Partner Portal Web Application User Guide

This document provides an overview of how to use the Partner Portal web application provided by the Florida Department of Highway Safety and Motor Vehicles.
Partner Portal Web Application User Guide

This document will provide an overview to using Partner Portal web application provided by the Florida Department of Highway Safety and Motor Vehicles (DHSMV). The intended audience for this document is those who are subscribed to one or more data exchanges provided by DHSMV.

The Partner Portal web application (“the application”) is a web application designed to allow vendors who are subscribed to one or more data exchanges to manage various accounts and banking details, as well as view details of transactions which have occurred using the vendors’ service accounts.
## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>April 2, 2013</td>
<td>Shawn Christiansen</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>1.1</td>
<td>June 2, 2013</td>
<td>Shibu Abraham</td>
<td>Miscellaneous revisions.</td>
</tr>
<tr>
<td>1.2</td>
<td>August 1, 2013</td>
<td>Kenneth Kaufmann</td>
<td>Revised document structure and content.</td>
</tr>
</tbody>
</table>
Contents

Revision History .................................................................................................................................................. 2
Account Types .................................................................................................................................................... 4
Registration ....................................................................................................................................................... 5
Login ................................................................................................................................................................ 12
  Account Credential Recovery ............................................................................................................................ 13
Application Tabs ................................................................................................................................................. 16
  Home ............................................................................................................................................................... 16
  Profile ............................................................................................................................................................. 17
    Login Information ........................................................................................................................................... 18
    Security Questions ......................................................................................................................................... 19
    Profile Information ....................................................................................................................................... 20
Accounts ............................................................................................................................................................ 21
  Service Accounts ............................................................................................................................................. 21
  Partner Portal User Accounts ............................................................................................................................ 25
Reports ............................................................................................................................................................... 29
Account Types

There are three account types within the application:

- **Admin accounts**: Used to log in to the application. Such accounts have full access to modify and create other accounts, update banking information, review contract details and data exchange subscriptions, as well as view transaction reports. These accounts cannot be submitted to data exchanges as service credentials.

- **Service accounts**: Submitted to the data exchange(s) to which they are associated as service credentials. These accounts cannot be used to log in to the application.

- **User accounts**: Used to log in to the application. Such accounts are read-only accounts that can review contract details and data exchange subscriptions, as well as view transaction reports. These accounts cannot be submitted to data exchanges as service credentials.
Registration

Before you can proceed using the application, you must be registered. Once DHSMV has authorized you to proceed to production with your software, you will be sent a link to register with the application. You will need information provided by DHSMV in order to register.

As visible above, you will be provided with a **contract number** and a **last name** for the contact person of your organization. This information will recorded by DHSMV during the setup of your contract. *It is important that you use the exact information that DHSMV provides you for these fields. Failure to do so will cause your registration to not succeed.*

Once you submit these details, you should be advanced to a page requesting an email address. Enter in the email address where you would like to receive your registration link:
Once you submit your email address to the system, you should shortly receive an automated email from the system. This system-generated email will contain a link for you to click. Clicking this link will take you to a page where you can complete your registration process:
On this new page, complete all input fields, and then save your information via the “Save” button. The username and password you are entering here will be for your **administrative account** (“admin account”). An admin account is what you use to log in to the Partner Portal application on subsequent sessions.\(^1\) The credentials for this account should be protected by you. With this account you can modify banking details, setup or disable both service and user accounts (discussed later), and view transaction reports. This account can also modify passwords for any type of account.

Make certain that the password you select meets the criteria listed at the bottom of this page.

Two security questions are required to be selected by you. In the event that you forget your admin account password, the answers to these two questions will aide you in resetting your admin account password.

Once you have completed this screen, you will be required to log in using the new credentials you just established:

\(^1\)**Important**: Do not submit this username and password to any data exchange service you are subscribed to. Data exchanges require a *service account*, which will be discussed later within this document.
Once you have logged in with your admin account, you will be presented with the “Profile” screen:
The first time you log in to Partner Portal, you will need to enter banking information. Click the “Edit Billing” button to begin this process:
You will then be presented with a series of input boxes to complete. Enter the appropriate details, and then click the “Save” button:

You will receive notification that your banking details were accepted once you click the “Save” button:
At this point, your registration is complete. In order to access any of the data exchanges you are subscribed to, you must create a service account.
Login

The application is secured with a username and password combination. If you have already completed the registration process, then you should have your admin username and password. You will use these credentials to log in to the application. If you have not already registered, please review the Registration section of this document.

Log in to the application by entering your username and password into their respective fields; then click the “Log On” button:
Account Credential Recovery
If you have forgotten your admin account username, then click the “Forgot UserName?” link. You will be advanced to a page that will assist you in recovering your username:

![User Name Recovery](image)

Enter the contract number that DHSMV provided you with for registration. Also, enter the email address that you entered during the registration process. Once you have entered these details, click the “Submit” button, and the system will generate an automated email that will provide you with your username.

If you have forgotten your admin account password, then click the “Forgot Password?” link. You will be advanced to a page that will assist you in recovering your password:

---

2 If you have modified your profile information via the “Profile” tab, then enter the email address that you entered during that update to your profile.
Enter the username you selected during the registration process. Also, enter the email address that you entered during the registration process. Once you have entered these details, click the “Submit Username” button. You will then be advanced to a page where you can enter in the answers to the security question that you set up during the registration process:
Once you have entered in the answers to both security questions, click the “Submit Answers” button. If you entered the correct answers, then you will receive a system-generated email containing a new, randomly-generated, temporary password that will allow you to log in to the application. If you answered either incorrectly, you will be presented with an error message.
Application Tabs

Home
The “Home” page displays an overview of your contract and the data exchanges you are subscribed to. Each data exchange will indicate its current status.
Profile
The “Profile” page is an overview of the account that is currently logged in to the application. This can be either an admin account or a user account.
Login Information
The “Login Information” section provides a summary of details related to the currently logged-in account. The “User Name” field displays the username of the currently logged-in user. The “Account Type” field displays the type of account that is currently logged in to the application. The “Password” field will not display the user’s password, but it does provide a link entitled “Change”. Clicking this link will advance you to a page where you may update the password associated with the logged-in account. The “Account Status” provides a status of the account that is currently logged in to the application. This typically applies to user accounts, which can be disabled.
Security Questions
The “Security Questions” section allows you either to edit which security questions are associated with this account or to edit the answers to the questions associated with this account, or both. Clicking the “Edit Questions” will display fields that permit you to edit either.
Profile Information

The “Profile Information” section provides a summary of the name and email address associated with the currently logged-in account. You may make modifications to this information by clicking the “Edit Profile” button. Clicking this button will display fields that permit you to enter this information.
Accounts
The “Accounts” page provides an overview of the accounts that have been created under this contract. Both user accounts and service accounts are summarized on this page. You are provided the ability to create new accounts as well as modify existing accounts via this page.

Note: This tab is not visible, nor is the associate page accessible to Partner Portal User Accounts. Only an admin account has permission to view and use this page.

Service Accounts
A service account is a set of credentials that your software will submit to the data exchange(s) you are subscribed to. Neither an admin account nor a user account can be used for accessing data exchanges. Submission of either of those two account credentials to a data exchange will result in an error response being returned to your software.

At your discretion, you may create one or more service accounts via the application. Clicking on the “Accounts” tab will take you to the page where you may create new accounts:

On the “Accounts” page, you may create both new user accounts and new service accounts. Clicking on the “Create New Service Account Link” will allow you to create the latter:
On the “Create Service Account” page, you may associate a new service account with one or more data exchanges. Which data exchanges are available to you will be dictated by your contract with DHSMV. Contact the Data Listing Unit at DataListingUnit@flhsmv.gov for information pertaining to how to subscribe to other data exchanges.

You may also mark a new service account as “Active” or “Disabled”. Active service accounts can be used to access the data exchange(s) for which they have been registered; disabled accounts cannot be used to access the data exchange(s) for which they have been registered. A disabled account will only permit access to a data exchange once it has been marked “Active”.

Be sure to follow the password guidelines listed at the bottom of this page. Passwords which do not meet the criteria specified will result in an error, and you will be required to modify the entered password.
Once you have entered a valid password, you can click the “Save” button at the bottom of this page. You will be advanced to a confirmation page which displays the username and password for this service account. Take note of this credential. You will submit it via your software to the data exchange(s) which you selected on the “Create Service Account” page.
Usernames for service accounts are randomly generated by the system. You will not have access to change the username of any service account which you create. However, the “Accounts” page will always display to you the username(s) associated with service accounts you have created for your data exchange(s):
You may change the password for a service account at your discretion via the “Set Password” link. You may disable or enable a service account via the “Edit” link.

**Partner Portal User Accounts**
A user account is a set of credentials that you can use to provide read-only access to the application. With a user account, one can view transaction reports for the data exchanges. User accounts **cannot** be used to authenticate with any data exchange.

At your discretion, you may create one or more user accounts via the application. Clicking on the “Accounts” tab will take you to the page where you may create new accounts:
On the “Accounts” page, you may create both new user accounts and new service accounts. Clicking on the “Create New User Account Link” will allow you to create the former:

On the “Create User Account” page, there is no way to associate a new user account with one or more data exchanges. This is because a user account is intended to be used to log in to the application, not for interaction with any particular data exchange system.

You may also mark a new user account as “Active” or “Disabled”. Active user accounts can be used to log in to the application; disabled accounts cannot be used to log in to the application. A disabled account will only permit access to the application once it has been marked “Active”.

Once you have entered values for all inputs on this page, clicking the “Save” button will create your new user account:
Take note of the username and password that was created for you. For user accounts, initially both the username and password are system-generated. You will have no way of changing the username for the service account; however, at your discretion you may change the password by clicking the “Set Password” link within the row that contains the username of the account you would like to modify.

Once created, you may modify the status of a user account from “Active” to “Disabled” and vice versa by clicking the “Edit” link within the row that contains the username of the account you would like to modify. You may also update the name and email associated with this username by clicking the “Edit” link.
Reports
The “Reports” page provides you with the ability to run transaction reports for data exchange requests made via any of the service accounts created under your contract (i.e. any service account listed on the “Accounts” page). You may narrow your reporting span by entering in a beginning and ending date in the appropriate input boxes on this page. The application also permits you to export the report data to either Excel or PDF formats, which you can save to your local computer.