

## SES Account Administrators - Your Turn Exercises

Using the login credentials attached to the SES Training - Welcome email, log into the SES Training Environment and complete the exercises below. Keep in mind that practicing in the SES Training Environment provides you with an excellent opportunity to get a feel for the real SES Production environment. After completing the exercises, feel free to return to the Training Environment as needed to refresh your memory. However, be mindful to not share any sensitive data such as personal contact information or sensitive documents. If you need help or have any questions, please email

[SESTraining@csbs.org](mailto:SESTraining@csbs.org).

### Exercise 1: Managing Agency Profile

#### Related Article(s):

[Managing Agency Profile](#)

1. Log into the [SES Training Environment](#) as an Account Administrator.
2. Click the **Manage Agency Profile** button and then **Manage Agency Supervision**.
  - a. Update an existing Business Type and corresponding Business Activities. (Multiple Business Activities can be selected for each Business Type.)
  - b. Add an additional Business Type and corresponding Business Activities.
  - c. Remove a Business Type and its corresponding Business Activities.
3. Click **Update Agency Supervision**.
4. Navigate to the **Email Domains** page and update the acceptable domains by clicking **Manage Domains**.  
**NOTE:** Only those email addresses with the domains listed on the Email Domains page are accepted by the system. In exercise 2, you will be asked to add two new users. Add the email domains for the email address you plan to use for those two new fictitious users, e.g., outlook.com or gmail.com.

**Summary:** In exercise one, for this agency, you set the business types and business activities that the agency will focus on during its examinations. If your agency adds or removes business types and business activities that it supervises, be sure to update this page.

### Exercise 2: Creating and Removing User Accounts

#### Related Article(s):

[Creating Agency Users](#)

[Removing Agency Users](#)

1. Log into the [SES Training Environment](#) as an Account Administrator.
2. Navigate to the **Agency Users** page and add two new fictitious users.  
**HINT:** Click **Manage Users** → **Create New User**.
  - a. Give one user the role of staff director and give them access to SES Consumer Complaints (View Only). Remember to use one of the approved email domains from the last exercise.
  - b. Give the other user the role of examiner and staff director.
3. Remove one of the new users you created. **DO NOT** remove any other users from the system.  
**NOTE:** If a user holds the EIC or Reviewer roles on an active supervisory activity, they cannot be removed from SES.

4. Reactivate the user you just removed. Assign any role(s) to the user.

**Summary:** In exercise two, you practiced adding and removing users. You also assigned roles to each user. The system-level roles available to the Account Administrator differ from the roles available at the Supervisory Activity level. Once an AA removes a user, they can reactivate the user.

### Exercise 3: Managing User Accounts

#### Related Article(s):

[Managing User Accounts](#)

1. Log into the [SES Training Environment](#) as an Account Administrator.
2. Navigate to a user account that you created.  
**HINT:** Click **Manage Users**, then search for the user you created by last name.
3. Make changes to the user's profile.

Richard Mayhew MANAGE USER REMOVE USER

**ACTION**

- Update User Profile
- Update Roles and Groups
- Reset Password
- Unlock Account

CANCEL NEXT

- a. Update the user's phone number.
  - b. Add a middle name.
5. Update the user's role.
  6. Reset the user's password.

**Summary:** In exercise three, you practiced updating the profile of an individual user. You also learned how to update the user's role(s) and reset their password.

#### Additional Helpful Article:

[Verify Agency Users](#)

Every month, the Account Administrators at each agency must verify its users in SES. This task displays the last time a user accepted the Terms of Use, which gives the AA a gauge of the frequency with which users access SES. CSBS expects AAs to review their agency's existing users and remove access for anyone that no longer needs it.

The SES Account Administrator is an important role. It is the responsibility of each agency's account administrator to ensure that only authorized users within your agency have access to SES. As staff changes occur in the agency, their SES accounts should be updated or provisioned accordingly. This monthly task helps ensure this important AA task is completed.