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**CCA Security Administrator
~ Quick Reference Guide**

Key to Using this Quick Reference Guide

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Section 2: Manage Your Organization's Users   **pages 4 – 7**

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Further assistance is available on the Covisint Support page

  1.   Go to **http://support.covisint.com**

  2.   Click "**Automotive Support**"

  3.   Click "**Training**"

  4.   Click "**Connection and Administration**"

  5.   Download the "**Security Admin User Guide**"

Manage Your User Profile

Who is my Organization Security Administrator

1. Click **My Organization.**

2. Click **View my organization administrators**.

What if the Security Administrator is not valid?. Request help from Covisint via email. Send an email requesting help to: portalsupp@covisint.com

Edit Your User Profile

1. From the **My Profile** drop down menu, click **Edit My Profile.**

2. Modify the information as desired

3. Click **Save Changes.**

.

- The User ID can NEVER be modified
- Hover your mouse over a question mark icon to view help text related to that field
- Be sure to enter an email address to which you have access at any time.

Request Service Packages

1. From the **My Profile** drop down menu, click **Request Service Package**.

2. Click **request** next to the package you wish to request.

3. Enter the reason for request in the open text box.

4. Click **continue**.

5. Repeat steps 1 – 4 as necessary for additional service packages.

Change Your Password

1. From the **My Profile** drop down menu, click **Change Password.**

2. In the New Password open text field, create a new password that adheres to the Covisint password rules.

3. In the Re-enter New Password open text field, key in the newly created password to verify that you have typed it correctly.

4. Click **Submit password change.**

View Your Current Service Package Grants

1. From the **My Profile** drop down menu, click **View my profile**.

2. Click **view service packages** tab.

View Your User Roles

1. From the **My Profile** drop down menu, click **View my profile**.

2. Scroll to the bottom of the screen to view the "user assigned roles" section. If you have roles, they will be listed here.

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Manage Your User Profile

View Your Pending Requests

1. From the **My Profile** drop down menu, click **View my profile**.

2. Click **view pending requests** tab**.**

View History of Your Requests

1. From the **My Profile** drop down menu, click **View my profile**.

2. Click **view request history.**

Cancel a Pending Request

1. From the **My Profile** drop down menu, click **View my profile**.

2. Click **view pending requests** tab**.**

3. Enable the checkbox of each request.

4. Click **cancel pending request**.

5. Click S**ubmit decision.**

Send Pending Request Reminder to Administrator

1. From the **My Profile** drop down menu, click **View my profile**.

2. Click **view pending requests** tab**.**

3. Enable the checkbox of each request

4. Click **Send Reminder**.

5. Key in the reason for reminder.

6. Click **Submit**.

Opt out of email notices

1. From the **My Profile** drop down menu, click **View my profile**

2. Click **email preferences** tab**.**

3. Deselect the checkbox of each item you for which you do not wish to receive notification. (You are not able to opt out of password reset emails for security reasons).

4. Click **Save changes**.

Request New Home Location Code

1. From the **My Profile** drop down menu, click **View my service packages**.

2. Click on the *name of the portal service package* for which you wish to request a new location code.

3. Click **request new home location code**.

4. Enable the radio button of the new home location code.

5. Click **Submit.**

View Your Organization Profile

1. Click **My Organization**.

2. Click **view my organization profile.**

View Your Organization Services

1. Click **My Organization**.

2. Click **view my organization services.**

Need additional Help?

Find additional support at **support.covisint.com**

Manage Your Organization's Users

Search My Organization Users

1. From the **search** drop down menu, click **Search for Users in my Organization**.

2. Select search criteria.

3. Click **Search**.

View My Organization Users

1. From the My Organization drop down menu, click **View My Organization Users.**

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

Reset a User's Password

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **reset user password**.

4. Validate the user's identity via the security questions.

5. Click **reset password.**

6. Read first half of password to user.

7. Instruct user to obtain second half of password from his/her email account.

8. Inform user that after logging in with this newly created, temporary password, the user will be prompted / required to change the password.

Specify a User's Password

1. Perform a user search.

2. From the search results, click on the *name of the user.*

3. Click **specify user password**.

4. Validate the user's identity via the security questions.

5. In the *first* New password open text field, key in a new password for this user.

6. In the *second* New Password open text field, key in the password again.

7. State the password to the user.

8. Click **Submit Password Change.** Inform user he/she will be forced to change this temporary password upon the next login.

Edit a User's Profile

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **edit user profile.**

4. Modify the profile as necessary.

5. Click **Save changes.**

Modify a User's Role

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **modify roles.**

4. Enable the checkbox of each role you wish to grant to the user.

5. Click **submit.**

6. Click **OK**.

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Manage Your Organization's Users

Move a User

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

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **move user**.

4. Enable the radio button of the target for this user.

5. Click **continue.**

6. Click **OK**.

Suspend a User's Account

1. Perform a user search.

2. From the search results, click on the *name of the user.*

3. Click **suspend user**.

4. Key in the reason for suspending the account in the open text box.

5. Click **yes, suspend user.**

Unsuspend a User's Account

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **unsuspend user.**

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

5. Click **yes, activate user.**

Permanently Remove a User Account

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **permanently remove user.**

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

5. Click **yes, permanently remove user.**

Grant Service Package to User

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **add service package.**

4. Enable the checkbox of each service package you wish to grant to this user.

5. Click **add checked...**

6. Click **continue**.

7. Click **submit**.

Remove Service Package from User

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **view service packages** tab**.**

4. Click on the *name of the service package* you wish to remove..

5. Click **permanently remove service package.**

6. Key in the reason for removing package**.**

7. Click **continue.** The package is removed**.**

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Manage Your Organization's Users

Invite User to Register for New Account

1. Click **Invite Users** from the Administration -> Invite drop down menu.

2. Key in the email address for each recipient you wish to invite, separated by semi-colon (;)

3. Click **send invitation**.

4. Click **OK**.

> ⚠️ **Notes**:
>
> • 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.
>
> • Do not modify the text of the email invitation, as editing the actual invitation URL within the subject text could break the link.

Approve Pending New User Account Requests

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

2. Click 📄 to view details of request.

3. Enable the 'approve' radio button.

4. Click **submit decision.**

5. Click **OK**.

Reject Pending New User Account Requests

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

2. Click 📄 to view details of request.

3. Enable the 'reject' radio button.

4. Key in the rejection reason in the open text box.

5. Click **submit decision.**

6. Click **OK**.

> ℹ️ When you reject a new user request, all service package requests for that user are automatically rejected.

Approve User's Pending Service Package Request

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

2. Click the **User Service Package** tab.

3. Click 📄 to view details of request.

4. Enable the 'approve' radio button.

5. Click **submit decision.**

6. Click **OK**.

Reject User's Pending Service Package Request

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

2. Click the **User Service Package** tab.

3. Click 📄 to view details of request.

4. Key in the rejection reason in the open text box.

5. Enable the 'reject' radio button.

6. Click **submit decision.**

7. Click **OK**.

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Manage Your Organization's Users

Approve User's Pending Home Location Code Request

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

2. Click the **home location code** tab.

3. Click 📄 to view details of request.

4. Enable the 'approve' radio button.

5. Click **submit decision.**

6. Click **OK**.

Reject User's Pending Home Location Code Request

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

2. Click the **home location code** tab.

3. Click 📄 to view details of request.

4. Key in the rejection reason in the open text box.

5. Enable the 'reject' radio button.

6. Click **submit decision.**

7. Click **OK**.

Approve User's Pending Site Code Requests

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

2. Click **user site code** tab.

3. Click 📄 to view details of request.

4. Enable the 'approve' radio button for the site code.

5. Click **submit decision.**

6. Click **OK**.

Reject User's Pending Site Code Requests

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

2. Click **user site code** tab.

3. Click 📄 to view details of request.

4. Enable the 'reject' radio button for the site code.

5. Key in the rejection reason in the open text box.

6. Click **submit decision.**

7. Click **OK**.

View User's Pending Requests

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **view pending requests**.

View User's Request History

1. Perform a user search.

2. From the search results, click on the *name of the user*.

3. Click **view request history.**

4. If you wish to view additional details, click on the item name in the "request type" column.

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Manage Your Organization

View Organization Service Packages

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view service packages** tab. From this screen, you are able to view packages and sub packages to which your organization currently has access.

View Organization Hierarchy (within CCA)

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view hierarchy** tab. (To view an organization, click on its name within the tree).

View Organization Users

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view user** tab. All users registered in the organization are displayed.

View Organization Administrators

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view administrator** tab. All administrators in the organization are displayed.

Edit Your Organization Profile

1. Click **view my organization profile** from the My Organization drop down menu.

2. Click **edit organization profile**.

3. Edit as desired.

4. Click **submit changes.**

View Pending Organization Requests

1. Click **view my organization profile** from the My Organization drop down menu.

2. Click **view pending requests**.

Request Service Package for your Organization

1. Click **Request a Service Package for my organization** from the My Organization drop down menu.

2. Click **request** next to the desired package.

3. Key in the reason for request in the open text box.

4. Click **continue**. This request for service packages is submitted to the approving administrator.

Request a Sub-Package for Your Organization

1. Click **Request a Service Package for my organization** from the My Organization drop down menu.

2. Click **request sub package** next to the desired package.

3. Click **request**. This request for sub- package is submitted to the approving administrator.

Manage Your Organization

Suspend a Package from Organization

1. Click **View my organization service packages** from the My Organization drop down menu.

2. Click on the *name of the service package..*

3. Click **suspend.**

4. Key in the suspension reason.

5. Click **yes, proceed with suspension.**

Permanently Remove a Suspended Service Package

1. Click **view my organization** service packages from the my profile drop down menu.

2. Click on the *name of the suspended service package*.

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.**

Generate Reports

1. Click **Reports.**

2. Click on the *name of the report* you wish to generate..

3. Select all required information.

4. Select report criteria.

5. Click **Submit.**

Perform Audits

1. Click **Audits** from the Administration drop down menu.

2. Click on the *type of audit* you wish to perform*.*

3. Enable the appropriate check boxes and /.or select information.

4. Click **Submit**.

Reminders for managing organizations:
- 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. 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.

- Actions taken at the Organization level impact all divisions below.

Manage Your Organization

Service Authority Organization (SAO) 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

Changing the Service Authority Organization (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.
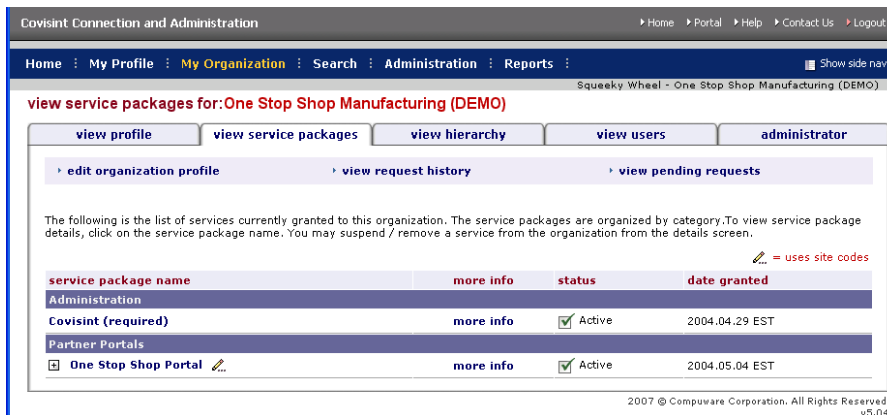
2. Click on the *name of the portal service package* for which you wish to change the SAO designation.
   The Details Screen for that service package is displayed.
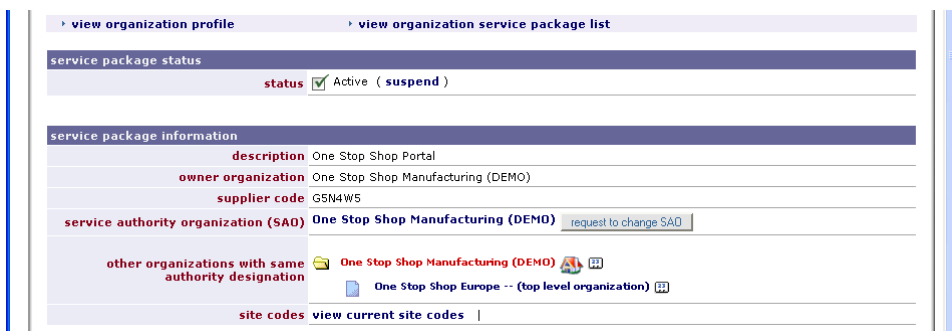
3. Click **request to change SAO**.

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**.

Manage Your Organization
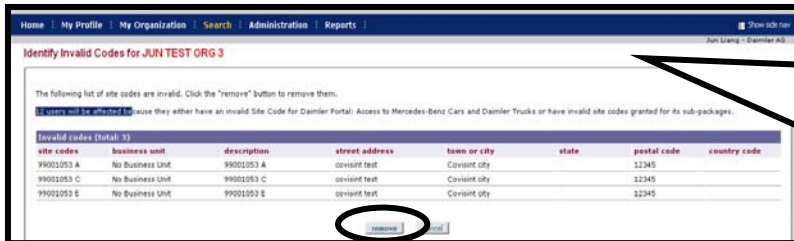
Removing Invalid Site Codes

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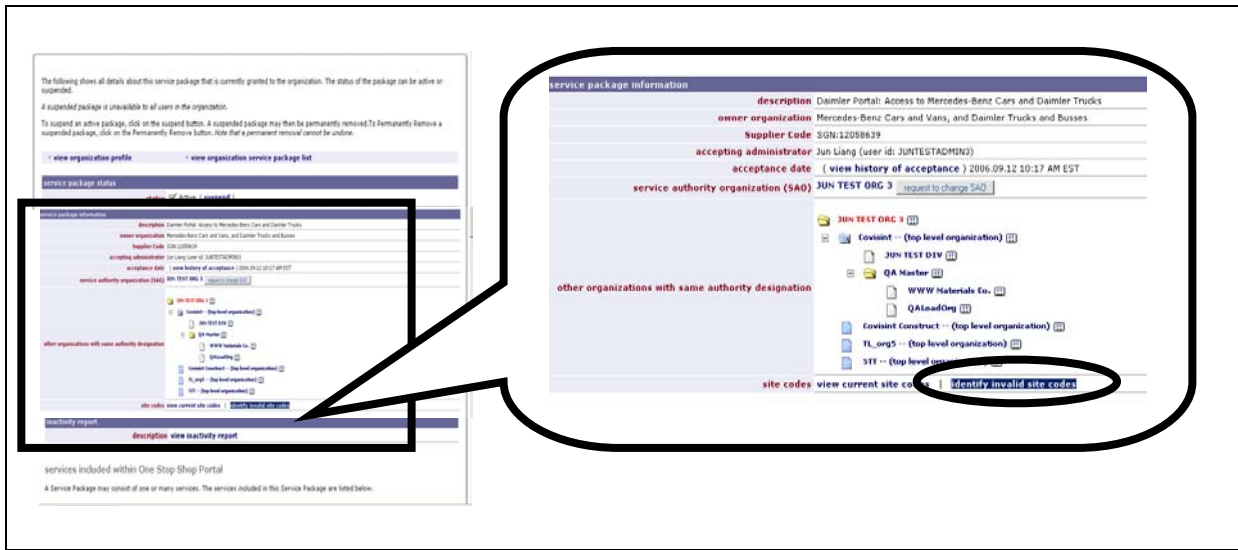
From the Organization Service Packages screen, navigate to the Invalid Site Code screen by clicking **identify invalid site codes.**

Identify Invalid Codes for [SAO Organization] Screen

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.

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Manage Divisions in Your Org.

View Division Users

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view hierarchy** tab.

3. Click on the *name of the division*.

4. Click **view user** tab. All users registered in the selected division are displayed.

View Division Administrators

1. Click **View my Organization Profile** from the My Organization drop down menu.

2. Click the **view hierarchy** tab.

3. Click on the *name of the division*.

4. Click **view administrator** tab. All administrators in the selected division are displayed.

View Division Hierarchy

1. Click **view my organization hierarchy** from the My Organization drop down menu.

2. Click on the *name of the division*. The division hierarchy is displayed.

View Division Service Packages

1. Click **Search for divisions in my hierarchy** from the Search drop down menu.

2. From the search results, click on the *division name*.

3. Click **view service packages** tab**.**

View Division Request History

1. Click **View my organization hierarchy** from the My Organization drop down menu.

2. From the search results, click on the *division name.*

3. Click **view request history**.

View Division Grant History

1. Click **View my organization hierarchy** from the My Organization drop down menu.

2. From the search results, click on the *division name.*

3. Click **view grant history**.

Reminders for managing divisions:

- Actions taken on a division impact that division, and all divisions below

- When granting service packages to a division, the division must be at a lower tier in the hierarchy then the parent organization, and the parent organization must have access to the service package.

- Once a service package is permanently removed from a division, it can no longer be reinstated.

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Manage Divisions in Your Org.

Edit Division Profile

1. Click **Search for divisions in my hierarchy** from the Search drop down menu.

2. From the search results, click on the *division name*.

3. Click **edit organization profile.**

4. Edit as necessary.

5. Click **save changes**.

Grant Service Packages to Division

1. Click **View my organization hierarchy** from the My Organization drop down menu.

2. From the search results, click on the *division name*.

3. Click **view service packages** tab**.**

4. click **add service package**.

5. Click **add**.

6. Click **continue**.

Suspend a Service Package from a Division

1. Click **View my Organization hierarchy** from the My Organization drop down menu.

2. Click on the *name of the division*.

3. Click **view service packages** tab.

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

5. Click **suspend**.

6. Key in the reason for suspension in the open text box.

7. Click **yes, proceed with suspension**.

Permanently Remove Service Package from a Division

1. Click **View my Organization hierarchy** from the My Organization drop down menu.

2. Click on the *name of the division*.

3. Click **view service packages** tab.

4. Click on the *name of the suspended service package.*

5. Click **permanently remove organization's grant for service package**.

6. Key in the *reason for suspension* in the open text box.

7. Click **yes, proceed with suspension**.

Approve Division's Service Package Request

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

2. Click 📄 next to the division name.

3. Enable the 'approve' radio button next to the selected service package.

4. Click **submit decision.**

5. Click **OK**.

Reject Division's Service Package Request

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

2. Click 📄 next to the division name.

3. Enable the 'reject' radio button next to the selected service package.

4. Key in the rejection reason in the open text box.

5. Click **submit decision.**

6. Click **OK**.