

SFTP Access for Vendor

Training Document

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Overview

The SFTP (Secure File Transfer Protocol) access provides users with a secure and efficient way to upload FTP/EDI documents in PIEE. It replaces the need for submitting the DD 2875 Form and ensures that all file transfers are encrypted and protected. With this access, authorized users can quickly and safely upload sensitive information, maintaining compliance with necessary security standards and streamlining the document upload process.

Who has Access

All Vendor have access to add SFTP Credentials.

Registration

Vendor with a CAGE Code can self-register for the SFTP Access role (refer to **Vendor Registration**). For existing PIEE Accounts, add the role instead. One SFTP Access can cover multiple CAGE Codes.

The screenshot displays the 'Registration Steps' interface for the 'Procurement Integrated Enterprise Environment' (PIEE). The interface is divided into a left sidebar with navigation steps and a main content area for role selection.

Registration Steps:

1. Registration Home
2. Authentication
3. Security Questions
4. Profile
5. EB POC / Company
6. Roles
7. Justification
8. Summary
9. Agreement

Roles Selection Process:

- Step 1:** Select the appropriate Application from the list below. The dropdown menu shows 'PIEE - Procurement Integrated Enterprise Environment'.
- Step 2:** Select One or More Roles from the list below (Ctrl+Click). The dropdown menu shows 'Admin Roles for PIEE', 'Contractor Administrator', and 'SFTP Access'. An 'Add Roles' button is visible.
- Step 3:** Click 'Add Roles'.
- Step 4:** Fill out the required information for the applicable applications.

Roles Summary Table:

Application	Role	Location Code / CAGE*	Extension	Group	Action
PIEE	Admin SFTP Access	06481	N/A	06481	Delete
PIEE	Admin SFTP Access	3D135	N/A	3D135	Delete
PIEE	Admin SFTP Access	06441	N/A		Delete

Instructions:

- 1. The Contractor Administrator and Government Administrator roles are under the PIEE - Procurement Integrated Enterprise Environment application under [Step 1].
- 2. If you need access to any other applications, Repeat Steps 1 to 4 again.
- 3. You can view a list of all PIEE roles and their descriptions and functions in the PIEE Role List Matrix.

Navigation: Next, Previous, Save Registration, Help.

! Symbol Indicates situational entry, at least one is required.
* Asterisk Indicates required entry.

NOTE: The CAGE Codes presented in above screenshot are for purposes of example only. All users must utilize their own CAGE Code that is assigned to them.

**SFTP Access
Workflow
Process**

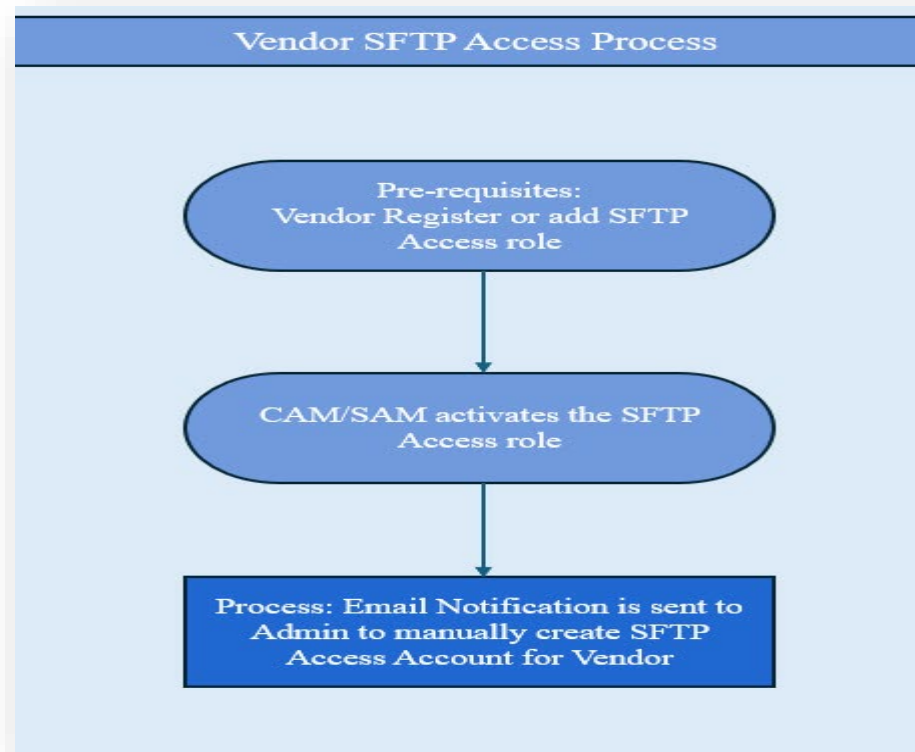
Prerequisites:

1. **Vendor Registration:** The vendor must register with the SFTP Access role.
2. **Role Activation:** CAM or SAM must approve the SFTP Access role.

Process:

3. **Email Notification:**

- Vendor SFTP Access role activation triggers an automatic email to the admin.
- The email instructs the admin on manual SFTP account creation for the Vendor.



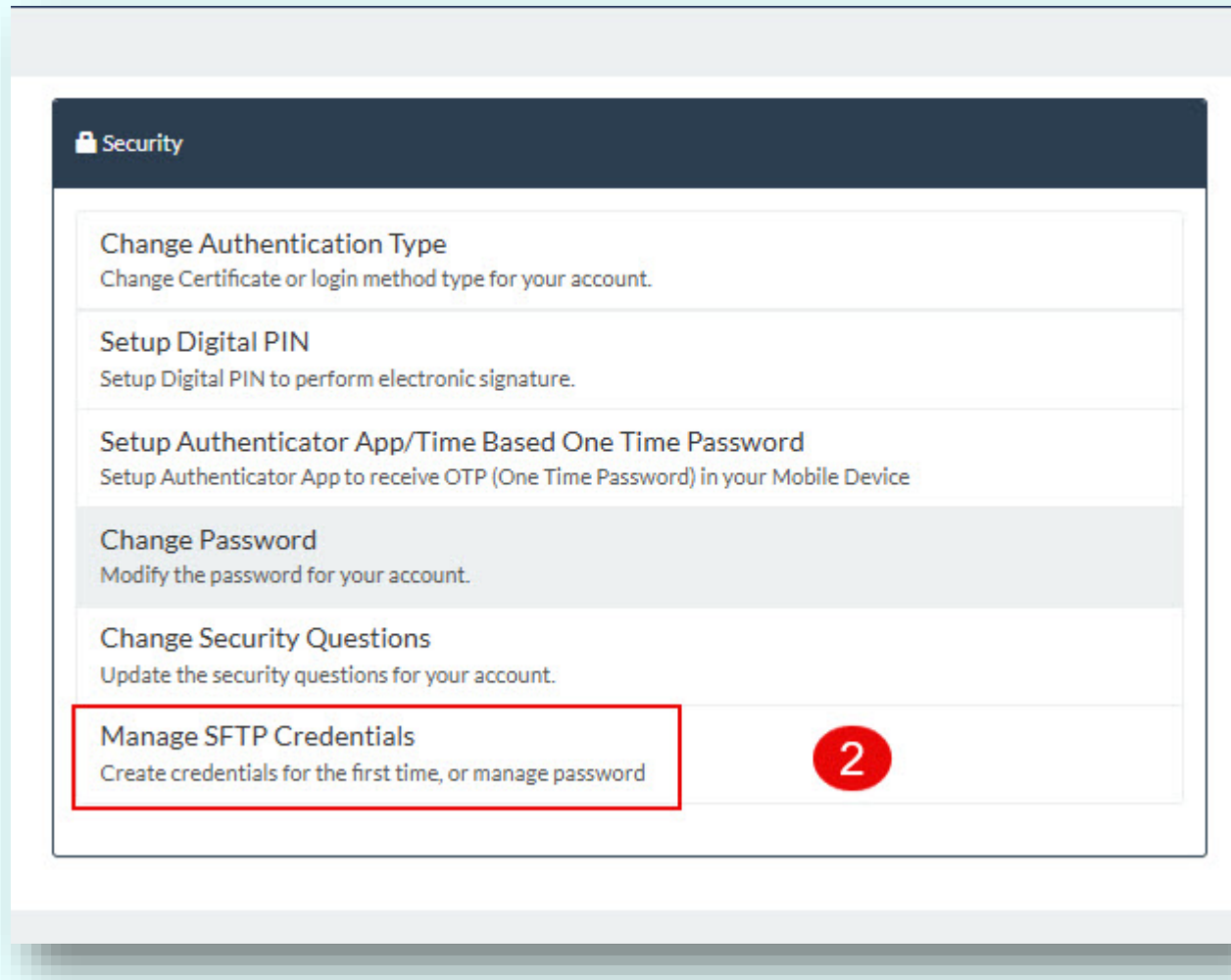
Manage SFTP Credentials

Create SFTP User ID and password (a one-time process) or manage their existing password for the SFTP server.

1. Log into **PIEE**, then click the **My Account** button at the top of the window.



2. The Manage SFTP Credentials options is available on the My Account screen, select the **Manage SFTP Credential** link.



3. The **Create SFTP Access Credentials** screen displays, create new credentials or manage existing password.
 1. A drop-down list appears with the question, *"How will you be accessing the SFTP File Transfer Service?"* The default selection is **User ID\Password**.
 2. The **User ID** field defaults to the user's first and last name. The user may enter a custom User ID, following the provided User ID rules and guidelines.
 3. The user enters a **password**, ensuring it meets the Password Guidelines (e.g., minimum length, complexity requirements, etc.), and then confirms it in the **Password Confirmation** field.

Create SFTP Access Credentials

How will you be accessing the SFTP File Transfer Service? *

User ID \ Password

User ID Rules

- Minimum 8 Characters.
- May Contain ONLY the following special characters ~ ! # \$ _ [] ONLY if a human Systems are NOT allowed to use any special characters
- May NOT contain spaces.
- Must not already be registered in the Procurement Integrated Enterprise Environment.

Password Rules

- Must be different then the current Procurement Integrated Enterprise Environment User ID Password
- Minimum 15 characters
- Maximum 40 characters
- Must contain at least 1 capital letter
- Must contain at least 1 lower case letter
- Must contain at least 1 number
- Must contain at least 1 special character
- Entered passwords must be different from last 10 passwords used
- Cannot be changed within 24 hours
- Entered passwords cannot be the same as User ID

User ID *

Password *

Password Confirmation *

✓ Submit ← Cancel

*Asterisk indicates required entry.
!! Symbol indicates situational entry, at least one is required.

Complete the steps, then select the **Submit** button to finalize your SFTP Credentials.

Buttons:

- *Submit*
- *Cancel*