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How do I Manage Contacts / Users on Infor Xtreme?

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Description:

How to Add/Edit/Disable Contacts on Infor Xtreme?

Resolution:

Managing Contacts on Infor Xtreme

Direct employee users can be added to Infor Xtreme by the company's designated Contact Administrator. In most cases, the current Contact Administrator can be found on a user's profile page. If the Contact Admin cannot be determined, call Infor Support or log a General Request on Xtreme to inquire. To have the current Contact Admin changed or another Contact Admin assigned, open a General Request on Xtreme. (Customers do not have the ability to remove or assign the permission to another user.) The Contact Admin also has the ability to edit and disable existing contacts on Xtreme.

3rd Party Consultants must be authorized by both a direct employee user of the customer and Infor. The 3rd party should contact a direct employee at the customer account and the direct employee should open a General Request on Infor Xtreme requesting that the 3rd party contact be authorized. Customer Care will follow up with the direct employee via Infor Xtreme to authorize the 3rd party.

Using the Contact Administrator Feature to Add/Edit/Disable Contacts:

Infor's "Contact Administrator" utility on Infor Xtreme allows a direct employee from your company to add, edit, and disable users of Infor Xtreme as necessary. With this functionality, you can help ensure that other direct employees of your company have quick access to support, as well as help protect your company's support information from unauthorized users. (Please note that this utility may only be used for direct employees with an email under your company's domain - 3rd party consultants or other users who are not direct employees must be approved via a brief authorization process.)

We hope you will find that the Contact Administrator functionality is convenient and straight-forward. Authorized Contact Admins can hover over the "Administration" link on the second tier of dropdowns on any Infor Xtreme page and select "Manage Contacts" and then "Add/Edit Contact." (Some customers will have an additional option of "Pending Registrations" which is explained below.) Please note that the Administration link is visible to authorized Contact Admins only. Presented will be a list of current and disabled users. To begin, select a user from the list to edit or disable or add a new contact via the Add button at the bottom. When editing a contact, you can correct contact details, reset the password, and/or update the login/email address. (Please remember that contact emails must be business emails under your company's domain.) You may also disable contacts who no longer need access by selecting the "Account Disabled" radio button. Also note that contacts may only be disabled, and not deleted permanently, as they may be linked to older incidents in the system. When disabling a user, the system will prompt you to reassign any open incidents to another user. Even if the user has no open incidents, this step is required to complete the process of disabling the id. Please follow the prompts and save your final update. When you refresh the user list, the disabled contact will now display in red.

When adding a new, direct employee contact, start by filling in the "Login and User Information" section with a business email address and assigning a temporary password. In this area, you will also fill in the contact details such as name, phone and primary product line. The primary product line serves as a default for incidents and searching but can be overridden at any time by the user. All of the information you provide will help the Support teams to serve you better. Also in this section, you will check a box certifying that the user is a direct employee of the company. If the user is a 3rd party consultant and/or not directly employed by the Infor customer, cancel the ID and open a General Request on Xtreme for a brief authorization process.

In the next section, Roles and Permissions, you will be able to assign a "role" for the new user. The available "Role Templates" will be displayed on the left and the permissions that correspond to that role display directly to the right. Each role comes with defined permissions and can only be updated by the Contact Admin. More information about the roles is below. Additional options, such as Environment access and View/Pay Open Invoices (where available) display to the far right. You can also selectively restrict a user's access to specific products if needed. Contact Admins often restrict access so that only authorized users have access to sensitive product data but it can also be used to personalize a user's experience, limiting access to only the products the user is involved with.

A final section is called Other Information and is an area in which you can fill in a Contact Role name and training information. It also displays Customer Comments from the original registration (if that is how the ID was initiated) and leaves room for you to add your own notes.

Upon saving the contact, a confirmation page will be returned. Select close and you will be returned to the Company Users page where you can continue to add, edit, and disable contacts or close out the utility. To notify a new or existing user of his/her password, access the ID just added (or any other ID) and select the "Generate Password" c at the top of the page. A confirmation note will be returned verifying that the password has been reset and the contact has been notified. If you have any questions about this utility or wish to reassign the Contact Administrat functionality to another employee, please open a “General Request” via Infor Xtreme.

Using the NEW Approval Process to Approve Pending Registrations - C@W, CRM, Enspire, FACTS, Lawson, SX.e, Takestock, XA

Recently, Infor Xtreme was enhanced to support an automatic approval process for new contacts who register for Xtreme access, outside of the Contact Admin. Registrations within a specific set of product lines (C@W, CRM, Ens FACTS, Lawson, SX.e, Takestock, XA) will automatically create a pending Contact ID, which then only needs minor involvement from Infor and a quick approval process by a Contact Administrator. The enhancement saves time and resources because new registrations are automatically created in a pending state for Infor to move to the appropriate account, at which time, the Contact Admin is notified and can finalize the approval process.

Once a user has registered and Infor has moved the pending ID to the correct account, the Contact Admin(s) receives an email. **If the pending contact is a valid user, the Contact Admin(s) should:**

- Access the pending contact ID, by hovering over the "Administration" link at the top of any page. Via the "Manage Contacts" dropdown, there will be two options: "Add/Edit Contact" and "Pending Registrations." For pending registrations in which you received an email notification, select the Pending Registrations option. The pending ID(s) will appear in red until the ID has been approved or denied. (Alternatively, to add or edit existing contacts, select Add/Edit Contact.)

- Change the Registration Status to Approve. That action will automatically change the ID from Account Disabled to Account Enabled.

- Check the authorization checkbox verifying that the contact is a direct employee of the company. (If the contact is not a direct employee, select Deny in the Registration Status field as an interim step and open a General Request on Infor Xtreme to have Customer Care authorize the 3rd party consultant first. After the 3rd party authorization is complete, Infor Customer Care will enable the 3rd party ID.)

- Review the default Contact Roles and permissions (see below for possibilities) and edit as necessary.

- Save the ID.

The Contact Admin approval process will reset the password for the new ID and automatically send an email confirmation to the new user.

If the pending registration is not approved:

- Select Deny and one of the pre-defined reasons in the dropdown.

- The denied user will receive an email explaining that the registration was denied as well as the reason. The pending ID will disappear from your pending registrations and the user will not have access to your account.

NOTE: This utility has been rolled out to customers with these product lines only: C@W, CRM, Enspire, FACTS, Lawson, SX.e, Takestock, XA. It will eventually be supported for all product lines.

CONTACT ROLES and PERMISSIONS:

- Restricted role: Limited functionality only - Documentation, Announcements, Communities, key form. (No access to Incidents, KBs or software.)

- Incident Browser role: Limited functionality + View-only incidents. (Cannot add/update incidents and no KB or software access.)

- Full Browser role: Limited functionality + View-only incidents + view-only general KB articles. (Cannot add/update incidents or download KB files. No software access.)

- Individual Limited role: Limited functionality + view/add/update incidents for her/himself but not for others + web chat + view-only general KB articles. (Cannot download KB files; no patch or software access.)

- Company Limited role: Limited functionality + view/add/update incidents for whole company + web chat + view-only general KB articles. (Cannot download KB files; no patch or software access.)

- Company Standard role: Limited functionality + view/add/update incidents for whole company + web chat + view general KB articles + download non-software KB files. (Cannot view patch or software KBs or access the Download Center.)

- Company Extended roles: Limited functionality + view/add/update incidents for whole company + web chat + view general and patch KBs + download non-software and patch KB files. (Cannot download full software or access the Download Center.)

- Company Administrator: All functionality - view/add/update incidents for whole company + web chat + view all and download all KB files + access the Download Center.

Please note that all of these roles and permissions are based on your company's current license/entitlement and are restricted to the permissions that the account has as a whole. In some instances, the permissions available to an acc are limited so a user cannot have more individual authority than the account as a whole. The following chart summarizes the roles and their corresponding permissions:

CONTACT ROLE	Incidents	Chat	KB Type Access	Attachments	Sof
Restricted	None	None	None	None	
Incident Browser	View only	None	None	None	
Full Browser	View only	None	General Knowledge	None	None
Individual Limited	User only	Full	General Knowledge	None	None
Company Limited	Full	Full	General Knowledge	None	None
Company Standard	Full	Full	General Knowledge	Non-software	None
Company Extended	Full	Full	General Knowledge + patch KBs	Non-software + patches	Patches
Company Administrator	Full	Full	All	All	Patches + Products

Also note that the users on your account cannot view and/or change the role assigned to them. It's best to advise the user if his/her access has been limited in order to avoid confusion and questions. Finally, in rare instances, a user may require a unique set of permissions which do not conform to the pre-defined roles. For example, a user may require the ability to download software but not the ability to open incidents. If that is the case, the Contact Admin should open a General Request on Infor Xtreme and the Customer Care team will assist by creating a custom role for that user.

INDEPENDENT PERMISSIONS (Can be assigned independently of a Contact Role):

Environment Access:

VIEW ONLY - allows view-only access to the environment data but prevents the ability to update.

FULL - allows full access to the environment data with the ability to update.

OFF - prevents access to the environment data.

Access Web Chat:

ON - allows the user the ability to initiate a chat session when the user has the add/edit capability. (Please note that Web Chat is not available on all product lines and/or for some partner customers.)

OFF - prevents the user the ability to initiate a chat session.

View and Pay Open Invoices:

ON - allows the link to pay invoices online.

OFF - prevents the link to pay invoices online.

Access All Products:

ON – allows full access to the licensed/maintained products on the account. The user will continue to see all the Infor licensed product lines and products for the company to which he/she is assigned. This is the default for new users.

OFF – prevents a user's access to specified product lines and products within all areas of the portal. When this permission is turned off, a tree grid with all the Infor licensed product lines and products is displayed. Here, the Contact Admin can restrict which product lines or products for which the user should have access. Note to Contact Admins: this permission does not display on the preliminary approval/denial page for pending registrations. Once an ID has been approved and saved, the Contact Admin may access the ID on the Company Users page to restrict the user's access by product/product line at that time.

Should you have questions about the use of the Contact Admin functionality, please open a General Request on Infor Xtreme.

Affected Products & Releases

Affected Product	Affected Release	Patch Status	Notes
Worldwide Customer Care	N/A		

Recommended Articles for Products :

Recommended Articles for Releases :

Keywords :	
Type :	Knowledge
Classification :	
Severity :	3 - Medium
Status :	Complete
Last Updated :	29 Sep 2016
Platform :	Windows
Platform OS :	Windows
Platform OS Version :	11.23

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