

SFTP Sync : Installation Guide

Index

Context	2
Step 1 : PuTTY - Installation and SSH key generation guide for Windows	2
Download and Install PuTTY	2
Generate SSH keys from PuTTYGen	3
Share Public Key with AlphaSense	5
Step 2 : SFTP Sync - Installation Guide	5
SFTP Client : WinSCP Installation	5
Set up AlphaSense scripts	5
Set variables	6
Update configuration in Task Scheduler	6
Debug guide	9
How to check logs?	9
How to check the task scheduler?	9
How to check folder status in WinSCP?	9
Configure Default sharing	12

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

1. You can download the installer from [here](#).

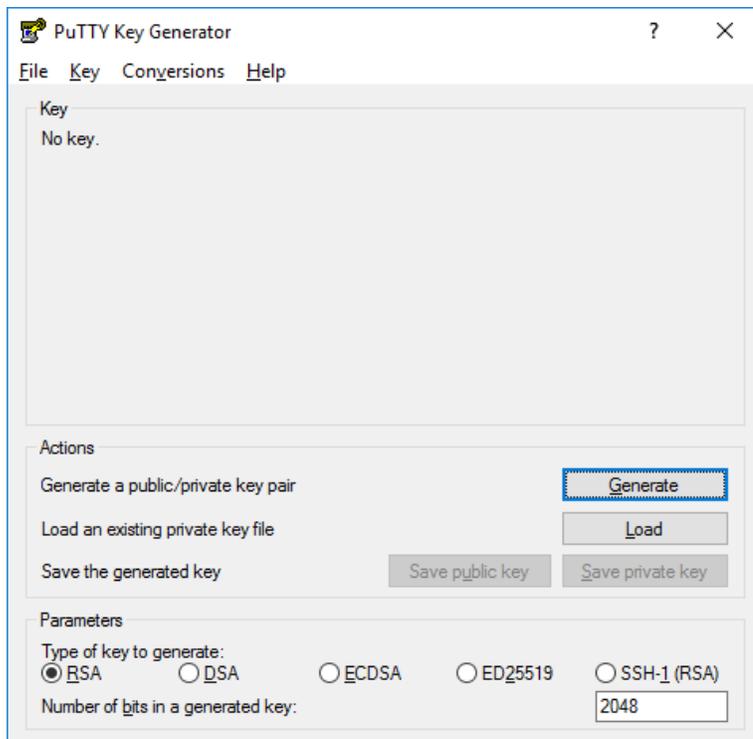
[<https://www.chiark.greenend.org.uk/~sgtatham/putty/latest.html>]

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`).

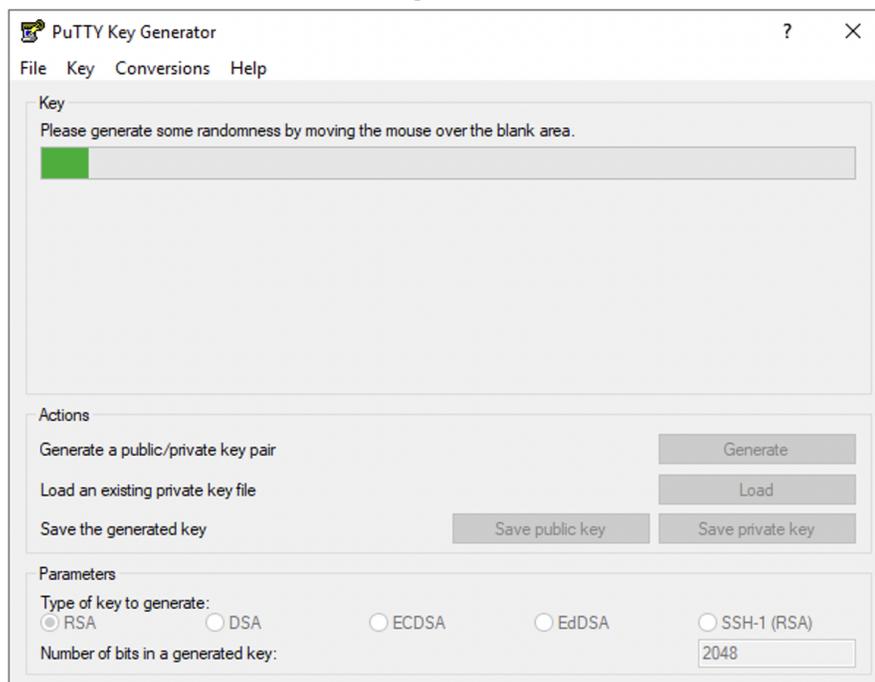
2. Navigate to the Downloads directory (or wherever you saved the installer), and double-click on the file name.
3. Complete the installation with default options, for detailed guide you can refer to [this](#) page. [<https://www.ssh.com/academy/ssh/putty/windows/install>]

Generate SSH keys from PuTTYGen

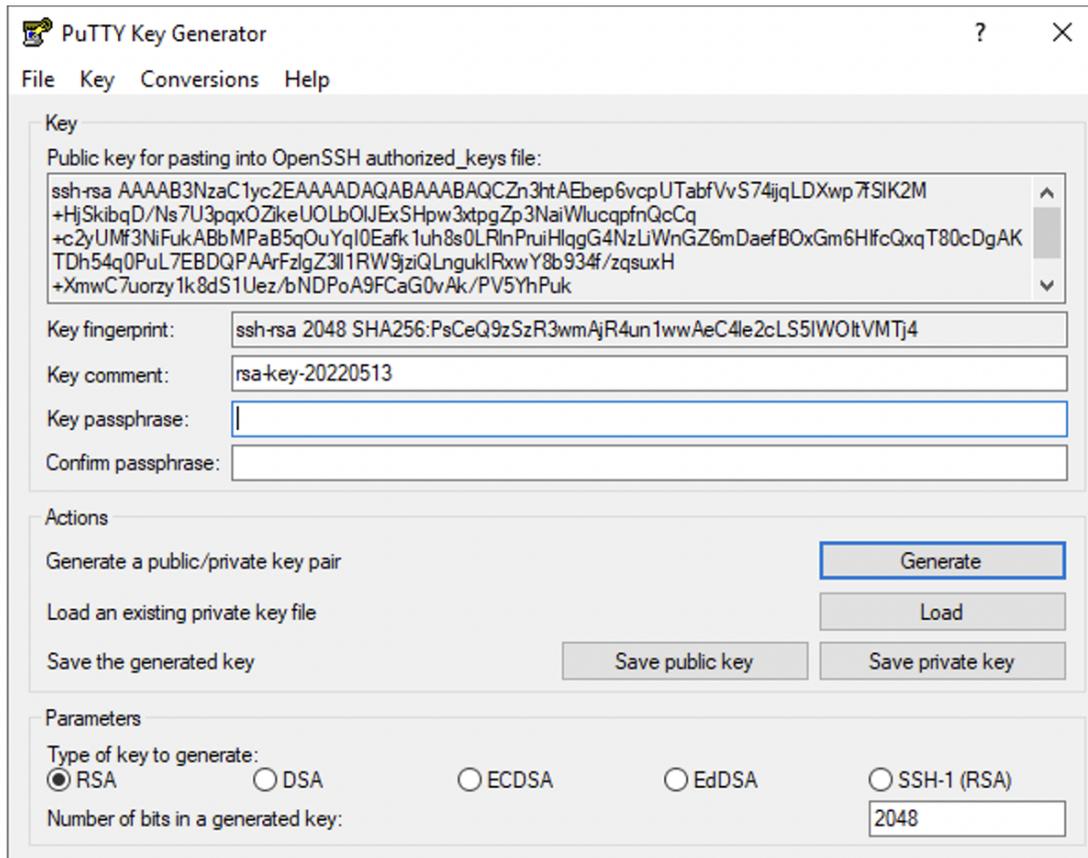
1. Run PuTTYGen : Go to Windows **Start menu** → **All Programs** → **PuTTY** → **PuTTYgen**. Or search for **PuTTYgen**.



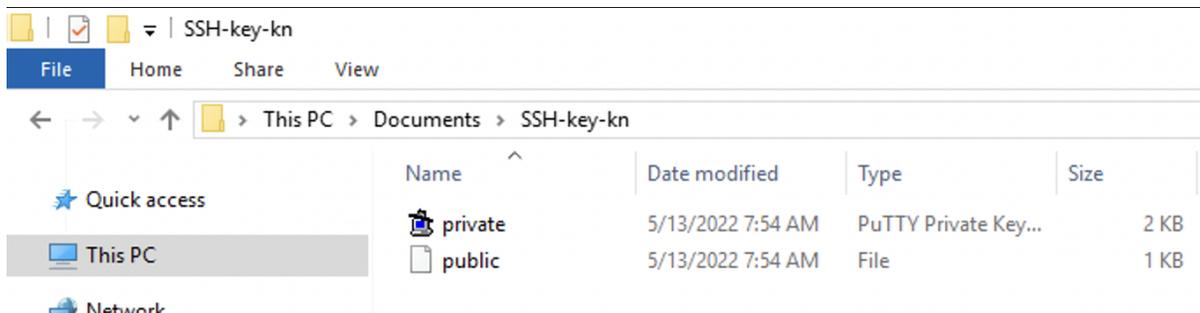
2. Now click on **Generate** and start moving the mouse within the Window. This movement would be used to generate randomness.



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



- 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**.
- 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**.



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 [link](#) 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
4. Follow steps from here for installation (Check for Installation Section) :
https://winscp.net/eng/docs/guide_install
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

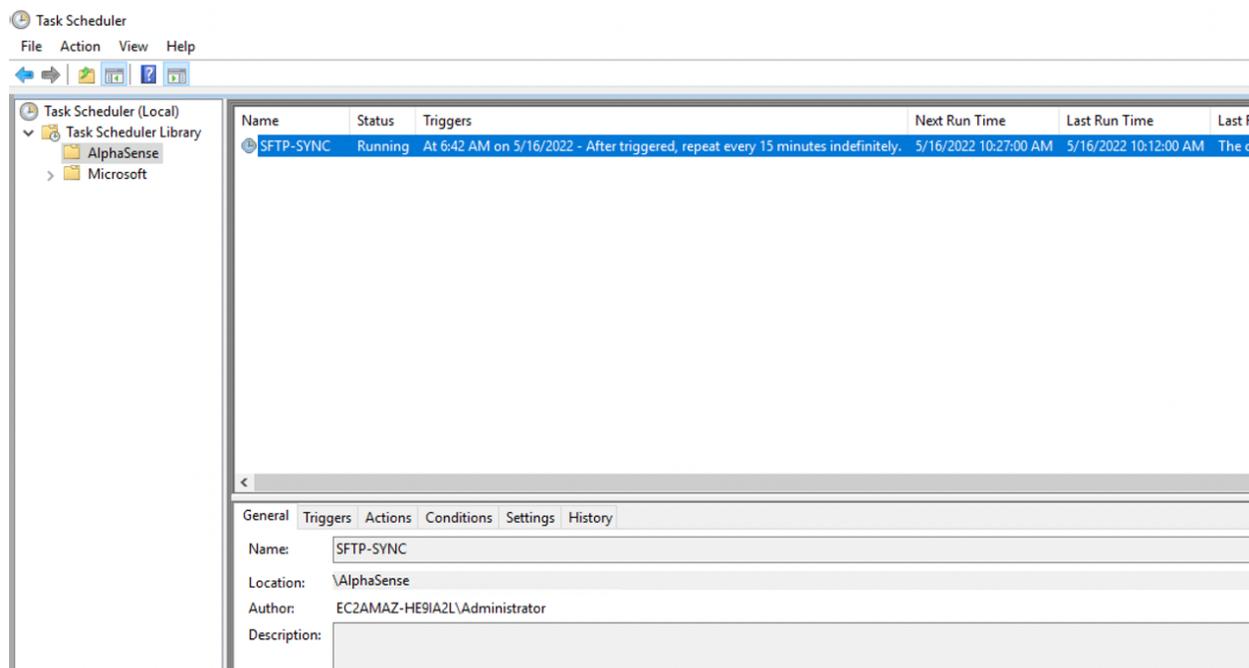
Now you need to update a file to enable **SFTP Sync** from your machine.

- 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 ([Step One](#)) 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.

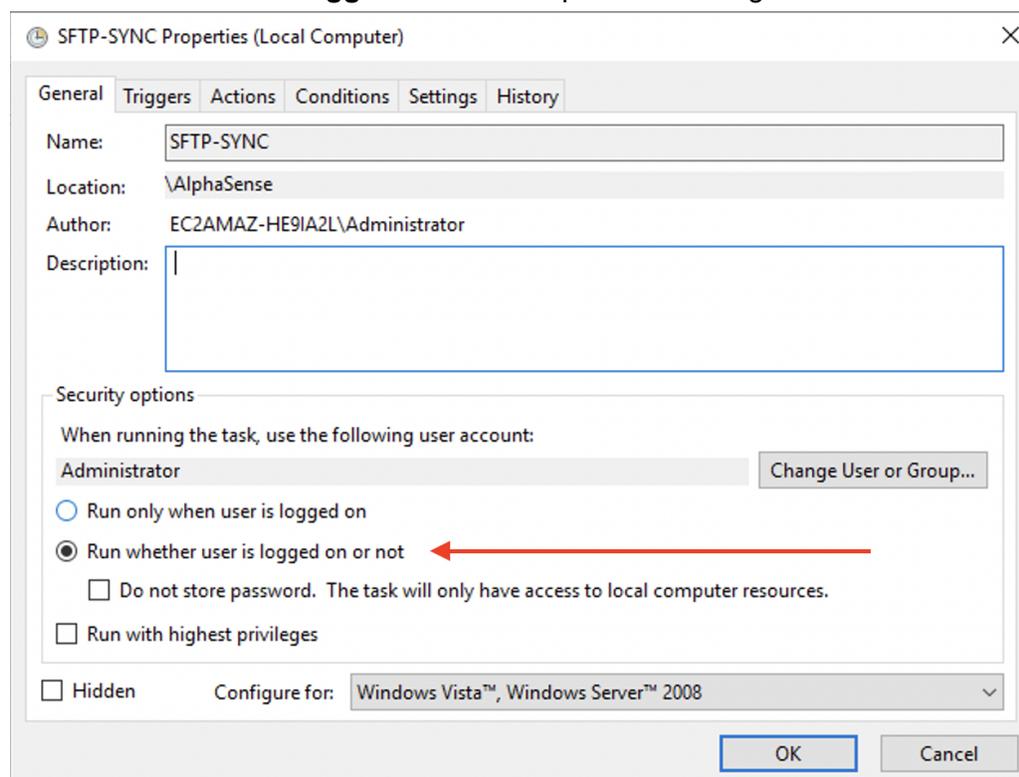
2. Update configuration in Task Scheduler

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

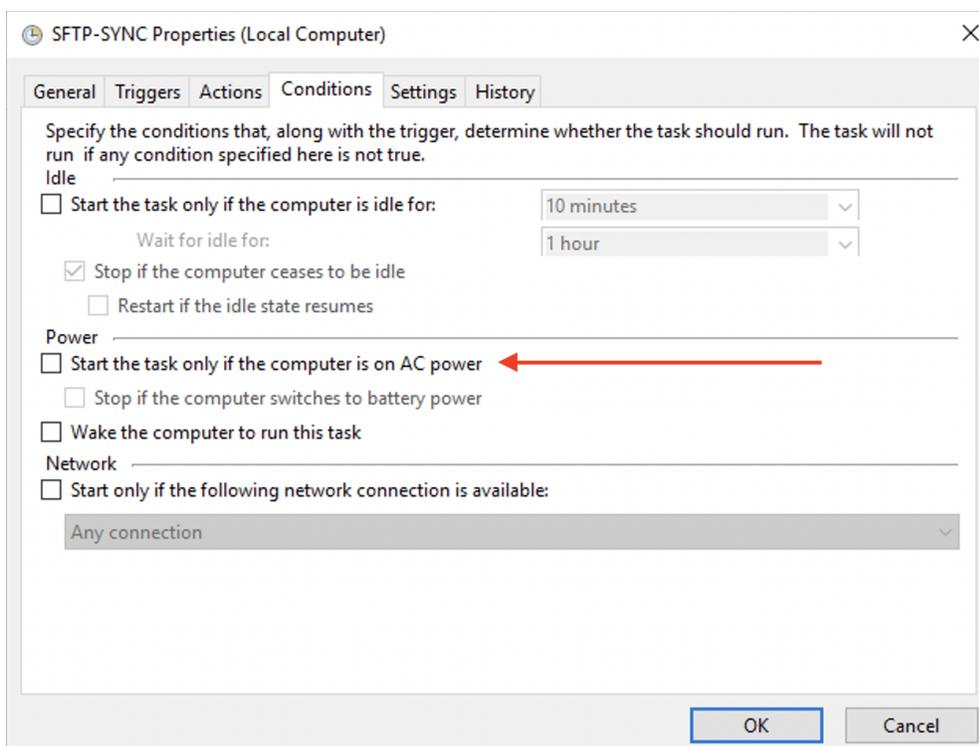
- a. Press **Windows** key and search for **Task Scheduler** or **Schedule Tasks**.
- a. Click on **Task Scheduler** or **Scheduler Tasks** in the result list.
- b. In the left pane expand the **Task Scheduler Library**.
- c. You should see the **AlphaSense** folder under which is the task that we created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



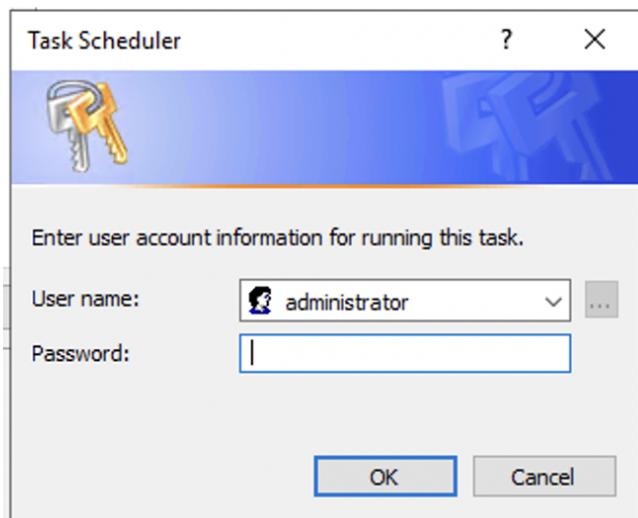
- Select the **SFTP-SYNC** task and **double click** to open the task.
- Update **Security Options** : Under the **General** tab -> **Security Options**, select '**Run whether user is logged on or not**' option. See image below for reference.



- 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**.



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



- 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.

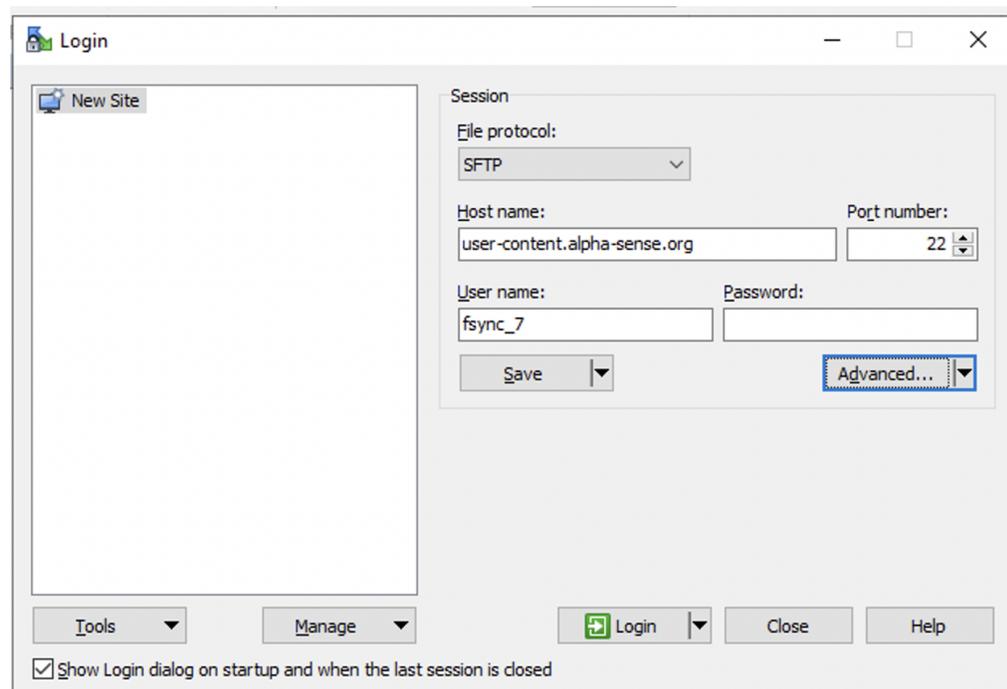
2. How to check the task scheduler?

- 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.

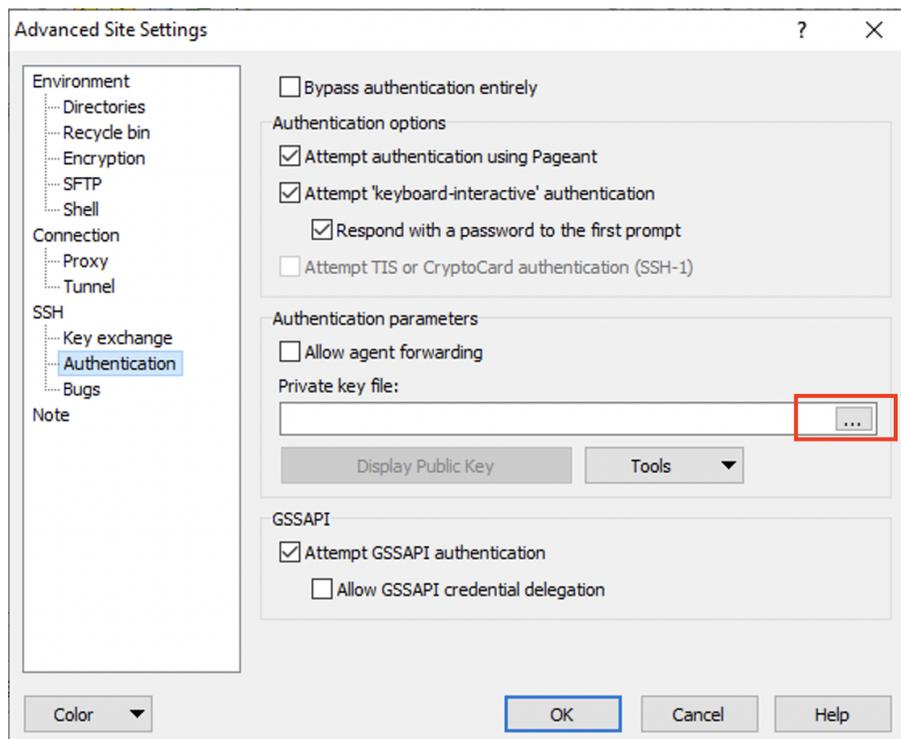
3. How to check folder status in WinSCP?

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

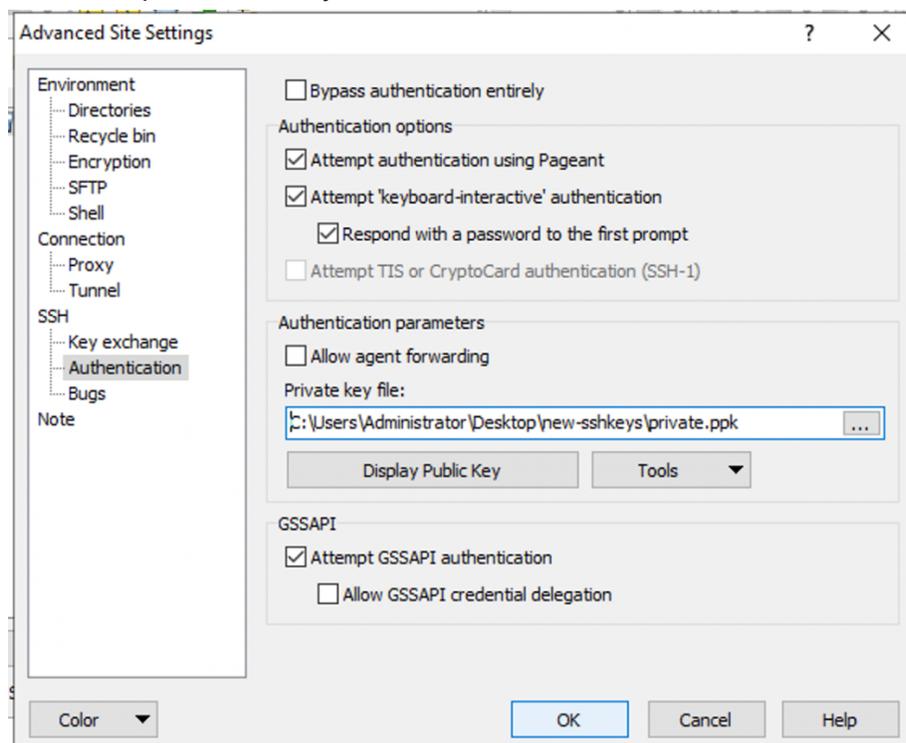
- a. Press **Windows** key and search for **WinSCP**.
- b. Open WinSCP and login dialogue should open up.
- c. Enter Host name **user-content.alpha-sense.org** and your **User name**.



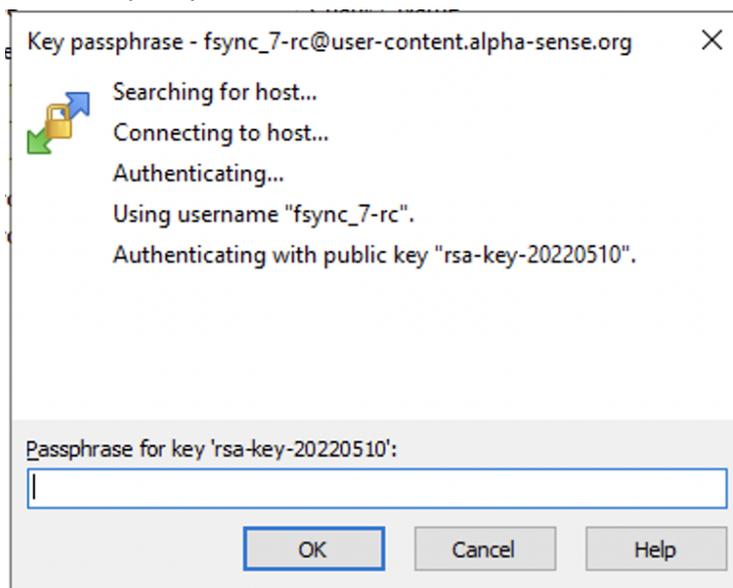
- d. Click on **Advanced** and another pop-up window will appear.
- e. Go to **SSH -> Authentication**.
- f. In **Authentication parameters**, click on the box next to the **Private key file**.



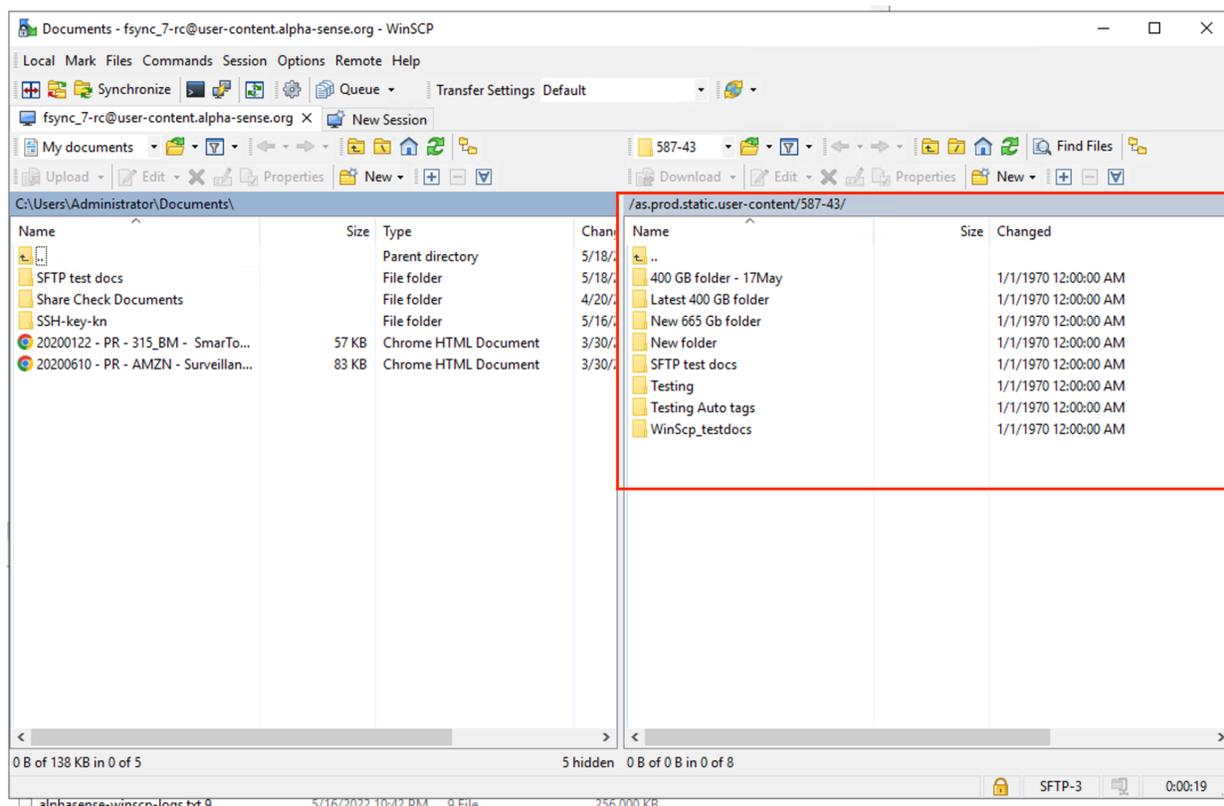
- g. Select the private ssh key file and click on **OK**.



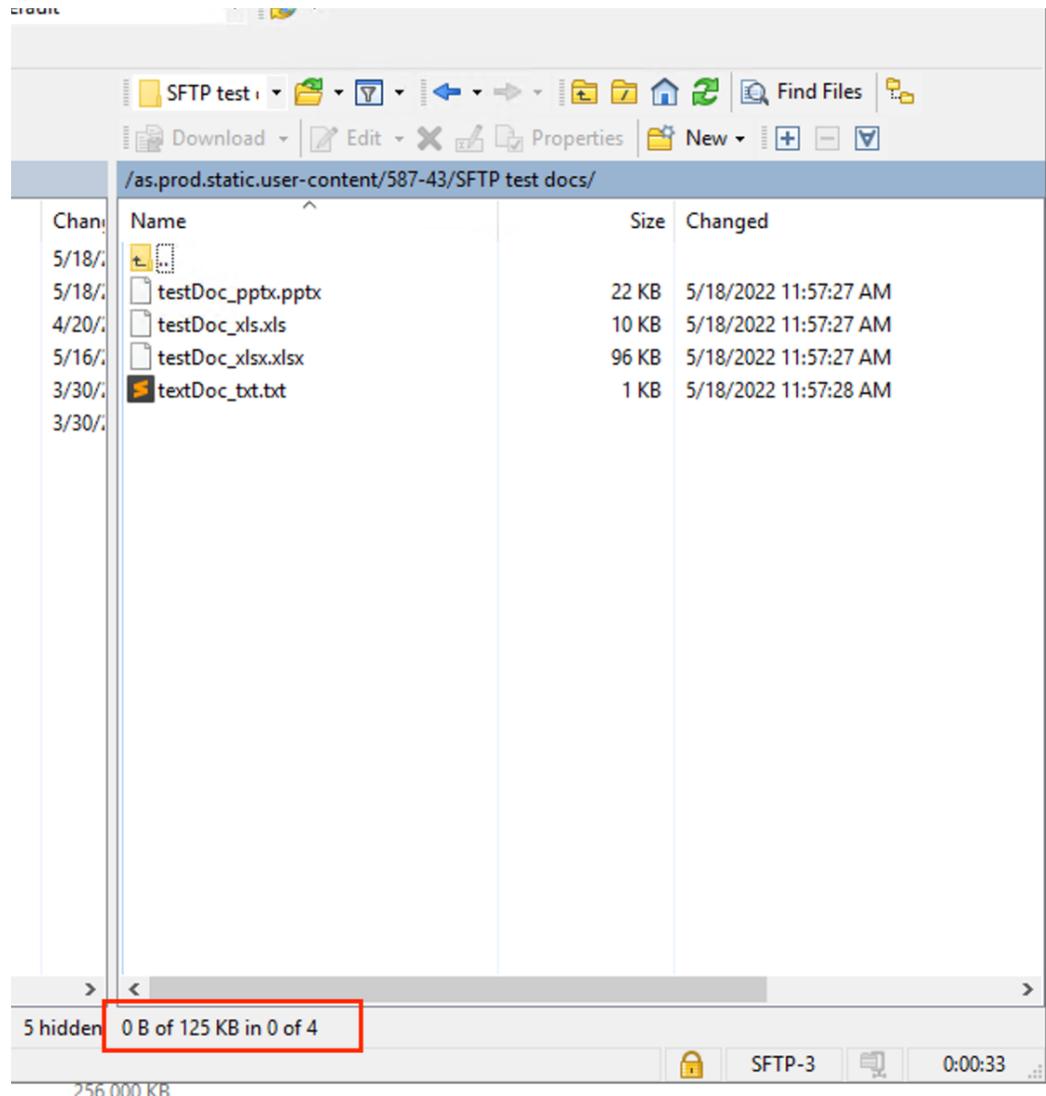
- h. Click on **Login**, now a dialog box will appear asking you enter the passphrase. Enter the passphrase.



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



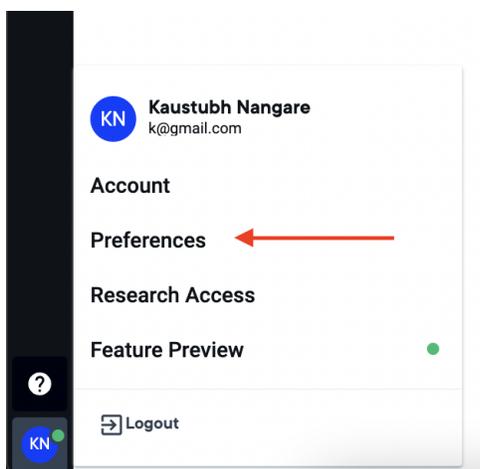
- j. Double click on the folder and on the bottom you will see the details of synchronization (Folder size uploaded, No of files etc.)



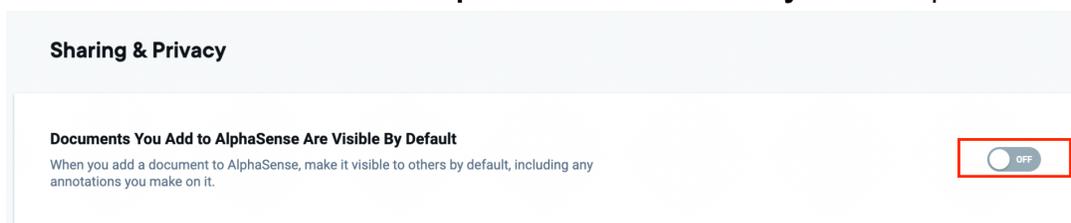
4. Configure Default sharing

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

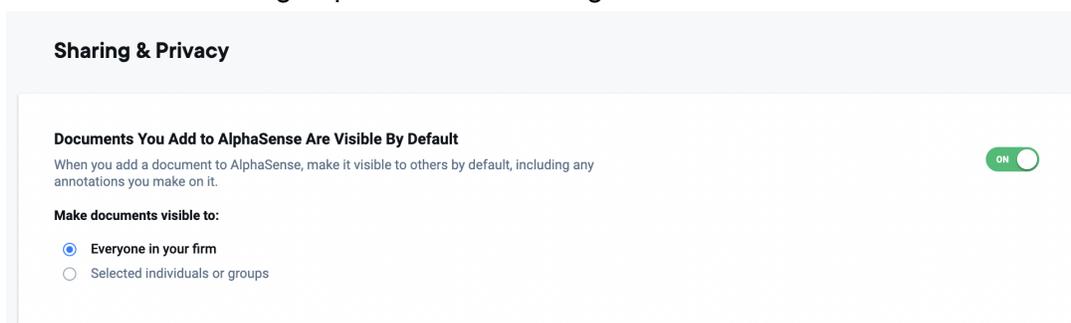
- a. Got to bottom left of AlphaSense UI and click on your account icon and click on **Preferences**



- 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.



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

Select Users

Type a user or group name, or select from the list below

Select All

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Kaustubh Nangare

- 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**.

Manage Sharing Groups

New Untitled Group 00

GROUP NAME

New Untitled Group

Type a user name or select from list below

Select All

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- 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.