

SOCIAL SURVEY FTP



Connecting with CyberDuck Quick Reference

Tony Mears

TABLE OF CONTENTS

SETTING UP YOUR FTP CLIENT 1
 Understanding the CyberDuck interface..... 1
 Connecting and Transferring Files with CyberDuck..... 2
 Connecting with FTP/FTPS/SFTP and uploading 2
 To connect to your Social Survey FTP account..... 3
USING BOOKMARKS WITH CYBERDUCK..... 6



Version Number	Change Description	Effective Date
1.0	Initial release	10-May-2019

SETTING UP YOUR FTP CLIENT

An FTP client is a program used to transfer files to and from an FTP server using the File Transfer Protocol. An FTP client usually has a graphical user interface with buttons and menus that help you with file transfers. However, some FTP clients are completely text-based and run from a command line.

Social Survey recommends using CyberDuck. CyberDuck is a free, open source, multi-functional FTP, SFTP, WebDAV, Amazon S3 and OpenStack Swift client for Microsoft® Windows® and Mac OS X.

Windows - <https://update.CyberDuck.io/windows/CyberDuck-Installer-6.9.4.30164.exe>

MAC oSX - <https://CyberDuck.io/appstore>

Once the download completes, run the installation using the recommended settings.

Understanding the CyberDuck interface

There are 4 basic tools or features in CyberDuck that you'll need to understand:

Folder Browser – located in the center panel and reveals local or remote files.

Open Connection – located at the top left of the interface, the open connection icon opens the site manager allowing you to create, connect and save site connections, edit site connection settings, configure advanced options and enabling or disabling.

Toolbar – located at the top of the CyberDuck interface and shows tools, actions and shortcuts used to speed up your transfer processes. You can customize your tool bar by going to “View” at the top of CyberDuck, select “Customize Toolbar...” and add or remove shortcut icons for specific tools.

Use the customize toolbar feature to simplify and quicken your file transfers.

Quick Links – located just underneath the “Open Connection” icon and allows you to jump between features such as the file browser, your bookmarks, recent site connections and CyberDuck’s WebDAV auto discovery. For more information on WebDAV with CyberDuck, click [here](#)

Connecting and Transferring Files with CyberDuck

So now that you have CyberDuck installed, the next step is to get connected and start transferring files. CyberDuck makes it super easy to get going. To connect to an FTP server, you need only to press one button!

Important - Please ensure you have received the FTP Template from your Customer Success Manager or your On-Boarding Specialist In order to properly process the FTP file. The file **MUST BE** named "**socialsurvey.csv**" It is case sensitive.

Link to download the most up-to date FTP template

<https://www.socialsurvey.com/wp-content/uploads/2019/03/SocialSurvey-FTP-Template-Nov-2018.csv>

Connecting with FTP/FTPS/SFTP and uploading

To connect to your Social Survey/Hosted FTP account, you’ll need 4 pieces of information The Information for your account will be provided to you by the Customer Success Manager or On-Boarding Specialist for your account.

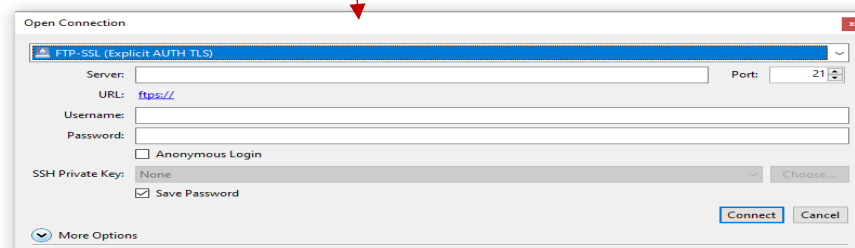
Login Example	Definition
site: 54.68.182.19	The address of Social Survey FTP Server
login: businessname	User name used for logging into FTP
password: 2fd! YJKs\$5G+6kjJ	Password for FTP account
port: 21	Port number used to connect to the FTP server

To connect to your Social Survey FTP account, follow the instructions below:

Open CyberDuck and click the Open Connection icon. This will open the folder browser window.



Select your protocol using the drop-down menu at the top of the interface. From the drop-down box select the desired connection type. Social Survey connection type is FTP-SSL (EXPLICIT AUTH-TLS)

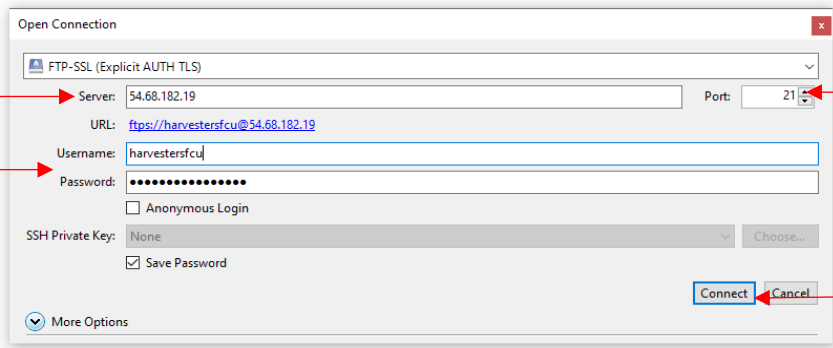


If you get a Certificate warning

Check, "Always trust this host, add this key to cache" if you want to save the host key to bypass the "unknown host key" notification in the future.

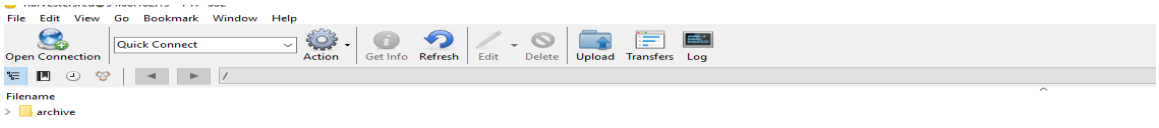
Input FTP Server address 54.68.182.19

Change to Port 21



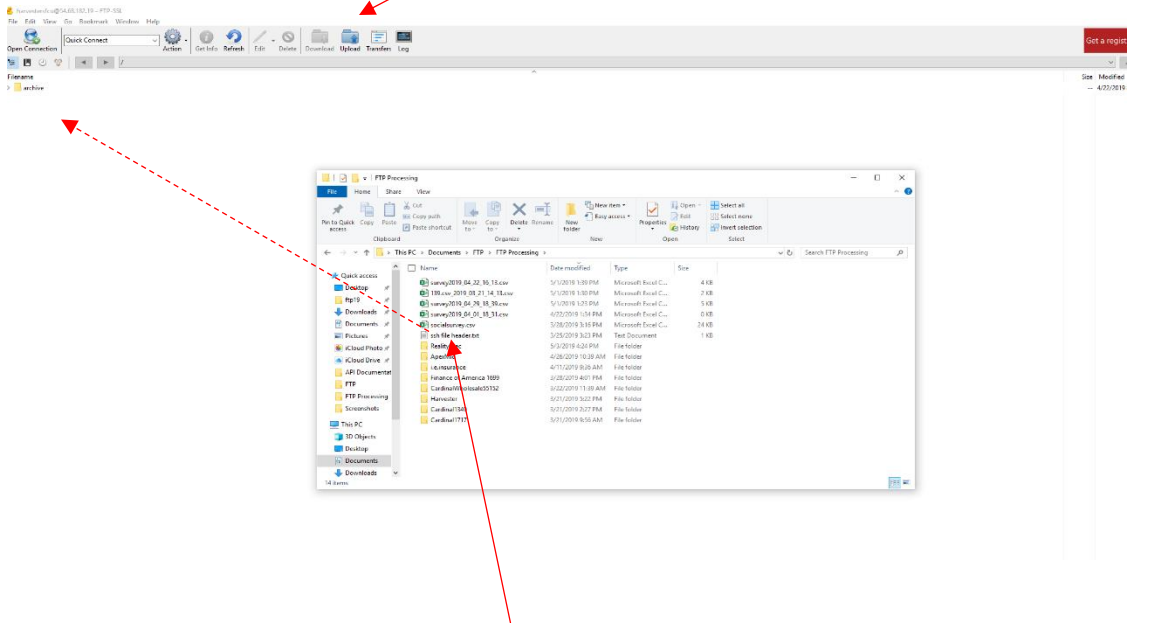
Username & password,
both case sensitive

Click "Connect" and click "Allow" to the unknown host key to gain access to your remote site.

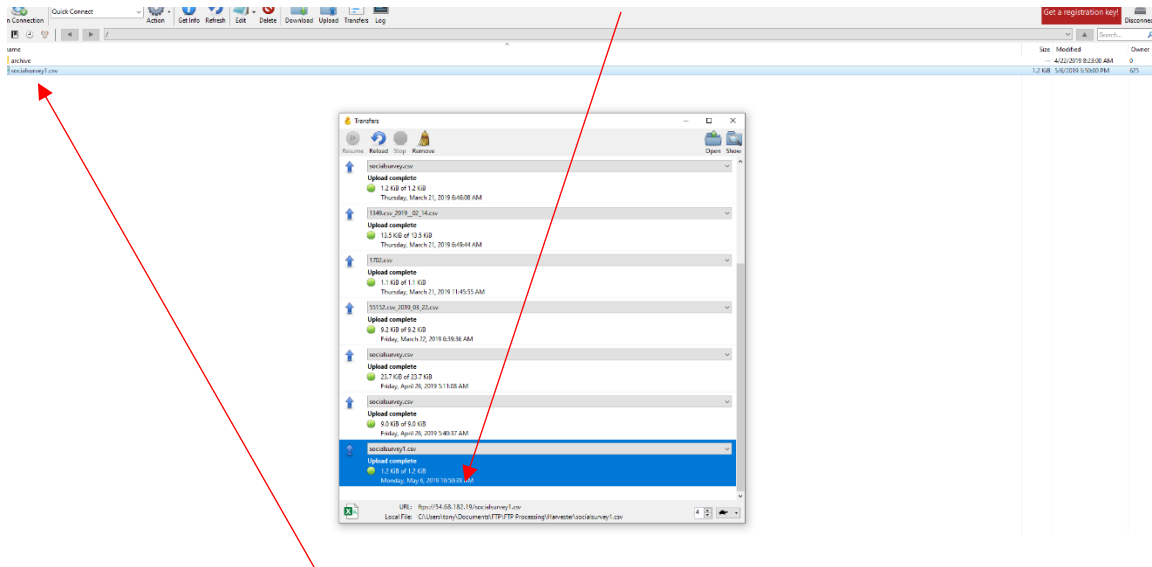


Once your connection is established, you will be in your folder and are ready to "drag and drop" your **"socialsurvey.csv"** file into the folder to be processed by the FTP server. Do not place the file into the archive folder, once the file is processed the server will store a copy processed in the archive folder.

Click the upload icon and select the file from your local directory on your computer.



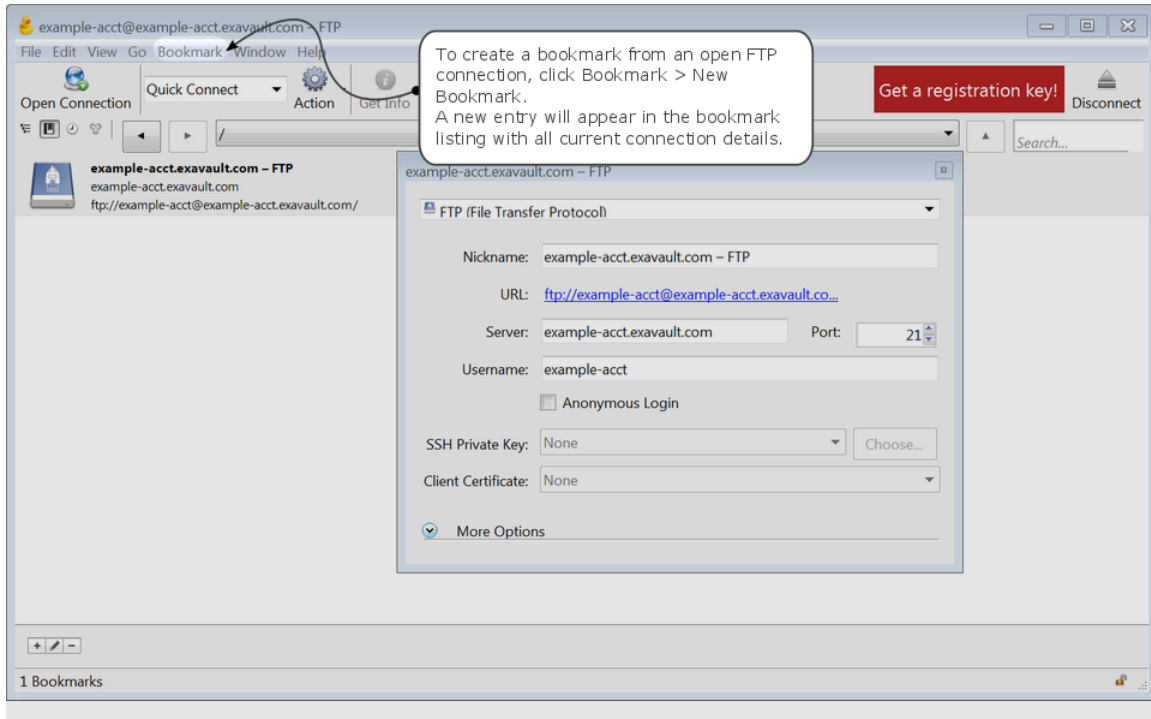
Simply select the **“socialsurvey.csv”** and “drag” the file to your FTP server folder then release the mouse button. The file transfer window will appear and show the progress of the upload. When complete you will get an Upload Completed notice.



You will see the file **“socialsurvey.csv”** is now in your folder and ready for processing. This is it !! your file is in the correct folder on the FTP server to be processed. You can now click the “Disconnect” icon to end the session.

USING BOOKMARKS WITH CYBERDUCK

Bookmarks are one of the most powerful – and easy to use – features in Cyberduck. A bookmark is just like a bookmark in a web browser: it stores the details of an FTP connection so you can easily reconnect



Once you bookmark a FTP server connection it is now saved locally on your computer. The next time you need to transfer a file just open CyberDuck and and click the boomark to login and start the process. No need to re-enter the log in credentials each time.

