
MFT FAQ for Summon and 360/Intota Clients

- **Product:** Cross Product
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Note

For all groups, your FTP accounts will be deactivated on August 31, 2023 to complete the move to MFT.

FAQs

1. What is happening?

The Summon, 360, and Intota teams will begin using an MFT (Managed File Transfer) platform instead of FTP (File Transfer Protocol) clients for transferring data. FTP will no longer be supported for exchanging data/files.

2. Why is this change occurring?

[MFT](#) is more a secure and reliable technology than FTP, and Ex Libris is adopting this approach across all product lines.

3. How does this impact Summon clients?

Summon clients that send local collection updates to Summon (e.g. catalogs, repositories, and study guides) will need to use the new MFT platform rather than the current FTP workflows.

4. How does this impact 360/Intota clients?

If you are a 360 MARC Update client, your records will be delivered via MFT, and there will be a new procedure for accessing and downloading the records and reports.

5. When is this happening?

There will be a phased migration of existing clients beginning in November 2022 and ending mid-2023. **There will be four migration groups.** Notifications to each migration group will be sent from Customer Support one month prior to migration, with additional reminders 2 weeks prior and then 1 week prior to the switch.

6. What do I need to know about the migration?

Depending on your group, you will receive a personalized message **on November 1, January 9, March 1, or July (date TBD)**. This message will include details about how to access the MFT platform and your library's credentials for logging in.

7. Are there technical details to communicate to IT?

Yes. Port 10022 must be open for outgoing traffic on the relevant server and/or workstation. SFTP is the only supported protocol, and login will require a **username** and **SSH key** only—no passwords. The username and directions for obtaining your SSH key will be sent in the message described immediately above. In addition, make

sure your network can reach the following IPs: **216.147.208.23** and **216.147.212.33**.

8. Can I automate file transfers with the MFT platform?

Yes, but it depends on the tool that you're using, which must support the following:

- SFTP
- Authentication with a key (instead of a password). For example, WinSCP offers this as an advanced option.

9. Will the migration affect scheduled holdings reports sent from 360/Intota by FTP to third-party vendors such as Third Iron (Browzine)?

No, these files can continue to be delivered over regular FTP, or they can optionally be switched to MFT if the third-party vendor supports SFTP with key-based authentication.

10. If I have old records and reports files from 360 MARC Updates on the FTP server, will they be migrated to the MFT platform?

No. If there are files you haven't downloaded, or if you want to retain old files for archival reasons, you must download them from the FTP server. They will not be available on the MFT site.

11. Is there a change to the data retention policy for 360 MARC Updates?

Yes. After the migration to the MFT platform, the records and reports files will only be available for 6 months. After that time has passed, the files are deleted and no longer available for download.

12. When will Sierra/Summon clients migrate to the MFT platform?

Sierra/Summon clients will be part of the fourth migration group, tentatively scheduled for July 2023. If you are a Sierra client and have been contacted for migration group 1, 2, or 3, please contact Support so that you can be moved to group 4.

13. Is there a size limit for upload files on the MFT Server?

No, there is no limit for Summon and 360 MARC update upload files.

14. My library uses Summon over Alma. Do I need to do anything for this migration?

No. Because Summon over Alma uses an internal transfer, your library will not participate in the MFT migration.

15. Where can I get information on how to access the MFT server?

See [Ex Libris Cloud MFT User Guide for Summon and 360 Services](#).

16. What if my key does not work, or I get a message about an invalid key?

The key used to log on to our server is refreshed monthly and may have been overwritten if it wasn't used during the month that it was originally issued. Please contact Support to request a new key to fix this issue.

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