How to Configure your SFTP to Receive Data Feeds

Getting Started

CSRconnect Client Admin Panel, Data Hub. **NOTE:** Data feeds must be activated by your Account Manager and you must have permissions to 'Download Data Feeds' and 'Configure Data Feeds' before you may proceed.

- Visit the YourCause CSRconnect Client Admin Panel > Report > Data Hub
- Click on the 'Data Feeds' Tab
- Click on the 'Edit SFTP Configurations' link, this will open a panel where you can manage your SFTP settings

- Click on 'Add SFTP Setting'

Configure SFTP Settings

With this feature, you can configure as many SFTP settings as needed to properly manage data feeds with your team. For example, you can deliver the Pledge Data Feed to one SFTP and the Volunteer + Employee Data feed to another SFTP.

1. **Name***: Customized nickname for the SFTP set up that is not a unique identifier. This will show in the Client Admin Panel > Data Feeds > Edit SFTP Settings
2. **URL*:** (ex: sftp1.your-cause.com)
3. **Path*:** The specific location of the file (ex: /users/qatest1/DataFeed).
4. **Username*:** The character used for login.
5. **Port*:** SFTP server port number unique for each company (usually 22).
6. **Password:** Password used for login (required if no SSH Key, can be combined with SSH Key)
7. **Passphrase:** Customized passphrase used for login (not required)
8. **SSH Key Upload:** File provided by system administrator used as the password for login (required if no password, can be combined with password)
9. **PGP Public Key*:** The key to encrypt file with PGP encryption.

The different combinations for authentication available are:
1. Just Password
2. Just SSH Key
3. Password with Passphrase
4. Password with SSH Key
5. Password with SSH Key and Passphrase

NOTES:
- Once your SFTP location has been configured, the changes will take effect with the next nightly data feed delivery.
- All data feeds delivered to a client's SFTP location will be PGP encrypted.

After you have configured your SFTP/s you can finalize your settings.

- From the SFTP Settings panel, click on 'Report Location Settings'
- Select and save the Data Feed names that should be delivered to this SFTP

Notification Settings

For each SFTP configured, you can configure email communications to be delivered to a key Admin. There are three system emails that are sent to this Admin in regard to the SFTP connection and transmission for the selected Data Feeds in that SFTP:

- **SFTP Server Upload Success:** This email lets the Admin know their data feed/s were successfully delivered to the expected SFTP.
- **SFTP Server Connection Failed:** Could not connect to the SFTP.
    - There are several reasons why a connection can fail. Please try these troubleshooting steps before contacting your Account Manager:
        - Visit the SFTP Panel and follow the steps to 'retry' the transfer
        - Check your connection settings and make sure you have the correct password/key
        - Confirm your system has not blocked our IP address
- **SFTP Server Upload Failed:** The upload failed, and the data feed did not get uploaded into the SFTP.
    - If received, please contact your Account Manager to request Engineering support.
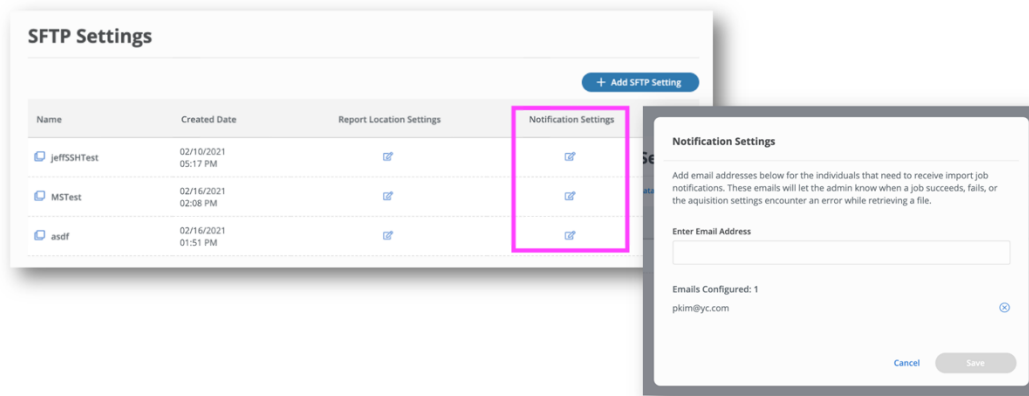
NOTE: These instructions were created using a Mac OS.