LEXMARK™

Lexmark Global Services Partner Portal

User Provisioning Guide
for Delegated Administrators

September 2011 https://lgs.lexmark.com

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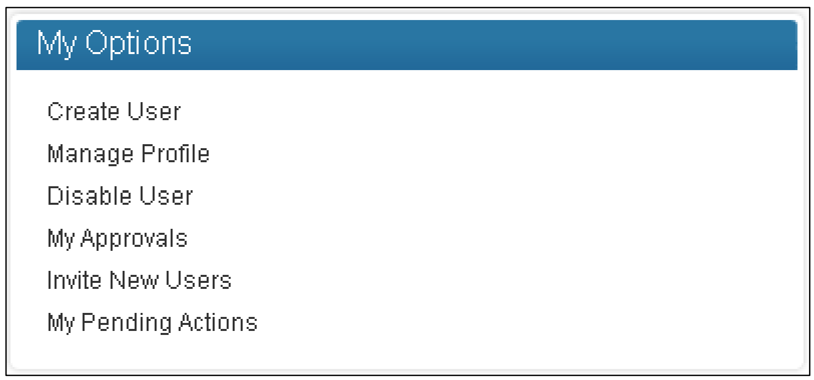
Overview

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.

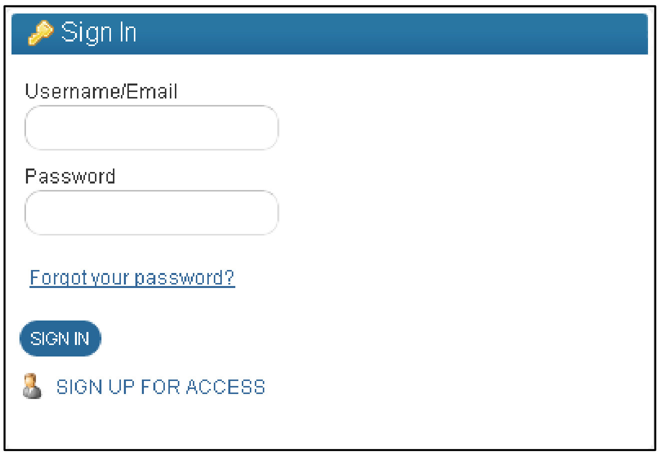
Access

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.



3. Click 

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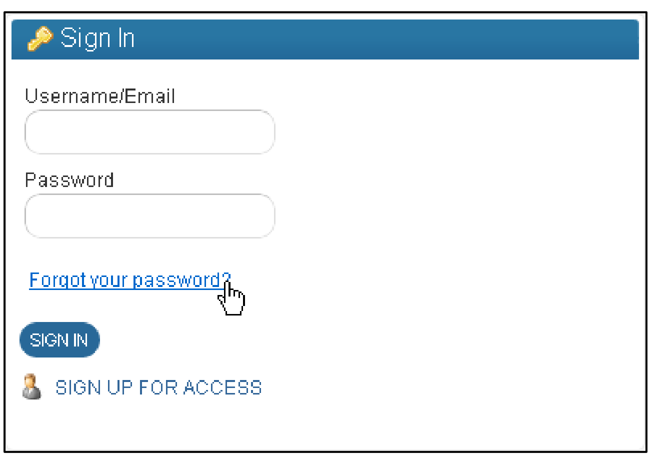
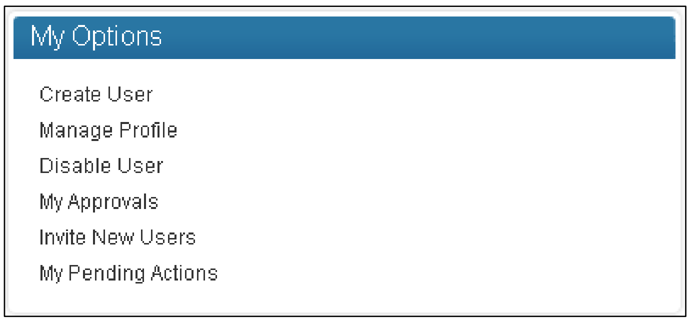
To reset your password, click on “Forgot your password?” and you will be prompted to enter your email address. A link will then be emailed to you, which will allow you to reset your password.



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.

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

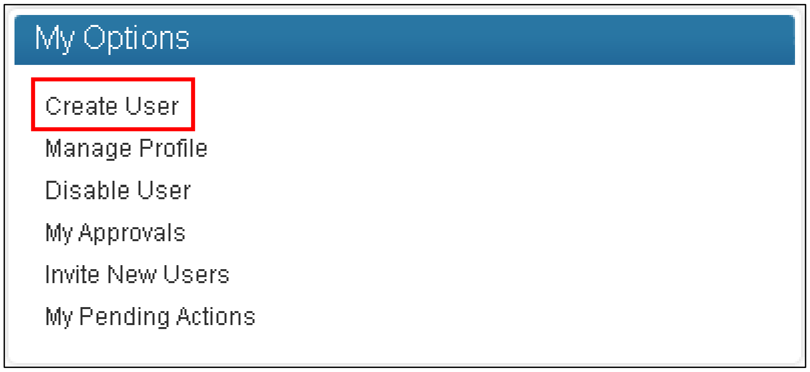
  The password will have to be set by the administrator and communicated to the user once the user is set up.

- **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.

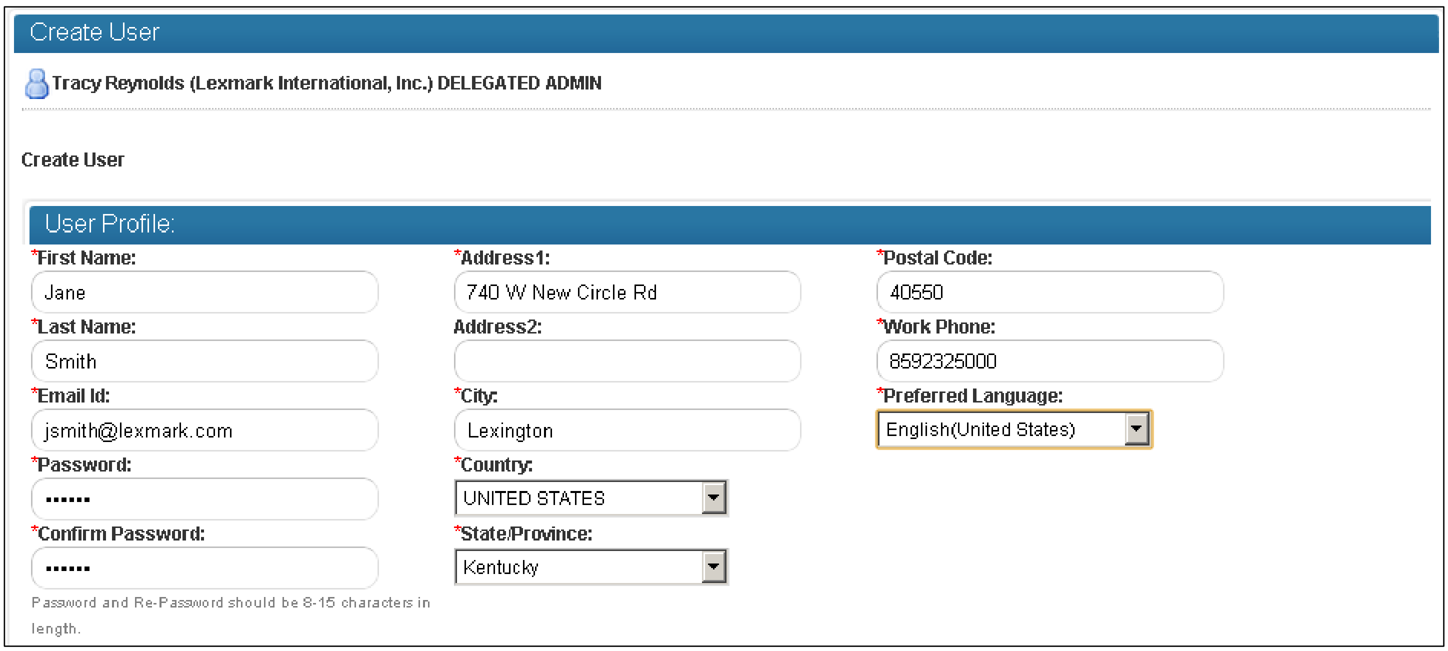
- **Invitation**
  New users can be invited to join the Portal using the "Invite New Users" feature. The primary benefit of inviting users is the ability to set user preferences prior to sending out the invitation. Because invitations can be sent to multiple users simultaneously, an administrator may 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

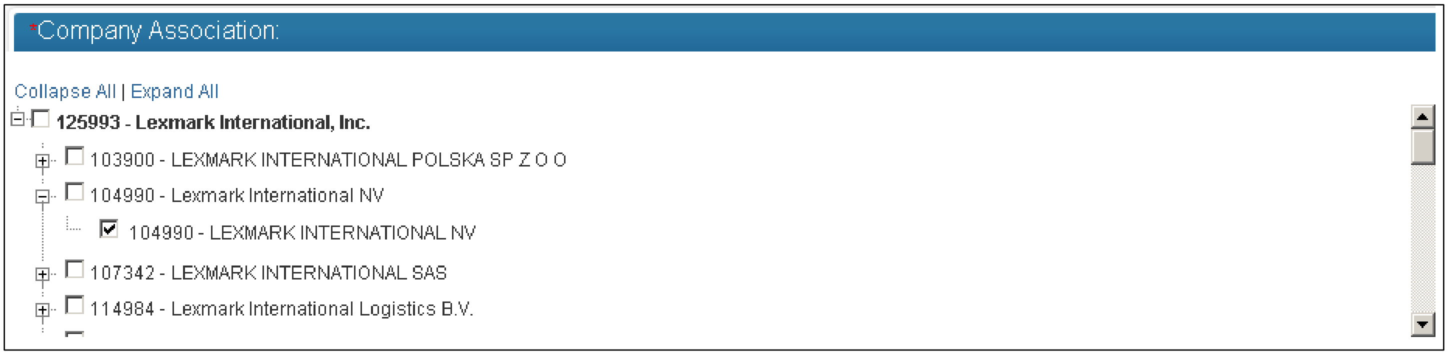
1. Click on “Create User” in the “My Options” menu.



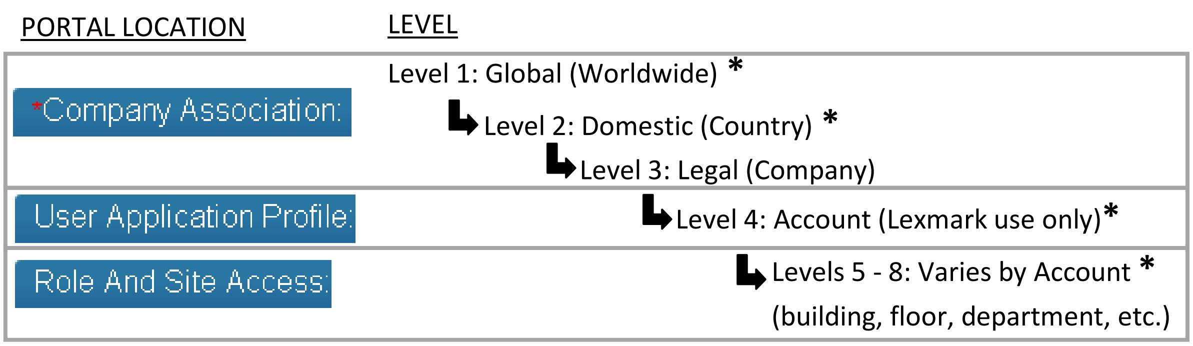
2. Populate the required fields with the correct user information.



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



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.



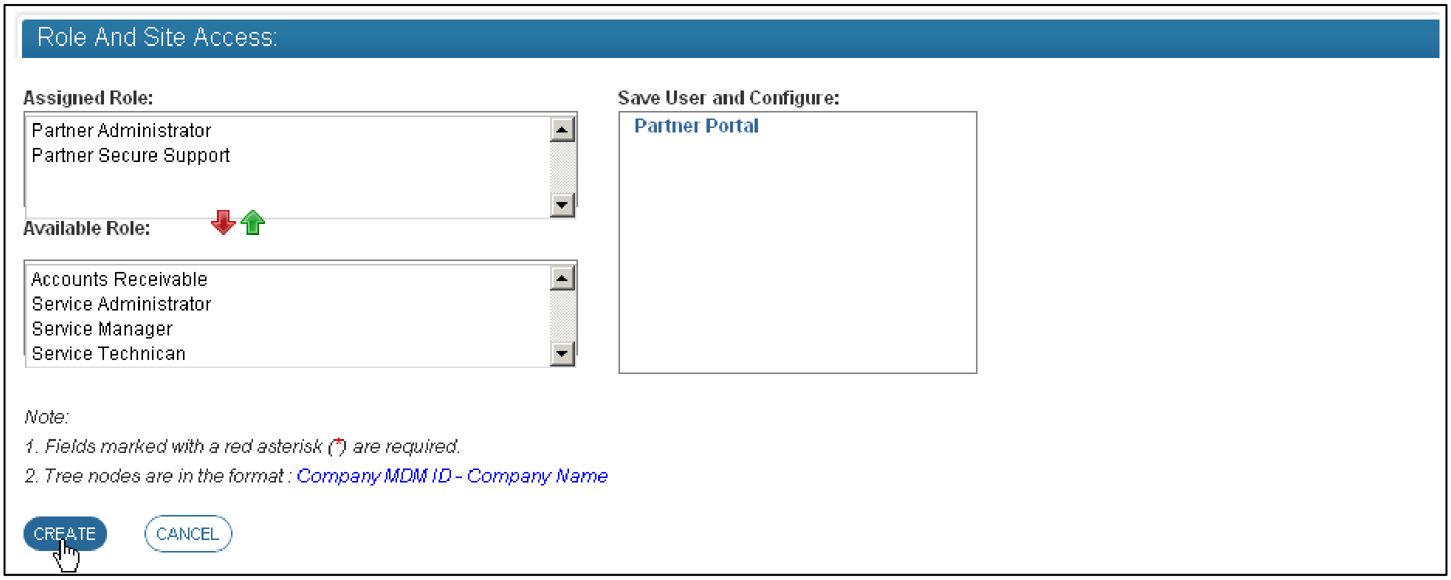
* Not present for all accounts

OPTIONAL STEP:

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

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.

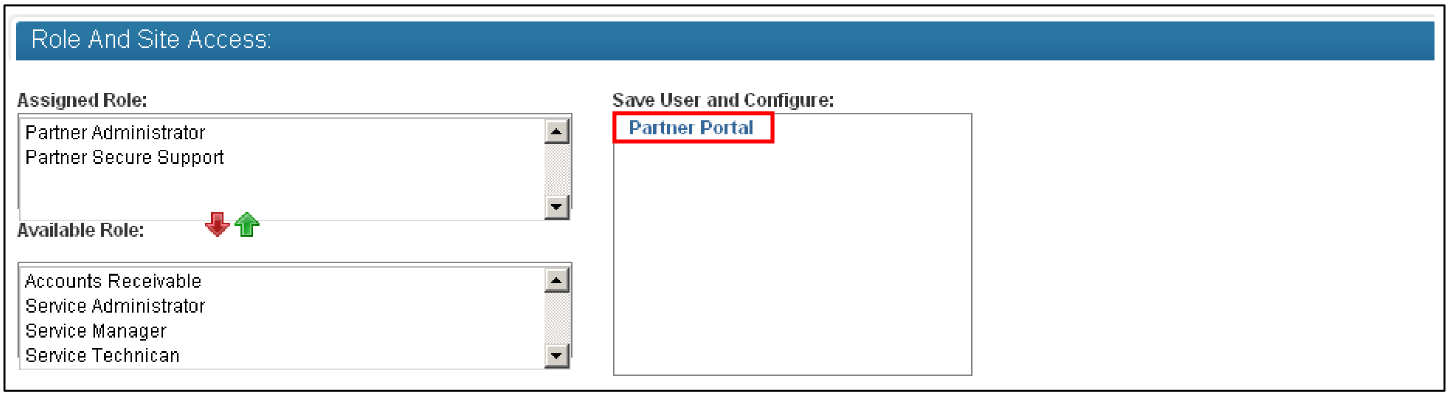


A user's role will determine how many of the different functions will be available to a given user in the Portal (see table). More than one role can be selected by using the Control or Shift key; however, at least one role MUST be selected.

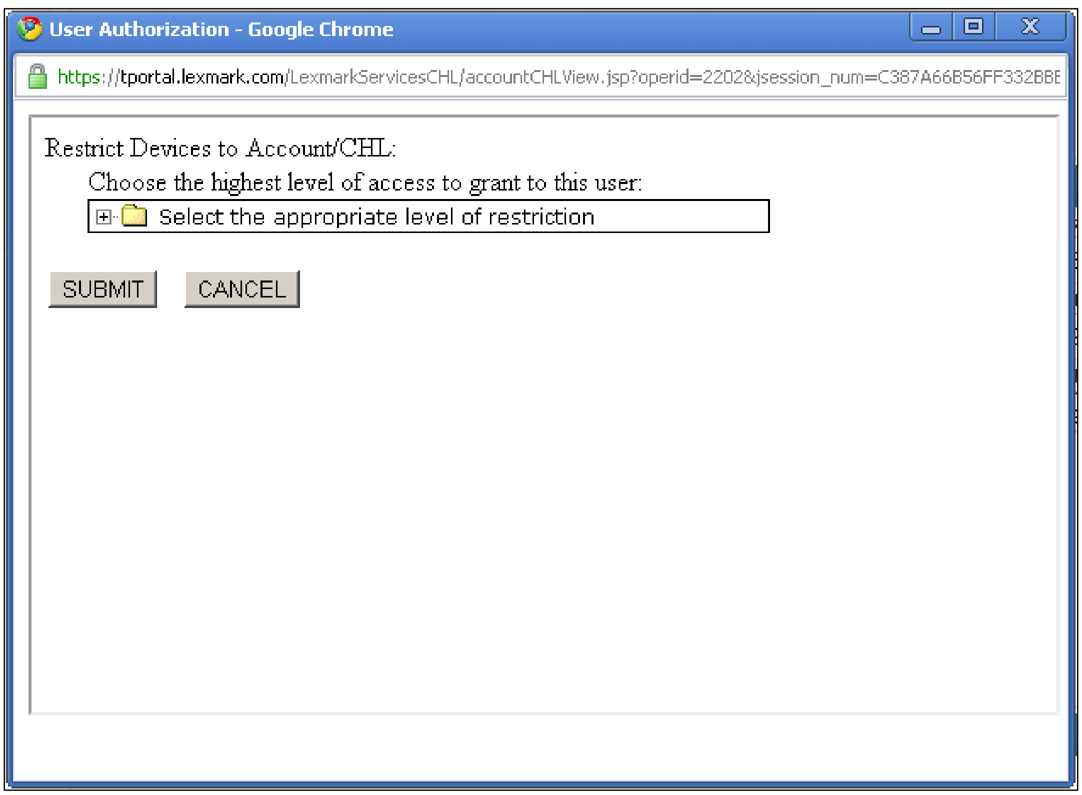
Access & Capabilities by Role	**Home Page**	**Service Requests**	View Service Request	Accept Service Request	Update Service Request	Debrief Service Request	**Payments**	**Reports**	**Document Library**	**Warranty Entitlement**	**User Administration**	**Secure Support & Downloads**
Service Technician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

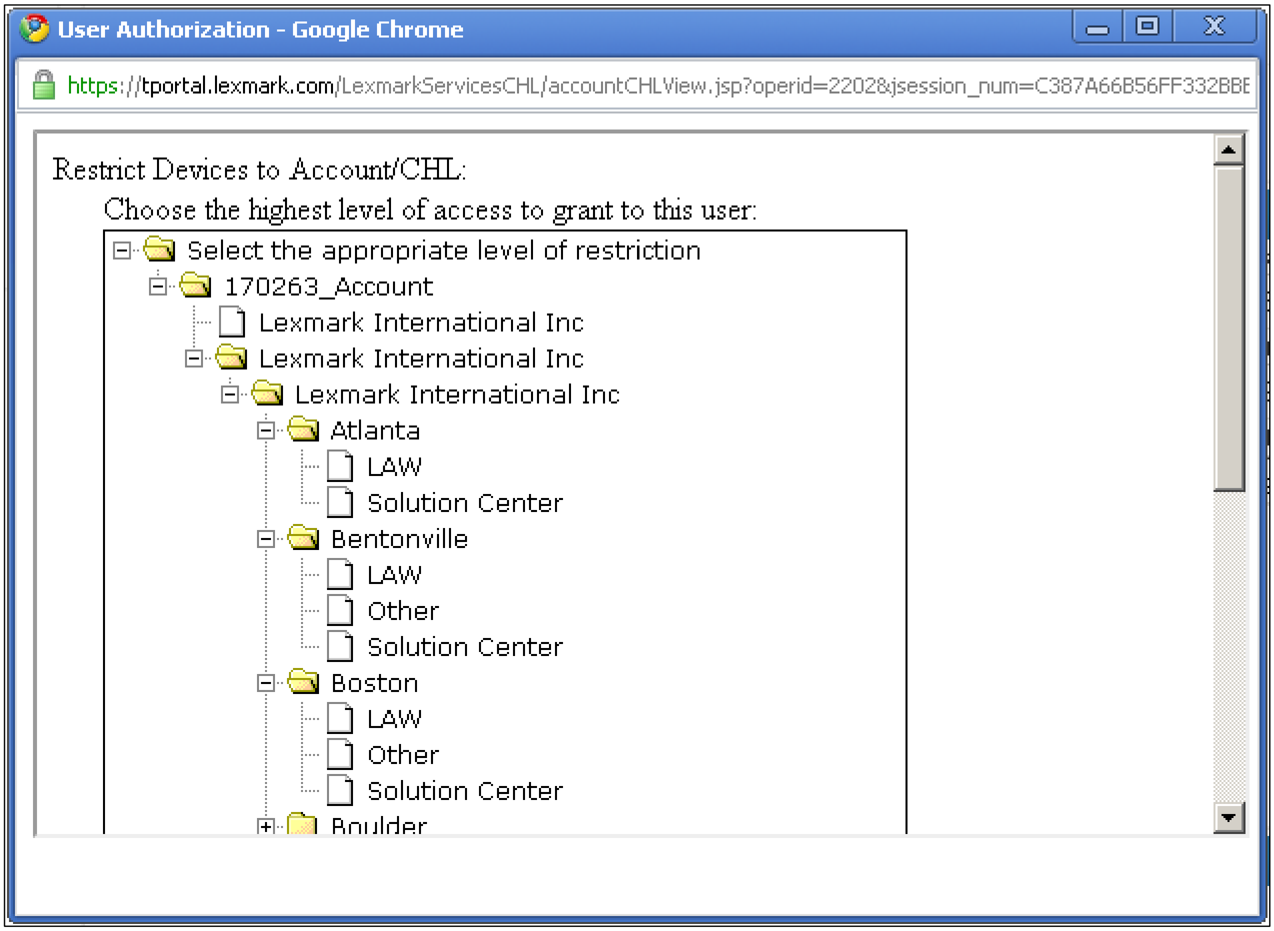
OPTIONAL STEP:

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



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.

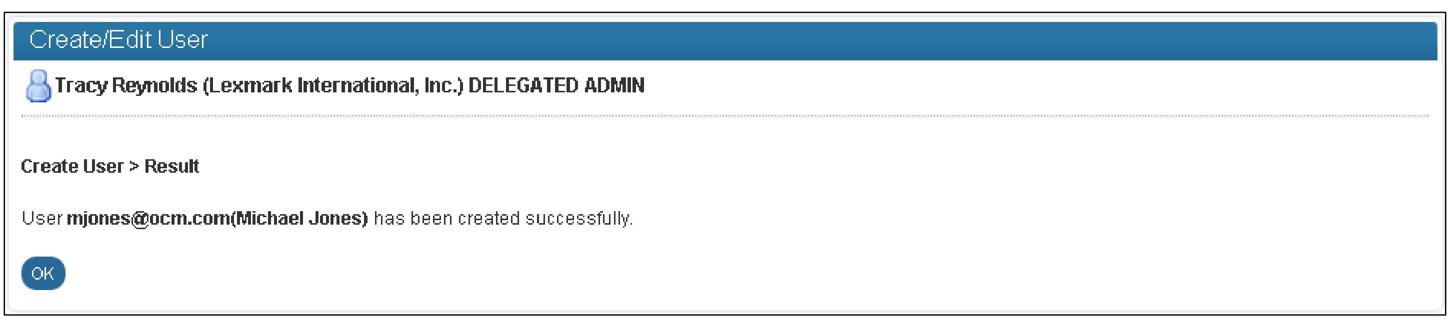




7. Click “Submit.”

8. Click “Save.”

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



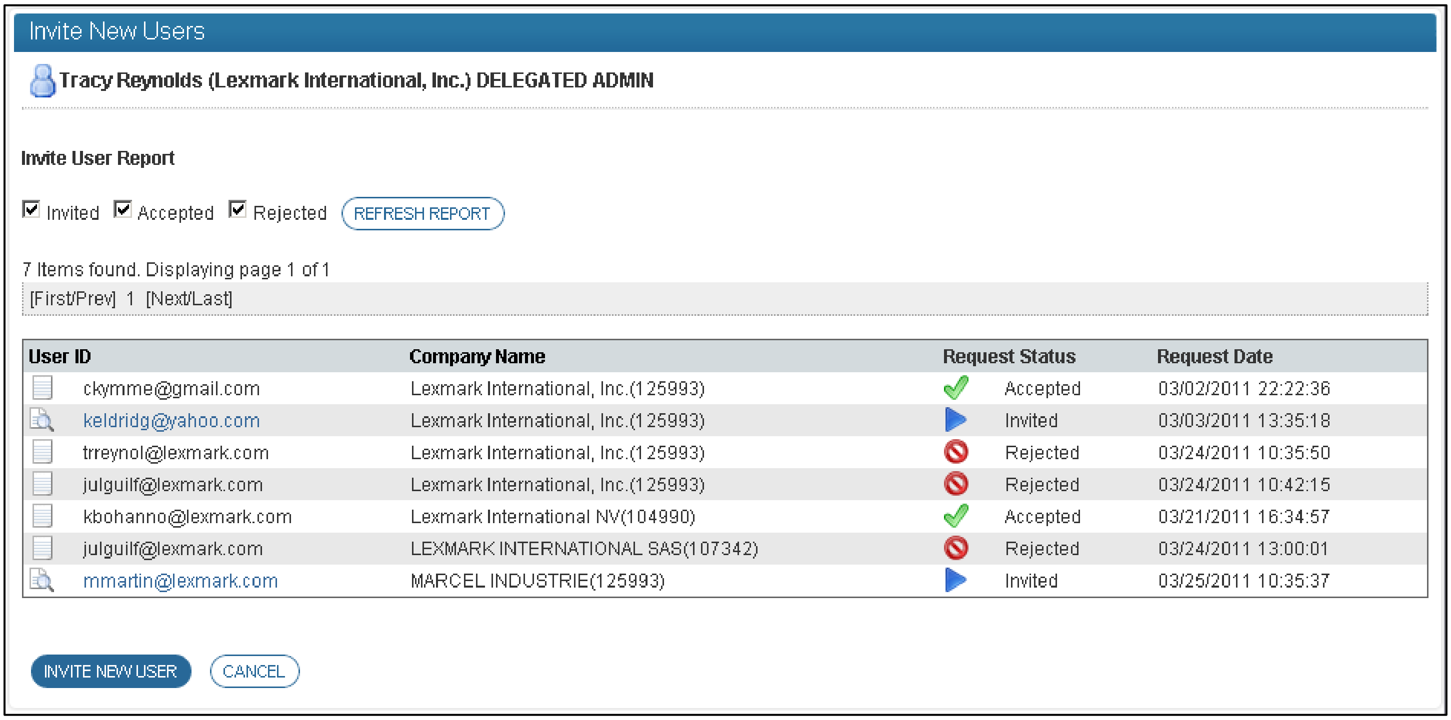
9. The administrator will need to email the user to notify them of their active status in the Portal and to provide the user with their password. It is recommended that the user be advised to change their password upon initial login to the Portal.

Invite New User

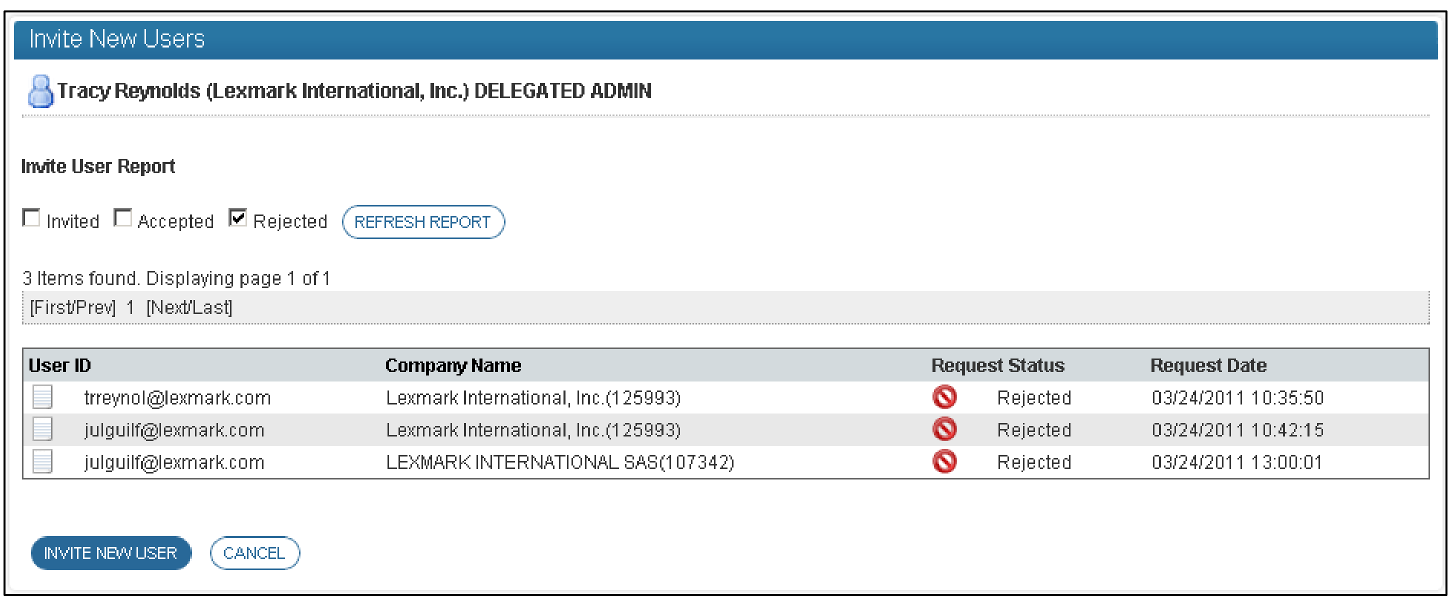
A report option is available under "Invite New Users." This report allows you to view all users who have been sent invitations, as well as the status of each user. The status options include:

- **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.

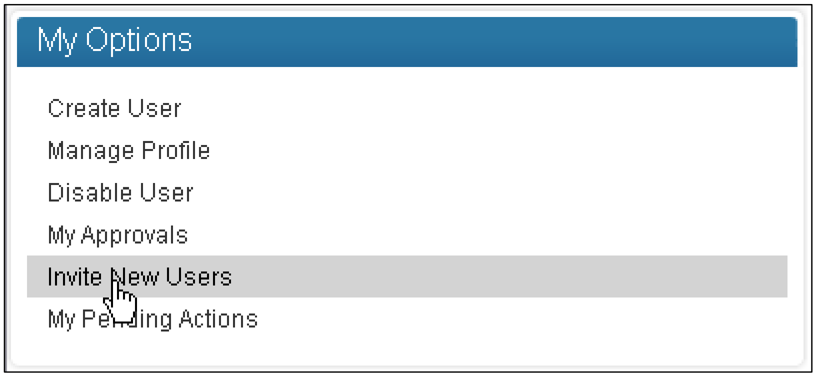


Customized report:

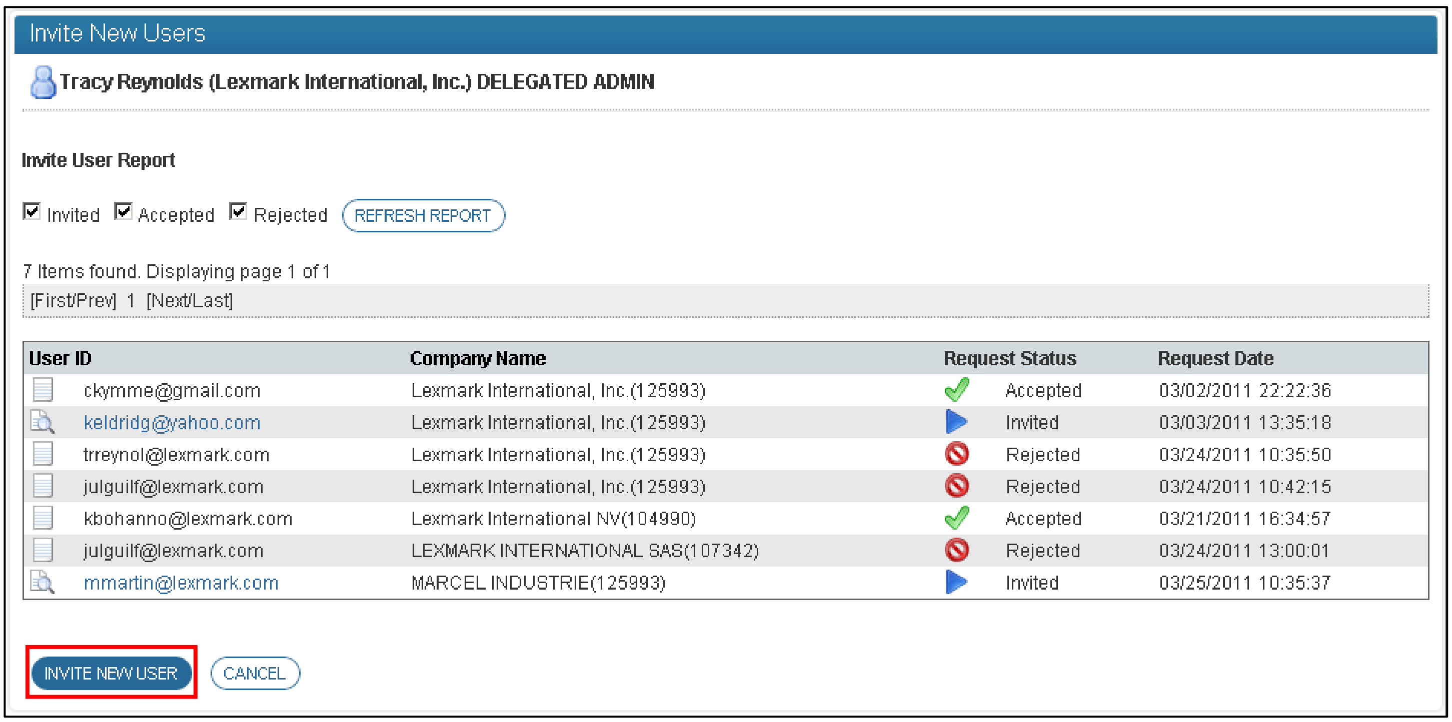


How to Invite a User

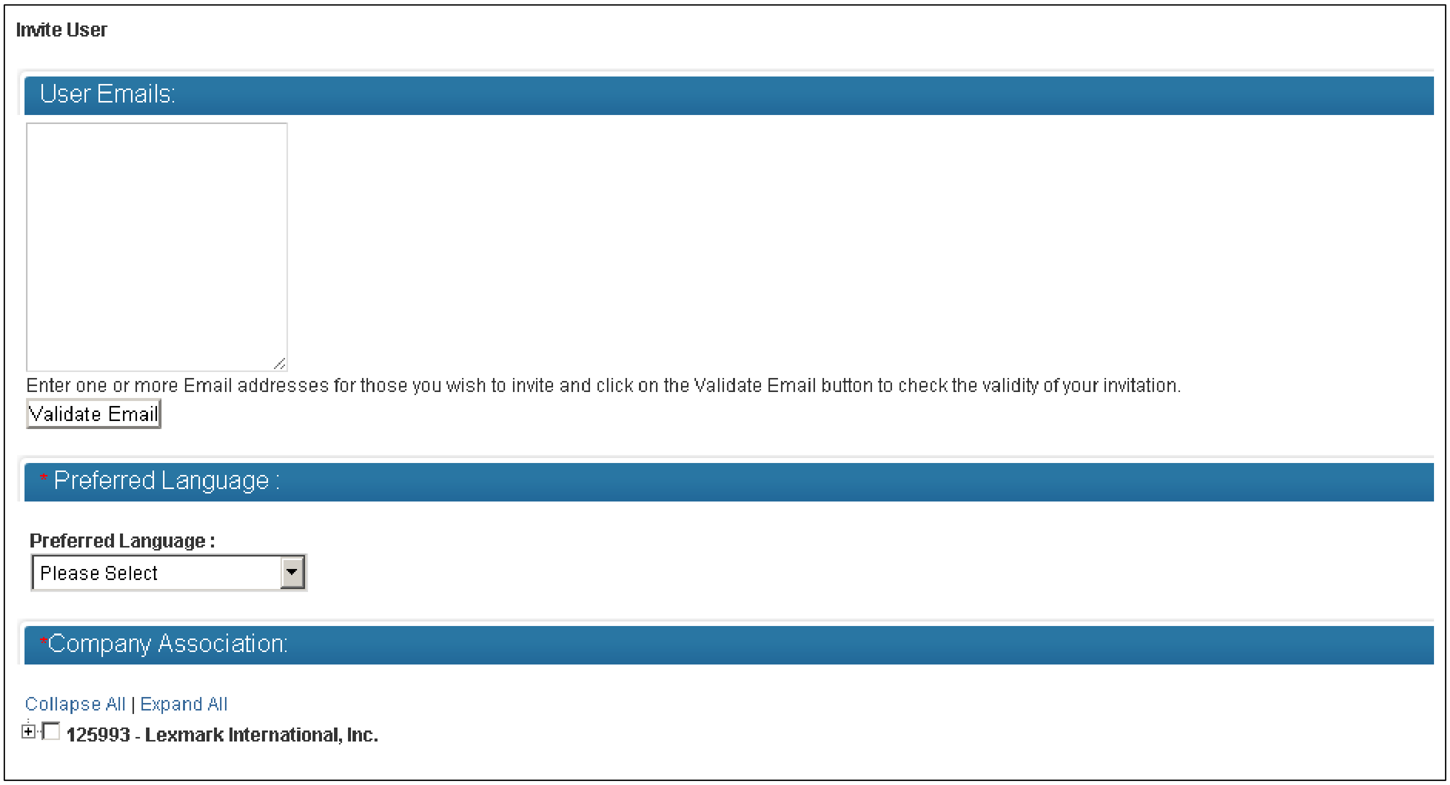
1. Click on “Invite New Users” in the “My Options” menu.



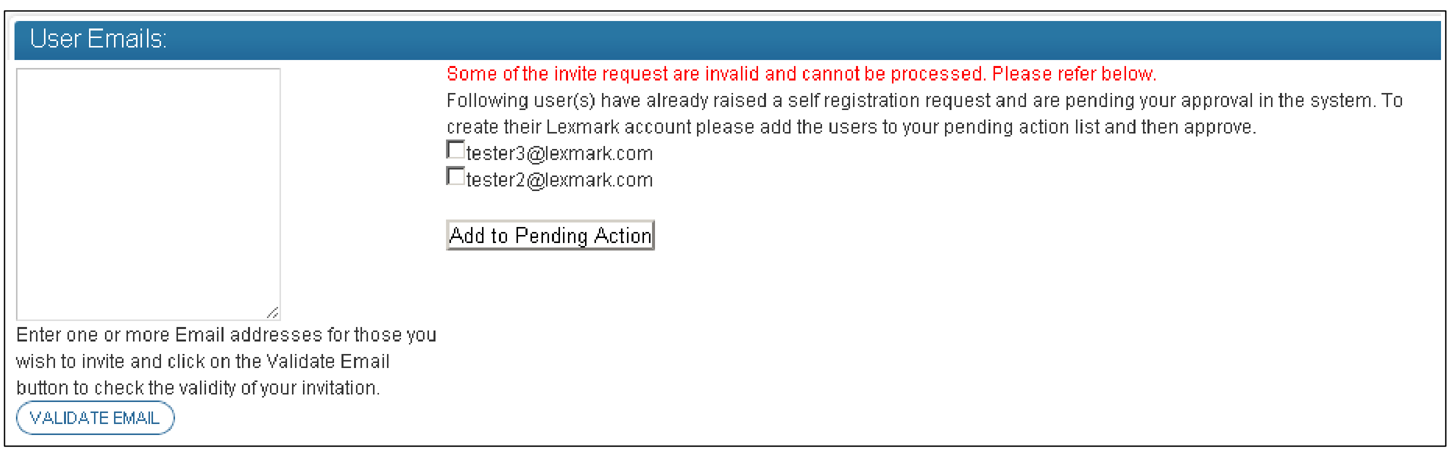
2. Click “Invite New User.”



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

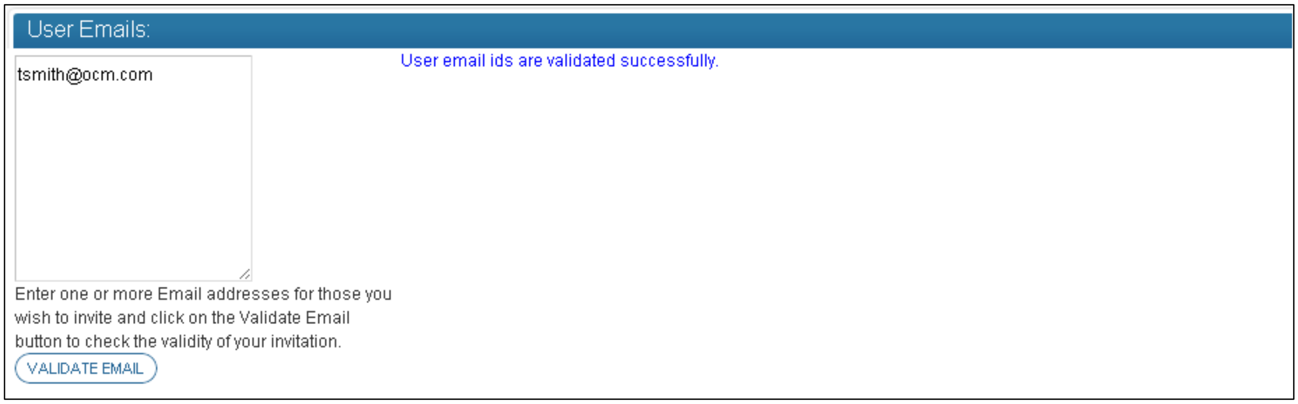


Users who have already self-registered (but are still awaiting approval) cannot also be invited to join the Portal. Attempting to invite a user who has a pending self-registration request will result in an error message. You will have the option to move the request to your "My Pending Actions" list. 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.



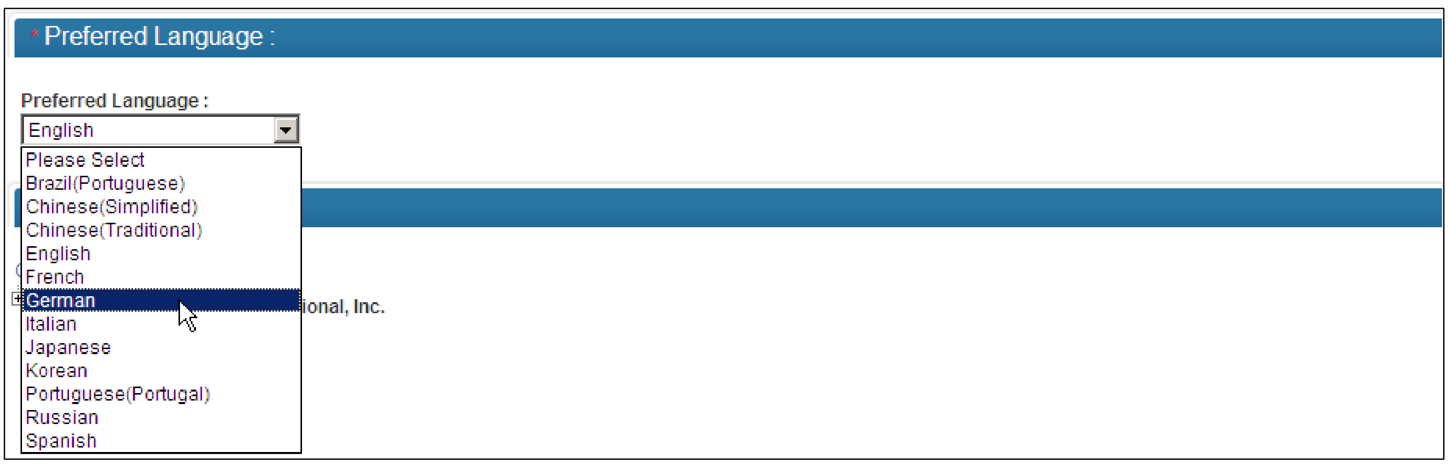
4. Click "Validate Email" to verify the validity of the email address(es). Valid email addresses must be in the correct format (name@site.com) and cannot already exist in the Portal.

Valid email address:

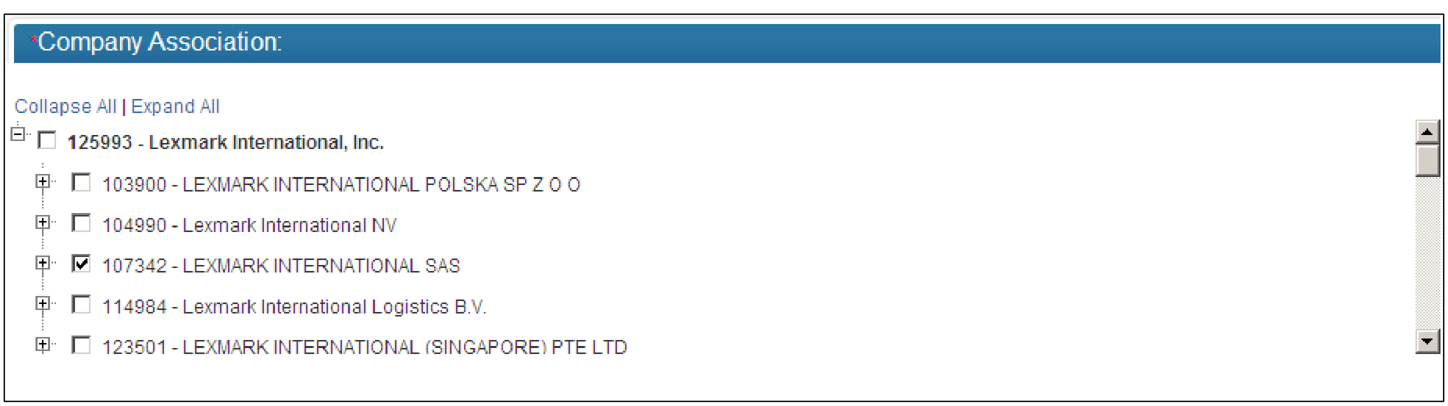


An error message will appear if the email address is invalid or if the email address already exists in the Portal.

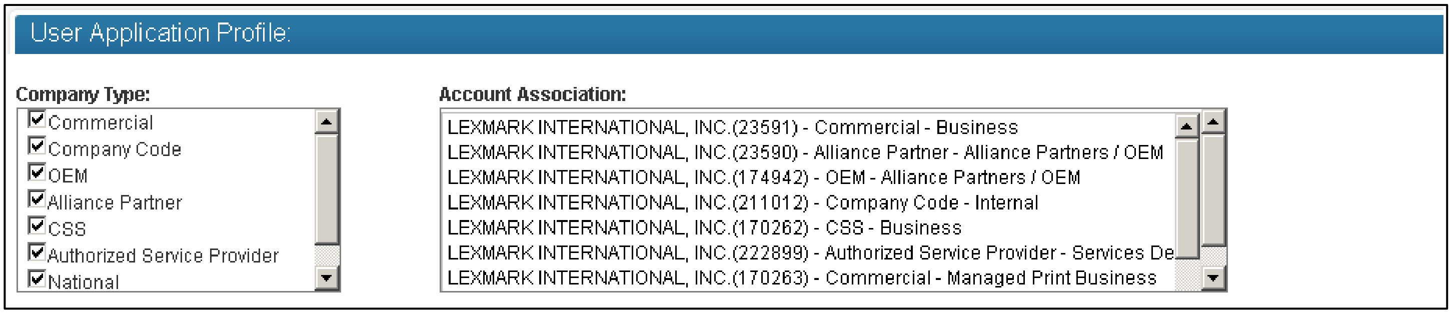
5. Choose the preferred language from the drop-down menu. This will determine the language used in the email sent to the user(s) inviting them to register, as well as the language in their personal view of the Portal.



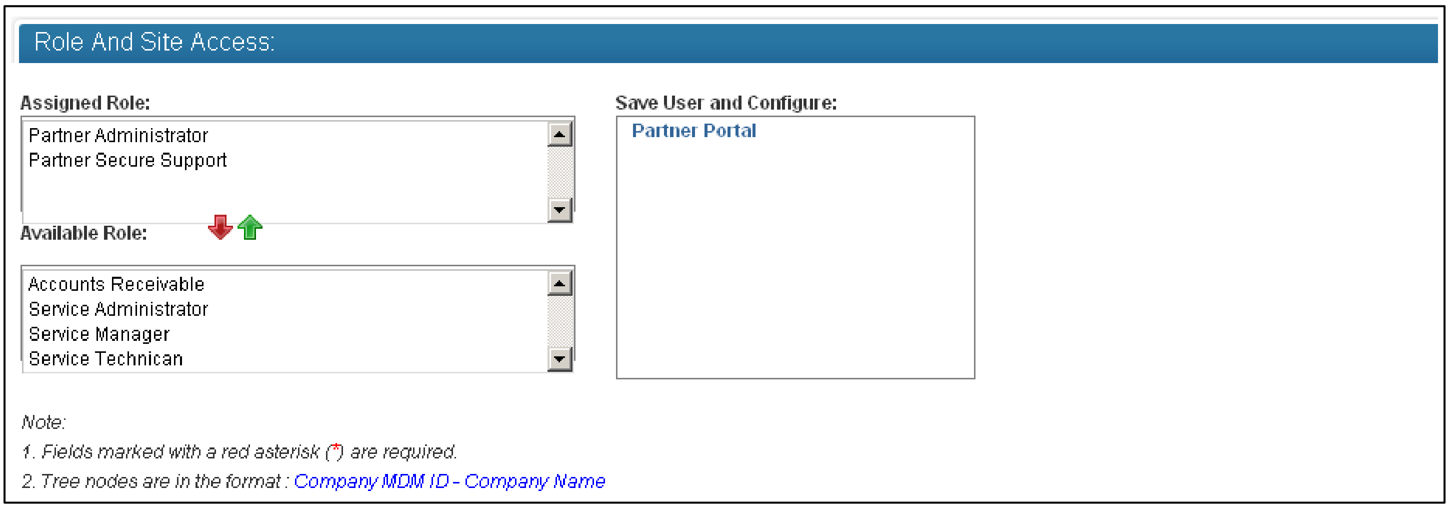
6. Under "Company Association", choose the company to which you would like to assign the user by placing a checkmark in the box next to the company name (see page 8 for more information on assigning a user to a company).



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).

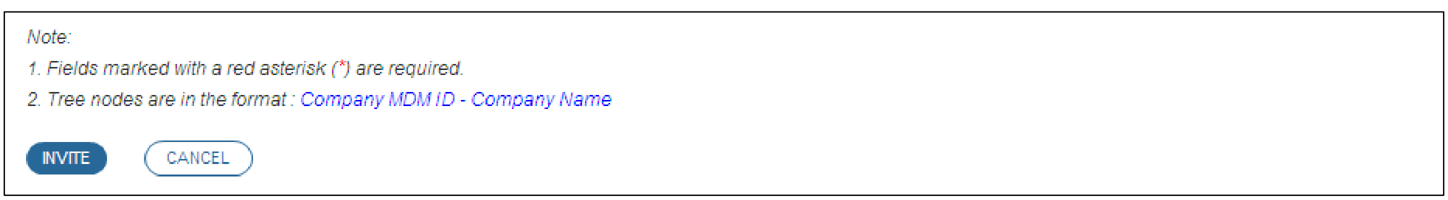


8. Determine the user's role and site access (see pages 9-11 for more information on assigning a user's role and site access).

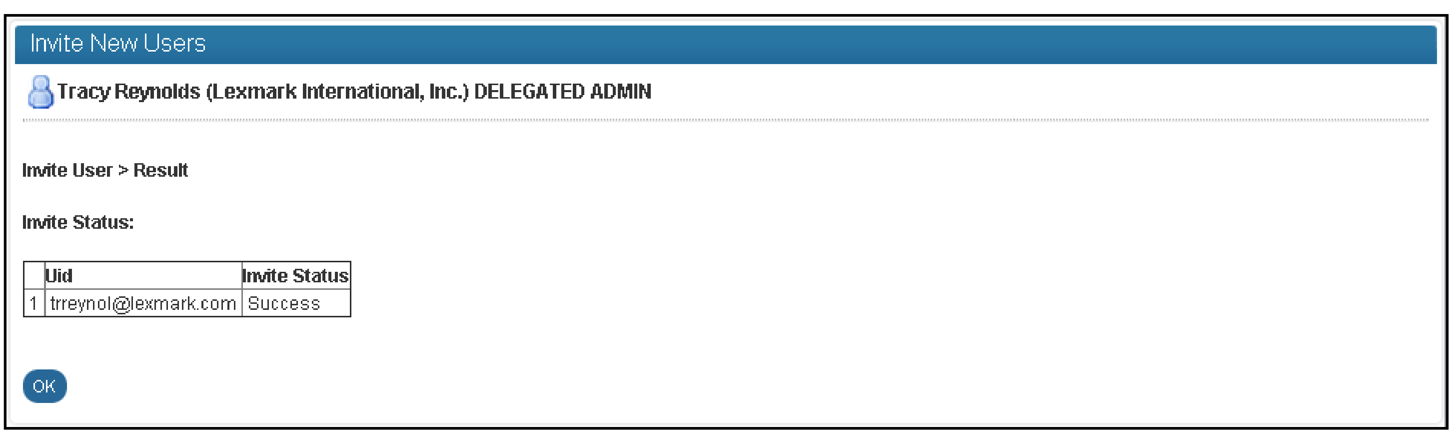


Highlight the role(s) you wish to assign to the user by clicking on the role(s). Multiple selections can be made by using the Control or Shift key. Move the role(s) to the "Assigned Role" box by clicking the green arrow.

9. Click "Invite."



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



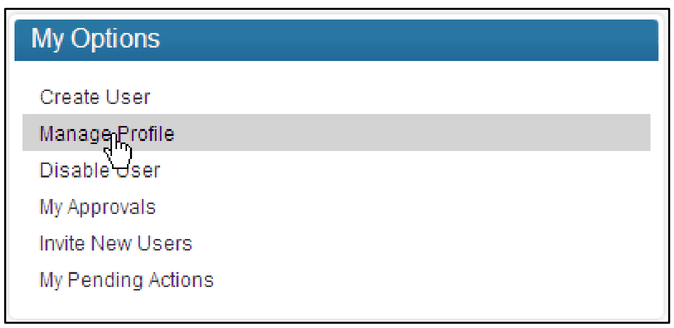
Manage Profile

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

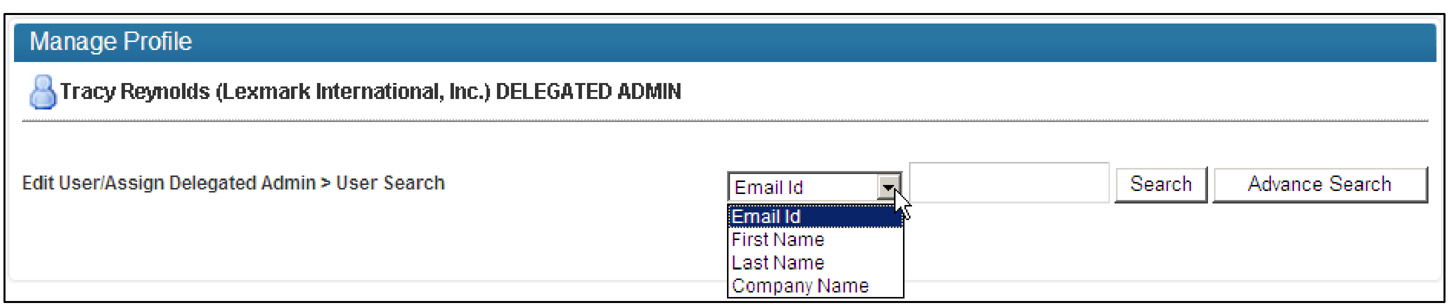
How to Update a User's Profile

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

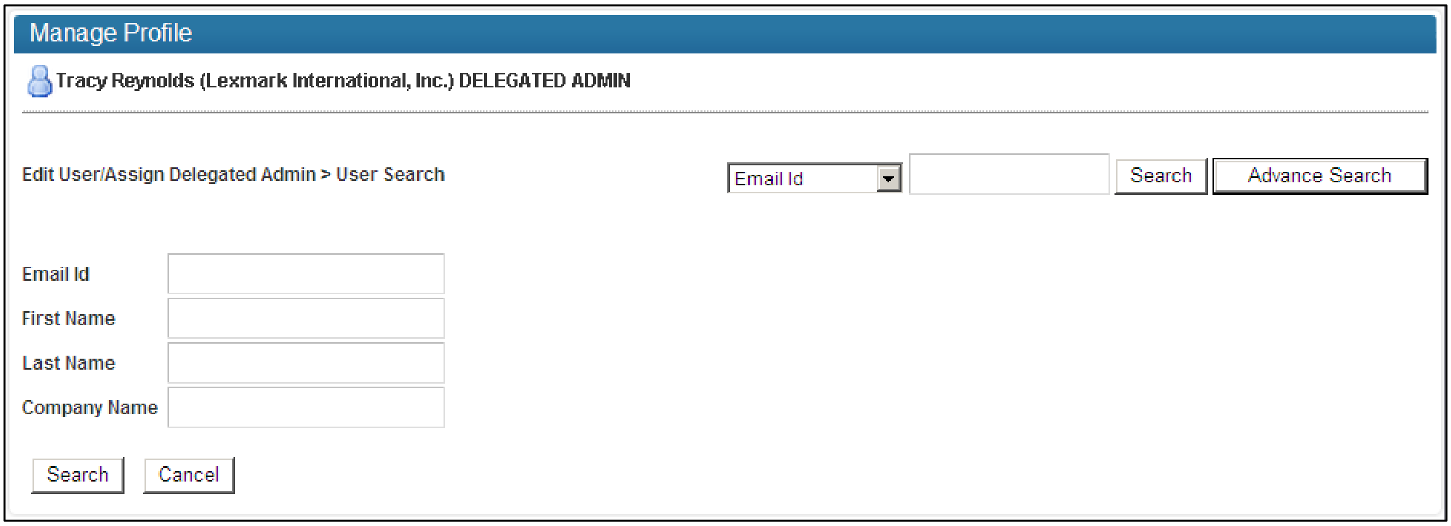


2. Search for the user using one of the following methods:

   a. The standard search option allows you to enter one of four possible criteria: email ID, first name, last name, or company name.

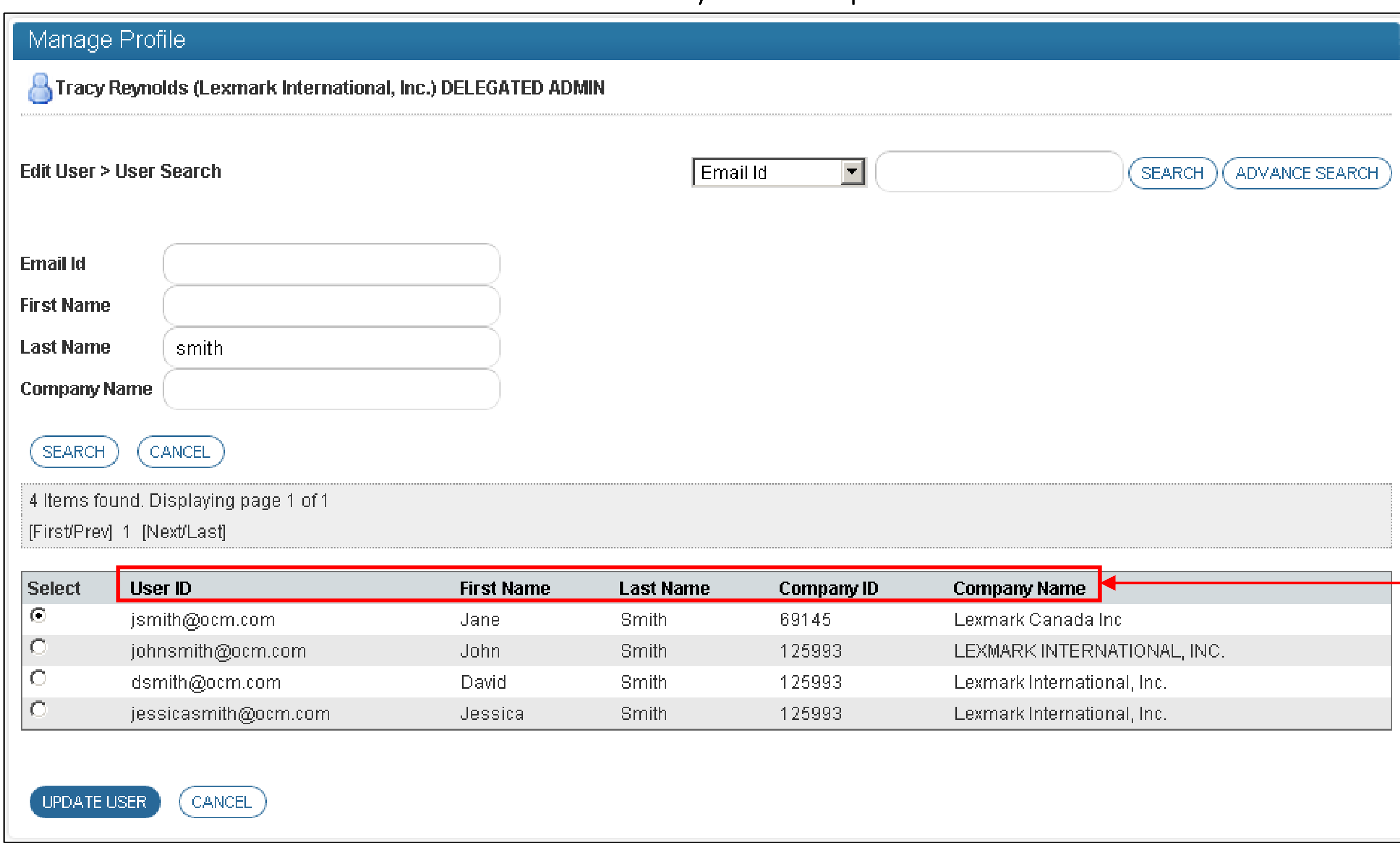


b. Click “Advance Search” to enter multiple criteria in the search options. Providing at least one criterion is mandatory.

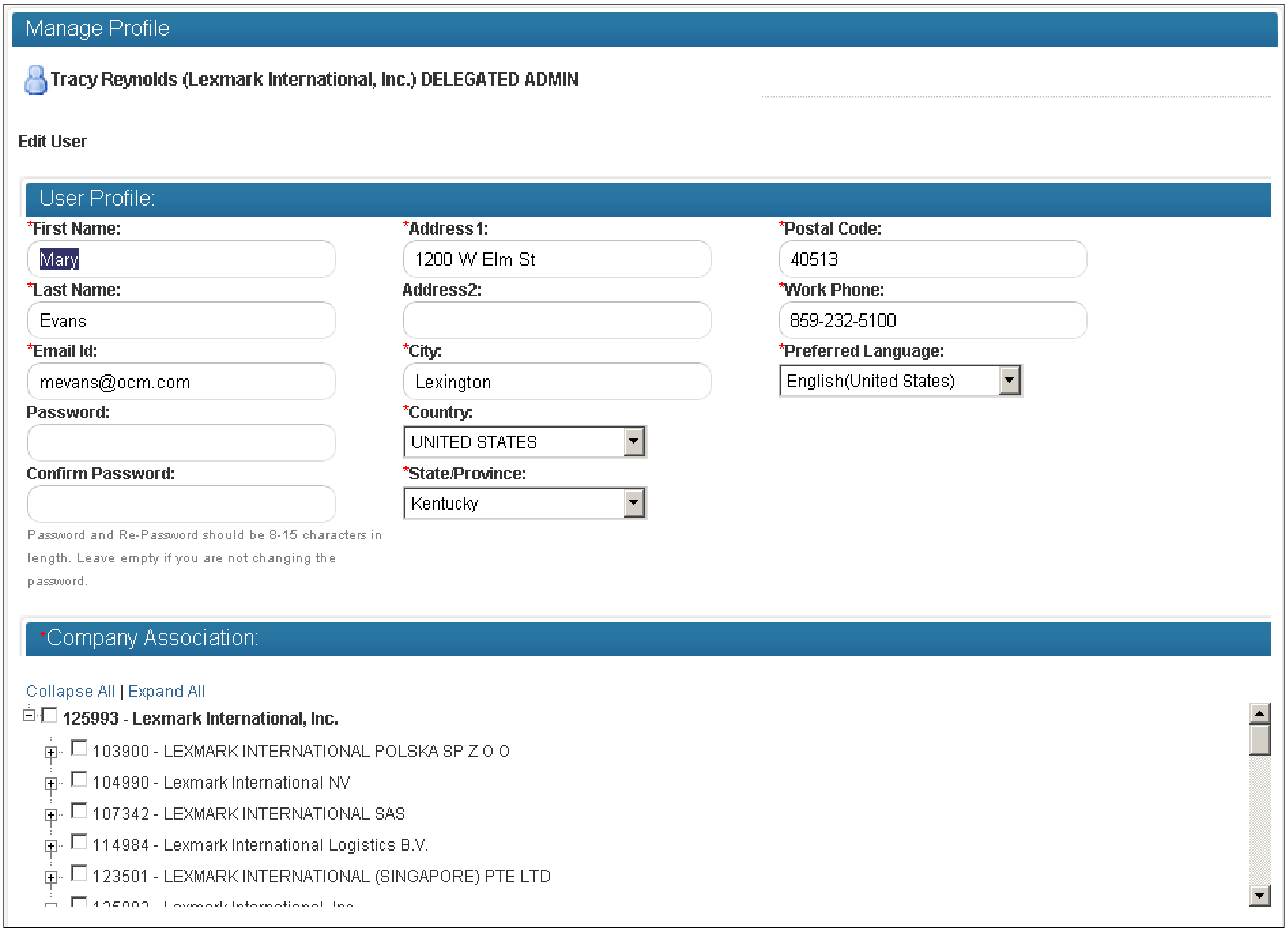


3. Click “Search.”

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.



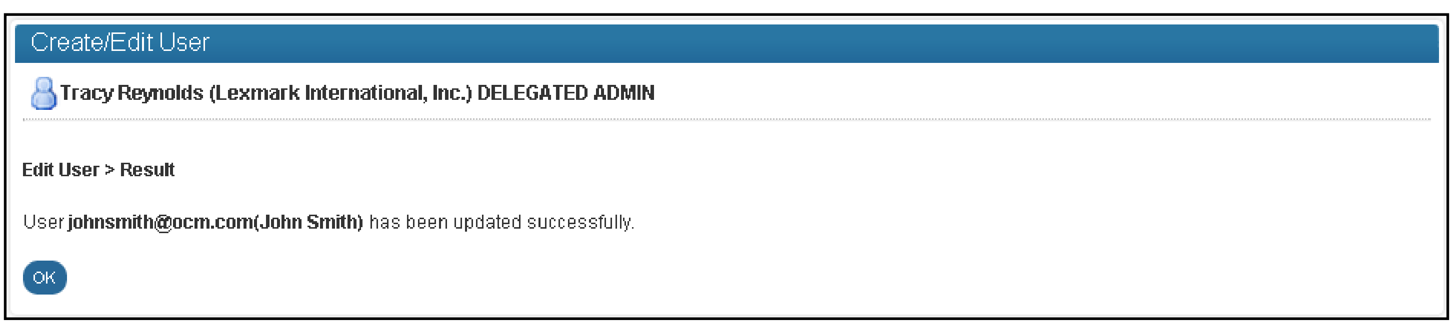
5. Click “Update User.”



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.



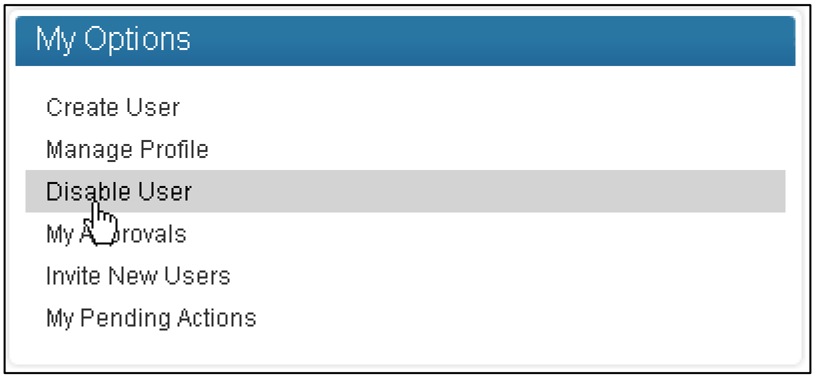
8. Click “OK” to return to the “My Options” menu.

Removing Users

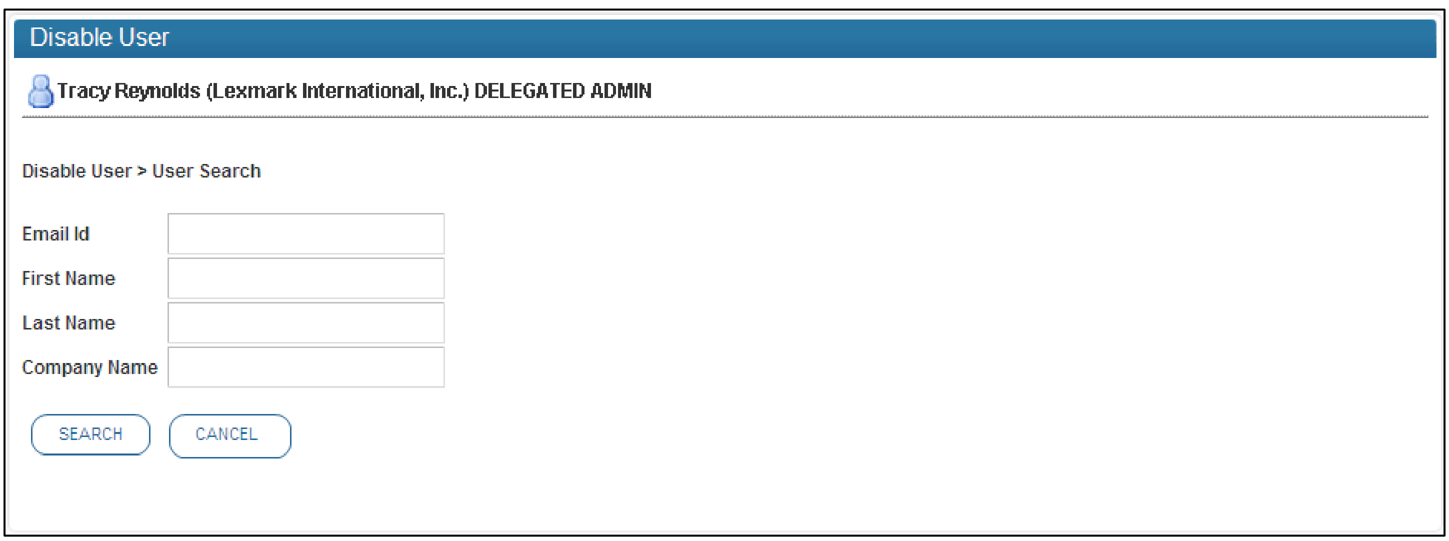
Delegated Administrators can disable user accounts that are registered with companies that they manage. Disabling a user will delete the user profile and they will no longer be able to access the Portal.

How to Disable a User

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

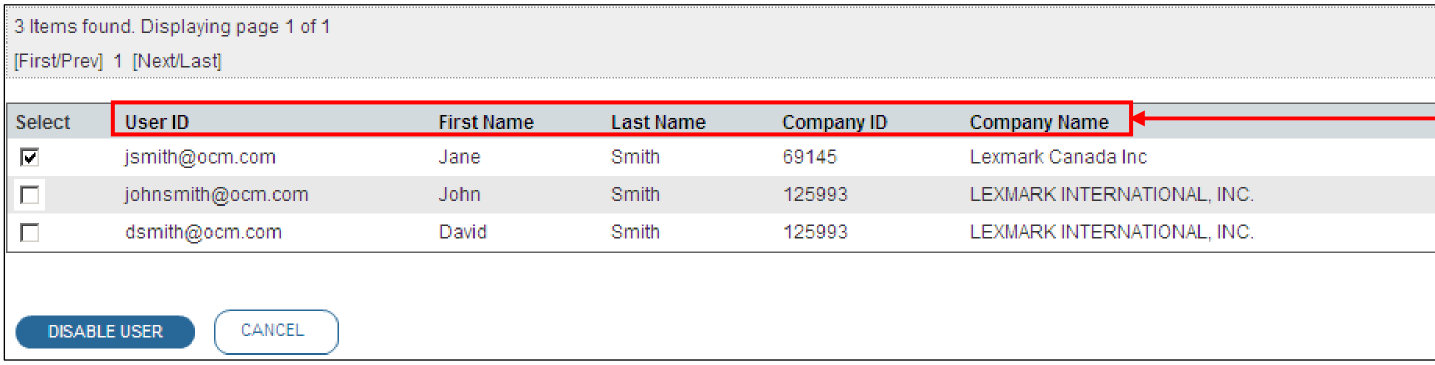


2. Search for the user you wish to disable using any of the criteria as shown below:

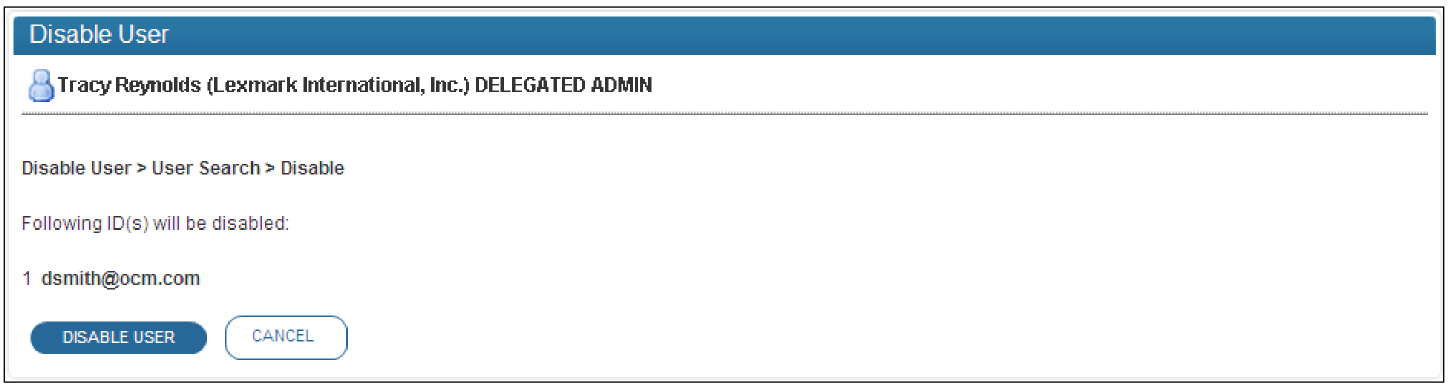


You must enter at least one letter in at least one of the fields above. Entering information in more than one field will help narrow the search results.

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.

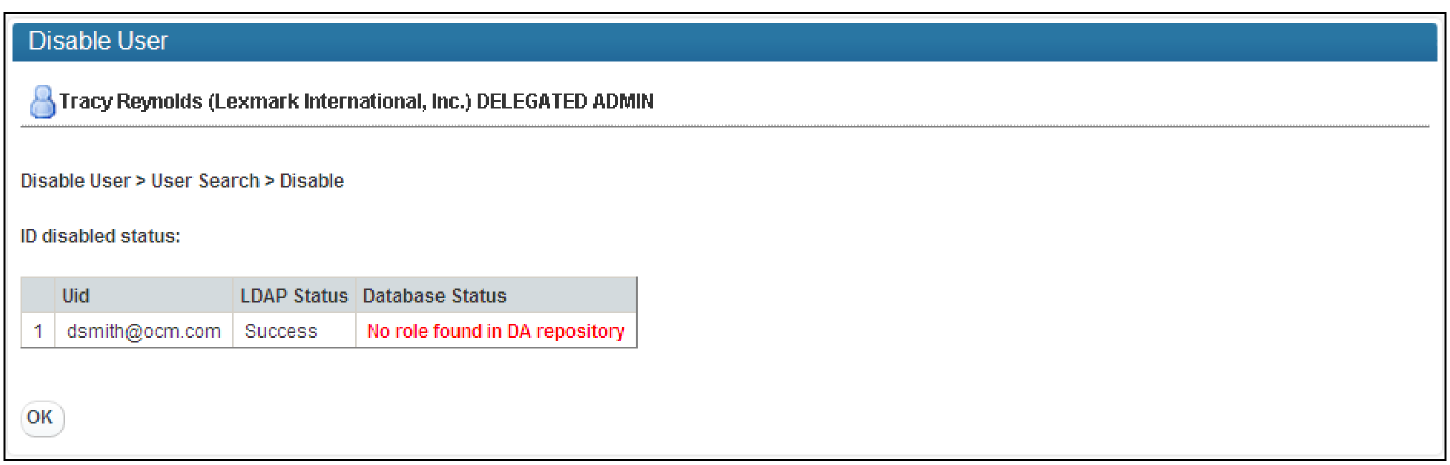


4. Click “Disable User.”



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.”



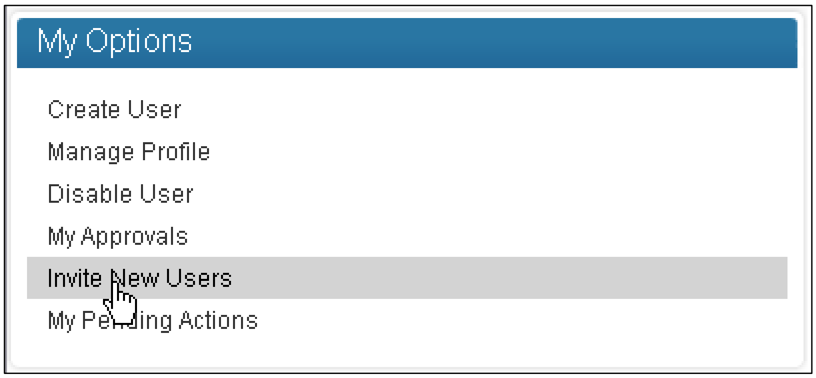
6. Click “OK” to return to the “My Options” menu.

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

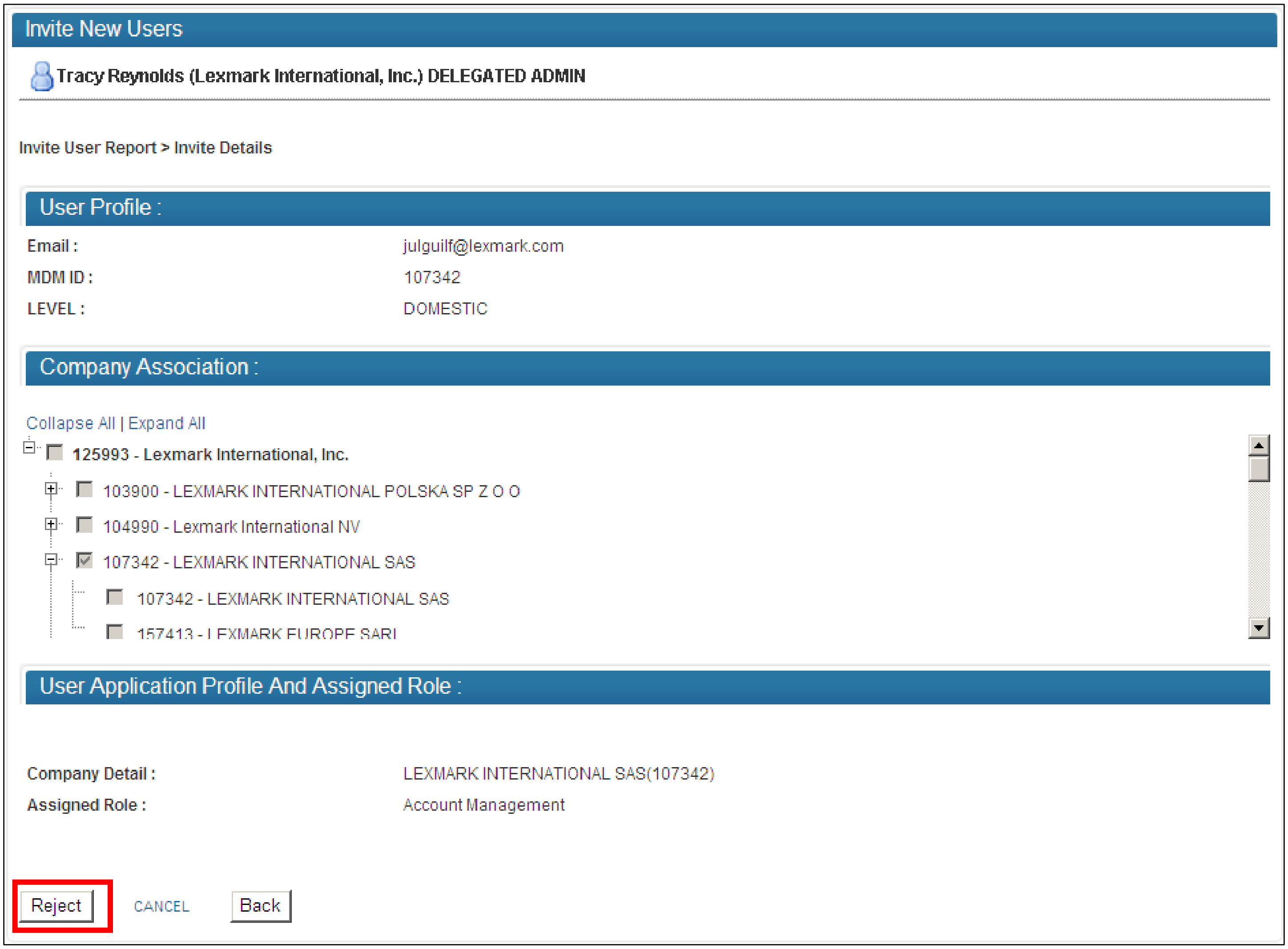
1. Click on “Invite New Users” in the “My Options” menu.



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

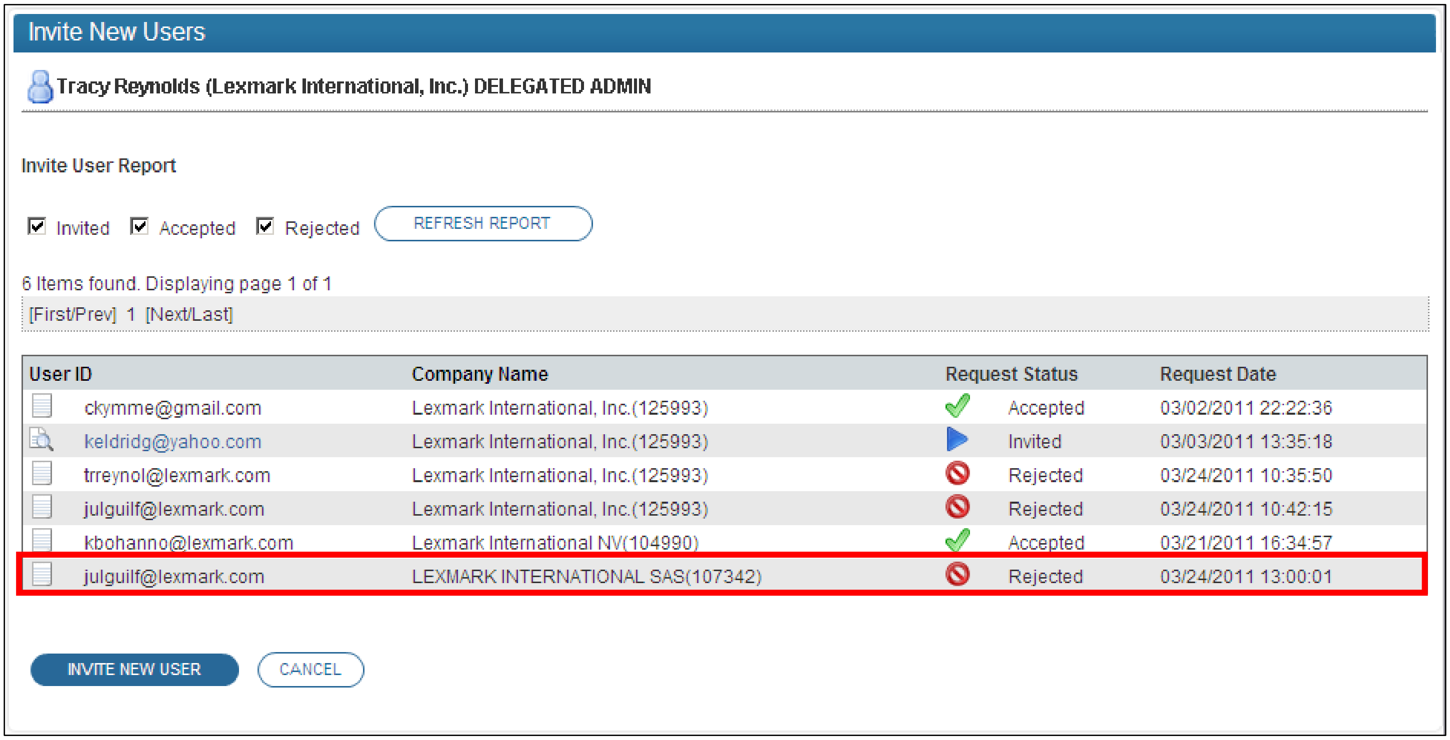
3. A summary screen will be displayed which shows the details of the invitation. Scroll to the bottom of the screen.



4. Click on “Reject.”

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

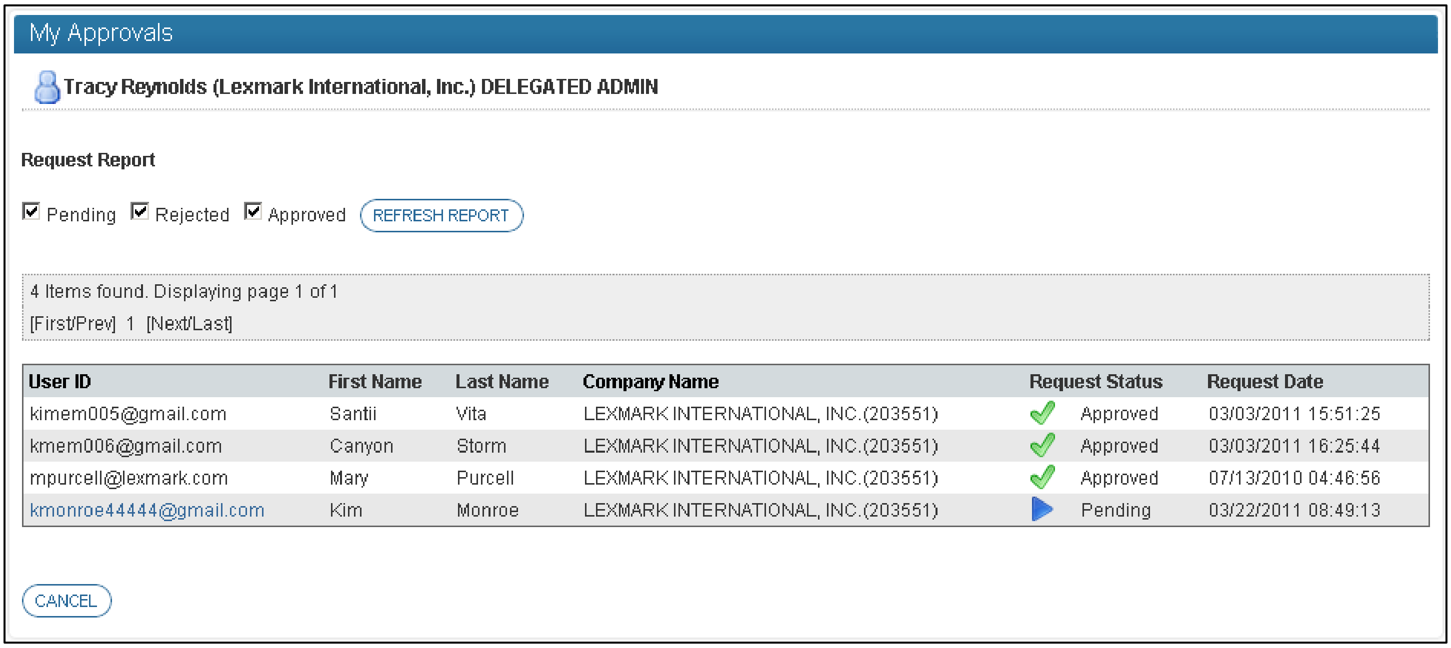
Once you have rejected an invited user, the “Request Status” of that user will be displayed as “Rejected.” This can be viewed by clicking on “Invite New Users” in the “My Options” menu.



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

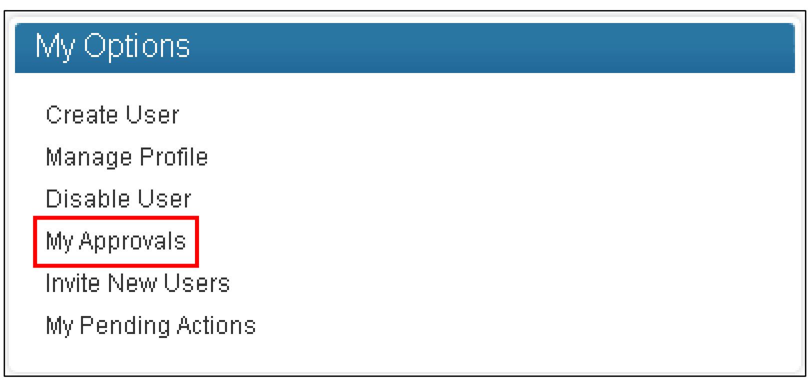
[First/Prev] 1 [Next/Last]

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

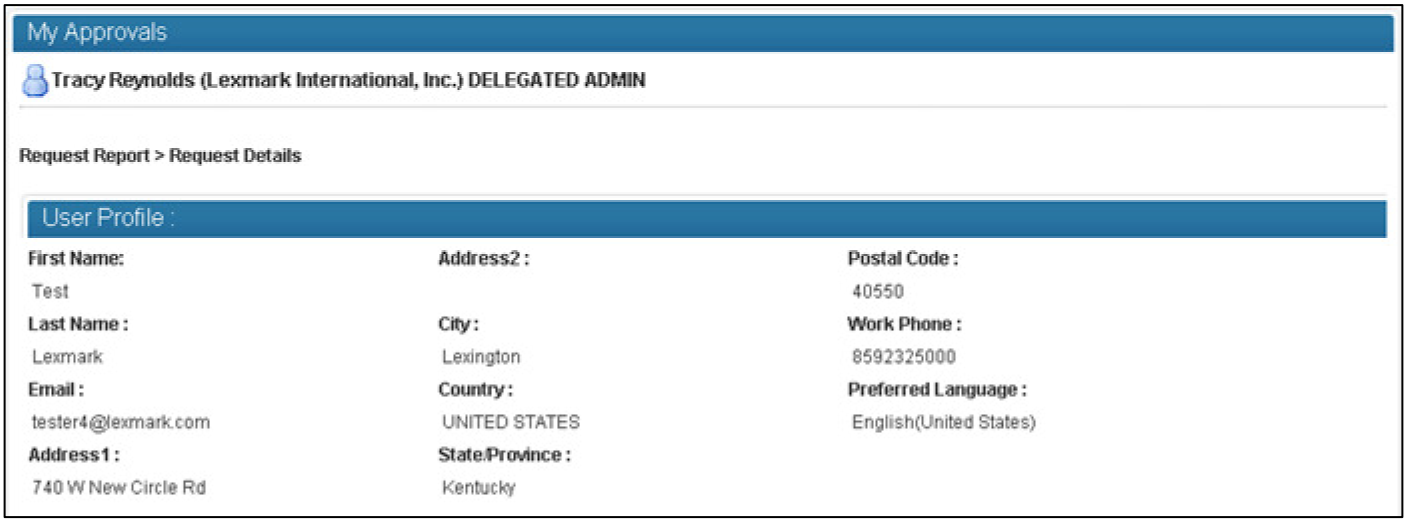
CANCEL

How to Approve a Pending Request

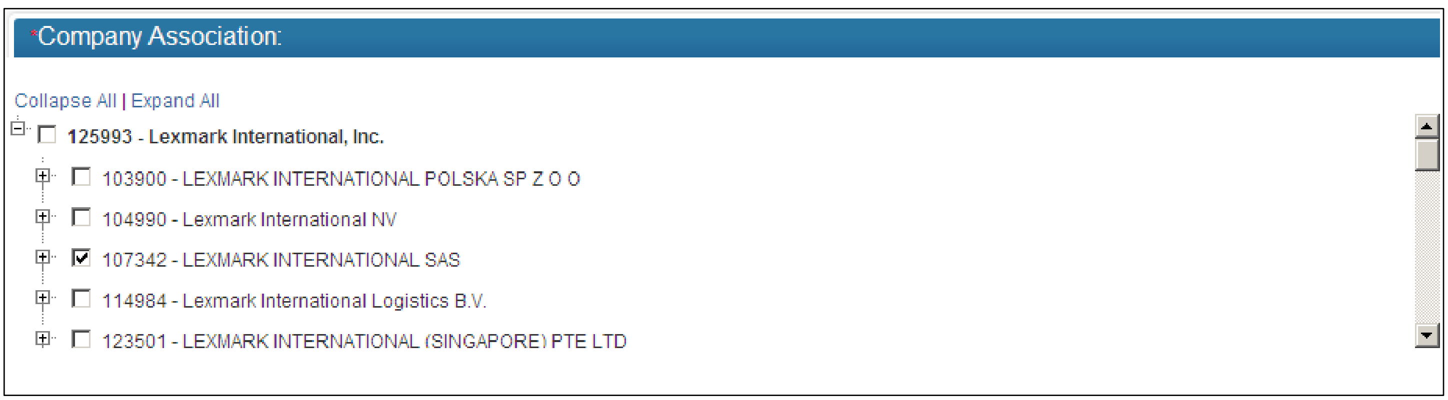
1. Click on "My Approvals" in the "My Options" menu.



2. 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.

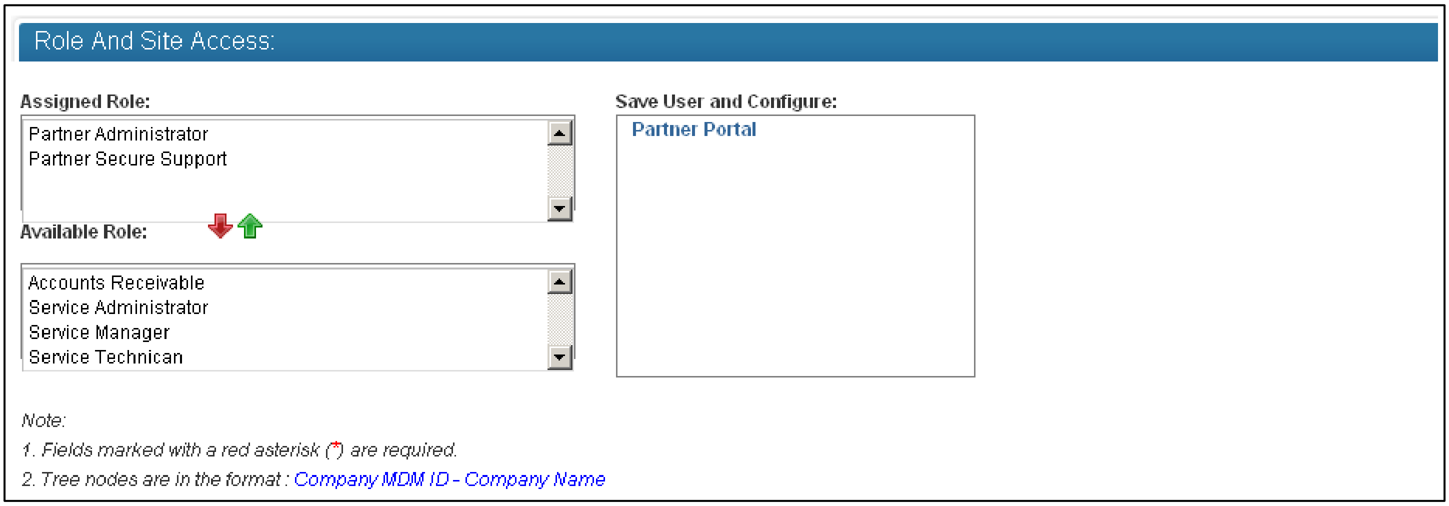


3. Under "Company Association", choose the company to which you would like to assign the user by placing a checkmark in the box next to the company name (see page 8 for more information on assigning a user to a company).



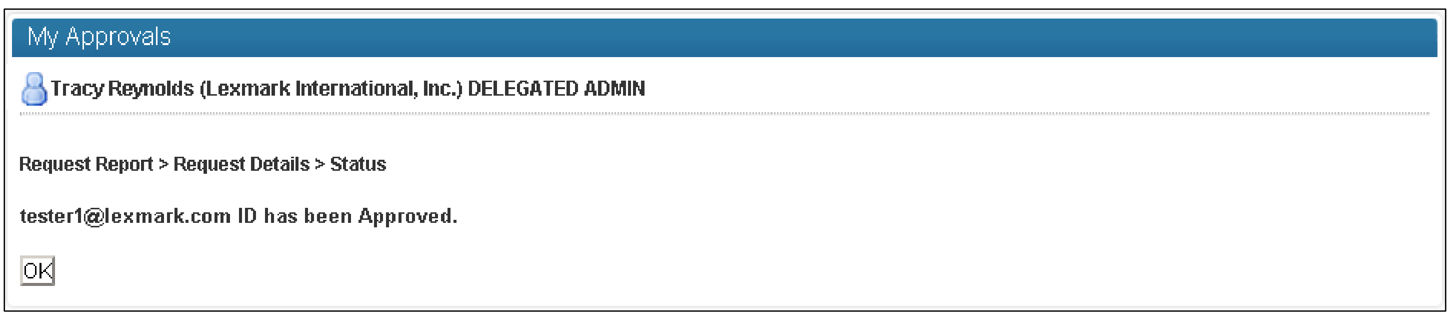
4. Assign the user to an account association (if applicable) by selecting one or more of the accounts available under "Account Association" (see page 8 for more information on account association).

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.



6. Click “Approve.”

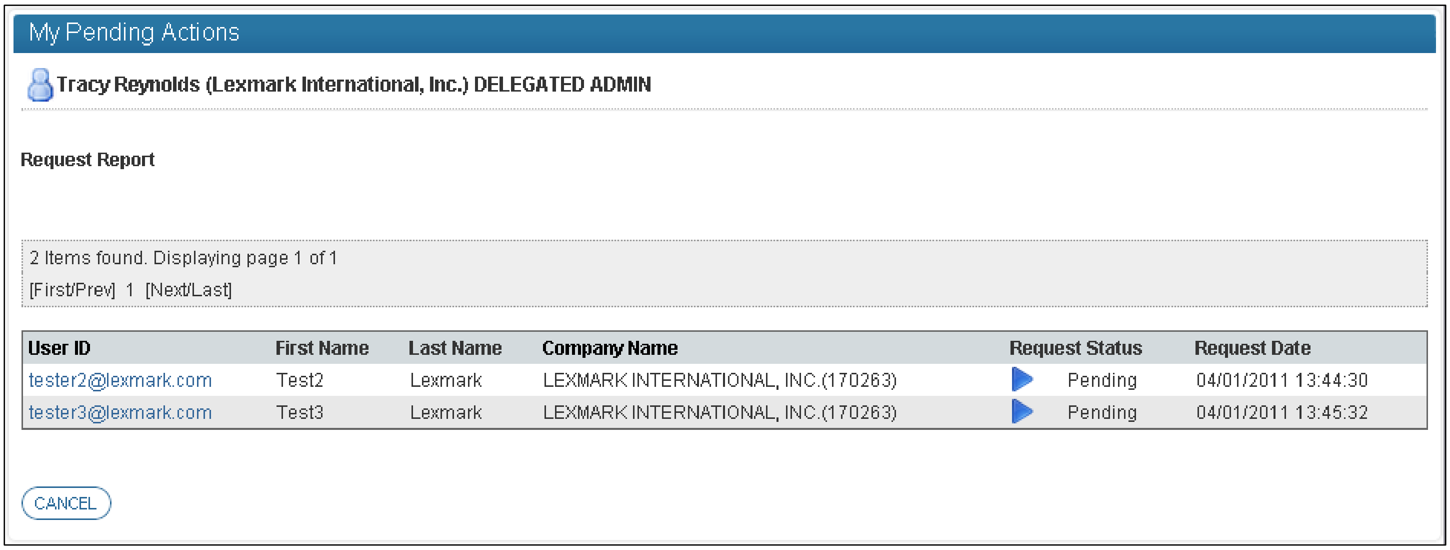
7. A confirmation screen will be displayed. Click “OK” to return to the “My Options” menu.



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

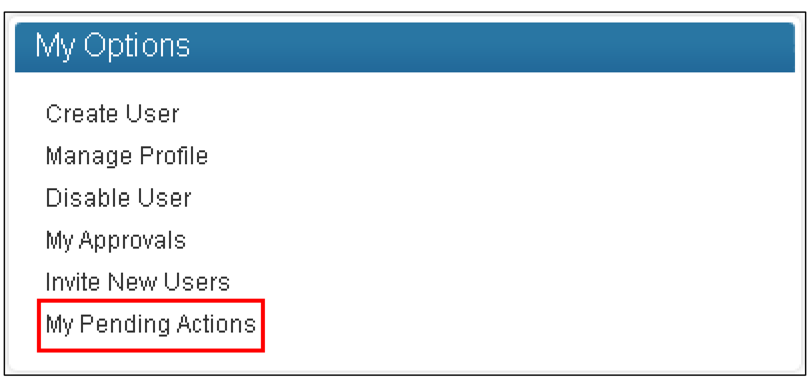
2 Items found. Displaying page 1 of 1
[First/Prev] 1 [Next/Last]

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

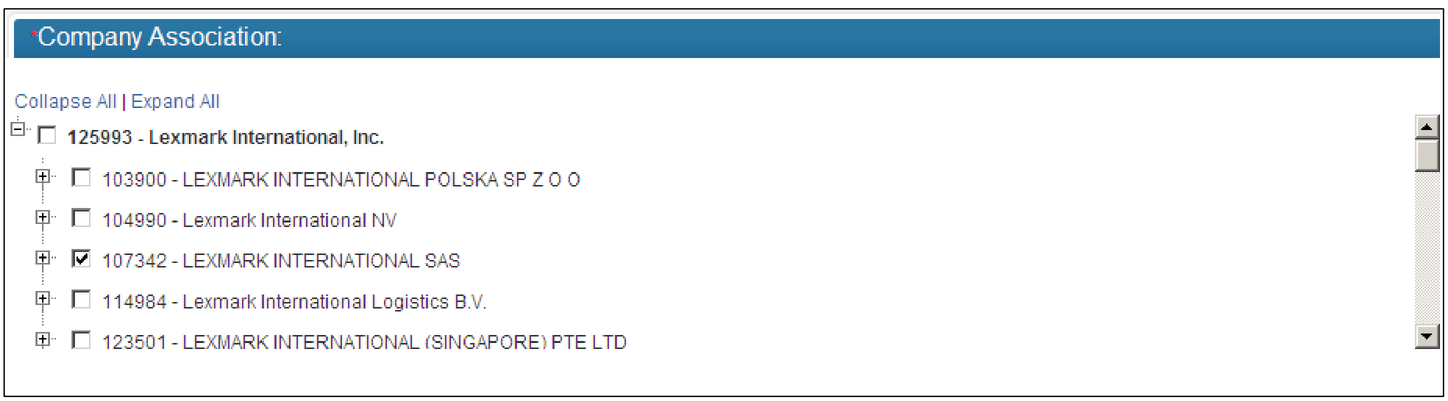
How to Approve a Pending Action

1. Click on "My Pending Actions" in the "My Options" menu.



2. 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.

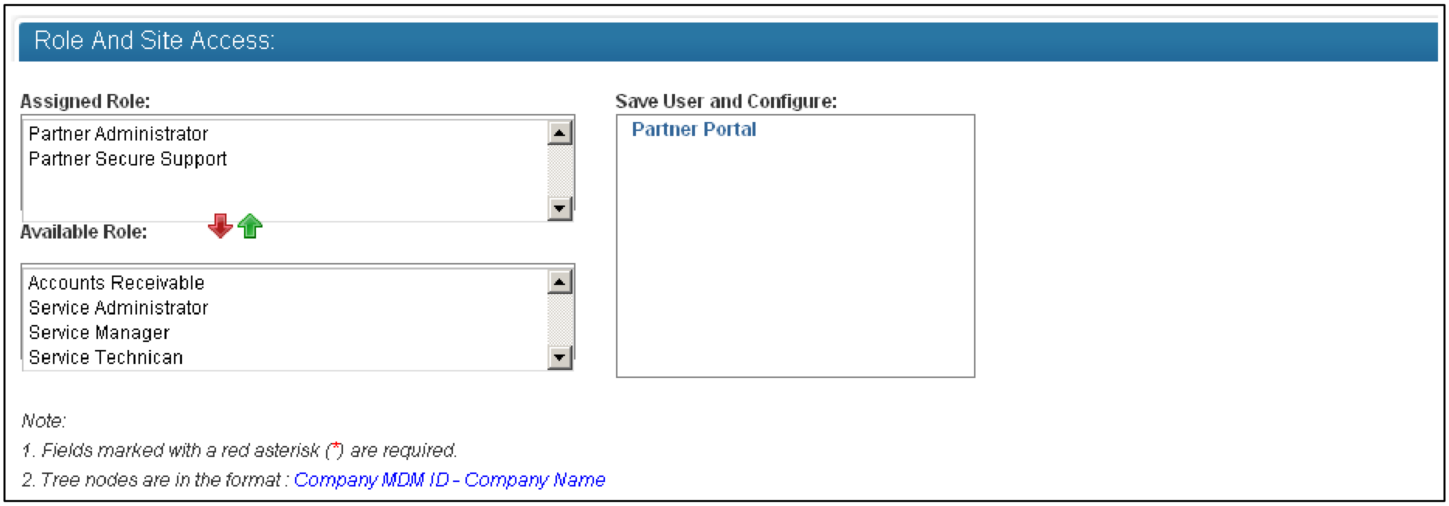
3. Under "Company Association", place a checkmark in the box next to the company name to assign the user to that company (see page 8 for more information on assigning a user to a company).



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

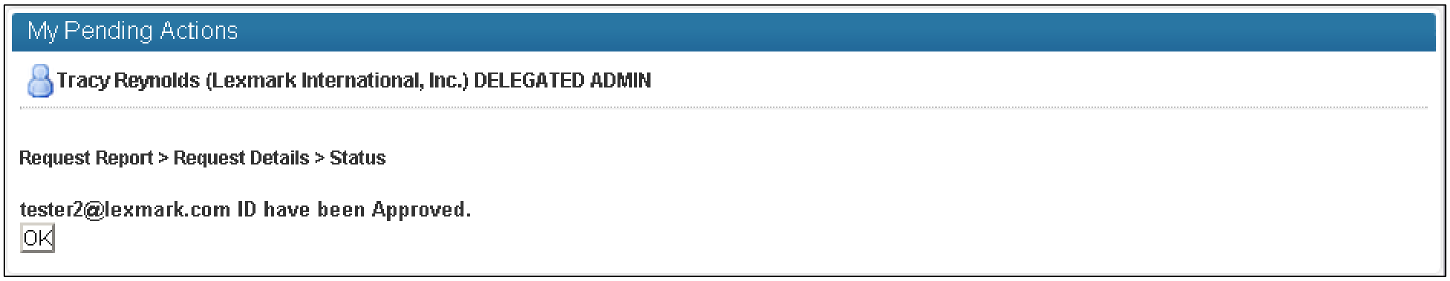
5. Determine the user's role and site access (see pages 9-11 for more information on assigning a user's role and site access). Highlight the role(s) you wish to assign to the user by clicking on the role(s). Multiple selections can

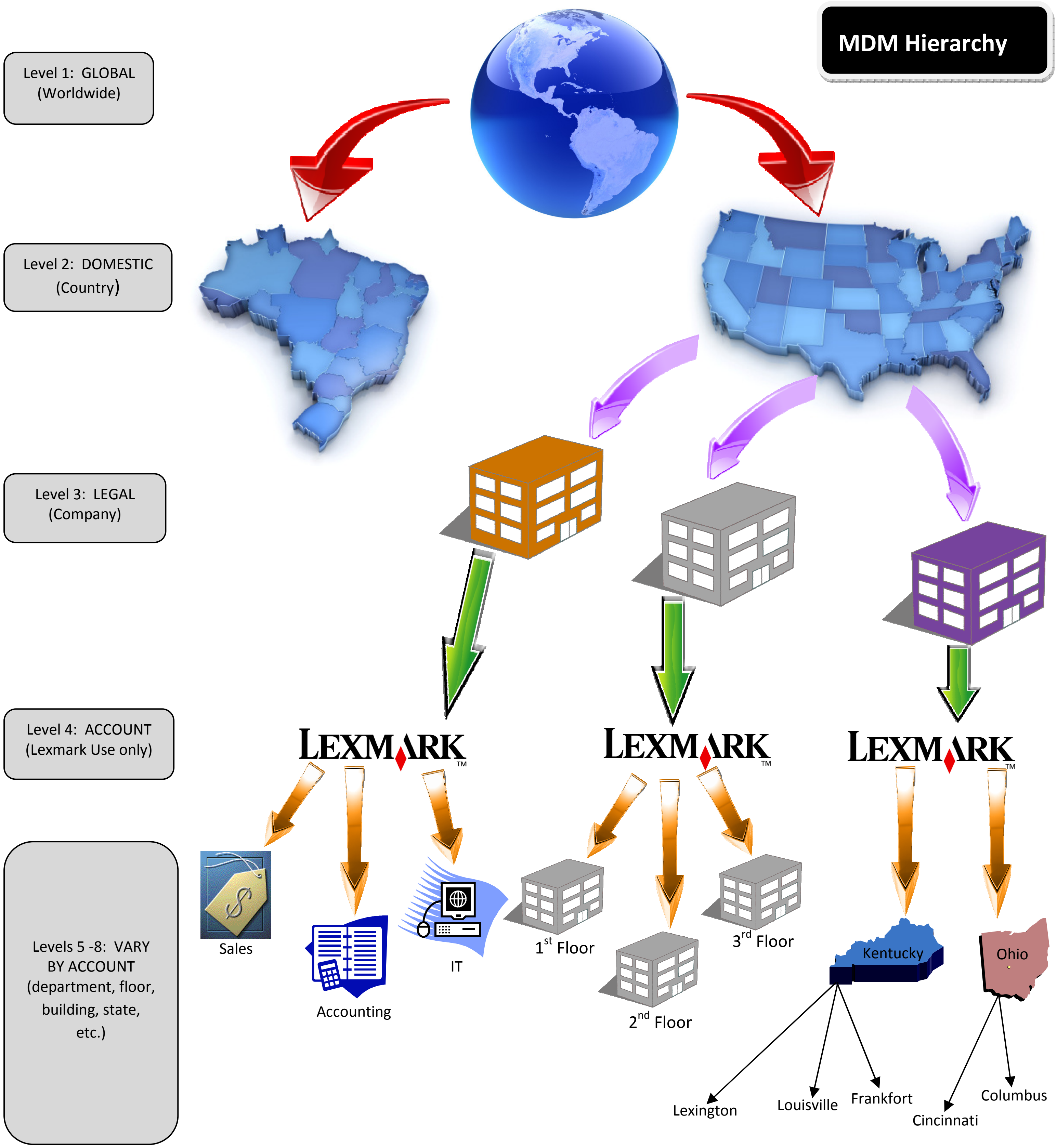
be made by using the Control or Shift key. Move the role(s) to the "Assigned Role" box by clicking the green arrow.



6. Click "Approve."

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




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.)
LEXMARK
LEXMARK
LEXMARK
Sales
Accounting
IT
1st Floor
2nd Floor
3rd Floor
Kentucky
Ohio
Lexington
Louisville
Frankfort
Cincinnati
Columbus