AlphaSense

SFTP Sync : Installation Guide

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Context

This guide consists of two installation steps

- Step 1 : PuTTY Installation and SSH key generation guide for windows
- Step 2 : SFTP Sync Installation Guide

Step 1 : PuTTY - Installation and SSH key generation guide for Windows

This is a guide to **install PuTTY** and **generate SSH keys using PuTTYGen** which would be required for secure access with **SFTP Sync** setup using **WinSCP**.

This is **Step 1** of the setup process. Once the access is configured from AlphaSense side you can proceed with **Step 2**.

Download and Install PuTTY

 You can download the installer from <u>here</u>. [https://www.chiark.greenend.org.uk/~sgtatham/putty/latest.html]

NOTE: If you have a 64-bit computer, it is recommended that you install the 64-bit version putty-64bit-<version>-installer.msi. If you don't know or don't care, it is always safe to use the 32-bit version (putty-<version>-installer.msi).

- 2. Navigate to the Downloads directory (or wherever you saved the installer), and double-click on the file name.
- 3. Complete the installation with default options, for detailed guide you can refer to this page. [https://www.ssh.com/academy/ssh/putty/windows/install]

Generate SSH keys from PuTTYGen

1. Run PuTTYGen : Go to Windows **Start menu** \rightarrow **All Programs** \rightarrow **PuTTY** \rightarrow **PuTTYgen.** Or search for **PuTTYgen.**

ổ PuTTY Key Generator	? ×
<u>File Key Conv</u> ersions <u>H</u> elp	
Key No key.	
Actions	
Generate a public/private key pair	Generate
Load an existing private key file	Load
Save the generated key Save public key	<u>S</u> ave private key
Parameters	
Type of key to generate: ● <u>R</u> SA ○ <u>D</u> SA ○ <u>E</u> CDSA ○ ED <u>2</u> 5519	○ SSH- <u>1</u> (RSA)
Number of <u>b</u> its in a generated key:	2048

2. Now click on **Generate** and start moving the mouse within the Window. This movement would be used to generate randomness.

😴 PuTTY Key Generator			?	×
File Key Conversions Help				
Key				
Please generate some randomness by m	oving the mouse ove	er the blank area.		
Actions				
Generate a public/private key pair			Generate	
Load an existing private key file			Load	
Save the generated key		Save public key	Save private key	
Parameters				
Type of key to generate:) ECDSA	CEdDSA	O SSH-1 (RSA)	
Number of bits in a generated key:			2048	

3. Once the progress bar completes you should see keys generated on your screen.

😴 PuTTY Key Generator	? ×
File Key Conversions Help	
Key	
Public key for pasting into OpenSSH authorized_keys file:	
ssh-rsa AAAAB3NzaC1yc2EAAAADAQABAAABAQCZn3htAEbep6vcpUTabfVvS74ijqLDX +HjSkibqD/Ns7U3pqxOZikeUOLbOIJExSHpw3xtpgZp3NaiWlucqpfnQcCq +c2yUMf3NiFukABbMPaB5qOuYq10Eafk1uh8s0LRInPruiHlqqG4NzLiWnGZ6mDaefBOxG	m6HlfcQxaT80cDaAK
TDh54q0PuL7EBDQPAArFzjgZ3ll1RW9jzjQLnguklRxwY8b934f/zqsuxH +XmwC7uorzy1k8dS1Uez/bNDPoA9FCaG0vAk/PV5YhPuk	v .
Key fingerprint: ssh-rsa 2048 SHA256:PsCeQ9zSzR3wmAjR4un1wwAeC4le2cLS5IW	/OltVMTj4
Key comment: rsa-key-20220513	
Key passphrase:	
Confirm passphrase:	
Actions	
Generate a public/private key pair	Generate
Load an existing private key file	Load
Save the generated key Save public key	Save private key
Parameters	
Type of key to generate:	🔿 SSH-1 (RSA)
Number of bits in a generated key:	2048

- 4. We recommend adding a passphrase here and please remember this passphrase will be required in the second step to set up SFTP Sync.
- Click on Save private key select folder of your choice (You can create a folder with name like SSHKeys under Downloads, Desktop, Documents or any other location, but make sure you keep it handy.). For sake of simplicity, name the file as private (or any other name you feel appropriate).

This private key file would be required to set up SFTP Sync using WinSCP.

6. Click on **Save public key** select folder selected in earlier step and for simplicity name the file as **public** (or any other name you feel appropriate). This public key file **needs to be shared with AlphaSense**.

📙 🛃 📕 🗢 SSH-key-kn				
File Home Share	/iew			
\leftarrow \rightarrow \checkmark \uparrow \frown \rightarrow This PC	> Documents > SSH-ke	y-kn		
🔹 Quick access	Name	Date modified	Туре	Size
A Quick access	🚊 private	5/13/2022 7:54 AM	PuTTY Private Key	2 KB
💻 This PC	D public	5/13/2022 7:54 AM	File	1 KB
🔿 Network				

Share Public Key with AlphaSense

- 1. Send the **public** key file that we have saved in the earlier step with **AlphaSense** over the email so that we can use this to provide access to our systems.
- 2. Now sit tight and wait for confirmation from us. Once confirmed proceed with **Step 2** for **SFTP Sync Installation**.

Step 2 : SFTP Sync - Installation Guide

Before starting this setup it is required that you have already generated ssh keys using PuTTY and shared the public key with AlphaSense.

Once you have confirmation on access then proceed with further steps.

SFTP Client : WinSCP Installation

- 1. Download zip file from <u>link</u> provided by AlphaSense.
- 2. Unzip the file at some easily accessible location like Downloads, Desktop, Documents.
- 3. The unzip folder will have WinSCP Setup .exe
- Follow steps from here for installation (Check for Installation Section) : <u>https://winscp.net/eng/docs/guide_install</u>
 Note: Select setup type as Typical Installation
- 5. After installation you should see this folder in your system : C:\Program Files (x86)\WinSCP

Set up AlphaSense scripts

Go to the folder where you have unzipped the AlphaSense setup .zip. These files along with setup exe will be in the selected folder.

- 1. alphasense-create-scheduled-task.bat
- 2. alphasense-input-file.bat
- 3. alphasense-sftp-script.txt
- 4. alphasense-sftp-sync.bat

Go ahead and double click on **alphasense-create-scheduled-task.bat**, some command prompt pop up will appear for a few seconds and vanish. This would move required files to WinSCP installation and a scheduler task for automatic synchronization is set up.

1. Set variables

Now you need to update a file to enable SFTP Sync from your machine.

- a. Go to C:\Program Files (x86)\WinSCP\ folder
- b. Open the file alphasense-input-file.bat in notepad or any other text editor.
- c. The lines starting with '::' have directions and samples for what should be modified, steps are documented here as well.
- d. Set SFTP_HOST_URL : Replace **#PUT_USERNAME#** with your AlphaSense username.
- e. Set SFTP_SSH_PRIVATE_KEY : Replace #PATH-TO-SSHKEY# with the path of the SSH private key that was generated earlier (<u>Step One</u>) using PuTTYgen. Make sure that the path that is being entered is between double quotes.
 E.g. "C:\Users\Administrator\Downloads\Privatekey.ppk"
 [TIP For copying file path: Go to the folder where the private key is saved, hold down the Shift key and right-click the file. Copy As Path: Click this option to paste the full file path in here.]
- f. Set SSH_PASSPHRASE : Replace **#YOUR-PASSWORD#** with the passphrase set while generating the ssh private key.
- g. Set LOCAL_DIRS : Replace #comma-seperated-paths-of-local-folders# with a path of folders to be synced. If you want to sync multiple folders, provide a list of folders comma separated (D:\Testing,D:\Alphasense).
 All files and subfolders under this would be automatically synced.
 NOTE : For network drives only UNC (Universal Naming Convention) paths will work in format \\servername\path servername is usually a machine name or ip address on your LAN E.g. \\172.168.1.1\AlphaSense. For local folders you can puth paths directly with drive names E.g. D:\Testing.
 [Important : In future if you want to modify folders that are being synced, user can modify this list]
- h. Save the file and Close the file.

2. Update configuration in Task Scheduler

This is the final stage in the process. Task in the scheduler needs some changes in order to make sure it's running correctly.

- a. Press Windows key and search for Task Scheduler or Schedule Tasks.
- a. Click on Task Scheduler or Scheduler Tasks in the result list.
- b. In the left pane expand the Task Scheduler Library.
- c. You should see the **AlphaSense** folder under which is the task that we created for synchronization.

AlphaSense

Task Scheduler File Action View Help							
 Task Scheduler (Local) Task Scheduler Library AlphaSense Microsoft 	Name	Status Running	Triggers At 6:42 AM on 5/16/2022 - Afte	r triggered, repeat every 15 minutes indefinitely.	Next Run Time 5/16/2022 10:27:00 AM	Last Run Time 5/16/2022 10:12:00 AM	Last F The c
	<	ers Actions	Conditions Settings History	1			
	Name:	SFTP-SYNC	- contaitons sectings history				
	Location: \	AlphaSense					
	Author: I Description:	EC2AMAZ-H	E9IA2L\Administrator				

- d. Select the SFTP-SYNC task and double click to open the task.
- e. Update Security Options : Under the General tab -> Security Options, select 'Run whether user is logged on or not' option. See image below for reference.

③ SFTP-SYNC	Properties (Loc	al Computer)					×
General Trigg	gers Actions	Conditions	Settings	History				
Name:	SFTP-SYNC							
Location:	\AlphaSense							
Author:	EC2AMAZ-HE	9IA2L\Admir	nistrator					
Description:								ון
-Security opt	ions							-
When runn	ing the task, use	the followir	ng user acc	count:				
Administrat	or		-			Change User	or Group	
O Run only	when user is lo	gged on						
Run whe	ther user is log	ged on or no	t 🔶					
🗌 Do n	ot store passwo	rd. The task	will only l	nave access to local compu	iter res	sources.		
🗌 Run with	highest privile	ges						
Hidden	Configure	e for: Wind	lows Vista	™, Windows Server™ 2008			~	•
						ОК	Cancel	

f. Update Power conditions : Under Conditions Tab in Power section make sure that 'Start the task only if the computer is on AC power' is unchecked.

AlphaSense

	Triggers	Actions	Conditions	Settings	History		
Specify run if a Idle	the condi any condit	tions that, ion specifi	along with the is not	ne trigger, t true.	determir	e whether the task shou	ld run. The task will not
Star	t the task o	only if the	computer is i	dle for:		10 minutes	\sim
	Wait fo	or idle for:				1 hour	~
✓ S	top if the o	computer	ceases to be i	dle			
	Restart if	the idle s	tate resumes				
ower							
_ Star	t the task o	only if the	computer is o	on AC pow	/er		
S	top if the o	computer	switches to b	attery pow	/er		
Wak	the com	puter to r	un this task				
Netwo	rk ——						
Star	t only if th	e followin	g network co	nnection is	s availabl	e:	
	connectio	n					
Anv	connectie						
Any							
Any							
Any							
Any							

g. After these steps click on **OK**. Task scheduler will ask for administrator password.

Task Scheduler	?	×
	G	
Enter user account in	nformation for running this task.	
User name:	🖸 administrator 🗸 🗸	
Password:		
	OK Cance	I

- h. Enter the password and click on **OK**.
- i. Close Task Scheduler.

Your setup is complete, your files would be synced to AlphaSense.

Debug guide

1. How to check logs?

Logs for SFTP Sync will be generated at C:\Program Files (x86)\WinSCP\alphasense-winscp-logs.logs These can be referred in case of hiccups.

2. How to check the task scheduler?

- a. Press Windows key and search for Task Scheduler or Schedule Tasks.
- b. Click on Task Scheduler or Scheduler Tasks in the result list.
- c. In the left pane expand the Task Scheduler Library.
- d. You should see the **AlphaSense** folder under which is the task that we created for synchronization.
- e. Select the SFTP-SYNC task.
- f. Check the **History tab** for the synchronization trigger history.

3. How to check folder status in WinSCP?

Folder synchronization status can be checked with WinSCP UI. Follow these steps.

- a. Press Windows key and search for WinSCP.
- b. Open WinSCP and login dialogue should open up.
- c. Enter Host name user-content.alpha-sense.org and your User name.

🌆 Login		– 🗆 X
Vew Site	Session Eile protocol: SFTP Host name: user-content.alpha-sense.org User name: Password: fsync_7 Save	Port number:
Iools Manage ✓ Show Login dialog on startup and when the last	E Login V Close	Help

- d. Click on **Advanced** and another pop-up window will appear.
- e. Go to SSH -> Authentication.
- f. In Authentication parameters, click on the box next to the Private key file.

Advanced Site Settings		?	×
Environment Directories Recycle bin Encryption SFTP Shell Connection Proxy Tunnel SSH Key exchange Authentication Bugs Note	□ Bypass authentication entirely Authentication options □ □ Attempt authentication using Pageant □ Attempt authentication using Pageant □ Attempt 'keyboard-interactive' authentication □ Respond with a password to the first prompt □ Attempt TIS or CryptoCard authentication (SSH-1) Authentication parameters □ □ Allow agent forwarding Private key file: □ □ Display Public Key Tools ▼ GSSAPI □ □ Allow GSSAPI authentication □ Allow GSSAPI credential delegation		
Color 🔻	OK Cancel	He	elp

g. Select the private ssh key file and click on **OK**.

Advanced Site Settings		?	×
Environment Directories Recycle bin Encryption SFIP Shell Connection Proxy Tunnel SSH Key exchange Authentication Bugs Note	□ Bypass authentication entirely Authentication options □ □ Attempt authentication using Pageant □ Attempt 'keyboard-interactive' authentication □ Respond with a password to the first prompt □ Attempt TIS or CryptoCard authentication (SSH-1) Authentication parameters □ □ Allow agent forwarding Private key file: □ □ Lisers \Administrator \Desktop \new-sshkeys \private.ppk □ Display Public Key Tools GSSAPI		
Color 🔻	OK Cancel	He	lp

h. Click on **Login**, now a dialog box will appear asking you enter the passphrase. Enter the passphrase.

Key pa	ssphrase - fsync_7-rc@user-content.alpha-sense.org	<
	Searching for host Connecting to host Authenticating Using username "fsync_7-rc". Authenticating with public key "rsa-key-20220510".	
Passphr	ase for key 'rsa-key-20220510':	
	OK Cancel Help	

i. Once you are connected to the SFTP Sync server on the right pane, all the synced folders will appear.

bocuments - fsync_7-rc@user-cont	ent.alpha-sense.org	- WinSCP				-		×
Local Mark Files Commands Sessio	n Options Remot	te Help						
🖶 🔁 📚 Synchronize 🗾 🦑 📓	🛯 🎲 🖓 Queu	e 🔹 🛛 Transfer Settings De	fault	• 🥵 •				
📮 fsync_7-rc@user-content.alpha-sen	se.org 🗙 🚅 Nev	w Session						
📑 My documents 🔹 🚰 🔹 🔽 🔹	+ + → +	🗈 🏠 🎜 🐍		587-43 • 🚰 • 🟹 • 🖛 •	-> - 🖻 🗖 😭	🔁 🔯 Find Files 🧯	2	
🔢 Upload 👻 📝 Edit 👻 🚮 🕞	Properties 📑 N	lew - 🕂 🗕 🗸		Download - 📝 Edit - 🗙 🛃	Properties	New - + - 🗸		
C:\Users\Administrator\Documents\				/as.prod.static.user-content/587-43/				
Name	Size	Туре	Chan	Name	Size	Changed		
		Parent directory	5/18/3	t.				
SFTP test docs		File folder	5/18/3	📙 400 GB folder - 17May		1/1/1970 12:00:00 AM		
Share Check Documents		File folder	4/20/	Latest 400 GB folder		1/1/1970 12:00:00 AM		
SSH-key-kn		File folder	5/16/3	New 665 Gb folder		1/1/1970 12:00:00 AM		
© 20200122 - PR - 315_BM - SmarTo	57 KB	Chrome HTML Document	3/30/2	New folder		1/1/1970 12:00:00 AM		
© 20200610 - PR - AMZN - Surveillan	83 KB	Chrome HTML Document	3/30/	SFTP test docs		1/1/1970 12:00:00 AM		
				Testing		1/1/1970 12:00:00 AM		
				I lesting Auto tags		1/1/19/0 12:00:00 AM		
				winscp_testdocs		1/1/19/0 12:00:00 AM		
<			>	<				>
0 B of 138 KB in 0 of 5			5 hidden	0 B of 0 B in 0 of 8				
						G SFTP-3	0:0	0:19
alphasense-winscn-logs.txt.9	5/16/2022	10:42 PM 9 File	256	000 KB		14 H	510	

j. Double click on the folder and on the bottom you will see the details of synchronization (Folder size uploaded, No of files etc.)

	SFTP test (🝷 🚰 🝷 [7		🗎 🥭 🔯 Find File	es 🔓
	🛛 🚔 Download 👻 📝 E	dit - 🗙 🚮	Properties	🕈 New 🗸 📑 🖃	V
	/as.prod.static.user-conte	nt/587-43/SFTF	o test docs/		
Chanı 5/18/: 4/20/: 5/16/: 3/30/: 3/30/:	Name testDoc_pptx.pptx testDoc_xls.xls testDoc_xlsx.xlsx testDoc_txt.txt		Size 22 KB 10 KB 96 KB 1 KB	 Changed 5/18/2022 11:57:27 5/18/2022 11:57:27 5/18/2022 11:57:25 5/18/2022 11:57:28 	7 AM 7 AM 7 AM 3 AM
> 5 hidden	< 0 B of 125 KB in 0 of 4				>
	×× 1/8			G SFTP-3	0:00:33
256	DOD KB				

4. Configure Default sharing

SFTP Sync solution does not support custom sharing as of now. But you can take advantage of the **Default** sharing option in AlphaSense.

a. Got to bottom left of AlphaSense UI and click on your account icon and click on **Preferences**

	KN Kaustubh Nangare k@gmail.com
	Account
	Preferences
	Research Access
	Feature Preview
? <u> </u>	əLogout

- b. In preferences you would find the Sharing & Privacy section on the left pane.
- c. Enable Documents You Add to AlphaSense Are Visible By Default option.



- d. There are two options for sharing,
 - Everyone in your firm : This will share documents with everyone in your firm.
 - Selected individuals or groups : This will allow you to add some individuals or groups as default sharing.

Sharing & Privacy	
Documents You Add to AlphaSense Are Visible By Default	_
When you add a document to AlphaSense, make it visible to others by default, including any annotations you make on it.	ON
Make documents visible to:	
Everyone in your firm	

e. If you select **Selected individuals or groups** click on select and this box will open.

Type a user or grou	o name, or select fro	m the list below	
Select All			
□ testCompany	atester		
C Kaustubh Nar	igare		

- f. Now you can either select Users and existing groups or click on **Edit Groups..** to create a new group.
- g. Enter Group Name, select users and Save.

New Untitled Group		v Untitled Group e a user name or sele elect All testCompany atester	ct from list below	
		Kaustubh Nangare		
	Group		Delete Group	

- h. Now this group can be selected for default sharing.
- i. The documents synced through **SFTP Sync** will now by default be shared with the option you have selected from above.