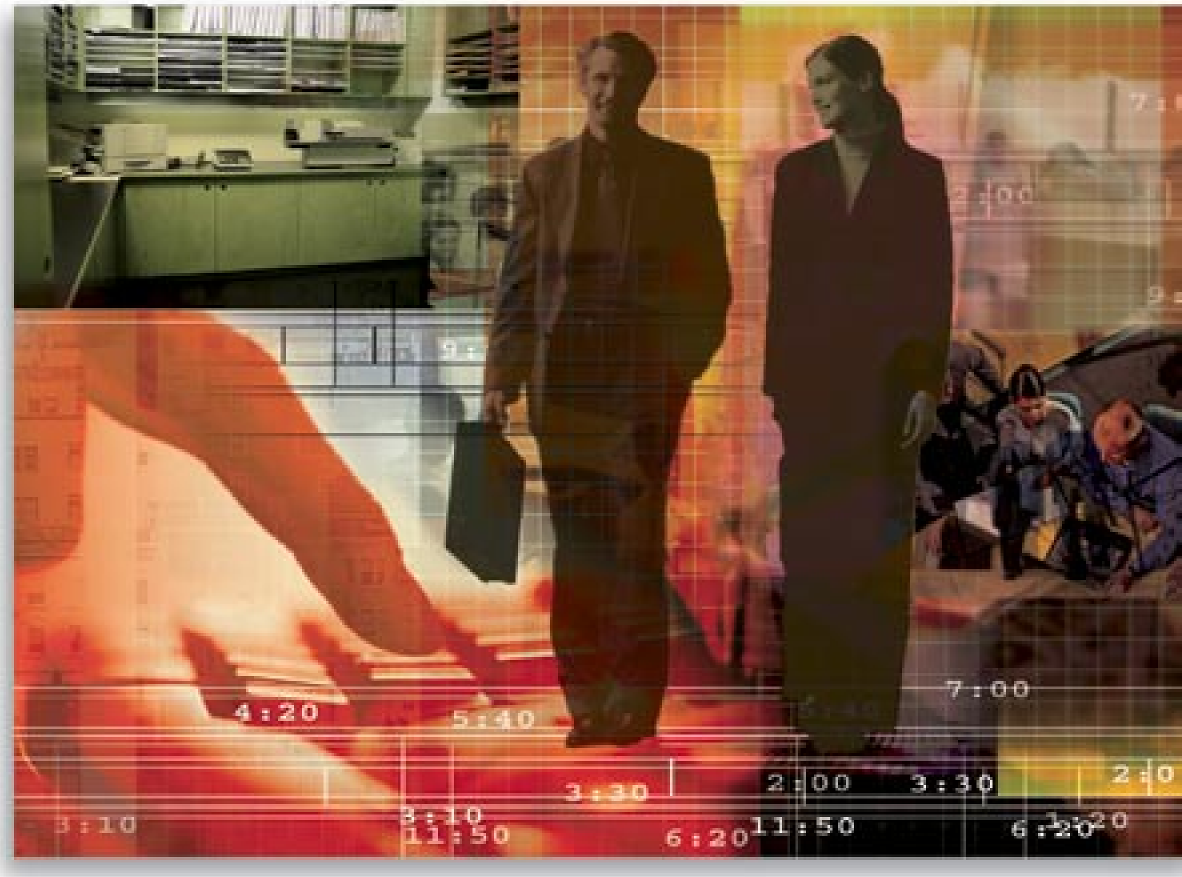
SmartSecurity
User Guide

SmartOffice®



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Introduction

The Security within SmartOffice® is used to control how the office and its users function within the application. SmartOffice security is broken down into the Office Setup and User Setup categories. The Administrator for the office manages the office security, office posting behaviors, user creation default settings, user visibility, user roles and licenses for its users. Each user then defines their preferences. In order to make any of the user security changes effective for the user, make certain that the user is logged out while the changes are made, or simply advise the user to log out and log back in to apply the new changes to the user security.

Basic Concepts

Office Security

Office Security can be set either on or off. When Office Security is turned off, all records in the office display to all users. When Office Security is turned on, if the user Assignment List is empty, all users can view the records. However, if the Assignment List is populated, the records are only visible to those who are directly assigned and to the users who have access to the other users in the office through user proxies.

User Assignments

User Assignments are essential to keeping contact records visible only to the applicable users. The Assignment List is mainly used when office security is enabled. The application will only allow for those users with assignments to the contact records to modify the corresponding User Assignment list. A contact can be assigned to users both within and outside the proxy list. When a user designates an assigned record as private, the other assigned users' access will override the Private List.

User Proxy

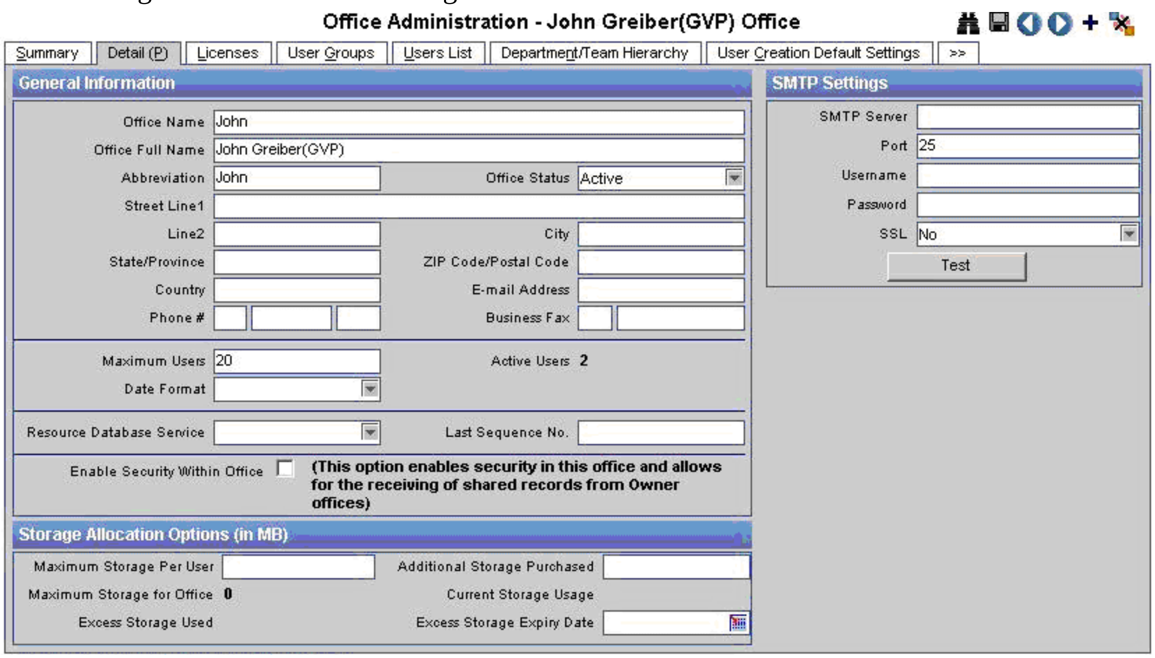
User Proxies are used to view and modify contact records for those that the user does not have a direct assignment to. The User Proxy relationship is between users.

For example, in one office, there are two users where office security is enabled. The users are User A and User B. If User A is assigned to Contact A, and User B only proxies for User B, then, User B will not be able to see Contact A. The two ways in which access can be established for User B to see Contact A is to either proxy User B to User A to see Contact A, or to assign User B to Contact A.

Office Setup

Office Detail

1. With the Users/Licenses Administrator role, select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office hyperlink to open the Detail tab.
3. For the Office Name and User Name fields, the following restrictions are to be followed:
   - Only alphanumeric characters or '_' can be used.
   - The length should be within a range of 2 to 20 characters.

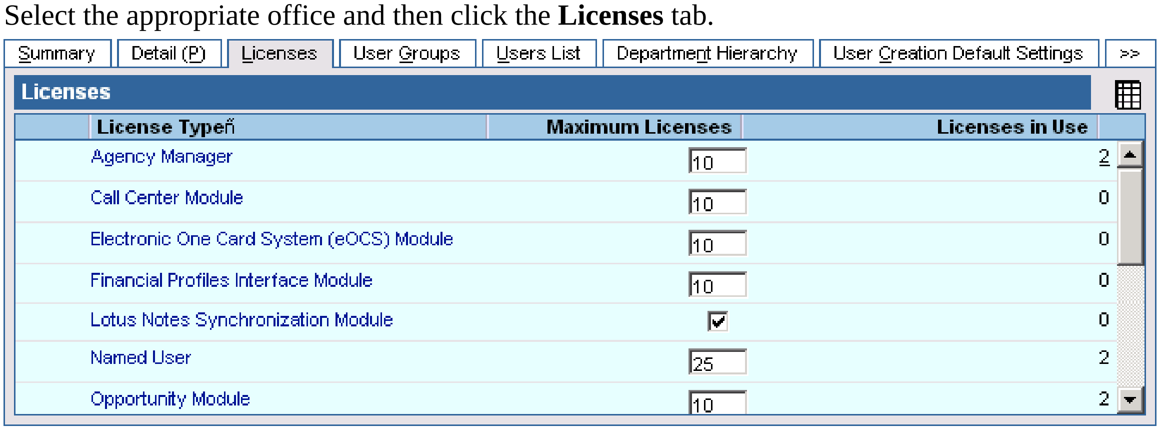


General Information	
Office Name	The Office Name field is read-only for the local office administrator and is editable only by a system office administrator
Office Full Name	Full name of the Office
Abbreviation	Office Name Abbreviation
Office Status	Indicates whether the office is active, disabled or read-only
Street Line1	Street Address
Line2	A second line for the Street Address, if necessary
City	City
State/Province	State or Province where the office resides
ZIP Code/Postal Code	The Postal code for the address in which the office is residing
Country	Country where the office resides
Phone #	Office phone number
Business Fax	Office fax number
E-mail Address	E-mail address information
Allow Impersonate	This option is for the administrator of the office to change. It

	is not modifiable from other offices. When selected, this will enable the parent office to impersonate into this office if the office hierarchy is established between this office and another office. By default, this is turned Off. For details on the difference between impersonate and non-impersonate, please refer to the *Office Hierarchy User Guide*
Maximum Users	Indicates the number of named users purchased
Active Users	Indicates the number of named users who are active within the office
Date Format	Default date format for the office. This format can be overridden by the user's preferences
Resource Database Service	This is used for the DataXchange Service where home office information can be updated automatically. This includes products, product-availability, guideline requirements, forms, etc.
Last Sequence No.	This read-only column is internally used by SmartOffice for the DataXchange Service
Enable Security Within Office	Enables office security, allowing record sharing based on assignment, proxy and groups
Storage Allocation Options (in MB)* **-** For SmartOffice Online. If the administrator is not from OfficeID=1, these fields are for informational purposes only	
Maximum Storage per User	Indicates the maximum allowed disk space per user
Additional Storage Purchased	Indicates the storage purchased in addition to what has been allocated
Maximum Storage for Office	Indicates the product of the Maximum Storage per User and Maximum User fields
Current Storage Usage	Indicates the current disk usage
Excess Storage Used	Indicates the excess disk usage
Excess Storage Expiry Date	Indicates the date in which the office will become read-only

Office Licenses

1. Select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **Licenses** tab.



The administrator can freely distribute the available licenses up to the maximum number of users indicated on the Detail tab.

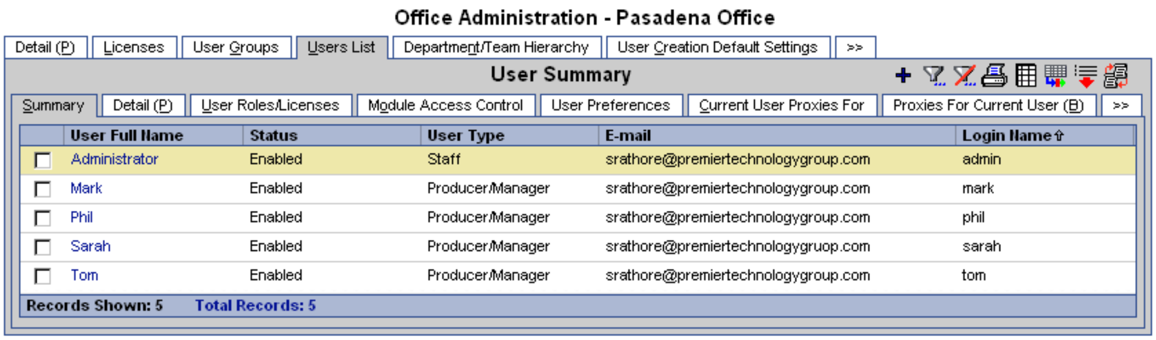
User Groups

1. Select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **User Groups** tab.

User Groups are used to group office users so that everyone in the group can view the contact record by assigning a group to that record. When office security is enabled, this group can be used to simplify the assignment of contacts to multiple users.

User List

1. Select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **Users List** tab.

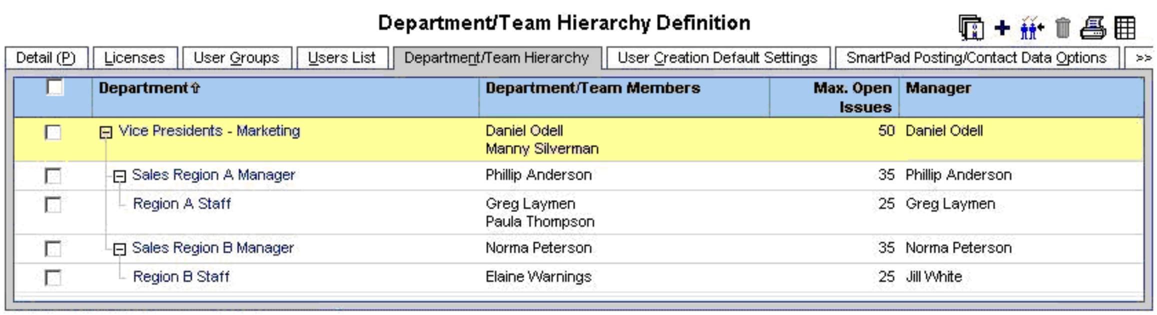


User Full Name	Status	User Type	E-mail	Login Name
Administrator	Enabled	Staff	srathore@premiertechnologygroup.com	admin
Mark	Enabled	Producer/Manager	srathore@premiertechnologygroup.com	mark
Phil	Enabled	Producer/Manager	srathore@premiertechnologygroup.com	phil
Sarah	Enabled	Producer/Manager	srathore@premiertechnologygruop.com	sarah
Tom	Enabled	Producer/Manager	srathore@premiertechnologygroup.com	tom

The office administrator can create users up to the maximum number of active users. Users can be enabled and disabled at any time to release the user license for distribution to another. Refer to the *User Setup* section for further information on the User List tabs.

Department Hierarchy

1. Select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **Department Hierarchy** tab.

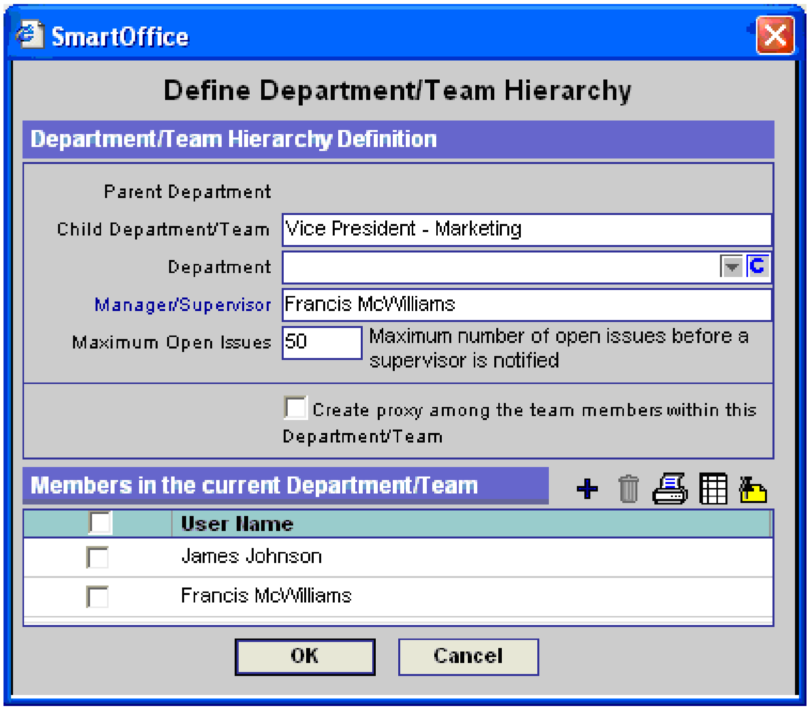


Department	Department/Team Members	Max. Open Issues	Manager
Vice Presidents - Marketing	Daniel Odell Manny Silverman	50	Daniel Odell
Sales Region A Manager	Phillip Anderson	35	Phillip Anderson
Region A Staff	Greg Laymen Paula Thompson	25	Greg Laymen
Sales Region B Manager	Norma Peterson	35	Norma Peterson
Region B Staff	Elaine Warnings	25	Jill White

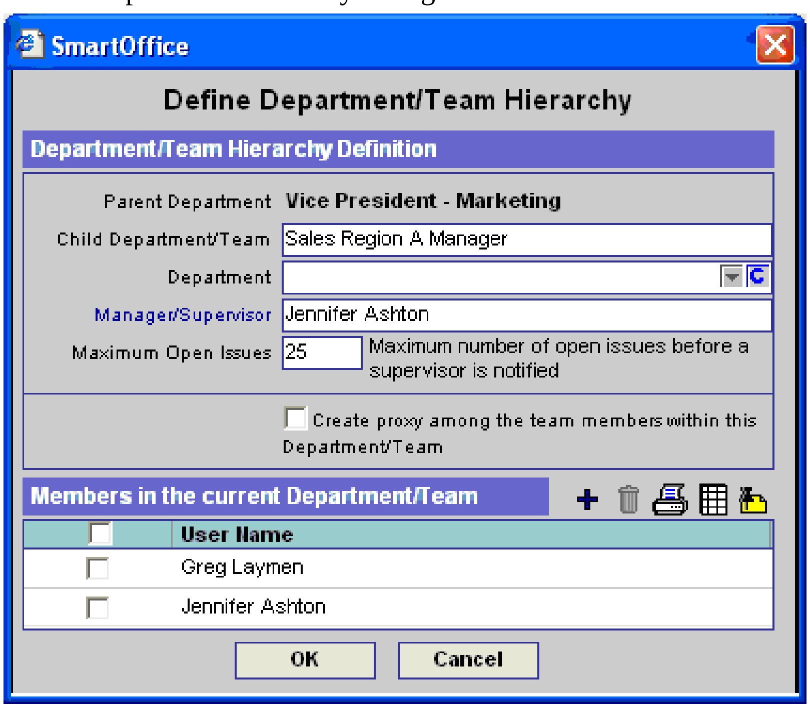
The Department Hierarchy tab is used to structurally organize and define user proxy relationships.

Define the Department Hierarchy

1. From the Department Hierarchy tab, click the **Add New Root Department** button to open the Define Department Hierarchy dialog box.



2. Enter the Child Department name and then select the **Create Proxy Among Users in this Department** option to create user proxy between the users listed.
3. Specify the users within the current department and then click the **OK** button.
4. Click the **Add New Department below the Current Department** button to reopen the Define Department Hierarchy dialog box.



5. Enter the Child Department name and then select the **Create Proxy Among Users in this Department** option to create a proxy between the listed users.
6. The Department and Manager/Supervisor fields are linked to workflows of the SmartService module. A member of the Department/Team can be made the manager by clicking on the Manager/Supervisor hyperlink.
7. Specify the users within the current department and then click the **OK** button.

As shown in the above figures, a proxy is established between Daniel Odell and Manny Silverman based on the department established for Vice Presidents. By establishing the departments beneath Vice Presidents, Daniel Odell and Manny Silverman both proxy for Phillip Anderson, Norma Peterson, Greg Laymen, Paula Thompson, and Elaine Warnings.

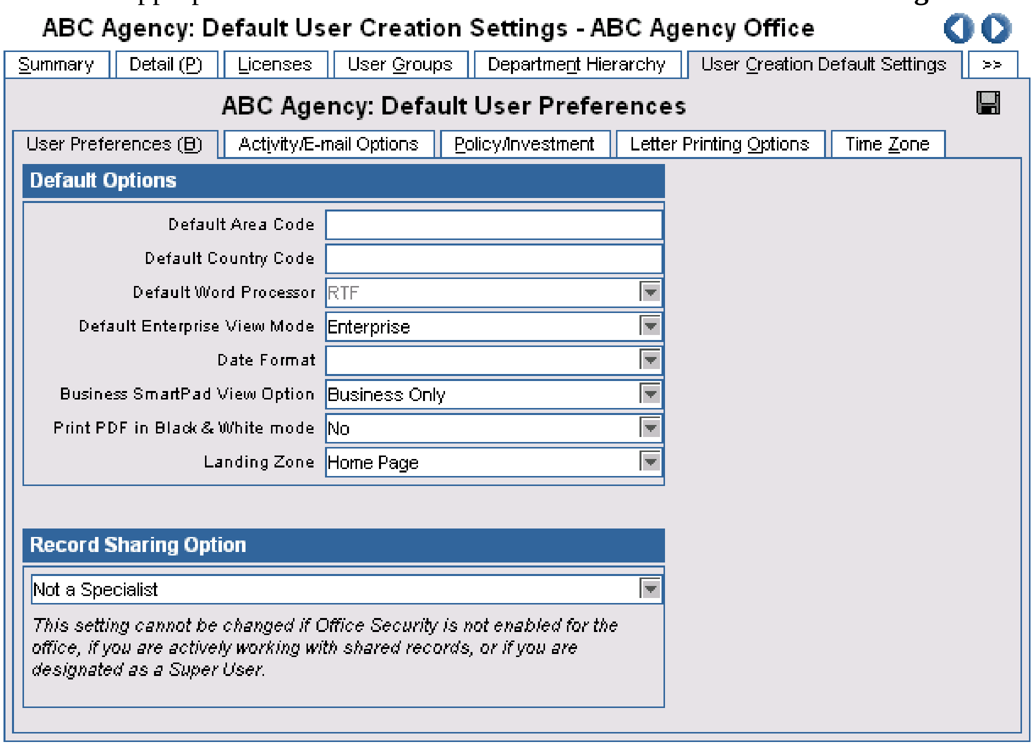
Likewise, Phillip Anderson proxies for Greg Laymen and Paula Thompson and Norma Peterson proxies for Elaine Warnings. The proxy is also established between Greg and Paula.

User Creation Default Settings

The User Creation Default Settings section is used to define the settings applied to newly created users. When the new user logs into the office, the preferences can be modified as necessary.

User Preferences

1. Select **Office Settings** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **User Creation Default Settings** tab.

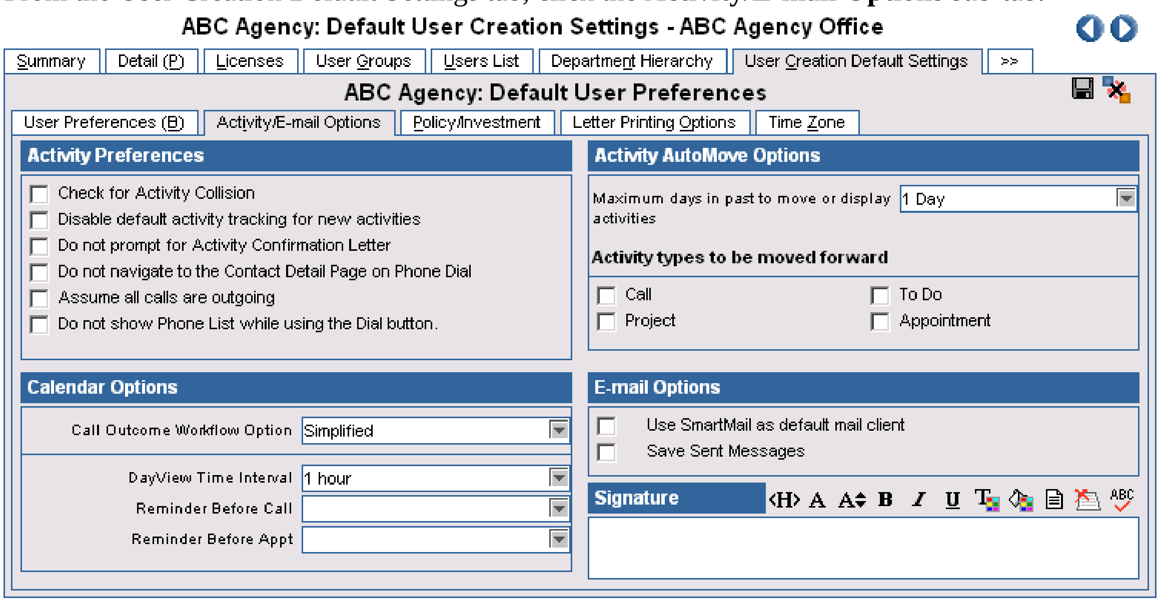


Default Options	
Default Area Code	The area code that will be populated when adding a new telephone number
Default Country Code	The country code that will be populated when adding a new telephone number
Default Word Processor	The document type used for letters, labels and envelopes

Date Format	The date format used while the user is logged in. If left empty, the office date format will be used
Business SmartPad View Options	The view option for displaying the Business SmartPad. The selections only include business Key Relations and Primary Contacts
Print PDF in Black & While mode	Select the appropriate default PDF printing option for color or black & white printing
Landing Zone	The first page that displays after a successful login
Record Sharing Options	
Record Sharing Options	Enable this mode to enable another user to share their contacts from another office. **Note:** The Super User attribute for the user cannot be enabled when designated as a Specialist

Activity/E-mail Options

From the User Creation Default Settings tab, click the **Activity/E-mail Options** sub-tab.

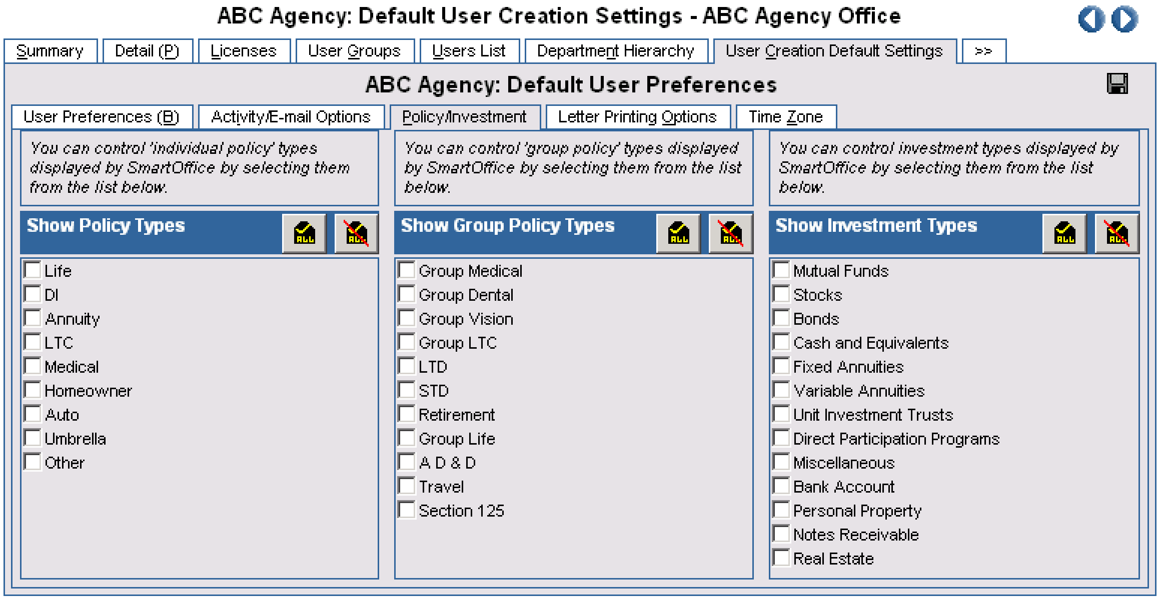


Activity Preferences	
Check for Activity Collision	Turns on the warning message for possible conflicting timed activities
Disable default activity tracking for new activities	Removes default selection of the Tracked option within the Activity Detail dialog box for all activity types except for Personal activities
Do not prompt for Activity Confirmation Letter	Removes the confirmation dialog box for scheduling future timed appointment and call type activities
Do not navigate to the Contact Detail Page on Phone Dial	Disables automatic navigation to the Contact Detail tab when the Call Type Activity and Phone Dial button are selected
Assume all calls are outgoing	Assumes that all calls are outgoing in the Activity Outcome dialog box

Do not show Phone List while using the Dial button	Disables the display of the Phone List while using the Dial button
Calendar Options	
Call Outcome Workflow Option	Select between the Simplified and Comprehensive Call Outcome Wizard for tracked call activities
DayView Time Interval	Select the appropriate 1-hour, 30-minute, 15-minute or 10-minute interval. To display the most accurate Time Interval, select either the 10-minute or 15-minute option
Reminder Before Call	Turns on the reminder message to display for the timed call activity. Note that the settings can be set up to eight hours prior to the timed call activity within the same day. The user must be logged into the application to receive a reminder
Reminder Before Appt	Turns on the reminder message to display for the timed appointment activity. Note that the settings can be set up to eight hours prior to the timed appointment activity within the same day. The user must be logged into the application to receive a reminder
Activity AutoMove Options	
Maximum days in past to move or display activities	Specify 1-30, 60, 90 and 180 days in the past to move the selected types of active un-timed activities to the current day upon login. These settings also affect how many days in the past to display unfinished appointments
Call	Moves active un-timed Call activities to the current day
To Do	Moves active un-timed To Do activities to the current day
Project	Moves active un-timed Project activities to the current day
Appointment	Moves active un-timed Appointment activities to the current day
E-mail Options	
Use SmartMail as default e-mail client	Select this to use SmartMail as the default e-mail client while using SmartOffice
Save Sent Messages	Select this to save the sent messages
Signature	Enter the e-mail signature when using SmartMail

Policy/Investment

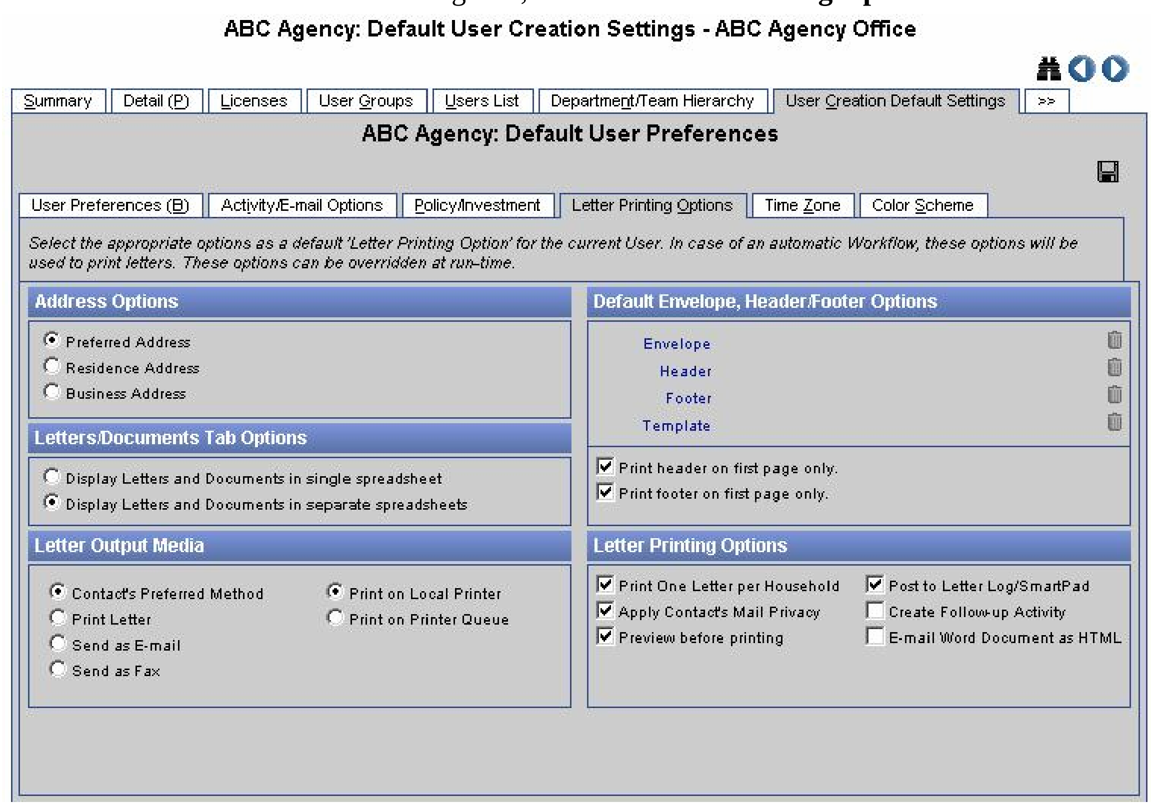
From the User Creation Default Settings tab, click the **Policy/Investment** sub-tab.



Select the Policy and/or Investment types to display by default. Please note that the Policy, Group Policy, and Investment types are only visible if the user is given the corresponding license.

Letter Printing Options

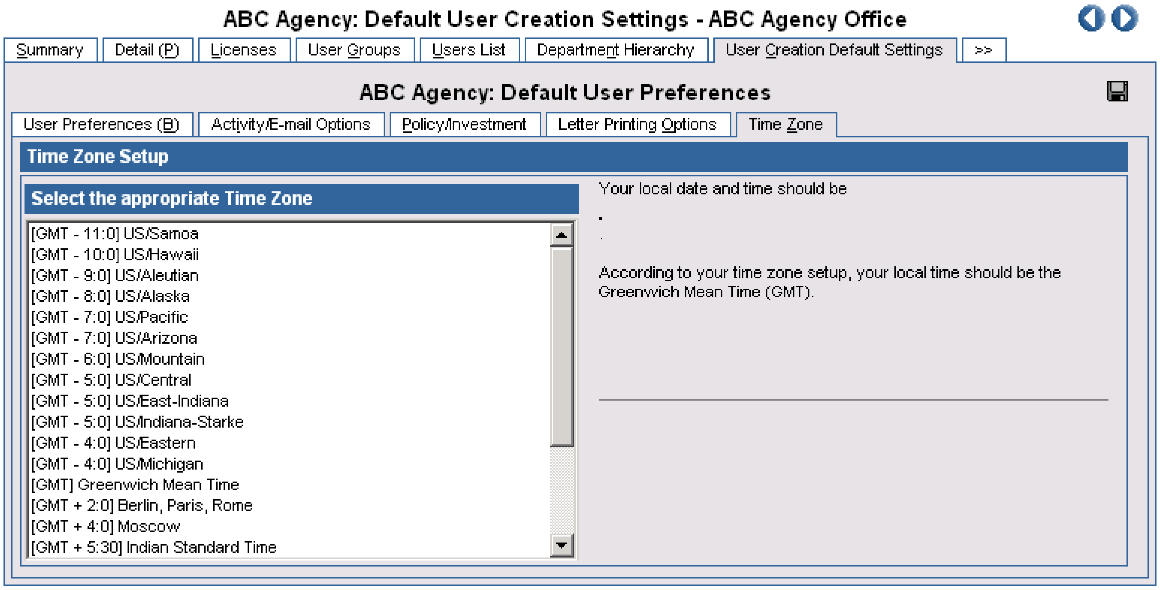
From the User Creation Default Settings tab, click the **Letter Printing Options** sub-tab.



Address Options	
Preferred Address Residence Address Business Address	Select one option. The selection is used to enter the address merge codes in letters, labels and envelopes
Display Letter and Documents in a single spreadsheet Display Letter and Documents in separate spreadsheets	Select one option. The selection is used to determine the display type within the Contact's Letters/Documents tab
Letter Output Media	
Contact's Preferred Method Print Letter Send as E-mail Send as Fax Print on Local Printer Print on Printer Queue	Select the Contact's Preferred Method for Printing, E-mailing or Faxing from the Contact Detail tab. The Contact's Preferred Method and the Print Letter selections prompt to either Print on a Local Printer or Print through the Printer Queue. Select Send as E-mail to send letters through e-mail. Note that additional e-mail privileges and settings must be enabled and configured to use this option. Select Send as Fax to send letters through facsimile. Note that additional privileges may be needed to send facsimiles
Default Envelope, Header/Footer Options	
Envelope Header Footer Template	Select the appropriate default document type within the Form Letter Document Summary
Print header on first page only Print footer on first page only	Select the applicable option to print headers and/or footers on the first page only
Letter Printing Options	
Print One Letter per Household	Select this option to print one letter per household
Post to Letter Log/SmartPad	Select this option to save the letter to the letter log upon printing/sending and post a note to the SmartPad
Apply Contact's Mail Privacy	Select this option to check the contact's mail privacy setting
Create Follow-up Activity	Select this option to create follow-up activities for those records being sent as letters. Note that user settings may override and prohibit the creation of follow-up activities
Preview before printing	Select this option to preview before printing
E-mail Word Document as HTML	Select this option to e-mail a word document as HTML

Time Zone

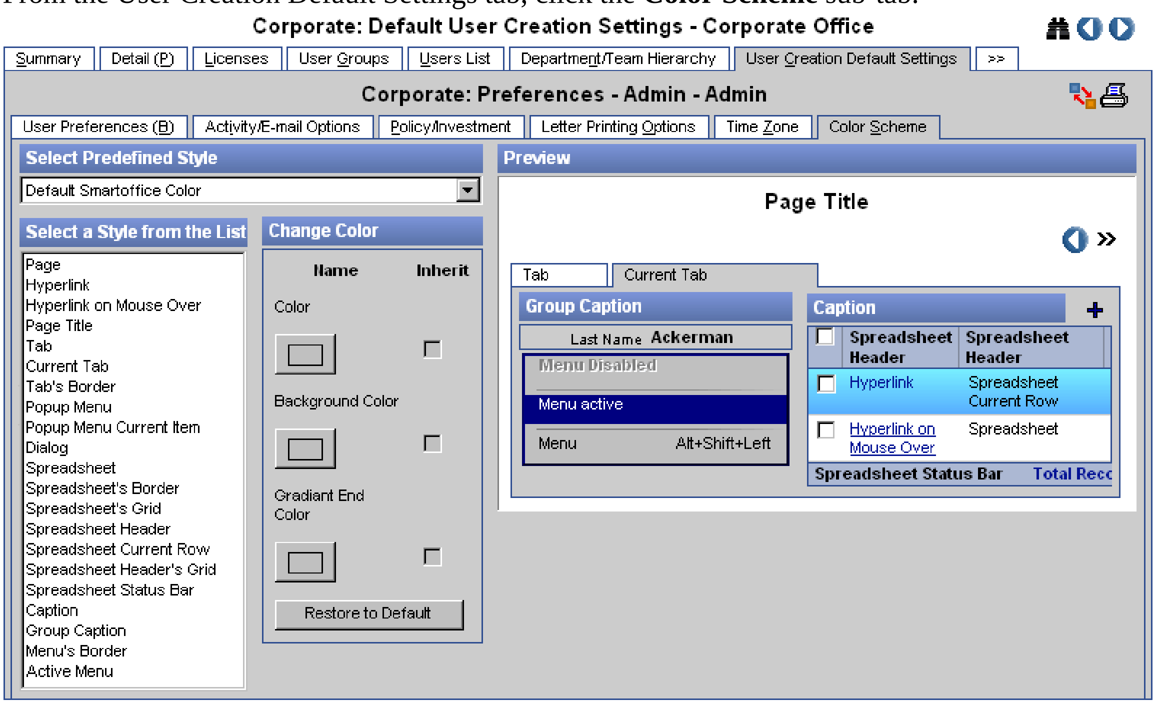
From the User Creation Default Settings tab, click the **Time Zone** sub-tab.



Select the appropriate Time Zone and then click the **Save** button.

Color Scheme

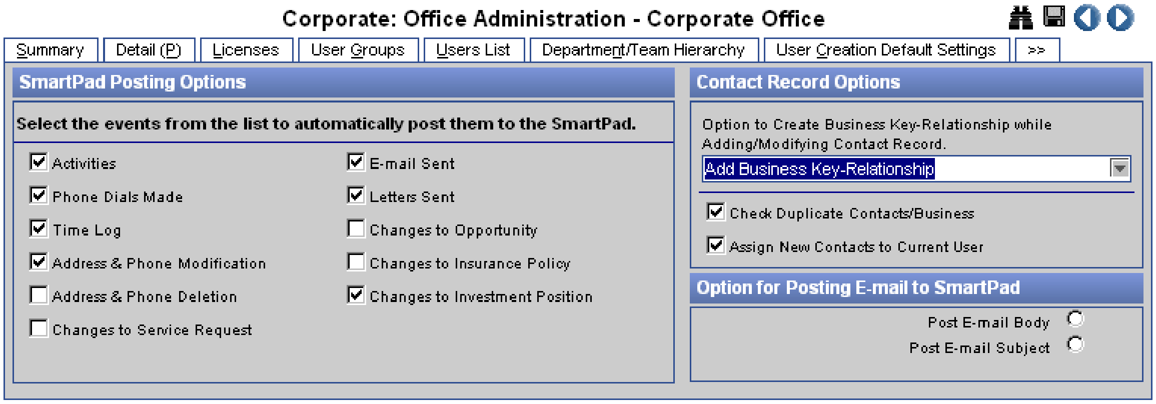
From the User Creation Default Settings tab, click the **Color Scheme** sub-tab.



Specify the appropriate Style formats in which SmartOffice will be shown for the newly created users. Options are available to personalize the views of Individual tabs, Hyperlinks and Menus etc.

SmartPad Posting/Contact Data Options

From the User Creation Default Settings tab, click the **SmartPad Posting/Contact Data Options** tab.



SmartPad Posting Options	
Activities E-mail Sent Phone Dial Made Letter Sent Time Log Change to Opportunity Address & Phone Modification Change to Insurance Policy Address & Phone Deletion Change to Investment Position	Select any of these options to post to the contact record's SmartPad based on activity creation, e-mail sent, phone dial made, letter sent, time log, address & phone modification, and address & phone deletion. Note that changes to Opportunities, Insurance Policies, and Investment Positions will only apply to those users with the respective licenses
Contact Record Options	
Option to Create Business Key-Relationship while Adding/Modifying a Contact Record.	Select the appropriate Add Business Key-Relationship, Ask Before Adding Business Key-Relationship, or Don't Add Business Key-Relationship option
Check Duplicate Contacts/Business	Checks for duplicate records during new record creation
Assign New Contacts to Current User	Automatically assigns new contacts to the current user. In order to choose from the available users in the office, do not select this option
Option for Posting E-mail to SmartPad	
Post E-mail Body Post E-mail Subject	Select the Post E-mail Body option to post only the body of the E-mail sent and the Post E-mail Subject option to post only the Subject of the E-mail sent

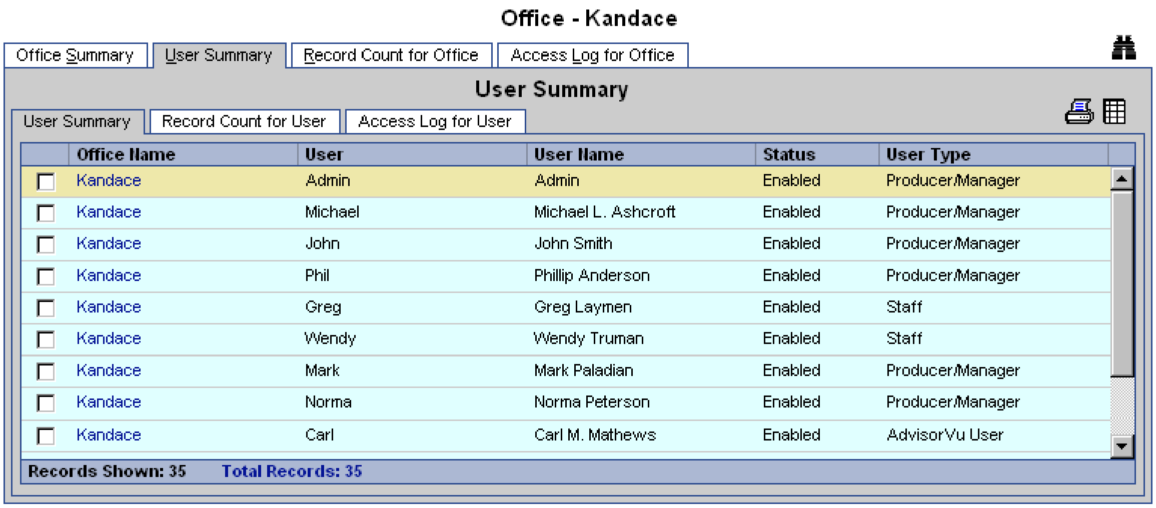
Global Proxy

From the User Creation Default Settings tab, click the **Global Proxy** tab to display the office's complete proxy list.

Usage Console

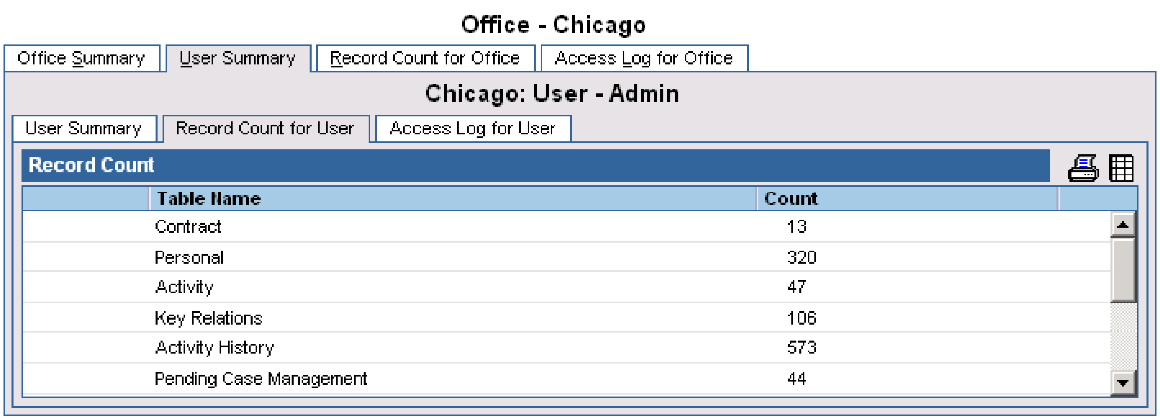
User Summary

1. With the Users/Licenses Administrator role, select **Usage Console** from the **Office Setup** expanded menu to display the Office Summary.
2. Select the appropriate office and then click the **User Summary** tab.



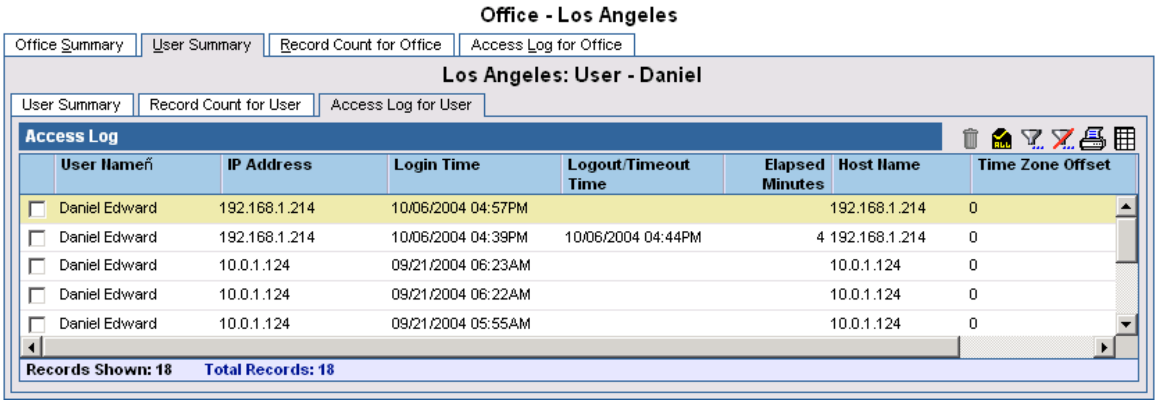
Record Count for User

From the User Summary tab, click the **Record Count for User** sub-tab.



Access Log for User

From the User Summary tab, click the **Access Log for User** sub-tab.



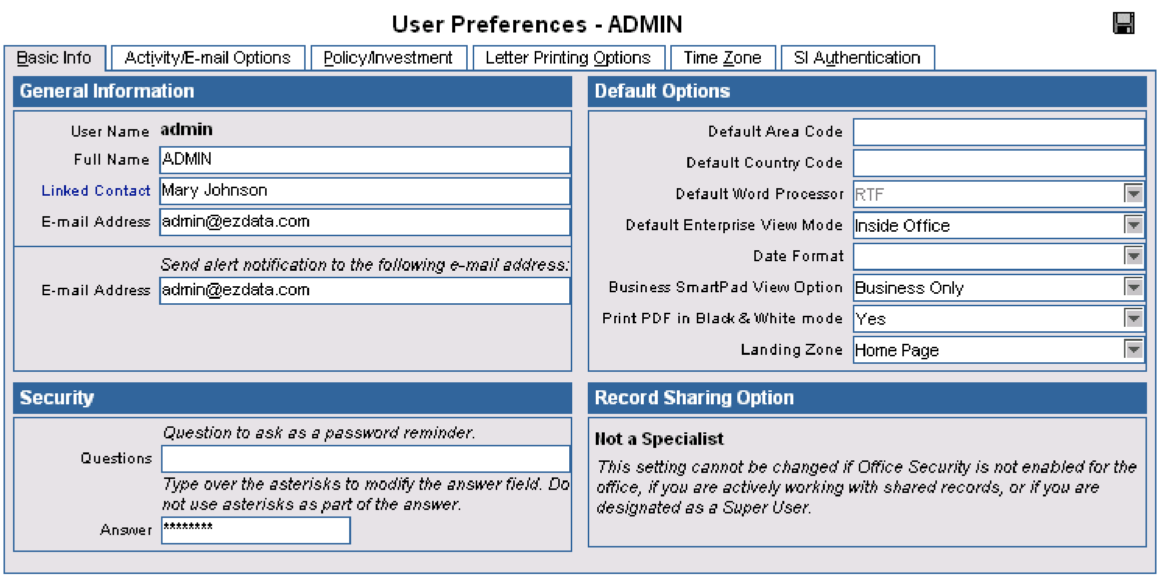
User Setup

The User Setup settings are based on both administrator defined settings and user preferences.

User Preferences

Basic Info

Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.

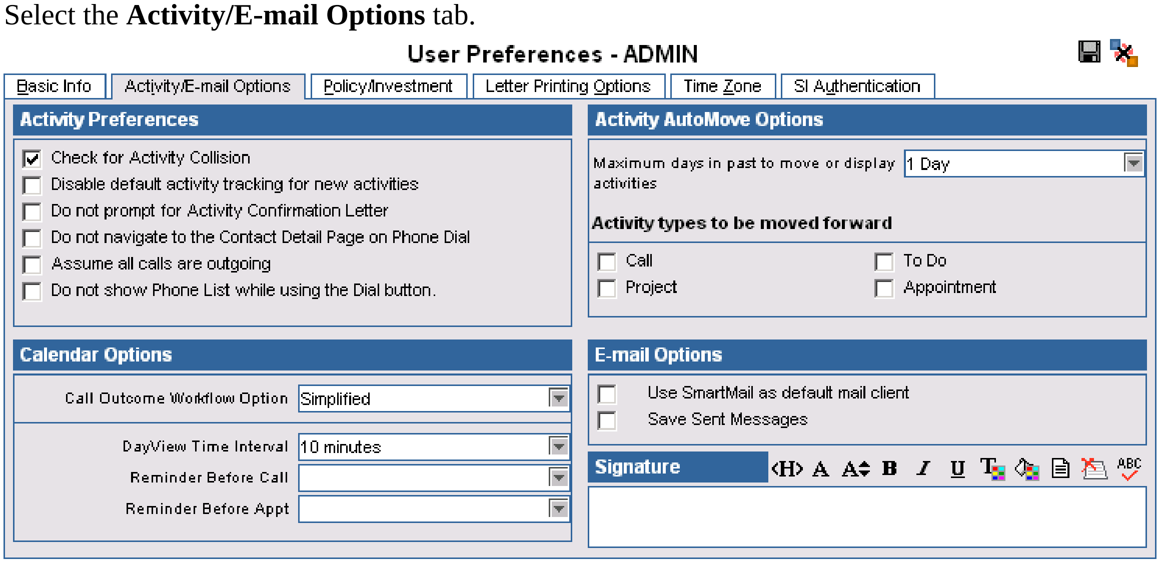


General Information	
User Name	The User Name given when the user was created
Full Name	The user's full name used to identify the User Name
Linked Contact	Select the Contact Individual's record to identify as the User Contact
E-mail Address (top)	Enter an e-mail address to receive important information such as a password in case the password is reset
E-mail Address (bottom)	Enter the e-mail address to receive alert notifications

Security	
Question	The question to ask as a password reminder
Answer	The answer entered is a response to the password question and must be matched in order to reset the password. Do not use an asterisk when typing the Answer
Default Options	
Default Area Code	The area code that will populate when adding a new telephone number
Default Country Code	The country code that will be populated when adding a new telephone number
Default Word Processor	The default word processor to use for letters, labels and envelopes
Date Format	The date format used while the user is logged in. If left empty, the office date format will be used
Business SmartPad View Options	The view option for displaying the Business SmartPad. The options are Business Only, Include Key Relations, Include Primary Contact, and Key Relations Only
Print PDF in Black & While mode	Select the **Yes** option to print the PDF in Black & White
Landing Zone	The first page that displays after a successful log in
Record Sharing Options	
Record Sharing Options	Enable this mode to allow another user to share a contact from another office. Note that the Super User attribute (set by the User Administrator) cannot be enabled to become a specialist

Activity/E-mail Options

1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Activity/E-mail Options** tab.



Note that depending on whether or not the user uses SmartMail, the E-mail Options and Signature sections may be read-only.

Activity Preferences	
Check for Activity Collision	Turns on the warning message for possible conflicting timed activities
Disable default activity tracking for new activities	Removes the default selection of the Tracked option within the Activity Detail dialog box for all activity types except for Personal activities
Do not prompt for Activity Confirmation Letter	Removes the confirmation dialog box for scheduling future timed appointment and call activities
Do not navigate to the Contact Detail Page on Phone Dial	Disables automatic navigation to the Contact Detail tab when the call type activity and Phone Dial button are selected
Assume all calls are outgoing	Assumes that all calls are outgoing in the Activity Outcome dialog box
Do not show Phone List while using the Dial button	Disables the display of the Phone List while using the Dial button
Calendar Options	
Call Outcome Workflow Option	Select between the Simplified and Comprehensive Call Outcome Wizard for tracked call activities
DayView Time Interval	Select the appropriate 1-hour, 30-minute, 15-minute or 10-minute interval. To display the most accurate Time Interval, select either the 10-minute or 15-minute option
Reminder Before Call	Turns on the reminder message to display for the timed call activity. **Note:** The settings can be set up to eight hours prior to the timed call activity within the same day. The user must be logged into the application to receive a reminder
Reminder Before Appointment	Turns on the reminder message to display for the timed appointment activity. **Note:** The settings can be set up to eight hours prior to the timed appointment activity within the same day. The user must be logged into the application to receive a reminder
Activity AutoMove Options	
Maximum days in past to move or display activities	Specify up to 30 days in the past to move the selected types of active un-timed activities to move to the current day upon login. These settings also affect how many days in the past to display unfinished appointments
Call	Moves active un-timed Call activities to the current day
To Do	Moves active un-timed To Do activities to the current day
Project	Moves active un-timed Project activities to the current day

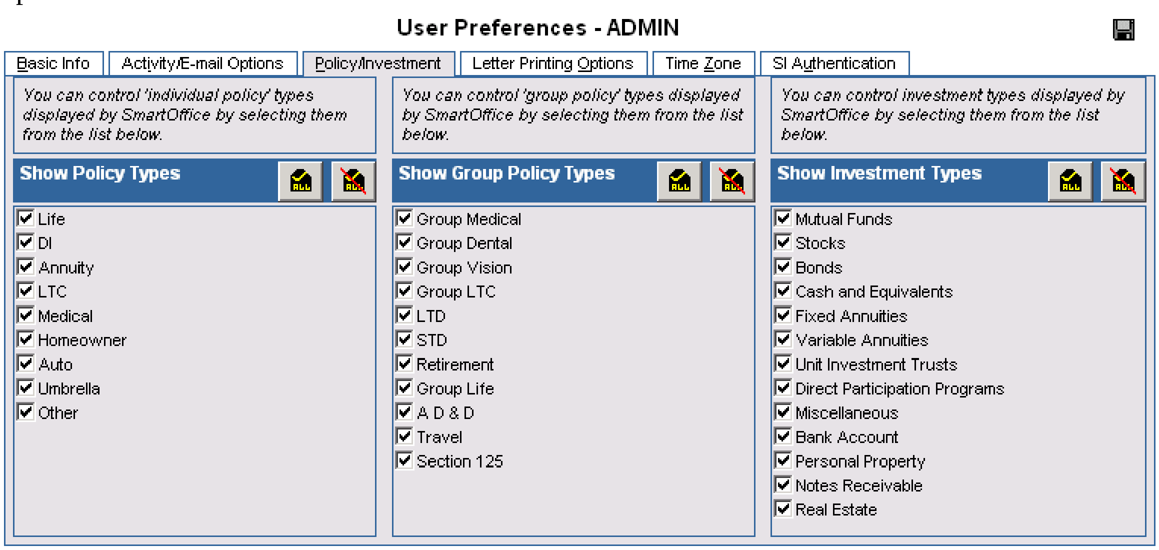
Appointment	Moves active un-timed Appointment activities to the current day
E-mail Options	
Use SmartMail as default mail client	Select this to use SmartMail as the default e-mail client while using SmartOffice
Save Sent Messages	Select this to save the sent messages
Signature	Enter the e-mail signature when using SmartMail

Policy/Investment

Please note that this tab will only display if the user has a Policy, Group Policy and/or Investment license.

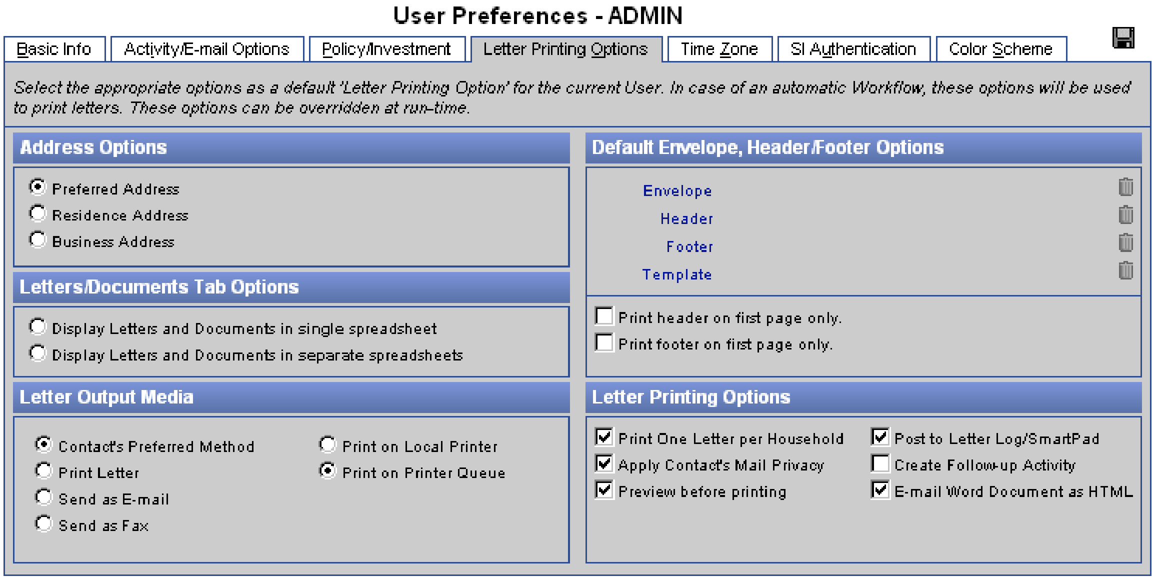
1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Policy/Investment** tab.

Specify the applicable types to display on the Policy, Group Policy and/or Investment spreadsheets.



Letter Printing Options

1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Letter Printing Options** tab.

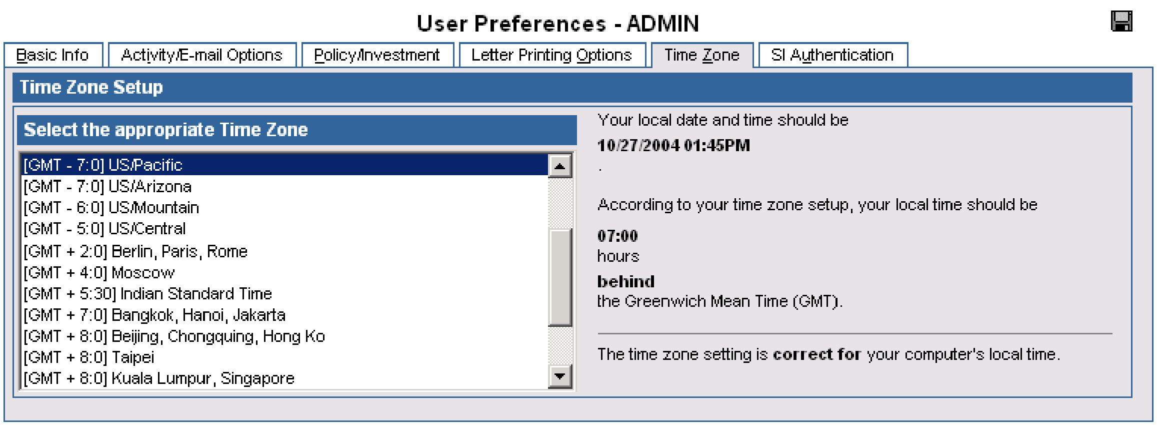


Address Options	
Preferred Address Residence Address Business Address	Select one option. The selection is used to enter the address merge codes in letters, labels and envelopes
Display Letter and Documents in a single spreadsheet Display Letter and Documents in separate spreadsheets	Select one option. The selection is used to determine the display type within the Contact's Letters/Documents tab
Letter Output Media	
Contact's Preferred Method Print Letter Send as E-mail Send as Fax Print on Local Printer Print on Printer Queue	Select the Contact's Preferred Method for Printing, E-mailing or Faxing from the Contact Detail tab. The Contact's Preferred Method and the Print Letter selections prompt to either Print on a Local Printer or Print through the Printer Queue. Select Send as E-mail to send letters through e-mail. Note that additional e-mail privileges and settings must be enabled and configured to use this option. Select Send as Fax to send letters through Facsimile. Note that additional privileges may be needed to send a facsimile
Default Envelope, Header/Footer Options	
Envelope Header Footer Template	Select the appropriate default document type within the Form Letter Document Summary
Print header on the first page only.	Select any of the options to print headers and/or

Print footer on the first page only.	footers on the first page only
Letter Printing Options	
Print One Letter per Household	Print one letter per household
Save the letter to the Letter Log	Save the letter to the letter log upon printing/sending
Apply Contact's Mail Privacy	Check the contact's mail privacy setting
Create Follow-up Activity	Create follow-up activities for those records being sent as letters. Note that user settings may override and prohibit the creation of follow-up activities
Preview before printing	Preview before printing
E-mail Word Document as Text	E-mail a word document as text

Time Zone

1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Time Zone** tab.



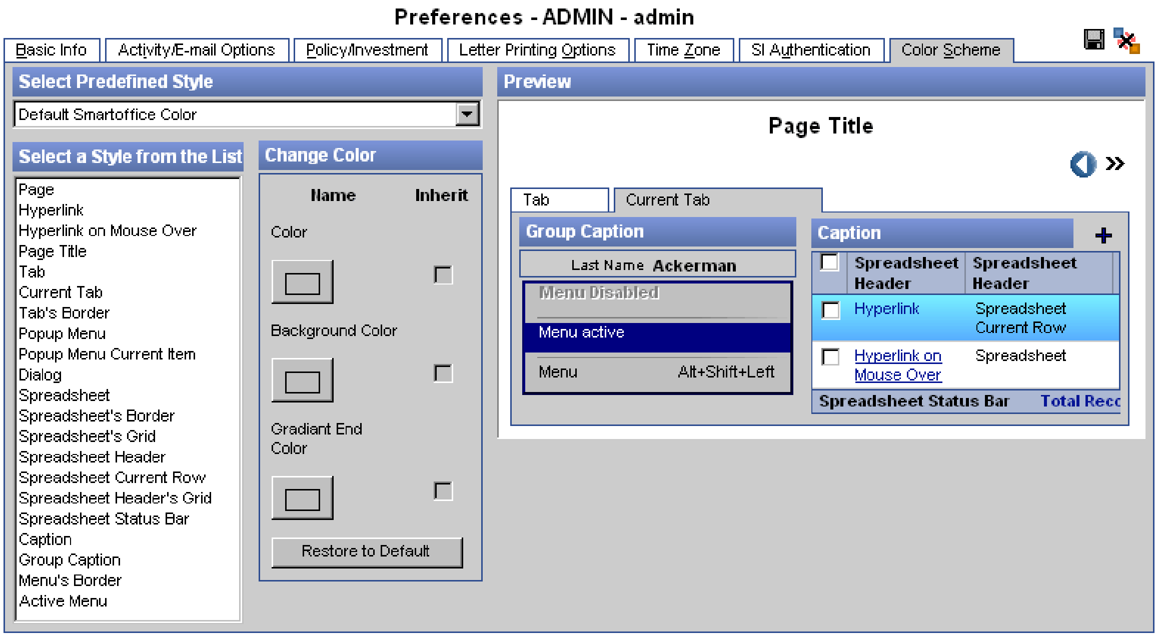
3. Select the appropriate Time Zone and then click the **Save** button.

SI Authentication

Please refer to the *SmartIntegrator* documentation.

Color Scheme

1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Color Scheme** tab.

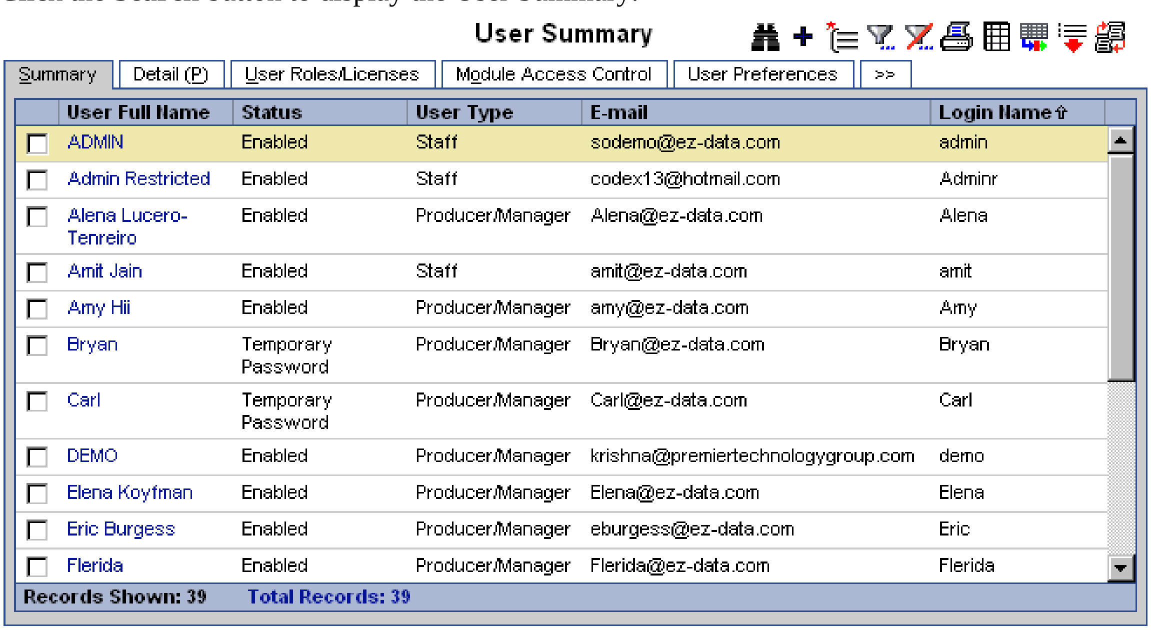


3. Specify the appropriate Color settings and then click the **Save** button.

User Management

Summary

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.



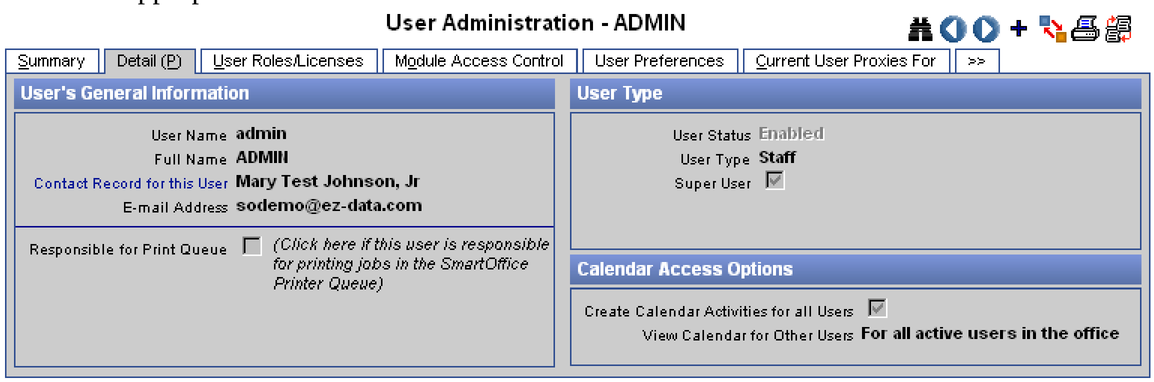
User Full Name	Status	User Type	E-mail	Login Name
ADMIN	Enabled	Staff	sodemo@ez-data.com	admin
Admin Restricted	Enabled	Staff	codex13@hotmail.com	Adminr
Alena Lucero-Tenreiro	Enabled	Producer/Manager	Alena@ez-data.com	Alena
Amit Jain	Enabled	Staff	amit@ez-data.com	amit
Amy Hii	Enabled	Producer/Manager	amy@ez-data.com	Amy
Bryan	Temporary Password	Producer/Manager	Bryan@ez-data.com	Bryan
Carl	Temporary Password	Producer/Manager	Carl@ez-data.com	Carl
DEMO	Enabled	Producer/Manager	krishna@premiertechnologygroup.com	demo
Elena Koyfman	Enabled	Producer/Manager	Elena@ez-data.com	Elena
Eric Burgess	Enabled	Producer/Manager	eburgess@ez-data.com	Eric
Flerida	Enabled	Producer/Manager	Flerida@ez-data.com	Flerida

3. The Current User Proxy For column on the Summary spreadsheet displays the list of users for whom he/she proxies. A Super User indicator is also available in the User Summary spreadsheet.

   The Summary is used to add users and access the Detail, User Roles/Licenses, Module Access Control, Current User Proxies For, Proxies for Current User, User Groups and Partial Hierarchy Definition tabs.

Detail

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **Detail** tab.

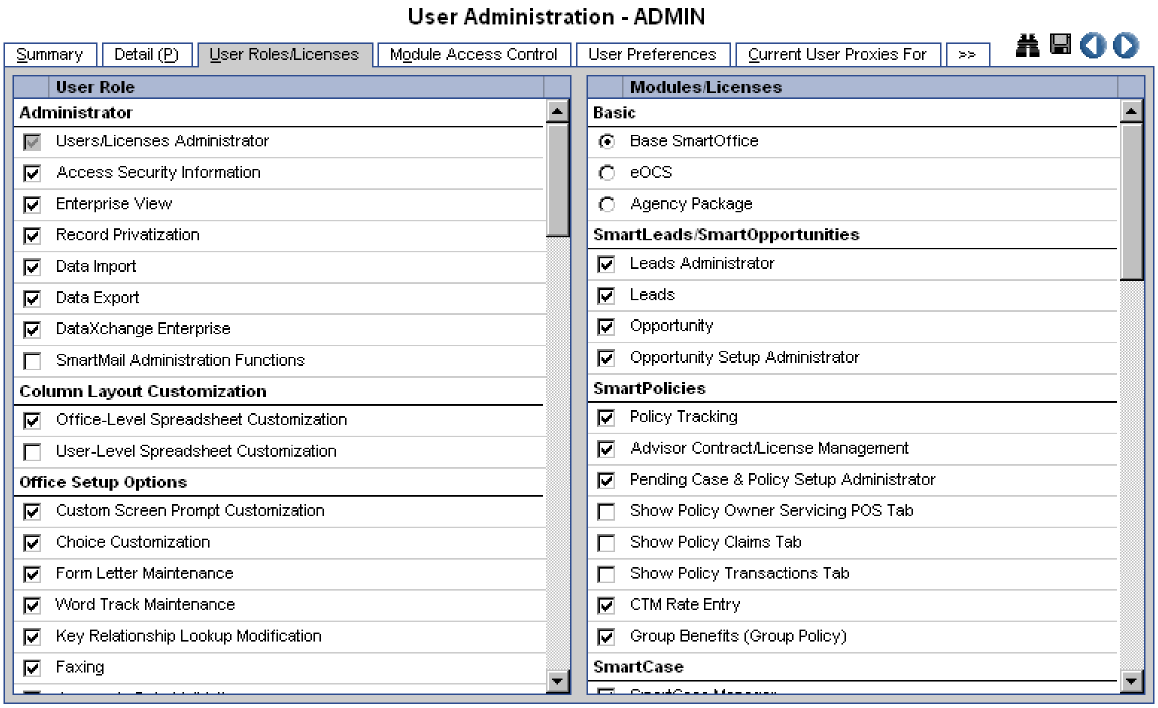


User's General Information	
User Name	The User Name given when the user was created. The User Name should be made up of 2 to 20 alphanumeric characters.
Full Name	The user's full name used to identify the User Name
Contact Record for the User	Select the Contact Individual's record to identify as the User Contact
E-mail Address	Enter an e-mail address to receive important information such as a password in case the password is reset
External Link	The field used for Single Sign-on
Responsible for Print Queue	Select this option if the user is responsible for printing
User Type	
User Status	Select either Active or Disabled. When the password is reset or if the user has never logged in, it will display a Temporary Password. Note that one cannot change their own status
User Type	This type is used internally to identify if the user is a Regular User, SmartView for Advisors User, or a Wholesaler
Super User	Select this option if the user is granted access to the contact records without adhering to the User Proxy and Contact Assignment rules. Note that this option

	cannot function with a record sharing user that is designated as a Specialist
Other Information	
Create Calendar Activities for all users	Enables the user to create activities for contact records that it does not proxy for and for those contact records that are within its proxy domain. When viewing the contact records outside of the proxy domain, the record detail will be limited to selected columns
View Calendar Activities for Other Offices	The five choices: 1. This function is not available – Enables access to the user calendar 2. For all active users in the proxy domain – Enables access to the active users' calendar within the proxy domain 3. For all users in the proxy domain – Enables access to all of the users' calendars within the proxy domain 4. For all active users in the office – Enables access to the active users' calendars. The view is limited to the calendar view. Note that the user will not be able to access the Activity Detail dialog box of those contact records that the user cannot see based on the proxy and assignment rules 5. For all users in the office – Enables access to all of the users' calendars in the office. The view is limited to the calendar view for those records the user cannot see. Note that the user will not be able to access the Activity Detail dialog box of those contact records that the user cannot see based on the proxy and assignment rules

User Roles/Licenses

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **User Roles/Licenses** tab.



The User Roles/Licenses settings also control the side menu and buttons on spreadsheets.

User Role	
Basic	
Base SmartOffice	This is the standard user role and enables access to the basic contact management features of SmartOffice. The access to modules and user rights are controlled by the other options on this tab
eOCS	Same as the Base SmartOffice user except that the default contact search and summary is the electronic version of the One Card System's Card File. Calendar and activity tracking are also different to accommodate the special needs of eOCS users. The eOCS user has access to special reports and other functions as found under the eOCS side menu
Agency Package	Enables access to SmartCaseManager, SmartAgency and the base system
Leads View	Enables access to some basic features of the Leads module such as Accepting Leads, Rejecting Leads, etc.

Leads - Coordinator View	Similar to the Leads View user role with more rights to access some basic features of Leads such as assignment of leads among advisors.
Administrator	
Users/Licenses Administrator	Enables license administration in addition to the functions listed for the Access Security Information role
Access Security Information	Enables modifications of Office Detail, Departmental Hierarchy, Partial Hierarchy, User Creation Default Settings, SmartPad Posting/Contact Data Options, Global Proxy, Group Management, User Roles, Module Access Control, Current User Proxy For, Proxies for Current User, Error Log and Deleted Contacts information. If a user in the System Office is given this role, Office Hierarchy modification is enabled
Enterprise View	For those organizations that have established an office hierarchy, this enables the user to view offices below the logged in office within that hierarchy
DataXchange Enterprise	Enables access to the DataXchange side menu in order to monitor and control processing as well as run reports and resolve processing errors for DataXchange Enterprise
Record Privatization	Enables the user to privatize records such as Filters, Dynamic Reports, Contact Records and Activities
SmartMail Administration Functions	Enables the SmartMail side menu
Data Export	Enables rights to export spreadsheet data using the Export Spreadsheet button located on various spreadsheets throughout SmartOffice. This also controls the ability to export Filters and Dynamic Reports
Data Import	Enables rights to import contact data into the system using the Data Import Wizard. This also controls the ability to import Filters and Dynamic Reports
Column Layout Customization	
System-Level Spreadsheet Customization	This enables the user to customize the spreadsheet layout for all users who have changed their default settings across offices.
Office-Level Spreadsheet Customization	This enables the user to customize the spreadsheet layout for the entire office.
User-Level Spreadsheet Customization	Enables the user to customize the spreadsheet layout for them.
Office Setup Options	
Custom Screen Prompt Customization	Enables the user to customize the field labels on

	custom tabs
Choice Customization	Enables the addition and modification of choice values
Form Letter Maintenance	Enables the ability to add, modify, and delete form letters, labels, envelopes and templates
Word Track Maintenance	Enables the ability to add, modify and delete Word Track scripts
Key Relationship Lookup Modification	Enables the user to modify key relationship lookups.
Faxing	Enables the ability to fax documents
Access to Data Validation	Enables access to the data validation functions
Personalization (Home Page Customization, Color Scheme)	Enables access to the Home Page customization features and color scheme customization features for spreadsheets, hyperlinks, etc.
Contact Assignments	Enables the user to assign contact records to users even if the user is not listed in the User Assignment list for the contact
Record Sharing Option	Enables the Record Sharing functionality
Job Queue Agent Maintenance	Enables the ability to add, modify and delete Job Agents
Created Jobs Maintenance	Enables the Created Jobs side menu
Marketing Campaign Management	Enables the Marketing Campaign side menu under Reporting/Marketing
Show Proposal Tracking Tab	Enables the Proposal Tracking tab on the Advisor Summary spreadsheet, Advisor Detail spreadsheet, etc.
Show Record Alert – Button	Enables the Record Alert button on the Detail tab for Individual Contact, Business Contact, Advisor, Agency and Candidate
Show Change Area Code – Side Menu	Enables the Area Code Change option under the Data Maintenance side menu
Reporting Options	
Dynamic Report Maintenance	Enables the user to add, modify and delete Dynamic Report definitions
Filter Maintenance	Enables the user to add, modify and delete Filters
Excel Template Maintenance	Enables the Excel Template side menu.
Group Reporting	Enables the user to select multiple users for reporting. Without this enabled, the user can only run reports for one user at a time
Run Crystal Reports	Enables the user to run already defined Crystal Reports
Run Dynamic Reports with Excel Templates	Enables the user to run the Dynamic Reports and manipulate data using Excel sheets
Crystal Report Administrator	Enables rights to add custom Crystal Reports and set up the custom settings for existing

	packaged Crystal Reports
Marketing Options – Button in spreadsheets	Enables the Marketing Options button on the Contact Summary and for contact-related Dynamic Reports.
Mass Operation	
Mass Deletion	Enables the user to delete more than one record at a time within a spreadsheet
Mass Modification	Enables the user to modify a selected column for more than one record at a time within a spreadsheet. This also includes the Area Code Changes feature
Mass Correspondence	Enables the right to send correspondence to more than one contact at a time. The Mass Correspondence button displays on applicable spreadsheets and is used to send up to 100 pieces of correspondence simultaneously. To send over 100 pieces of correspondence, select the **Mass Correspondence** option on the **Reporting/Marketing** expanded menu
Mass Activity Creation	Enables the creation of more than one activity from a spreadsheet
Mass Assignments	Enables the user to change the assignment for contact, activity, primary advisor and opportunity records
E-mail Interface	
SmartMail for Outlook	Enables SmartMail for Outlook. This role cannot be enabled in combination with SmartMail for Lotus Notes
SmartMail for Lotus Notes	Enables SmartMail for Lotus Notes. This role cannot be enabled in combination with SmartMail for Outlook
Contact/Calendar Synchronization	
SmartLink for Outlook	Enables SmartLink synchronization for Microsoft Outlook
SmartLink for Lotus Notes	Enables SmartLink synchronization for Lotus Notes
Advanced Contact Management Features	
SmartView for Clients - Buttons	Enables the SmartView for Clients button and Manage SmartView for Clients button on the Individual Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Convert Contact Type - Button	Enables the Convert Contact Type button on the Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Contact Copy - Button	Enables the Convert Contact Type button on the Contact Summary spreadsheet, Contact Detail

	spreadsheet, etc.
Show Business Hierarchy - Button	Enables the Show Business Hierarchy - Button on the Business Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Household-Key Relations Sync - Button	Enables the Household Key Relation Sync - Button on the Individual Contact – Key Relation spreadsheet
Contact Merge - Button	Enables the Contact Merge - Button on the Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Activity Outcome - Button	Enables the Activity Outcome - Button on the Contact Summary spreadsheet, Recruitment summary spreadsheet, etc.
Find Contacts with Matching Profile - Button	Enables the Find Contacts with Matching Profile - Button on the Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Customer Value - Button	Enables the Customer Value - Button on the Contact Summary spreadsheet, Contact Detail spreadsheet, etc.
Duplicate Contact Report - Side menu	Enables the Duplicate Contact Report - Side menu
Scanner Interface – Button	Enables the SmartScanner button on the Document Summary spreadsheet under the Letters/Documents tab.
Advanced Calendar Functions	
Day List – Side Menu	Enables the DayList side menu of the Calendar
Overdue Projects- Side Menu	Enables the Overdue Projects side menu of the Calendar
Unfinished Appointments – Side Menu	Enables the Unfinished Appointments side menu of the Calendar
Important Dates Posting – Side Menu	Enables the Important Dates Posting side menu of the Calendar
Calendar Reports - Side Menu	Enables the Calendar Reports side menu of the Calendar
Activity Statistics Report – Side Menu	Enables the Activity Statistics side menu of the Calendar
Search Activity – Side Menu	Enables the Activity Search side menu of the Calendar
Advanced Advisor Management Features	
Broker Dealer – Button	Enables the Broker/Dealer Button on the Advisor Detail spreadsheet.
Advisor/Contract Hierarchy – Buttons	Enables the Advisor/Contract Hierarchy Button on the Advisor Summary spreadsheet.
Product Marketing – Button	Enables the Product Marketing – Button on the Advisor Detail page.
Advisor Policy Statistics - Button	Enables the Advisor Policy Statistics - Button

	on the Advisor Detail page.
Advisor Reassignment - Button	Enables the Advisor Reassignment – Button on the Advisor Summary
Advisor Merge - Button	Enables the Advisor Merge – Button on the Advisor Detail and Advisor Summary spreadsheets.
SmartView for Advisors - Buttons	Enables the SmartView for Advisors - Buttons on the Advisor Summary
Show Production Tab	Enables the Production tab in the Advisor module
Show Commission Tab to non-CTM users	Enables the Commission tab even to users without Licenses for SmartCommissions
Remove Functionality	
Remove Calendar Functionality	Removes the Calendar side menu
Remove Timer Functionality	Provides the ability to remove the timer button from the bottom toolbar. This does not remove the Timer Log functionality
Remove SmartPad Functionality	Prevents a user from viewing the SmartPad or adding new SmartPad notes
Remove Alert button	
Remove Advisor/Agency Subsystem Side Menu	Removes the Advisor/Agency side menu
Remove Household Functionality	Removes the Household side menu and the Household tab for contact records
Remove Letters/Documents Tab	Removes the Letters/Documents tab from all the records throughout SmartOffice
Remove Set Functionality	Removes the Sets drop-down from the Contact side menu and all options to add contacts to a Set
Remove Super Add Functionality	Removes the Super Add button from the Individual and Business Contact Summary/Detail pages
Remove Change Password – Side Menu	Removes the Change Password option from the User Setup side menu
Modules/Licenses	
SmartLeads/SmartOpportunities	
Leads Administrator	Enables rights to dispatch leads to child offices and to clean up leads data. This is only available from the System Office
Leads Coordinator	Enables rights to assign, reject and revoke leads as well as run statistic reports for advisors
Leads	Enables the Leads module rights for the advisor
Opportunity	Enables the Opportunity module
Opportunity Setup Administrator	Enables access to administrative setup information
SmartPolicies	

Policy Tracking	Enables the Policy Tracking module
Advisor Contract/License Management	Enables access to the Licensing, Errors & Omissions, Continuing Education, Contracting and Appointment sections of the Advisor module as well as the Setup section in order to manage this information
Pending Case & Policy Setup Administrator	Enables Office-level Setup. This includes the capability to modify the Master Requirement List, Setup Requirement Follow-up Days, Status Exclusion, Pending Case Workflow and SmartView for Advisor Privacy defaults. This also enables the Pending Case Setup sub-menu. The Setup menu enables access to the Master Setup List that includes the DataXchange Setup menu and Initial Requirement Load for System Office users. DataXchange Setup allows the creation of DataXchange Registration, GA IDs for GA ID Validation and Auto-Update Exceptions. Access to the HO Pending Case menu is enabled with DX Registration information
Show Policy Owner Servicing 'POS' Tab	Enables the Policy Owner Servicing 'POS' tab in the Policy subsystem
Show Policy Claims Tab	Enables the Policy Claims tab in the Policy subsystem
Show Policy Transactions Tab	Enables the Policy Transactions tab in the Policy subsystem
Production Dashboard	Enables the Production Dashboard option under the Reporting/Marketing side menu
CTM Rate Entry	Enables the Commission Rate Entry option under the Policy/PCM Setup side menu
Group Benefits (Group Policy)	Enables access to the Group Benefits module (Group Policy)
SmartCase	
SmartCase Manager	Enables the Pending Case side menu and various other options such as Follow-Up, Team, Doctor, Medical Facility, Service Provider, E-mail Case Status etc. The user can Add, Delete and Modify PCM records
SmartCase Viewer	Enables only the PCM Search side menu and the user will be restricted to only view the existing PCM records
SmartInvestments	
Investment Tracking	Enables access to the Investment Tracking module
Asset Allocation	Enables the Asset Allocation side menu and Asset Allocation tab in the Account Master section

Performance Calculations	Enables the Performance Validation option under the Investment side menu. Shows the Performance Calculation button in the Account Master Summary and enables the Performance tab in the Account Master Summary and Position Summary spreadsheets
Show Liability Screens	Enables the Liabilities option under the Investment side menu. Also enables the Liability tab in the Account Master and Position Summary spreadsheets
Show Link Accounts/Positions Side Menu	Enables the Link Account to Contact and Link Position to Account options under the Investment side menu.
Show Investment Transactions	Enables the Transactions tab in the Account Master Summary and Position Summary spreadsheets
Show Investment Position History	Enables the Investment Position tab in the Account Master Summary spreadsheet and Position History tab in the Position Summary spreadsheet
Mobile Solutions	
SmartOffice Mobile for PC Module	Enables SmartOffice Mobile for PC
SmartOffice Mobile for PDA Module	Enables SmartOffice Mobile for PDA
SmartWholesaler	
Wholesaler Setup Administrator	Enables the administrative setup functions for the Wholesaler module
Wholesaler	Enables the Wholesaler module
SmartFulfillment	
Show Fulfillment Option	Enables the Fulfillment tab in the Individual and Business Contact Summary spreadsheets
Fulfillment Administrator	Enables the Fulfillment Center side menu
SmartCommissions- Advanced	
CTM Administrator	Enables access to all functions of the commission tracking system. This license includes carrier postings of commission checks, validation of what was received, what was expected and all reporting functionality and special utilities that are used to Mass Modify commission records
CTM House View	Enables full viewing access to all levels of payment in the hierarchy chain
CTM Supervisor View	Similar to the description given for the CTM Advisor View, this enables access to commission records for the advisor and supervisor levels
CTM Advisor View	Not to be confused with the SmartView for Advisor product, this role restricts how much

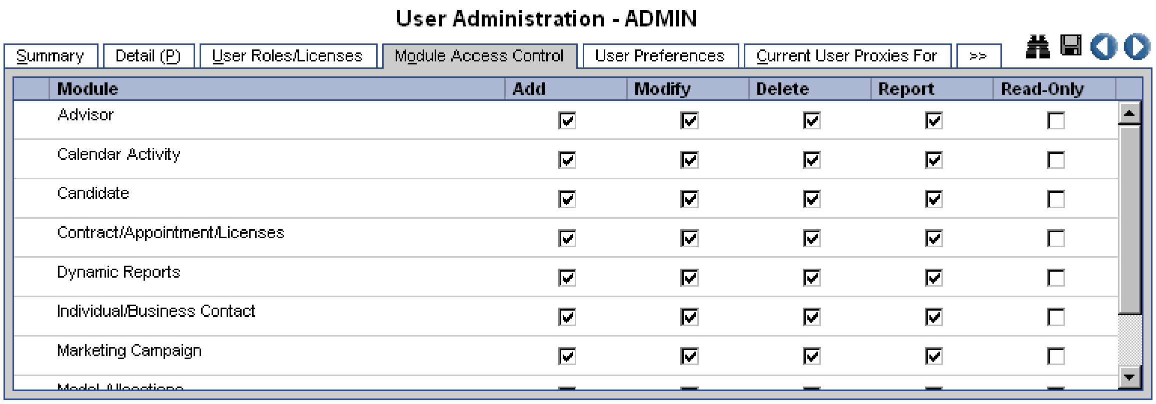
	commission data a person in the office can view over and above the access the user may already have to specific advisors within SmartOffice. CTM allows for a variety of levels of payment. The hierarchy begins at the advisor and rolls through all supervisors up to the house level. The CTM Advisor view enables only the viewing of commission records at the advisor level. Supervisor and house transactions will not be available for viewing
SmartCommissions – Base	
SmartCommissions – Carrier Interface	Enables access to contract setup and rate setup, and provides the ability to import commission data from insurance carriers for the purpose of reporting on the data only
SmartRecruiting	
Recruiter Setup Administrator	Adds everything that the Recruiter license adds and enables access to the Setup menu item
Recruiter	Adds the Recruitment Tracking side menu. This enables access to the Candidate/Recruit summary and detail information and the Recruiting Activity Management (RAM) Reports
SmartSeminars	
Seminar Tracking	Enables the Seminar Tracking module
SmartSurveys	
Survey Setup Administrator	Adds the Survey Setup side menu and enables the ability to create, administer and analyze published surveys
Survey User	Adds the Survey Setup Search menu item and enables the ability to link surveys to contact records
Table Extension Functionality	Enables the ability to link surveys to contact records using the Table Extension button
DataXchange Online Services	
Process HO Pending Case Status Information	Enables access to the HO Pending Case menu items
SmartLink for iPipeline	Enables the SmartLink for iPipeline option under the Policy/PCM Setup side menu
SmartWorkflow	
WFM Administrator	Enables the administrative functions of the WorkFlow Management module
WFM User (Read-only)	Enables read-only access to the WorkFlow Management module
Call Center	
Call Center Administrator	Enables the administrative functions of the Call

	Center
Call Center Supervisor	Enables the supervisory functions of the Call Center
Call Center User	Enables the Call Center functions
SmartService	
SmartService Setup Administrator	Enables administrative functions of the SmartService module by displaying the SmartService Setup side menu.
SmartService Manager	Enables the managerial functions of SmartService
SmartService User	Enables SmartService functions.
Integration	
DXO Adapter	Enables DXO Adapter integration
Financial Profiles+	Enables Financial Profiles+ integration
Google	Opens the Google search engine
Intellisys	Enables Intellisys integration
LaserApp	Enables LaserApp integration
Voice Mail Integration	Enables Voice Mail Integration functions
Albridge	Enables synchronization of accounts and positions with Albridge
PaperClip Interface	Enables PaperClip integration
LFG Policy Inquiry	Enables LFG Policy Inquiry integration
Pending Case Export	Enables Pending Case Export integration
SmartRule	
SmartRule Author	License to author SmartRule
SmartRule Subscriber	License to subscribe to SmartRule
SmartStart	
SmartStart Administrator	If the user is from the System office, the user may define roles and courses for SmartStart training
SmartService Manager	Enables the SmartService side menu and the Change Time button on the Service Request Detail tab
SmartService User	Enables the SmartService side menu

Please note that in order to make modifications on the Licenses column, the user must have the Users/Licenses Administrator user role. If the user has the Access Security Information user role, the Licenses column will be read-only.

Module Access Control

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **Module Access Control** tab.



The Module Access Control tab differs based upon the selections made in the User Roles/Licenses tab. Note that by altering the settings in this tab, it may make the user unable to properly use the application.

The application's relationship to each module is defined below:

Parent Module	Dependent Modules

Advisor	`AgentContract`
	`AgentRequirement`
	`Appointment`
	`BrokerDealer`
	`CECredits`
	`Education`
	`EO`
	`FollowUpReq`
	`LAEType`
	`License`
	`PolAgent`
	`ProdMarketing`
	`Reassginment`
	`Servicelogininfo`

Calendar Activity	`ActivityHistory`
	`Participant`
	`Recurrence`

Candidate	`Recruit Interview`
	`Recruit License Preparation`
	`Recruit Position`
	`Recruit Pre-Contract`
	`Recruit Requirement`
	`Recruit Stage`
	`RecruitIntv`
	`RecruitLicPrep`
	`RecruitPreCont`
	`RecruitReq`
	`RecruitStage`
	`RtGoal`

	RtPosStage
Contract/Appointment/Licenses	N/A
Dynamic Reports	N/A
Filters	N/A
Group Policy	Class GPHistory
Group Product	GPPlan GroupCategorySetup
Individual Policy	Claim cvVehicle DownloadSpreadSheetModule Driver MoneySubAcct NBHistory Polclient PolicyMaster PolicySubAcct PolTransaction Rating Rider Rrif Vehicle
Individual Product	Article Endorcement ProdRiskclass ProdSubAcct ProductFee ProductFeeComm RiderProduct
Individual/Business Contacts	Assignment ContactBus FCalcReport GrpCensus Household Illustration Keyrelation LastActive LetterContact MatchProfile PayWithdrawSchedule ProposalTracking Set SPIReqLog
Insurance Carrier	Forms FormState HODictionary NailbaCode VendorUnderGuideReqLink VenRiskclass
Investment Accounts/Positions	cvInvestContact cvLiability InvestAgent InvestContact PerfSelIndices PositionHistory Transaction

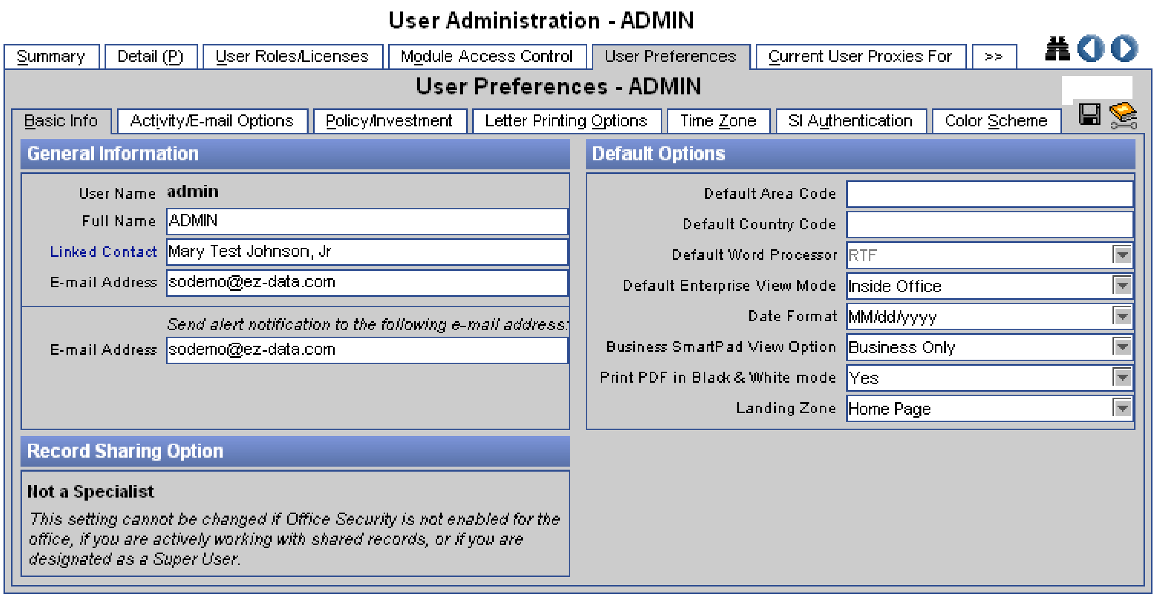
Leads	Campaign ContactOpportunity Demographic DistributionInfo fulfill Fulfillment LeadAssignHist LeadImport LeadsConsole Media ProcessLog qualification Rule Specialevent
Marketing Campaign	CampaignGuideline CmpgnParticipant
Model Allocations Definitions	N/A
Opportunity	AppuserRole Competition OpportunityKeyrel OpportunityStage OpportunityType OppStageAction OppStageActionDef OppStageHistory OppStageMap
Pending Case Management	Doctor ExclusionSubType extInterface HORep Hospital Imparements InitialPCMWF Insured MedFacility NBExchange NBTeam NBTrack PcmWorkFlow PlcyWarn policyStageStatus PolStatusExl ProductState Reinsurance Requirement StatusProcessed UnderGuide UnderWriter UndGuideReqLink VendorReq VendorUnderGuide VendorUnderGuideAge VendorUnderGuideFace VendorUnderGuideReq Venserviceprovider
Recruit	Recruit Interview Recruit License Preparation

	Recruit Position Recruit Pre-Contract Recruit Requirement Recruit Stage RecruitIntv RecruitLicPrep RecruitPreCont RecruitReq RecruitStage RtGoal RtPosStage
Security Master	PriceHistory QuoteService
Seminar	N/A
Service Request	N/A
SmartPad	N/A
Survey	N/A

User Management – User Preferences

An Administrator can set the User Preferences for other users. The Administrator can modify the following sections that are available under the **User Preferences** tab in the **User Management** section.

- Basic Info
- Activity/E-mail Options
- Policy/Investments
- Letter Printing Options
- Time Zone
- SI Authentication
- Color Scheme



Current User Proxies For

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **Current User Proxies For** tab.

The Current User Proxies For tab is a listing of all users the current user proxies for. Use this list to add or remove the users that you would like the current user to proxy for.

Proxies for Current User

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **Proxies for Current User** tab.

The Proxies for Current User tab is a listing of all other users that proxy for the current user. Use this list to add or remove any user that you would like to proxy for the current user.

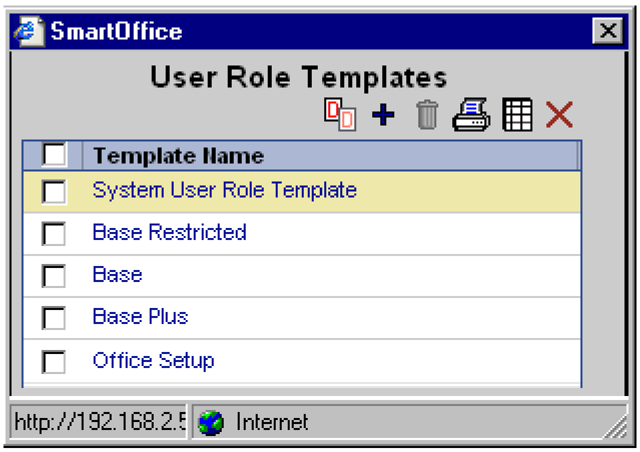
User Groups

1. With the Users/Licenses Administrator or Access Security Information role, select **User Management** from the **User Setup** expanded menu to display the User Search Options dialog box.
2. Click the **Search** button to display the User Summary.
3. Select the appropriate user and then click the **User Groups** tab.

User Groups are used to group users in the office so that everyone in the group can see a contact record by assigning a group to that record. When office security is enabled, this grouping of the users can be used to simplify the assignment of the contacts to multiple users.

User Role Templates

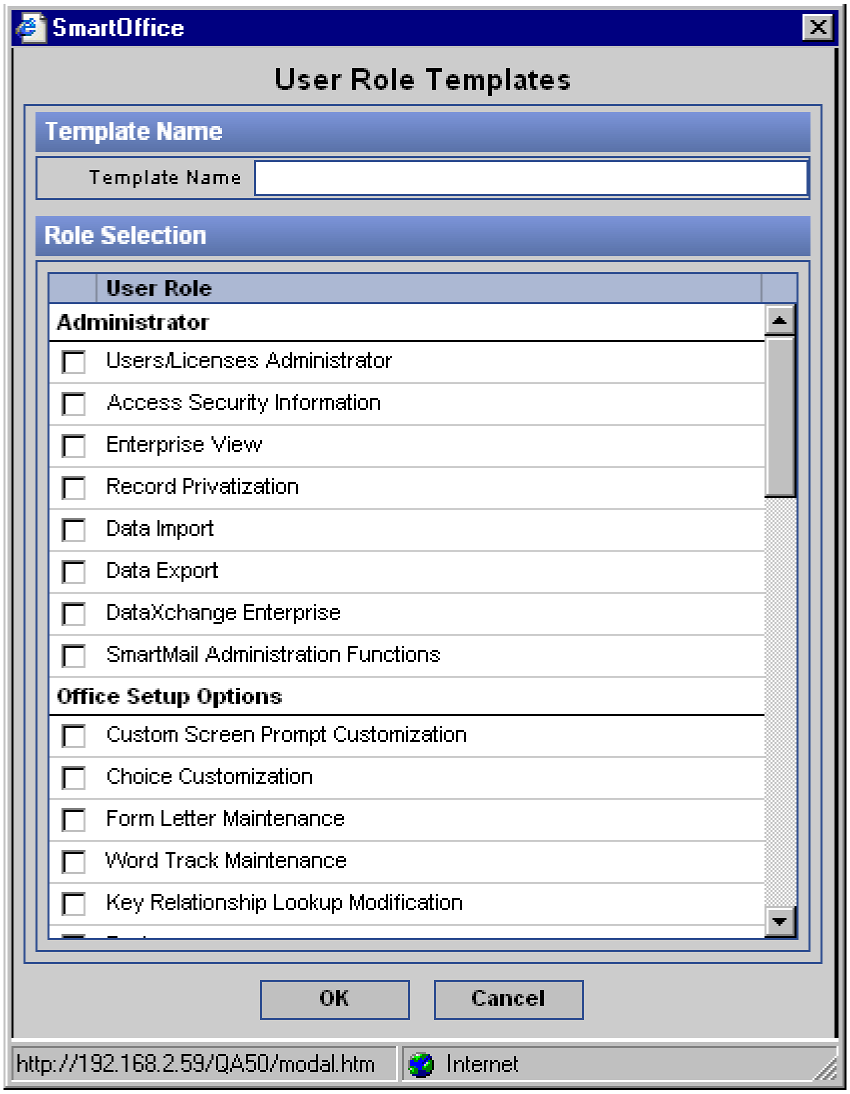
1. Select **User Role Templates** from the **User Setup** expanded menu to open the User Role Templates dialog box.



User Role Templates are used to maintain the templates applied to the users in the office. The User Role Template list displays the pre-defined templates from the parent offices as well as the System office.

The Users/Licenses Administrator or Access Security Information user role is required to manage User Role Templates. When creating a new template, the administrator can define a template name and specify the roles.

2. Click the **Add** button to display the second User Role Templates dialog box.



3. Enter the Template Name, specify the appropriate Role information and then click the **OK** button to save the new template.

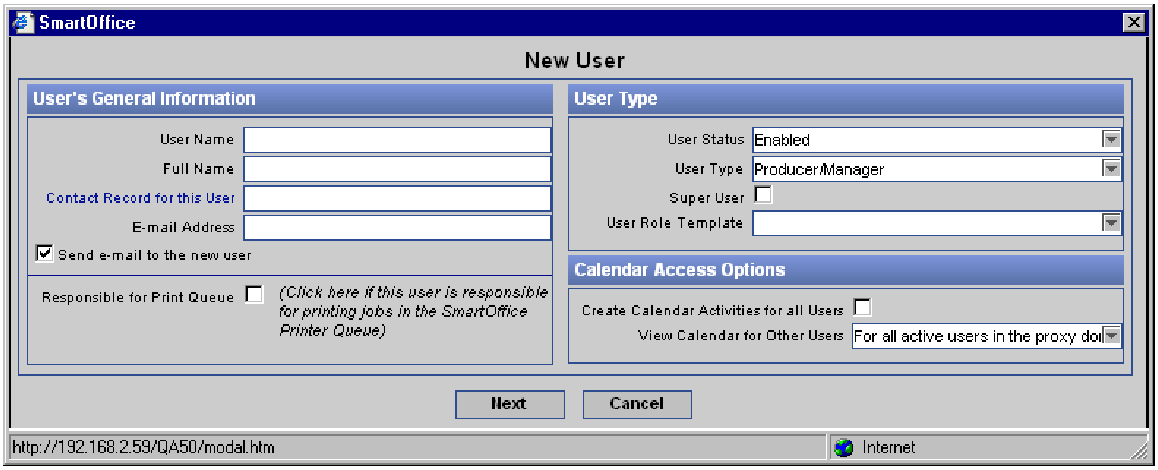
To apply a template

1. Select **User Summary** from the **User Management** expanded menu to open the User Search Options dialog box.
2. Click **Search** to display the User Summary.
3. Select a user and then click the **Apply User Role Template** button.

   Note that the administrator with access to only the access security information cannot create templates with the User Roles/License role and cannot apply any template to a user with that role; however, the other roles defined in the role template will be applied to the user. The administrator can overwrite the User Roles for any user at any time. If uncertain about what role was applied, reapply the role to the user.

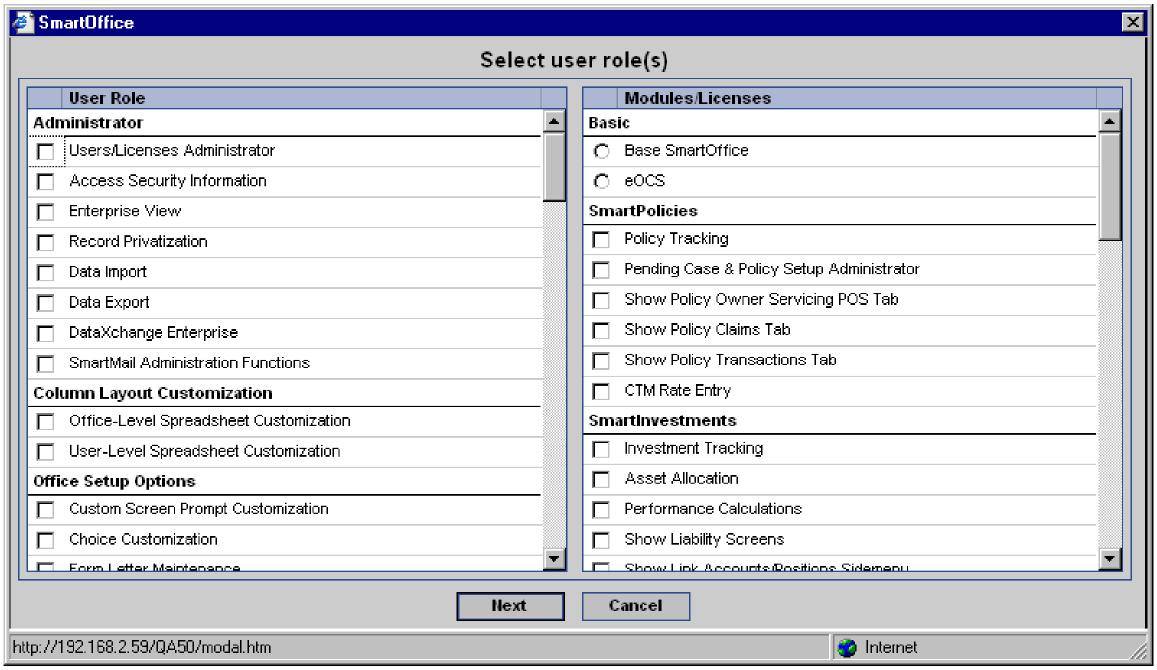
New User Creation

1. Select **User Management** from the **User Setup** expanded menu to display the User Setup Options dialog box.
2. Click the **Add** button to display the New User dialog box.



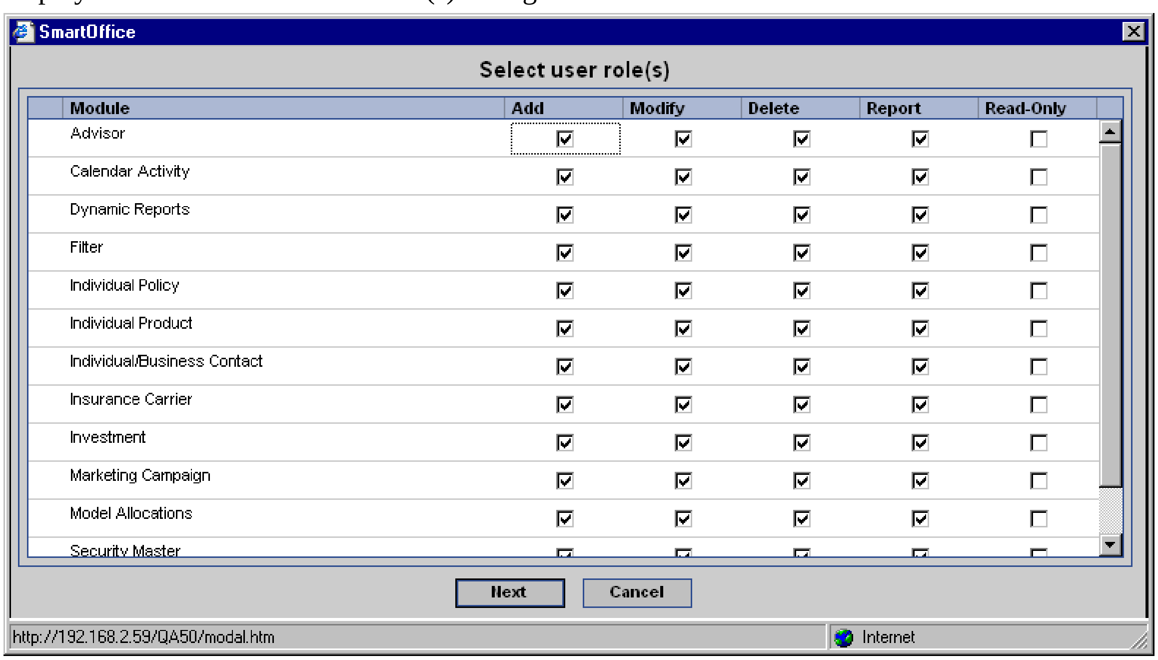
3. Enter a unique User Name.
4. Enter the Full Name.
5. The Contact Record for the User information is optional and can be specified at a later time.
6. Enter the E-mail Address for the user where the password will be e-mailed.
7. Leave the External Link field blank.
8. Select the **Responsible for Printer Queue** option if applicable.
9. To activate the user upon creation, leave the user status as **Enabled**.
10. Select the appropriate User Type option.
11. Select the **Super User** option if the user should be given access to contact records without adhering to the User Proxy and Contact Assignment rules. This option should be selected only if Office Security is enabled and the user will not be sharing or becoming the Specialist for another user.
12. Select the appropriate User Role Template from the corresponding drop-down list; or, leave the field empty to specify the roles at a later time.
13. Select the **Create Calendar Activities for all Users** option, if applicable.
14. Select the appropriate option from the View Calendar for Other Users drop-down list.

15. Click **Next** to display the Select User Role(s) dialog box. Note that the wizard cannot return to the previous screen. If any of the settings require a change, the settings can be changed after creating the new user by accessing their user details.



16. Select the appropriate Basic role. If the user is a non-eOCS user, select **Base SmartOffice**. Note that depending upon the licenses purchased, many of the options shown above may not display.

17. Specify the appropriate privileges and licenses to be distributed and then click **Next** to display the second Select User Role(s) dialog box.



18. Select the appropriate Module Access Control options and then click the **Finish** button.
19. The New User Added Successfully dialog box opens displaying the User Name and Password (system generated) and an e-mail is sent with the User Name and Password to the administrator and to the new user. The Modify This User and Add Another User hyperlinks are available either to modify the current user details or to add another user.
20. After the newly created user logs into the office with the system-generated Password, the Change Password dialog box displays prompting the user to change the system-generated password to a user designated one. The changed password should then be used for subsequent logins.