Recall User Self Service

recall™
Your Information. Securely Managed.

The **R**ecall **U**ser **S**elf **S**ervice Program

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INTRODUCTION

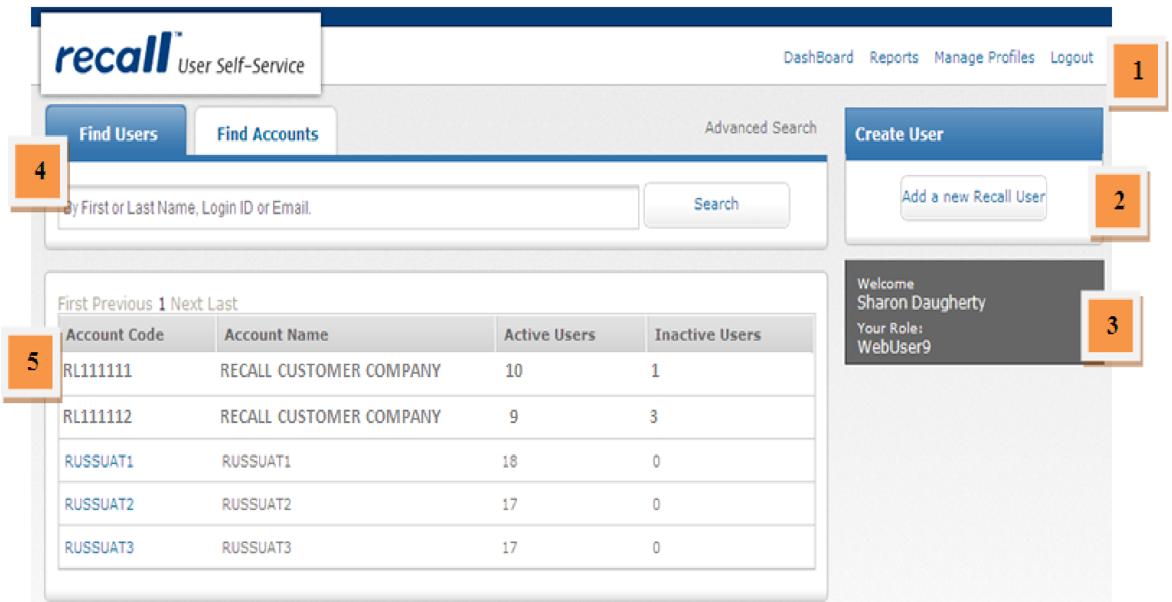
The **RUSS** program offers you an opportunity to have a hands on role in securing your inventory and information, by managing the authorization and access of your employees that interact with Recall. RUSS allows you to create and manage users, access rights and activities.

LOGGING IN

To access RUSS, go to the recall site (www.recall.com), and enter your User name and password. You will be taken to the Entrust screen; click the RUSS link.

THE DASHBOARD

The dashboard is the RUSS homepage, where you will arrive and return to as you start and move through the system.



The dashboard screen (above) displays the following links and fields for managing users:

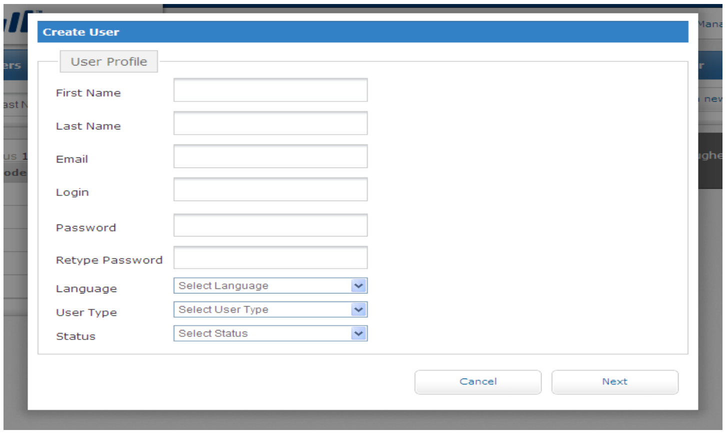
1) **LINKS**
   DASHBOARD – returns you to the RUSS homepage
   REPORTS – requesting user reports
   MANAGE PROFILES – displays the access rights of authorized users
   LOGOUT – exits the system

2) **CREATE USER** – begins the process of creating a new user
3) **USER ID** – displays your RUSS ID
4) **SEARCH** – allows you to enter information on an existing user or an account
5) **ACCOUNT INFORMATION** – displays the accounts you currently manage users for

ADDING AN AUTHORIZED USER

The following steps outline the easy setup of a new authorized user.

On the RUSS dashboard (homepage), click "Add a New Recall User" button.
The Create User screen will pop-up.



Complete the following fields:

- ✓ **First Name**
- ✓ **Last Name**
- ✓ **Email** – the User's company email address
- ✓ **Login** – you will create this login for the User
- ✓ **Password** – you will create this password for the User
- ✓ **Language** – select the primary country/language of this user
- ✓ **User Type** – the type of User is based on their employment with your company—select from the dropdown list
- ✓ **Status** – Select the status that the user will have upon their first log-in. These options allows you to set specific usage and security parameters. These statuses are useful for holding user access until you have completed internal processing (such as security checks or system setup). Users that are unable to access the system will be unable to do so until you change their status. Options include:

  Enabled – allows user to begin using the system upon their first log in
  Disabled – prevents user from using the system until access is enabled
  Password Expired – prevents user from access until password is updated.
  (select this option if you wish to force the user to create a password at first log-in)
  Locked – locks the system, preventing user access until status is changed
  System Inactive – prevents user from access and displays this message

Click 'Next' to submit the User's information

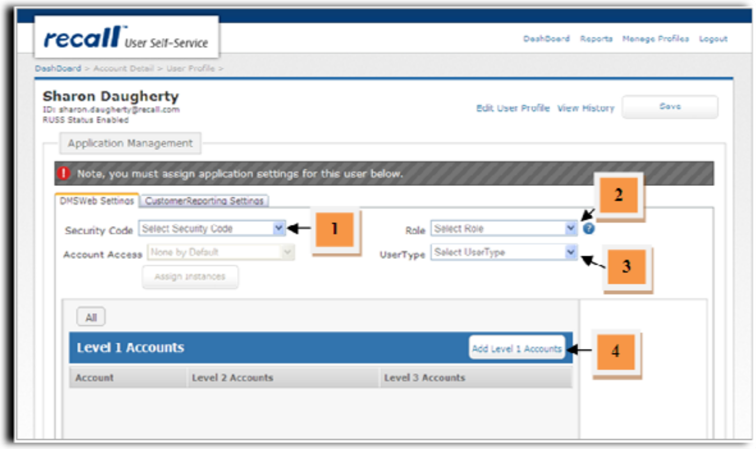
The steps above will take you to the Application Management screen, which displays all of the services your users are authorized to use.

MANAGING USER ACCESS

The Application Management screen allows you to specify the access levels for the user you are creating. This ensures additional security and lets you customize how each user can work in ReQuest Web.

The top left corner of the screen displays the name, ID, and status of the newly created user.

In order to set the access levels for your user, make selections from the following fields:



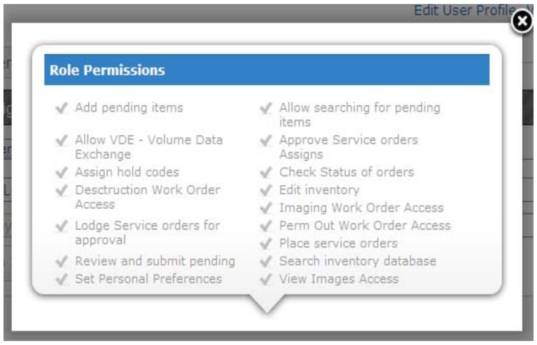
1. **Security Code –** This code indicates the how visible you wish information to be to the user. The codes range from MIN to MAX, with levels set at 10 point intervals in between (i.e., 10, 20, 30 etc.) Use your discretion to determine the appropriate security level for each user, and the amount of information they have access to increases with the security level (i.e., if you wish the user to have access to most information, set a higher level, near 70 or 80).

   A setting of 90 or MAX allows the user to see all items in your inventory, while a lower setting will block access to most items and could delay the transaction, as you will need to increase their security level before they can access more information.

2. **Role –** The roles available begin with **WebUser 0**. You will be able to set a User role level for your same level and below (i.e., a **WebUser 9** can create users from 0 to 8, but not 9 and above).

   NOTE: The question mark next to the Role field generates the Role Permissions pop-up window that displays all of the user tasks authorized at that level

   i.e., select WebUser 6 in the Role field and click the question mark to see the tasks a WebUser 6 can perform.



3. **User Type –** designate the user as either *Standard* or *WebUser* (recommended)

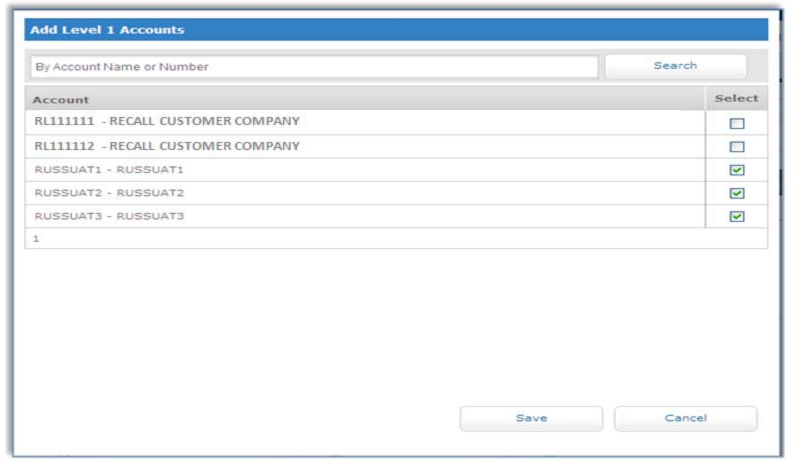
4. **Add Level 1 Accounts –** Select the Level 1 accounts you wish the user to have access to, or click ALL to give the user access to all accounts

NOTE: ***The Account Access field is grayed out, as this is Recall internal access that has been established in the customer contract.***

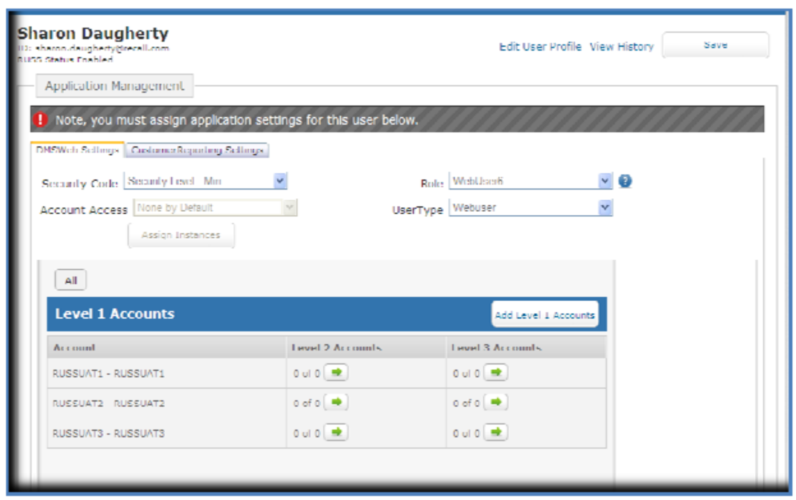
ADDING ACCOUNTS

Clicking Add Level 1 Accounts will advance you to the Account screen, where you may select the Level 1 accounts the user will have access to. Remember, all of these accounts can be selected by clicking 'All' on the previous screen. You can use this screen to select individual Level 1 accounts.

After selecting the accounts, click 'Save' to advance to the second Accounts page.



This page displays the level 2 and 3 accounts. Check 'Add Level 2 and Level 3 accounts'. If you wish to select individual accounts, click the green arrow next to the Level 1 account name to select specific Level 2s and 3s.

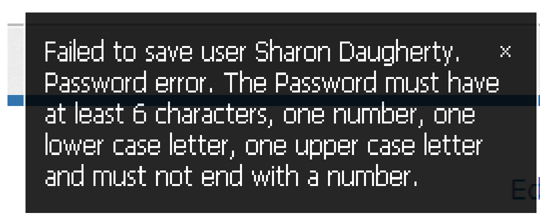


IMPORTANT NOTE: In the event that additional Level 2 or 3 accounts are added by Recall, the Recall staff will grant you access to those accounts. You will then receive an email informing you of this addition so that you can grant users access to the newly added accounts. Each individual user will need to be granted access using the same steps.

Click 'Save'. The 'Loading Data' screen will display. This page will be shown as all of your entries and selections are processed.

NOTE: If there are any issues with the entries or selections, you will be returned to the Application Management screen, where a message box will display the error.

i.e., the password you created was not correctly formatted, resulting in an error box →



Corrections can be made by clicking 'Edit User Profile' on the upper right corner of the screen.

ENABLING CUSTOMER REPORTING

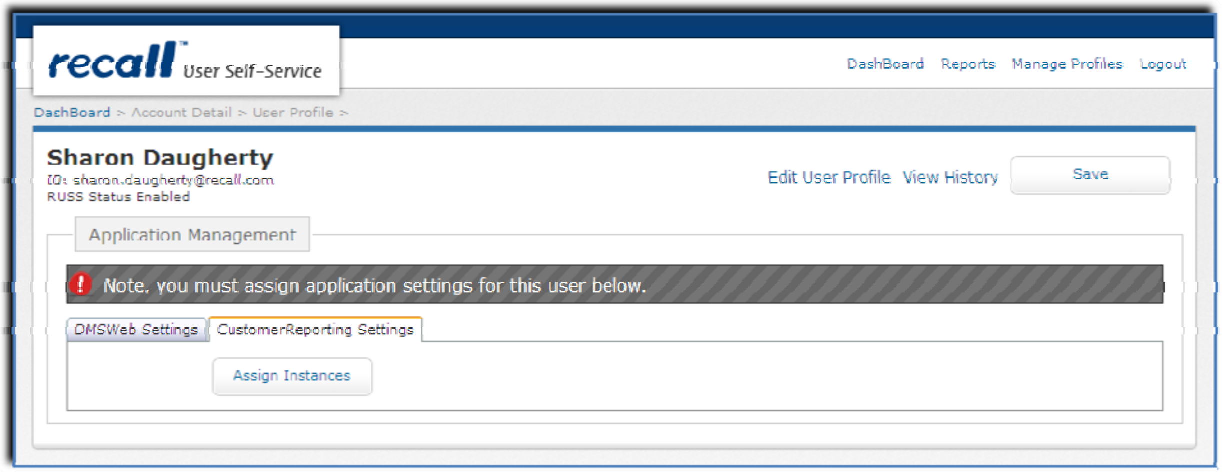
RUSS allows you to enable the user's access to reporting in ReQuest Web. This is a simple step, that you can perform during setup.

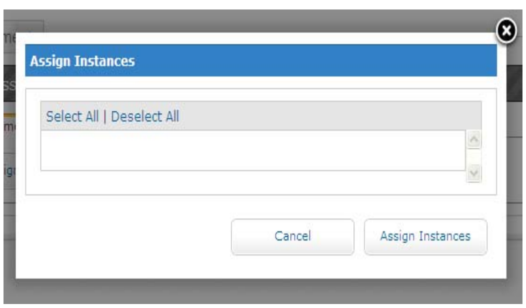
After choosing all of the security options on the Application Management screen, click the 'Customer Reporting Settings' tab (below).

A pop-up window will appear, that displays the system(s) that have reports that you can allow the user access to. Select the choices (at this time, DMS Reporting is the only instance available for selection).

Click 'Save'

The selections will be processed, and you will be returned to the Application Management screen, which will display a "successfully saved" message. You can then continue navigating through the system.

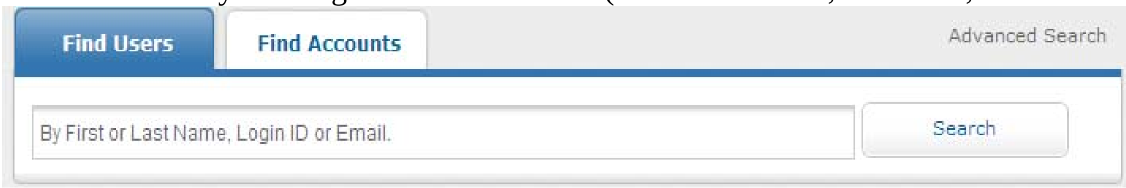




EDITING USER INFORMATION

Editing a User's profile is easy; users can change their passwords, or you can change their status (enable, disable, etc.) by following these steps:

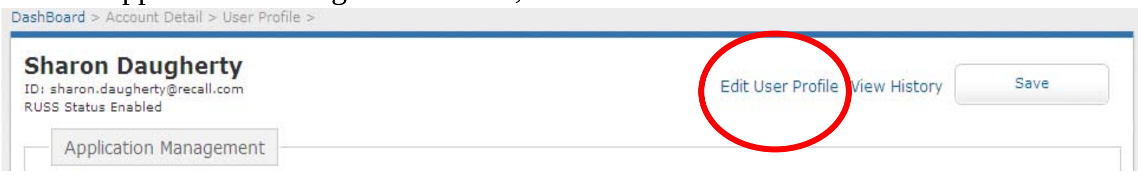
1. Search for user by entering search information (user's first name, last name, ID or email)



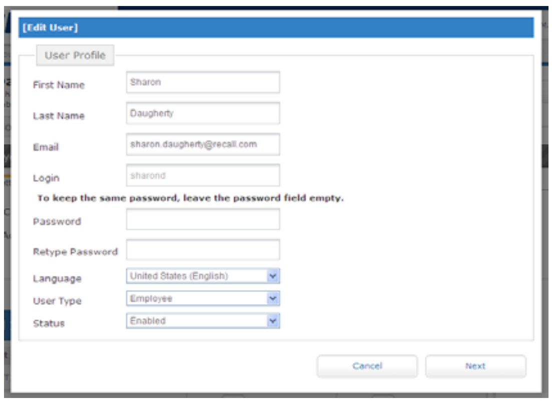
2. Click on the user's Login ID to access their information

Login ID	Last Name	First Name	Email	Status	Type
sharon9uat	Daugherty	Sharon	sharon.daugherty@recall.com	Enabled	CustomerAdministrator
sharond	Daugherty	Sharon	sharon.daugherty@recall.com	Enabled	RecallUser
1					

3. On the Application Management screen, click 'Edit User Profile'



4. The 'Edit User' window will pop-up. In this window, a user can change their password by entering their new password in the password field. You can also change their accessibility using the options in the 'Status' drop-down menu.



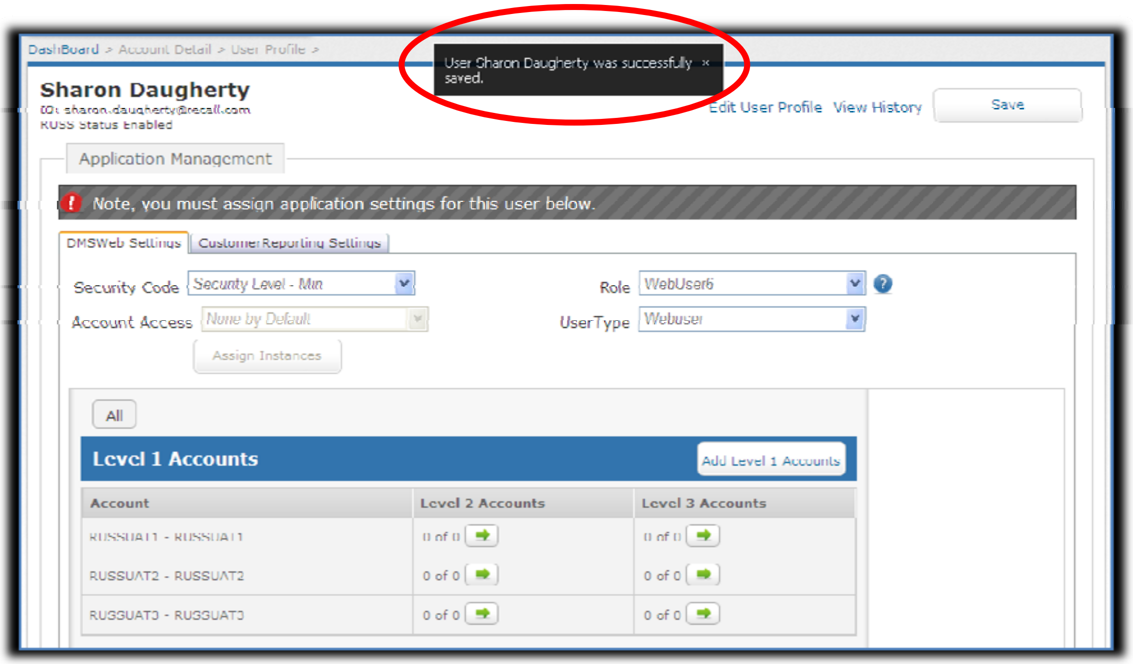
5. After completing all of your desired changes, click 'Next'. You will be returned to the Application Management screen.

6. Click 'Save'. After the new information is processed, the Application Management screen will reappear, with a message regarding the status of the update. The message will tell you that the user was successfully added, meaning the changes were accepted, or it will detail any corrections that need to be made.

7. You or the user can then continue using the system.

SUCCESSFUL COMPLETION

After all information is successfully processed, you will be returned to the Application Management screen, where a message box will indicate that the profile was created successfully.



QUESTIONS or CONCERNS?

For questions or support in using RUSS, please contact the Recall Customer CARE Web Team, by calling 1 866 732 2555 and asking for web support. For support via email, contact dmswebsupport@recall.com