

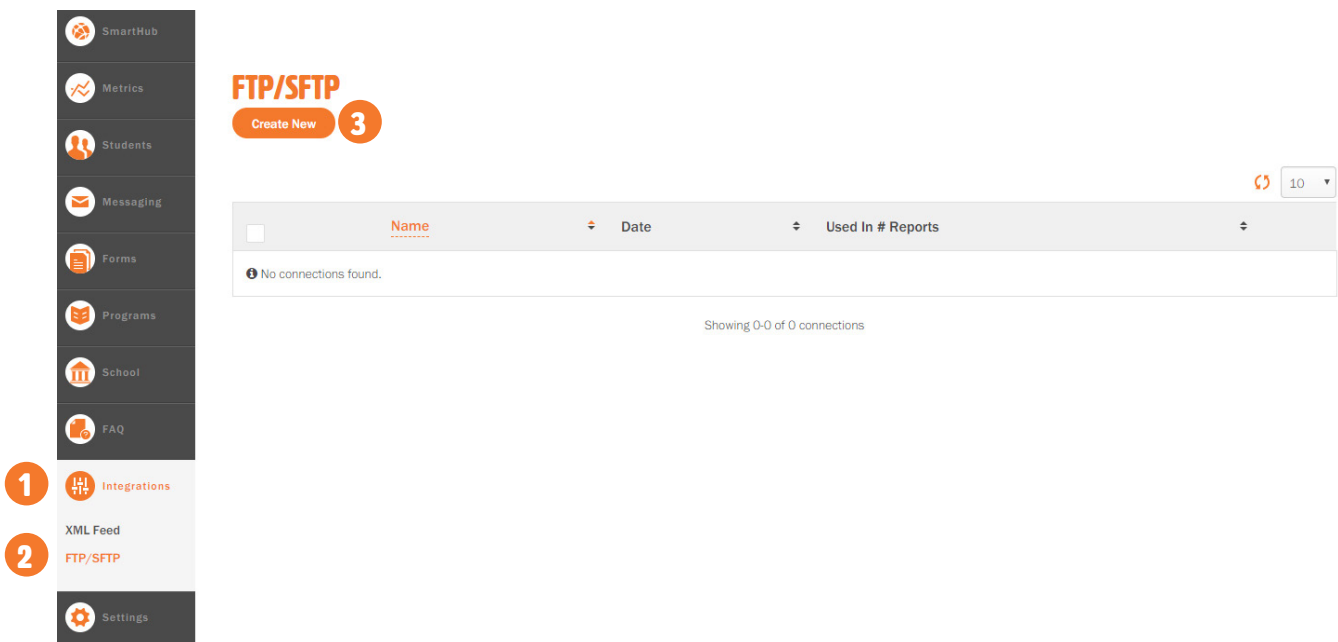
This document will outline how to setup an SFTP or FTP integration with Keystone. This will allow our system to send CSV files with new leads to your SFTP or FTP server. This file will contain all leads since last interval, stored in a table with one row per lead.

Please make sure your system supports import of CSV files, ideally this should be an automatic process where your system monitors a folder for new files and imports them when they arrive.

1

PART 1: SETUP CONNECTION

- 1 When you are logged in to SmartHub, you should see a tab called **"Integration"**. If you are unable to see this tab, please let your account manager know so they can activate it for you.
- 2 Click **"FTP/SFTP"**
- 3 Then click **"Create new"**.



The screenshot displays the SmartHub interface. On the left is a vertical sidebar with navigation icons and labels: SmartHub, Metrics, Students, Messaging, Forms, Programs, School, FAQ, Integrations, XML Feed, FTP/SFTP, and Settings. The 'Integrations' section is highlighted with a red circle and the number '1'. The 'FTP/SFTP' option is highlighted with a red circle and the number '2'. The main content area is titled 'FTP/SFTP' and features a 'Create New' button with a red circle and the number '3'. Below this is a table with columns: Name, Date, and Used In # Reports. The table is currently empty, displaying the message 'No connections found.' and 'Showing 0-0 of 0 connections'. A pagination control shows '10' items per page.



2

1 Fill in the information (Please consult your IT personnel if you are uncertain on the specific settings for your system).

- **Name:** This will be the name of the new connection you are creating (can be anything).
- **Protocol:** These are protocols we are supporting, choose the one that works best with your system. SFTP is recommended if you support both.
- **Host:** This is the address we would use to connect with you. This could be an IP or DNS address.
- **Port:** This will be 22 for SFTP and 21 for FTP.
- **Remote directory:** If you want the leads to be placed inside a folder on your server you can specify this here (Please make sure the folder exists).
- **Authentication:** Make sure you select the process that works best with your system and complete the fields that are appropriate for that process.
- If you selected an authentication process that involves an RSA key, please make sure you add this to your server.
- Please make sure the IP address mentioned on this form has access to your server.

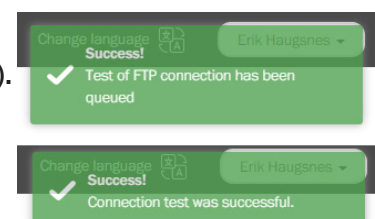
2 Click “Save”.

The screenshot shows the 'FTP/SFTP' configuration page. On the left is a sidebar with navigation links: SmartHub, Metrics, Students, Messaging, Forms, Programs, School, FAQ, Integrations, XML Feed, FTP/SFTP, and Settings. The main content area is titled 'FTP/SFTP' and contains the following fields:

- Name:** A text input field.
- Protocol:** A dropdown menu with 'SFTP - SSH File Transfer Protocol' selected.
- Host:** A text input field.
- Port:** A dropdown menu with '22' selected.
- Remote directory (optional):** A text input field.
- Authentication:** A dropdown menu with 'Password Protected RSA Key' selected.
- User:** A text input field.
- Password:** A text input field.

Below the authentication dropdown, there is a section titled 'Please add this RSA key to your server' containing a large text area with a public key. At the bottom, there is a field 'Open your firewall (if needed) for this IP' with the value '176.74.192.21' entered.

3 Click “Test” and wait for the notification (about 1-2 minutes).





3

PART 2: CREATE REPORT

- 1 Open the “Metrics” tab.
- 2 Click “Create Reports”.
- 3 Type in a name for the report, and filter leads based on the type of program or campus.
- 4 Make sure “Qualified Students as CSV” is selected.
- 5 Save report.

SmartHub

Metrics **1**

Performance

Demographics

Create Reports **2**

Distribute Reports

Students

Messaging

Forms

Programs

School

FAQ

Integrations

Settings

METRICS REPORTS

Existing Reports

Name of the Report	Date	Selection	Recipients
Weekly Lead Export	22.01.2018	All Programs	2

Showing 1-1 of 1 report

Create New Metrics Report

3 Leads as CSV

Choose programs to include:

☒ All Programs

☐ Degrees

☐ Selected Programs

Choose programs from these campuses:

Choose documents to include:

☐ Performance as Excel

☐ Performance as PDF

☐ Demographics as Excel

☐ Demographics as PDF

☐ Combined Performance and Demographics as PDF

☐ Qualified Students as Excel

4 ☒ Qualified Students as CSV

5 Save Report



4

PART 3: DELIVER REPORT

- 1 Enter the Distribute Reports tab.
- 2 Select “FTP/SFTP” in delivery method,
- 3 Select the connection you created in “Connection dropdown”.
- 4 Select the report you created in the “Type of Report dropdown”.
- 5 Finally, select the frequency and time of day for when you want to receive the report.
Please note that the time is Oslo timezone (GMT +2/+1).
- 6 Click “Save Recipient”.

DISTRIBUTE REPORTS
Add New Recipient

Delivery Method	Connection	Type of Report	Frequency	Time of Day
FTP/SFTP	testing	CSV export	Please select frequency	07:00

6 Save Recipient

5

- 1 Find the recipient you just created under “Existing Recipients”.
- 2 Click Edit
- 3 Click “Send File”, this will send a test file to your server to ensure everything is in order.

DISTRIBUTE REPORTS
Edit Existing Recipient

Delivery Method	Connection	Type of Report	Frequency	Time of Day
FTP/SFTP	testing	CSV export	Daily	11:00

3 Send file Save Recipient

The file you can export from the Qualified Students view will have the same layout as the file we will send to you, so you can look at this if you prefer to get started on the import.