



StudentInformation – Management – District Administration – Vendor Extract Report Config

Before you can transfer files created by **Report Designer** through FTP or SFTP, you must set up the credentials for accessing the server on the **Vendor Extract Report Config** screen. The server should already be set up for (S)FTP and you should have the credentials on hand.

1 With a district in context on the **Vendor Extract Report Config** screen, click **Add Configuration**.

StudentInformation > Management > District Administration > Vendor Extract Report Config

Vendor Extract Report Config

	Report Name	Host	Port	Protocol Type	Username	Remote Directory	Remote Filename
	Vendor Extract\Clever - Admins	test.software-answers.com	21	Ftp	test	reports	abctest.txt
	Vendor Extract\Clever - Sections	test.software-answers.com	22	Sftp	test	reports	test.txt

The **Vendor Extract Report Config** screen has standard add record, edit record, and delete record controls. You can save a configuration even if the connection cannot be established and return later to edit the configuration with the correct credentials.

The **Add Configuration** window opens.

Add Configuration

Report Name

Host

Port

Protocol

Encryption

Username

Password

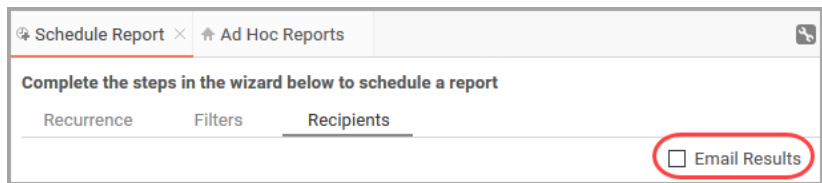
Remote Directory

Remote Filename



Reporting

The reports set up for (S)FTP must have the **Email Results** checkbox deselected on the **Schedule Report** tab **Recipients** subtab.



- 2 Enter the appropriate credentials in the fields.
 - **Report Name** – Select a report that has the **Is_Vendor_Extract** checkbox selected.

Note: Only reports with the Is_Vendor_Extract checkbox selected display in this list. If there are no reports with Is_Vendor_Extract selected, nothing displays.
 - **Host** (required) – Enter the name of the host.
 - **Port** (required) – Enter the port number.
 - **Protocol** – Select SFTP or FTP.
 - **Encryption** (displays only if you select FTP) – Select the type of encryption to use.
 - **Username** (required) – Enter the username for the FTP server.
 - **Password** (required) – Enter the password for the FTP server.
 - **Remote Directory** – Enter the remote directory to which the transfer file is sent.
 - **Remote Filename** – Enter the remote file name that displays after the transfer completes.

3 Click **Test Connection** to verify that the credentials are accurate. If you receive an error message, ensure the credentials you have are correct and entered correctly.

4 Click **Save Configuration**.
A confirmation message displays, and the new configuration is added to the grid.

StudentInformation > Management > District Administration > Vendor Extract Report Config

[Find Students] [Go To]

Vendor Extract Report Config

+ Add Configuration

Success! The configuration was Successfully Saved.

	Report Name	Host	Port	Protocol Type	Username	Remote Directory	Remote Filename
	Vendor Extract\Clever - Admins	test.software-answers.com	21	Ftp	test	reports	abctest.txt

You can now run the corresponding reports, which automatically transfer via (S)FTP.