Electronic Application and Reporting Portal

Video Script: How to Manage Users

Welcome to the Delaware River Basin Commission's Electronic Application and Reporting Portal.

This training video covers three topics. First we will review who is intended to use the approval management system, and how each can change their user profile information. Then we will cover what are called “User Permissions”. And finally, we will discuss how to add and remove contacts from an organization’s account.

Please recall that there are two types of users intended to use this system. The first is a person who is affiliated with an organization that has an approval from DRBC, such as a utility or municipality. The second is a person who works as a third party to one of these organizations, such as a consultant.

Once logged into the system, either type of user may change their profile information by clicking the icon at the top right and selecting “Account”. Here you will be able to update contact information, or change your password under the “Security” tab. If you are affiliated with multiple organizations, you can change between organizational pages using the adjacent drop-down menu.

Importantly, both types of user profiles have what are called “permissions” which allow them to do certain things within the system. To access user permissions click “Manage Organization” on the left nav menu. Then, navigate to either “Organizational Contacts” or “Third Party Contacts”. Choose the “Edit” action next to the profile you wish to view. A window will pop-up showing the user profile information, followed by organizational permissions.

The option “Enable Web Access” is set when adding a contact to the system. If this is set to “Yes”, the person will be e-mailed an invitation to create a user profile when the contact is added. If this is set to “No”, they will not be asked to create a login, however, they can still receive system notifications related to specific approvals.

The permission for “Administrator” is also set when adding a contact to the system. An administrator has the ability to invite contacts or remove them from the organization. Without the “Administrator” permission set as “Yes”, the user profile will not see a button to manage organizations on the left nav menu.

The permission for “Water Charge Reporter” will allow that user to see the button for “Water Charge Reporting” on the left nav menu. These reports are necessary for specific organizations that withdraw surface water. There is no limit to how many people may have this permission within the organization.

Settings for specific approval notifications and permissions can be set at the bottom. Under notifications, the selected options indicate what type of notifications about an approval a contact will receive. These cannot be adjusted if the administrator permission is set to yes.

General notifications may be e-mails about reporting requirement deadlines, whereas formal correspondence could be certified mail related to commission action. The access permissions indicate if the contact is allowed to manage approvals (such as renewing an application) or if they are only able to view information and submit deliverables.

Lastly, we will discuss how to add or remove contacts.

To perform these actions, your user profile must have the Administrator permission. To remove an organizational contact, open the edit feature for the specified contact and uncheck the button for “active”. They will no longer appear on the list of organizational contacts.

However, if this was done on accident, attempting to add a new contact with the same e-mail address will return an error warning. Instead, change the contacts list filter for active status from “Yes” to “All”. Reopen the “edit” window and check the button for “active”. They should re-appear on the list of active organizational contacts.

To add a <u>new</u> contact from your organization use the “Add” button. Enter in their general contact information, set permissions, and click “Save”. An e-mail will be sent asking them to login.

To remove external contacts such as a consultant, navigate to “Third Party Contacts” and simply use the delete button to remove them from the organization. You are not deleting their profile.

To add external contacts, even if they are already in the system, use the “Add” button. The first request is for an e-mail address to check if the contact already exists in the system. If they do, you will not need to enter general contact information and will only be asked to set permissions. Once they are set, click “Save”.

Thank you for your attention, and please view other instructional videos to find out more.