# Chapter 4: User Management Application

## Overview

**Introduction**

The **User Management** application allows you to view, create, modify, change passwords and delete Control Center users for your organization; this chapter will explain how to perform these activities.

**In this Chapter**

This chapter contains the following topics:



*Continued on next page*

# Overview, continued

**In this Chapter** (continued)

# User List Screen

**Introduction**

The **User List** screen gives a listing of all the users that have been created under your Control Center Enterprise ID.

From this screen, you can view, create and/or delete user accounts within Control Center system.

# User List/Field & Descriptions

**Overview**

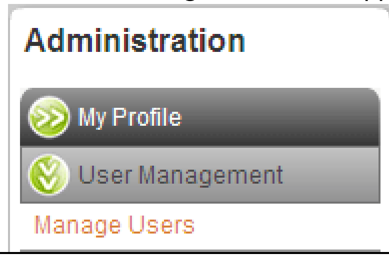
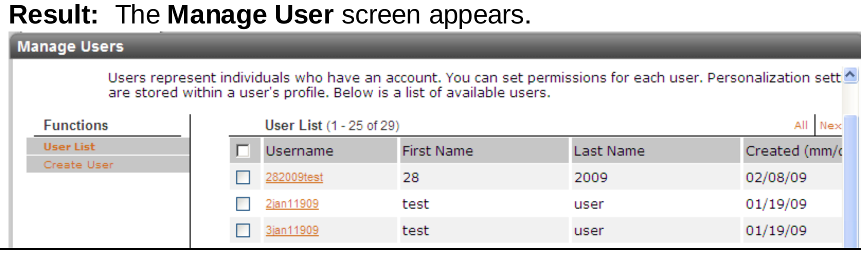
The table below describes the fields and buttons displayed on the **User List** screen.

| Field Name | Description |
|---|---|
| **User Name** | This field displays the user's unique identifier that allows them to access the Control Center application. |
| **First Name** | This column displays the user's first name for each user in the list. |
| **Last Name** | This column displays the user's last name for each user in the list. |
| **Created (mm/dd/yy)** | This column displays the date each user account was created. |
| Delete Selected | After clicking the checkbox for each desired user account, this button allows you delete your user(s). |

# Viewing the User List

**Procedure**

Follow the steps in the procedure below to **view** the **User List** details.

| Step | Action |
|---|---|
| 1 | From the **Home** page, click on the **User Management** link on the left hand **Administration** section.<br><br>**Result: Manage Users** link appears<br> |
| 2 | Next click on the **Manage Users** link<br><br>**Result:** The **Manage User** screen appears.<br> |

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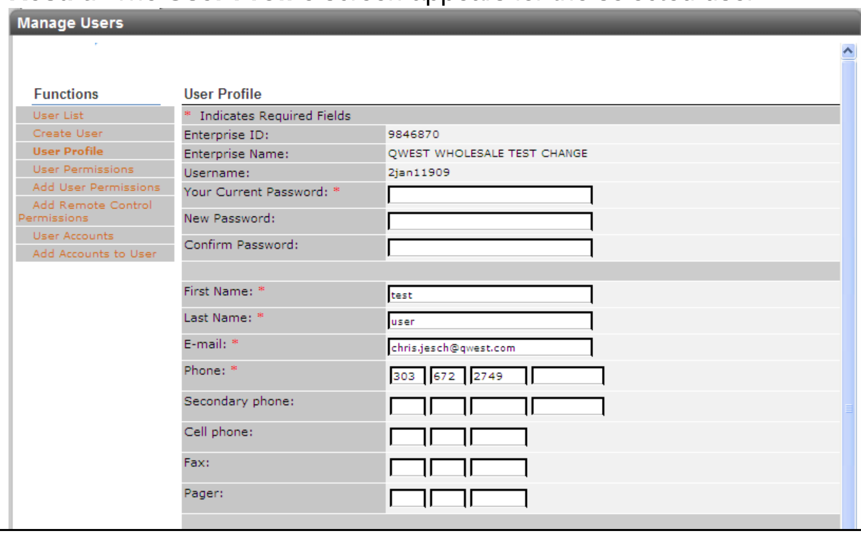
# Viewing the User List, continued

**Procedure** (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>From the User List screen, click on the User Name to view more detailed information.<br><br>Result: The User Profile screen appears for the selected user.<br>



</td></tr>
</table>

# User Approvals Screen

**Introduction**

The **User Approvals** screen gives a listing of all the users that have self registered under your Control Center Enterprise ID and are on hold

From this screen, you can view, activate, and/or delete On-hold users that have self registered and awaiting approval.

# User Approvals/Field & Descriptions

**Overview**

The table below describes the fields and buttons displayed on the **User List** screen.

| Field Name | Description |
|---|---|
| **User Name** | This field displays the user's unique identifier that allows them to access the Control Center application. |
| **First Name** | This column displays the user's first name for each user in the list. |
| **Last Name** | This column displays the user's last name for each user in the list. |
| **Created (mm/dd/yy)** | This column displays the date each user account was created. |
| Cancel | Click on this button to cancel request and go back to previous screen |
| Activate | Click on this button to activate user. Once user is activated you will need to assign permissions, add Remote Control permissions, and add accounts |
| Delete | Click on this button to delete user |

# Viewing User Approvals

**Procedure**

Follow the steps in the procedure below to **view** the **User Approval List** details.

| Step | Action |
|---|---|
| 1 | From the **Landing** page, click on the **User Approvals** link on the left hand **Administration** section.<br><br>**Result:** The **User Approvals** link appears.<br> |

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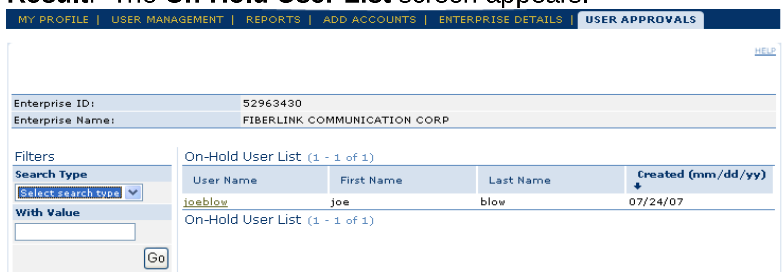
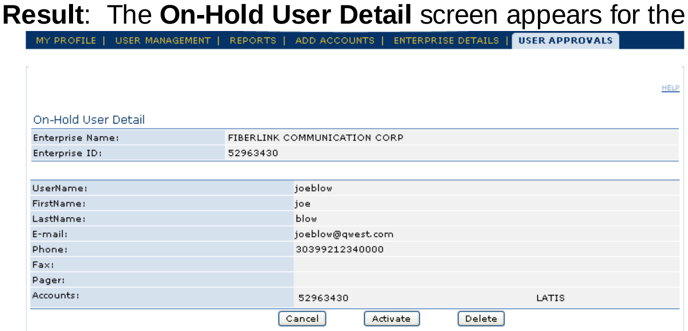
# Viewing the User List, continued

**Procedure** (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click on the User Approvals application.<br><br>Result: The On-Hold User List screen appears.<br>

</td></tr>
<tr><td>3</td><td>From the User List screen, click on the User Name hyperlink to view more detailed information.<br><br>Result: The On-Hold User Detail screen appears for the selected user.<br>

</td></tr>
</table>

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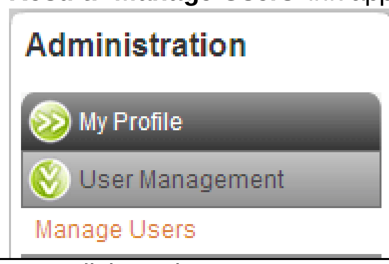
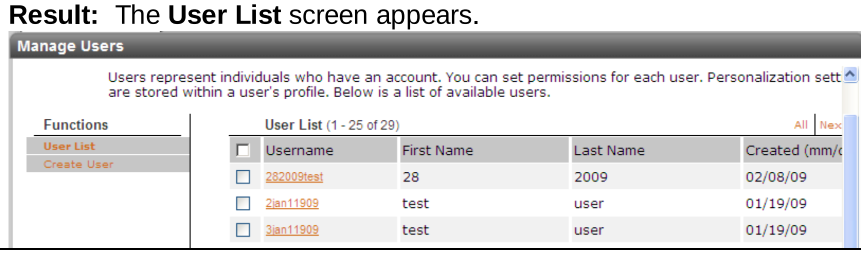
<table>
<tr>
<td>4</td>
<td>Click Activate if you want to activate the user.<br>A pop up will appear asking “Are you sure, you want to Activate this user” Click OK button if you would like to Activate or Cancel if you do not want to.<br><br>**Result:** A confirmation page appears, indicating the success or failure of the addition.<br><br></td>
</tr>
<tr>
<td>5</td>
<td>Click Delete if you do **not** want to activate the user<br><br>**Result:** A confirmation page appears, indicating the success or failure of the addition.<br><br></td>
</tr>
</table>

# Deleting a User(s)

**Procedure**

Follow the steps in the procedure below to **remove** an existing **user account** from your Control Center Enterprise ID.

**Note**: As a result of deleting a user in the Control Center Administration module, the user's ability to access the Remote Control™ application will also be removed. CSA's will be able to delete other CSA's but will not be allowed to delete oneself.

| Step | Action |
|---|---|
| 1 | From the **Home** page, click on the **User Management** link on the left hand **Administration** section.<br><br>**Result: Manage Users** link appears<br> |
| 2 | Next click on the **Manage Users** link<br><br>**Result:** The **User List** screen appears.<br> |

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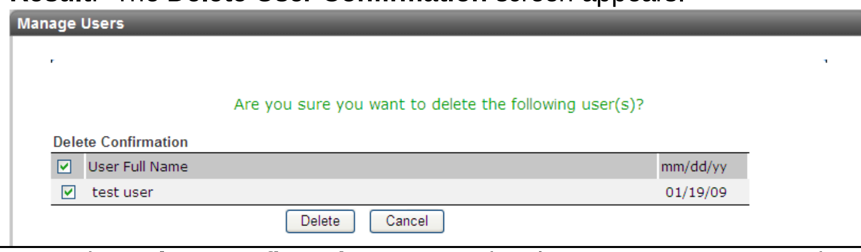
# Deleting a User(s), continued

**Procedure** (continued)

| Step | Action |
|---|---|
| 3 | From the **User List** screen, select the checkbox next to each user that you would like to remove from the system. |
| 4 | Click Delete Selected.<br><br>**Result**: The **Delete User Confirmation** screen appears.<br> |
| 5 | From the **Delete Confirmation** screen, deselect any user accounts that no longer need removed (if applicable).<br><br>**Note**: If you decide you do not want to remove any of the user accounts, click Cancel to return to the **User List** screen without making any changes. |

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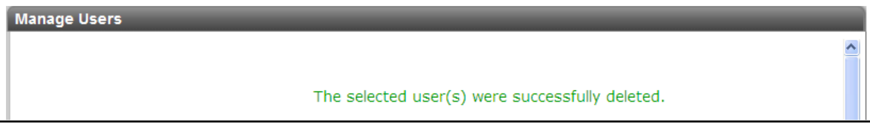
# **Deleting a User(s),** continued

**Procedure** (continued)

| Step | Action |
|---|---|
| 6 | Click  .<br><br>**Result**: The system removes the selected user account(s). The **User List** screen appears, displaying a message indicating the success or failure of the deletion.<br>  |

# Create User

**Introduction**

The **Create User** screen allows you to generate a new user account in the Control Center system.

**Note:** As a result of creating a user in the Control Center Administration module, the user will also be granted access to the Remote Control portal.

When creating a user in Control Center you will need to remember assign permissions to both the Control Center and Remote Control applications.

In addition, as the **C**ustomer **S**ystem **A**dministrator (**CSA**) you will have access to view inventory under your user access; however you must assign accounts to each user to in order for a non-**CSA** user to view inventory.

# Create User/Fields & Descriptions

**Overview**

The table below describes the fields and buttons displayed on the **Create User** screen.

| Field Name | Description |
|---|---|
| **Enterprise ID** | This field identifies the unique Control Center Enterprise ID that will be associated to the new user's account/profile. |
| **Enterprise Name** | This field provides the name that will be associated to the Control Center Enterprise ID for the new user's account/profile |
| **User Name** | This *required* field allows you to assign a unique username to be used by the new user when accessing the Control Center application.<br><br>**Note:** Please do not use uppercase letters in this field. |
| **New Password** | This *required* field allows you to assign the new user's initial password. |
| **Confirm Password** | This *required* field allows you to re-enter the new password for a system validation that verifies the new user's **"Confirm Password"** matches the **"New Password"** field. |
| **First Name** | This *required* field shall contain the new user's first name. |
| **Last Name** | This *required* field shall contain the new user's last name. |
| **E-mail** | This *required* field shall contain the e-mail address at which the new user can be reached. |
| **Phone** | This *required* field shall contain the telephone number at which the new user can be reached. |
| **Secondary Phone** | This *optional* field shall contain the secondary telephone number at which the new user can be reached. |
| **Cell Phone** | This *optional* field shall contain a cellular phone number at which the new user can be reached. |

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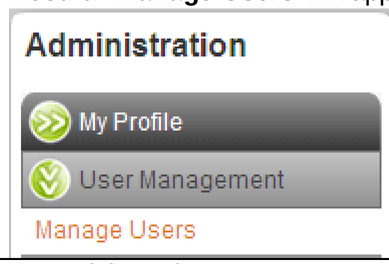
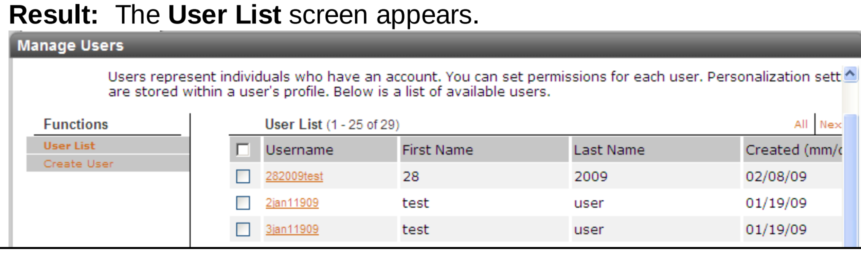
# Create User/Fields & Descriptions, continued

| Field Name | Description |
|---|---|
| **Fax** | This *optional* field may contain the telephone number at which the new user can receive FAX transmissions. |
| **Pager** | This *optional* field may contain the telephone number at which the new user can be paged. |
| **Time Zone** | This *required* field provides a drop-down list that allows you to select the time zone in which the new user resides. |
| **Street** | This *optional* field may contain the street address of the new user's workplace, if you choose to make such information available. |
| **City** | This *optional* field may contain the new user's workplace city, if you choose to make such information available. |
| **State** | This *optional* field may contain the new user's workplace state, if you choose to make such information available. |
| **Zip** | This *optional* field may contain the new user's workplace ZIP or postal code, if you choose to make such information available. |
| **Customer System Admin** | These radio buttons identify whether or not you want the new user to have administrative rights within the Control Center application.<br><br>**Note**: Be cautious when assigning user system administration permissions. Users with Admin permissions can edit any aspect of your account within the Control Center system. |
| Create User | This button allows you to save and create the new user account.<br><br>**Note**: If the user account was created successfully the system will display the User Profile screen with a success message; otherwise the system will display an error message indicating why the user account was not created. |
| Cancel | This button allows you to undo any changes you may have made in the create user screen. |

# Viewing Create User

**Procedure**

Follow the steps in the procedure below to **view** the **Create User** screen.

| Step | Action |
|---|---|
| 1 | From the **Home** page, click on the **User Management** link on the left hand **Administration** section.<br><br>**Result: Manage Users** link appears<br> |
| 2 | Next click on the **Manage Users** link<br><br>**Result:** The **User List** screen appears.<br> |

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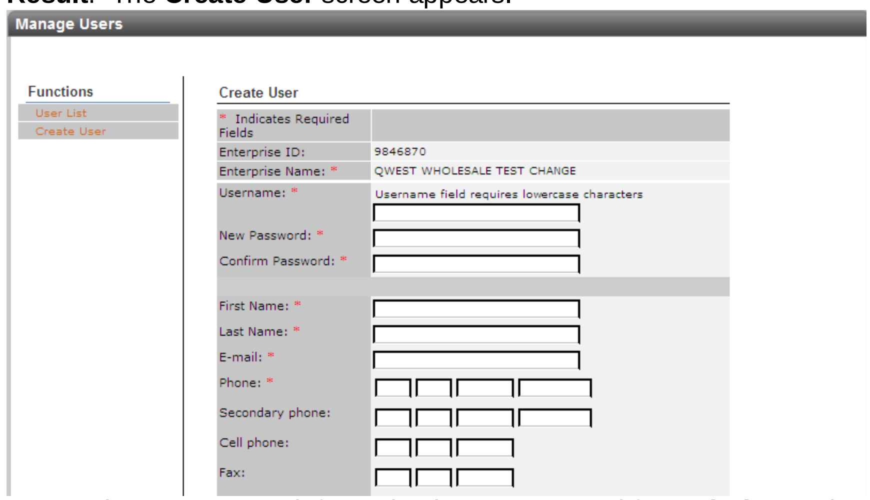
# Viewing Create User, continued

**Procedure** (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>From the User List screen, click on the Create User function.<br><br>Result: The Create User screen appears.<br>

<br>Note: The user contact information is pre-populated for Ordering and Billing Dispute resolution based on the information that is provided in the User Profile screen.</td></tr>
</table>

# Creating a User Account

**Procedure**

Follow the steps in the procedure below to **create** a new **user account(s)** under your Control Center Enterprise ID.

| Step | Action |
|---|---|
| 1 | From the **Create User** screen, enter the desired value in the **User Name** field for the user account.<br><br>**Note**: The **User Name** must be 4 or more unique characters in length and not already exist in the Control Center system. |
| 2 | In the **New Password** field, enter the desired **password** for the user account.<br><br>**Note**: The **New Password** must contain 1 numeric or symbol value and be 8 or more characters in length. |
| 3 | In the **Confirm Password** field, re-enter the new **password** value into the Confirm Password field.<br><br>**Note**: The **Confirm Password** must match the New Password entered. |
| 4 | In the **First Name** field, enter the user's **first name**. |
| 5 | In the **Last Name** field, enter the user's **last name**. |
| 6 | In the **E-mail** filed, enter a valid value for the user's **email address** including the @ symbol and .com, .net, etc. extension. |
| 7 | In the **Phone** field, enter the user's contact **telephone number**.<br><br>**Note**: The NPA/NXX must be valid. |
| 8 | In the **Secondary Phone** field (if applicable), enter the user's **secondary telephone** number. |
| 9 | In the **Cell Phone** field (if applicable), enter the user's **cellular phone** number. |
| 10 | In the **Fax** field (if applicable), enter the user's contact **fax number**.<br><br>**Note**: The Fax Number field is optional for user creation, if entered the NPA/NXX must be valid. |
| 11 | In the **Pager** field (if applicable), enter the user's contact **pager number**.<br><br>**Note**: The Pager number field is optional for user creation, if entered the NPA/NXX must be valid. |
| 12 | From the **Time Zone** drop down menu (if applicable), select the user's **time zone** in which they currently reside. |
| 13 | In the **Street** field (if applicable), enter the **street address** of the user's workplace.<br><br>**Note**: The Street field is optional and not required to create a new user account. |

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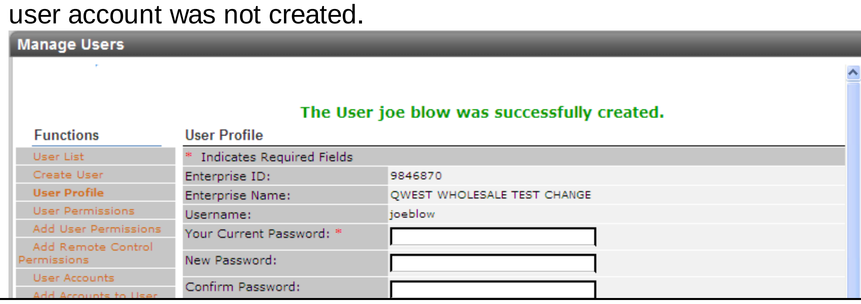
# Creating a User Account, continued

**Procedure** (continued)

| Step | Action |
|---|---|
| 14 | In the **City** field (if applicable), enter the **city** of the user's workplace.<br><br>**Note**: The City field is optional and not required to create a new user account. |
| 15 | In the **State** field (if applicable), enter the **state** of the user's workplace.<br><br>**Note**: The State field is optional and not required to create a new user account. |
| 16 | In the **Zip** code field (if applicable), enter the **zip code** of the user's workplace.<br><br>**Note**: The Zip code field is optional and not required to create a new user account. |
| 17 | From the **Customer System Admin** radio buttons, select "**Yes**" or "**No**" to assign the user Administration permissions.<br><br>**Note**: Be cautious when assigning user system administration permissions. Users with Admin permissions can edit any aspect of your account within the Control Center system. |
| 18 | Click Create User .<br><br>**Result**: The system uses the information you provided to create the new user account. If the user account was created successfully the system will display the **User Profile** screen with a success message; otherwise the system will display an error message indicating why the user account was not created.<br> |

# User Profile

**Introduction**

The **User Profile** screen provides detailed information about a selected user account. From this screen, you can change a password, update contact & address information, deactivate and/or change a user's administrative rights.

**Note**: The user contact information is pre-populated for **Ordering** and **Billing Dispute** resolution based on the information that is provided in the **User Profile** screen.

# User Profile/Field & Descriptions

**Overview**

The table below describes the fields and buttons displayed on the **User Profile** screen.

| Field Name | Description |
|---|---|
| **Enterprise ID** | This field identifies the unique Control Center Enterprise ID that is associated to the selected user profile. |
| **Enterprise Name** | This field identifies the customer account name that is associated to the selected user profile. |
| **User Name** | This field displays the unique username for the selected user profile. |
| **Your Current Password** | This *required* field provides a validation that Customer System Administrator updating the **User Profile** screen has knowledge of the current password.<br><br>**Note**: The **"Your Current Password"** field is required when updating any details on the **User Profile** screen. The current password is the Customer System Administrator's password, not the user's password. |
| **New Password** | This *optional* field allows you to change the user's password. |
| **Confirm Password** | This *conditional* field provides a system validation that verifies the **"Confirm Password"** matches the **"New Password"** field.<br><br>**Note**: When changing a user's password, the **Confirm Password** is required when a **New Password** is entered. |
| **First Name** | This *required* field displays the user's first name. You can change this at any time by typing a new value in the available text field. |
| **Last Name** | This *required* field displays the user's last name. You can change this at any time by typing a new value in the available text field. |
| **E-mail** | This *required* field displays the user's e-mail address. You can change this at any time by typing a new value in the available text field. |

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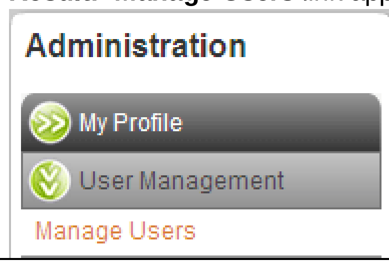
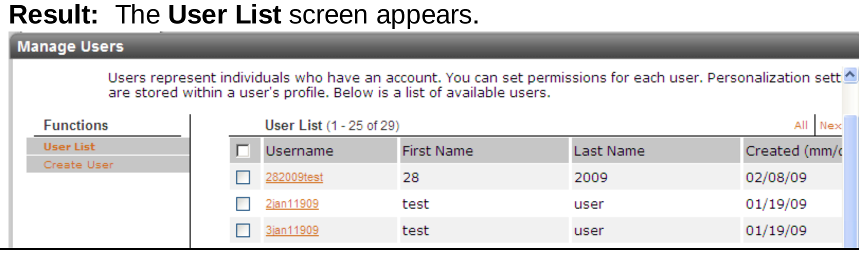
# User Profile/Field & Descriptions, continued

| Field Name | Description |
|---|---|
| **Phone** | This *required* field displays the user's telephone number. You can change this at any time by typing a new value in the available text field. |
| **Secondary Phone** | This *optional* field shall contain the secondary telephone number at which the new user can be reached. |
| **Cell Phone** | This *optional* field shall contain a cellular phone number at which the new user can be reached. |
| **Fax** | This *optional* field may display the telephone number where FAX transmissions can be received. You can change this at any time by typing a new value in the available text field. |
| **Pager** | This *optional* field may contain the telephone number where the user may receive a page. You can change this at any time by typing a new value in the available text field. |
| **Time Zone** | This *required* field displays the time zone in which the user currently resides. You can change this by selecting a new value from the available drop down menu. |
| **Street** | This *optional* field may contain the street address of the user's workplace. You can change or delete this value at any time. |
| **City** | This *optional* field may contain the user's workplace city. You can change or delete this value at any time. |
| **State** | This *optional* field may contain the user's workplace state. You can change or delete this value at any time. |
| **Zip** | This *optional* field may contain the user's workplace ZIP or postal code. You can change or delete this value at any time. |
| **Customer System Admin** | These radio buttons identify whether or not the user has administrative rights within the Control Center application. |
| **Status** | This field displays the current status of the user's account. You can change this value at any time. |
| Submit | This button allows you to save changes to the selected user profile. |
| Reset | This button allows you to undo any changes you may have made on the selected user profile. |
| Log in as This User | This button allows you to log into the Control Center system as the selected user. This allows you to view exactly what the selected user sees when logged into the system. |

# Viewing the User Profile

**Procedure**

Follow the steps in the procedure below to **view** the **User Profile** details.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Home page, click on the User Management link on the left hand Administration section.<br><br>Result: Manage Users link appears<br>
</td></tr>
<tr><td>2</td><td>Next click on the Manage Users link<br><br>Result: The User List screen appears.<br>
</td></tr>
</table>

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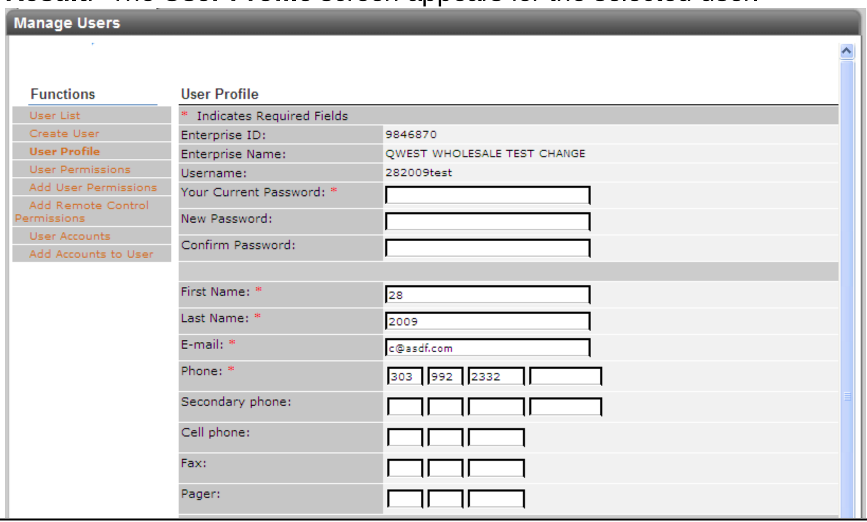
# Viewing the User Profile, continued

**Procedure** (continued)

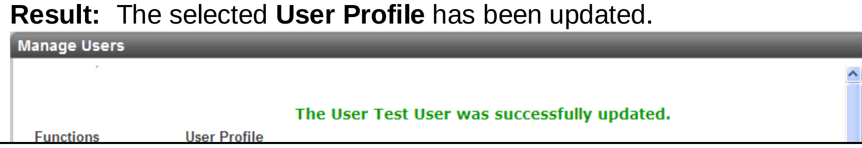
| Step | Action |
|---|---|
| 19 | From the **User List** screen, click on the **User Name**.<br><br>**Result**: The **User Profile** screen appears for the selected user.<br> |

# Changing a User Password

**Procedure**

Follow the steps in the procedure below to **change** the selected **user's password**.

**Note**: As a result of changing the user password in the Control Center Administration module, the new password will propagate to the Remote Control database. This will maintain the one seamless login for both applications.

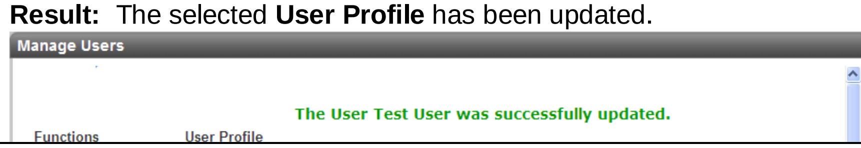
| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | In the **New Password** field, enter a new password for the selected user. |
| 3 | In the **Confirm Password** field, enter the new password for the selected user.<br><br>**Note**: The **Confirm Password** *must match* the value entered in the **New Password** field. |
| 4 | Click  <br><br>**Result:** The selected **User Profile** has been updated.<br>  |

# Changing User Contact Information

**Procedure**

Follow the steps in the procedure below to **update** the selected user's **contact** information.

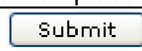
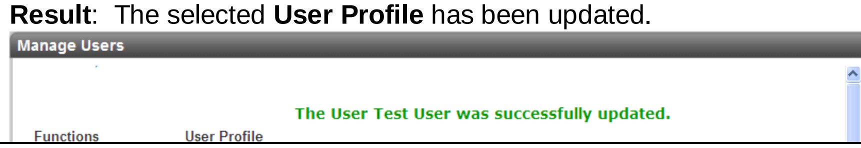
**Note**: As a result of changing the user contact information in the Control Center Administration module, this contact information will propagate to the Remote Control database. This information is used to pre-populate **Ordering** and **Billing Dispute** contact information based on the details listed in the **User Profile**.

| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | In the **First Name** field (if applicable), enter a new value for the selected user's first name. |
| 3 | In the **Last Name** field (if applicable), enter a new value for the selected user's last name. |
| 4 | In the **E-mail** address field (if applicable), enter a valid value for the selected user's contact email address including the @ symbol and .com, .net, etc. extension. |
| 5 | In the **Phone** field (if applicable), enter a valid value for the selected user's contact telephone number. |
| 6 | In the **Secondary Phone** field (if applicable), enter a valid value for the selected user's **secondary telephone** number. |
| 7 | In the **Cell Phone** field (if applicable), enter a valid value for the selected user's **cellular phone** number. |
| 8 | In the **Fax** field (if applicable), enter a valid value for the selected user's contact fax number. |
| 9 | In the **Pager** field (if applicable), enter a valid value for the selected user's contact pager number. |
| 10 | Click  <br><br>**Result:** The selected **User Profile** has been updated.<br> |

# Changing User Address Information

**Procedure**

Follow the steps in the procedure below to **update** the selected user's **address** information.

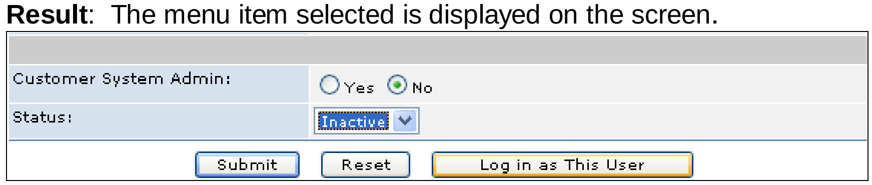
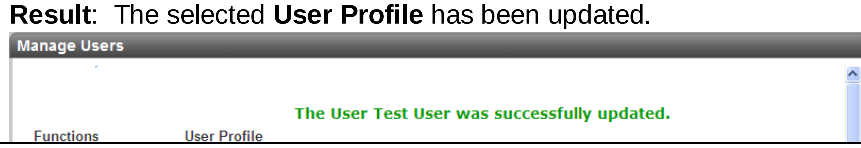
| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | From the **Time Zone** drop down menu (if applicable), select the time zone in which the selected user currently resides. |
| 3 | In the **Street** field (if applicable), enter the street address of the selected user's workplace. |
| 4 | In the **City** field (if applicable), enter the city of the selected user's workplace. |
| 5 | In the **State** field (if applicable), enter the state of the selected user's workplace. |
| 6 | In the **Zip** code field (if applicable), enter the zip code of the selected user's workplace. |
| 7 | Click  <br><br>**Result**: The selected **User Profile** has been updated.<br>  |

# Deactivating a User Account

**Procedure**

Follow the steps in the procedure below to **deactivate** the selected **user**.

**Note**: As a result of deactivating a user in the Control Center Administration module, this user will also be deactivated in the Remote Control portal.

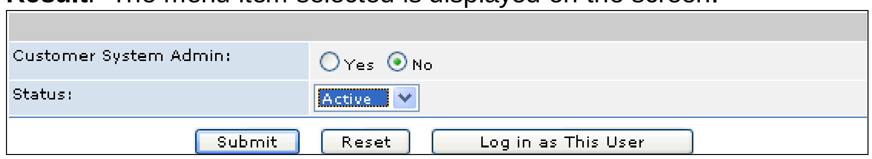
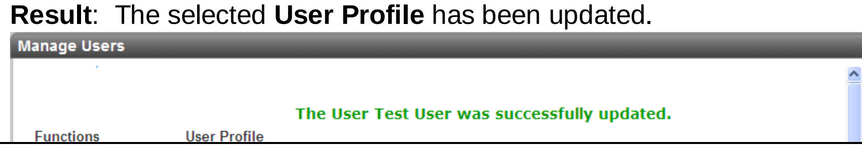
| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | From the **Status** drop down menu, select **Inactive**.<br><br>**Result**: The menu item selected is displayed on the screen.<br><br> |
| 3 | Click <br><br>**Result**: The selected **User Profile** has been updated.<br><br> |

# Activating a User Account

**Procedure**

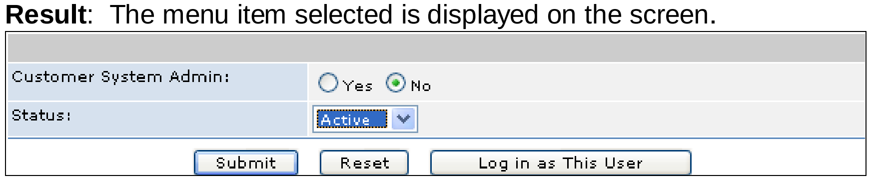
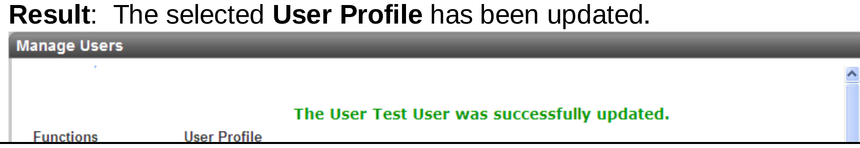
Follow the steps in the procedure below to **activate** the selected **user**.

**Note**: As a result of activating a user in the Control Center Administration module, this user will also be activated in the Remote Control portal.

| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | From the **Status** drop down menu, select **Active**.<br><br>**Result**: The menu item selected is displayed on the screen.<br> |
| 3 | Click <br><br>**Result**: The selected **User Profile** has been updated.<br> |

# Changing User Admin Access

**Procedure** Follow the steps in the procedure below to **change** the selected user's **administrative rights**.

| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, enter **Your Current Password**.<br><br>**Note**: The current password is the Customer System Administrator's password, not the user's password. Also, the "your current password" is case-sensitive and should be entered exactly as it was created. |
| 2 | From the **Customer System Admin** radio buttons, select "**Yes**" or "**No**".<br><br>**Yes** = The selected user will become a System Admin for your Control Center Enterprise ID. Be cautious when assigning user system administration permissions. Users with Admin permissions can edit any aspect of your account(s).<br>**No** = The selected user will not have Administrator rights.<br><br>**Result**: The menu item selected is displayed on the screen.<br> |
| 3 | Click <br><br>**Result**: The selected **User Profile** has been updated.<br> |

# Assign Control Center Permissions

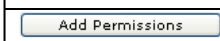
**Introduction**

The **Assign Permissions to User** screen allows you to add user permissions to a new or existing user account. This screen displays a listing of system permissions and enables you to assign specific functionality to your users.

# Assign User Permissions/Field & Descriptions

**Overview**

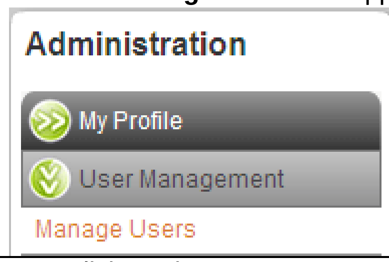
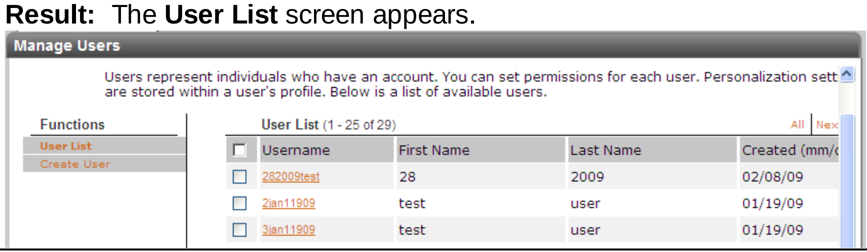
The table below describes the fields and buttons displayed on the **Add Permissions** screen.

| Field Name | Description |
|---|---|
| **Permission** | This column displays the name of each permission available in the Control Center system. A check box appears next to each permission that has not already been assigned to the user. |
| **Description** | This column briefly describes each permission available in the Control Center system. |
|  | This button allows you to add the selected permission(s) to the user's account. |

# Viewing Assign Permissions

**Procedure**

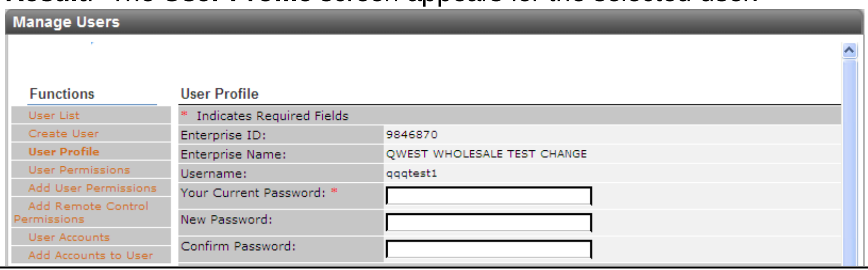
Follow the steps in the procedure below to **view** the add **permissions** screen.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Home page, click on the User Management link on the left hand Administration section.<br><br>Result: Manage Users link appears<br>
</td></tr>
<tr><td>2</td><td>Next click on the Manage Users link<br><br>Result: The User List screen appears.<br>
</td></tr>
</table>

*Continued on next page*

# Viewing Assign Permissions, continued

**Procedure** (continued)

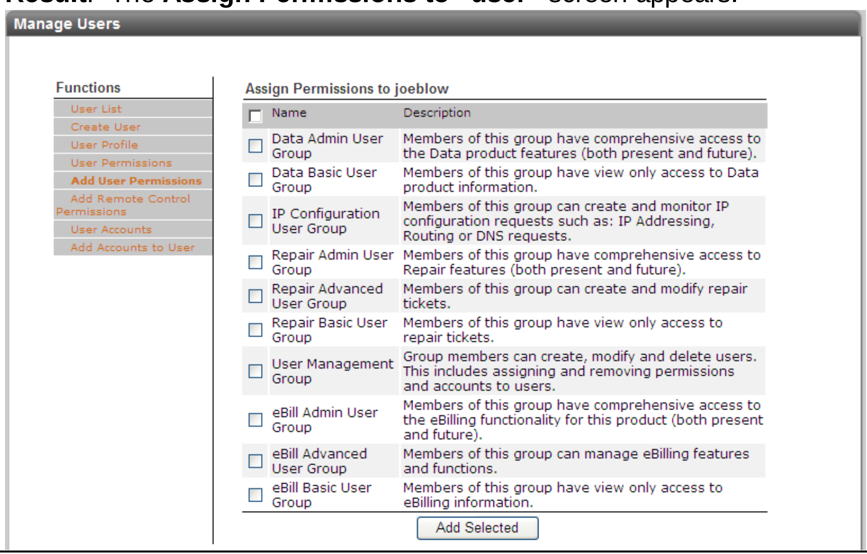
| Step | Action |
|---|---|
| 3 | From the **User List** screen, click on the **User Name** that you would like to assign permissions to.<br><br>**Result**: The **User Profile** screen appears for the selected user.<br> |

*Continued on next page*

# Viewing Assign Permissions, continued

**Procedure** (continued)

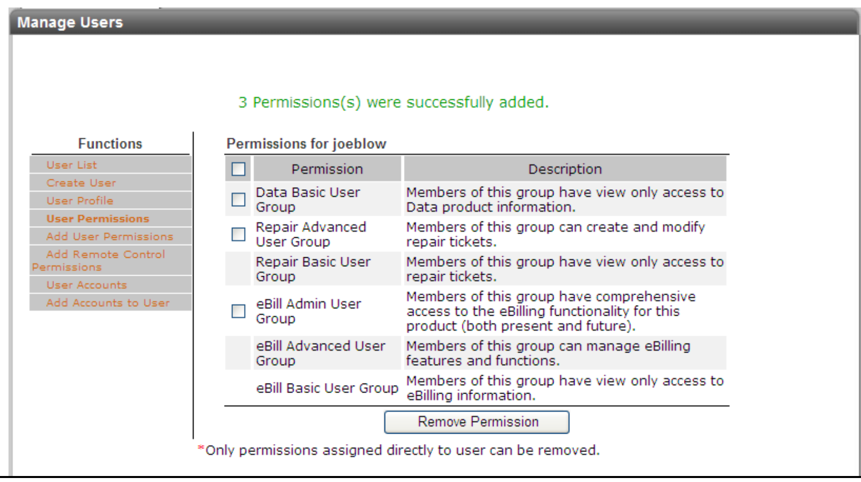
| Step | Action |
|---|---|
| 4 | From the **User Profile** screen, click on the **Add User Permissions** function.<br><br>**Result**: The **Assign Permissions to "user"** screen appears. |



# Adding Permissions to User

**Procedure**

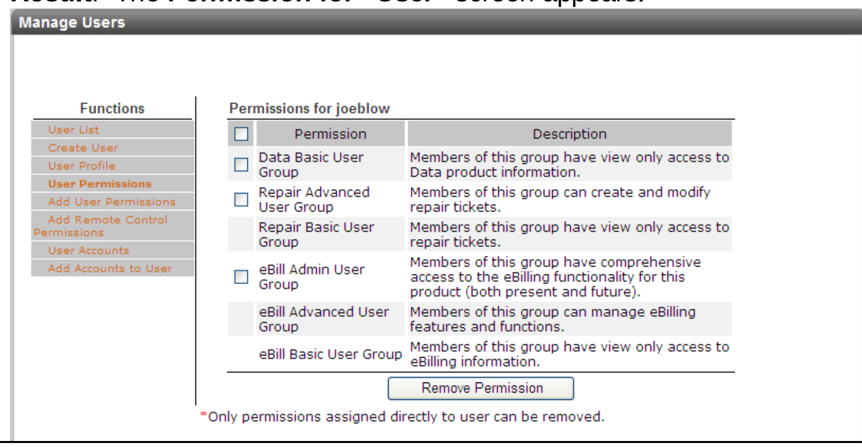
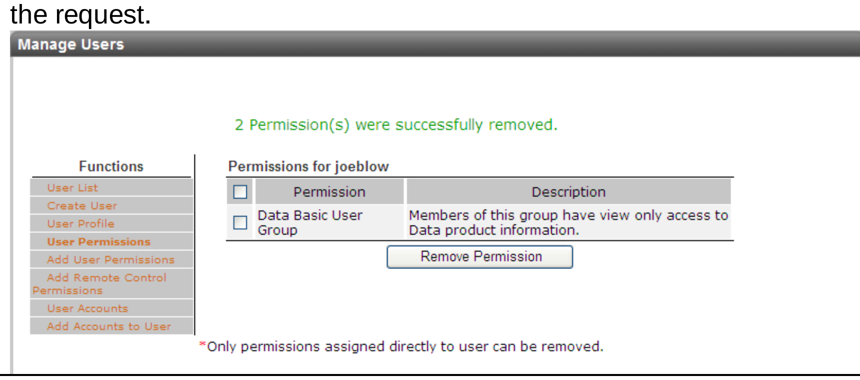
Follow the steps in the procedure below to **add** Control Center **permissions** to a user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Assign Permissions to “user” screen, select each check box next to all the permissions you would like to grant to the user account.<br><br>Note: You will only see check boxes for permissions that have not already been granted for the user. If the user already has the permission no check box will appear.</td></tr>
<tr><td>2</td><td>Click Add Permissions .<br><br>Result: The system assigns the selected permission(s) to the user account. The User Permissions screen refreshes displaying a message indicating the success or failure of the requested assignment.<br><br>
</td></tr>
</table>

# Removing Permissions from User

**Procedure**

Follow the steps in the procedure below to **remove permissions** from a user account.

| Step | Action |
|---|---|
| 1 | From the **User Profile** screen, click on the **User Permissions** function.<br><br>**Result**: The **Permission for "User"** screen appears.<br> |
| 2 | From the **Permissions for "User"** screen, select each check box next to all the permissions you would like to remove from the user's account.<br><br>**Note**: You will only see the current permissions for the user account. |
| 3 | Click  .<br><br>**Result**: The **Permissions for "User"** screen refreshes displaying only the retained permission(s). Also, a message will be provided that indicates the success (with number of permission removed) or failure of the request.<br> |

# Assign Remote Control Permissions

**Introduction**

The **Add Remote Control Permissions** screen allows you to add a user role to a new or existing user account for functionality that is provided via the Remote Control link. This screen displays a listing of system roles and enables you to assign specific functionality to your users.

# Assign User Permissions/Field & Descriptions

**Overview**

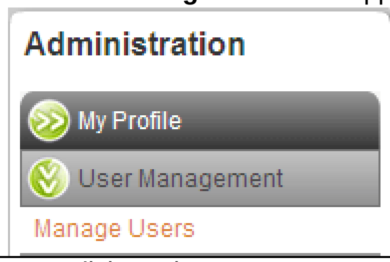
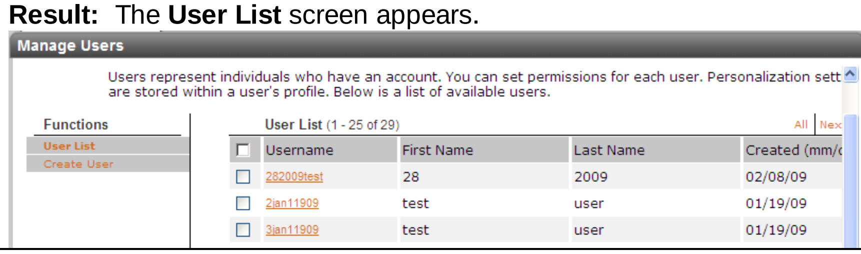
The table below describes the fields and buttons displayed on the **Add Remote Control Permissions** screen.

| Field Name | Description |
|---|---|
| **Customer** | This column displays the Remote Control Customer ID. |
| **User Name** | This column displays the name of the selected user. |
| **Roles** | This drop down menu displays the assigned role for the selected user, as well as, the options available to add/change the role for the user.<br><br>**Note:** The role defined on the **Add Remote Control Permissions** screen will define the modules that the user will have access to in the Remote Control system. If this field is null, the user will not have access to any of the modules in Remote Control. |
| Save User Information | This button allows you to add/change the selected role for the user's account. |
| Clear All | This button allows you to clear the selected roles in your current session. |
| **Change all roles** | This checkbox allows you to change the roles for all your users in one transaction. |

# Viewing Assign Permissions

**Procedure**

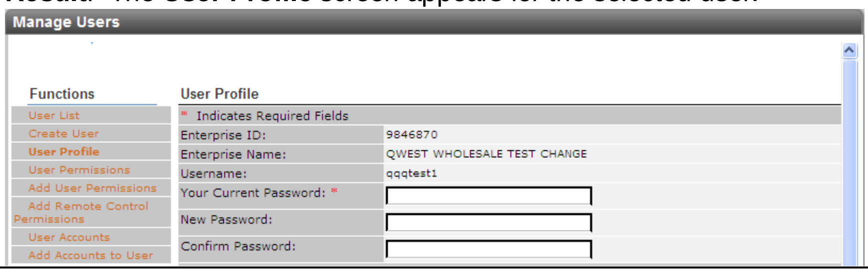
Follow the steps in the procedure below to **view** the add Remote Control **permissions** screen.

| Step | Action |
|---|---|
| 1 | From the **Home** page, click on the **User Management** link on the left hand **Administration** section.<br><br>**Result: Manage Users** link appears<br><br> |
| 2 | Next click on the **Manage Users** link<br><br>**Result:** The **User List** screen appears.<br><br> |

*Continued on next page*

# Viewing Assign Permissions, continued

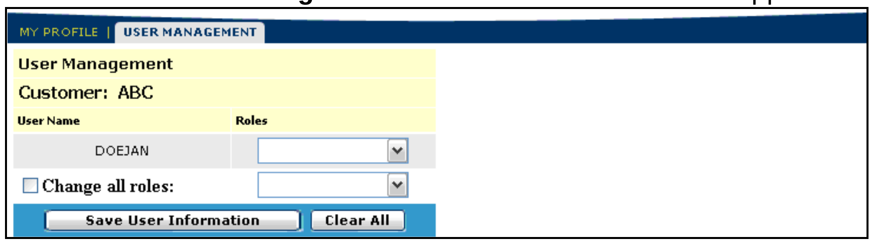
**Procedure** (continued)

| Step | Action |
|---|---|
| 3 | From the **User List** screen, click on the **User Name** that you would like to assign permissions to.<br><br>**Result**: The **User Profile** screen appears for the selected user.<br><br> |

*Continued on next page*

# Viewing Assign Permissions, continued

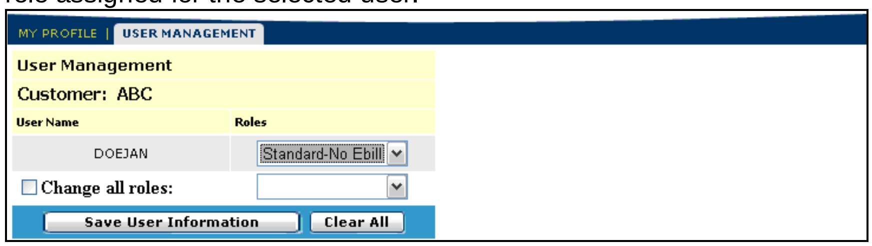
**Procedure** (continued)

| Step | Action |
|---|---|
| 4 | From the **User Profile** screen, click on the **Add Remote Control Permissions** function.<br><br>**Result**: The **User Management for Remote Control** screen appears.<br> |

# Adding Permissions to User

**Procedure**

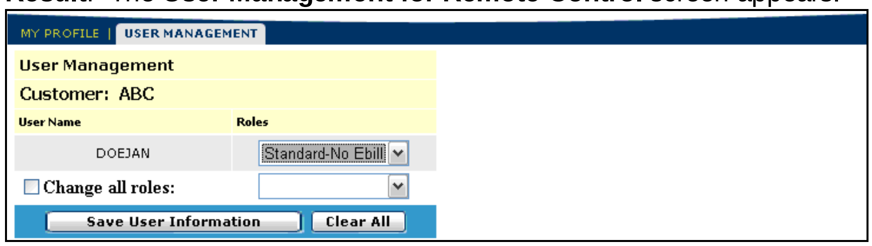
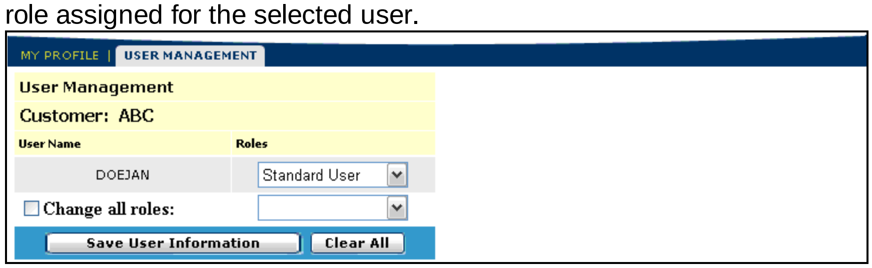
Follow the steps in the procedure below to **add** Remote Control **permissions**.

| Step | Action |
|---|---|
| 1 | From the **User Management for Remote Control** screen, select the role you would like to grant to the user account. |
| 2 | Click Save User Information.<br><br>**Result**: The system assigns the selected role to the user account. The **User Management for Remote Control** screen refreshes displaying the role assigned for the selected user.<br>  |

# Changing Permissions

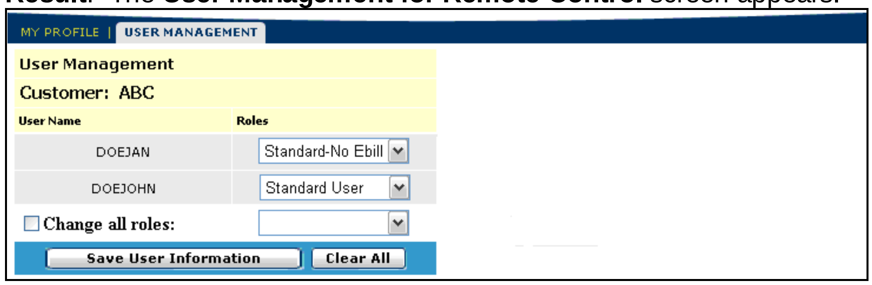
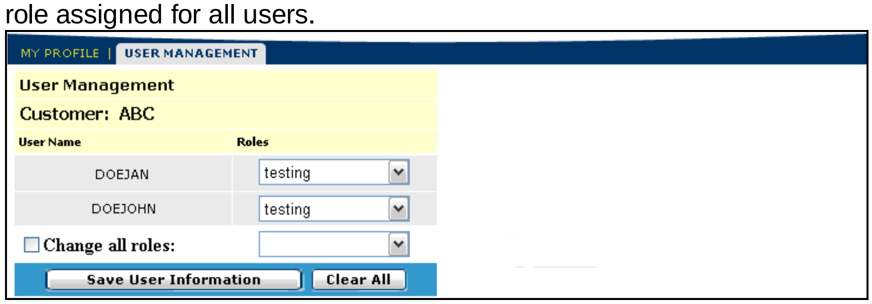
**Procedure**

Follow the steps in the procedure below to **change permissions** for a user account.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the User Profile screen, click on the Add Remote Control Permissions function.<br><br>Result: The User Management for Remote Control screen appears.<br>
</td></tr>
<tr><td>2</td><td>From the User Management for Remote Control screen, select the role you would like to grant to the user account.</td></tr>
<tr><td>3</td><td>Click Save User Information.<br><br>Result: The system assigns the selected role to the user account. The User Management for Remote Control screen refreshes displaying the role assigned for the selected user.<br>
</td></tr>
</table>

# Changing All Roles

**Procedure** Follow the steps in the procedure below to **change** the **role** for all user accounts.

| Step | Action |
|---|---|
| 4 | From the **User Profile** screen, click on the **Add Remote Control Permissions** function.<br><br>**Result**: The **User Management for Remote Control** screen appears.<br> |
| 5 | From the **User Management for Remote Control** screen, select the **Change all roles** checkbox. |
| 6 | From the **Change all roles** drop down menu, select the desired role for all users.<br><br>**Note**: The role selected will be assigned to all users within your Control Center Enterprise ID and will determine the modules your users will access in the Remote Control system. |
| 7 | Click .<br><br>**Result**: The system assigns the selected role to all user accounts. The **User Management for Remote Control** screen refreshes displaying the role assigned for all users.<br> |

# Customer Account Details

**Introduction**

The **Customer Account Details** screen provides you additional information about the selected customer account.

# Customer Account Details/Fields& Descriptions

**Overview**

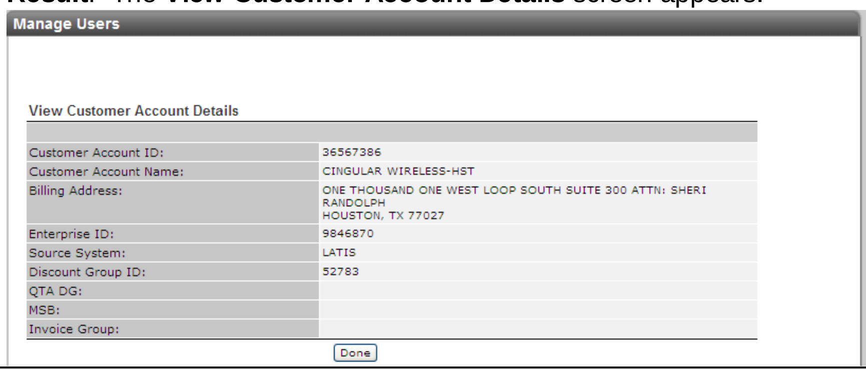
The table below describes the fields and buttons displayed on the **Customer Account Details** screen.

| Field Name | Description |
|---|---|
| **Customer Account ID** | This field displays the unique identifier for the selected customer account number. |
| **Customer Account Name** | This field displays the customer account name for the selected account. |
| **Billing Address** | This field displays the address to which the customer's bills are sent. |
| **Enterprise ID** | This field displays the unique identifier for the Control Center Enterprise that is associated to the selected account. |
| **Source System** | This field displays the billing system used for the selected account. |
| **Discount Group ID** | This field displays the unique identifier for the Discount Group associated to the selected account (if applicable). |
| **Invoice Group** | This fields displays the unique identifier for the Invoice Group associated to the selected account (if applicable). |
|   | This button allows you to return to the last screen you were viewing. |

# Viewing Customer Account Details

**Procedure**

Follow the steps in the procedure below to **view** the customer **account** details.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the User Accounts or Add Accounts screen(s), click on the Element ID (Customer Account Number) link.<br><br>Result: The View Customer Account Details screen appears.<br>


</td></tr>
<tr><td>2</td><td>Click 

once you have completed reviewing the details on the screen.<br><br>Note: The system will return you to your previously viewed screen.</td></tr>
</table>

# Add Account(s)

**Introduction**

The **Add Accounts to User** screen allows you to assign individual billing accounts to a selected user account. A user will only see the billing information for the accounts assigned to them.

**Note**: As a result of adding a new account number in the Control Center Administration module, this account number will be available in the Remote Control portal.

# Add Account(s)/Field & Descriptions

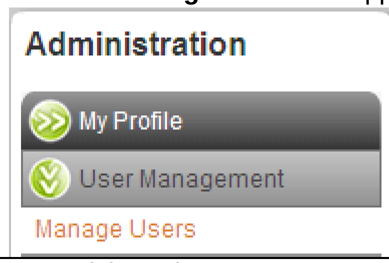
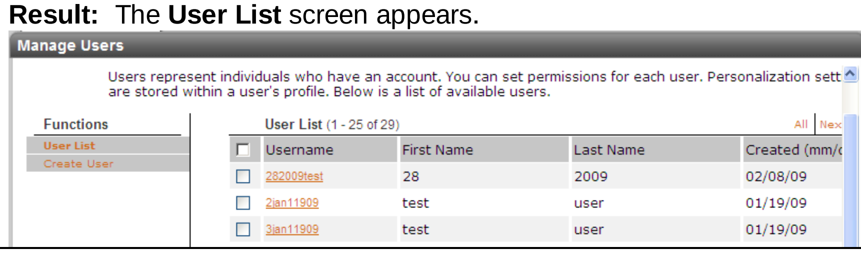
**Overview**

The table below describes the fields and buttons displayed on the **Add Accounts** to User screen.

| Field Name | Description |
|---|---|
| **Check Box** | The checkboxes in this column allow you to select the customer account(s) you want to associate with the selected user account. All boxes with a check mark in them will be added to the user. |
| **Element ID** | This column displays the unique customer account number for each service element in the list. |
| **Element Type** | This column displays the customer type for each customer account number listed. Values may include the following:<br>• **LD (Long Distance Account Number)**<br>• **DG (Discount Group)** |
| **Element Name** | This column displays the customer name for each service element in the list. |

# Viewing Add Account(s)

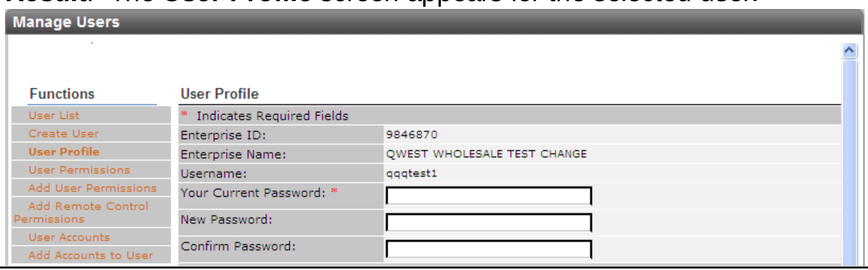
**Procedure** Follow the steps in the procedure below to **view** the **Add Accounts** to user screen.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Home page, click on the User Management link on the left hand Administration section.<br><br>Result: Manage Users link appears<br>
</td></tr>
<tr><td>2</td><td>Next click on the Manage Users link<br><br>Result: The User List screen appears.<br>
</td></tr>
</table>

*Continued on next page*

# Viewing Add Account(s), continued

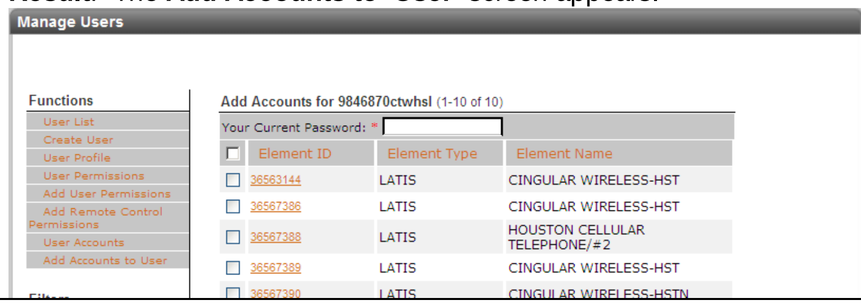
**Procedure** (continued)

| Step | Action |
|---|---|
| 3 | From the **User List** screen, click on the **User Name** that you would like to assign permissions to.<br><br>**Result**: The **User Profile** screen appears for the selected user.<br> |

*Continued on next page*

# Viewing Add Account(s), continued

**Procedure** (continued)

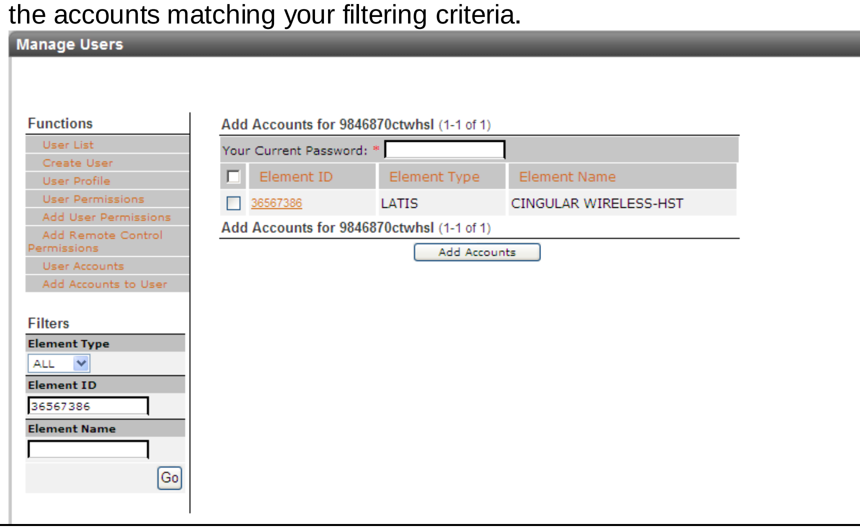
| Step | Action |
|---|---|
| 3 | From the **User Profile** screen, click on the **Add Accounts** function.<br><br>**Result**: The **Add Accounts to 'User'** screen appears.<br> |

# Filtering Add Account(s)

**Procedure**

Follow the steps in the procedure below to **filter** the **Add Accounts** screen.

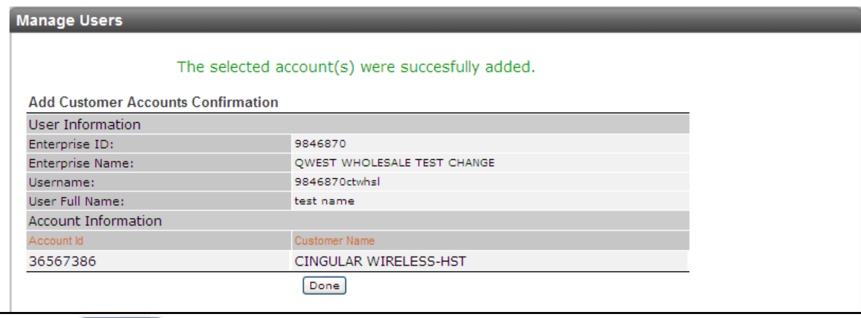
**Note**: The filtering fields are provided in the left-hand navigation area of the screen; enter your filtering criteria as needed.

| Step | Action |
|---|---|
| 1 | From the **Add Accounts to 'User'** screen, select the customer type for your business (**LD** or **DG**) from the **Element Type** drop down menu (if applicable) |
| 2 | In the **Element ID** field (if applicable), enter your **Customer Account Number** for the accounts you wish to filter. |
| 3 | In the **Enterprise Name** field (if applicable), enter your **Control Center Enterprise Name** for the accounts you wish to filter. |
| 4 | Click .<br><br>**Result**: The **Add Accounts to User** screen refreshes and displays only the accounts matching your filtering criteria.<br> |

# Adding Account(s) to User(s)

**Procedure**

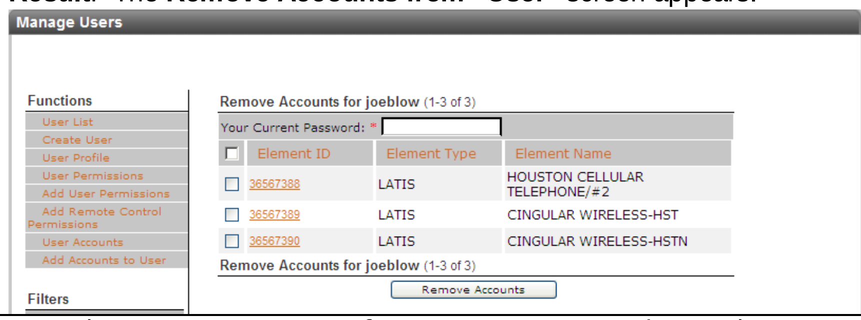
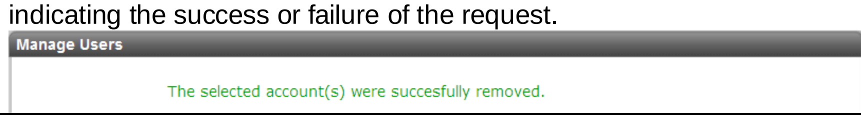
Follow the steps in the procedure below to **assign accounts** to a selected user account.

| Step | Action |
|---|---|
| 1 | From the **Add Account to 'User'** screen, select the checkbox next to each account that you want assigned to the user account. |
| 2 | Click  .<br><br>**Result**: The system assigns the selected billing account(s) to the user account. A confirmation page appears, indicating the success or failure of the addition.<br>  |
| 3 | Click  . |

# Removing Account(s) from User(s)

**Procedure**

Follow the steps in the procedure below to **remove accounts** from a selected user account.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the User Profile screen, click on the User Accounts function.<br><br>Result: The Remove Accounts from “User” screen appears.<br>

</td></tr>
<tr><td>2</td><td>From the Remove Accounts from “User” screen, select each checkbox next to all the accounts you would like to remove from the user’s account.<br><br>Note: You will only see the current accounts associated to that user account.</td></tr>
<tr><td>3</td><td>Click 
.<br><br>Result: The Remove Customer Accounts Confirmation page appears, indicating the success or failure of the request.<br>

</td></tr>
</table>

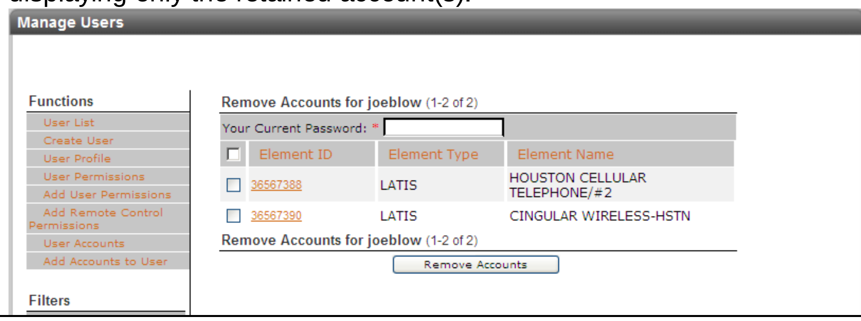
*Continued on next page*

# Removing Account(s) from User(s), continued

**Procedure** (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
Click Done.

**Result**: The **Remove Accounts from “User”** screen refreshes displaying only the retained account(s).



</td></tr>
</table>

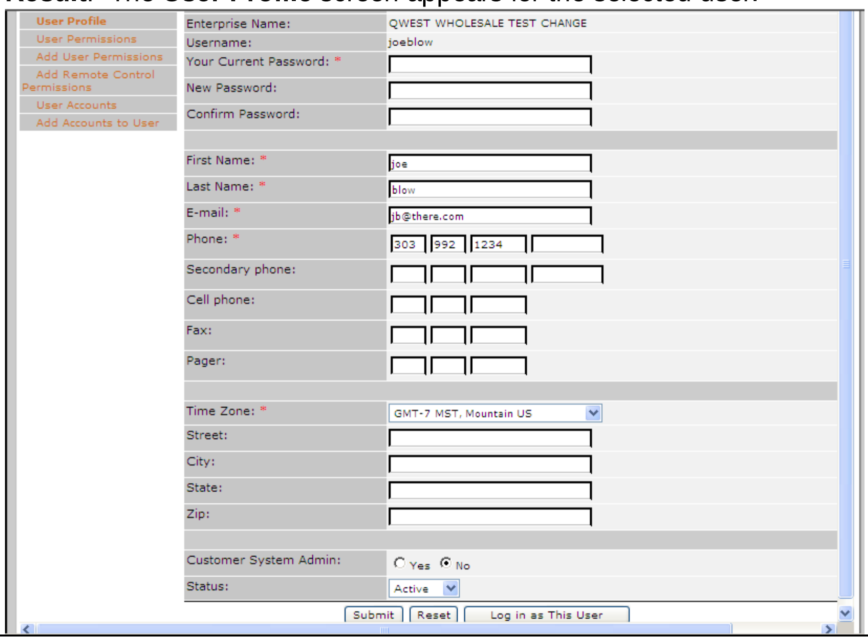
# Log in as This User

**Introduction**

The **Log in as This User** functionality allows you to log into the system using a selected user's credentials. This allows you to experience the system as the user views it.

**Procedure**

Follow the steps in the procedure below to **log in** as another user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the User List screen, click on the desired User Name.<br><br>Result: The User Profile screen appears for the selected user.<br>


</td></tr>
</table>

*Continued on next page*

# Log in as This User, continued

**Procedure** (continued)

| Step | Action |
|---|---|
| 2 | Click Log in as This User.<br><br>**Result**: The system logs you in as the selected user. This will allow you to navigate the modules of Control Center and Remote Control as if you were the selected user. |

# Enterprise Details Screen

**Introduction**

The **Enterprise Details** screen allows CSA's the ability to view Enable/Disable Self Registration and/or to change Password standards.

From this screen, you will also be able to make changes to self registration and change password standards for your enterprise.

# User List/Field & Descriptions

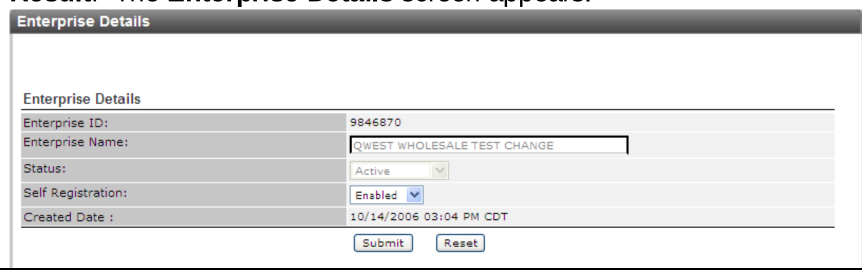
**Overview**

The table below describes the fields and buttons displayed on the **Enterprise Details** screen.

| Field Name | Description |
|---|---|
| **Enterprise ID:** | This field displays the enterprise ID |
| **RMC ID:** | This field displays the RMC ID |
| **Status:** | This field displays if the Qcontrol account is Active or De-Activated |
| **Self Registration:** | This field allows CSA to Enabled or Disabled self registration. If Enabled is selected users will have the ability to self-register for your enterprise. If it is disable users will **not** be allowed to self-register for your enterprise. |
| **Created Date:** | This field displays the date the Qcontrol date was created |
| **Password Standards:** | This field allows CSA to change password options for your enterprise so that stricter standards can be applied for your organization. |
| Submit | This button allows you to submit and save the changes made |

# Viewing the Enterprise Details

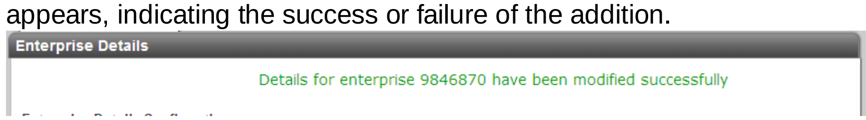
**Procedure** Follow the steps in the procedure below to **view** the **Enterprise Details**.

| Step | Action |
|---|---|
| 1 | From the **Landing** page in the administration section, click on the **Enterprise Details** application.<br><br>**Result**: The **Enterprise Details** screen appears.<br><br> |
| | |

# Changing Enterprise Details

**Procedure**

Follow the steps in the procedure below to **change** the self registration and/or password standards for your Qcontrol account.

| Step | Action |
|---|---|
| 1 | From the **Enterprise Details** screen click on Self Registration: drop down and click on Enabled or Disabled<br>**Note:** If you click Disabled the password standards will **not** be available to change. |
| 2 | From the **Enterprise Details** screen click on the boxes next to the passwords to customize passwords for your enterprise |
| 3 | Click  <br>**Result**: A pop up box will appear and question will appear "Are you sure you want to enable self registration?" Click OK and a confirmation page appears, indicating the success or failure of the addition.<br> <br>**Note:** Password standards that were enabled will be shown with a check box next to the ones that are enabled. |
| 4 |  <br>Click<br>**Result:** The screen will refresh and you will be able to make further changes.<br>  |