Appendix F. Administration Functions

F.1. User Administration

The "delegated" work flow, available only outside of the prior data entry system, is now available in the CWNS DEP via the User Management data area. In the "delegated" work flow, EPA knows the State CWNS Coordinators and trusts them with delegation rights, specific roles and responsibilities. In turn, State CWNS Coordinators know the Secondary State and Local CWNS Users; it is up to the State CWNS Coordinators to assign delegation rights, roles, and responsibilities to these users. Roles and access levels in the delegated work flow are described in Table F-1.

CWNS Users have Federal, State, and/or Local Role. The Federal role is limited to EPA headquarters staff, EPA Regional Coordinators, and the Contractor Review Team. The State role is assigned to State CWNS Coordinators. They can assign the State role to Secondary State staff (e.g., State staff and State CWNS contractors). State Users with appropriate State User Management (a.k.a. State User Managers) can assign the Local role to facilities, municipal governments, and other organizations interested in providing feedback on CWNS data. The Local role can also be assigned to Secondary State staff.

For each Role, there are Access Levels. The Access Level determines the type of activity that the user can perform within the DEP. Activities range from viewing the data to submitting it for review to managing users. (Note: Users can and in many cases need to have more than one access level.) In addition, users can be granted access to all facilities/projects in the State, or they can be restricted to one or more facilities/projects.

Table F- 1: Roles and Access Levels in the CWNS "delegated" work flow.

Access Level	Definition	Responsibility
Role – Federal		
IAM Portfolio Manager (EPA Office of Envr. Information)	The manager for the Identity and Access Management (IAM) system.	Sets the Delegated User Administration policy for the enterprise IAM system. Ensures that IAM policies are properly enforced.
CWNS System Manager (Michael Plastino)	The owner of the CWNS System.	Responsible for enforcement of overall security for the CWNS system.
CWNS Community Managers (EPA Headquarters CWNS Team)	Implements the decisions of the CWNS System Manager and conducts day-to-day management of users on the CWNS system.	Grants the appropriate permissions to State staff identified by the CWNS System Manager to act as a CWNS State Administrator.
Role – State		
State CWNS User Management	A State employee approved by the CWNS System Manager to manage State Users and facility administrator accounts.	Provisions, manages, and de-provisions State Users associated within his/her State. Provisions, manages, and de-provisions Local User Manager accounts for facilities/projects located in his/her State.

Access Level	Definition	Responsibility
State Reference Admin	Allows the State User add and update static data (e.g., pollution problem) via the Administration portlet. It does not allow the user to manage user accounts and update and submit facility/project data.	
Submit for Federal Review	Allows State Users to submit the data to EPA for review. It does not allow the user to update facility/project data.	
Facility Update	Allows State Users to directly update facility/project data in the DEP. It does not allow the user to submit the data to EPA for review.	
View	Allows the State Users to view facility/project data. The user cannot update the data. All State Users are granted this access level.	
Role – Local		
CWNS Local User Management	A Local or Secondary User from the same State as the user manager and identified by the State User manager to manage user accounts associated with the assigned facilities/projects.	Provisions, manages, and de-provisions facility users associated with assigned facilities/projects.
Submit for State Review	Allows State User to submit the feedback data to the State for review. It does not allow the user to provide feedback or directly update the Utility Management and Unit Process data.	
Facility Update - Feedback	Allows State User to provide feedback for all data areas except Utility Management and Unit Process for assigned facilities/projects in the DEP. It does not allow the user to submit the feedback to the State for review or update the Utility Management and Unit Process data areas.	
Facility Update – Partial	Allows State Users to directly update the facility/project's data in the Utility Management (when applicable) and Unit Process tabs in the DEP. Saved changes made the Utility Management and Unit Process are available to the State immediately. It does not allow the user to provide feedback to other data areas or submit the feedback to the State for review.	
View	Allows the State Users to view facility/project data, except Needs data. The user cannot provide feedback on the data or change the Utility Management and Unit Process data. All Local Users are granted this access level.	

F.2. CWNS Local User Manager

State User Managers (e.g., State CWNS Coordinators and others assigned this Access Level by the State CWNS Coordinator) grants the access level Local User Management (a.k.a., Local User Manager) at their discretion. The Local User Manager has the following privileges **for his/her assigned facilities/projects** (a subset of the State's facilities/projects):

- Create new Local User accounts
- Limit Local User access to specific facilities and projects (if the Local User Manager is assigned more than one facility/project)
- Modify access rights associated with Local User accounts

The Local User Manager must confirm the identity and credentials of all Local Users to whom they grant access to the DEP. Given that CWNS data is public domain, the Local User Manager simply confirms a user's identity based on information either on hand or obtained from a known trusted contact, such as a letter using official letterhead (e.g., State, facility, municipal government) or a reference from a known trusted contact.

F.3. Administration Portlet

The User Management data area is accessed via the Administration portlet (Figure F-1) and is available only to State and Local User Managers.

- *Click the link Manage Users (# Pending) in the Administration portlet to open the User Management Data Area (see next section).*

  The number Pending indicates how many users have applied for CWNS user privileges and are waiting to have their request approved or denied.

Figure F- 1: Administration portlet

F.4. User Management Data Area

This data area includes three portlets, User List, User Details, and User Search, to manage User Roles, Access Levels, and Facility/Project assignments.

F.4.1. User List

The User List provides an alphabetical list by last name of the names and portal usernames of users currently associated with the Local User Manager's facilities/projects (Figure F-2) and the date that their account was last changed. It also indicates the user's status as:

- Active: Currently is granted access to one or more facility/project in the DEP.
- Inactive: Not currently granted access to one or more facility/project in the DEP.
- Pending: Waiting for requested user access to be approved or denied. Users with this status have applied for a CWNS user account via the self-registration process (see Chapter 2) or have been created by the Local User Manager as a new user. The date listed indicates when the account was initiated.

The User List displays ten users at a time. The total number of users is indicated at the bottom of the User List (e.g., 1-10 of 21).

- *Click Next to display the next ten users (if not at the end of the list) and click Prev to display the previous ten users (if not at the beginning of the list). Click >> to display the last page of users and << to display the first page of users.*

  See User Search for information on searching the User List.

The User List portlet allows Local User Managers to launch the User Details portlet.

- *Click on the hyperlinked name to open User Details portlet for the selected user. The selected user is highlighted in Green in the User List (see Editing User Details).*

- *Click the hyperlink Add User to add an additional user to the current State. This action also opens the User Details portlet (see New User Accounts).*

Figure F- 2: User List

F.4.2. User Search

The User Search portlet allows the State User Manager to search all Local Users in the State based on one or more of the criteria provided in Table F-2.

Table F- 2: Explanations of User Search criteria

Search Criteria	Explanation
Name	Performs a keyword search on the data field Name. *Type the keyword(s) in the text box.*
Location	Limits the search results to the user's State.
Type	Limits the search results to Local Users.
Status	Limits the search results by User Status. *Select All, Active, Inactive, or Pending from the dropdown list.*
Access Levels	Limits the search results by user Access Level (see Table F-1) for definitions. *Select one or more Access Levels from the list. Use the Control key to make multiple selections.*

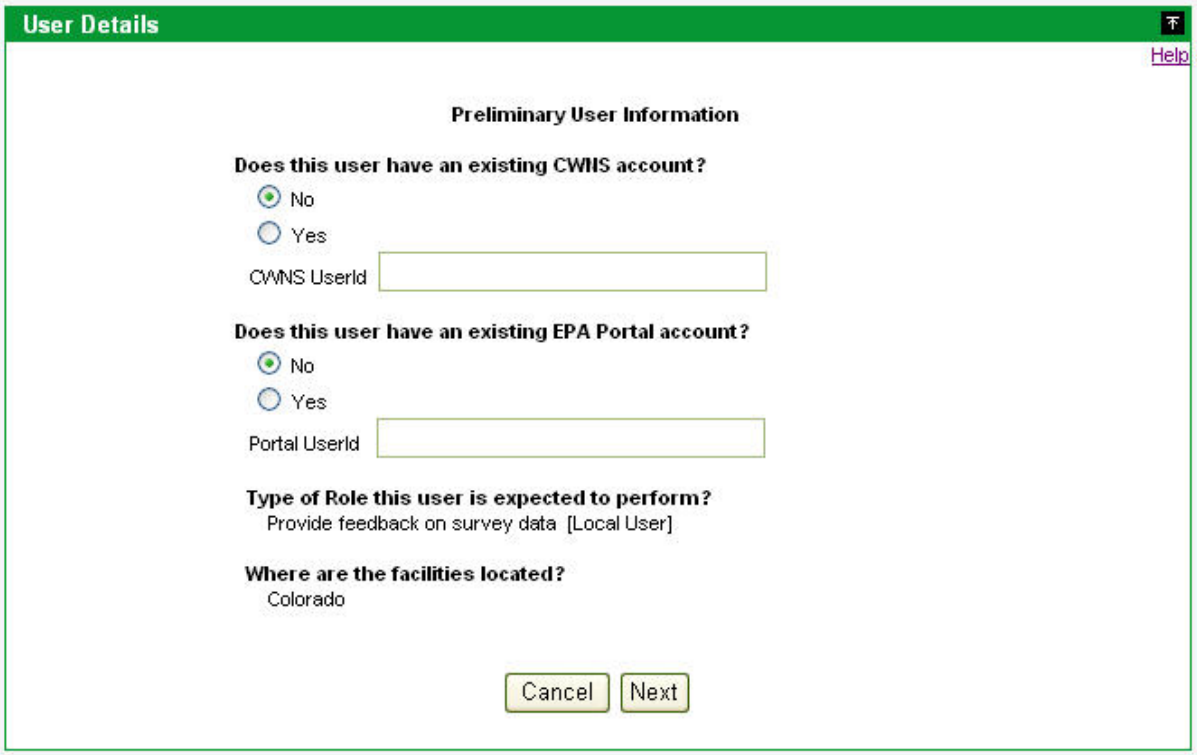
Search results are displayed in the User List. To clear the search results, click Display Default List.

F.5. New User Accounts

Local User Managers can initiate new user accounts.

- Click the Add User hyperlink from the User List and the User Details portlet displays the area Preliminary User Information which asks a series of question about the new user (Figure F-3).

Figure F- 3: New user account Preliminary Information screen



- *Indicate whether or not the user has an existing CWNS account by selecting the radio button for either yes or no. The answer is no in almost all cases.*

- *Indicate whether or not the user has an existing portal account by selecting the radio button for either yes or no. If yes is selected, provide the user's Portal UserId. If yes is selected, the User Profile Information is read-only.*

  The Type of Role for the user is pre-populated with "Provide feedback on survey data [Local User]." The State field is also pre-populated.

- *Select* Next *to continue the New User creation process or* Cancel *to end the New User creation process.*

The User Profile Information area (Figure F-4) requests the information needed for establishing the new user's portal account. For user's with existing portal accounts, this screen is view only. Data fields are explained in Table F-3; all data fields are required as indicated by the red asterisk (*).

Figure F- 4: New user account User Profile Information screen

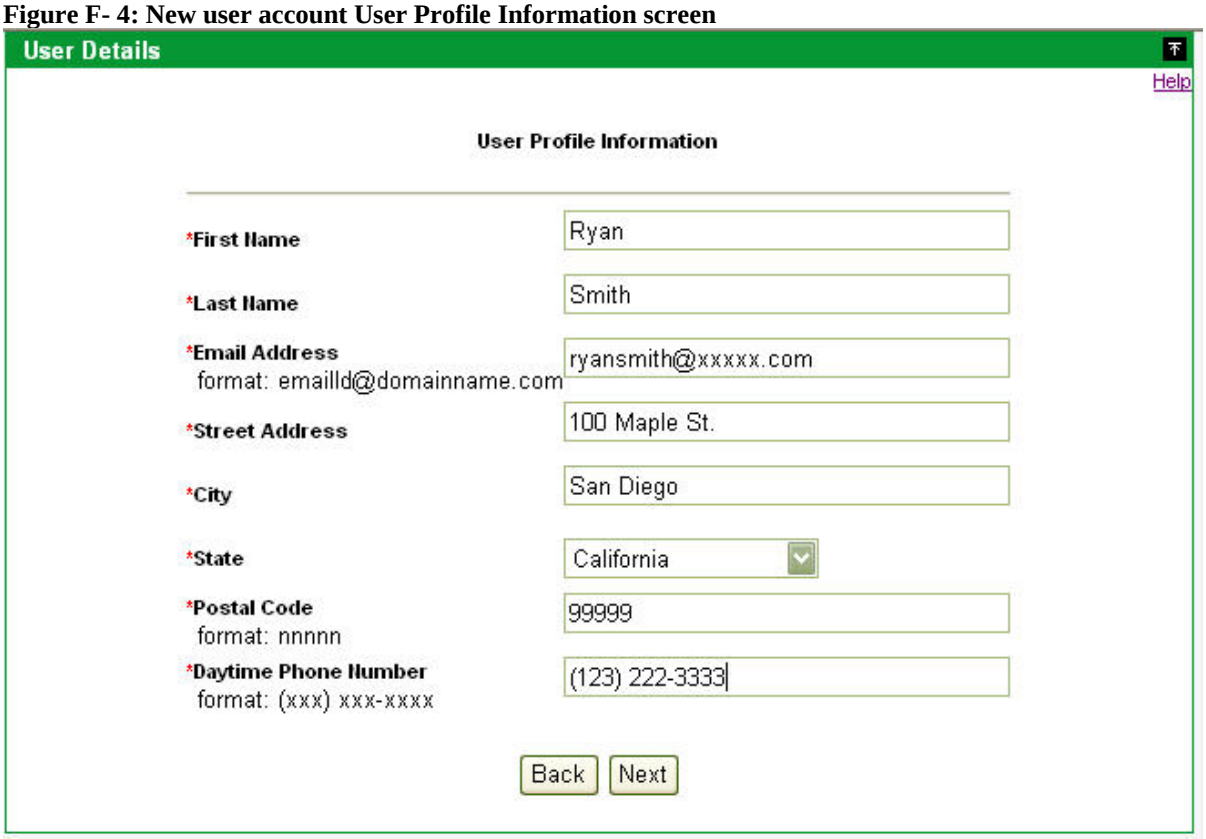


Table F- 3: Explanations of User Profile Information data fields

Data Field	Explanation	Required
First Name	*Enter the user's first name.*	Yes
Last Name	*Enter the user's last name.*	Yes
Email Address	*Enter the user's email address in the format EMAILID@DOMAINNAME.COM.*	Yes
Street Address	*Enter user's street address.*	Yes
City	*Enter the user's city.*	Yes
State	*Select the user's State from the dropdown list. The default selection is the User Manager's State.*	Yes
Postal Code	*Enter the user's five-digit postal code.*	Yes
Daytime Phone Number	*Enter the user's ten-digit telephone in the format (xxx) xxx-xxxx.*	Yes

- *Select* Next *to continue the New User creation process or* Back *to return to the Preliminary User Information.*

The Local User Manager is redirected to the User Detail page and must approve the new user to complete the process (see New User Approval). At this screen, changes can be made to the user's Access Level(s) and Facility(ies)/Project(s) (see Editing User Details).

F.5.1. New User Approval

For new user accounts, the Local User Manager is redirected to the User Details portlet to approve or deny user access. Changes can be made to the Local User's Access Level(s) and Facility(ies)/Project(s) at this time (see Editing User Details). By default, new users are given the role Local and View access level for all eligible facilities/projects in their own State.

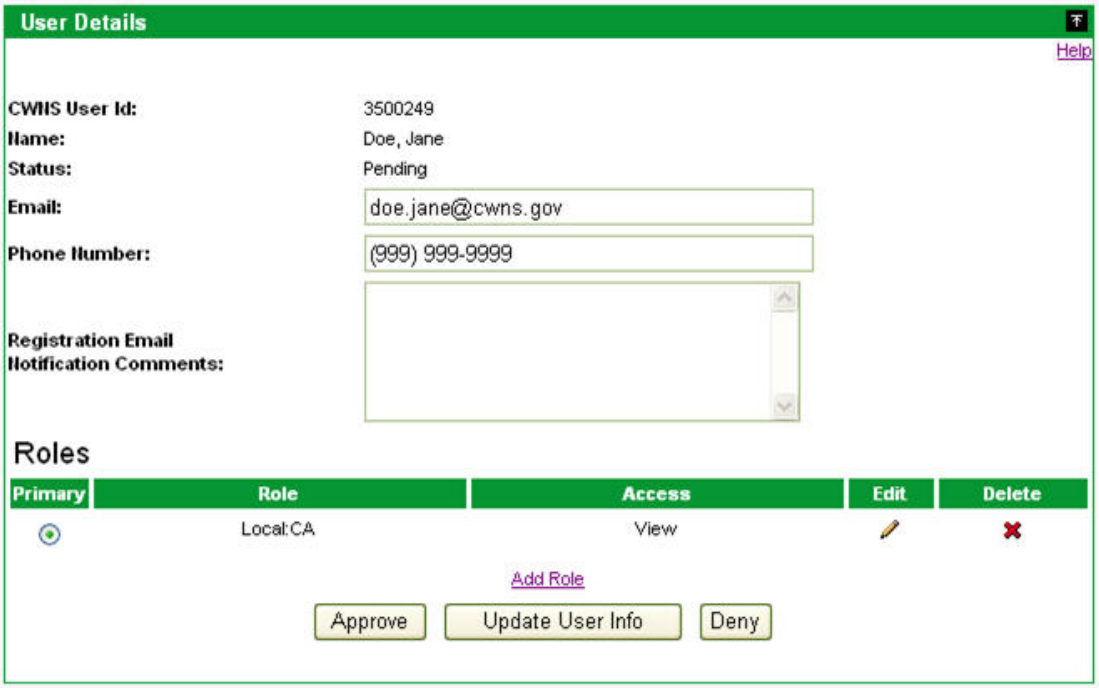
- *Click* Approve *to change the user's status to Active. The user receives an email from the account cwns@epa.gov to indicate that have been accepted and to provide access information (e.g., User ID, Password).*

  To add additional information to the auto-generated e-mail, add text to the box Registration Email Notification Comments before approving the user.

- *Click* Deny *to reject the user's application for access to the DEP. The user receives an email from the account cwns@epa.gov to indicate that have been denied.*

  To add additional information to the auto-generated e-mail, add text to the box Registration Email Notification Comments before denying the user.

Figure F- 5: New user approval screen



F.6. User Details

The User Details allows Local User Managers to view and change user information, add new user information, and approve and deny pending users. Local User Managers can only do these functions for users assigned to their assigned facilities. For example, a Local User Manager assigned facilities A, B and C can change information for Local Users assigned to facilities A and/or B and/or C. He/she cannot change information Local Users assigned to other facilities/projects in the State.

If no user has been selected from the User List, the message **"**Please Select a User From the User List" is displayed in the User Details area. After clicking the hyperlinked user name from the User List, the User Details portlet displays the selected user's data (Figure F-6). The User Details portlet is also displayed at the completion of the new user creation process. Table F-4 explains the User Details data fields.

Figure F- 6: User details data area

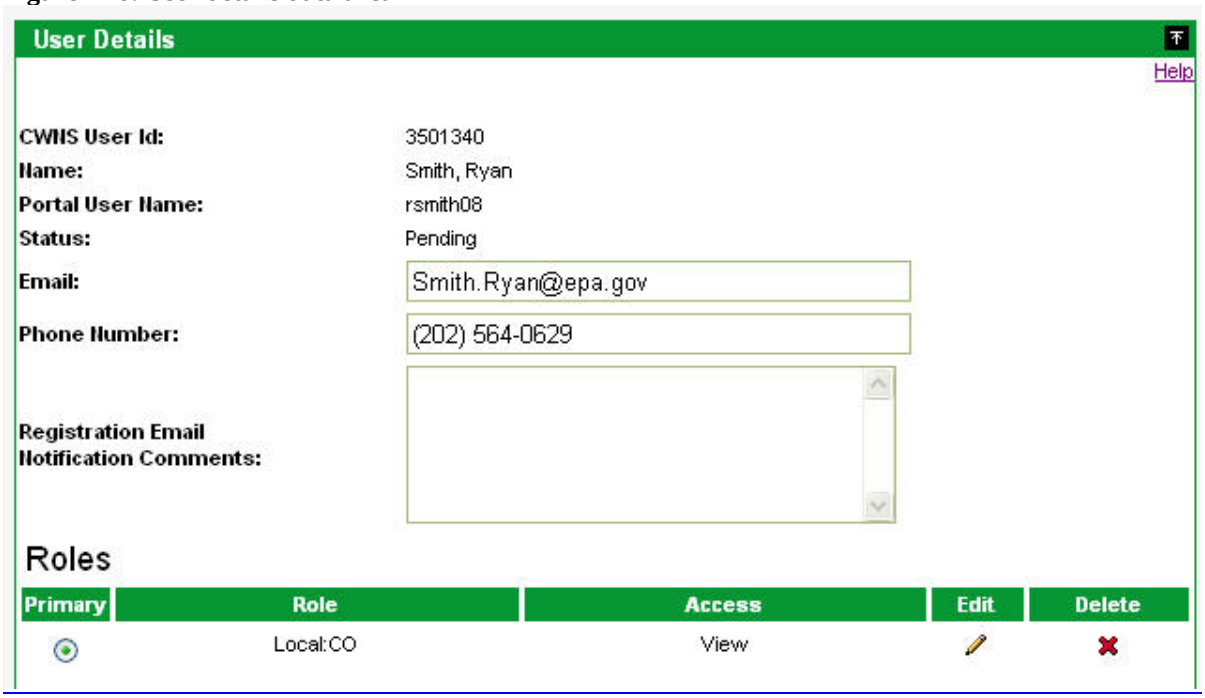


Table F- 4: Explanations of User Details data fields

Data Field	Explanation
User Details	
CWNS User ID	Unique identifier generated for CWNS users by the DEP. This field is view only.
Name	This user's name in the format "last name, first name." This field is view only.
Status	Displays whether the user is currently Active, Inactive, or Pending. Only State User Managers can change a user to Inactive.
Email	The user's email address. *Enter or edit the user's email address.*
Phone Number	The user's phone number. *Enter or edit the user's ten-digit telephone.*
Roles	
Role	Indicates the user's Role(s) (e.g., Federal, State, Local)
Access	Indicates the user's Access Levels. See Table 6-1 for an explanation of Access Levels.

The Local User Manager can only edit Local Users roles for users with access to the his/her assigned facilities/projects.

- *Click ✖ in the Delete column to remove a Local Role from the user. The Local User Manager cannot delete State and Federal roles.*

- *Click ✎ in the Edit column to grant the Local User additional access levels. This opens the Role Information data area (Figure F-7).*

  To give the user additional Access Level(s), check all the desired Access Level(s). Uncheck the box to revoke Access Level(s) from the user. Note: All CWNS users have View access.

  Select the radio button "Selected Facilities" to restrict user access to all or some of the Local User Manager's assigned facilities/projects. Click [add more..] *and a pop-up box with a list of the available facilities/projects is launched.*

  Enter a keyword in the box and click 🔍 *to search the list. The system searches the entered keyword on the Facility/Project Name only. Delete the keyword and click* 🔍 *to clear the search.*

  Check the boxes of the facilities/projects that should be assigned to the user and click [Select]. *The facilities/projects are listed in the Role Information area.*

  Revoke one or more facility/project from the user by highlighting the name and clicking [delete]. *Use the control key to select multiple facilities/projects.*

Remember to click [Save Role] *to save all changes made to current user. Click* [Cancel] *to abandon changes.*

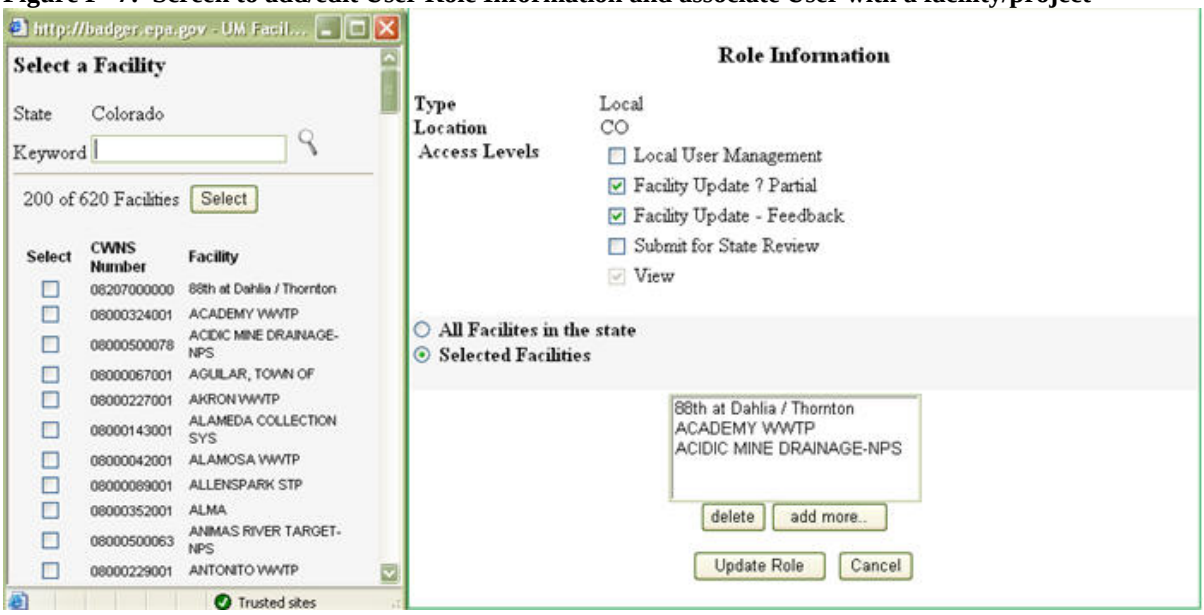



Figure F- 7: Screen to add/edit User Role Information and associate User with a facility/project