



# Passport Site - Admin Guide

Edition 2.2

## **About This Guide**

The Delta Controls Passport Site provides access to various Services available to our Partners such as George Support, George University, the Helpdesk and various others. Based on the Services a user has access to, they may be provided resources such as Marketing Materials, Product Information, Software Downloads and others.

This Guide provides the information that designated Passport Partner Admins require, to provide access for your employees and customers to Delta Controls Passport and to manage their accounts.

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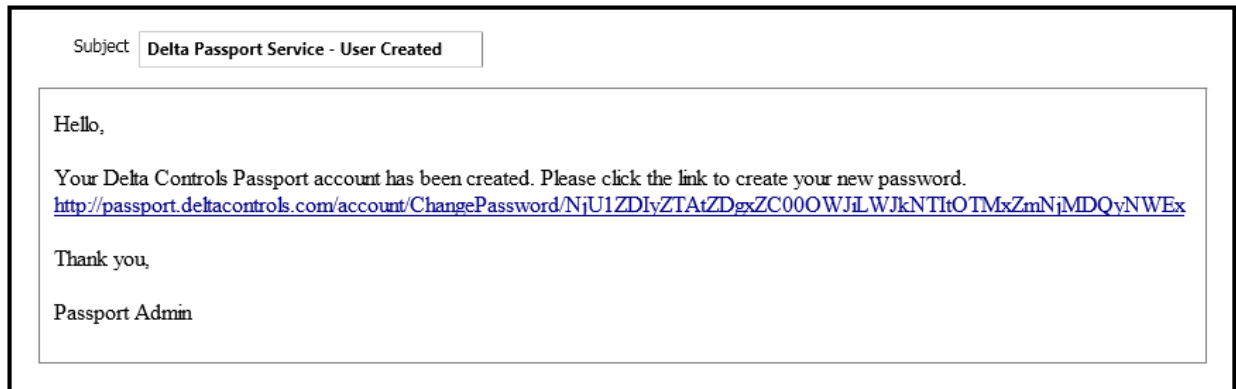
# Accessing Delta Controls Passport

## Browser

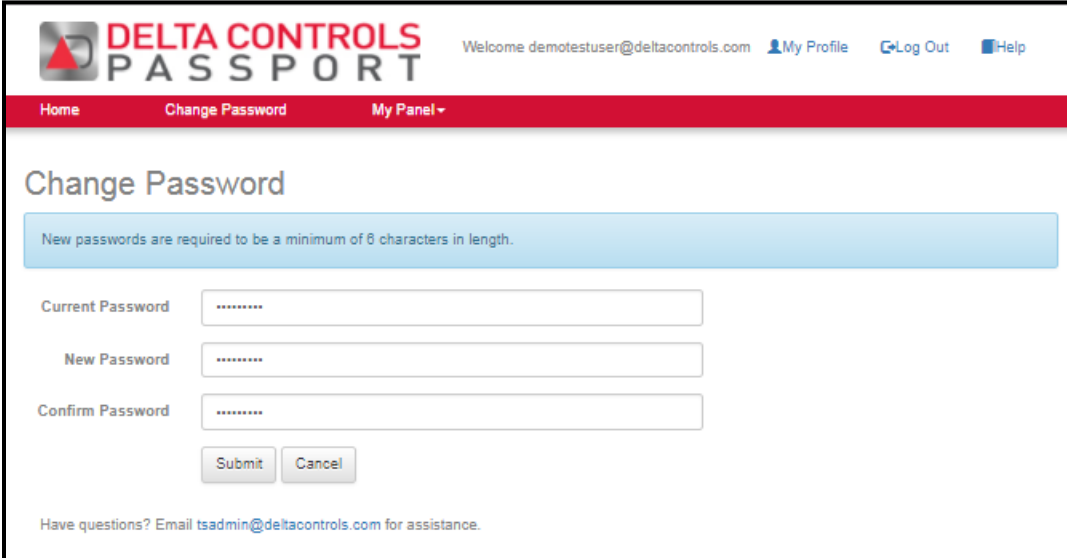
The recommended browser for using the **Passport Site** is **Chrome**.

## Initial Logon to Passport

When a Passport User profile is created by an administrator, an email will be sent advising this user that a Passport account has been created along with a link to create a new password.



1. Click on the link within the email body. The **Delta Controls Passport Change Password** page will display.



**DELTA CONTROLS**  
**PASSPORT**

Welcome demotestuser@deltacontrols.com [My Profile](#) [Log Out](#) [Help](#)

Home **Change Password** My Panel ▾

### Change Password

New passwords are required to be a minimum of 6 characters in length.

Current Password

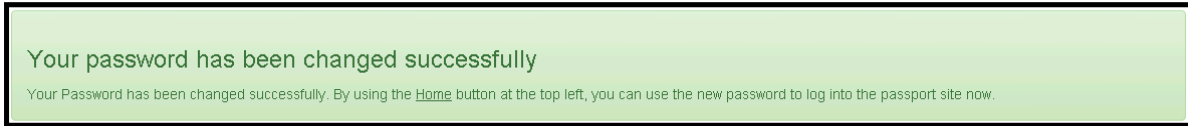
New Password

Confirm Password

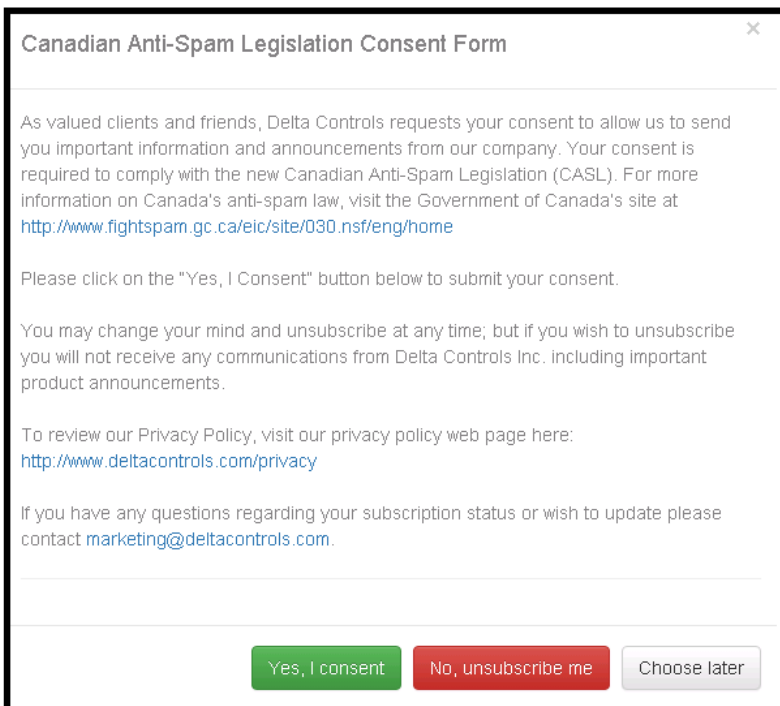
Have questions? Email [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com) for assistance.

2. Complete the new password details and click **Submit**.

3. A **password change confirmation** will be displayed. When the password has successfully been changed, a **Canadian Anti-Span Legislation Consent (CASL)** will be displayed.



4. The CASL Consent Form will be displayed. The options are:
  - a. Yes, I consent
  - b. No, unsubscribe me
  - c. Choose later



5. After a selection is made, the **My Profile Page** is displayed.

## CASL Consent

When you consent to CASL, the Passport **My Profile** Page is displayed with the **Preferred Communications** tab displayed. The **My Profile** page provides you with the ability to update your **Preferred Communications** options, **Basic Information** and to **Manage Your Password**. In addition, you can view **Your Administrators** details. The following sections describe the information you will see and the details that may be updated.

## My Profile

### Preferred Communications

In this tab you can define the following;

- Opt for Email Notification, there are seven Preferred Communications choices (can choose more than one) specific to your needs.

The screenshot shows the 'My Profile' page in the Delta Controls Passport system. At the top, there is a navigation bar with 'Home', 'Change Password', and 'My Panel' options. The main content area is titled 'My Profile' and includes a 'Back to Home' button. Below this, there are tabs for 'Preferred Communications', 'Basic Information', 'Your Administrators', and 'Change Password'. A blue informational box states: 'Product news, training opportunities, and company and event announcements are just a few of the things we can share with you. But we don't want to overwhelm you with emails. Please use the list below to select the types of emails you'd like to receive.' The 'Preferred Communications' section features a dropdown menu for 'Receive emails from Delta Controls' set to 'Yes'. Below this is a list of seven communication types, each with a checked checkbox: Product News, Sales & Marketing Tools, Company News, Technical Newsletters, Training, Events, and Cyber Security News. A 'Save' button is located at the bottom of this section. At the very bottom of the page, a footer note reads: 'Have questions? Email tsadmin@deltaccontrols.com for assistance.'

## Basic Information

In this tab you can update the following fields:

- First Name
- Last Name
- Job Title

The screenshot shows the 'My Profile' page in the Delta Controls Passport system. The page has a red navigation bar with 'Home', 'Change Password', and 'My Panel' options. Below the navigation bar, there's a 'My Profile' section with a 'Back to Home' button. The profile is divided into four tabs: 'Preferred Communications', 'Basic Information', 'Your Administrators', and 'Change Password'. The 'Basic Information' tab is active, showing a form with the following fields:

Email	demotestuser@deltacontrols.com	Location	
User Level	Partner	Country	
First Name	<input type="text" value="Demo"/>	Create Date	30/10/2015 10:03:06 AM
Last Name	<input type="text" value="Test"/>	Created By	
Job Title	<input type="text" value="Fill Me"/>	Last Change Date	30/10/2015 10:36:07 AM
Company	DEMO PARTNER US	Last Updated By	
Partner	DEMO PARTNER US	Expiry Date	

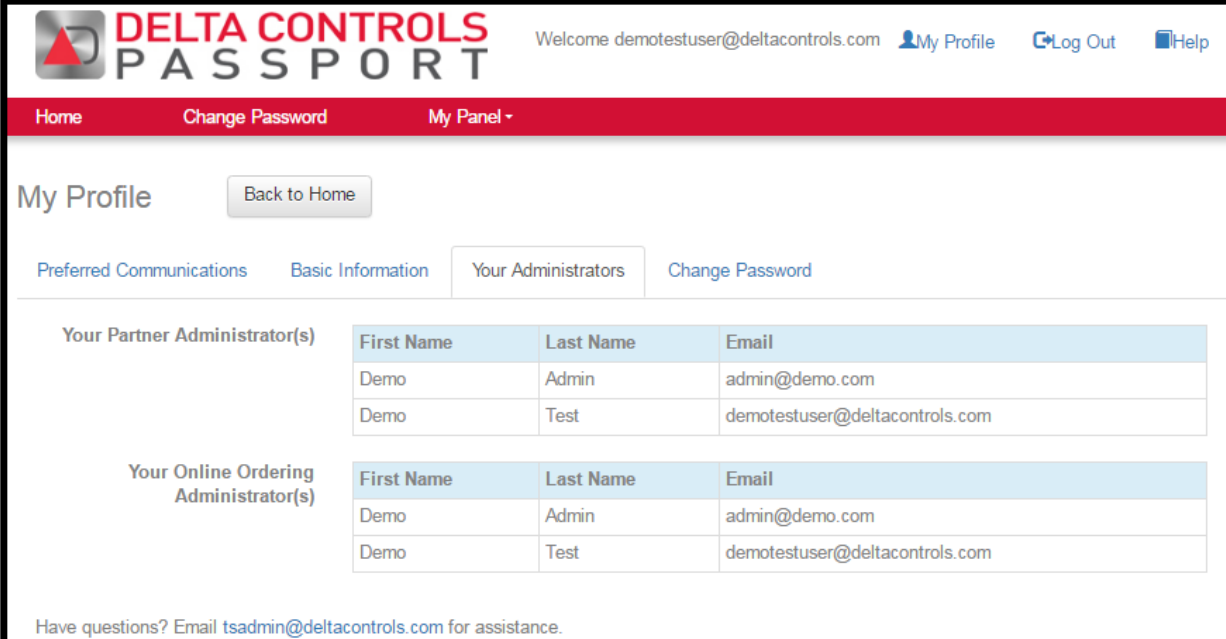
At the bottom of the form is a 'Save' button. Below the form, there is a note: 'Have questions? Email [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com) for assistance.'

## Your Administrators

The First Name, Last Name and Email address for each of your **Partner Administrators** and **Online Ordering Administrator(s)** will be displayed in this tab.

To request additional Partner or Online Ordering Administrators for your organization, send an email request to: [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com). The Administrators will be setup within 2 business days and you will receive a notification.

**Note:** there is no limit to the number of Passport or Online Ordering Administrators that may be setup.



**DELTA CONTROLS PASSPORT** Welcome demotestuser@deltacontrols.com [My Profile](#) [Log Out](#) [Help](#)

Home Change Password My Panel ▾

My Profile [Back to Home](#)

Preferred Communications Basic Information **Your Administrators** Change Password

Your Partner Administrator(s)

First Name	Last Name	Email
Demo	Admin	admin@demo.com
Demo	Test	demotestuser@deltacontrols.com

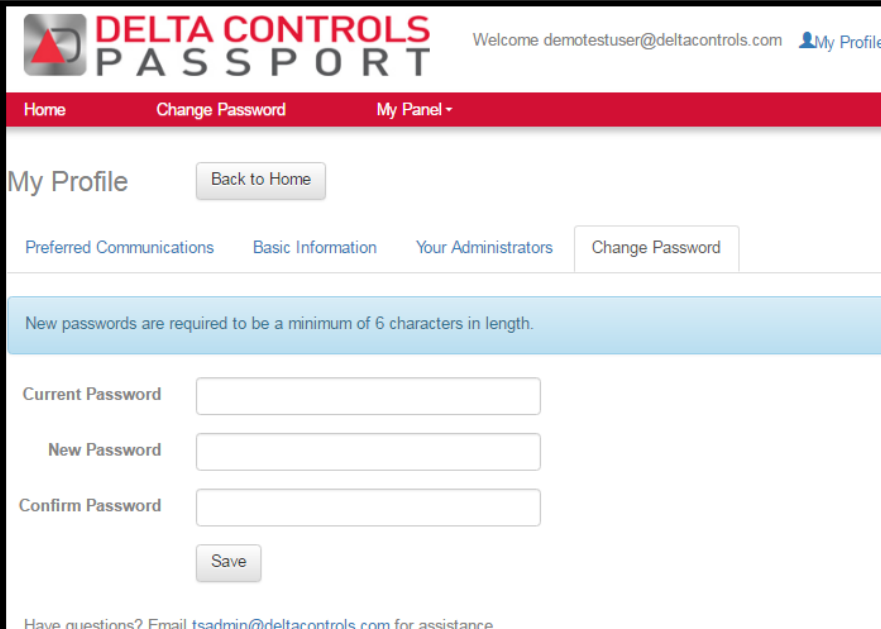
Your Online Ordering Administrator(s)

First Name	Last Name	Email
Demo	Admin	admin@demo.com
Demo	Test	demotestuser@deltacontrols.com

Have questions? Email [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com) for assistance.

## Change Password

In this tab you may update your password.



**DELTA CONTROLS PASSPORT** Welcome demotestuser@deltacontrols.com [My Profile](#)

Home Change Password My Panel ▾

My Profile [Back to Home](#)

Preferred Communications Basic Information Your Administrators **Change Password**

New passwords are required to be a minimum of 6 characters in length.

Current Password

New Password

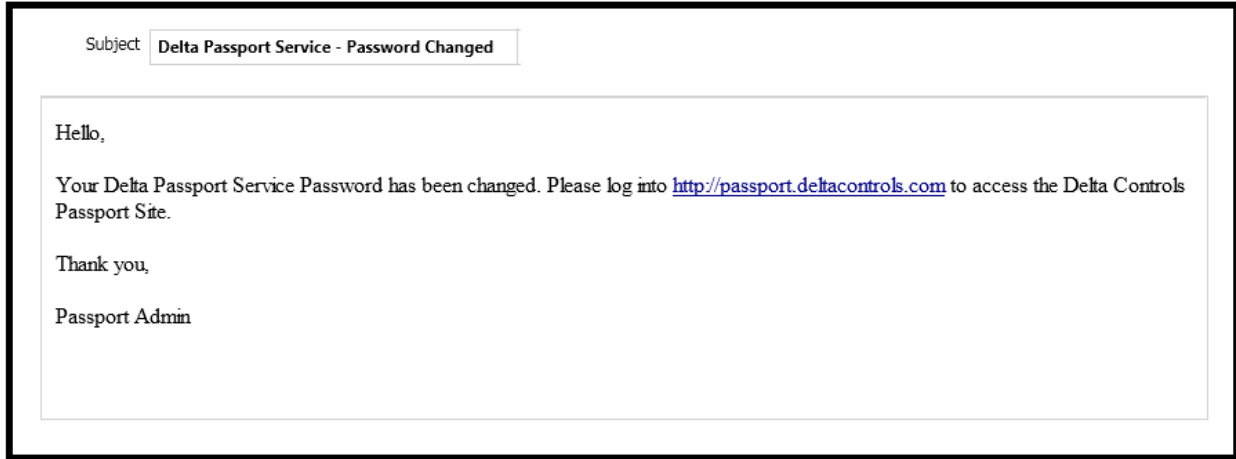
Confirm Password

[Save](#)

Have questions? Email [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com) for assistance.

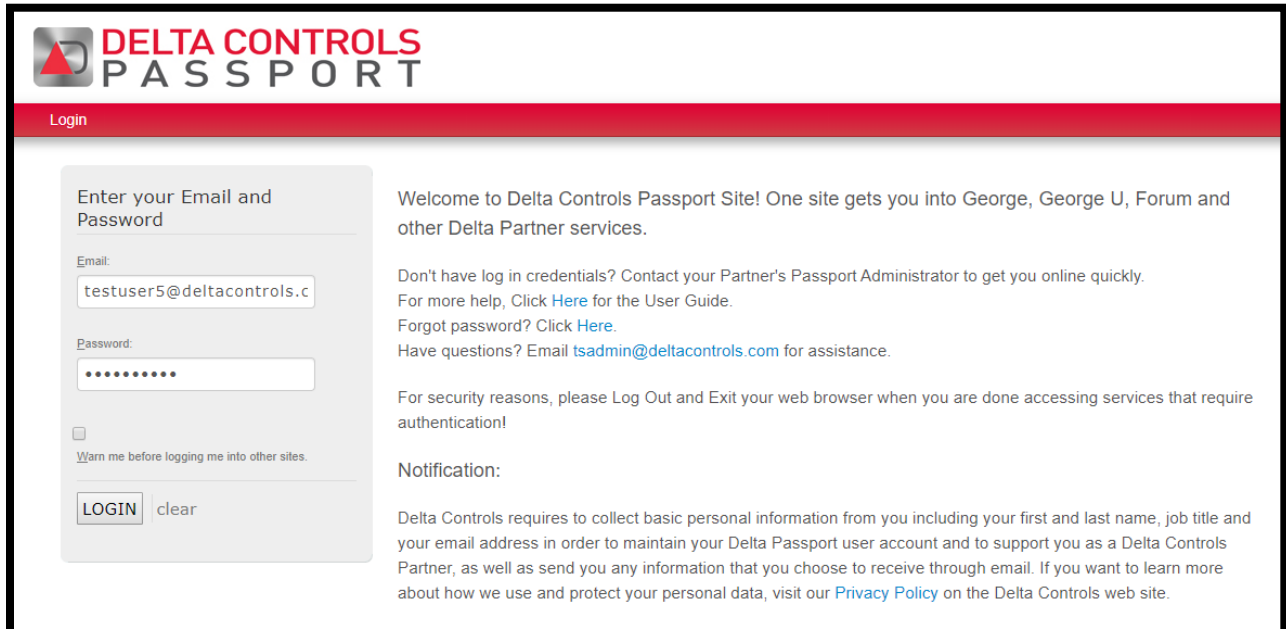


A **confirmation email** will be sent with the following details.



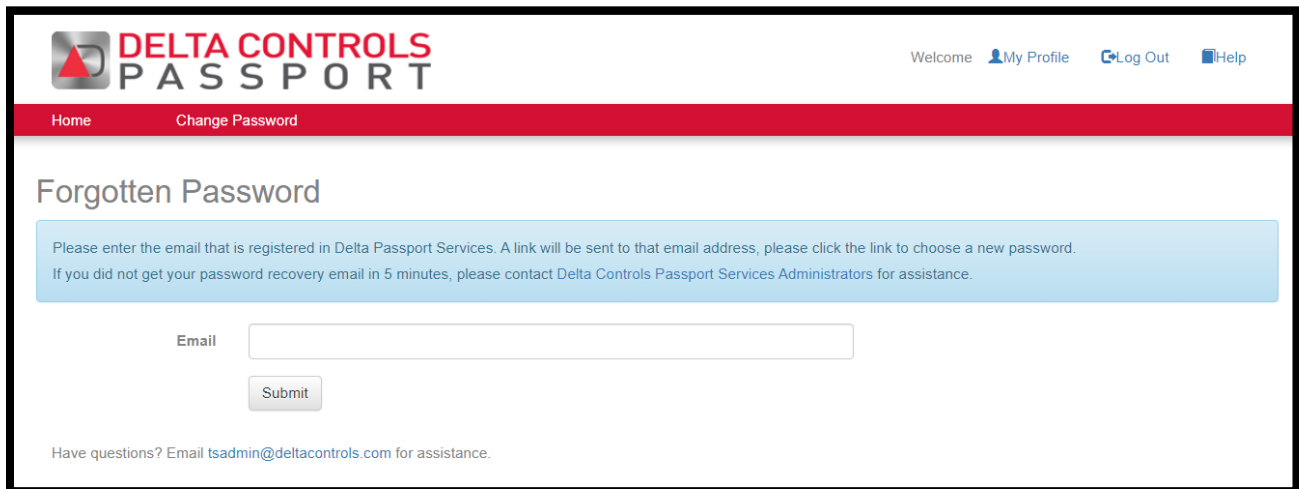
## Logon to Passport

1. Use the following URL to access the Passport Site: <http://passport.deltacontrols.com>.
2. From the logon page the following options are available:
  - a. Email for questions
  - b. Request Password Reset
  - c. Link to this User Guide



## Password Reset

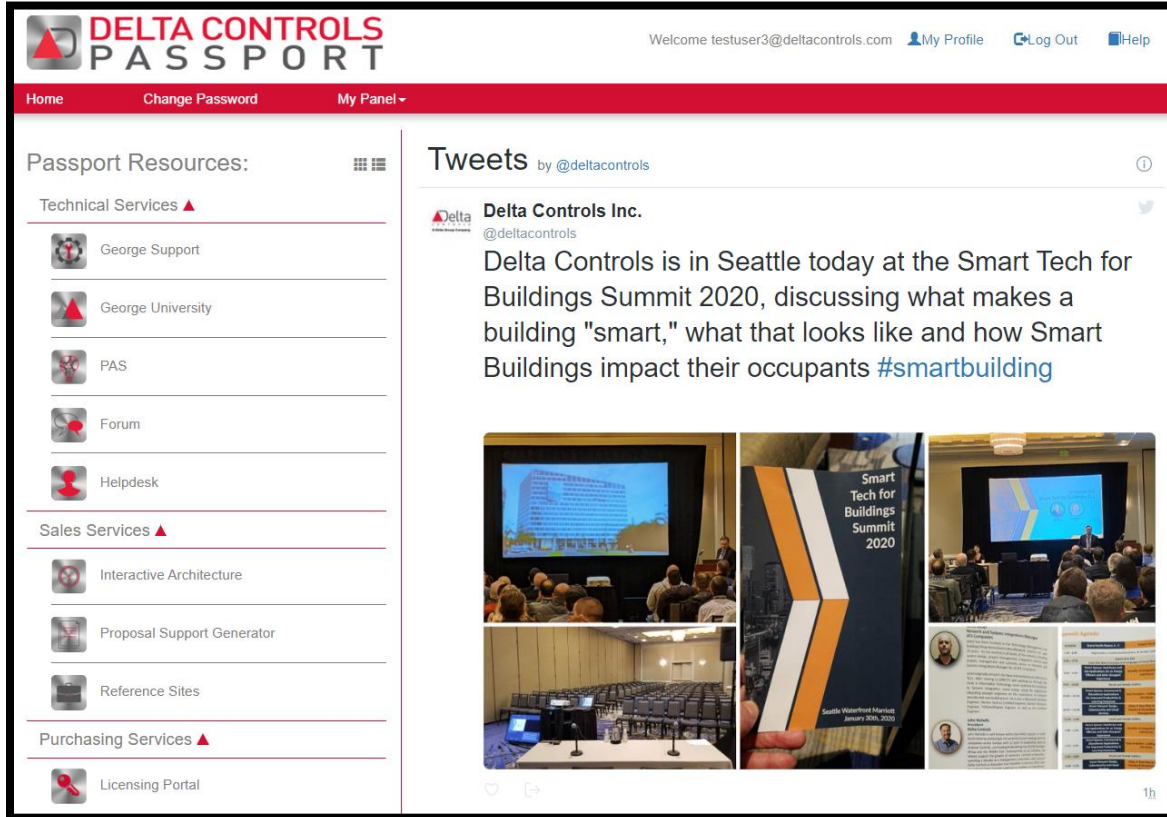
1. From the logon page, click on **Forgot password? Click [Here](#)**.
2. A **Change Password** page will display.
3. Enter your **Email** address and click **Submit**.
4. An email will be sent with a link to reset your password.



The screenshot shows the 'Forgotten Password' page in the Delta Controls Passport system. At the top left is the 'DELTA CONTROLS PASSPORT' logo. At the top right are navigation links: 'Welcome', 'My Profile', 'Log Out', and 'Help'. Below the logo is a red navigation bar with 'Home' and 'Change Password' links. The main heading is 'Forgotten Password'. A light blue box contains instructions: 'Please enter the email that is registered in Delta Passport Services. A link will be sent to that email address, please click the link to choose a new password. If you did not get your password recovery email in 5 minutes, please contact Delta Controls Passport Services Administrators for assistance.' Below this is an 'Email' label, a text input field, and a 'Submit' button. At the bottom, there is a link: 'Have questions? Email [tsadmin@deltaccontrols.com](mailto:tsadmin@deltaccontrols.com) for assistance.'

# Passport Functionality

When logged into Passport, the following functionality may be accessed.



## Functional Overview

Feature	Description
Home	Click to return to the site Main page.
Change Password	Displays the Change Password page.
My Panel	Provides the ability to Manage User Profiles and the Partner Account details. Ability to view your employees Online and Classroom training grades.
My Profile	Displays the details of your Profile and provides the ability to <b>Edit</b> details.
Log Out	Click to Log Out of the Passport Site.
Help	Click to display this User Guide.
Passport Resources	Will provide links to additional Resources you have access to. Questions regarding the Passport Resources you have access to should be directed to your Partner or Delta Controls Technical Services Admin.

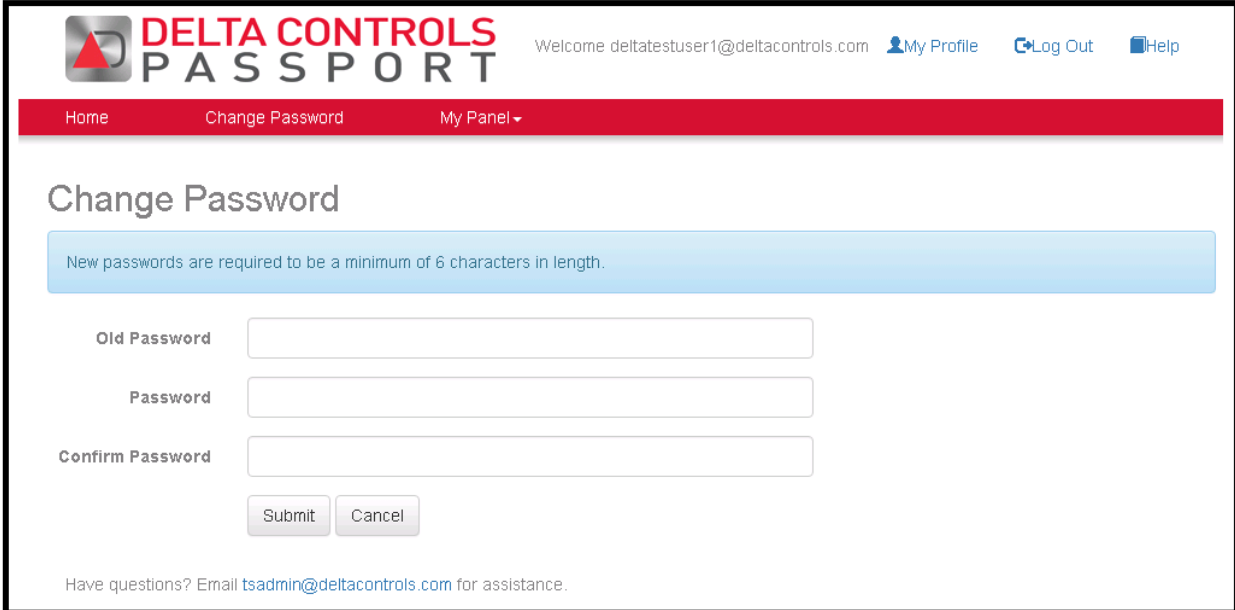
Feature	Description
<b>Please Note:</b> Partner Resources are defined according to your Delta Controls Agreement, and the approval of Delta Technical Services. Any questions regarding the Passport Resources assigned to you, please contact TS Admin. (tsadmin@deltaccontrols.com)	
News	This section of the Main Page provides features published by Delta Controls.

## Change Password



A Password must be a minimum of 6 characters in length and is case sensitive.

1. Click on the link to **Change Password**. The Change Password page will display.
2. Enter the following details and click **Submit**.
  - a. Old Password
  - b. Password
  - c. Confirm Password
3. Click **Cancel** to discontinue changing the password. The Main Passport page will be redisplayed.



The screenshot shows the 'Change Password' page in the Delta Controls Passport system. At the top, there is a navigation bar with 'Home', 'Change Password', and 'My Panel' (with a dropdown arrow). The page title is 'Change Password'. A blue message box states: 'New passwords are required to be a minimum of 6 characters in length.' Below this, there are three input fields labeled 'Old Password', 'Password', and 'Confirm Password'. At the bottom of the form are 'Submit' and 'Cancel' buttons. A footer note says: 'Have questions? Email tsadmin@deltaccontrols.com for assistance.'

## My Profile



Details for your **Partner Administrator(s)** may be found on the **My Profile** page.

The My Profile page displays **Details** about your **Delta Controls Passport account**.

1. To **View/Edit** your profile, click on **My Profile** in the header of the Main Page.
2. Your Profile details in four tabs will be displayed.

DELTA CONTROLS  
PASSPORT

Welcome testuserfull@deltaccontrols.com [My Profile](#) [Log Out](#) [Help](#)

Home Change Password My Panel

My Profile [Back to Home](#)

Preferred Communications Basic Information Your Administrators Change Password

Product news, training opportunities, and company and event announcements are just a few of the things we can share with you. But we don't want to overwhelm you with emails. Please use the list below to select the types of emails you'd like to receive.

Receive emails from Delta Controls

Preferred Communications

- Product News
- Sales & Marketing Tools
- Company News
- Technical Newsletters
- Training
- Events
- Cyber Security News

[Save](#)

Have questions? Email [tsadmin@deltaccontrols.com](mailto:tsadmin@deltaccontrols.com) for assistance.

## Edit My Profile

1. When your Profile has been displayed it can be **Edited**.
2. The fields available for Edit will become active. The following fields may be changed.
  - a. First Name
  - b. Last Name
  - c. Job Title
  - d. Opt For Email Notification
  - e. Preferred Communications
3. Click
4. **Save Note:** if for any reason your email address must be changed, please contact your TS Administrator ([tsadmin@deltaccontrols.com](mailto:tsadmin@deltaccontrols.com))

## Manage My Account

From **My Panel**, your **Main Account**, **Child Accounts** and **Location** details can be managed. Your employees **Online Grades** and **Classroom Training Grades** can be viewed on this dropdown.

1. From **My Panel**, click **Manage My Account**.

### Partner Account

1. For the Partner Account, the only field that may be updated is the PayPal Account information.
2. The following fields are read-only.
  - a. Partner ID
  - b. Account Name
  - c. Country

### Child Accounts

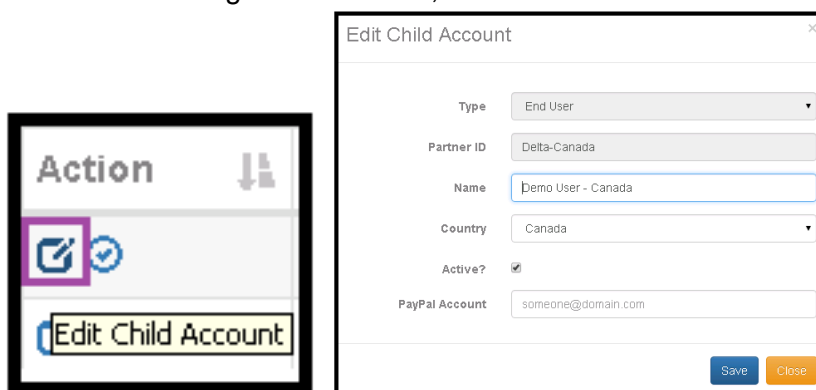
Child Accounts are accounts set up for your **Customers** and **Sub dealers**.

#### Create a New Child Account

Please refer to **Creating a New Child Account** on page 23 of this document.

#### Edit an Existing Child Account

1. To Edit an Existing Child Account, click **Edit Child Account** icon in the account.



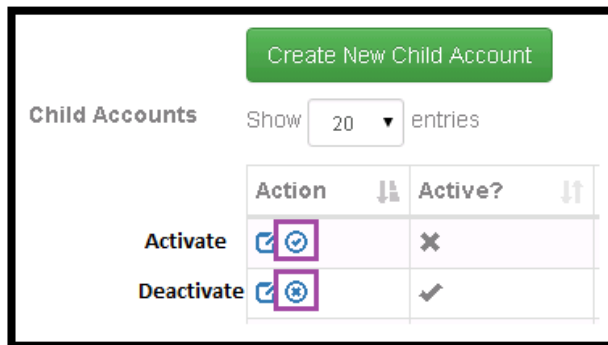
Field	Description
Type	This field is read-only. Chosen when new customer/Sub-dealer is created.
Partner ID	This field is read-only.

## Passport Functionality

Field	Description
Name	The Child Account name may be edited.
Country	Select the Country for the account.
Active	Click the checkbox to Activate or Deactivate the child account.
PayPal Account	Enter the email for the Company PayPal account.
Save	Click to update the child account. A confirmation dialog box is displayed, click <b>OK</b> .
Close	Click to exit the window without changing the detail.

### Activate / Deactivate an Existing Child Account

1. To **Activate** or **Deactivate** the Child Account from the **Account List**, click on the icon in the **Action** column. Please refer to the following screen shot.



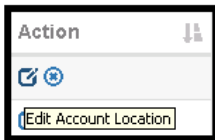
## Account Locations

### Create a New Account Location

Please refer to the **Working with Existing User Records** on page 21 of this document.

### Edit an Existing Account Location

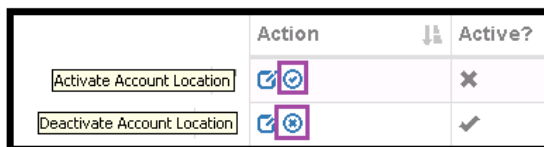
1. To Edit an Existing Account Location, click on **My Panel** dropdown, **Manage My Account**
2. Under Account Locations, click on the **Edit Account Location** icon in the list.



Field	Description
For Account	The Company can be updated using the drop down menu
Location	The Location name may be updated.  <b>Please note:</b> Editing a location is specific to the location, do not change the name to reflect a different location. Create a new location and deactivate the existing location.
Country	Change the Country for the Location.
Active?	Check for Activate or uncheck to Deactivate the account location
Save	Click to update the child account location. A confirmation dialog box is displayed, click <b>OK</b> .
Close	Click to exit the window without changing the detail.

### Activate / Deactivate an Account Location

1. To **Activate** or **Deactivate** an Account Location from the **Account List**, click on the icon in the **Action** column. Please refer to the following screen shot.



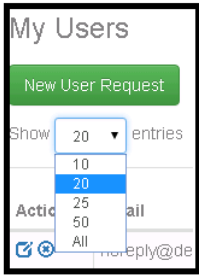




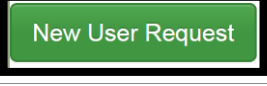
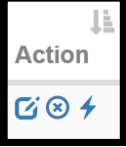


## User Management

From **My Panel**, Existing User Profiles may be managed i.e. updated, disabled, enabled etc. In addition **New Users** may be created. Your employees Online Grades and Classroom Grades can be viewed and exported to an excel spreadsheet.

### User Interface

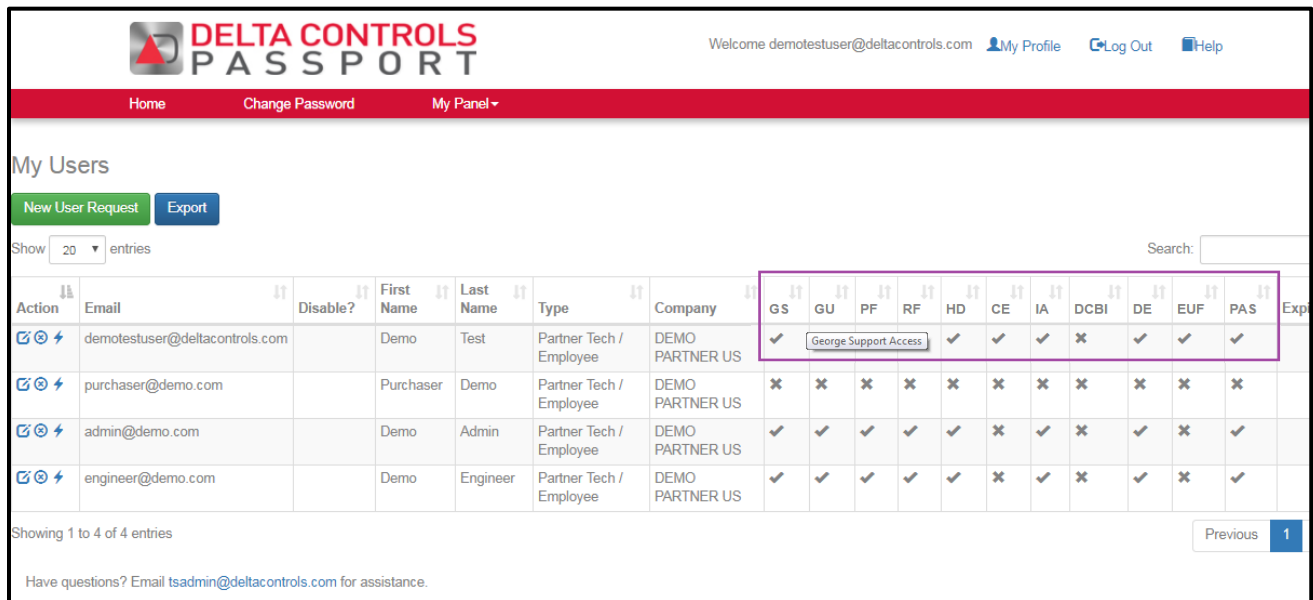
The following options exist to manage the data you work with in this view.

Feature		Description
Show Entries		Provides the option of selecting the number of user records to display in the list.  Specific to <b>My Users</b> .
Data Sorting		For each column in User List you can click on the <b>Sort</b> icon to sort the data in ascending or descending order. The icon will change based on the sort order selected.
Search		Provides the ability to search the My Users List on the following criteria: <ul style="list-style-type: none"> <li>• Email address</li> <li>• First Name</li> <li>• Last Name</li> <li>• Partner Number</li> <li>• Company Name</li> </ul> <p><b>Please note:</b> this search feature is case sensitive. Multiple criteria can be searched by separating criteria with a space.</p>
Page View		Allows you to scroll through the pages of user records.
Export		Will create an Excel Spreadsheet from the list shown on screen.
New User Request		To request new users
Action		See table below for a detailed description

## My Users

1. To access existing user records, click on **My Panel** and then **My Users**.
2. The **Export** button will re-create the viewable list as an Excel Spreadsheet.
3. The **User List** will be displayed. The following sections describe specific elements within the **User List**.

**Note:** for **Access Type** descriptions you can hover your cursor over the Access Type.



DELTA CONTROLS  
PASSPORT

Welcome demotestuser@deltacontrols.com [My Profile](#) [Log Out](#) [Help](#)

Home Change Password My Panel

### My Users

[New User Request](#) [Export](#)

Show 20 entries Search:

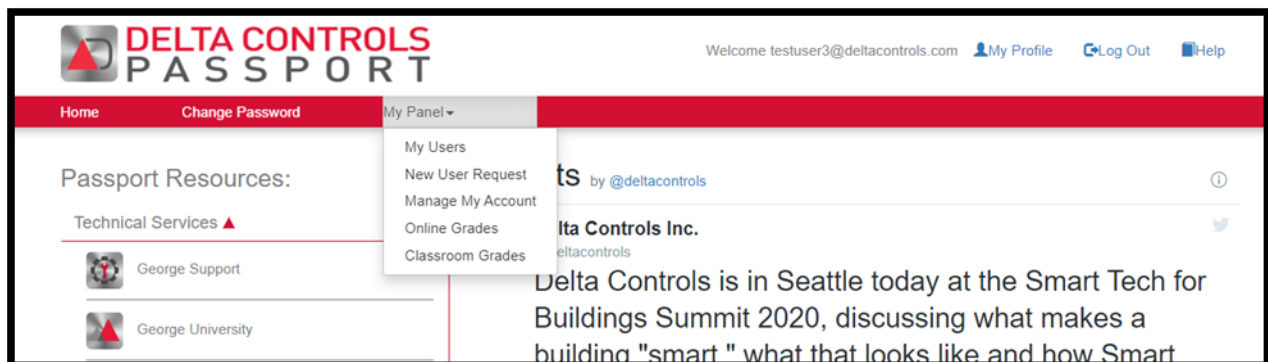
Action	Email	Disable?	First Name	Last Name	Type	Company	GS	GU	PF	RF	HD	CE	IA	DCBI	DE	EUF	PAS	Exp
<a href="#">✉</a> <a href="#">⚡</a>	demotestuser@deltacontrols.com		Demo	Test	Partner Tech / Employee	DEMO PARTNER US	✓	George Support Access	✓	✓	✓	✓	✓	✗	✓	✓	✓	
<a href="#">✉</a> <a href="#">⚡</a>	purchaser@demo.com		Purchaser	Demo	Partner Tech / Employee	DEMO PARTNER US	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	
<a href="#">✉</a> <a href="#">⚡</a>	admin@demo.com		Demo	Admin	Partner Tech / Employee	DEMO PARTNER US	✓	✓	✓	✓	✓	✗	✓	✗	✓	✗	✓	
<a href="#">✉</a> <a href="#">⚡</a>	engineer@demo.com		Demo	Engineer	Partner Tech / Employee	DEMO PARTNER US	✓	✓	✓	✓	✓	✗	✓	✗	✓	✗	✓	

Showing 1 to 4 of 4 entries [Previous](#) [1](#)

Have questions? Email [tsadmin@deltacontrols.com](mailto:tsadmin@deltacontrols.com) for assistance.

## Online Grades and Classroom Grades

1. To access employee's training records, click on **My Panel** and then **Online Grades** or **Classroom Grades**.
2. The **Export** button will re-create the viewable lists as an Excel Spreadsheet.



DELTA CONTROLS  
PASSPORT

Welcome testuser3@deltacontrols.com [My Profile](#) [Log Out](#) [Help](#)

Home Change Password My Panel

Passport Resources:

Technical Services ▲

[George Support](#)

[George University](#)

My Panel

- My Users
- New User Request
- Manage My Account
- Online Grades
- Classroom Grades

ts by @deltacontrols



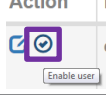
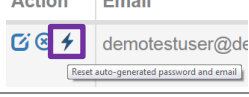
Delta Controls Inc. @deltacontrols

Delta Controls is in Seattle today at the Smart Tech for Buildings Summit 2020, discussing what makes a building "smart" what that looks like and how Smart

## User Management

### User Profile Details

This section describes the details that exist in the **User List** that are exclusive of the **Access Types**. Refer to the **Access Types** section for a description of this data.

Column Heading		Description
Action	Edit User	 <p>Provides the ability to <b>Edit</b> an existing User Record.</p>
Action	Disable User	 <p>Provides the ability to <b>Disable</b> an <b>Enabled</b> User.</p>
	Enable User	 <p>Provides the ability to <b>Enable</b> a <b>Disabled</b> User.</p>
	Password Generator	 <p>Provides the ability to <b>email</b> a new auto-generated <b>password</b> to User. If user is disabled, this feature is removed.</p>
Email		Email address for the user which is the username to access the Passport Site and also for email notifications.
Disable?		Shows nothing is enabled or a checkmark if user is disabled.
First Name		First Name for the Passport User.
Last Name		Last Name for the Passport User.
Type		<p>Describes the User Type for the user. The types are:</p> <ul style="list-style-type: none"> <li>• Partner Tech / Employee</li> <li>• Sub Dealer</li> <li>• Basic End User</li> <li>• Advanced End User</li> </ul>
Company		Company for the Passport User.
Access Types		Refer to the Access Types section of this document.
Expiry?		<p>The Expiry Date for the following user types may be set to any period of time within one year from creation date.</p> <ul style="list-style-type: none"> <li>• Sub Dealer</li> <li>• Basic End User</li> <li>• Advanced End User</li> </ul> <p>The <b>Expiry Date</b> may be extended at any time by <b>Editing</b> the user record or clicking on the flag will extend the date by 90 days.</p>

## Access Types

Column Heading	Description	User Profile Section	User Type	Selection
GS	George Support Access	Delta Services	Partner Sub Dealer Basic End User Advanced End User	George Support
GU	George University Access	Delta Services	Partner Sub Dealer Basic End User Advanced End User	George University
PF	Partner Forum Access	Delta Services	Partner	Forum
RF	Reference Site Access	Delta Services	Partner	Reference Sites
HD	Help Desk Access	Delta Services	Partner	Helpdesk
CE	Cloud Engineering Access	Additional Groups	Partner	Cloud Engineering (Billed)
IA	Interactive Architecture Access	Delta Services	Partner	Interactive Architecture
DCBI	Delta Controls Business Institute Access	Additional Groups	Partner	DCBI (Billed)
PAS	Professional Application Service Access	Delta Services	Partner	PAS
Constant Contact	Account - Owner Account - User	Delta Services	Partner	Constant Contact
PSG	Proposal Support Generator	Delta Services	Partner	PSG

## Working with Existing User Records

For User Records that exist in Passport, the following options are available when **Editing** a record.

The screenshot displays the 'Edit My User' interface in the Delta Controls Passport system. The page header includes the logo, user name 'testuser3@deltacontrols.com', and navigation links for 'My Profile', 'Log Out', and 'Help'. A red navigation bar contains 'Home', 'Change Password', and 'My Panel -'. The main content area is divided into two columns. The left column contains a form for user details, including fields for 'User Level' (Partner), 'PartnerId' (Delta-Demo), 'Email' (madeupemail@deltacontrols.com), 'First Name' (Made up test), 'Last Name' (Test User), 'Job Title' (test), 'Company' (Delta Controls Demo Users), 'Location', 'Country' (Canada), and notification preferences. The right column lists 'Delta Services' such as 'George Support', 'George University', and 'Interactive Architecture', along with 'Access Permissions' like 'Marketing Material and Information' and 'Product Information'. At the bottom, there are 'Update' and 'Back to List' buttons, and a footer note: 'Have questions? Email tsadmin@deltacontrols.com for assistance.'

Field	Options/Note	Description
User Level	Partner Sub Dealer Basic End User Advanced End User	A user record will have a defined User Type. The User Type for this record cannot be changed.
Partner ID		The Partner ID represents the Company the user works for. Based on the type of Company the user works for, the Partner ID may be a Delta Partner, a Partner Sub Dealer or End User.
Email	Cannot be edited.	The email address represents the username for accessing Delta Controls Passport and also the email in which the user will be contacted by, if Delta is authorized to do so.
Disabled?		Set this check-box to <b>Disable</b> the user.
First Name		First Name of the user.
Last Name		Last Name of the user.
Job title		Job Title for the user.
Company		Company Name associated with the user.
Location		An existing Location for the company may be added.
Create New Location		This function may be used to Create a New Location for the account listed in the Partner ID field. A <b>Location</b> is a Branch Office owned or operated by a Partner.
Country		The Country associated with the Company.
Opt for Email Notification.		Information and Announcement emails from Delta Controls.  <b>Please Note:</b> system generated emails specific to the use of Passport such as, email notifications regarding Password Changes are exempt from this selection.
Delta Services	Any combination of Delta Services may be selected for the user.  <b>Please note:</b> Delta Services are specific to User Type i.e. a Sub Dealer user may only be granted access to Forum, George Support or George University, for example. The options are dynamically displayed when a new user is created and the user type selected.	
	<b>Delta Service</b>	<b>Applicable User Type(s)</b>
	Interactive Architecture	Partner
	Reference Sites	Partner
	Forum	Partner Sub Dealer
	George Support	Partner Sub Dealer

## User Management

Field	Options/Note	Description	
		Basic End User Advanced End User	
	George University	Partner Sub Dealer Basic End User Advanced End User	
	PAS	Partner	
	Helpdesk	Partner	
	Proposal Support Generator	Partner	
	Constant Contact	Partner	
	Cloud Engineering	Partner Sub Dealer	
Functional Areas	Type of communications user would like to receive	Management/Principals	Accounting
		Lead Administration	Purchasing
		Sales Lead	RMA
		Technical Lead	Sales
		Technical	Principals

## Additional Functionality

Within the **Edit User** function **Child Accounts** and **New Locations** may also be created. **Child Accounts** are accounts set up for your customers and sub dealers. **Locations** are branch offices owned or operated by a Partner. eg "Vancouver, BC" which is suggested to be "City, State/Province"

## Additional Functionality

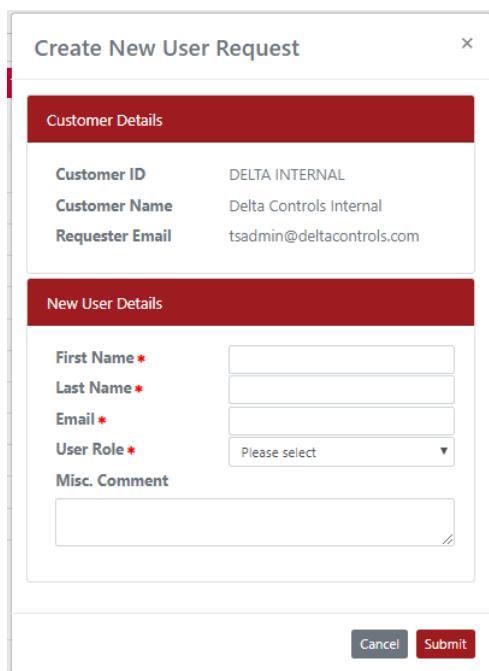
### Online Ordering

Your designated Online Ordering Partner Admin.(s) can be found under “My Profile” “Your Administrators”

Only they can request access to online ordering. This cannot be achieved by updating an employee’s Passport User account.

If you are listed as one of the designated Online Ordering Partner Admins. you can achieve this request directly through the Online Ordering site.

*Under "Administration" choose "Customer Management" then choose "Maintain Personnel" choose "Create New User Request" ; fill out the form and Submit. See image below.*



**Create New User Request** [X]

**Customer Details**

Customer ID	DELTA INTERNAL
Customer Name	Delta Controls Internal
Requester Email	tsadmin@deltacontrols.com

**New User Details**

First Name \*

Last Name \*

Email \*

User Role \*

Misc. Comment

Cancel Submit



## User Management

### Creating a New Child Account

To **Create a New Child Account** from within the **Edit User** feature, perform the following steps. In this example, an **End User account** will be created.

1. Click **Create New Child Account**.

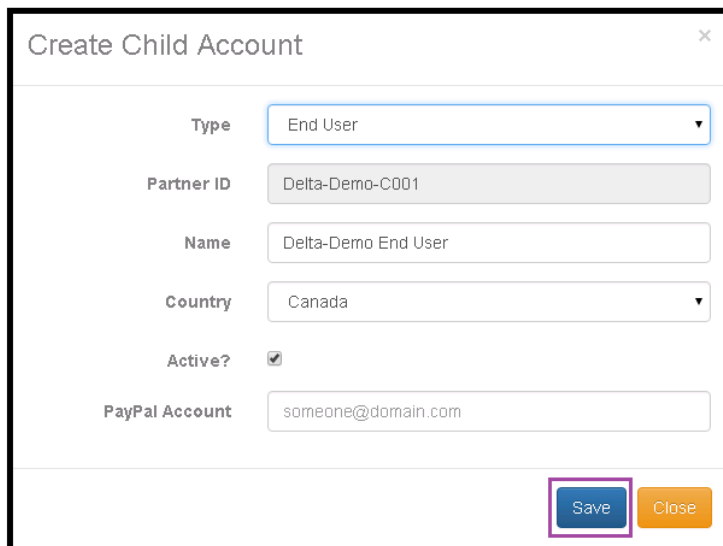
In this example the following **Partner Account** is used: **Delta-Demo (Delta Controls Demo Users)**. A Create Child Account window is displayed.

2. Select the **Type of Child Account**: Sub Dealer or End User.

When Sub Dealer is chosen the Partner ID: Delta-Demo-S001, will numerically increase for next Sub Dealer.

When End User is chosen the Partner ID: Delta-Demo-C001, will numerically increase for next End User.

3. Enter a (Company) **Name** for the Account. In this example the **Name** will be **Delta-Demo End User**.
4. Select a **Country** for the account from the drop-down list.
5. **Active?** the **Status** of the Account. Auto set to **Active**. The Child Account may be activated at a later date when the Active setting is not selected at the time of creation.
6. **PayPal Account**. Enter the **email address** of the Company Paypal account. (optional)
7. Click **Save** to create the child account or **Close** to cancel the action.
8. An Account Creation confirmation dialog will display, click **OK**.



The screenshot shows a 'Create Child Account' dialog box with the following fields and values:

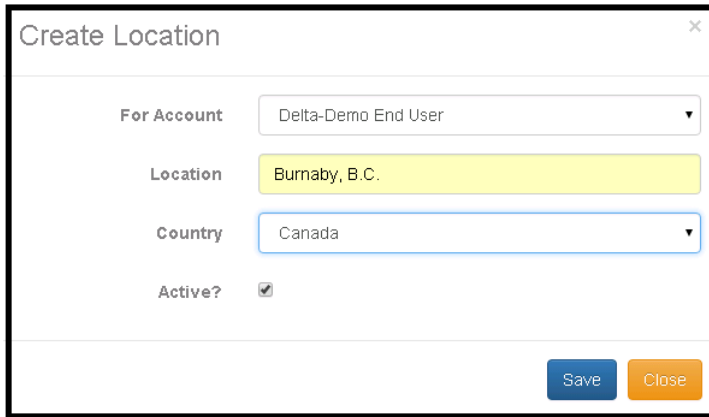
- Type: End User
- Partner ID: Delta-Demo-C001
- Name: Delta-Demo End User
- Country: Canada
- Active?:
- PayPal Account: someone@domain.com

Buttons: Save (blue), Close (orange). The Save button is highlighted with a red box.

### Creating a New Location

A Location may be created for any Accounts you have access to. To **Create a New Location** from within the Edit User feature, perform the following steps. In this example, a Location (Burnaby, B.C.) will be created for the End User account (Delta-Demo End User) created in the previous example.

1. Click **Create New Location**.
2. In the **For Account** drop-down list, select an account and for this example, **Delta-Demo End User** will be selected.
3. For **Location**, enter the Location information. ie. City, Province/State
4. Select the **Country** for this Location from the drop-down list.
5. **Active?** Set the **Status** of the Location. Auto set to **Active**. The Location may be activated at a later date when the Active setting is not selected at the time of creation and unchecked.
6. Click **Save** to create the location or **Close** to cancel the action.
7. A **Location Creation** confirmation dialog will display, click **OK**.



### Delta Services/Additional Groups

Delta Services and Additional Groups settings are based on user type and define access to different Sites. Following describes the Delta Services and Additional Groups that may be associated with a user. **Please Note:** when a new user is created, all available Delta Services are selected by default based on the user type.

Delta Service / Additional Group	User Type	Name	Description
Delta Service	Partner	Interactive Architecture	To win the sale, your customer needs to understand everything you can offer them. Interactive Architecture has been created to address this need and is an engaging sales tool to provide context and demonstrate our products in a totally new way.
	Partner	Reference Sites	Demonstrate to a potential client what Delta Controls products will do the job. Visit our Reference Sites and search through a list of

## User Management

<b>Delta Service / Additional Group</b>	<b>User Type</b>	<b>Name</b>	<b>Description</b>
			projects from around the world that you can use to show Delta Controls has the right product for the job.
	Partner Sub Dealer	Partner Forum	Forum is available to communicate with Delta support staff and other Delta Controls Partners.
	Partner Sub Dealer Basic End User Advanced End User	George Support	Delta's Support pages contain the collective knowledge of decades of product development. Whether you're looking for information on the latest products, KbAs, catalog sheets, software updates, or trying to find the dimensions of a 20-year-old controller, George Support has the answers you need.
	Partner Sub Dealer Basic End User Advanced End User	George University	George University is our online learning tool. George U courses are available for Partners and technical end users who want to know more about how to use Delta products. This online learning environment covers network architecture, GCL programming and much more.
	Partner	Professional Application Service	PAS can help with projects, as an extra resource or for custom development.
	Partner	Helpdesk	Help Desk is a web interface to the Delta controls case management system. Enter a support call, manage active cases and view a past history for yourself and your company.
	Partner	Proposal Support Generator	Proposal Support Site is designed to give you quick and easy access to the most up-to-date resources for your proposal documents.
Additional Group	Partner	Constant Contact - Account Owner - Account User	Constant Contact is our Email Service that provides customizable e-mail templates to support your e-mail marketing.
	Partner	DCBI (Billed)	The DCBI provides specially designed leadership and sales training to Delta Partners. Get industry specific training for Branch Managers, Sales people, and business leaders.

Delta Service / Additional Group	User Type	Name	Description
	Partner	Cloud Engineering (Billed)	Want to build, program and test a network of controllers before having to invest thousands of dollars in hardware? This tool will provide you with the ability to create a virtual network of hundreds of controllers on demand. Set it up, program it, test it, link graphics and when you're ready, export it to your real site to save you hours of time in the field.

### Access Permissions

Access Permissions are displayed on the page and are informational. Permissions are granted based on user type.

User Type	Access Permissions
Partner	<div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px;"> <p><b>Access Permissions</b></p> <ul style="list-style-type: none"> <li>✓ Marketing Material and Information</li> <li>✓ Product Information</li> <li>✓ Beta Product Info</li> <li>✓ Release Notes</li> <li>✓ RMA General Information</li> <li>✓ Sales tools</li> <li>✓ Support General Information</li> <li>✓ Product Downloads</li> <li>✓ "How to" Videos</li> <li>✓ KBA Database</li> <li>✓ Archived Newsletters</li> <li>✓ Program References</li> <li>✓ Training Info and Overview</li> <li>✓ Webinars</li> </ul> </div>

# User Management

User Type	Access Permissions
Sub Dealer	<div data-bbox="716 264 1263 600" style="border: 1px solid #ccc; background-color: #e1f5fe; padding: 10px;"> <p><b>Access Permissions</b></p> <ul style="list-style-type: none"> <li>✓ Marketing Material and Information</li> <li>✓ Product Information</li> <li>✓ Support General Information</li> <li>✓ Product Downloads</li> <li>✓ "How to" Videos</li> <li>✓ KBA Database</li> <li>✓ Program References</li> <li>✓ Training Info and Overview</li> </ul> </div> <div data-bbox="716 632 1263 867" style="border: 1px solid #ccc; background-color: #e1f5fe; padding: 10px; margin-top: 10px;"> <p><b>Optional Support Permissions</b></p> <p><i>(Caution. These areas may contain sensitive product info that was intended for Partners only.)</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Webinars</li> <li><input type="checkbox"/> Release Notes</li> </ul> </div>
Advanced End User	<div data-bbox="716 888 1279 1207" style="border: 1px solid #ccc; background-color: #e1f5fe; padding: 10px;"> <p><b>Access Permissions</b></p> <ul style="list-style-type: none"> <li>✓ Marketing Material and Information</li> <li>✓ Product Information</li> <li>✓ Support General Information</li> <li>✓ Product Downloads</li> <li>✓ "How to" Videos</li> <li>✓ Program References</li> <li>✓ Training Info and Overview</li> </ul> </div> <div data-bbox="716 1241 1279 1423" style="border: 1px solid #ccc; background-color: #fff9c4; padding: 10px; margin-top: 10px;"> <p>Disclaimer: An advanced user will be able to download software, firmware and programs. Please make sure you want to continue with this option.</p> </div>
Basic End User	<div data-bbox="716 1444 1300 1703" style="border: 1px solid #ccc; background-color: #e1f5fe; padding: 10px;"> <p><b>Access Permissions</b></p> <ul style="list-style-type: none"> <li>✓ Marketing Material and Information</li> <li>✓ Product Information</li> <li>✓ Support General Information</li> <li>✓ "How to" Videos</li> <li>✓ Training Info and Overview</li> </ul> </div>

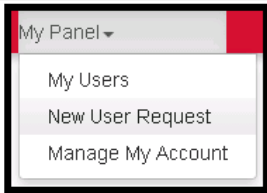

### Functional Areas

Functional areas describe the business role of the user. A selection of one functional area is required, and all that may apply may be selected. The Functional Areas are as follows:

Functional Areas	
Management/Principals	Accounting
Technical	Purchasing
Lead Administration	RMA
Sales Lead	Sales
Technical Lead	Principals

## Creating a New User

A New User may be created from **My Panel** or from **My Users**.

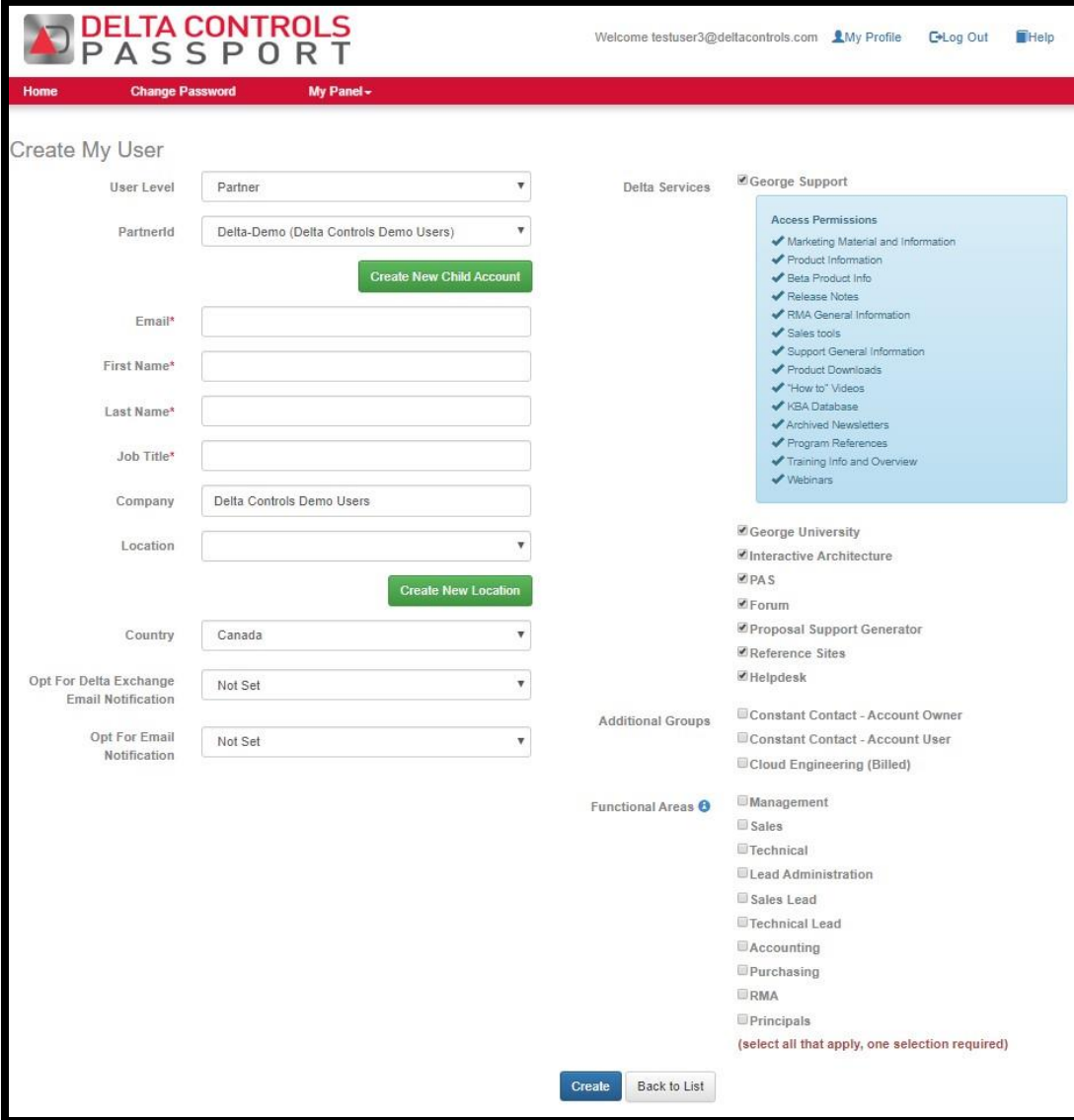
My Panel	
My Users	

1. Click on **New User Request**. The **Create My User** page will be displayed.
2. Enter the following details.
3. When complete, click **Create** to create the user record or click **Back to List** to abandon the user creation process.

Field	Value
User Level	Select one of the following: <ul style="list-style-type: none"> <li>• Partner</li> <li>• Sub Dealer</li> <li>• Basic End User</li> <li>• Advanced End User</li> </ul>
Partner ID	Based on the user type, one company or a selection of companies may be displayed. Select one. If Sub Dealer or End User Company isn't listed, change User Level back to "Partner" and click on Create a New Child Account.

## User Management

Field	Value
Create New Child Account	Create a New Child Account if necessary, only visible when User Level is "Partner"
Email	Enter the email address of the user.
First Name	Enter the First Name of the user.
Last Name	Enter the Last Name of the user.
Job Title	Enter the Job Title of the User.
Company	Based on the selection in the Partner ID field, the company name will be displayed
Location	Select a Location and if a new location is required, click on Create New Location. A Location is not required.
Country	Select a Country from the list, should default to what the Partner ID has set.
Delta Services	Make a selection from the available Services. A Service selection is not required. Any number of available services may be selected by default of User Level.
Additional Groups	Make a selection from the available Groups. A Group selection is not required. Any number of available Groups may be selected.
Functional Areas	For users listed under User Level as "Partner", <b>a minimum of one selection is required</b> . All functional areas that may apply can be selected. <b>Note:</b> choosing "Purchasing" does not implement access to Online Ordering.



NOTE: Please be advised that Opt For Delta Exchange Email Notification no longer exists, this field will be removed in the next update of Passport. You can disregard this and leave it at “Not Set”.

### Additional Information

User Type	Function	Additional Information
Partner Tech/Employee	Email Address Domain	The Email address must have the same <b>domain</b> as the Admin creating the user i.e. Admin with @deltacontrols.com can only create a user with an email domain of @deltacontrols.com.



## User Management

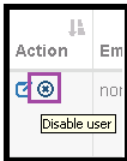
User Type	Function	Additional Information
Partner Tech/Employee	Delta Services	All of the available Delta Services are selected by default. These Services will be available immediately with the exception of George Support which will take one hour to be active. Please refer to the section of the document entitled <b>Delta Services/Additional Groups</b> for a list of Delta Services available by user type.
Partner Tech/Employee	Functional Areas	By setting Functional Areas the user will receive information pertaining to the selections made. i.e. When Technical is selected, the user will receive information from the Technical Services Department. When Accounting or Purchasing are selected, the user will receive information from the Ordering Department.
Sub Dealer	Expiry Date	By default, the Expiry Date is set to expire in one years' time from the day the user record is created. An expiry date may not be set to a period of time longer than one year from today's date.
Basic End User Advanced End User	Expiry Date	By Default, the Expiry Date is set to expire within 90 days from the day the user record is created. The expiry date may be extended but cannot be set to a period of time longer than one year from today's date.

## Disable an Enabled User

A user record may be disabled from either the “My Users” List or when Editing a user record.

### “My Users” List

1. To **Disable** a user record from the user list
2. Click on My Users under the My Panel dropdown menu, find the user to disable. In the **Action** column, Click on the **Disable User** icon.



3. A confirmation dialog box is displayed, click **OK**.
4. From the **User List**, the disabled user will have a check mark in the **Disable?** Column of the detail line.



### Edit My User

1. To **Disable** a user record from the **Edit My User** view.
2. Locate the user in the My Users list. Click on the **Edit User** icon in the **Action** column.



3. Click to select the **Disabled?** check box located under their email address.
4. Click **Update**.
5. A message will be displayed on the page advising the action is successful.

## Enable a Disabled User


A user record may be enabled from either the My Users List and when Editing a user record.

### “My Users” List

1. To **Enable** a user record from the user list
2. Click on the **Enable User** icon in the **Action** column of the **User list**.



3. A confirmation dialog box is displayed, click **OK**.
4. From the **User List**, the enabled user will not have a check mark in the **Disable?** Column of the detail line.

Action	Email	Disable?
	admin@deltaccontrols.com	

### Edit My User

1. To **Enable** a user record from the **Edit My User** view.
2. Locate the user in the My Users list. Click on the **Edit User** icon in the **Action** column.



3. Click to de-select the **Disabled?** check box.
4. Click **Update**.
5. A message will be displayed on the page advising the action is successful.

## Document Revision History

Document Edition Number	Date Published	Author	Change Description
2.2	April 29, 2020	Lorraine Stewart	1. Final formatting check and Publish to myDelta page for upload by IS.
2.2	February 6, 2020	Lorraine Stewart	<ul style="list-style-type: none"> <li>2. Updated Contents page with new numbers. Added to page 18 “Classroom and Online Training Grades”</li> <li>3. Updated page 2 wording “About this Guide” and footer with new edition #2.2</li> <li>4. Updated page 3 footer with new edition #2.2</li> <li>5. Fixed point #4 removing “d.”</li> <li>6. Multiple images updated throughout</li> <li>7. Added new Training Grades/Classroom grades detail throughout.</li> <li>8. Corrected a couple of spelling errors</li> <li>9. Removed all “Delta Exchange” references.</li> <li>10. Removed all “End User Forum” references.</li> <li>11. Updated PSG wording in multiple places to: “Professional”</li> <li>12. Page 23 added “Principals” to User Management table.</li> <li>13. Added new section “Online Ordering”</li> <li>14. Page 30 added wording: choosing “Purchasing” does not implement access to Online Ordering.</li> </ul>
2.0	July 27, 2017	Danis Sale	<ul style="list-style-type: none"> <li>15. Delta Logo updated</li> <li>16. Multiple Procedure Updates throughout Guide</li> <li>17. Screenshots updated</li> </ul>
1.5	September 29, 2016	Lorraine Stewart	<ul style="list-style-type: none"> <li>1. Logon Page – added list of browsers</li> <li>2. Passport Functionality added new image of “Passport Resources”</li> <li>3. My Profile Page – added new image showing tabs and descriptions</li> <li>4. Preferred Communications - PSG added</li> <li>5. My Users – added new image “Export” button</li> <li>6. Access Types – added Constant Contact – Owner &amp; User plus PSG</li> <li>7. Edit My User image updated</li> <li>8. Delta Services Options added: PSG, Constant Contact; Cloud</li> <li>9. Access Permissions – added images for user types</li> <li>10. Functional Areas – added “Sales”</li> </ul>
1.0	November 25, 2015	Tracey Rossi	None