User Administration, User Management

The User Administration function can be separated into three distinct components: User Self Service, User Management, and Account Management. The User Self Service function can be performed by any application user while User and Account Management are performed by the Customer Manager or the Siemens Regional Administrator. The User Management functionality allows the Customer Manager to maintain and manage user profiles within the company and its associated accounts. This Quick Reference Card (QRC) provides the necessary information to access this functionality and to initiate any changes.

User Management

The User Management functionality is accessed from the Application Home Page.

To display the User Management functionality, position your mouse pointer over the administration text and select the Users option from the pop-up menu. The application opens the User Management Page.

<table>
<thead>
<tr>
<th>State</th>
<th>Name</th>
<th>Company</th>
<th>Role</th>
<th>Allowed To Order</th>
<th>Show Customer Prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>2 Cust with Price</td>
<td>Lisyang</td>
<td></td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>☑</td>
<td>5 Cust Mgr Lisyang</td>
<td></td>
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<td>☑</td>
<td>☑</td>
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<tr>
<td>☑</td>
<td>6 Cust Mgr Lisyang</td>
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<td>☑</td>
<td>agent xing</td>
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<td>☑</td>
<td>Agent FA JCA</td>
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</table>
The Users tab includes a list of all the active users associated with your Primary account or the account you have selected. The Unblock Users tab includes a list of users that are inactive, no assigned role, but not deleted. Inactive users can be reactivated at any time.

Just below the tabs in the User Overview you will notice menu options for Add User, Delete User, and More. Positioning your mouse pointer over the More Option displays a pop-up menu with options to Export as an Excel file or Print. The Delete User option is disabled (grayed out) unless a user is selected, in which case you can delete the selected user or users by clicking the Delete User option.

The Add User function allows you to add new users of application.

**Add a New User**

1. From the Users Overview menu bar, click the Add User option. The application opens the Add User function in a separate screen and displays a sequence of steps that must be completed.

   ![Add User Screen](image)


2. From the drop-down control, select a company and click Next. Notice that the Add User Status Bar has moved to Step 2 of the process, User Details.

   ![User Details Screen](image)

   ![User Details Screen](image)

3. Enter the User Details in the required fields (those marked with red asterisk) and click Next. Notice that the Add User Status Bar has moved to Step 3 of the process, System Access.
4. Enter the required System Access information, such as Login and Password, and click **Next**. Notice that the Add User Status Bar has moved to Step 4 of the process, Roles and Rights.

5. Select the User’s roles and rights and click **Finish**. When a role is selected, the application assigns a set of default rights for that role. You can modify any of the rights pre-selected by the application.

When these steps have been completed, a New User has been added to the application.