Covisint Connection and Administration (CCA) ~ Security Administrator Guide

April 2008

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Using This Help Section

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Delegated Model

CCA is a delegated administration tool designed to give power to people who are best in a position to manage user access and make security decisions. In some companies, this may be accomplished through a central office; while in other companies, this may be accomplished by delegating responsibility to people spread throughout the company. The delegated model allows each company to set up the structure that best fits their needs for managing access grants to their users.

The delegated model allows a single company to set up one or more organizations in CCA. CCA organizations are simply groupings of users with their own administrator(s) and their own available service packages. Organizations that are created below the parent organization are called divisions. Administrators in the parent organization can perform tasks on users in the divisions below.

Defining Administrator Roles

A definition of all Administrator Roles is listed here for informational purposes.



The following section displays roles / privileges in two ways. First, <u>Table 1</u> is comprised of privileges associated per role in a matrix view. Second, <u>Figure 1</u> is comprised of privileges associated per role in a list view.

Table 1:			USER ROLES		
Matrix of Privileges Associated Per Role	1. GENERAL USER	2. PASSWORD Admin	3. User Account Admin	4. SERVICE ADMIN	5. SECURITY ADMIN
APPROVE / REJECT DIVISION'S SERVICE PACKAGE REQUEST	-	-	-	Х	Х
APPROVE / REJECT NEW USER REGISTRATION REQUESTS	-	-	Х	-	Х
APPROVE / REJECT ORGANIZATION SERVICE REQUEST	-	-	-	-	Х
APPROVE / REJECT SITE CODES FOR DIVISIONS OF YOUR ORG	-	-	-	-	Х
APPROVE / REJECT USER'S SERVICE PACKAGE REQUESTS	-	-	-	Х	Х
AUDIT USER GRANTS	-	-	Х	Х	Х
AUDIT USERS IN COMPANY (QUARTERLY & ANNUALLY)	-	-	Х	-	Х
CHANGE EMAIL PREFERENCES FOR SELF	Х	Х	Х	Х	Х
CHANGE PASSWORD OF SELF	Х	Х	Х	Х	Х
DELETE A DIVISION IN YOUR ORG	-	-	-	-	Х
DELETE A USER ACCOUNT	-	-	Х	-	Х
EDIT ORGANIZATION AND/OR DIVISION PROFILE	-	-	-	-	Х
EDIT PROFILE OF OTHERS	-	-	Х	-	Х
EDIT PROFILE OF SELF	Х	Х	Х	Х	Х
GENERATE A SERVICE SUMMARY REPORT	-	-	-	-	Х
GENERATE REPORT OF USER SUMMARY BY ORGANIZATION	-	-	-	Х	Х
GENERATE REPORT OF USERS GRANTS PER SVC. PACKAGE	-	-	-	Х	Х
GENERATE SECURITY ADMINISTRATOR REPORTS	-	-	-	Х	Х
GRANT A SERVICE PACKAGE TO A DIVISION IN YOUR ORG	-	-	-	-	Х
GRANT A SERVICE PACKAGE TO A USER	-	-	-	Х	Х
INVITE USERS TO REGISTER	-	-	Х	-	Х
MODIFY USER ROLES	-	-	-	-	Х
MOVE A USER	-	-	Х	-	Х
REMOVE A SERVICE PACKAGE FROM A DIVISION IN YOUR ORG	-	-	-	-	Х

Table 1:	User Roles				
Matrix of Privileges Associated Per Role	1. GENERAL USER	2. Password Admin	3. USER ACCOUNT ADMIN	4. SERVICE ADMIN	5. SECURITY ADMIN
REMOVE SERVICE PACKAGE FROM A USER	-	-	-	Х	Х
REQUEST A SERVICE PACKAGE FOR MY ORGANIZATION	-	-	-	Х	Х
REQUEST A SERVICE PACKAGE FOR SELF	Х	Х	Х	Х	Х
RESET PASSWORD OF OTHERS	-	Х	Х	-	Х
SEARCH /VIEW DETAILS FOR DIVISIONS IN MY ORGANIZATION	-	Х	-	Х	Х
SEARCH FOR USERS IN MY ORGANIZATION	-	Х	Х	Х	Х
SPECIFY PASSWORD FOR SELF	-	Х	-	-	Х
SPECIFY PASSWORD OF OTHERS	-	Х	-	-	Х
SUSPEND A DIVISION IN YOUR ORG	-	-	-	-	Х
SUSPEND A USER ACCOUNT	-	-	Х	-	Х
VIEW MY ORGANIZATIONAL ADMINISTRATORS	Х	Х	Х	Х	Х
VIEW ORGANIZATION'S HIERARCHY	-	-	-	-	Х
VIEW / CANCEL PENDING REQUESTS OF SELF	Х	Х	Х	Х	Х
VIEW REQUEST HISTORY OF OTHERS	-	-	-	Х	Х
VIEW REQUEST HISTORY OF SELF	Х	Х	Х	Х	Х

Figure 1: List of Privileges Associated Per Role

Role 1: Privileges associated to All Registered Users (General Users)

- Change email preferences for self
- Change password of self
- Edit profile of self

- Request a service package for self
- View my organizational administrators

- View / cancel pending requests of self
- View request history of self

Role 2: Privileges associated to Password Administrator

- All of General Users +
- Reset password of others
- Search /View details for divisions in my organization

- Search for users in my organization
- Specify password for self
- Specify password of others

Role 3: Privileges associated to User Account Administrator

- All of General Users +
- Approve / Reject new user registration requests
- Audit user grants

- Audit users in company (Quarterly & Annually)
- Delete a user account
- Edit profile of others
- Invite users to register

Role 4: Privileges associated to Service Administrator

- All of General Users +
- Approve / Reject division's service package request
- Approve / Reject user's service package requests
- Audit users in company (Quarterly & Annually)
- Generate report of user summary by organization
- Generate report of users' grants per svc. package

- Generate security administrator reports
- Grant a service package to a user
- Remove service package from a user
- Request a service package for my organization
- Search /View details for divisions in my organization

- Move a user
- Reset password of others
- Search for users in my organization
- Suspend a user account
- Search for users in my organization
- View request history of others

Role 5: Privileges associated to Security Administrator

- All of General Users +
- Approve / Reject division's service package request
- Approve / Reject new user registration requests
- Approve / Reject organization service request
- Approve / Reject site codes for divisions of your org
- Approve / Reject user's service package requests
- Audit user grants
- Audit users in company (Quarterly & Annually)
- Delete a division in your org
- Delete a user account
- Edit organization and/or division profile
- Edit profile of others

- Generate a service summary report
- Generate report of user summary by organization
- Generate report of users' grants per svc. package
- Generate security administrator reports
- Grant a service package to a division in your org
- Grant a service package to a user
- Invite users to register
- Modify user roles
- Move a user
- Remove a service package from a division in your org
- Remove service package from a user

- Request a service package for my organization
- Reset password of others
- Search /View details for divisions in my organization
- Search for users in my organization
- Specify password for self
- Specify password of others
- Suspend a division in your org
- Suspend a user account
- View organization's hierarchy
- View request history of other

Edit Your User Profile

1. From the **My Profile** drop down menu, click **Edit my Profile**. The Edit Profile screen is displayed. All of the information associated with your user profile can be edited via this screen.

· information			
*	= required fields		
Status:	Active		The User ID can NEVER be
User ID:	CMISSX90		modified.
Company/Division Name:	Covisint		
Prefix:		(Mr., Mrs., Ms., Miss)	
*First Name:	Jane		
Middle Name:			
*Last Name:	,Doe		
Job Title:			Throughout this application,
*Address 1:	1 Campus Martius		hover your mouse over a
Address 2:			question mark icon to view help
Address 3:			text related to that field.
*City/Region:	Detroit		
*State/Province:	МІ		
*Postal Code:	48226		
*Country:	UNITED STATES	Image: A start of the start	The email address entered here i
*Phone Number:	313.227.7300	0	the email address where all
Mobile Phone Number:			system-related correspondence will be delivered, such as
Fax Number:	Line da la contra contra		registration approval, changes to
*Email Address:	jane.doe@yahoo.com		your profile or access. This is
Wireless Email Address:	(OMT 05:00) Factors Time (also the address where your
*Time Zone:	(GMT-05:00) Eastern Time (US & Canada)	password will be delivered if a
Language Preference:	English 💌		reset is necessary. Be sure to enter an email address to which
	Dog's name		you have access at any time.
*Challenge Question:			
	box above. Examples: What	is my Mother's Maiden Name	d to answer a challenge question based on what you input in the ? What was the name of my high school? There is a 255 character answer will be accessible to your Security Administrator.
	Coco Chanel		
*Challenge Answer			
			atch exactly what you input into the text box above. The answer answer will be accessible to your Security Administrator.

2. Modify the information as desired. Remember that required fields, identified with the bold, red font, red bar, asterisk, must be populated in order to save changes to your profile.



<u>Details about the Challenge Question and Challenge Answer fields</u>. Security questions are used to verify the identity of a user during password reset. You will be prompted to enter the answer to the security question you create in this field. Important to note that your answer must match exactly as entered here – including upper and lower case.

3. Click **Save Changes**. The changes are immediately applied to your profile, and a success message is displayed.

Result

You have successfully modified your user profile.

Request Service Packages



Service Package: a defined group of one or more applications. By requesting a service package, you can obtain access to additional applications.

1. From the **My Profile** drop down menu, click **Request Service Package**. The request service package screen is displayed.

Image: service packages request more info Content Management Applications Image: service package of content Management Applications available for those approved to access Image: service package of content Management, please select Image: service package of	est service package: Jane Doe Steps e following list contains all service packages currently offered by Covisint and other Covisint members. Please indicate the service packages you require by S = per user fees apply I = subscribed to by your parent company I = additional information need rvice packages request sub-package of Content Management. Please select a request a sub-package of Content Management, please select a request sub-package (application package) immer Management To request a sub-package of Content Management, please select a request sub-package (application package) immer Management Management To request a sub-package of Content Management, please select a request sub-package (application package) immer Management Management Management Package (application package) immer Management I I request more info instint Internal Applications KS - Covisint Internal Management Package (application package) ivisint Time Tracker more info ivisint Supplied Services ivisint Supplied Services	uest service package: Jane Doe			- Cov
The following list contains all service packages currently offered by Covisint and other Covisint members. Please indicate the service packages you required to be provided	e following list contains all service packages currently offered by Covisint and other Covisint members. Please indicate the service packages you require by king the buttons below: Image: select service packages request more info rvice packages request more info intent Management Applications access granted more info intent Management To request a sub-package of Content Management, please select a request sub-package (application package) more info immer Info request more info immer Corvisint Internal request more info wisint Time Tracker request more info wisint Supplied Services request more info				
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service packages request more info Content Management Applications Content Management Sub-packages are bundles of applications available for those approved to access content Management. To request a sub-package of Content Management, please select the 'request sub-package (application package) Image: Content Management is a sub-package of Content Management, please select the 'request sub-package (application package) Image: Content Management is a sub-package of Content Management, please select is a sub-package (application package) Image: Content Management is a sub-package of Content Management is a sub-package is a sub-package (application package) Image: Content Management is a sub-package is a sub-packa	rvice packages request more info Intent Management Applications access granted more info Intent Management Management Management Management, please select access granted more info intent Management To request a sub-package of Content Management, please select access granted more info intent Management To request a sub-package of Content Management, please select request sub-package (application package) more info immer Chrysler Content Management request more info visint Internal Applications sccss granted more info visint Internal request more info wisint Time Tracker request more info visint Supplied Services request more info	clicking the buttons below:			
Content Management Sub-packages are bundles of applications available for those approved to access Content Management. To request a sub-package of Content Management, please select the 'request sub-package (application package) access granted more info Image: request sub-package (application package) Image: request sub-package (application package) more info DaimlerChrysler Content Management Image: request sub-package more info Covisint Internal Applications Image: request sub-package more info CAS - Covisint Internal Image: request sub-package more info	Intent Management brpackages are bundles of applications available for those approved to access a request sub-package (application package of Content Management, please select a 'request sub-package (application package) access granted more info immlerChrysler Content Management Visint Internal Applications Immore info immore info visint Internal Visint Internal Immore info Immore info visint Time Tracker Immore info Immore info visint Supplied Services Immore info Immore info		bacribe		
Sub-packages are bundles of applications available for those approved to access Content Management. To request a sub-package of Content Management, please select im request sub-package (application package) DaimlerChrysler Content Management Imagement Covisint Internal Applications CAS - Covisint Internal Imagement Imagement Imagement Imagement Imagement Covisint Internal Applications Imagement Imagement Imagement	b-packages are bundles of applications available for those approved to access intent Management. To request a sub-package of Content Management, please select a 'request sub-package' link belov. imilerChrysler Content Management vision package) imilerChrysler Content Management vision package imilerChrysler Content Management vision package imilerChrysler Content Management vision package) is - Covisint Internal Applications VS - Covisint Internal vision visio vision vision vision vision vision vision	Content Management Applications			
DaimlerChrysler Content Management request more info Covisint Internal Applications Covisint Internal request more info	iminerChrysler Content Management visint Internal Applications VS - Covisint Internal visint Time Tracker visint Covisint Access visint Supplied Services	Sub-packages are bundles of applications available for those approved to access Content Management. To request a sub-package of Content Management, please select the 'request sub-package' link below.		access granted	more info
CAS - Covisint Internal request more info	AS - Covisint Internal			request	more info
	visint Supplied Services	DaimlerChrysler Content Management	•		
Contribut Time Transfort I more info	RID - Covisint Access request more info				
Covising Time Tracker	ivisint Supplied Services	Covisint Internal Applications			more info
GRID - Covisint Access request more info		Covisint Internal Applications CAS - Covisint Internal		request	
Covisint Supplied Services		Covisint Internal Applications CAS - Covisint Internal Covisint Time Tracker	>	request	more info
	ivisint Supplied Services	DaimlerChrysler Content Management Covisint Internal Applications			
Asset Recovery System S V request more info		Covisint Internal Applications CAS - Covisint Internal Covisint Time Tracker GRID - Covisint Access Covisint Supplied Services	>	request request request	more info

Note: the following symbols will help you understand attributes of certain packages:



- Packages already granted to your organization are denoted by a check mark.
- Packages that have associated fees are denoted with a dollar sign.



- 2. Click **request** next to the package you wish to request. **Note:** You can request Sub Packages of certain portals by clicking on the **request sub-package** link under the applicable Partner Portal Service. The request details screen is displayed.
- 3. Enter the reason for the request in the open text box. The request reason will help your administrator make appropriate decisions regarding your request.
- 4. Click **continue** to submit the request. Your request is routed to your administrator for approval
- 5. Repeat steps 1 4 as necessary to request additional service packages.

Result

You have successfully requested access to a service package.

Change Your Password

1. From the **My Profile** drop down menu, click **Change my Password**. The Change Your Password screen is displayed.

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GMozilla Firefox Star		Password Rules	
Covisint Enterprise Portal :: Covis	📴 Covisint Connection and Admin		
Covisint Connection and Administra	ition	 8 characters minimum, 20 character maximum must contain at least one non-alpha character (number or special character*) 	>
Home : My Profile : My Orga	nization :	 cannot be the same as the user ID cannot be repeated for a cycle of 7 password changes should be difficult to guess *allowable special characters: (numbers 0-9), ? >> 0 ∉ \$ ^ & * - ()_ / < (] + = ; !' 	s
Change Your Password		< > ! @ # \$ % ^ & * - () _ / \ { } [] + = ; ;	
Please enter a new password.			
change password			
*	= required fields		
*Current Password:		Done register.stg.covisint.com	
*New Password:		() show password rules	
*Re-enter New Password:		∇	
	st	ubmit password change	

It is important to change your password every 90 days to keep your account secure. You will be prompted by the system to change your password as the 90 day expiration date approaches. After 90 days, the system will force a password change during the login process.

Your password must adhere to Covisint security standards. You can view the password rules by clicking **show password rules** on the password-reset page, as displayed in the screen above.

- 2. In the Current Password open text field, key in your current password.
- 3. In the *New Password* open text field, create a new password that adheres to the Covisint password rules.
- 4. In the *Re-enter New Password* open text field, key in the newly created password to verify that you have typed it correctly.
- 5. Click **Submit password change**. The changes are immediately applied to your account.

Result

You have successfully changed your password.

Additional Profile Management Features

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iew profile for: Jane	Doe	· · · · · · · · · · · · · · · · · · ·	
	view profile	[view service packages
 edit user profile view pending requ 	> change user passwo Jests > view request history		 request service package email preferences
Detailed profile informat perform the activity indic	ion for this user ID is listed below. If you are able to perfo	orm updates or actions or	n this account, the option links below will allow you to
user status			
	Status Active		
user profile			
User Name	Jane Doe	User ID	CMISXA9A
Company/Division	Covisint	Job Title	сполнон
Address 1	1 Campus Martius	Email Address	jane.doe@yahoo.com
Address 2		Wireless Email Address	
Address 3		Phone Number	313.227.7300
City/Region	Detroit	Mobile Phone Number	
State/Province	MI	Fax Number	
Postal Code	48226	Language Preference	English
Country	UNITED STATES	Time Zone	(GMT-05:00) Eastern Time (US & Canada)
user assigned roles			
Role Name	Description	d	ate granted
	no role	is found	

If you wish to	Then
View your current service package grants	 Click My Profile menu. Click View my profile option.
	3. Click View service packages tab. The View service packages screen is displayed. From this screen, you are able to view packages and sub packages to which you currently have access. To view details of any service package grant, simply click the <i>package name</i> .
View user roles assigned to you	1. Click My Profile menu.
	2. Click View my profile option.
	 Scroll to the bottom of the screen to the 'user assigned roles' section to view the list.
View pending requests you have submitted	1. Click My Profile menu.

If you wish to	Then
	2. Click View my profile option.
	3. Click View pending requests . The View pending request screen is displayed. From this screen, you are able to view packages and sub packages to which you currently have access request pending.
Send a reminder to the administrator regarding a pending request	1. Click My Profile menu.
regarding a pending request	2. Click View my profile option.
	 Click View pending requests. The View pending requests screen is displayed.
	 Enable the checkbox of each request for which you wish to send a reminder.
	5. Click send reminder.
	6. Key in the reason for the reminder.
	7. Click submit . The reminder is sent to the appropriate Administrators.
Cancel a pending request	1. Click My Profile menu.
	2. Click View my profile option.
	 Click View pending requests. The View service packages screen is displayed.
	 Enable the checkbox of each request you wish to cancel.
	5. Click cancel pending request.
	 Click submit decision. The request is removed from the Administrator's queue.
Opt out of auto-generated email	(The system automatically sends email notifications for many items. You may

If you wish to	Then
	opt out of certain email notification by following the steps provided here)
	1. Click My Profile menu.
	2. Click View my profile option.
	 Click email preferences. The Update your email preferences screen is displayed.
	 Deselect the checkbox of each item for which you do not wish to receive notification. (You are not able to opt out of password reset emails for security reasons).
	5. Click Save changes.
View the history of your requests	
view the matery of your requests	1. Click My Profile menu.
	2. Click View my profile option.
	 Click view request history. A log of your request history is displayed. This log contains the request and approval dates, as well as the approver's name and decision

Result

You have successfully performed additional profile management options.

View Your Organization Profile

- 1. From the Home screen, click **My Organization**. The Organization Profile screen is displayed for the logged in user.
- 2. Click View my organization profile. Your Organization Profile Screen is displayed.

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				- Cov
ganization profile for:0	ovisint Jane	Doe		
view prof	ile	ĺ	view service packages	administrator
organization, you may use th	e option links bel	w to perform availab	le administrative tasks.	dministrators.If you are a Security Administrator for t
organization status within			tration	
	Status: 🗹 A	ctive		
stat	us options			
last quarterly	user audit 200	5.06.30 performed	by	
last annual user g	rant audit 2006	.06.20 performed by	EXCHNGOP1	
organization information				
	Name Covi	sint		
	Address 1 Ca	mpus Martius , Detro	it, MI 48226 UNITED STATES	
Phor	e Number 313-	227-7300		URL http://www.covisint.com
Fa	x Number			DUNS Number 0
administrator information	ı			
Name	Use	ID	Job Title	Phone Number
Julie Doe	julie:			313.555.1212
John Doe	iohr	201		313.555.1213

Result
You have successfully viewed organization profile details.

View Your Organization Services

- 1. From the Home screen, click **My Organization**. The Organization Profile screen is displayed for the logged in user.
- 2. Click View my organization services. Your Organization Services Screen is displayed.

ne 🗄 My Profile 🗄 My Organization 🗄				📗 Show side
w service packages for:Covisint				- Covi
view profile	view service packages		administra	tor
The following is the list of services currently granted to this he service package name. You may suspend / remove a se				
service package name		more info		date granted
Administration				, and a
Covisint (required)		more info	Active	2001.10.07 ED
Secure File Exchange Administration (Covisint Owne	:d)	more info	Active	2004.12.16 ES
Content Management Applications				
Content Management		more info	🖌 Active	2002.03.04 ES
DaimlerChrysler Content Management		more info	🗹 Active	2002.09.05 ED
Covisint Internal Applications				
CAS - Covisint Internal		more info	Active	2002.03.04 ES
Covisint Time Tracker		more info	Active	2004.01.27 ES
GRID - Covisint Access		more info	Active	2003.05.05 ED
Covisint Supplied Services				
Asset Recovery System		more info	🖌 Active	2003.08.13 ED
CATS		more info	Active	2004.05.04 ED
Covisint Connect		more info	Active	2003.08.26 ED

Click the + sign next to a service package to view additional portal customers that have a unique view of that service package. Some portal customers may have a 'customized' view of a given service package.

Result

You have successfully viewed your organization services.



Viewing Users in your Organization

There are two ways for an Administrator to access user accounts. Those are:

- View Users (generally used when quantity of users is less than 50)
- Search for users (generally used when quantity of users is greater than 50)

Complete the following steps to view users in your organization.

1. Click **View my Organization Users** from the *My Organization* drop down menu. The View Users screen is displayed.

wisint Cor	nnection and Ad	ministration			+ Home → Porta	l → Help → Contact Us → Logo
ome i I	My Profile 🕴 🛔	ly Organization	i Search i			🔳 Show side na
		View my Organizati	ion Profile			- Covisin
iew use	rs: Covisint	View my Organizat	ion Service Packages			
		View my Organizati	ion Hierarchy			
v	view profile	View my Organizati		w hierarchy	view users	administrator
		View my Organizati	ion Administrators			
-	ently registered of			w. Simply click on an indivi	dual name to view the detailed us	er profile.
searcl				w. Simply citely on an indivi-	dual name to view the detailed us Organization Na	
searcl	results	sers in the organizat	tion Covisint are listed belo			
searcl Status	results User Name	sers in the organizat	tion Covisint are listed belo User ID		Organization Na	
search Status	results User Hone (read-only), P	sers in the organizat	tion Covisint are listed belo User ID		Organization Na Covisint	
searcl Status V	results User North (read-only), P ston, Mel	sers in the organizat artner Assist	tion Covisint are listed belo User ID PASSIST		Organization Na Covisint Covisint	
searce Status	results User Market (read-only), P ston, Mel ston, Mel	ers in the organizat artner Assist e Admin	tion Covisint are listed belo User ID PASSIST STON1		Organization Na Covisint Covisint Covisint	

Use	r Status Icons Defined:
▼ × ™	 Active Status (user account is active) Rejected (user registration request was rejected) Permanently Removed (user account has been permanently removed from the system) Suspended (user account is suspended, and user cannot login until the account is unsuspended)

2. Optionally, click on a User Name to view details of that user profile.

Result
You have successfully viewed users for your organization.

Searching for Users in your Organization

Complete the following steps to search for users in your organization.

1. Click **Search for Users in my Organization** from the search drop down menu. The Search for Users screen is displayed.

Covisint Connection and Administration			▶ Home	→ Portal → Help	▶ Contact Us → Logout
Home : My Profile : My Organization : S	earch :	1000-11			📕 Show side nav
search for user	Search for Users in my Organia				- Covisint
organization nam Basic Search for User Search for users based on user profile information Basic Search for User		filter options to re	fine your seach, and click the	seach button.	
	required fields				
user name:	last name, first name 👱	begins with 💌		search tips	
filter options:	filter options (EXCLUDE these Active Permanently Removed	Per	nding	Suspended	0
results per page:	50 💌				
	search				

- 2. From the User Name drop box, select the search criteria regarding the user that you wish to search:
 - a. last name, first name
 - b. phone number
 - c. user id
 - d. email address
- 3. Select either 'begins with' or 'contains'.
- 4. Key in the search criteria in the open text box.
- 5. Optionally, narrow search results by enabling the checkbox of each filter you wish to apply. This will *exclude* the checked item from the search results.
 - a. Active
 - b. Pending
 - c. Suspended
 - d. Permanently Removed
 - e. Rejected
 - f. All divisions

6. Click Search. The Search results screen is displayed.

ome	🗄 My Profile 🗄 My Organia	zation : Search :			Show side n
earch	n for user				Covisin
The res	h for user ults of your search appear belo	zation name w. Click on a user name to view deta	ils. Scroll down to enter new se	arch criteria or click help for Search Tips.	
and the state	h results s User Name	User ID	Job Title		
Status	USET Name	User ID	JUD HILLE	Organization Name	
Status	Test, Teamroom	TRTESTI	Job Hde	Covisint	
		100000000000000000000000000000000000000	Job Hae	The second se	
1	Test, Teamroom	TRTESTI	300 1108	Covisint	
1	Test, Teamroom Test, Jane	TRTEST1 GOBLUE2006	Jub Hue	Covisint Covisint	
AA	Test, Teamroom Test, Jane test, rob	TRTEST1 GOBLUE2006 ROB717TEST3	Jub Hite	Covisint Covisint Covisint	
 S S	Test, Teamroom Test, Jane test, rob test, John	TRTEST1 GOBLUE2006 ROB717TEST3 ROB715TESTUSER2		Covisint Covisint Covisint Covisint	



Result
You have successfully searched for a user in your organization.

Resetting a User's Password

The following section describes the steps involved in resetting a user's password. The steps are similar to the steps a user would take if the user selected the *Forgot my password* link at the login screen.

After locating the user account via view or search (described in a previous section), the Security Administrator can reset the user's password using the steps below.



You may notice a "Specify Password" link in addition to the Reset Password option. The specify password process is less secure than the reset password process. It does allow the user assigned the Security Administrator role the ability to know the user's entire password and thus could be exposed to risk / liability. It is recommended that the Specify Password process be used only in exceptional circumstances and not as a general practice. Standard operating procedures should include resetting passwords and not specifying passwords.

1. Perform a User Search. <u>Refer to the previous section entitled Searching for Users in</u> <u>your Organization</u> for details. The User Search result screen is displayed.

ome : My Profile : My Organization : \$	Search :				I 5	how side
earch for user						- Covisi
organization nam search for user The results of your search appear below. Click on d		ll down to ente	r new search criteria c	or click help for Se	earch Tips.	
search results						
Status User Name	User ID	Job Title	0	Irganization Nan	ne	
X Abba Queen	TRAININGADMIN123		c	ovisint Europe		
Admin, Training	TRAININGADMIN		c	Covisint		
viewing 1 - 2 of 2					Show 50 🔊	🖉 per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatic	on. Enter the criteria, check any t	filter options to	refine your seach, and	d click the seach b		/ per pa
Viewing 1 - 2 of 2 Basic Search for User	on. Enter the criteria, check any t	filter options to	refine your seach, and	d click the seach b		per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatic Basic Search for User	required fields	filter options to begins with 💌	refine your seach, and trainingad	d click the seach b	utton.	per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatic Basic Search for User	required fields	oegins with 💌	trainingad	search	utton.	per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatio Basic Search for User user name:	required fields user id V t filter options (EXCLUDE these	begins with 💌	trainingad): iding	search	utton. h tips	per pa

2. Click on the user name of the user for whom you searched. The View Profile screen is displayed.

Covisint Connection and Ad	Iministration			⊁Home ≯Portal ≯Help	▶ Contact Us → Logout
Home i My Profile i N	4y Organization 🗄 S	earch : Administration :			📕 Show side nav
view profile for:Sproc	ket Admin				- Covisint
	view profile	ſ		view service packages	
 → edit user profile → add service packag → view request histor 		 reset user password modify roles move user 	>	 specify user password view pending requests 	
Detailed profile information perform the activity indice	on for this user ID is liste ated.	d below. If you are able to perfor	m updates or actions or	this account, the option links below v	vill allow you to
user status					
	Status	Active			
	view details	view details			
	status options	suspend user			
user profile					
User Name	Sprocket Admin		User ID	SPROCKETADMIN	
Company/Division	Covisint		Job Title		
Address 1	25800 Northwestern		Email Address	sproket.admin@yahoo.com	
Address 2			Wireless Email Address		
Address 3			Phone Number	333-3333	
City/Region	Southfield		Mobile Phone Number		
State/Province	MI		Fax Number		
Postal Code	48075		Language Preference	English	
Country	UNITED STATES		Time Zone	(GMT-05:00) Eastern Time (US & Ca	nada)

- 3. Click reset user password. The Reset User Password screen is displayed.
- 4. Validate the user's identity:
 - a. Read the "challenge question" to the user.
 - b. Ask the user for the answer to the question, and validate the answer to this question. It must match the answer exactly as it appears on the screen.
- 5. Click **Reset Password**. The screen is refreshed, and the first half of the new password is displayed.

Password Reset Successful
The password for Melanie SecurityAdmin1 has been successfully reset.
The first HALF of the randomly generated 8-character password is:
2896
The second HALF of the password has been emailed to the registered email address mabston@covisint.com. All 8 characters are needed to logon.
Please note that for legibility, the randomly generated password will be uppercase characters, and circular characters will always be the numeral zero. However, after successfully logging in with the randomly-generated password, the user may select any combination of characters in upper and lower case to create their new password.
return to user profile

- 6. Inform the user that you are going to provide the first half of the new password, and ask the user to write down this information.
- 7. Remind the user that passwords are case-sensitive.
- 8. Instruct the user to obtain the second half of the new password from the user's email account.
- 9. Inform the user that after logging in with this newly created, temporary password, the user is prompted / required to change the password.

Result

You have successfully reset a user's password.

Specifying a New Password

Security Administrators are able to specify a password for a user, only on an exception basis. As a standard procedure, the user should reset a password via the Reset Password functionality. However, when that is not possible, the Security Administrator can explicitly state a new password to a user.

After locating the user account, the user assigned the Security Administrator role can specify a new password for the user using the steps below



- 1. Perform a User Search. <u>Refer to the previous section entitled Searching for Users in</u> <u>your Organization for details</u>. The User Search result screen is displayed.
- 2. From the search results, click on the name of the user for whom you wish to specify a password. The User Profile screen is displayed.

visint Connection and A	dministration		+Home →Portal →Help →Contact Us →Logout
me 🗄 My Profile 🗄	My Organization : Search :		📕 Show side nav
ew profile for:Traini	ing User QE Quality Engineer		- Covisint
	view profile		view service packages
• reset user passwo	ord specify u	user password	
		able to perform updates or actions on	this account, the option links below will allow you to
perform the activity indic	ated.		
user status			
	Status Active		
user profile			
User Name	Training User QE Quality Engineer	User ID	TRAININGUSER
Company/Division			
	Covisint	Job Title	
Address 1	Covisint 25800 Northwestern		quality.engineer@yahoo.com
Address 1 Address 2			quality.engineer@yahoo.com
		Email Address Wireless Email	
Address 2	25800 Northwestern	Email Address Wireless Email Address	
Address 2 Address 3	25800 Northwestern Southfield	Email Address Wireless Email Address Phone Number Mobile Phone	
Address 2 Address 3 City/Region	25800 Northwestern Southfield MI	Email Address Wireless Email Address Phone Number Mobile Phone Number	313-555-1212

3. Click **specify user password**. The Specify User Password screen is displayed.

 step one: Read the challenge question to the us step two: 	used in exceptional situations. Password reset is always the preferred method. Iser via phone to confirm the user's identity. is answered correctly, you may continue by entering a new password and clicking on the submit password change button.
 Step one. Read the challenge question to the us step two: 	
Read the challenge question to the us step two:	
- step two:	is answered correctly, you may continue by entering a new password and clicking on the submit password change button.
- step two:	is answered correctly, you may continue by entering a new password and clicking on the submit password change button.
Whith fourthe an annual Thethe annualized i	is answered correctly, you may continue by entering a new password and clicking on the submit password change button.
•	
Please enter a new password for the over the phone.	userid TRAININGUSER. The password must be at least 8 characters in length and should be simple to communicate to the user
Please notify the user that they will b	be forced to change this password the first time they logon.
,	
change password	
* =	required fields
	om what High School did you graduate?
Challenge Answer: Rid	dgemont High School
*New Password:	() show password rules
*New Password:	
*Reason:	
	submit password change return to user profile

- 4. Validate the user's identity by prompting the user for the answer to the security question.
- 5. In the first *New password* open text field, key in a new password for this user. This password must adhere to the existing password rules, and should be simple to communicate to the user over the phone.
- 6. In the second *new password* open text field, key in the newly created password for this user.
- 7. State the password to the user and inform the user to write down this new, temporary password. Also inform users that they are forced to change this temporary password upon the next login.
- 8. Click submit password change.

Result

You have successfully specified a user's password.

Editing a User's Profile

Users are able and expected to manage their own profiles. However, the Security Administrator is able to update user's profiles as needed. Complete the following steps to edit a user's profile (user must belong to your organization).

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

	Search :		ана стана стана Стана стана стан		Show side
earch for user					- Covisi
organization nam earch for user he results of your search appear below. Click on (roll down to enter	new search criteria or cli	ick help for Search T	ips.
earch results					
Status User Name	User ID	Job Title	Orga	nization Name	
X Abba Queen	TRAININGADMIN123		Covi	sint Europe	
Admin, Training	TRAININGADMIN		Covi	sint	
1					
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatic	on. Enter the criteria, check an	filter options to r	efine your seach, and cliv		how 50 💌 per pa
Viewing 1 - 2 of 2 Basic Search for User	on. Enter the criteria, check an	filter options to r	efine your seach, and clic		how 50 💌 per pa
Basic Search for User Search for users based on user profile information	on. Enter the criteria, check and	filter options to r	efine your seach, and clic		how 50 💌 per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informatic Basic Search for User	And Charles and	r filter options to r begins with 💌	efine your seach, and clic trainingad		how 50 💌 per pa
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile information Basic Search for User	required fields	begins with 💌 from my results) 🔲 Pen	trainingad : ding	ck the seach button.	

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

ine i rij rionie i	My Organization 🗄 Sea	rch : Administration :		
w profile for:Spro	ket Admin			
	view profile	Ĺ		view service packages
• edit user profile	\supset	reset user password		view pending requests
iser status	Status 🗹	Active		
perform the activity indic	ated.			this account, the option links below will allow
	Status 🗹	Active		
	view details	view details		
	status options	suspend user		
user profile				
	Sprocket Admin		User ID	SPROCKETADMIN
User Name				
User Name Company/Division	Covisint		Job Title	
Company/Division	Covisint 25800 Northwestern			sproket.admin@yahoo.com
Company/Division				sproket.admin@yahoo.com
Company/Division Address 1			Email Address Wireless Email	
Company/Division Address 1 Address 2	25800 Northwestern		Email Address Wireless Email Address	
Company/Division Address 1 Address 2 Address 3	25800 Northwestern Southfield		Email Address Wireless Email Address Phone Number Mobile Phone	
Company/Division Address 1 Address 2 Address 3 City/Region	25800 Northwestern Southfield MI		Email Address Wireless Email Address Phone Number Mobile Phone Number	333-3333

3. Click edit user profile. The Edit User Profile screen is displayed.

	rent. Fields marked with an asterisk	(*) are required. Click Save Changes when finished.
r information *	= required fields	
Status:	Active	
User ID:	TRAININGADMIN	
Company/Division Name:	Covisint	
Prefix:		(Mr., Mrs., Ms., Miss)
*First Name:	Training	
Middle Name:		
*Last Name:	Admin	
Job Title:		
*Address 1:	20921 Lahser Rd	
Address 2:		
Address 3:		
*City/Region:	Southfield	
*State/Province:	МІ	
*Postal Code:	48034	
*Country:	UNITED STATES	
*Phone Number:	NA	0
Mobile Phone Number:		
Fax Number:		
*Email Address:	training.admin@covisint.com	
Wireless Email Address:		0
*Time Zone:	(GMT-05:00) Eastern Time (US	& Canada) 💌
*Language Preference:	English 🗸	

- 4. Edit the profile for the user selected as you wish. Required fields must be populated in order to apply the changes to this profile.
- 5. Click save changes.

Result

You have successfully edited a user's profile. The user will receive an email notification stating that their profile has been modified by the administrator.

Modifying a User's Role

Complete the following steps to modify a user's role. <u>(Refer to Figure 1 for role definitions)</u>.

- 1. Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.
- 2. Click on the *user name* of the user for whom you searched. The View Profile screen is displayed.

ne 🗄 My Profile 🗄	My Organization 🗄 Sea	rch : Administration :	Reports :	🔲 Show side
<i>a</i>	de la de de de			- Covi
w profile for:Spro	cket Admin			
	view profile		(view service packages
 edit user profile add service packa view request histo 		 reset user password woony roles > move user 	>	 specify user password view pending requests
Detailed profile informat erform the activity indi-		below. If you are able to per	form updates or actions o	n this account, the option links below will allow you to
user status				
	Status 🗹	Active		
	view details	view details		
	status options	suspend user		
user profile				
User Name	Sprocket Admin		User ID	SPROCKETADMIN
Company/Division	Covisint		Job Title	
Address 1	25800 Northwestern		Email Address	sproket.admin@covisint.com
Address 2			Wireless Email Address	
Address 3			Phone Number	333-3333
City/Region	Southfield		Mobile Phone Number	
State/Province	MI		Fax Number	
Postal Code	48075		Language Preference	English
Country	UNITED STATES		Time Zone	(GMT-05:00) Eastern Time (US & Canada)
user assigned roles				
Role Name	D	escription	da	ate granted
		no role	e is found	

3. Click **modify roles**. The Modify Roles Granted to User screen is displayed.

	My Profile : My Org	janization : Search : Administration : Reports :	Show side
difty n	oles granted to the	selected user	Security Admin Abston - Cov
anyn	ores granted to the		
heck o	or Uncheck Roles as nece	issary to modify the grants for this User. Click Submit when finish	ed. To clear any changes, click Undo Changes.
iser ii	nformation		
User N	lame	Sprocket Admin	
User I	D	SPROCKETADMIN	
Organi	ization Name	Covisint	
	ser roles Role Name	Role Description	Privileges
select	Role Name	Kole Description	Privileges
	Company Password Administrator	Allows User to Reset Password, no other major admin functions	Reset Password View Hierarchy Specify User Password
	Company Service Administrator	Company Administrator for selected services only	Security Admin - Grant Division Package Security Admin - Orant User Package Security Admin - Suspend Package from Division Security Admin - Permanently Remove Division Package Security Admin - Permanently Remove User Package Security Admin - Request Package For Division Security Admin - View User Reports
	Security Administrator	Administrator for an Organization's Users	Permanently Remove User Grant Suspend Division Suspend Service From Division Edit User Edit Organization Reset Password Invite Users View Hierarchy Specify User Password Administer Packages granted to my Org Security Admin - Grant Division Package Security Admin - Grant Division Package Security Admin - Grant Division Package Security Admin - Server Package from Division Security Admin - Permanently Remove User Package Security Admin - Permanently Remove User Package Security Admin - Apernove User Security Admin - Apernove User Security Admin - Apernove User Security Admin - Apernove Division Security Admin - Apernove Division Security Admin - Apernove Division Security Admin - New User Reports Grant All Sharable Roles
	Service Administrator	Company Delegated Service Administrator Role	Grant Administer All Company Owned Packages SO Grant Organization Package SO Suspeend Package From Organization SO Suspeend Package From Division SO Permanently Remove Package From Division SO Permanently Remove Package From User
V	User Account Administrator	The User Account Administrator can approve and reject New User account requests, but cannot grant any service packages to users via this role. The User ID Administrator can also reset user passwords and suspend or inactivate any user in the organization.	Permanently Remove User Suspend User Edit User Reset Password Invite Users Security Admin - Approve User

- 4. Enable the checkbox of each role you wish to grant to the user.
- 5. Click **submit**.
- 6. Click **OK** to confirm.

Result

You have successfully modified a user's role. The user will receive an email notification stating that the role has been modified by the administrator.

Moving a User

Complete the following steps if you wish to move a user to a different division so that they can be managed by a different administrator.



In order to move a user, you must be the administrator at or above the current and target organizations / divisions involved in the move.

- Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.
- 2. Click on the user name of the user for whom you searched. The View Profile screen is displayed.

me 🗄 My Profile 🗄	My Organization 🗄 S	earch : Administration :	Reports :	Show side na
ew profile for:Spro	cket Admin			- Covisint
en prome for opro-			v	
	view profile			view service packages
 edit user profile add service packa view request histo 		 reset user password modify roles move user 	>	→ specify user password→ view pending requests
Detailed profile informat perform the activity indi		ed below. If you are able to per	form updates or actions o	n this account, the option links below will allow you to
user status				
	Status	Active		
	view details	view details		
	status options	suspend user		
user profile				
User Name	Sprocket Admin		User ID	SPROCKETADMIN
Company/Division	Covisint		Job Title	
Address 1	25800 Northwestern		Email Address	sproket.admin@covisint.com
Address 2			Wireless Email Address	
Address 3			Phone Number	333-3333
City/Region	Southfield		Mobile Phone Number	
State/Province	MI		Fax Number	
Postal Code	48075		Language Preference	English
Country	UNITED STATES		Time Zone	(GMT-05:00) Eastern Time (US & Canada)
user assigned roles				
Role Name		Description	d	ate granted
		no role	is found	

3. Click move user. The Move User screen is displayed.

Home : My Profile : <mark>My Organization</mark> : Search : Admin	nistration : Reports :	📕 Show side nav
move user > Sprocket Admin		Security Admin Abston - Covisint
Select the target organization to move this user into.		
available target organizations		
O A Materials Co. 123 Main St., Toledo, OH 12345		
AA Materials Co. 124 Main St., Toledo, OH 12345		
AAA Materials Co. 150 Main St., Toledo, OH 12345		
O BB Materials Co. 125 Main St., Toledo, OH 12345		
O BBB Materials Co. 151 Main St., Toledo, OH 12345		
O CC Materials Co. 126 Main St., Toledo, OH 12345		
O CCC Materials Co. 152 Main St., Toledo, OH 12345		
Viewing 1 - 50 of 93	page: 1 2 next »	Show 50 💌 per page
	continue	

- 4. Enable the radio button of the target for this user.
- 5. Click **continue**.



In the event that this user currently has access to grants that the target organization does not have, then moving this user will auto-grant the additional service packages to the target organization. If this is the case, and you are satisfied, click continue. The following is an example of the screen warning:

Please read the following warnings carefully befo	re continuing.
grants that the target organization does no	ot have
This user currently has access to grants that the	target organization does not have:
 Covisint Connect 	
🚹 Warning! Moving this user grants these	service packages to the target organization.
	continue

6. Click **OK** to confirm.

 Result

 You have successfully moved a user. The user will receive an email notification stating this move/

Granting a Service Package or Sub-Package to a User in your Organization

Packages are grantable groups of one or more applications. Some Service Packages contain Sub-Packages. Sub-packages are designed such that the parent package must be granted before the sub-packages become available.

	ce Package – a grantable container that contains at least one application or ccessed via Covisint portal. Some Service Packages contain sub-packages.
applic	ackage – a grantable container that contains at least one sub-service ation. The sub-package requires that the parent package be granted first. ample, Covisint provides an application called Content Management.
-	Customer A has purchased from Covisint a version of Content Management customized with Customer A's logo.
-	Customer B has purchased from Covisint a version of Content Management customized with Customer B's logo.
-	Customer C has purchased from Covisint a version of Content Management customized with Customer C's logo.
Mana appro the us	must be approved access to the Service Package called "Content gement", and then must request access to the sub-package for the priate 'customer version' of the Content Management Application. Therefore, er would perform the following process to gain access to a 'customer version' application:
1.	request access to service package Content Management Service Package.
2.	receive approval for service package Content Management Service Package.
3.	request access to sub-package "Customer-C Content Management"
4.	receive approval for sub-package "Customer-C Content Management"

Complete the following steps to grant service packages to users in your organization.



You are only able to grant service package(s) to which your organization has access.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

me i	My Profile 🗄 My Organiza	tion : Search :		Show side n
earch	for user			- Covisir
	for user	tion name Click on a user name to view details. S	croll down to enter new search cr	iteria or click help for Search Tips,
earch	n results			
Status	User Name	User ID	Job Title	Organization Name
X	Abba, Queen	TRAININGADMIN123		Covisint Europe
	Abba, Queen			
Ø	Admin, Training	TRAININGADMIN		Covisint
Viewing Basi Searc	Admin, Training 1 1 - 2 of 2 c Search for User		y filter options to refine your sea	Covisint Show 50 v per pag
Viewing Basi Searc	Admin, Training 1 1 - 2 of 2 C Search for User h for users based on user profile	TRAININGADMIN	ny filter options to refine your sea	Covisint Show 50 v per pag
Viewing Basi Searc	Admin, Training 1 1 - 2 of 2 c Search for User h for users based on user profile c Search for User	TRAININGADMIN	ny filter options to refine your sea	Covisint Show 50 v per pag
Viewing Basi Searc	Admin, Training 1 - 2 of 2 c Search for User h for users based on user profile c Search for User use	TRAININGADMIN	begins with 💌 Irainingad	Covisint Show 50 v per pag
Viewing Basi Searc	Admin, Training 1 - 2 of 2 c Search for User h for users based on user profile c Search for User use	TRAININGADMIN information. Enter the criteria, check ar required fields er name: user id options: filter options (EXCLUDE thes	begins with trainingad te from my results): Pending	Covisint Show 50 v per pag ch, and click the seach button.

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

isint Connection and Ad	ministration		>Home →Portal >Help →ContactUs >Logo
me i My Profile i I	My Organization : Search : Administration :	Reports :	📕 Show side n
ew profile for:Traini	ng Admin		- Covisin
	view profile	1	view service packages
• add service packa	ge view pending requ	ests	view request history
user profile			
User Name	Training Admin	User ID	TRAININGADMIN
Company/Division	Covisint	Job Title	
Address 1	20921 Lahser Rd	Email Address	training.admin@covisint.com
Address 2		Wireless Email Address	
Address 3		Phone Number	NA
City/Region	Southfield	Mobile Phone Number	
State/Province	MI	Fax Number	
State/Province Postal Code		Fax Number Language Preference	

3. Click **add service package**. A list of all Services Packages to which your organization has access.

ne : My Profile : My Organization : Search : Adminis d service package: Training Admin		s	Show side - Covis teps: -1-2-0-
The service packages available to grant to Training Admin are listed b			
If you wish to grant a service package, simply click the 'add' button n the 'more info' link. Partner Portals Jsers may also be granted access to Covisint's Partner Supplier Porta portals, you may assign sub-packages by clicking on the 'sub-package	ils and their sub-packages from this page. If your		
the 'more info' link. Partner Portals Jsers may also be granted access to Covisint's Partner Supplier Porta	ils and their sub-packages from this page. If your		
he 'more info' link. Partner Portals Jsers may also be granted access to Covisint's Partner Supplier Porta sortals, you may assign sub-packages by clicking on the 'sub-package service packages	Is and their sub-packages from this page. If your es' button under the 'key portals' sub-heading.	organization subscribes t	o one of the partner more info
he 'more info' link. Partner Portals Jsers may also be granted access to Covisint's Partner Supplier Porta portals, you may assign sub-packages by clicking on the 'sub-package service packages Content Management Applications	Is and their sub-packages from this page. If your es' button under the 'key portals' sub-heading.	organization subscribes t	o one of the partner
he 'more info' link. Partner Portals Jsers may also be granted access to Covisint's Partner Supplier Porta Jsortals, you may assign sub-packages by clicking on the 'sub-package	Is and their sub-packages from this page. If your es' button under the 'key portals' sub-heading.	organization subscribes t	o one of the partner more info

- 4. Enable the checkbox of each service package you wish to grant to this user.
- 5. Click Add checked...



Some sub-packages may require additional Site Codes. Sub-packages that require additional Site Codes are denoted with the barcode icon. To request site codes, which may be associated with certain service packages or sub-packages, click on the sub-package name to view the details. Click **View Current Site Codes** to view the codes currently associated with this sub-package or click **Request Site Code** to request access to additional codes. Once you have requested access to site codes, your request will be routed to your administrator for approval.

- 6. Click continue
- 7. Click submit.

Result

You have successfully granted service package(s) to a user in your organization.
Removing a Service Package from a User in your Organization

Complete the following steps to remove service package(s) from users in your organization.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

	ion		
ome 🗄 My Profile 🗄 My Orgar	nization : Search :		📕 Show side n
earch for user			- Covisir
		_	
search for user	nization name Iow. Click on a user name to view details. So	croll down to enter new search c	riteria or click help for Search Tips,
search results			
Status User Name	User ID	Job Title	Organization Name
X Abba Queen	TRAININGADMIN123		Covisint Europe
Viewing 1 - 2 of 2	TRAININGADMIN		Covisint Show 50 v per pag
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user pro	TRAININGADMIN	y filter options to refine your sea	Show 50 💌 per pag
Viewing 1 - 2 of 2 Basic Search for User		y filter options to refine your sea	Show 50 💌 per pag
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user pro	file information. Enter the criteria, check an	y filter options to refine your set begins with 💌 trainingad	Show 50 💌 per pag
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user pro Basic Search for User	file information. Enter the criteria, check an required fields user name: user id ilter options: filter options (EXCLUDE thes Active	begins with V trainingad e from my results): Pending	Show 50 v per pag ach, and click the seach button. search tips Suspended
Viewing 1 - 2 of 2 Basic Search for User Search for users based on user pro Basic Search for User	file information. Enter the criteria, check an required fields user name: user id viter options: filter options (EXCLUDE thes	begins with V trainingad e from my results): Pending	Show 50 v per pag ach, and click the seach button.

2. Click on the user name of the user for whom you searched. The View Profile screen is displayed.

me 🗄 My Profile 🗄 My Orga	anization : <mark>Search</mark> : Adm	inistration :	Reports :			Show sid
ew service packages for:	Training Admin					- Cov
	view profile		ſ	view service	packages	
• add service package	+ view	pending reque	sts	view reque	et history	
The service packages currently g	ranted to this user ID are listed b	elow. The servi	ce packages a	are organized by Category.		
Click on a Service Package Name access from this user ID.	to view details about the service	e package.Admir	histrators may	y click on a service package name	to remove the servic	e package
					Ø =	= uses site cod
service package name	home location code	more info	status	status for organization	date granted/	updated
Covisint Supplied Services						
		more info	Active	Active	2007.01.10 EST	

3. Click **view service packages** tab. A list of all Services Packages assigned to this user is displayed.

ew service packages for: Jane Doe		Cov
view profile	view service packag	jes
+ add service package + view pendir	requests • view request histo	гу
The service packages currently granted to this user ID are listed below	he service packages are organized by Category.	
Click on a Service Package Name to view details about the service pac access from this user ID.	ge.Administrators may click on a service package name to re	move the service package
		I = uses site cod
service package name home	cation code more info status status for organizati	on date granted/updat
Administration		

4. Click on the *name of the service package* you wish to remove from this user. The Service Package Details screen is displayed.

visint Connection and Administration		→ Home → Portal → Help → Contact Us → Logout
ome 🗄 My Profile 🗄 My Organizati	on : <mark>Search</mark> : Administration : Reports :	📕 Show side nav
ecure File Exchange Administra	ation (Covisint Owned) details for: Jane Doe	Service Admin Covisint
	service package Secure File Exchange Administration (Cov uspended. If a package is suspended, it is unaccessible to tl	
view user profile	view user service package list	
service package status		
	status 🗹 Active	
	permanently remove service package	
service package information		
	description Secure File Exchange Administration (Covisin	at Owned)
A Service Package may consist of one o service name	ure File Exchange Administration (Covisint r many services. The services included in this Service Pack. r	
Covisint Supplied Services		nove infe
Secure File Exchange Administration		nore info

5. Click **permanently remove service package.** The Enter Removal Reason screen is displayed.

me : My Profile : My Organization : 9	Search : Administration : Reports :					w side na
ermanently Remove User Access > Er	nter Removal Reason		Se	rvice A	dmin abston -	Covisin
You have selected to remove Melanie Abston 's a a removal reason in the box(es) below. This reas	access to the following service/sub-service package(s). A removal rea son will be logged.	ison must	be enter	ed bef	ore submitting	
removal reason(s)						
service/sub-service package name	removal reason*					
Secure File Exchange Administration (Covisint Owned)		<				
	user notifying them of the status change					
Check this box to generate an email to the						

- 6. In the *removal reason* open text box, key in the reason for removing the service package from the user. (The text you enter in this box becomes part of this user's permanent record, and is viewable by all Security Administrators in your company).
- 7. Optionally, enable the checkbox if you wish to send an auto-generated email to the user, informing the user of the removal of the service package. The text you entered in step 6 will be included in the email.
- 8. Click **continue**. The Removal Confirmation Screen is displayed.

Result

You have successfully removed service package(s) from a user in your organization. If you wish to remove additional packages for this user, **click view user service package list** from the confirmation screen, and repeat steps 4 - 8 above.

Suspending a User's Account

A suspended account is one whose package grants, roles, etc., remain in tact, but the user is unable to login. For example, organizations may suspend an account of users that are going on extended leave of absence and will not need to login to their accounts. A suspension reason is required and is logged upon completion, and is viewable by Security Administrators in the organization. Complete the following steps to suspend a user's account

If you are required to suspend users in bulk, proceed to the section entitled <u>performing</u> <u>user audits</u>.



Suspended account: A suspended account is one whose package grants, roles, etc., remain in tact, but the user is unable to login.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

lome : My Profile : My Organization :	Search :							w side n
search for user								Covisin
organization nan search for user The results of your search appear below. Click on		roll down to enter	r new search criteria	or click h	elp for Se	arch Tips.		
search results								
Status User Name	User ID	Job Title		Organiza	tion Nam	e		
X Allo, Queen	TRAININGADMIN123			Covisint E	urope			
Admin, Training	TRAININGADMIN			Covisint				
1								
Viewing 1 - 2 of 2 Basic Search for User						Show 5	0 💌 1	per pag
	on. Enter the criteria, check any	filter options to	refine your seach, a	nd click the	e seach bu			per pag
Basic Search for User Search for users based on user profile informati		filter options to	refine your seach, a	nd click th	e seach bu		0 💌 1	per page
Basic Search for User Search for users based on user profile informati Basic Search for User	required fields	filter options to begins with 💌	refine your seach, a trainingad	nd click the	e seach bu	itton.	0	per pag
Basic Search for User Search for users based on user profile informati Basic Search for User	required fields	begins with 💌 from my results 🔲 Per	trainingad): nding	nd click the	search	tton.	0	per pag

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

Covisint Connection and A	dministration			▶ Home	▶ Portal	> Help	→ Contact Us	▶ Logout
Home : My Profile :	My Organization 🗄 S	earch : Administration :					🔳 Sho	w side nav
view profile for:Spro	cket Admin							Covisint
	view profile	[view service	e packag	jes		
 edit user profile move user 		▸ reset user password		view pend	ing requ	iests		
perform the activity indic		d below. If you are able to perform	n updates or actions or	this account, the o	ption link	s below	will allow you	to
user status		Active						
		1						
	view details	view details						
	status options	suspend user						
user profile								
User Name	Sprocket Admin		User ID	SPROCKETADMIN				
Company/Division	Covisint		Job Title					
Address 1	25800 Northwestern		Email Address	sproket.admin@	covisint.	com		
Address 2			Wireless Email Address					
Address 3			Phone Number	333-3333				
City/Region	Southfield		Mobile Phone Number					
State/Province	MI		Fax Number					
Postal Code	48075		Language Preference	English				
Country	UNITED STATES		Time Zone	(GMT-05:00) Easte	ern Time	(US & C	anada)	

3. Click **suspend user**. The Suspend User screen is displayed.

ne : My Profile : My Organization : Search : Administration :	Show side n
uffere Anne en des of Technics Aduste	- Covisin
nfirm Suspension of Training Admin	
You have selected to suspend Training Admin. Suspending a user prevents the user from logging on until the suspension is lifted.	
This will lock out the user. Are you sure you wish to suspend Training Admin?	
	* required fields
suspension reason	
* Enter a suspension reason in the box below. This reason will be logged.	
yes, suspend user no, cancel the suspension	

- 4. Key in the reason for suspending the user account in the open text box.
- 5. Click yes, suspend user.

Result	
You have successfully suspended a user's account. The user will receive an email notification of the suspension, and is no longer able to login to the portal.	า

Unsuspending a Suspended User Account

Complete the following steps to reverse the suspension on a user account.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

ome : My Profile : My Organization :	Search		Show side
earch for user			- Covis
organization nar search for user he results of your search appear below. Click on		icroll down to enter ne	ew search criteria or click heln for Search Tins.
earch results			
itatus User Name	User ID	Job Title	Organization Name
X Alle Queen	TRAININGADMIN123		Covisint Europe
Admin, Training	TRAININGADMIN		Covisint
			Show 50 v per pa
iewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informat	ion. Enter the criteria, check a	ny filter options to refi	
viewing 1 - 2 of 2	-	ny filter options to refi	
viewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informat Basic Search for User	required fields		
iewing 1 - 2 of 2 Basic Search for User Search for users based on user profile informat Basic Search for User	required fields	begins with 💌 tr se from my results): Pendir	ne your seach, and click the seach button.

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

Home : My Profile :	My Organization 🗄 S	earch : Administration :		📕 Show side nav
view profile for:Train	ing Admin			- Covisint
view profile for. fram	•		Y	
	view profile			view service packages
view pending requ	uests			
Detailed profile informati perform the activity indic		d below. If you are able to perfo	orm updates or actions or	this account, the option links below will allow you to
user status				
	Status	Suspended Suspended		
	view details	view details		
	statu: options	unsuspend user	\supset	
	status options	permanently remove user		
user profile				
	Training Admin		User ID	TRAININGADMIN
Company/Division	-		Job Title	
Address 1	¥21 Lahser Rd		Email Address	training.admin@covisint.com
Address 2			Wireless Email Address	
Address 3			Phone Number	NA
City/Region	Southfield		Mobile Phone Number	
State/Province	MI		Fax Number	
Postal Code	48034		Language Preference	English
Country	UNITED STATES		Time Zone	(GMT-05:00) Eastern Time (US & Canada)

3. Click **unsuspend user**. The Confirm Activation of User screen is displayed.

Home : My Profile : My Organization : Search : Administration :	📕 Show side nav
Confirm Activation of Training Admin	- Covisint
You have selected to activate Training Admin. Activating a user allows the user to login.	
This will unlock the user. Are you sure you wish to activate Training Admin?	
	* required fields
activation reason * Enter an activation reason in the box below. This reason will be logged.	
Litter an activation reason in the box below. This reason will be logged.	
yes, activate user no, cancel the activation	

- 4. Key in the reason for activating the user account in the open text box.
- 5. Click yes, activate user.

 Result

 You have successfully unsuspended a user account. The user will receive an email notification of the status change, and is now able to login to the portal.

Permanently Removing (Terminating) a User Account

The act of permanently removing a user is permanent (cannot be undone) and forever restricts the user account from being used. Users that are permanently removed will lose all roles, all service packages, and will never be able to login to that account.



You are not able to terminate a user if that user is the only person assigned the Security Administrator role. You must first modify the role of another user and assign the Security Administrator role.

If the user you wish to terminate is the sole Security Administrator and sole user, and there are no other users in that company, you will not be able to terminate the user. You will instead terminate the company. Only the Security Administrator for your organization can terminate a company.



Only suspended user accounts may be removed from the CCA system. <u>Refer</u> to the section entitled Suspending a User Account for details.



Permanently Removed User Account: A user account that can never be used to login. Typically, the permanently remove function is used when a user leaves the company and is not expected to return.

A removal reason is required and is manually entered. The termination reason becomes part of the user's permanent record, and is viewable by other Security Administrators for that company.

Complete the following steps to permanently remove a user's account.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

ome : My Profile : My Organization :	Search : Administration :		📕 Show side
			- Covi
earch for user			
organization na	ime	1	
earch for user			
he results of your search appear below. Click o	n a user name to view details. Scro	oll down to enter new search cri	teria or click help for Search Tips.
search results			
status User Name	User ID	Job Title	Organization Name
🛇 Admin, Training	TRAININGADMIN		Covisint
reving 1 - 1 of 1			Show 50 💌 per p
Viewing 1 - 1 of 1			Show 50 💌 per p
Basic Search for User			Show 50 💌 per p
	tion. Enter the criteria, check any f	filter options to refine your seac	
Basic Search for User	tion. Enter the criteria, check any t	filter options to refine your seac	
Basic Search for User Search for users based on user profile informa Basic Search for User	tion. Enter the criteria, check any t	filter options to refine your seac	
Basic Search for User Search for users based on user profile informa Basic Search for User	* required fields	filter options to refine your sead begins with 💌 admin, tr	
Basic Search for User Search for users based on user profile informa Basic Search for User		egins with 💌 admin, tr from my results):	ch, and click the seach button.
Basic Search for User Search for users based on user profile informa Basic Search for User user name		pegins with 💌 admin, tr from my results): Pending	ch, and click the seach button. search tips Suspended
Basic Search for User Search for users based on user profile informa Basic Search for User user name		egins with 💌 admin, tr from my results):	ch, and click the seach button.
Basic Search for User Search for users based on user profile informa Basic Search for User user name		pegins with 💌 admin, tr from my results): Pending	ch, and click the seach button. search tips Suspended
Basic Search for User Search for users based on user profile informa Basic Search for User user name filter options		pegins with 💌 admin, tr from my results): Pending	ch, and click the seach button. search tips Suspended

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

Home 🗄 My Profile 🗄	My Organization 🗄 S	earch : Administration :		📕 Show side nav
				- Covisint
view profile for:Train	ing Admin			
	view profile		ſ	view service packages
> view pending requ	iests			
Detailed profile informati perform the activity indic		d below. If you are able to per	form updates or actions or	this account, the option links below will allow you to
user status				
	Status	Suspended		
	view details	view details		
	status options	unsuspend user		
	status options	permanently remove user	>	
user profile				
User Name	Training Admin		User ID	TRAININGADMIN
Company/Division	Covisint		Job Title	
Address 1	921 Lahser Rd		Email Address	training.admin@covisint.com
Address 2			Wireless Email Address	
Address 3			Phone Number	NA
City/Region	Southfield		Mobile Phone Number	
State/Province	MI		Fax Number	
Postal Code	48034		Language Preference	English
Country	UNITED STATES		Time Zone	(GMT-05:00) Eastern Time (US & Canada)

3. Click **permanently remove user**. The Confirm Permanent Removal of User screen is displayed.

onfirm Permanent Removal of Training Admin	
You have selected to permanently remove Training Admin. This will eliminate all Covisint access. This user will need to re-register in ord	ar to logon in the future.
This will remove the user. Are you sure you wish to permanently remove Training Admin?	
	* required fields
permanent removal reason	· required fields
* Enter an removal reason in the box below. This reason will be logged.	
\Box Check this box to generate an email to the user notifying them of the status change	
yes, permanently remove user no, cancel the permanent removal	

4. Key in the reason for removing the user account in the open text box.



Recall that the act of termination is permanent (cannot be undone) and forever restricts the user from logging in to the account.

5. Click yes, permanently remove user.

Result

You have successfully removed the user account from the CCA system. The user is not able to login to the portal, and can not be reactivated.

Viewing a User's Pending Requests

Administrators receive email alerts when a new request is submitted. Within the email is a link that takes the Administrator straight to the pending request screen. Alternately, Administrators may complete the following steps to view a user's pending request.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

	Connection and Administration				_	_	▶ Contact Us	_
ome i	: My Profile 🗄 My Organ	ization : Search	: Administration	E Reports			📕 Shov	i side na
earch	n for user					Service A	Admin abston -	Covisint
	organ 1 for user ults of your search appear bel	ization name		٦		hala (an Oanach)		
	n results	ow. Click on a user ha	inte to view details, sci	roll down to enter new se	arch chteria or click	nerp for search	nps.	
status	User Name	User ID	J	lob Title	Organization	n Name		
\checkmark	Admin, Training	TRAINING	ADMIN		Covisint			
-	g 1 - 1 of 1					s	how 50 💌 p	er pag
Basi Searc	-	_		\boldsymbol{y} filter options to refine \boldsymbol{y}_i	our seach, and click			er page
Basi Searc	i c Search for User ch for users based on user pro ic Search for User	* require	ed fields			the seach button.		er page
Basi Searc	ic Search for User ch for users based on user pro ic Search for User	* require	<mark>ed fields</mark> ame, first name ♥ k	pegins with 💌 🛛 admin, t				er page
Basi Searc	ic Search for User ch for users based on user pro ic Search for User	* require	ed fields ame, first name 💌 上 otions (EXCLUDE these	pegins with 💌 🛛 admin, t		the seach button.		er page
Basi Searc	ic Search for User ch for users based on user pro ic Search for User	* requir user name: last na ter options: filter op Ad	ed fields ame, first name 💌 上 otions (EXCLUDE these	pegins with 💌 admin, t from my results): Pending		the seach button.		er page
Basi Searc	ic Search for User ch for users based on user pro ic Search for User fil	* requir user name: last na ter options: filter op Ad	ed fields ame, first name V b tions (EXCLUDE these tive rmanently Removed	pegins with 💌 admin, t from my results): Pending		the seach button.		er page

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**). The View Profile screen is displayed.

ovisint Connection and Ad	dministration		+Home →Portal →Help →ContactUs →Logout
lome i My Profile i	My Organization : <mark>Search</mark> : Administration : Re	eports :	📕 Show side nav
view profile for:Train	ing Admin		Service Admin - Covisint
	view profile		view service packages
• add service packa	age view pending requests	>	view request history
user status	Status 🗹 Active		
user profile	Training Admin	liser ID	TRAININGADMIN
Company/Division		Job Title	
	921 Lahser Rd	Email Address	training.admin@covisint.com
Address 2		Wireless Email Address	
Address 3		Phone Number	NA
City/Region	Southfield	Mobile Phone Number	
State/Province	MI	Fax Number	
Postal Code	48034	Language Preference	English
Country	UNITED STATES	Time Zone	(GMT-05:00) Eastern Time (US & Canada)

3. Click **view pending requests.** A list of all pending service package requests is displayed.

u Den die e De musiche femure en music		Service Admin	- Covis
w Pending Requests for: TRAINING ADMIN			
he following requests are currently pending approval. The approp	wiste administratory ware patified by amail at the i	time of submission	
ne following requests are currently pending approval. The approp	priate administrators were notified by email at the	time of submission.	
	· · · · · · · · · · · · · · · · · · ·		
hending requests	,		
pending requests	request	Date Submitted	
request type	request	Date Submitted	
	request Library Services - GSS	Date Submitted 2007.01.10 EST	
request type			

Result

You have successfully viewed pending service package requests for a user in your organization. If you wish to approve the request from this screen, click on the request name in the request type column.

Click here to view work steps for approving pending requests.

Viewing a User's Request History

Complete the following steps to view a user's request history.

 Perform a User Search. <u>Refer to the previous section entitled Searching for</u> <u>Users in your Organization for details</u>. The User Search result screen is displayed.

Covisint Connection and Administration			≻H	ome ≯Portal	▶ Help	▶ Contact Us	▶ Logout
Home 🗄 My Profile 🗄 My Organization 🗄 🤅	Search : Administration	: Reports :				🔳 Sho	w side nav
search for user					Service A	dmin abston -	Covisint
organization nam search for user The results of your search appear below. Click on		Gcroll down to ente	er new search criteria or	click help for	Search 1	Tips.	
search results Status User Name	lser ID	Job Title	Organiz	ation Name			
	RAININGADMIN		Covisint				
Viewing 1 - 1 of 1					st	how 50 🔽 (per page
Basic Search for User Search for users based on user profile informati Basic Search for User	ion. Enter the criteria, check a	ny filter options to) refine your seach, and	click the seach	n button.		-
user name:	last name, first name 🛩	begins with 💌	admin, training	searc	h tips		
filter options:	filter options (EXCLUDE the:		s): nding	🔲 Sus	pended		
	Permanently Remove	d 📃 Rej	ected	🔲 All d	livisions	?	
results per page:	50 🐱						
	search						

2. Click on the user name of the user for whom you searched. (This example uses a user named **Admin, Training**) The View Profile screen is displayed.

ne 🗄 My Profile 🗄 🛛	My Organization : Search : Administration :	Reports :	📕 Show side i
w profile for: TRAI	NING ADMIN		Service Admin - Covisi
	view profile	[view service packages
• add service packa	ge • view pending reques	its	view request history
Detailed profile informati perform the activity indic user status	on for this user ID is listed below. If you are able to perfo ated.	orm updates or actions or	this account, the option links below will allow you to
	Status Active		
user profile			
User Name	Admin, Training	User ID	trainingadmin
Company/Division	Covisint	Job Title	
Address 1	1 Campus Martius	Email Address	training.admin@covisint.com
Address 2		Wireless Email Address	
Address 3		Phone Number	313.227.7300
City/Region	Detroit	Mobile Phone Number	
State/Province	MI	Fax Number	
Postal Code	48226	Language Preference	English
Country	UNITED STATES	Time Zone	(GMT-05:00) Eastern Time (US & Canada)

3. Click view request history. A list of all requests submitted by this user is listed.

The history screen displays the following information:

- Type of request
- Date of request
- Service package requested
- Site code(s) requested (if applicable)
- Approval status
- Name of the deciding Administrator
- Date of decision

ome : My Profile :	My Organization	Search Administra	ation : Reports				Show side
De muset i Keter v Germ						Service Admin	- Covis
Request History for:	TRAINING ADMI	N					
The following table cont	ains all requests exclu	uding those still pending a d	ecision. Click on the	request type to vi	ew details of a reque	st.	
request history						4	
request type	request date	package	site codes	approved	evaluator	decision da	ite
Request for User Access	2003.12.15 EST	Covisint (required)		🗹 yes	JDOE	2004.01.05	ST
Request for User Access to a Service	2006.10.16 EDT	Covisint Time Tracker		🗹 yes	JDOE	2006.10.16	DT
Request for User Access to a Service	2007.01.04 EST	Content Management		🗹 yes	JDOE	2007.01.05	ST
Request for User	2007.01.04 EST	Covisint Web Connect		🗹 yes	JDOE	2007.01.05	ST
	2007.01.10 EST	Covisint Teamroom		Xno	Service Admin	2007.01.10	T

4. If you wish to view additional details for an item, click on that item name in the 'request type column.

From this screen, you are able to view additional details, such as the reason for rejection submitted by the deciding administrator.

Home 🗄 My Profile 🗄 My Orga	nization : <mark>Search</mark> : Administration : Reports :	📕 Show side nav					
	Service Admin	- Covisint					
	\checkmark The selected request has already been processed.						
historical details of Covisint	storical details of Covisint Teamroom request for: TRAINING ADMIN						
This request has already been rej	ected. The following tables contain information about the request, the decision, and the person who evaluated the requ	est.					
decision information							
evaluator name	Service Admin						
evaluator user ID	JDOE						
	rejected this package is not required for your position						
date issued	2007.01.10 EST						
request information							
requestor name	ADMIN, TRAINING						
requestor user ID	TRAININGADMINB						
request type	Request for User Access to a Service						
date requested	2007.01.10 EST						

Result
You have successfully viewed a request history for a user in your organization.

Inviting User to Register for a New User Account

1. Click **Invite Users** from the *Administration -> Invite* drop down menu. The invitation screen is displayed.

Covisint Connection and Administration	>Home →Portal →Help →Contact Us →Logout
Home : My Profile : My Organization : Sea	rch : Administration : Show side nav Pending requests - Covisint Invite Users Invite User for Povisint Connect
Please use the following form to invite users in you invite users	
*	= required fields
*Subject:	Invitation from Jane Doe to Register with Covisint
* Email Addresses:	Please enter the recipient's email addresses separated by a semi-colon (;)
	(this box is 80 characters wide)
* Message Body:	Greetings! Because of your job responsibilities, you have been identified as an individual who will need a <u>Covisint</u> user ID. As the Security Administrator for <u>Covisint</u> , I am responsible for managing our company's users and their access to <u>Covisint</u> services. Click on the <u>hyperlink</u> below to begin the <u>Covisint</u> registration process:
	https://register.stg.covisint.com/CommonReg?cmd=REGISTER_INVITED_USER

The *Subject line* and the *Message body* fields are populated by default. While these fields are editable, it is recommended that you do not modify the text as editing the actual invitation URL within the invitation text could break the link.

 In the Email Address open text field, key in the email address for each recipient you wish to invite, separated by a semi-colon (;) (For example, a list of users: <u>user1@mycompany.com</u>; <u>user2@bluecompany.com</u>; <u>user3@pinkcompany.com</u>).

⚠

The system does not validate the accuracy of the email addresses that you key in. If an email invitation cannot be delivered for any reason, the administrator will **not** be notified of this failure.

- 3. Click **Send Invitation**.
- Click **OK** to confirm. The email invitations are sent to the email addresses. You will receive email notification of each registration request. The <u>Pending User</u> <u>Requests</u> queue displays all users who have registered and are pending approval.

Result
You have successfully invited a user to register. You will receive an email notification once the user has successfully registered. At that time, you shall log in to issue a decision on the pending user requests.

Managing Pending New User Account Requests

me 🗄 My Profile 🗄 My Organiza		Iministration : Reports		Show side na
			sei nequests	curity Admin - Covisin
eview Users Pending Approva	al _	Invite O Roles and Services	n hization Requests	
new user(1)	user service		user site code(1)	user home location code(0)
The following users have requested a		Click each user name to view	v the request details and make	a decision.
The following users have requested a review users to approve or reject Include all divisions		Click each user name to viev	w the request details and make	a decision.
review users to approve or rejec		Click each user name to view	v the request details and make request	a decision. Division

1. Click **User Requests** from the *Administration -> Pending requests* drop down menu.

2. Click 1 to view the details of the request.

		s Requested to Il User Reques		ices are appropriate for th	iis user. Note that	you may reject	some or all of the servic	e requested, but s
l ote: If a ogin befor	applicat re the ch	ion is granted ange is reflect	to your organzation su ed on the screen. Serv	ch that a "non-approvable rices to which your Organi	" request become: zation does not su	s "approvable," bscribe will be a	you may need to close yo automatically rejected.	ur browser and re-
user info	ormatio	n						
		Full Name	Jane Doe			Job Title		
	Organia	zation Name	Covisint			User ID	123JANEDOE	
		Address 1	1 Campus Martius		E	mail Address	jane.doe@yahoo.com	
		Address 2			Wireless E	mail Address		
		Address 3			P	hone Number	313.555.1212	
		City/Region	Detroit		Mobile P	hone Number		
	Sta	te/Province	MI			Fax Number		
		Postal Code	48226			Time Zone	(GMT-05:00) Eastern Tim	e (US & Canada)
		Country	UNITED STATES		Prefer	red Language	English	
pprove	the second s	st user name Jane Doe		request reas		rejection rea	son*	-
	the second s	user name		request reas		rejection rea	son*	
approve ()	reject	user name Jane Doe				rejection rea	son*	
opprove o ervices	reject O	user name Jane Doe	tions			rejection rea	son*	
services	reject O reques Manage	user name Jane Doe ted			8	rejection rea		
services	reject O reques Manage	user name Jane Doe ted ment Applica	kage name		8		son*	
© services Content i approve	reject O reques Manage reject	user name Jane Doe ted ment Applica service pac	kage name		8	rejection rea mandatory :	son*	
services Content : approve	reject reques Manage reject Supplie	user name Jane Doe ted ment Applica service pacl Content Mana	kage name Igement		5	rejection rea mandatory :	son* for tems	
services Content i Spprove	reject reques Manage reject Supplie	user name Jane Doe ted ment Applica service pact Content Mana d Services	kage name Igement kage name		5	rejection rea mandatory : rejected in	son* for tems	
services Content i approve	reject reques Manage reject Supplie reject ©	user name Jane Doe ted ment Applica service pact Content Mana d Services service pact	kage name Igement kage name		9	rejection rea mandatory : rejected in	son* tems	

3. Perform one or more of the following:

If you wish to	Then
approve the new user request	Enable the Approve radio button for the request.

If you wish to	Then
reject the new user request	 a. Enable the Reject radio for the request. a. As required, key in the reason for the rejection in the open text field. (The text you enter in this box becomes part of this user's permanent record, and is viewable by all Security Administrators in your company). Note: If you reject a new user request, all service package requests for that user are automatically rejected.
approve the service requested by the new approved user (Note that new users and new service packages are listed together in the same tab)	Enable the Approve radio button for the service.
reject the new user's service package request	 a. Enable the Reject radio for the service package request. b. As required, key in the reason for the rejection in the open text field. (The text you enter in this box becomes part of this user's permanent record, and is viewable by all Security Administrators in your company).
approve site code requests	Enable the Approve radio button for the site code.
reject site code requests	 a. Enable the Reject radio for the site code request. a. As required, key in the reason for the rejection in the open text field. (The text you enter in this box becomes part of this user's permanent record, and is viewable by all Security Administrators in your company).
approve home location code requests	Enable the Approve radio button for the home location code.

If you wish to	Then
reject home location code requests	a. Enable the Reject radio for the home location code request.
	b. As required, key in the reason for the rejection in the open text field. (The text you enter in this box becomes part of this user's permanent record, and is viewable by all Security Administrators in your company).

Supplier Code/Location Code: The supplier code associated with a user's grant to the parent portal package (i.e. Ford Supplier Portal) is typically known as the user's location code. Note: Each portal owner may have a slightly different term that they use (i.e. home location code). The location code designates the user's primary office location. Some applications within the portal use the location code to determine what items the user can view in the application. Other applications refer to the specific supplier codes associated with the user's grant to that application to determine what items the user can view.

- 4. Click submit decision.
- 5. Click **OK** to confirm issuing a decision regarding the new user account request.

Result
You have successfully managed a new user's pending requests.

Service Authority Organization (SAO)

Service Authority Organization: The Covisint Connection and Administration (CCA) tool allows companies to create multiple administrative organizations for a single Legal Corporation. For example, a company's European offices may have a completely separate CCA organization from the North American offices' CCA organizations. Most Portal packages, such as the Ford and DaimlerChrysler Supplier Portals, require relationships between these organizations based on the Supplier Code. The Service Authority Organization is a designation of primary responsibility for all organizations with the same parent supplier code.

Service Authority Organization Responsibilities

- Approve Requests for the service submitted by related organizations
- Approve and Revoke Site Codes grants to related organizations
- Revoke access to the service from related organizations

For details on pending requests for organizations, refer to the section entitled "Who Approves an Organization Request?"

Changing the SAO Designation

In the case where multiple distinct CCA organizations have the same parent supplier code attached to a portal grant, the SAO designation can be switched between those related organizations. The organization that currently has the SAO designation must initiate the process.

1. Click **View my Organization Service Packages** from the My Organization drop down menu. The View Service Package Screen is displayed.

	-	Administration i Repo		el - One Stop Shop I	🔲 Show
ew service packages f	or:One Stop Shop Man	ufacturing (DEMO)	odgeekk wile		nanaractaning (i
view profile	view service packages	view hierarchy	view use	ers	administrator
edit organization prof	ile ≯view	request history	• view	pending requests	
The following is the list of ser	rvices currently granted to this ackage name. You may suspe			by category.To view the details screen.	
The following is the list of ser details, click on the service p		nd / remove a service from th	e organization from	l by category.To vieu the details screen.	_ = uses site o
The following is the list of ser details, click on the service p service package name				by category.To view the details screen.	_ = uses site o
The following is the list of ser details, click on the service p		nd / remove a service from th	e organization from	l by category.To vieu the details screen.) = uses site c d
The following is the list of ser details, click on the service p service package name Administration		nd 7 remove a service from th more info	e organization from status	l by category.To viei the details screen. date grante) = uses site c d

2. Click on the *name of the portal service package* for which you wish to change the SAO designation. The Details Screen for that service package is displayed.

Covisint Connection and Administration	►Home ►Portal ►Help ►Contact Us ►Logou	^
Home : My Profile : My Organization	: Search : Administration : Reports :	
One Stop Shop Portal details for:On	Squeeky Wheel - One Stop Shop Manufacturing (DEMO) Stop Shop Manufacturing (DEMO)	
[۱
The following shows all details about this service suspended.	vice package that is currently granted to the organization. The status of the package can be active or	
A suspended package is unavailable to all us	ers in the organization.	
To suspend an active package, click on the s	uspend button. A suspended package may then be permanently removed.To Permanently Remove a y Remove button. <i>Note that a permanent removal cannot be undone</i> .	
view organization profile	▹ view organization service package list	
service package status		
status	Active (suspend)	
service package information		
description	One Stop Shop Portal	
owner organization	One Stop Shop Manufacturing (DEMO)	
supplier code	G5N4W5	
service authority organization (SAO)	One Stop Shop Manufacturing (DEMO) request to change SAO	
other organizations with same authority designation		
site codes	view current site codes	
inactivity report		
description	view inactivity report	
services included within One Sto A Service Package may consist of one or ma	op Shop Portal ny services. The services included in this Service Package are listed below.	
	- -	~

3. Click request to change SAO.

.

- 4. Select the organization to receive the SAO designation. If there are no organizations listed, it means that no other CCA organization has the same parent supplier code for the portal package selected.
- 5. Review the change and click **submit**.

Result

You have successfully changed the SAO designation for a service package for your organization.

ovisint Connection and Ad	Iministration			→ Home → Porta	l →Help →Contact Us →Logou
lome : My Profile : M		n i Search i Admi	nistration :		Show side na
	View my Organi				- Covisint
rganization profile f		Ation Service Packages			
		ization Hierarchy			
view profile	View my Organi	zation Users	w hierarchy	view users	administrator
	View my Organi	ization Administrators			
All organization information organization, you may us	on is available fro e the option links	om this page, including th s below to perform availa	e names of the organization's Sec ble administrative tasks.	urity Administrators.If you are a	Security Administrator for this
organization status w	ithin covisint c	onnection and adminis	stration		
No. 2016	Status:	Active			
	status options				
last quarte	rly user audit	2005.06.30 performed	by jdoe		
last annual us	er grant audit	2006.06.20 performed by	EXCHNGOP1		
organization informat	tion				
	Name	Covisint			
	Address	1 Campus Martius , Detr	oit, MI 48226 UNITED STATES		
P	hone Number			URL http://w	ww.covisint.com
	Fax Number			DUNS Number 0	
administrator informa	ation				100
Name		User ID	Job Title	Phone N	umber
Jane Doe	1	jdoe1324		313.555.	1212
John Doe		jdoe4312		313.555.	1212

Viewing the Administrator's view of Organization Profile

Perform one or more of the following:

If you wish to	Then
View the current service packages to which your organization subscribes	 a. Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	b. Click view service packages tab. The View service packages screen is displayed. From this screen, you are able to view packages and sub packages to which your organization currently has access. To view details of any service package grant, simply click the package name.
view the current hierarchy of your organization within CCA	 a. Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	b. Click view hierarchy tab. This page reflects the Covisint user administration model, not necessarily the legal or physical structure of your organization. To view an organization, simply click on its name within the tree.

If you wish to	Then
view users within your organization	 a. Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	 b. Click view user tab. All users registered in the organization are displayed.
view users in a particular division of your organization	a. Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	b. Click view hierarchy tab.
	c. Click on the name of the division.
	 Click view user tab. All users registered in the selected division are displayed.
view all administrators in your organization	 Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	 b. Click administrator tab. All administrators in your organization are displayed.
view administrators in a particular division of your organization	a. Click View my Organization Profile from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization.
	b. Click view hierarchy tab.
	c. Click on the name of the division.
	d. Click administrator tab. All users registered in the selected division are displayed.
edit your	a. Click edit organization profile.
organization profile	b. Edit as desired.
	c. Click submit changes .

If you wish to	Then
View pending organization requests	Click view pending requests .

Result
You have successfully viewed organization details from an administrator
perspective.

Managing Your Organization Service Packages

As the Security Administrator, you are able to manage your organization's service packages.

Icons indicating the following functionality are noted next to each service package as appropriate:

- Packages already owned by your parent company (if applicable) are denoted by a check mark
- Packages that require additional information are indicated with a pencil icon
- B Packages that will cause the user to incur fees are denoted with a dollar sign
- Packages that require site codes are indicated with the barcode icon

Requesting a Service Package for Your Organization

Covisint Connection and Ac	Iministration			⊁Home ≯Portal ≯Help	o → Contact Us → Logout
Home : My Profile :	My Organization : Search : Administration	n i Reports i			📕 Show side nav
	View my Organization Profile			Service	Admin abston - Covisint
request service pack	View my Organization Service Packages	1			Steps: -①-
	View my Organization Hierarchy				
	View my Organization Users				
The following list contain	Request a Service Package for my Organization	nd other Covisint r	nembers. Please	indicate the service packages y	our organization
requires by clicking the t	View organization Administrators				
	(\$) = per user fe	es apply 🔽 = subs	scribed to by you	r parent company 🧷 = addition	al information needed
service packages					
Content Managemen	t Applications				
Management. To reque sub-package' link below	les of applications available for those approved to acc st a sub-package of Content Management, please sel			access granted	more info
MOPAR					
Mopar Supercedence N	arratv 3270			request	more info
Partner Portals					
Sub-packages are bund DaimlerChrysler Portal:	tal: Service for Chrysler Group les of applications available for those approved to acc Service for Chrysler Group. To request a sub-package Service for Chrysler Group, please select the 'request	e of		access granted	more info
🕑 request sub-pac	kage (application package)				
Sub-packages are bund DaimlerChrysler Portal: package of DaimlerChry	tal: Service for DaimlerChrysler Services Nort les of applications available for those approved to acc Service for DaimlerChrysler Services North America. To sler Portal: Service for DaimlerChrysler Services North st sub-package' link below.	cess o request a sub-		access granted	more info

Perform one or more of the following

If you wish to	The	en
Request a service package	1.	Click Request a Service Package for my Organization from the My Organization drop down menu. The Request Screen is displayed. A list of all service packages are displayed.
	2.	Click request .
	3.	Key in the reason for the request in the open text box.
	4.	Click continue . This request for service package is submitted to the approving administrator.
Request a sub-package of a service package (The package must be granted to the organization before the sub- package can be requested or granted).	1. 2.	Click Request a Service Package for my Organization from the My Organization drop down menu. The Request Screen is displayed. A list of all service packages are displayed. Click request sub package . This request for sub package is submitted to the approving administrator.

Result						
You have suce	You have successfully requested a package or sub-package for your					
organization.	organization. For details on pending requests for organizations, refer to					
the section entitled "Who Approves an Organization Request?"						

Who Approves an Organization Request?

Organization Approval Matrix							
If the Requestor is	And the Package Owner is	Then the Approver is the					
an SAO	a Portal Partner	Portal Partner Admin					
a top-level non-SAO	a Portal Partner	SAO Admin					
a Top-level Org	Covisint	Covisint Admin					
a Division	any	Division's Parent Company Admin					

Suspending a Service Package From Your Organization

⚠

Warning: Suspending a service package from your organization is not easily undone. Once you suspend your organization's access to a service package, it can only be reinstated by contacting Covisint. Once you suspend your organization's access to a service package, it can only be reinstated by requesting the package for your organization. This includes packages that were auto-granted to your organization. For details on pending requests for organizations, refer to the section entitled "Who Approves an Organization Request?" **You may prefer to suspend the service package from individual users in your organization.** By so doing, you remain in control of access to the service package, and can easily 'un-suspend' a user's access to a service package.

Security Administrators are able to suspend the Organization's access to any service for which they are assigned as Administrator. The locked state prevents all users in the organization from logging in to the suspended service. If users try to login, they receive an "unauthorized" message. Once a service package is suspended, it can only be reinstated by Covisint. You are not able to reactivate a suspended service package.

1. Click **View my Organization Service Packages** from the My Organization drop down menu. The View Service Package Screen is displayed.

inu namina maakawaa far				Service Adm	nin abston -
iew service packages for	view service packages	view hierarchy	view users	di di	ministrato
view prome	view service packages	view merarchy	VIEW USERS		minscraco
view request history	+ viev	w pending requests			
		inization. The service packages are or e from the organization from the deta		service package	e details, cli
				1	= uses site
service package name			more info	status	date gra
Administration					
Covisint (required)			more info	🗹 Active	2001.10.0
Secure File Exchange Admi	inistration (Covisint Owned)		more info	🕲 Suspended	2007.01.1
Content Management Appli	cations				
🛞 Content Management			more info	🖌 Active	2002.03.0
DaimlerChrysler Content M	anagement		more info	🗹 Active	2002.09.05
builderen yster concenter					
Quality					
	Planner		more info	🔕 Suspended	2006.11.0
Quality	Planner		more info more info	-	
Quality Conisist Advanced Quality	Planner			-	2006.11.0
Quality Conicies Advenced Quality Problem Solver	Planner			Active	

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2. Click on the *name of the service package* you wish to suspend. The Details Screen for that service package is displayed.

ovisint Connection and Administration		▶ Home) Portal	▶ Help	▶ Contact Us	▶ Logou
lome : My Profile : My Organization : S	earch : Administration : Reports :				📕 Sho	ow side na
Problem Solver details for:Covisint				Service A	ldmin abston ·	- Covisint
The following shows all details about this service (ackage that is currently granted to the organization. The st	atus of the pacl	kage can t	pe active	e or suspende	d.
A suspended package is unavailable to all users in	the organization.					
	nd button. A suspended package may then be permanently . Note that a permanent removal cannot be undone.	removed.To Pe	rmanently	Remov	e a suspendeo	d
view organization profile	view organization service package list					
service package status						
status	Active (suspend)					
	\cup					
service package information						
description	Problem Solver					
owner organization	Covisint					
services included within Problem S	blver					
A Service Package may consist of one or many se	ervices. The services included in this Service Package are lis	sted below.				

3. Click suspend.



Warning: Suspending a service package from your organization is not easily undone. Once you suspend your organization's access to a service package, it can only be reinstated by contacting Covisint. This includes packages that were autogranted to your organization. For details on pending requests for organizations, refer to the section entitled "Who Approves an Organization Request?" You may prefer to suspend the service package from individual users in your organization. By so doing, you remain in control of access to the service package, and can easily 'un-suspend' a user's access to a service package.

- 4. Key in the reason for suspension in the open text box.
- 5. Click **yes, proceed with suspension**. The suspension is logged in the history along with the name of the Administrator performing the task.

Result

You have successfully suspended a service package for your organization.

Permanently Removing a Suspended Service Package For Your Organization

Security Administrators are able to permanently remove a suspended service package for the Organization for any service to which they are assigned as Administrator. Once removed, the service package can no longer be reinstated by Covisint.



Once permanently removed, the service package is permanently removed from all users in the organization, and all divisions below. The service package cannot be reinstated. This includes packages that were auto-granted to your organization. For details on pending requests for organizations, refer to the section entitled "Who Approves an Organization Request?"

1. Click **View my Organization Service Packages** from the My Organization drop down menu. The View Service Package Screen is displayed.

ovisint Connection and Adminis	tration		► Home ► Po	ortal ⊁Help ≯I	Contact Us 🔸
lome : My Profile : My Or	ganization : Search : Ad	ministration : Reports :			📕 Show si
iew service packages for	Covisint			Service Adm	nin abston - Co
view profile	view service packages	view hierarchy	view users	ad	ministrator
				1 44	
view request history	+ viev	pending requests			
		nization. The service packages are e from the organization from the de			e details, click = uses site co
service package name			more info		date grante
Administration					
Covisint (required)			more info	🗹 Active	2001.10.07
Secure File Exchange Admi	nistration (Covisint Owned)		more info	🕲 Suspended	2007.01.11
Content Management Appl	ations				
🛨 Content Management			more info	🗹 Active	2002.03.04
DaimlerChrysler Content M	anagement		more info	🗹 Active	2002.09.05 E
Covisint Internal Application	ns				
CAS - Covisint Internal			more info	🗹 Active	2002.03.04
Covisint Time Tracker			more info	🗹 Active	2004.01.27
Covisint Web Connect			more info	🗹 Active	2003.05.19
+ GRID - Online Access			more info	Active	2003.10.10
Library Services - GSS			more info	🛇 Suspended	2004.07.15
Logistics Dashboard			more info	Active	
			more info	A Antina	
Mitsubishi Electric Supplier	Connection		more into	V ACUVE	2006.01.18 E

2. Click on the *name of the suspended service package* you wish to permanently remove. The Details Screen for that service package is displayed.

Covisint Connection and Administration		+Home →Portal →Help	Contact Us → Logout
Home : My Profile : My Organization : S	earch : Administration : Reports :		📕 Show side nav
Library Services - GSS details for:Covis	int	Security /	Admin Abston - Covisint
A suspended package is unavailable to all users in To suspend an active package, click on the suspe	backage that is currently granted to the organization. The status o the organization. nd button. A suspended package may then be permanently remo . Note that a permanent removal cannot be undone.		
view organization profile	view organization service package list		
service package status			
status	Suspended		
	permanently remove organization's grant for service package	1	
service package information			
description	Library Services - GSS		
owner organization	Covisint		

- 3. Click permanently remove organization's grant for service package.
- 4. Key in the reason for removing the service package in the open text box.
- 5. Click yes, proceed with removing. The permanent removal is logged in the history along with the name of the Administrator performing the task.

 Result

 You have successfully removed a suspended service package for your organization.

Managing Service Packages for Divisions of Your Organization

As the Security Administrator, you are able to manage service packages for divisions in your organization. You are able to grant, suspend, and remove service packages from divisions in your organization.

Granting a Service Package to a Division in your Organization

Security Administrators are able to grant some Service Packages as well as Sub-Packages to divisions in their organization. The division must be at a lower tier in the hierarchy, and the parent organization must have access to the service package. (Subpackages are designed such that the parent package must be granted before the subpackages become available).



The division must be at a lower tier in the hierarchy, and the parent organization must have access to the service package.



Service Package – a grantable container that contains at least one application or tool accessed via Covisint portal. Some Service Packages contain sub-packages.



Sub-package – a grantable container that contains at least one sub-service application. The sub-package requires that the parent package be granted first.

Complete the following steps to grant service packages to divisions in your organization.



You are only able to grant service package(s) to which your organization has access.



1. Click **View my Organization Hierarchy** from the My Organization drop down menu. The View Hierarchy screen is displayed.

	v for:Covisint	anization : Search : Admin	nstration : Reports :		Security Admin Abston - Co
view pr		view service packages	view hierarchy	view users	administrator
→ edit organ	ization profile	→ view red	juest history	+ view pending re	quests
physical structu		archy of your organization within C zation. To view or edit an organiza 1.			
* note: To requ you.	est changes to th	e administrative hierarchy, send ar	n email to hierarchy@covisint.c	om indicating the changes reques	ted and the best way to con
		r division, the administrator for the 'CommonReg?cmd=REGISTER.	new organization must perform	m a division registration request a	t
Organization Na			ddress		
🔄 Covisint /	🕸 🖉 📈	1	Campus Martius, Detroit MI 483	226	
EDS	×.	21	6533 Evergreen, Southfield MI 4	8086	
	•• 😹 😤 .	2:	333, detroit mi 87878		
SAO	Test 🔏 対	h	ello, hello mi 48150		
🗉 🔄 QAM	laster 🐰 😤	25	5800 Northwestern Hwy, Central	America Provinz 48304	
	QA VPW 🎩 対	1:	23 Tibbs Drive, Novhere Michiga	n 45862	
	QASTENS 🌆 🕺	1:	23, Main street, Southfield MI 4	8304	
	QA Script 😹 쑭	1:	23 anywhere, nowere MI 45612		
	QAECDec22 😹	2	500, Northwestern Hwy, Southfie	ld MI 48304	
	QAStgIE5.0 🕵	* 1:	23, Main Street, Southfield MI 4	8304	
	QAStgPortal 騽	2	5800,Northwestern Hwy, Southfie	eld MI 48134	
	QA Master II 🧏	🖌 📩 te	st, test test 56565		
	check3check4 🕈	🐉 📩 te	st, test test 55555		
	check5check6 🕈	🧞 📩 ан	aaaaaaah, yes Michigan 45678		
	English Aff001	2:	5800 Northwestern Hwy, Finley C	OH 34588	
Ξ 😑	JAffTestOct82	2 📩 📩 29	5800, Northwestern Hwy, Southfi	ield MI 48204	
	📄 October 🥈	2:	13432, New City MI 48304		
	QA AffOcti	14 🗟 📩 2!	5,800 NorthWestern Hwy, SouthI	Field MI 48304	
	QA Affiliate	eNS 🔊 🚖 21	5800, North Western Hwy, South	field MI 48304	
	QA Affiliate	e 05 🕵 👷 🛛 21	5800, Civic Center Dr, Southfield	3 MI 48304	
	QA Affilate	NS4.5 🗟 📩 2	5800, Northwestern Hwy, Southfi	ield MI 48304	
	QA Procurement	2	5800 Northwestern, Southfield M	11 48076	
	A Materials Co.	🛐 📩 🛛 🗈	23 Main St., Toledo OH 12345		
Ξ 🔂	QA Security Co.	🕵 📩 📰 📰	11 Anystreet, Anywhere UT 2587	74	
	QA Security	y Group 👧 📩 29	5800 Northwestern Highway, Sou	uthfield MI 48034	
	AA Materials Co.	1:	24 Main St., Toledo OH 12345		
	BB Materials Co.	🕱 🚖 🛛 13	25 Main St., Toledo OH 12345		

2. Click on the *name of the division* for which you are searching. The Division Profile is displayed.

ome 🗄 My Profile 🗄 My Organizat	ion : Search : Adr	ninistration : Reports :		📕 Show side na					
organization profile for BB Mate	ganization profile for:BB Materials Co.								
-	v service packages	view hierarchy	view users	administrator					
view prome view	Alex brottle Alex SetAlce backades Alex illetatoria Alex asets animilitatori								
 edit organization profile view pending requests 									
	All organization information is available from this page, including the names of the organization's Security Administrators. If you are a Security Administrator for this organization, you may use the option links below to perform available administrative tasks.								
	Active (view detail								
	<u> </u>								
status option									
last quarterly user aud									
last annual user grant aud	t No previous annual	audit							
organization information	_								
Nam	BB Materials Co.								
Addres	s 125 Main St. , Toledo, C	DH 12345 UNITED STATES							
Phone Numbe	r 555-555-1212		URL						
Fax Numbe	r		DUNS Number						
administrator information									
Name	User ID	Job Title	Phone M	Number					
MR QA Admin3 QA Admin3	QADMIN3		555-555	-1212					

3. Click **view service packages** tab. All list of all service packages granted to the division is displayed.

					Service Admin abston - Cov
w service packages for:	BB Materials Co.				
view profile	view service packages	view hierarchy	vie	w users	administrator
→ add service package	→ view r	equest history	÷.,	view pending requ	ests
		nization. The cervice nackage	s are organized by i	category To view set	rvice package details, click
	may suspend / remove a service				nino paskago actano, enok
the service package name. You				date gran	🚛 = uses site coo
the service package name. You service package name		from the organization from t	he details screen.		d = uses site cod
the service package name. You service package name Administration		from the organization from t	he details screen.		d = uses site coo
the service package name. You service package name Administration Covisint (required)		from the organization from t more info	he details screen.	date gran	<pre>d = uses site cod ted</pre>
the service package name. You service package name Administration Covisint (required)		from the organization from t more info	he details screen.	date gran	<pre></pre>
the service package name. You service package name Administration Covisint (required) Covisint Supplied Services		from the organization from t more info more info	status	date gran 2001.10.07	<pre></pre>

4. Click **add service package**. A list of all Services Packages for which you are the Security Administrator is listed.



ome : My Profile : My Organization : <mark>Search</mark> : Administration : Report	s i		📕 Show side nav				
		Service .	Admin abston - Covisint				
dd service package: BB Materials Co.			Steps: -①-				
The service packages available to grant to BB Materials Co. are listed below. These packages are organized by category.							
If you wish to grant a service package, simply click the 'add' button next to the appropriate the 'more info' link.	e package. For more information at	oout a service packa	ge, simply click on				
Partner Portals Users may also be granted access to Covisint's Partner Supplier Portals and their sub-pack portals, you may assign sub-packages by clicking on the 'sub-packages' button under the '		ization subscribes to	one of the partner				
	\$ = per user fees a	apply 🔏 = addition	al information needed				
service packages							
Content Management Applications							
Content Management		add	more info				
Quality							
Problem Solver	\$	add	more info				
		7					

- 5. Click add.
- 6. Click **continue**.

Result
You have successfully granted a service package to a division in your organization.
Suspending a Service Package from a Division of Your Organization

Complete the following steps to suspend a service package from a division. This will prevent all users in the selected division from accessing the applications contained within the package.



The division must be at a lower tier in the hierarchy than your own organization.

1. Click **Search for Divisions in my Organization's Hierarchy** from the Search drop down menu. The Search Screen is displayed.

Covisint Connection and Administration		Home	▶ Portal	▶ Help	▶ Contact Us	▶ Logout
Home : My Profile : My Organization : S	earch : Administration : Reports : Search for Users in my Organization			ocuritu (I Shov	v side nav
organization search	Search for Divisions in my Organization's Hierarchy			econty /	Admin Abston	COVISING
organization nam	e					
keyword search for organization Enter the organization name, or any portion of the	e organization name, and click Search.					
keyword search						
*	= required fields					
*organization name:	contains 💌 search tips					
filter options:	filter options (EXCLUDE these from my results): Active Pending Permanently Removed Rejected		🔲 Susp	ended		
results per page:	50 💌					
	search					

- 2. Key in search criteria and set filters as desired.
- 3. Click Search. The Search Results screen is displayed.

visint Conn	nection an	d Administration		→Home →Portal →Help →Contact Us →Logout
me : M	y Profile	: My Organization : Search) : Administration : Reports :	Show side nav
				Security Admin Abston - Covisint
rganizati	on sear	ch result(s):		
		organization name		
The result	esults	earch appear below. Click on an or	ganization name to view details. Scroll down to enter new	search criteria or click help for Search Tips. Found: 102 results
Status	View tierarchy	Organization Name	Address	Found, 162 results
\checkmark		A Materials Co.	123 Main St., Toledo, OH 12345	
\checkmark		AA Materials Co.	124 Main St., Toledo, OH 12345	
\checkmark		AAA Materials Co.	150 Main St., Toledo, OH 12345	
\checkmark		BB Materials Co.	125 Main St., Toledo, OH 12345	
\checkmark		BBB Materials Co.	151 Main St., Toledo, OH 12345	
\checkmark		CC Materials Co.	126 Main St., Toledo, OH 12345	

4. Click on the *name of the division* for which you are searching. The Division Profile is displayed.

5. Click view service packages tab.

			>Home >Po	
ne 🗄 My Profile 🗄 My Organizati	ion : Search : Administrat	tion : Reports :		📕 Show sid
				Security Admin Abston - Cov
w service packages for:BB Ma	aterials Co.			
view profile view	v service packages	view hierarchy	view users	administrator
→ edit organization profile → view pending requests	▶ add service	package	view request his	story
view pending requests				
The following is the list of services curre service package name. You may suspen				vice package details, click on t
The following is the list of services curre		ganization from the details		🧳 = uses site cod
The following is the list of services curre service package name. You may suspen		ganization from the details	screen.	🧳 = uses site cod
The following is the list of services curre service package name. You may suspen service package name		ganization from the details more info st	screen.	A site cod anted
The following is the list of services curre service package name. You may suspen service package name Administration		ganization from the details more info st	atus date gr	A site cod anted

6. Click on the name of the service package you wish to suspend.

Security Admin Abston - Covisint
Security Admin Abston - Covisint
ige can be active or suspended. nanently Remove a suspended

- 7. Click suspend.
- 8. Key in the *reason for suspension* in the open text box.
- 9. Click **yes**, **proceed with suspension**. The suspension is logged in the history along with the name of the Administrator performing the task.

Result

You have successfully suspended a service package for a division's your organization.

Permanently Removing a Suspended Service Package from a Division of Your Organization

Security Administrators are able to permanently remove a suspended service package from a division in the Organization.



Once removed, the service package can no longer be reinstated by the Administrator.

Complete the following steps to permanently remove a service package from a division.

1. Click **Search for Divisions in my Organization's Hierarchy** from the Search drop down menu. The Search Screen is displayed.

Covisint Connection and Administration		Home Portal Help Contact Us Logout
Home : My Profile : My Organization : S organization search	earch : Administration : Reports : Search for Users in my Organization Search for Divisions in my Organization's Hierarchy	E Show side nav Security Admin Abston - Covisint
organization name	e	
keyword search for organization Enter the organization name, or any portion of the keyword search	organization name, and click Search.	
*	= required fields	
*organization name:	contains 💌 search tips	
filter options:	filter options (EXCLUDE these from my results): Active Pending Permanently Removed Rejected	Suspended
results per page:	50 💌	
	search	

- 2. Key in search criteria and set filters as desired.
- 3. Click **Search**. The Search Results screen is displayed.

Covisint Cor	nection an	d Administration		► Home → P	ortal →Help	▶ Contact Us → Logo	out
Home i M	1y Profile	: My Organization : Searc	h : Administration : Reports :			📕 Show side r	nav
		1 117.5			Security /	Admin Abston - Covisir	nt
organiza	tion sear	ch result(s):					
		organization name					
The resu search		rch result(s): earch appear below. Click on an (organization name to view details. Scroll down to enter ne	ew search criteria o	r click help f	or Search Tips. Found: 102 result	te l
Status	View Hierarchy	Organization Name	Address			10010. 102 10300	.,
		A Materials Co.	123 Main St., Toledo, OH 12345				
1		AA Materials Co.	124 Main St., Toledo, OH 12345				
		AAA Materials Co.	150 Main St., Toledo, OH 12345				
		BB Materials Co.	125 Main St., Toledo, OH 12345				
		BBB Materials Co.	151 Main St., Toledo, OH 12345				
1		CC Materials Co.	126 Main St., Toledo, OH 12345				

- 4. Click on the *name of the division* for which you are searching. The Division Profile is displayed.
- 5. Click view service packages tab.

	anization : Search : Admi	nistration : Reports :			Show side
w service packages for:	BB Materials Co				Security Admin Abston - Covi
view profile	view service packages	view hierarchy	view	users	administrator
 edit organization profile view pending requests 	⊦ add se	ervice package	+ vi	iew request histo	ry
 view pending requests The following is the list of service 	 add se as currently granted to this organiz suspend / remove a service from 	ation. The service packages	are organized by categ		
• view pending requests	es currently granted to this organiz	ation. The service packages	are organized by categ		e package details, click on ti d = uses site code
 view pending requests The following is the list of service ervice package name. You may 	es currently granted to this organiz	ation. The service packages the organization from the de	are organized by categ tails screen.	jory.To view servic	e package details, click on ti d = uses site code

6. Click on the *name of the suspended service package* you wish to permanently remove. The Details Screen for that service package is displayed.



You are only able to permanently remove suspended service packages for which you are the Administrator.

The following shows all details about this servi	ce package that is currently granted to the organization. The status of the package can be active or suspended.
A suspended package is unavailable to all user	s in the organization.
	pend button. A suspended package may then be permanently removed.To Permanently Remove a suspended tton. Note that a permanent removal cannot be undone.
view organization profile	view organization service package list
service package status	
stat	us 🛇 Suspended
	permanently remove organization's grant for service package
service package information	
descripti	Ibrary Services - GSS
owner organizati	on Covisint

- 7. Click permanently remove organization's grant for service package.
- 8. Key in the reason for removing the service package in the open text box.
- 9. Click **yes**, **proceed with removing**. The permanent removal reason is logged in the history along with the name of the Administrator performing the task.

Result

You have successfully removed a suspended service package for a division in your organization.

Managing a Division's Request for Service Package(s)

i

Complete the following steps to manage a division's request for service package(s).

Note: All requests have a 30-day expiration period. If the request is not acted upon in 30 days, the request will be auto-rejected and an explanatory email will be sent back to the user. Requests that are close to expiring automatically trigger a reminder email to the approving administrator(s) five days before the request expires. These rules apply to all pending requests.

sint Con	nection an	d Adminis	tration		+Home →Portal →Help →ContactUs →Logo
ne i M	ly Profile	i My Or		nistration : Reports :	📲 Show side n
janizat	tion sear	ch resul		Organizzation Reque	ervice Admin abston - Covisin
		0	rganization name		
	ation sear		All Charmen and the second management of the second	name to view details. Scroll down to enter n	new search criteria or click help for Search Tips.
search	results				
You sear	rched for:				Found: 102 result
Status	View Hierarchy		ation Name	Address	
1	4	A Materi	als Co.	123 Main St., Toledo, OH 12345	
1		AA Mate	rials Co.	124 Main St., Toledo, OH 12345	
1	2	AAA Mat	erials Co.	150 Main St., Toledo, OH 12345	
1	-	BB Mater	rials Co.	125 Main St., Toledo, OH 12345	
1	-	BBB Mate	erials Co.	151 Main St., Toledo, OH 12345	
		CC Mater	rials Co.	126 Main St., Toledo, OH 12345	
•	4	CCC Mat	erials Co.	152 Main St., Toledo, OH 12345	
service	package	request			
appro	ove	reject	service package name	request reason	rejection reason*
0)	0	Covisint Teamroom	training	
				submit decision cancel	
					text entered in the <i>reject</i> I becomes part of this
				divis	sion's permanent record, is viewable by all Security
				Adm	ninistrators in your company.

Perform one or more of the following:

If you wish to	Then	h
approve the division's access request to a service package	1.	From the Administration -> Pending Requests menu, click Organization Requests . The Review Pending Approval screen is displayed.
	2.	Click next to the division name for whom you wish to review the request. The Details screen is displayed.
	3.	Enable the approve radio button next to the selected service package.
	4.	Click submit decision.
	5.	Click OK to confirm.
reject the division's access request to a service package	1.	From the Administration -> Pending Requests menu, click Organization Requests . The Review Pending Approval screen is displayed.
	2.	Click next to the division name for whom you wish to review the request. The Details screen is displayed.
	3.	Enable the reject radio button next to the selected service package.
	4.	Key in the reason for the rejection in the open text box. The text you enter in this box becomes part of this division's permanent record, and is viewable by all Security Administrators in your company.
	5.	Click submit decision.
	6.	Click OK to confirm.



Reports Defined

Reports allow a Security Administrator to view CCA real-time reports, customized for their roles. Within the reports options Administrators can view:

- * User Summary Report
- * User Service Summary Report
- * Service Summary Report
- * Security Administrator Reports
- * Quarterly and Annual User Audits

Each of these report types are defined in the following section.

User Summary

The User Summary report allows you to gain at-a-glance information regarding the number of users in your organization and the corresponding status. The report will display the number of pending, rejected, active, suspended and removed users.

User Service Summary

The User Service Summary report allows you to gather information about the numbers and identities of users who have been granted various service packages. You can limit your search to your own organization, or you can broaden it to include all users above or below your organization in your company's hierarchy. You can select a service package to narrow your results to all users with a specific service package or you can search for all users with all service packages. The report displays the User ID, Last Name, First Name, Email Address and Company/Division name of all users who meet the report criteria.

Service Summary

The Service Summary report allows you to gather information about the numbers and identities of users who have been granted various service packages.

Security Administrator

The Security Administrator reports offer three outcomes, including a user report, a service package grant report, and a user portal access by site code report. These reports allow you to gather information about the numbers and identities of users who have been granted various service packages.

Quarterly User Audits

A quarterly audit reminder will be emailed to all Security Administrators reminding them to perform the necessary audit activities. You can view your audit history on the Quarterly User Grant Audit page. The audit history records the date, the type of audit, and the auditor's ID for past audits.

Annual User Audits

An annual User Grant audit reminder will be emailed to all Security Administrators reminding them to perform the User Grant audit. You can view your audit history on the Annual User Grant Audit page. The audit history records the date, the type of audit, and the auditor's ID for past audits.

Generating Reports

Generating a User Summary Report

The User Summary report allows you to gain at-a-glance information regarding the number of users in your organization and their corresponding status. The report will display the number of pending, rejected, active, suspended and removed users.

Complete the following steps to generate a User Summary report.

1. Click **User Summary** from the Reports drop down menu. The User Summary screen is displayed as an html report for your organization.

Home 🗄 My Profile 🗄 My Or	ganization : Search : A				📕 Show sid
			er Summary	S	ervice Admin abston - Cov
User Summary			irvice Summary		
		Se	curity Administrator Re	ports	
2007.01.17 11:41:59 EST					
2007.01.17 11:41:59 EST Organization Name	# Pending Users	# Rejected Users	# Active Users	# Suspended Users	# Removed Users
	# Pending Users 0	# Rejected Users 58	# Active Users 677	# Suspended Users 76	# Removed Users 141
Organization Name	-	-			
Organization Name Covisint	-	-			
Organization Name Covisint Covisint Europe	-	-	677 67		

- 2. View the number of users by status type. For example, in the QA Master organization, you see that there are 0 pending users, 4 rejected users, 32 active users, 2 suspended users, and 1 removed user.
- 3. If desired, click on the *name of a division* in the organization by clicking on the division name. (This example users QA Master). The profile screen is displayed in a separate window.

ttps://register.stg.covisint.com -	Mozilla Firefox	
w organization profile		
organization information		
name:	QA Master	
Address 1:	25800 Northwestern Hwy	
Address 2:		
Address 3:		
City/Region:	Central America	
State/Province:	Provinz	
Postal Code:	48304	
Country:	BZ	
Phone Number:	248-827-6092	
Fax Number:		
URL:		
DUNS Number:		
	close	

a. Click **close** in the pop-up window when you are done viewing details.

4. If you wish to view this report as a .csv file, click show as .csv file in the upper left corner of the screen. An open file dialog box is displayed.

Opening userSumme	ary.csv	×
You have chosen to	open	
📷 userSummary.	.CSV	
which is a: Mic	rosoft Office Excel Comma Separated Value	
from: https://i	register.stg.covisint.com	
What should Firefo	ox do with this file?	7
📀 Open with	Microsoft Office Excel (default)	
🚫 Save to Di <u>s</u> l	*	
📃 Do this <u>a</u> uto	omatically for files like this from now on.	
	0-5	
	OK Cancel	

- a. Identify if you wish to open the file or save the file to disk by clicking the appropriate radio button.
- b. Click **OK**.

Result

You have successfully generated a user summary report.

Generating a User Service Summary Report

The User Service Summary report allows you to gather information about the numbers and identities of users who have been granted various service packages. In this report, you are able to specify the service package, as well as the level in the organizational hierarchy you wish to include.

Complete the following steps to generate a User Service Summary Report.

visint Connection and Administration	>Home →Portal →Help →Contact Us →Logou	ut
me : My Profile : My Organization : Search : Administratio	on i Reports i 📕 📕 Show side na	av
eports	Service Admin abston - Covisint	t
Report options		٦
Use the reports options to view CCA real-time reports, customized for your	role.	
 User summary This report alternation of the months of active suspended, pending, rejected and revoked users in each organization in your hierarchy tree. 		
 User, service summary Thisd¹⁰ bort allows you to view the number of active users for some service parkage with the service parkage with the service service	y	
 Service summary This report allows you to view the number of users who have been granted access to each service subscribed to by your organization. report is structured to include data from each organization in your company's hierarchy tree. 		
 Security administrator reports These reports will help you manage User IDs and the permissions granted to all users in your immediate organization or below. The report can be sorted by last name or by User ID. After running the report, you will have the option to download it into Exect. 		
ne : My Profile : My Organization : Search : Administr		
er Service Package Summary	Service Admin abston	1 - 0
Report Criteria		
	 my immediate organization only include all organizations below include all organizations above and below 	
select a service package	» Covisint Content Management	

Perform one or more of the following:

If you wish to	Then
view only users in your immediate organization,	 Click Reports. The Report Options screen is displayed.
	 Click User Service Summary. The User Service Package Summary screen is displayed.
	Enable the radio button next to 'include all organizations below'.
	 Select the service package for which you wish to view users from the dropdown

If you wish to	Then	
		menu.
	5	. Click submit . The screen refreshes and results are displayed.
view only users in organizations 'below' yours in the hierarchy,	1.	Click Reports . The Report Options screen is displayed.
	2.	Click User Service Summary . The User Service Package Summary screen is displayed.
	3.	Enable the radio button next to 'include all organizations below'.
	4.	Select the service package for which you wish to view users from the dropdown menu.
	5.	Click submit . The screen refreshes and results are displayed.
view only users in organizations 'above and below' yours in the	1.	Click Reports . The Report Options screen is displayed.
hierarchy,	2.	Click User Service Summary. The User Service Package Summary screen is displayed.
	3.	Enable the radio button next to 'include all organizations above and below'.
	4.	Select the service package for which you wish to view users from the dropdown menu.
	5.	Click submit . The screen refreshes and results are displayed.

ne 🗄 My Profil	e 🗄 My Organizati	on : Search : Admini	stration : Reports :	📕 Show side n
er Service Pa	ckage Summary			Service Admin abston - Covisin
Report Criteria				
	inc	ude organization options	my immediate organization only include all organizations below include all organizations above and below	
		select a service package	 Covisint Content Management 	
		initiate report	submit	
	ered in iate organization only Covisint Content Mana	agement		
2007.01.17 11:	47:46 EST			
User ID	Last Name	First Name	Email Address	Company/Division Name
EXCHNGOP	EXCHNGOP	EXCHNGOP	exchop@covisint.com	Covisint
	Doe	Jane	jane.doe@covisint.com	Covisint

Result

You have successfully generated a user service summary report.

Generating a Service Summary Report

The Service Summary report allows you to gather information about the numbers and identities of users who have been granted various service packages.

Complete the following steps to generate a Service Summary Report.

1. Click **Service Summary** from the Reports drop down menu. The Service Summary screen is displayed.

Home 🗄 My Profile	. Hy organize	icioni : seu			. Reports	•				Show sid	
ervice Summary									Service Admii	n abston - Cov	isint
ervice Summary											
show as a .csv file											
2007.01.17 11:48:15	5 EST										
	Content Management	Covisint Content Management	Covisint Teamroom	Delphi Content Management	FSP Content Management	JCI Content Management	Lear Content Management	Metaldyne Content Management	Mitsubishi Content Management	OSS Content Management	Proble Solver
Package ID	678	679	732	675	680	728	696	720	715	718	655
A Materials Co.	0	0	0	0	0	0	0	0	0	0	10
AA Materials Co.	0	0	0	0	0	0	0	0	0	0	0
AAA Materials Co.	0	0	0	0	0	0	0	0	0	0	0
BB Materials Co.	0	0	0	0	0	0	0	0	0	0	0
BBB Materials Co.	0	0	0	0	0	0	0	0	0	0	0
CC Materials Co.	0	0	0	0	0	0	0	0	0	0	0
CCC Materials Co.	0	0	0	0	0	0	0	0	0	0	0
Chin_Connect 1	0	0	0	0	0	0	0	0	0	0	
Covisint	41	10	31	5	5	1	5	4	8	4	68
Covisint - Commerce One	0	U	U	0	•	÷		U	U	0	5
Covisint - Percepta	0	0	0	0	0	0	0	0	0	0	3
Covisint Asia	0	0	0	0	0	0	0	0	0	0	0
Covisint Europe	0	0	0	0	0	0	0	0	0	0	0
Covisint II	0	0	0	0	0	0	0	0	0	0	0

- View the number of users by service package type. For example, in the Covisint organization, you see that there are 41 users of Content Management, 10 users of Covisint Content management, 31 users of Covisint Teamroom, etc.
- 3. If desired, click on the *number* in the column of the Service Package to view additional details. (This example users the number "10" in the Covisint Content Management column). The Details Summary screen is displayed in a separate window.

ne i My Profil	e i My Organizati	ion : Search : Adminis	stration : Reports :	📕 Show side na
ar Sarviaa Ba	akada Summany			Service Admin abston - Covisint
el Selvice Fa	ckage Summary			
Report Criteria				
	inc	lude organization options	 The module of the module of th	
		select a service package	» Covisint Content Management 🛛 👻	
		initiate report	submit	
	ered in diate organization only Covisint Content Man			
2007.01.17 11:	:47:46 EST			
User ID	Last Name	First Name	Email Address	Company/Division Name
EXCHNGOP	EXCHNGOP	EXCHNGOP:	exchop@covisint.com	Covisint
jdoe1234	Doe	Jane	jane.doe@covisint.com	Covisint

From this view, you are able to view all users in your immediate organization that are able to access this service package. (This is essentially the same output as the user service package grant report)

- a. If you wish to filter the results to view only users in organizations 'below' yours in the hierarchy, enable the radio button next to 'include all organizations below'.
- b. If you wish to filter the results to view all organizations above and below yours in the hierarchy, enable the radio button next to 'include all organizations above and below'.
- c. Optionally, you may select a different service package from the dropdown menu.
- d. Click **submit**. The screen refreshes and results are displayed.

Result	
You have successfully generated a service summary report.	

Security Administrator Reports

Generating a User Report

The User Report will help you manage all users in your immediate organization or below. The report can be sorted by last name or by User ID, and displays to you the user's SSO ID, first and last name, email address, phone number, organization name, as well as account status (active, suspended, deleted, etc.).

Complete the following steps to generate a User report.

- 1. Click Security Administrator Reports from the Reports drop down menu.
- 2. Click User Reports. The User Reports screen is displayed.

Home 🗄 My Profile 🗄 My Organization 🗄 Sear	ch 🗄 Administration	: Reports :	📕 Show side nav
			Security Admin Abston - Covisint
security administrator reports			
user report	user servi	ce package grants	user portal access by site code
This report will help you manage all users in your imn you will have the option to download it into Excel.	nediate organization or b	elow. The report can be sorted b	y last name or by User ID. After running the report,
Select your criteria and click 'submit' to generate the	report.		
Report Criteria			
include	organization options	 ● my immediate organization of ○ include all organizations belo 	
	sort by	⊙ user id ○ last name	
	results	 Show as HTML Show as a .csv file 	
	initiate report	submit	
			2007 © Compuware Corporation. All Rights Reserved.

- 3. Configure the filters for the report enabling the appropriate radio button for each required field, including:
 - Organization options (determines where in the hierarchy you wish to obtain information, for your immediate organization only, or all organizations below yours)
 - b. Sort by (determines how you want the report sorted, by user last name, or user id)
 - c. Results (determines how you wish to view the generated report)
- 4. Click **Submit**.

Result

You have successfully generated a user report.

Generating a User Service Package Grant Report

This report will help you manage the service packages granted to the users in your immediate organization or below. By generating this report, you will be able to view all users who have a grant to a selected service package. After running the report, you will have the option to download the report into Excel format.

Complete the following steps to generate a report.

- 1. Click **Security Administrator Reports** from the Reports drop down menu.
- 2. Click **user service package grants**. The User Service Package Grants Reports screen is displayed.

Home 🗄 My Profile 🗄 My Organiz	ation : Sear	ch : Administration : Reports :	🔳 Show side nav
			Security Admin Abston - Covisint
security administrator reports			
user report		user service package grants	user portal access by site code
		s granted to the users in your immediate organization of After running the report, you will have the option to do	
Select your criteria and click 'submit'	to generate the	report.	
Report Criteria			
include organization options		te organization only rganizations below	
*select a service package	Covisint Team	room	~
results	 Show as HTM Show as a .c 		
initiate report	submit		

- 3. Configure the filters for the report by selected an option for each required field, including:
 - Organization options (determines where in the hierarchy you wish to obtain information, for your immediate organization only, or all organizations below yours)
 - b. Select a service package (from the drop down list, click the service package for which you wish this report to generate)
 - c. Results (determines how you wish to view the generated report)
- 4. Click **Submit**.

Result

You have successfully generated a user service package grant report.

Generating a User Portal Access by Site Code Report

This report will help you manage all users in your immediate organization or below, for a given service package and site code combination. The report can be sorted by last name or by User ID. After running the report, you will have the option to download it into Excel.

Complete the following steps to generate a report.

- 1. Click Security Administrator Reports from the Reports drop down menu.
- 2. Click **user portal access by site code**. The Report screen is displayed.

Ho	me 🗄 My Profile 🗄 My Organiz	ation : Searc	∶h i Ao	dministration i	Reports :		📕 Show side nav
	ecurity administrator reports						Security Admin Abston - Covisint
50	curry administrator reports						
	user report	Ύ		user service	package grants	ſ	user portal access by site code
	This report will help you manage all u you will have the option to download		ediate or	rganization or belo	ow. The report can be sorted	by last n	name or by User ID. After running the report,
	Select your criteria and click 'submit'	to generate the r	eport.				
	Report Criteria						
	*select a service package						~
	*site code	•]			
	include organization options	⊙ my immediat ○include all or	-				
	sort by	◯userid ⊙last name					
	results	 Show as HTM Show as a .cs 					
	initiate report	submit					

- 3. Configure the filters for the report by selected an option for each required field, including:
 - Organization options (determines where in the hierarchy you wish to obtain information, for your immediate organization only, or all organizations below yours)
 - ii. Select a service package (from the drop down list, click the service package for which you wish this report to generate)
 - iii. Results (determines how you wish to view the generated report)
- 4. Click **Submit**.

Result

You have successfully generated a user portal access by site code report.

Performing Quarterly User Audits

Some of Covisint's portal partners require Security Administrators to perform a periodic audit of their users. A quarterly audit reminder will be emailed to all Security Administrators reminding them to perform the necessary audit activities. You can view your audit history on the Quarterly User Grant Audit page. The audit history records the date, the type of audit, and the auditor's ID for past audits.

You can perform the audit at any time using the Audit User functionality in CCA by completing the following steps:

	Pending requests		Securit	ty Admin Abston - Covisin
visint Connection and Administration fo		•		
	Roles and Service			
COMMON ADMINISTRATOR ACTIONS	Audits	Annual Users Au		
Quick access to the most common admin tasks	in CCA.	Quarterly Users /	Audit	
Organization	Reports		Audits	Last
View my Organization Service Packages	Security Administra	ator Reports	Quarterly User Audit	2005.06.30
View my Organization Users	User Summary		Annual User Audit	2006.06.20
Request a Service Package for my	User Service Summ	iary		
^o Organization		ary		
	• User service summ	My Organization		
Organization PENDING REQUESTS: 7 total			5	_
Organization PENDING REQUESTS: 7 total My Users	, <u>oser service summ</u>	My Organization		
Organization PENDING REQUESTS: 7 total My Users 2: New users		My Organization O: New organizations		_

- 1. From the Administration menu, click Audits.
- 2. Click Quarterly User Reports from the Audits drop down menu. The User Audit screen is displayed.

					Security Admin Abston - Covis
er Audit: Quarterly	Jser Audit (Covisin	nt)			
	Quarterly User Audi	t	ſ	Annual Us	er Audit
Deace review the current	status of all active and s	uspended users in v	our Covisint organization. The g	oal of the User Audit is	to validate these users as members
of your company and to re				our of the oser Hudicits	
	d suspended users. Revi	ew the list and make	e any status changes as necessa	ry. Click "continue" wh	en you are finished reviewing this
page. Click on the User Report	liel, to review/eviet a ful	lucor report			
	link to review/print a ful	i user report.			
AUDIT HISTORY					A
					Intable Version 🎯 🚳
2004.01.09 EST		Quarterly User	Audit		^
2004.01.09 EST		Annual User Au	dit		<u></u>
2004.01.09 EST		Annual User Au	dit		
2004.01.09 L31		rinnaar oper ria.	914		
2004.01.09 231					×
J				*	
USER AUDIT Viewing 1 of 16 pages				4	▲ include all division:
USER AUDIT Viewing 1 of 16 pages	user name		last login date	suspend (?)	☐ include all division: permanently remove ⑦ ⑳
USER AUDIT Viewing 1 of 16 pages organization name	user name Partner Assist (re				permanently remove 🧿
USER AUDIT			last login date	2	permanently remove 🧿

- 3. Review the list of all users in the organization that is displayed. (Note: Enabling the *include all divisions* check box will enable you to audit all organizations at your level or below on your company's hierarchy tree).
- Enable the checkbox in the Suspend or Permanently Remove column of each user on the list as necessary. (Note: A user must be 'suspended' before the user can be 'permanently removed'),
- 5. Key in the reason for suspension or permanent removal in the open text box. (Note: A default suspension/permanent removal reason will auto-populate).
- 6. Optionally, enable the checkbox if you choose to send an email to the user(s) notifying them of the change in their account status.
- 7. After you have examined each page of the audit, confirm the audit and log completion on the last screen by clicking **confirm and log audit completion**.

Result

You have successfully logged completion of the quarterly audit requirement. The audit history records the date, the type of audit, and the auditor's ID for past audits.

Performing Annual User Audits

Perform an audit at any time using the User Audit functionality in CCA by completing the following steps:

visint Connection and Administration fo	Roles and Services	•		
COMMON ADMINISTRATOR ACTIONS	Audits	Annual Users Au	dit	
Quick access to the most common admin tasks	in CCA.	Quarterly 🖉ers	Audit	
Organization	Reports		Audits	Last
View my Organization Service Packages	Security Administrator F	eports	Quarterly User Audit	2005.06.30
View my Organization Users	User Summary		Annual User Audit	2006.06.20
Request a Service Package for my Organization	User Service Summary			
PENDING REQUESTS: 7 total				
PENDING REQUESTS: 7 total My Users	Mg	• Organization		
		• Organization New organization:	5	
My Users	0:	-		

- 1. From the Administration menu, click Audits.
- 2. Click Annual User Audits from the Audits drop down menu. The Annual User Audit screen is displayed.

ne . My Prome . My Organizad	ion : Search : Administ	ration : Reports :		Show side
er Audit: Annual User Grant A	udit (Covisint)		Security Admi	n - Covis
Quarterly L	User Audit	ſ	Annual User Audit	
It is strongly suggested that you p	erform a User Audit to susp	end or remove users befor	re reviewing the User Grants.	
Conduct your annual user grant audit fro log your compliance with the annual aud		audited any service package,	, click on the Confirm and Log Audit Completio	n button below t
AUDIT HISTORY				
			I Pri	intable Versior
date of last user audit	Quarterly Audi	t Type	last user audit administrator ID	^
2003.06.17 EDT	Quarterly User A	udit	jdoe1234	
2003.07.07 EDT	Quarterly User A	udit	johndoer3412	
				~
USER GRANTS				
Click on a package or sub-package title compliance using the button at the botto	e below to view the user grants. om of this page in order to com	Note that you must log your plete your audit.	Download a .csv file containing users, and grants for offline revie	all packages, w.
service package name			Last	Confirmed ?
Quality				
Quality				2001.10.07 EDT
Problem Solver				
				2006.11.02 EST
Problem Solver	(2006.11.02 EST
Problem Solver Covisint Advanced Quality Planner	9			
Problem Solver Covisint Advanced Quality Planner GCAC Portal (Members Only)				2003.02.19 EST

3. Click on one service package name to view a list of user in your organizations that have access to the service.

		: Administration : Reports :		Security Admin Abston - Covisi
nual User Grant Au	udit (Covisint)			
	Quarterly User Audit		Annual Us	er Audit
Package/Subpackag	e: One Stop Shop Portal (D	EMO)		
Please review the currer	t status of all active and suspen	ded users in your Covisint organization.	. The goal of the User Audit is	to validate these users as members
of your company and to	record your completion of this v	alidation process.		
of your company and to USER AUDIT	record your completion of this v	alidation process.		
of your company and to	record your completion of this v	alidation process.		include all divisions
of your company and to USER AUDIT	record your completion of this v	date granted/updated	Last Access Date	include all divisions permanently remove ⑦
of your company and to USER AUDIT Viewing 1 of 1 pages			Last Access Date 2006.09.12 EDT	permanently remove ?
of your company and to USER AUDIT Viewing 1 of 1 pages organization name	user name	date granted/updated		permanently remove 🕜

- 4. Optionally, you can click the *show all divisions* checkbox to conduct the audit for all organizations at or below your organization in your organization's hierarchy.
- 5. Enable the checkbox of each service you wish to permanently remove from the targeted user.
- 6. Click continue to next step.
- 7. Repeat steps 4 7 to verify the grants for each additional service package.

Home 🗄 My Profile	: My Organization : Search : Administration	E Reports	📕 Show side nav
			Security Admin Abston - Covisint
User Audit: Annua	l User Grant Audit (Covisint)		
	Quarterly User Audit		Annual User Audit
	r of Covisint, I acknowledge my responsibility for us e list of users in my company with Covisint access a DMPLIANCE		ppropriate representatives of my company.
	audit another package confirm and	log audit completion i w	ill log my compliance later

- 8. Perform one of the following:
 - a. Click confirm and log audit completion if you have finished your audit.
 - b. Click **audit another package** if you need to audit users in an additional service package
 - c. Click **I will log my compliance later** if you are not finished and wish to save your audit thus far and finish the audit at a later time.

Result
You have successfully logged completion of the annual audit requirement. The audit history records the date, the type of audit, and the auditor's ID for past audits.

Need Additional Support?

Contact your Security Administrator for additional help.

Create a Support Request Ticket

If you are a registered Covisint user, and have questions that are not answered in any of these help guides, you may submit a support request ticket.

Removing Invalid Site Codes

At times, a Portal Owner may review invalid codes in the SAO profile for the portal. This is a list of invalid codes available at the "Identify Invalid Codes for [SAO Organization]" screen.

Organization Service Package Screen (SAO Organization as seen by the Portal Owner)



From the Organization Service Packages screen, navigate to the Invalid Site Code screen by clicking **identify invalid site codes**.

Identify Invalid Codes for [SAO Organization] Screen

entify Invalid	Codes for JUN TEST (DRG 3					
-		k the "remove" button to rem have an invalid Site Code for	ove them. Daimler Portal: Access to Merced	es-Benz Cars and Daimler True	ks or have invalid site	codes granted for its sul	o-packages.
Invalid codes							
	business unit	description	street address	town or city	state	postal code	country code
site codes		-					country code
site codes 99001053 A	No Business Unit	99001053 A	covisint test	Covisint city		12345	country code
		99001053 A 99001053 C	covisint test covisint test	Covisint city Covisint city		12345 12345	

From this screen, Portal Owners of an SAO Organization are able to view:

- a list of site codes involved in invalid code grants for users and/or organizations in CCA
- the number of users impacted by the invalid site codes granted on their Portal grant or on application grants (sub-packages).

By clicking the **remove**, the system performs the clean-up actions on invalid grants listed. The system will automatically:

- Revoke the portal grant from each user with an invalid home location code on that portal.
- Revoke a sub-package grant from any user with only invalid associated application site codes remaining.
- Update any user package grant to remove any invalid site code grants.
- Remove any invalid company/division invalid site code from organization portal grants.
- Send sync messages to the portal partner for any effected users.
- Email effected users, notifying them of the changes applied to them.