



PageMaster: User Registration

At A Glance:

New users may now request access to the WebApproval or ProjectManager system via the PageMaster user interface. This is available for both new and existing companies and users.

Applies To:

Portal WebApproval, ProjectManager

How It Works:

For your customers, it's a simple process – request access, wait for a confirmation email, then log on to your system! Internally, you'll access the Registration Requests list and process new requests.

To make it easy, what follows is a step-by-step guide through the process, both from a potential customer's point of view and your internal process.

1. Customer navigates to your PageMaster URL and clicks "New User? Click Here."

2. Customer fills out the form and clicks "Send." All fields must be filled in.

3. Once your Portal system has received the registration request, the customer gets the acknowledgement box seen at the right. The customer does nothing more until you have accepted or declined the request.

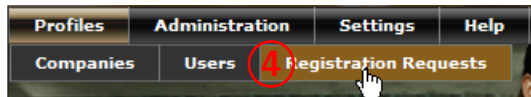


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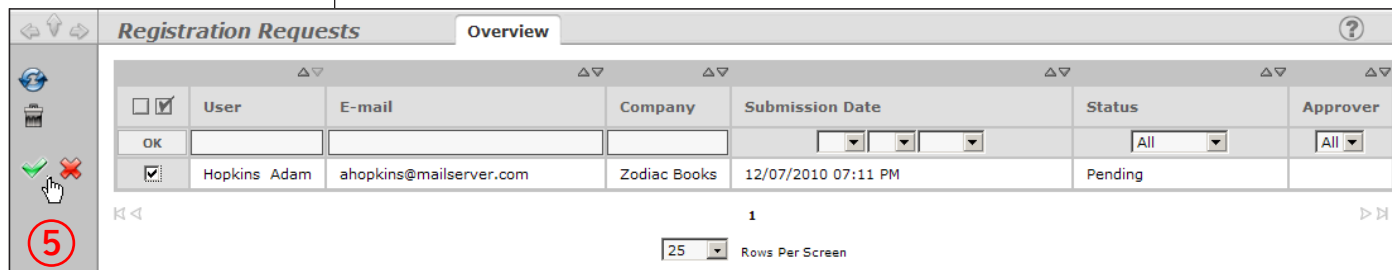
Your Portal system can be configured to notify you when registration requests come in to the system.

Remember, the Classic UI is accessed via your URL, minus the "PageMaster" at the end!

4. To respond to registration requests, you need to access your Portal system via the Classic UI. Then select Profiles > Registration Requests.



5. From the list, select the checkbox next to the request you'd like to process. Then click either the green check mark or the red X in the tool bar to the left. The check mark means you accept the user request; the X means you decline, and no account is created.



6. When you accept a request, you'll see the following dialog. If the Company name doesn't already exist, Portal will automatically select the "Create User in a New Company" radio button and populate the "Company Name" field using the information supplied by the customer. If the company already exists, and there's an exact match of the Company Name between the customer supplied information and Portal, the "Create User in Existing Company" radio button is selected. You can always override the radio button selection. User information comes from the registration request, and Portal supplies a default Username and temporary Password. Click OK when you've completed your selections.

6

Please provide the needed information to register user "Hopkins Adam".

Company

☐ Create User in Existing Company

☒ Create User in New Company

Company Name*:

User

First Name: Adam

Last Name: Hopkins

Username*:

Password*:

Send E-mail Notification: ☒

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7. With WebApproval, when you accept a registration request, the Portal system automatically creates the necessary Company and User information in the Apogee Prepress system.

E	Company	Primary Contact	E-mail
<input checked="" type="checkbox"/>	POD2	POD2 POD2	POD2@mailserver.com
<input checked="" type="checkbox"/>	Pulse Group	Kathryn Silverton	ksilverton@mailserver...
<input checked="" type="checkbox"/>	Black Cat	Julie Newsome	jnewsome@mailserver...
<input checked="" type="checkbox"/>	Zodiac Books	Adam Hopkins	ahopkins@mailserver....

Title	First	Last	E-mail	Phone	Mobile
	Adam	Hopkins	ahopkins...		

8. Upon your acceptance of a registration request, Portal will email login credentials to the user. The customer needs to respond within a week.

Subject: Apogee Portal: Your new account

From: POD2 <POD2@mailserver.com>

Date: 7:17 PM

To: ahopkins@mailserver.com

Dear Adam Hopkins,

Your account has been created or updated in :Apogee Portal.

The username of your account: **AHopkins**.

To edit your username and enter a password: [click here within one week](#).

Once you have logged in, take a few moments to look at the online help introduction from the help menu at the bottom right.



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9. By clicking the link in the email, the customer is taken to your Portal PageMaster URL and is prompted to enter a new password.

A registration form with the following fields: Username (containing 'AHopkins'), New Password, and Confirm New Password. A red circle with the number '9' is next to the New Password field, with a mouse cursor pointing at it. Below the fields is a checkbox labeled 'Remember username and password' and a 'Log On' button.

10. After logging on, the customer is taken to their User Preferences page. The customer may change or update their basic information. Default preferences are set by the Portal system, and may be overridden.

The 'User Management' interface is shown. On the left, a pane for 'Company: Zodiac Books' lists details: Company Name (Zodiac Books), Address (United States of Am), Language (English), and Primary Contact (Adam Hopkins). Below this is an 'Edit' button. On the right, a pane for 'User: Adam Hopkins' shows user details: First Name (Adam), Last Name (Hopkins), Username (AHopkins), and E-mail (ahopkins@mailserver.com). Below these are four roles with checkboxes: User Administrator, Job Manager, Submitter, and Approver. A 'Preferences' section shows Language (English), E-mail Notifications (Immediately), and a checkbox for Use ColorTune Display. A red circle with the number '10' is next to the First Name field. At the bottom, a 'Users' list shows 'Adam Hopkins' with an 'Edit' button and a 'Change password' button. A red circle with the number '11' is next to the 'Change password' button.

11. To change any values, click the Edit button at the bottom left of the User Preferences pane.

Two buttons: 'Edit' and 'Change password'. A red circle with the number '11' is next to the 'Change password' button.

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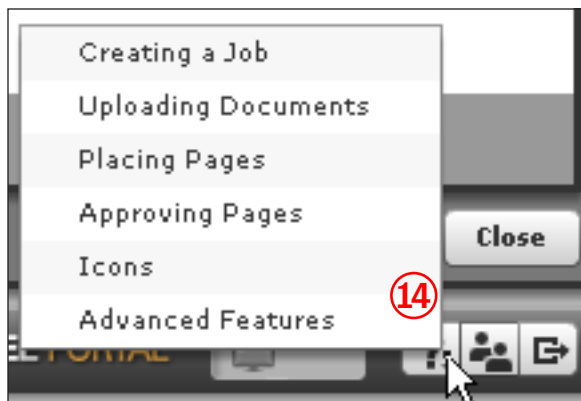
12. To change the password, click the Change Password button at the lower left of the User Preferences pane.



13. To save any changes, click the Save button at the lower left of the User Preferences pane. If you don't want to save the changes, click the Discard button.



14. The customer's acceptance email also refers to various help topics. Once logged in to Portal PageMaster, all help topics may be accessed from the "?" icon in the lower right corner. Several basic topics are supplied by default.



You can create additional help files. Your Portal preferences allow you to add an additional topic header to the list shown. It acts as a clickable link to the location where you've stored additional help documents for your customers.

Why is this Important?

The Portal PageMaster user interface is designed to provide your customers with the most commonly needed features/functions available for upload and approval. Incorporating easy-to-use user registration extends these features and automates the process for you, especially for WebApproval.