eTrace

System Usage Guide for Primary Users

V1.1

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eTrace
Primary User Guide

Document History

Version Number	Date Updated	Description of Change	Author
1.0	24/08/2017	Creation of document	Erica Belluccini
1.1	18/03/2019	Updated document – Product refresh	Jason Valdez

Document Purpose

The purpose of this document is to outline the functionality of the Primary users (administrators) within the eTrace platform.

This document will outline:

- An overview of the platform;
- Information on platform functionality.

System Overview

The eTrace system is specifically designed for skip tracing and people location industries. This guide covers the Administrative usage of the eTrace system. Day to day search functionality is discussed in a separate System Usage guide.

Requirements

The eTrace system runs as a web interface and will work in any modern web browser. Access to the Internet is required in order to use the system.

Supported Web Browsers

- Internet Explorer Version 10 or greater
- Microsoft Edge
- Google Chrome
- Safari version 3 or greater
- Firefox 3.5 or greater

Screen Resolution

A screen resolution of at least 1024 x 768 is required to make best use of the system.

Cookies

Cookies are used to keep login information and search parameters. The cookies are removed when the session expires or if the user logs out of the system.

JavaScript

JavaScript is used on some parts of the website to enhance functionality.

Administrative Users

There are two classes of user on the eTrace system: Primary Users and Secondary Users.

Secondary User

A secondary user is a standard user on the system. Secondary users can log in and perform searches but have no administrative rights. This is the default user type.

Primary User

A primary user is an administrative user on the system. Primary users can log in and perform searches with the same functionality as a secondary user. However primary users also have full administrative rights over all users under their account. There can be any number of primary users on one account, and each primary user has same level of administrative access.

Logging In

You will be provided with an initial username and password for logging into the eTrace system. Your username and password are case sensitive. Please ensure that you enter them exactly as they are supplied. Incorrect capitalisation is the most common problem when you are unable to log in.

Click the sign in button to bring up this screen

Then on the Sign in screen, enter your Username and Password and click the Log In button.

Initial Password Change

When you log in for the first time, you may be requested to change your password. In this case choose a new password which you will be able to remember. If you ever forget your password, then contact your eTrace Representative and they will be able to generate a new password for you.

Login Timeout

If you have left the system idle for a certain period of time, then you will automatically be logged out. This will become apparent when you see the Timeout screen and are requested to log in again.

Logged In

Once logged in as a primary user, you will see the same interface and be able to perform the same search functions as a secondary user. See the eTrace System Usage Guide for Search Users for information on how to use the search functions. The difference between Primary and Secondary users is in the Manage Account menu.

Primary users will have two additional options in the tool bar to select, "*Transactions"* and *"Manage Users",* as administrative users.

Change Account Details

To update details pertaining to your account you can do so by accessing the "Overview" menu button and editing the required data by clicking on the edit button as circled below in red:
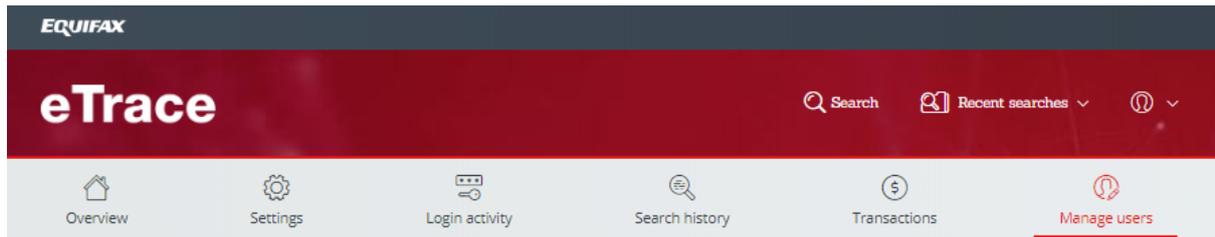

After you have edited the required details ensure you click on the red "Save changes" button.

Manage Users

The Manage Users screen allows you to add, edit and delete users on your account. It shows a list of your users with their name, login (username) and which department they are assigned to. From here you can also choose to add a new user or to add new users in bulk.

The Manage Users screen also has crucial information that will allow the primary user to monitor and manage the usage on their account. It will show:

1. The maximum number of (active) users on their account.
2. The number of users included in the pricing plan
3. The number of additional users (the account will be charged for these)
4. The total number of searches this month
5. The total search quota, based on the maximum number of users (including any additional users)
6. The % of the total search quota (so far) for the month.

EQUIFAX

eTrace

🔍 Search   📖 Recent searches ∨   ⓘ ∨

| Overview | Settings | Login activity | Search history | Transactions | Manage users |

Manage users

[+ Add new user] [Bulk upload users] [Download report]

This month
ⓘ Additional user charges will apply if the maximum number of users this month exceeds the number included in the pricing plan.

Maximum users	Additional users	Users included in this plan	Total searches	Total search quota	% of total search quota
12	11	1	0	6000	0.00%

Your pricing plan: BusinessPlan 1

12 Results   🔍 Search within

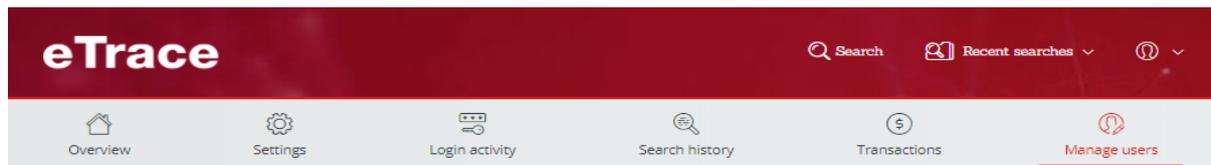| Name	Login	Department	Last login	Status	
Mr samtest2166 Test	samtest2166	Pegasus One	Never logggged in	Active	⚙
Mr samtest2167 Test	samtest2167	Pegasus Two	Never logggged in	Active	⚙
Mr samtest2168 Test	samtest2168	Pegasus Three	Never logggged in	Active	⚙
Mr samtest2169 Test	samtest2169	Pegasus One	Never logggged in	Active	⚙
Mr samtest2170 Test	samtest2170	Pegasus Two	Never logggged in	Active	⚙
Mr samtest2171 Test	samtest2171	Pegasus Three	Never logggged in	Active	⚙
Mr samtest2172 Test	samtest2172	Pegasus One	Never logggged in	Active	⚙
Mr samtest2173 Test	samtest2173	Pegasus One	Never logggged in	Active	⚙
Mr samtest2174 Test	samtest2174	Pegasus Two	Never logggged in	Active	⚙
Mr testabc11 testabc11	testabc11		Never logggged in	Active	⚙

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New User

To add in a new user click on the **+ Add new user** button. Fill in all the required sections of the online form as noted with an Asterix at a minimum. When filling out the User Profile information ensure that you click on the "Force user to change password on next login" to force the user to select their new password. When you have finished filling in the form click on save.

Add New Users in Bulk

The Add New Users in Bulk click on **Bulk upload users** in the manage users menu.

Follow the instructions on screen to firstly download and the fill in the .csv file and save this to a location you can access. Click on the "upload" button to finish the process.

Field	Detail
User Type	Primary or Single
Username	Max 64 Characters
Password	Max 255 Characters
Force user to change password on next login	Yes or No
Salutation	Max 5 Characters
First Name	Max 50 Characters
Last Name	Max 50 Characters
Email Address	Max 100 Characters
Phone	Max 20 Characters
Mobile Phone	Max 20 Characters
Status	Active, Inactive, Locked, Verify

Default Search Tab	Advanced or Couples
Search Field Auto-complete	Yes or No
Web Session Timeout (In Minutes)	Integer value
Department/Team	Max 80 Characters
Receive Email Update	Yes or No
Database Country Access	Au, NZ or all

Once you have uploaded the document you need to map the input files columns to eTrace service as follows for all the columns:

After you have uploaded the bulk users file you can check the status of the file in the upload history in the bulk upload users page. When the process has finished you will see a status of "Completed" indicating that these users have been set up.
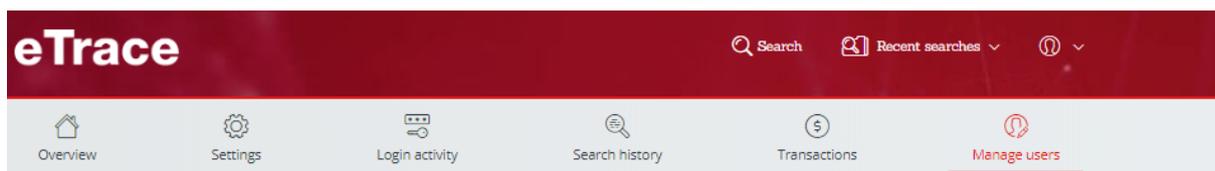
Upload history

Date	User	Result	Total Records
Mon 18 Mar 2019 at 14:53	Samuel PrimaryBusiness	Pending	0
Tue 29 Jan 2019 at 14:35	Samuel PrimaryBusiness	Completed	9
Mon 03 Dec 2018 at 15:22	Samuel PrimaryBusiness	Completed	0
Mon 03 Dec 2018 at 15:16	Samuel PrimaryBusiness	Error	9
Wed 14 Nov 2018 at 15:45	Samuel PrimaryBusiness	Error	9
Fri 09 Nov 2018 at 15:53	Samuel PrimaryBusiness	Error	9
Fri 09 Nov 2018 at 15:36	Samuel PrimaryBusiness	Error	9
Fri 09 Nov 2018 at 11:20	Samuel PrimaryBusiness	Error	1
Mon 05 Nov 2018 at 16:08	Samuel PrimaryBusiness	Error	4

Edit Users

From the "Manage users" page you can edit user details by clicking on the settings button outlined below:

Once you click on the button you can select the required option to either Edit a specific user, generate a new password or delete a user.

Edit User

Once you have selected the "Edit user" option you can change the following information for the specified user.

- Title
- First & Last name
- Email Name
- Phone number
- Mobile number
- Department
- User access
- User Status – Active yes or no
- User Type – Primary or Secondary
- Search auto complete – Yes or no
- Email notifications – On or off
- Default Search options
- Web Time out duration

Delete User

Once you have selected delete user you are promoted with the following pop up:
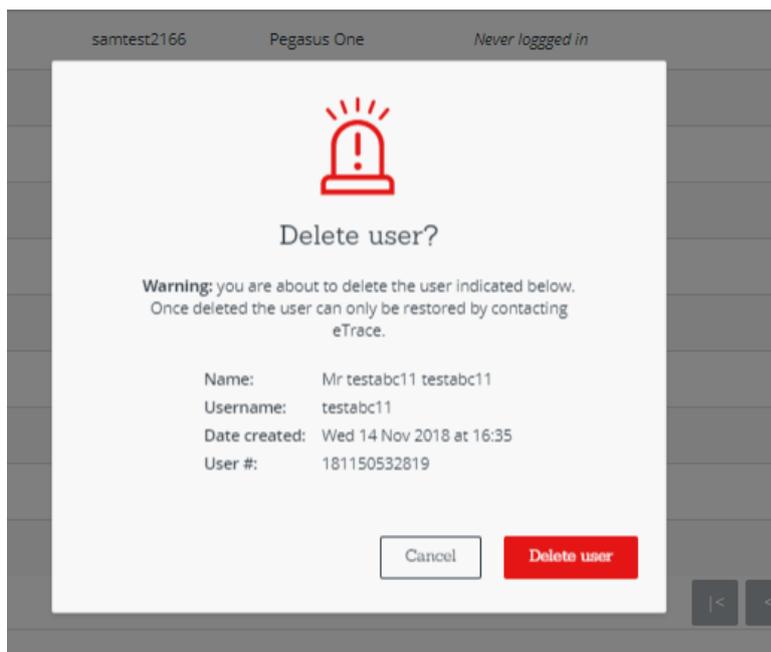
Choose from the two options to finalise the transaction.

Note – It is possible to recover a deleted user if done so in error. To recover a deleted user, please contact your Equifax representative.

Transactions

In addition to the "Login" in and "Search History" as a Primary user you are able to view current spend on your account. You can do this by clicking on the "Transactions" icon in the toolbar and then searching the transactions by date.

Searching

Refer to the secondary user guide for how to use eTrace for searching.

User Guidelines

Suggested usernames

Usernames need to be unique across the entire eTrace system. There are two preferred formats for usernames, however any unique username is acceptable.

Full Name username A username B

Mary O'Connor moconnor mary.oconnor

Force password change

Many companies start by setting the passwords on all of their users to one common and easy to enter password (for example blueshoe or 3apples) then checking the **Force Password Change** option for each user. That way each user is required to choose a new password when they first log into the system with the common password.

User Limits

There is no limit to the number of users under one account. The pricing plan for your account comes with a number of included users. You may exceed this number, but the account will be charged for the additional users.

Web Session Timeout

It is important to set the web session timeout for each user to a reasonable limit. A good starting point is 30 minutes. If the user is not performing any searches for that period of time, then they are automatically logged out of the system and their Access Seat is available to another user.