

ABOUT USER MAINTENANCE

Introduction

This section describes how **Employer System Administrators** can manage user access to the Employer account. The person who completes the Employer Registration or Account Activation is assigned the Employer System Administrator role by default. This user receives login credentials to access the QUEST self – service account during the registration or activation session.

The system administrator can in turn create accounts for other users and assign roles to those users. Role assignments dictate which functions users can perform.

The activities that are described in this section include:

- Creating a new user
- Searching for user details
- Modifying user information
- Assigning user roles
- Resetting user passwords
- Inactivating a user account
- Reinstating a user account

NAVIGATING TO USER MAINTENANCE

To navigate to **User Maintenance**, perform the following steps:

1. Log in to QUEST. Click the **User Maintenance** link in the left pane (the link also appears on the main pane of the Employer Home page).

The screenshot shows the QUEST Employer Home page. At the top left is the Commonwealth of Massachusetts logo. At the top right is the date "Tuesday, July 19, 2011" and a "Print Preview" link. Below the header is a navigation bar with "Change Password" and "Logoff" links. The left navigation pane contains several links: "Employer Home", "FAQ", "Workflow - My Inbox", "Account Maintenance", "Benefit Charge Activities", "Correspondence", "Employment and Wage Detail Reporting", "Payment Information", and "User Maintenance". The "User Maintenance" link is circled in red. The main content area is titled "Employer Information" and "Employer Home". It displays "Employer Account Number" and "Employer Name" with redacted values. Below this, there are several sections with links and descriptions: "FAQ" (Review frequently asked questions), "Workflow - My Inbox" (View any action items), "Account Maintenance" (Maintain account information), "Benefit Charge Activities" (View Benefit Charges), "Correspondence" (Search for Correspondence), "Employment and Wage Detail Reporting" (Submit Employment and Wage Detail Reports), "Payment Information" (Make payments), and "User Maintenance" (Assign or Update user access).

2. The **User Maintenance** page appears.

CREATING A NEW USER

1. Click **User Maintenance**.
2. Click **Employer Roles**.

The screenshot shows the QUEST web application interface. At the top left is the Commonwealth of Massachusetts logo. The date 'Thursday, June 09, 2011' and a 'Print Preview' link are at the top right. Below the header is a navigation menu with 'Change Password | Logoff'. The main content area is divided into two columns. The left column contains a list of links: 'Employer Home', 'FAQ', 'Workflow - My Inbox', 'Account Maintenance', 'Benefit Charge Activities', 'Correspondence', 'Employment and Wage Detail Reporting', 'Payment Information', and 'User Maintenance'. The right column has a blue header 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'. Below that is another blue header 'User Maintenance' with a sub-header 'Employer Roles' circled in red. A tooltip points to the 'Employer Roles' link with the text: 'Assign or update user access to Employer account information.'

3. The **User Search Criteria** page appears. Click **New**.

The screenshot shows the 'User Search Criteria' page. It has a blue header 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'. Below that is another blue header 'User Search Criteria'. The form contains input fields for 'User ID', 'Last Name', 'First Name', and 'Roles' (with a dropdown menu set to 'Any'). At the bottom are three buttons: 'Search', 'Reset', and 'New'. A callout box with a pointer to the 'New' button contains the text: 'Click New to create a new user'.

4. The **User Details** page appears. Enter information about the user. Fields with an asterisk are required. Click **Save**.

The screenshot shows the 'User Details' page. It has a blue header 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'. Below that is another blue header 'User Details'. The form contains several input fields, each with a red asterisk indicating it is required: 'First Name', 'Middle Initial', 'Last Name', 'eMail', 'Employee ID', and '4-digit PIN Code'. There are also fields for 'Telephone' (with an 'ext' sub-field) and 'Effective Start Date' and 'Effective End Date' (both with date format hints '(mm/dd/yyyy)'). At the bottom are two buttons: 'Save' and 'Cancel'. Below the form is a 'New Comments' section with a text area and scrollbars.

5. The **Password Link Sent** page appears. Click **Next** to return to the **User Search Criteria** page.

Employer Information	
Employer Account Number: [REDACTED]	Employer Name: [REDACTED]
Password Link Sent	
An eMail message has been sent to the user containing an encrypted link which that user can use to login to the system and establish a password.	
You must now assign roles for the user just created. In order to assign role(s), select 'Next', search for the User by name or User ID. Select the user, then select 'Roles'.	
Note: This password link will only be effective for the next 96 hours .	
<input type="button" value="Next"/>	

NOTE: When you create a new user, the system generates an email message to that user. The message contains a link. When the user clicks the link, a browser launches with a special login page. The user enters a Password of their choosing, selects a security question, answers the security question, and sets a PIN from this page.

6. Before the user can access any functions in QUEST, you must assign them roles. See the section, *Assigning User Roles*.

SEARCHING FOR USER DETAILS

1. Click **User Maintenance**.
2. Click **Employer Roles**.

The screenshot shows the QUEST interface for the Commonwealth of Massachusetts. The top right corner displays the date "Thursday, June 09, 2011" and a "Print Preview" link. The main navigation menu on the left includes "Employer Home", "FAQ", "Workflow - My Inbox", "Account Maintenance", "Benefit Charge Activities", "Correspondence", "Employment and Wage Detail Reporting", "Payment Information", and "User Maintenance". The "Employer Roles" link is circled in red. The main content area shows "Employer Information" with fields for "Employer Account Number" and "Employer Name", and "User Maintenance" with a description: "Assign or update user access to Employer account information."

3. The **User Search Criteria** page appears. Enter search criteria (or leave blank to return all users) and click **Search**.

The screenshot shows the "User Search Criteria" page. It includes fields for "User ID", "Last Name", "First Name", and "Roles" (set to "Any"). There are "Search", "Reset", and "New" buttons. A callout box with a speech bubble points to the search fields and contains the text: "Enter search criteria and click Search to find an existing user".

4. The search results display below the search grid. Click a **User ID** to display user details.

The screenshot shows the "User Search Results" page. It features a table with the following data:

User ID	Last Name	First Name	Eff. Start	Eff. End
user id	████████	v	6/9/2011	

A callout box with a speech bubble points to the "user id" link in the table and contains the text: "Click a User ID to display User Details". Another callout box points to the search grid area and contains the text: "Search results display below the search grid".

5. The **User Details** page appears.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
User Details	
User Type:	Employer
User ID:	████████
First Name:	████████
Middle Initial:	████████
Last Name:	████████
Telephone:	████████
eMail:	████████
Employee ID *	████████
PIN Code *	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred
Modify User Attributes	
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

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MODIFYING USER INFORMATION

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Modify**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
User Details	
User Type:	Employer
User ID:	████████
First Name:	████████
Middle Initial:	
Last Name:	████████
Telephone:	████████
eMail:	████████
Employee ID:	████████
PIN Code:	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred
Modify User Attributes	
Modify	Update the basic information for this user.
View	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.
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3. An editable version of the **User Details** page appears. Add or edit information and click **Save**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
User Details	
User Type:	Employer
User ID:	tterrif01
First Name:	████████ *
Middle Initial:	
Last Name:	████████ *
Telephone:	████████ ext: <input type="text"/>
eMail:	████████ *
Employee ID:	1234 *
4-digit PIN Code:	1234
Effective Start Date:	7/29/2011
Effective End Date:	<input type="text"/> (mm/dd/yyyy)
Last Logged On:	
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	
Security Answer:	
Previous Comments	
<div style="border: 1px solid gray; height: 40px;"></div>	
New Comments	
<div style="border: 1px solid gray; height: 40px;"></div>	
Save Cancel	

ASSIGNING USER ROLES

Introduction

The specific functions a user can perform are dictated by the user's role assignments. For example, a user with the role **Employment and Wage Detail View Only** can view employment and wage detail transactions, but cannot submit employment and wage detail reports.

Roles assignments include:

- Account Maintenance Update and Submit
- Account Maintenance View Only
- Benefit Charges Protest Submission
- Benefit Charge View Only
- Employment and Wage Detail Update and Submit
- Employment and Wage Detail View Only
- Employer System Administrator

To assign or change role assignments, follow these steps.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Roles**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
User Details	
User Type:	Employer
User ID:	████████
First Name:	████████
Middle Initial:	████████
Last Name:	████████
Telephone:	████████
eMail:	████████
Employee ID ®	████████
PIN Code ®	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred
Modify User Attributes	
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

- The **Assign Roles** page appears. Check roles in the **Current Roles Assigned to User** area to flag them for removal. Check roles in the **Available Roles** area to flag them for assignment. Click **Save**.

The screenshot shows the 'Assign Roles To User' interface. At the top, it displays user information: User Type: **Employer**, User ID: **terrifi01**, and Name: [REDACTED]. Below this is the 'Current Roles Assigned to User' section, which includes a 'Remove' header and a list of roles. The first role, 'Employment and Wage Detail Update and Submit', has a checked checkbox and is highlighted with a callout box labeled 'Current Role Assignments'. The 'Available Roles' section follows, with an 'Add' header and a list of roles. The role 'Employment and Wage Detail View Only' has a checked checkbox and is highlighted with a callout box labeled 'Available Role Assignments'. Another callout box on the left points to the checkbox of 'Employment and Wage Detail Update and Submit' with the text 'Check box and click Save to remove role'. A second callout box on the left points to the checkbox of 'Employment and Wage Detail View Only' with the text 'Check box and click Save to assign role'. At the bottom of the form are 'Save' and 'Cancel' buttons.

Assign Roles To User	
User Type:	Employer
User ID:	terrifi01
Name:	[REDACTED]
Current Roles Assigned to User	
Remove	
<input checked="" type="checkbox"/>	Employment and Wage Detail Update and Submit Description: Employment and Wage Detail Update and Submit
Available Roles	
Add	
<input type="checkbox"/>	Account Maintenance View Only Description: Account Maintenance View Only
<input type="checkbox"/>	Benefit Charges Protest Submission Description: Benefit Charges Protest Submission
<input checked="" type="checkbox"/>	Employment and Wage Detail View Only Description: Employment and Wage Detail View Only
<input type="checkbox"/>	Account Maintenance Update and Submit Description: Account Maintenance Update and Submit
<input type="checkbox"/>	Employer System Administrator Description: Employer System Administrator

RESETTING USER PASSWORDS

When you a user's password, an email message is automatically sent to the user. The message contains a link; when the user clicks the link, a browser is launched in which the user can reset the password.

Follow these steps to begin the reset password process.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reset Password**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████

User Details	
User Type:	Employer
User ID:	████████
First Name:	████████
Middle Initial:	████████
Last Name:	████████
Telephone:	████████
eMail:	████████
Employee ID:	████████
PIN Code:	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred

Modify User Attributes	
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

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3. The **Reset Password** page appears, requesting confirmation that you wish to reset the password. Click **Confirm** to continue.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████

Reset Password	
Are you sure that you wish to reset the password for: ██████████	
This action will cause the system to send a secure link to the user's eMail address for the user to click and create a new password.	

[Confirm](#) [Cancel](#)

4. The **Password Link Sent** page appears. Click **Next** to return to the **User Details** page.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████

Password Link Sent	
An eMail message has been sent to the user: ██████████	
Note: This password link will only be effective for the next 96 hours.	

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NOTE: Until the user follows the link to reset their password, their account access remains blocked.

NOTE: The password link is only active for 96 hours.

INACTIVATING A USER ACCOUNT

Follow these steps to inactivate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Inactivate**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
User Details	
User Type:	Employer
User ID:	████████
First Name:	████████
Middle Initial:	████████
Last Name:	████████
Telephone:	████████
eMail:	████████
Employee ID ⓘ	████████
PIN Code ⓘ	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred
Modify User Attributes	
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.
<input type="button" value="Previous"/>	

3. The **Inactivate User** page appears. Click **Confirm**.

Employer Information	
Employer Account Number:	████████
Employer Name:	████████
Inactivate User	
Are you sure that you wish to inactivate the user: ██████████	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

REINSTATING A USER ACCOUNT

Follow these steps to reinstate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reinstate**.

Employer Information	
Employer Account Number:	██████████
Employer Name:	██████████
User Details	
User Type:	Employer
User ID:	██████████
First Name:	██████████
Middle Initial:	██████████
Last Name:	██████████
Telephone:	██████████
eMail:	██████████
Employee ID:	██████████
PIN Code:	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred
Modify User Attributes	
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Reinstate	Reinstate the user's access to the system.
<input type="button" value="Previous"/>	

3. The **Reinstate User** page appears. Click **Confirm**.

Employer Information	
Employer Account Number:	██████████
Employer Name:	██████████
Reinstate User	
Are you sure that you wish to reinstate the user: ██████████	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	