How to Manage Proxies and Access

This document explains how Department ID managers can set access privileges for their staff to use the ITS Online Service Center application for ordering ITS telecommunications services and equipment and for viewing telecommunications reports.

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Overview of Access

If you are a Department ID manager, your access to the Online Service Center has been set up for you by ITS. Should you need to change who the Department ID manager is, please go to How to Request Access for information or talk to an M-Pathways representative at 936-7000. Online Service Center data is updated from M-Pathways weekly.

As a Department ID manager, you determine what level of system access to give to staff in your area. You can set access levels for individual staff members yourself, or you can designate proxies to do that for you.

You (or your proxy) will need to enter the ChartFields under each of your Department IDs that you want to make available for ordering services in the Online Service Center. Your staff will not be able to place orders until ChartFields have been entered, and therefore made available for their use.

Access Privilege Levels

There are four levels of access available in the Online Service Center: administrator, proxy, orderer, and support. Department ID managers have administrator access and can give access at the support, orderer, and proxy levels to their staff. The table on the next page lists the privileges associated with each level of access.
# How to Manage Proxies and Access

**People with this access level . . .**

<table>
<thead>
<tr>
<th>. . . can do these things</th>
<th>. . . cannot do these things</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator (Department ID manager)</td>
<td></td>
</tr>
<tr>
<td>• Give people proxy access.</td>
<td>• Give people proxy access.</td>
</tr>
<tr>
<td>• Make ChartFields available for use.</td>
<td></td>
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<tr>
<td>• Submit ChartField changes using the ChartField Change Request application.</td>
<td></td>
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<tr>
<td>• Set and change staff system privileges.</td>
<td></td>
</tr>
<tr>
<td>• Place and edit orders using a set of pre-selected ChartFields under as many Department IDs as you are authorized to use.</td>
<td></td>
</tr>
<tr>
<td>• Select items and put them in a shopping cart for future ordering.</td>
<td></td>
</tr>
<tr>
<td>• View shopping carts.</td>
<td>• Make ChartFields available for use.</td>
</tr>
<tr>
<td>• View order history and status.</td>
<td></td>
</tr>
<tr>
<td>• View Monthly Charge Detail Report</td>
<td>• Submit ChartField changes using the ChartField Change Request application.</td>
</tr>
<tr>
<td>• View Summary of Charges Report</td>
<td>• Set and change staff system privileges.</td>
</tr>
<tr>
<td>• View inventory &amp; Location Report</td>
<td>• Place and edit orders using a set of pre-selected ChartFields under as many Department IDs as you are authorized to use.</td>
</tr>
<tr>
<td>Proxy</td>
<td></td>
</tr>
<tr>
<td>• Make ChartFields available for use.</td>
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</table>
### Making ChartFields Available for Placing Orders

The Department ID manager decides which ChartFields under each Department ID that authorized users of the system can use when placing orders. No ChartFields are available until the Department ID manager, or his/her proxy, makes them available.

**NOTE:** You must have either administrator or proxy access to the system to work with ChartFields.

1. On the Main Menu page, under System Tools and Access, select a Department ID from the pop-up menu next to Manage Access. (People who do not have administrator or proxy access will not see the Manage Access option.)
2. Click the Go button next to the Department ID you selected.
3. On the Manage Access page, under the ChartFields heading, you will see a list of 10 lines with blank boxes, where you can enter ChartFields.
   
   Enter the ChartFields that you want to make available for phone ordering. If you want to enter more than 10 ChartFields, click the Add More ChartFields button at the bottom of the page.
HINT: Type a name in the Name box for a ChartField, and that name will be displayed instead of the ChartField number to the people whom you have given access.

4. Click the Continue button.

NOTE: Your web browser may show you a confirmation dialog box, asking if you want to remember the values you filled in. Click Never for this site.

5. On the Manage Access: Review page, review the list of ChartFields to be made available for use in the system.
   - If you need to make changes, click the EDIT button.
   - If you don’t need to make changes, click OK.

HINT: We are unable to remove any ChartFields that have been added to the Online Service Center. We suggest that you place a “DO NOT USE” note in the “Associated Name” box for any ChartFields that are no longer valid or in use.

Assigning and Managing Proxies

A proxy is someone who can act for the Department ID manager in the Online Service Center. A proxy can do everything in the system that the Department ID manager can, except for assigning and deleting proxies. Different proxies can be assigned to different Department IDs.

NOTE: You must have administrator access to the system in order to assign and manage proxies.

1. On the Main Menu page, under System Tools and Access, click the Manage Proxies link.

2. On the Manage Proxies page, you will see a list of your Department IDs. In the text box next to each Department ID, type the uniqnames of the person(s) to whom you want to give proxy access. If you enter more than one uniqname in a box, separate them by commas.

   To take away proxy access, delete the appropriate uniqnames.

3. Click the Continue button.

NOTE: Your web browser may show you a confirmation dialog box, asking if you want to remember the values you filled in. Click Never for this site.

4. On the Manage Proxies Review page, review your proxy assignments.
   - To make changes, click the edit button.
   - Otherwise, click Save to save your proxy assignments and return to the Main Menu page.

NOTE: Persons with proxy level privileges have the ability to view the Monthly Charge Detail report. Please make certain that is appropriate for each person designated as a proxy to have access to the following sensitive information associated with telephones, calling cards and authorization cards:
   - Time and Date of calls
   - Telephone numbers dialed
   - Length of calls
   - Charge of calls
Setting Up and Changing Access Privileges for Staff

**NOTE:** You must have either administrator or proxy access to the system to set up and change access privileges.

1. On the **Main Menu** page, under **System Tools and Access**, select a Department ID from the pop-up menu next to **Manage Access**.

2. On the **Manage Access** page for that Department ID, under the Users heading, you will see the four access levels listed. You can use the text boxes to add or remove the uniqnames of people to whom you wish to give or remove access. Separate uniqnames with commas.
   - Next to **Administrator Level**, you will see the uniqname of the Department ID manager. Only ITCom can give people administrator access.
   - Next to **Proxy Level**, you will see a text box if you have administrator access. You can add or remove uniqnames to this box to add or remove proxies. (If you have proxy, orderer, or support access, you will see a list of uniqnames, but you will not be able to make changes.)
   - Next to **Orderer Level**, you will see a text box if you have administrator or proxy access. You can add or remove uniqnames to this box to add or remove orderer access for people. (If you have orderer or support access, you will see a list of uniqnames, but you will not be able to make changes.)
   - Next to **Support Level**, you will see a text box if you have administrator or proxy access. You can add or remove uniqnames to this box to add or remove support access for people. (If you have orderer or support access, you will see a list of uniqnames, but you will not be able to make changes.)

   **HINT:** Just below the access levels, you can enter the uniqname of the person you would like your staff to contact when they need ChartField and access privilege changes made for the Department ID shown at the top of the page. (That person must have administrator or proxy access.) The Department ID manager’s uniqname will be used as the contact person unless you change it.

3. Click the **Continue** button.

   **NOTE:** Your web browser may show you a confirmation dialog box, asking if you want to remember the values you filled in. **Click Never for this site.**

4. On the **Manage Access Review** page, review your revised access privilege assignments.
   - To make changes, click the **Edit** button.
   - Otherwise, click **OK** to save your proxy assignments and return to the **Main Menu** page.

**Getting Help**

For help using this application, contact [ITComOSC.help@umich.edu](mailto:ITComOSC.help@umich.edu).

If the Department ID you want to use is new and has not yet been entered into the Online Service Center, contact your FinOps coordinator to make sure that the ID has been entered into M-Pathways.

For general questions about ITS telecommunications products and services, contact Customer Service at 763-2000 or [itcomcsr@umich.edu](mailto:itcomcsr@umich.edu).