

#95b - CYMS Training Guide – Issuing and Maintaining Customer “User Names” and “Passwords”

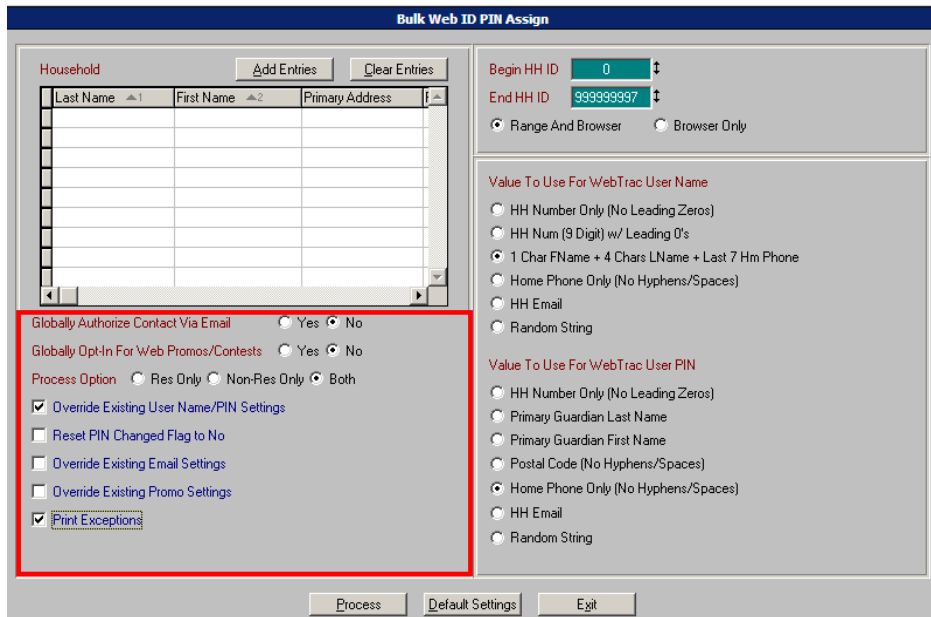
(10.3 – Updated April 2012)

Creating Web “User Names” and “Passwords” for Existing Customers

- Just prior to going LIVE on the Web you will need to run a process that generates Web User Names and Passwords that will allow **EXISTING** customers to login to your website. This is a one-time process.
- Going forward for **NEW** customers, Web User Names and Passwords **should be entered manually during the registration process.**
- Upon first login to the web, customers will be asked to change their Web User Name and Password; however, they are allowed to enter the same Web User Name and Password that was bulk assigned or manually entered.
- Below are the steps associated with automatically creating Web User Names and Passwords in bulk and the process you will use to email this information to your customers.

To Automatically Create ‘Web User Names’ and ‘Passwords’ for Existing Customers

1. Go to **Utilities → System → WebTrac Utilities → Bulk WebTrac ID/Pin Assign**



2. **Left Side of the Screen:** Make your settings match the above screen shot.

- In regards to the **Reset Pin Changed Flag to No** – be sure this is de-selected and when your first time web users log in they will be prompted for a new password.

3. **Right Side of the Screen:** Determine what the **Web User Name** and **Web User PIN** should be.

- a. **Note:** This is a **one time** process to give all of your current patrons an initial web ID and password. When they log into the web the first time, they will be asked to change their login and password (as long as the Reset PIN Changed Flag to No is **de-selected**).

- b. **If you are already LIVE on the Web** you would never run this process with the settings in the screen shot above as it will potentially overwrite people's real User Name and PIN.
- c. Once this bulk process is run, **new customers** will need to give you their Web User Name and Password during the registration process. The clerk would enter it manually into **Household Maintenance** on the **Web Details** screen.

4. Click **Process** and **Yes to Continue**.

- **Print Exceptions:** If anyone shows on this list, you should manually correct their User Name and/or Password in HH Member Update/Web Details before emailing the information to the parents (as described in the next section).

Emailing the 'Web User Name' and 'Password' to Your Customers in Bulk

- Once you have bulk generated the 'Web User Name' and 'Web PIN/Password' for your current patrons, you will need to run a process that emails this information to them using Pass RecConnect.
- For CYMS we will target just the **Active Pass Holder Households**.
- It is **extremely** important that you email your customers only when **you and your web site** are ready. You certainly don't want to email someone a User Name and PIN that can't be used! This will only serve to create frustration and confusion.
- You should use the **SMTP** email option **From Client** in CYMS (which is the preferred method of emailing your customers) and you might consider running from the SERVER.
 - **To find out if you are using SMTP or MAPI** email from CYMS, locate your Email Device in Device Assignments and look at your Email Protocol.

Email Protocol	<input checked="" type="radio"/> SMTP Server	<input type="radio"/> MAPI Compliant Client	<input type="checkbox"/> Obtain Outlooks Contacts...
Send Option	<input checked="" type="radio"/> Send Email From Client	<input type="radio"/> Send Email From AppServer	<input type="radio"/> Queue Emails

- **To Further Ensure Your SMTP Mass Emails work properly** you should:
 - Ensure with your local IT and/or DOIM that **relay** is enabled on the SMTP server side.
 - Just prior to sending the emails, contact IT to **turn off the Anti-Virus software on the client side**. (We know this was a problem with McAfee. This may not be required when using Norton but please check locally to be sure). Once the email process is complete the Anti-Virus will need to be turned back on.
- You may want to consider emailing your Active Pass holder households twice:
 - **First Email:** A teaser email notifying them that their Web User Name and Password will be coming and letting them know all the things they would be able to do on the web.
 - **Second Email:** The actual Web User Name and Password and link to the site.
 - **Note:** The Fort Campbell pilot opted to not include an attachment. They put all of the information into the body of the email. They felt people were more likely to read the email than look at the attachment.
- **For further Email setup instructions and tips** please consult the [Topic Doc – Emailing 10.3-w.pdf](#).

To Automatically Email Your Active Pass Holder Households Their Web User Names and Passwords:

1. Go to Reports → Pass → Pass RecConnect

The screenshot shows the 'Pass RecConnect' application window. It includes a table of pass types, filter options for date ranges and statuses, and a 'Print' button at the bottom.

Pass Type	Pass Description	Statu
CY-CHILD	Child Pass	Activ
CY-MST	MS/Teen Pass	Activ
CY-SAS	School-Age Pass	Activ

Buttons at the bottom: Print, Details >>, Last Settings, Default Settings, Schedule, Templates, Exit.

2. Click **Default Settings** button at the bottom of the page.

3. On the left side of the screen:

- Add the **CY-CHILD**, **CY-MST** and **CY-SAS** passes to the browser.
- In the bottom block (under **Visit Count Limit to Check**), choose **Skip Check**.

4. On the right side of the screen:

- Select **Browser Only**
- **Date Range:** Enter **today's date** thru **1 year later**.
- **Date Option:** Select **Expiration**.
- **Include:** **Actv-New** and **Actv-Renew**. (Note: If you suspend passes, include **Suspended** passes as well).
- On the **Match Option** select **Unique HH**.

5. Click **Print**.

RecTrac RecConnect Options

Total Records Extracted: 18 Highlighted Records: 0

Last Name	First Name	City	State	Zip	Email Address
Austin	Brandon	Fort Irwin	CA	92310	
Bork	Vincent	Ft. Irwin	CA	92310	
Bryant	Denev	Fort Irwin	CA	92310	
Castaneda	Suphina	Barstow	CA	92311	
Fisher	Daugh	Fort Irwin	CA	92310	
Flam	Patrick	Fort Irwin	CA	92310	
Garza	Luis	Fort Irwin	CA	92310	
Gonzales	Stan	Fort Irwin	CA	92310	
Hayes	Shamae	Fort Irwin	CA	92310	
Hustead	Mathew	Fort Irwin	CA	92310	

Process Option: All Records Highlighted Records Only

Process Labels? Process Letters? Process Export? Process Statistics? Create RecConnect History Record

Process Report? Process Email/Text? Print report for records with invalid/no email

History Description: Web User and Password
History Category: MISC

- If you want to **print a report**, choose the **Process Report** option. On the Report Options screen you can toggle it to **Print Email Addresses**.
- If you want to **send an email** to your Active Pass Holder Households, choose to **Process Email/Text** and click **Email Options**.

RecTrac EMail Option Update

Email From: johnm@vermontsystems.com
Email Subject: Online Payments and Services Coming Soon
CC Email Addr:

Skip Text If Email Address Available Process Option: Process Email Only Process Texts Only Both

Email Body: The CYS Services and Online solutions will be live on December 22, 2011! Please find your Web Login and Password below.
<WebID>
<WebPin>

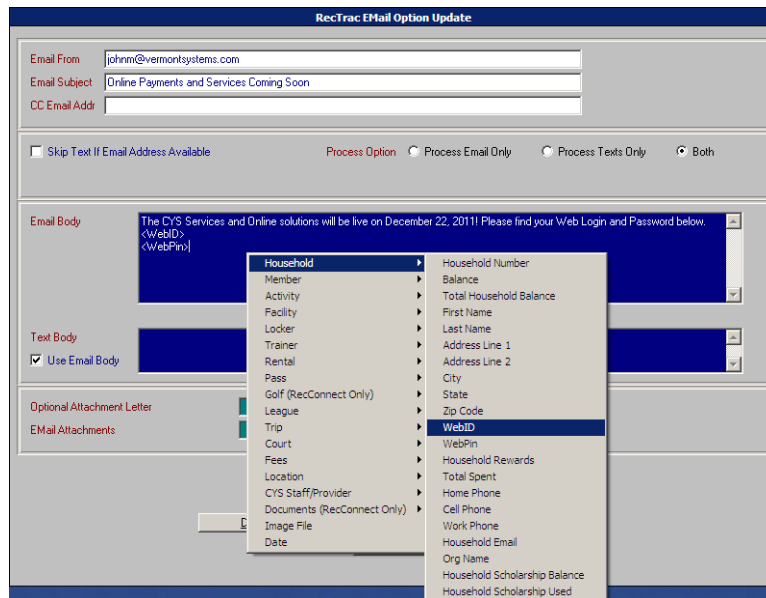
Text Body: Use Email Body

Optional Attachment Letter: Not Selected
Email Attachments:

Default Email Options Email Options Template << Back

- Email From:** If this fills in automatically, **leave it alone**, even if it isn't your email address. This implies that you are set up for SMTP email.
- Email Subject:** Enter the Email Subject here. You should get help from your marketing team on both the subject and the text for the message. You want to make sure what you say is technically and politically correct!
- CC Email Address:** It is not a bad idea to enter your email address here. It could help determine whether your email is successful.
- Process Option:** Determine whether you wish to send email, text or both.

- **Skip Text if Email Address is Available:** Decide accordingly.
- **Email Body:** Enter the message you wish to convey. Attachments can be added, but for this initial email mailing, we suggest you put your information into the body of the letter.
 - **Note:** If you are using the email process to send the customer their Web User Name and Password, you can right click in the Email Text field and select **Household, Web ID** and **Web Pin**. And don't forget to include the link to your web site!!
 - This will show in the Email Text field as <WebID> and <WebPin>; however, when the customer receives their email, the system will fill in the actual user name and password that was created during the Bulk ID/Pin Assignment process.



Text Body: If you elected to send text messages, enter that message here, or, you may use the Email Body by toggling Use Email Body.

Optional Attachment Letter: If you created a letter in **CYMS**, right click and attach it here.

Optional Email Attachments: If marketing created a special document for this purpose outside of CYMS, right click and attach it now.

8. Click **Back**

9. Determine whether you wish to **Create a RecConnect History Record**. If selected, a RecConnect History Record will be linked to the households that were part of this communication. You can view it under HH Inquiry/RecConnect History Tab.

Caution: This is not an indicator that the family actually received the email/text, but rather a way to determine whether someone was slated to receive it. There is no way for us to know whether the email/text was received. Your SMTP server or MAPI client would have a history of emails that were sent or rejected.

Finally, if you do Create a History Record, future emailings will allow you to include or skip patrons who were part of prior communications. This is located on all RecConnect screens under **Details** and the **Additional Options** tab.

10. If you elected to Create a RecConnect History Record, enter a brief description of the purpose of this Email in the **History Description**. This will get linked to the Household in HH Inquiry under the RecConnect History tab.
11. If you elected to Create a RecConnect History Record, right click in the **History Category** and select the type of email this falls under. For instance, you might have a code for Miscellaneous or One Time events. You might also have Categories like Newsletter or Parent Meetings, etc, for ongoing communications.

Linking a History Category will allow you to skip or include patrons who were part of prior communications. This is located on all RecConnect screens under **Details** and the **Additional Options** tab.

12. **BEFORE** clicking Process Selections, realize the following:

- **WARNINGS:**

- If you are in **Demo** and you are linked to an Email device, clicking process will **STILL** send emails to your customers!! There is no “practice mode” when it comes to emails – **when you push send in demo, they go out!!!**
- If your **website is not ready do not continue.**
- If you have **not notified DOIM or IT** that you are about to email X number of customers from either the SMTP client or from your client, **there is a good chance those emails will not get sent due to volume restrictions.**
 - At the pilot site, we emailed customers using SMTP and needed to contact IT to temporarily turn off the Anti-Virus Software on the SMTP side.
- If the **Bulk ID/Pin Assignment** process has **NOT** been run, do not continue.

13. When truly ready, click **Process Selections** and **Print** or **Preview**

How Do I Change or Email a Patron’s Web Username/Password?

1. Go to **Files → Activity → Household Maintenance** or click on the **HH Member Update** button.
2. Select your household.
3. Click the **Web Details** button at the bottom of the screen. The permissions device controls whether you have access to change/email someone’s username and password. Regardless of your permissions setting you cannot view the current web password.

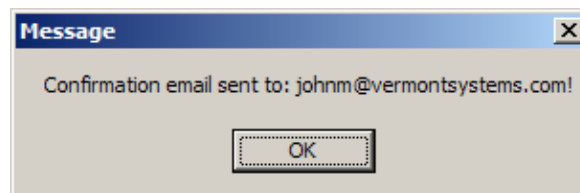


4. Change the **WebTrac User Name** and **New WebTrac Password** and **Re-Enter the New Password.**
 - Usernames and Passwords are **NOT** case sensitive and unlimited in length.
 - Passwords are encrypted the next time you enter this WebTrac User Profile

- The default is to give a Web User unlimited username and password attempts. This can be changed during fielding at the Password Device level. (See information below about Unlocking Users)

5. Click **Done**, or if the customer wishes to have their User Name and Password emailed to them:

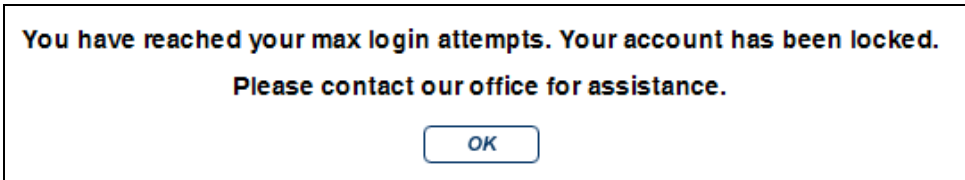
- Click **Email User Name and Password to Household**.
- The clerk should see a confirmation message.



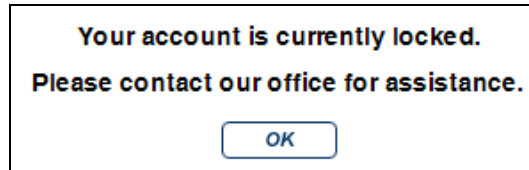
- The customer will receive 2 separate emails. What those emails contain is dependent on the information in the Comment Codes in Web Parameters - Log/Sec screen Forgotten PIN Email 1 and Forgotten PIN Email 2. The idea is that you might send one email with the username and one with the password. Even if you only have one Comment Code entered, a canned VSI message will get sent followed by the one on this screen. The canned VSI message is controlled by the following language codes: 5239, 5243, 5246, 5248 and 5249

How Do I Unlock a User That Has Been Locked Out Due to Numerous Attempts at Entering Their Password?

1. The **Password Device** controls how many incorrect Password attempts you will grant your users on the Web.
 - On the final incorrect attempt your users will see the following message or similar:



- **Once the account is locked**, subsequent login attempts will result in the following message:



2. To unlock a customer's file:

- Follow Steps 1-3 in the **How Do I Update Someone's Web User Name and Password** section.
- De-Select the **User is Locked Out of WebTrac** option.

A screenshot of a web form for updating user information. It has a light gray background. On the left, there are labels: "WebTrac User Name", "New WebTrac Password", "Re-Enter New Password", and a checkbox labeled "User is Locked Out of WebTrac". On the right, there are three input fields: the first contains "JOHN", the second contains masked characters (dots), and the third is empty. The checkbox is currently unchecked.

- Click **Done** or, if the customer wishes to have their Username and Password emailed to them, click **Email User Name and Password to Household**, then click **Done**.