



# Setup Guide for PLEXIS SFTP: WinSCP and FileZilla

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## Contact Client Support

PLEXIS Healthcare Systems, Inc. Client Support Department

Phone: +1 (877) 475-3947

6:00 a.m. - 5:00 p.m. PST, Monday through Friday

Email: [ClientSupport@plexishealth.com](mailto:ClientSupport@plexishealth.com)

Internet: <https://www.plexishealth.com/support/>

Please be prepared to provide the following information:

- The version of the **PLEXIS** Product you use
- The exact wording of any messages that appeared on your screen (if possible, take a screen shot of any message you received and send it via email)
- A description of what you were doing when the problem occurred and what happened
- Whether the problem can be repeated
- A description of any actions taken to correct the problem

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## Introduction

To transfer files, PLEXIS recommends you use the WinSCP or the FileZilla FTP file transfer programs. These are free SFTP applications. PLEXIS has tested these utilities and found them to be the most stable solutions for quick file transfers and minimal download interruptions.

They are available for download at:

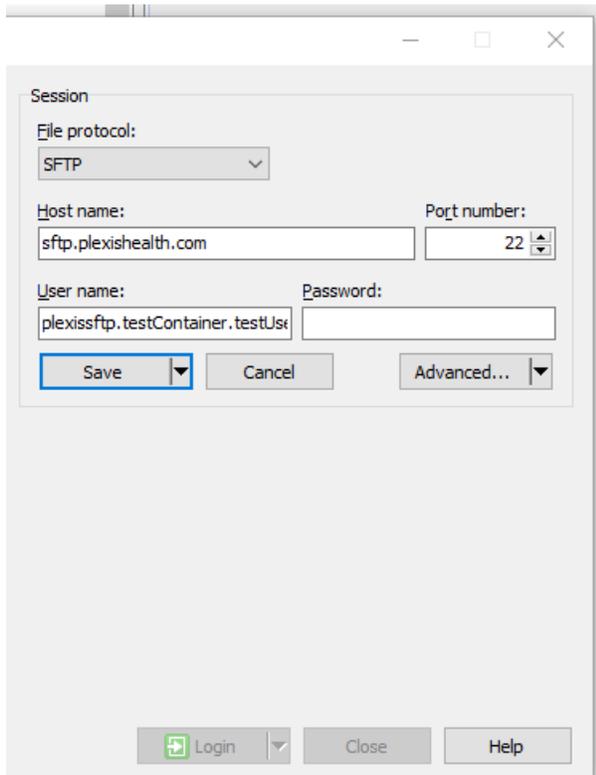
<https://winscp.net/eng/download.php>

<https://filezilla-project.org/download.php?type=client>

## WinSCP Setup instructions to connect to PLEXIS SFTP

To setup a connection to PLEXIS with WinSCP:

1. Select the pull down for File Protocol and choose **SFTP**.
2. You will receive a full URL from PLEXIS. The URL will look something like this:
  - a. `plexissftp.testContainer.testUser@sftp.plexishealth.com`
3. Copy the full URL into the Host name field in WinSCP. It will break it apart into separate pieces.

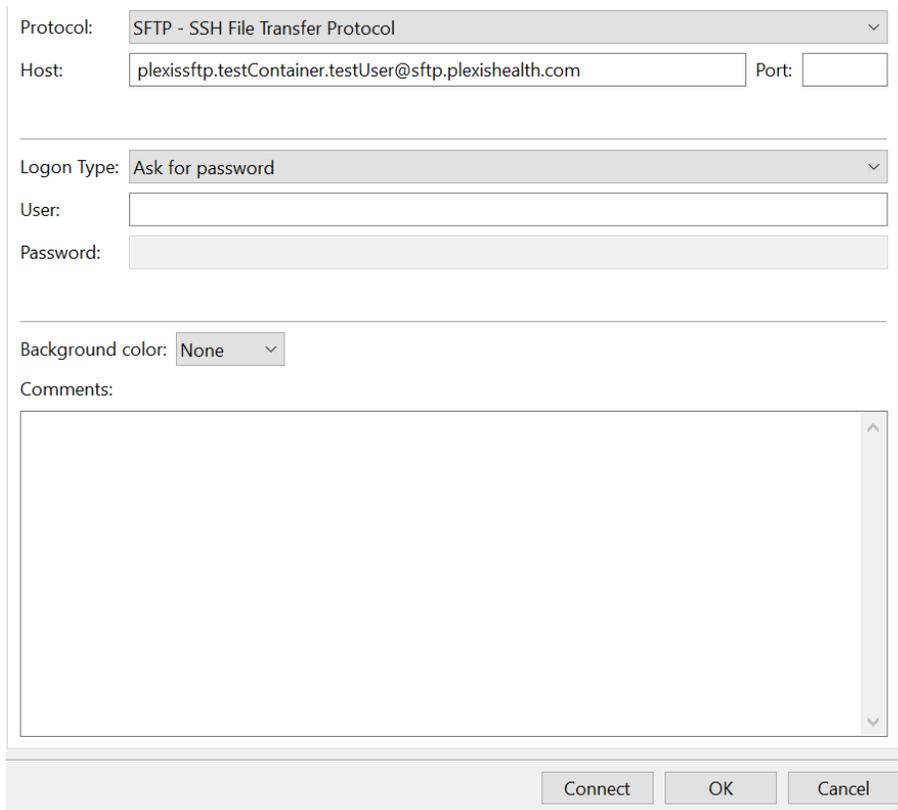


4. Change the File Protocol to SFTP. Leave the port at 22.
5. You may save the login via the Save button, if desired.
6. Hit Login.
7. You will be prompted for the password. Input the password PLEXIS has delivered to you.
8. You may receive a certificate notice. Hit Yes.

## FileZilla Setup instructions to connect to PLEXIS SFTP

To setup a connection to PLEXIS with FileZilla:

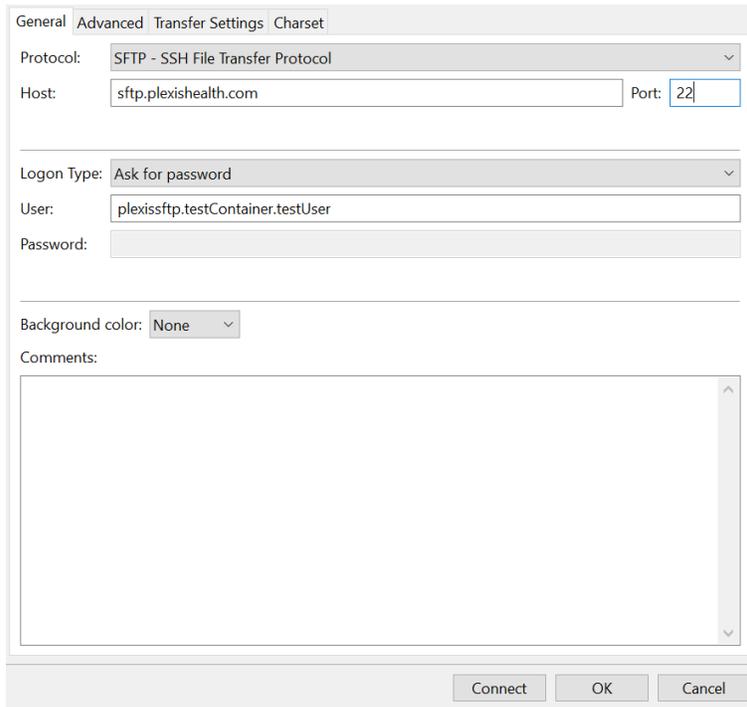
1. Open the Site Manager via the File menu.
2. You will receive a full URL from PLEXIS. The URL will look something like this:
  - a. `plexissftp.testContainer.testUser@sftp.plexishealth.com`
3. Copy and paste the the URL into the Host field like so:



The screenshot shows the FileZilla Site Manager dialog box. The 'Protocol' dropdown is set to 'SFTP - SSH File Transfer Protocol'. The 'Host' field contains the URL 'plexissftp.testContainer.testUser@sftp.plexishealth.com'. The 'Port' field is empty. The 'Logon Type' dropdown is set to 'Ask for password'. The 'User' and 'Password' fields are empty. The 'Background color' dropdown is set to 'None'. The 'Comments' field is empty. At the bottom, there are three buttons: 'Connect', 'OK', and 'Cancel'.

4. Change the Protocol to SFTP.
5. Change the Port to 22.
6. Select Logon Type Ask for password
7. Click OK

8. FileZilla should split the URL into the host and user, as you can see below:



The screenshot shows the FileZilla 'General' tab configuration. The 'Protocol' is set to 'SFTP - SSH File Transfer Protocol'. The 'Host' field contains 'sftp.plexishealth.com' and the 'Port' field contains '22'. The 'Logon Type' is set to 'Ask for password'. The 'User' field contains 'plexisftp.testContainer.testUser' and the 'Password' field is empty. The 'Background color' is set to 'None'. There is a large empty 'Comments' text area. At the bottom, there are 'Connect', 'OK', and 'Cancel' buttons.

9. You may receive a certificate warning; you can hit Yes or Accept.

(End of Setup Guide for PLEXIS SFTP: WinSCP and FileZilla)

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