How to Create and Approve New Members

Each individual in your organization that you wish to provide access to Maintenance Connection must complete a “sign up” process and receive membership approval. The signup and membership approval process ensures that only authorized individuals have access to your data, and that each member is associated with the correct set of access permissions (rights to access data and features/functions in MC).

**Note:** Customers that have purchased one of our LDAP/Active Directory Integrations should contact Maintenance Connection for assistance with membership and approval issues, as this document is not applicable to such configurations. Similarly, customers that wish to utilize an “anonymous login” process for Service Requesters should refer to the Service Requester Integration section of the User Guide, as membership creation and approval is not required.

Refer to the following sections for information on creating and approving new members:

- **First Time Login/Sign Up:** Instructions for signing up for the first time.
- **Approve New Members:** Instructions for approving new members, assigning them to the correct access group and integrating them into the Labor/Requester Modules. Instructions for approving members in “batch” are also provided.
- **Sign Up Instructions for Staff:** Information on sending your staff an email with sign-up instructions.
- **Administrator Signup:** Items to consider if System Administrators will be completing the “Sign Up Process” on behalf of members.

**Tip for Finding Connection Key:** Whenever a user signs up for Maintenance Connection, they will be prompted to identify your organization’s Connection Key. To find your organization’s Connection Key: Select Tools->Service Requester Configuration from the Menu Bar and then select the Integration Tab. The Connection Key (“XYZ” in the following example) is listed at the end of the first paragraph.
First Time Login/Sign Up
To create an initial membership record, each staff member must follow the first time sign up process:

1. Open Internet Explorer and enter the correct Maintenance Connection URL:
   - Online Customers: www.maintenanceconnection.com
   - Onsite Customers: http://servername/mc_web
     (Contact your IT Department if you do not know the servername/path)

2. The Maintenance Connection Welcome Page will display. Click the LOG IN Button:

3. The Login Page will display. Below the prompts for Member ID and Password, click on the link for “Want to sign up?” or “Need to sign up for the first time?”. The wording that displays depends on whether your installation is onsite or online:
4. The first Sign Up Page displays, prompting you to indicate whether or not you are already a member of Maintenance Connection. Leave the indicator marked on “I am NOT a Member” and click OK.

![Image](image1.png)

**Note:** The “I am an existing Member” option is only used in the unusual circumstance when a user maintains membership in multiple databases.

5. You will be prompted to enter your organization’s “Connection Key”. Enter the correct “Connection Key” and click OK:

![Image](image2.png)

**Tip for System Administrators:** To locate your “Connection Key,” select Tools->Service Requester Configuration from the Menu Bar in Maintenance Connection, and then select the Integration Tab. The Connection Key (“XYZ” in the example at right) is listed at the end of the first paragraph.
6. You will be prompted to enter information about yourself and identify your Member ID and Password. All fields marked with an orange asterisk must be completed:

- **Profile:** Enter your personal information.
- **Member ID:** Enter the Member ID you wish to use each time you access the system. This Member ID must uniquely identify you in the system and must be a minimum of six characters.

  **Note:** Since online customers are accessing a common Membership Database, it can be more difficult to identify a Member ID that has not already been chosen by another user. Online customers should consider using a more comprehensive naming convention. Some customers use full name ("cindyjsmith"), while others place a company prefix in front of the ID ("XYZcsmith").

- **Password:** Enter and re-enter the password you wish to use.

  **Note:** Minimum requirements for passwords depend on settings established at your organization. As your mouse enters the password field, the minimum number of characters required will be displayed below the field prompt (six or eight). It should be noted that passwords cannot be the same as your Member ID.

- **Forgot My Password:** In the Forgot My Password section, enter the question to be used by the system in the event you forget your password. Enter an answer you will remember.

- **Repair Center:** Specify the Repair Center with which you are associated. If your organization only utilizes one Repair Center, only one value will be available.

- **Terms of Use:** Scroll down and read the complete Maintenance Connection Terms of Use. When you have completely reviewed these terms, indicate your acceptance of these terms by checking the “I have read and accept the terms of use” control.
7. When you have finished entering information on this page, click **OK**.

   - If all fields were completed correctly, you will receive a confirming message, indicating that your membership request will be forwarded to a System Administrator for approval. You will also receive an email, indicating that your request is pending approval.
   - If there are any issues with the information provided, such as the selection of a password that does not meet the minimum requirements identified by your organization, you will receive a warning to correct the information.

8. Once the System Administrator has approved your membership request, you will receive an additional email, indicating that you can proceed to access the system, using the Member ID and Password you defined in the sign up process.

Refer to the following sections for information on [Approving New Members](#) and [Sending Sign Up Instructions to Staff](#).
Approve New Members

Once users have requested membership through the “First Time Sign Up Process,” they must be approved by a System Administrator. When a System Administrator with permission to “approve” members logs into Maintenance Connection, a red “reminder” task is displayed on the Home Page:

![Membership Info](image)

**Note:** This prompt is filtered by the Repair Center specified on the Home Page. If a new member request is not visible upon login, try changing the Home Page Repair Center.

Following are instructions to “individually” approve members. Refer to the section on [Batch Membership Approval](#) for instructions on approving multiple members in a single step.

To **individually approve** new members:

1. Go to the **Members Module** by clicking the reminder on the Home Page. The Members Module will open with any members awaiting approval automatically displayed in the Member Explorer.
   - Alternatively, you can open the **Module Menu** and select Members. To filter the Member Explorer to only those members awaiting approval, select “**Waiting for Approval**” from the Filter Dropdown in the Member Explorer.

   ![Module Menu](image)

   **Note:** This list is filtered by the Repair Center specified on the Home Page. If a new member is not visible, try changing the Home Page Repair Center.

2. Select the first member to approve. The Member Detail Page will display, prompting you to approve and define an access group.
3. To approve this member, click the “Approved” Control.

- Designate the “Access Group” to which this member should belong. An access group must be defined for all new members. This Access Group determines the modules, features and capabilities that will be available. You can use the Access Group Lookup to select an access group for the new member.

- Upon selecting an Access Group, the “Applications” Field Prompt will automatically populate with the default value defined for this group. For example, selecting a “Requester” Access Group will populate the “Applications” field with “R-Service Requester,” indicating that this user should be taken directly to the Service Requester and have access to no other Maintenance Connection Applications.

**Note:** This setting controls the applications that will be available to the user (through the Application Chooser during login). You can change the default value for this specific member as needed.

<table>
<thead>
<tr>
<th>Application Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MGR</td>
<td>Provides the user with access to all System Applications (MRO, Technician WorkCenter, Service Requester and Reporter).</td>
</tr>
<tr>
<td>MGRD</td>
<td>Provides the user with DIRECT access to the full MRO (Maintenance, Repair and Operations WorkCenter), without having to select an Application from the Application Chooser at login.</td>
</tr>
<tr>
<td>R</td>
<td>Provides access to only the Service Requester.</td>
</tr>
<tr>
<td>RPT</td>
<td>Provides access to the Reporter and the Service Requester.</td>
</tr>
<tr>
<td>TWC</td>
<td>Provides access to only the Technician WorkCenter.</td>
</tr>
<tr>
<td>TWCRPT</td>
<td>Provides access to the Technician WorkCenter and the Reporter.</td>
</tr>
<tr>
<td>DASH</td>
<td>Provides access to only the KPI Dashboard.</td>
</tr>
</tbody>
</table>
4. Indicate any special **session time out** that should be in effect for this member. The session time out indicates the number of minutes that should be allowed to pass without interaction with the system before the member is “timed out” of their login session. If this field is set to “0”, the system default value for the organization will be used (typically 30 minutes).

5. Indicate how this new member should be integrated into the Labor or Requester Module. All members of the system are maintained as either a Labor or Requester record.

   - If no current labor or requester record exists for this member (most situations), a new labor or requester record should be made for the user by leaving the **default first option selected**. If the member is only being provided access to the Service Requester Application, a Requester Record will be created and linked to the Member Record. For all other members, a Labor Record will be created and linked.

   - If an existing labor or requester record already exists for this member (record was manually added or imported), indicate that the member should be linked to an existing record by selecting the second option in the available control. A new Labor/Requester field will display, allowing you to click on the lookup to locate and select the record to which this member should be linked. You can use the Type Filter Control in the upper left of the Labor/Requester Lookup to assist in locating the correct record (Employee, Contractor or Requester).

**Note:** See the section on **Labor/Requester Integration** for additional information on the relationship between Member and Labor/Requester Records.
6. Once all fields on the Member Detail Page have been specified, click the **Save** Button on the toolbar. The approval will be processed and the new member will be sent an email indicating that access to the system has been enabled.

- If “Create a new Labor or Requester record” was indicated, a new Labor or Requester Record will be created (type based on the value you enter in the Applications Field). The new record will have a Labor/Requester ID matching the specified Member ID. If a record already exists with that ID, an incremental number will be added to the ID (e.g., JSMITH-2).

**Tip:** Refer to the following sections for more information on [Labor/Requester Integration](#) and [Batch Membership Approval](#).

---

**Labor/Requester Integration**

Each member approved in Maintenance Connection is associated with a Labor or Requester Record (based on the type of user). In some organizations, Labor and/or Requester Records are pre-populated in an import, providing an expedient method to ensure that consistent data is in place for all staff, including contacting information, job titles, etc. If no pre-existing records exist, a new Labor/Requester Record is created automatically during the above defined [Member Approval Process](#). The type of data stored in the Member Record and respective Labor/Requester Record is shown in the following diagram.
Batch Membership Approval

If you have multiple membership requests to approve, you can process similar requests in a single step. **This option can only be used if there is no existing Labor/Requester Record for the members, as a new record will be created by default upon approval.** That is, you will not have the option to “link” the new members to existing Labor/Requester Records.

To approve multiple members:

1. Go to the **Members Module** by clicking the reminder on the Home Page. The Members Module will open with any members awaiting approval automatically displayed in the Member Explorer.
   - Alternatively, you can open the **Module Menu** and select Members. To filter the Member Explorer to only those members awaiting approval (or currently disabled), select “**Waiting for Approval**” from the Filter Dropdown in the Member Explorer:
   
   ![Filter Dropdown Example]

2. Click the **Explorer** Button on the Toolbar to access the Expanded Explorer:

   ![Expanded Explorer]

3. The Expanded Explorer will display, allowing you to select multiple records to approve. Click inside the checkbox to select each member to approve in batch. Since this process will use the same “Access Group” and “Application Access” for all selected records, be sure to only select records that will have these settings in common.

4. Once all desired records have been identified, click the **Approve** Button on the Action Bar at the bottom of the page.
5. A dialog will display, warning you that this process should only be used if there are not existing Labor/Requester Records for these new members. You will be prompted to identify an **Access Group** and **Application Access** for all identified records. Specify the correct values, exactly as described in the instructions for [approving individual records](#):

![Approve Members]

6. Once the Access Group and Applications have been defined, click the **Apply** Button.

7. The new members will be approved and will be sent an email indicating that access to the system has been enabled.

8. For each member approved, a new “labor” or “requester” record will be created (type based on the value you enter in the Applications Field). The new record will have a Labor/Requester ID matching the Member ID. If a record already exists with that ID, an incremental number will be added to the ID (e.g., JSMITH-2).

**Tip:** Refer to the above section for more information on [Labor/Requester Integration](#).
Sign Up Instructions for Staff

To assist organizations in announcing the availability of Maintenance Connection, a feature is available to generate email instructions. To generate an email to staff:

- Select **Tools->Service Requester Configuration** from the Menu Bar.
- Select the **Integration Tab** and click the **Email Button**.

An email draft will display, populated with a template of instructions to send to desired recipients. Prior to sending the email:

- Specify desired recipients in the address line and first line in the email body.
- Verify that the correct server address is listed.
- Note the inclusion of the Connection Key, which will be used by staff members.
- Add or modify the content as desired.
Administrator Sign Up of Members

There are a number of circumstances under which System Administrators complete the sign-up process on behalf of members. Following are some considerations to keep in mind:

- Forgot My Password prompts are set during the “Sign Up” Process. As such, if an administrator will be signing up members, this feature will not be of value to them (as they will not have the opportunity to establish desired values). It should be noted that the Password Management Feature can be used at a later date to populate more accurate information obtained on behalf the member.
- Once the new member has been established and given their login credentials (Member ID and Password), they should be instructed to use the options on the Home Page to change their password. In the Technician WorkCenter, Change My Password is accessed from the Profile Tab.

In the MRO, the Change Password option is accessible from the Security Tab: