RemoteConnect Support

Operating Instructions

Management Site Administrator's Guide

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1. Introduction

Overview

OPTiM ID is a tool to publish and manage IDs to be used by RemoteConnect Support.

You can operate the tool over the Internet. You do not need to install it on your computer.

Functions

	Function name	Description
1	User Management	Register, edit, and delete user information.
2	User Import	Register and change multiple user information items at the same time by importing a CSV file.
3	User Export	Export user information to a CSV file.
4	Role	Assign the same usage rights by configuring the usage rights of each app function in advance, and then assigning the same role to multiple users.
5	Log View	View the operation log.
6	Environmental Settings	Change the display language and time zone of the management site.
7	Password Management	Change the login password for the management site.

System Requirements

Operating systems	Windows Vista or later
Compatible browser*1	Internet Explorer 8
Network connection	Can connect to the Internet. HTTPS communication (port 443) with the management site is possible directly or via a proxy.
Other	We recommend using the following applications to edit CSV files when you perform user import or export. *2 • Microsoft Excel 2003/2007/2010

*1 For the screen size, we recommend 960 pixels or more for the horizontal resolution.

*2 For details about CSV files, see page 37 "CSV File Import and Export".

How to Read This Manual

1

Symbols

This manual uses the following symbols:

Note

Indicates supplementary relevant information.

[ ]

Indicates the names of the keys that appear on the computer screen.

Disclaimer

To the maximum extent permitted by applicable laws, in no event will the manufacturer be liable for any damages whatsoever arising out of failures of this product, losses of documents or data, or the use or non-use of this product and operation manuals provided with it.

Make sure that you always copy or have backups of important documents or data. Documents or data might be erased due to your operational errors or malfunctions of the machine. Also, you are responsible for taking protective measures against computer viruses, worms, and other harmful software.

In no event will the manufacturer be responsible for any documents created by you using this product or any results from the data executed by you.

Notes

Some illustrations in this manual might be slightly different from the machine.

Contents of this manual are subject to change without prior notice.

Some functions explained in this manual do not work in this product.

Terminology

This section defines the terminology used in this manual.

CSV

This file type contains text data in which items are separated by commas (,), and it can be opened in various types of software.

If this file type is opened in Microsoft Excel, the data separated by commas is displayed in individual cells.

OPTiM ID

Means this service.

URL

The address of a website.

Example: http://www.xxxx.co.jp

Application (app)

The services and software that can be used by OPTiM ID.

Import

Import data created by different software to the software you are using by converting the data to a format compatible with the current software.

OPTiM ID can convert CSV data edited by Microsoft Excel or another spreadsheet program automatically to a format that can be used by OPTiM ID.

Export

Save created data to a file format that can be used by other software.

OPTiM ID can save OPTiM ID data in the CSV file format.

Browser

Software to view the Internet.

(For example, Internet Explorer or Firefox.)

Role

A function to enable configuration of usage rights for OPTiM ID and apps.

Log

Shows management site usage conditions and operation history in OPTiM ID.

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Microsoft® Windows Vista® Ultimate

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Microsoft® Windows Vista® Home Basic

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The proper name of Internet Explorer 8 is Windows® Internet Explorer® 8.

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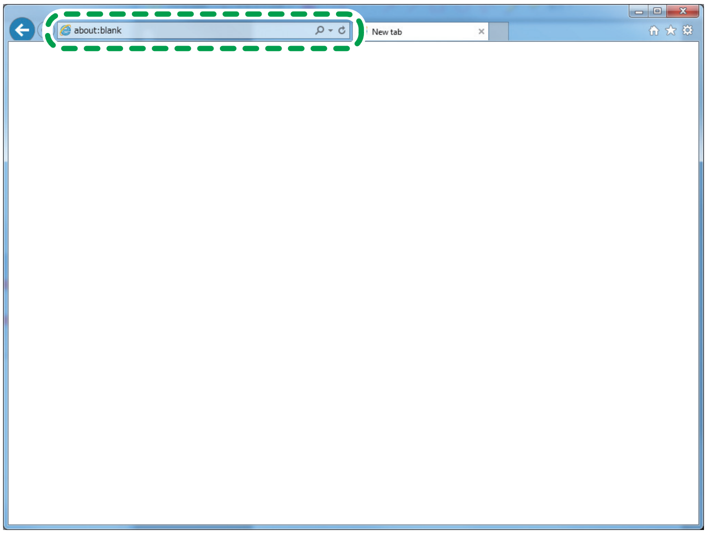
2. Basic Operations of the OPTiM ID Management Site

Logging into the Management Site

You need to log in to use the management site.

1. **Start the browser, enter the URL of the management site in the red box, and then press the [Enter] key.**



DUN501

2. **Enter your user ID or e-mail address and password, and then click [Login].**

   If you want to change the business code, click the button . When clicked, it changes to an entry field.

   Note

   - It is not necessary to enter your user ID or password for 6 hours even if the [Stay logged in] check box is not selected. However, if you log out or close the browser, you must enter the information again.
   - If the [Stay logged in] check box is selected, you do not need to enter your user ID or password at the next login for 14 days. If 14 days pass, you must enter the information again. Furthermore, if you log out once, the automatic login function is no longer available.

3. **The top page is displayed.**

Logging Out of the Management Site

2

1. **Click [Logout].**

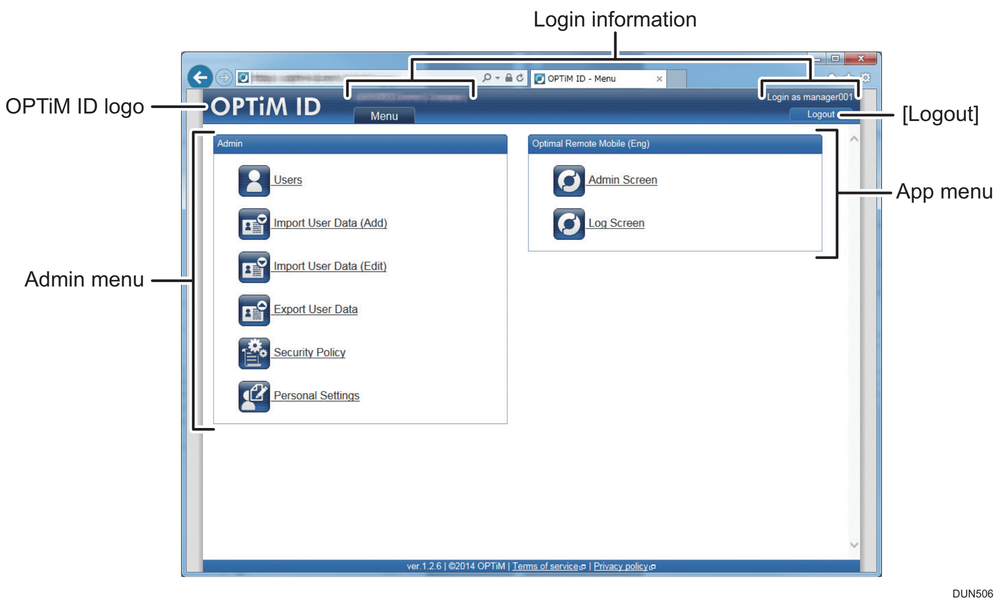
DUN504

Note

- If you log out once, you must enter your user ID or email address and password again, even if [Stay logged in] check box was selected at the login page.

2. **The login screen appears.**

[Menu] Screen Items



OPTiM ID logo

When you click the logo, the screen changes to the [Menu] screen.

Login information

Displays the name and business name of the logged-in user.

[Logout]

Click this button to log out.

Admin menu

The OPTiM ID administration menu.

App menu

Displays the menus of the applications.

3. Creating a Role

With OPTiM ID, you can use the role function to configure operation rights for OPTiM ID management information and apps.

If the same role is configured for multiple users, the same rights are configured for all the users. You do not need to configure rights per user.

You can configure rights simply by selecting a check box.

Checking a Role

Displaying the [Role] screen

1. **Click [Role] on the [Menu] screen.**
2. **The [Role] screen is displayed.**

[Role] Screen Items

In the role list, click the role you want to check.

New

Clicking this icon displays an entry field in the role information section. For details about how to create a new role, see page 14 "Creating a New Role".

Other Operations

Clicking this icon displays the following menu items:

- Select all: Select all role check boxes.
- Clear all: Clear all role check boxes.
- Batch delete: Delete all the selected roles. For details, see page 16 "Deleting Multiple Roles at a Time".

Role list

Displays a list of registered roles.

Role information

Displays the information of the role selected from the role list.

[Edit]

Clicking this icon displays the following menu item:

- Delete: Delete a role

For details, see page 16 "Deleting a Role".

Creating a New Role

Creating New Role Information

1. **Click (Add) icon on the [Role] screen.**

   Note

   - For details about how to display the [Role] screen, see page 13 "Displaying the [Role] screen".

2. **Enter the necessary information, and then click [Save].**

   Note

   - For the entry items, see page 14 "Role Information Items".

3. **The role is registered.**

Role Information Items

The following items are displayed in the [Management] tab in the role information section.

The app names displayed differ by contract content.

Role name

- Enter a role name.
- Enter a role name of 30 characters or less.
- Commas (,) cannot be used.
- Overlapping role names cannot be configured.

All/Individual selection

To enable all functions, select [All]. To configure functions individually, select [Individual], and then select the check boxes of the functions to be enabled.

Editing a Role

To change the role name or configure the usage permission rights of functions, use the following procedure.

1. **In the role list on the [Role] screen, click the icon of the role to be edited. On the [Management Information] screen, click [Edit].**

   Note

   - For details about how to display the [Role] screen, see page 13 "Displaying the [Role] screen".

2. **Edit the necessary information, and then click [Save].**

   Note

   - To discard changes, click [Cancel].
   - For the entry items, see page 14 "Role Information Items".

3. **The role information is changed.**

Deleting Roles

Deleting a Role

1. **In the role list on the [Role] screen, click the icon of the role to be deleted.**

   Note

   - For details about how to display the [Role] screen, see page 13 "Displaying the [Role] screen".

2. **Click [Information], and then click [Delete].**
3. **Click [OK].**
4. **The selected role is deleted.**

Deleting Multiple Roles at a Time

1. **In the role list on the [Role] screen, click the icons of the roles to be deleted.**

   Note

   - For details about how to display the [Role] screen, see page 13 "Displaying the [Role] screen".

2. **Click (Others) icon, and then click [Batch Delete] in the displayed menu.**

   Note

   - The roles of the user currently logged in cannot be deleted, so there are no check boxes for these roles.

3. **Click [OK].**
4. **The selected roles are all deleted.**

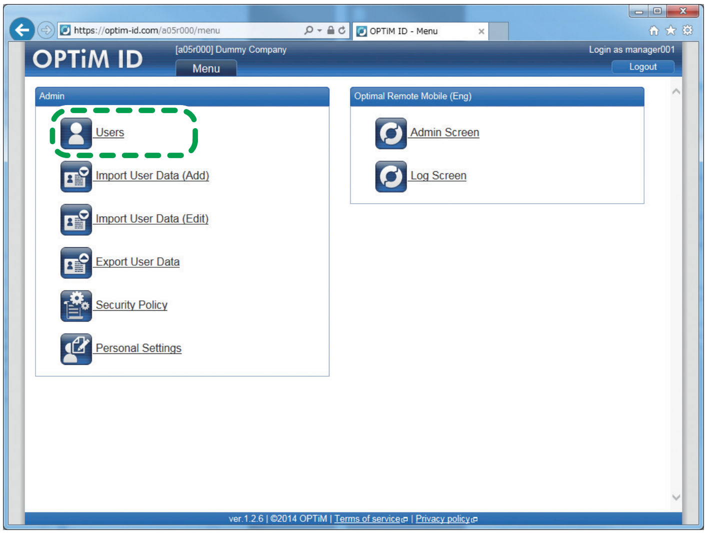
4. Creating Users

You need to create users in advance to configure them on the management.

Checking a User

Displaying the [Users] Screen

1. Click [Users] on the Menu screen.



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2. The [Users] screen appears.

[Users] Screen Items

In the user list, click the user to be checked.

[Search]/[Ascending]

[Search] displays the search items, and [Ascending] shows the items to be sorted.

To search, enter the search keyword into the field below [Ascending], and then click (Search) icon.

Add icon

Clicking the [Add] icon displays an entry field in the user information section. For details about how to create a new user, see page 20 "Creating a New User".

Others icon

Clicking this icon displays the following menu items:

- Select all: Select all user check boxes.
- Clear all: Clear all user check boxes.
- Search target: You can change the search target to user name, e-mail address, or user ID.
- Ascending: Sort the user list in ascending order by user ID, user name, or e-mail address.
- Descending: Sort the user list in descending order by user ID, user name, or e-mail address.
- Batch Delete: Delete all the selected users. For details, see page 25 "Deleting Multiple Users at a Time".

User list

Displays the following information of registered users: user name, search-target user information*, and e-mail address.

* When the search target is user name, nothing is displayed.

User information

Displays the information of the user selected from the user list.

[Edit]

Clicking this icon displays the following menu item:

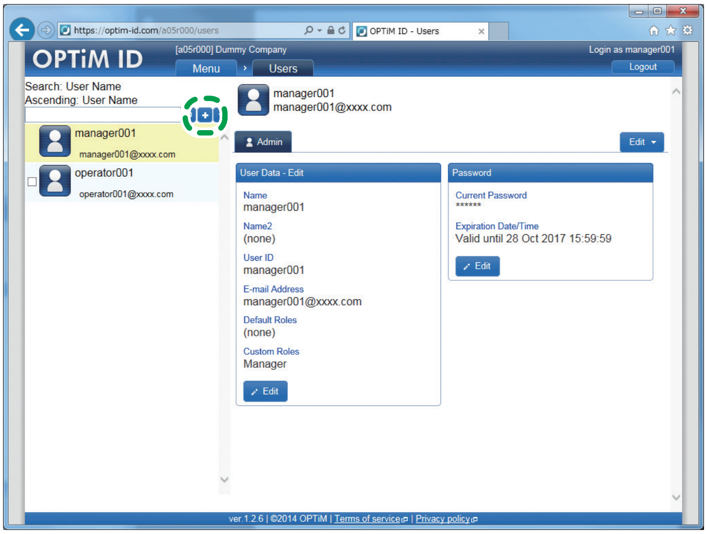
- Delete: Delete the user.

For details, see page 24 "Deleting a User".

Creating a New User

Creating New User Information

1. Click (Add) icon on the [Users] screen.



DUN527

Note

- For details about how to display the [Users] screen, see page 17 "Checking a User".

2. Enter the necessary information, and then click [Save].

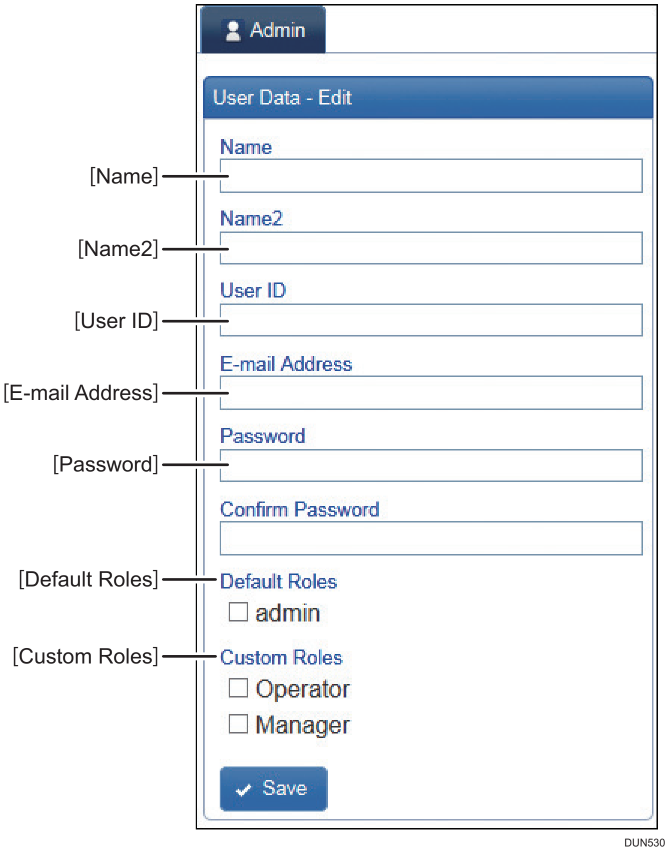
Note

- For the entry items, see page 20 "User Information Items".

3. The user is registered.

User Information Items

The following items are displayed in the [Admin] tab of the [Users] screen.



[Name] *

Enter a name of 30 characters or less.

The following characters cannot be used in the name: "¥", "<", ">", "/", and "&". Overlapping names cannot be configured.

[Name2]

Enter a name of 30 characters or less.

[User ID]

Enter a user ID of 30 characters or less using alphanumeric characters and symbols.

Overlapping user IDs cannot be configured.

[E-mail Address]

Enter an e-mail address of 256 characters or less using alphanumeric characters and symbols.

Overlapping e-mail addresses cannot be configured.

[Password] *

Enter a password of 4 to 20 characters using alphanumeric characters and symbols.

Enter the same item for [Password] and [Confirm Password].

[Default Roles]

Displays the default roles. Select the check box of the role to be configured. The displayed roles can be changed.

admin: Can manage management-site users and roles and view the log.

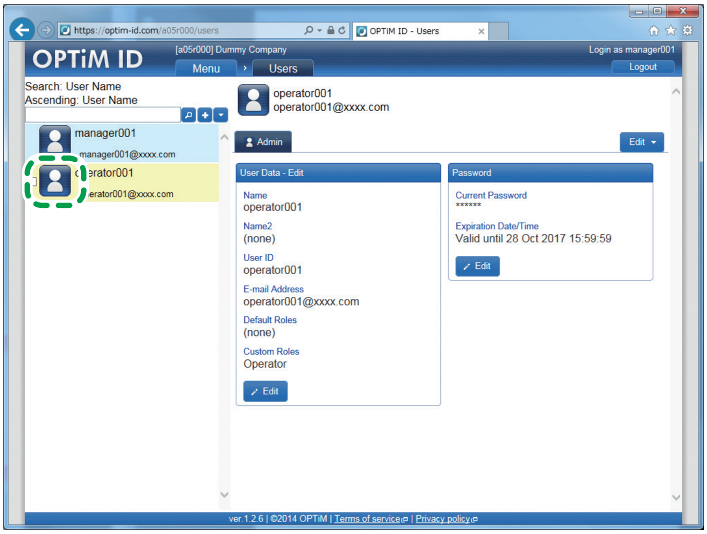
[Custom Roles]

Created roles are displayed. Select the check box of the role to be configured. For details about how to create a role, see page 14 "Creating a New Role".

* Required item

Editing User Information

1. **In the user list on the [Users] screen, click the icon of the user to be edited.**



DUN531

Note

- For details about how to display the [Users] screen, see page 17 "Checking a User".

2. **Click [Edit] under [User Data] or [Password].**
3. **Edit the necessary information, and then click [Save].**

Note

- To discard changes, click [Cancel].
- For the entry items, see page 20 "User Information Items".

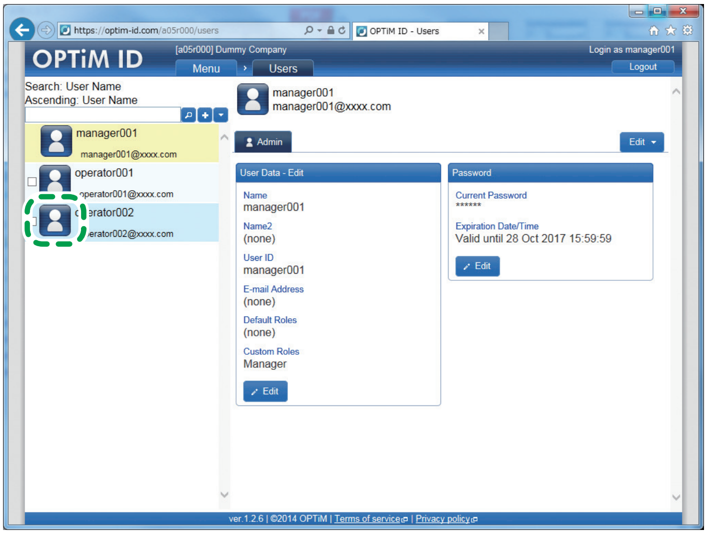
4. **The user information is changed.**

4

Deleting Users

Deleting a User

1. In the user list on the [Users] screen, click the icon of the user to be edited.



DUN534

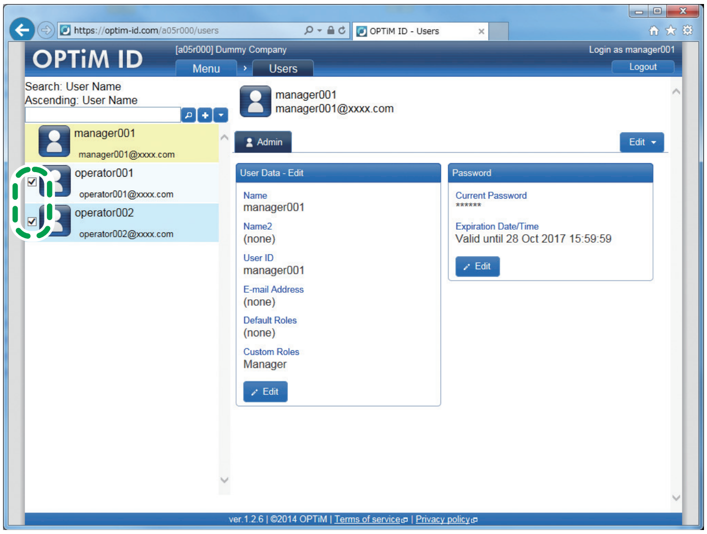
Note

- For details about how to display the [Users] screen, see page 17 "Checking a User".

2. Click [Edit], and then click [Delete] in the operation menu that appears.
3. Click [OK].
4. The selected user is deleted.

Deleting Multiple Users at a Time

1. **In the user list on the [Users] screen, select the check boxes of the users to be deleted.**



DUN537

Note

- For details about how to display the [Users] screen, see page 17 "Checking a User".

2. **Click (Others) icon. In the other operations menu that appears, click [Delete Selected Items].**

Note

- The user currently logged in cannot be deleted, so there is no check box for that user.

3. **Click [OK].**
4. **The selected users are all deleted.**

5. Importing and Exporting Users

You can register new users and edit their information in a batch manner by using the import function.

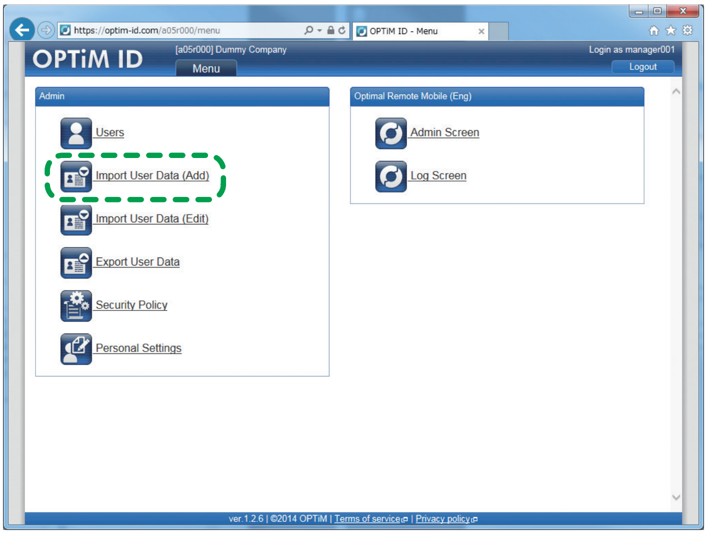
You can export registered user information to a CSV file by using the export function.

Importing

Importing New Data

You can register multiple data items at one time by entering user information in a downloaded CSV file, and then importing it.

1. **Click [Import User Data (Add)] on the [Menu] screen.**



DUN540

2. **Click [Download].**
3. **A dialog box is displayed.**

   Click [Open] or [Save].
4. **Open the file, and then enter user information beginning with the 2nd row.**

   The file is displayed in Microsoft Excel if it is installed.

   After the user information is entered, save the file to where you specify (such as the desktop). While you can change the file name can be changed, select [CSV (comma separated values) (*.csv)] for the file type before saving it.

   Note

   - We recommend using Microsoft Excel 2003/2007/2010 to edit CSV files.

5

- For details about CSV files, see page 37 "CSV File Import and Export".
- For [[M] Role], enter the roles to be configured separated by commas using the role names displayed in the role section on the [Users] screen. Do not enter a space between a comma and a role name following it.
  Example: admin, manager

5. **On the management site, click [Browse]**
6. **Select the saved file, and then click [Open]**
7. **When the name of the selected file is displayed in the blue box click [Upload].**
8. **When a content confirmation screen is displayed click [Import].**

Note

- If there is an error in the content, the error details are displayed in the Notes field. Edit the CSV file, and then upload it again.

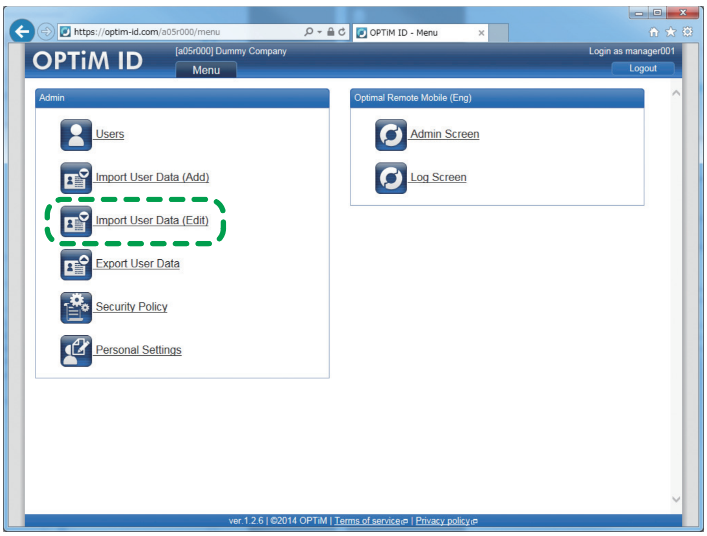
9. **The information is registered.**

5

Importing Edited Data Externally

You can edit registered data items at one time by exporting registered users to a CSV file, editing the information, and then importing it.

1. **Click [Import User Data (Edit)] on the [Menu] screen.**



DUN550

2. **Click [Download].**
3. **A dialog box is displayed.**

   Click [Open] or [Save].

4. **Open the file, and then edit the information.**

   The file is displayed in Microsoft Excel if it is installed.

   After the information is entered, save the file to where you specify (such as the desktop). While you can change the file name, select [CSV (comma separated values) (*.csv)] for the file type before saving it.

   Note

   - We recommend using Microsoft Excel 2003/2007/2010 to edit CSV files.
   - For details about CSV files, see page 37 "CSV File Import and Export".
   - Do not change data in the leftmost column [GUID].
   - Passwords are displayed as strings of asterisks (*) but can be changed.
   - Enter 4 to 20 alphanumeric characters.
   - If 8 asterisks (*) are entered, the password is not changed.
   - For [[M] Role], enter the roles to be configured separated by commas using the role names displayed in the role section on the [Users] screen. Do not enter a space between a comma and a role name following it.
     Example: admin, manager

5. **On the management site, click [Browse].**
6. **Select the saved file, and then click [Open].**
7. **When the name of the selected file is displayed in the blue box click [Upload].**
8. **When a content confirmation screen is displayed click [Import].**

   Note

   - If there is an error in the content, the error details are displayed in the Notes field. Edit the CSV file, and then upload it again.

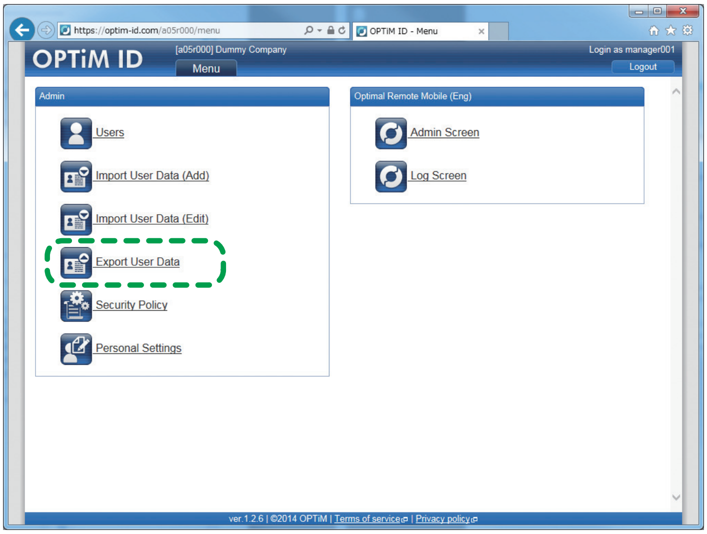
9. **The information is changed.**

5

Exporting

You can export registered user information to a CSV file.

1. **Click [Export User Data] on the [Menu] screen.**



DUN560

2. **Click [Download].**
3. **A dialog box is displayed.**

   Click [Open] or [Save].

Note

- The output file is displayed in Microsoft Excel if it is installed.

6. Checking the Log

You can check the operation log of the management site.

Checking the [Log] Screen

Displaying the [Log] Screen

1. **Click [Log] on the [Menu] screen.**
2. **The [Log] screen is displayed.**

[Log] Screen Items

Search function

You can use the search function to specify the log data to be displayed.

Enter the time data and search keyword, and then click (Search) icon.

If you enter the time data only, all logs from the specified period are displayed.

If you enter a search keyword only, all logs including the keyword are displayed.

[Time data]: You can enter time data (date and time) manually (example: 2011/05/16 01:00), and you can also specify the time by clicking the entry field and selecting from the calendar that appears.

For details, see page 31 "Using the Calendar Screen".

[Search]: Enter the search keyword.

Log

Displays the operation log of the management site.

Using the Calendar Screen

If you click the time data entry field of the search function, a calendar is displayed.

The specified date and time are displayed in the time data entry field.

1. **Clicking this icon displays the calendar of the previous month.**
2. **Click a day to specify the date.**

   The current date and selected date are displayed in light blue and dark blue, respectively. (When the current date is selected, it is not displayed in dark blue.)
3. **Clicking this icon displays the calendar of the next month.**

4. **The specified time is displayed.**
5. **Clicking [Current] specifies the current date and time.**
6. **You can specify the time by moving the sliders. The time moves in increments of 10 minutes.**
7. **Clicking [Close] closes the calendar screen.**

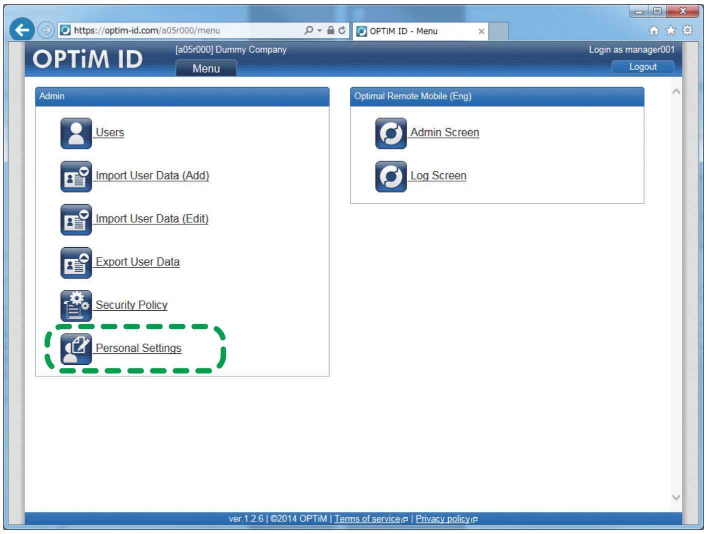
7. Changing Personal Settings

You can change the language and time zone of the management site and the password necessary for you to log in.

Changing Environmental Settings

To change the language and time zone of the management site, use the following procedure

1. **Click [Personal Settings] on the [Menu] screen.**



DUN568

2. **Under [Environmental Settings], click [Edit].**
3. **Select the language and time zone, and then click [Save].**

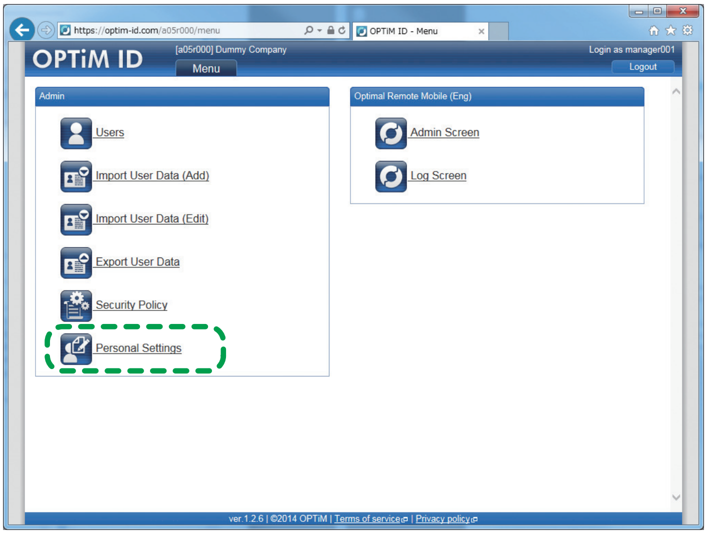
Note

- To discard changes, click [Cancel].

4. **The environmental settings are changed.**

Changing the Login Password

1. Click [Personal Settings] on the [Menu] screen.



DUN572

2. Under [Password], click [Edit].
3. Enter the new password, and then click [Save].

Note

- To discard changes, click [Cancel].

4. The password is changed.

8. Appendix

Frequently Asked Questions

Q1

I cannot open the management site.

A1

1. Are you connected to the Internet?

   To use the management site, you need to be connected to the Internet.

   Check whether your computer is connected to the Internet.

2. Does your computer satisfy the system requirements?

   For the OPTiM ID system requirements, see page 5 "System Requirements".

Q2

I selected the [Stay logged in] check box, but automatic login does not start

A2

Automatic login is effective for 14 days from when the [Stay logged in] check box is selected. If 14 days pass, you must enter the information again. Furthermore, if you log out once, the automatic login function is no longer available. Enter your user ID or e-mail address and password again to log in.

Q3

I cannot edit the role of [admin].

A3

You cannot edit the role of [admin] because it is specified by default.

Q4

The content displayed in the menu differs from user to user.

A4

The menu displayed differs by the rights (roles) assigned to the user.

Ask an appropriate person with user/role management rights.

Q5

What is the column [GUID] in the CSV file of [Import User Data (Edit)] ?

A5

This is the ID unique to each user used by OPTiM ID system.

As user information changes during import based on GUID, do not change this data.

If you change GUID data accidentally, another user's information may be erroneously changed.

Q6

How do I check the current login password?

A6

It is not possible to check the current login password. Set a new password from the [Users] screen. For details, see page 23 "Editing User Information".

Q7

I tried to import user data, but there was a read error.

A7

If you edit a CSV file using Notepad in Windows, a read error occurs. Use software compatible with the CSV format, and edit files using Microsoft Excel 2003/2007/2010. For details about CSV files, see page 37 "CSV File Import and Export".

CSV File Import and Export

Format

A CSV file is made up of multiple records. Records are separated by line feed codes.

A record is made up of multiple fields. Fields are separated by commas (%x2C).

There are two types of fields: escaped fields and non-escaped fields.

When double quotes (%x22), commas (%x2C), CRs (%x0D), or LFs (%x0A) are to be included, surround the entire character string with double quotes to escape it.

When double quotes (%x22) are included, convert them to consecutive double quotes (%x22%x22), and then escape the field.

RFC4180 defines the CSV formats that can be imported.

Examples

GUID,[F]name, [F]user ID,[F]e-mail address,[F]password,[M]role

user1,user 1,user 1,user1,user1@example,********,role1

user2,user 2,user 2,user2,user2@example,********,role2

When escaped fields are included

GUID,[F]name, [F]user ID,[F]e-mail address,[F]password,[M]role

user1,user 1,user 1,user1,user1@example,********,"role1,role2"

user2,user 2,user 2,user2,user2@example,********,"role1,role2"

Character Codes

Language environments: UTF-8

Newline Characters

Newline characters are line feeds (LF) during export.

LFs and CR+LFs are supported during import, but only one character type must be used.

MEMO

MEMO

MEMO