

User Account Request

Port Community System



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1. Introduction

This manual will instruct user, supervisor, domain administrator and application manager how to create and approve new user account requests.

The request procedure is built up from 4 different levels. For each level the user need a certain role associated with the user profile in the system.

It is a full administrative procedure; the actual user profile is configured by the application administrator after level 3 approval.

2. Account request structure

There are 2 different domains:

1. Account domain

The account requests are created for a certain account within the system. If a user is linked to multiple accounts, the user has access to the account requests for those accounts.

2. System domain

This is access to all account requests within the system, not limited by the association of the user with an account

Within PCS there is a separate menu that is available when you have rights to deal with account requests



[Account requests](#)

[User account requests](#)

[Global user account requests](#)

The first option User account requests is referring to the Account domain, the Global user account requests is referring to the System domain

The structure is based on 4 different levels:

1. A user that has the rights to insert a new account request within the account domain
2. A user that has the rights to approve the account requests within the associated accounts
3. A user that has the rights to approve all account requests within the system, after level 2 approval
4. A user that has the rights to configure the actual user profile for any account and confirms that the account request has been processed

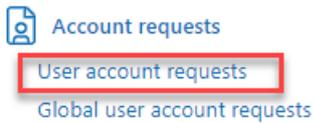
Each step within the procedure is logged individually. If an account request is rejected on any level the full account request is rejected, however individual approvals will remain visible.

You must have a PCS user to be able to insert and/or approve. In general, the first user that is associated with the account is the Supervisor. The Supervisor can do an account request for the second user etc. The Supervisor can also request the application manager to allow any of the account associated users to be set as level 1 user. In that case other persons within the organization (for example department heads) can do account requests, which can be approved by the supervisor.

3. Procedures per level

2.1. Level 1 | Requester

A user with this level (as right) can create new account requests.



This can be filled in by the requester:

Details

Account:

Salutation:

First name:

Last name:

Job title:

Contact information

Email address:

Mobile phone number:

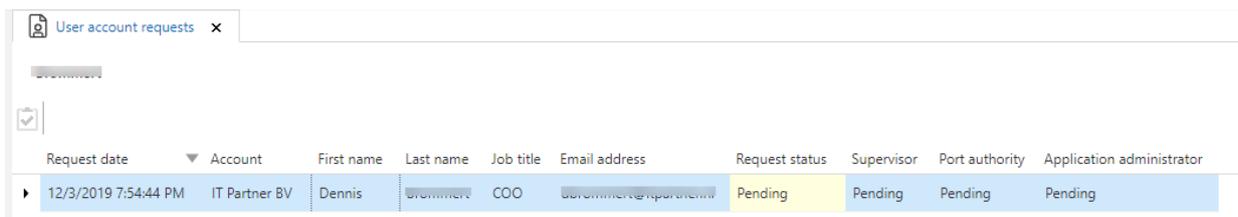
Request status

Request date:

Request status:

Requested by:

The overview screen shows the user account request, with its status just after completion:

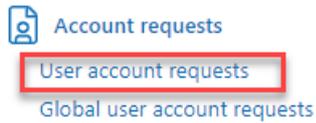


Request date	Account	First name	Last name	Job title	Email address	Request status	Supervisor	Port authority	Application administrator
12/3/2019 7:54:44 PM	IT Partner BV	Dennis	Browniere	COO	dbrowniere@partnerbv.nl	Pending	Pending	Pending	Pending

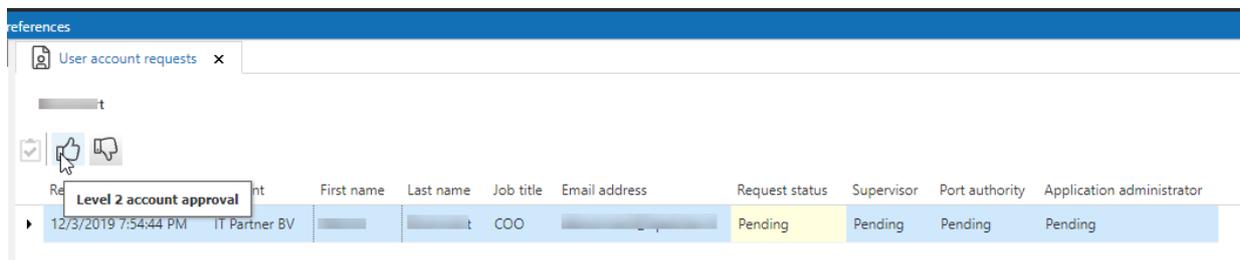
As a user you can only manage the details section. Approvals are available on the higher levels.

2.2. Level 2 | Supervisor

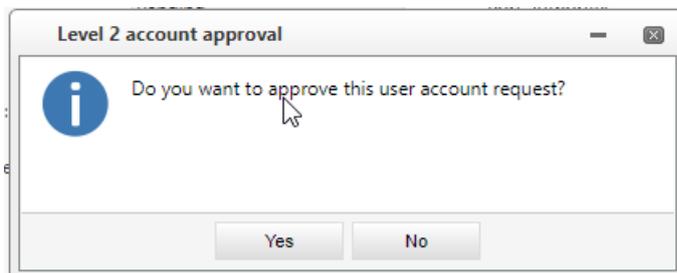
The Supervisor of an account can give the approval on level 2. Using the same menu option as the requester of level 1



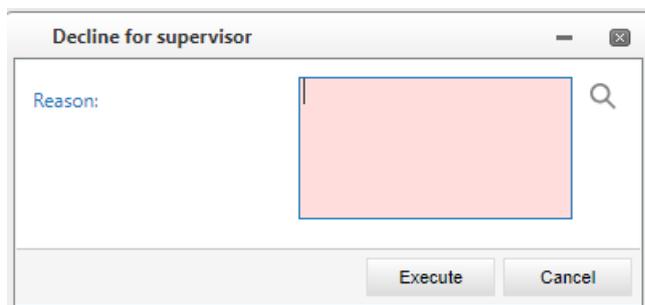
If there are pending requests, these will be shown in the list and there is a function to either *Approve* or *Decline*:



Approve by selecting the request and click on the *thumbs-up icon*.

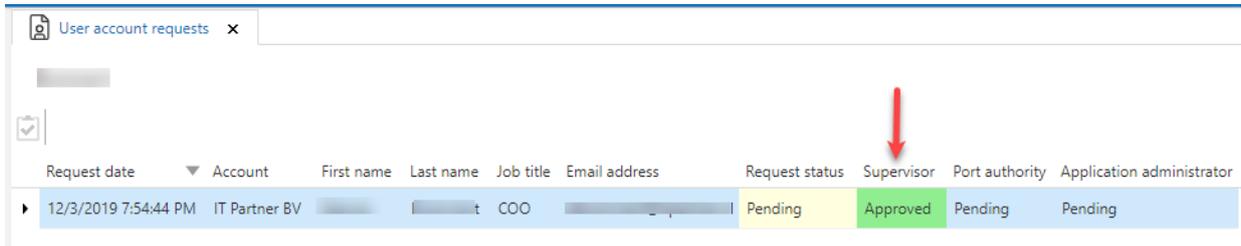


Decline by selecting the request and click on the *thumbs-down icon*.



Note: When you decline, you need to provide a reason

After approval the request is moved to the next level.



Request date	Account	First name	Last name	Job title	Email address	Request status	Supervisor	Port authority	Application administrator
12/3/2019 7:54:44 PM	IT Partner BV	[redacted]	[redacted] t	COO	[redacted]	Pending	Approved	Pending	Pending

Also, on detailed level you can see who and when the approval was done.

Account Authorization

Supervisor: Approved

Level 2 approval user:

Level 2 approval:

Level 2 decline reason:

After approval the request is moved to the next level.

Request date	Account	First name	Last name	Job title	Email address	Request status	Supervisor	Port authority	Application administrator
12/3/2019 7:54:44 PM	IT Partner BV	[Redacted]	[Redacted]	COO	[Redacted]	Pending	Approved	Approved	Pending

Also, on detailed level you can see who and when the approval was done.

Account Authorization

Supervisor: Approved

Level 2 approval user:

Level 2 approval:

Level 2 decline reason:

Port Approvals

Port authority: Approved

Level 3 approval user:

Level 3 approval date:

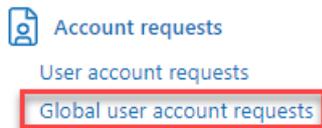
Level 3 decline reason:

2.4. Level 4 | Application manager

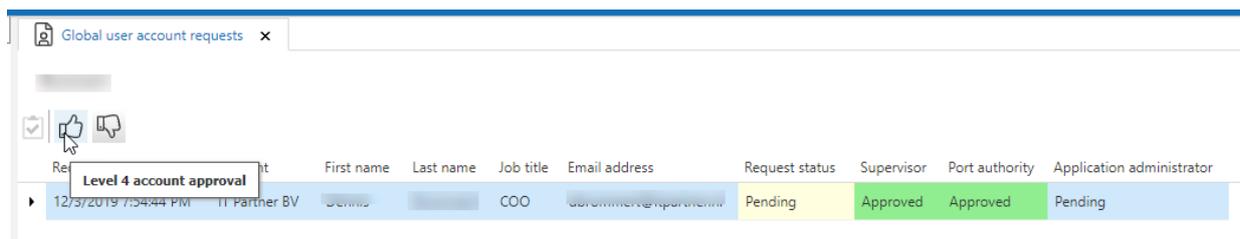
This final level is not a real approval but a confirmation that the user is fully configured within the system. The application manager will do 3 different steps:

1. Configure the user profile in PCS and set the roles associated with that user. The profile will have an initial password for first logon. The password is set as expired and must be changed at first logon to the system. Also, the user is set to have access using both password and token authentication
2. Inform the new user that the profile was created
3. Confirm the account user request in the system

In this case the user will use the following menu option:

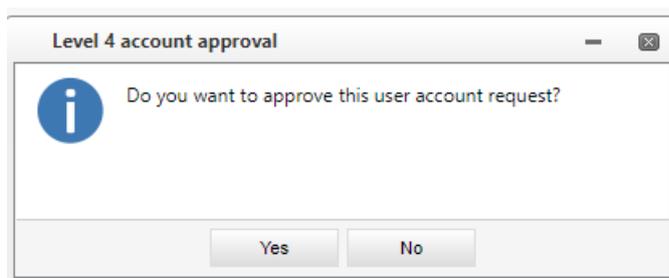


If there are pending requests, these will be shown in the list and there is a function to either *Approve* or *Decline*:

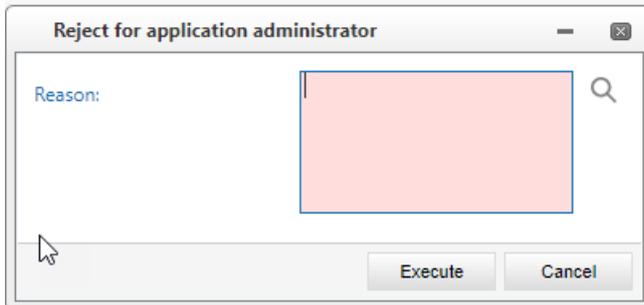


Ref	First name	Last name	Job title	Email address	Request status	Supervisor	Port authority	Application administrator
12/3/2019 7:34:44 PM	IT Partner BV	Denys	COO	denys@centerpcs.com	Pending	Approved	Approved	Pending

Approve by selecting the request and click on the *thumbs-up icon*.



Decline by selecting the request and click on the *thumbs-down icon*.



Note: When you decline, you need to provide a reason

After approval the request is completed.

Request date	Account	First name	Last name	Job title	Email address	Request statu	Supervisor	Port authority	Application ad
12/3/2019 7:54:44 PM	IT Partner BV			COO		Approved	Approved	Approved	Processed

Also, on detailed level you can see who and when the approval was done.

Details

Account: IT Partner BV

Salutation: Mr.

First name:

Last name:

Job title: COO

Contact information

Email address:

Mobile phone number: 8

Request status

Request date: 12/3/2019 7:54:44 PM

Request status: **Approved**

Requested by:

Account Authorization

Supervisor: **Approved**

Level 2 approval user:

Level 2 approval: 12/5/2019 1:39:36 PM

Level 2 decline reason:

Port Approvals

Port authority: **Approved**

Level 3 approval user:

Level 3 approval date: 12/5/2019 1:55:30 PM

Level 3 decline reason:

Executed

Application administrator: **Processed**

Level 4 approval user:

Level 4 approval date: 12/5/2019 2:17:05 PM

Level 4 decline reason: