COMPanion FTP Service

⚠️ this page has been moved to https://support.goalexandria.com/operations/import/#ftpservice

File Transfer Protocol (FTP) is a standard network protocol used for the transfer of computer files between a client and server on a computer network. In other words, scheduling a patron import from an FTP server is another way to automatically update patron information in your library. Use it in conjunction with GG4L or Clever to update information that might not be included in those syncs. FTPS is similar, except your data is encrypted and secure.

With this service, you'll be provided with a secure and private folder on COMPanion's FTP server. You can then upload files to that folder and transfer them to Alexandria through a patron import.

⚠️ **We only allow explicit FTPS transfers.**

Explicit FTPS is a newer transfer method that allows for more flexibility in determining how secure the file is. Before a transfer starts, the client requests encryption information to see which data is secured. However, implicit FTPS encrypts all data and establishes a secure connection before the transfer.

| Overview | Settings | Schedule | Notification | **File Source** |

Alexandria can import new (or update existing) records from a record database stored on an FTP server. These options allow you to specify the (secure) FTP server URL and username/password credentials.

Protocol	FTPS ▼
Host	[ ] Test FTP Connection
Port	990
Path	[ ]
Username	[ ]
Password	••••
	Field Mapping
	☐ Delete File(s) after Processing

Run

✓ Read about Patron Imports Best Practices!

Onboarding Process

Want access to COMPanion's FTP server? Here's what you'll need to do!

1. If you don't already have a SIS Integration package,

   contact our Sales Team to add one to your library.

2. Call Customer Support and they will send you a link to set up a username and password.

3. Once this has been completed, our Hosting Team will create a folder on our FTP server for you. We will send an email with a link to your folder.

4. You'll then need to work with your library or district tech to upload patron import files. Since we do not work directly with your SIS, this isn't within our area of support. It will be up to you and your district to get the files in the correct format to your hosted folder.

   Check out Import Field Mapping and Import Tab-Delimited Records for information on Alexandria's file formatting requirements.

5. Once the file is in your folder, you can set up and schedule an FTP or FTPS import in Alexandria.