SOLVIT
User guide for local Administrators

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1 Introduction

1.1 Scope and purpose of this document

This document explains the administrative tasks that the SOLVIT Centre Local data administrators can carry out in the Internal Market Information (IMI) system concerning:

- Management of data their own IMI Authority (SOLVIT Centre)
- Management of users of their own SOLVIT Centre

1.2 Who are the local data administrators?

The Local data administrators are those users, who have been assigned 'Administrator' role in their own IMI authority. At least one user in each IMI authority must have this user role, but at the same time, multiple or eventually all users in an authority can have this user role.

SOLVIT Centres, technically speaking, are also IMI authorities, thus those centres, which only use IMI for SOLVIT, certainly have at least one team member, who has the 'Administrator' role.

Other SOLVIT centres, which apart from SOLVIT use the IMI System for different purposes, might not have a team member, who has the 'Administrator' role. This latter, however is a rather exceptional case and in practice, applies only to those centres, where the ministry or public authority hosting SOLVIT is also the National IMI Coordinator (NIMIC). If this is the case, all administrative tasks for the authority's and users' data management are carried out by the NIMIC, who provides support for all actions described in this document.

1.3 Checking who has the 'Administrator' role

To check if you already have the 'Administrator' role and to find out who has this role in your SOLVIT Centre, simply log on to IMI-SOLVIT.

- If in the menu you find the Administration option, you have the 'Administrator' role.
    - Click on this menu option and then on 'My authority' underneath. This will open a tab with the details of your authority displayed on 5 pages. In the 'Administrators' section of the last 'Management information' page you can check the list of users who have the 'Administrator' role.
- If in the menu you do not find the Administration option, it you do not have the 'Administrator' role. In this case, the simplest is if you contact the IMI Helpdesk or your National IMI Coordinator to find out who in your SOLVIT Centre has this role. They at any point can provide you with this information

1.4 Who should have the 'Administrator' role?

It is up to the discretion of Member States, SOLVIT Centres and National IMI Coordinators, who in a SOLVIT team is given the 'Administrator' role. The general recommendations are:

- Every IMI authority should have at least two users, who have 'Administrator' role
- Only permanent staff of IMI authorities should be assigned the 'Administrator' role. (e.g. trainees working only temporarily for an authority should not be given this role.)

2 Managing your Authority's data

2.1 Why

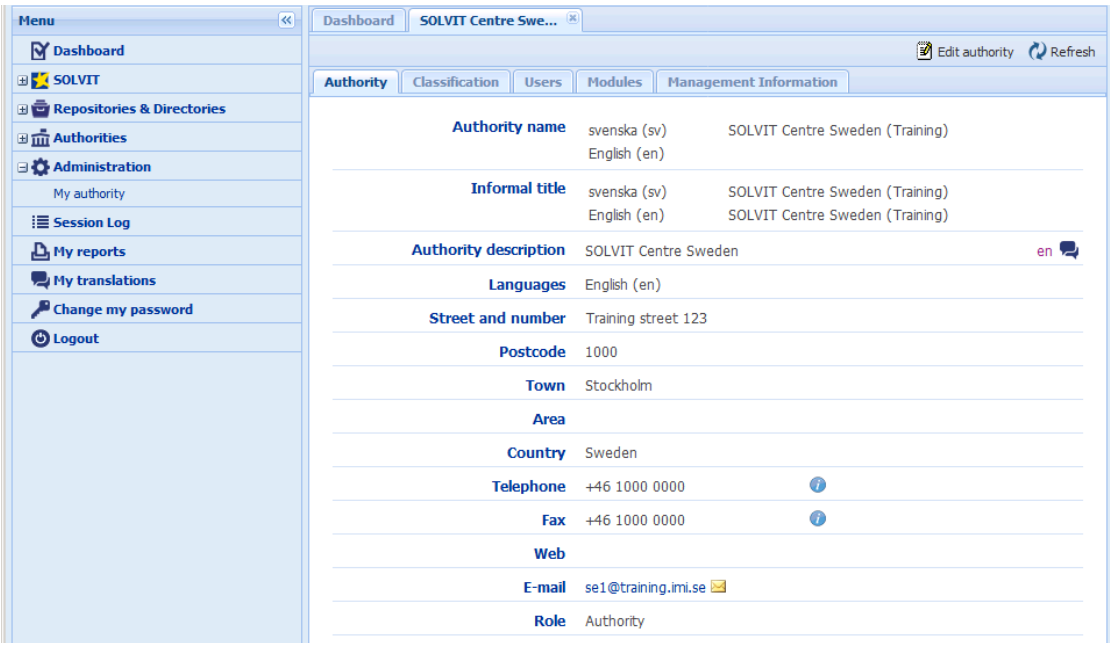
As an 'Administrator', you have the responsibility to keep the information about your authority in the IMI system as up-to-date as possible.

This will help users in other Member States to contact and find your authority easily. It will also ensure that automatic emails sent by the IMI system arrive to the correct email address.

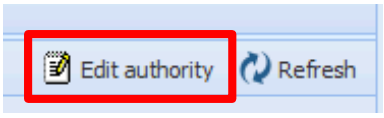
2.2 How

1. Log in into IMI
2. On the left, click on **Administration ▸ My authority**

You are now in the Authority tab. You should see the following screen, where information is displayed on 5 pages:



3. Click the **Edit Authority** button on the toolbar:



Note that the Edit authority button is only displayed on the first 'Authority' page.

4. Now, you can edit the information that you want to update in the Authority tab:

   - **Authority name**: official name of the authority in the official language/s of the Member State. This name is not translated into other languages.

     Providing the official name of your authority is part of your registration in IMI. After registration, you will not be able to edit your authority's official name. If it is incorrect, please advise the IMI coordinator responsible for your authority's registration. He or she can edit the name.

   - **Informal title:** name that clearly states what the authority does. This informal title is translated into all EU languages. In order to help others identify an authority in the system, the informal title should be short and clear.

     If you alter the Informal title significantly, tick the **box** underneath it. This informs the European Commission that the translation of the informal title in other languages needs to be updated.

   - **Authority description:** short profile of your authority in your official language. Here you can indicate, for example, whether your authority is local, regional or national, its main fields of activity and its tasks in these fields.

   - **Languages:** list here all the languages understood within your authority.

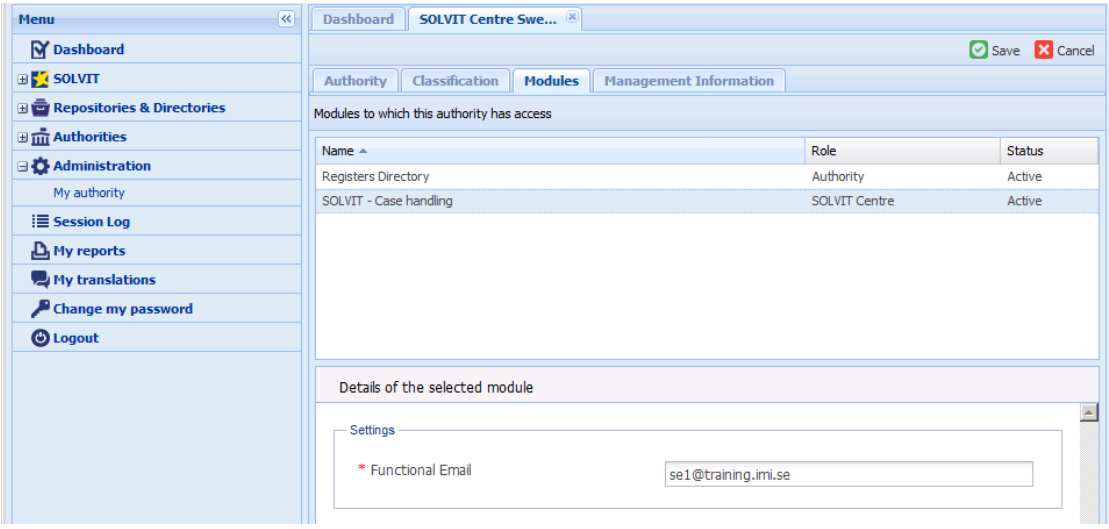
   - **Street and number, Postcode, Town, Country:** contact address of your SOLVIT Center. Remember to update it in case the office is moved.

   - **Telephone, Fax, Web:** basic contact data for your authority. Remember to update them as soon as possible in case of change.

   - **E-mail:** this email account must be checked regularly, as it will be used for important communications from the system to your authority.

   - **Role:** the role of your Authority is part of your registration in IMI. After registration, you will not be able to edit it. If it is incorrect, please advise the IMI coordinator responsible for your authority's registration.

5. Click on the **Modules** tab. You should see the following screen:



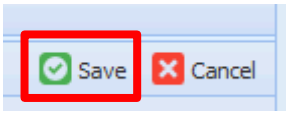
6. Edit the information that you want to update in the Modules tab:

- **Functional Email**: this is the address the address where the automatic emails are sent.

  You must keep the functional e-mail address up to date. The system uses this address to notify any relevant activity in the IMI system that concerns the authority. To update it:

  - Select the Module (**Register Directory** or **SOLVIT – Case handling**)
  - Edit the address in the **Functional Email*** text box

7. **Click the Save button on the toolbar to apply your changes!**



3 Managing your Authority's users

3.1 Why

You, as SOLVIT Center Administrator:

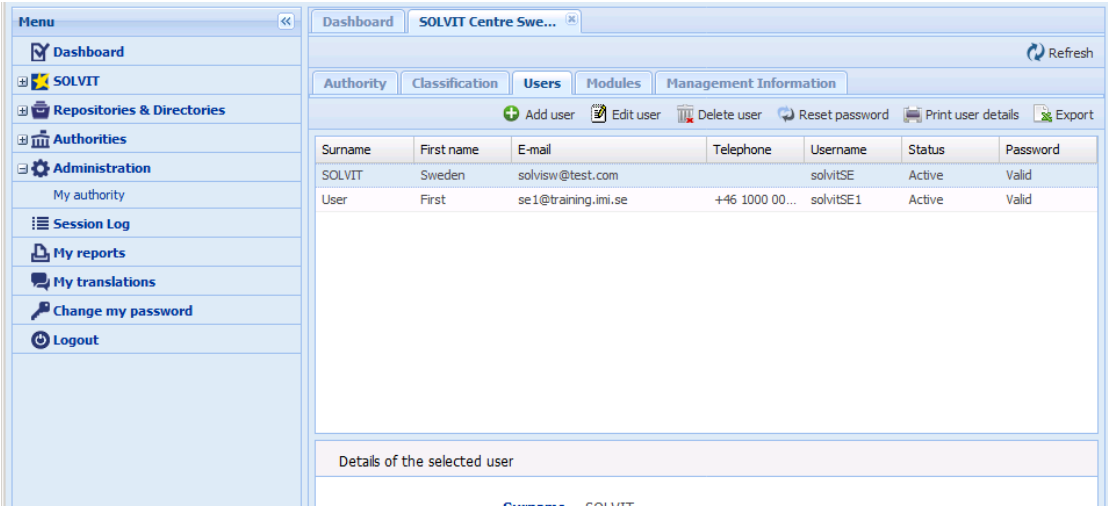
- have all the user rights available for the Modules to which the SOLVIT Center is granted access;
- are responsible for managing user rights for all other users of your SOLVIT Center; and
- can register new users. One of your top priorities is to register another colleague with Administrator rights as a back-up.

3.2 How

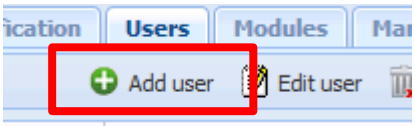
3.2.1 Registering a new user

1. Log in into IMI
2. On the left, click on **Administration ▸ My authority**

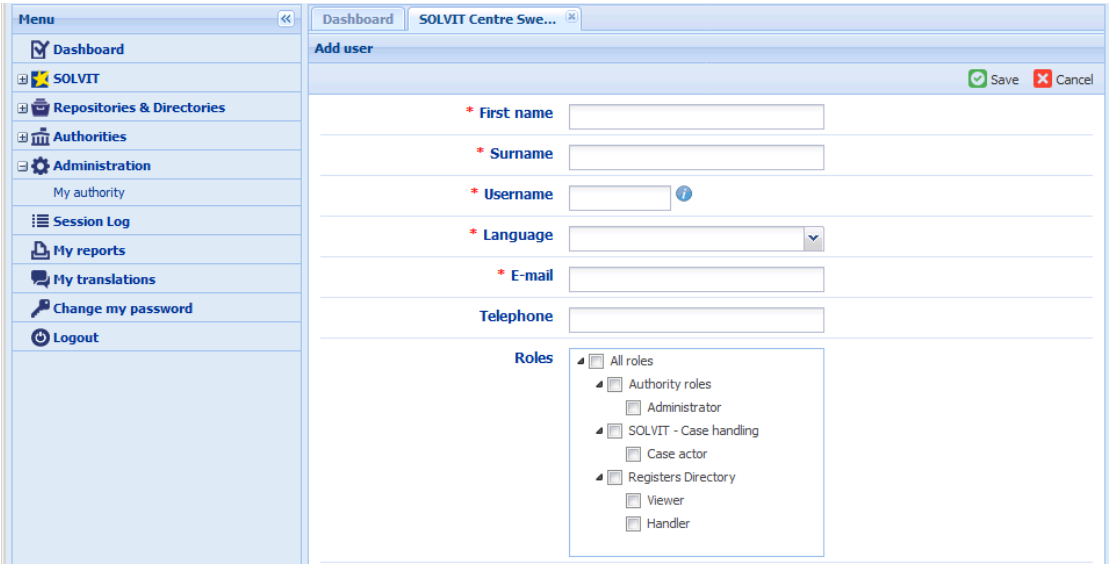
3. Click on the **Users** tab. You should see the following screen:



4. Click the **Add user** button on the top-right toolbar:



5. You should see the following screen:

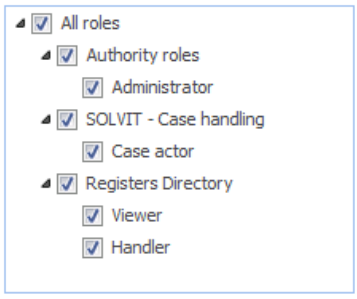
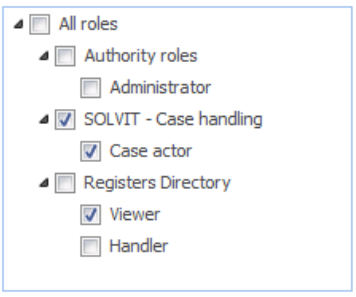


6. Enter the following data:

- **First name and surname**
- **Username:** The **username is generated automatically** by the system on the basis of the first name and the surname, but you can modify it as you please.

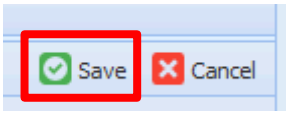
  The system will not accept usernames already in use in IMI!
- **Language:** preferred working language in which the user will receive all email communications from IMI.
- **E-mail**: office address that will receive all system-generated automatic notifications that involve this user.

  Each user must have a unique e-mail address. **You cannot register a new IMI user with the same e-mail address as an existing user!**
- **Telephone** number (optional)
- **Roles**: the select the modules and rights to be assigned to the new user, according to his role:

Role	New Administrator	New SOLVIT Case Actor
Setting		

Note: only permanent staff should be given Administrator rights! (i.e. no interns/trainees)

7. **Click the Save button on the toolbar to apply your changes!**



8. **Inform the new user about its username,** but not via e-mail, unless this is **encrypted** (for security reasons).

   Afterwards, the user will receive a **temporary password** via email. This could take up to 24 hours.

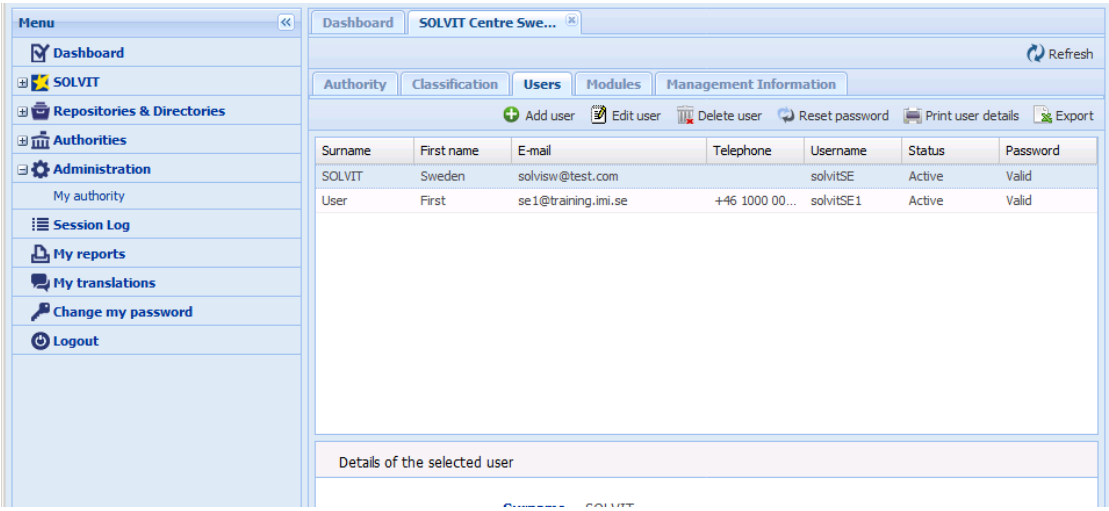
   At the first login, the user will be required to set a new password and a 12 digits security code. See chapter 3.2.3 for more information about the first log in.

3.2.2 Updating user's data

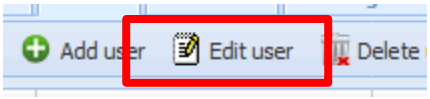
As an Administrator, you can modify any information about any user at any time.
This includes user names and user rights for each module. To do this:

1. Log in into IMI
2. On the left, click on **Administration ▸ My authority**

3. Click on the **Users** tab. You should see the following screen:



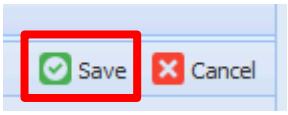
4. Click the **Edit user** button on the top-right toolbar:



5. Change any of the data about the user.

> **If you change the Username, remember to communicate the new Username to the user.**
>
> Afterwards, the user will receive a new **temporary password** via email.
>
> At the first login, the user will have to login with the new username following the procedure described in chapter 3.2.3.

6. **<u>Click the Save button on the toolbar to apply your changes!</u>**



3.2.3 Assisting the Users in the first log In

For your information, take a look at what the new users will have to do when logging in for the first time. In this way, it will be easier for you to help them, in case they get stuck.

1. Access the IMI login page:

EUROPEAN COMMISSION
INTERNAL MARKET INFORMATION SYSTEM
Important legal notice
English (en)
EUROPA > European Commission > Internal Market > IMI
Contact | Frequently Asked Questions
Login
Username
Password
Forgot your username/password?
Login
Privacy statement
IMI
Internal Market Information System
SOLVIT
Sistema
Binnenmarkt
Informationssystem
IMI-net
Mercado
Système
Información
αγορά
σύστημα
πληροφοριών
Ηλεκτρονικό
Информационна
Informationssystemet
Informatiesysteem
informazione
marché
interno
interior
intérieur
sur
пазар
вътрешния
Wewnętrznym
Wymiany
indre
interne
mercato
εσωτερική
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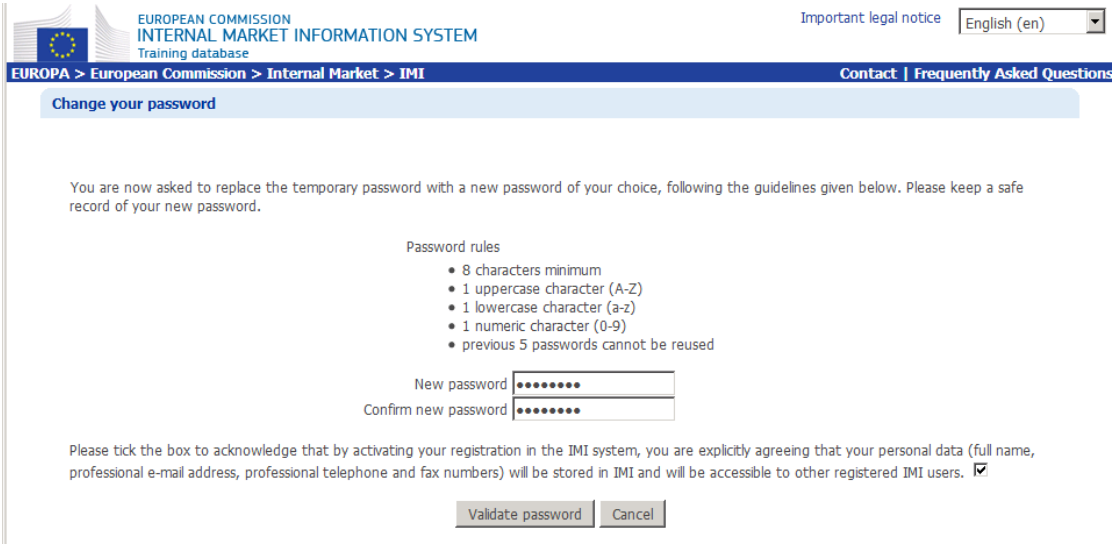
4. The system will ask the new users to change the temporary password to one of their choice.



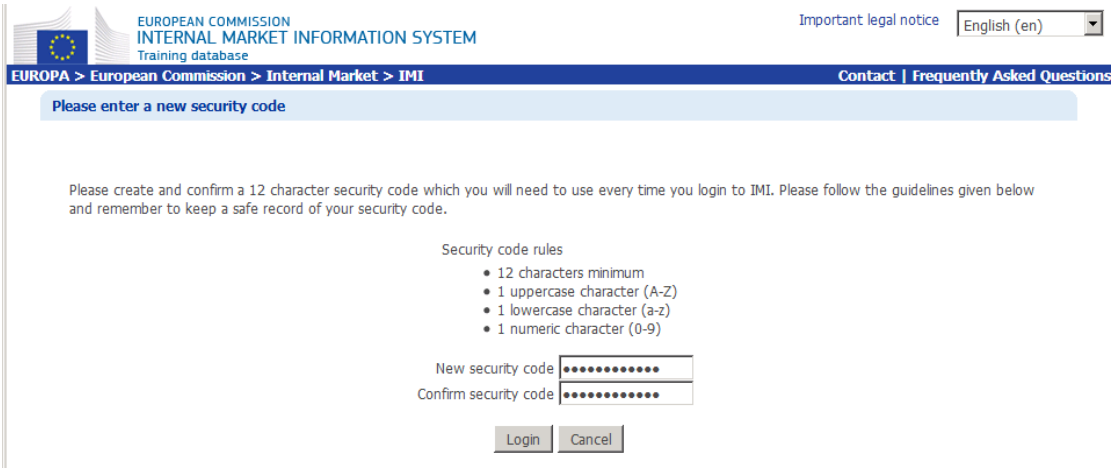
The user has to:

- fill the **New password** text box
- fill the **Confirm new password** text box with the same password
- check the Acknowledgement **checkbox**
- click on **Validate password**

Recommend to the user to:

- pay attention to the **capital letters**: usernames, passwords and security codes in IMI are case sensitive.
- **keep a safe record of this password.**
- **enter the username and the new password manually**, even if the fields on the login screen are prefilled.

5. The system will ask the new user to create and confirm a 12-character security code:



The user has to:

- fill the **New security code** text box
- fill the **Confirm security code** text box with the same code
- click on **Login**

Recommend to the user to:

- **keep a safe record of this security code.**
- set a **simple** security code that still meets the rules: e.g. 123456789Abc or 9999999999Aa – these will be easy to enter for subsequent logins.

6. Now the new user has successfully logged in.

   For subsequent logins, he will have to enter username, password and three randomly selected characters from the security code.

- If the users want **to store the password** in the browser, they have to log out and login once again with the newly set password, remembering to enter the username and newly set password manually.

  When browser asks to store the password, choose **YES**.

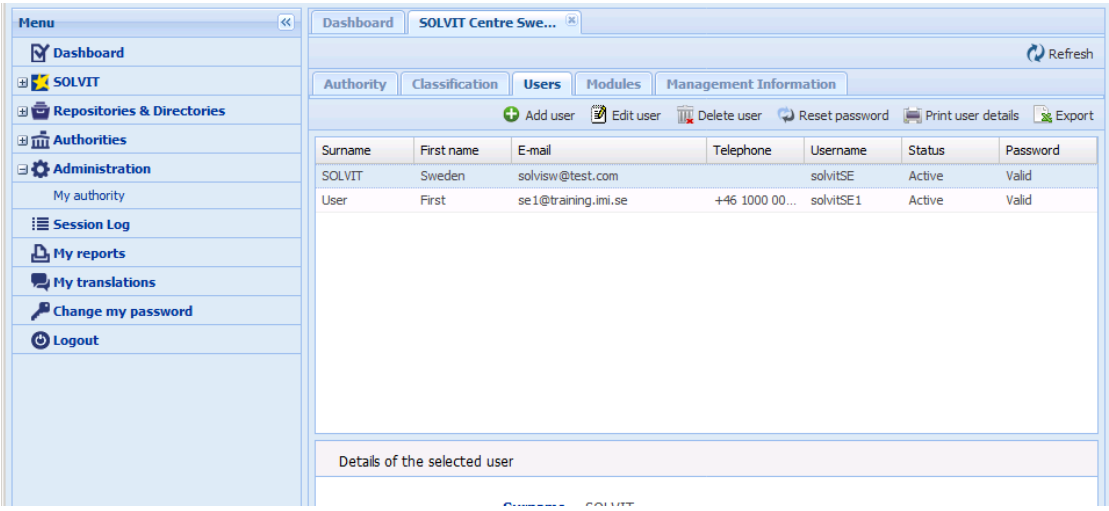
- After **5 failed login attempts**, the **user account is locked** and the user will have to ask you, the Administrator, to reset the password to regain access to the account.

  For information about the reset of the password, refer to the next chapter.

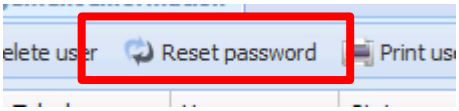
3.2.4 Resetting the password of a user

1. Log in into IMI
2. On the left, click on **Administration ▸ My authority**

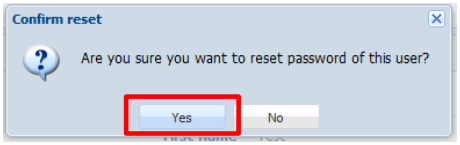
3. Click on the **Users** tab. You should see the following screen:



4. Select from the list the user whose password you want to reset.
5. Click the **Reset password** button on the toolbar:



6. Confirm the reset of the password:



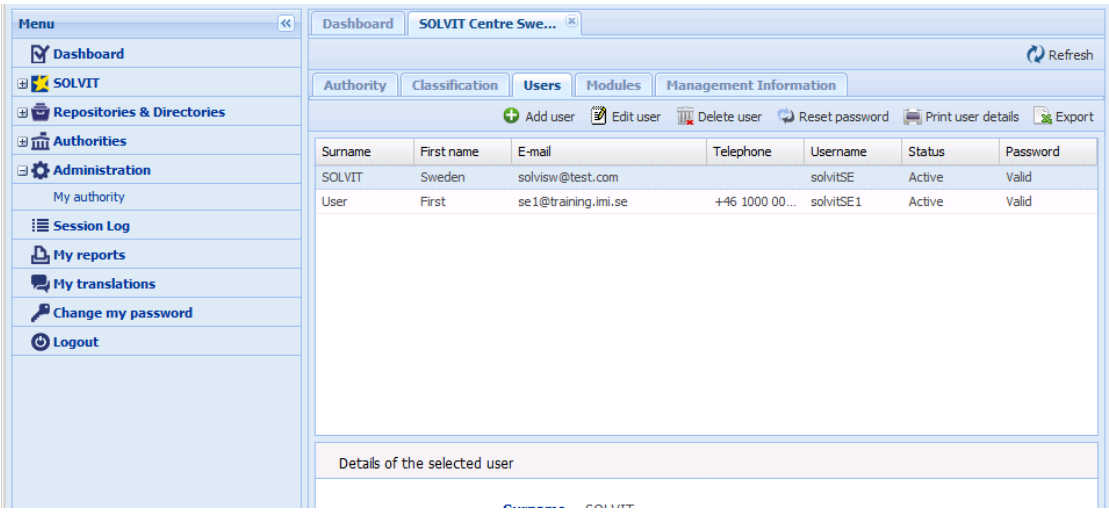
The user will immediately receive a temporary password, which he has to use to login in IMI following the procedure described in chapter 3.2.3.

3.2.5 Deleting a user

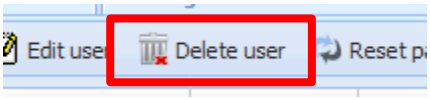
As an Administrator, you can delete the users that have left your SOLVIT Center. To do this:

1. Log in into IMI
2. On the left, click on **Administration ▸ My authority**

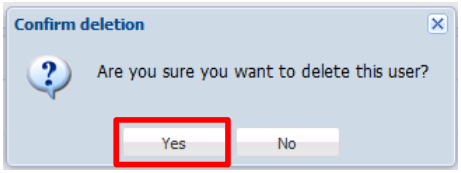
3. Click on the **Users** tab. You should see the following screen:



4. Click the **Delete user** button on the top-right toolbar:



5. Confirm the deletion of the user:



4 Troubleshooting

4.1 I forgot my username!

If you cannot remember your username, please contact a local data administrator in your authority. He or she will send you a username outside the system.

If you are the only local data administrator in your authority or if, for any reason, you cannot get in touch with your local data administrator and you have forgotten your username, please **contact your IMI coordinator** (the coordinator responsible for your authority's access to IMI) who will be able to assist you.

4.2 I forgot my password or my security code!

If you have forgotten your password or security code, please contact a local data administrator of your own authority. He or she will reset your password. You will then receive an automatic email with your new temporary password. You can now log in again as described in chapter 3.2.3.
If you have forgotten your password or security code and are the only local data administrator in your authority, please **contact your IMI coordinator**. He or she will reset your password. You will then receive an automatic email with your new temporary password. You can now log in as described in chapter 3.2.3.

5 Further support

SOLVIT:

http://ec.europa.eu/solvit/

EC SOLVIT TEAM:

solvit@ec.europa.eu

IMI HELPDESK:

imi-helpdesk@ec.europa.eu

NATIONAL IMI COORDINATORS:

http://ec.europa.eu/internal_market/imi-net/contact/index_en.htm

IMI WEBSITE:

http://ec.europa.eu/internal_market/imi-net/