



How To Guide Delegation of Authority

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Delegated Authority Overview

With Delegated Authority, you can assign permissions to multiple users to complete self-service activities. This allows delegators to assign delegate permissions, track actions and easily add and remove delegates. Below are the list of features available to you in the program.

Delegated Authority Feature List

- **ACCESS ID**
The Access ID must be set up to begin using Delegated Authority. The Access ID is a unique 4 digit number that is set on the My Info page.
- **ADD INVITES**
The Add Invites feature allows the Delegator to enter email addresses of users they would like to delegate authority and set their account privileges all on one screen.
- **MANAGE INVITES**
The Manage Invites feature allows the Delegator to resend and delete invitations that have not been accepted by users.
- **MANAGE DELEGATES**
The Manage Delegates feature allows the Delegator to update account and delegate privileges by using the Filter by Account or Filter by Delegate feature. Delegators can also assign existing delegates and assign accounts. This feature provides the Delegator with all the necessary features to manage account permissions on a per delegate or per account basis.
- **DELETE DELEGATES**
The Delete Delegates feature allows the Delegator to easily delete Delegates from the system.
- **RECENT ACTIVITY**
The Recent Activity feature allows the Delegator to see all Recent Activity by Delegates on their account.

Delegated Authority Features Overview & How-To

Access ID Feature

The Access ID must be set up to begin using Delegated Authority. The Access ID is a unique 4 digit number that is set on the My Info page.

How to Set Your Access ID

01	Login to your my.ouc.com Account
02	Click the "Delegated Authority" link in the left hand navigation
03	Click on any of the sub-menu items under Delegated Authority in the left nav or click any of the content areas on the page: Add/Manage Invites, Manage Delegates, Recent Activity, or Delete Delegates. The system will direct you to the My Info section of your account. There you will set your Access ID.
04	Set an Access ID in the Access ID section of the page. <i>NOTE: The Access ID is a unique 4 digit number.</i>
05	When complete, click "Update Information"

Add Invites Feature

The Add Invites feature allows a Delegator to enter email addresses of users they would like to delegate authority and set their account privileges all on one screen.

How to Add Invites

01	Login to your my.ouc.com Account
02	Click the link in the left navigation titled "Delegated Authority"
03	Click the link "Add/Manage Invites" in either the left navigation or in the main body of the page to go to the "Add/Manage Invites" page.
04	On the "Add/Manage Invites" page, click the "Invite Delegates" button.
05	In the open field under "Enter Email Address" , add the email addresses of the individuals you would like to provide account privileges.
06	In the table under "Select Accounts & Permissions" select the account permissions you would like to apply to the email addresses you just entered. <i>NOTE: The permissions selected will affect all Delegates entered in the email field. In order to grant individual permissions, you will need to assign them individually. Billing & Payment options do not apply to Traditional Government accounts.</i>
07	Once you have completed assigning permissions, click "Send Invites" <i>NOTE: Once invitations are sent an email is sent to the new Delegate with a link to register on my.ouc.com. An email is sent to the Delegator notifying them of their recent activity.</i>

Manage Invites Feature

The Manage Invites feature allows a Delegator to resend and delete invitations that have not been accepted by Delegated users.

How to Manage Invitations

01	Click the link labeled “ Add/Manage Invites ” in the left navigation to go to the “ Add/Manage Invites ” page.
02	The “ Manage Invites ” feature allows you to delete and resend invitations. Look in the Manage Invites table and notice the email addresses of the individuals you just invited.
03	<p>If you would like to delete an invitation, select the checkbox next to the email address and click “Delete Invites”. If you would like to resend an invitation, select the checkbox next to the email address and click “Resend Invites”.</p> <p><i>NOTE: A notification message will be displayed notifying you of the action you just performed. An email will be sent to the Delegate and the Delegator notifying them of the action that was just performed. Resending an invitation will extend the expiration another 30 days.</i></p>

Manage Delegates Feature

The Manage Delegates feature allows the Delegator to update account and delegate privileges by using the Filter by Account or Filter by Delegate feature. Delegators can also assign existing delegates and assign accounts. This feature provides the Delegator with all the necessary features to manage account permissions on a per delegate or per account basis.

How to Manage Delegates

01	<p>Click the link labeled “Manage Delegates” in the left navigation to go to the “Manage Delegates” page . The “Manage Delegates” page allows you to view Delegates assigned to an account by using the “Filter by Account” feature or view Accounts assigned to a Delegate by using the “Filter by Delegate” feature.</p> <p>NOTE: This feature is useful for updating the permission of Delegates already assigned to your account.</p>
02	<p>To update the permissions of Delegates assigned to a particular account, use the “Filter by Account” feature. In the table displayed, when you select a row or rows, you can update the privileges for a selected delegate or delegates using the “Select an Action” dropdown.</p>
03	<p>If you do not see a Delegate in the table and would like to add them to the selected account, use the “Assign Delegates” feature. Clicking “Assign Delegate” takes you to the “Assign Delegates” page where you can add existing Delegates to the specified account. Use the “Select Delegate Name” dropdown to select a delegate. Then click “Add” to add them to the selected account. Use the table to add privileges to that Delegate. Click “Done” when complete. Once you click “Done” the system will take you to back to the “Manage Delegates” page.</p>
04	<p>To update the permissions of accounts assigned to a particular Delegate, use the “Filter by Delegate” feature. In the table displayed, when you select a row or rows, you can update the privileges for a selected account or accounts using the “Select an Action” dropdown.</p>
05	<p>If you do not see an account in the table and would like to add one, use the “Assign Accounts” feature. Clicking “Assign Accounts” takes you to the “Assign Accounts” page where you can add existing Accounts to the specified Delegate. Use the “Select Account Number” dropdown to select an account number. Then use the table to add privileges to that account. Click “Done” when complete. Once you click “Done” the system will take you to back to the “Manage Delegates” page.</p> <p>NOTE: Any action performed on the Manage Delegates page will generate an email to the Delegator notifying them of any changes made to a delegate’s or an account’s permissions.</p>

Delete Delegates Feature

The Delete Delegates feature allows the Delegator to easily delete Delegates from the system. This will remove the Delegate from the system and they will need to be re-invited to perform delegate activities in the future.

How to Delete Existing Delegates

01	<p>Click the link labeled “Delete Delegates” in the left navigation to go to the “Delete Delegates” page.</p> <p>This page shows all Delegates assigned to your account. This feature allows you to delete one or all Delegates from your account.</p> <p><i>NOTE: Deleting Delegates from the page will remove them from Delegated Authority. If you want to remove delegates from specific accounts you will need to use the “Manage Delegates” feature. An email will also be sent to both the Delegate and the Delegator notifying them of the changes.</i></p>
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Recent Activity Feature

The Recent Activity feature allows the Delegator to see all Recent Activity by Delegates on their account.

How to View Recent Activity

01	<p>Click the link labeled “Recent Activity” in the left navigation to go to the “Recent Activity” page.</p> <p>This page allows the Delegator to view information in the table by account and select a date range to view recent activity. The table shows the Account Number, Delegate Name, User ID, Action performed, Action Details, Date/Time Performed, and Source.</p> <p><i>NOTE: By default the 25 most recent activites will be shown.</i></p>
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Frequently Asked Questions

What is a Delegator?

A Delegator is an individual in your company that has full access privileges on your account. The Delegator will be the individual that invites and assigns the access privileges to Delegates. This person would most likely be a high level individual with your company.

What is a Delegate?

A Delegate is an individual that has been granted specific access privileges by a Delegate to perform activities such as Billing & Payment, Service Requests, Report a Problem, View Account Summary. Delegates must be granted access by a Delegator.

What is an Access ID and how is it used?

Your Access ID is a unique 4 digit number used to authenticate access to OUC's IVR Phone System.

What phone number should I enter in my profile?

You should enter the number that you would routinely use to call into the IVR phone system.

How is the phone number used by the system?

The phone number is used to validate your account in order to access OUC's IVR Phone System.

What email address should be entered in my Delegator profile?

You should enter an email address that you check regularly as you will be receiving notifications that reference your delegates activities.

How is the email used by the system?

The email is used to receive notifications about account activity.

What if the phone number cannot be recognized by the IVR system?

If your phone number cannot be recognized by the IVR, you will be asked for the account number or the FEID number, then street address number, then access ID.

How do I manage Delegated Authority email notifications?

You can opt-out of Delegated Authority email notifications in the My Info section of your account

What would happen if I called from a number other than the one in my profile?

The system would not recognize you and you would not be able to perform activities on your account.

Who is the best person to be a Delegator in my organization?

The most likely individuals in your company to be a Delegator is a high level individual in the organization like a General Manager, VP, Manager of Accounting, etc.

Who should I assign as Delegates?

Delegates should be individuals in your organization that you trust to perform self service activity on your account.