



# **Lexmark Global Services Partner Portal**

**User Provisioning Guide  
for Delegated Administrators**

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# Overview

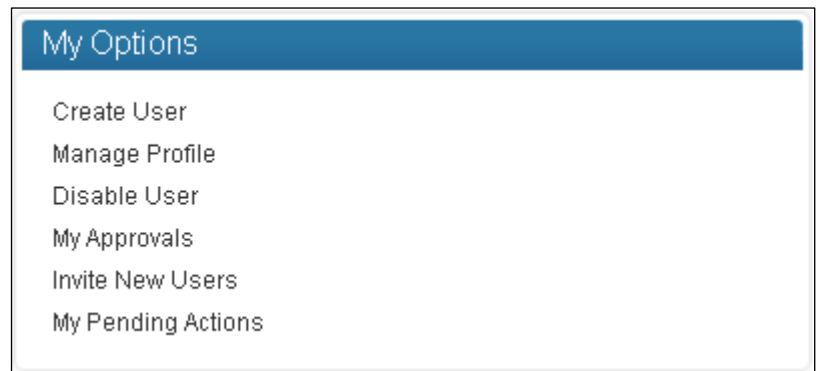
The administrative controls were developed to enable selected individuals to have access to manage business user identities within the Service Portal. This manual describes administrative user navigation and the functionalities of these administrative controls.

Role-based access control has been implemented within the administrative controls. The following role will be addressed in this document:

- **Delegated Administrators** – Delegated Administrators will manage the identities of their own companies. This would include ID creation and update. The Delegated Administrator role is given to external users.

Users with Delegated Administration powers can perform the following functions:

- Create users
- Disable users
- Approve/reject users
- Invite users to register
- Update user attributes



Functionalities that are available with this application can be broadly classified into the following categories:

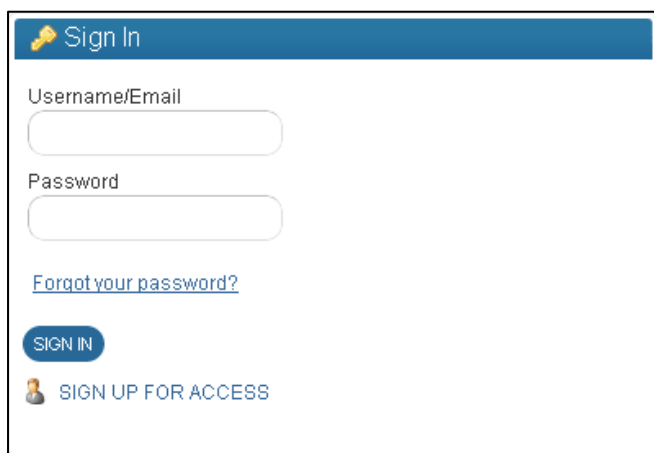
- **User Profile Creation and Management** – User profiles can be created and managed by all the administrators of the application. The type of administrator role assigned governs access scope. All administrators can create and update user profiles, assign and remove roles, reset passwords and disable users.
- **Approvals** – Administrators can approve or reject account requests that fall under their administration. This functionality also allows the administrator to view their approval history.
- **Assign Roles** – Business Administrators and Delegated Administrators can only assign or remove roles for users of the companies they administer.
- **User Invitation** – Administrators can send invitations to individual users or groups of users (who will have similar roles/access). Users will receive their invitation via email, which will contain a link to immediately activate their account.

# Access

To access the administrative controls, users must first log in to the Portal. Once approved, Delegated Administrators will be able to log in using their registered email address and password.

## How to Log In

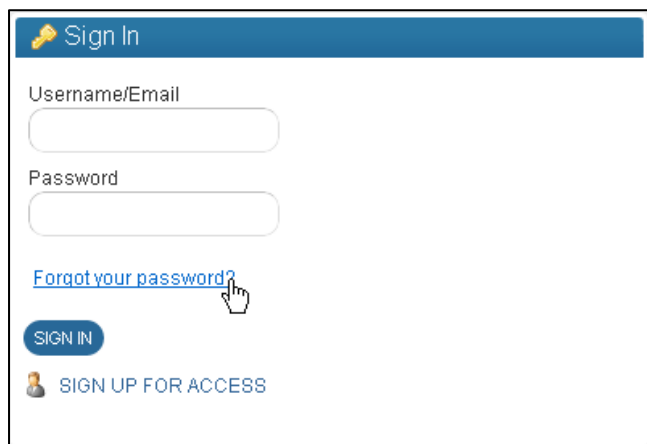
1. Go to <https://lgs.lexmark.com>.
2. Enter your registered email address and password in the appropriate boxes.



A screenshot of the Lexmark Sign In page. The page has a blue header with a key icon and the text "Sign In". Below the header, there are two input fields: "Username/Email" and "Password". Below the "Password" field is a link that says "Forgot your password?". At the bottom of the form, there is a blue button labeled "SIGN IN" and a link that says "SIGN UP FOR ACCESS" with a user icon.

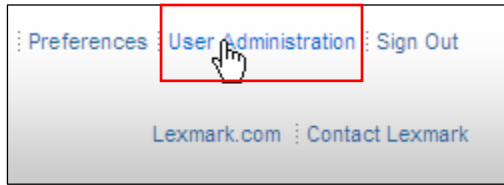
3. Click 

To reset your password, click on "Forgot your password?" and you will be prompted to enter your email address. A link will then be emailed to you, which will allow you to reset your password.

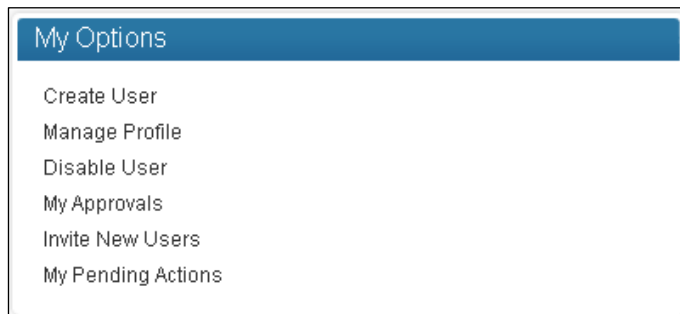


A screenshot of the Lexmark Sign In page, identical to the one above. A hand cursor is pointing at the "Forgot your password?" link, indicating where to click to reset the password.

1. Once you have logged in you will default to the home page. Depending on your role and access granted, you will see a version of the screen shown below. To access the administrative controls, click on “User Administration” in the upper right corner of the screen.



2. You will then be taken to the “My Options” homepage. Delegated Administrators will view the following options:



---

Please note that 30 minutes of inactivity in the Portal will cause you to be automatically logged out.

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## How to Log Out

There are two methods for logging out.

1. Click on “Sign Out”, located in the upper right corner of your screen.



## User Functions

New users can be added to the Portal through the administrative controls. This option is available to all administrators; however, the company to which a user can be assigned may be restricted depending on the administrator type. Delegated Administrators can only create users for the companies that they are allowed to administer. Administrators can also update a user profile (name, email address, password, address, etc), as well as disable a user. Disabling a user will completely remove the user's profile from the system. If a disabled user needs to be added back to the system their profile will need to be re-created.

## Adding Users to the Portal

New users can be added to the Portal in three ways: by creating users, by self-registration, or by invitation.

- **Creating Users**

User profiles can be completely set up by administrators. Adding new users via the "Create User" function will require the administrator to know and enter all of the user's information, including but not limited to:

- Name
- Address
- Email address
- Phone number
- Company association
- Role

The password will have to be set by the administrator and communicated to the user once the user is set up.

- **Self-Registration**

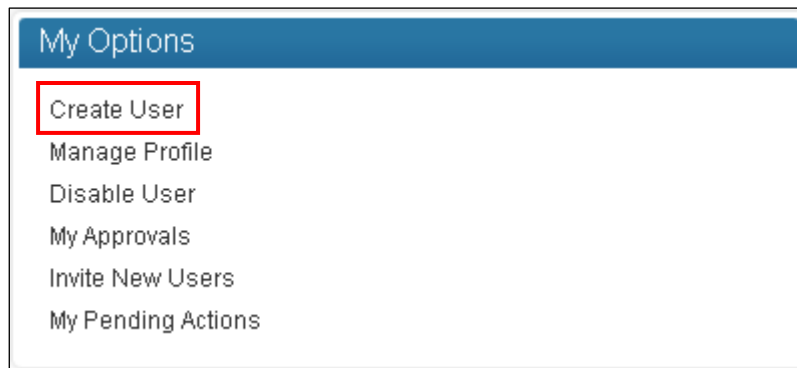
New users can go to <https://globalservices.lexmark.com> and click on "Sign Up for Access." Users must know the Shared Key in order to self-register and requests must be approved by an administrator before a user can access the Portal. Only Business Administrators have the ability to look up a company's Shared Key, which must be communicated to the Delegated Administrator. Delegated Administrators must then communicate the Shared Key to their users.

- **Invitation**

New users can be invited to join the Portal using the "Invite New Users" feature. The primary benefit of inviting users is the ability to set user preferences prior to sending out the invitation. Because invitations can be sent to multiple users simultaneously, an administrator may set up users (with similar preferences) en masse instead of one at a time. When users are invited to join the Portal, an email will be sent to the user's email address inviting them to register. As soon as they click the link to confirm their registration, the user will have access to the Portal. Users can then update their own profile, including password.

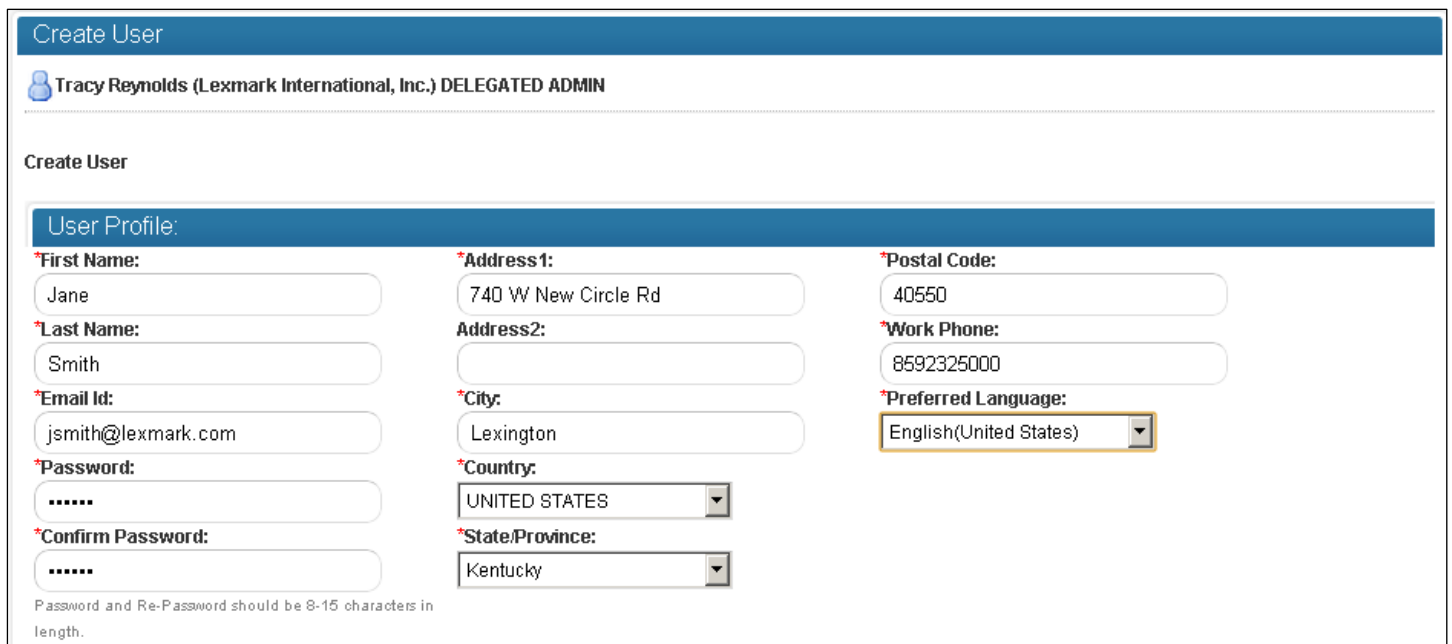
## How to Create a User

1. Click on "Create User" in the "My Options" menu.



The screenshot shows a 'My Options' menu with a blue header. Below the header, the 'Create User' option is highlighted with a red rectangular box. Other options listed in the menu include 'Manage Profile', 'Disable User', 'My Approvals', 'Invite New Users', and 'My Pending Actions'.

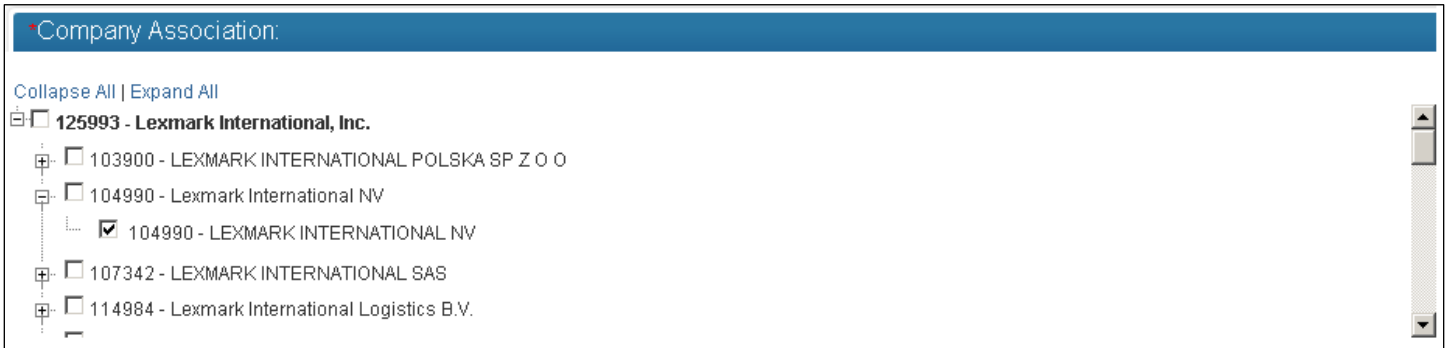
2. Populate the required fields with the correct user information.



The screenshot shows the 'Create User' form. At the top, there is a blue header with the text 'Create User'. Below the header, the user's name and role are displayed: 'Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN'. The form is titled 'Create User' and contains a section for 'User Profile:'. The form fields are organized into three columns. The first column contains fields for 'First Name' (Jane), 'Last Name' (Smith), 'Email Id' (jsmith@lexmark.com), 'Password' (masked with dots), and 'Confirm Password' (masked with dots). The second column contains fields for 'Address1' (740 W New Circle Rd), 'Address2' (empty), 'City' (Lexington), 'Country' (UNITED STATES), and 'State/Province' (Kentucky). The third column contains fields for 'Postal Code' (40550), 'Work Phone' (8592325000), and 'Preferred Language' (English(United States)). A note at the bottom of the form states: 'Password and Re-Password should be 8-15 characters in length.'



- Assign the user to a company by placing a checkmark in the box next to the desired company. Only one company may be chosen.





Company Association:

Collapse All | Expand All

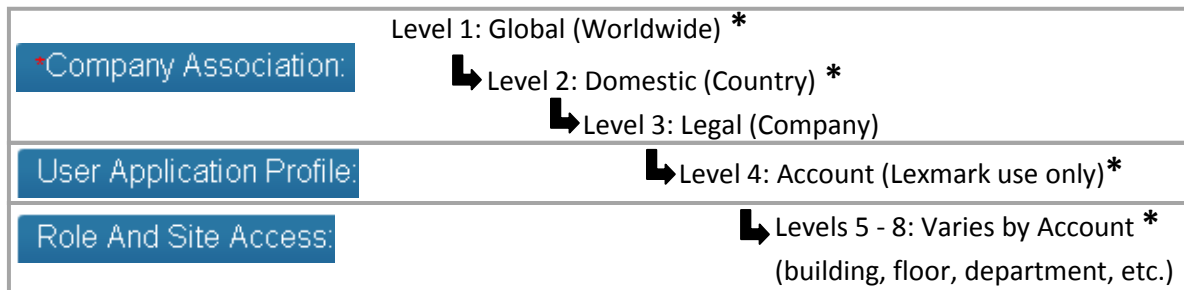
- ☐ 125993 - Lexmark International, Inc.
  - ☐ 103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O
  - ☐ 104990 - Lexmark International NV
    - ☒ 104990 - LEXMARK INTERNATIONAL NV
  - ☐ 107342 - LEXMARK INTERNATIONAL SAS
  - ☐ 114984 - Lexmark International Logistics B.V.



Note that companies are set up in a hierarchical structure. A plus sign  next to a company name indicates that there are multiple levels of that company available. Not all companies will have multiple levels. Click  to expand the company hierarchy and view the options. There can be up to 3 levels of a company's hierarchy available under "Company Association." Checking the box next to a company name assigns the user to that particular company. The user will then be restricted to view only the relevant information/assets of the company (and the sub-levels of the company) to which they have been assigned. See page X for a visual explanation of the MDM Hierarchy structure.

PORTAL LOCATION

LEVEL



Level 1: Global (Worldwide) \*

Level 2: Domestic (Country) \*

Level 3: Legal (Company)


Level 4: Account (Lexmark use only)\*

Levels 5 - 8: Varies by Account \*  
(building, floor, department, etc.)

\* Not present for all accounts

**OPTIONAL STEP:**

- Assign the user to an account association (if applicable) by selecting ALL of the accounts available under "Account Association."



User Application Profile:

Company Type:

- ☒ Commercial
- ☒ Company Code
- ☒ OEM
- ☒ Alliance Partner
- ☒ CSS
- ☒ Authorized Service Provider
- ☒ National

Account Association:

- LEXMARK INTERNATIONAL, INC.(23591) - Commercial - Business
- LEXMARK INTERNATIONAL, INC.(23590) - Alliance Partner - Alliance Partners / OEM
- LEXMARK INTERNATIONAL, INC.(174942) - OEM - Alliance Partners / OEM
- LEXMARK INTERNATIONAL, INC.(211012) - Company Code - Internal
- LEXMARK INTERNATIONAL, INC.(170262) - CSS - Business
- LEXMARK INTERNATIONAL, INC.(222899) - Authorized Service Provider - Services De
- LEXMARK INTERNATIONAL, INC.(170263) - Commercial - Managed Print Business



If a company has more than three levels in their hierarchy structure, the fourth level (account level) can be found in "User Application Profile" in the "Account Association" box. "User Application Profile" will only appear on the page if a company at Level 3 of the hierarchy structure was selected in the "Company Association."

5. Assign the user's role(s). Highlight the desired role(s) and move the role(s) to the "Assigned Role" box by clicking the green arrow.

Role And Site Access:

**Assigned Role:**

Partner Administrator  
Partner Secure Support

**Available Role:** ↓ ↑

Accounts Receivable  
Service Administrator  
Service Manager  
Service Technician

**Save User and Configure:**

Partner Portal

*Note:*

- Fields marked with a red asterisk (\*) are required.
- Tree nodes are in the format : *Company MDM ID - Company Name*

CREATE

CANCEL





A user's role will determine how many of the different functions will be available to a given user in the Portal (see table). More than one role can be selected by using the Control or Shift key; however, at least one role **MUST** be selected.

Access & Capabilities by Role	Home Page	Service Requests	View Service Request	Accept Service Request	Update Service Request	Debrief Service Request	Payments	Reports	Document Library	Warranty Entitlement	User Administration	Secure Support & Downloads
<b>Service Technician</b>												
User who repairs devices	X		X	X	X	X			X	X		
User who has the capability to submit, update, and debrief a service request												
<b>Service Manager</b>												
User with a managerial role with the company who can view reports and documents	X		X	X	X	X		X	X	X		
User who also has the capability to submit, update, and debrief a service request												
<b>Accounts Receivable (Billing)</b>												
User who reviews payments received from Lexmark for work completed on a service request	X		X				X	X	X	X		
User also has the ability to view service requests												
User who can view reports and documents												
<b>Service Administrator (User Management)</b>												
User identified as the Delegated Administrator who creates and manages user ids for the company in which they are assigned to administer	X							X	X	X	X	
User who can view reports and documents												
<b>Partner Administrator</b>												
User who acts as an administrator for a technician and has all the same access as the technician	X		X	X	X	X		X	X	X		
<b>Partner Secure Support</b>												
User who has the ability to access the secure Support & Downloads site to view service manuals and KnowledgeBase articles												X

**OPTIONAL STEP:**

6. Assign the user to a Customer Hierarchy Level (CHL) of 5 or lower (if applicable) by clicking on “Partner Portal.”

Role And Site Access:

Assigned Role:	Save User and Configure:
Partner Administrator Partner Secure Support	<b>Partner Portal</b>
Available Role:  	
Accounts Receivable Service Administrator Service Manager Service Technician	





Not all accounts will have the option to assign a user to Level 5 (or lower). This will be determined by the account’s MDM hierarchy setup.

User Authorization - Google Chrome

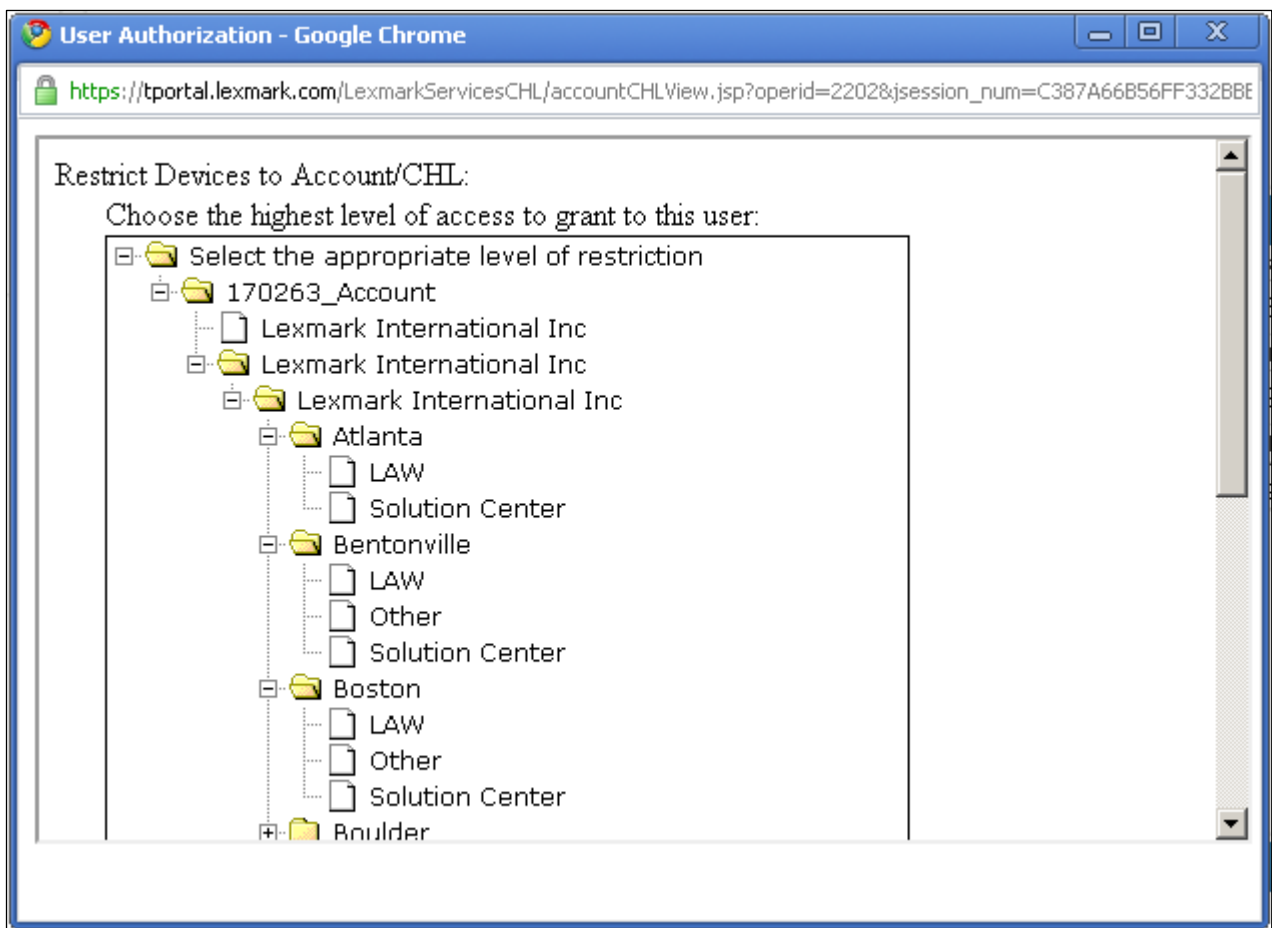
[https://tportal.lexmark.com/LexmarkServicesCHL/accountCHLView.jsp?operid=22028&jsession\\_num=C387A66B56FF332BBE](https://tportal.lexmark.com/LexmarkServicesCHL/accountCHLView.jsp?operid=22028&jsession_num=C387A66B56FF332BBE)

Restrict Devices to Account/CHL:

Choose the highest level of access to grant to this user:

  Select the appropriate level of restriction

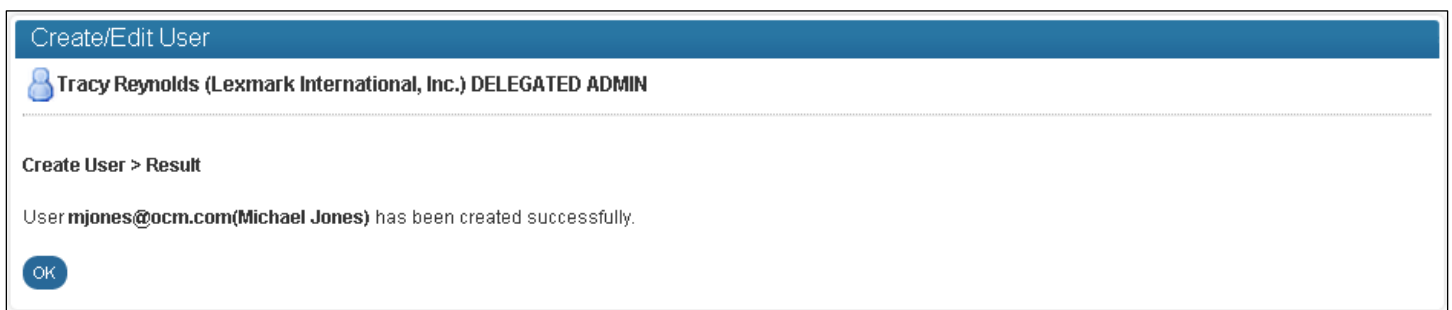
SUBMIT CANCEL



7. Click "Submit."

8. Click "Save."

Once a user has been successfully created, a confirmation screen will be displayed.



9. The administrator will need to email the user to notify them of their active status in the Portal and to provide the user with their password. It is recommended that the user be advised to change their password upon initial login to the Portal.


## Invite New User

A report option is available under “Invite New Users.” This report allows you to view all users who have been sent invitations, as well as the status of each user. The status options include:

- **Invited**—Users have been sent invitations but have not yet responded.
- **Accepted**—Users have been sent invitations and have accepted them. They are active in the Portal system.
- **Rejected**—Users were sent invitations but before they accepted the invitation, they were un-invited.

To customize the report, un-check any of the boxes (Invited, Accepted, or Rejected) then click “Refresh Report.” At least one box must be checked.















Invite New Users

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Invite User Report

☒ Invited ☒ Accepted ☒ Rejected [REFRESH REPORT](#)


7 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

User ID	Company Name	Request Status	Request Date
 ckymme@gmail.com	Lexmark International, Inc.(125993)	 Accepted	03/02/2011 22:22:36
 keldridg@yahoo.com	Lexmark International, Inc.(125993)	 Invited	03/03/2011 13:35:18
 trreynol@lexmark.com	Lexmark International, Inc.(125993)	 Rejected	03/24/2011 10:35:50
 julguilf@lexmark.com	Lexmark International, Inc.(125993)	 Rejected	03/24/2011 10:42:15
 kbohanno@lexmark.com	Lexmark International NV(104990)	 Accepted	03/21/2011 16:34:57
 julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)	 Rejected	03/24/2011 13:00:01
 mmartin@lexmark.com	MARCEL INDUSTRIE(125993)	 Invited	03/25/2011 10:35:37

[INVITE NEW USER](#) [CANCEL](#)

### Customized report:







Invite New Users

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Invite User Report

☐ Invited ☐ Accepted ☒ Rejected [REFRESH REPORT](#)

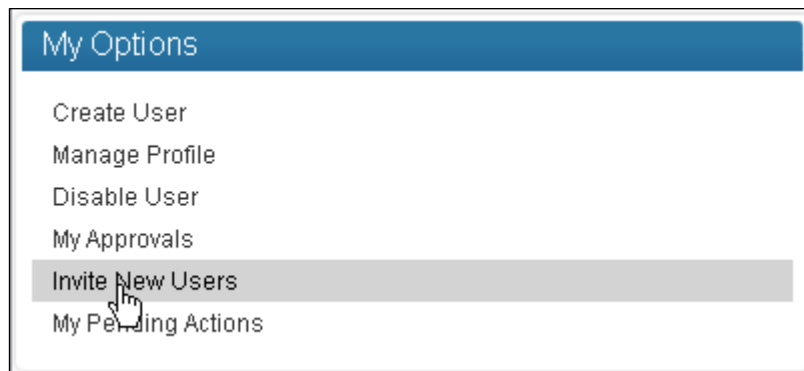
3 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

User ID	Company Name	Request Status	Request Date
 trreynol@lexmark.com	Lexmark International, Inc.(125993)	 Rejected	03/24/2011 10:35:50
 julguilf@lexmark.com	Lexmark International, Inc.(125993)	 Rejected	03/24/2011 10:42:15
 julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)	 Rejected	03/24/2011 13:00:01

[INVITE NEW USER](#) [CANCEL](#)

## How to Invite a User

1. Click on “Invite New Users” in the “My Options” menu.



2. Click “Invite New User.”

Invite New Users

**Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

**Invite User Report**  
☒ Invited ☒ Accepted ☒ Rejected [REFRESH REPORT](#)

7 Items found. Displaying page 1 of 1  
[\[First/Prev\]](#) 1 [\[Next/Last\]](#)

User ID	Company Name	Request Status	Request Date
ckymme@gmail.com	Lexmark International, Inc.(125993)	Accepted	03/02/2011 22:22:36
keldridg@yahoo.com	Lexmark International, Inc.(125993)	Invited	03/03/2011 13:35:18
trreynol@lexmark.com	Lexmark International, Inc.(125993)	Rejected	03/24/2011 10:35:50
julguilf@lexmark.com	Lexmark International, Inc.(125993)	Rejected	03/24/2011 10:42:15
kbohanno@lexmark.com	Lexmark International NV(104990)	Accepted	03/21/2011 16:34:57
julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)	Rejected	03/24/2011 13:00:01
mmartin@lexmark.com	MARCEL INDUSTRIE(125993)	Invited	03/25/2011 10:35:37

[INVITE NEW USER](#) [CANCEL](#)

3. Enter the user's email address in the "User Emails" box. More than one email address can be entered at one time.

**Invite User**

User Emails:

Enter one or more Email addresses for those you wish to invite and click on the Validate Email button to check the validity of your invitation.

Validate Email

\* Preferred Language :

Preferred Language :

Please Select

\* Company Association:

[Collapse All](#) | [Expand All](#)

☐ 125993 - Lexmark International, Inc.



Users who have already self-registered (but are still awaiting approval) cannot also be invited to join the Portal. Attempting to invite a user who has a pending self-registration request will result in an error message. You will have the option to move the request to your "My Pending Actions" list. If you choose this option, the user request will be moved to the report available in "My Pending Actions." You can then approve the users in this module.

User Emails:

Some of the invite request are invalid and cannot be processed. Please refer below.

Following user(s) have already raised a self registration request and are pending your approval in the system. To create their Lexmark account please add the users to your pending action list and then approve.

☐ tester3@lexmark.com

☐ tester2@lexmark.com

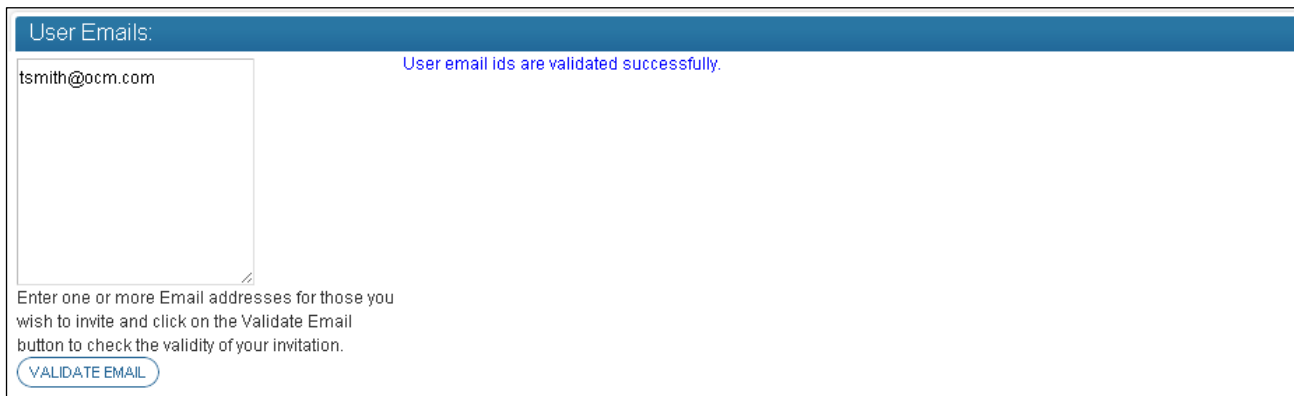
Add to Pending Action

Enter one or more Email addresses for those you wish to invite and click on the Validate Email button to check the validity of your invitation.

VALIDATE EMAIL

- Click “Validate Email” to verify the validity of the email address(es). Valid email addresses must be in the correct format (name@site.com) and cannot already exist in the Portal.

#### Valid email address:

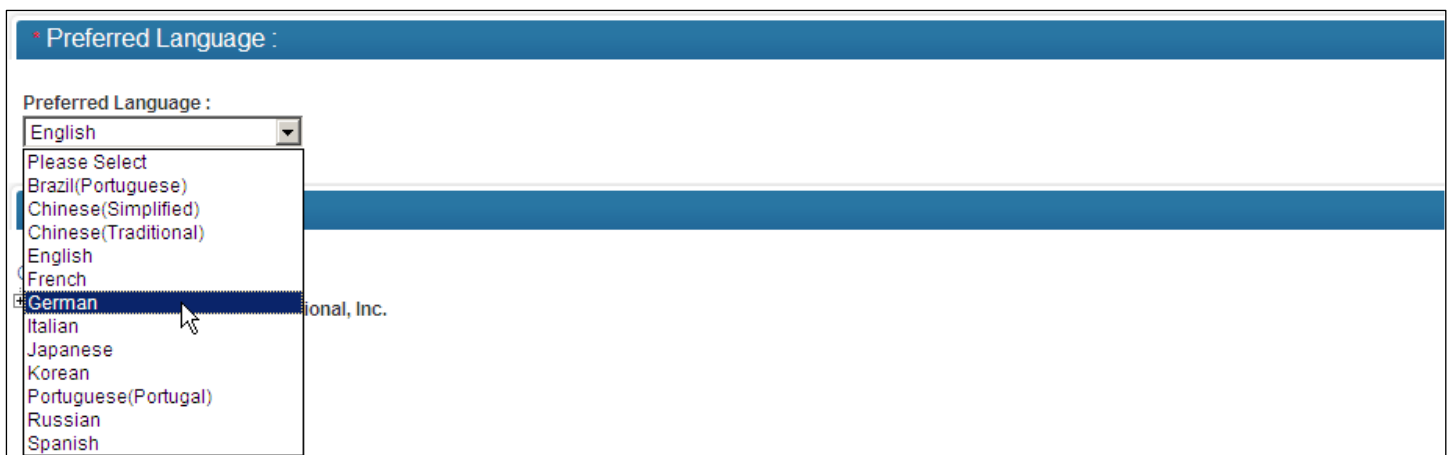


The screenshot shows a web form titled "User Emails:". It contains a text input field with the email address "tsmith@ocm.com". To the right of the input field, a blue message states "User email ids are validated successfully." Below the input field, there is instructional text: "Enter one or more Email addresses for those you wish to invite and click on the Validate Email button to check the validity of your invitation." At the bottom of the form is a blue button labeled "VALIDATE EMAIL".



An error message will appear if the email address is invalid or if the email address already exists in the Portal.

- Choose the preferred language from the drop-down menu. This will determine the language used in the email sent to the user(s) inviting them to register, as well as the language in their personal view of the Portal.



The screenshot shows a web form titled "Preferred Language:". Below the title is a dropdown menu currently set to "English". The dropdown is open, displaying a list of languages: "Please Select", "Brazil(Portuguese)", "Chinese(Simplified)", "Chinese(Traditional)", "English", "French", "German", "Italian", "Japanese", "Korean", "Portuguese(Portugal)", "Russian", and "Spanish". A mouse cursor is pointing at the "German" option. The text "ional, Inc." is partially visible to the right of the dropdown.

- Under “Company Association”, choose the company to which you would like to assign the user by placing a checkmark in the box next to the company name (see page 8 for more information on assigning a user to a company).



The screenshot shows a web form titled "Company Association:". Below the title are links for "Collapse All" and "Expand All". A list of companies is displayed, each with a checkbox and a plus icon to its left. The companies are: "125993 - Lexmark International, Inc.", "103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O", "104990 - Lexmark International NV", "107342 - LEXMARK INTERNATIONAL SAS" (which has its checkbox checked), "114984 - Lexmark International Logistics B.V.", and "123501 - LEXMARK INTERNATIONAL (SINGAPORE) PTE LTD". A vertical scrollbar is on the right side of the list.



7. Assign the user to an account association (if applicable) by selecting ALL of the accounts available under “Account Association” (see page 8 for more information on account association).

**User Application Profile:**

**Company Type:**

- ☒ Commercial
- ☒ Company Code
- ☒ OEM
- ☒ Alliance Partner
- ☒ CSS
- ☒ Authorized Service Provider
- ☒ National

**Account Association:**



- LEXMARK INTERNATIONAL, INC.(23591) - Commercial - Business
- LEXMARK INTERNATIONAL, INC.(23590) - Alliance Partner - Alliance Partners / OEM
- LEXMARK INTERNATIONAL, INC.(174942) - OEM - Alliance Partners / OEM
- LEXMARK INTERNATIONAL, INC.(211012) - Company Code - Internal
- LEXMARK INTERNATIONAL, INC.(170262) - CSS - Business
- LEXMARK INTERNATIONAL, INC.(222899) - Authorized Service Provider - Services De
- LEXMARK INTERNATIONAL, INC.(170263) - Commercial - Managed Print Business

8. Determine the user’s role and site access (see pages 9-11 for more information on assigning a user’s role and site access).

**Role And Site Access:**

**Assigned Role:**

- Partner Administrator
- Partner Secure Support

**Available Role:**  

- Accounts Receivable
- Service Administrator
- Service Manager
- Service Technician

**Save User and Configure:**

- Partner Portal

**Note:**

- Fields marked with a red asterisk (\*) are required.
- Tree nodes are in the format : [Company MDM ID - Company Name](#)

Highlight the role(s) you wish to assign to the user by clicking on the role(s). Multiple selections can be made by using the Control or Shift key. Move the role(s) to the “Assigned Role” box by clicking the green arrow.

9. Click “Invite.”


**Note:**

- Fields marked with a red asterisk (\*) are required.
- Tree nodes are in the format : [Company MDM ID - Company Name](#)

**INVITE** **CANCEL**

10. A confirmation screen will be displayed. Click “OK” to return to the “My Options” menu.

**Invite New Users**

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

**Invite User > Result**

**Invite Status:**

Uid	Invite Status
1 treynol@lexmark.com	Success

**OK**

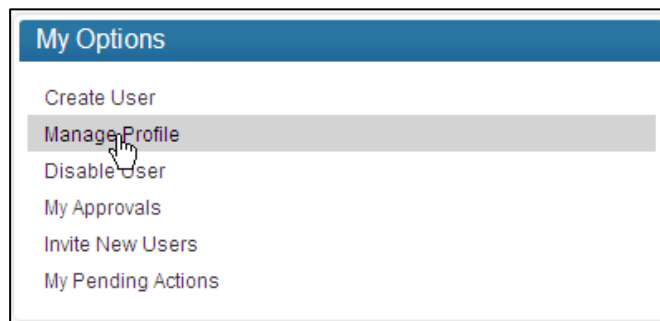
## Manage Profile

Both users and administrators have the ability to update or change information in a user's profile. Any or all of the fields can be updated by an administrator, including:

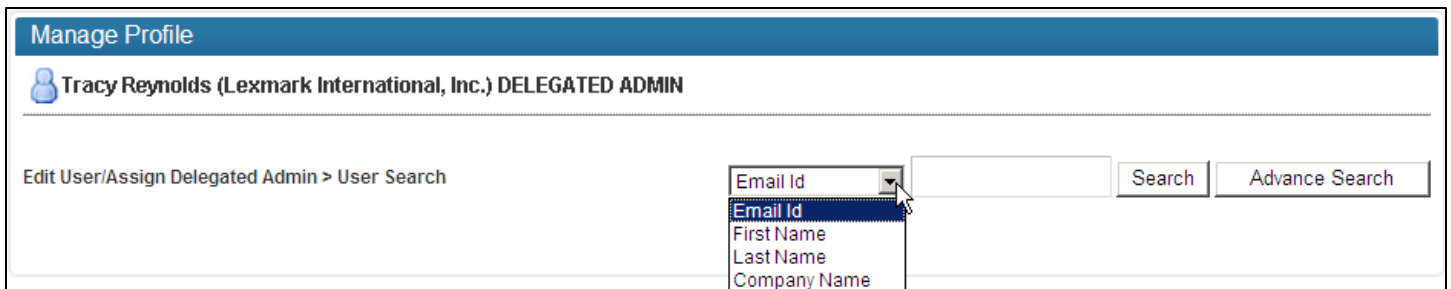
- Name
- Address
- Phone Number
- Email Address
- Password
- Preferred Language
- Company Association
- Role and Site Access

## How to Update a User's Profile

1. Click on "Manage Profile" in the "My Options" menu.




2. Search for the user using one of the following methods:
  - a. The standard search option allows you to enter one of four possible criteria: email ID, first name, last name, or company name.



- b. Click “Advance Search” to enter multiple criteria in the search options. Providing at least one criterion is mandatory.

Manage Profile

 Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN

Edit User/Assign Delegated Admin > User Search

Email Id

Search

Advance Search

Email Id

First Name

Last Name

Company Name


Search

Cancel

3. Click “Search.”

4. A list of results will be displayed. The list can be sorted based on any column by clicking on the column header. Click the radio button next to the name of the user you wish to update.

Manage Profile

 Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN

Edit User > User Search

Email Id

SEARCH

ADVANCE SEARCH

Email Id

First Name

Last Name

smith

Company Name

SEARCH

CANCEL

4 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

Select	User ID	First Name	Last Name	Company ID	Company Name
<input checked="" type="radio"/>	jsmith@ocm.com	Jane	Smith	69145	Lexmark Canada Inc
<input type="radio"/>	johnsmith@ocm.com	John	Smith	125993	LEXMARK INTERNATIONAL, INC.
<input type="radio"/>	dsmith@ocm.com	David	Smith	125993	Lexmark International, Inc.
<input type="radio"/>	jessicasmith@ocm.com	Jessica	Smith	125993	Lexmark International, Inc.


UPDATE USER

CANCEL

16

5. Click "Update User."

Manage Profile

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Edit User

User Profile:

\*First Name:

\*Last Name:

\*Email Id:

Password:

Confirm Password:

\*Address 1:

Address2:

\*City:

\*Country:

\*State/Province:

\*Postal Code:

\*Work Phone:

\*Preferred Language:

Password and Re-Password should be 8-15 characters in length. Leave empty if you are not changing the password.

\*Company Association:

Collapse All | Expand All

☒ 125993 - Lexmark International, Inc.

☐ 103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O

☐ 104990 - Lexmark International NV

☐ 107342 - LEXMARK INTERNATIONAL SAS

☐ 114984 - Lexmark International Logistics B.V.

☐ 123501 - LEXMARK INTERNATIONAL (SINGAPORE) PTE LTD


☐ 125993 - Lexmark International, Inc.

6. The user's information will be displayed. Any of the fields can be edited. Once you have entered the edit(s), click "Save."

Any time updates are made to a user's profile, the "Password" field and "Confirm Password" field both need to match. Unless you are changing the user's password, leave both fields blank.

7. A message confirming your updates will be displayed.

Create/Edit User

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Edit User > Result

User **johnsmith@ocm.com(John Smith)** has been updated successfully.

8. Click "OK" to return to the "My Options" menu.

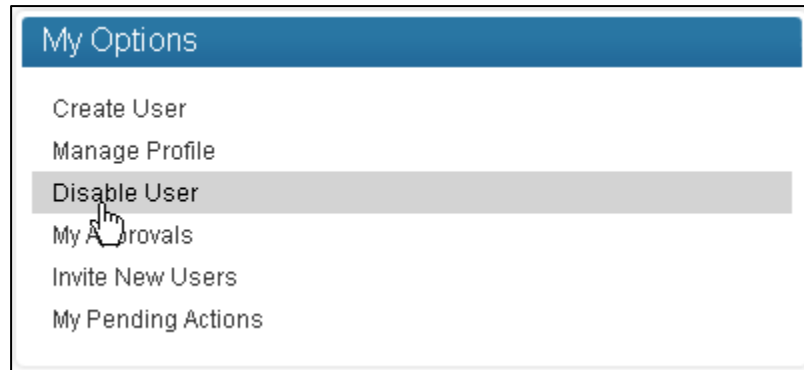
17

## Removing Users

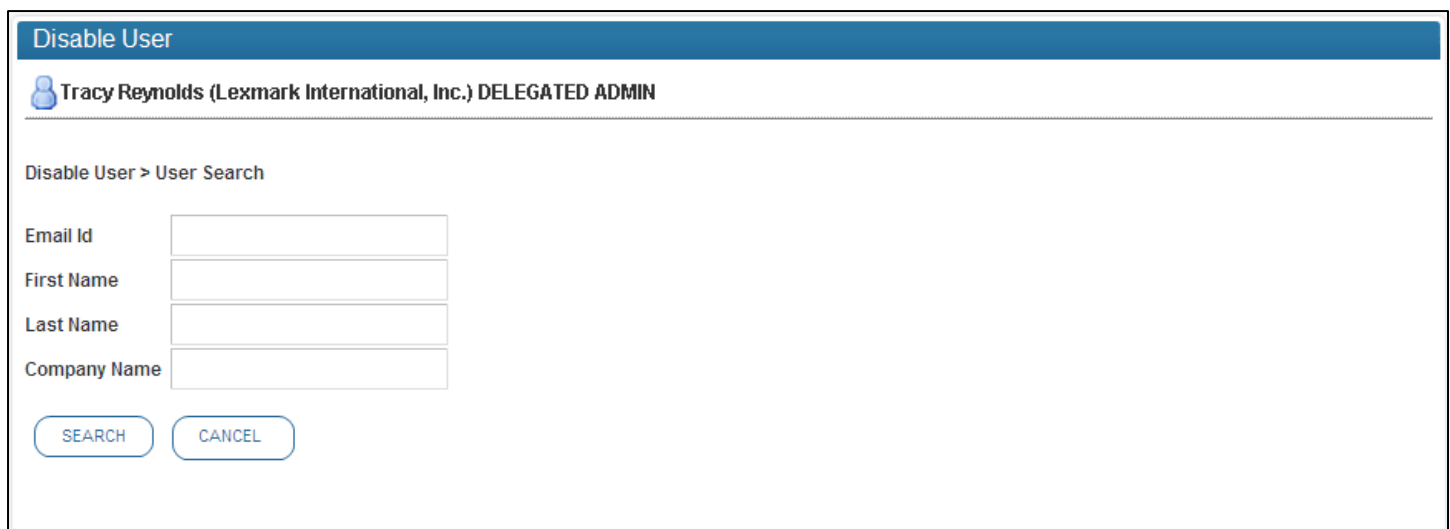
Delegated Administrators can disable user accounts that are registered with companies that they manage. Disabling a user will delete the user profile and they will no longer be able to access the Portal.

### How to Disable a User

1. Click on “Disable User” in the “My Options” menu.



2. Search for the user you wish to disable using any of the criteria as shown below:

A screenshot of the 'Disable User' search form. The form has a blue header bar with the text 'Disable User'. Below the header, there is a user profile section showing a user icon and the text 'Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN'. Below this, the form is titled 'Disable User > User Search'. It contains four input fields: 'Email Id', 'First Name', 'Last Name', and 'Company Name'. At the bottom of the form, there are two buttons: 'SEARCH' and 'CANCEL'.

You must enter at least one letter in at least one of the fields above. Entering information in more than one field will help narrow the search results.

3. A list of results will be displayed. The list can be sorted based on any column by clicking on the column header. Click the radio button next to the name of the user you wish to disable. Multiple users can be disabled simultaneously by placing a checkmark next to more than one name.


3 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

Select	User ID	First Name	Last Name	Company ID	Company Name
<input checked="" type="checkbox"/>	jsmith@ocm.com	Jane	Smith	69145	Lexmark Canada Inc
<input type="checkbox"/>	johnsmith@ocm.com	John	Smith	125993	LEXMARK INTERNATIONAL, INC.
<input type="checkbox"/>	dsmith@ocm.com	David	Smith	125993	LEXMARK INTERNATIONAL, INC.

**DISABLE USER** **CANCEL**

4. Click "Disable User."

**Disable User**

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

---

Disable User > User Search > Disable

Following ID(s) will be disabled:


1 dsmith@ocm.com

**DISABLE USER** **CANCEL**

A confirmation screen will be displayed.

5. Click "Disable User" again if you wish to proceed. If you do not wish to proceed, click "Cancel."

**Disable User**

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

---

Disable User > User Search > Disable

ID disabled status:













Uid	LDAP Status	Database Status
1 dsmith@ocm.com	Success	No role found in DA repository

**OK**

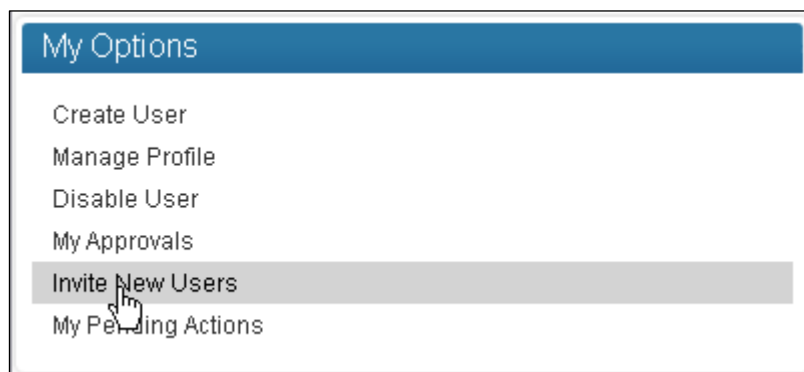
6. Click "OK" to return to the "My Options" menu.

## How to Un-Invite a User









Some situations may exist where an invitation has been extended to a user and the invitation needs to be rescinded. The status of the user must be “Invited” in order to cancel the invitation.

User ID	Company Name	Request Status		Request Date
 ckymme@gmail.com	Lexmark International, Inc.(125993)		Accepted	03/02/2011 22:22:36
 keldridg@yahoo.com	Lexmark International, Inc.(125993)		Invited	03/03/2011 13:35:18
 trreynol@lexmark.com	Lexmark International, Inc.(125993)		Rejected	03/24/2011 10:35:50
 julguilf@lexmark.com	Lexmark International, Inc.(125993)		Rejected	03/24/2011 10:42:15
 kbohanno@lexmark.com	Lexmark International NV(104990)		Accepted	03/21/2011 16:34:57
 julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)		Invited	03/24/2011 12:32:10

1. Click on “Invite New Users” in the “My Options” menu.




2. Click on the User ID of the user you wish to un-invite.

User ID	Company Name	Request Status		Request Date
 ckymme@gmail.com	Lexmark International, Inc.(125993)		Accepted	03/02/2011 22:22:36
 keldridg@yahoo.com	Lexmark International, Inc.(125993)		Invited	03/03/2011 13:35:18
 trreynol@lexmark.com	Lexmark International, Inc.(125993)		Rejected	03/24/2011 10:35:50
 julguilf@lexmark.com	Lexmark International, Inc.(125993)		Rejected	03/24/2011 10:42:15
 kbohanno@lexmark.com	Lexmark International NV(104990)		Accepted	03/21/2011 16:34:57
 julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)		Rejected	03/24/2011 13:00:01
 mmartin@lexmark.com	MARCEL INDUSTRIE(125993)		Invited	03/25/2011 10:35:37

3. A summary screen will be displayed which shows the details of the invitation. Scroll to the bottom of the screen.

Invite New Users

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Invite User Report > Invite Details

User Profile :

Email :

julguilf@lexmark.com

MDM ID :

107342

LEVEL :

DOMESTIC

Company Association :

Collapse All | Expand All

125993 - Lexmark International, Inc.

103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O

104990 - Lexmark International NV

107342 - LEXMARK INTERNATIONAL SAS

107342 - LEXMARK INTERNATIONAL SAS

157413 - LEXMARK EUROPE SARI

User Application Profile And Assigned Role :

Company Detail :

LEXMARK INTERNATIONAL SAS(107342)

Assigned Role :

Account Management

Reject

CANCEL

Back

4. Click on “Reject.”

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5. A confirmation screen will be displayed. Click “Ok” to return to the “My Options” menu.



Once you have rejected an invited user, the “Request Status” of that user will be displayed as “Rejected.” This can be viewed by clicking on “Invite New Users” in the “My Options” menu.

**Invite New Users**

**Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

---

**Invite User Report**

☒ Invited ☒ Accepted ☒ Rejected [REFRESH REPORT](#)

6 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

User ID	Company Name	Request Status	Request Date
ckymme@gmail.com	Lexmark International, Inc.(125993)	Accepted	03/02/2011 22:22:36
keldridg@yahoo.com	Lexmark International, Inc.(125993)	Invited	03/03/2011 13:35:18
trreynol@lexmark.com	Lexmark International, Inc.(125993)	Rejected	03/24/2011 10:35:50
julguilf@lexmark.com	Lexmark International, Inc.(125993)	Rejected	03/24/2011 10:42:15
kbohanno@lexmark.com	Lexmark International NV(104990)	Accepted	03/21/2011 16:34:57
julguilf@lexmark.com	LEXMARK INTERNATIONAL SAS(107342)	Rejected	03/24/2011 13:00:01

[INVITE NEW USER](#) [CANCEL](#)




Rejected users can be invited again by starting at the beginning of the invitation process.

## My Approvals





Accounts registered by end users can be approved or rejected by their respective administrators via the “My Approvals” module. Administrators can also use this module to view a report of their own approval history. To customize the report, check (or un-check) any of the three boxes and click “Refresh Report” (at least one box must remain checked).

My Approvals

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

**Request Report**  
☒ Pending ☒ Rejected ☒ Approved [REFRESH REPORT](#)

4 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

User ID	First Name	Last Name	Company Name	Request Status	Request Date
kimem005@gmail.com	Santii	Vita	LEXMARK INTERNATIONAL, INC.(203551)	 Approved	03/03/2011 15:51:25
kmem006@gmail.com	Canyon	Storm	LEXMARK INTERNATIONAL, INC.(203551)	 Approved	03/03/2011 16:25:44
mpurcell@lexmark.com	Mary	Purcell	LEXMARK INTERNATIONAL, INC.(203551)	 Approved	07/13/2010 04:46:56
kmonroe44444@gmail.com	Kim	Monroe	LEXMARK INTERNATIONAL, INC.(203551)	 Pending	03/22/2011 08:49:13

[CANCEL](#)

## How to Approve a Pending Request

1. Click on “My Approvals” in the “My Options” menu.

My Options

[Create User](#)  
[Manage Profile](#)  
[Disable User](#)  
[My Approvals](#)  
[Invite New Users](#)  
[My Pending Actions](#)

- Click on the User ID of the request you would like to approve. Only requests that are in “Pending” status can be selected. A summary of the user’s information will be displayed. No edits can be made to the “User Profile” section.

My Approvals

**Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Request Report > Request Details

User Profile :

<b>First Name:</b>	<b>Address2 :</b>	<b>Postal Code :</b>
Test		40550
<b>Last Name :</b>	<b>City :</b>	<b>Work Phone :</b>
Lexmark	Lexington	8592325000
<b>Email :</b>	<b>Country :</b>	<b>Preferred Language :</b>
tester4@lexmark.com	UNITED STATES	English(United States)
<b>Address1 :</b>	<b>State/Province :</b>	
740 W New Circle Rd	Kentucky	

- Under “Company Association”, choose the company to which you would like to assign the user by placing a checkmark in the box next to the company name (see page 8 for more information on assigning a user to a company).

\*Company Association:

Collapse All | Expand All

☐ 125993 - Lexmark International, Inc.

☐ 103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O

☐ 104990 - Lexmark International NV

☒ 107342 - LEXMARK INTERNATIONAL SAS

☐ 114984 - Lexmark International Logistics B.V.

☐ 123501 - LEXMARK INTERNATIONAL (SINGAPORE) PTE LTD

- Assign the user to an account association (if applicable) by selecting one or more of the accounts available under “Account Association” (see page 8 for more information on account association).

User Application Profile:

**Company Type:**
☒ Commercial  
☒ Company Code  
☒ OEM  
☒ Alliance Partner  
☒ CSS  
☒ Authorized Service Provider  
☒ National

**Account Association:**
LEXMARK INTERNATIONAL, INC.(23591) - Commercial - Business  
LEXMARK INTERNATIONAL, INC.(23590) - Alliance Partner - Alliance Partners / OEM  
LEXMARK INTERNATIONAL, INC.(174942) - OEM - Alliance Partners / OEM  
LEXMARK INTERNATIONAL, INC.(211012) - Company Code - Internal  
LEXMARK INTERNATIONAL, INC.(170262) - CSS - Business  
LEXMARK INTERNATIONAL, INC.(222899) - Authorized Service Provider - Services De  
LEXMARK INTERNATIONAL, INC.(170263) - Commercial - Managed Print Business

5. Determine the user's role and site access (see pages 9-11 for more information on assigning a user's role and site access). Highlight the role(s) you wish to assign to the user by clicking on the role(s). Multiple selections can be made by using the Control or Shift key. Move the role(s) to the "Assigned Role" box by clicking the green arrow.

Role And Site Access:

Assigned Role:

Partner Administrator  
Partner Secure Support

Available Role:

Accounts Receivable  
Service Administrator  
Service Manager  
Service Technician

Save User and Configure:

Partner Portal

Note:

1. Fields marked with a red asterisk (\*) are required.

2. Tree nodes are in the format : [Company MDM ID - Company Name](#)

6. Click "Approve."
7. A confirmation screen will be displayed. Click "OK" to return to the "My Options" menu.

My Approvals

Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN

Request Report > Request Details > Status

tester1@lexmark.com ID has been Approved.

OK

## My Pending Actions

If an attempt is made to invite a user who has already self-registered, but who has not yet been approved, their request can be moved to the “My Pending Actions” queue to remind a Delegated Administrator to take action on the request. See page X for detailed instructions on how to move a request to “My Pending Actions.”



If a user request is moved to “My Pending Actions,” it will still also be present under “My Approvals.” Action can be taken on the request from either module.

My Pending Actions

**Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Request Report

2 Items found. Displaying page 1 of 1  
[First/Prev] 1 [Next/Last]

User ID	First Name	Last Name	Company Name	Request Status	Request Date
tester2@lexmark.com	Test2	Lexmark	LEXMARK INTERNATIONAL, INC.(170263)	Pending	04/01/2011 13:44:30
tester3@lexmark.com	Test3	Lexmark	LEXMARK INTERNATIONAL, INC.(170263)	Pending	04/01/2011 13:45:32

CANCEL

## How to Approve a Pending Action

1. Click on “My Pending Actions” in the “My Options” menu.

My Options

Create User

Manage Profile

Disable User


My Approvals

Invite New Users

**My Pending Actions**

- Click on the User ID of the request you would like to approve. A summary of the user's information will be displayed. No edits can be made to the "User Profile" section.

**My Pending Actions**

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

**Request Report > Request Details**

**User Profile :**

<b>First Name:</b>	<b>Address2 :</b>	<b>Postal Code :</b>
Test2		40550
<b>Last Name :</b>	<b>City:</b>	<b>Work Phone :</b>
Lexmark	Lexington	8592325000
<b>Email :</b>	<b>Country:</b>	<b>Preferred Language :</b>
tester2@lexmark.com	UNITED STATES	English(United States)
<b>Address1 :</b>	<b>State/Province :</b>	
740 W New Circle Rd	Kentucky	

- Under "Company Association", place a checkmark in the box next to the company name to assign the user to that company (see page 8 for more information on assigning a user to a company).

**Company Association:**

[Collapse All](#) | [Expand All](#)

☐ 125993 - Lexmark International, Inc.

☐ 103900 - LEXMARK INTERNATIONAL POLSKA SP Z O O

☐ 104990 - Lexmark International NV

☒ 107342 - LEXMARK INTERNATIONAL SAS

☐ 114984 - Lexmark International Logistics B.V.

☐ 123501 - LEXMARK INTERNATIONAL (SINGAPORE) PTE LTD

- Assign the user to an account association (if applicable) by selecting ALL of the accounts available under "Account Association" (see page 8 for more information on account association).

**User Application Profile:**

<b>Company Type:</b>	<b>Account Association:</b>
<input checked="" type="checkbox"/> Commercial	LEXMARK INTERNATIONAL, INC.(23591) - Commercial - Business
<input checked="" type="checkbox"/> Company Code	LEXMARK INTERNATIONAL, INC.(23590) - Alliance Partner - Alliance Partners / OEM
<input checked="" type="checkbox"/> OEM	LEXMARK INTERNATIONAL, INC.(174942) - OEM - Alliance Partners / OEM
<input checked="" type="checkbox"/> Alliance Partner	LEXMARK INTERNATIONAL, INC.(211012) - Company Code - Internal
<input checked="" type="checkbox"/> CSS	LEXMARK INTERNATIONAL, INC.(170262) - CSS - Business
<input checked="" type="checkbox"/> Authorized Service Provider	LEXMARK INTERNATIONAL, INC.(222899) - Authorized Service Provider - Services De
<input checked="" type="checkbox"/> National	LEXMARK INTERNATIONAL, INC.(170263) - Commercial - Managed Print Business

- Determine the user's role and site access (see pages 9-11 for more information on assigning a user's role and site access). Highlight the role(s) you wish to assign to the user by clicking on the role(s). Multiple selections can

be made by using the Control or Shift key. Move the role(s) to the “Assigned Role” box by clicking the green arrow.

Role And Site Access:

Assigned Role:

Partner Administrator  
Partner Secure Support

Available Role:

Accounts Receivable  
Service Administrator  
Service Manager  
Service Technician

Save User and Configure:

Partner Portal

Note:


1. Fields marked with a red asterisk (\*) are required.

2. Tree nodes are in the format : [Company MDM ID - Company Name](#)

6. Click “Approve.”

7. A confirmation screen will be displayed. Click “OK” to return to the “My Options” menu.

My Pending Actions

 **Tracy Reynolds (Lexmark International, Inc.) DELEGATED ADMIN**

Request Report > Request Details > Status

tester2@lexmark.com ID have been Approved.

OK

# MDM Hierarchy

Level 1: GLOBAL  
(Worldwide)

Level 2: DOMESTIC  
(Country)

Level 3: LEGAL  
(Company)

Level 4: ACCOUNT  
(Lexmark Use only)

Levels 5 -8: VARY  
BY ACCOUNT  
(department, floor,  
building, state,  
etc.)

