


Using This Help Section

- **Expand a section:** Click the + link next to a bookmark in order to expand it and view contents within the bookmark.
- **Navigate:** Click on a bookmark to jump to that section.
- **Print a specific bookmark:** Print out a particular bookmark by right clicking on the bookmark, and then selecting **Print Page(s)**. (If you right click on a 'parent' bookmark, all of the 'child' bookmarks will print as well).
- **Print the entire help document:** Click  (Print icon) in the toolbar, or click **File / Print**, then click **OK**.



Introduction

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.



There are several administrator roles available in CCA that can be assigned to users. These roles can be used independently or multiple roles can be combined for a broader variety of administrative options. The available roles include:

Organization Password Administrator - Searches for users' profiles and resets users' passwords.

Organization Security Administrator - Administers a *specific* service package as well as sub-packages associated with it.

User Account Administrator – Rejects or approves new user requests. (This role is appropriate for someone in a position to confirm that the user should have access to the secured portal).

Security Administrator - A superset of all administrator rights and responsibilities. An organization can have as many or as few administrators as desired.

The following section displays roles / privileges in two ways. First, [Table 1](#) is comprised of privileges associated per role in a matrix view. Second, [Figure 1](#) is comprised of privileges associated per role in a list view.

Table 1:

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

Table 1:

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

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

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
- 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

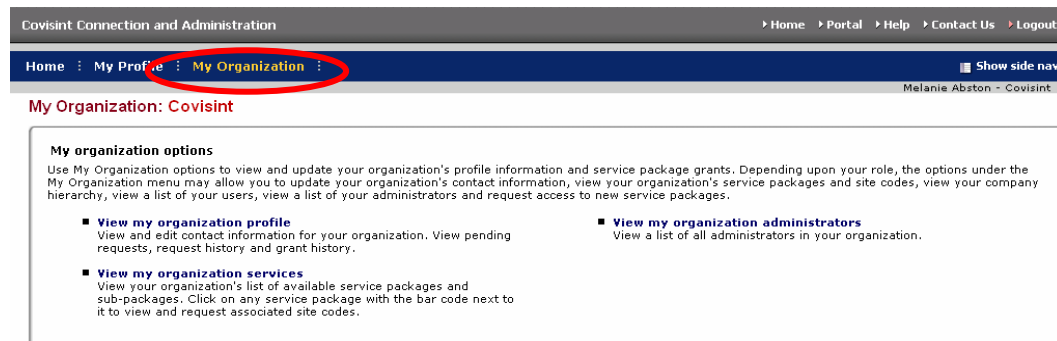
Who is my Organization Security Administrator?



Your first line of support should be the Security Administrator(s) for your organization, as defined below. If you have questions or need support, seek assistance from your Security Administrator. Work steps for determining “who is my administrator” are described in this module.

Complete the following steps to view your organization administrator(s).

1. Click **My Organization** from the CCA home screen. The My Organization Options screen is displayed.



2. Click **View my organization administrators**. A list of all Security Administrators for your organization is displayed.

What if the Security Administrator is not valid?. (In situations where that person has left the company, or is on a leave of absence, for example). When this is the case, you may request help from Covisint via email. At that time, Covisint's Portal Support Team will send you the necessary forms to complete, sign, and fax back to Covisint in order to assist you in obtaining a new Security Administrator for your company. Send an email requesting help to: portalsupp@covisint.com Please be sure to include the following in your email:



- Subject line: Security Admin is Invalid
- Your name and contact information
- Your User ID
- Your Administrator's name and User ID (as listed in the system)
- Specify your request, such as “the only active administrator for my company no longer works here. Please send me the necessary forms so that I can request a new Security Administrator for my company”.





Result

You have successfully viewed all Security Administrators for your organization.

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.

Please keep the User Profile current. Fields marked with an asterisk (*) are required. Click Save Changes when finished.

user information	
	* = required fields
Status:	<input checked="" type="checkbox"/> Active
User ID:	MABSTONSTG
Company/Division Name:	Covisint
Prefix:	<input type="text"/> (Mr., Mrs., Ms., Miss)
*First Name:	<input type="text"/> Melanie
Middle Name:	<input type="text"/>
*Last Name:	<input type="text"/> Abston
Job Title:	<input type="text"/>
*Address 1:	<input type="text"/> 1 Campus Martius
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
*City/Region:	<input type="text"/> Detroit
*State/Province:	<input type="text"/> MI
*Postal Code:	<input type="text"/> 48226
*Country:	<input type="text"/> UNITED STATES 
*Phone Number:	<input type="text"/> 313.227.7300 
Mobile Phone Number:	<input type="text"/>
Fax Number:	<input type="text"/>
*Email Address:	<input type="text"/> mabston@covisint.com
Wireless Email Address:	<input type="text"/> 
*Time Zone:	<input type="text"/> (GMT-05:00) Eastern Time (US & Canada)
*Language Preference:	<input type="text"/> English 
*Challenge Question:	<input type="text"/> Dog's name <p>Note: In case you forget your password, you will be asked to answer a challenge question based on what you input in the text box above. Examples: What is my Mother's Maiden Name? What was the name of my high school? There is a 255 character limit on the question and the answer. Both the question and the answer will be accessible to your Security Administrator.</p>
*Challenge Answer:	<input type="text"/> Coco Chanel <p>Note: To reset a forgotten password, your answer must match <i>exactly</i> what you input into the text box above. The answer is case and punctuation sensitive. Both the question and the answer will be accessible to your Security Administrator.</p>

The User ID can NEVER be modified.

Throughout this application, hover your mouse over a question mark icon to view help text related to that field.

The email address entered here is the email address where all system-related correspondence will be delivered, such as registration approval, changes to your profile or access. This is also the address where your password will be delivered if a reset is necessary. Be sure to enter an email address to which you have access at any time.

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.



Details about the Challenge Question and Challenge Answer fields.

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.

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : **My Profile** : My Organization : Show side nav

Melanie Abston - Covisint Steps: 1

request service package: Melanie Abston

The following list contains all service packages currently offered by Covisint and other Covisint members. Please indicate the service packages you require by clicking the buttons below:

\$ = per user fees apply ☒ = subscribed to by your parent company ? = additional information needed

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' link below.	<input checked="" type="checkbox"/>	access granted	more info
request sub-package (application package)			
DaimlerChrysler Content Management	<input checked="" type="checkbox"/>	request	more info
Covisint Internal Applications			
CAS - Covisint Internal	<input checked="" type="checkbox"/>	request	more info
Covisint Time Tracker	<input checked="" type="checkbox"/>	request	more info
GRID - Covisint Access	<input checked="" type="checkbox"/>	request	more info
Covisint Supplied Services			
Asset Recovery System	\$ <input checked="" type="checkbox"/>	request	more info
CATS	<input checked="" type="checkbox"/>	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.



Note: You are only able to be approved for service packages already granted to your organization. If you request a service or sub-package that is not already granted to your organization, your administrator will need to request those services on behalf of the organization before granting them to you.

[Click here for steps on how to view the service packages granted to your Org.](#)

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.



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

[Home](#) : [My Profile](#) : [My Organization](#) : [Show side nav](#)

Melanie Abston - Covisint

view profile for: **Melanie Abston**

view profile

view service packages

[edit user profile](#)
[change user password](#)
[request service package](#)

[view pending requests](#)
[view request history](#)
[email preferences](#)

Detailed profile information for this user ID is listed below. If you are able to perform updates or actions on this account, the option links below will allow you to perform the activity indicated.

user status

Status ☒ Active

user profile

User Name	Melanie Abston	User ID	MABSTONSTG
Company/Division	Covisint	Job Title	
Address 1	1 Campus Martius	Email Address	mabston@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)

user assigned roles

Role Name	Description	date granted
no role is found		

If you wish to...	Then...
View your current service package grants	<ol style="list-style-type: none"> 1. Click My Profile menu. 2. 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	<ol style="list-style-type: none"> 1. Click My Profile menu. 2. Click View my profile option. 3. Scroll to the bottom of the screen to the 'user assigned roles' section to view the list.
View pending requests you have submitted	<ol style="list-style-type: none"> 1. Click My Profile menu.

If you wish to...	Then...
	<ol style="list-style-type: none"> 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.
<p>Send a reminder to the administrator regarding a pending request</p>	<ol style="list-style-type: none"> 1. Click My Profile menu. 2. Click View my profile option. 3. Click View pending requests. The View pending requests screen is displayed. 4. 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.
<p>Cancel a pending request</p>	<ol style="list-style-type: none"> 1. Click My Profile menu. 2. Click View my profile option. 3. Click View pending requests. The View service packages screen is displayed. 4. Enable the checkbox of each request you wish to cancel. 5. Click cancel pending request. 6. Click submit decision. The request is removed from the Administrator's queue.
<p>Opt out of auto-generated email</p>	<p>(The system automatically sends email notifications for many items. You may</p>

If you wish to...	Then...
	<p>opt out of certain email notification by following the steps provided here)</p> <ol style="list-style-type: none"> 1. Click My Profile menu. 2. Click View my profile option. 3. Click email preferences. The Update your email preferences screen is displayed. 4. 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.
<p>View the history of your requests</p>	<ol style="list-style-type: none"> 1. Click My Profile menu. 2. Click View my profile option. 3. 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
<p>You have successfully performed additional profile management options.</p>

Request New Home Location Code

1. From the Home screen, click **My Profile**.
2. Click **View my service packages**.
3. Click on the name of the portal service package (i.e. Ford Supplier Portal) for which you wish to request a new location code.

Home : **My Profile** : My Organization : Show side nav

Melanie Abston - Covisint

One Stop Shop Portal (DEMO) details for: Melanie Abston

The following shows all details about the service package One Stop Shop Portal (DEMO), which is currently granted to this User ID. The status of the package can be active or suspended. If a package is suspended, it is inaccessible to this User ID.

[view user profile](#)
[view user service package list](#)

service package status

status ☒ Active

[permanently remove service package](#)

service package information

description One Stop Shop Portal (DEMO)

home location code COV001 [request new home location code](#)

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

Melanie Abston - Covisint

Request new home location code for Service One Stop Shop Portal (DEMO) for Melanie Abston

You may request a new home location code from the list below to be made available in conjunction with your access to this Service.

Your current home location code is: COV001

select home location code

select	home location code	description	street address	town or city	state	postal code	country code
<input type="radio"/>	H5F4T4	Mmctest	Mmctest	Mmctest		mmctest	AQ
<input type="radio"/>	H6J1D2	testlocation	testlocation	testlocation		testlocati	AL
<input checked="" type="radio"/>	H7V2A3	Testrecord	Testrecord	Testrecord		testrecord	AL
<input type="radio"/>	H7X1M1	Aaachild2	Aaachild2	Aaachild2		aaachild2	AF
<input type="radio"/>	H7X3B5	Aaachild	Aaachild	Aaachild		aaachild	AF
<input type="radio"/>	H7X3B8	Aaultimate	Aaultimate	Aaultimate		aaaultimat	AF

[submit](#)
[cancel](#)

5. Enable the radio button of the new home location code, then click **Submit**. You will receive an email with the approval decision from your administrator.

Result
You have successfully requested a new home location code.

Service Administrator Tasks

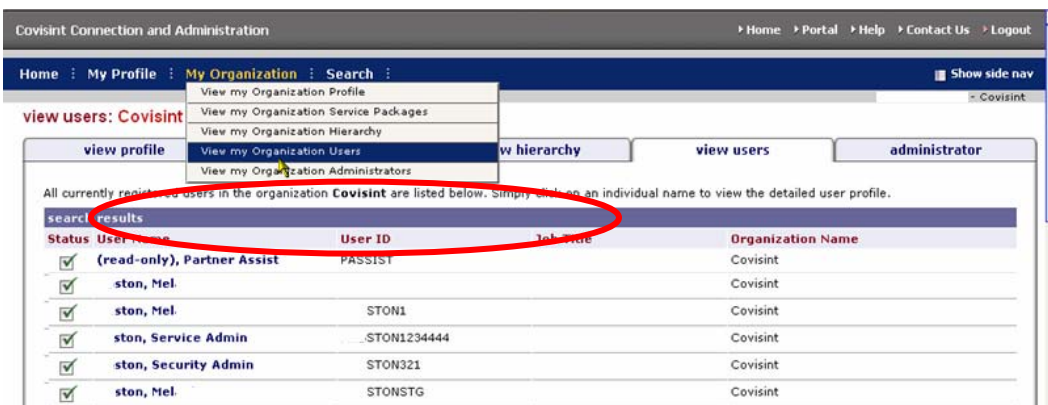
Viewing Users in your Organization

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.



User 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.

The screenshot shows the 'Covisint Connection and Administration' interface. The navigation bar includes links for Home, My Profile, My Organization, and Search. The 'Search' link is circled in red. Below the navigation bar, the 'search for user' section is visible. It includes a 'Basic Search for User' form with the following fields and options:

- organization name**: A text input field.
- Basic Search for User**: A section header.
- Search for users based on user profile information. Enter the criteria, check any filter options to refine your search, and click the search button.**: A descriptive text.
- Basic Search for User**: A sub-section header.
- * required fields**: A red asterisk indicating required fields.
- user name:** A dropdown menu with 'last name, first name' selected.
- begins with**: A dropdown menu.
- search tips**: A link.
- filter options:** A section for refining search results.
- filter options (EXCLUDE these from my results):**: A list of checkboxes for filtering results.
 - ☐ Active
 - ☐ Pending
 - ☐ Suspended
 - ☐ Permanently Removed
 - ☐ Rejected
 - ☐ All divisions ?
- results per page:** A dropdown menu set to '50'.
- search**: A button to execute the 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.

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : **Search** : Show side nav

search for user Covisint

organization name

search for user

The results of your search appear below. Click on a user name to view details. Scroll down to enter new search criteria or click [help](#) for Search Tips.

Status	User Name	User ID	Job Title	Organization Name
✓	Test, Teamroom	TRTEST1		Covisint
✓	Test, Jane	GOBLUE2006		Covisint
✓	test, rob	ROB717TEST3		Covisint
✓	test, John	ROB715TESTUSER2		Covisint
✗	test, Bob	GOBLUE2003		Covisint
✗	Test, Barb	DIVISIONTEST		Covisint II
🗑	test, Jack	JTEST1234		Test Division



User 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)

Result

You have successfully searched for a user in your organization.

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.



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. For example, 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.

Users must be approved access to the Service Package called "Content Management", and then must request access to the sub-package for the appropriate 'customer version' of the Content Management Application. Therefore, the user would perform the following process to gain access to a 'customer version' of the 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) for which you are the Administrator.

1. Perform a User Search. [Refer to the previous section entitled Searching for Users in your Organization for details.](#) The User Search result screen is displayed.

Covisint Connection and Administration

Home : My Profile : My Organization : **Search** : Show side nav

search for user

organization name

search for user

The results of your search appear below. Click on a user name to view details. Scroll down to enter new search criteria or click **help** for Search Tips.

search results

Status	User Name	User ID	Job Title	Organization Name
X	Abba, Queen	TRAININGADMIN123		Covisint Europe
✓	Admin, Training	TRAININGADMIN		Covisint

Viewing 1 - 2 of 2

Show 50 per page

Basic Search for User

Search for users based on user profile information. Enter the criteria, check any filter options to refine your search, and click the search button.

Basic Search for User

* required fields

user name: user id begins with trained search tips

filter options: filter options (EXCLUDE these from my results):

☐ Active ☐ Pending ☐ Suspended

☐ Permanently Removed ☐ Rejected ☐ All divisions ?

results per page: 50

search

- 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 Administration

Home : My Profile : My Organization : Search : **Administration** : Reports : Show side nav

view profile for: Training Admin

view profile view service packages

add service package view pending requests view request history

Detailed profile information for this user ID is listed below. If you are able to perform updates or actions on this account, the option links below will allow you to perform the activity indicated.

user status

Status ☒ Active

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	
Postal Code	48034	Language Preference	English
Country	UNITED STATES	Time Zone	(GMT-05:00) Eastern Time (US & Canada)

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

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : Search : Administration : Reports : Show side nav

add service package: Training Admin Steps: 1 2 3 4


The service packages available to grant to Training Admin 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 package. For more information about a service package, simply click on the 'more info' link.

Partner Portals
Users may also be granted access to Covisint's Partner Supplier Portals and their sub-packages from this page. If your organization subscribes to one of the partner portals, you may assign sub-packages by clicking on the 'sub-packages' button under the '**key portals**' sub-heading.

service packages		more info
Content Management Applications		
Content Management	<input checked="" type="checkbox"/>	more info
Quality		
Problem Solver	<input type="checkbox"/>	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.

1. Perform a User Search. [Refer to the previous section entitled Searching for Users in your Organization for details.](#) The User Search result screen is displayed.

Covisint Connection and Administration

Home : My Profile : My Organization : **Search** : Show side nav

search for user

organization name

search for user

The results of your search appear below. Click on a user name to view details. Scroll down to enter new search criteria or click **help** for Search Tips.

search results

Status	User Name	User ID	Job Title	Organization Name
	Abba Quesada	TRAININGADMIN123		Covisint Europe
	Admin, Training	TRAININGADMIN		Covisint

Viewing 1 - 2 of 2

Show 50 per page

Basic Search for User

Search for users based on user profile information. Enter the criteria, check any filter options to refine your search, and click the search button.

Basic Search for User

* required fields

user name: user id begins with trainingad search tips

filter options: filter options (EXCLUDE these from my results):

☐ Active ☐ Pending ☐ Suspended

☐ Permanently Removed ☐ Rejected ☐ All divisions ?

results per page: 50

search

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

Covisint Connection and Administration

Home : My Profile : My Organization : Search : **Administration** : Reports : Show side nav

view service packages for: Training Admin

view profile view service packages

add service package view pending requests view request history

The service packages currently granted to this user ID are listed below. The service packages are organized by Category.

Click on a Service Package Name to view details about the service package. Administrators may click on a service package name to remove the service package access from this user ID.

service package name home location code more info status status for organization date granted/updated

service package name	home location code	more info	status	status for organization	date granted/updated
Covisint Supplied Services					
Covisint Teamroom		more info	Active	Active	2007.01.10 EST

... = uses site codes

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

Covisint Connection and Administration

Home Portal Help Contact Us Logout

Home My Profile My Organization Search Administration Reports Show side nav

view service packages for: Jane Doe

view profile view service packages

add service package view pending requests view request history

The service packages currently granted to this user ID are listed below. The service packages are organized by Category. Click on a Service Package Name to view details about the service package. Administrators may click on a service package name to remove the service package access from this user ID.

service package name home location code more info status status for organization date granted/updated

service package name	home location code	more info	status	status for organization	date granted/updated
Administration					
Secure File Exchange Administration (Covisint Owned)		more info	Active	Active	2006.10.18 EDT
Content Management Applications					
Content Management		more info	Active	Active	2004.05.07 EDT

= uses site codes

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

Covisint Connection and Administration

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Secure File Exchange Administration (Covisint Owned) details for: Jane Doe

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 (Covisint Owned)

services included within Secure File Exchange Administration (Covisint Owned)
A Service Package may consist of one or many services. The services included in this Service Package are listed below.

service name	more info
Covisint Supplied Services	
Secure File Exchange Administration	more info

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

Covisint Connection and Administration

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Service Admin. abston - Covisint

Permanently Remove User Access > Enter Removal Reason

You have selected to remove Melanie Abston's access to the following service/sub-service package(s). A removal reason must be entered before submitting. Enter a removal reason in the box(es) below. This reason will be logged.

* required fields

removal reason(s)				
<table border="1"> <thead> <tr> <th>service/sub-service package name</th> <th>removal reason*</th> </tr> </thead> <tbody> <tr> <td>Secure File Exchange Administration (Covisint Owned)</td> <td></td> </tr> </tbody> </table>	service/sub-service package name	removal reason*	Secure File Exchange Administration (Covisint Owned)	
service/sub-service package name	removal reason*			
Secure File Exchange Administration (Covisint Owned)				

☒ Check this box to generate an email to the user notifying them of the status change

continue cancel

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 other 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.

Viewing a User's Pending Requests

Administrators receive email alerts when a user requests access to an service owned by the Service Administrator. 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.

1. Perform a User Search. [Refer to the previous section entitled *Searching for Users in your Organization for details.*](#) The User Search result screen is displayed.

The screenshot shows the 'search for user' interface. At the top, there's a navigation bar with links like Home, My Profile, My Organization, Search, Administration, and Reports. Below this, a search bar is visible. The search results are displayed in a table with columns: Status, User Name, User ID, Job Title, and Organization Name. The first result is 'Admin, Training' with User ID 'TRAININGADMIN' and Organization 'Covisint'. Below the table, there's a 'Basic Search for User' section with various filters and a search button.

Status	User Name	User ID	Job Title	Organization Name
<input checked="" type="checkbox"/>	Admin, Training	TRAININGADMIN		Covisint

Viewing 1 - 1 of 1

Basic Search for User

Search for users based on user profile information. Enter the criteria, check any filter options to refine your search, and click the search button.

Basic Search for User

user name: last name, first name begins with admin, training search tips

filter options: filter options (EXCLUDE these from my results):

☐ Active ☐ Pending ☐ Suspended

☐ Permanently Removed ☐ Rejected ☐ All divisions ?

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.

The screenshot shows the 'view profile for: Training Admin' interface. At the top, there's a navigation bar with links like Home, My Profile, My Organization, Search, Administration, and Reports. Below this, a search bar is visible. The search results are displayed in a table with columns: Status, User Name, User ID, Job Title, and Organization Name. The first result is 'Admin, Training' with User ID 'TRAININGADMIN' and Organization 'Covisint'. Below the table, there's a 'Basic Search for User' section with various filters and a search button.

view profile for: Training Admin

view profile view service packages

add service package view pending requests view request history

Detailed profile information for this user ID is listed below. If you are able to perform updates or actions on this account, the option links below will allow you to perform the activity indicated.

user status

Status ☒ Active

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)

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

Home : My Profile : My Organization : Search : Administration : Reports : Show side nav

Service Admin. - Covisint

View Pending Requests for: TRAINING ADMIN

The following requests are currently pending approval. The appropriate administrators were notified by email at the time of submission.

pending requests		
request type	request	Date Submitted
Request for User Access to a Service <input checked="" type="checkbox"/>	Library Services - GSS	2007.01.10 EST
Request for User Access to a Service <input checked="" type="checkbox"/>	Covisint Teamroom	2007.01.10 EST

[return to user profile](#)

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.

1. Perform a User Search. [Refer to the previous section entitled *Searching for Users in your Organization for details*](#). The User Search result screen is displayed.

The screenshot shows the 'search for user' interface. At the top, there's a navigation bar with 'Home', 'My Profile', 'My Organization', 'Search', 'Administration', and 'Reports'. Below this, a 'search for user' section displays the results of a search. A table lists the search results with columns: Status, User Name, User ID, Job Title, and Organization Name. One result is shown: 'Admin, Training' (User ID: TRAININGADMIN, Organization: Covisint). Below the table, there's a 'Basic Search for User' section with various filters and a search button.

Status	User Name	User ID	Job Title	Organization Name
<input checked="" type="checkbox"/>	Admin, Training	TRAININGADMIN		Covisint

Viewing 1 - 1 of 1

Show 50 per page

Basic Search for User
Search for users based on user profile information. Enter the criteria, check any filter options to refine your search, and click the search button.

Basic Search for User

* **required fields**

user name: [search tips](#)

filter options: ☐ Active ☐ Pending ☐ Suspended
☐ Permanently Removed ☐ Rejected ☐ All divisions (?)

results per 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.

The screenshot shows the 'view profile' interface for the user 'Admin, Training'. The screen displays user status (Active), user profile information (User Name, User ID, Job Title, Email Address, etc.), and a 'view request history' link circled in red.

view profile

view service packages

[add service package](#) [view pending requests](#) [view request history](#)

Detailed profile information for this user ID is listed below. If you are able to perform updates or actions on this account, the option links below will allow you to perform the activity indicated.

user status

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

Covisint Connection and Administration

Home : My Profile : My Organization : Search : Administration : Reports : Show side nav

Request History for: TRAINING ADMIN

The following table contains all requests excluding those still pending a decision. Click on the request type to view details of a request.

request type	request date	package	site codes	approved	evaluator	decision date
Request for User Access	2003.12.15 EST	Covisint (required)		✓ yes	JDOE	2004.01.05 EST
Request for User Access to a Service	2006.10.16 EDT	Covisint Time Tracker		✓ yes	JDOE	2006.10.16 EDT
Request for User Access to a Service	2007.01.04 EST	Content Management		✓ yes	JDOE	2007.01.05 EST
Request for User Access to a Service	2007.01.04 EST	Covisint Web Connect		✓ yes	JDOE	2007.01.05 EST
Request for User Access to a Service	2007.01.10 EST	Covisint Teamroom		✗ no	Service Admin	2007.01.10 EST

back to user profile

- 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 Organization : Search : Administration : Reports : Show side nav

Service Admin - Covisint

✓ The selected request has already been processed.

historical details of Covisint Teamroom request for: TRAINING ADMIN

This request has already been rejected. The following tables contain information about the request, the decision, and the person who evaluated the request.

decision information	
evaluator name	Service Admin
evaluator user ID	JDOE
decision	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.


Managing a User's Service Package Request

Complete the following steps to manage a user's request for service package(s). Recall that you are only able to grant service package(s) for which you are the Administrator



Note: All requests will 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 will have a reminder sent automatically to the approving administrator(s) five days before the request expires. These rules apply to all pending requests.

1. From the Administration -> Pending Requests menu, click **User Request**. The Review User Pending Approval screen is displayed.

2. Click  in the view request column next to the user name for whom you wish to review the request. The Details screen is displayed.

details of user service package request for:Melanie Abston

Below are the details of the user and the service package requested by this user. Please review the request to determine if this service package is appropriate for this user.
Note that you will be asked to provide a rejection reason on the next screen for any rejected service packages.

Note: If a service is granted to your organization such that a "non-approvable" request becomes "approvable", you will be asked to provide a rejection reason before the change is reflected on the screen.

user information	
Full Name	Melanie Abston
Organization Name	Covisint
Address 1	1 Campus Martius
Address 2	
Address 3	
City/Region	Detroit
State/Province	MI
Postal Code	48226
Country	UNITED STATES
Job Title	
User ID	
Email Address	
Wireless Email Address	
Phone Number	
Mobile Phone Number	
Fax Number	
Time Zone	(GMT-05:00) Eastern Time (US & Canada)
Preferred Language	English

service package request				
approve	reject	service package name	request reason	rejection reason*
<input type="radio"/>	<input checked="" type="radio"/>	Problem Solver	new employee	this is a required when rejecting requests

The text entered in the reject field becomes part of this user's permanent record, and is viewable by other Administrators in your company.

3. Perform one or more of the following:

If you wish to...	Then...
approve the user's access request to a service package	enable the approve radio button next to the selected service package.
reject the user's access request to a service package	<ol style="list-style-type: none"> 1. enable the reject radio button next to the selected service package. 2. key in the reason for the rejection in the open text box. The text you enter in this box becomes part of this user's permanent record, and is viewable by other Administrators in your company.

4. Click **submit decision**.
5. Click **OK** to confirm.

Result
You have successfully approved / rejected a user's access request to a service package.

Viewing Organization Details as Administrator

As the Service Administrator, you are able to view privileged details regarding your organization.

Viewing the Administrator's view of Organization Profile

Covisint Connection and Administration

Home : My Profile : **My Organization** : Search : Administration : Show side nav

organization profile f

view profile view hierarchy view users administrator

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.

organization status within covisint connection and administration

Status: ☒ Active

status options

last quarterly user audit 2005.06.30 performed by jdoe

last annual user grant audit 2006.06.20 performed by EXCHNGOP1

organization information

Name Covisint

Address 1 Campus Martius , Detroit, MI 48226 UNITED STATES

Phone Number URL http://www.covisint.com

Fax Number DUNS Number 0

administrator information

Name	User ID	Job Title	Phone Number
Jane Doe	jdoe1324		313.555.1212
John Doe	jdoe4312		313.555.1212

1. Perform one or more of the following:


If you wish to...	Then...
View the current service packages to which your organization subscribes	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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.

If you wish to...	Then...
CCA	<ul style="list-style-type: none"> 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.
view users within your organization	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 view user tab. All users registered in the selected division are displayed.
view all administrators in your organization	<ul style="list-style-type: none"> 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 administrator tab. All administrators in your organization are displayed.
view administrators in a particular division of your organization	<ul style="list-style-type: none"> 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 <i>name of the division</i>. d. Click administrator tab. All users registered in the selected division are displayed.


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



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 Administration

[Home](#) [Portal](#) [Help](#) [Contact Us](#) [Logout](#)

Home : My Profile : **My Organization** : Search : Administration : Reports : [Show side nav](#)

request service pack

- [View my Organization Profile](#)
- [View my Organization Service Packages](#)
- [View my Organization Hierarchy](#)
- [View my Organization Users](#)
- [Request a Service Package for my Organization](#)
- [View my Organization Administrators](#)

The following list contains the service packages available to your organization and other Covisint members. Please indicate the service packages your organization requires by clicking the **request** link.

\$ = per user fees apply ✓ = subscribed to by your parent company ✎ = additional information needed

service packages			
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' link below.	✓	access granted	more info
▶ request sub-package (application package)			
MOPAR			
Mopar Supercedence Narraty -- 3270	request	access granted	more info
Partner Portals			
DaimlerChrysler Portal: Service for Chrysler Group Sub-packages are bundles of applications available for those approved to access DaimlerChrysler Portal: Service for Chrysler Group. To request a sub-package of DaimlerChrysler Portal: Service for Chrysler Group, please select the 'request sub-package' link below.	✓	 	access granted more info
▶ request sub-package (application package)			
DaimlerChrysler Portal: Service for DaimlerChrysler Services North America Sub-packages are bundles of applications available for those approved to access DaimlerChrysler Portal: Service for DaimlerChrysler Services North America. To request a sub-package of DaimlerChrysler Portal: Service for DaimlerChrysler Services North America, please select the 'request sub-package' link below.	✓	 	access granted more info

Perform one or more of the following

If you wish to...	Then...
<p>Request a service package</p>	<ol style="list-style-type: none"> 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.
<p>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).</p>	<ol style="list-style-type: none"> 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 sub package. This request for sub package is submitted to the approving administrator.

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

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.

Home : My Profile : **My Organization** : Search : Administration : Reports : Show side nav

Service Admin abston - Covisint

view service packages for:Covisint

view profile | view service packages | view hierarchy | view users | administrator

view request history | view pending requests

The following is the list of services currently granted to this organization. The service packages are organized by category. To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen.

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2001.10.07 EDT
Secure File Exchange Administration (Covisint Owned)	more info	Suspended	2007.01.11 EST
Content Management Applications			
Content Management	more info	Active	2002.03.04 EST
DaimlerChrysler Content Management	more info	Active	2002.09.05 EDT
Quality			
Covisint Advanced Quality Planner	more info	Suspended	2006.11.02 EST
Problem Solver	more info	Active	2001.10.07 EDT
Reporting Tools			
Covisint Web Reports	more info	Active	2002.11.01 EST
Crystal Reports Administration	more info	Suspended	2004.07.14 EDT

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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.

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Home My Profile My Organization Search Administration Reports Show side nav

Service Admin abston - Covisint

Problem Solver details for: Covisint

The following shows all details about this service 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 users in the organization.

To suspend an active package, click on the suspend button. A suspended package may then be permanently removed. To Permanently Remove a suspended package, click on the Permanently Remove button. *Note that a permanent removal cannot be undone.*

[view organization profile](#)
[view organization service package list](#)

service package status	
status	<input checked="" type="checkbox"/> Active (suspend)

service package information	
description	Problem Solver
owner organization	Covisint

services included within Problem Solver

A Service Package may consist of one or many services. The services included in this Service Package are listed 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 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.

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.

view service packages for: Covisint

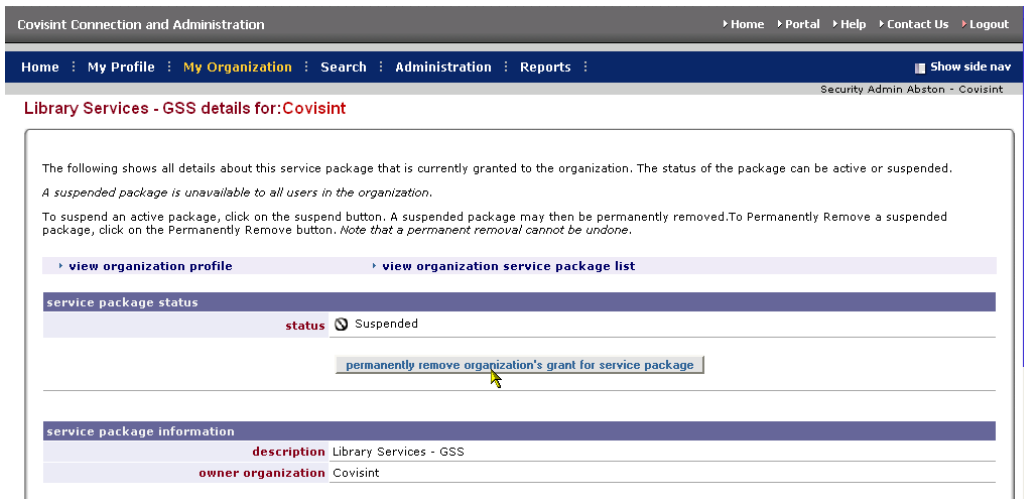
view profile | view service packages | view hierarchy | view users | administrator

view request history | view pending requests

The following is the list of services currently granted to this organization. The service packages are organized by category. To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen.

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2001.10.07 EDT
Secure File Exchange Administration (Covisint Owned)	more info	Suspended	2007.01.11 EST
Content Management Applications			
Content Management	more info	Active	2002.03.04 EST
DaimlerChrysler Content Management	more info	Active	2002.09.05 EDT
Covisint Internal Applications			
CAS - Covisint Internal	more info	Active	2002.03.04 EST
Covisint Time Tracker	more info	Active	2004.01.27 EST
Covisint Web Connect	more info	Active	2003.05.19 EDT
GRID - Online Access	more info	Active	2003.10.10 EDT
Library Services - GSS	more info	Suspended	2004.07.15 EDT
Logistics Dashboard	more info	Active	2003.06.11 EDT
Mitsubishi Electric Supplier Connection	more info	Active	2006.01.18 EST
Supplier Connection	more info	Active	2001.10.07 EDT

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



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.

If you wish to...	Then...
edit your organization profile	<ul style="list-style-type: none">a. Click edit organization profile.b. Edit as desired.c. Click submit changes.
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 Service Administrator, you are able to manage service package(s) for which you are the Administrator.

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



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 Administration Home Portal Help Contact Us Logout

Home My Profile **My Organization** Search Administration Reports Show side nav

request service pack

The following list contains service packages for your organization and other Covisint members. Please indicate the service packages your organization requires by clicking the **request** button.

\$ = per user fees apply ✓ = subscribed to by your parent company ✎ = additional information needed

service packages			
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' link below.	✓	access granted	more info
request sub-package (application package)			
MOPAR			
Mopar Supercedence Narraty -- 3270		request	more info
Partner Portals			
DaimlerChrysler Portal: Service for Chrysler Group Sub-packages are bundles of applications available for those approved to access DaimlerChrysler Portal: Service for Chrysler Group. To request a sub-package of DaimlerChrysler Portal: Service for Chrysler Group, please select the 'request sub-package' link below.	✓ ✎	access granted	more info
request sub-package (application package)			
DaimlerChrysler Portal: Service for DaimlerChrysler Services North America Sub-packages are bundles of applications available for those approved to access DaimlerChrysler Portal: Service for DaimlerChrysler Services North America. To request a sub-package of DaimlerChrysler Portal: Service for DaimlerChrysler Services North America, please select the 'request sub-package' link below.	✓ ✎	access granted	more info

1. Perform one or more of the following

If you wish to...	Then...
Request a service package	<ol style="list-style-type: none"> 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).	<ol style="list-style-type: none"> 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 sub package. This request for sub package is submitted to the approving administrator.

Result
You have successfully requested a package or sub-package for your organization.

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. 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.

Service 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.

view service packages for: Covisint

view profile | view service packages | view hierarchy | view users | administrator

view request history | view pending requests

The following is the list of services currently granted to this organization. The service packages are organized by category. To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen.

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2001.10.07 EDT
Secure File Exchange Administration (Covisint Owned)	more info	Suspended	2007.01.11 EST
Content Management Applications			
Content Management	more info	Active	2002.03.04 EST
DaimlerChrysler Content Management	more info	Active	2002.09.05 EDT
Quality			
Covisint Advanced Quality Planner	more info	Suspended	2006.11.02 EST
Problem Solver	more info	Active	2001.10.07 EDT
Reporting Tools			
Covisint Web Reports	more info	Active	2002.11.01 EST
Crystal Reports Administration	more info	Suspended	2004.07.14 EDT

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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.

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home My Profile My Organization Search Administration Reports Show side nav

Service Admin abston - Covisint

Problem Solver details for:Covisint

The following shows all details about this service 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 users in the organization.

To suspend an active package, click on the suspend button. A suspended package may then be permanently removed. To Permanently Remove a suspended package, click on the Permanently Remove button. *Note that a permanent removal cannot be undone.*

[view organization profile](#)
[view organization service package list](#)

service package status	
status	Active (suspend)

service package information	
description	Problem Solver
owner organization	Covisint

services included within Problem Solver

A Service Package may consist of one or many services. The services included in this Service Package are listed 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. 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

Service 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.



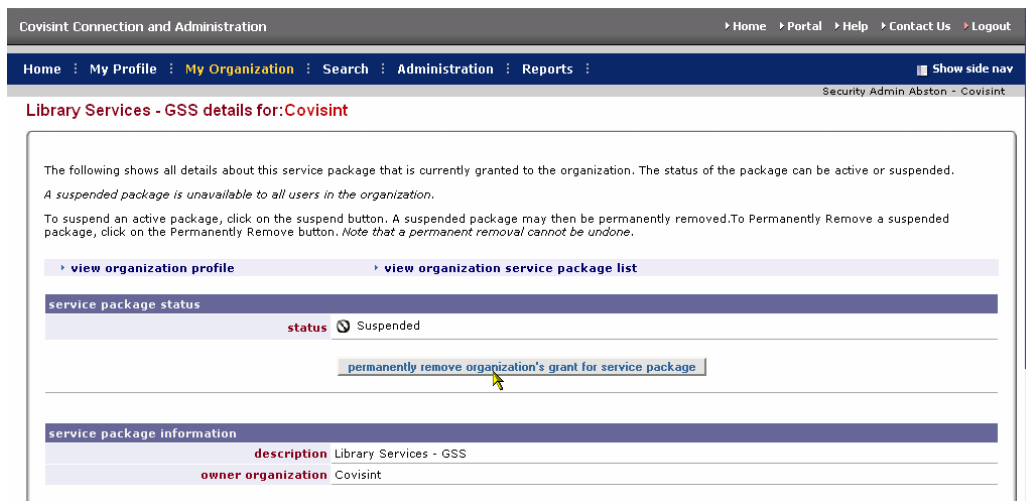
Once permanently removed, the service package is permanently removed from all users in the organization, and all divisions below. The service package cannot be reinstated by Covisint.

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

The screenshot shows the 'view service packages for: Covisint' screen. The interface includes a navigation bar with links like Home, My Profile, My Organization, Search, Administration, and Reports. Below the navigation bar, there are tabs for 'view profile', 'view service packages', 'view hierarchy', 'view users', and 'administrator'. The 'view service packages' tab is selected. The screen displays a list of service packages with columns for 'service package name', 'more info', 'status', and 'date granted'. The 'Library Services - GSS' package is highlighted with a red circle, indicating it is the package to be removed.

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2001.10.07 EDT
Secure File Exchange Administration (Covisint Owned)	more info	Suspended	2007.01.11 EST
Content Management Applications			
Content Management	more info	Active	2002.03.04 EST
DaimlerChrysler Content Management	more info	Active	2002.09.05 EDT
Covisint Internal Applications			
CAS - Covisint Internal	more info	Active	2002.03.04 EST
Covisint Time Tracker	more info	Active	2004.01.27 EST
Covisint Web Connect	more info	Active	2003.05.19 EDT
GRID - Online Access	more info	Active	2003.10.10 EDT
Library Services - GSS	more info	Suspended	2004.07.15 EDT
Logistics Dashboard	more info	Active	2007.10.11 EDT
Mitsubishi Electric Supplier Connection	more info	Active	2006.01.18 EST
Supplier Connection	more info	Active	2001.10.07 EDT

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



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 Service Administrator, you are able to manage service packages for divisions in your organization, if you are the service administrator for that service package. 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

Service 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. (Sub-packages are designed such that the parent package must be granted before the sub-packages 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.

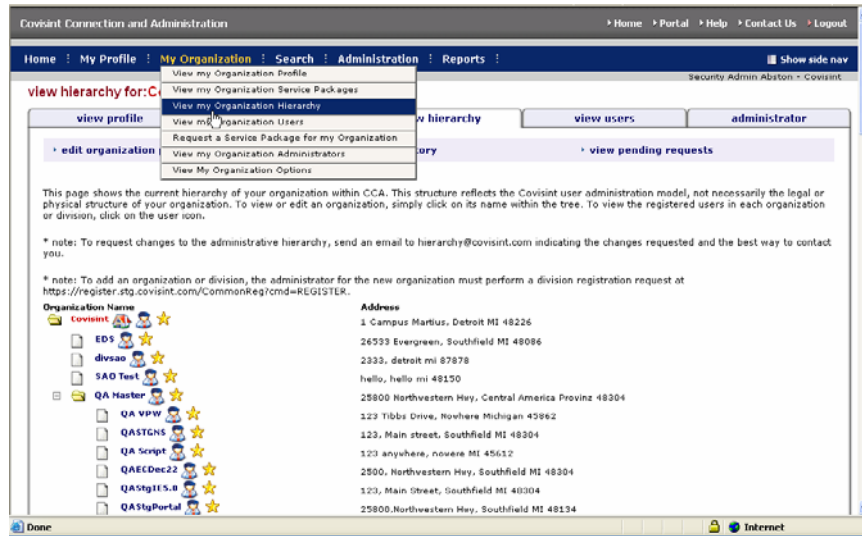


Sub-package – a grantable container that contains at least one sub-service application. The sub-package requires that the parent package be granted first.

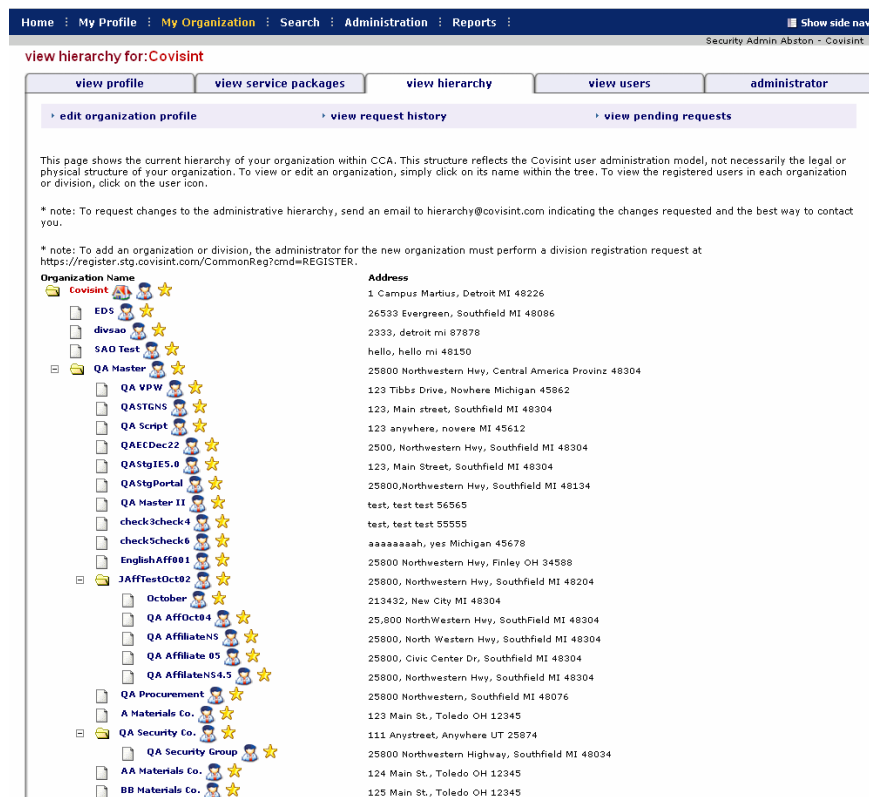
Complete the following steps to grant service packages to divisions in your organization.



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.



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

Home : My Profile : **My Organization** : Search : Administration : Reports : Show side nav

organization profile for:BB Materials Co.

view profile | **view service packages** | view hierarchy | view users | administrator

edit organization profile | add service package | view request history

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.

organization status within covisint connection and administration

Status: ☒ Active (view details)

status options [suspend organization](#)

last quarterly user audit 2005.06.30 performed

last annual user grant audit No previous annual audit

organization information

Name BB Materials Co.

Address 125 Main St. , Toledo, OH 12345 UNITED STATES

Phone Number 555-555-1212 URL

Fax Number DUNS Number

administrator information

Name	User ID	Job Title	Phone 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.

Home : My Profile : My Organization : **Search** : Administration : Reports : Show side nav

view service packages for:BB Materials Co.

view profile | **view service packages** | view hierarchy | view users | administrator

add service package | view request history | view pending requests

The following is the list of services currently granted to this organization. The service packages are organized by category.To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen.

= uses site codes

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	<input checked="" type="checkbox"/> Active	2001.10.07 EDT
Covisint Supplied Services			
Supplier Connection	more info	<input checked="" type="checkbox"/> Active	2001.10.07 EDT
Quality			
Problem Solver	more info	<input checked="" type="checkbox"/> Active	2007.01.12 EST

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

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



Packages already owned by your parent company will be denoted by a check mark



Packages that require additional information are indicated with a pencil icon



Packages that have associated fees are denoted with a dollar sign

Home : My Profile : My Organization : **Search** : Administration : Reports : Show side nav

Service Admin: abston - Covisint

add 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 package. For more information about a service package, simply click on the 'more info' link.

Partner Portals
Users may also be granted access to Covisint's Partner Supplier Portals and their sub-packages from this page. If your organization subscribes to one of the partner portals, you may assign sub-packages by clicking on the 'sub-packages' button under the **'key portals'** sub-heading.

\$ = per user fees apply 🔍 = additional information needed

service packages		
Content Management Applications		
Content Management	add	more info
Quality		
Problem Solver	\$ add	more info

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.

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

Status	View Hierarchy	Organization Name	Address
<input checked="" type="checkbox"/>		A Materials Co.	123 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AA Materials Co.	124 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AAA Materials Co.	150 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BB Materials Co.	125 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BBB Materials Co.	151 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		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.

The screenshot shows the 'view service packages for:BB Materials Co.' page. The 'view service packages' tab is selected. Below the tabs, there are links for 'edit organization profile', 'add service package', and 'view request history'. A table lists the service packages currently granted to the organization:

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2001.10.07 EDT
Covisint Supplied Services			
Supplier Connection	more info	Active	2001.10.07 EDT

A hand cursor is pointing at the 'Supplier Connection' link in the table.

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

The screenshot shows the 'Supplier Connection details for:BB Materials Co.' page. The 'view organization service package list' link is selected. The page displays the status of the service package as 'Active' with a 'suspend' button next to it. A hand cursor is pointing at the 'suspend' button.

Below the status, the 'service package information' section shows:

description	Supplier Connection
owner organization	Covisint

The 'services included within Supplier Connection' section is also visible.

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

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



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



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

1. Complete the following steps to permanently remove a service package from a division.
2. Click **Search for Divisions in my Organization's Hierarchy** from the Search drop down menu. The Search Screen is displayed.

The screenshot shows the 'organization search' screen within the 'Covisint Connection and Administration' application. The top navigation bar includes links for Home, Portal, Help, Contact Us, and Logout. Below this, a secondary navigation bar shows 'Home', 'My Profile', 'My Organization', 'Search', 'Administration', and 'Reports'. The 'Search' dropdown menu is open, showing 'Search for Users in my Organization' and 'Search for Divisions in my Organization's Hierarchy'. The 'organization search' screen has a title 'organization name' and a subtitle 'keyword search for organization'. It instructs the user to 'Enter the organization name, or any portion of the organization name, and click Search.' The search form includes a 'keyword search' input field, a 'filter options' section with checkboxes for 'Active', 'Permanently Removed', 'Pending', 'Rejected', and 'Suspended', and a 'results per page' dropdown set to '50'. A 'search' button is at the bottom.

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

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : **Search** : Administration : Reports : Show side nav

Security Admin Abston - Covisint

organization search result(s):

organization name

organization search result(s):
The results of your search appear below. Click on an organization name to view details. Scroll down to enter new search criteria or click [help](#) for Search Tips.

search results
You searched for: Found: **102 results**

Status	View Hierarchy	Organization Name	Address
<input checked="" type="checkbox"/>		A Materials Co.	123 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AA Materials Co.	124 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AAA Materials Co.	150 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BB Materials Co.	125 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BBB Materials Co.	151 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		CC Materials Co.	126 Main St., Toledo, OH 12345

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

6. Click **view service packages** tab.

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : **Search** : Administration : Reports : Show side nav

Security Admin Abston - Covisint

view service packages for:BB Materials Co.

view profile | **view service packages** | view hierarchy | view users | administrator

[edit organization profile](#) [add service package](#) [view request history](#)
[view pending requests](#)

The following is the list of services currently granted to this organization. The service packages are organized by category. To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen. = uses site codes

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	<input checked="" type="checkbox"/> Active	2001.10.07 EDT
Covisint Supplied Services			
Supplier Connection	more info	<input type="checkbox"/> Suspended	2001.10.07 EDT

7. 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 service 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 users in the organization.

To suspend an active package, click on the suspend button. A suspended package may then be permanently removed. To Permanently Remove a suspended package, click on the Permanently Remove button. *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	

service package information	
description	Library Services - GSS
owner organization	Covisint

8. Click **permanently remove organization's grant for service package**.
9. Key in the *reason for removing the service package* in the open text box.
10. 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)

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



You are able to grant a divisions request to service packages only for those packages for which you are the Administrator.



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.

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : Search : Administration : Reports : Show side nav

Pending requests User Requests Service Admin abston - Covisint
Organization Requests

organization search result(s):

organization name

organization search result(s):
The results of your search appear below. Click on an organization name to view details. Scroll down to enter new search criteria or click **help** for Search Tips.

search results
You searched for: Found: 102 results



Status	View Hierarchy	Organization Name	Address
<input checked="" type="checkbox"/>		A Materials Co.	123 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AA Materials Co.	124 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		AAA Materials Co.	150 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BB Materials Co.	125 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		BBB Materials Co.	151 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		CC Materials Co.	126 Main St., Toledo, OH 12345
<input checked="" type="checkbox"/>		CCC Materials Co.	152 Main St., Toledo, OH 12345

service package request

approve	reject	service package name	request reason	rejection reason*
<input type="radio"/>	<input type="radio"/>	Covisint Teamroom	training	<input type="text"/>

The text entered in the *reject* field becomes part of this division's permanent record, and is viewable by other Administrators in your company.

Perform one or more of the following:

If you wish to...	Then...
approve the division's access request to a service package	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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 other Administrators in your company. 5. Click submit decision. 6. Click OK to confirm.

Generating Reports

Reports Overview

The Reports options allow a Service Administrator to view CCA real-time reports, customized for that role. Within the reports options Administrators can view the following reports:

- * Service Owner Reports
- * Inactivity Report
- * User Audits

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

Service Owner Administrator Reports

Service Owner > Summary Report

The Service Owner Summary report allows you to gather information about the numbers of users and organizations who have been granted service packages for which you are the administrator. You can select a service package to narrow your results. The report displays the total user count, total Covisint organization count, and total unique parent supplier code count

Service Owner > User Detail Report

The Service Owner User Detail report allows you to gather information about the numbers and identities of users who have been granted various service packages. If desired, you may narrow search results by specifying a user location code for the selected service package. This report displays the user contact information for the selected service package.

Service Owner > Administrator Details Report

The Administrator Detail report provides the Service Owner Administrator with a list of supplier administrators who have the ability to grant user's access to their service. This report displays the Organization's name, parent supplier code, and administrator name and contact information.

Service Owner > Inactivity Report

The Administrator Inactivity report provides the Service Owner Administrator with a list of users that have not accessed the service package nor any of its subpackages in over 90 days. If the Service package policy mandates that users who have not accessed the portal for over 90 days must have their access inactivated, this can be completed at this screen.

Quarterly User Audits

A quarterly audit reminder will be emailed to certain 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 certain 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.

Service Owner > Summary Report

Complete the following steps to generate the Service Owner Summary report.

1. Click **Service Owner Reports** from the Reports drop down menu. .

The screenshot shows the 'Covisint Connection and Administration' web application. The top navigation bar includes links for Home, Portal, Help, Contact Us, and Logout. Below this, a breadcrumb trail shows 'Home > My Profile > My Organization > Search > Administration > Reports'. The 'Reports' dropdown menu is open, showing options for 'Service Owner Reports', 'Activity Report', and 'Audits'. The 'Service Owner Reports' option is selected. Below the menu, the 'service owners reports' section is visible, with tabs for 'summary report', 'user details report', 'administrator details report', and 'Org T's and C's Report'. The 'summary report' tab is active. Under the 'Report Criteria' section, there is a 'select a service package' dropdown menu set to 'All Service Packages'. Below this, there are two radio buttons for 'results': 'show as HTML' (selected) and 'show as a .csv file'. At the bottom, there is an 'initiate report' button labeled 'submit'.

2. Click **Summary Report** tab.
3. Select the service package in the service package drop-down menu, if desired.
4. Enable the radio button to indicate how you wish to view the results, either HTML or as a .CSV file.
5. Click **submit**. The report displays the total user count, total Covisint organization count, and total unique parent supplier code count for a given service package.

Result
You have successfully generated a summary report.

Service Owner > User Detail Report

Complete the following steps to generate the Service Owner User Detail report.

1. Click **Service Owner Reports** from the Reports drop down menu. .

Home : My Profile : My Organization : Search : Administration : **Reports** : Show side nav

Jane Doe - One Stop Shop Manufacturing (DEMO)

service owners reports

summary report **user details report** administrator details report Org T's and C's Report

Report Criteria

select a service package Emerging Energy

enter user location code

results ☒ show as HTML ☐ show as a .csv file

initiate report submit

2. Click **user details report** tab.
3. Select the service package in the service package drop-down menu, if desired.
4. Optionally, you may narrow the results by identifying the User Location code.
5. Enable the radio button to indicate how you wish to view the results, either HTML or as a .CSV file.
6. Click **submit**. The results display a list of users for a selected application package.

Home : My Profile : My Organization : Search : Administration : **Reports** : Show side nav

Jane Doe - One Stop Shop Manufacturing (DEMO)

service owners reports

summary report **user details report** administrator details report Org T's and C's Report

Report for Application Package: Check For My Checks

2007.02.13 09:38:05 EST

User SSO Id	Last Name	First Name	Email Address	User Location Code	Company/Division Name
absc001	Doe	Julie	julie.doe@yahoo.com	002	Covisint

Viewing 1 - 2 of 2 Show 50 per page

Report Criteria

select a service package > Check For My Checks

enter user location code Emerging Energy

results ☒ show as HTML ☐ show as a .csv file

initiate report submit

> Check For My Checks

> Check For My Checks

> Demo test package Chevron

> Diet Dew

> Nuts and Bolts

> Test Package

> The Brand New Application Package

Result

You have successfully generated a Service Owner User Detail report.

Administrator Details Report

The Administrator Details Summary report provides the Service Owner Administrator with a list of supplier administrators by type, who have the ability to grant user's access to their service. This report displays the Organization's name, parent supplier code, and administrator name and contact information.

Complete the following steps to generate an Administrator Details Report.

1. Click **Service Owner Reports** from the Reports drop down menu. .

The screenshot shows the 'service owners reports' section of the CCA Service Administrator interface. The 'administrator details report' tab is selected. The form includes the following fields and controls:

- Report Criteria**
 - select a service package:** A dropdown menu with 'Emerging Energy' selected.
 - enter a parent supplier code:** A text input field.
 - enter administration type:** A dropdown menu with 'All' selected.
 - results:** Two radio buttons: 'show as HTML' (selected) and 'show as a .csv file'.
 - initiate report:** A 'submit' button.

2. Click **administrator details** report tab.
3. Select the *service package* in the drop-down menu.
4. Optionally, you may narrow the results by identifying the *parent supplier code*.
5. Select the *type of administrator* you wish to view in the drop down menu.
6. Enable the radio button to indicate how you wish to view the results, either HTML or as a .CSV file.
7. Click **submit**. The report displays the Organization's name, parent supplier code, and administrator name and contact information for a given service package.

Home : My Profile : My Organization : Search : Administration : **Reports** : Show side nav

Jane Doe - One Stop Shop Manufacturing (DEMO)

service owners reports

summary report user details report administrator details report Org T's and C's Report

Report for Application Package: Emerging Energy

2007.02.13 09:49:26 EST

CCA Org Name	Parent Supplier Code	Last Name	First Name	Administrator SSO Id	Email Address	Phone Number
Covisint	COV001	Doe	Jack	JACKDOEADMIN	jack.doe@yahoo.com	313.227.7300
One Stop Shop Manufacturing (DEMO)	G5N4W5	Doe	Jane	JANEDOESERVICEADMIN	jdoe@yahoo.com	313.227.7300

CCA Org Name Parent Supplier Code Last Name First Name Administrator SSO Id Email Address Phone Number

Viewing 1 - 2 of 2 Show 50 per page

The administrator details report is designed to provide the service owner with a list of supplier administrators who have the ability to grant user's access to their service. This report may be useful for sending communications to these administrators.

The report may be broken out by administrator type. The security administrator has a larger set of administrative privileges than the organization service administrator.

To locate the administrators for a single parent supplier code, please enter the full parent supplier code. Although the code is not case sensitive, the search will otherwise look for an exact match of the code entered.

Report Criteria

select a service package: Emerging Energy

enter a parent supplier code:

enter administration type: Organization Service Admin

results: ☒ show as HTML ☐ show as a .csv file

initiate report:

Result

You have successfully generated an administrator details report.

Service Owner > Inactivity Report

Complete the following steps to generate the Administrator Inactivity report.

1. Click **Inactivity Report** from the Reports drop down menu.

Home : My Profile : My Organization : Search : Administration : **Reports** : Show side nav

Jane Doe - One Stop Shop Manufacturing (DEMO)

Inactivity Report for: Emerging Energy

The following users have not accessed the Emerging Energy Package nor any of its subpackages in over 90 days. Emerging Energy policy mandates that users who have not accessed the portal for over 90 days must have their access inactivated. Please note that you have the following options:

- Users who no longer need Emerging Energy access can have the service revoked by clicking the "revoke access" check box.
- Users who no longer need access to **any** Covisint services can be suspended and permanently removed by clicking on the user name and accessing the user profile.

show as a .csv file **Warning!** You should change the sort order prior to making your selections. Changing the sort order will deselect your decisions.

user inactivity report sort by ▼

organization name	user name	date since last Emerging Energy access	no action	revoke Emerging Energy access	reactivate Emerging Energy access
Covisint	Day, Sunny	2006.07.26 EDT	<input type="radio"/>	<input type="radio"/>	
Low Carb Tool & Die	Defects, Lester	2006.03.02 EST	<input type="radio"/>	<input type="radio"/>	
Covisint	Doe, Jane	2006.08.15 EDT	<input type="radio"/>	<input type="radio"/>	

organization name user name date since last Emerging Energy access no action revoke Emerging Energy access reactivate Emerging Energy access

2. View the list of users to identify those whom have not accessed the service package nor any of its subpackages in over 90 days. If the Service package policy mandates that users who have not accessed the portal for over 90 days must render their access inactivated/.
3. If the Service package policy mandates that users who have not accessed the portal for over 90 days must render their access inactivated, enable the 'revoke access' radio button for each user that has not accessed the service package.
4. Click **continue**.
5. Click **submit decision**. Access to the service package is revoked from the identified users.

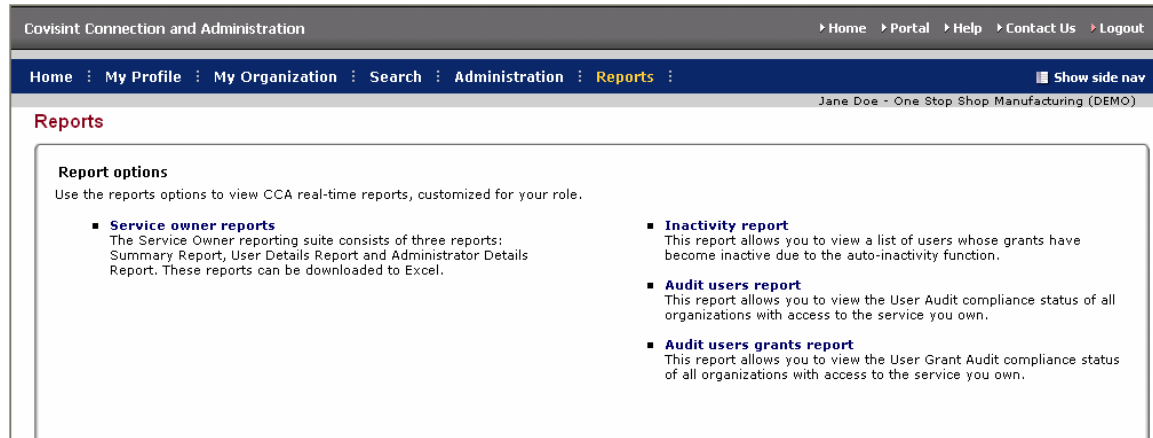
Result

You have successfully generated an inactivity report.

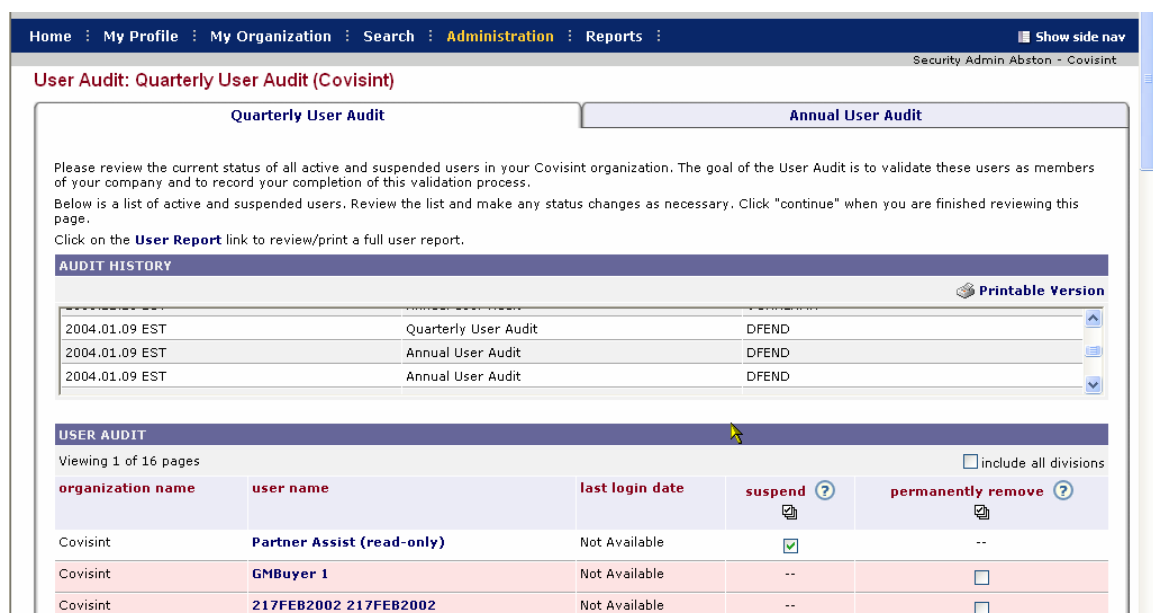
Performing Quarterly User Audits

Some of Covisint's portal partners require certain Administrators to perform a periodic audit of their users. A quarterly audit reminder will be emailed to certain 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:



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



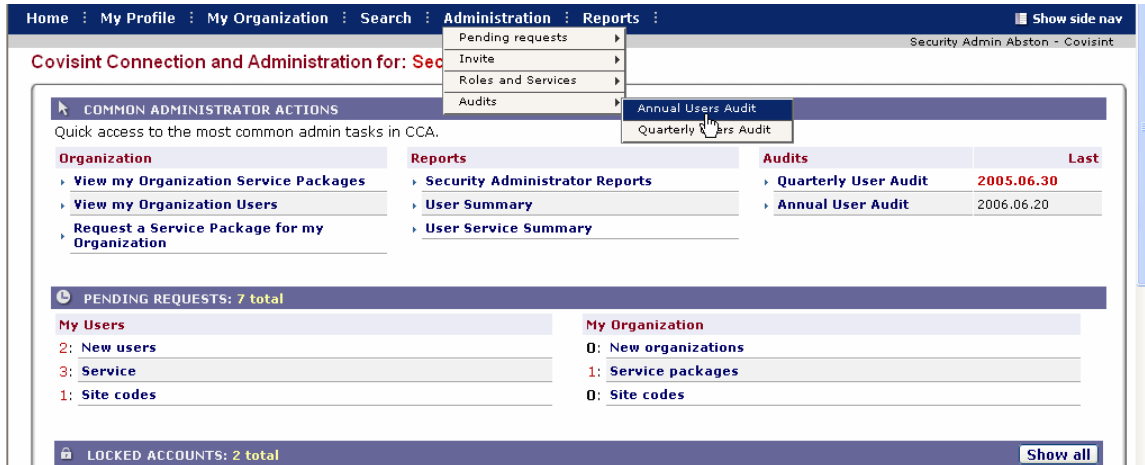
3. Review the list of all users in the administrator's organization that is displayed. (Note: Enabling the include all divisions check box will enable you to audit all organizations at your level or below on your company's hierarchy tree).
4. Enable the checkbox in the *Suspend* or *Permanently Remove* column of each user on the list that you wish to suspend or remove. (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

Some of Covisint's portal partners require Administrators to perform a periodic audit of their users' grants. An annual User Grant audit reminder will be emailed to certain 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.

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



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

Covisint Connection and Administration Home Portal Help Contact Us Logout

Home : My Profile : My Organization : Search : **Administration** : Reports : Show side nav

Security Admin Abston - Covisint

User Audit: Annual User Grant Audit (Covisint)

Quarterly User Audit
Annual User Audit

It is strongly suggested that you **perform a User Audit to suspend or remove users** before reviewing the User Grants.

Conduct your annual user grant audit from this screen. Once you have audited any service package, click on the Confirm and Log Audit Completion button below to log your compliance with the annual audit requirement.

AUDIT HISTORY Printable Version

date of last user audit	Quarterly Audit Type	last user audit administrator ID
2003.06.17 EDT	Quarterly User Audit	ADMINJANEDOE
2003.07.07 EDT	Quarterly User Audit	JOHNDOEADMIN

USER GRANTS

Click on a package or sub-package title below to view the user grants. Note that you must log your compliance using the button at the bottom of this page in order to complete your audit. Download a .csv file containing all packages, users, and grants for offline review.

service package name	Last Confirmed ?
Quality	
Problem Solver	2001.10.07 EDT
Covisint Advanced Quality Planner	2006.11.02 EST
GCAC Portal (Members Only)	2003.02.19 EST
One Stop Shop Portal (DEMO)	2005.03.03 EST
Demo	
... jschonme-test-03	2006.02.09 EST
Finance	
... Check For My Checks	2005.03.07 EST

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

Home : My Profile : My Organization : Search : **Administration** : Reports : Show side nav

Security Admin Abston - Covisint

Annual User Grant Audit (Covisint)

Quarterly User Audit
Annual User Audit

Package/Subpackage: One Stop Shop Portal (DEMO)

Please review the current status of all active and suspended 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 validation process.

USER AUDIT

Viewing 1 of 1 pages ☐ include all divisions

organization name	user name	date granted/updated	Last Access Date	permanently remove ?
Covisint	217FEB2002 217FEB2002	2006.09.12 EDT	2006.09.12 EDT	<input type="checkbox"/>
Covisint	Jane Doe	2006.06.22 EDT	2006.06.22 EDT	<input type="checkbox"/>
Covisint	John Doe	2007.02.05 EST	2007.02.05 EST	<input type="checkbox"/>
Covisint		2006.11.03 EST	2006.11.03 EST	<input type="checkbox"/>
Covisint	EXCHNGOP1 fn EXCHNGOP1 In	2007.01.19 EST	2007.01.19 EST	<input type="checkbox"/>

continue to next step
cancel

- 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. 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.

Appendix A

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

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.

Covisint Connection and Administration

Home Portal Help Contact Us Logout

Home My Profile My Organization Search Administration Reports Show side nav

view service packages for: One Stop Shop Manufacturing (DEMO)

view profile view service packages view hierarchy view users administrator

edit organization profile view request history view pending requests

The following is the list of services currently granted to this organization. The service packages are organized by category. To view service package details, click on the service package name. You may suspend / remove a service from the organization from the details screen.

service package name more info status date granted

service package name	more info	status	date granted
Administration			
Covisint (required)	more info	Active	2004.04.29 EST
Partner Portals			
One Stop Shop Portal	more info	Active	2004.05.04 EST

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- 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 Logout

Home My Profile My Organization Search Administration Reports Show side nav

One Stop Shop Portal details for: One Stop Shop Manufacturing (DEMO)

The following shows all details about this service 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 users in the organization.

To suspend an active package, click on the suspend button. A suspended package may then be permanently removed. To Permanently Remove a suspended package, click on the Permanently Remove button. Note that a permanent removal cannot be undone.

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 GSN4W5

service authority organization (SAO) One Stop Shop Manufacturing (DEMO) request to change SAO

other organizations with same authority designation

One Stop Shop Manufacturing (DEMO)

One Stop Shop Europe -- (top level organization)

site codes view current site codes

inactivity report

description view inactivity report

services included within One Stop Shop Portal

A Service Package may consist of one or many services. The services included in this Service Package are listed below.

- 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.

Need Additional Support?

Contact your [Security Administrator](#) for additional help.

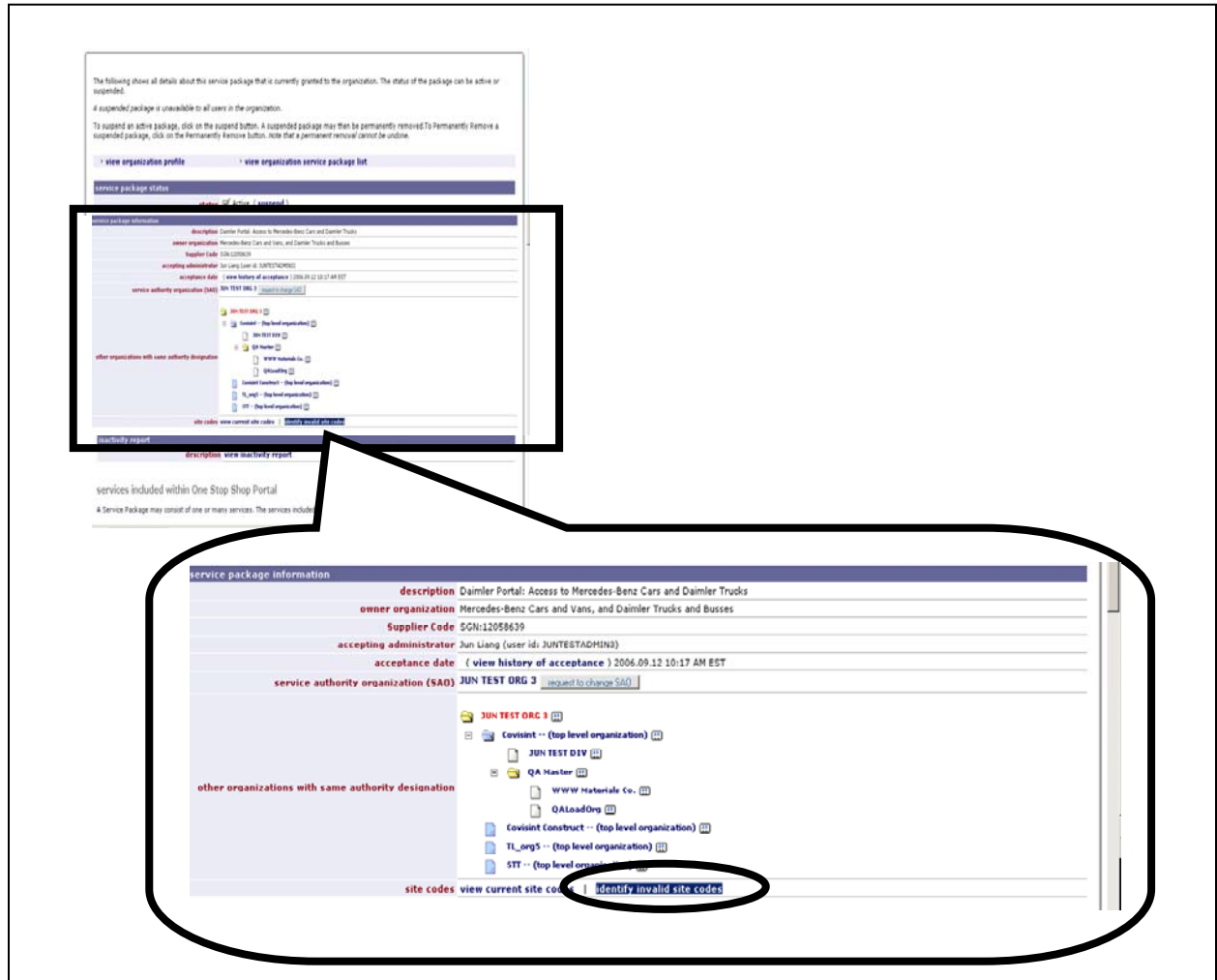
Create a Support Request Ticket

If you are a registered Covisint user, and have questions that are not answered in either of these General User 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

Home : My Profile : My Organization : Search : Administration : Reports : Show side nav

Jun Liang - Daimler AG

Identify Invalid Codes for JUN TEST ORG 3

The following list of site codes are invalid. Click the "remove" button to remove them.

12 users will be affected because they either have an invalid Site Code for Daimler Portal: Access to Mercedes-Benz Cars and Daimler Trucks or have invalid site codes granted for its sub-packages.

site codes	business unit	description	street address	town or city	state	postal code	country code
99001053 A	No Business Unit	99001053 A	covisint test	Covisint city		12345	
99001053 C	No Business Unit	99001053 C	covisint test	Covisint city		12345	
99001053 E	No Business Unit	99001053 E	covisint test	Covisint city		12345	

[remove](#) [cancel](#)

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.