



Callidus On-Demand Data File Transfer Process

Version 4.0 – February 2014

Step-by-step walkthrough for Manual File Transfer into Callidus OnDemand

This document describes how to use an SSH File Transfer client on your laptop or PC to upload files manually into Callidus OnDemand.

This process could be implemented by an OnDemand customer who has a business need for uploading data files manually, rather than have them being generated by systems that would use automated file transfer processes.

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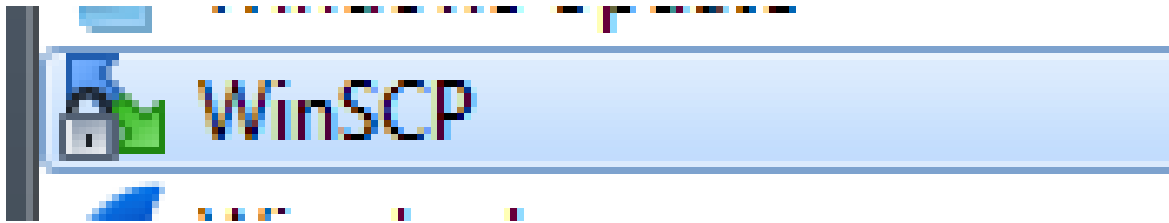
Section 1: Install an SSH/SFTP Client (WinSCP Example)

Install an SSH/SFTP client onto your PC or laptop. Any SSH client application will work, there are several available for free download. Check with your company's internal IT perhaps for assistance or recommendations.

One of the more common free clients for Windows is WinSCP. It's available from <http://winscp.net/eng/download.php> .

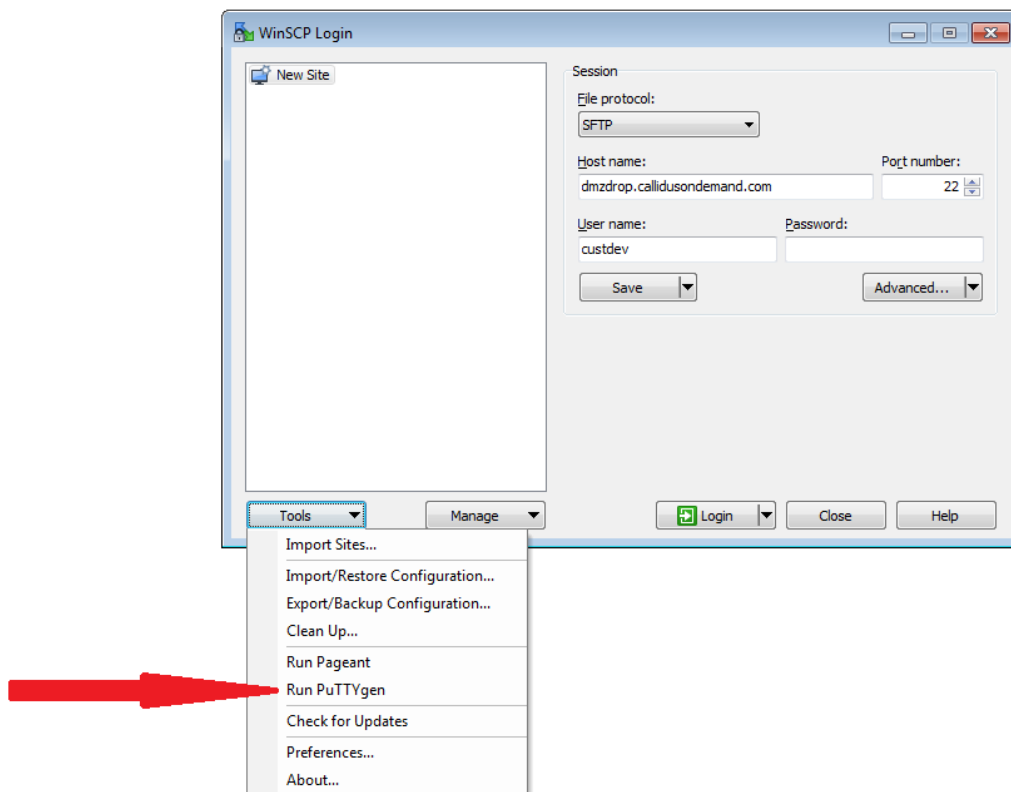
(Note: this link may change or move – search Google or something for "WinSCP free download" for current references if the link referenced here doesn't work).

1. Download the client to your local PC/Laptop.
Find a free download site, and get an installation package you can download:
2. When prompted, let your browser know it's OK to save the *.exe file to your local PC:
3. Pick a location to save it to.
4. Run the Installer program once it's downloaded. You may need to let your Windows security know it's OK to install this application :
5. Proceed with the installation:
6. Once installed, you should see the WinSCP Key Tools and the WinSCP client in your Start → Programs listing:

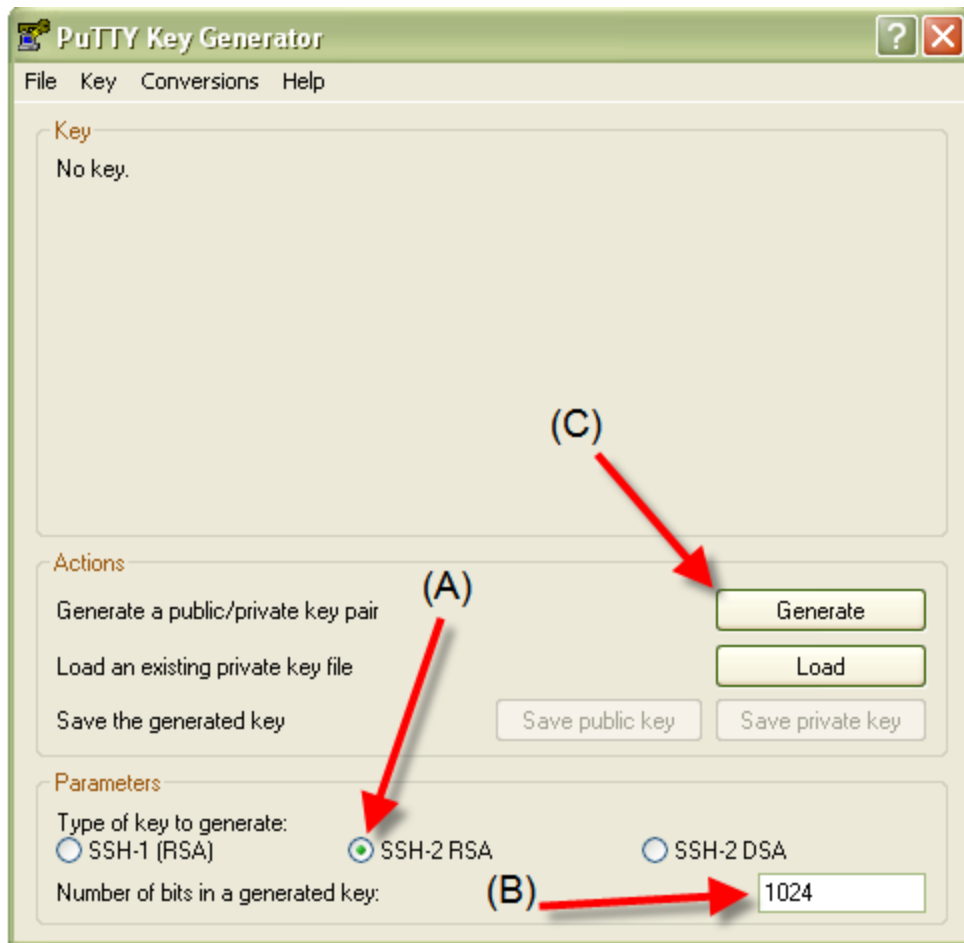


Section 2: Create an SSH Public/Private Key Pair (PuTTYgen example)

Most SSH clients will come with some way to generate SSH2 key pairs. This walkthrough example uses the PuTTYgen tool that comes with the free WinSCP client:

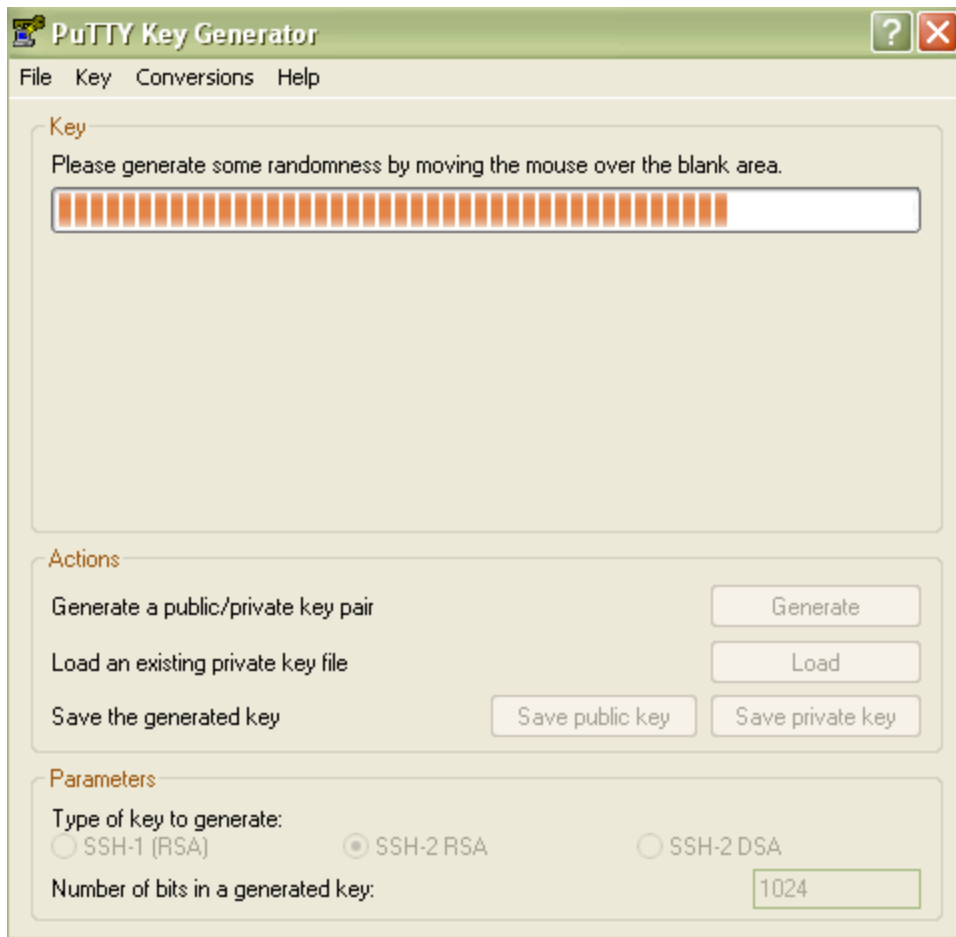


1. Some options need to be specified for your SSH2 key pair. One common set of options you could use (and is shown here by way of example) is to specify a 1024-bit RSA SSH2 key:

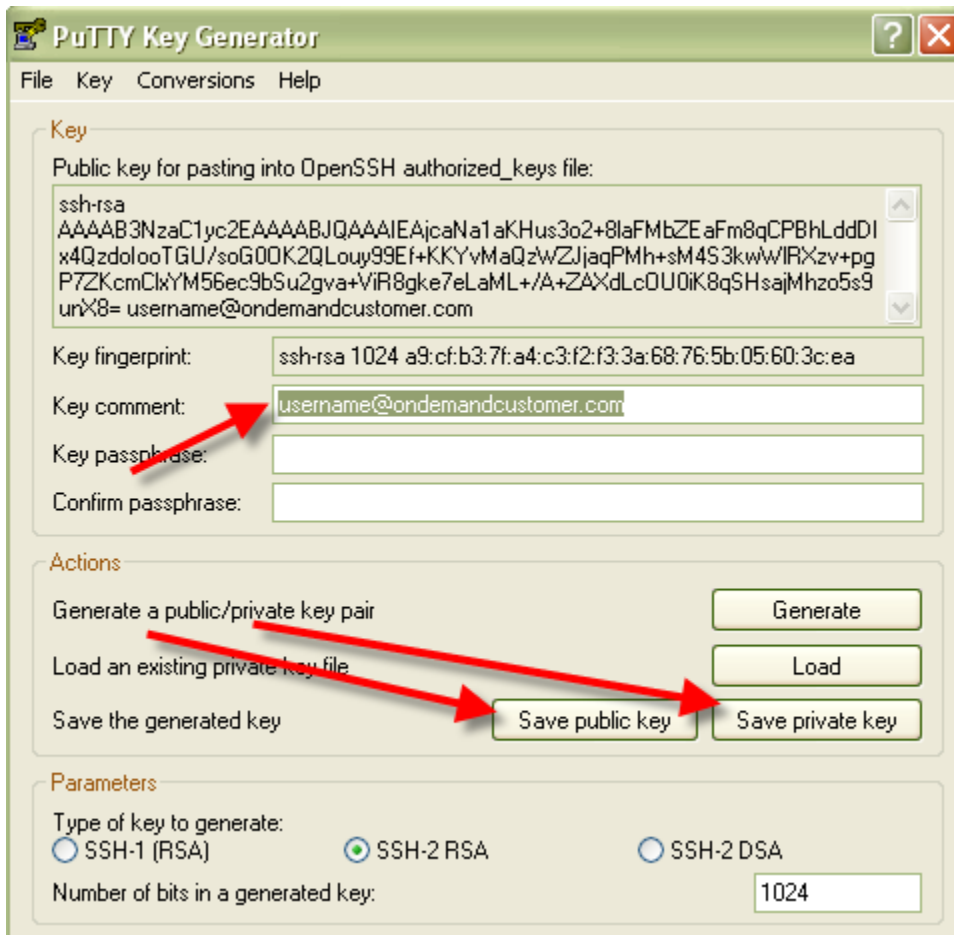


In this screen-print, (A) specifies an SSH-2 key, (B) specifies a 1024-bit key (strength of the key), and then you can click (C) to generate the key pair.

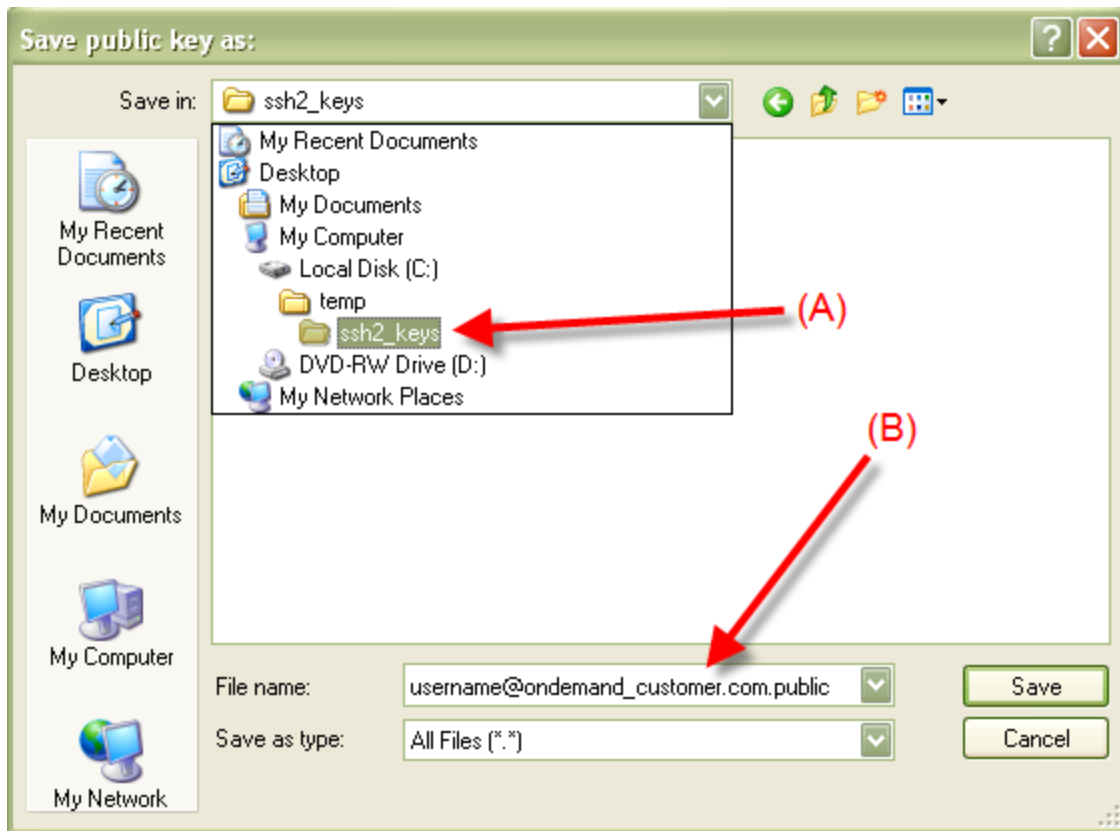
2. You generally will need to provide some random factor, like keystrokes or mouse movement, just follow the instructions:



3. Once the key is generated, specify your email address as the "Key comment", and then save the public and private key pairs:

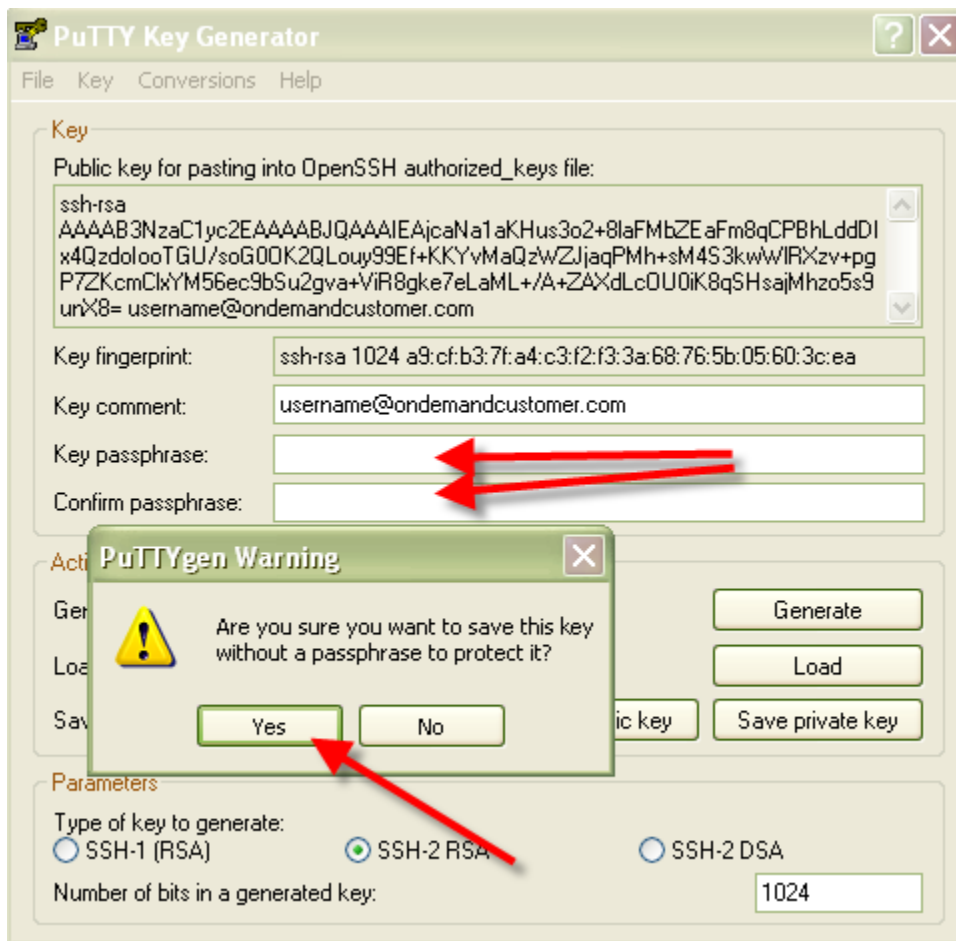


4. Screen-shot of saving the Public Key:

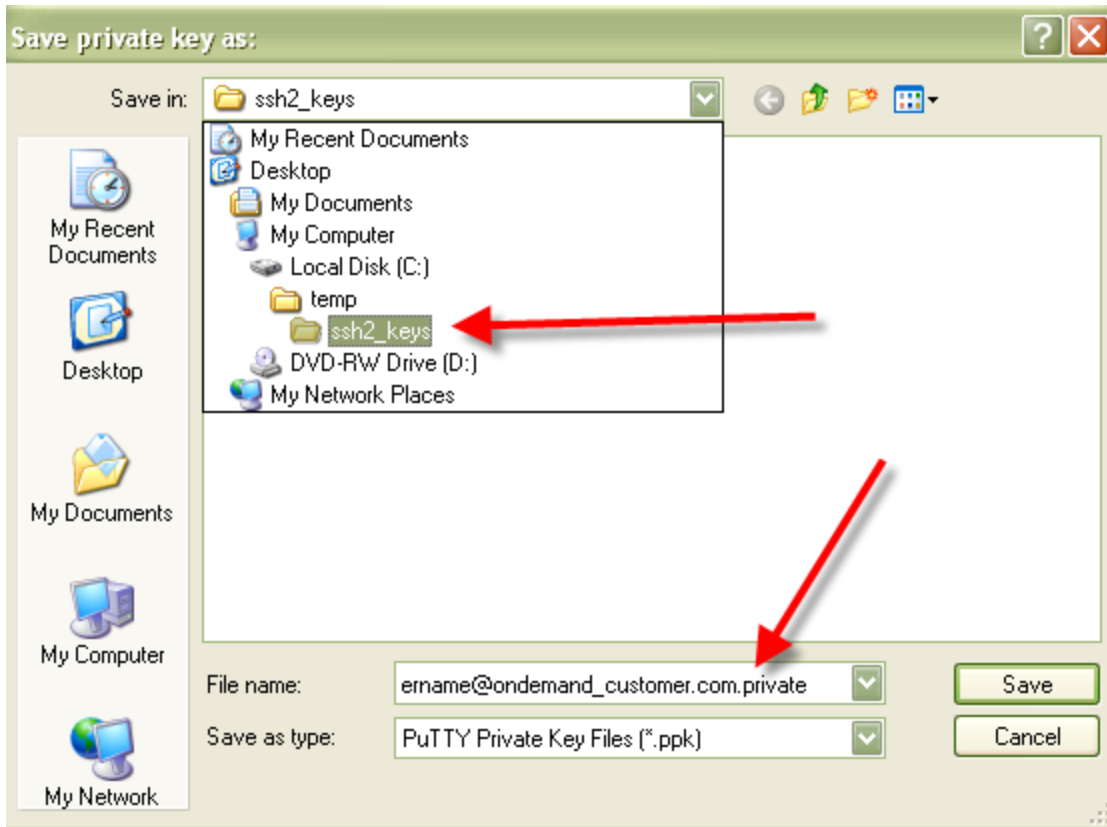


Pick some location where you can find the key later (A) – you'll need it for the client, and specify a filename for the public key (B). Then save it.

5. Save the Private Key into the same location. If you didn't specify a passphrase (a string you'd have to type every time you perform a server connection), you'll be warned that this is not as secure as two-factor authentication. If this isn't a concern for you, then go ahead:



6. Use the same location you did for the public key (it will be by default), and save the key:



7. Close out the PuTTYgen tool, and then open up the Public SSH2 key file that you just created/saved using any text editor (notepad).

The public key you send us will look something like this:

```
---- BEGIN SSH2 PUBLIC KEY ----
Comment: "username@ondemandcustomer.com"
AAAAB3NzaC1yc2EAAAABJQAAAIEAjaNa1aKHus3o2+8laFMbZEaFm8qCPBhLddD
lx4QzdolooTGU/soG0OK2QLouy99Ef+KKYvMaQzWZJjaqPMh+sM4S3kwWIRXzv+p
gP7ZKcmClxYM56ec9bSu2gva+ViR8gke7eLaML+/A+ZAXdLcOU0iK8qSHsajMhzo
5s9unX8=
---- END SSH2 PUBLIC KEY ----
```

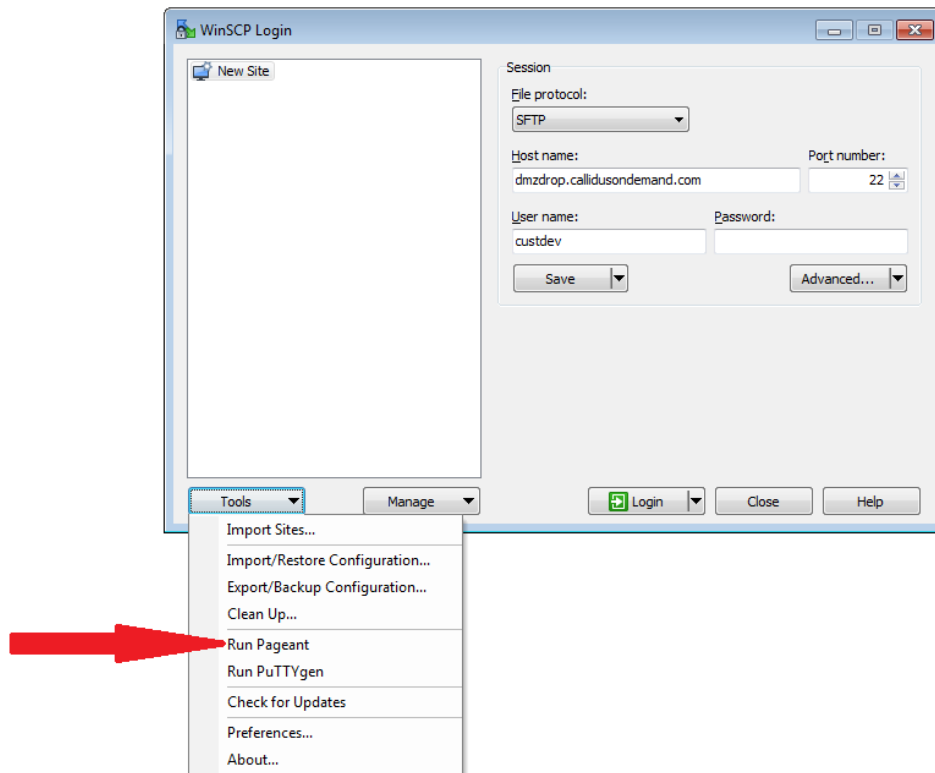
8. Callidus On-Demand Technical Operations will install that key into the account on your dropbox server, and you will use that key to connect for file transfers.

Section 3: Performing an SFTP file transfer to Callidus On-Demand

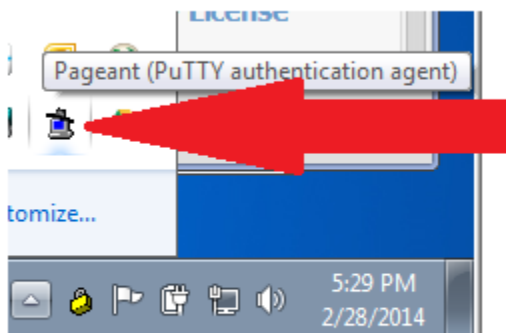
Make sure the Private key is installed and recognized by your SSH client (WinSCP in this example).

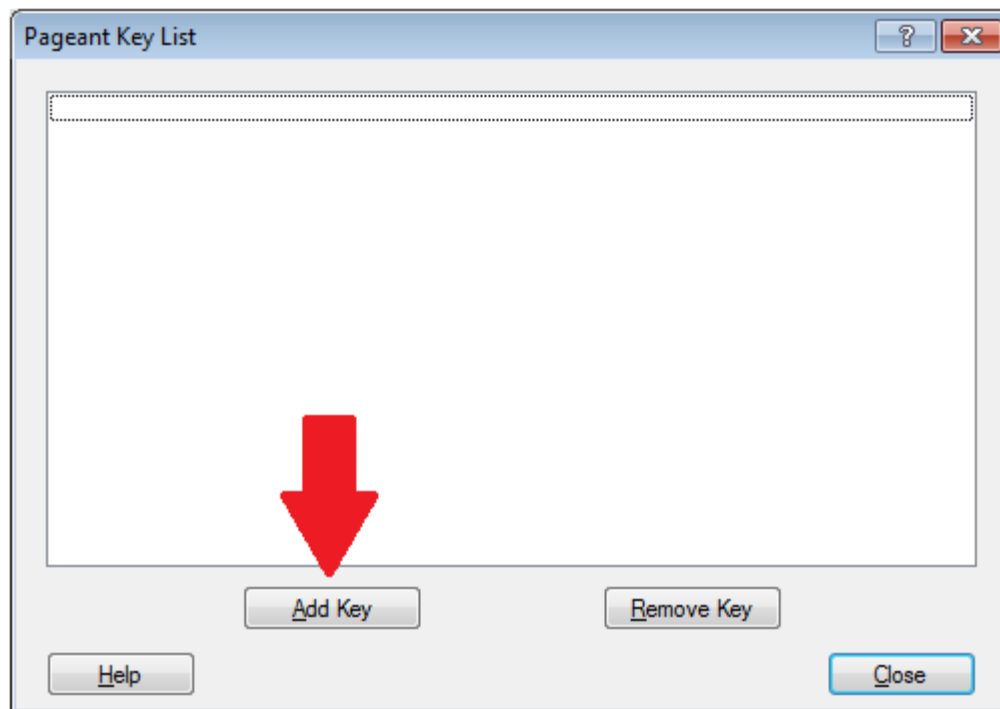
1. Open up your SSH client:

2. Make sure you specify "SFTP" if that's an option for File Protocol.
3. Add Private Key – Run Pageant utility within WinSCP

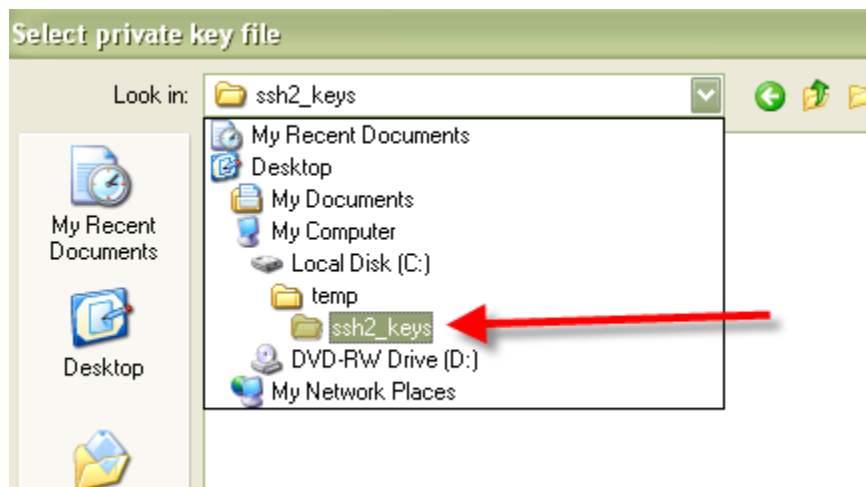


4. You will see the Pageant icon on your Control Panel. Double Click on it and add your Private Key.

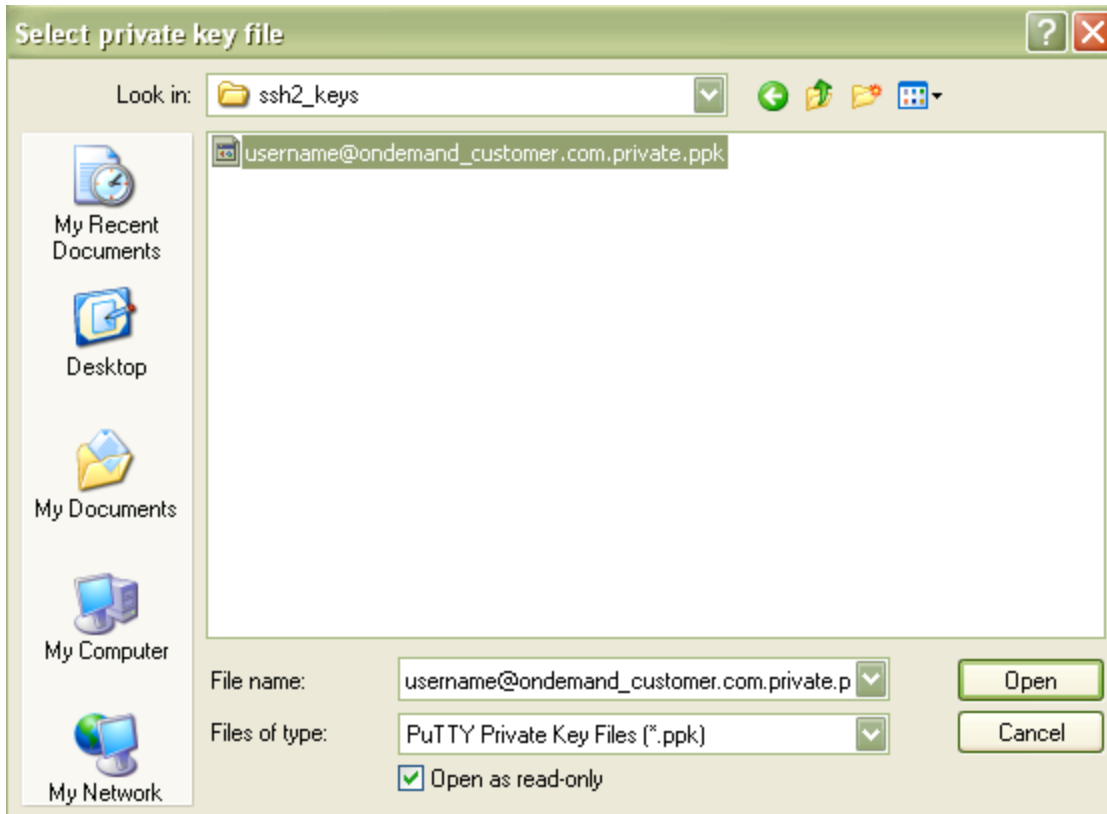




5. Browse to the same folder you used to save the SSH2 key files to:

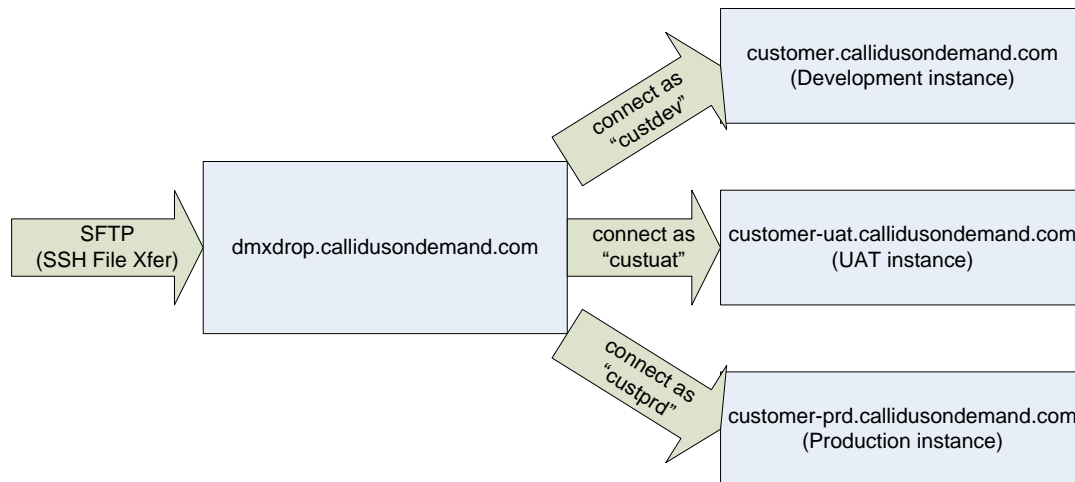


..and you should see the Private key you generated there. Select that key file:

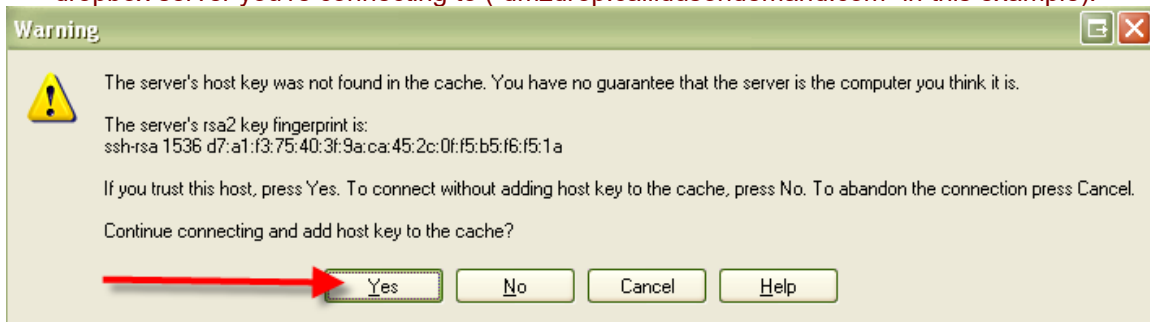


6. Next specify the following details
 - (A) Hostname = "dmzdrop.callidusondemand.com" or "odsftp.callidusondemand.com"
 - (B) Port number = "22"
 - (C) User name = "custdev" (the account you specified in your email to OnDemand Support).
It will be one of the accounts you use for your instance – the DEV, UAT or PRD user account:

custdev	- Development instance
custuat	- UAT instance
custprd	- Production instance
 - (D) Do not put any password (we use the public/private key pair instead of passwords).
 - (E) Then click on "Login" to connect to your dropbox account
7. Here is an overview of how the account you connect to the dropbox (the server "dmzdrop" in this example) is related to your On-Demand DEV, UAT or PRD instance:

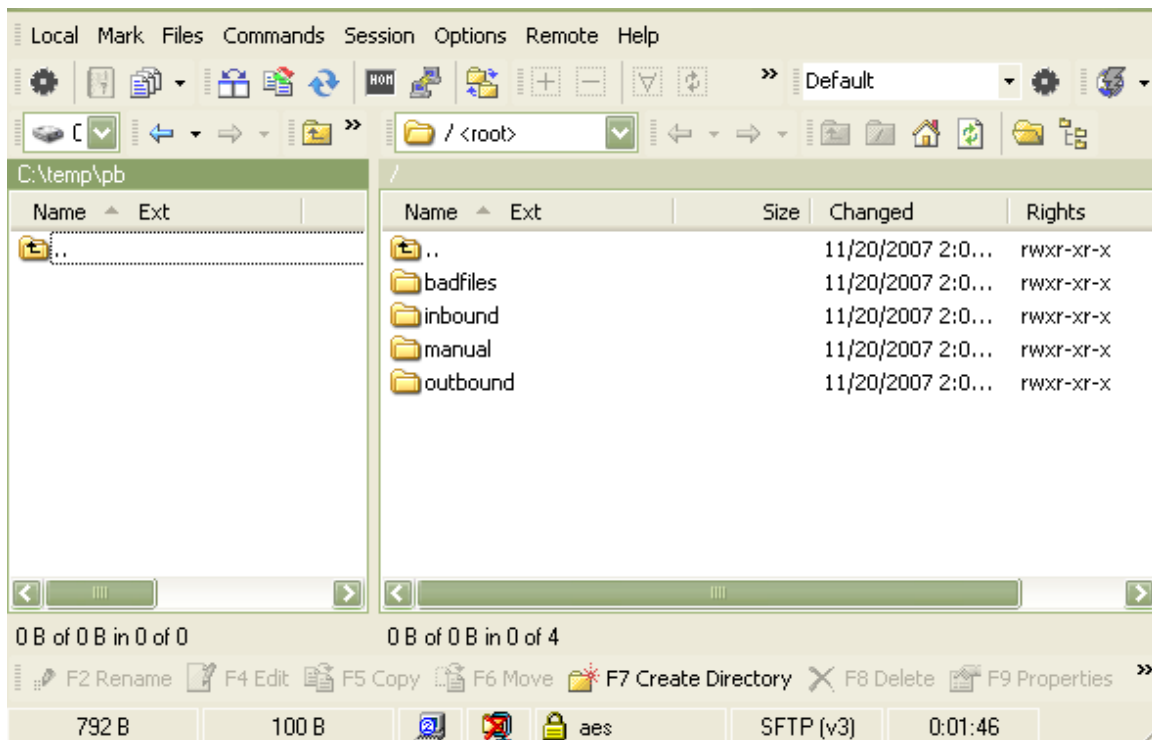


8. The first time you connect, your SSH client will prompt you to confirm the host key of the dropbox server you're connecting to ("dmzdrop.callidusondemand.com" in this example):



Click on "Yes" to add the host key.

9. Once you're connected, you will see the main folder listing on the dropbox server:



➔ **Note:** Do NOT place files at the root level here... it's not a risk or anything, but there is no automated process looking for any files at the root level of where you will connect to. To ensure your uploaded files will be picked up by the automated processes running on the dropbox server, put files in the **"manual"** folder (ignore the "inbound" and "outbound" folders – those are used for automated processes and are not relevant for manually uploaded files):

8. To upload files now, simply open up a Windows file browser, and click-and-drag the files into the manual folder.