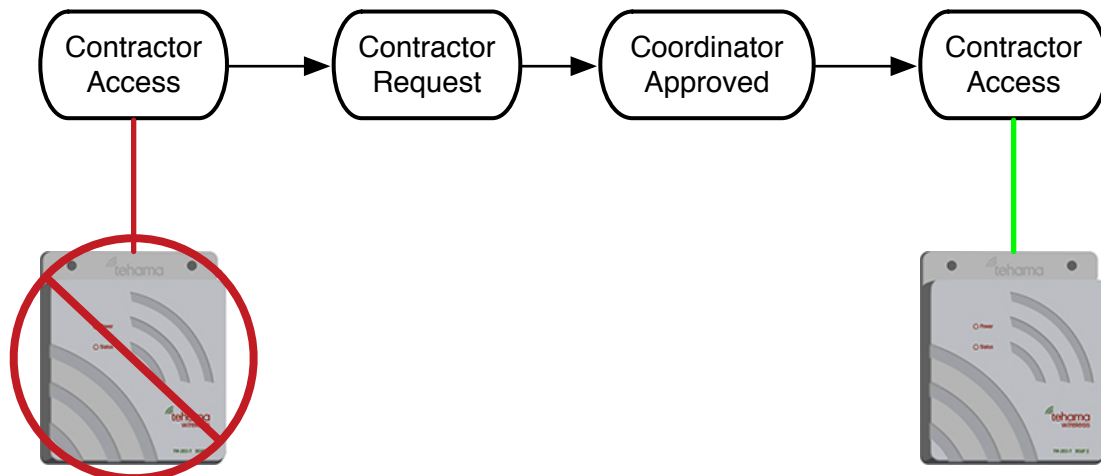


AN-118U - Using Grants

Grants Overview

Grants are the mechanism for third party entities to gain access to a Tehama DCAP. Instead of using the cituser login as the primary way for most field technicians to access Tehama DCAPs, you would now request and use a Grant. There is no password associated with a Grant user, but instead the access is managed by the RBC's account coordinators responsible for their DCAPs in the field. Coordinators will be able to immediately grant, extend, or revoke Access Grants with granularity down to the individual DCAP and user level. Access Grants also have an expiration date associated with them, which can be as short as the current day to as long as one year.



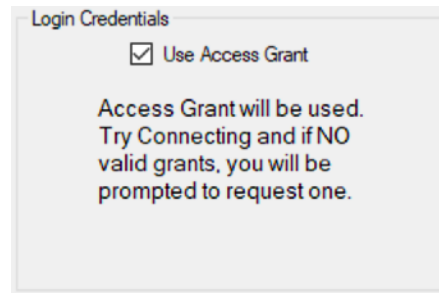
A field technician wanting access to a DCAP will make an Access Grant request for a specific DCAP using our CIT software or our Mobile App. Within seconds the coordinator, also using the CIT, will scan for new Access Grant requests and can approve it. Once it is approved, the field tech will be able to use the Grant to connect to the DCAP for the amount of time approved by the Coordinator.

This system works for both on-line and off-line DCAPs if you are using the CIT, though the Access Grant request and approval process does require the user requesting the grant to be connected to the internet using a hotspot or the property internet during the Request and Approval phases.

Access Grants are tied to your Site List login account and should not be shared with others. Grants can be revoked at any time by the Grantor, usually the RBCs.

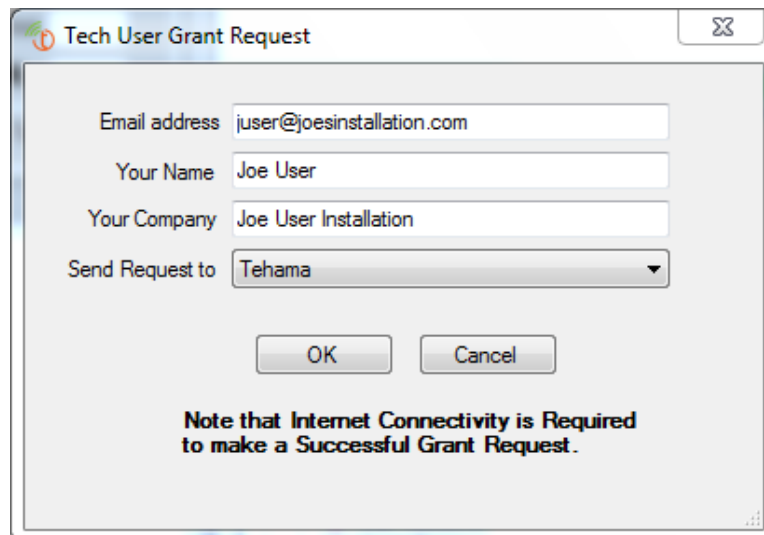
Using Grants

Field technicians that need to request access to a new DCAP can do so by creating a Site Entry (or editing an existing Site Entry) and checking the “Use Grant” box.



Then “Save” the entry and try to connect to the site. If you already have a valid Access Grant to this company’s DCAPs, you will be connected immediately. If not, then the Grant Request window will pop up.

The Grant Request window prompts you to enter your name, email, and company affiliation if any (that is, the company you work for, not the RBC). Once you enter this information the first time, the CIT will remember these fields for subsequent grant requests. Grants Requests are sent to the various RBCs, and the *Send Request to* field should be auto-populated with the RBC currently managing your target DCAP. In certain cases Tehama may need to issues grants so this is always an option in the *Send Requests to* drop-down. If you select Tehama you must contact us so we know to look for your grant request. Click OK to send the request to that RBC’s Coordinator team.



If you need immediate access, you can be on the phone with the RBC Coordinator as you make the grant request, and they will be able to process the grant in real time. As soon as the Grant has been processed, you will have access to the DCAP. You do need to be connected to the Internet while the RBC is approving your Grant, but will need to be in order to to acquire and use the Grant.

Usually Grants are allocated to a single DCAP or Site. RBCs do have the option to grant you a Global Grant to all their properties. You will have to discuss your need for a Global Grant with the RBCs.

The Access Grant database is checked every time you attempt to connect to a DCAP with the Use Grant check-box checked. This will ensure you use the most recent Access Grants. Access Grants are also saved locally in the CIT so you are able to use them if you are off-line and need to access a DCAP that is also off-line (i.e. no internet at the property but and you are using a portable router and an IP address instead of the Access Code).

Mobile App

In the mobile app, the Grant request will look like this. Slide the switch on if you want to use a Grant to access the site.

Edit Site Cancel Save

Name

Access Code 10110902112

Use Access Grant

Access grant will be used. Try Connecting and if there are NO valid grants, you will be prompted to request one.

If you don't have a Grant for that site, you will be prompted to request one just like happens in the CIT software.

TechUser Grant Request

[Cancel](#) [Send](#)

juser@joeinstallation.com

Joe User

Joe User Installation

Send to:

AMPS

AMS

AppFolio

Once you fill out the information and select the appropriate billing company, the grant request will be sent. Just like with the CIT, you can be on the phone with the company and they can enable the Grant in real-time so you have immediate access to the DCAP.

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