Section 2 – Users and Permissions Management

Users and Permissions Management

Creating New Users

A "user" in WebNEERS is someone who has access to log into the system and perform various functions such as adding, editing, or deleting data/information. When a user account is created the new person is able to access the system. This is completely separate from adding him/her as a staff person. See Section 4 for information about managing staff.

1. Select **Add User** from the *WebNEERS Home page*
2. Enter the new user's **Email** address.

Tip: An email address can be used once within the EFNEP version of WebNEERS and once within the SNAP-Ed version, but it cannot be used multiple times within the same version of WebNEERS. If an email address has already been used, check the "View Users" section to see if he/she already has an account.

3. Enter a **Verification Code**

Note: *The verification code can be anything that you choose, but it will need to be provided to the user in a separate email or alternative means of communication, as the email generated by **WebNEERS** will not provide the verification code. This is done to ensure the security of the system.*

4. Enter the user's **First Name**
5. Enter the user's **Last Name**
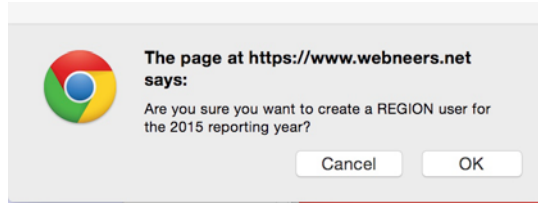6. Select the **User Type**, Institute or Region

Institute User

   a. Institute Users can skip to permissions step.

Region User

   b. Region Level Users need to be assigned to their appropriate regions(s).

7. Select or de-select the *permissions to be granted* to the new user.
8. Select **Save** at the bottom of the page.
9. Click OK to confirm the creation of this new user.

The page at https://www.webneers.net says:

Are you sure you want to create a REGION user for the 2015 reporting year?

Cancel   OK

Note:

It is important that the region to which the user will be assigned is created prior to any users being added. The user can be edited to include the regions after the region has been added, however, adding the region first, saves time and effort.

User Permissions

Institute Level

Institute level user permissions include the ability to add, edit or delete annual updates/5-year plans, budget sheets, budget justifications, subgroups, filters and public assistance, as examples. Institute level users also have the ability to give Region level users "Read Only" access to data. These permissions are listed separately and, if selected, will allow Region level users to view data but not add, edit, or delete data.

Region Level

Region level user permissions include the ability to add, edit, and delete adult participants, youth groups, staff, subgroups, filters and public assistance, as examples. Review the list of permissions available and strategically select the permissions to be granted or withheld from any given user.

Changing Permissions

Occasionally it is important to adjust the permissions that are granted to a given user. When permissions need to be added or removed from a user, the Institute level or Region level user (typically the person who created the user), who has been granted access to allow changes to permissions, can, in real time, change another user's access levels.

*For example, if the ability of a user to manage adults is removed, the tabs on the home screen will turn grey and will no longer be clickable. The internal workings of **WebNEERS** will also block the user from manually typing web addresses that would allow access to this portion of the system.*


Note:

Changing and assigning user permissions is an advanced feature. New users should proceed with caution when changing user permissions. It is recommended that the default user permissions be used for new institute level and new region level users.
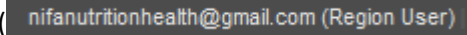
1. Select **View Users** from the ***WebNEERS Home page.***

2. Select the ***Edit icon*** ( ) next to the user whose permissions are to be edited.
3. Select **Rights** tab.
4. Select ( ) or de-select ( ) the permissions of the user.
5. Select **Save** at the bottom or top of the page.

Changing Region Access

Region users are able to view, change, and grant access to only the regions they are assigned. Users may need to have the Region to which they have access changed or they may have added responsibilities in a second (or more) Region.

1. Select **View Users** from the ***WebNEERS Home page.***

2. Select the ***Edit icon*** ( ) next to the user whose access is to be edited.
3. Select **Region** tab.
4. Select ( ) or de-select ( ) the Region(s) to which the user will have access.
5. Select **Save** at the bottom or top of the page.
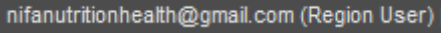
User Information and Settings

To manage user settings, the user can select their email address in the dark gray bar at the top of the screen (nifanutritionhealth@gmail.com (Region User)). This will direct the user to the "User Information and Settings Page." On this page, the user can manage their **User Information**, **Change Password**, modify their **Food Search** Algorithm, modify **Dual User Access** (when applicable), and view their **User Permissions**.

Password Management

All users must register with a unique password, which will be encrypted and known to only the registered user.

Changing Current Password

WebNEERS offers the user the option of managing his/her own password.

1. Select the login information (nifanutritionhealth@gmail.com (Region User)) in the dark gray bar.
2. In the second box of information, enter the user's **current password**.
3. Enter the **new password** and re-enter the password.
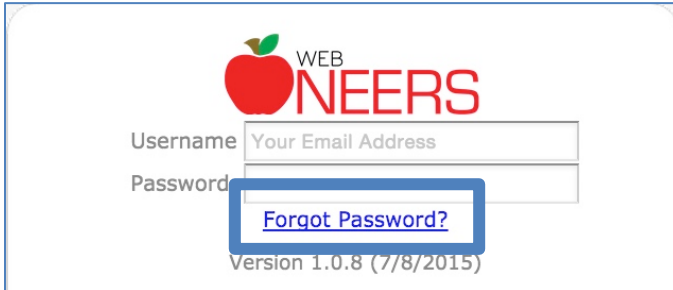4. Select the **Update Password** button to save the change.

Change Password
Current Password:
New Password:
Confirm Password:
Update Password

Forgot Password?

If the password is forgotten, at the Login screen, the registered user can reset it.

1. Select **Forgot Password?**

2. Enter the username (email address).
3. Click **Get Password.**

A temporary password will be forwarded to the registered email address. The email will come from **EFNEP Admin** or **SNAP-Ed Admin** depending on the system the password was request from. It may take several minutes for the password notification to come through.

 *Please do not click **Get Password** more than once. Check junk mail or spam if the email from EFNEP/SNAP-Ed Admin is not received.*

After users log in with a temporary password, they should change their password back to something they can remember. This process can also be used to periodically update or manually change a password.
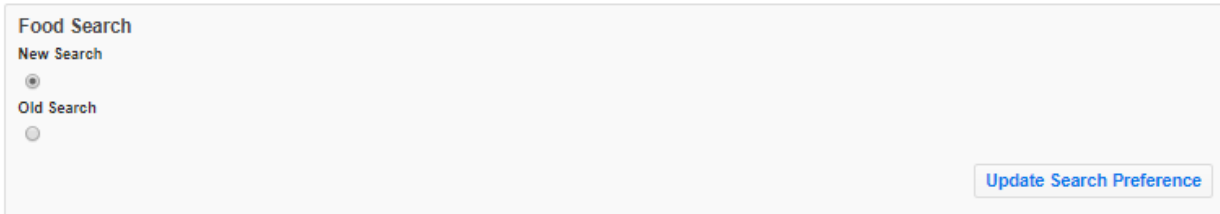
 A user being able to change his/her own password is a default permission. If you create custom permissions, the user will need to be granted the permission to "change password."

Food Search Preferences

Changing User Food Search Preferences

1. Access the **User Information** page by selecting the username displayed in the top right corner of the screen (nifanutritionhealth@gmail.com (Region User)) in the dark gray bar.
2. While in the **User Information** page, the user can choose **New Search** or **Old Search** to indicate which algorithm they would like to use when adding or managing participant food recalls.
3. Select the **Update Search Preference** button to save the change.

(For more information on these food search algorithms, see section 5 of the WebNEERS Manual.)

Food Search
New Search
○
Old Search
○
Update Search Preference

Dual User Access

The **Dual User Access** feature is a permission granted by the individual who manages user accounts at each institution, typically the institute EFNEP coordinator. This feature provides dual users (users with *both* Institute and Regional level accounts) the ability to switch easily between those accounts within their **Institute** level login.

To grant Dual User Access:

1. Login to Institute level WebNEERS account.
2. Access the **User Rights** page by selecting the "**View Users**" displayed in the top right corner of the screen.

Users
✎ View Users
✎ Add User
✎ View Pending Users

3. Within the **View Users** section, select the **Edit icon** (🔧) next to the user whose institute level permissions are to be edited.

4. In the "**Rights**" tab, select Region to add regional level access to the user's institute level permissions. Once selected, a "**Regions**" tab will appear to the right of the "**Rights**" tab. Review user's permissions before moving to the "**Regions**" tab.

 Please remember to review all permissions, to ensure that the users have appropriate access to information in WebNEERS before moving to the "**Regions**" tab.
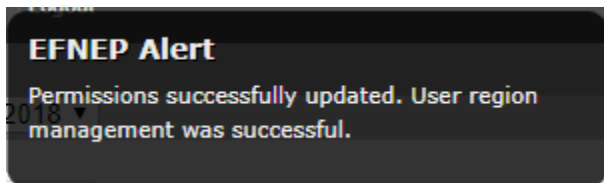
5. Click on the "**Regions**" tab, if there is more than one region at the institute available to the user, select which region(s) to grant the user access to.

6. Save changes, and check that the WebNEERS "EFNEP Alert" appears in the top right corner.

EFNEP Alert

Permissions successfully updated. User region management was successful.

Note: Once **Dual User Access** is enabled, the user can switch between their Institute and Regional accounts by selecting the "Switch to Region Access" or "Switch to Institute Access" link at the top right of the WebNEERS home page.

Removing Users

As staff transition out of their role with EFNEP, **WebNEERS** user access needs to be removed to ensure the confidential information of program participants and other staff are protected. Removing staff can be completed at the Institute or Region levels.

1. Select **View Users** from the **WebNEERS Home page.**
2. Select the **Delete icon** ( ) next to the user to be deactivated.
3. Select **Ok**, when prompted "*Are you sure you want to inactivate this user?*"

Note: The user will remain in the system, but will no longer be able to access the system. He/she also will not be listed on the main **View Users** page. To view inactive users, click the View Inactive User button on the top left.

Reactivating Users

A user who was accidentally removed from **WebNEERS** or whose access needs to be reestablished can be reactivated at the Institute or Region levels.

The Process

1. Select **View Users** from the **WebNEERS Home page.**
2. Click the ![View Inactive Users] button on the top left.
3. Select the **Plus icon** (![+]) next to the user to be reactivated.
4. Select **Ok**, when prompted "*Are you sure you want to reactivate this user?*"

Note: *The user will disappear from the list of inactive users and move to the list of active users. To view the active users, click the "**View Active Users**" button on the top left.*

Masquerade Feature

The **Masquerade Feature** allows a user to assume the role of another user listed in **View Users** button of the **Users** section. This can be helpful for quickly determining what other users can see when logged into their accounts, or to remotely assist other users. This feature is available to any users that have permission to manage all users for institute (Permission 155).

To use this feature:
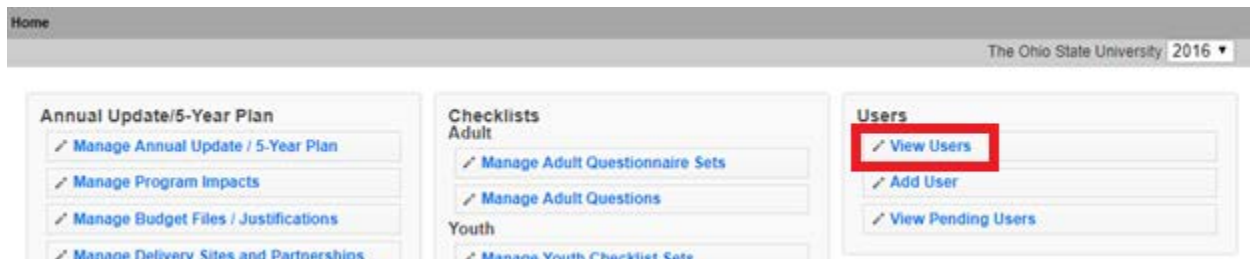
1. Select **View Users**.

2. On the View Users screen select the **Star icon** (![star]) next to the user to be assumed.
3. After assuming the role of the selected user, the user can now do anything that the assumed user has permission to do.
4. The user will see an **EFNEP Alert** box in the top right indicating that the masquerade feature is active.
5. To exit the masquerade feature, select the original user name, highlighted in blue in the **EFNEP Alert** box.
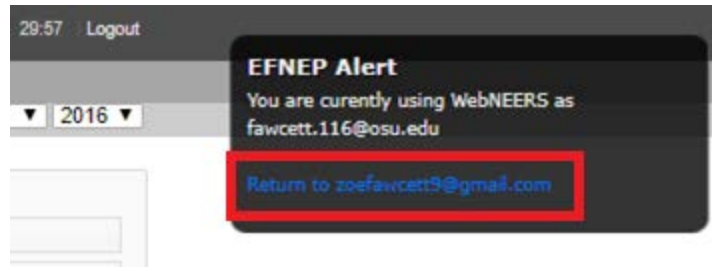
Note: *The steps for masquerading are the same for both <u>Institute</u> and <u>Regional</u> users. The only difference is the location of the "View Users" link on the page. For <u>Institute</u> level users, "View Users" is located in the **Users** section on the top, far right (third column) of the WebNEERS screen. For <u>Region</u> level users, the "View Users" section is located on the bottom left (first column) of the screen.*

# Changing Regions

Region Level

Users who have been granted permission to access more than one <u>Region</u>, can switch between the approved regions on their **Home page**.

Note: *It is important that users with multiple Region assignments carefully monitor the Region he/she has logged into to ensure the data is not entered into the wrong system. Once the data is entered, it cannot be transferred from one Region to another; reentry of the data will be required.*

1. Select the **Down arrow icon** located to the right of the light gray bar at the top of the **Home page.**
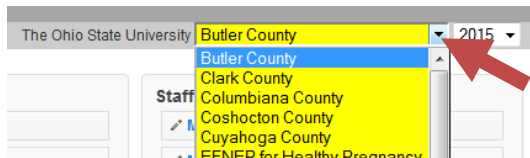
2. Select the region to access.
3. Select **Ok**, when prompted "*Are you sure you want to switch to region '……'.*"

Note: *After the user completes this process he/she will be in the Region selected. This can be verified in the light gray bar at the top of the **Home page**. There is no discernible difference between the Region pages which makes it critical that users with access to multiple regions verify that they are in the correct region before conducting any work in **WebNEERS**.*

Changing Years

All users have the option to view the data from the current year as well as data from previous reporting years. This can be valuable if users need to print reports from previous years or access old records.

Note: *EFNEP users will only be able to view previous year data as it is locked upon federal submission and cannot be edited; SNAP-Ed users will be able to view and edit so extra care should be taken when switching between years.*

1. Select the ***Down arrow icon*** located to the far right of the light gray bar located at the top of the ***Home page.***
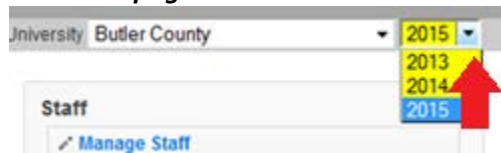
2. Select a **Year** to access.
3. Select **Ok**, when prompted "*Are you sure you want to switch to context of year '……'.*"

Note: *After the user completes this process he/she will be in the year selected. This can be verified in the light gray bar located at the top of the **Home page**. There is no discernible difference between the home pages. Differences will appear in the data and the reports. For example, in the EFNEP system, previous year data cannot be added, edited, or deleted.*

Registration Process for New Users

New users to ***WebNEERS*** will receive an email generated from the system requesting the user to register. The email will look like the information contained below. If the new user does not receive the email in his/her inbox, this person should review their "*junk*" or "*trash*" folder, as some email systems identify the email from ***WebNEERS*** as spam or other high-risk email.
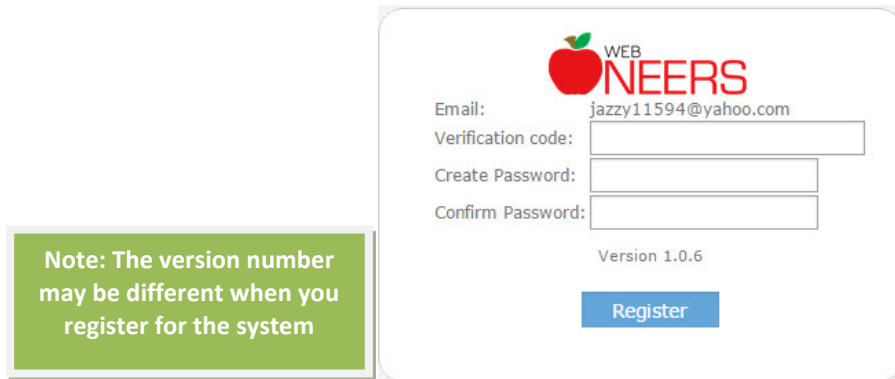
Note: *As a reminder, the verification code **will not** be included in the email and needs to be provided to the new user by the individual who is creating their account.*

1. Select the link in the **Join WebNEERS** email.
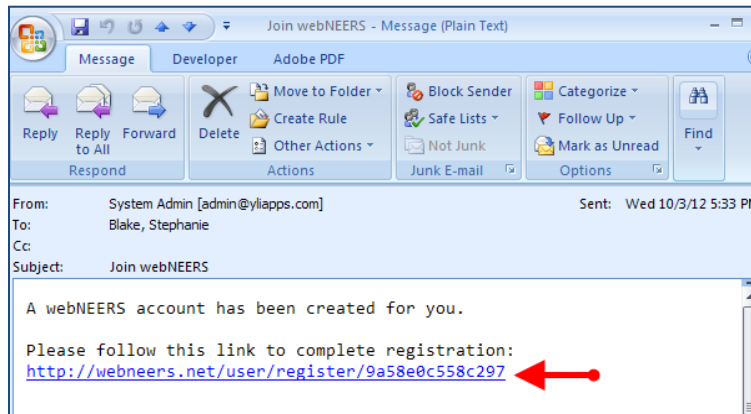
This will forward the new user to a screen that looks like the image below:

Note: The version number may be different when you register for the system

Note:
The screen will contain the user's email, not the email presented above.
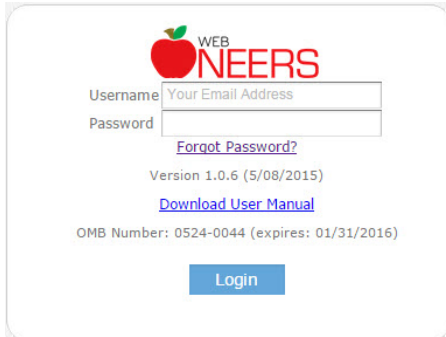
2. Enter the **Verification code** received in a separate email or by some other means of communication, when the user was added to the system. If the new user does not have a verification code, they should contact the person who setup their account.
3. *Create* a **Password**.
4. Reenter the password to *Confirm.*
5. Click **Register** to complete the registration process.

Note:
Each user will log in with their own username and password. The passwords are encrypted and not available to anyone, at any level, including the system administrator(s). Login information is not to be shared between users.

Log In Once Registered

The log in screen, once the user has successfully registered, will look similar to the image below. At that point the user simply needs to enter his/her user name (email address) and password and click "Login" to access WebNEERS. If the password is forgotten, the user can use the steps above to reset it.

 Version numbers change each time the software is updated.

 Selecting the link in the registration email, after successfully registering will result in the screen below.
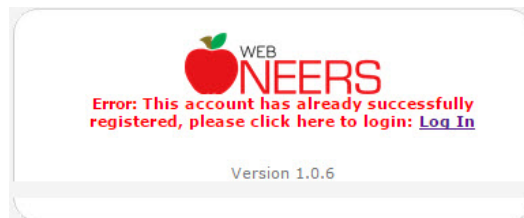
Recommendations for Accessing WebNEERS

Creating Bookmark(s)

Once the user has registered in the system, the website should be bookmarked. Creating a bookmark should be done according to the process defined by the web browser being used. Creating a bookmark will enable users to easily access *WebNEERS* for future use.

The https address for **EFNEP** is:
https://www.webneers.net

The https address for **SNAP-Ed** is:
https://snap.webneers.net