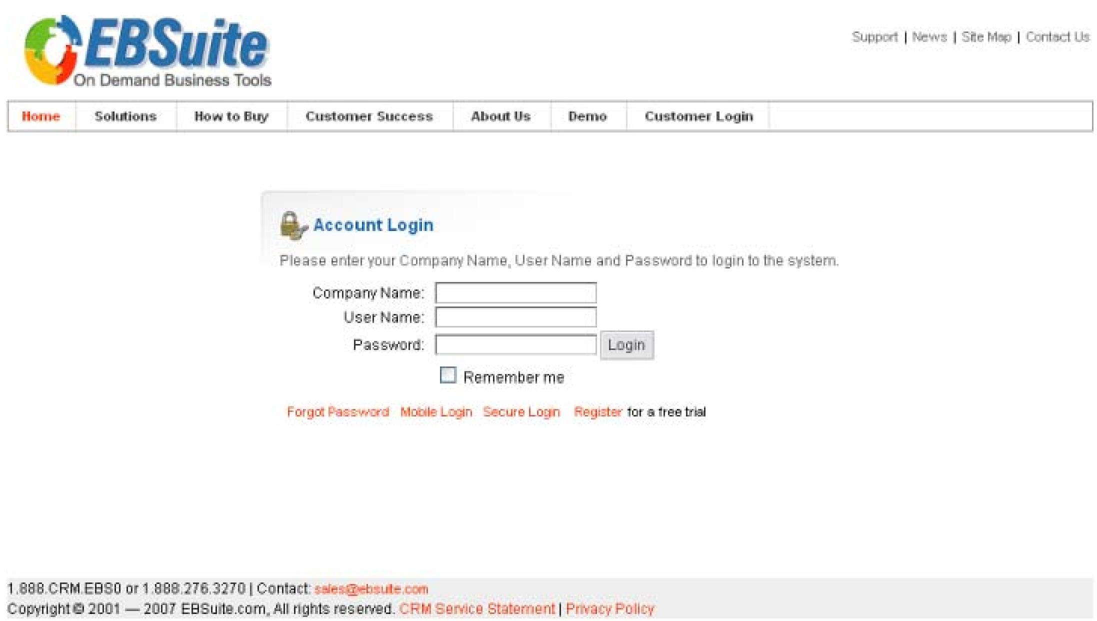
Administrator Training

Logging into the Support Manager

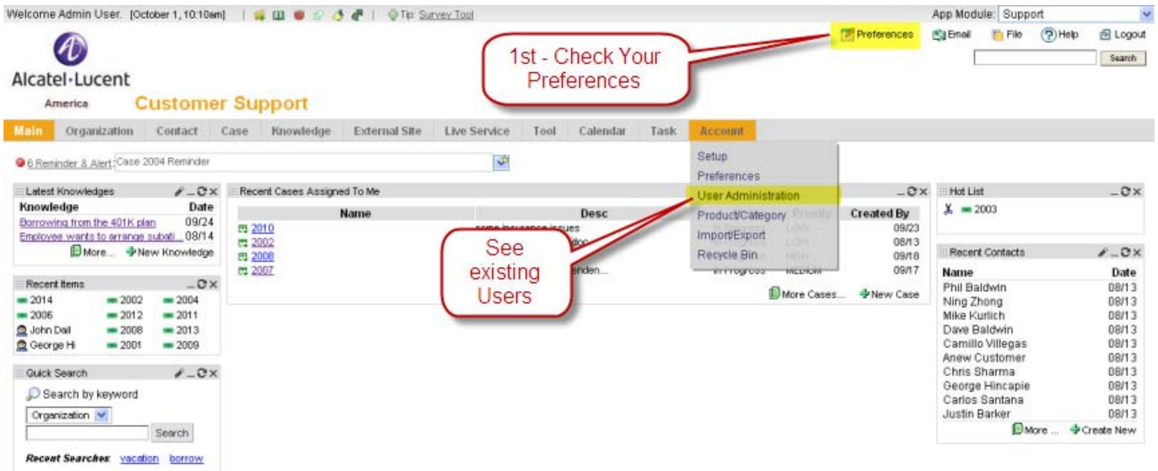
In your browser (preferably you will use Firefox or Internet Explorer) go to:

www.ebsuite.com/iLogin.jsp

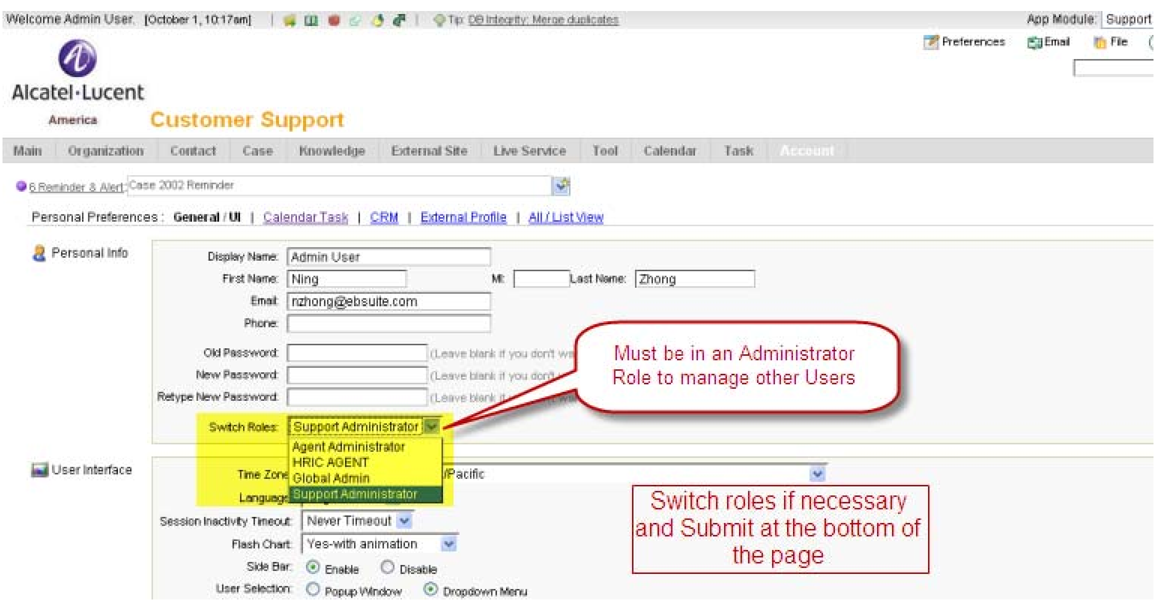


The Administrator Role

All Users will login to the Main Page. As the Admin User, make sure your are in the Administrator Role by checking Preferences. Then review the other Users who have access.

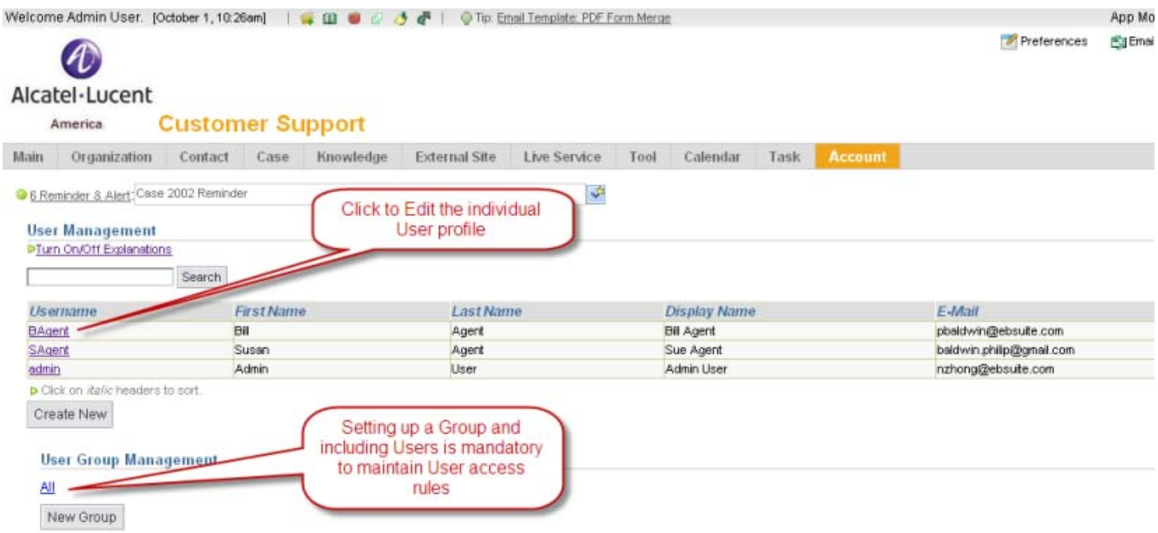


In the Preferences area a User with multiple roles may switch roles.



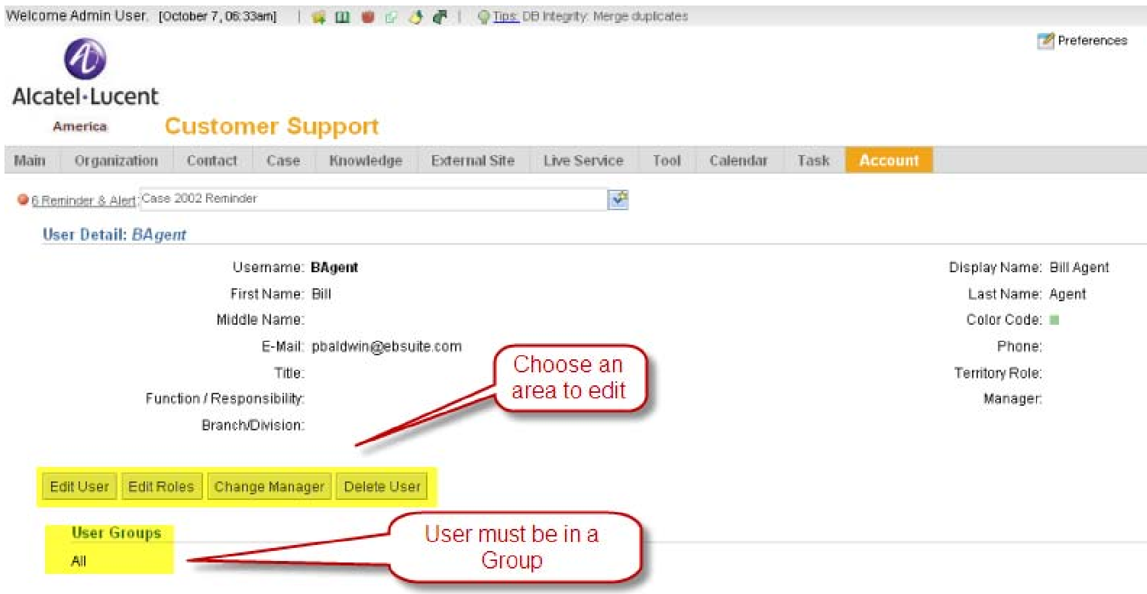
Managing Users

In the Administrative Role the User may manage the application Users (Account > User Administration)



Editing an Existing User

Click the Username to open the User profile (in this example BAgent)



Edit User – all information about the individual user including their login name.
Edit Roles – Important – see Setting User Roles below.
Change Manager – Not used, not administration is required.
Delete User – Important – see Deleting a User below.

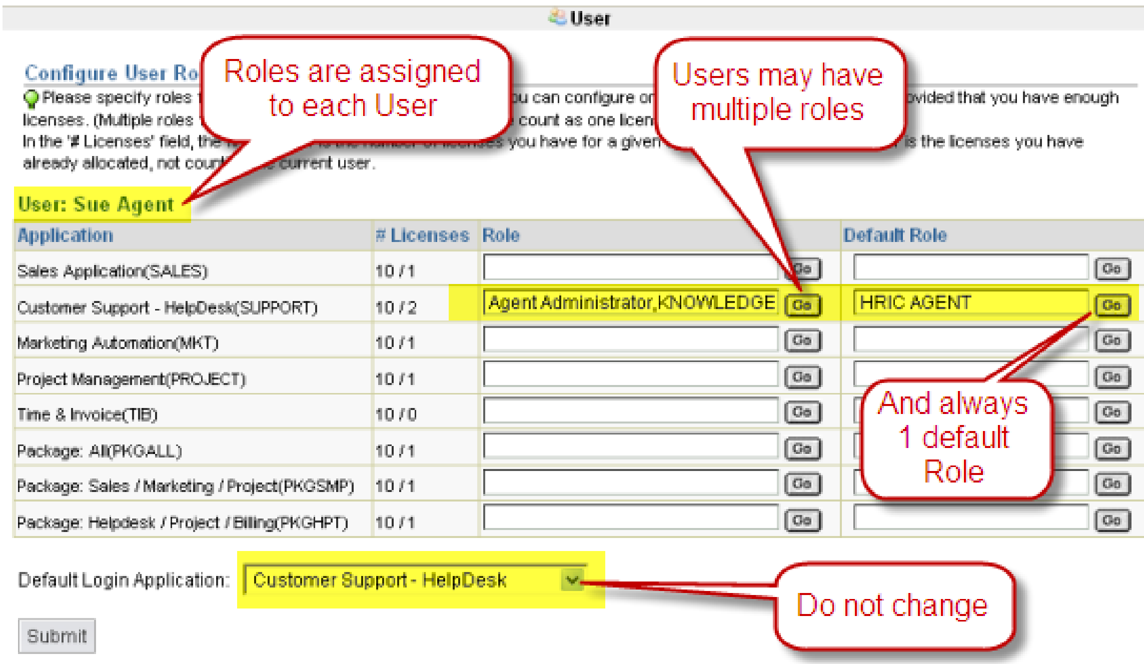
User Passwords

User Passwords are not managed by the Administrator. The User manages their own password in the Preferences area. If they are locked out of the application, they will have to request their password be sent to them at the login screen.

insert picture of login screen

Adding the Roles to a User

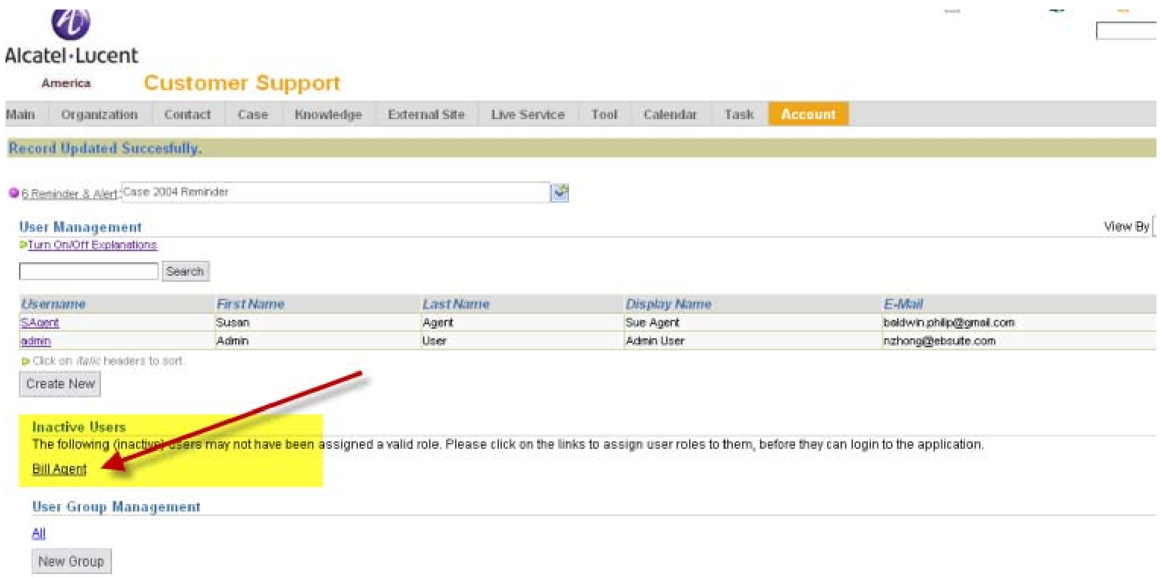
Click on Edit Roles to add a Role for a User. A User may have more than one Role assigned, but must have at least one role assigned before that User may log in. The administrator may also take Roles away from a User, but if no Role is assigned the User will not be able to login.



Deleting a User (Making the User Inactive)

Before a User can be deleted, all of the Roles assigned to the User must be removed. Once the Roles are removed the User cannot login. In the application Users are never truly deleted, they are only made Inactive even though the "Delete User" button implies otherwise.

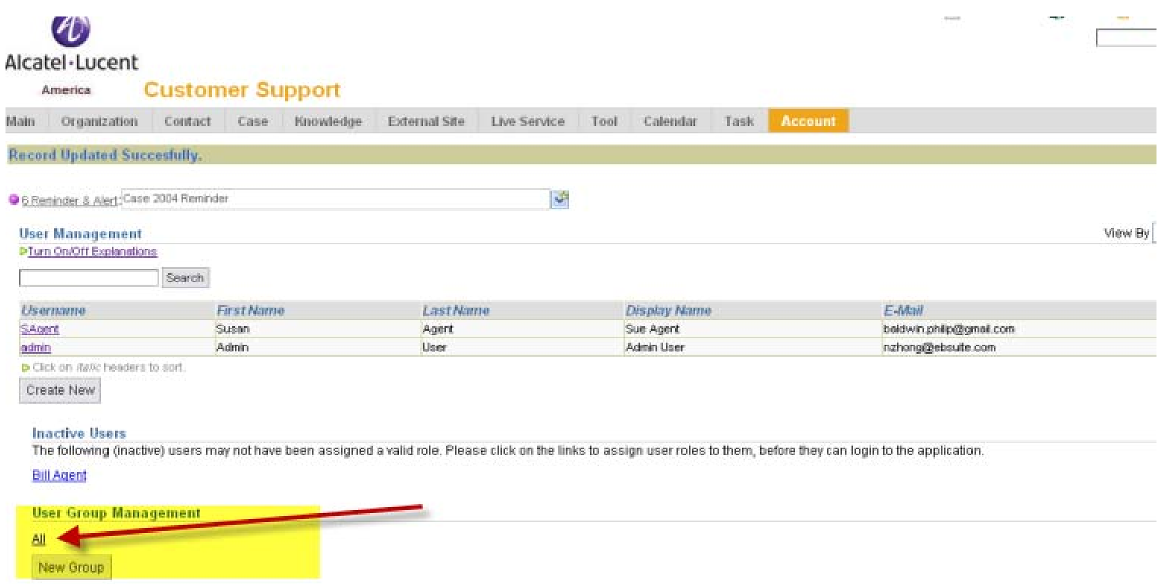
Once a User is stripped of their Roles and the Delete User button is submitted, the User and all pertinent information is moved to the Inactive User area under User Management.



To reverse the process (re-establish a deleted user) simply add a Role back to the Inactive User.

Controlling Case Access (visibility)

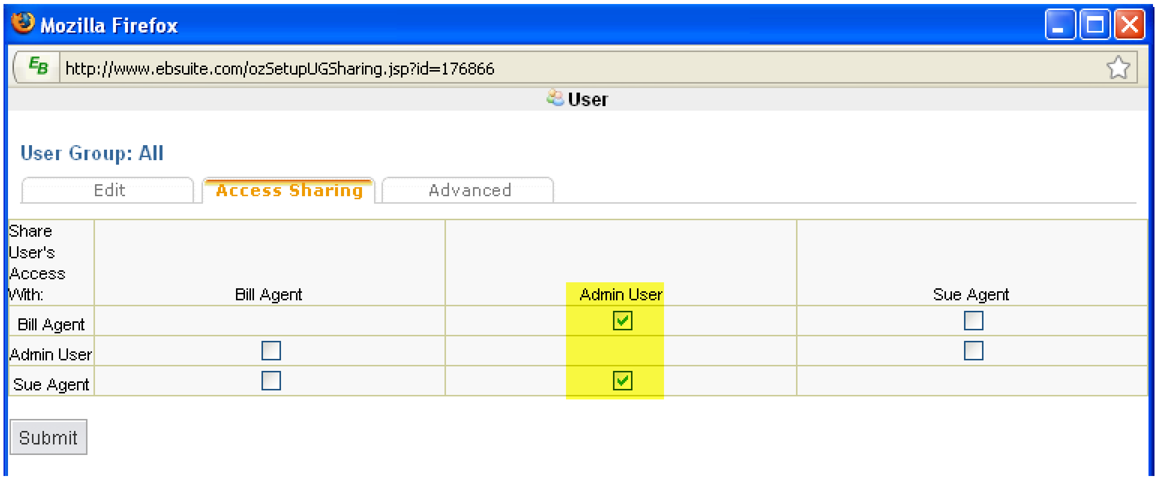
All users must belong to a common group. Under User Management the administrator can see the existing Group



The Group name is: All
Click on the “All” group

The group members are managed under the Edit tab and Access Sharing tab controls (as the name implies) access sharing. Access is the ability of one user to see the Cases of another User.

Notice the Users in the on going example where Sue Agent and Bill Agent are HRSC Agents and Admin is the Administrator with total visibility of all cases.

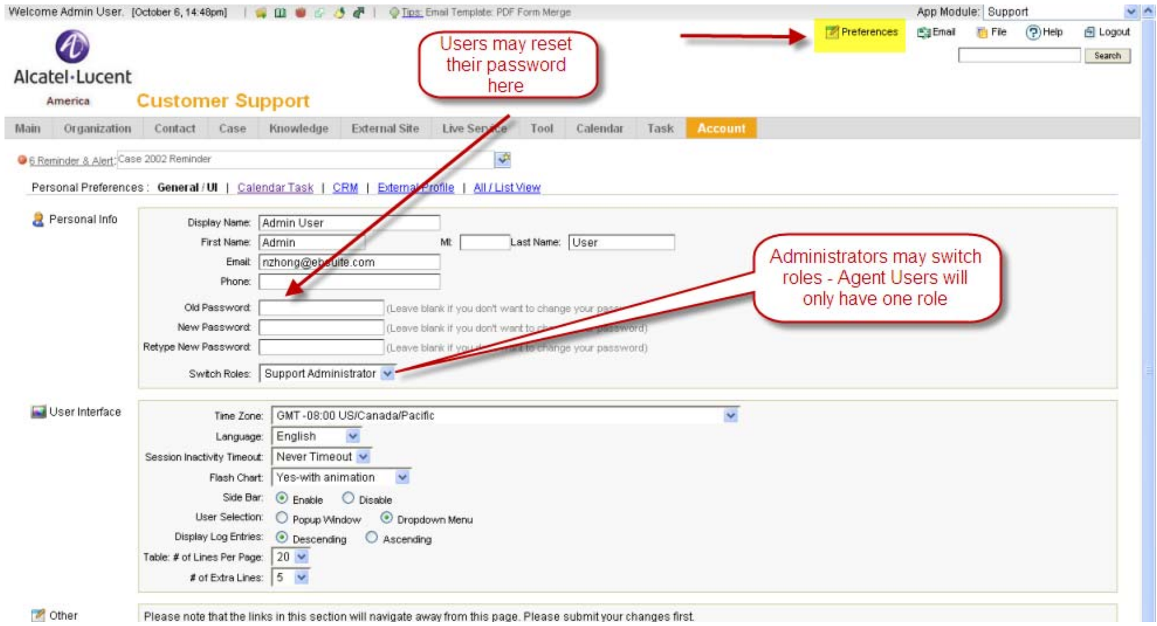


Admin User can see Bill Agent and Sue Agent's respective Cases, but Bill and Sue can only see their own cases.

The Advanced tab can be ignored.

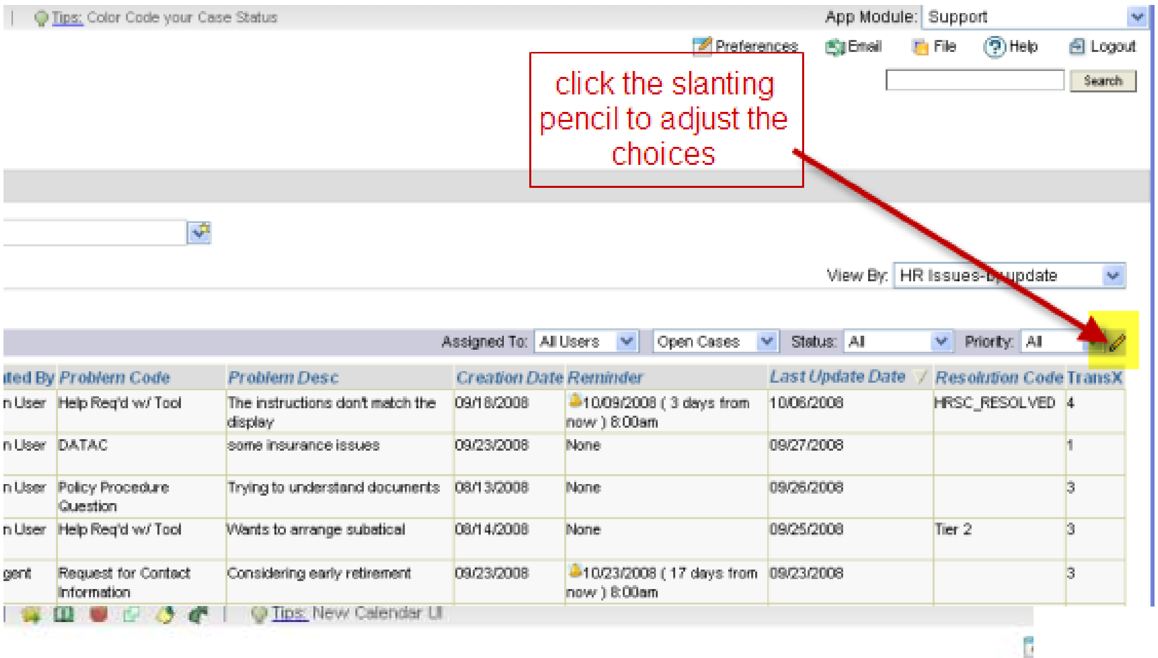
Administrative Access to System Preferences

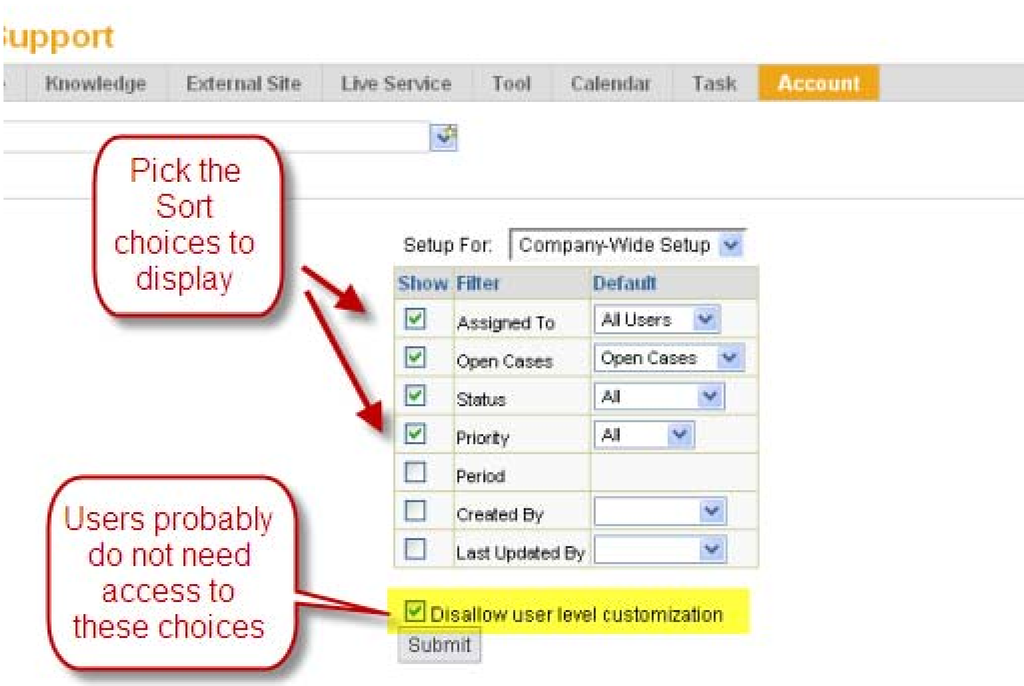
All Users have access to their own local Preferences. In general the Users should be discouraged from making any changes to their Preferences with out a discussion with the Administrator for the site. But, an important feature inside the Preferences is the ability the User has to change their login password. In fact, this is only place User passwords are administered. The site Administrator does not have any utility or tool that enables passwords to be reset. Only the User controls their own password.


Users may reset their password here
Administrators may switch roles - Agent Users will only have one role
Welcome Admin User. [October 6, 14:48pm]
Tips: Email Template: PDF Form Merge
App Module: Support
Preferences
Email
File
Help
Logout
Search
Alcatel·Lucent
America
Customer Support
Main
Organization
Contact
Case
Knowledge
External Site
Live Service
Tool
Calendar
Task
Account
6 Reminder & Alert: Case 2002 Reminder
Personal Preferences : General / UI | Calendar Task | CRM | External Profile | All / List View
Personal Info
Display Name: Admin User
First Name: Admin
MI:
Last Name: User
Phone:
Old Password:
New Password:
Retype New Password:
Switch Roles: Support Administrator
User Interface
Time Zone: GMT -08:00 US/Canada/Pacific
Language: English
Session Inactivity Timeout: Never Timeout
Flash Chart: Yes-with animation
Side Bar: Enable Disable
User Selection: Popup Window Dropdown Menu
Display Log Entries: Descending Ascending
Table: # of Lines Per Page: 20
# of Extra Lines: 5
Other
Please note that the links in this section will navigate away from this page. Please submit your changes first.

Adjusting the personal filter choices

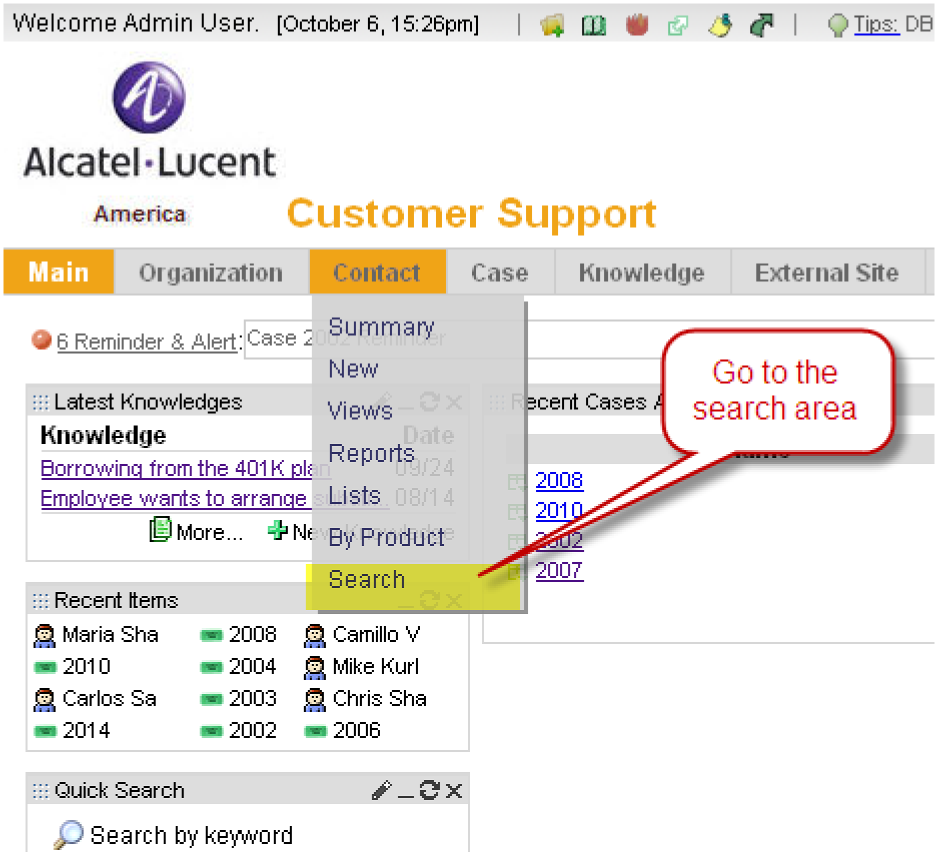
At the top of the Cases tabular display (the table seen after clicking on the Cases tab) look for the “slanting pencil” to adjust the personal filter.



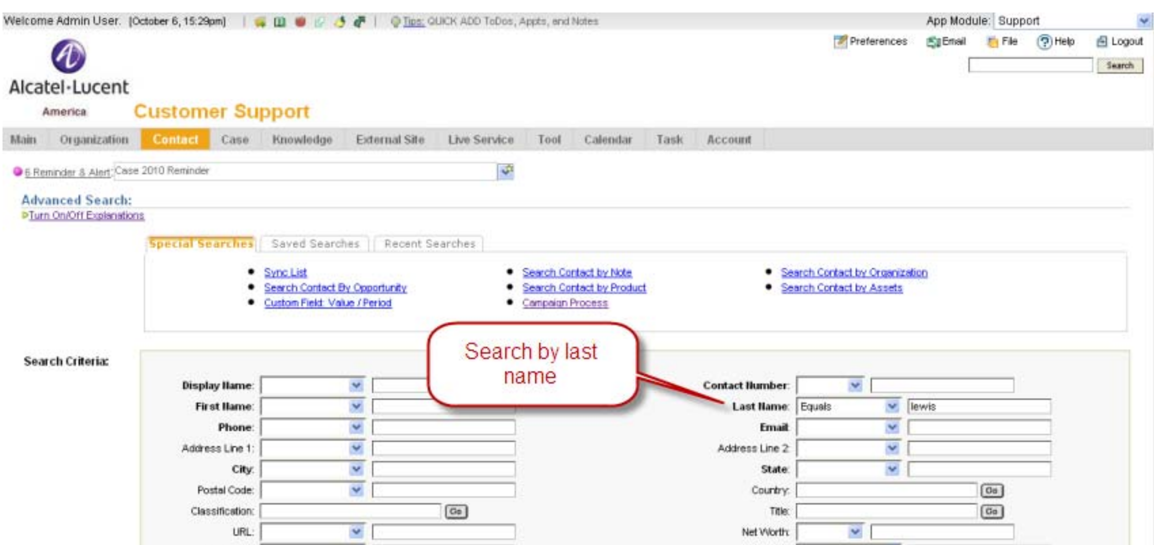


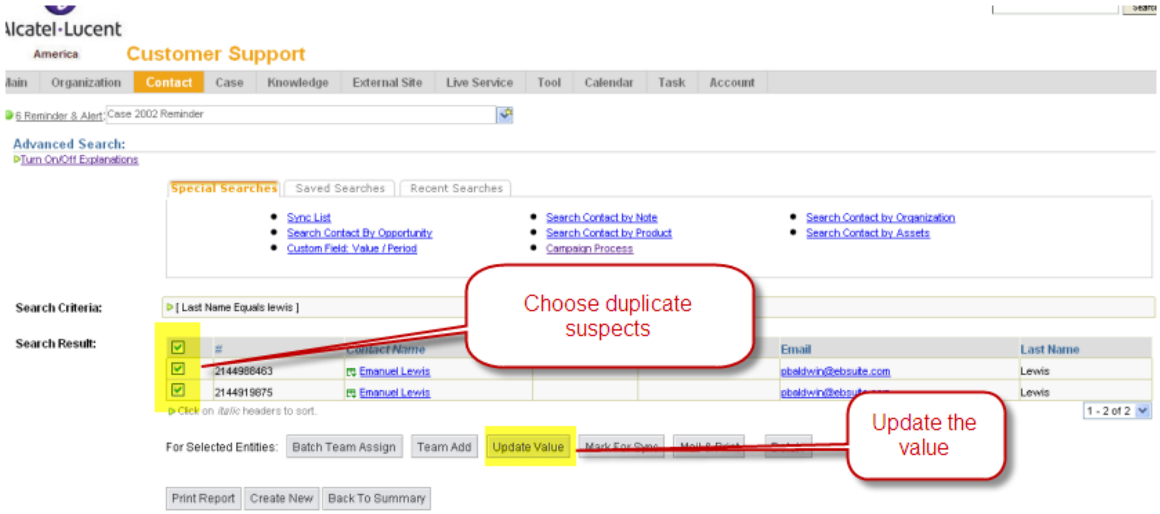
Searching for Duplicate Employees

If it appears that the database has duplicate entries for an Employee record, the administrator can search the database for those duplicates and merge records.

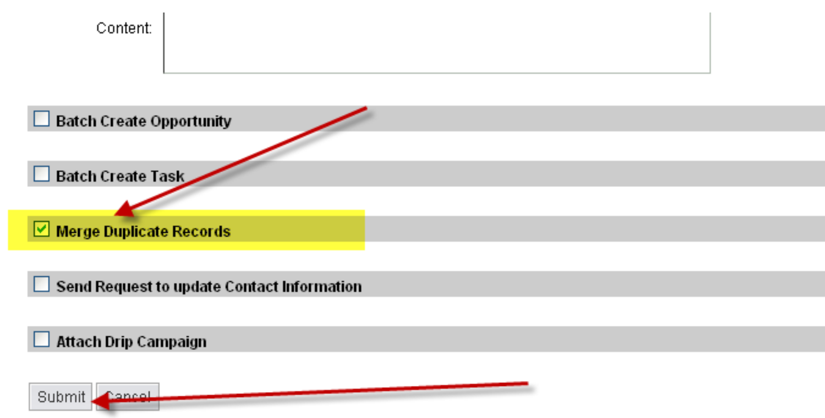


Find the suspected duplicates by searching. Search for example by last name.





After clicking on Update Value, look for "Merge Duplicate Records"



This will merge the data from both records, keeping the most recently updated information.