



WebEHRS Administrator Guide



Division of Environmental Health Services (DEHS)

Version 2.1

March 17, 2017



TABLE OF CONTENTS

Document Information	i
<i>Document History</i>	<i>i</i>
1.1 Overview	1
1.2 Background.....	1
1.3 Support	1
1.4 Common Buttons and Icons	1
2 Administrative Permissions	5
3 My Account.....	6
3.1 System Tools and Tables	7
3.1.1 General	8
3.1.2 Letters	9
3.2 View/Edit User Levels	12
3.3 User Level Administration.....	14
3.4 Maintaining User Accounts.....	17
3.4.1 Edit User Filters.....	21
3.4.2 Add System User	23
3.5 View Failed Logins	27
3.5.1 Transfer User	28
3.6 Feedback Report.....	29
3.7 Message Broadcast.....	32

DOCUMENT INFORMATION**DOCUMENT HISTORY**

Version	Date Effective	Details
1.0	January 23, 2012	Draft Document
2.0	April 3, 2013	Update Document to eliminate "Draft" verbiage
2.1	March 17, 2017	Updated based on enhancements to the system. Replaced screenshots. Editorial review.

1.1 OVERVIEW

In 2012, the Indian Health Service (IHS) Division of Environmental Health Services (DEHS) implemented a new web-based system to support its environmental health services programs. The new system, Web-based Environmental Health Reporting System (WebEHRS) supports the 12 Areas and headquarters of DEHS and provides system end user functionality as well as administration and support functionality. This Administrator Guide provides instructions and reference materials to users that have administrative permissions for WebEHRS.

1.2 BACKGROUND

This system replaces the previous DEHS-developed data system, also known as WebEHRS. WebEHRS was developed by Custom Data Processing, Inc. (CDP) in conjunction with IHS using the CDP commercial off-the-shelf (COTS) software, and customized to meet the IHS user needs. Acronyms and definitions included in this Guide and in WebEHRS are provided in Appendix A of the WebEHRS Users Guide.

1.3 SUPPORT












Support for WebEHRS is provided by both DEHS and CDP Customer Support.

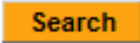

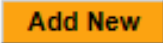

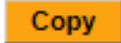








WebEHRS – Customer Support

Technical Assistance for:	Who to contact for assistance?
<ul style="list-style-type: none"> Acquiring a new user account Changing an existing user account 	Area DEHS Division Director
<ul style="list-style-type: none"> First-time log--in help System errors “How-To’s” 	CDP Customer Support 1-866-237-4814 customersupport@cdpehs.com
<ul style="list-style-type: none"> Missing features/wrong business rules 	WebEHRS Feedback Report
<ul style="list-style-type: none"> EH/IEH/IP Policy Questions 	Area EH/IEH/IP Contact

1.4 COMMON BUTTONS AND ICONS

WebEHRS uses a common set of buttons and icons to provide a consistent user interface. These buttons and icons are defined below.

Common Buttons and Icons		
Title	Button/Icon Graphic	Description
		<i>Click to view to documents.</i>
Scan		Scan in/import document for the record in the row.
Refresh icon		Left-Click one time to refresh the page with any modified Search Criteria.
Reset Filters icon		Left-Click one time to clear all Search Criteria.
Lookup Link icon		Left-Click to open a new window to search for a specific record.
More Selections icon		Left-Click one time to open an additional search window with more Search Criteria and options.
Reports/Complaints/Projects icon		Left-Click to access Reports, Complaints, and Projects (R/C/P).
Activities icon		Left-Click to access Activities.
Export Buttons & Icons		
PDF icon		Left-Click one time to export the results into a PDF report.
MS-Excel icon		Left-Click one time to export the results into a MS-Excel file/report.
MS-Word icon		Left-Click one time to export the results into a MS-Word file/report.
CSV icon		Left-Click one time to export the results into a CSV file (sometimes referred to as "Common Delimited File").

Common Buttons and Icons		
Title	Button/Icon Graphic	Description
Search-button		<i>Left Click one time to apply all Search Criteria and return results from the database.</i>
Clear-button		<i>Left Click one time to clear all Search Criteria and Search Results.</i>
Add New Record-button		<i>Left Click one time to add a new record.</i>
Edit Record-icon		<i>Left Click on the icon to edit the existing record.</i>
Copy Record-icon		<i>Left Click on the icon to add a new record by copying all of the demographics from an existing record.</i>
Show/View Record-icon		<i>Left Click on the icon to view the existing record.</i>
Checkbox		<i>Left Click in the box to select the record before proceeding to the next function.</i>
Drop Down List		<i>Left Click on the down arrow to view a list of all appropriate values that can be selected for that field.</i>
Save		<i>Left Click on the icon to save edits.</i>
Print		<i>Printer Icon</i>
Expand		<i>Left Click to expand Window.</i>
Collapse		<i>Left Click to collapse Window.</i>
Documents		<i>Documents exist in DMS for the record in the row. Left</i>

Common-Buttons-and-Icons		
Title	Button/Icon-Graphic	Description
Search-and-Pagination-Buttons		
<p>When a search page results in multiple records being found, it may also result in the data being displayed in groups, or pages. The image below will be present on all search pages and allows you to:</p> <ul style="list-style-type: none"> > Navigate from page to page > Proceed immediately to the last page > Go back immediately to the first page > Change the number of items shown per page 		
<p>The screenshot shows a pagination bar with the following elements from left to right: a double left arrow, a single left arrow, a text input field containing '1', the text 'of 16734', a single right arrow, a double right arrow, the text '167338 Items', a text input field containing '10', the text '/Page', and a 'Go' button. Green arrows point from labels above and below to these elements: 'First Page' points to the '1' input; 'Next Page' points to the single right arrow; 'Number of items per page' points to the '10' input; 'Previous Page' points to the single left arrow; 'Last Page' points to the double right arrow; and 'Apply new 'items per page'' points to the 'Go' button.</p>		
Calendar-Buttons		
Calendar-icon		Left-Click one time to open the Calendar-display.
Calendar-Display		<p>Left-Click one time on a date to select it.</p> <p>Left-Click on the arrows to navigate backward/forward in Months/Years.</p>

2 ADMINISTRATIVE PERMISSIONS

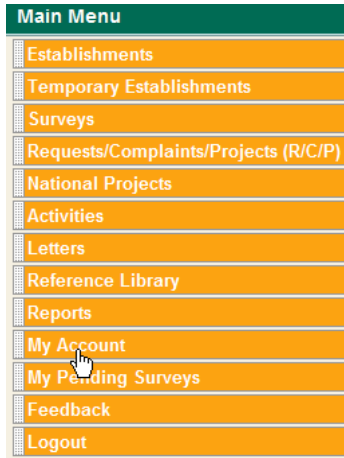
When users with system administrative permissions login to WebEHRS, the My Account screen displays tools and functions based on the user level/role. User permissions are determined by the User Level assigned on the User Account Profile. The System Administrator, Area DEHS designated users, and HQ EH Program staff are summarized in the Table below:

Administrative Permissions By Module					
User Level/Role	My Account Page	R/C/P	Nat'l Proj's National All	Nat'l Proj's National Specific	Feedback
System Administrator	Full Access	Full Access - Delete Projects created by lower level users	Full Access	Full Access	Full Access
System Backup Administrator	Full Access	Full Access - Delete Projects created by lower level users	Full Access	Full Access	Full Access
HQ EH Program Director	Only "User Functions" column and "Edit User Accounts"	Full Access - Delete Projects created by lower level users	Full Access	Full Access	Enter report only
HQ EH Program Deputy	Only "User Functions" column and "Edit User Accounts"	Full Access - Delete Projects created by lower level users	Full Access	Full Access	Enter report only
HQ Staff	Only "User Functions" column	Full Access - Delete Projects created by lower level users	Full Access	Full Access	Enter report only
Area EH Program Director	Only "User Functions" column and "Edit User Accounts"	Full Access - Delete Projects created by lower level users	Add Activities, Documents, and Surveys to "National All" projects	Add Activities, Documents, and Surveys to projects the user has permissions to	Enter report only
Area EH Program Deputy	Only "User Functions" column and "Edit User Accounts"	Full Access - Delete Projects created by lower level users	Add Activities, Documents, and Surveys to "National All" projects	Add Activities, Documents, and Surveys to projects the user has permissions to	Enter report only

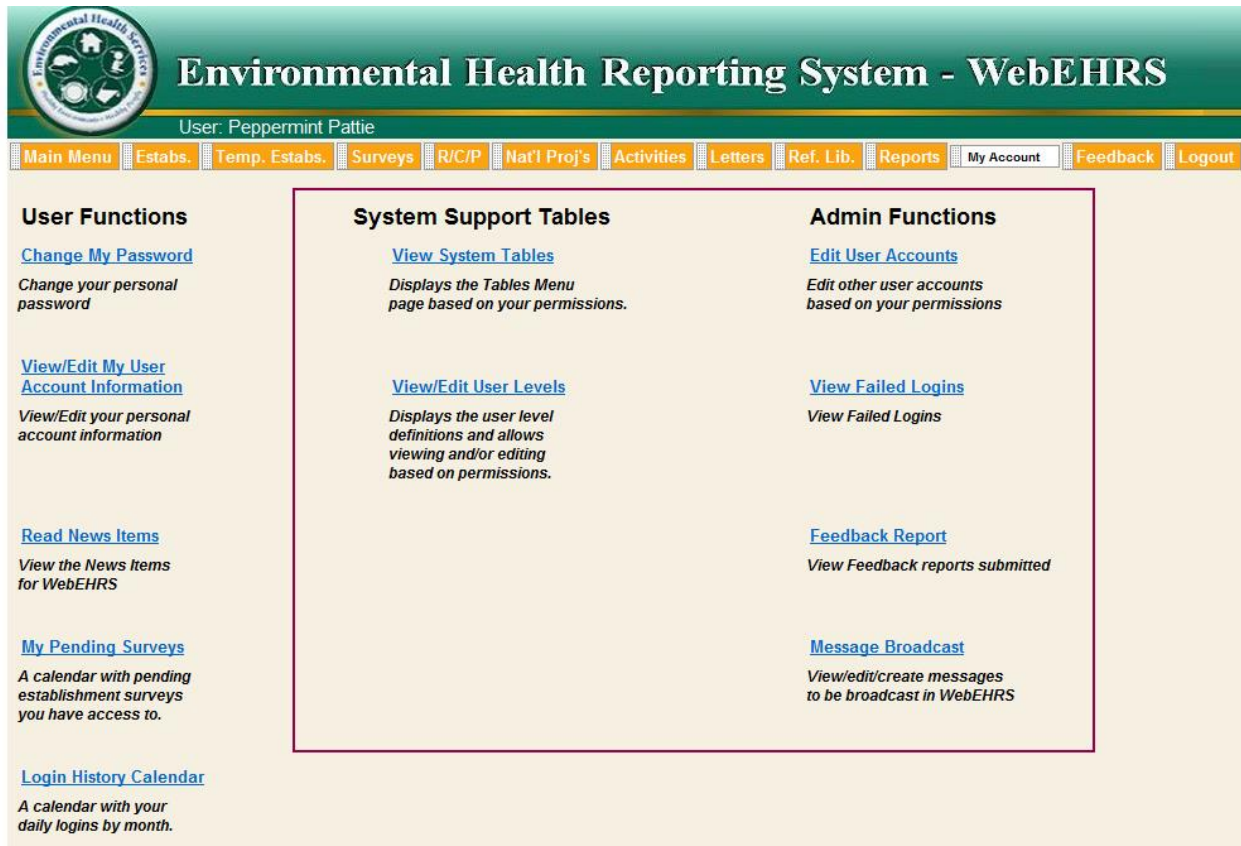
3 MY ACCOUNT

Many of the administrative tools and functions are provided in the My Account Module. To navigate to My Account, go to the Main Menu:

- Click on the My Account button.



WebEHRS displays the My Account screen.



Each user has a My Account page with functionality dependent on their assigned role and security. All users will have access to the components listed under User Functions, including: Change My Password, View/Edit My User Account Information, Read News Items, My Pending Surveys, and Login History. (See WebEHRS User Guide for instructions about using the User Functions items.)

Administrative Users also have System Support Tables and Admin Functions as shown in the center and right hand portion of the screen.

3.1 SYSTEM TOOLS AND TABLES

The System Tools and Tables function allows users to maintain the data within the support tables. To access Tools and Tables:

- Click on the View System Tables link on the My Account screen.

[View System Tables](#)

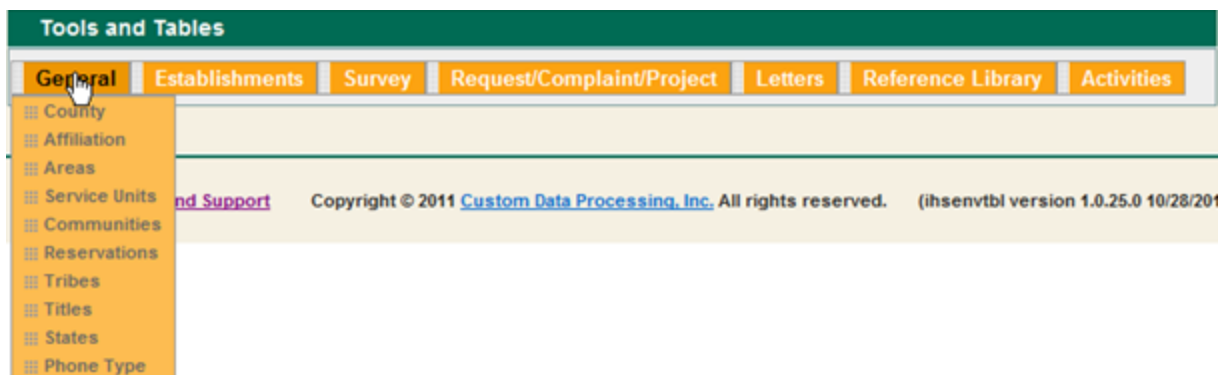
Displays the Tables Menu page based on your permissions.

WebEHRS displays the Tools and Tables screen.

Note: Only System Administrators can access and edit tables.

- Hover over the Tools and Tables menu buttons

A dropdown appears; each dropdown lists the support tables that are available for editing within that respective Module.



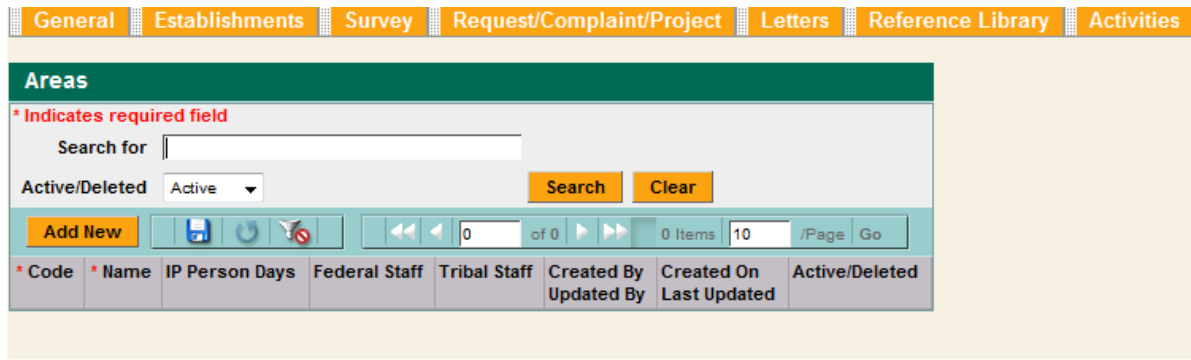
The General tab lists support tables that are used throughout the system.

To view or edit a support table:

- Hover over the desired tab to access the list.
- Scroll down the list and click on the name of the desired support table.

WebEHRS displays the Show Table Screen for the selected table. The Show Table Screen includes multiple panels:

- The top panel contains basic search options.
- A row of menu buttons separates the Search panel from the result set.
- The Show Table panel provides the user with a list of fields and values.



3.1.1 GENERAL

In this example, the Areas table has been selected. To display the fields for a table:

- Click on the Search button.

WebEHRS displays the Area support table entries in the Show Table panel. Each Area's demographics are displayed in the columns. In the following example, adding/editing support table entries occurs directly on the Show Table Screen.

* Code	* Name	IP Person Days	Federal Staff	Tribal Staff	Created By Updated By	Created On Last Updated	Active/Deleted
00	TUCSON	511.80			DSullivan	5/13/2011 10/3/2011	Active
N/A	Does Not Exist	1234.56			DSullivan	10/3/2011	Active
10	ABERDEEN	2638			DSullivan	5/13/2011 11/17/2011	Active
11	BEMIDJI	2130.70				5/13/2011 9/29/2011	Active
20	ALBUQUERQUE	1470.20			JGrady	5/13/2011 1/6/2012	Active
23	HEADQUARTERS WEST	0				5/13/2011 9/29/2011	Active
30	ALASKA	3083.40				5/13/2011 9/29/2011	Active
40	BILLINGS	1738.70				5/13/2011 9/29/2011	Active
50	OKLAHOMA	5309.20				5/13/2011 9/29/2011	Active
51	NASHVILLE	588.90				5/13/2011 9/29/2011	Active

To edit an existing Area:

- Modify any of the available fields in the Show Table panel.
- Click on the Save diskette icon to save changes.

To add a new Area:

- Click on the Add New button.

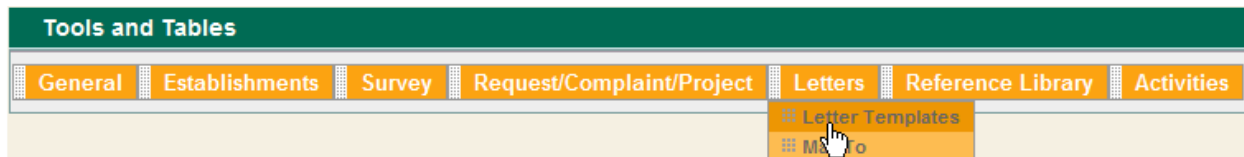
WebEHRS adds a new blank row to the screen.

- Complete all required fields.
- Click on the Save icon to save the new entry.

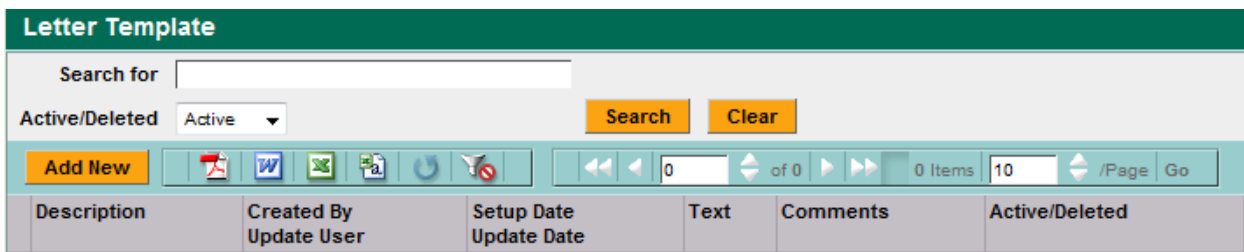
3.1.2 LETTERS

In this example, the Letter Templates table has been selected. To access the Letter Templates support table:

- Hover over the Letters tab.
- Click on the Letter Templates selection in the dropdown list.



WebEHRS displays the Letter Template Show Table Screen and allows the user to search, view, edit, and create new letter templates.



To create a new Letter Template:

- Click on the Add New button.

WebERHS displays the Add Letter Template screen and allows the user to create a new letter template. To continue with the new Letter Template:

- Enter text for a Description.
- Enter text for the Letter Body.
- Enter comments (Optional).

- Click on the Save button.

Add Letter Template Cancel

*** Indicates required field**

*** Description**

Font Arial Size 1

This letter is to notify you that we have verified all outstanding violations identified in our most recent survey have been corrected. On behalf of IHS we thank you for your attention to this matter.

*** Letter Body**

Us this template for notification to the owner or manager that violations haven be corrected.

The text entered in the comments box WILL NOT appear in the letter generated. This is for documentation and search purposes only.

Comments

(Maximum characters: 2000)

You have 1906 characters left.

Save
Cancel

WebEHRS saves the new Letter Template and returns the user to the Letter Template Show Table Screen, displaying only the new template in the Show Table panel.

Letter Template						
Search for <input style="width: 200px;" type="text"/>						
Active/Deleted Active		Search		Clear		
Add New				1 of 1	1 Items	10 /Page Go
Description	Created By Update User	Setup Date Update Date	Text	Comments	Active/Deleted	
Standard Notification Letter	PPattie PPattie	1/19/2012 1/19/2012	This letter is to notify you that we have verified all outstanding violations identified in our most...	Us this template for notification to the owner or manager that violations haven be corrected.	Active	

Administrators may also view, edit, and delete templates. To edit a template:

- Click on the edit icon for the desired Letter Template.

Letter Template						
Search for <input type="text"/>						
Active/Deleted		Active		Search Clear		
Add New				1 of 1 2 Items 10 /Page Go		
Description	Created By	Update User	Setup Date	Update Date	Comments	Active/Deleted
Empty Template	dibuchanan	dbuchanan	2/21/2012	4/20/2012	Letter text This is an empty template that can be used to generate a letter that does not fit any of the existing templates....	Active
My Test Letter	JGrady	JGrady	1/13/2017	1/13/2017	Letter text Test template created by CDP-JG	Active

WebEHRS displays the Edit Letter Template screen and allows the user to make changes. Hovering over the [Letter Text](#) link presents a pop-up that contains the complete text for previewing, as shown below.

The screenshot shows the 'Letter Template' table with a 'Text' pop-up window. The pop-up window contains the following text:

This is a test letter template setup during the review/update of the IHS User guide documentation.

The user may Save the edits or Cancel to return.

3.2 VIEW/EDIT USER LEVELS

System Administrators have permissions to maintain User Level templates. User Level templates are assigned to the User Account Profile and are used to restrict access to Modules/Features within WebEHRS. User Level templates are organized around job functions. To access user levels:

- Click on the View/Edit User Levels link on the My Account Screen.

[View/Edit User Levels](#)

Displays the user level definitions and allows viewing and/or editing based on permissions.

WebEHRS displays a Show Table Screen with a list User Levels.

User Levels Return to My Account						
Description <input type="text" value="All"/>						
Active/Deleted <input type="text" value="All"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>						
<input type="button" value="Add New"/> <input type="button" value="Restriction Template"/> 1 of 1 19 Items 20 /Page Go						
Description	Code	Level Number	Setup Date	Update Date	Active/Deleted	
<input type="checkbox"/> CDP Admin	CDP	99	7/5/2011	10/21/2011	Active	
<input type="checkbox"/> System Administrator	SA	90	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> System Backup Administrator	SBA	90	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> HQ EH Program Director	HQEH-PDIR	80	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> HQ EH Program Deputy	HQEH-PD	80	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> HQ Staff	HQ-S	75	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Program Director	AEH-PDIR	70	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Program Deputy	AEH-PD	70	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Staff	AEH-S	65	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Program Manager	DEH-PM	60	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Program Deputy	DEH-PD	60	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Staff	DEH-S	55	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Field EH Program Manager	FEH-PM	50	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Field EH Staff	FEH-S	45	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> COSTEP	COSTEP	40	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Read Only	RO	35	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Test Level	TL	1	10/20/2011	10/20/2011	Active	
<input type="checkbox"/> Test 2	T2	0	10/21/2011	10/21/2011	Active	
<input type="checkbox"/> Test 3	T3	0	10/21/2011	10/21/2011	Active	

To view the details for a User Level:

- Click on the Magnifier icon.

WebEHRS displays the Show User Level screen with information about the User Level.

Show User Level

Active/Deleted Active

Description CDP Admin

Code CDP

Level Number 99

User Level Summary

Setup Date 7/5/2011 1:45 PM

Update Date 10/21/2011 9:09 AM

Create User

Update User [Tom](#)

Users may edit existing User Level templates. To edit a User Level:

- Click on the Edit icon.

WebEHRS displays the Edit User Level screen.

Edit User Level

* Indicates required field

* Active/Deleted

* Description

* Code

* Level Number

DMS Read Only?

Font Arial

Size 1

This User Level is used for CDP Admin and has all the permissions that an EH System Administrator.

User Level Summary

Save Cancel

After updating the User Level, the user can Save the changes or click Cancel to return.

3.3 USER LEVEL ADMINISTRATION

System Administrators have rights to maintain the Restriction Template for each User Level. The Restriction Template is used to enable or disabled specific features/screens within WebEHRS.

To edit a User Level's Restriction Template:

- Use the checkbox to select the desired User Level from the Show Table panel.
- Click on the Restriction Template button.

User Levels Return to My Account						
Description: All <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>						
Active/Deleted: All <input type="text"/> <input type="button" value="Add New"/> <input type="button" value="Restriction Template"/> <input type="text" value="1"/> of 1 <input type="text" value="19 Items"/> <input type="text" value="20"/> /Page <input type="button" value="Go"/>						
Description	Code	Level Number	Setup Date	Update Date	Active/Deleted	
<input type="checkbox"/> CDP Admin	CDP	99	7/5/2011	1/17/2012	Active	
<input type="checkbox"/> System Administrator	SA	90	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> System Backup Administrator	SBA	90	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> HQ EH Program Director	HQEH-PDIR	80	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> HQ EH Program Deputy	HQEH-PD	80	7/5/2011	8/10/2011	Active	
<input checked="" type="checkbox"/> HQ Staff	HQ-S	75	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Program Director	AEH-PDIR	70	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Program Deputy	AEH-PD	70	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Area EH Staff	AEH-S	65	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Program Manager	DEH-PM	60	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Program Deputy	DEH-PD	60	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> District EH Staff	DEH-S	55	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Field EH Program Manager	FEH-PM	50	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Field EH Staff	FEH-S	45	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> COSTEP	COSTEP	40	7/5/2011	8/10/2011	Active	
<input type="checkbox"/> Read Only	RO	35	7/5/2011	1/17/2012	Active	
<input type="checkbox"/> Test Level	TL	1	10/20/2011	10/20/2011	Active	
<input type="checkbox"/> Test 2	T2	0	10/21/2011	10/21/2011	Active	
<input type="checkbox"/> Test 3	T3	0	10/21/2011	10/21/2011	Active	

WebEHRS displays the User Levels Restrictions screen and allows the user to edit the restrictions. The template screen has multiple panels including the following:

- User Level: Identifies the User Level being edited.
- Restrictive Security Template: Identifies the specific functions that are currently restricted from the User Level.
- Functions that can be added to default template: Identifies the specific functions that are currently enabled for the User Level.

User Level: HQ Staff

Restrictive Security Template: These functions will not be accessible by users assigned the level above by default [Return to User Levels](#)

Function Type: All

Description: All

1 of 1 4 Items 10 /Page Go

Description	Function Type	Default Hidden?
<input type="checkbox"/> Broadcast Page	Security	Yes
<input type="checkbox"/> CDP Only Areas	Security	Yes
<input type="checkbox"/> Failed Logins Page	Security	Yes
<input type="checkbox"/> Feedback Report Page	Security	Yes

Functions that can be added to default template for user level above

Search Description:

Function Type: All

Description: All

1 of 1 10 Items 10 /Page Go

Description	Function Type	Default Hidden?
<input type="checkbox"/> Activity Certificate Printing	Activities	No
<input type="checkbox"/> Add/Edit Establishment Data	Establishments	No
<input type="checkbox"/> Add/Edit Establishment Permit Info	Establishments	Yes
<input type="checkbox"/> Establishment Letter Printing	Letter Printing	No
<input type="checkbox"/> Add/Edit Reference Library Data	Reference Library	No
<input type="checkbox"/> Add/Edit Supplemental RCP records	Request/Complaint/Projects	No
<input type="checkbox"/> Add News Items	Security	Yes
<input type="checkbox"/> Add/Edit System User Accounts	Security	No
<input type="checkbox"/> Add/Edit Surveys	Surveys	No
<input type="checkbox"/> Test for Tables App Security	Tables	No

Update the User Level Restrictions as needed.

To enable a function that is currently restricted:

- Use the checkbox to select the desired function from the Restrictive Security Template Show Table panel.
- Click on the Delete Restriction button.

Restrictive Security Template: These functions will not be accessible by users assigned the level above by default [Return to User Levels](#)

Function Type: All

Description: All

1 of 1 4 Items 10 /Page Go

Description	Function Type	Default Hidden?
<input type="checkbox"/> Broadcast Page	Security	Yes
<input type="checkbox"/> CDP Only Areas	Security	Yes
<input type="checkbox"/> Failed Logins Page	Security	Yes
<input checked="" type="checkbox"/> Feedback Report Page	Security	Yes

WebEHRS refreshes the User Levels Restrictions screen and shows the newly enabled function in the Restrictive Security Template Show Table panel.

<input type="checkbox"/> Description	Function Type	Default Hidden?
<input type="checkbox"/> Broadcast Page	Security	Yes
<input type="checkbox"/> CDP Only Areas	Security	Yes
<input type="checkbox"/> Failed Logins Page	Security	Yes

To restrict a function that is currently enabled:


- Use the checkbox to select the desired function from the Functions that can be added to default template in the Show Table panel.
- Click on the Hide this item from this user level button.

Functions that can be added to default template for user level above

Search Description **Search** **Clear**


Function Type All

Description All

Hide this item from this user level  1 of 2 11 Items 10 /Page Go

<input type="checkbox"/> Description	Function Type	Default Hidden?
<input type="checkbox"/> Activity Certificate Printing	Activities	No
<input type="checkbox"/> Add/Edit Establishment Data	Establishments	No
<input type="checkbox"/> Add/Edit Establishment Permit Info	Establishments	Yes
<input type="checkbox"/> Establishment Letter Printing	Letter Printing	No
<input type="checkbox"/> Add/Edit Reference Library Data	Reference Library	No
<input type="checkbox"/> Add/Edit Supplemental RCP records	Request/Complaint/Projects	No
<input type="checkbox"/> Add News Items	Security	Yes
<input type="checkbox"/> Add/Edit System User Accounts	Security	No
<input type="checkbox"/> Feedback Report Page	Security	Yes
<input checked="" type="checkbox"/> Add/Edit Surveys	Surveys	No

WebEHRS refreshes the User Levels Restrictions screen and shows the newly restricted function in the Restrictive Security Template Show Table panel.

Hide this item from this user level  1 of 1 10 Items 10 /Page Go

<input type="checkbox"/> Description	Function Type	Default Hidden?
<input type="checkbox"/> Activity Certificate Printing	Activities	No
<input type="checkbox"/> Add/Edit Establishment Data	Establishments	No
<input type="checkbox"/> Add/Edit Establishment Permit Info	Establishments	Yes
<input type="checkbox"/> Establishment Letter Printing	Letter Printing	No
<input type="checkbox"/> Add/Edit Reference Library Data	Reference Library	No
<input type="checkbox"/> Add/Edit Supplemental RCP records	Request/Complaint/Projects	No
<input type="checkbox"/> Add News Items	Security	Yes
<input type="checkbox"/> Add/Edit System User Accounts	Security	No
<input type="checkbox"/> Feedback Report Page	Security	Yes
<input type="checkbox"/> Test for Tables App Security	Tables	No

3.4 MAINTAINING USER ACCOUNTS

Administrative Users have rights to maintain User Accounts within WebEHRS. To access User Accounts:

- Click on the My Account button in the menu bar.
- Click on the Edit User Accounts link.

Edit User Accounts

Edit other user accounts based on your permissions

WebEHRS displays the System User Show Table Screen and allows the user to search, view, and edit user accounts. The System Users Show Table Screen includes multiple panels:

- The top panel contains the basic search options.
- A row of Menu Buttons separates the Search panel from the result set. Menu icons and buttons include icons to export the results, scroll arrows and page specify window, and buttons to add user, edit profile, edit data filters, apply restrictions, transfer user(s), and view audit information.
- The Show Table panel displays the search results and allows the user to select a user account for editing.

To perform a search:

- Enter the search criteria using filters.
- Click on the Search button.

WebEHRS displays the search results in the Show Table panel.

Username	Name	Email Address	User Status	Login Prevented?	User Level	Active/Deleted	Primary Area
CBrown	Charlie Brown	ametcaif@cdpehs.com	InProcess	No	Field EH Staff	Active	OKLAHOMA

To view an existing user account profile:

- Click on the magnifier icon.

WebEHRS displays the user account demographics in the Show System User screen.

To edit an existing user account profile:

- Click on the edit icon.

WebEHRS displays the user account in the Edit System User screen and allows the user to edit the user profile.

Note: User Status and Primary Area may not be edited from this screen.

Edit System User
Cancel

* Indicates required field

* Username

User Status

* Active/Deleted

* Prevent Login?

* First/Last Name

* Office Name/Description

* Physical Office Address
2nd address line is NOT required.

* City * State * ZIP Code

* Primary Phone Ext. * Type

Alternate Phone Ext. Type

Fax

* Time Zone * Use Daylight Saving? * Mobile User?

* Email Address

* Title

* Primary Area * User Level

* Employed By * Works For

Mailing Information Check here if same as Physical Address

* Mailing Address:
2nd address line is NOT required.

* City * State * Mailing ZIP Code

Save and Return
Save and Continue
Cancel

Edit User Filters Cancel

Username	jfgcdp	First/M/Last Name	John Grady
Title	Programming manager	User Level	CDP Test
User Status	Finalized		

Areas, Service Units, Reservation Codes, Tribes and Community Codes

Page will first load with only Areas. Once you select your area(s) with Ctrl-click, click the "Select Areas" button. This will result in the service units, tribes AND reservation code pick-lists being made visible and populated. You can then utilize the Ctrl-click process to select all service units. Then click the "Select SU's" button, and you will see community codes being visible and populated.

* Indicates required field

<p>* Area(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> Please Select All ALASKA ALBUQUERQUE BEMIDJI BILLINGS CALIFORNIA GREAT PLAINS HQE HQW NASHVILLE National All National Specific NAVAJO OKLAHOMA PHOENIX PORTLAND TUCSON </div> <div style="text-align: center; margin-top: 5px; background-color: #FFA500; padding: 5px; width: 100px; float: right;">Select Areas</div>	<p>* Service Unit(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Please Select All </div> <div style="text-align: center; margin-top: 5px; background-color: #FFA500; padding: 5px; width: 100px; float: right;">Select SU's</div>	<p>* Community Code(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Please Select All </div>
<p>* Reservation Code(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px; margin: 0 auto; width: 150px;"> Please Select All </div>		
<p>* Tribe(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px; margin: 0 auto; width: 150px;"> Please Select All </div>		

Establishment Types, Survey Types and National Project (Supplemental R/C/P) Types

<p>* Establishment Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> Please Select All 01 Comprehensive Health Care Referral Facility 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer 02.3 Hospital w/o Surgery /w DEHS Funded Safety Officer 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer 03.1 Health Center w/ DEHS Funded Safety Officer 03.2 Health Center w/ no DEHS Funded Safety Officer 04 School Health Center </div>	<p>* Survey Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> Please Select All None Barber and Beauty Survey Drinking Water Survey FDA 2001 Food Survey FDA 2005 Food Survey FDA 2009 Food Survey FDA 2013 Food Survey1 Healthcare Survey </div>	<p>National Project (Supplemental R/C/P) Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Please Select All Other IP PM 16-20 </div>
---	--	--

Save/InProgress	Save/Finalized	Clear Filters	Cancel
-----------------	----------------	---------------	--------

Note: If the Mailing Address is the same as the Physical Office Address, use the “Click here if same...” checkbox to copy the address information.

To save changes and return to the System Users Show Table screen:

- Click on the Save and Return button.

To save changes and continue to add/edit Data Filters:

- Click on the Save and Continue button.

Note: Data Filters are explained in the Edit User Filters section of this WebEHRS Administrator Guide.

To leave the screen without saving changes:

- Click on the Cancel button.

3.4.1 EDIT USER FILTERS

Data Filters must be assigned to a User Account profile before the user account can be “Finalized” and allow login to WebEHRS. WebEHRS will restrict or enable access to records based upon the Data Filters assigned. To edit Data Filters:

- From the System User Show Table screen: Use the checkbox to select the desired User Account from the Show Table panel.
- Click on the Data Filters button.

Username	Name	Email Address	User Status	Login Prevented?	User Level	Active/Deleted	Primary Area
<input type="checkbox"/> CBrown_11012011_102233	Charlie Brown	ametcaif@odpehs.com_11012011_102233	InProcess	Yes	Field EH Staff	Deleted	ALBUQUERQUE
<input type="checkbox"/> CBrown_10312011_163004	Charlie Brown	ametcaif@odpehs.com_10312011_163004	InProcess	Yes	Field EH Staff	Deleted	OKLAHOMA
<input checked="" type="checkbox"/> CBrown	Charlie Brown	annie.metcaif@odpehs.com	Finalized	No	Field EH Staff	Active	PHOENIX

WebEHRS displays the Edit User Filters screen and allows the administrative user to edit the filter selections. The top panel of the screen displays basic information from the User Profile for reference.

The Areas, Service Units, and Community Codes section provide access to WebEHRS records based upon “where” the user is located.

The Establishment Types, Survey Types, Tribes, and National Projects section provide access to WebEHRS records based upon the user’s job function (or “what” the user does).

National Project (Supplemental R/C/P) Type(s)

Please Select
 All
 Unit Test Project #1
 Not Applicable
 None
 Car Seat Distribution Project
 National Specific Project for Somethin'

Save/InProgress Save/Finalized Clear Filters Cancel

Edit User Filters Cancel

Username jfgcdp **First/M/Last Name** John Grady
Title Programming manager **User Level** CDP Test **User Status** Finalized

Areas, Service Units, Reservation Codes, Tribes and Community Codes

Page will first load with only Areas. Once you select your area(s) with Ctrl-click, click the "Select Areas" button. This will result in the service units, tribes AND reservation code pick-lists being made visible and populated. You can then utilize the Ctrl-click process to select all service units. Then click the "Select SU's" button, and you will see community codes being visible and populated.

* Indicates required field

*** Area(s)**

Please Select
 All
 ALASKA
 ALBUQUERQUE
 BEMIDJI
 BILLINGS
 CALIFORNIA
 GREAT PLAINS
 HQE
 HQW
 NASHVILLE
 National All
 National Specific
 NAVAJO
 OKLAHOMA
 PHOENIX
 PORTLAND
 TUCSON

Select Areas

*** Service Unit(s)**

Please Select
 All

Select SU's

*** Community Code(s)**

Please Select
 All

*** Reservation Code(s)**

Please Select
 All

*** Tribe(s)**

Please Select
All

Establishment Types, Survey Types and National Project (Supplemental R/C/P) Types

* Establishment Type(s)	* Survey Type(s)	National Project (Supplemental R/C/P) Type(s)
<div style="border: 1px solid #ccc; padding: 2px;"> Please Select All 01 Comprehensive Health Care Referral Facility 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer 02.3 Hospital w/o Surgery /w DEHS Funded Safety Officer 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer 03.1 Health Center w/ DEHS Funded Safety Officer 03.2 Health Center w/ no DEHS Funded Safety Officer 04 School Health Center </div>	<div style="border: 1px solid #ccc; padding: 2px;"> Please Select All None Barber and Beauty Survey Drinking Water Survey FDA 2001 Food Survey FDA 2005 Food Survey FDA 2009 Food Survey FDA 2013 Food Survey1 Healthcare Survey </div>	<div style="border: 1px solid #ccc; padding: 2px;"> Please Select All Other IP PM 16-20 </div>

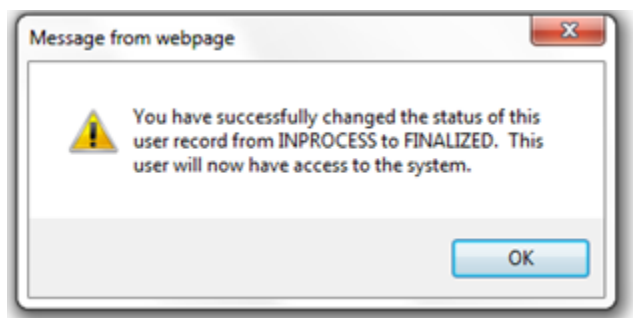
Save/InProgress
Save/Finalized
Clear Filters
Cancel

To save edits to a User Account's Data Filters:

- Click on the Save/InProgress button.
- Or Click on the Save/Finalized button.

Note: Users will not be able to login until the User Account has been Save/Finalized.

When a User Account is Save/Finalized, WebEHRS displays a pop-up confirming that the account is Finalized. Changes to a User Account's Data Filters will result in an automatic email from WebEHRS to the User Account that was changed. WebEHRS will also send an automated email to the Administrative User Account that made the changes.



3.4.2 ADD SYSTEM USER

To add a new user from the System Users Show Table screen:

- Click on the Add User button.

WebEHRS displays the Add System User screen. Required fields are indicated by the red Asterisk (*) and include:

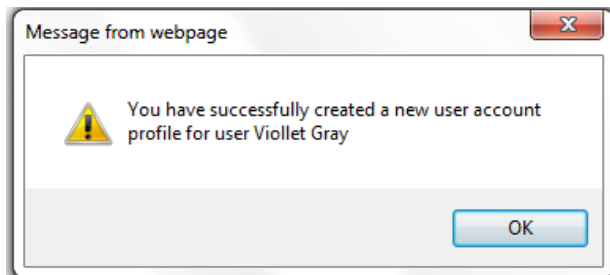
- First/Last Name,
- Office Name Description,
- Physical Office Address,
- Primary Phone and Type,
- Time Zone, Daylight Savings, Mobile User,
- Email Address,
- Title,
- Primary Area, User Level,
- Employed by, Works for,
- Mailing Information.

- Complete required fields.

- Click on the Save and Return button to complete the User Account profile ONLY.
- Or click on the Save and Continue button to complete the User Account profile and proceed to setup Data Filters.

Note: Data Filters must be assigned to the user account before the account will be granted login access.

If the user chooses Save and Continue, WebEHRS displays a window indicating that a new user account profile has been created.



- Click on the OK button to close the pop-up.

WebEHRS displays the Edit User Filters screen and allows the user to add filters for the new user. To continue with the new user account:

- Complete required fields.
- Click on the Save/Finalized button to set the Data Filters and enable login access.
- Or click on the Save/InProgress button to store the Data Filter selections but prevent login access.

Note: A user with administrative privileges may return to the Data Filters page to finish setting the Data Filters and Finalize the user account at any time.

Edit User Filters Cancel

Username VGray First/M/Last Name Violet Gray

Title Area EH Program Director User Level Area EH Program Director User Status InProcess

Areas, Service Units and Community Codes

Page will first load with only Areas. Once you select your area(s) with Ctrl-click, click the "Select Areas" button. This will result in the service units AND reservation code pick-lists being made visible and populated. You can then utilize the Ctrl-click process to select all service units. Then click the "Select S-U's" button, and you will see community codes being visible and populated.

* Indicates required field

*** Area(s)**

Please Select
All
ABERDEEN
ALASKA
ALBUQUERQUE
BEMIDI
BILLINGS
CALIFORNIA
CDP
Does Not Exist

Select Areas

*** Service Unit(s)**

Please Select
All
COLORADO RIVER
DUCK VALLEY
ELKO
FORT YUMA
GILA RIVER HCC
KEAMS CANYON
NON SERVICE UNIT
PHOENIX

Select S-U's

*** Community Code(s)**

Please Select
All

*** Reservation Code(s)**

Please Select
All
AK-CHIN MARICOPA
BATTLE MOUNTAIN COLONY
BENTON PAUTE
BIG PINE
BISHOP
BRIDGEPORT
CAMP ANTELOPE
CAMP VERDE-MIDDLE VERDE

Establishment Types, Survey Types, Tribes and National Project (Supplemental R/C/P) Types

*** Establishment Type(s)**

Please Select
All
01 Comprehensive Health Care Referral Facility
02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer
02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer
02.3 Hospital w/o Surgery /w DEHS Funded Safety Officer
02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer
03.1 Health Center w/ DEHS Funded Safety Officer
03.2 Health Center w/ no DEHS Funded Safety Officer
04 School Health Center

*** Survey Type(s)**

Please Select
All
None
Barber and Beauty Survey
Drinking Water Survey
FDA 2001 Food Survey
FDA 2005 Food Survey
FDA 2009 Food Survey
Healthcare Survey
Home Assessment Survey

*** Tribe(s)**

Please Select
All
(141) ABSENTEE-SHAWNEE TRIBE, OK
(710) AFOGNAK
(263) AGUA-CALIENTE BAND CAHULLA INDIANS, CA
(711) AHKIOK-KAGUYAK NATVE CORPORATION
(500) AHTNA, INC
(360) AK CHN INDIAN COMM. PAPAGO IND, AZ
(501) AKHIOK, NATVE VLLAGE OF AKHIOK, AK
(502) AKIACHAK, NATVE VLLAGE OF AKIACHAK, AK

National Project (Supplemental R/C/P) Type(s)

Please Select
All
Unit Test Project #1

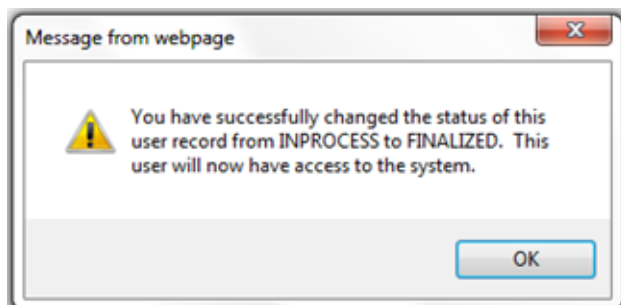
Save In Process

Save Finalized

Clear Filters

Cancel

WebEHRS displays a pop-up message notifying the creating user of the new user account's status.



3.5 VIEW FAILED LOGINS

System Administrators, System Backup Administrators, and CDP Customer Support representatives have access to view failed login attempts. To view failed logins:

- Click on the View Failed Logins link on the My Account screen.

[View Failed Logins](#)

View Failed Logins

WebEHRS displays the Failed Login screen and allows the user to search, view, and export information about failed logins. Use the Search Filters to display a listing of failed login attempts in the show table panel.

- Set filters and click on the Search button.

User Name Entered	Password	Date/Time of Attempt	Reason Failed	IP Address	Session ID
-------------------	----------	----------------------	---------------	------------	------------

WebEHRS displays all failed login attempts (within the parameters provided) in the show table panel. The “Password” column is intentionally hidden. Highlighting the hidden text allows the user to read what was entered for a password value.

- Point the mouse to the blank “Password” field in the show table panel.
- Left-Click and hold in the box and scroll to the right or left to highlight the text.

Failed Login Attempts						Return to My Account
From		<input type="text"/>	to	<input type="text"/>		
User name containing		<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>		
		1 of 109		1082 Items	10	/Page Go
User Name Entered	Password	Date/Time of Attempt	Reason Failed	IP Address	Session ID	
jgrady	ick1960	1/19/2012 3:38:46 PM	Bad password	172.16.17.3	4kz1neysq033stt4kjanl2ky	
TFeltenberger		1/19/2012 3:37:52 PM	Concurrent user login	172.16.17.3	b1ieripuyojsc5fmslrrkgpt	
PPattie		1/19/2012 2:20:48 PM	Bad password	172.16.17.3	hxuz3ck2elirdg5ucb03d42d	
jwilson		1/19/2012 1:18:37 PM	Concurrent user login	172.16.17.3	wpicxlfierpy5zuf0011ru4p	
bburrows		1/19/2012 1:15:09 PM	User account InProcess	192.168.1.1	n4cqjw1hyiricniclclg3w	
bburrows		1/19/2012 1:14:58 PM	User account InProcess	192.168.1.1	n4cqjw1hyiricniclclg3w	
jwilson		1/19/2012 10:55:59 AM	Bad password	172.16.17.3	yi3e34wvtzpfhyxf3kk3zfl	
pkothapalli		1/19/2012 9:52:01 AM	Bad password	127.0.0.1	cxuxqvftakhpz4bd5xen2iy	
tcannon		1/18/2012 5:29:16 PM	Concurrent user login	66.249.66.1	mym02ooen35urssahioozkwp	
TFeltenberger		1/18/2012 4:39:44 PM	Concurrent user login	172.16.17.3	ladk5xucf4mn3jz0le113zdw	

Note: IP addresses are also provided to aid in system support but are masked for security purposes.

3.5.1 TRANSFER USER

WebEHRS provides the User Account Transfer feature for a user who moves to a different Area. This will allow the losing Area to electronically transfer a user to the gaining Area within WebEHRS. To transfer a user:

- From the System User Show Table screen: Use the checkbox to select the desired User Account from the Show Table panel.
- Click on the Transfer button.

System Users								
Search Username, Name		User Status		All	Primary Area		All	
User Level		Active/Deleted		All	<input type="button" value="Search"/>			
						<input type="button" value="Clear"/>		
		1 of 1		1 Items	10	/Page Go		
<input type="button" value="Add User"/>		<input type="button" value="Edit Profile"/>		<input type="button" value="Data Filters"/>		<input type="button" value="Restrictions"/>		
						<input type="button" value="Transfer"/>		
						<input type="button" value="Audit"/>		
Username	Name	Email Address	User Status	Login Prevented?	User Level	Active/Deleted	Primary Area	
<input checked="" type="checkbox"/>	CBrown	Charlie Brown	ametcalf@odpehs.com	InProcess	No	Field EH Staff	Active	OKLAHOMA

WebEHRS displays the Transfer System User screen and allows the administrative user to enter the transfer information.

- Select the Area the user is to be transferred to using the dropdown list.
- Enter an Effective Date.

Note: Transfers can be scheduled in advance. The user being transferred will still have access to WebEHRS with his/her current settings until 12:01 AM Eastern Time of the Effective Date.

- Click on the Submit Transfer button.

WebEHRS displays a pop-up message indicating that a transfer has been successfully completed.

Note: If the transfer was completed incorrectly, contact CDP Customer Support for assistance.



- Click on the OK button to close the pop-up.

On the Effective Date selected by the losing Area, WebEHRS

- Deletes the user account from the losing Area's user accounts. (Historical information remains intact as it does now for the old WebEHRS.)
- Adds the user as a pending the new account for the gaining Area by copying the account profile. It is set up with the original username.

Once a User Account has been transferred to the gaining Area, the user account profile status will revert back to "InProgress." An Administrative User from the gaining Area must assign Data Filters to this newly transferred user account before it will become an active account.

Note: Data Filters are explained in the Edit User Filters section of this Admin User Guide.

3.6 FEEDBACK REPORT

System Administrators also have access to the Feedback Report. To access:

- Click on the Feedback Report link on the My Account screen.

[Feedback Report](#)

View Feedback reports submitted

WebEHRS displays the User Feedback Show Table screen and allows the user to search, view, add new, and export feedback information. Use the Search Filters to display a listing of submitted feedback in the show table panel.

- Set filters and click on the Search button.

WebEHRS displays the feedback submissions (within the parameters provided) in the show table panel. The User Feedback Show Table panel allows Administrative Users to quickly scan through the feedback.

- Hover over the fields within the show table panel to see a pop-up of the full text.

Record ID	Submitted By	Submitted On	Did you have any problem?	If yes, provide details	What would you change?	What would you like to see added?	What would you like to see removed?	What other information would you...	Status Updated By/On	Attachment
642	ToBonk	11/23/2016	No	This is a test feedback...					Open ToBonk / 11/23/2016	
641	JGates	8/19/2016	Yes	den	den2	den3	den4	den5	Open JGates / 8/19/2016	
640	TBonk	8/19/2016	No	aaaaaaaaaaaaaaaa	bbbbbbbbbbbbbbbb	cccccccccccccccc		dddddddddddddddd	Open TBonk / 8/19/2016	

Administrative Users can view the entire feedback entry.

- Click on the magnifier icon.

User Feedback									
Submitted By		All							
Submitted On		Thru		Containing					
Did you have any problem?		All		Status		Open		Search Clear	
Add New 1 of 22 213 Items 10 /Page Go									
Record ID	Submitted By Submitted On	Did you have any problem?	If yes, provide details	What would you change?	What would you like to see added?	What would you like to see removed?	What other information would you...	Status Updated By/On	Attachment
<input type="checkbox"/> 642	ToBonk 11/23/2016	No	This is a test feedb...					Open <input type="checkbox"/> ToBonk / 11/23/2016	
<input type="checkbox"/> 641	JGates 8/19/2016	Yes	den	den2	den3	den4	den5	Open <input type="checkbox"/> JGates / 8/19/2016	
<input type="checkbox"/> 640	TBonk 8/19/2016	No	aaaaaaaaaaaaa	bbbbbbbbbbbbbbb	ccccccccccccccc		ddddddddddddddddd	Open <input type="checkbox"/> TBonk / 8/19/2016	

WebEHRS displays the View Feedback screen.

- Click on the OK button to return to the User Feedback Show Table screen.

View Feedback OK

Submitted By: VGray Created On: 12/27/2011

*** Did you have any problems using WebEHRS?** Yes

If yes, please provide details.

Feedback should be used to submit request for changes to WebEHRS. If you are encountering issues with using the system as is or issues with data submitted or error messages, please contact customer support.

What would you change? (please be specific)

Note specific changes that are requested. Please be as specific as possible.

What would you like to see added that is not currently included and why?

Note any additional features that would be useful in this comment box.

What would you like to see removed and why?

Note any features that you would like to see removed and why. Please be as specific as possible

What other information would you like to share with us?

Share information about features of the system.

OK

3.7 MESSAGE BROADCAST

System Administrators send broadcast messages to all WebEHRS users by User Level. To access Message Broadcast:

- Click on the Message Broadcast link on the My Account screen.

[Message Broadcast](#)

View/edit/create messages to be broadcast in WebEHRS

WebEHRS displays the Send Broadcast Email screen and allows the user to setup and send the message. To send a broadcast message:

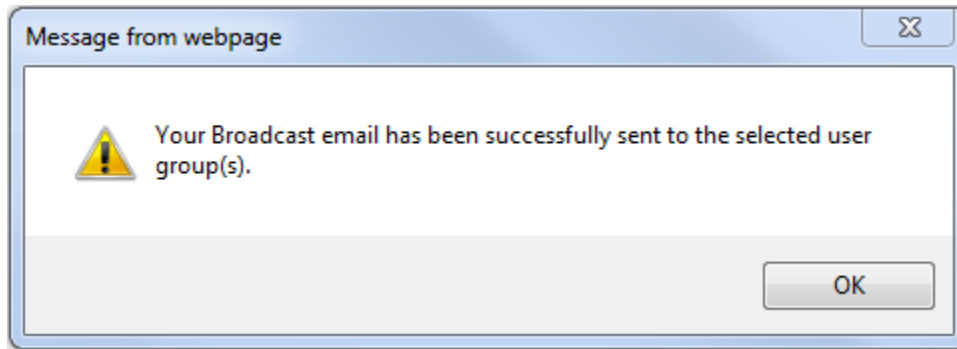
- Select recipients from the picklist.

Notes: Message Broadcast is designed to send messages by User Level. To select more than one User Level group as recipients, use the “Ctrl” or “Shift” key in conjunction with the mouse.

- Enter text in the text box for a Subject line.
- Enter text in the text box for a message body.
- Click on the Send button to send the message.
- Or click on the Cancel button terminate the message without sending.

The screenshot shows the 'Send Broadcast Email' interface. At the top, there is a green header bar with the title 'Send Broadcast Email' and a 'Cancel' button. Below the header, a red asterisk indicates a required field. The 'Send To' section features a dropdown menu with the following options: 'Please Select', 'All', 'Area EH Program Deputy', 'Area EH Program Director', 'Area EH Staff', 'CDP Admin', 'COSTEP', and 'District EH Program Deputy'. The 'Subject' section has a text input field. Below the subject field is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, insert image, delete image, link icon, unlink icon, cut, copy, paste, and text color. The font is set to Arial and the size is 1. The 'Text' section is a large text area for the message body. At the bottom, there are 'Send' and 'Cancel' buttons.

WebEHRS displays a pop-up message indicating that the message was sent successfully.



- Click the OK button to close the pop-up message.