SFTP Connection and File Transfer Details

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# Summary

The purpose of this document is to define the YourCause standard for file transfer and to communicate relevant data for configuring the file exchanges.

# File Transfer Specifications and Term Definitions

## Introduction

This document describes the options for SFTP Connectivity with YourCause and provides descriptions of the files transferred to and from YourCause.

## Hosting

YourCause supports file transfer via SFTP. YourCause can host the server, or YourCause can connect to a server hosted externally.

## Environments

YourCause supports two environments: UAT and Production.

1. **YourCause-Hosted Server:** Separate accounts will be created for the two environments. The files specific to each environment must be delivered to the respective account for that environment.
2. **Externally-Hosted Server:** The external SFTP must include separate, environment-specific drop locations for files. This can be done using separate accounts, or by using subfolders on a single account.

## Encryption

YourCause supports PGP-encryption of payroll files and requires PGP-encryption of HR files.

1. **Files to YourCause:** YourCause will provide a separate key for each environment.
   * Files specific to an environment must only be encrypted with the key provided for that environment.
2. **Files from YourCause:** Client must provide an encryption key to YourCause.
   * If a different key is used for each environment, both must be provided.

## Granting IP Exceptions

For a list of IP addresses to use for granting exceptions, see [Inclusion and exclusion lists – IP addresses](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/csrconnect-qa/content/csrc-inc-exc-lists.html).

## File Types

## **HR Files:**

* + Client to YourCause
  + This demographic file provides user data to YourCause for access and reporting.

\*All files must have the same format, frequency and schedule.

## **Payroll Actual Files:**

* + Client to YourCause
  + This file details what the client actually deducted for each employee for that pay period.

## **Payroll Deduction Files:**

* + YourCause to Client
  + This file details the amounts requested by employees to be deducted from their payroll.

Client Name: Click or tap here to enter text.

## **HR File**

* + SFTP host:  YourCause  Client
  + Blackbaud host name: UAT: ycsecureftp.yourcauseuat.com
  + Blackbaud host name PROD: ycsecureftp.yourcause.com
  + Client host name: Click or tap here to enter text.
  + Username for UAT: Click or tap here to enter text.
  + Username for Prod: Click or tap here to enter text.
  + Port: 22
* File naming format: Click or tap here to enter text.
* File schedule:
  + Frequency: Twice weekly  Weekly  Biweekly

Monthly  Quarterly  Other: Click or tap here to enter text.

* + Day and Time: Click or tap here to enter text.
* Folder and other details: Click or tap here to enter text.
* IP addresses from which SFTP will be accessed for exception: Click or tap here to enter text.
* Multiple files:  Yes  No

\*All files must have the same format, frequency and schedule.

* + If yes, provide location and names for additional files below:
    - Click or tap here to enter text.
    - Click or tap here to enter text.
    - Click or tap here to enter text.

## **Payroll Deductions File**

* + SFTP host:  YourCause  Client
  + Blackbaud host name UAT: ycsecureftp.yourcauseuat.com
  + Blackbaud host name PROD: ycsecureftp.yourcause.com
  + Client host name: Click or tap here to enter text.
  + Username for UAT: Click or tap here to enter text.
  + Username for Prod: Click or tap here to enter text.
  + Port: 22
* File naming format: Click or tap here to enter text.
* File schedule:
  + Frequency: Twice weekly  Weekly  Biweekly

Monthly  Quarterly  Other: Click or tap here to enter text.

* + Day and Time: Click or tap here to enter text.
* Folder and other details: Click or tap here to enter text.
* IP addresses from which SFTP will be accessed for exception: Click or tap here to enter text.
* Multiple files:  Yes  No

\*All files must have the same format, frequency and schedule.

* + If yes, provide location and names for additional files below:
    - Click or tap here to enter text.
    - Click or tap here to enter text.
    - Click or tap here to enter text.

## **Payroll Actuals File**

* + SFTP Host:  YourCause  Client
  + Blackbaud Host name UAT: ycsecureftp.yourcauseuat.com
  + Blackbaud Host name PROD: ycsecureftp.yourcause.com
  + Client host name: Click or tap here to enter text.
  + Username for UAT: Click or tap here to enter text.
  + Username for Prod: Click or tap here to enter text.
  + Port: 22
* File naming format: Click or tap here to enter text.
* File schedule:
  + Frequency: Twice weekly  Weekly  Biweekly

Monthly  Quarterly  Other: Click or tap here to enter text.

* + Day and Time: Click or tap here to enter text.
* Folder and other details: Click or tap here to enter text.
* IP addresses from which SFTP will be accessed for exception: Click or tap here to enter text.
* Multiple files:  Yes  No

\*All files must have the same format, frequency and schedule.

* + If yes, provide location and names for additional files below:
    - Click or tap here to enter text.
    - Click or tap here to enter text.
    - Click or tap here to enter text.