CODYSOFT®

CODY®
CONSULTING

Secure File Transfer Protocol (SFTP)
User Guide

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CodySoft®'Secure File Transfer Protocol (SFTP) is a quick, easy, and safe and secure way to transfer files. This guide provides you with step-by-step instructions for how to upload and download files in SFTP, and how to manage your directories for these purposes.

Accessibility

Your system administrator works with CodySoft to establish user roles and responsibilities. Depending on your role, you may not have access to some of the functions documented in this guide. If you are unsure of your user role, please check with your system administrator.

After you are added as a user of SFTP, a temporary password is emailed to you for your initial login to the system.

Logging in for the first time:

CodySoft® sends you a confirmation email when you are first added to the list of registered users at the start of a project.

1. From the confirmation email, https://sftp.codyconsulting.com
2. The log-in fields appear.

3. Enter the **user name** you were assigned by the administrator
4. Enter the **password** from the confirmation email.
5. Click **Log In**

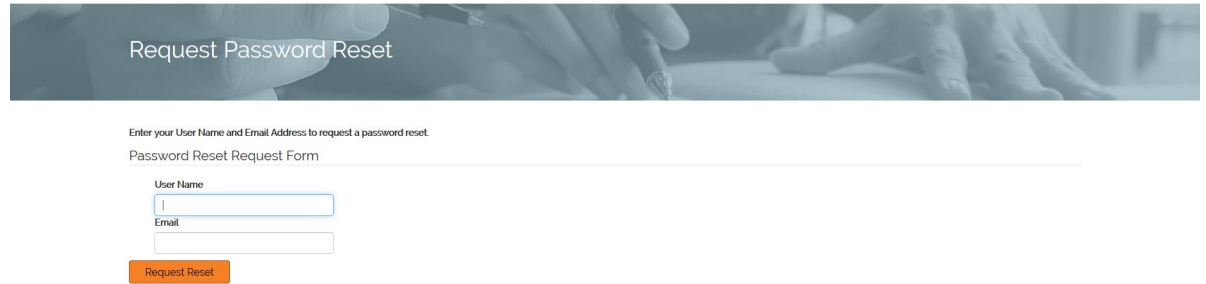**NOTE:** If you enter an invalid user name or password, you will receive an error message:

Invalid user name or password Attempt 1 of 5. You have 4 attempts remaining before you will be locked out of this account.

Please contact your system administrator if you get locked out of the SFTP application.

Reset Password

From the login screen, you can reset your password at any time:

1. Click **Reset password.** The request Password Reset dialog displays:

2. Enter your **user name**
3. Enter your **email address**
4. Click **Request Reset**
5. Follow the instructions in the email you receive to reset your password

SFTP Overview

You can access the SFTP site directly through a browser and internet connection. The transfer is fully encrypted, simple, secure, and flexible. Browser-based file transfers make it easy for you to upload and download files.
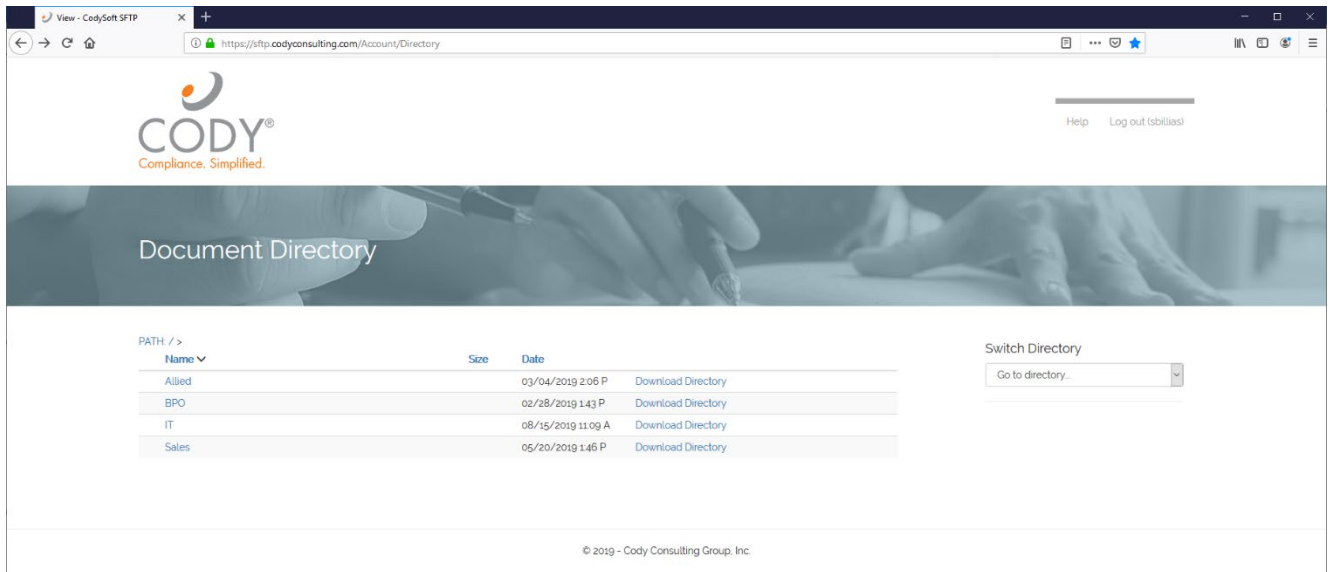SFTP has four areas of functionality:

- **Download or Delete Files and Directories**
- **Switch Directory**
- **Upload**
- **Create New Directory**

Download or Delete Files and Directories

Use the list of available file locations in the Path area to download files from the file locations displayed.

Top Level Directories

At the highest level, the directories are available for download only. You cannot delete directories to which you are assigned.

1. Click **Download Directory** on a row to download the entire directory. The standard Download dialog box opens:
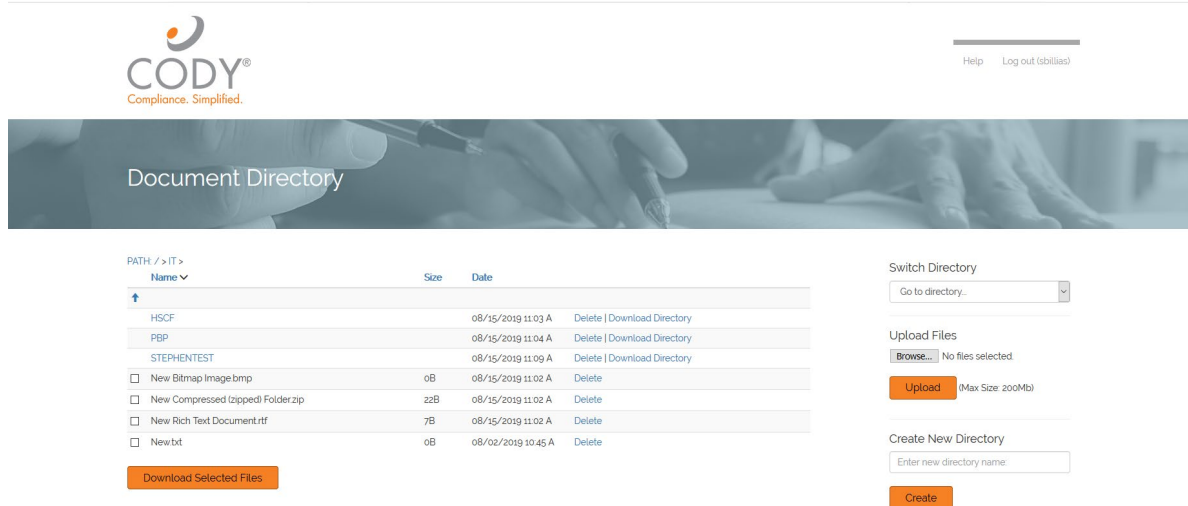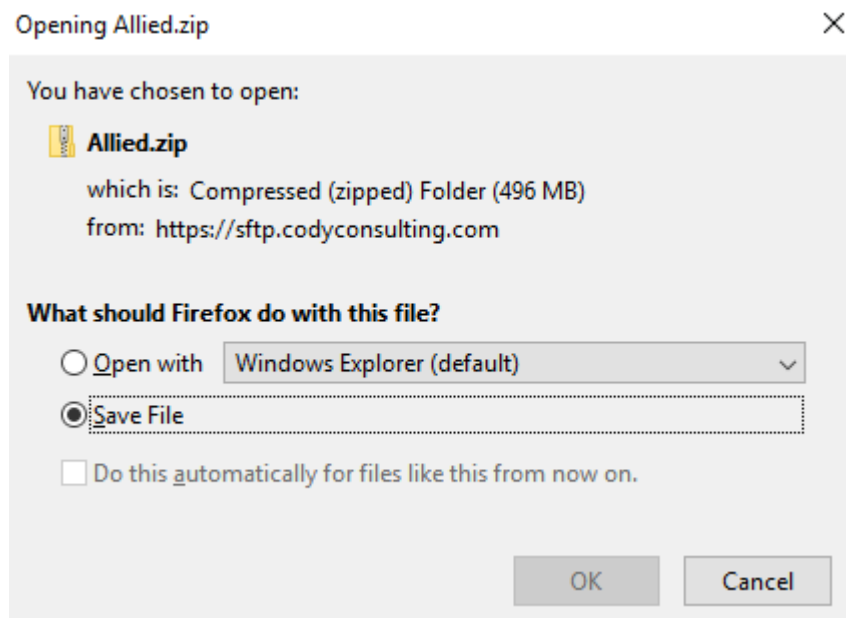

2. Select the appropriate radio button to open the file or save it.
3. Click **OK**.

Subdirectories

When you access a folder beneath the top level, you have additional choices for working with files and directories.

1. Click the **Name** on a row in the Name column to access the directory structure and download subdirectories or specific files.
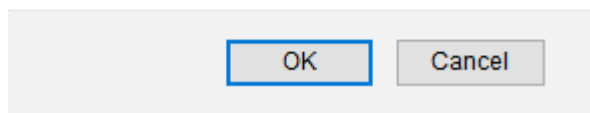

To Delete a Directory:

1. Click **Delete** on a row to remove an entire directory from the list. A confirmation message is displayed:

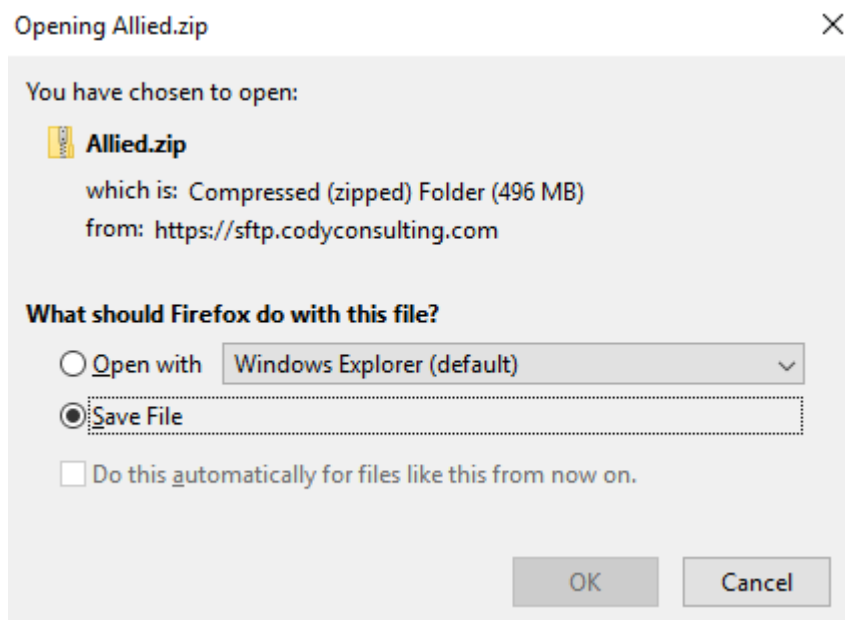2. Click **OK**. The row is removed from the list of available file locations.

To Download a Directory:

1. Click **Download Directory** on a row to download the entire directory. The standard Download dialog box opens:


2. Select the appropriate radio button to open the file or save it.
3. Click **OK**.

To Download Individual Files

1. Select the checkboxes for the flies you want to download.
2. Click **Download Selected Files**. The standard download dialog displays and you can open or save the zip fie containing the selected files.

To Delete a File

1. Click **Delete** on any row that is a file, as denoted by the checkbox at the beginning of the row. A confirmation message displays:
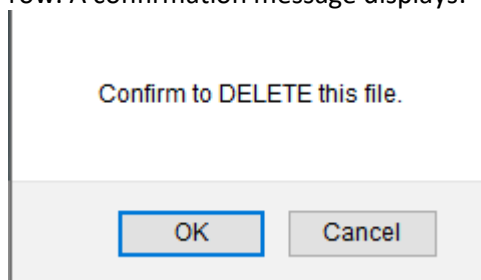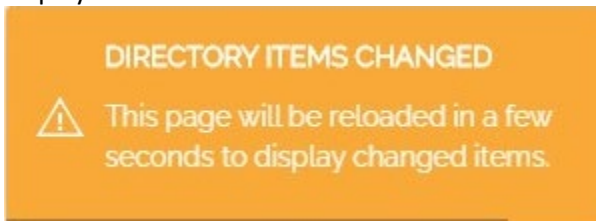

2. Click **OK** to delete the file.

Switch Directory

1. Select a new directory from the dropdown list to change to another directory:
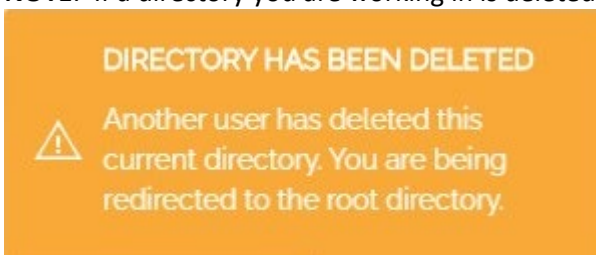
NOTE: If another user or a backend process changes a directory you are working in, a warning displays:

DIRECTORY ITEMS CHANGED

⚠ This page will be reloaded in a few seconds to display changed items.

Wait until the changed items display before continuing your work.
NOTE: If a directory you are working in is deleted, the following message is displayed:

DIRECTORY HAS BEEN DELETED

⚠ Another user has deleted this current directory. You are being redirected to the root directory.

Wait until you are redirected to the root directory before continuing your work.

Upload

To upload files for SFTP:
1. Click **Browse…** to select files for upload to the transfer site
2. Navigate to the desired folder
3. Select a file or files for upload
4. Click **Open**.
5. Click **Upload**.

The files are uploaded to the directory you are in.

Create Directory

If you have the proper permissions, you can create new directories. If you are unsure of your permissions, check with your system administrator.
To create a new directory:
1. Enter a new directory name. Use your company's naming conventions.

Create New Directory

Enter new directory name:

Create

2. Click **Create**

Your new directory is added to the dropdown list in Switch Directory.

Support

In the Support Portal, CodySoft® provides several ways to get more information about how to use the CodySoft product.

1. From any screen in CodySoft, click **Help** in the upper right corner of the screen to enter the Support Portal. The Support Portal home screen displays:
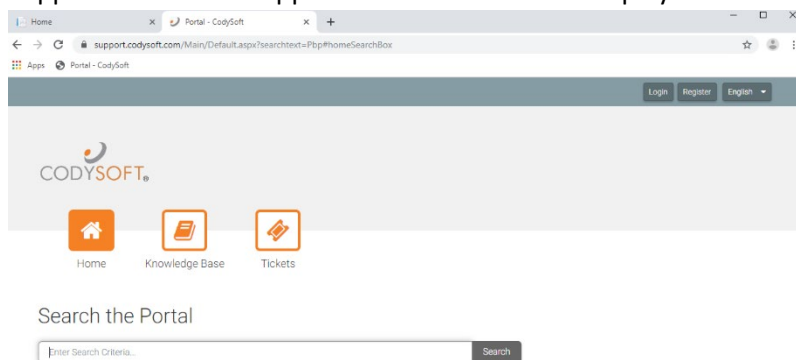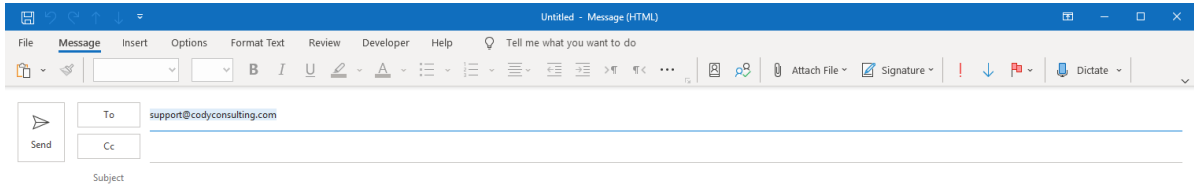

2. From the Support Portal home screen you have three choices:
   a. Knowledge Base
   b. Tickets
   c. Search the Portal

Using the Knowledge Base

1. Click **Knowledge Base** to enter the Knowledge Base
   a. Enter a Search term
   b. Click Search to look for topics related to your search criteria. The system displays a list of relevant Knowledge Base topics.
   c. The Knowledge Base choice provides links to user guide documents on many CODY modules, including a set of videos on how to accomplish basic CodySoft Collateral Management (CM) tasks

Open a Ticket

1. Click **Tickets** to enter a new support ticket:
2. Click **Start Ticket**. An email opens addressed to Cody Support:

3. Fill out the email, providing as much information as possible for each requested item:
   a. Description
   b. Module
   c. Project/Template
   d. Browser
   e. Attached screenshot or video

4. Click **Send.** After you submit the email you will receive an email with a ticket number acknowledging receipt; please do not reply to this email. A member from the support team will contact you within the defined Service Level Agreement (SLA) between CODY and your organization.

Search the Portal

You can search the Support portal, including the Knowledge Base for information.

1. Enter search criteria, for example "PBP."

2. Click **Search**. Any items related to your search appear below the Search bar, with live links to the information.

Search the Portal

| pbp | Search |

Knowledge Base

PBP Module User Guide
PBP Module Reference Materials