.	Select <b>File, Site Manager</b> from the menu Or Click the <b>Open Site Manager</b> button 
2.	In the <b>Site Manager</b> dialog box, select the <i>Advanced</i> tab. 
3.	Click the <b>Browse</b> button next to <i>Default local directory</i> .
4.	Navigate to the desired default local directory. Click the <b>OK</b> button. Click the <b>OK</b> button in the Site Manager window.  <b>Result:</b> Once connected to the site, FileZilla displays your default local directory.  <u>Example:</u>  

**Saving/Sending Files to the FTP Server** – Complete this process every time you wish to send a file to the FTP Server so that files can be received into Campus Solutions/ PeopleSoft.

Step	Action
1.	Access FileZilla. Select <b>File, Site Manager</b> from the menu or click the <b>Open Site Manager</b> button 
2.	<p>Select your site entry, click the <b>Connect</b> button. Enter your password.</p> <p><b>Result:</b> The Local/Remote sites display.</p> 
3.	<p><b>Drag and drop</b> or <b>double-click</b> the file you wish to move from local to remote (sis04 folder for training – Penny will provide dept sites in Production) site. <b>Result:</b> Your file has been transferred.</p> <p><b>Note:</b> If the file already exists, you will be prompted to overwrite. Select <b>OK</b>.</p> 