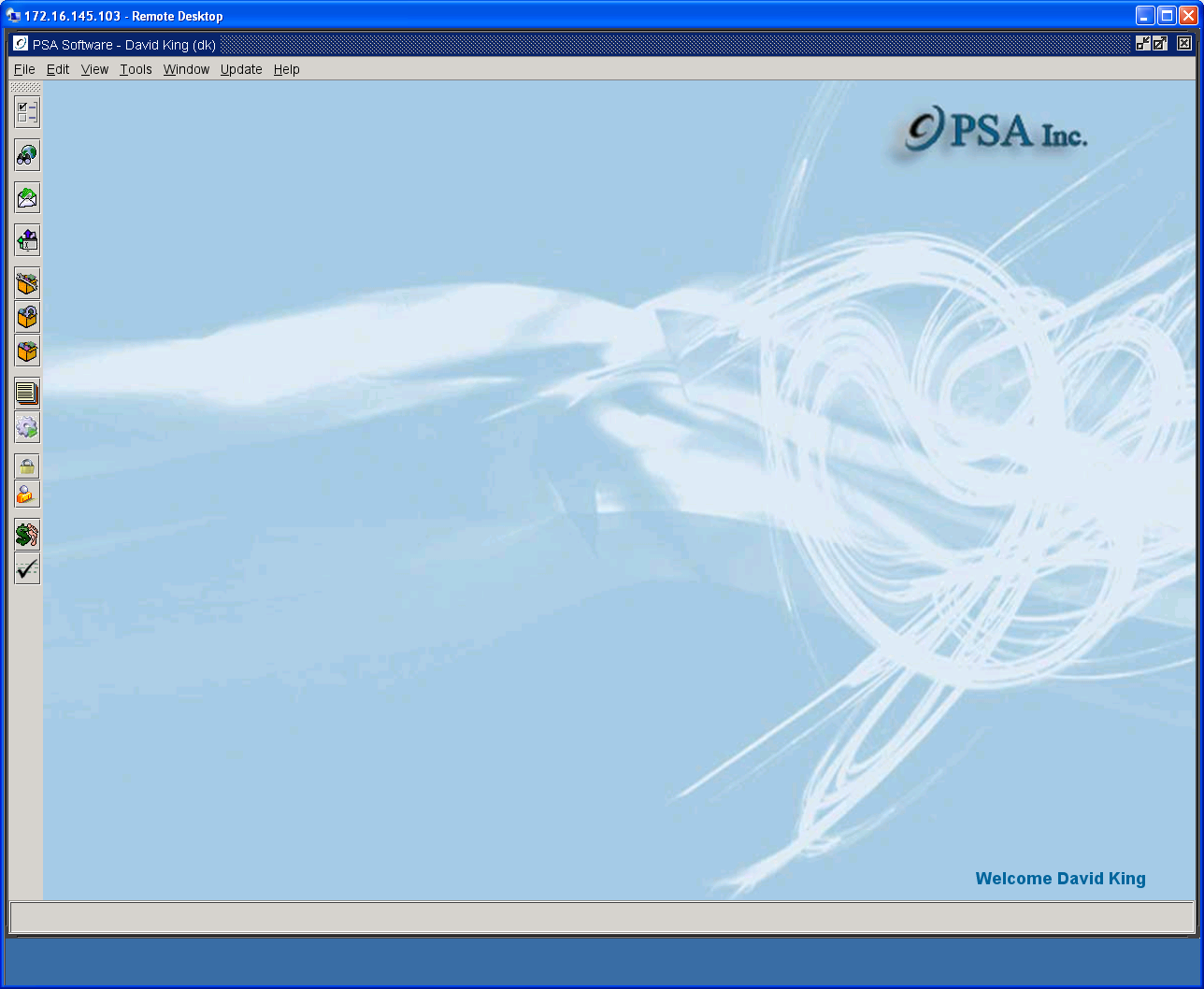
**PSA, Inc.**

**Wireless 9000**

**Desktop**

****

**Security Administration**

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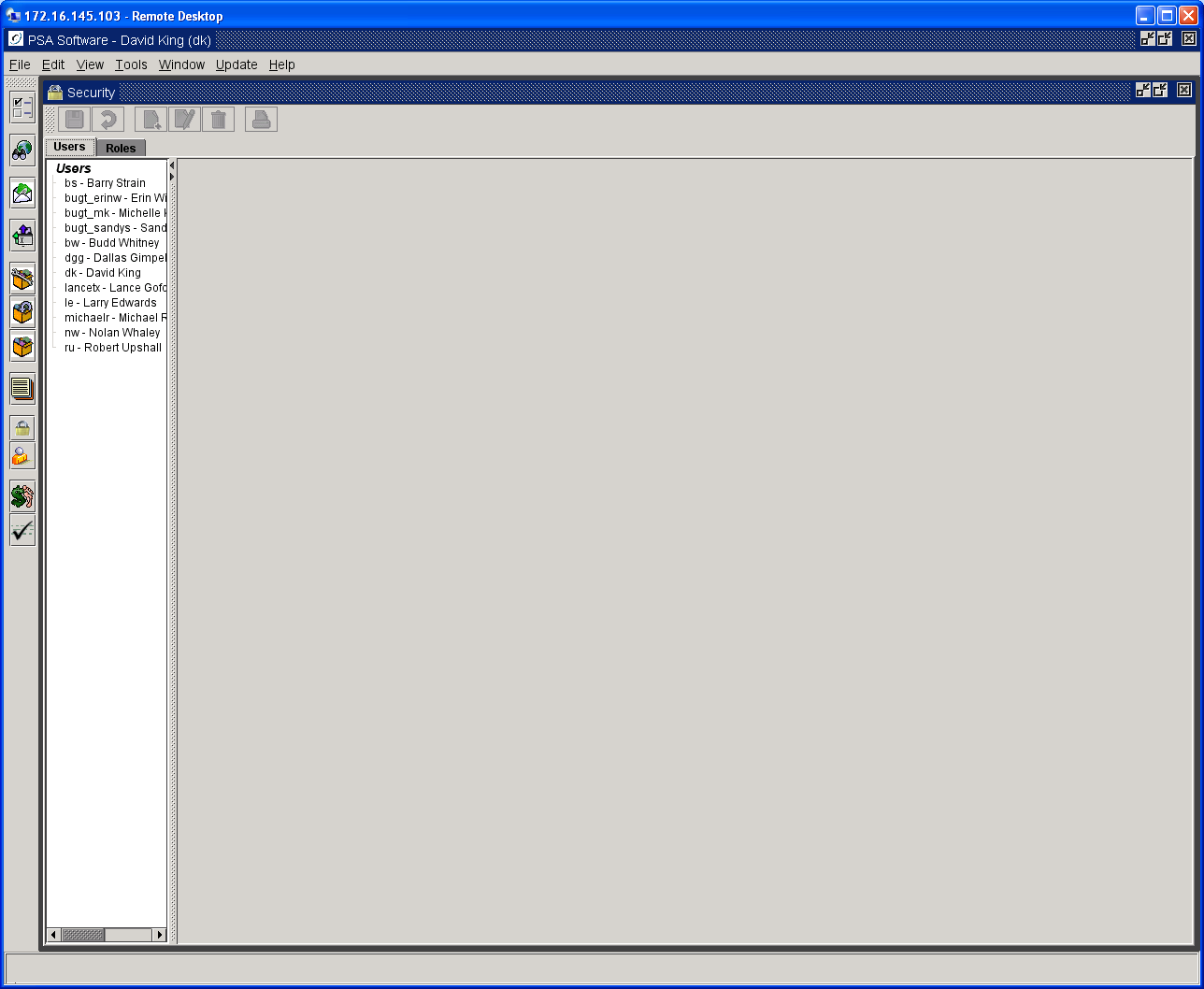
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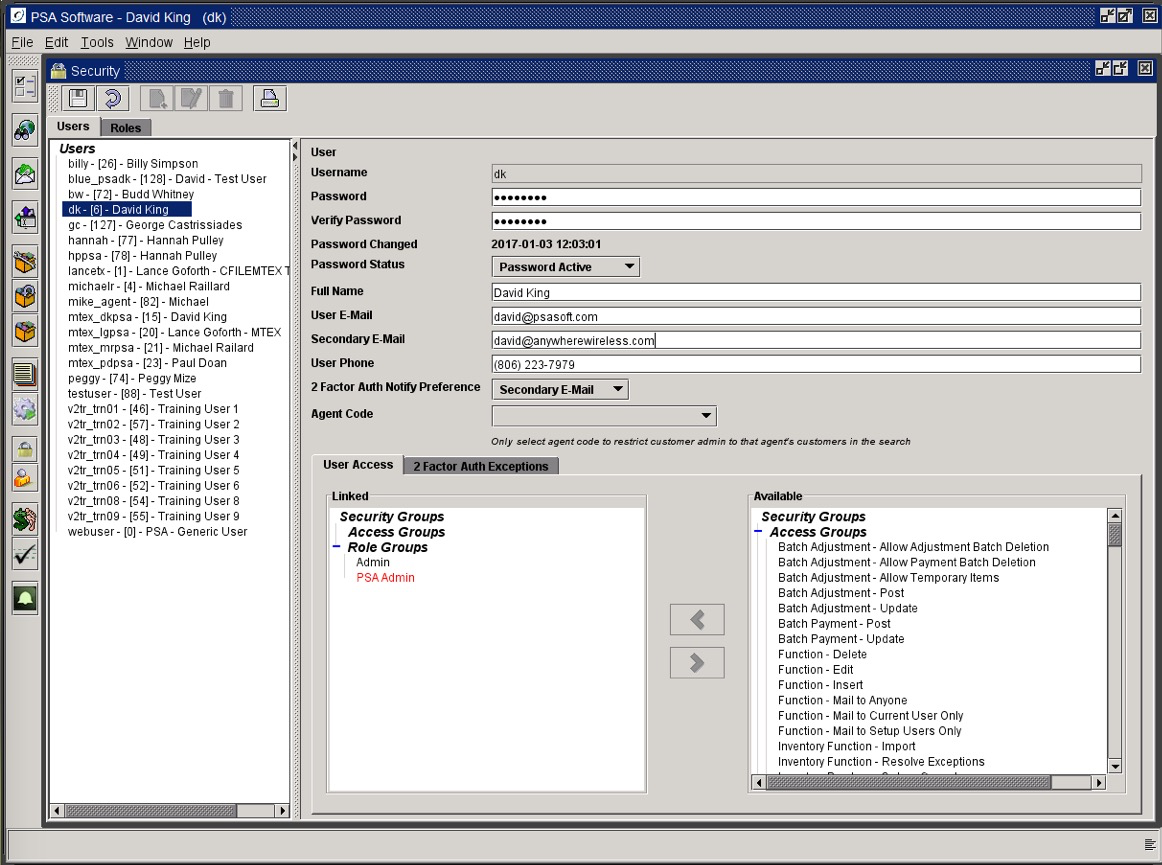
Desktop Security

**Security:** Defines the user’s level of access to components within the PSA Desktop application.



**Users:**  Defines the user’s ability to access various functions within the application. Users can have individual authorities added from the access group or can collectively be placed in a ‘role group’.

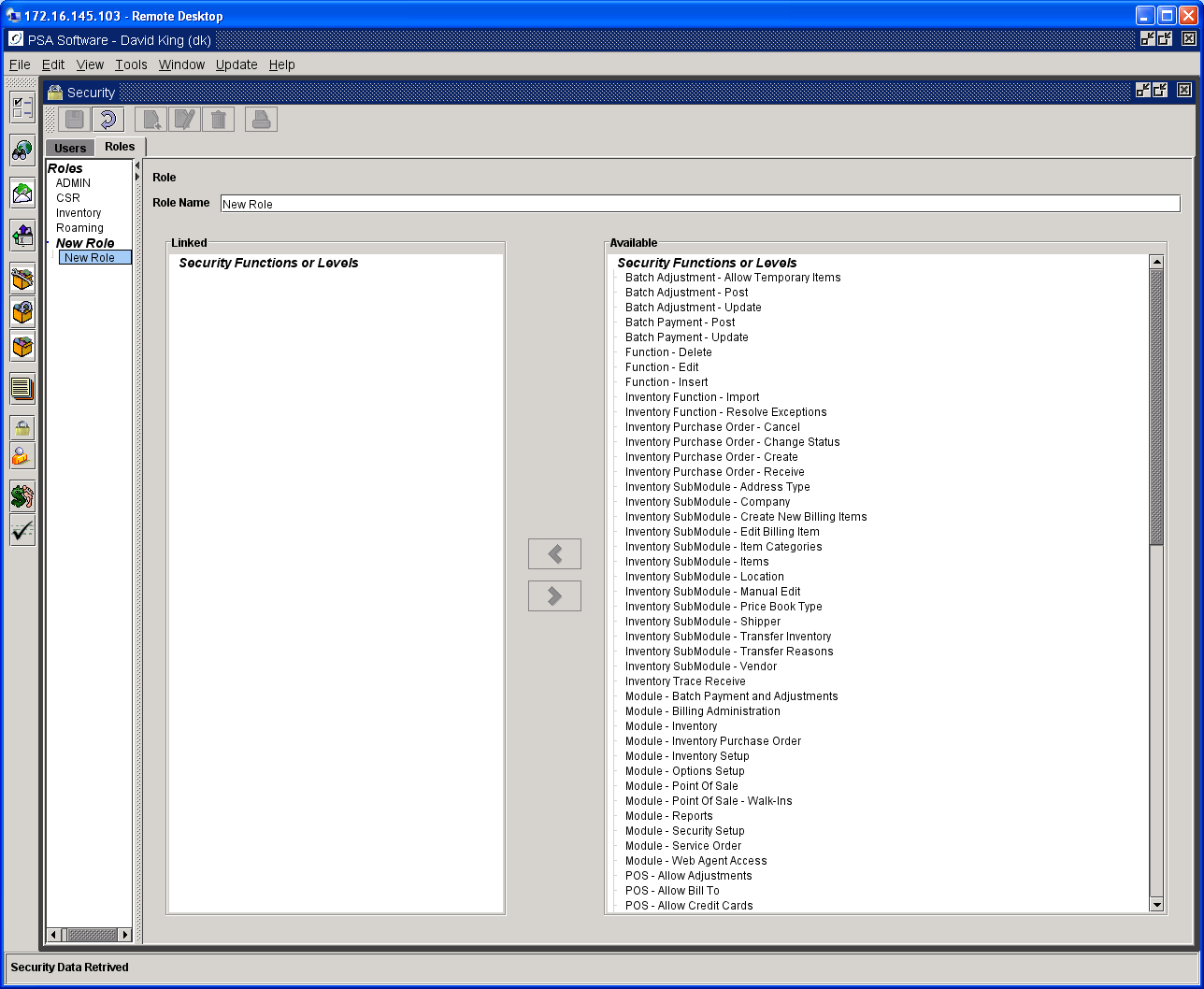
**Roles:** Allows the administrator to customize access for groups, such as CSRs, where each individual within the group has the same rights. This reduces the setup time for individuals with the same permissions. An individual can be setup with a ‘role group’ and have additional individual rights added to complete his profile.



Roles are not required; but if they will be used, they should be defined prior to creating Users in the system. New roles can be created as the need arises.

Press the *New* icon and enter the role name. being created.

Creating Roles



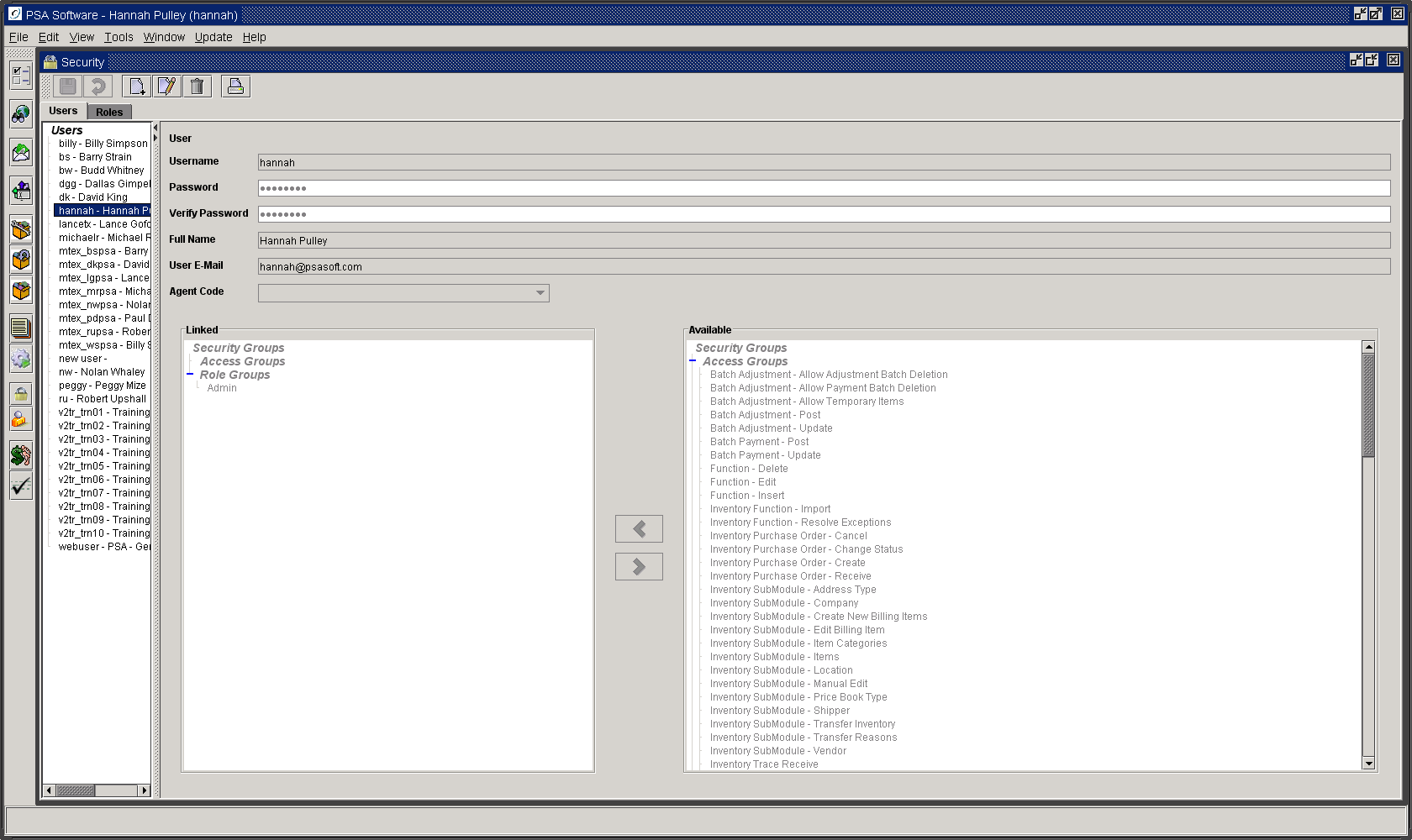
This list contains the items for which there is access control. Function – these items are found on the horizontal tool bar. Modules – are items found in the vertical tool bar. Sub-Modules are items within a Module. Example: A user may have access to the Inventory Setup Module but not have access to view/edit the Vendor section within the Inventory Setup Module.

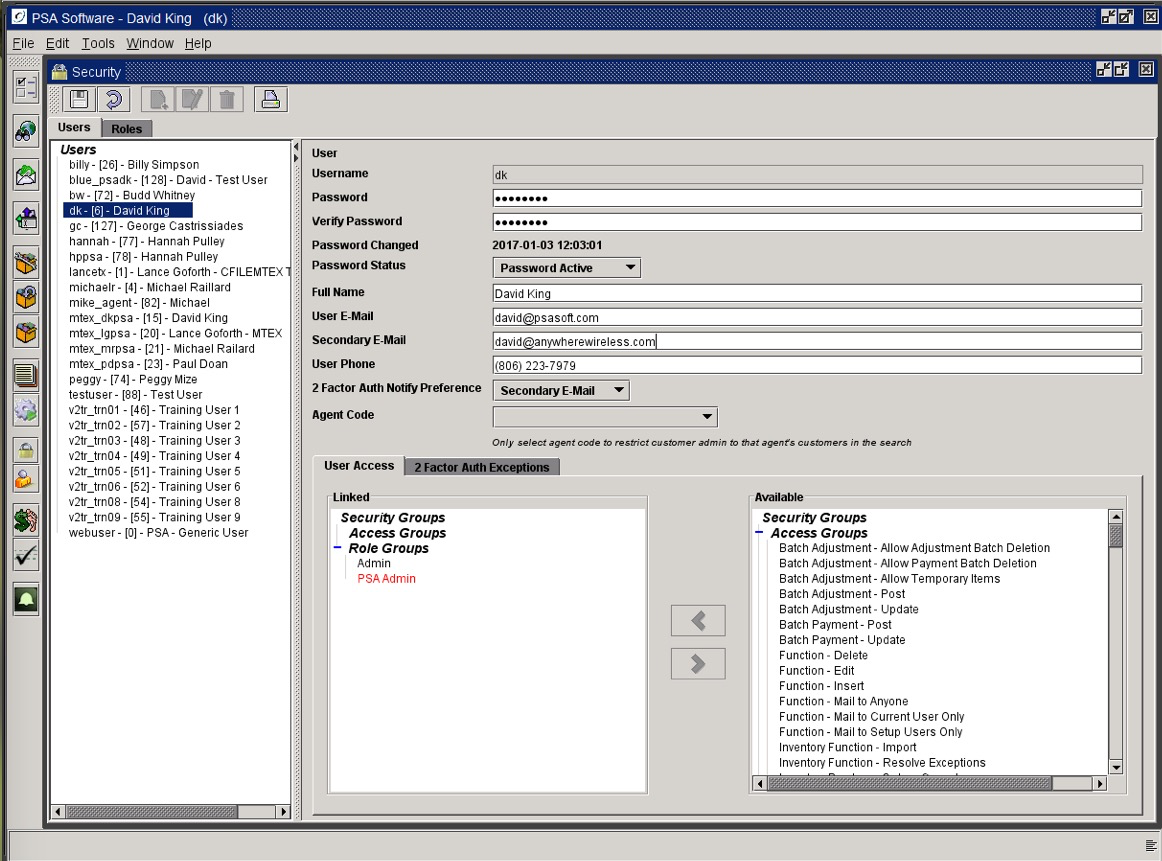
Items in the *Available* list must be moved to the *Linked* list for the user to have authority in that area.

To remove authority, move the item back into the *Available* column.

Once the roles are created, you may begin to define the authority for individuals.

User Authority Setup

Select the *Security Administration * icon on the left toolbar*.* To create a new user, press the *New* button in the Security Tool Bar. To change authority of an individual, highlight the user name and press the *Edit* button in the tool bar. To remove all authority of an individual, highlight the name and press the *Delete* button.



***User Name:***  This user name is for access to PSA Wireless 9000. This username and password should be guarded carefully. This username will be tracked throughout the application as you move about and access files.

**Characters allowed for User Name**:

abcdefghijklmnopqrstuvwxyzABCDEFGHIJKLMNOPQRSTUVWXYZ1234567890

These options can be enhanced to strengthen security, as needed using the property file for your company.

***Password:*** Requires a minimum of 3 characters with a maximum of 25 characters.

Additional parameters for name and password:

Restricted names are admin, webadmin, support, or root.

No spaces allowed.

Must contain at least 1 alpha character.

Can have no more than 3 repeating characters.

**Characters for Password:** abcdefghijklmnopqrstuvwxyzABCDEFGHIJKLMNOPQRSTUVWXYZ1234567890\_-@#$

These options can be enhanced to strengthen security, as needed using the property file for your company.

***Verify Password:***  Re-enter the password.

***Password Changed:*** Shows the last date the password was changed. This will allow for future functionality to force password changes periodically.

***Password Status:***

* 1. ***Password Active:*** allows use of the password to sign onto the application.
  2. ***Password Expired:*** when future functionality is added this would be the status once the user had not changed their password in the allotted time.
  3. ***Password Disable:*** this disallows the use of the password to access the application; this can be manually set to prevent user access permanently or on a temporary basis.

***Full Name:*** Enter the user’s full name.

***User E-Mail:*** Enter the user’s email address. When a report is too large to display in the PSA Desktop system, it will be emailed to this address. This can be used to receive the 2 Factor PIN number.

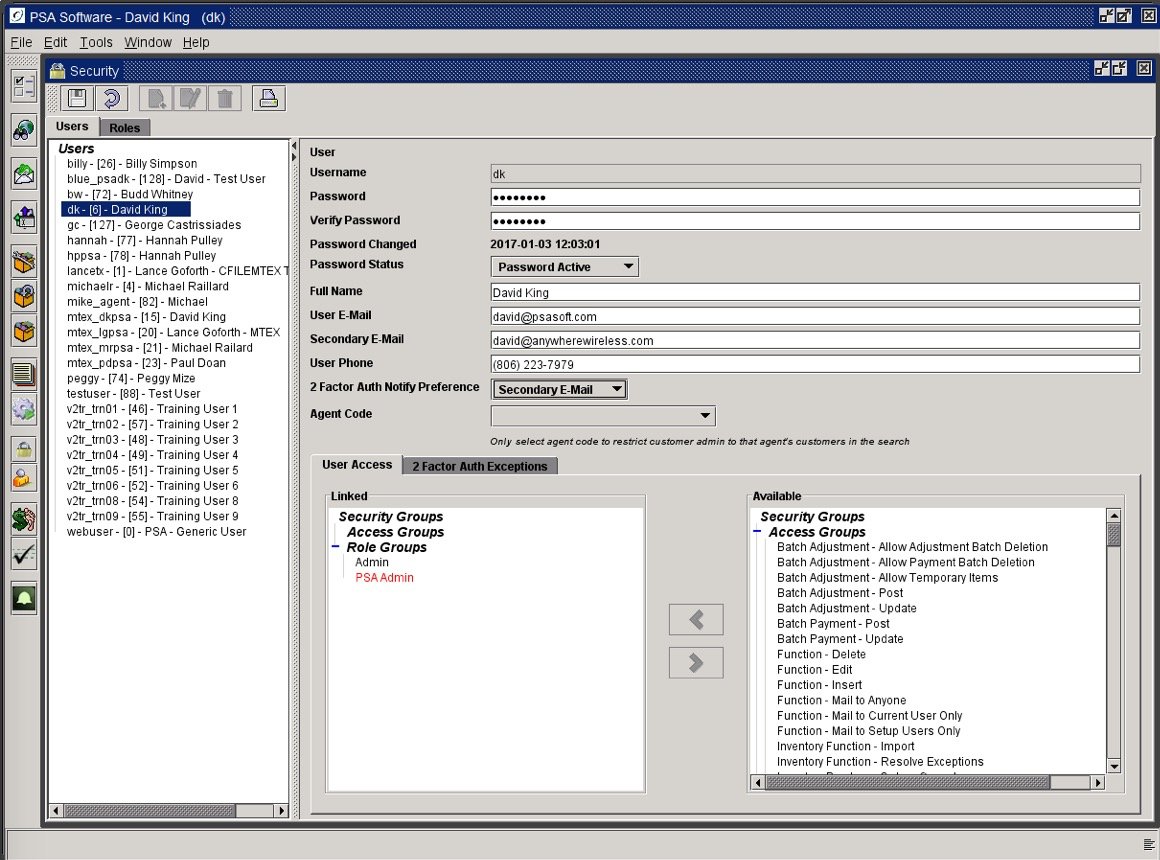
***Secondary E-Mail:*** Secondary E-Mail is an alternate email address for delivery of the 2 Factor Pin code.

***User Phone:*** User Phone will send the PIN code via SMS to this number if SMS is preference selected. The phone must be 10 digits in the following formats: 8063588928, 806 358 8928 or 806-358-8928. Slashes are invalid 806/358/8928.

***2 Factor Authorization Notify Preference:*** When using 2 Factor Authentication for V3 this will be the method to deliver the authentication PIN code to the user using one of the fields shown in the dropdown.

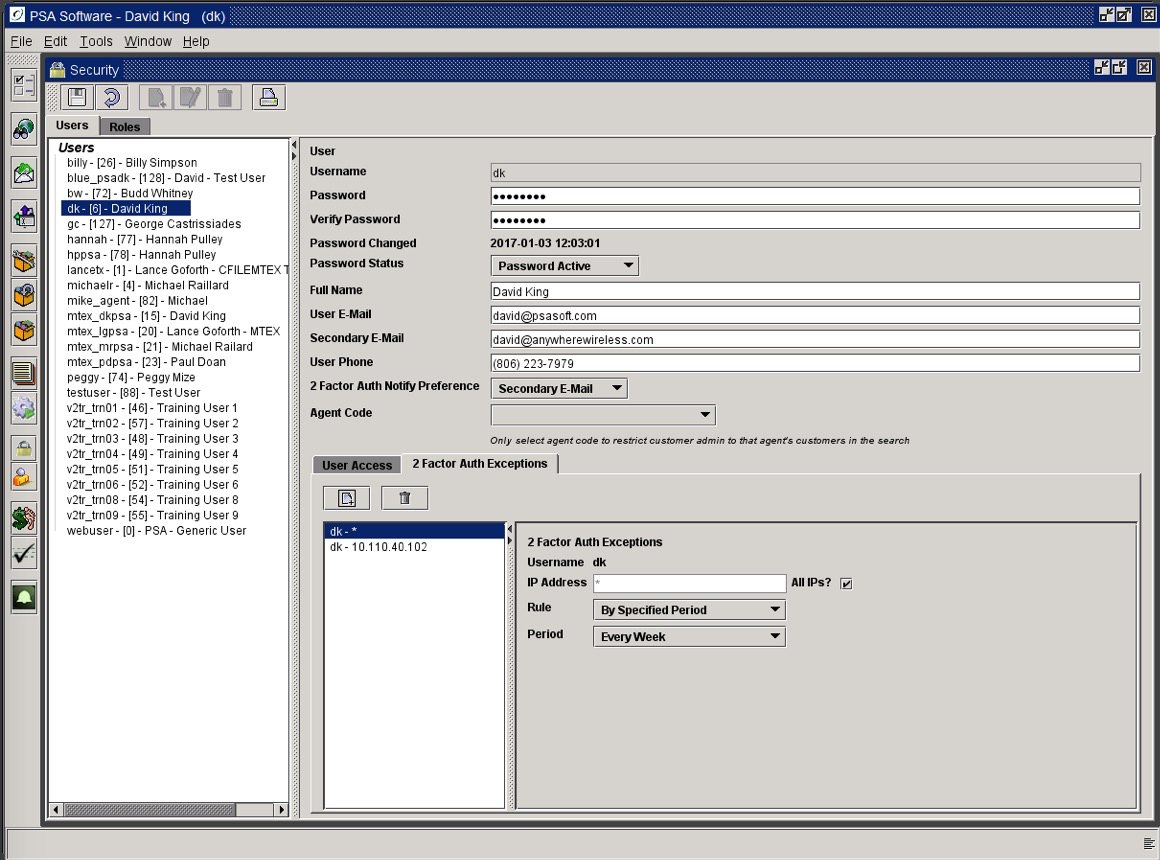
***Agent Code:*** Selecting an agent code here will restrict access in Customer Care to only those customers who have this agent code in the ‘Agent Code 1’ field on the service screen. If

***User Access Tab:***



To authorize access to the different components within the application, highlight the item in the *Available* section and press the left arrow in the center of the screen. You may select individual authorities from the Access Groups or a role from Role Groups. Normally you would select the Role authority and then add additional complimentary components if needed. Adding two roles to a user many times causes conflict within the application so it is best to have 1 role and add individual authorities to cover the access for that individual user. To remove authority, highlight the item in the *Linked* section and press the right arrow. Once the selections have been made, press the *Save* button in the top tool bar. Security items or authorities added ala carte (outside of a role) will override the setting for that specific authority within the role. Example: if CSRs are not as a rule allowed to post his or her own adjustment batches and are not given Batch Adjustment – Post; someone with the CSR role will not be able to post the adjustment. However if you have one CSR that will be allowed to post adjustment batches you do not have to change the CSR role. You can add the Batch Adjustment – Post as an individual authority. This is permanent until it is removed as an individual item.

***2 Factor Authentication Exceptions Tab:***

* 

***IP Address:*** This can be used to limit access to the application to a specific “From” IP address. If you want the user to be able to access from any IP address check the ALL IPs checkbox.

***Rule:*** This determines when or if the PIN requires refreshing.

***By Specified Period:*** this determines how often a new PIN code must be sent for outside access.

***Always Allow:*** this option should be restricted to someone accessing the V3 from the internal network with a set IP address.

***Never Allow:*** this restricts the access to the user – same as Password Disabled for the V3 access.

***Period:*** used in conjunction with the Rule to determine time frame to refresh the PIN code. There are several options to select from in the dropdown; a few are shown below.

***On Every Login:*** a PIN code is sent with every attempt to access the application.

***Every Day:*** a new PIN code is sent everyday on first attempt to access and is good for the entire day.

***Every Week:*** a new PIN code is sent every week on first attempt to access and is good for the entire week.

Definitions for Authority List:

|  |  |  |  |
| --- | --- | --- | --- |
| Batch | Adjustment | Allows Adjustment Batch Deletion | Gives the user the ability to delete an entire un-posted adjustment batch from the list. |
| Batch | Adjustment | Allows Payment Batch Deletion | Gives the user the ability to delete an entire un-posted payment batch from the list. |
| Batch | Adjustment | Allows Temporary Items | If this authority is included, then temporary items will be included in the dropdown on the Adjustment tab in POS. |
| Batch | Adjustment | Post | Allows the user to post any batch of adjustments. |
| Batch | Adjustment | Update | Allows the user to create a batch of adjustments. |
| Batch | Payment | Post | Allows the user to post payment batches created by themselves and others. |
| Batch | Payment | Update | Allows the user to enter batch payments. |
| Function | Delete |  | Allows the user to delete of any type of component or item within the system (trash can). |
| Function | Edit |  | Allows the use to make changes in editable fields. |
| Function | Insert |  | Allows the user to create new items. |
| Function | Mail to Anyone |  | Allows full editing on the ‘To’ field on emails within the application. Only in test environment. |
| Function | Mail to Current User Only |  | When set the ‘To’ field on emails is defaulted to the email address setup up on the current user profile. If this authority is selected the user cannot change the email address on his user under User Maintenance. It can only be changed in the Security Module. Only in test environment. |
| Function | Mail to Setup Users Only |  | Allows user to enter any email address and then validates the address. The address must be on an existing user setup in the Security module. If this authority is selected the user cannot change the email address on his user under User Maintenance. It can only be changed in the Security Module. Only in test environment. |
| Inventory | Function | Import | Gives the user access to the import function to manually add inventory. |
| Inventory | Function | Resolve Exceptions | Activates the Resolve function for this user. |
| Inventory | Purchase Order | Cancel | Allows the user to cancel a Purchase Order. |
| Inventory | Purchase Order | Change Status | Allows status to be changed by user (Open, New, etc) |
| Inventory | Purchase Order | Create | Activates the *Create* button for this user. |
| Inventory | Purchase Order | Receive | Activates the *Receive* button for this user. |
| Inventory | Sub Module | Address Type | Allows the user to create /edit the address type. |
| Inventory | Sub Module | Company | Allows the user to create /edit companies. |
| Inventory | Sub Module | Create New Billing Items | Displays a button that links to Item creation without having to go to the Billing Administration module. |
| Inventory | Sub Module | Edit Billing Items | Allows the user to make changes to the Billing Link from the Billing Link setup in Inventory. |
| Inventory | Sub Module | Item Categories | Allows the user to create/edit item categories. |
| Inventory | Sub Module | Items | Allows the user to create/edit items. |
| Inventory | Sub Module | Location | Allows the user to create/edit locations. |
| Inventory | Sub Module | Manual Edit | Allows the user to change items directly in the file with no reporting. |
| Inventory | Sub Module | Price Book Type | Allows the user to create/edit price book types. |
| Inventory | Sub Module | Shipper | Allows the user to create/edit shippers. |
| Inventory | Sub Module | Transfer Inventory | Activates the *Transfer* button for this user. |
| Inventory | Sub Module | Transfer Reasons | Allows the user to create/edit transfer reasons. |
| Inventory | Sub Module | Vendor | Allows the user to create/edit vendors. |
| Inventory | Trace Receive |  | Will be used by PSA to create a log of activity on a specific user during an inventory receive function. |
| Inventory | Inventory Transfer Auto Receive |  | Allows the user to scan in an equipment item to be transferred without entering the from location to a single locatio. The transfer can be incoming from several locations on the same transfer PO. |
| Inventory | Inventory Transfer Bulk Serial |  | Allows the user to receive an entire PO by accepting the serialized equipment without scanning the items on receive. |
| Module | Batch Payments and Adjustments |  | Allows access to the batch functions for payment and adjustment. |
| Module | Billing Administration |  | Allows access for setup and maintenance to your company’s main database. |
| Module | Inventory |  | Allows access to the Inventory module. |
| Module | Inventory Purchase Order |  | Allows access to Purchase Orders. |
| Module | Inventory Setup |  | Allows access to inventory Setup. |
| Module | Options Setup |  | Allows access to inventory Options Setup. |
| Module | Point of Sale |  | Grants access to point of sale. |
| Module | Point of Sale | Walk Ins | Allows user to sell inventory to customers that do not have an account with your company. |
| Module | Processes |  | Allows access to client defined functions such as Non-pay suspension reconnect utility. |
| Module | Reports |  | Allows access to the Reports module. |
| Module | Security Setup |  | Allows access to Desktop Security Setup. |
| Module | Service Order |  | Allows primary access to the Service Order functions. |
| Module | Tickets |  | Activates the Ticket system for the user. |
| Module | Web Agent Access |  | Grants access to the web payment function if agent is set on User Profile. |
| POS | Allow Adjustments |  | Adjustment tab active in POS. |
| POS | Allow Bill To |  | Allows the individual to control the Bill To check box. |
| POS | Allow Credit Adjustments |  | Permits user to add a negative amount for an adjustment. |
| POS | Allow Credit Cards |  | Allows the user to accept credit cards. |
| POS | Allow Debit Adjustments |  | Permits user to add a positive amount for an adjustment. |
| POS | Allow Debit Cards |  | Allows Debit Cards: Not functional |
| POS | Allow Delete Insert Provisioned Item |  | During a New Customer or an Add a Phone service order, when the IMEI is entered on the service screen it will be added to the invoice. There are cases where the IMEI entered on the service screen is not in inventory and should not be considered as an exception. Example would be a customer provided handset. This Allows the CSR to remove the line item from the invoice prior to completing the insert. |
| POS | Allow Edit of Bill To Account on Deposits |  | Controls user ability to change the Bill To Account flag in POS on 'Deposit' prefix items (as defined in Type of Service) |
| POS | Allow Override Return Cash to Exceed Max Amount |  | Override to Allows a return even if the return of equipment amount is larger than the max cash return amount set on the drawer. |
| POS | Allow Override of Adjustment Amounts |  | Gives the user the ability to change the amount field in adjustments. |
| POS | Allow Override of Insert Inventory Item |  | Allows supervisory intervention to create an item not in inventory at the POS purchase level. |
| POS | Allow Override of Purchase Amounts |  | Gives the user the ability to change the amount field on purchases. |
| POS | Allow Override of Return Amounts |  | Allows the user to change the amount of the refund on returns. |
| POS | Allow Override of Return Method |  | Allows the user to change the return method defaulted by the system. |
| POS | Allow Override of Non-cleared Check |  | This Allows the user to make a return even if the check hold period has not expired. |
| POS | Allow Payments |  | Makes the payments tab active, enabling the user to receive payments. |
| POS | Allow Post Adjustments Immediately |  | Posts the adjustments to customer account without further intervention, otherwise the adjustments move to batch that must be posted periodically. |
| POS | Allow Post Payments Immediately |  | Posts the payment to the customer account without further intervention, otherwise the adjustments move to a batch that must be posted periodically. |
| POS | Allow Purchases |  | Makes the Purchases tab active in POS for this user. |
| POS | Allow Returns |  | Allows the user to accept returns of POS items. |
| POS | Balance Drawer |  | Grants the user authority to balance the cash drawer and reset totals. |
| POS | Debug POS |  | Used by PSA to track user actions to help determine cause of intermittent errors. |
| POS | Debug POS Return |  | Used by PSA to track user actions to help determine cause of intermittent errors. |
| POS | Deny Edit of Tax Exempt Status |  | Prevents changing of tax exempt default status. |
| POS | Force Drawer Login |  | User must login with username and password each time a POS transaction is started. |
| POS | Installments - Allow Decrease of Deposit |  | The default value of the deposit for the equipment item cannot be changed without this authority to a smaller amount. The Deposit amount can be increased without any authority. |
| POS | Installments - Allow Increase of Term |  | This allows the length of term of the installments to be changed to a longer term than the default term. |
| POS | Installments - Allow Retail Price Override |  | Allows the user to change the defaulted value of the retail price of an installment item. |
| Processes | Allow Delete Invoice |  | Allows user to delete an invoice returning the account and inventory to the state before invoice was posted. Leaves comment in Change History report and Comments to indicate deletion. |
| Processes | Allow Full Edit - Unassigned MDN/MIN |  | Allow user full access to all fields in Unassigned MDN/MIN |
| Processes | Allow Move of Applecare |  | Transfers the Proof of Coverage from one service to another service. |
| Processes | Sub Group 0 |  | For future development to control remote reports. |
| Processes | Sub Group 1 |  | For future development to control remote reports. |
| Reports | Allows Agent Reports |  | This is only relevant if the *Agent* field on the *User Setup* screen has an entry. If you want the agent to have access to the *Reports* tab in *Customer Care,* then they must have this authority. This is similar to *View Customer Report* but it restricts by agent code. |
| Reports | Allows Archive |  | Adds the Archive Report Retrieval option to the reports section. |
| Reports | Allows Customer Level Remote Reports |  | Allows Customer Level Remote Reports: This Allows the user to run and see Remote Reports. |
| Reports | Allows Remote Reports |  | This gives the user access to the Remote Reports section under the Reports Module. |
| Service Order | Account Edit |  | Allows editing of information on Account Level customer information screens. |
| Service Order | Account Insert |  | Allows New Customer creation. |
| Service Order | Add Comment |  | Allows the user to create comments. |
| Service Order | Agent Code 1 Edit |  | Controls whether the user can change the existing Agent Code 1 field on Service Screen. |
| Service Order | Agent Code 2 Edit |  | Controls whether the user can change the existing Agent Code 2 field on Service Screen. |
| Service Order | Agent Code 3 Edit |  | Controls whether the user can change the existing Agent Code 3 field on Service Screen. |
| Service Order | Allows Advance Pay Edit Due Date |  | Allows the user to manually change the due date using the calendar icon on the Advance Pay Information tab on the Account screen. |
| Service Order | Allows Advance Pay Extend Due Date Period |  | Allows the user in Edit Provisioning on the Advance Pay Information tab to extend the due date using the extend arrow even though the account is currently active. The user will not need this authority to use the extend/reconnect arrow if the account is disconnected less than 30 days. |
| Service Order | Allows Advance Pay Reconnect |  | Activates the reconnect button on the service level screen to Allows reconnection of prepaid disconnected accounts with a disconnect date less than 30 days. After thirty days you must use Add – A – Phone to activate the customer. |
| Service Order | Allows Agent Full Customer List |  | If the user is an agent and the profile has an Agent Code defined on the user ID, then that user ID will only have access to customers that have that Agent Code shown in Agent Code 1 on the service level screen. If the agent should have access to the full customer list, then you must add this authority to the user ID. |
| Service Order | Allows Customer Admin Edit |  | Allows Customer Admin Edit: Not currently used. |
| Service Order | Allows Edit Authorized Users |  | On the account screen there are 3 fields called Authorized Users. This authority Allows the user to edit these fields. |
| Service Order | Allow Edit Disconnect Reason |  | Allows the user to change the disconnect reason code on the service level screen. |
| Service Order | Allow Edit on Calling Group Deactivate Date |  | Allows the user to change to a deactivate date to other than today’s date. |
| Service Order | Allow Edit on Calling Group Effective Date |  | Allows the user to change to an effective date other than today’s date. |
| Service Order | Allow Edit Provisioning |  | Activates the Edit Provisioning on the Insert New Customer or Phone pop up. |
| Service Order | Allow Effective Date After Billing Cycle End |  | Removing this authority will not Allows the user to date an order after the current cycle end date. |
| Service Order | Allows Effective Date After Billing Cycle Start |  | Removing this authority will not Allows the user to date an order before the current cycle start date. |
| Service Order | Allow Entry Override |  | Allows the user to bypass the password protection on CPNI access. |
| Service Order | Allow Entry with No Password |  | This turns off the password requirement to access CPNI. |
| Service Order | Allow Entry with Reminder Only |  | This displays the CPNI information for visual confirmation when opening a customer’s file. |
| Service Order | Allow NonPay Suspend Reconnect |  | This activates the reconnect button on the service level screen to force reconnect from non-pay suspension (only if the account status is NonPay Suspend or Manual Suspend will the Reconnect icon be visible). |
| Service Order | Allow Override Early Termination Fee Amount |  | When a phone is disconnected, a box will pop-up displaying the contract expiration date. If the phone is still under contract then it also displays and populates the Early Termination field. This authority Allows the user to edit the Early Termination field. |
| Service Order | Allow Selection of Remove Items on Manual Suspend |  | Allows Selection of Remove Items on Manual Suspend: Allows the user to change the "Remove Items on Suspend' check box. |
| Service Order | Allow Service Deactivation |  | This authority activates the radio button on the service screen that Allows the user to permanently disconnect a phone. |
| Service Order | Allow Service Insert Only on Account Create Date |  | This only Allows Add-A-Phone to be active on an account on the original account creation date. |
| Service Order | Allow Service Manual Suspend/Reactivate |  | This controls the 2 radio buttons on the service screen. For the user to be able to manually suspend and then subsequently reactivate a phone they must have this authority. |
| Service Order | Bypass Credit Check |  | This Allows the credit check section to be skipped when activating a new account. |
| Service Order | Close Frames after New Customer Opens |  | Once a *New* *Insert* is completed, all report forms will be closed even if not printed. |
| Service Order | Credit Application Only |  | The user can access the credit application for data entry only. |
| Service Order | Deny Edit Tax Exempt |  | Prevents user from changing the Tax Exempt Status on the Service Screen |
| Service Order | Documents | Deny Account PDF's | Prevents access to Account Level PDFs |
| Service Order | Documents | Deny Bills | Prevents access to Monthly Statements |
| Service Order | Documents | Deny Account PDF's | Prevents access to Contract PDF |
| Service Order | Documents | Deny Invoices | Prevents access to All invoices on account |
| Service Order | Documents | Deny Service PDF's | Prevents access to Service Level PDFs |
| Service Order | Edit Credit Comment |  | Allows user to enter or change the comment field on the credit screen after initial entry. |
| Service Order | Edit Deposit Amount |  | Allows the user to change the deposit amount required on risk credit. |
| Service Order | Insert New ACH Transit/Bank |  | Allows the user to enter bank information from Service Order. |
| Service Order | Items | Allows Item Deletion | Gives the option of deleting an item on the Package/Plan/Feature instead of removing the item. This should be used cautiously; deleting an item will *NOT* pro-rate the charges as a removal will. The item will just no longer exist on the account. When an item is deleted, a record will be created on the *Change History* report showing the date, user, before and after fields. |
| Service Order | Items | Allows Link Preservation on Plan Changes | This opens a new frame when doing a rate plan change that displays two options (1) Preserve Service Link and (2) Break Service Link. |
| Service Order | Items | Override Link Package/Plan Filter | Allows the user to turn off Show Only Link Compatible Packages and Plans when adding new packages or rate plans. |
| Service Order | Items | Override Rate | Allows the user to override plan/item/adjustment rates in the service order. |
| Service Order | Override Blocked Provisioning Items |  | On the Insert screen there is verification of existing inventory and/or locate existing serialized items on existing customers. If the option is set to prevent insert then this authority will Allows the user to override to continue the service order. |
| Service Order | Override Contract Length |  | Allows the user to change the default contract length on the Service Screen. |
| Service Order | Override Credit Level |  | Allows the user to continue into a new insert even if credit guidelines are not met to authorized new service. |
| Service Order | Retrieve Credit Report |  | Authorizes the user to request a full credit report from credit vendor. |
| Service Order | Service Edit |  | Allows the user to edit information on the Service Level customer information screens. |
| Service Order | Service Edit on Suspended and Disconnected |  | Allows limited editing on service screen even if service is suspended/ disconnected. Allows Deposit Refund on disconnected accounts. |
| Service Order | Service Insert |  | This activates Add-A-Phone on New popup. |
| Service Order | View All ACH Bank Account Numbers |  | Allows the user to view complete numbers unless tokens are used in which case only token information is available. |
| Service Order | View All ACH Route Numbers |  | Allows the user to view of complete numbers unless tokens are used in which case only token information is available |
| Service Order | View All Credit Card Numbers |  | Allows the user to view complete number unless tokens are used in which case only token information is available |
| Service Order | View All Social Security Numbers |  | Allows the user to view complete numbers. |
| Service Order | View Credit Score |  | Displays only the credit score, credit rating flag, and deposit required to the user. |
| Service Order | View Customer Documents |  | This Allows the user to access the Documents tab on a customer in the Customer Care module. |
| Service Order | View Customer Reports |  | This Allows the user to access the Reports tab on a customer in the Customer Care module. |
| Service Order | View Full Credit Report |  | Allows the user to view the entire credit report information. |
| Service Order | View Only Last 4 ACH Bank Numbers |  | Displays only the last four digits unless tokens are used in which case only token information is available |
| Service Order | View Only Last 4 ACH Route Numbers |  | Displays only the last four digits unless tokens are used in which case only token information is available |
| Service Order | View Only Last 4 Credit Card Numbers |  | Displays only the last four digit unless tokens are used in which case only token information is available. |
| Service Order | View Only Last 4 Social Security Numbers |  | Displays only the last four digits. |
| Service Order | Sub Module | Account |  |
| Service Order | Sub Module | Items |  |
| Service Order | Sub Module | Service |  |
| Tickets |  |  | Allows Override of Action Code: Allows user to change the Action code in Edit mode. |
| Tickets |  |  | Allows Override of Assigned User: Allows user to change the Assigned User in Edit mode. |
| Tickets |  |  | Allows Override of Clear Code: Allows user to change the Clear code in Edit mode. |
| Tickets |  |  | Allows Override of Due Date: Allows user to change the Due Date in Edit mode. |
| Tickets |  |  | Allows Override of Due Date: Allows user to change the Notify Date in Edit mode. |
| Tickets |  |  | Auto Display Assigned User Tickets – If the ticket system is implemented and this is added to a user, if that user has tickets assigned to them the Ticket frame will open and display open tickets. |
| Web Agent | Super Agent |  | Allows access to web payment portal even if user profile does not have an agent set. |