



# USER ADMINISTRATION

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## ***WebGrants User Guide***

**Updated: April 15, 2004**

# USER ADMINISTRATION MAIN PAGE

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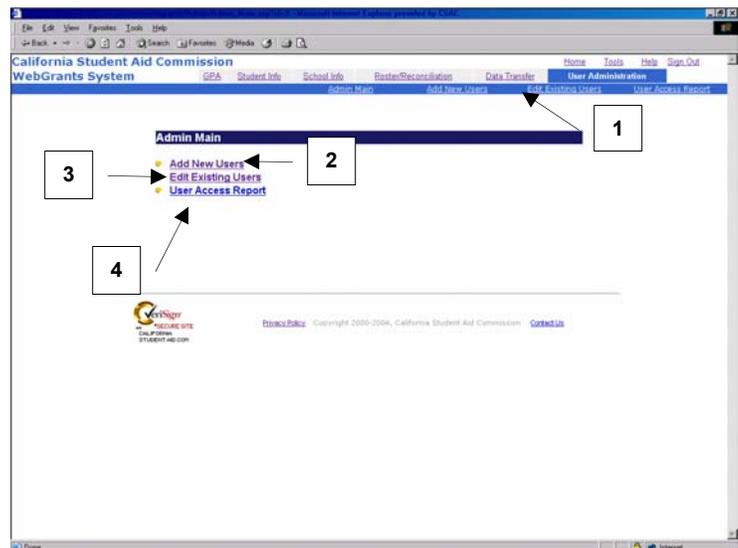
## Purpose

The responsibility for creating and maintaining WebGrants user accounts is in the hands of the WebGrants System Administrator (Administrator) at the school. Each school must identify an individual that will be the Administrator by completing the WebGrants System Administrator Agreement Form and submitting it to the CSAC Help Desk. If you do not have an Administrator for your school, or you do not know who your Administrator is, you can view the name of your WebGrants system administrator on the User Account Summary page (see *WebGrants User Guide*; Getting Started, page 5).

To create a user account, the Administrator must build a record of information about the individual who will be logging into WebGrants under a unique user ID. This record is called a **user profile** and it includes contact information and access permissions. The User Administration area of WebGrants allows Administrators to create user profiles for their school(s) and to modify the profiles of existing users.

## Page Elements

- 1. User Administration Navigation Bar**  
This shortcut navigation bar contains links to all pages within the User Administration area of WebGrants.
- 2. Add New User** Link to the Add New Users Page where Administrators can create new user profiles and add new users to the list of authorized users for a school (see page 3).
- 3. Edit Existing User** Link to the Retrieve Users Page where Administrators can select an existing user profile to view or modify (see page 7).
- 4. User Access Report** Link to a printable report that lists either active or inactive user IDs for a specific school. (see page 2).



## Access

The User Administration Main Page can be accessed by clicking the [User Administration](#) link in the Options box on the Home Page, or by clicking the [User Administration](#) link in the WebGrants Navigation Bar located in the upper right of all WebGrants pages.

# USER ADMINISTRATION MAIN PAGE

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## Page Functions

- Navigate to all other areas within the WebGrants system
- Navigate to all other pages within the User Administration area of WebGrants
- Sign out of WebGrants
- Print a User Access Report

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### ***Navigate to all other pages within the User Administration area of WebGrants***

The main page of each WebGrants area contains links to the pages included in that area. In addition, each area within WebGrants has its own submenu navigation bar that is located in the blue bar directly under the WebGrants Navigation Bar. This submenu navigation bar allows the user to move from page to page within the same area of WebGrants without continually going through the Main Page of each area.

Click the [Add New User](#) link to view the Add New User Page (see page 3).

#### **OR**

Click the [Edit Existing Users](#) link to view the Retrieve Existing Users Page (see page 5).

#### **OR**

Click a link on the User Administration navigation bar to view the indicated page.

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### ***Print a User Access Report***

1. Click the [User Access Report](#) link
2. Type a valid school ID number into the **USED ID** field (see figure 2-1).
3. Select either “Active Users” or “Inactive Users” from the **Report Type** drop down list.

NOTE: “Active Users” are all current WebGrants users with access to the school listed in the USED ID field whose Effective End Date is after the current date. “Inactive Users” are users whose Effective End Date has expired. (see page 3: Effective End Date).

4. Click the <Go!> button  
➔ The filtered report will appear.
5. Click the <Print> icon on the browser toolbar to send the document to the default printer.

User Administration / WebGrants User Access Report

- Enter school code
- Select report type
- Click on GO!

USED Code =  Report Type = Active Users

Figure 2-1: USED Code field

# Add New User Page

## Purpose

The Add User Page allows the Administrator to build a new user profile. The fields on this Web Page that are marked with an asterisk (\*) are required (see figure 3-1).

## Page Elements

- User ID** The user ID is a unique identifier within the entire system. No two users can have the same user ID. If a user ID is already in use, a message will appear at the top of page after attempting to add the profile that explains to the Administrator that the ID is currently in use and to type in a different user ID. (required field)
- Password** When creating a new user profile, the Administrator creates a default password. The password must be six alpha and/or numeric characters with no spaces. When the new user logs in to WebGrants for the first time, he/she will be required to change the password.
- Secret Question & Answer** The purpose of the secret question is to allow the Administrator a method for confirming the identity of a user. For example, when a user forgets his/her password and requests that it be reset, the Administrator can ask the user the secret question and compare the answer to what is listed in the secret answer field. If the user answers correctly the identity of the user is verified. The drop down box gives four question options of SSN (Social Security Number); Pet's Name; Mother's Maiden Name; and Other.
- Contact Information** The current demographic information of the user.
- User Role** The level of administration allowed the user. Administrators at the school can only create "Regular User" accounts.
- Effective Start Date** The date the user's access to WebGrants is to become active. The date can be no earlier than the current date and must be in mm/dd/yyyy format as in 04/20/2002 (required field).
- Effective End Date** The date the user's access to WebGrants is to become inactive. Once created a user's profile cannot be deleted by the Administrator. The Effective End Date should be used to terminate a user's access to the WebGrants system. The date can be no earlier than the current date and must be in mm/dd/yyyy format, as in 04/20/2002 (required field).

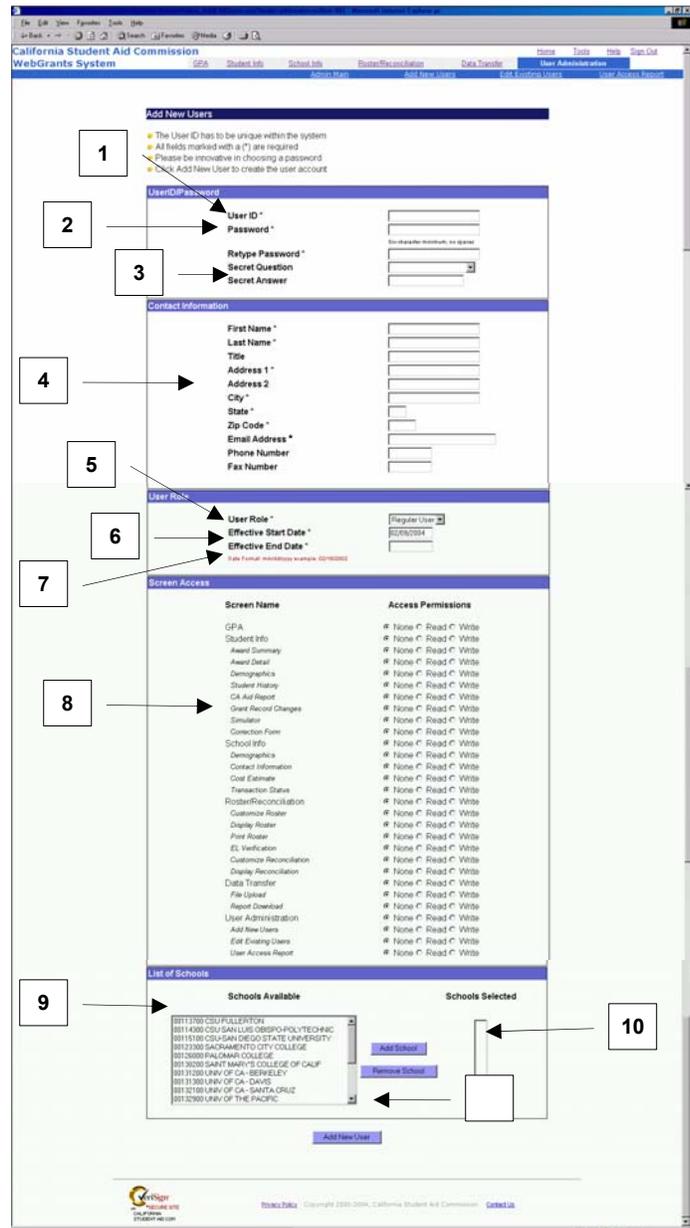


Figure 3-1: Required Field asterisk

# Add New User Page

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## Field Descriptions (cont.)

8. **Screen Access** For each of the WebGrants areas listed, indicates one of the following levels of access allowed the current user:
  - *None* The user does not have the navigation options available to access this area of WebGrants.
  - *Read* The user can navigate to the pages in this area and view information but cannot perform any functions.
  - *Write* The user can navigate to the pages in this area, view information and perform all functions available on those pages.
9. **Colleges Available** The schools for which the Administrator has the authority to create users are listed here. To add a school to this list, Administrators must contact the CSAC help desk.
10. **Colleges Selected** Administrators can set up a user's profile to allow access to one or more of the schools listed in the Colleges Available field. To add one of the Colleges Available to a user's profile, click the <Add College> button to move it from the Available field to the Selected field. To remove one of the colleges selected for a user's profile, click the <Remove College> button to move it from the Selected field to the Available field. The user will only have access to those schools listed in the Colleges Selected field.
11. **<Add New User> Button** Click to add the user profile to the list of authorized users.

## Access

This page is accessible through the User Administration Main Page (see page 1), or by clicking on the [Add New User](#) link on the User Administration navigation bar.

## Page Functions

- Navigate to all other areas within the WebGrants system
- Navigate to all other pages within the User Administration area of WebGrants (see page 2 for instructions).
- Sign out of WebGrants
- Add a new user

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### Add a new user

1. Complete all fields on the page according to specifications outlined in the Screen Descriptions (fields marked with an asterisk (\*) are required.)
2. Click the <Add New User> button.
  - ➔ If all the entered fields are valid, the message "User successfully added" will appear at the top of the page (see figure 4-1).
  - ➔ If there are any errors preventing the user profile from being created, those error messages will appear at the top of page. Follow the instructions to fix the errors, then click the <Add New User> button again.



Thank You. User Account successfully created for Jsmith.

Figure 4-1

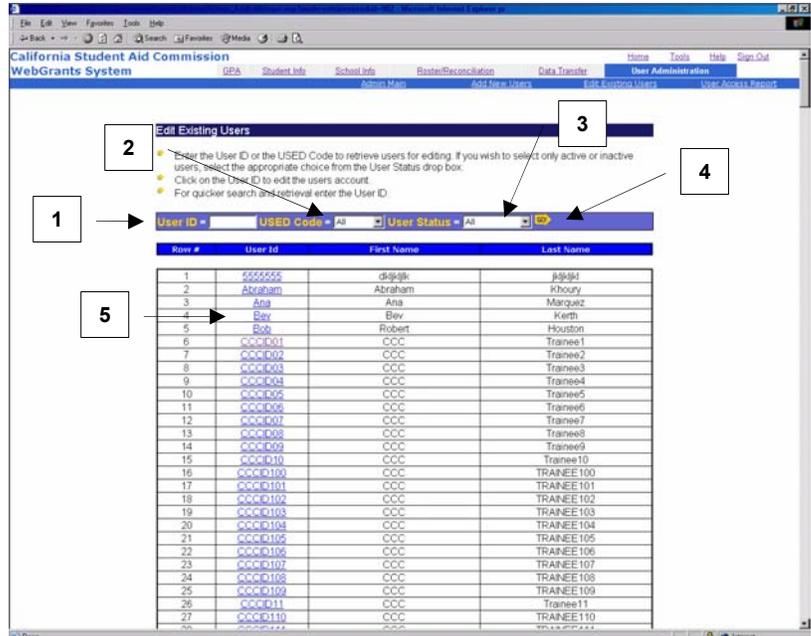
# Edit Existing Users Page

## Purpose

The Edit Existing Users Page allows the Administrator to find and select a user's profile for viewing or modification.

## Page Elements

- User ID Search** Enter a valid user ID here to search for a specific user's profile.
- USDE Code Search** Enter a valid school code here to list all user profiles that exist for a specific school.
- User Status** Select either "Active Users" or "Inactive Users" from the Report Type drop down list. "Active Users" are all current WebGrants users with access to the school listed in the USED ID field whose Effective End Date is after the current date. "Inactive Users" are users whose Effective End Date has expired. (see page 3: Effective End Date).
- <GO!> button** Click here to list the user profiles available for editing based on the criteria entered in the User ID field, USDE code field and/or User Status field.
- User Display** The displayed list of user profiles available for editing based on the criteria entered in the User ID field, USDE code field and/or User Status field. Values will only be displayed after search criteria is entered and the <GO!> button has been clicked.



## Access

This page is accessible through the User Administration Main Page (see page 1) or by clicking on the [Edit Existing User](#) link on the blue submenu navigation bar.

# Edit Existing Users Page

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## Page Functions

- Navigate to all other areas within the WebGrants system
  - Navigate to all other pages within the User Administration area of WebGrants
  - Sign out of WebGrants
  - Search for and view a specific user profile
  - Search for and view all user profiles available for a specific school
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### ***Search for a specific user profile***

1. Type the User ID of the profile you want to retrieve in the **User ID Search** field
    - If typing in an exact User ID is view, make sure that the **USED Code** field and **User Status** fields list “ALL”.
  2. Click the <GO!> button
    - If the User ID is valid, the User ID record will appear in the **User Display**
  3. Click on the displayed User ID to access the user’s profile on the Update User Page (see page 7).
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### ***Search for all user profiles available for a specific school***

1. Type the USDE school ID number in the USDE Code Search field
2. Select either “Active Users” or “Inactive Users” from the **User Status** drop down list.
3. Click the <GO!> button
  - If the school is valid, the list of User IDs with access to the selected school’s grant records will appear in the User Display
4. Click on one of the displayed User IDs to access that user’s profile on the Edit Existing User Page (see page 7)

**NOTE:** Administrators will only be able to view and modify user profiles that are linked to the schools for which the Administrator has control.

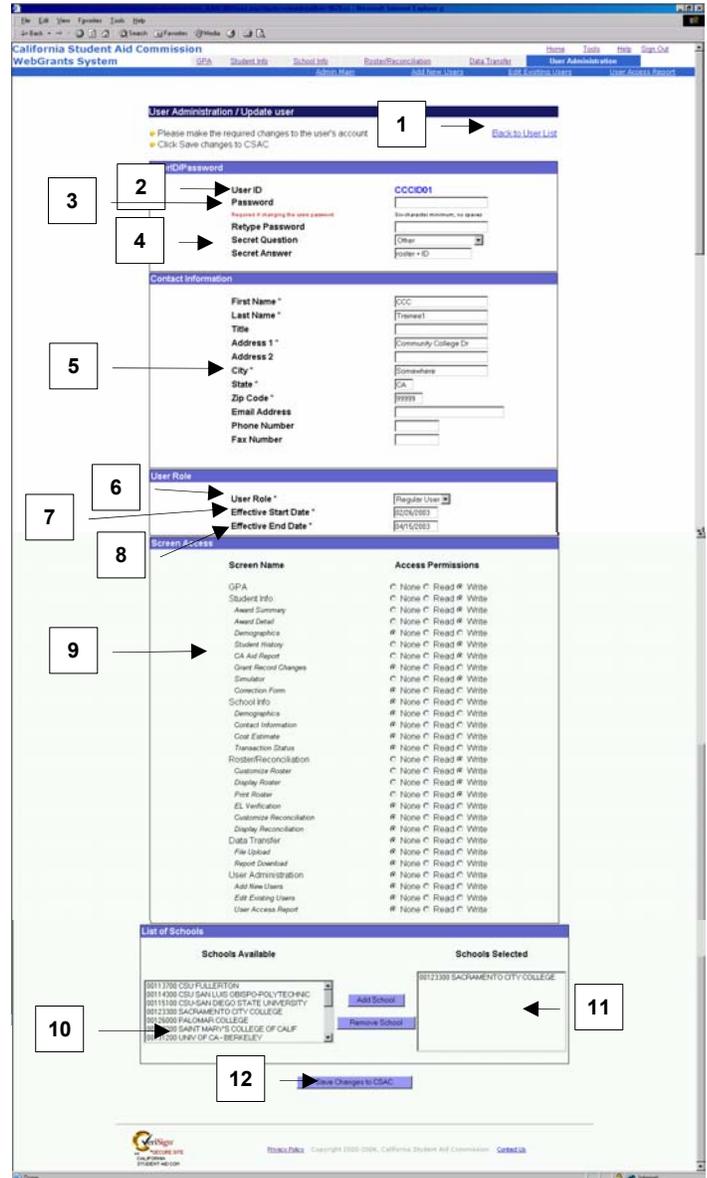
# Update User Page

## Purpose

The Edit Existing User Page allows the Administrator to edit the profiles of already created users IDs. The fields on this Page that are marked with an asterisk (\*) are required (see figure 3-1).

## Page Elements

- 1. Back to User List** Link that returns the user to the User Administration / Retrieve users Page (see page 5).
- 2. User ID** The user ID is a unique identifier within the entire system. No two users can have the same user ID.
- 3. Password** The password must be six alpha and/or numeric characters with no spaces. Administrators may reset a user's password by changing it here (required field).
- 4. Secret Question & Answer** (see page 3)
- 5. Contact Information** The current demographic information of the user.
- 6. User Role** The level of administration allowed the user. Administrators at the school can only create "Regular User" accounts.
- 7. Effective Start Date** The date the user's access to WebGrants is to become active. The date can be no earlier than the current date and must be in mm/dd/yyyy format as in 04/20/2002 (required field)
- 8. Effective End Date** The date the user's access to WebGrants is to become inactive. Once created, a user's profile cannot be deleted by the Administrator. The Effective End Date should be used to terminate a user's access to the WebGrants system. The date can be no earlier than the current date and must be in mm/dd/yyyy format, as in 04/20/2002 (required field).
- 9. Screen Access List** For each of the WebGrants areas listed, indicates one of the following levels of access allowed the current user:
  - None* The user does not have the navigation options available to access this area of WebGrants.
  - Read* The user can navigate to the pages in this area and view information but cannot perform any functions.
  - Write* The user can navigate to the pages in this area, view information and perform all functions available on those pages.



## Page Elements (cont.)

10. **Colleges Available** The schools for which the Administrator has the authority to create users are listed here. To add a school to this list, Administrators must contact the CSAC help desk.
11. **Colleges Selected** Administrators can modify a user's profile to allow access to one or more of the schools listed in the Colleges Available field. To add one of the Colleges Available to a user's profile, click the <Add College> button to move it from the Available field to the Selected field. To remove one of the colleges selected for a user's profile, click the <Remove College> button to move it from the Selected field to the Available field. The user will only have access to those schools listed in the Colleges Selected field.
12. **<Save Changes to CSAC> Button** Click to save any changes made to the user profile.

## Access

This page is accessible by clicking on a displayed user name on the Edit Existing Users Page (see page 5).

## Page Functions

- Navigate to all other areas within the WebGrants system
- Navigate to all other pages within the User Administration area of WebGrants.
- Sign out of WebGrants
- Edit an existing user profile

### *Edit an existing user profile*

1. Complete changes to the user profile fields according to specifications outlined in the Screen Descriptions (fields marked with an asterisk (\*) are required).
2. Click the <Save Changes to CSAC> button.
  - If all the entered fields are valid, the message "User successfully modified" will appear at the top of the page.
  - If there are any errors preventing the user profile from being modified, those error messages will appear at the top of page. Follow the instructions to fix the errors, then click the <Save Changes to CSAC> button again.