Client Administrator User Guide

PermiTrack$_{MS4}$

NPDES Storm Water Permit Tracking

Release 4.1.0

SEH Client Access Point – Technical Support

For assistance with technical questions and/or issues regarding the applications on the SEH Client Access Point, we offer product support Monday through Friday, 7:00 a.m. to 5:00 p.m. (CST), excluding major holidays.

Support is available via e-mail or phone at 612.333.2123.

If a support technician is not available at the time of your call, please leave a message on voicemail.

When sending an e-mail or leaving a voicemail, be sure to include your name, contact information, the application you are using, and a brief description of the question and/or issue you are inquiring about.

Be sure and check the FAQ page for answers to Frequently Asked Questions. Our support technicians will update this page regularly with questions submitted by other users.

For content-specific assistance with any of the Client Access Point applications, feel free to contact the appropriate staff person identified on the Contact Us page.

Contents

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Getting Started

Administration is a feature within your SEH website that lets the Client Administrator add users, change passwords, control permissions, and maintain contact information. Individual users can also log in to change their own password.

Logging in to the Administration tab

The Administration tab is available when you log in to your SEH client site. To log in to the Administration tab:

1. Open your web-browser on a computer.

2. In the address field, enter the web address for your SEH client site.

3. On the Welcome page, click the Client Login link.

4. On the login page, enter your user name and password.

5. Click the Administration tab.

See the following sections for more information about the Administration module:

- **Client Administrator**: *Quick Start Reference* on page 7 and Administration tab on page 9.

- **SEH Administrator**: See *SEH Administrator Addendum for the Administration Module* (a separate document).

What is on the Computer Screen?

The image below shows the main parts of the **Administration** computer interface. For more detailed information, see the description of each page in later sections of this document.
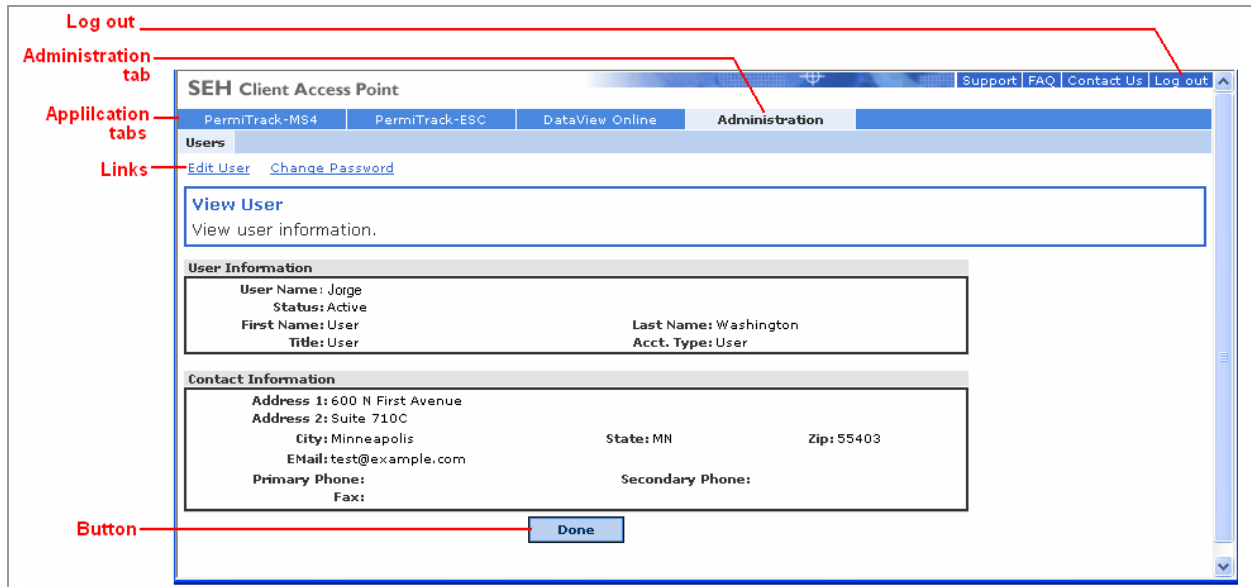
Log Out

Click the Log Out link to close the application and log out of the website.

Administration Tab

Click the Administration tab to go to the Administration module. Use this module to change your password [for all users] or set up users and contacts [for the administrator only].

Application tabs

The application tabs take you to your SEH Client Access Point applications or modules. For example, click the PermiTrack-MS4 tab to begin working with your storm water records.

Note: The tabs available depend on the application used at your organization or company. You may not have all of the tabs displayed or mentioned in this guide.

Links

The links across the top of each page let you set edit existing items, create new records, or go to a different view.

Button

At the bottom of the page, you generally find a button for saving your changes or canceling without saving. The pages showing lists of items generally do not include buttons.

Quick Start Reference

The following procedures take you through some of your common tasks. For more detailed information on the pages and fields on those pages, see the sections of this document that follow.

Adding a User

If a new employee joins your organization, create a user account through the Administration module:

1. Log in to the Client Access Point.
    (See *Logging in to the Administration tab* on page 5 for more detailed information.)

2. Click the Administration tab in the row of tabs near the top of the page.

3. On the View Client page (on page 9), click the Users tab.

4. On the User List page (on page 17), click the New User link just below the row of tabs.

5. On the Create User page (on page 18), record the person's name and address.

6. Select User from the Account Type drop down list.

7. Give the person access to PermiTrack-MS4 by selecting the check box.

8. Click the Create User button to save your changes.

9. On the View User page (on page 20), click the Change Password link below the row of tabs.

10. On the Change Password page, (on page 22), enter a new password for the user and retype it in the Confirm Password field.

11. Click the Change Password button to save your changes.

12. Give the user their new login user name [displayed on the View User page (on page 20)], and the password that you just assigned.

Changing a User's Password

If a user has forgotten their password or you need to change it for security reasons, you can reset or change a user's password:

1. Log in to the Client Access Point.
    (See *Logging in to the Administration tab* on page 5 for more detailed information.)

2. Click the Administration tab in the row of tabs near the top of the page.

3. On the View Client page (on page 9), click the Users tab.

4. On the User List View page (on page 17), click on the user's name in the list.

5. On the View User page (on page 20), click the Change Password link.

6. On the Change Password page (on page 22), enter the user's old password and new password.

7. Click the Change Password button to save your changes.

   The user will use this new password the next time they log in.

Add a Contact

The list of contacts is available through the PermiTrack-MS4 application, and can be used for reference.

1. Log in to the Client Access Point.
   (See *Logging in to the Administration tab* on page 5 for more detailed information.)

2. Click the Administration tab in the row of tabs near the top of the page.

3. On the View Client page (on page 9), click the Contacts tab.

4. On the Contact List page (on page 27), click the New Contact link under the row of tabs.

5. On the Create Contact page (on page 28), record the contact's organization, address, and phone.

6. Select the contact's type in the Contact Type section near the bottom of the screen.

7. Click the Create Contact button to save your changes.

Administration tab

The Administration application is used to:

- Set up accounts for the people who use your SEH applications.

- Record contact information that may be displayed in other applications.

Opening page

When you login in to the SEH Client Access Point, it opens to one of your organization's application pages. To administer your site's account, click the Administration tab in the upper part of the screen.
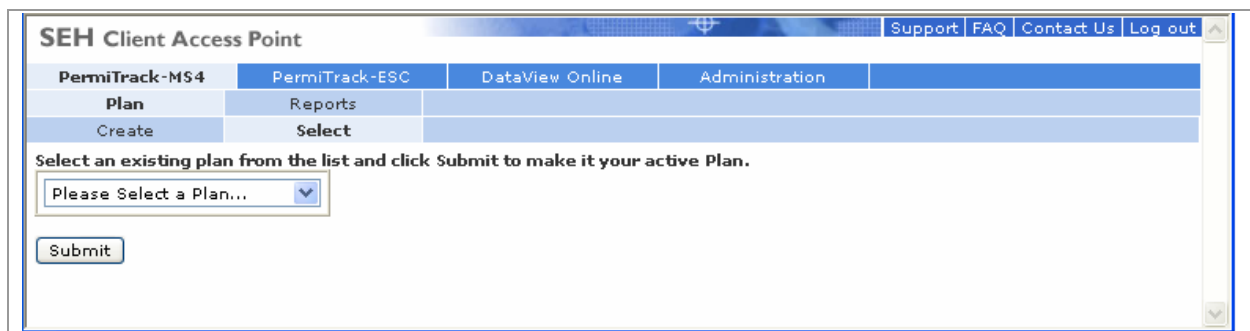

Figure 1. Opening page

View Client page

On the Client View page, you can review your client information, including your organization's contact information and the SEH applications you use. From this page, use the links above the information sections to edit the client information, or click the tabs to setup users or contact people.

The View Client page opens when you click the Administration tab on the opening page (above).

Figure 2. View Client page

Information Displayed on the View Client page

Information on the View Client page was entered when your organization's site was created. For descriptions of these sections, see the Edit Client page (on page 11).

Links and Button on the View Client page

The following links and button are available below the tabs on the Client View page:

- **Edit Client**: Opens the Edit Client page (on page 11), where you can update the client information.

- **DataView**: View setup information for the DataView Online application, if your site uses this application.

- **PermiTrack - ESC**: View setup information for the PermiTrack-ESC application, if your site uses this application.

- **Logo**: Opens the Logo page (on page 14) where you can choose a graphic file with your client logo for display on reports generated with the Client Access Point applications.

- **Done Viewing Client**: This button is not used by the Client Administrator. Click one of the links or tabs to go to a different part of the Administration module, or to open one of the other applications.

Tabs on the View Client page

- **Clients tab**: Return to the View Client page from one of the other tabs.

- **Users tab**: Opens the User List where you can add a new user or update information for an existing user.

- **Roles tab**: Note: roles are not applicable for this application.

- **Contacts tab**: Opens the Contacts List where you can edit an existing contact record or add a new contact.

Edit Client page

On the Edit Client page, you can update the contact information and general information for the selected client. After your site has been set up, you will rarely need to update this information.

The Edit Client page opens when you click the Edit Client link on the Client View page (on page 9). You return to the Client View page when you click either the Update Client button or the Cancel button.
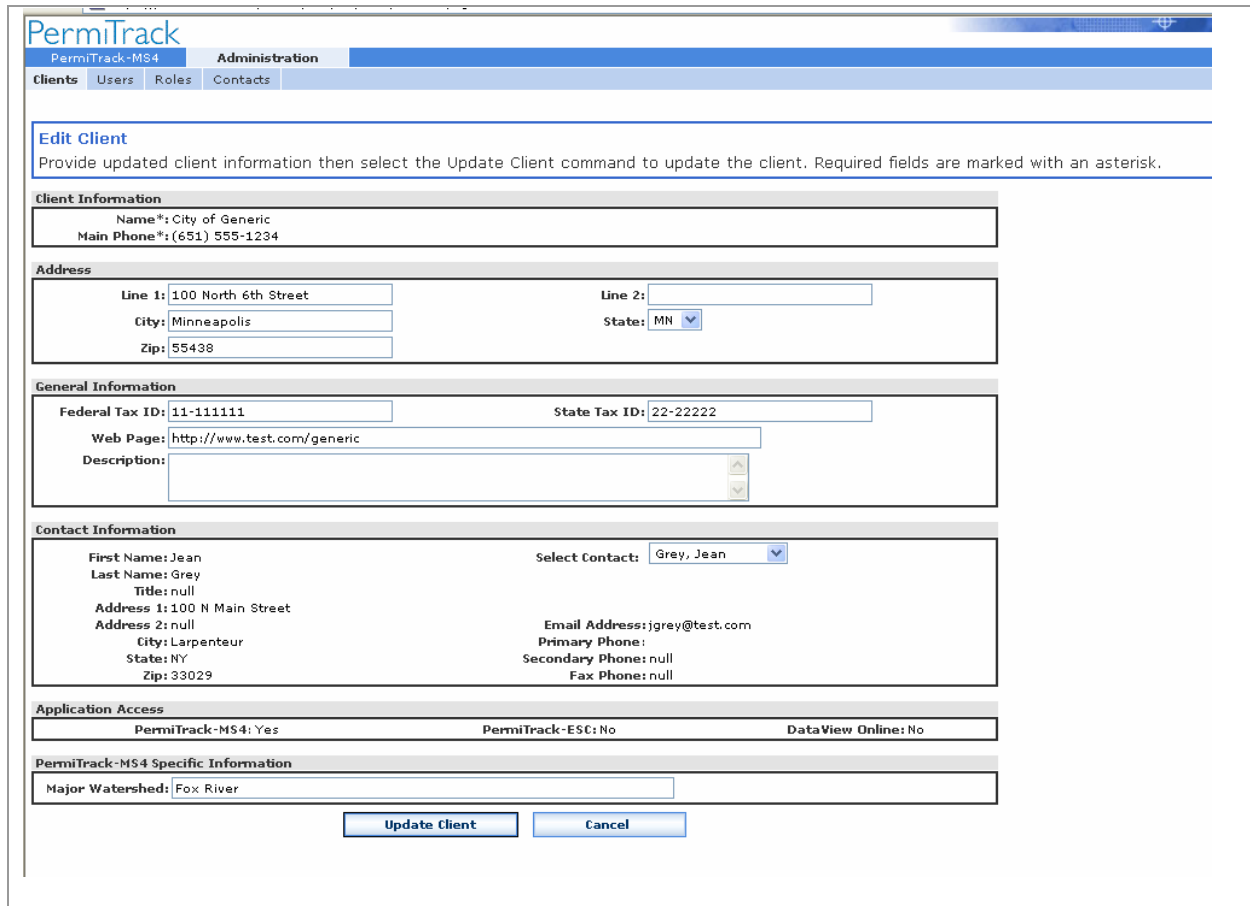
Figure 3. Edit Client page

Fields on the Edit Client page

View or update the following client information on this page.

▪ **Client Information**: The fields in the Client Information section can only be edited by your SEH Administrator.

— **Name**: Name of the client agency, company, or organization.

— **Main Phone**: The main phone number for the client or phone number for the client's headquarters or primary office.

▪ **Address**: Update the client's address in the Address section.

— **Line 1 & Line 2**: Line 1 and 2 of the client's mailing or street address. For example, the street, suite number, or P.O. box.

— **City, State, Zip**: City, state, and zip code for the client's mailing or street address.

- **General Information**: Edit the client's tax IDs or website information in the General Information section.

    – **Federal Tax ID**: Client's Federal Tax ID, if applicable.

    – **State Tax ID**: Client's State Tax ID, if applicable.

    – **Web Page**: URL for the client's web site. For example www.acme.com

      Note: This web address is not used for the client access site if you use PermiTrack-MS4. That address is set by the SEH Administrator.

    – **Description**: Additional descriptive information or notes that you want to record.

- **Contact Information**: Review the contact information or select a different primary contact in the Contact Information section. This section is generally used to record information for the Client Administrator, who serves as the primary contact for SEH, and for users needing help.

    – **First Name & Last Name**: First and last name of the primary contact person for the client.

    – **Title**: Job title or position of the contact person within the client organization.

    – **Address 1 & Address 2**: Lines 1 and 2 of the contact's mailing or street address.

    – **City, State, & Zip**: City, state, and zip code for the contact's mailing or street address.

    – **Email**: Contact's email address.

    – **Primary Phone**: Contact's primary or preferred phone number.

    – **Secondary Phone**: Secondary phone number for the contact, for example a cell phone.

    – **Fax Phone**: Phone number where the contact receives faxes.

    – **Select Contact**: This field shows the name of the primary contact for the client. Click the drop-down list to select a different name. The drop-down list includes the names of users who are designated as Client Administrator for the current site.

      If you select a name in the list, this person is saved as the primary contact when you click the Update Client button at the bottom of the page.

- **Application Access**: The Application Access indicates which applications are available to the client.

  - **PermiTrack-MS4**: If Yes appears next to PermiTrack-MS4, the PermiTrack-MS4 application is available to users at the client site.

  - **PermiTrack-ESC**: If Yes appears next to PermiTrack-ESC, the PermiTrack-ESC application is available to users at the client site.

  - **DataView**: If Yes appears next to DataView Online, the DataView Online application is available to users at the client site.

- **PermiTrack MS4 Specific Information**: This text box displays the major watershed specified for the client's application.

Buttons on the Edit Client page

- **Update Client** button: Click the Update Client button to save the changes you made on this page. The updated client record is saved, and you return to the Client View page.

- **Cancel** button: Click the Cancel button to discard or delete any changes on this page, and return to the Client View page.

Logo page

On the Logo page, you can choose a graphic file with your client logo for display on reports generated from the Client Access Point applications. If you do not choose a logo, the SEH logo is displayed.

The Logo page opens when you click the Logo link below the tabs on the View Client page (on page 9).

Figure 4. Logo page

Fields & Button on the View Client Logo page

- **Select an image file** field: The name of the logo file is displayed in the text box. This logo is displayed on your reports.

- **Browse** button: Click the Browse button to search for the image file that you want to use for the site logo. The file name is displayed in the text box.

  The graphic file must be a .JPG, .GIF, or .PNG.

- **Save Logo** button: Click the Save Logo button to save the file you chose. This file is now used for the logo on your website.

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Users tab

User List page

The User List page lists all of the users set up for your client site. These users have permission to view or interact with applications on your Client Access Point site.

The User List page opens when you click the Users tab at the top of the Client View page (on page 9).
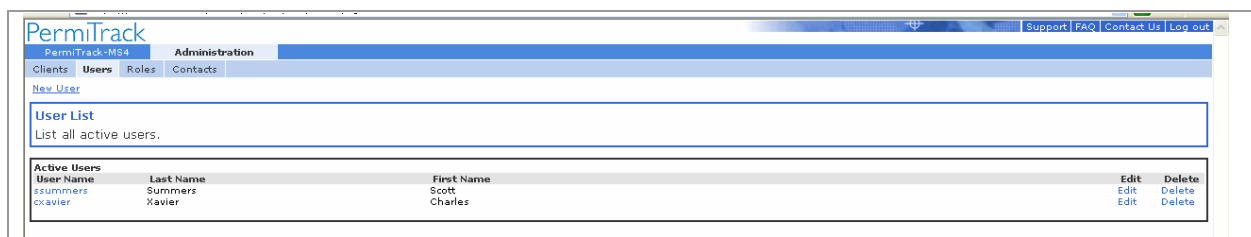
Figure 5. User List page

Links on the User List page

Use these links to view or modify the information and settings for a specific user.

- **New User**: Click the New User link just below the tabs to add a user to the current client. The Create User page (on page 18) opens.

- **User Name**: Click a name in the User Name column to view that person's record. The View User page opens (on page 20)

- **Edit**: Click the Edit link at the end of a user's row to edit or update the record for that user on the Edit User page (on page 21).

- **Delete**: Click the Delete link at the end of a user's row to remove that user. The Delete User page opens (on page 23).

Create User page

On the Create User page, record contact information for a new user and give them access to the Client Access Point applications. This user is now displayed on the User List page (on page 17). After setting up a user on this page, you can set their password on the Change Password page (on page 22).

The Create User page opens when you click the New User link on the User List page (on page 17).
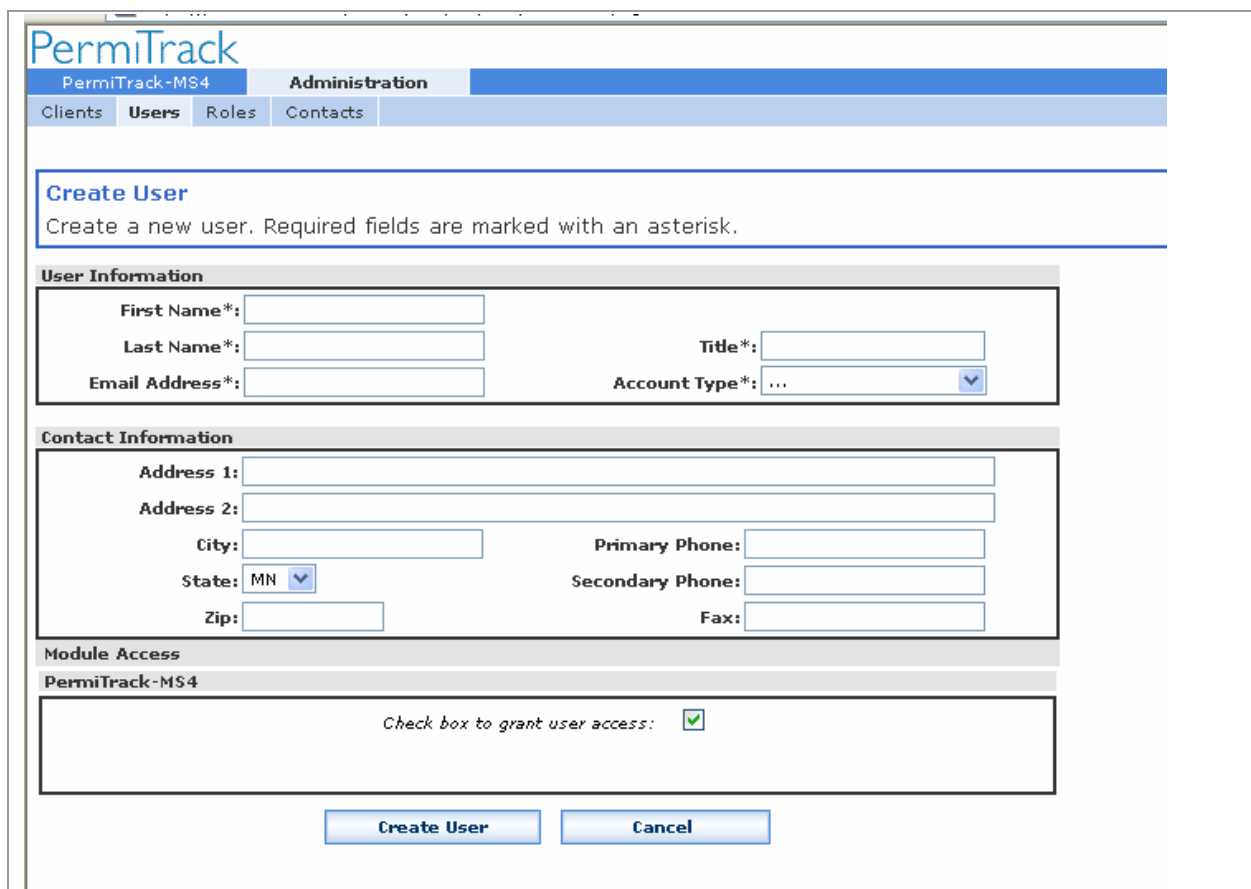
Figure 6. Create User page

- **User Information**: In the User Information section, record contact information for the person you are adding as a user. These fields are available.

  - **First Name & Last Name**: First and last name of the user who will use the account.

  - **Title**: Job title or position of the user within the client organization.

  - **Email Address**: User's email address.

— **Account Type**: Select an Account Type to indicate the type of access you are granting to this user.

Client Administrator: The Client Administrator has permission to set up users and make other changes in the Administration application. This role is generally assigned to only one person at the client site.

User: A User can be granted access to the PermiTrack-MS4 application set up for your client site.

After recording this person's contact information and assigning a password, the User account has access to this Administration application only for changing their password and contact information.

- **Contact Information**: Record the user's street and e-mail addresses, and phone numbers in the Contact Information section. This information is for your reference.

  — **Address 1 & Address 2**: Lines 1 and 2 of the user's mailing or street address.

  — **City, State, & Zip**: City, state, and zip code for the user's mailing or street address.

  — **Email**: User's email address.

  — **Primary Phone**: User's primary or preferred phone number.

  — **Secondary Phone**: Secondary phone number for the user, for example a cell phone.

  — **Fax**: Phone number where the user receives faxes.

- **Module Access**: Give access to the site management applications through the Module Access section.

  — **Check box to grant user access**: Select the check box to let this new user login to and use the PermiTrack-MS4 application. This user must also have a password set up on the Change Password page (on page 22).

  ☑: This user has access to the PermiTrack- MS4 application, as part of their Client Access Point login.
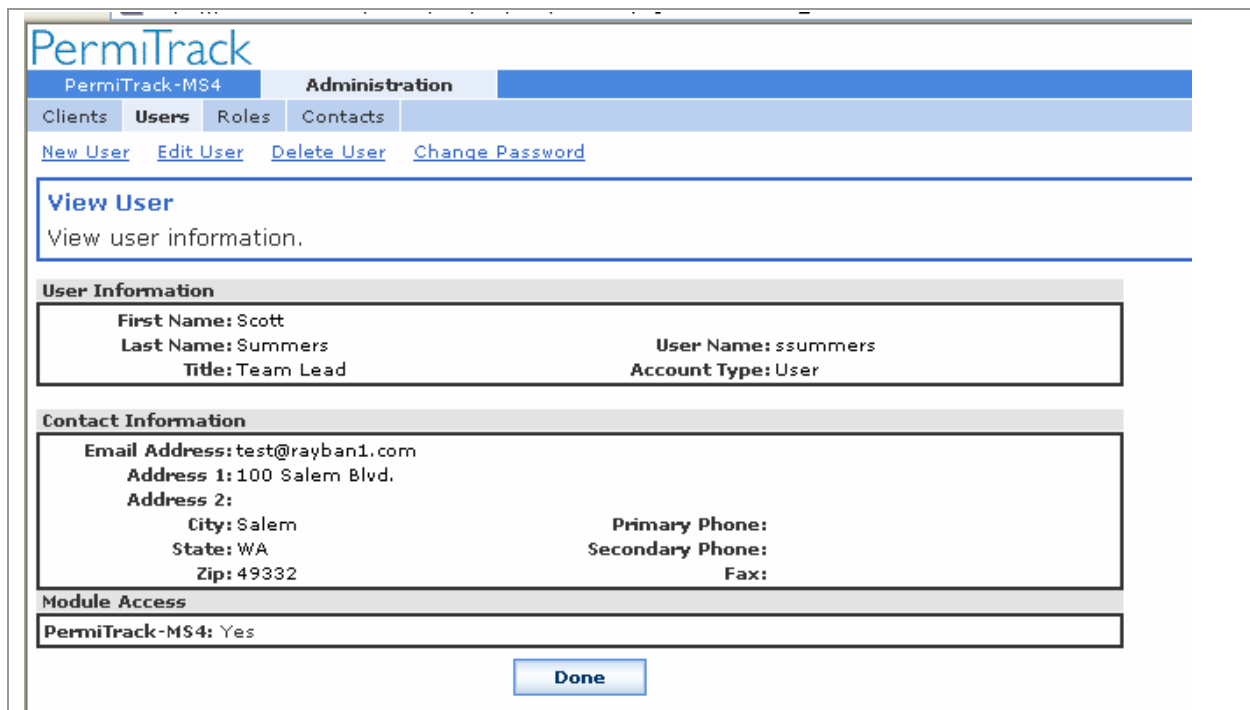
Buttons on the Create User page

- **Create User**: Click the Create User button to save your changes and create the user's account.

- **Cancel**: Click the Cancel button to discard any changes and return to the User List page. The user is not saved.

View User page

The View User page shows all of the information set up for the user you selected on the User List page. This person has access to the Client Access Point site.

The View User page opens when you click the name of a user on the User List page (on page 17).

Figure 7. View User page

Information on the View User page

See the Create User page (on page 18) for descriptions of the information displayed on this page.

Links & Button on the View User page
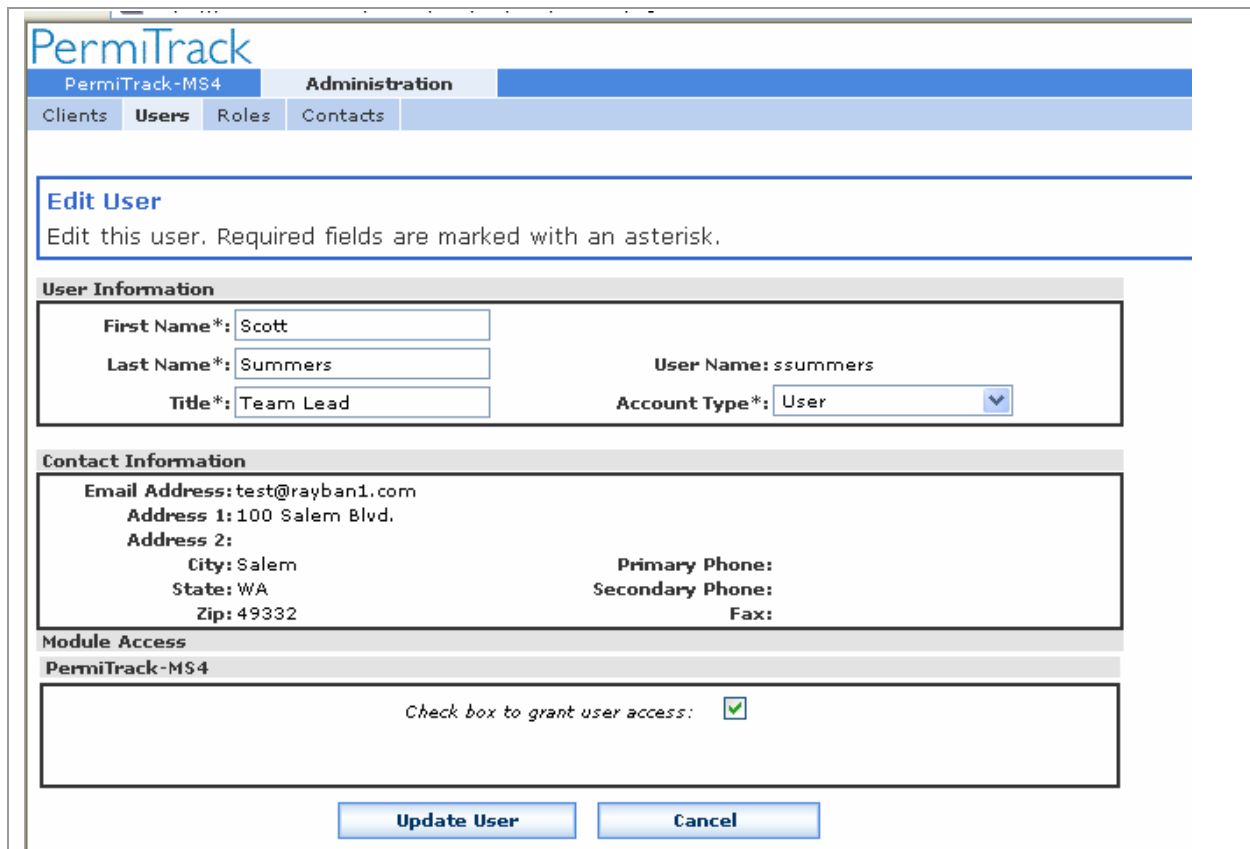
- **New User**: Click the New User link just below the tabs to add a user to the current client. The Create User page (on page 18) opens.

- **Edit User**: Click a name in the User Name column to view that person's record. The View User page (above) opens.

- **Delete User**: Click the Delete User link under the tabs to remove the user displayed on the View User page. The Delete User page (on page 23) opens.
  After being deleted, the person no longer has access to the site and is not listed on the User List page (on page 17).

- **Change Password**: Click the Change Password link under the tabs to open the Change Password page (on page 22), where you can change the password for the user displayed on this page.

- **Done** button: Click the Done button at the bottom of this page to return to the User List page.

Edit User page

On the Edit User page, change or update any of the user's information. For example, use this page to update a phone number or job title.

The Edit User page opens when you click the Edit link under the tables on the View User page (on page 20).

Figure 8. Edit User page

Fields on the Edit User page

Information on the Edit User page was entered when the user was set up. See the Create User page (on page 18) for the descriptions of these fields.
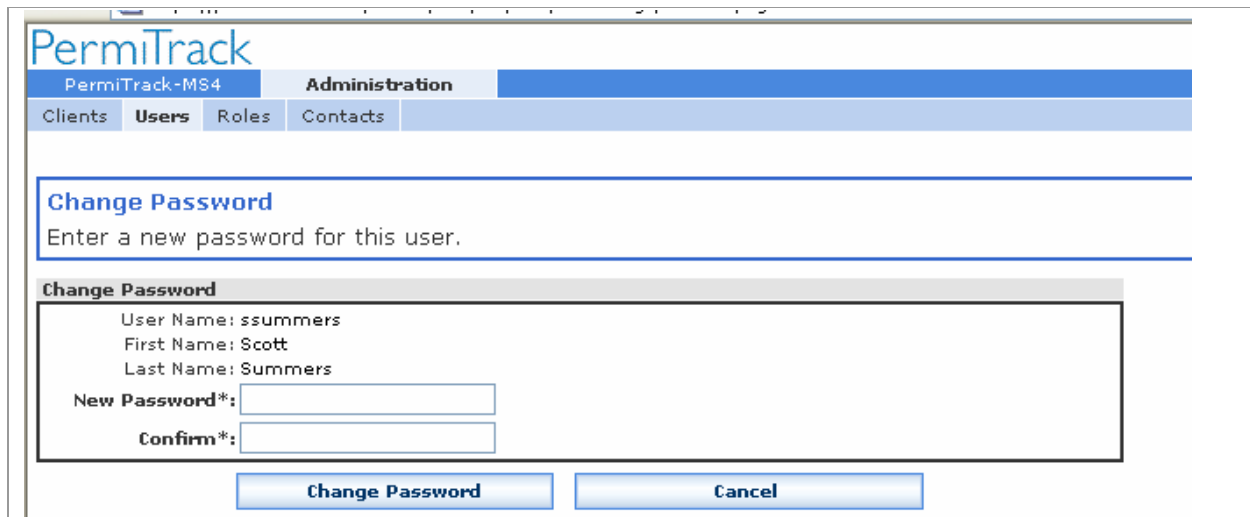
Buttons on the Edit User page

- **Update User**: Click the Update User button to save your changes to the user's record.

- **Cancel**: Click the Cancel button to return the User List page.

Change Password page

On the Change Password page, change the login password for the current user. This password, along with the user name displayed on the View User page (on page 20), is used to login to the Client Access Point site. For example, use this page if a user loses their password and needs it reset.

The Change Password page opens when you click the Change Password link under the tabs on the View User page (on page 20).

Figure 9. Change Password page

Fields on the Change Password page

- **User Name**: Displays the name of the user account you are changing.

- **New Password**: Type the new password.

- **Confirm**: Type the new password to confirm it.
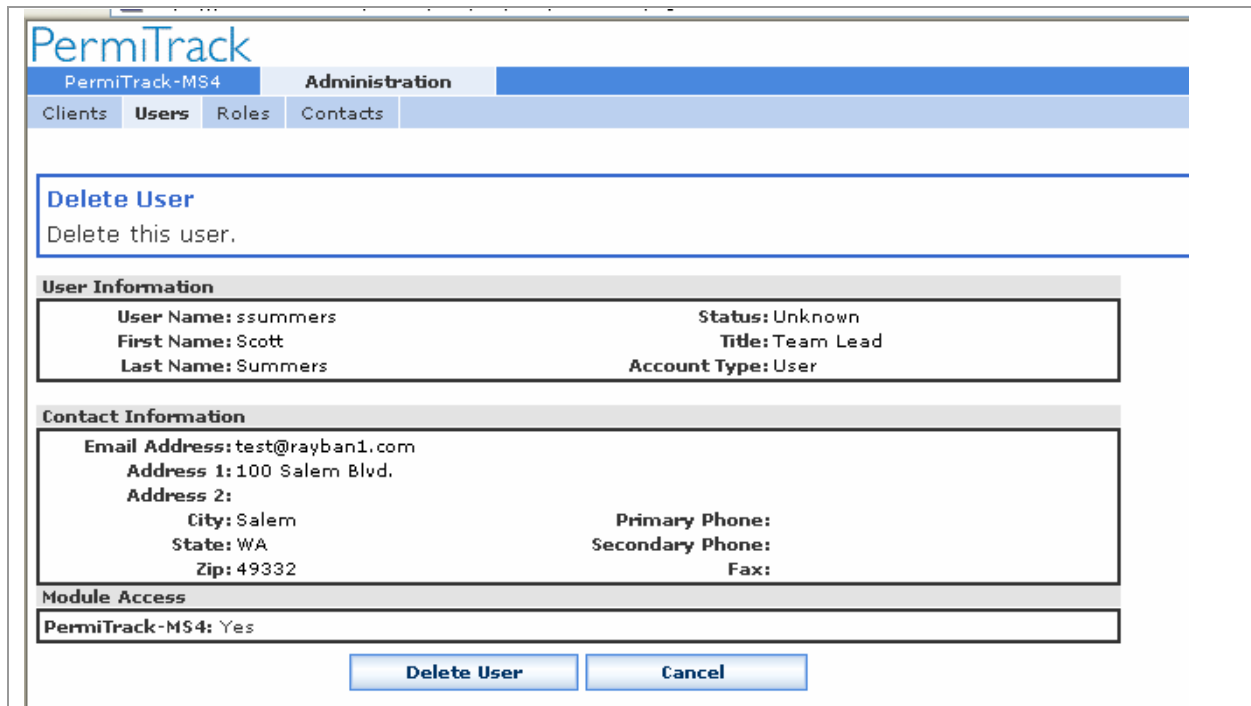
Buttons on the Change Password page

- **Change Password** button: Click the Change Password button to change the user's password to the new password. The next time this user logs in, they will use the new password.

- **Cancel** button: Clear any information you entered on this page without changing the password.

Delete User page

The Delete User page lets you confirm that you want to delete this user before deleting the record. If you clicked the Delete link on another page in error, the user is not deleted until you click the Delete User button on this page.

The Delete User page opens when you click the Delete User link below the tabs on the View User page (on page 20).

Figure 10. Delete User page

Fields & Buttons on the Delete User page

- **Delete User** button: Click the Delete User button to remove the current user from the client account. This person is no longer able to log in to the Client Access Point and their name is removed from the list of users (on page 17).

- **Cancel** button: Click the Cancel button to close this page without deleting the user.

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Roles tab

Note: Roles are not applicable for this application.

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Contacts tab

The Contacts tab lists all of the contact people associated with the current client. Users are automatically added to this list when they are added through the Users tab.

Contact List page

The Contact List page lists the contacts for organizations that can be selected in the PermiTrack-MS4 application. From this page, you can add, edit, or delete contacts.

The Contact List page opens when you click the Contacts tab from the View Client page (on page 9).

Figure 11. Contact List page
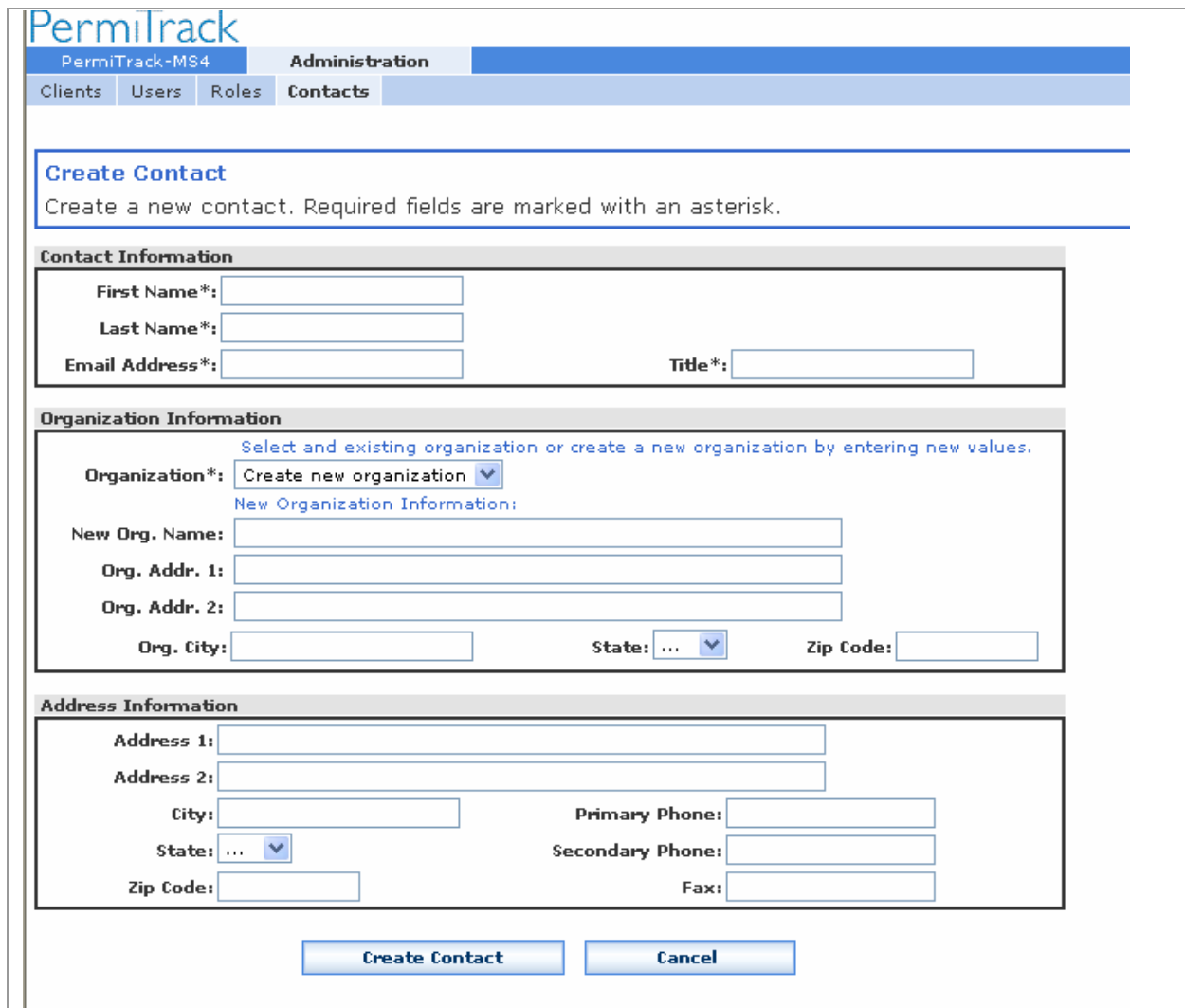
Links on the Contact List page

- **New Contact**: Click the New Contact link below the tabs to add a new contact to the list. The New Contact page (on page 28) opens.

- **Name**: Click the name of a contact person in the Name column to view more detailed information for that contact. The Contact View page (on page 30) opens.

- **Edit**: Click the Edit link to the right of the contact Name and Organization to edit or update the information for that contact person. The Edit Contact page (on page 30) opens.

- **Delete**: Click the Delete link to the right of the contact Name and Organization to remove the contact person from the list of contact people associated with the current client. The Delete Contact page (on page 32) opens.

New Contact page

On the New Contact page, enter the name, organization, address, and so on for the contact you are adding to the list. After adding a contact, you can choose this contact in the list of Contacts for a PermiTrack- MS4 project.

The New Contact page opens when you click the New Contact link at the top of the Contact List page (on page 27).

Figure 12. New Contact page

Fields on the New Contact page
- **Contact Information**

— **First Name**: The first name of the contact person.

— **Last Name**: The last name of the contact person.

— **Email Address**: The contact person's email address.

— **Title**: The contact person's position or job title.

▪ **Organization Information**
In this section, record contact information for the contact's main office.

— **Organization**: The name of the organization, company, or agency that the contact represents. This drop-down list includes all of the clients displayed on the Client List page.

Select from the drop-down list to assign this contact to one of the current organizations or enter a new organization name if the field below.

— **New Org. Name**: Enter the name of the contact's organization, if it does not appear in the drop-down list above.

Note: To use this field to add a new organization, "…" must be selected in the Organization drop-down list.

— **Org. Addr. 1**: First line of the address for the new organization you are adding.

— **Org. Addr. 2**: Second line of the address for the new organization you are adding.

— **Org. City, State, Zip Code**: City, state, and zip code for the new organization you are adding.

▪ **Address Information**
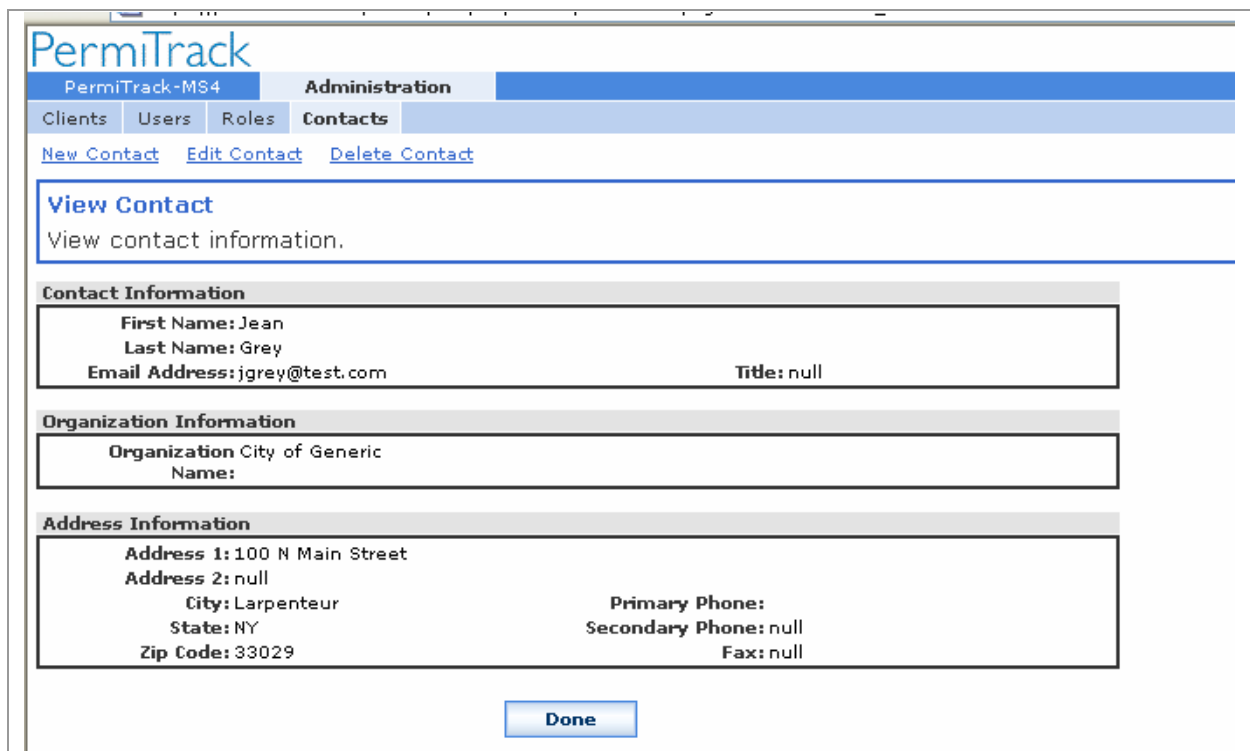
Enter the address for the contact in this section. The address for the contact's organization was listed above.

— **Address 1**: The first line of the contact's mailing or street address.

— **Address 2**: The second line of the contact's mailing or street address.

— **City, State, Zip Code**: City, state, and zip code for the contact's address.

— **Primary phone**: The primary phone number for the contact. For example, this may be the contact's direct number or the main phone number for the contact's organization.

— **Secondary phone**: A secondary phone number for the contact. This may be the contact's cell phone number or the contact's direct number if the organization's number is listed above.

— **Fax**: Fax number for the contact.

View Contact page

On the Contact View page, you can review the contact's information or select one of the links to edit or delete the current contact.

The View Contact page opens when you click the name of a contact organization on the Contact List page (on page 27).
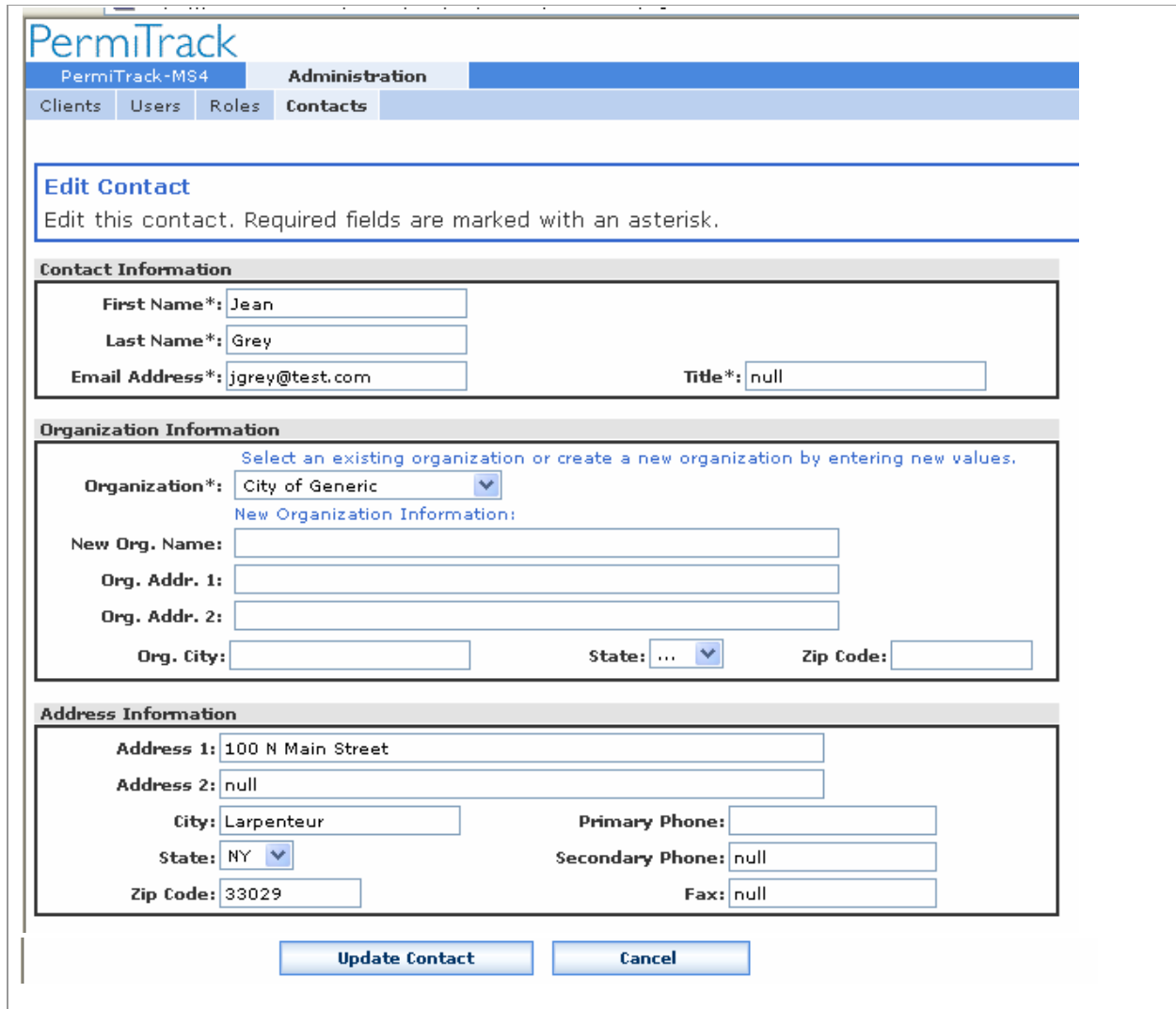

Figure 13. View Contact page

Links on the View Contact page

- **New Contact**: Click the New Contact link below the tabs to add a new contact person to the client. The New Contact page (on page 28) opens.

- **Edit Contact**: Click the Edit Contact link below the tabs to edit or update the information for the current contact person. The Edit Contact page (below) opens.

- **Delete Contact**: Click the Delete Contact link below the tabs to remove the current contact person from client. The Delete Contact page (on page 32) opens.

Edit Contact page

On the Edit Contact page, update the contact's information, including the name, address, and so on. If the contact for an organization changes, but not the address information, you can change the contact's name on this page, without creating a new record.

The Edit Contact page opens when you click the Edit link to the right of the name of a contact organization on the Contact List page (on page 27).

Figure 14. Edit Contact page

Fields on the Edit Contact page

Information on the Edit Contact page was recorded when the contact was entered into the system. See the New Contact page (on page 28) for descriptions of these fields.
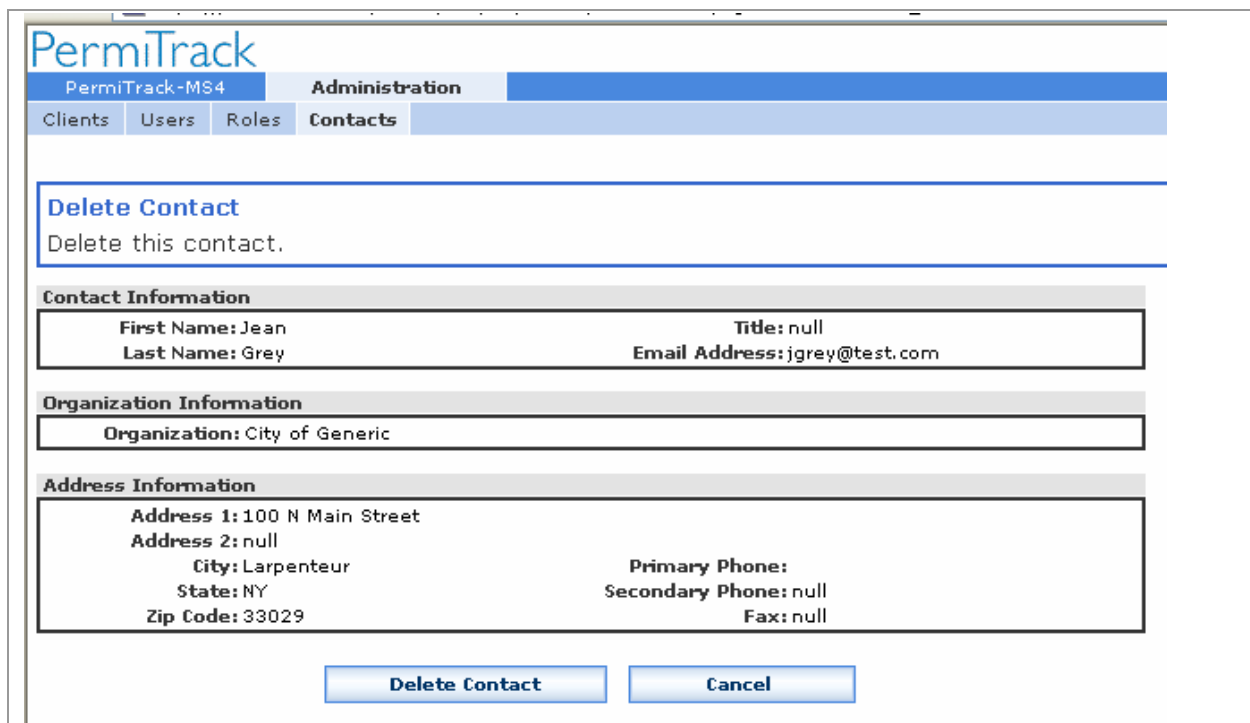
Buttons on the Edit Contact page

- **Update Contact** button: Click the Update Contact button to save your changes to the contact's record.

▪ **Cancel** button: Click the Cancel button to discard your changes without saving.

Delete Contact page

The Delete Contact page lets you confirm that you want to delete this contact before deleting the record. If you clicked the Delete link on another page in error, the role is not deleted until you click the Delete Contact button on this page.

The Delete Contact page opens when you click the Delete link to the right of a contact name on the Contact List page (on page 27). You return to the Contact List page after the contact is deleted or if you click the Cancel button.

Figure 15. Delete Contact page

Buttons on the Delete Contact page

▪ **Delete Contact** button: Click the Delete Contact button to permanently remove the contact person from the client.

▪ **Cancel** button: Click the Cancel button to close this page without deleting the contact. You return to the Contact List page.

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