

# **General User's Guide Healthcare Covisint Connection and Administration (My Profile Administration)**

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Document Revision Level 1.4

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## ALL PORTAL USERS

### Accessing the "My Profile" Administration Application

1. Log in to your portal.



2. Click **My Profile** from the Welcome drop down menu. The Home page of the Account Administration application is displayed.

#### RESULT:

You have successfully accessed the My Profile account administration application.

## Reset Your Password

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A Password reset is a multi-step process that entails:

- answering a security question
- obtaining a temporary password in two parts (one on the screen and one via email)
- entering your temporary password
- resetting to a new, chosen password
- logging in with your chosen password



If your organization also uses the IDcipher™ Card premium service, in addition to password login, then your existing IDcipher™ Card will become null and void upon successfully resetting your password via "forgot password" link. The system will automatically send you a new IDcipher™ Card upon password reset.

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1. Navigate to the Login screen.

A screenshot of a web application's login screen. At the top, there is a title "Registered Users Sign On" with a lock icon to its left. Below the title are two input fields: "User ID" and "Password". A blue "Sign On" button is positioned below the password field. At the bottom of the form area, there is a line of text: "Clicking on Sign On indicates acceptance of [Terms of Use](#) and [Privacy Policy](#)". Below this text is a list of four links, each with a green plus icon: "Forgot your Password?", "Forgot your User ID?", "Check your Registration Status", and "Request a new IDcipher card".

2. **Forgot Your Password?** link.
3. In the open text box, key in your User ID.
4. Click **Submit**. The Challenge Question screen is displayed.

5. Key in the answer to the Challenge Question, exactly as you did during registration.
6. Click **Submit**. The first half of your temporary password is displayed on the screen. The remaining four digits of your temporary password are sent to the email address with which you registered.
7. Write down the four numbers displayed on your screen on a sheet of paper.
8. Retrieve the remaining four digits from your email Inbox.
9. Key in your User ID in the open text field.
10. Key in your eight digit temporary password in the open text field.
11. Click **Sign On**. You are immediately prompted to change your password.
12. Key in the eight digit temporary password in the Old Password open text field.
13. Create a new password, and key it into the New Password open text field. Passwords must adhere to specific rules. Refer to the password rules on your screen if necessary.
14. Key in your new password again in the Confirm New Password open text field.
15. Click **Update**.



If the [IDcipher™ Card](#) is required in addition to password sign on, then your existing IDcipher™ Card will become invalid upon successfully resetting your password. The system will automatically send you a new IDcipher™ Card upon password reset.

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#### RESULT:

You have successfully reset your password and are now ready to sign on to the portal.

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(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## Unlocking Your Account

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For security purposes, your user account will become locked if you unsuccessfully attempt to log in to the portal beyond the predetermined login attempt limit. When this is the case, perform the [Password Reset](#) function to unlock your account.

If an IDcipher™ Card is required to sign on, your existing IDcipher™ Card will become invalid when your account is unlocked and the system will automatically send you a new IDcipher™ Card.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## How Do I Get An IDcipher™ Card?

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The IDcipher™ card is used as a method for authentication that may optionally be used within Portals that require up-level authentication.

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The process for obtaining an [IDcipher™ Card](#) is dependent upon your user status. [Click on the link that best describes you:](#)

[➔ I am an existing user, I can already log in to the portal, but I need a new IDcipher™ Card >>>](#)

[➔ I am new to the portal, and not yet a registered user? \(You have not yet registered for the portal\) >>>](#)

When you register for portal access, an IDcipher™ Card will automatically be generated and emailed to you upon approval of your registration request if the portal you are requesting access to requires the IDcipher™ Card for up-level authentication.



After submitting a registration request, users need not perform additional action to obtain an IDcipher™ Card.

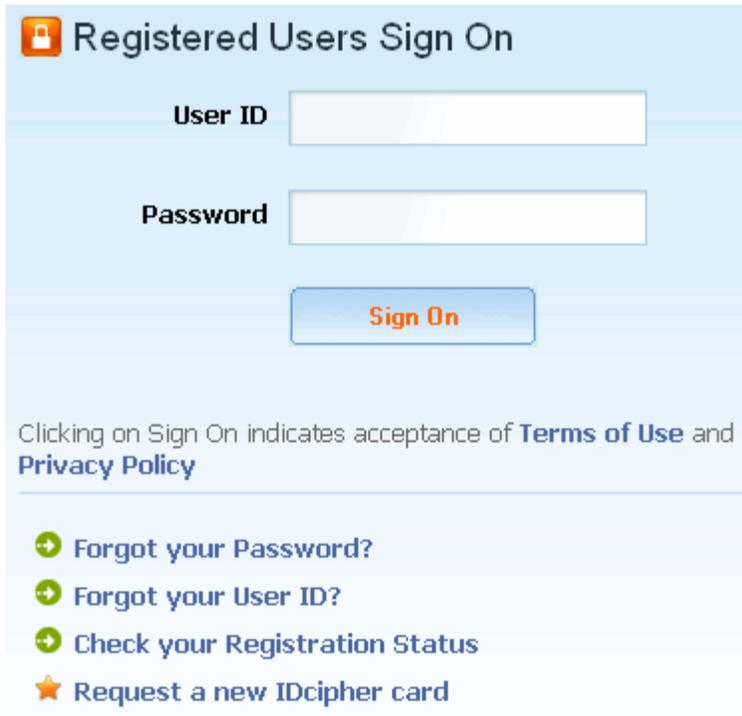
(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## Existing Portal User - I Need a New IDcipher™ Card

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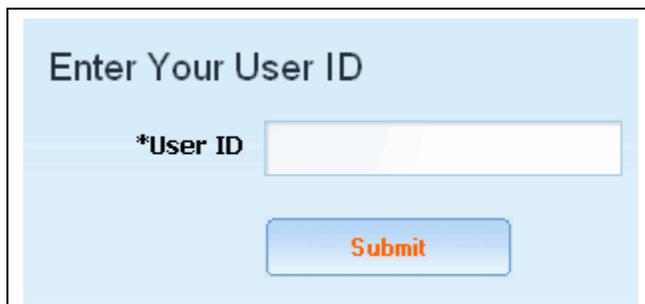
If you are not in possession of your IDcipher™ Card, you are able to generate a new card. Complete the following steps to generate a new card that will be emailed to the email address you provided during registration in your user profile. (The IDcipher™ Card will be sent to the email address registered in your profile).

1. Navigate to the portal sign on screen.



The image shows a web form titled "Registered Users Sign On". It features two input fields: "User ID" and "Password". Below these fields is a blue button labeled "Sign On". Underneath the button, there is a line of text: "Clicking on Sign On indicates acceptance of [Terms of Use](#) and [Privacy Policy](#)". At the bottom of the form, there are four links, each preceded by a green plus sign icon: "Forgot your Password?", "Forgot your User ID?", "Check your Registration Status", and "Request a new IDcipher card". The "Request a new IDcipher card" link is highlighted with a star icon.

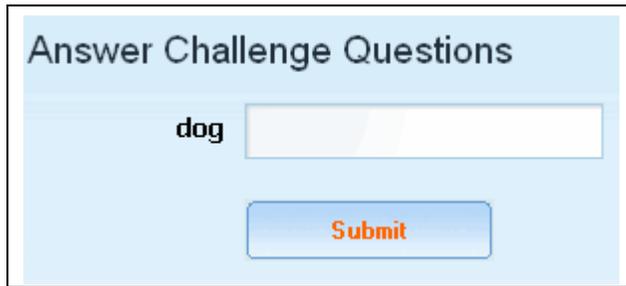
2. Click **Request a new IDcipher™ Card**. The **enter user ID** screen is displayed.



The image shows a web form titled "Enter Your User ID". It features a single input field labeled "\*User ID". Below the input field is a blue button labeled "Submit".

3. Key in your User ID in the open text field.

4. Click **Submit**. The **challenge question screen** is displayed. (*Learn more about a challenge question/answer >>>*)

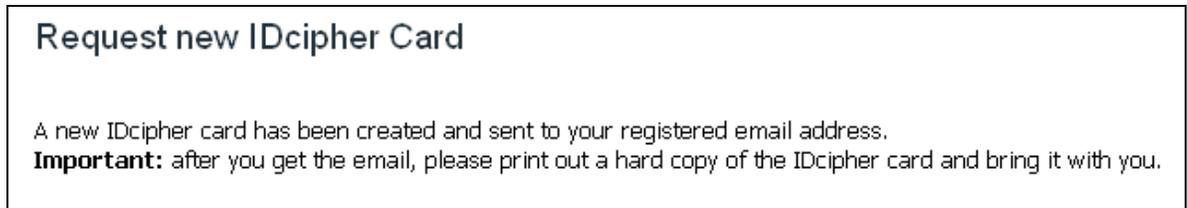


Answer Challenge Questions

dog

Submit

5. Key in the answer to your challenge question.
6. Click **Submit**. A confirmation screen displays that a **new IDcipher™ Card** has been generated and emailed to you.



Request new IDcipher Card

A new IDcipher card has been created and sent to your registered email address.  
**Important:** after you get the email, please print out a hard copy of the IDcipher card and bring it with you.

## RESULT:

You have successfully obtained a new IDcipher™ Card.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## About the IDcipher™ Card

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The IDcipher™ Card is used as a method for authentication that may optionally be used within Portals that require up-level authentication.

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The IDcipher™ Card provides two-factor authentication (something the user knows and something the user has) which may be used when up-level authentication is required. The card provides a low-cost, easy-to-use, easy-to-deploy authentication mechanism that provides an extra level of assurance when a user is authenticated.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## When Will I Be Prompted To Use An IDcipher™ Card Number?

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You will only be prompted to use an IDcipher™ Card when up-level authentication is required and the IDcipher™ Card was specified as the method of authentication required to complete the up-level authentication.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## Up-Level Authentication

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Up-level authentication is an authentication process that prompts the user for an additional, stronger form of authentication than a user name and password, when a user attempts to gain access to a system resource that requires an additional level of protection. Additionally, the user may be prompted for up-level authentication based on specified criteria which can be derived from user provided information (e.g. a specific user name), system collected information (e.g. an unknown PC IP Address), as well as transaction patterns (e.g. time of day the user signs on or how frequently the user is signing on).

Covisint has trademarked the IDcipher™ Card as a means of providing up-level authentication.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

## Administrator Roles Matrix (Portal and User Security)

Two categories of roles are managed within the Administration too. Those are:

- o Covisint Connection and Administration (CCA) Administrator roles
- o [Health Exchange Roles](#)

The following table lists the privileges that are contained within CCA Administrator roles. When Division Administrators are assigned the Security Admin role perform tasks, each task is only applicable to that division. The role of Security Administrator applies to the division-level as well as the top-level organization. If your company sets up Divisions (aka practices) in this online structure, the Administrator at the Division level is also called a Security Administrator.

CCA Administrator roles are not tied to Health Exchange roles.

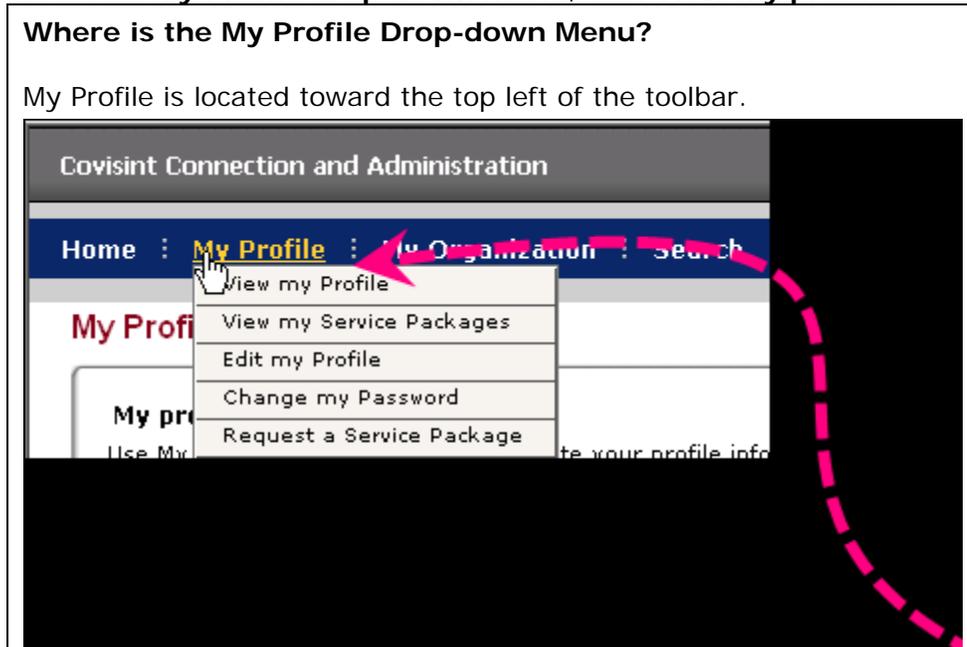
**Table 1:**  
**Matrix of Privileges Associated Per Role**

	Service Admin	Security Admin	Division Admin
Approve / Reject division's service package request	X	X	-
Approve / Reject new user registration requests	-	X	X
Approve / Reject organization service request	-	X	-
Approve / Reject site codes for divisions of your org	-	X	-
Approve / Reject user's service package requests	X	X	X
Audit user grants	X	X	X
Audit users in company (Quarterly & Annually)	-	X	X
Change email preferences for self	X	X	X
Change password of self	X	X	X
Delete a division in your org	-	X	-
Delete a user account	-	X	X
Edit organization and/or division profile	-	X	X
Edit profile of others	-	X	X
Edit profile of self	X	X	X
Generate a service summary report	-	X	X
Generate report of user summary by organization	X	X	X
Generate report of users grants per svc. package	X	X	X
Generate security administrator reports	X	X	X
Grant a service package to a division in your org	-	X	-
Grant a service package to a user	X	X	X
Invite users to register	-	X	X
Modify user roles	-	X	X
Move a user	-	X	X
Remove a service package from a division in your org	-	X	-
Remove service package from a user	X	X	X
Request a service package for my organization	X	X	X
Request a service package for self	X	X	X
Reset password of others	-	X	X
Search /View details for divisions in my organization	X	X	-
Search for users in my organization	X	X	X
Specify password for self	-	X	X
Specify password of others	-	X	X
Suspend a division in your org	-	X	-
Suspend a user account	-	X	X

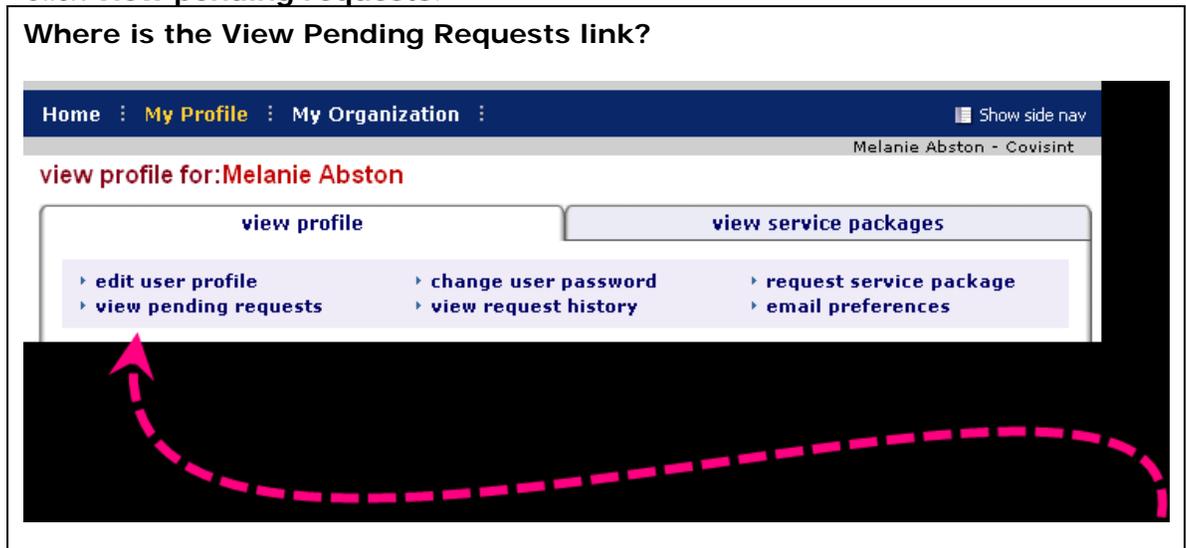
## GENERAL USERS

### Cancel a Pending Request

1. From the **My Profile** drop-down menu, click **View my profile**.



2. Click **view pending requests**.



3. Enable the checkbox of each request you wish to cancel.
4. Click **cancel pending request**.
5. Click **Submit decision**.

**RESULT:**

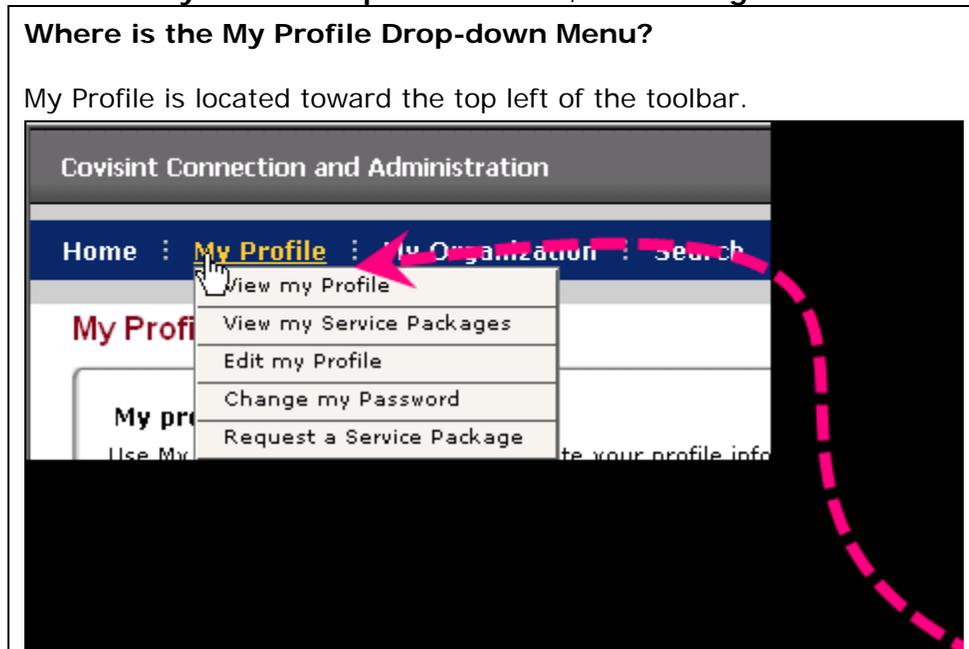
You have successfully cancelled a pending request.

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## Change Your Password

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1. From the **My Profile drop-down menu**, click **Change Password**.



2. In the New Password open text field, create a new password that adheres to specific rules. Refer to the password rules on your screen if necessary.
3. In the Re-enter New Password open text field, key *in the newly created password* to verify that you have typed it correctly.
4. Click **Submit password change**.

### RESULT:

You have successfully changed your password.

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## Manage Your User Profile

Home : **My Profile** : My Organization :
Show Side Nav

Melanie Abston - Covisint

### My Profile: Melanie Abston

**My profile options**

Use My Profile options to view and update your profile information. Using the options under the My Profile menu you can update your contact information, view your service packages and site codes, change your password and request access to new service packages.

- **View my profile**  
View your contact information and any administrator roles that you may have been assigned.
  - **View my service packages**  
View the list of service packages and sub-packages to which you have access.
  - **Edit my profile**  
Edit your name, address, phone number or email address.
- **Change my password**  
Update your password.
  - **Request service package**  
Request access to additional service packages.

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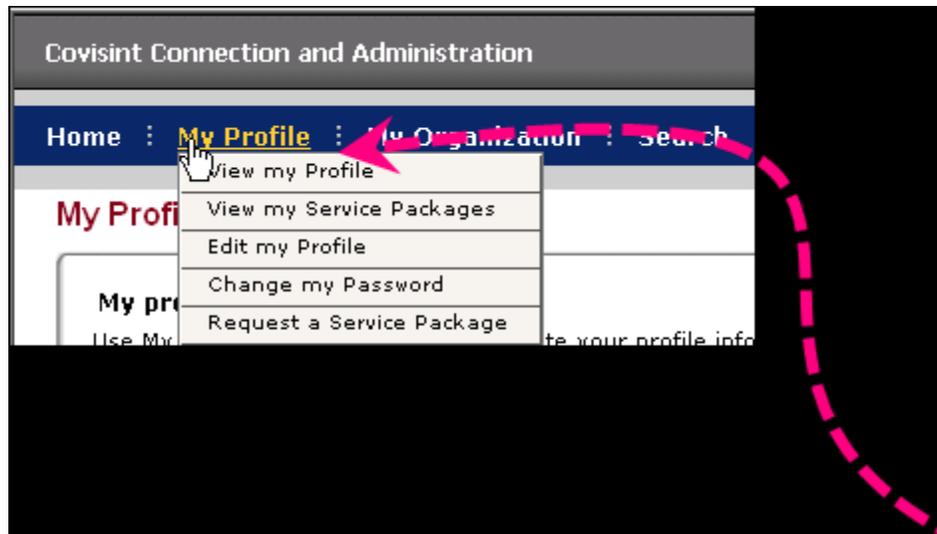
From the My Profile link, you are able to edit your:

- location information
- email address
- security question/answer
- password



- A User ID can never be modified, and can never be reused. Even if a Security Administrator removes your access from the portal, your User ID is invalid forever. If you need to be reinstated to access the portal, you must register for access again, using a different User ID.
- Hover your mouse over a question mark icon to view help text related to that field
- Be sure to enter an email address to which you have access at any time. For example, if your company firewall blocks certain email accounts, such as yahoo.com or aol.com, do not use that email address for your user profile.

1. Perform one or more of the following from the **My Profile drop-down menu**:

**IF YOU WISH TO...**

edit your location information

**THEN:**

- a. Click **Edit my Profile**.
- b. Modify your address information as required. A User ID can never be modified, and can never be reused. Even if a Security Administrator removes your access from the portal, your User ID is invalid forever. If you need to be reinstated to access the portal, you must register for access again, using a different User ID.
- c. Proceed to step 2.

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edit your email address

- a. Click **Edit my Profile**.
- b. Modify your email address as required. Be sure to enter an email address to which you have access at any time. For example, if your company firewall blocks certain email accounts, such as yahoo.com or aol.com, do not use that email address for your user profile.
- c. Proceed to step 2.

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modify your security question / answer

- a. Click **Edit my Profile**.
  - b. Review the details and requirements next to the Challenge Question and Challenge Answer fields.
  - c. Modify your security question / answer as desired, adhering to the rules and policies listed.
  - d. Proceed to step 2.
- 

2. Click **Save Changes**.

**RESULT:**

You have successfully edited your User Profile.

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## My User ID is Suspended

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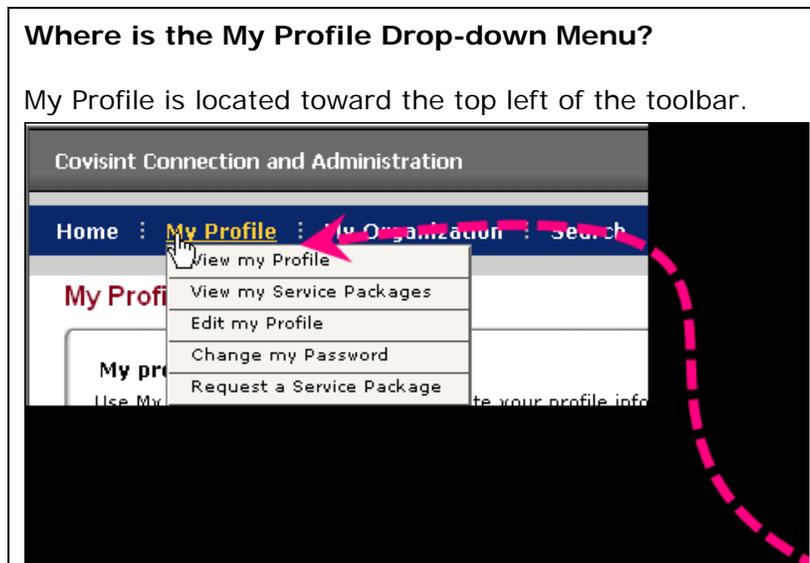
If your User ID has been suspended, you are not able to reactivate it on your own. You will need to contact your administrator. Only your security administrator can reactivate your User ID.. Covisint Help Desk cannot re-activate suspended IDs, only your administrator can do that.

However, if your User ID is locked (from too many login attempts, for example), you are able to unlock your account by following the steps to reset your password.

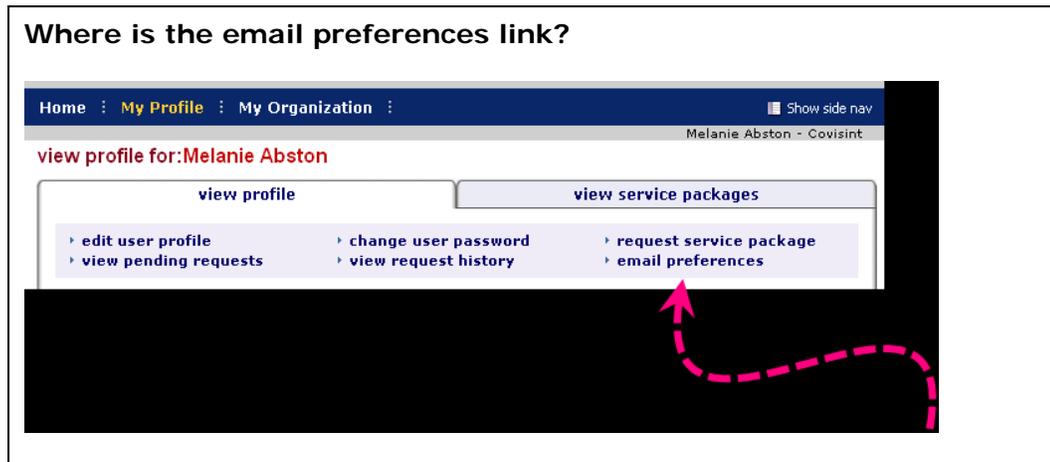
## Opt Out of email Notices

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1. From the **My Profile** drop-down menu, click **View my profile**.



2. Click **email preferences** link.



3. Deselect the checkbox of each item you for which you do not wish to receive notification. (You are not able to opt out of password reset emails for security reasons).
4. Click **Save changes**.

#### RESULT:

You have successfully opted out of email notices.

## Password Reset Process

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Password reset is a multi-step process. During password reset, the system will assign a new 8-digit temporary password to you. The first 4 digits of the temporary password will be displayed on your screen, the second half of the password will be sent to the email address you used during registration.

You will retrieve both sets of numbers to obtain your temporary 8-digit password.

## Request Service Packages

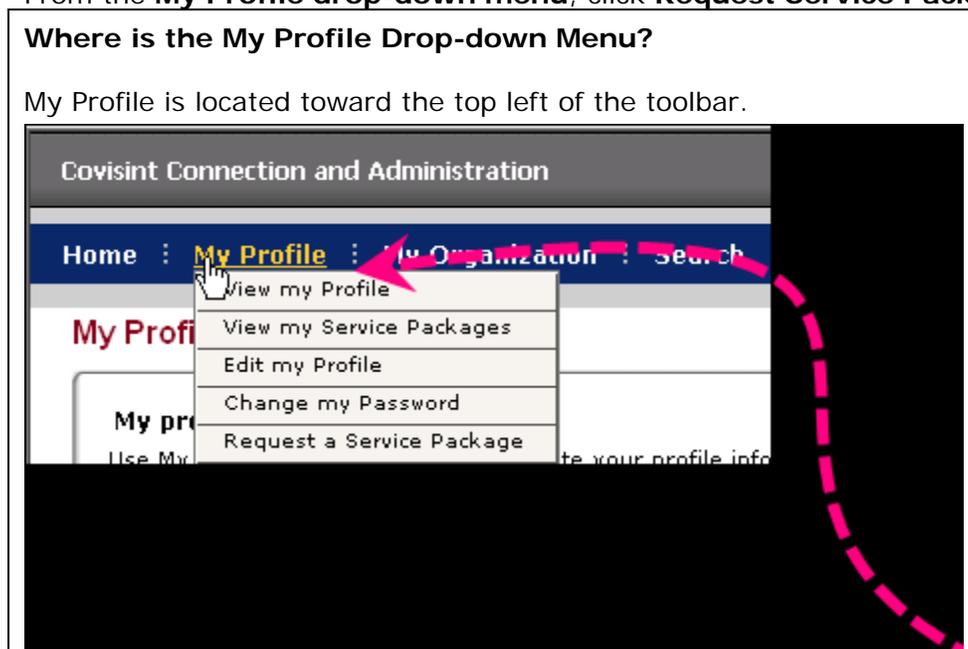
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A service package is a defined group of one or more applications to which you may have requested access during registration.

Later, post-registration, you may need to request additional service packages in order to perform your job duties.

Your Security Administrator will approve/reject your request, and you will be notified of this decision via email. Additionally, your Security Administrator may grant a service package to you, without receiving a request from you.

1. From the **My Profile** drop-down menu, click **Request Service Package**.



2. Click **request** next to the package you wish to request.
3. Enter the reason for request in the open text box.
4. Click **continue**.

5. Repeat steps 1 – 4 as necessary for additional service packages.

### **WHY DON'T I SEE THE PACKAGE OR SUB-PACKAGE I WANT ON THE LIST OF REQUESTABLE PACKAGES?**

If you have already have been approved or already have a pending request for that package or sub-package, you will not see the package on the list. Keep in mind that if you are trying to find a specific service, it may be bundled in a package with a different name. Check the package description to view the services it contains.

### **IF YOU DID NOT RECEIVE A RESPONSE TO MY REQUEST FOR A SERVICE PACKAGE. NOW WHAT?**

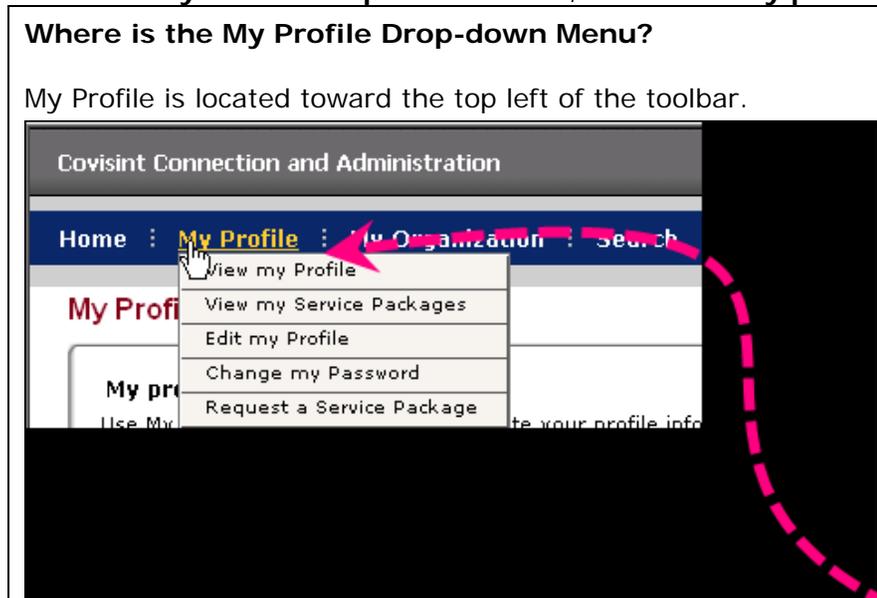
Your request was routed to your Security Administrator. You can send a reminder email to your Security Administrator by viewing your profile, then clicking the View Pending Requests link inside the application. You will have an opportunity from that screen to remind your Security Administrator to evaluate your request or you can cancel the request.

#### **RESULT:**

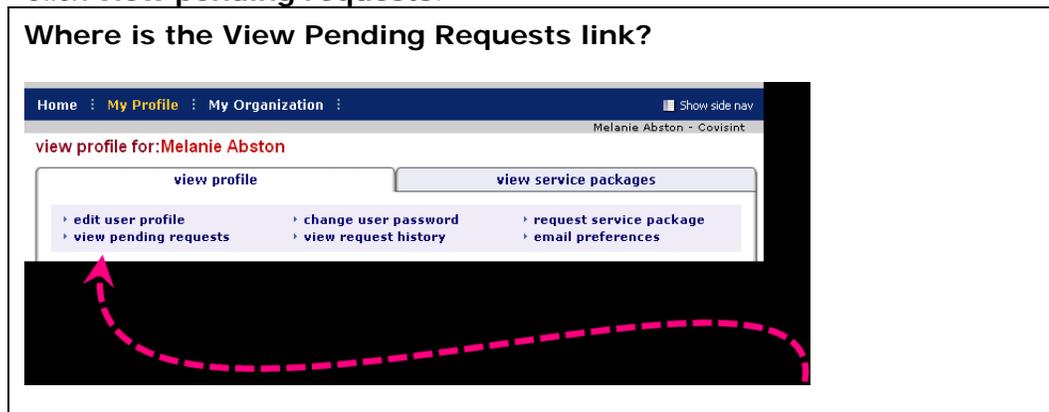
You have successfully requested service packages.

## Send Pending Request Reminder to Administrator

1. From the **My Profile** drop-down menu, click **View my profile**.



2. Click **view pending requests**.



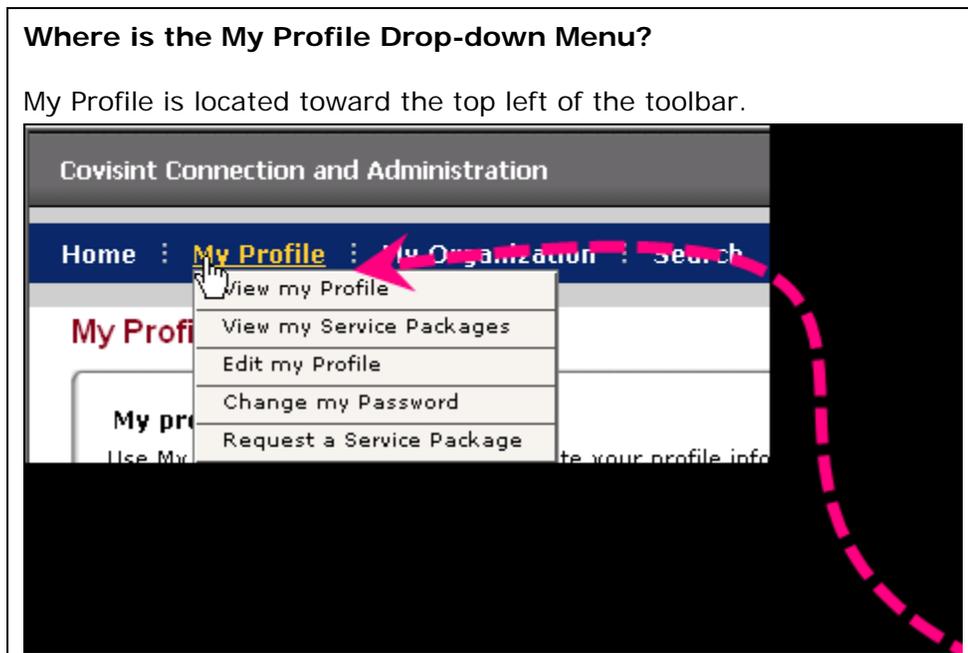
3. Enable the checkbox of each request
4. Click **Send Reminder**.
5. Key in the *reason for reminder*.
6. Click **Submit**.

### RESULT:

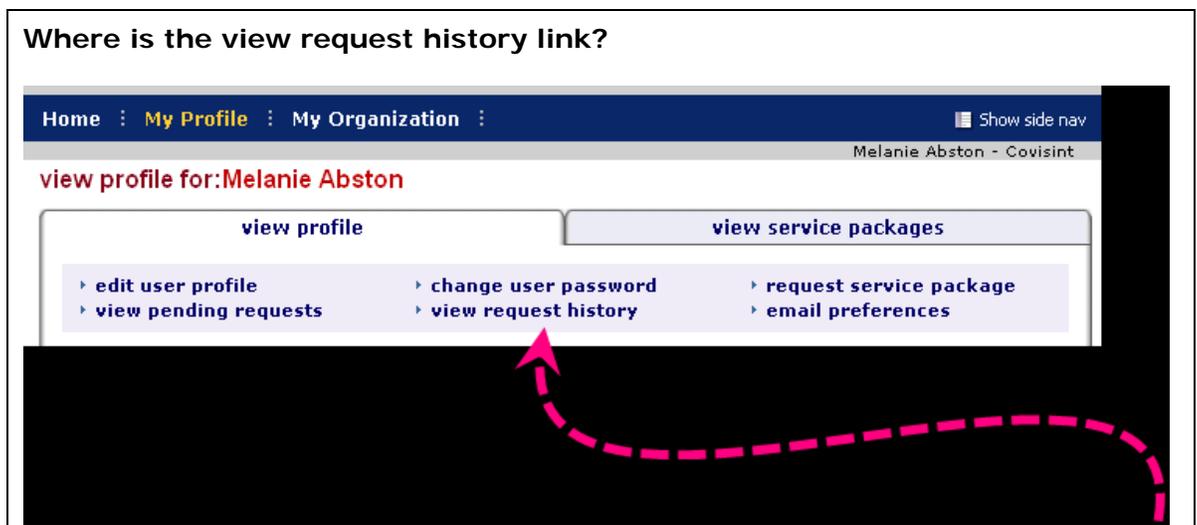
You have successfully sent a reminder to an administrator regarding your pending request.

## View History of Your Requests

1. From the **My Profile** drop-down menu, click **View my profile**.



2. Click **view request history**.

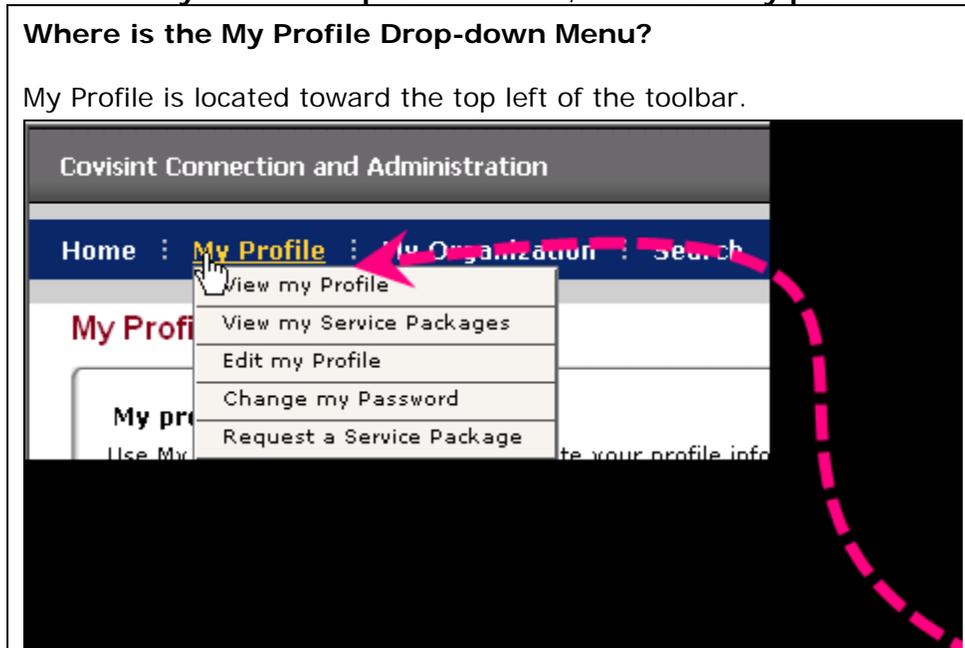


### RESULT:

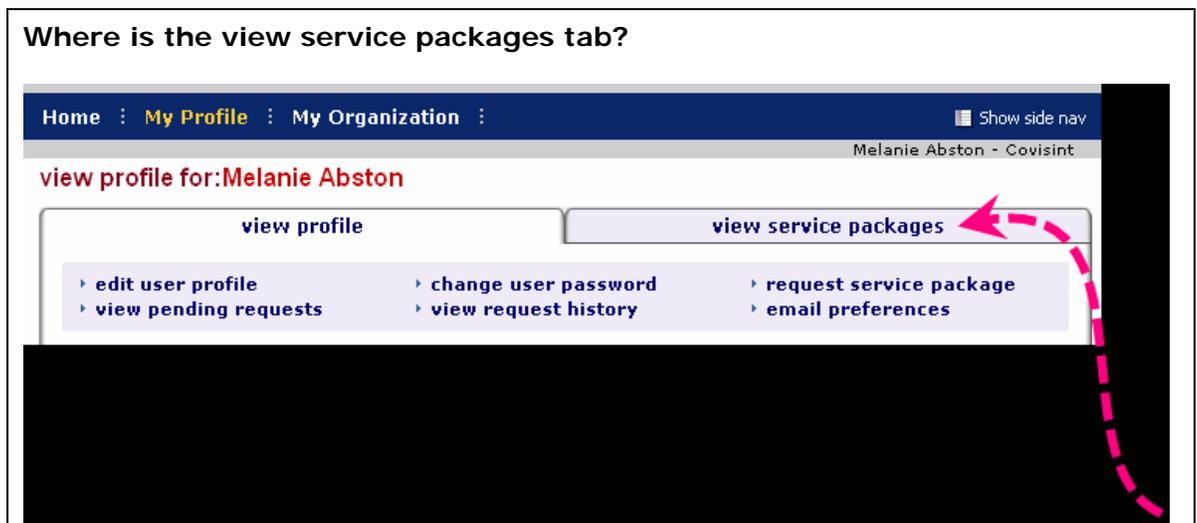
You have successfully viewed a history of your requests.

## View Your Current Service Package Grants

1. From the **My Profile** drop-down menu, click **View my profile**.



2. Click **view service packages** tab.



### RESULT:

You have successfully viewed your service package grants.

## View Your Organization Profile

1. Click **My Organization** drop down menu.



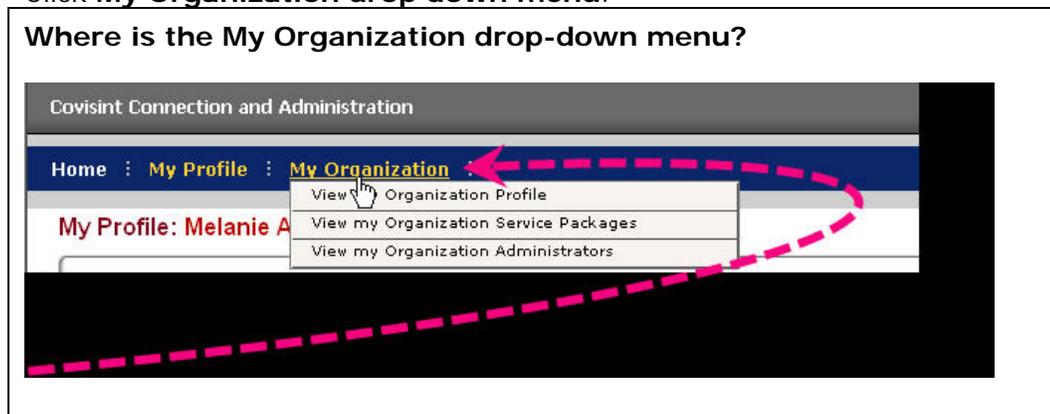
2. Click **view my organization profile**.

### RESULT:

You have successfully viewed your organization profile.

## View Your Organization Services

1. Click **My Organization** drop down menu.



2. Click **view my organization services**.

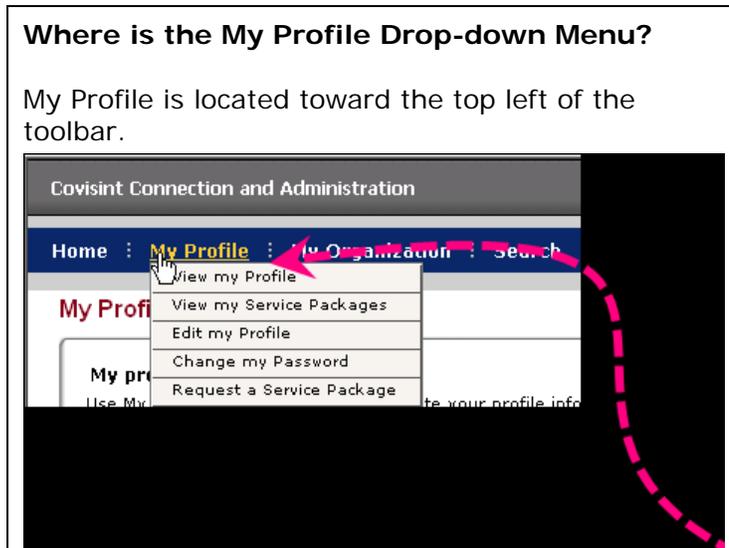
### RESULT:

You have successfully viewed your organization services.

## View Your Pending Requests

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1. From the **My Profile** drop-down menu, click **View My Profile**.



2. Click view pending requests.

### RESULT:

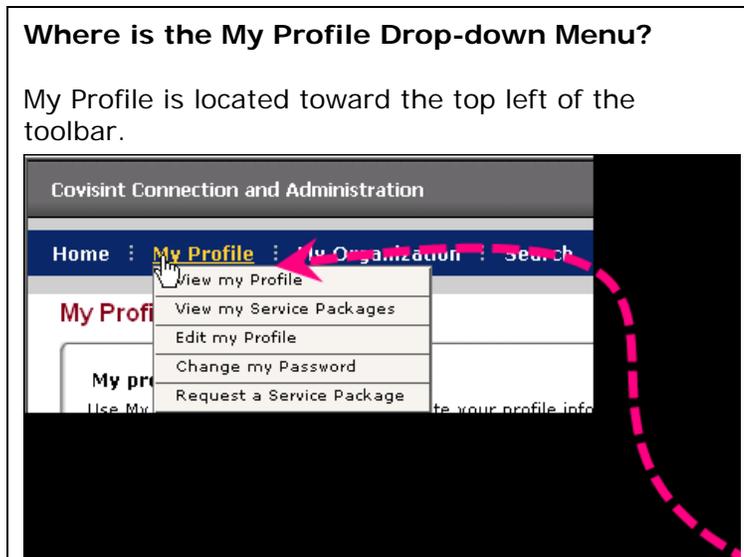
You have successfully viewed your pending requests.

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## View Your User Roles

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1. From the **My Profile** drop-down menu, click **View my profile**.



2. Scroll to the bottom of the screen to view the “user assigned roles” section. If you have roles assigned, they will be listed here.

### RESULT:

You have successfully viewed your user roles, if any are applicable.

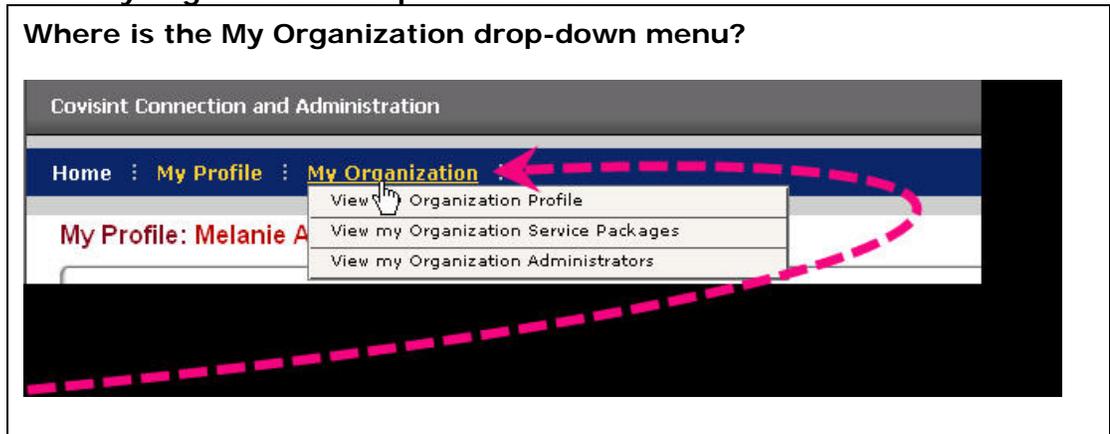
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## Who are my Organization Security Administrators

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Your organization Security Administrators are responsible for approving / rejecting your requests to service packages and suspending your account, among other things. They are also able to assist you with navigation and other questions.

1. Click **My Organization** drop down menu.



2. Click **View my organization administrators**.



What if the Security Administrator is no longer valid? You can change your administrator by submitting the [Security Administrator Change form](#).

### RESULT:

You have successfully viewed your Security Administrators.