cegid

CegidLife: Administrator's Manual



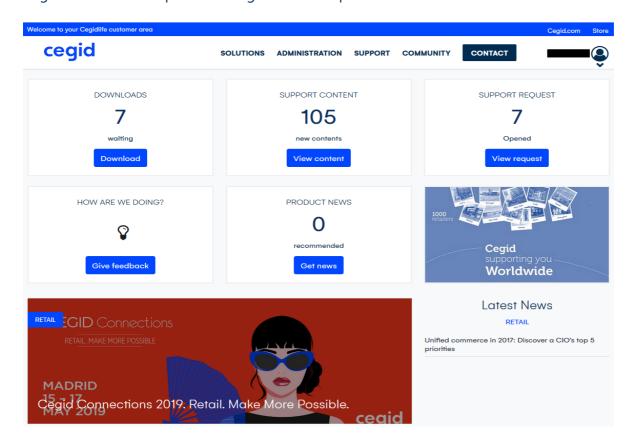
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1/ Client portal

The address of this site is https://www.cegidlife.com. CegidLife is the client portal for Cegid client and partner users.



More specifically, the system allows the user to **get information about their** Cegid products, to access **update downloads**, to search for information via **the knowledge base** or to make a **support request**.

Every CegidLife user has a username (email) and password which are **personal** as well as **access rights** (subscriptions) that enable the user to access the various services of the portal.

Each username is unique and only linked to one specific client account.

In order to ensure proper management of users within CegidLife, each client account must have a minimum of one user with administrative rights (subscribed to the **Gestion des Utilisateurs - Administration (...)**).

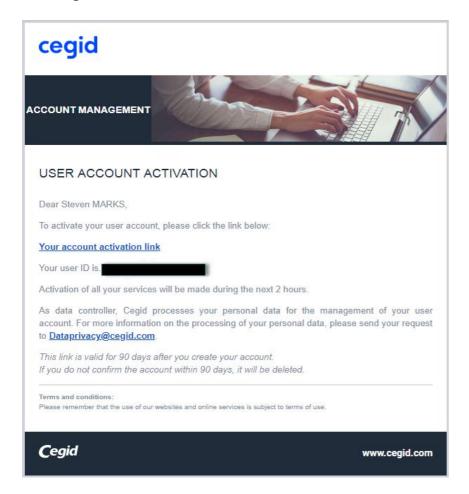
This user is usually the main point of contact in the Cegid database.

However, several users per client account may be assigned to the user administration service.



2/ Activation of the CegidLife account

The user will receive an email (from **administrateur@cegidlife.com**) with directions on how to **activate** their CegidLife user account.



From there, simply clicking on the link: **Your account activation link** included within the message leads to a page with steps to validate the user account.

- -In **Step 1**, the user is given the chance to confirm and edit personal information (first and last name, preferred language settings)
- -Step 2 involves providing contact information (office line and cell phone, email address, job title)
- -Step 3 enables the user to create a personalized password to connect to CegidLife.

From there, set-up is completed with a click on the

Validate

button.

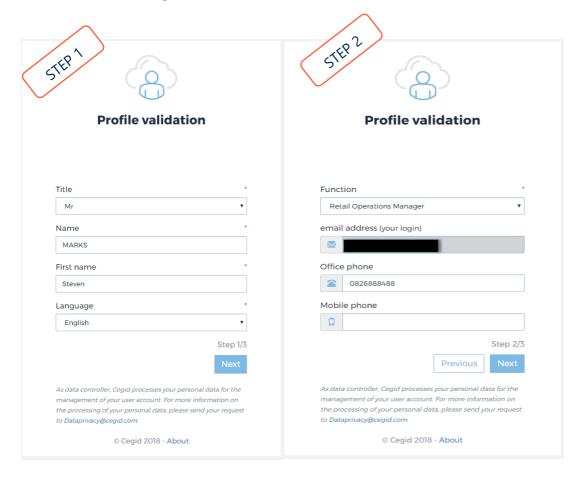


The user's email address is their username, and the same email cannot be used for a second account.

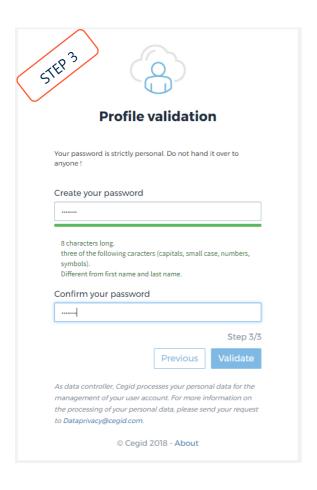
The user will receive a confirmation email stating that the user account has been successfully created.

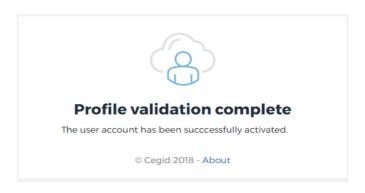
From there, there is a **30-minute** delay before being able to sign onto the new account on www.cegidlife.com.

Account creation steps:







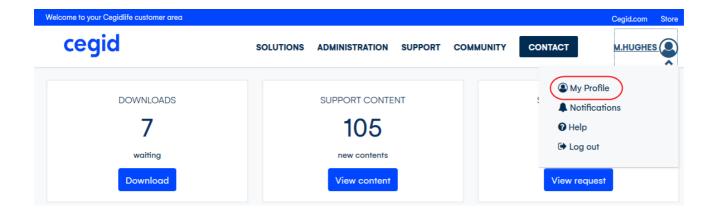


NB: passwords can be created at weak, moderate, or strong security levels. The "weak" ranking will not grant access to certain permissions which may require a minimum of a moderate-level password (*Example*: SaaS Administrator)

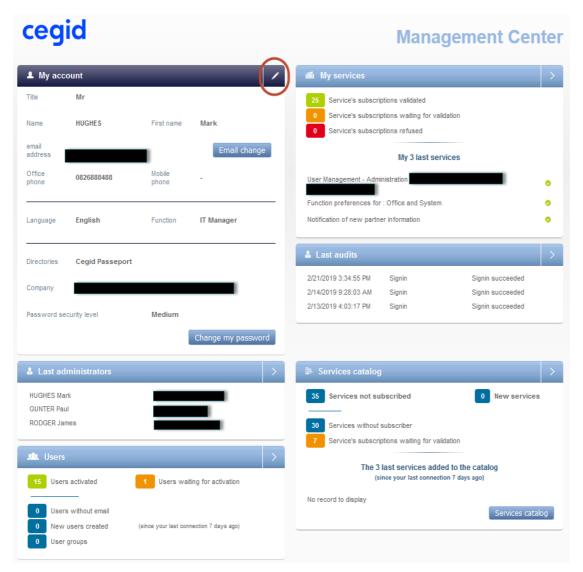
- *Moderate*: 8-character minimum including 3 different character types (uppercase, lowercase, numbers, or special characters). Must not contain 3 consecutive characters that are also found within the user's first or last name. No recycling of previously-used passwords. Changes every 90 days. Account locked after 5 unsuccessful sign-in attempts.
- *Strong:* 10-character minimum including 3 different character types (uppercase, lowercase, numbers, or special characters). Must not contain 3 consecutive characters that are also found within the user's first or last name. No recycling of previously-used passwords. Changes every 90 days. Account locked after 5 unsuccessful sign-in attempts.

Info such as title, first/last name and email address can be changed when logging on to www.cegidlife.com, by clicking on the **last name**, then **My Profile**



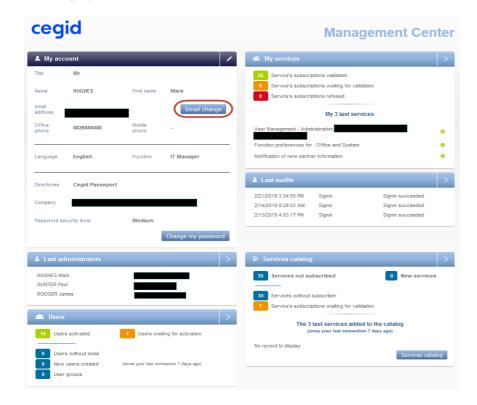


From there, click on the pencil-shaped edit icon:

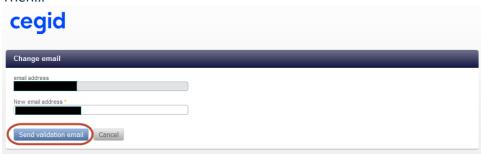




To change your email address:



Then...

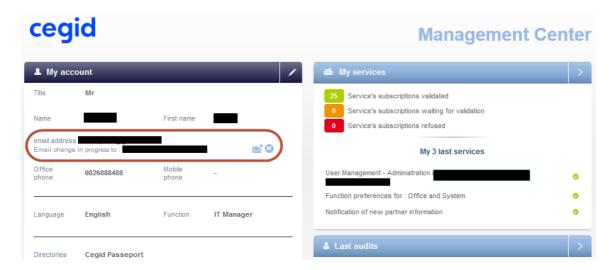


Then...



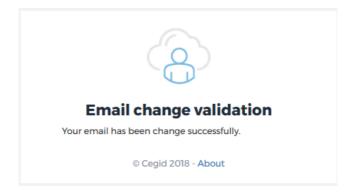


On the profile page, the change is visible:



The following message will then be sent to the new inbox:







3/ Connecting to the CegidLife account

To access the custom space within CegidLife, the user must first sign in through filling out the **Email** address field along with the **Password** field by entering the password established during account activation (*see chapter 2*).

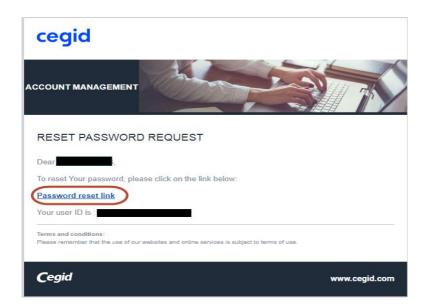


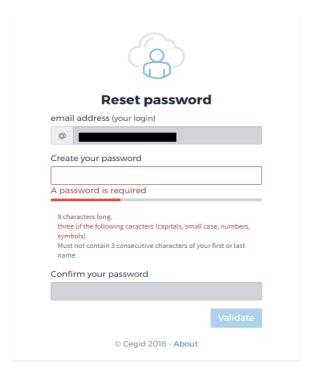
In the event of a lost password, the user must follow the procedure described in the **Forgotten** password section.

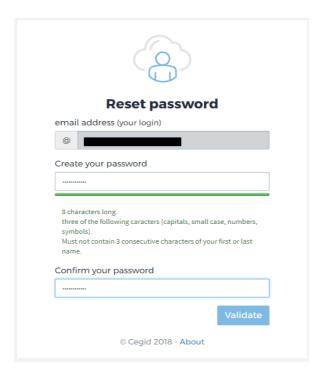


Please note: it can sometimes take several minutes to receive the reset password message. Clicking multiple times on **Forgotten password** is unnecessary and not recommended; it runs the risk of receiving multiple reset emails and/or a blocked-account error message.



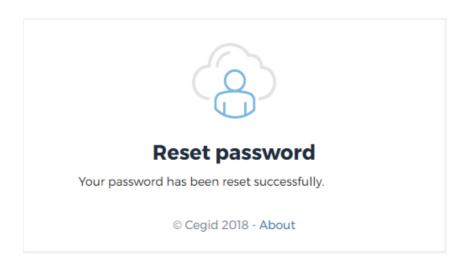






The **Validate** button will only be activated once both passwords have been shown as identical and in compliance with minimum security requirements.





After identify verification, the user is able to access their CegidLife homepage.



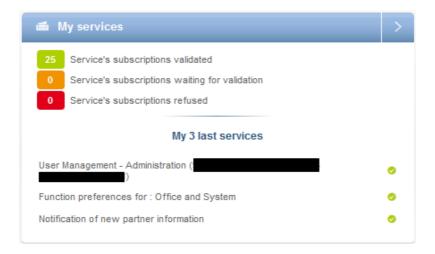
4/ User profile information

As noted previously, each user has access to profile information via their profile page (see chapter 2).

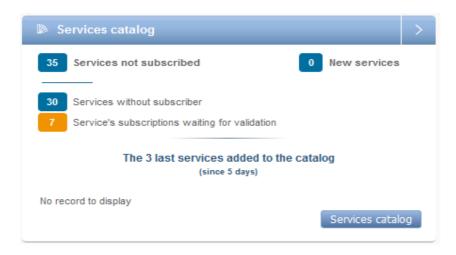
This is the space containing contact info and last name of account administrator(s)



The list of services (subscriptions) to which they have access



The services catalog which can be added to their profile



The administrator is equipped with advanced permissions in the user management interface.

This role can be distinguished by the following icon: ...



The administrator can create new user accounts and grant new subscriptions to services, but also remove subscriptions from company user accounts and even remove user accounts entirely when necessary.



5/ The role of administrator

Upon creation of a CegidLife account, the administrator receives an account activation email.

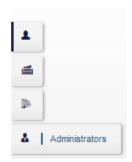
5.1 Identifying the administrators

left side of the screen:

Each user can find the list of the administrators for their company in a panel on the profile page

Last administrators

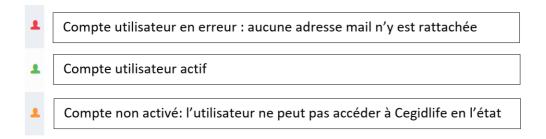
, or by clicking on the Administrators icon on the



5.2 Activating user accounts

In order to access the CegidLife portal, each user must activate their account via the activation message received from **administrateur@cegidlife.com**.

The administrator can check the user list and status via user management:

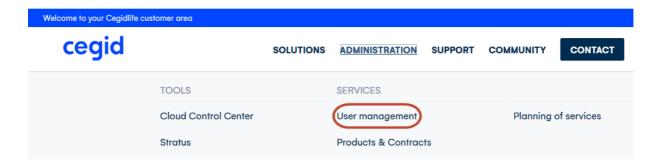


To access this, the administrator clicks **User Administration/ Management** from the CegidLife homepage:



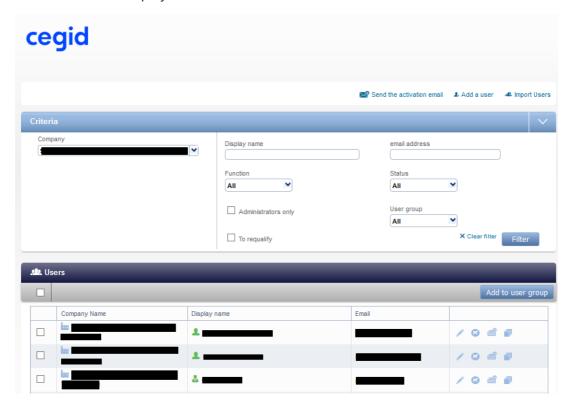


Then...



The list of created users will be displayed.





The administrator can check all non-activated users (orange icon) and send them a mass activation

message by clicking on

Each user selected will receive the activation message from their CegidLife account.

5.3 User base management

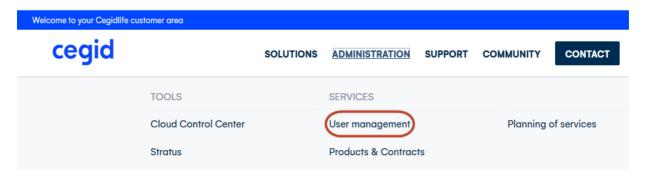
The administrator manages the CegidLife user base.

It is possible—and even recommended—to assign more than one administrator.

To do this, simply sign up another user to the service called **User Management - Administration (... account number and name...)** in the Management section.

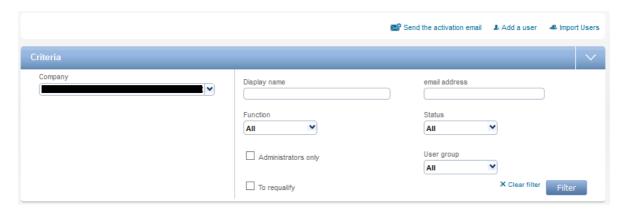


To manage user accounts, the administrator clicks on **Administration/ User Management** from the CegidLife homepage:



This option, reserved for administrators, displays all users of the account listed on CegidLife.

It is possible to search users by last name (**Full name** field) or email (**Email address** field), as well filtering the list in the **Function** zone or searching by user account **Status**.



For each user on the list, the administrator is able to:

- **Delete** the user via the corresponding icon $^{\boxtimes}$
- **Modify** the user with the corresponding icon
- Add subscriptions for a user with the corresponding icon
- Display the full list of subscriptions for a user with the corresponding icon

When deleting a user, a confirmation message is sent following the action:





The options at the top of the list allow additional actions by the Administrator.



- Sending the account's activation email:

The administrator can access a list of specific users who have not yet activated their CegidLife.com account.

It is possible to filter users by **Status**



Simply select the users (either individually by clicking the box in front of their name or select all by clicking

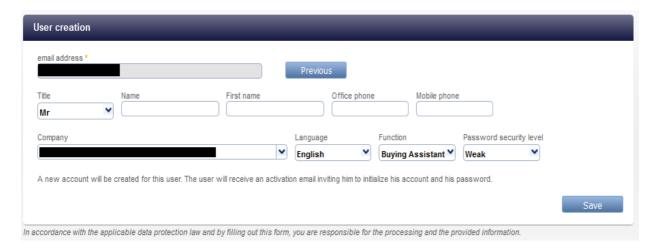
the box at the top of the column), and then hit the confirm button

Each user selected will receive the activation message from their CegidLife account.

- Creating new users:

It's mandatory to complete the fields of the form and be sure to enter the user's correct email address.





Then hit the Save button to confirm the action.

The user will automatically receive a message that allows activation of the CegidLife account (see chapter 2).

CegidLife verifies that the email address is not already in use. In such an event, an error message will be displayed:

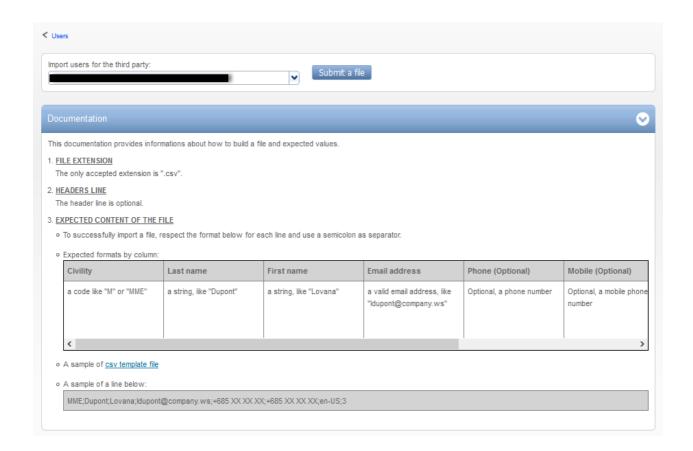


If this occurs, the account in question must be located (see section 5.3).

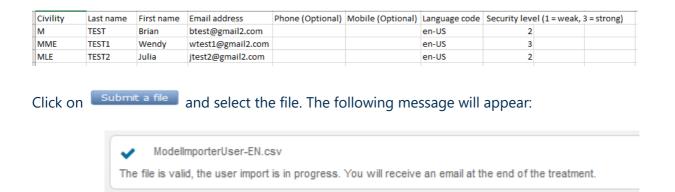
- To create users by file import:

This option allows you to create multiple CegidLife user accounts at once using a file.

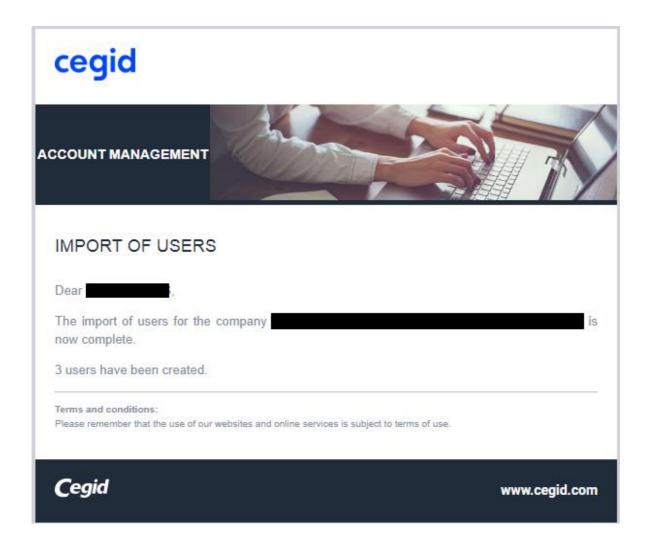




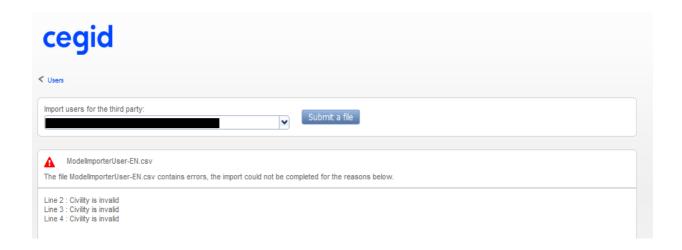
The file must be in the csv format (comma-separated values) and contain the following data:



A message from **administrateur@cegidlife.com** is then sent to the user who imported the file, confirming the end of the processing of user account creation, and listing any possible anomalies.



If the file has an error, the following message will appear during the import process:





6/ Definitions of subscription and service

6.1 Information on Services

The services within the user management tool allow you to define the information that each user will see on Cegidlife.

		٨II
These services are ord	ganized by Family: 🚡	

Administrative	Controls access on CegidLife to administrative documents linked to the client account (invoices, etc.)
Community	Includes services linked to social network functions (community areas)
Information flow	Controls information sent from Cegid by email on identified topics (Support, Sales, Administrative, etc.)
Management	Controls management of the user base (create new user accounts, manage subscriptions to different services, etc.)
Product information	Controls information related to product subscriptions
Notifications	Controls set-up of notification settings (on events, products, updates, etc.)
Preferences	Controls the areas for which each user can benefit from content that will be available within the portal interface. If the user is subscribed to the service "Functional preference: Accounting," the user will see all content pertaining to the subject of Accounting.
Online services	Controls access to online applications (EWS, RIB banking key conversions, etc.). These services are only available for paid subscriptions
Support	Controls access to Cegid support services: downloads of updates, troubleshooting support requests, FAQs, etc. These services are only available for paid subscriptions

The list of available services depends on the products and contracts acquired from Cegid. This list can change in accordance with additional purchases or additional contract subscriptions.



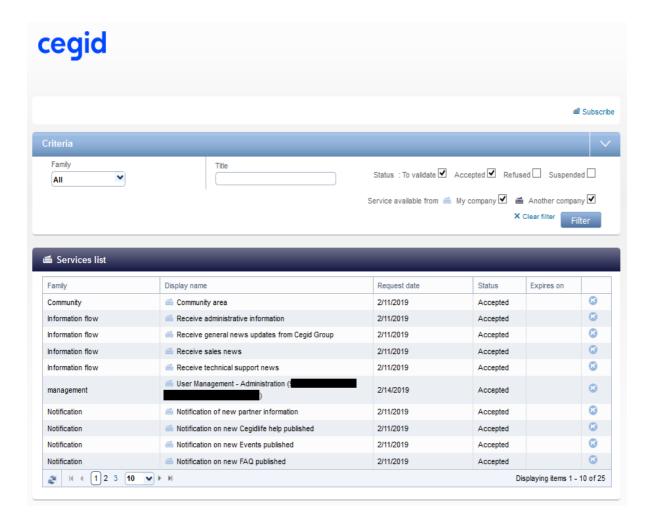
6.2 My services

The list of services may be accessed in a number of ways.

From the profile page in the My Services area or via the buttons to the left of the screen:



Each user can find a list of all the services to which he or she is subscribed.



This list can be filtered by type and by status.

The user can also search for services by entering keywords in the box **Description**. The user can delete a subscription from the list by clicking on the **cross** at the end of the line.

It's possible to resubscribe to the service via Subscribe or through the tab Services catalog on the left side of the screen.

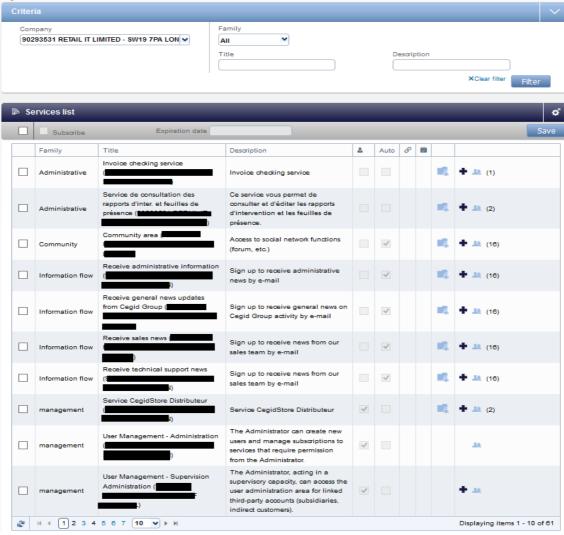




A delay time of up to two hours is required for the modification to take effect in the portal interface.

6.3 Services catalog

The **services catalog** lets you view the list of available services on behalf of another user. A standard user will only see the services to which he or she is not currently subscribed (those not present on **My Services** list).



The user clicks on the icon to activate a subscription. From there, a confirmation email is sent.





Subscription to certain services may require validation from an administrator. The list of administrators can be found in *Last administrators* on the profile page or under the *Administrators* tab on the left side of the screen:





An administrator will see the list of all the services linked to the selected user account.

For each service, the administrator can see the list of users subscribed by clicking 4.



An administrator can also decide whether subscriptions should be automatically added to a user account upon creation or subject to validation by a Cegidlife administrator.

All subscriptions/services available for the CegidLife account are displayed in the Services catalog:





In the header **Services list**, click the button:

☐ Subjected to validation ☐ Users will be automatically subscribed to this service



Select the applicable subscriptions by clicking the box on the sub-menu, or select subscriptions one-by-one using the boxes to the left of each subscription.

Then select whether t	his selecti	on should be	☐ Subjected	to validation	by a CegidLife ac	dministrator or
whether Users will	be automa	tically subscribe	d to this service	when cre	ating the user acc	ount.
From there, click the	Save	button.				

For each subscription, two columns will appear that determine whether the subscription is subject to validation automatically.

6.4 The most frequently-used services

For an employee who needs to view and download copies of invoices, sign the user up for Invoice viewing service (subscription available in the Administrative section).

For an employee who needs to view and download attendance sheets or intervention reports, sign the user up for Intervention reports and attendance sheet viewing service (subscription available in the Administrative section).

For an employee who needs to view the Cegidlife Knowledge Base, sign the user up for View FAQs (subscription available in the Support section).



For an employee who needs to submit support requests through the Cegidlife portal, sign the user up for Request service (subscription available in the Support section).

For an employee who needs to submit support requests through the Cegidlife portal as well as track and view requests of other employees, sign the user up for Request service - Administration (subscription available in the Support section).

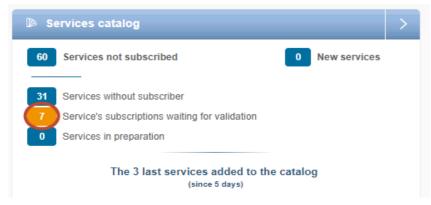
For an employee who needs to submit support requests through the Cegidlife portal as well as track and view requests of other employees on the main site as well as associated sites, sign the user up for Request Service – Supervision (subscription available in the Support section). This subscription can only be accessed provided that the sales representative for the account is aware of the link between these entities and has transcribed these links into Cegid's tools.

To assign an employee the role of CegidLife administrator, subscribe the user for **User Management Administration** (subscription available in the **Management** section).

In SaaS: if a new SaaS Administrator has been assigned to manage the platform, the new employee must be signed up for SaaS Administrator in the Management section and Cloud Control Center in the Support section

6.5 Validating requests

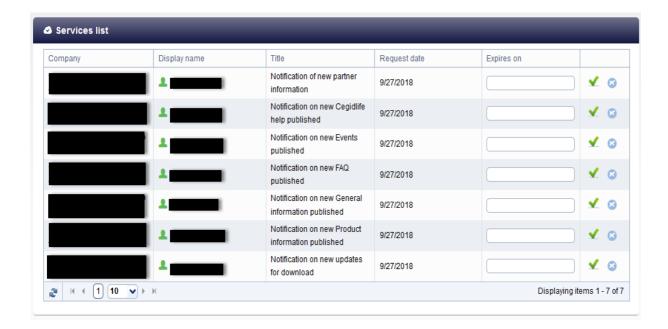
Any user assigned administrator permissions has access to the list of subscription requests pending validation.



Then:







The administrator can accept or deny requests by clicking the and icon respectively.

The administrator can also grant access to the subscription for a specific duration, by submitting an end date in the column **Expires on**.

The user who made the original subscription request will be informed via email as to the administrator's chosen course of action (acceptance or refusal).

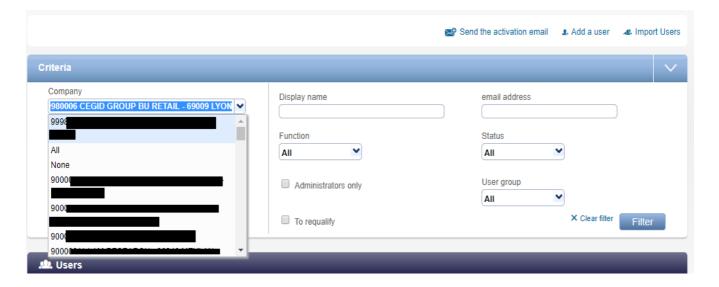


7/ The notion of third-party associates

Customers who have third party associates, subsidiaries, shops, customers (for Distributors/Partners), or secondary sites will have services included in their catalog called **User Management - Administration Supervision of (name of third-party...)** in the **Management** section.

Users signed up for the **User Management - Administration Supervision of (name of third-party...)** will thus have administration permissions for the third-party users listed in the service's individual name.

This way, such users will be able to manage third-party accounts through the **Third-party associates** section:





8/ Appendix: A few examples...

8.1 View copies of assistance invoices

To gain access to this service, you must first be granted access to the subscription **Invoice viewing** service in the **Administrative** section.

If the subscription was validated over two hours before, simply return to the CegidLife homepage, click **Administration** then **invoices**.

In this area, you can view all the invoices and credits issued for assistance and maintenance.

8.2 View all applications acquired from CEGID

From the CegidLife homepage, click administration then Products and Contracts: Filter bases by machine **ID** number Filter bases by material or software Votre parc informatique / Your IT assets Société / Company : Identifiant / PC ID: Tous / All Progiciels & Logiciels Système / Software Matériels / Hardware ✓ Sous contrat / On contract ☐ Hors contrat / Off contract 🙆 Appliquer l'**identifiant** saisi ci-contre à la sélection ci-dessous en cliquant sur la clé Click on the key to apply the ID on the left to the selection below Filter bases to see which are under Establish a new serialization for all or part of your software. contract and which are Only contracted products may be serialized not

8.3 Service tracking (on-site intervention/training)

After an order has been submitted, a date for the intervention will have been selected (order placed via CegidStore) or determined with our deployment service, then the purchase order validated by the sales agent.

To check the date and/or obtain WebEx presentation access codes, simply visit the CegidLife homepage and click on the **Administration** button, then **Planning of services**.



A calendar will be displayed:

<	FEBRUARY 2019				>	
MON	TUE	WED	THU	FRI	SAT	SUN
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

Please note: this information will be available **only** on the CEGIDLIFE account of the recipient of the training, or the contact person for the order.

Clicking on a given date will make additional information appear.

8.4 View attendance sheets and intervention reports.

To gain access this service, you must first be granted access to the subscription **Intervention report and attendance sheet viewing service** in the **Administrative** section.

If the subscription was validated over two hours before, simply return to the CegidLife homepage, click **Administration** then **Intervention report & attendance sheet**.

All elements can be downloaded or printed from this space.