<mark>Using This Help Section</mark>

- **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

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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

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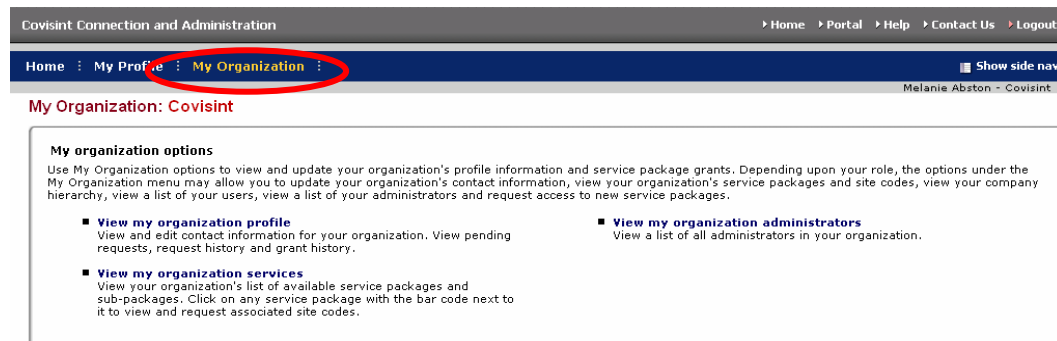
2. Click **View my organization administrators**. A list of all Security Administrators for your organization is displayed.

> 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:	☑ Active
User ID:	MABSTONSTG
Company/Division Name:	Covisint
Prefix:	(Mr., Mrs., Ms., Miss)
*First Name:	Melanie
Middle Name:	
*Last Name:	Abston
Job Title:	
*Address 1:	1 Campus Martius
Address 2:	
Address 3:	
*City/Region:	Detroit
*State/Province:	MI
*Postal Code:	48226
*Country:	UNITED STATES
*Phone Number:	313.227.7300 ⓘ
Mobile Phone Number:	
Fax Number:	
*Email Address:	mabston@covisint.com
Wireless Email Address:	ⓘ
*Time Zone:	(GMT-05:00) Eastern Time (US & Canada)
*Language Preference:	English
*Challenge Question:	Dog's name
*Challenge Answer:	Coco Chanel

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.

Note: In case you forget your password, you will be asked to answer a challenge question based on what you input in the t box above. **Examples:** What is my Mother's Maiden Name? What was the name of my high school? There is a 255 characte on the question and the answer. Both the question and the answer will be accessible to your Security Administrator.

Note: To reset a forgotten password, your answer must match *exactly* what you input into the text box above. The answer case and punctuation sensitive. Both the question and the answer will be accessible to your Security Administrator.

save changes   undo changes   cancel

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

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

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

Result
You have successfully modified your user profile.

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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.

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.**

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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.

![i] 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

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	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 *package name*.
View user roles assigned to you	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	1. Click **My Profile** menu.

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If you wish to…	Then…
	2. Click **View my profile option**.
	3. Click **View pending requests**. The View pending request screen is displayed. From this screen, you are able to view packages and sub packages to which you currently have access request pending.
Send a reminder to the administrator regarding a pending request	1. Click **My Profile** menu.
	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.
Cancel a pending request	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.
Opt out of auto-generated email	**(The system automatically sends email notifications for many items. You may**

If you wish to…	Then…
	opt out of certain email notification by following the steps provided here) 1. Click **My Profile** menu. 2. Click **View my profile option**. 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.
View the history of your requests	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
You have successfully performed additional profile management options.

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.

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

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.
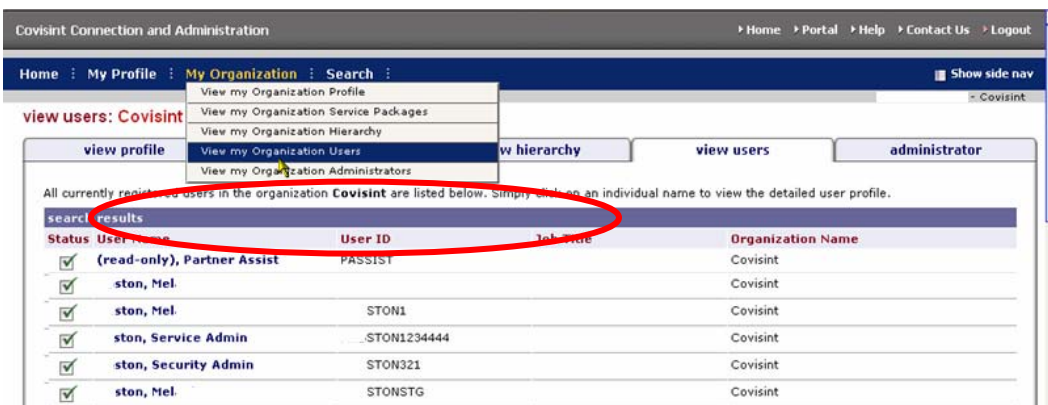
 User Status Icons Defined:

    ✓ = 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.

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.

  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.

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.

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

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

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

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

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

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

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.

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.

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

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

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

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

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

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

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

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	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

1. Perform one or more of the following:

If you wish to…	Then…
View the current service packages to which your organization subscribes	a. Click **View my Organization Profile** from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization. b. Click **view service packages** tab. The View service packages screen is displayed. From this screen, you are able to view packages and sub packages to which your organization currently has access. To view details of any service package grant, simply click the package name.
view the current hierarchy of your organization within	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	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	a. Click **View my Organization Profile** from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization. b. Click **view user** tab. All users registered in the organization are displayed.
view users in a particular division of your organization	a. Click **View my Organization Profile** from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization. b. Click **view hierarchy** tab. c. Click on the name of the division. d. Click **view user** tab. All users registered in the selected division are displayed.
view all administrators in your organization	a. Click **View my Organization Profile** from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization. b. Click **administrator** tab. All administrators in your organization are displayed.
view administrators in a particular division of your organization	a. Click **View my Organization Profile** from the My Organization drop down menu. The View Profile tab is displayed. This tab provides a detailed view of the parent level of your organization. b. Click **view hierarchy** tab. c. Click on the *name of the division*. d. Click **administrator** tab. All users registered in the selected division are displayed.

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

Perform one or more of the following

If you wish to…	Then…
Request a service package	1. Click **Request a Service Package for my Organization** from the My Organization drop down menu. The Request Screen is displayed. A list of all service packages are displayed. 2. Click **request**. 3. Key in the reason for the request in the open text box. 4. Click **continue**. This request for service package is submitted to the approving administrator.
Request a sub-package of a service package (The package must be granted to the organization before the sub-package can be requested or granted).	1. 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. For details on pending requests for organizations, refer to the section entitled "Who Approves an Organization Request?"

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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

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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.
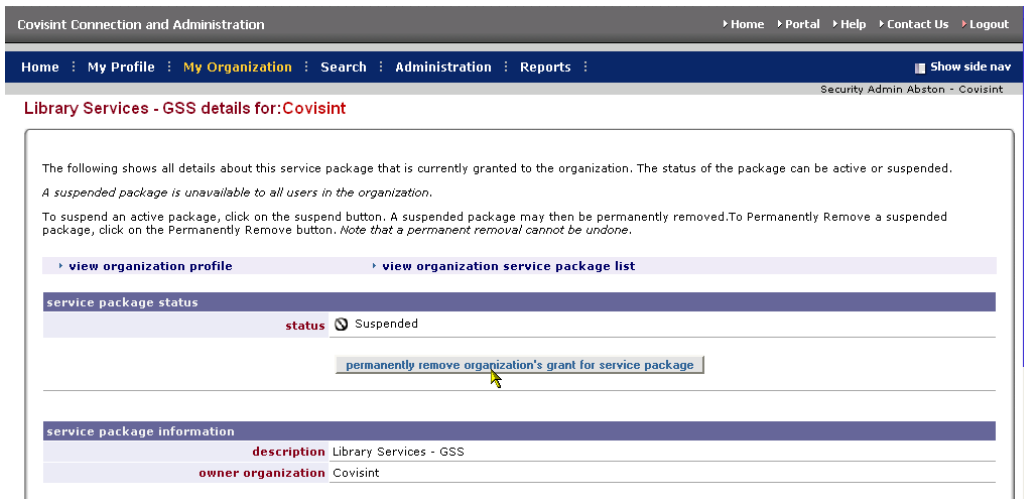

2. Click on the *name of the service package* you wish to suspend. The Details Screen for that service package is displayed.

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.

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.

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If you wish to…	Then…
edit your organization profile	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

1. Perform one or more of the following

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

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

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.

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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.

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.

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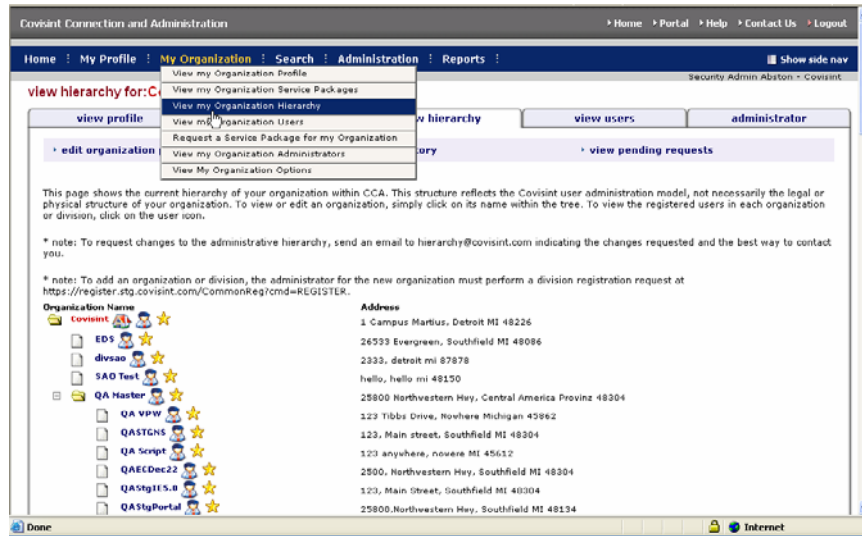
1. Click **View my Organization Hierarchy** from the My Organization drop down menu. The View Hierarchy screen is displayed.

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

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

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

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.

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

5. Click **view service packages** tab.

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

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.

3. Key in search criteria and set filters as desired.

4. Click **Search**. The Search Results screen is displayed.

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

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

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.

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

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. .

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.

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. .

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.

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.

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:
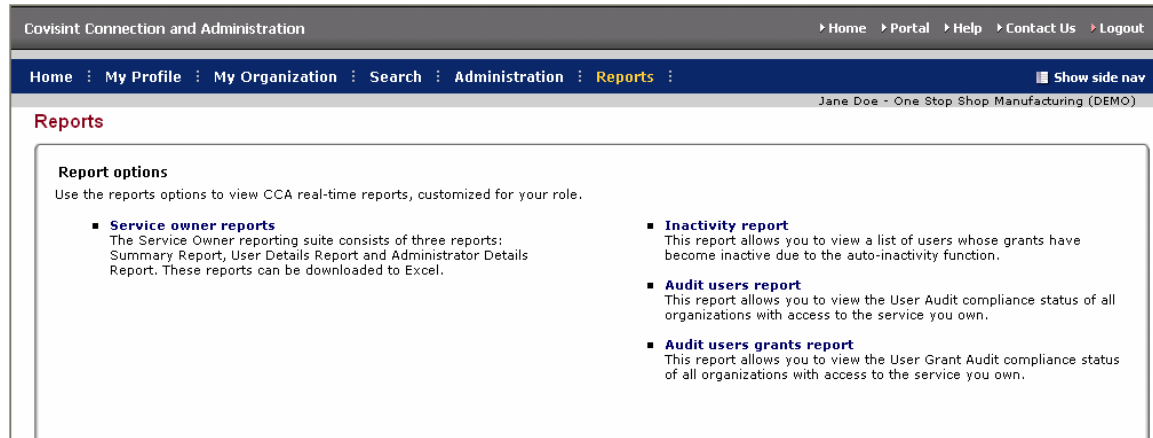
1.   From the Administration menu, click **Audits**.

2.   Click Quarterly User Reports from the Audits drop down menu. The Audit Users screen is displayed.
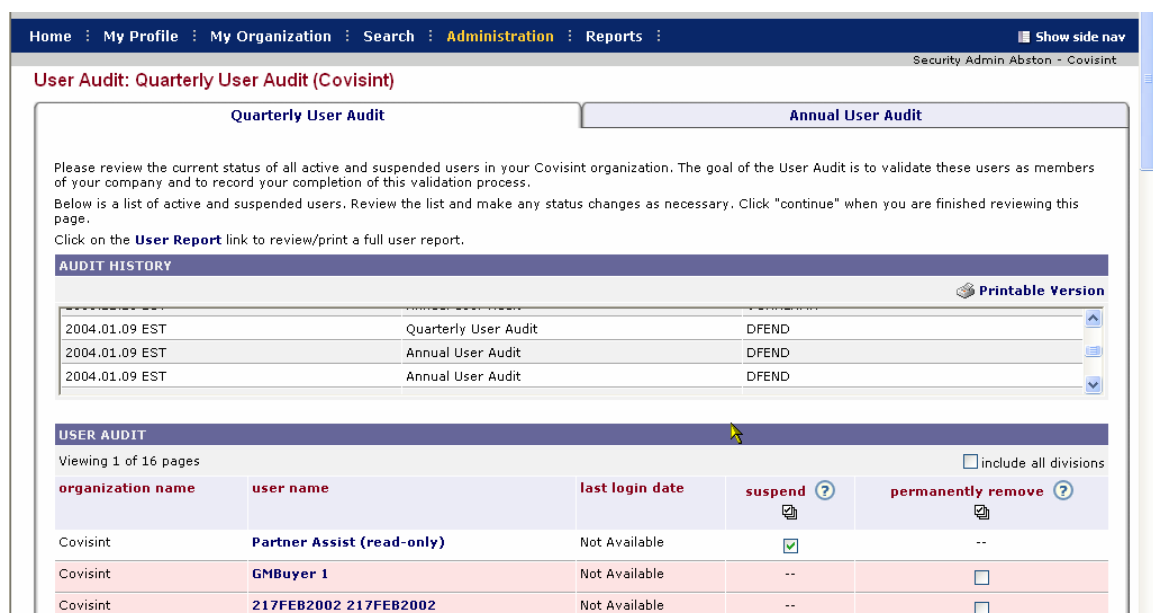
3.   Review the list of all users in the administrator's organization that is displayed. (Note: Enabling the include all divisions check box will enable you to audit all organizations at your level or below on your company's hierarchy tree).

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:
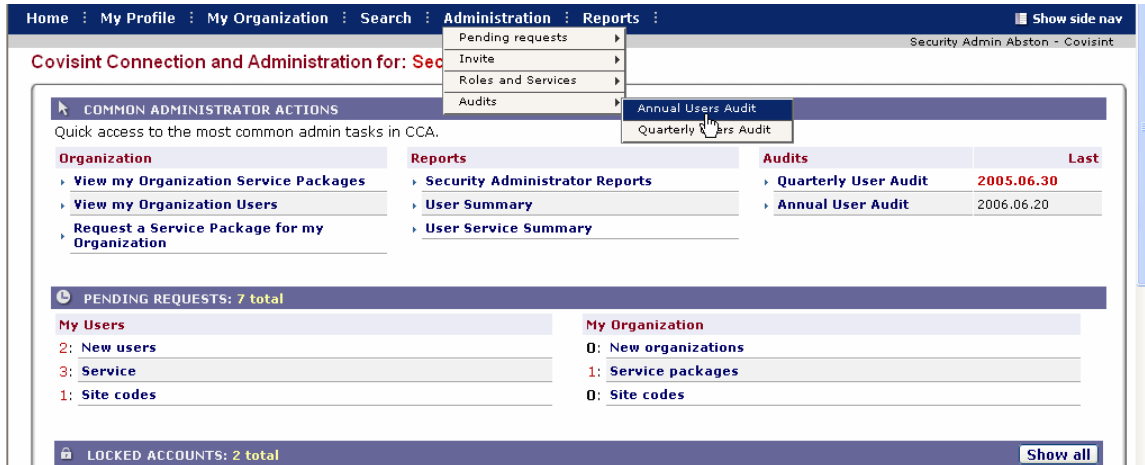
1. From the Administration menu, click **Audits**.

2. Click **Annual User Reports** from the Audits drop down menu. The Annual User Audit screen is displayed.

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

4. Optionally, you can click the **show all divisions** checkbox to conduct the audit for all organizations at or below your organization in your organization's hierarchy.

5.   Enable the checkbox of each service you wish to permanently remove from the targeted user.

6.   Click **continue to next step**.

7.   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.

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

3. Click **request to change SAO**.

4. Select the organization to receive the SAO designation. If there are no organizations listed, it means that no other CCA organization has the same parent supplier code for the portal package selected.

5. Review the change and click **submit**.

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

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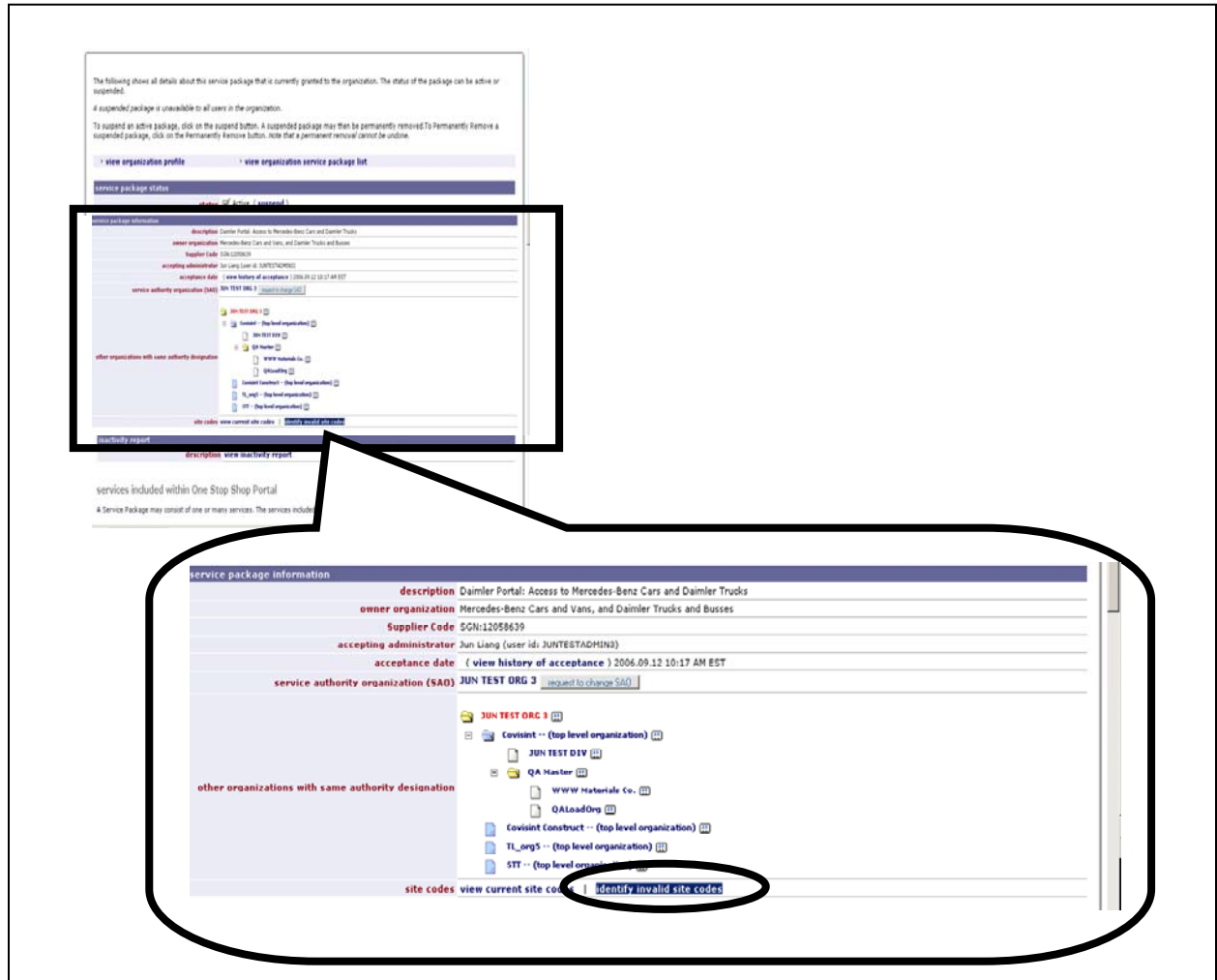
From the Organization Service Packages screen, navigate to the Invalid Site Code screen by clicking **identify invalid site codes**.

Identify Invalid Codes for [SAO Organization] Screen

From this screen, Portal Owners of an SAO Organization are able to view:
- a list of site codes involved in invalid code grants for users and/or organizations in CCA
- the number of users impacted by the invalid site codes granted on their Portal grant or on application grants (sub-packages).

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

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

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