

Checklist for Setting Up Secure FTP with PGP or GPG

The checklist below includes the overall steps you need to complete to set up Secure FTP with PGP or GPG.



Setting up SFTP with PGP or GPG requires involvement with your organization's IT department. You may also need to obtain corporate security approval before setting up and using Secure FTP with PGP or GPG.

Consult with your organization's IT department to ensure you have the appropriate access to the Thomson Reuters Secure FTP server.

Send an email request to your Client Service Manager (CSM) indicating that you want to use Secure FTP with PGP or GPG to transfer your trust accounting data files. Be sure to include your Client ID. If you will digitally sign your trust accounting data file, be sure to also include your public key.

After your organization is set up for transferring trust accounting data files, your CSM will supply you with the contact information for a ONESOURCE Trust Tax Product Support Representative who will guide you through the process of transferring a test file using Secure FTP with PGP or GPG. Your Support Representative will supply you with the ID, password and our public key to be used to complete the Secure FTP transfer process.