Eckler Ltd. FTP Site User Guide

(File Transfer Protocol)

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4/20/2016
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Introduction
Eckler’s FTP site provides users with a secure method of transferring files between users, or groups of users. This system has a set of basic features in order to keep it “user friendly”.

To access the site, open a web browser and navigate to: https://ftp.eckler.ca

Language
French speaking users can change the language to French by selecting Français from the language link on the top right. It’s important to note, that once logged in, the language used for the site will be the one that was defined when the user was added.

Login
The login procedure is straight forward. The Username is your email address. In the case of an Eckler employee, the Password is the same as your standard Windows password. For clients, the Password should have been supplied to you by an Eckler contact. Note both items are case sensitive. Fill in both values and click on the Login button.

If you require an account please contact IT Support to create an account – it-support@eckler.ca or 416-696-3066.

Lost Password (clients only)
As a client, if you have lost your password, click on the Lost Password link. You will be prompted for your email address.
Once your email address has been submitted, a new password will be generated, and emailed to you. After your initial login, you will be required to change password. Start off by providing your current password, then using the guidelines provided, create and confirm a new password. Once you submit the form, your session will be terminated, and you will be required to log back in with your new password.
Adding Contacts
Next, you will want to add contacts to exchange files with. Setup is quick and simple, with only a few options required to control the flow of documents. The key to the user is the user’s email address, and as such, duplicates are not permitted. We recommend that lower case email addresses be used to avoid any confusion, as the login process is case sensitive.

Click on the Contacts link from the Option Bar on the top of the screen.

![Contact List]

Then Add.

![Add Contact]

A popup screen will appear prompting you for the user information.
User Name (First Last): Enter a first name and last name.

Email: Enter the email address (remember to use lowercase)

Primary Eckler Contact: Automatically filled with your name.

Additional Eckler Contacts: Allows you to add additional Eckler contacts for your client.

Groups: Use this option to assign the contact to any existing groups.

Default Contact: If for whatever reason you would like to assign a different Eckler user as the primary contact, select it from the list. The Default Contact, is the name of the user that is selected by default, when uploading a file.

Language: Two languages are available - English and French.

Upload OK? : Check this box if the user will be allowed to upload files to you.

Download OK? : Check if the user will be allowed to download files from you.

Email on Login? : Check if you would like to receive an email every time the user logs in.

Email on Upload/Download? : Check if you would like to receive an email every time the user uploads or Downloads a file.

Public: Check if you would like to allow all Eckler staff to also exchange files with this new user.
Fill in the fields, and click on submit. If the user’s email address already exists, an error will be returned. Otherwise the user will be added to the system, and you (not the user) will receive an email with the connection details. It is up to you to forward this information to the new user.

**Uploading Files**

Now that you have someone to exchange files with, let’s review the upload process. Select **Upload** from the option bar.

![File listing](image.png)

The following appears:

![File listing](image.png)

Click on the **Browse** button, and a standard Windows file chooser appears. Navigate to the desired directory and select a file by clicking on it. You may select multiple files, using Control Click. Once done, click on the **Open** button, and a form resembling the following should appear. A file listing appears, allowing you to enter any optional descriptions for the files.
Depending on the number of files you have selected, the screens will vary. For a single file, select Next:

Or for multiple files, you have two choices:
If you would like to combine several files, into a single zip file, select **Upload As A Single Zip File**. This will setup a single file for download by your contacts. If you select **Upload These Files**, each of the files will be uploaded and appears in the list of files that you contacts view. It should be noted that **Upload As A Single Zip File**, will naturally not keep the optional File Descriptions.

In each case, once the button has been clicked, the following screen appears.

If the client has been assigned a default contact, it will appear in the **Select Contacts box**. To change or add more contacts, simply click in the box, and a drop down of contacts will appear. You can optionally type the contacts name.
It’s worth noting that only the contacts and groups assigned to this user, will appear in this list. Eckler users will additionally see all other Eckler users, who currently have an FTP account.

On the right, the **Email on Download** option allows you to request an email when the file has been downloaded by one of the selected contacts.

Also on the right, the **Remove Options**. By default all files will be removed from the site after a period of 30 days. This option maybe change to 60 days, or **On Download**. On Download is not recommended for uploads to multiple contacts, as the file will be removed after the first download.

When at least one contact has been selected, the **Upload** button appears on the bottom right. Click the button to start the upload process.
An **Upload In Progress** message will appear.

Once the file is uploaded you will be returned to the **My Files page**.
An email will be sent to the person receiving the file to inform them of an available file. Simply click on the link and enter your login credentials to download the file.

**Eckler FTP Upload: NotePadShortcuts.txt**

Eckler FTP <ftp@eckler.ca>

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 4/14/2016 1:03 PM
To: Robert Gervais

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**Upload: NotePadShortcuts.txt**

The following file has been uploaded to you by: Robert Gervais

To download it, click here: NotePadShortcuts.txt
My Files

The My Files screen is the screen that you will arrive at when you login. It simply displays a list of all files that you have added, or have been uploaded to you.

The files appear in a standard “web” table, and as such, a few options are available.

- Columns are sortable, by clicking on the column name
- The entire table is searchable, by using the Search located on the bottom right
- If more than a screen full of files are available, you can either elect to display more than the 20 standard file names, or scroll back and forth using the Previous and Next buttons.
- You can also select all files, using the check box in the header.

Clicking on the file name does one of two things:

- If the file was uploaded by you, the file details are displayed. At this point you have the option of changing the description, adding or changing the contacts, or even deleting the file. In the case of a file deletion, you must change the drop down to Yes, Delete This File and Click the Submit button.
If the file was uploaded to you, a download of the file will begin.

You can select multiple files for download, by checking several boxes located next to each file, then selecting **Action** then **Download** from the option bar. A prompt will appear to confirm your choice.

You can delete multiple files in the same fashion, but you must be the owner of the files in question.
Groups
You can define a group of users, allowing you to upload a single file, to several users at once.

To add a new group, select Groups from the option bar, then Add.

Enter a descriptive name for the group, then add the group members by selecting their names from the list of contacts.

The check box Allow users to delete uploads from group member inboxes? requires a little explanation. When a file is uploaded to a group, it is made available to all users in the group. In some cases, once the file has been downloaded by someone it the group, it is desirable to remove the file from the ftp site. In order to enable that functionality, we check this option.

Once done, click Submit, and the group will be added.
Changing Contacts and Groups

At any time you can change any contacts or groups that you have defined, by selecting either from the Option Bar, then selecting Change, then choosing a value from the drop down list. The screens are identical to those when adding. Note, when a user / group / or file has been changed, a popup will be displayed after the submit button has been pressed, informing you of the change.

We’re Done

We’ve covered the basics of Eckler’s Ltd FTP site.

We encourage users to logout using Logout from the option bar, rather than just closing the browser. This will ensure that your session is destroyed.
Technical Support

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