Manage People

Reynolds & Reynolds

ReverseRisk®

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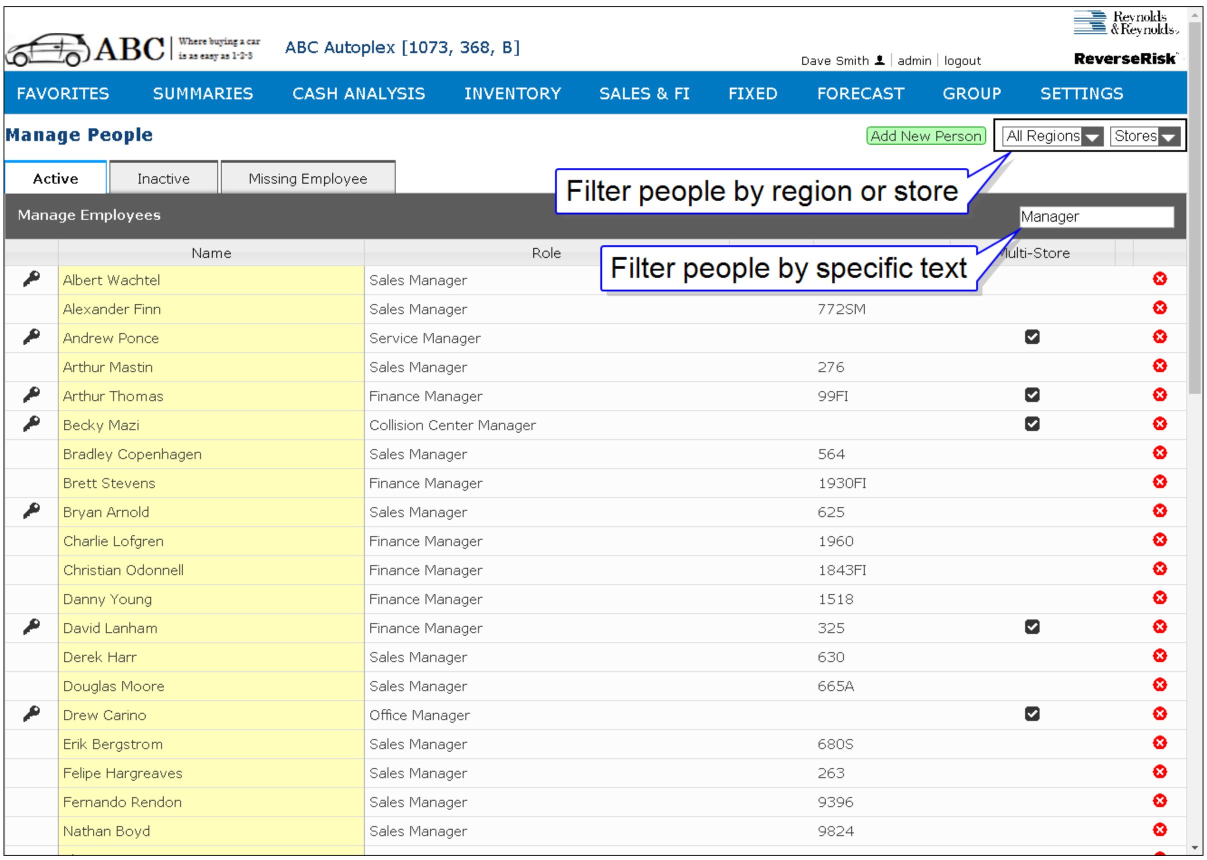
Manage People Screen

The Manage People screen is used to add and edit person records in ReverseRisk®. Using this screen, you can define a person's access role, grant a person access to the appropriate stores, and reactivate people who were previously deactivated.

Only one person record can be created for each person at the dealership or group of dealerships. DMS IDs only need to be assigned to people who display on reports in ReverseRisk®, such as sales managers and service advisors. Each person record must have a unique name.

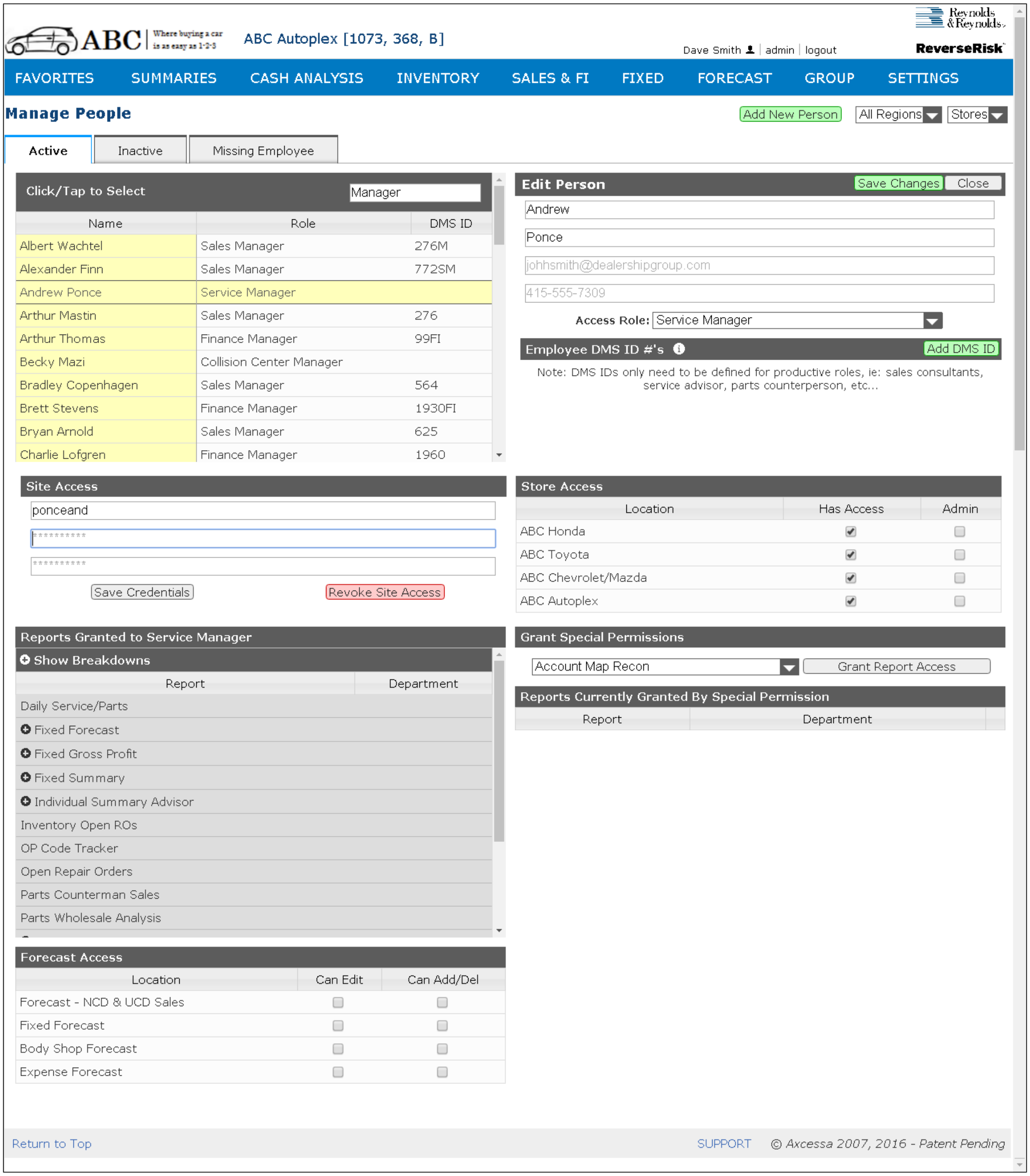
To access the Manage People screen, select Settings > Manage People.



People listed on the Manage People screen can be filtered by region or store using the **Regions** field or the **Stores** field. In addition, the **Filter Results** field can be used to display records based on whether the name or access role includes specific text. For example, enter **Manager** in this field to only display people with a manager access role.

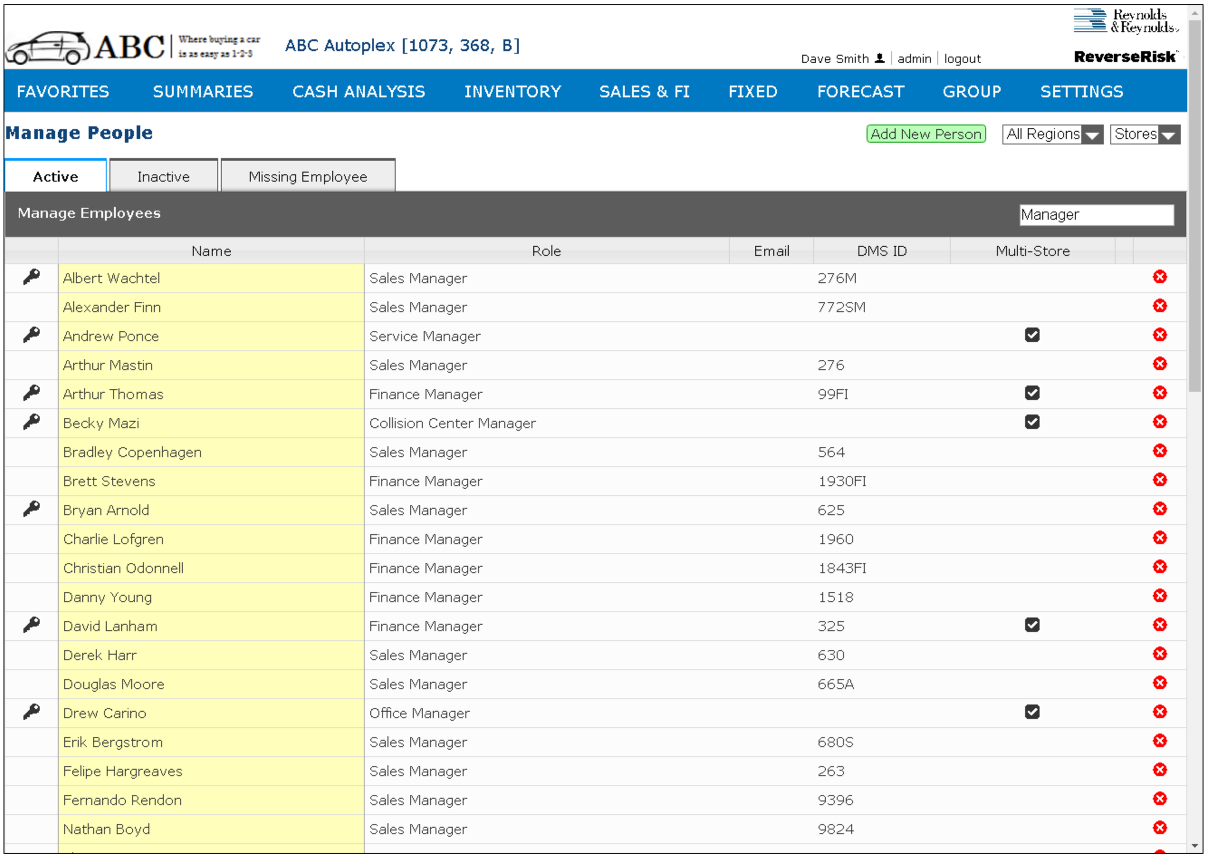
Active Tab

This tab displays the active person records at all stores within the group. Using this tab, you can verify that the appropriate access roles and reports are defined.



Manage Existing People

When the Manage People screen is accessed, a list of active person records displays. To review additional details for a person record or make changes, click the person record.



	Name	Role	Email	DMS ID	Multi-Store	
🔑	Albert Wachtel	Sales Manager		276M		✖
	Alexander Finn	Sales Manager		772SM		✖
🔑	Andrew Ponce	Service Manager			☑	✖
	Arthur Mastin	Sales Manager		276		✖
🔑	Arthur Thomas	Finance Manager		99FI	☑	✖
🔑	Becky Mazi	Collision Center Manager			☑	✖
	Bradley Copenhagen	Sales Manager		564		✖
	Brett Stevens	Finance Manager		1930FI		✖
🔑	Bryan Arnold	Sales Manager		625		✖
	Charlie Lofgren	Finance Manager		1960		✖
	Christian Odonnell	Finance Manager		1843FI		✖
	Danny Young	Finance Manager		1518		✖
🔑	David Lanham	Finance Manager		325	☑	✖
	Derek Harr	Sales Manager		630		✖
	Douglas Moore	Sales Manager		665A		✖
🔑	Drew Carino	Office Manager			☑	✖
	Erik Bergstrom	Sales Manager		680S		✖
	Felipe Hargreaves	Sales Manager		263		✖
	Fernando Rendon	Sales Manager		9396		✖
	Nathan Boyd	Sales Manager		9824		✖

The following details display for each employee record.

- 🔑 **(Person Has Site Access)**: This column displays the 🔑 (Person Has Site Access) icon if the person has access to ReverseRisk®. If this icon does not display for a person, the person is included on reports in ReverseRisk® but cannot access ReverseRisk®.
- **Name**: This column displays the person's first and last name, as defined in ReverseRisk®.
- **Role**: This column displays the access role assigned to the person.

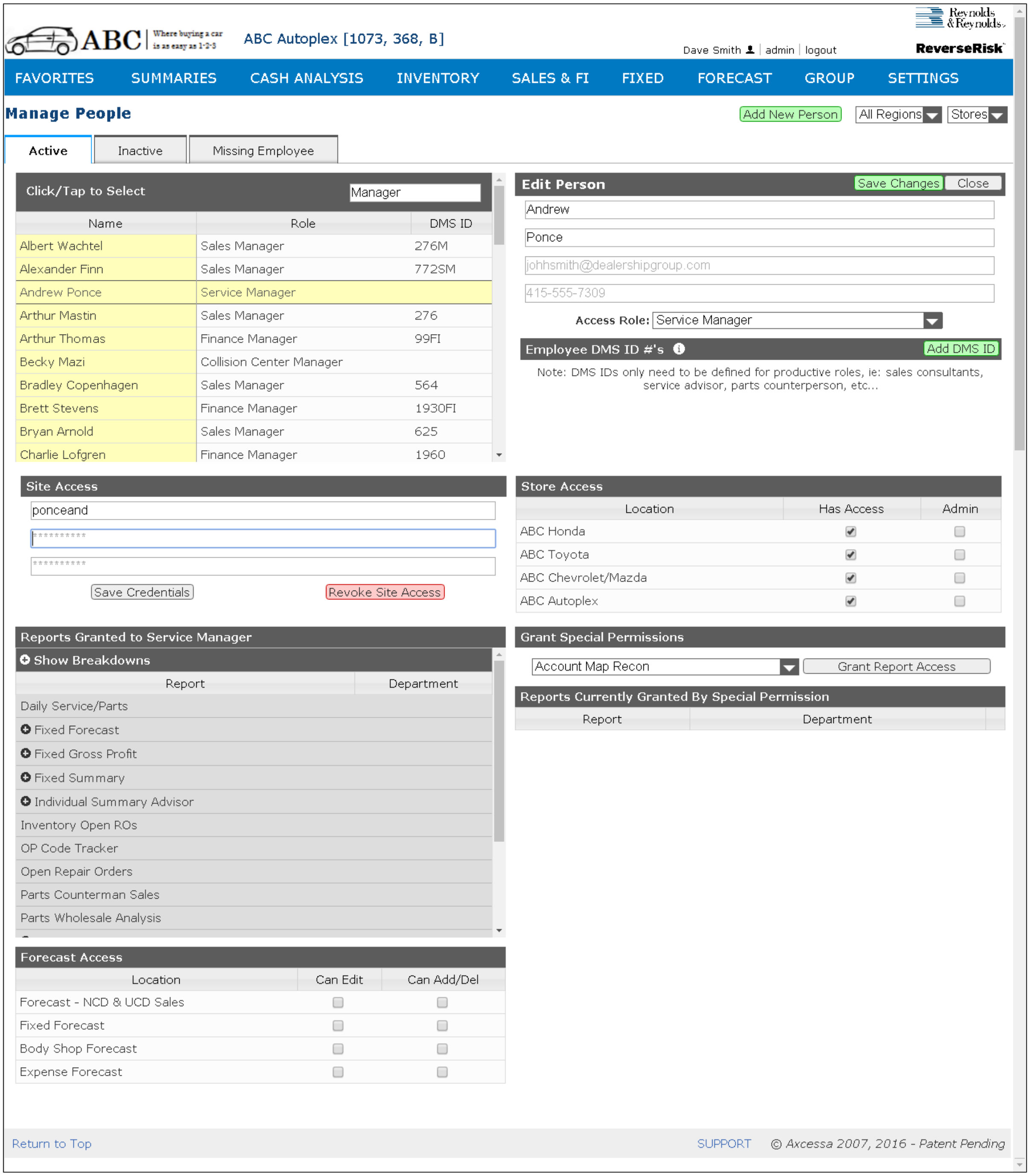
> Access roles are used to provide people with access to the reports they are likely to use, based on the typical job duties of each access role. Special permissions can be defined to provide a person with access to additional reports.

- **Email**: This column displays the Internet Email address of the person, as defined in ReverseRisk®.
- **DMS ID**: This column displays the DMS IDs for the person.
- **Multi-Store**: This column displays a (Checkmark) if the person has access to multiple stores in ReverseRisk®.
- **(Email User)**: This unlabeled column displays the (Email User) icon. Click this icon to send an Email message to the person that includes his user name and password for accessing ReverseRisk®.

> This icon only displays if an Internet Email address has been defined for the person and the person has access to ReverseRisk®.

- **(Deactivate)**: This unlabeled column displays the (Deactivate) icon that can be clicked to deactivate a person. When a person is deactivated, they cannot access ReverseRisk®. In addition, only their DMS ID displays on reports.

When a person record is clicked, additional sections display on the Active tab that can be used to define other settings, such as store access and special permissions. The list of active people remains on screen in the Click/Tap to Select section, allowing you to easily select additional people records as needed.



The sections that display on the Active tab vary based on whether the selected person has access to ReverseRisk® or is only listed on reports.

Only one person record can be created for each person at the dealership or group of dealerships. DMS IDs only need to be assigned to people who display on reports in ReverseRisk®, such as sales managers and service advisors. Each person record must have a unique name.

- **Edit Person**: This section is used to modify basic information for the person, such as the Email address, phone number, and access role.

> Access roles are used to provide people with access to the reports they are likely to use, based on the typical job duties of each access role. Special permissions can be defined to provide a person with access to additional reports.

- **Employee DMS ID #'s**: This section is used to associate people with DMS IDs. When a DMS ID is associated with a person record, the corresponding person name displays on reports.

  Report information and the corresponding person's DMS ID numbers are automatically imported from the DMS to ReverseRisk®. To include person names on reports in ReverseRisk®, the DMS ID numbers must be associated with person records. If a person has multiple DMS IDs for different access roles, each DMS ID number can be associated with a single person record in ReverseRisk®.

- **Setup Site Access button**: This button is used to grant the person access to ReverseRisk®. When this button is clicked, the Site Access section displays, where you can create a user name and password for the person.

- **Site Access**: *(People with ReverseRisk® Access Only)* This section is used to update the person's user name and password. In addition, you can remove the person's site access by clicking **Revoke Site Access**. Information for the person continues to display on reports; however, the person does not have access to ReverseRisk®.

- **Store Access**: *(People with ReverseRisk® Access Only)* This section is used to grant and remove access to stores in the group. In addition, you can grant access to system administrator functions by selecting the **Admin** check boxes for the appropriate stores.

- **Reports Granted to (Access Role)**: *(People with ReverseRisk® Access Only)* This section displays the reports that are available for the person to view based on the access role assigned to the person.

> The Enhanced Administration Page screen is used to define which reports are available to each access role. To access this screen, select Settings > Report Roles.

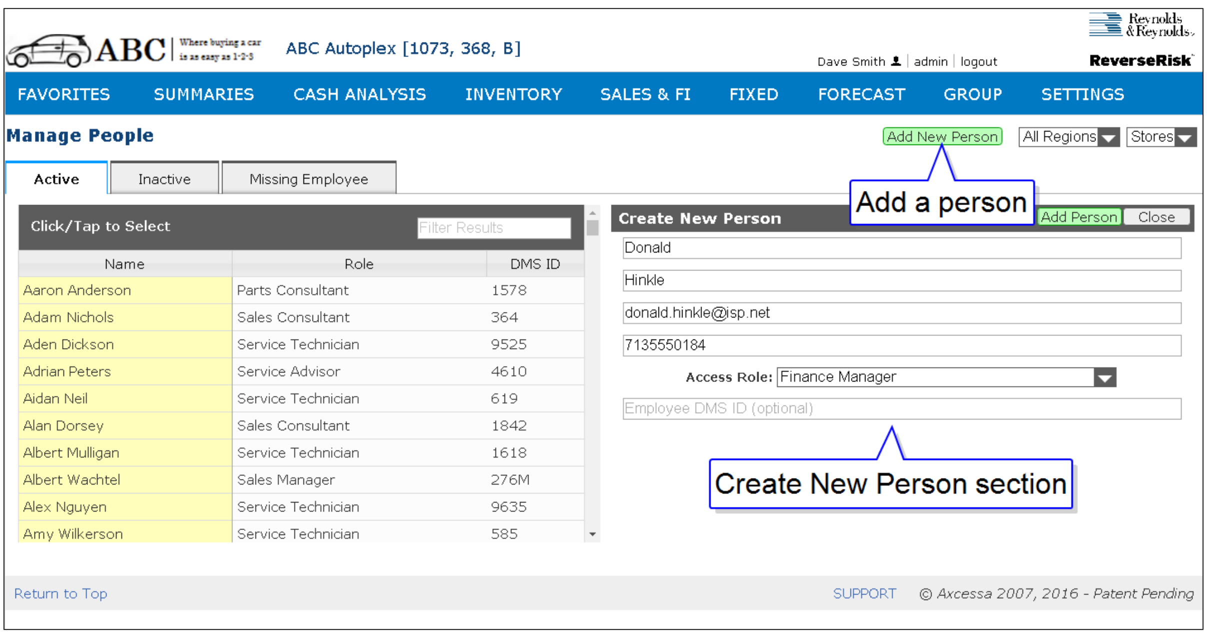
- **Grant Special Permissions**: *(People with ReverseRisk® Access Only)* This section is used to grant access to reports and functions that are not automatically granted based on the assigned access role. When special permissions are granted, they display in the Reports Currently Granted By Special Permission section.

  Special permissions can be revoked by clicking the (Delete) icon for the report or function.

- **Forecast Access**: *(People with ReverseRisk® Access Only)* This section is used to grant or remove the person's access to create, change, and/or delete forecasts for each area of the dealership.

Add a Person

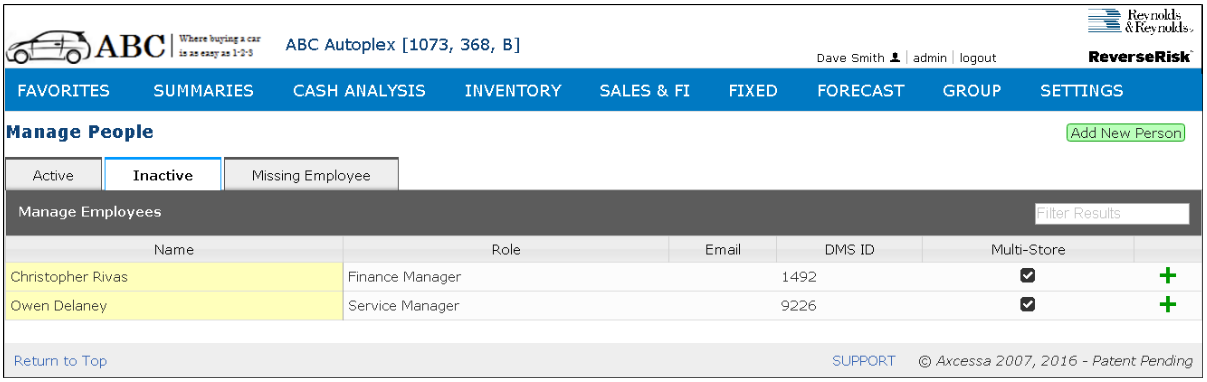
To add a person on the Manage People screen, click **Add New Person**. The Create New Person section displays, where you can define person details.



For a detailed procedure on adding a person record, refer to How to Add a Person Record.

Inactive Tab

This tab displays people who were previously deactivated in ReverseRisk®. Using the Inactive tab, you can review basic person information and reactivate a person as needed to include them on reports or create a user record.



The following details display for each person record.

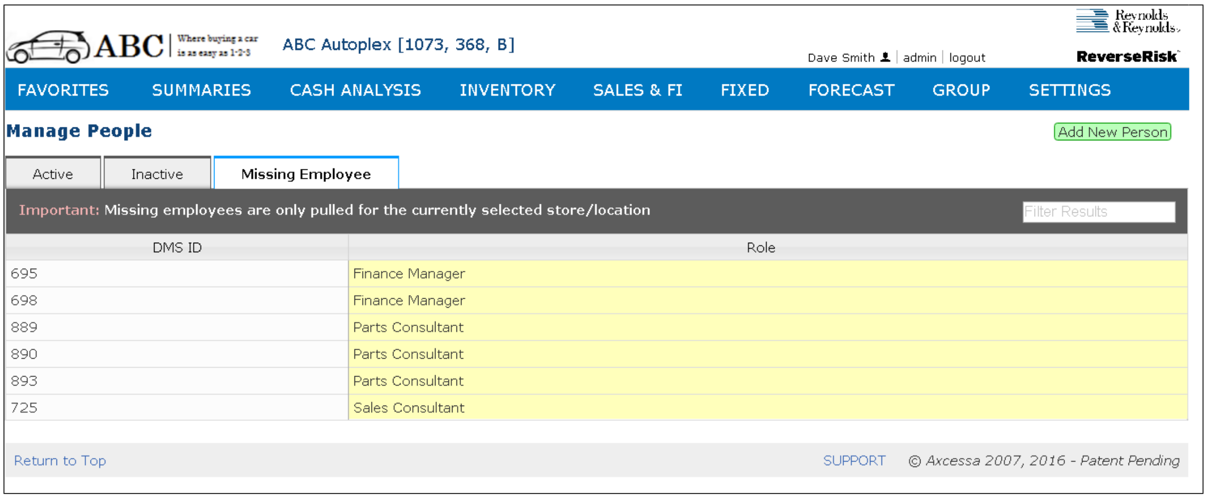
- **Name**: This column displays the person's first and last name, as defined in ReverseRisk®.
- **Role**: This column displays the access role assigned to the person.

> Access roles are used to provide people with access to the reports they are likely to use, based on the typical job duties of each access role. Special permissions can be defined to provide a person with access to additional reports.

- **Email**: This column displays the Internet Email address of the person, as defined in ReverseRisk®.
- **DMS ID**: This column displays the DMS IDs for the person.
- **Multi-Store**: This column displays a (Checkmark) if the person has access to multiple stores in ReverseRisk®.
- **(Reactivate)**: This column displays the (Reactivate) icon that can be clicked to reactive a person record.

Missing Employee Tab

This tab displays the DMS IDs for the selected store that are not associated with a person record in ReverseRisk®. Using this tab, you can easily associate a DMS ID with a person record.



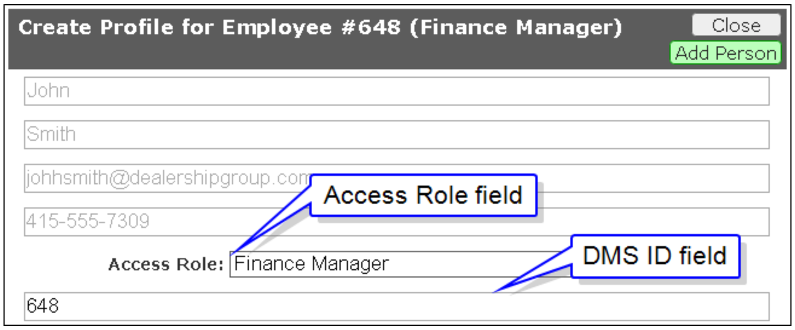
The following details display for each person record.

- **DMS ID**: This column displays the DMS IDs for the person.
- **Role**: This column displays the access role assigned to the person.

> Access roles are used to provide people with access to the reports they are likely to use, based on the typical job duties of each access role. Special permissions can be defined to provide a person with access to additional reports.

Associate a Person Record with a DMS ID

To create a person record for a missing DMS ID, select a DMS ID on the Missing Employee tab. The Create Profile for Employee #NNN (Access Role) section displays, where "NNN" is the DMS ID and "(Access Role)" is the dealership access role selected. The dealership access role is automatically entered in the **Access Role** field, and the DMS ID is automatically entered in the **DMS ID** field.



Add the person's name, Email address, and phone number. Then verify the access role and click **Add Person**. A person record is added for the DMS ID, allowing the person name to be matched with the appropriate report data.

How to Add a Person Record

The Active tab on the Manage People screen is used to add a new person record to ReverseRisk® and associate a dealer management system (DMS) ID with the person.

> Only one person record can be created for each person at the dealership or group of dealerships. DMS IDs only need to be assigned to people who display on reports in ReverseRisk®, such as sales managers and service advisors. Each person record must have a unique name.

1. Access the Manage People screen.

   > The Manage People screen is accessed using the following path: Settings → Manage People.

2. Click **Add New Person**.

   The Create New Person section displays on the Active tab.

3. In the unlabeled **First Name** field, enter the first name of the person.
4. In the unlabeled **Last Name** field, enter the last name of the person.
5. In the unlabeled **Email** field, enter the Internet Email address for the person.
6. In the unlabeled **Phone Number** field, enter the person's phone number.

   > The phone number must be entered in the following format: XXX-XXX-XXXX.

7. In the **Access Role** field, enter the dealership access role for the person.

   Click the Down Arrow to display a list of valid entries.

8. *(Optional)* In the **Employee DMS ID** field, enter the DMS ID for the person.

   > Report information and the corresponding person's DMS ID numbers are automatically imported from the DMS to ReverseRisk®. To include person names on reports in ReverseRisk®, the DMS ID numbers must be associated with person records. If a person has multiple DMS IDs for different access roles, each DMS ID number can be associated with a single person record in ReverseRisk®.

9. Click **Add Person**.

   A record is added for the person, and the Employee DMS ID #'s section and the **Setup Site Access** button display.

10. *(Optional)* To associate the person with additional DMS IDs, click **Add DMS ID**.

    For more information on associating people with additional DMS IDs, refer to Associating DMS IDs with a Person.

11. To grant the person access to ReverseRisk® and set up ReverseRisk® credentials, click **Setup Site Access**.

    The Site Access section displays. Proceed to step 12.

    - or -

    To add the person without granting access to ReverseRisk®, proceed to step 19.

12. In the Site Access section, define a user name and password for the person.

13. Click **Save Credentials**.

    The user name is saved for the person.

14. In the Store Access section, select the **Has Access** check box to grant access to stores in the group.

15. Select the **Admin** check box to grant access to system administrator functions for the corresponding stores.

16. *(Optional)* In the Grant Special Permissions section, grant the person access to reports that are not automatically granted based on the person's assigned access role, as needed.

    For more information on granting special permissions to reports, refer to Granting Special Permissions to Reports.

17. Select the **Can Edit** check box in the Forecast Access section to grant access to change forecasts for each area of the dealership.

18. Select the **Can Add/Del** check box in the Forecast Access section to grant access to create or delete forecasts for each area of the dealership.

19. Once all updates have been made, click **Save Changes** in the Edit Person section.

    The record is saved.

How to Add a Person Record for a Specific DMS ID Number

The Missing Employee tab on the Manage People screen is used to review the dealer management system (DMS) ID numbers not currently associated with a person record. This tab can be used to create a new person record based on the employee number from the DMS.

1. Access the Manage People screen.

   > The Manage People screen is accessed using the following path: Settings → Manage People.

2. Click the Missing Employee tab.

   The Missing Employee tab displays all DMS ID numbers not currently associated with a person record.

3. Click a DMS ID to add a person record for the corresponding DMS ID.

   The Create Profile for Employee #NNN (Access Role) section displays, where "NNN" is the DMS ID and "(Access Role)" is the dealership access role selected. The dealership access role is automatically entered in the **Access Role** field, and the DMS ID is automatically entered in the **DMS ID** field.

4. In the unlabeled **First Name** field, enter the first name of the person.
5. In the unlabeled **Last Name** field, enter the last name of the person.
6. In the unlabeled **Email** field, enter the Internet Email address for the person.
7. In the unlabeled **Phone Number** field, enter the person's phone number.

   > The phone number must be entered in the following format: XXX-XXX-XXXX.

8. In the **Access Role** field, enter the access role for the person.

   Click the Down Arrow to display a list of valid entries.

   > Access roles are used to provide people with access to the reports they are likely to use, based on the typical job duties of each access role. Special permissions can be defined to provide a person with access to additional reports.

9. Click **Add Person**.

   A record is added for the person, and the **Setup Site Access** button displays. For more information on setting up site access for the person, refer to Setting Up Site Access for a Person.

How to Modify a Person Record

The Active tab on the Manage People screen is used to modify a person record and deactivate a person record. For more information on deactivating a person record, refer to How to Deactivate a Person Record.

1. Access the Manage People screen.

   > The Manage People screen is accessed using the following path: Settings → Manage People.

2. Select a person record.

   The person record displays.

3. In the Edit Person section, modify the person name, Internet Email address, phone number, and dealership access role as necessary.

4. Modify associated dealer management system (DMS) IDs, site access, store access, report access, and so on as necessary. For more information on adjusting these settings, refer to the following Advanced Topics.

5. Click **Save Changes**.

   The changes are saved, and a message window displays, indicating the person record is updated.

Advanced Topics

Associating DMS IDs with a Person

Multiple DMS IDs can be associated with an existing person record using the Employee DMS ID #'s section on the Manage People screen. To associate a new DMS ID with a person, access the person record and click **Add DMS ID** in the Employees DMS ID #'s section. Then enter the DMS ID, dealership access role, and store, and click **Save**. The information is saved for the person, and additional DMS IDs can be associated with the person record as needed. To remove a DMS ID from a person record, click **Remove**.

> Report information and the corresponding person's DMS ID numbers are automatically imported from the DMS to ReverseRisk®. To include person names on reports in ReverseRisk®, the DMS ID numbers must be associated with person records. If a person has multiple DMS IDs for different access roles, each DMS ID number can be associated with a single person record in ReverseRisk®.

Setting Up Site Access for a Person

The Site Access section on the Manage People screen is used to grant a person access to ReverseRisk®. To grant access for the person, access the person record on the Manage People screen and click **Setup Site Access**. Fields display for defining a User ID and password for the person. Enter the user name for the person and enter a password used to sign on to ReverseRisk® for the person.

> A password must be at least six characters in length and include both letters and numbers. In addition, if the passwords entered in the **Password** field and the **Confirm Password** field do not match, a red border displays on these fields. When matching passwords are entered, a green border displays.

Click **Save Credentials** to save the entered user name and password, and grant the corresponding person access to ReverseRisk®. If an Email address is defined for the person, click the (Email User) icon on the Active tab on the Manage People screen to send an Email message to the person that includes the user name and password needed for accessing ReverseRisk®.

Defining Store Access for a Person

The Store Access section on the Manage People screen is used to define which stores within the dealership group are accessible to a person. To grant access to a specific store, select the corresponding **Has Access** check box in the Store Access section. To save the changes, click **Save Changes** in the Edit Person section.

When a person is granted access to multiple stores in ReverseRisk®, a (Checkmark) displays in the **Multi-Store** column on the Active tab on the Manage People screen.

Granting Special Permissions to Reports

The Reports Granted To (Role) section displays all reports granted to a person based on the role defined for the employee. To grant a person access to additional reports not associated with his access role, access the person record on the Manage People screen.

In the Grant Special Permissions section, select the report for which to grant access to the person and click **Grant Report Access**. The report displays in the Reports Currently Granted By Special Permission section.

Click the (Delete) icon in the Reports Currently Granted By Special Permission section to remove access to the corresponding report.

How to Deactivate a Person Record

The Manage People screen is used to deactivate person records. When a person is deactivated, they cannot access ReverseRisk®. In addition, only their DMS ID displays on reports.

1. Access the Manage People screen.

> ➡ The Manage People screen is accessed using the following path: Settings → Manage People.

2. Click the (Delete) icon to deactivate the corresponding person record.

   A message window displays, confirming the person record is to be deactivated.

3. Click **Deactivate Person** to deactivate the person record.

   The person record is deactivated, is removed from the Active tab, and displays on the Inactive tab.

Advanced Topics

Activating People

Deactivated person records can be activated using the Inactive tab on the Manage People screen. To activate a person record that has been previously deactivated, click the (Activate) icon corresponding to the person record. A message window displays, confirming the person record is to be activated. Click **Activate Person** to activate the person record. The person record is activated, is removed from the Manage Employees section on the Inactive tab, and displays on the Active tab.