

MANUAL: USER ACCESS ACCOUNT - PROCESSING ACCESS REQUESTS BY AN ADMINISTRATOR

To use applications made available on the Services Portal, it is necessary to use a HTML5-compliant browser with JavaScript support and cookies enabled. Internet Explorer is not supported – to use the application correctly, we recommend not to use this browser, regardless of its current version.

The administrator role might not be available in certain applications. The available roles can be seen from the application's request access form.

A person with an administrator role can manage access permissions to the application on behalf of the participant/entity who is a recipient of KDPW Group service. The administrator grants access to the application to other persons as well as has permissions to revoke access to the application from these persons. The administrator does not hold permissions to grant access to or revoke access from other persons acting with the administrator role. This role is created for each application made available within the access system separately.

To go to permissions management:

1. **Login to the access account** according to *Manual: User account in KDPW Group's online applications access system* – processing application access request.
2. **Go to permissions management.** You can do it from the “My desktop” view by using the “Manage permissions” button or directly from the “Permissions” view.

To review submitted access requests:

1. From the “Permissions” view, please select the “Submitted requests” option from the left menu.
In the “Submitted access requests” view you can see all access requests submitted for a service or services for which the user of the access account acts as an administrator. A request can be identified by selecting appropriate criteria in the filter list located above each column of the request list. An ID of the access request can be used as a selection criterion, too.

To approve a service request:

1. From the “Submitted access requests” view, choose an appropriate request with a “New” status by left clicking it.
2. Select the “Details” button located above the request list. The button becomes active only after you select a request.
In the details screen there are: data of the participant/entity on behalf of which the request has been submitted as well as the request's current processing status.
3. Choose the “Approve” or the “Reject” button. In the “Comments” field you can enter reasons for rejecting the request.

When you select the “Approve” option, the user who submitted the request will be automatically granted access permissions to the application. Selecting “Reject” will refuse access to the application. Selecting each option will change the status of the access request to approved or rejected accordingly. The information about request approval or rejection will be delivered to the user at the email address provided in the access request.

NOTE: By approving an access request for a user, the administrator grants the user authorisation to communicate with KDPW in the service.

To revoke access to an application from a user you can use two options available in the “Permissions” view:

by using the “Services” tab:

1. From the “Available services list” tab, please select a service by left clicking it.

In the “Available services list” there are all applications for which a person holds an administrator role.

NOTE: User permissions are revoked in each application they have access to separately.

2. Select the “Details” button located above the request list. The button becomes active only after you select a request.

3. Select the “Service details” tab from the “Permitted users” tab.

For each service available, an administrator can revoke permissions from each person who holds a user role for this application and who is visible in the “Permitted users” list.

4. From the “Permitted users” view, select an appropriate user by left clicking them.

You can find a user by selecting appropriate criteria from the filter fields located above the list.

5. Select the “Remove” button located above the user list. The button becomes active only after you select a user.

By using the “Remove” button you revoke access to the application from the person selected.

by using the “Users” tab:

1. From the “Users” view, select an appropriate user by left clicking them.

In this view there is a list of all persons representing a participant/entity who act in the applications to which the administrator has access. You can find a user by selecting appropriate criteria from the filter fields located above the list.

NOTE: User permissions are revoked in each application they have access to separately.

2. Select the “Details” button located above the request list. The button becomes active only after you select a user.

3. After the user data screen appears, go to the “Service access” tab.

4. From the “Has access to services” view, select a service by left clicking it.

5. Select the “Remove” button located above the service list. The button becomes active only after you select a service.

By using the “Remove” button you revoke access to the application from the person selected.

To review users’ permissions:

1. From the “Permissions” view select the option “Users” from the menu located on the left side of the screen.

2. From the “Users” view select a user by left clicking them.

In this view there is a list of all persons representing a participant/entity who act in the applications

to which the administrator has access. You can find a user by selecting appropriate criteria from the filter fields located above the list.

3. Select the “Details” button located above the request list. The button becomes active only after you select a user.
4. In the user data screen, there are thematic tabs which provide an administrator with the following information:
 - Account details – information that identifies user account
 - Access to services – a list of services to which a person has got access with a user role
 - Administers services – a list of services to which a person has got access with an administrator role
 - Submitted requests – a list of access requests submitted by a person, including the current status

To review service details:

1. From the “Permissions” view, select the option “Users” from the menu located on the left side of the screen.
2. From the “Available services list” view, select a service by left clicking it.
In the “Available services list” view there are all applications for which a user of an account holds an administrator role.
3. Select the “Details” button located above the request list. The button becomes active only after you select a service.
4. In the service data screen, there are thematic tabs which provide the following information:
 - Permitted users – a list of persons with access to a service with a user role
 - Service administrators – a list of persons with access to a service with an administrator role
 - Submitted requests – a list of access requests submitted by users and administrators in the service, including the current status