LRFP AND PROJECT APPLICATION TRACKING SYSTEM

District Administrator Instructions

Each school district is responsible for creating and assigning user accounts to access the district's data on the LRFP and Project Application Tracking website. The person responsible for creating user accounts and assigning access privileges is called the "Administrator." The initial user name and password provided to the district by the DOE has Administrator privileges.

The District Administrator can create as many user accounts as desired and can also assign other Administrators. However, it is important that the district carefully control website read/write privileges. "Saved" actions cannot be "undone" and deleted data cannot be recovered.

The following provides instructions for the District Administrator on how to assign and control user accounts. If further assistance is needed, contact VFA Help at help@vfa.com or call VFA using the toll free number 888-506-8500.

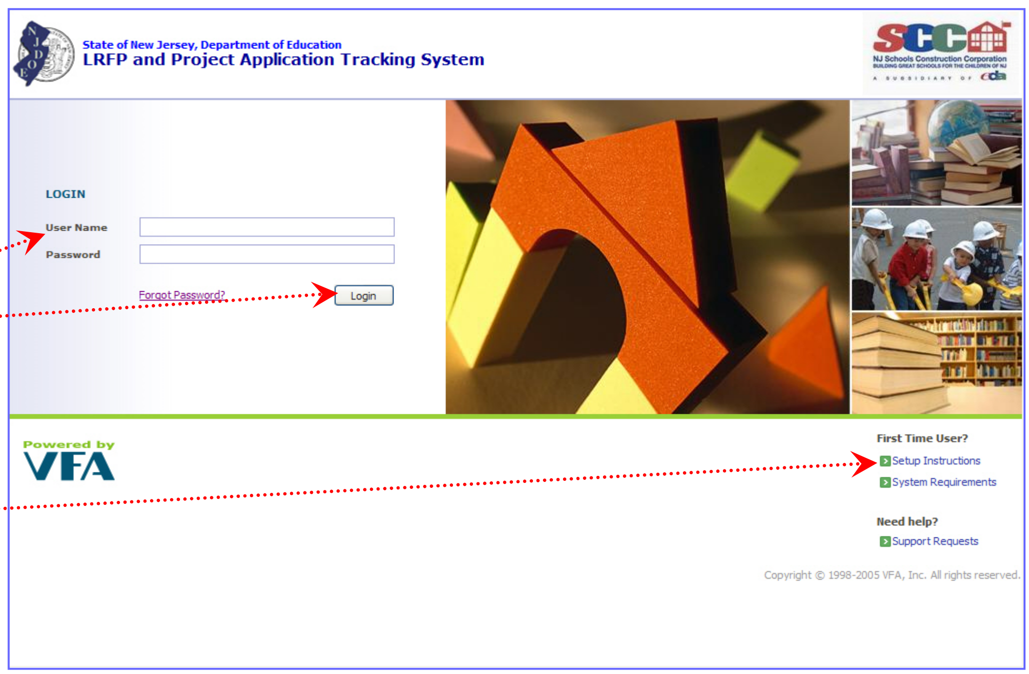
Accessing the Administrator Section of the Website

1. Login to the website using the username and password provided by the DOE.

Type in your User Name and Password.

Click on Login Button.

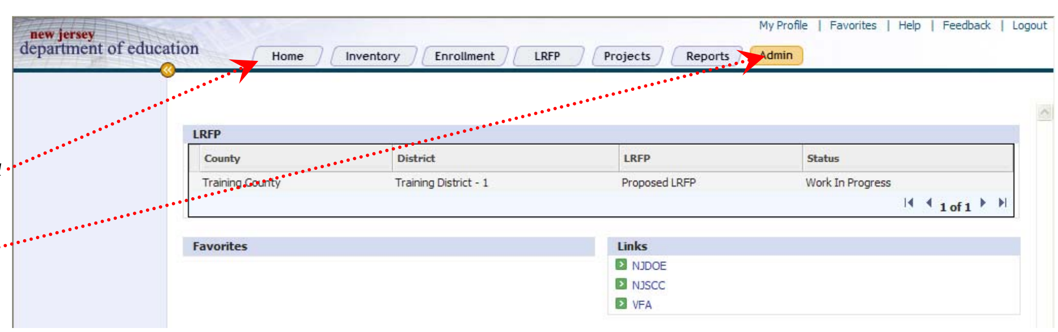
If this is the first time you are accessing the website on your computer, click Setup Instructions.



2. After you successfully login, you will be at the Home Page. The Main Menu will appear at the top of the screen. The Main Menu allows access to all work areas on the website. Click on the **Admin** tab. If the Admin tab does not appear, the user name that you used to login has not been assigned Administrator privileges.

Main Menu

Click on Admin tab to create new user accounts.



Creating a New User Account

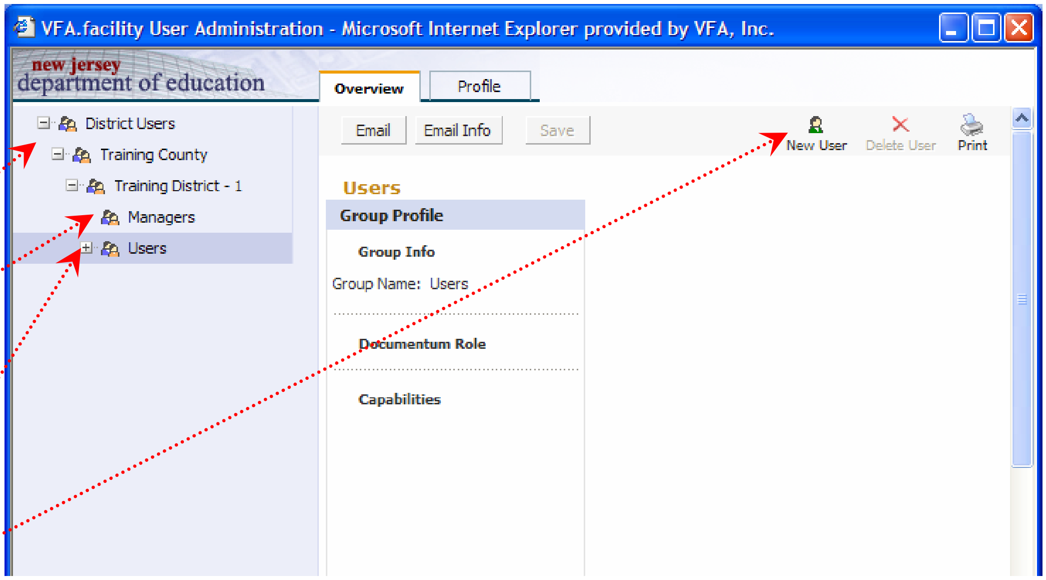
1. After you click on the Admin tab, the Admin window shown below displays. From this screen, you can create users within your own district. On the left side of the screen, in the blue shaded area, click on the "+" sign next to District Users and your County Name *(Training County in the example below)* will appear. Click on the "+" sign next to County and your District name *(Training District -1 in the example)* will appear. Click on the "+" sign next to your District name and you will see Managers and Users listed below. If you click on **Managers**, you will see the current list of District Administrators in the side menu. If you click on **Users**, you will see the current list of user accounts. To create a new user, click on **Users** in the side menu and then click on the **New User** Icon in the upper right corner of the screen.

Click the "+" sign for each level to get to Managers and Users.

Click on Managers if you want to create another Administrator account.

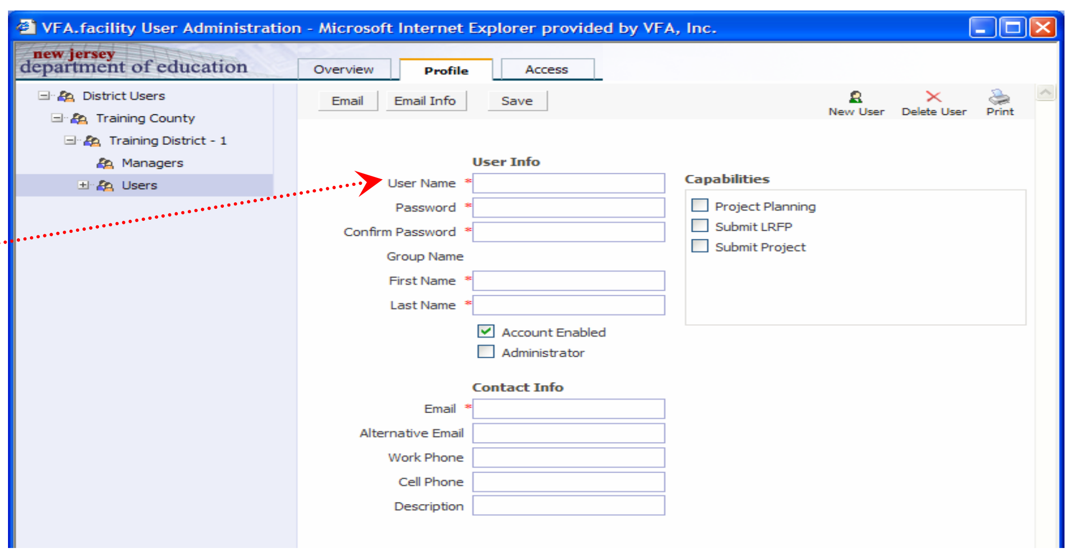
Click on Users if you want to create a user account.

Click on the New User Icon to create the account.



2. After you click on the New User Icon, the screen below will display. Fill in each of the fields on the screen. All fields marked with a "*" are required. A description of each **Profile** field is provided on the following page.

Fill in user information.



USER INFO:

User Name and Password: There are no requirements for user name and password formats. However, it is recommended that passwords be alpha/numeric (contain both numbers and letters) and be at least six characters in length. Also, please note that passwords are case-sensitive. Only the Administrator can change user names and passwords.

First Name / Last Name: Enter the first and last name of the user to whom you are assigning website access.

Account Enabled: The "Account Enabled" box must be checked in order for the user to be able to login to the website. Uncheck the box if you want to disable the account. This allows you to temporarily take away access from a user without deleting the user record if the user may need to access the website again in the future.

Administrator: You can designate the user as an Administrator, who will be able to access the Admin section of the website and create user accounts, by checking the Administrator checkbox. This box will be checked if you accessed the Profile screen by clicking on Managers in the left menu. The box will be unchecked if you accessing the Profile screen by clicking on Users in the left menu. However, you can determine whether or not the user account has Administrator privileges by checking or unchecking the box.

CONTACT INFO:

Email / Alternative Email: You must enter at least one email address for the user. The email address can be used for sending the account information to the user. *(See page 5.)*

Work Phone / Cell Phone: Enter phone numbers for the user.

Description: Enter a description, such as the user's title and affiliation.

CAPABILITIES:

The Administrator determines the ability of each user to accomplish tasks on the website. By default, all users with "Full Access" can work on and submit LRFPs and projects. To limit this access, use the following check boxes:

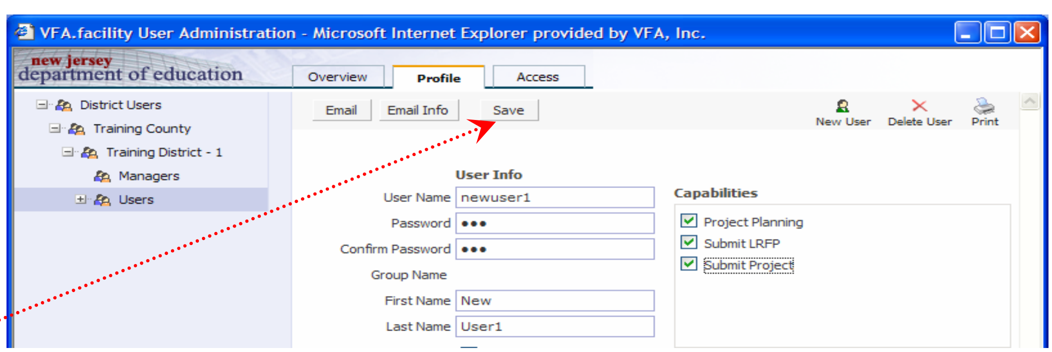
Project Planning: Check the Project Planning box if the user can create projects based on an approved LRFP. Uncheck this box to prevent access to the Projects section of the website.

Submit LRFP: Check the Submit LRFP box if the user can submit a LRFP to the DOE and generate transmittal sheets for supporting documentation. Uncheck the box if the user should not be able to submit a LRFP or send documentation to the DOE. *(User can still have read/write privileges to work on the LRFP if box is unchecked.)*

Submit Project: Check the Submit Project box if the user can submit projects to the DOE and generate transmittal sheets for supporting documentation. Uncheck the box if the user should not be able to submit projects or send documentation to the DOE.

5. After you have filled in all fields, click the **Save** button to create the new account. You can continue to create new user accounts from this screen by clicking on the New User Icon.

Click on the Save button to save the user's Profile and create the account.



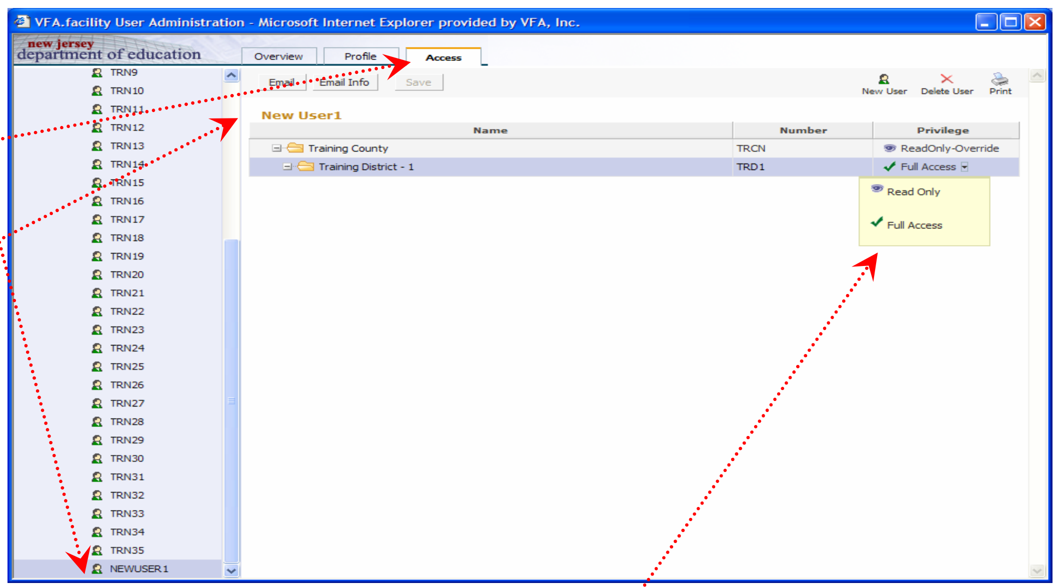
Assigning Privileges

After you create a user account, website privileges default to "Full Access," which allows read/write privileges. To change access privileges, click on the **Access** tab. Once you click on the Access tab, the screen shown below will display. The menu in the blue shaded area in the left part of the screen contains user names. The highlighted name is the user to whom privileges are being assigned. The user name also appears at the top of screen in orange. In the **Privilege** column, a drop-down list appears when clicked that allows you to select a privilege of **Read Only** or **Full Access** for the user. Select the access level that is appropriate for the user.

> **Read Only Access:** Read Only access only allows the user to view district data. The user will not be able to alter any data or create new records. Read Only access should be considered for district staff and administrators, the Board of Education, and other community members and groups that have a review interest in the district's facilities but do not develop the data themselves.
>
> **Full Access:** Full Access allows the user to view AND modify district data. Full Access should typically be given to any district employee or consultant that is working on the LRFP or DOE project applications. *(See "Capabilities" on page 3 on how to limit full access.)*

Click on Access to change default of Full Access for a user account.

User for who you assigning access privileges



Select Read Only or Full Access for the user

Confirming and Editing Accounts

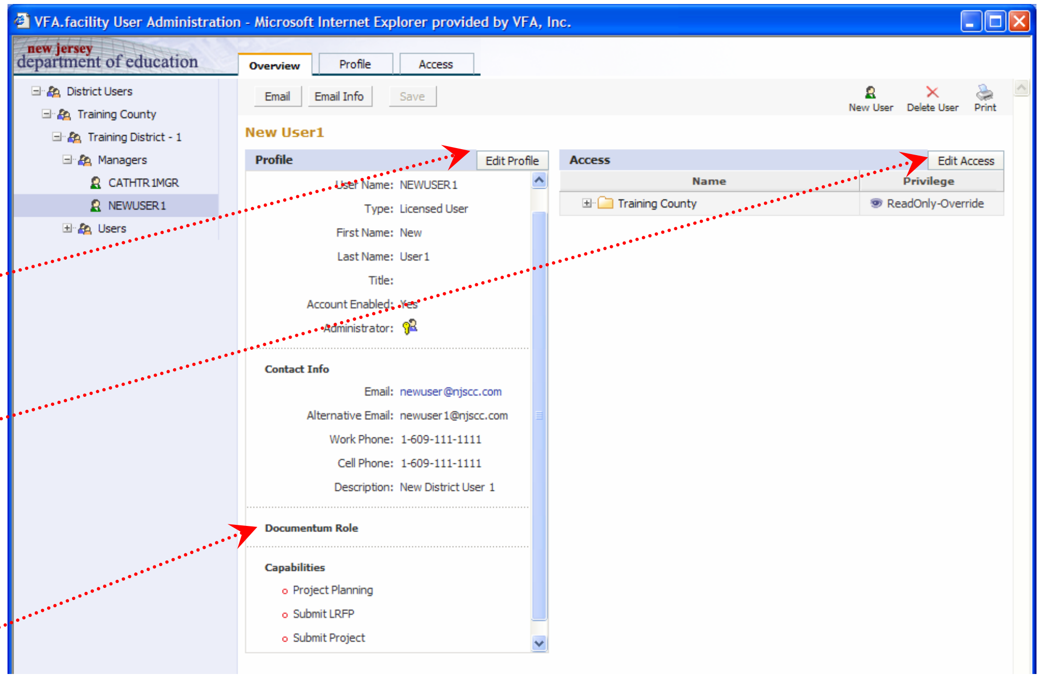
Click on the **Overview** tab to verify that the user's information and access privileges are correct. For example, in the screen shown on the following page, NEWUSER 1 has Read Only Access to Training District -1. Click on the **Edit Profile** or **Edit Access** buttons if changes are needed.

District Administrators should review their own account Profile and add missing information. The user name and password can also be changed if desired. *(User accounts that do not have Administrator capabilities cannot change their password.)*

Click on Edit Profile if changes are needed for highlighted user.

Click on Edit Access if changes are needed for highlighted user.

The Documentum Role indicates whether the user has access to the document management system. (This access is assigned by the DOE.)



Informing the User of Login Information

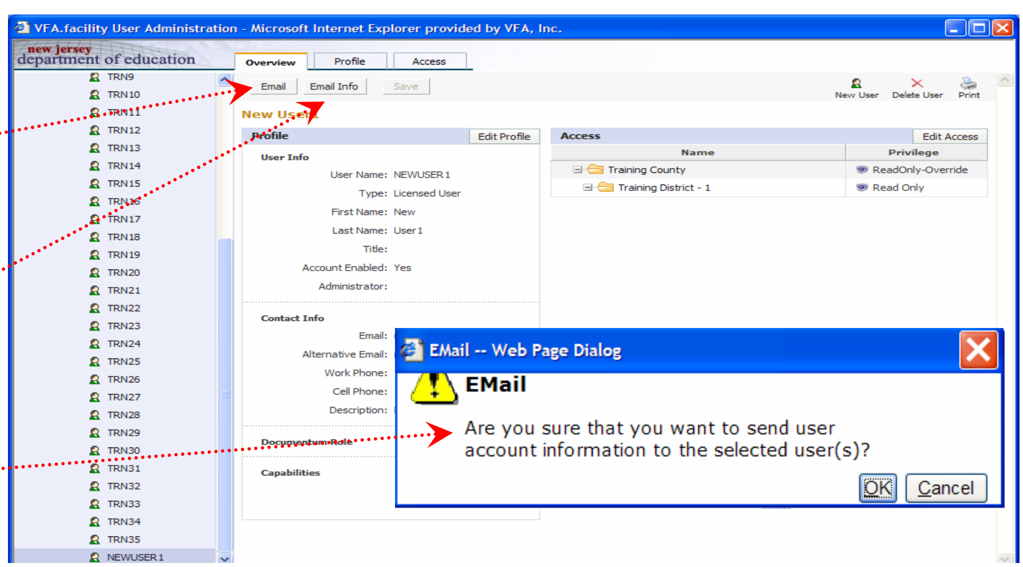
After you create a user account, you can email account information to the user by clicking on the **Email Info** button from the Overview, Profile, or Access view. When you click on the Email Info button, the screen below will display. Click OK to send the user name and password information to the user's email. You can send an email to one or multiple users using the menu in the blue shaded area on the left side of the screen. If you click on **User** in the left menu and then click on **Email Info**, all users will be sent an email with their account information. The email in the sample screen below is being sent to "New User 1" as noted in the orange text at the top of the screen. New User 1 is also highlighted in the left menu. *(If you click on the Email button, rather than the Email Info button, you will just open a blank email addressed to the account user.)*

You should verify that you have assigned the proper access and privileges before you send the account information to the user. However, you can change, suspend, or delete the user account at any time.

Click on Email to send an email to the user.

Click on Email Info to send account information to the user.

A confirmation screen appears after you click on the Email Info Button. Click OK to send the email to the user.



Deleting User Accounts

You can delete a user account by highlighting the user to be deleted in the menu on the left side of the screen and clicking on the Delete Icon. You should delete user accounts assigned to:

- Employees who no longer work for the district;
- Board of Education members and other community representatives who are no longer affiliated with the group to whom the district granted access; and
- Consultants who have completed a job that required website access, such as the LRFP or a building project.

If a user has completed tasks requiring website access, but will likely require website access in the future for new assignments, you can “uncheck” the Account Enabled box in the Profile section. This will make the account inactive. When you want to restore user access, check the Account Enabled box. This eliminates the need to enter user data a second time.

Click on Delete User to delete a User Account.

Uncheck Account Enabled to stop website access but retain user account information.