



## Customer Documentation

### SERVICE IT DIRECT FILE TRANSFER PORTAL

Welcome to Service IT Direct's File Transfer Portal (SITD FTP). This portal will allow you, the customer, to upload files to Service IT Direct **in a secure manner**. This is an upgrade from our old, insecure, FTP server.

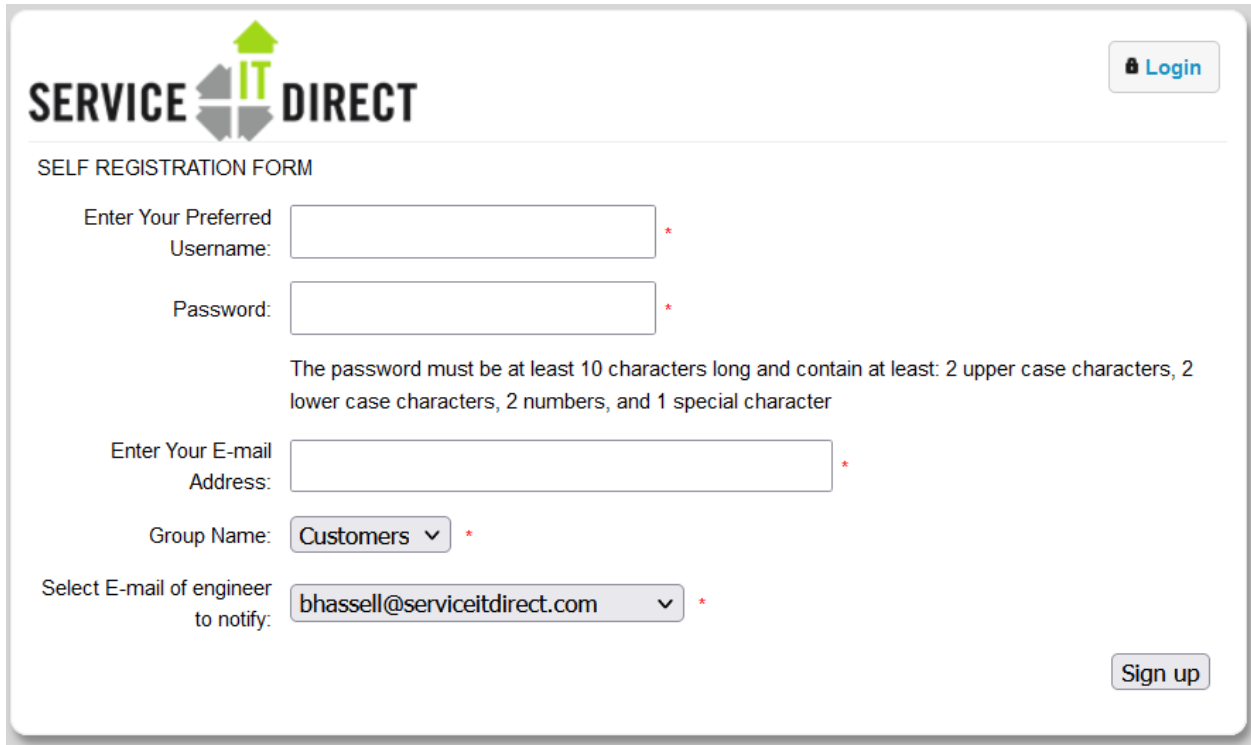
The SITD FTP is completely https-based and allows you to either drag-and-drop or use a file-browser to select a single file, or multiple files, to upload. Once the file(s) have been uploaded the engineer that requested them, which you will select when registering, will be notified so that they can pick them up.

### SELF-REGISTRATION

In order to login to the SITD FTP you must first set up a user id and password by using our self-registration form. To get to the self-registration page, go to <https://transfer.serviceitdirect.com>, then select the "REGISTER FOR AN ACCOUNT" link.

A screenshot of the Service IT Direct File Transfer Portal login and registration page. The page has a green background. At the top, the Service IT Direct logo is displayed. Below the logo, the text "FILE TRANSFER PORTAL" is centered. There are two input fields for "Username" and "Password". Below the password field is a checkbox labeled "Remember Me". A link "I forgot my password" is located below the checkbox. A "Login" button is positioned to the right of the password field. At the bottom, a red rectangular box highlights the link "REGISTER FOR AN ACCOUNT". Below this box is a "SECURED BY positiveSSL" logo.

That link will take you to the following page, which you must fill out in its entirety **as all fields are required**.

A screenshot of the "SELF REGISTRATION FORM" for Service IT Direct. The form is enclosed in a light gray border. At the top left is the Service IT Direct logo. At the top right is a "Login" button with a lock icon. The form contains several input fields: "Enter Your Preferred Username:" with a text box and a red asterisk; "Password:" with a text box and a red asterisk; a password requirement note: "The password must be at least 10 characters long and contain at least: 2 upper case characters, 2 lower case characters, 2 numbers, and 1 special character"; "Enter Your E-mail Address:" with a text box and a red asterisk; "Group Name:" with a dropdown menu showing "Customers" and a red asterisk; and "Select E-mail of engineer to notify:" with a dropdown menu showing "bhassell@serviceitdirect.com" and a red asterisk. At the bottom right is a "Sign up" button.

The username can be a single word or an e-mail address. It should contain only the @ sign, a dash ('-') or an underscore ('\_').

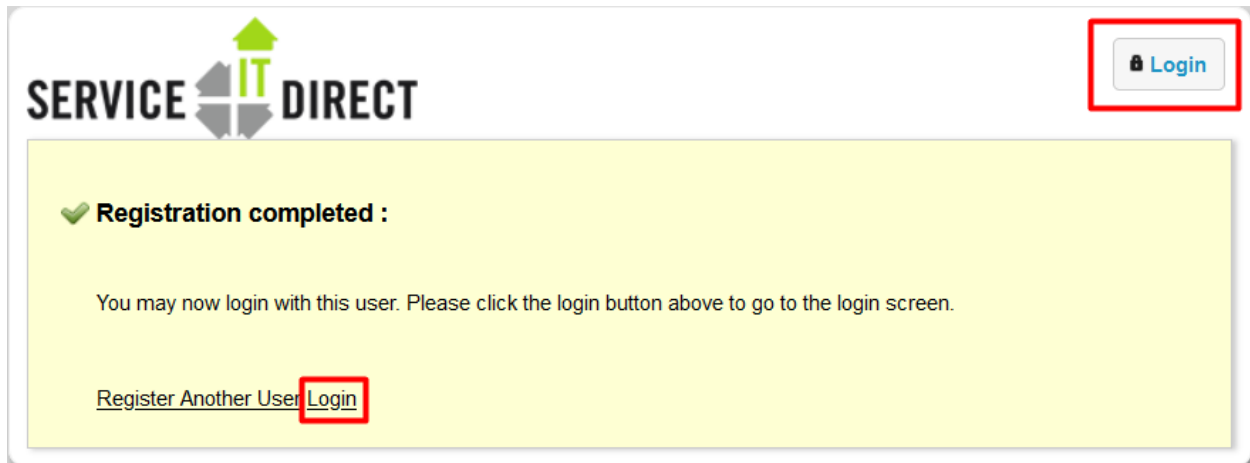
The password must be at least 10 characters long and contain at least 2 upper case characters, 2 lowercase characters, 2 numbers, and 1 special character. **Please note that unsafe password characters are @#%/: \ and should be avoided.**

The only option for the group name is "Customers", so no action is required here.

In the last field, please select the e-mail address of the engineer that requested the files from you. This is the person that will be notified once you upload files.

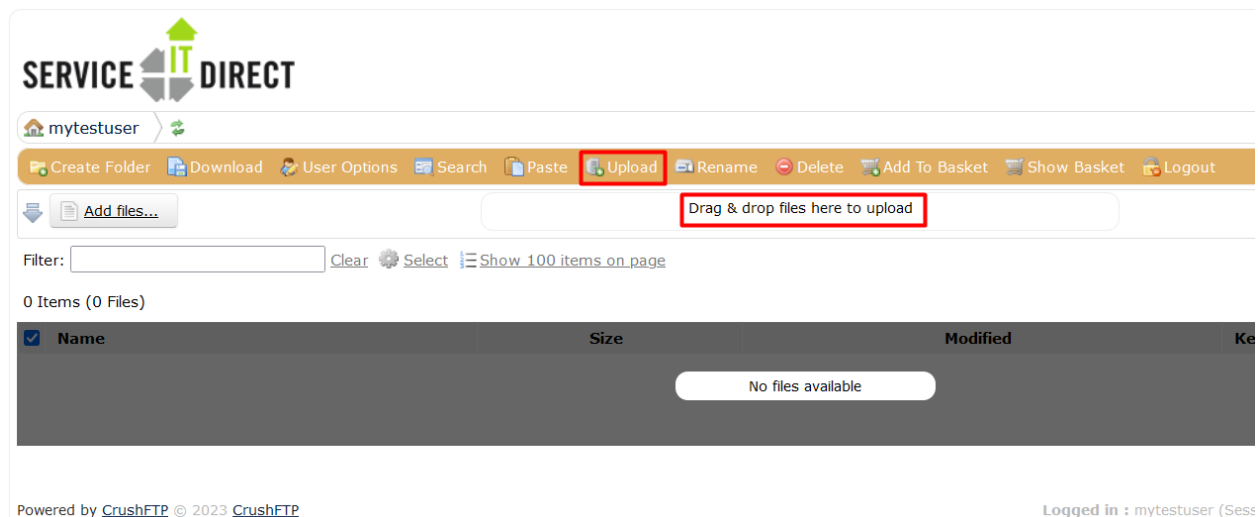
When you have finished filling out the form, please click the "Sign up" button.

When your account has been created, you will see a screen like the following. Please click either the “Login” button or the “Login” word to be taken back to the main SITD FTP login window where you can enter the username and password you just created.



## TRANSFERRING FILES

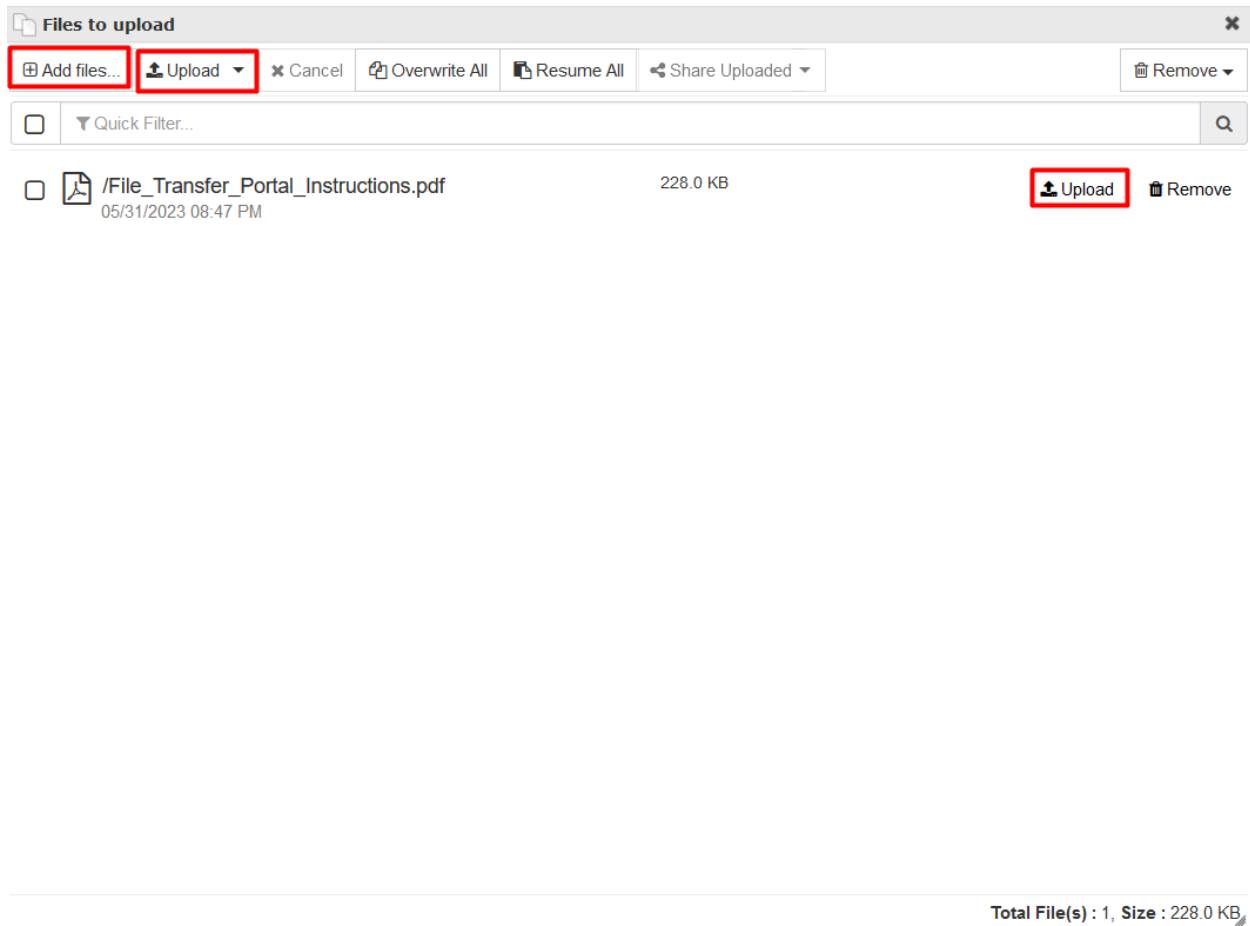
Once you have logged in, you will see the following screen. From here you can upload files, download anything you have uploaded, remove files, or rename files.



To upload files you can either click on the “Upload” button or drag-and-drop files in the appropriate area.

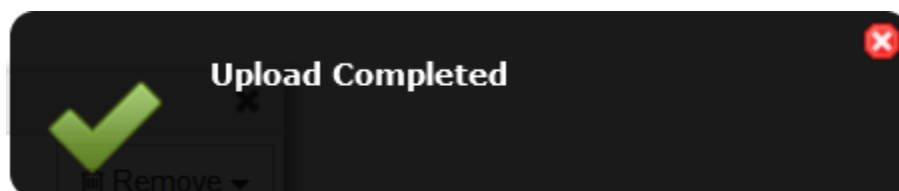
If you drag-and-drop file(s), the window below will open with the file(s) you selected listed. If you just click the “Upload” button the same window will open, but without any files listed.

In order to add file(s) to be uploaded you must click the “Add Files” button.

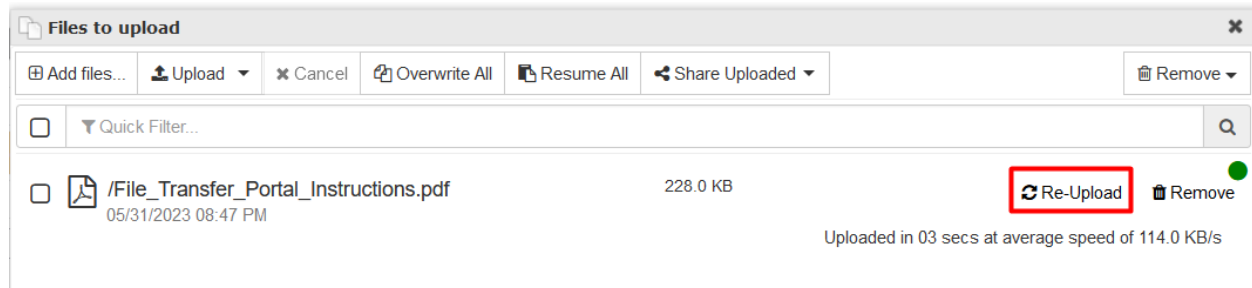


Once you have all the files listed that you want to upload, you can click either the “Upload” button at the top of the window (next to the “Add files”) to upload all files, or you can click “Upload” next to each file to upload them individually.

Once all files have been uploaded, you will get the following in the top right corner of the screen.



You will also see “Re-Upload”, rather than “Upload” next to the filename.



If you are finished uploading you can click the ‘x’ to close the file upload window, and then log out of the SITD FTP.

If you have any questions or problems with the SITD FTP please email your engineer and they will forward them to the appropriate person.