



## Supplier Firm Admin: Manage Users and System Notifications

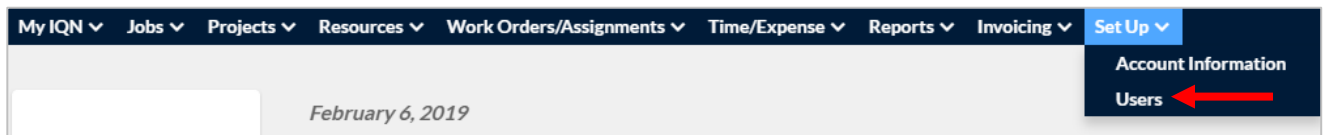
This job aid describes the duties assigned to the Supplier Firm Admin user role. The individual with this user role is able to:

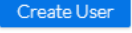
- Create User Profiles
- Edit a User's Personal Contact Info Record
- Reset User Passwords
- Process a User Profile System Reset (Password and Email)
- Disable User Access
- Reinstate User Access
- Enable/Disable System Notifications at the Supplier Firm Level

**NOTE:** Resource Profiles are different from Supplier Firm user profiles. Check the Help Menu list for job aids that explain how to create and manage Resource Profiles.

### To Create a User Profile (Supplier Firm)

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm appears.




3. Click **create user** (  ) in the in the list header bar. The **Personal Contact Info** profile screen opens.



*To create an IQN user profile is a two-part process. First you create the **Personal Contact Info** record. Then you create the **Login Information** record. Keep track of all the personal profile records you create in phase one so that you know how many login profiles you need to create in phase two.*

4. Fill in all required fields as indicated by the red asterisk (\*). Fill in any other fields as needed. You can use the <Tab> key to quickly move to the next data field.

 You can enter the email address of your choice. However, be aware that the user is prompted to enter an email as part of their initial login and this will replace the email address you entered.



**Personal Contact Info**

Actions: [Save](#) [Cancel](#)

**Basic Information**

Salutation: <-- select value --> ▼

First Name:\* \_\_\_\_\_

Middle Name: \_\_\_\_\_

Last Name:\* \_\_\_\_\_

Suffix: \_\_\_\_\_

Title:\* \_\_\_\_\_

**Email Addresses**

Standard Email:\* \_\_\_\_\_

Critical Email: \_\_\_\_\_

**Phone Numbers**

Primary Phone:\* +31 (0)345-544000 \_\_\_\_\_

Additional Phone Numbers: [Add New](#)

**Primary Address**

Country\* Netherlands ▼

Address Line 1\* PO Box 2016 \_\_\_\_\_

Address Line 2: \_\_\_\_\_

Address Line 3: \_\_\_\_\_

Address Line 4: \_\_\_\_\_

Town/City\* Hoofddorp \_\_\_\_\_

County: Nederland \_\_\_\_\_

Postal Code\* 2130 GE \_\_\_\_\_


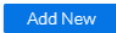
**Additional Address**


[Add New](#)

Actions: [Save](#) [Cancel](#)

\* indicates a required field.

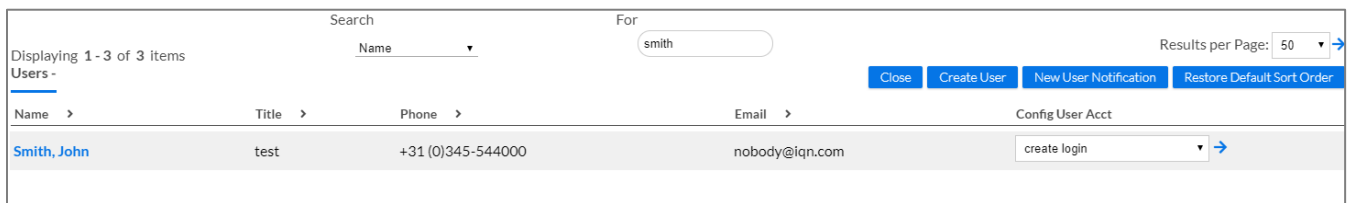


- Click **save** (  ) in the **Actions** section at the top or bottom when you are done. The system returns to the Users list. (Click **add new** (  ) if you want to create several profile records at one time.)
- Use the **Filter** and **Search** options found above the Users list to locate the profile(s) records you just created. Search categories include email, name, phone, title, and username. Enter a value in the **For** field that matches the selected search category and press **<Enter>**. The results list displays.

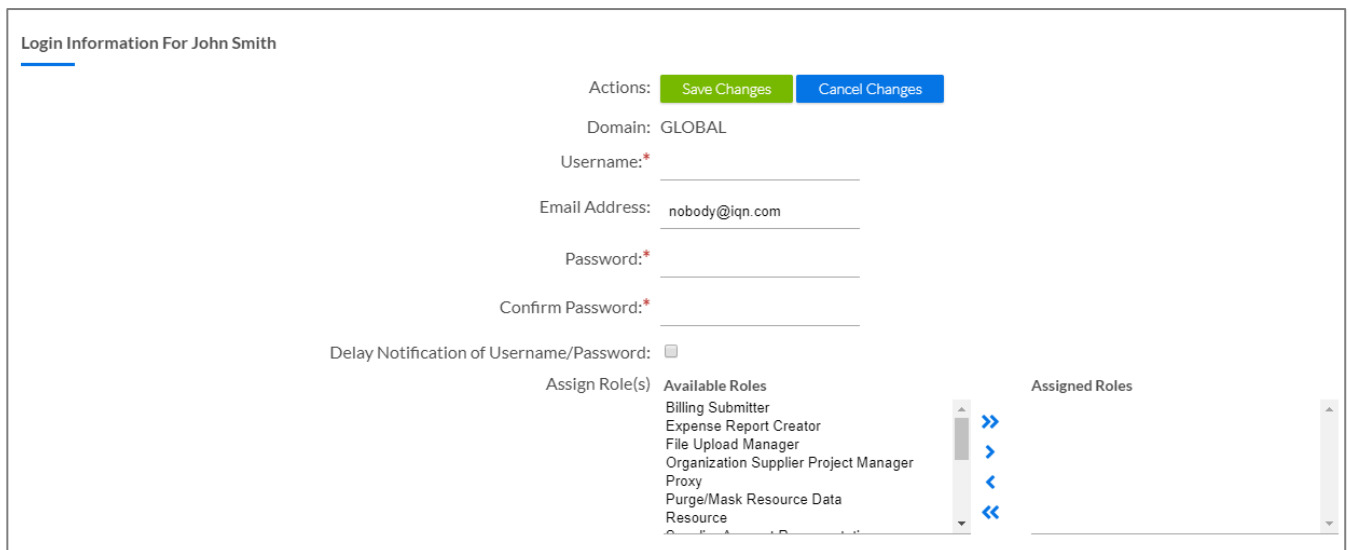
 Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.



- Scroll through the list to locate the profile record you need.
- Select **Create Login** in the **Config User Acct** column pull-down selection list.



- Click the **GO** arrow (  ). The **Login Information** record for that user opens.



Assign Role(s)	Available Roles	Assigned Roles
	Billing Submitter	
	Expense Report Creator	
	File Upload Manager	
	Organization Supplier Project Manager	
	Proxy	
	Purge/Mask Resource Data	
	Resource	



Can user enter time on behalf of associated consultants? ⓘ :  Yes  No

Can user enter expenses on behalf of associated consultants? ⓘ :  Yes  No

Locale: English - Netherlands ▾

Default Approval Workflow: There are no Approval Workflows to select.

Dashboard Configuration: <-- System Default --> ▾

Users allowed to login to no-login org:  Yes  No

Manually Maintained:  Yes  No

**Proxy Assignment** ⓘ




Add Proxy: <-- select value --> ▾

From: \_\_\_\_\_  To: \_\_\_\_\_  or indefinite


Selected Proxies:

User is Currently a Proxy for:

\* indicates a required field.

- Enter a **Username** and **Password**. Repeat the password in the **Confirm Password** field to verify.  
 **Be sure to follow all system/organization format requirements when you create a username or password.** Entries are case sensitive and may, or may not, require numbers and/or special characters. This is a temporary password and the user will be prompted to update to the password of their choice during their first login.
- Every system user must be assigned at least one user role. Highlight items in the **Available Roles** selection list, then click either the select > ( > ) or select all >> ( >> ) button to move the designated role(s) to the **Assigned Roles** column.  
*The **IQN User Roles – Supplier Job Aid** includes a detailed list with descriptions for all user roles. This job aid can be found in the IQN Help Menu.*  
 *Hold down the <Ctrl> key to select multiple user roles from the Available Roles list. Release the key **BEFORE** you click **select all**.*
- Use the radio buttons to indicate if the user is allowed to enter time and/or expenses on behalf of associated consultants. If you select “yes”, then the user needs to be assigned the role of Supplier Account Representative (SAR).
- Click **save changes** (  ) in the **Actions** section at the top of the record when you are done.
- Optional.*  A **Validation Error(s)** section displays if there are any data entry errors. Follow the prompts and adjust as needed, then click **save changes** again when you are done. Repeat until there are no errors.

**Validation Error(s)**

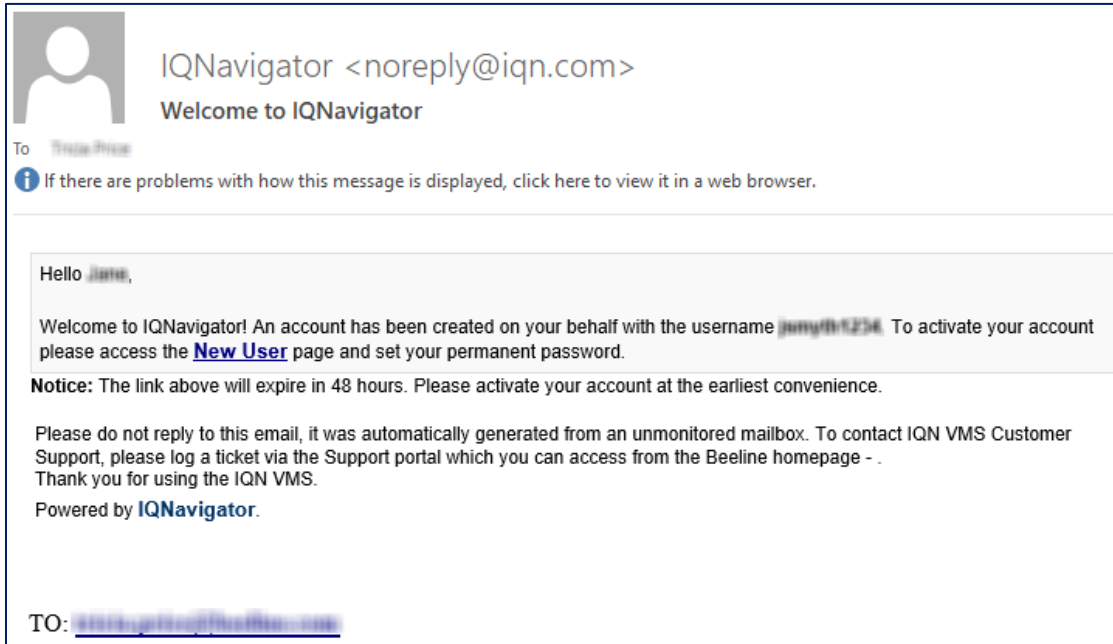
 Please correct the following validation errors:

- Username is a required field. Please make an entry.
- Password is a required field. Please make an entry.
- Confirm Password is a required field. Please make an entry.

Press [Alt]-[Tab] on the keyboard to display this window again after fixing a validation error.



- The system returns you to the Users list and an automated email notification is sent to the user. The notification includes their username and a link to the New User login page.



- Repeat Steps 6 through 15 for each profile record you created in Steps 3 through 5.

## To Edit a User's Personal Contact Info:

- Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
- Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm appears.




- Use the **Filter** and **Search** options to locate the user record that needs edits. Search categories include email, name, phone, title, and username. Enter a value in the **For** field that matches the selected search category and press **<Enter>**. The results list appears.

Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.



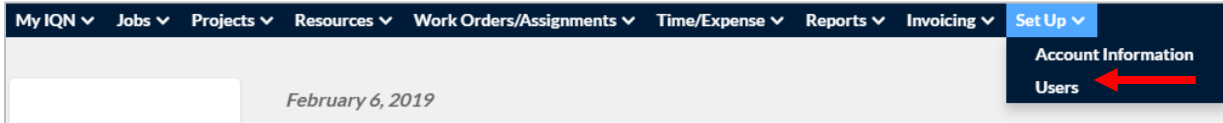
- Scroll through the results list to locate the profile record you need to update.
- Click on the user's name in the **Name** column to open their **Personal Contact Info** record.
- Make changes/updates as needed.




7. Click **save** (  ) in the **Actions** section at the top or bottom when you are done. The system returns to the Users list.

## To Reset a User Password:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm displays.

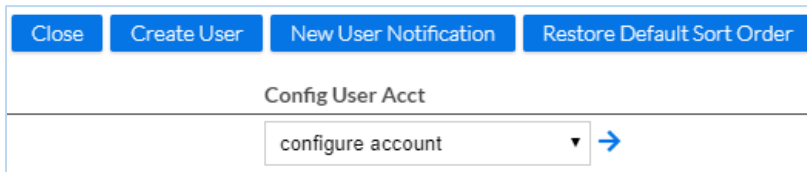


3. Use the **Filter** and **Search** options to locate the user record that needs the password reset. Search categories include email, name, phone, title, and username. Enter a value in the **For** field that matches the selected search category and press **<Enter>**. The results list appears.

 Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.



4. Scroll through the results list to locate the profile record you need.
5. Select **Configure Account** in the **Config User Acct** column pull-down selection list.



6. Click the **GO** arrow (  ). The **Login Information** record for that user opens.



Login Information For John Smith

Actions: Save Changes Cancel Changes

Domain: GLOBAL

Username:\*

Email Address: nobody@iqn.com

Password:\*

Confirm Password:\*

Delay Notification of Username/Password:

Assign Role(s)	Available Roles	Assigned Roles
	Billing Submitter	
	Expense Report Creator	>>
	File Upload Manager	>
	Organization Supplier Project Manager	<
	Proxy	<<
	Purge/Mask Resource Data	
	Resource	

- Enter a new password. Repeat the password in the **Confirm Password** field.
- Select **Reset Password to Above** in the **Change Password** pull-down selection list.
- Click **save changes** ( Save Changes ) in the **Actions** section at the top of the record when you are done.
- Notify the user that their password was reset and give them their new password.** The user must log in and update their password before the 48-hour expiration limit is reached or you will need to process another password reset. No system-generated email is sent to the user when you reset a password.

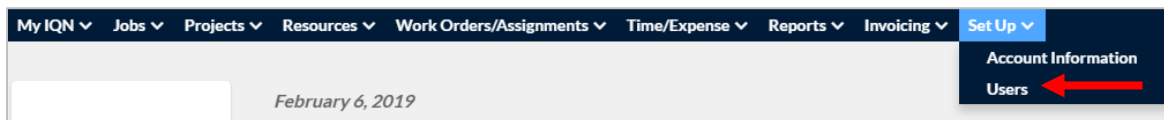


Any email sent to a user can include either a username or a password, but **never both** due to the requirements of Beeline's Information Security Policy. Best practice would be to include only the new password and the login address link.

If you prefer to use a method that includes an automated notification, then follow the instructions for a System Reset (which included a password reset) provided below.

## To Process a System Reset (Password and Email):

- Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
- Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm displays.



- Use the **Filter** and **Search** options to locate the user record that needs the system reset. Search categories include email, name, phone, title, and username. Enter a value in the **For** field that



matches the selected search category and press **<Enter>**. The results list appears.

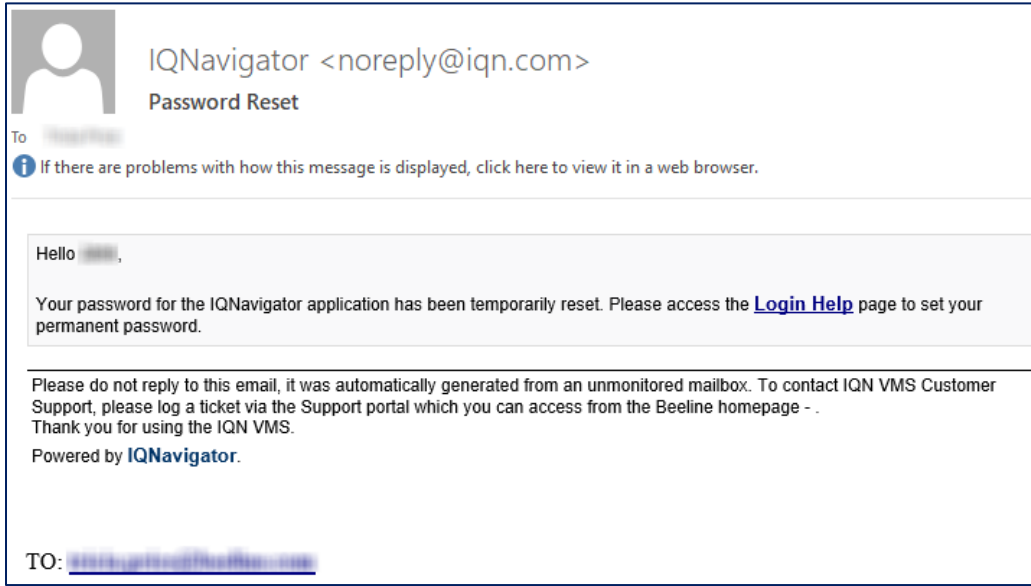
**⚠** Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.

4. Scroll through the results list to locate the profile record you need.
5. Select **Configure Account** in the **Config User Acct** column pull-down selection list.

6. Click the **GO** arrow (➔). The **Login Information** record for that user opens.

7. Select **System Reset and Send Password Reset Link** in the **Change Password** pull-down selection list.
8. Click **save changes** ( **Save Changes** ) in the **Actions** section at the top of the record when you are done. A system notification is sent to the user with a **Login Help** link. The link prompts the user to enter a new password and to validate their email address (if they have not previously done so) as part of the login process.





## To Disable a User's Access:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm displays.



3. Use the **Filter** and **Search** options to locate the user profile you want to disable. Search categories include email, name, phone, title, and username. Enter a value in the **For** field that matches the selected search category and press **<Enter>**. The results list appears.

Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.



4. Scroll through the results list to locate the profile record you need.
5. Select **Configure Account** in the **Config User Acct** column pull-down selection list.





- Click the **GO** arrow (➔). The **Login Information** record for that user opens.
- Click the checkbox in the **Disable User Login** field.

Login Information For Supplier \*Manager1

Actions: Save Changes Cancel Changes

Domain: GLOBAL

Username: \* hwasdf

Email Address: nobody@iqn.com

Password: \_\_\_\_\_

Confirm Password: \_\_\_\_\_

Change Password: No Change

➔ Disable User Login:

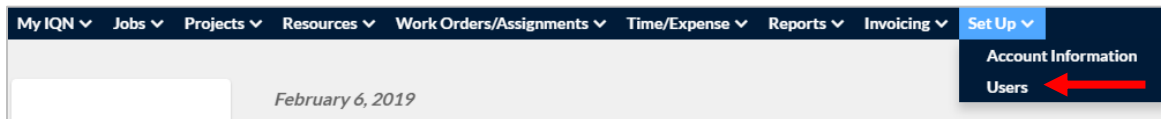
Assign Role(s)

Available Roles	Assigned Roles
Expense Report Creator	Billing Submitter
Resource	File Upload Manager
Supplier Onboarding Administrator	Organization Supplier Project Manager
Timecard Adjuster	Proxy
Timecard Creator	Purge/Mask Resource Data
	Security Administrator
	Supplier Account Representative

- Select all Assigned Roles in the **Assign Role(s)** section and click the **remove all** button (⏪) to move them over to the Available Roles list.
- Click **save changes** (Save Changes) in the **Actions** section at the top of the record when you are done. The Users list screen reappears.

## To Reinstate a User's Access:

- Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
- Hover over the **Set Up** tab in the Header Menu bar and click **Users**. The **Users** list screen for your supplier firm displays.



- Set the **Filter** and **Search** option to either Disabled Accounts or All Accounts. Select a Search option for the For field. Options include email, name, phone, title, and username. Enter a value in the **For** field that matches the selected search category and press **<Enter>**. The results list appears.

**⚠** Your cursor must be **INSIDE** the **For** box when you click **<Enter>** to trigger the search.

Filter: Active Accounts ▾ ➔

Search: <-- select value --> [dropdown]

For: [input field]

Results per Page: 50 ▾ ➔

Displaying 1 - 50 of 3075 items


Users -

Name	Title	Email	Config User Acct
*Manager1, Supplier	Test	nobody@iqn.com	configure account



Buttons: Close, Create User, New User Notification, Restore Default Sort Order

- Scroll through the results list to locate the profile record you want to reactivate.
- Click the name hyperlink in the Name column. The user's Personal Contact Info record opens.



6. Make updates/adjustments as needed to the contact information. Be sure the Standard Email field is a valid email address to which the user has access!
7. Click save (  ) to save your changes and return to the Users list.
8. Repeat Steps 3 and 4.
9. Select **Configure Account** in the **Config User Acct** column pull-down selection list.

10. Click the **GO** arrow (  ). The **Login Information** record for that user opens.
11. Uncheck the checkbox in the **Disable User Login** field.

12. Highlight items in the **Available Roles** selection list, then click either the select>> (  ) or select all >> (  ) button to move the designated role(s) to the **Assigned Roles** column (section highlighted above in yellow.)

*The **IQN User Roles – Supplier Job Aid** includes a detailed list with descriptions for all user roles. This job aid can be found in the IQN Help Menu. Every system user must be assigned at least one user role.*




*Hold down the <Ctrl> key to select multiple user roles from the Available Roles list. Release the key **BEFORE** you click **select all**.*

*If the user is allowed to enter time and/or expenses on behalf of associated consultants, then the user needs to be assigned the role of Supplier Account Representative (SAR).*

13. Enter a temporary password in the Password field and repeat it in the Confirm Password field.



Your password must meet the minimum password requirements. The password must have a minimum of seven alphanumeric characters, at least one uppercase letter, at least one lowercase letter, at least one symbol, and at least one number.

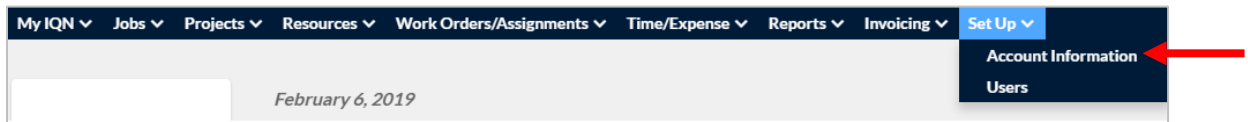
14. Set the Change Password field to Reset Password to Above.
15. Review all other fields and make adjustments as needed. Be sure the Email Address field is a valid email address to which the user has access!
16. Click **save changes** (  ) in the **Actions** section at the top of the record when you are done. The screen returns to the Users list.
17. Notify the user that their access to IQNavigator has been reactivated. Provide them with the login URL, their username, and their temporary password. They will be prompted to create a new password when they log in.



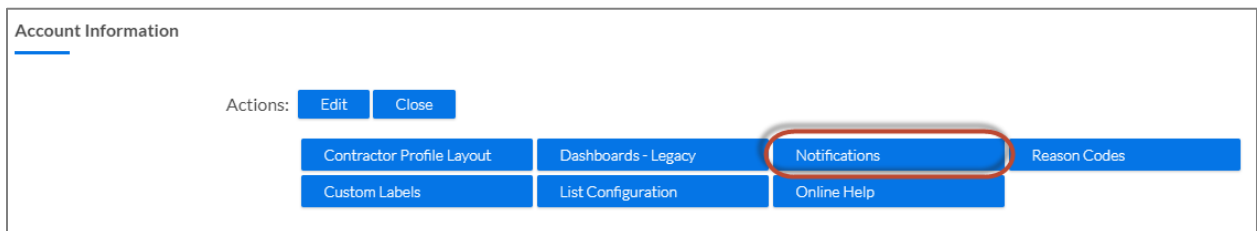
**Please Note:** Any email sent to a user can include either a username or a password, but **never both** due to the requirements of Beeline’s Information Security Policy.

## To Enable/Disable Supplier Firm System Notifications:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the **Set Up** tab in the Header Menu bar and click **Account Information**. The **Account Information** screen for your supplier firm displays.




3. Click the **notifications** tab in the Actions section located at the top of the screen. The Notifications screen displays.



4. Use the checkboxes to select/deselect system-generated notifications for your supplier firm. **NOTE:** ALL notifications are selected by default and are listed in sections by user role.
5. Check the notifications rules settings and adjust as needed. These settings include:
  - **Honor notification rules:** Assign notifications based on where the transaction occurs or where the user is set up. This is helpful for supplier firms that have multi-level organization hierarchy structures where all users are set up in the supplier firm enterprise organization but assigned to different supplier firm “child” organizations.
  - **Due to Off Board Notification:** Set the number of days from the assignment end date to send the Off Board notification.



- 
- **Allow users to opt out of email notifications:** Yes/No. If set to “yes”, then use the Select User Opt Out Notifications selection boxes to choose the notifications from which the user can opt out. This will create a Notifications section on the User Profile record that allows each user to indicate which notifications they do not want to receive.
  - **Individual User Report Notification:** Yes/No. If set to “yes”, then individual users receive various reports via email specific to them and their supplier firm.
6. Click the **save changes** button (  ) in the Actions section to save your adjustments and exit this screen.