

Utility Admins – Maintenance of UAO Representatives


Once the Utility Admin reviews and approves the ISA user's request for access to PSEE, the external user will need to be associated with a utility within PSEE. When the external user is associated with a Utility Company they are then referred to as a UAO Representative. When a UAO Representative is not longer part of a Utility Company, they will also need to be unassociated.

The association action is performed by accessing the Utility Company Members Maint. page. Access to the UAO Maintenance Page is available based on privileges granted.

External user access is limited to the dashboard and functional area summary pages. External users will not have access to the project detail page and will have limited create functions within the application. These activities include viewing data for the projects related to their UAO or projects which they are assigned as a Reviewer or FYI. UAO representatives will also inherit the privilege to add a document and its description as a response to their assignment.

NOTE: External users will be allowed to be associated to multiple UAOs and thus see information related to those UAOs. External users can have more than one ISA account.

Associate UAO and UAO Representative

1. Click the  icon to the right of your name above the main menu to go to the Admin page. You will be taken to the Administration section. If this is the only admin privilege you have, then by default you are taken to the Utility Company Maintenance Page.

NOTE: If you are more than a Utility Administrator, you will need to select "Utility Company Member Maint" from the Admin Menu.

2. In the Utility Company Member Maint area, type the UAO name in the search box. Select the company from the available choice(s).



- Click "Get The ISA Users for This Company". The first time a company is selected it will look like this.

Company Search Results (Click to collapse)

Company:

Name: Walmart - Apalachee Parkway
Parent Company:
Address: 5000 Apalachee Parkway
 Tallahassee, FL 32317
Phone: (850) 566-1234
Email: sales@walmart.com

Find ISA User:

Enter the ISA User's email address or eight character Account ID to find their account and assign it to Walmart - Apalachee Parkway

Select
Assign

No ISA User Record Selected

Users Assigned To Walmart - Apalachee Parkway

Remove

Save Assignments **Cancel Changes**

- Enter the ISA User's email. Select the appropriate user from the available list.

Find ISA User:

Enter the ISA User's email address and assign it to Walmart - Apalachee Parkway

DAUNT, DUANE (DUANEDAUNT@GMAIL.COM)
 DREW, DUANE (DUANEDREW83@GMAIL.COMXX)

- Next click the Select button. Verify the correct user was selected. If so, click Assign.

Find ISA User:

Enter the ISA User's email address or eight character Account ID to find their account and assign it to Walmart - Apalachee Parkway

Found this ISA User account...
ISA ID: S0055442
Name: DUANE DAUNT
Email: DUANEDAUNT@GMAIL.COM

Select
Assign

- The user is now shown in the assigned area for the Utility Company. If more representatives need to be assigned, repeat #4 and #5.

Company Search Results (Click to collapse)

Company:

Name: Walmart - Apalachee Parkway
 Parent Company:
 Address: 5000 Apalachee Parkway
 Tallahassee, FL 32317
 Phone: (850) 566-1234
 Email: sales@walmart.com

Find ISA User:

Enter the ISA User's email address or eight character Account ID to find their account and assign it to Walmart - Apalachee Parkway


No ISA User Record Selected

Users Assigned To Walmart - Apalachee Parkway

S0055442 - DUANEDAUNT@GMAIL.COM

- When all users are assigned, click Save Assignments.

Remove Associated UAO and UAO Representative

- Click the  icon to the right of your name above the main menu to go to the Admin page. You will be taken to the Administration section. If this is the only admin privilege you have, then by default you are taken to the Utility Company Maintenance Page.

NOTE: If you are more than a Utility Administrator, you will need to select "Utility Company Maintenance" from the Admin Menu.

- In the Utility Company Member Maint area, type the UAO name in the search box. Select the company from the available choice(s).

Utility Company Members Maint

Company:

- Walmart
- Walmart - Tennessee
- Walmart - North Monroe
- Walmart - Apalachee Parkway

3. Click “Get The ISA Users for This Company”.

Company Search Results (Click to collapse)

Company:

Name: Walmart - Apalachee Parkway
Parent Company:
Address: 5000 Apalachee Parkway
 Tallahassee, FL 32317
Phone: (850) 566-1234
Email: sales@walmart.com

Find ISA User: Select

Enter the ISA User's email address or eight character Account ID to find their account and assign it to Walmart - Apalachee Parkway

Assign

No ISA User Record Selected

Users Assigned To Walmart - Apalachee Parkway

S0055442 - DUANEDAUNT@GMAIL.COM Remove

Save Assignments Cancel Changes

4. Select the User from the Assigned To box. Click the Remove button.

No ISA User Record Selected

Users Assigned To Walmart - Apalachee Parkway

S0055442 - DUANEDAUNT@GMAIL.COM Remove

Save Assignments Cancel Changes

5. The user is no longer shown in the assigned area for the Utility Company. If more representatives need to be removed, repeat #4.
6. When all users are assigned, click Save Assignments.