Dashboard User Management
(Only Agency Owners have this capability)

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Dashboard User Management
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Setting up New Users

1. Log into Dashboard using state e-mail address and password. Click Login.

2. Click drop-down arrow beside circle with initial in it (in top-right corner of the page)

3. Choose User Management from Drop-Down List. It is the second option of the list.
4. Click Invite Users Button.

5. Enter Information for new user: First name, Last Name, e-mail address, choose Agency from Drop-Down List. Choose Role From Drop-Down List. Data Manager-can enter adjustments, subcontractor spend, self-Reporting transactions (self-reporting agencies & authorities only).

The following reports are also available to view:

- SWaM Plan Administrator-Has access to complete SWaM Plan
- Report Viewer-Person in upper management who only needs to view reports. This person does not have ability to enter/change data in the dashboard.
- Agency Owner-Has same access as Agency Data Manager, but can also assign/change/remove user’s access
- SWaM Plan Approver-Must be agency Head. This person is able to sign off on the Agency SWaM Plan.

There are a few additional roles available that are combinations of the above roles.

6. Click the invite button.
7. The New user will receive a system generated e-mail from noreply@sbsd.virginia.gov. They will need to click the link in the e-mail to activate their account and create a password. The e-mail may sometimes go to a user’s junk/spam or trash folder, so the user may need to check those folders if they don’t see the e-mail in their inbox.

Changing a User’s Role

1. Log into the Dashboard and go to User Management by following steps under setting up new users.

2. Search for the Name of the user whose role you want to change by entering their name in the search box and clicking the magnifying glass.

3. Click the eyeball icon next to the user’s name under actions.
4. Click the Edit Profile button.

5. Under Role Drop-Down, choose new role and hit update button.

Deactivating a User who is no longer with the Agency

1. Log into the Dashboard and go to User Management by following steps 1-3 under setting up new users.
2. Search for the Name of the user who you want to deactivate by entering their name in the search box and clicking the magnifying glass.
3. Click the eyeball icon next to the user’s name under actions.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Email ID</th>
<th>Role</th>
<th>Created Date</th>
<th>Last Login Date</th>
<th>Login Count</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>SwAM Plan Approver</td>
<td>Sep 17, 2019</td>
<td>Sep 25, 2020</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

4. Click the deactivate button next to the user’s name

5. A message will pop up on the screen saying that the user’s account has been deactivated and they will get an e-mail saying that their account has been deactivated.

Password Reset Requests

*If a user has activated their account by clicking the link in the activation e-mail and created a password, but forgotten their password, they can request a password reset from the login screen or the Agency Owner can do it for them from the User Management page.*

User

1. Click Login on the homepage.
2. Click “Don’t remember your password?” Link

3. Enter your e-mail address in the box and click the send e-mail link.

4. You will get a system generated e-mail. Follow the prompts in the e-mail to reset your password.

Password Reset Requests

*If a user has activated their account by clicking the link in the activation e-mail and created a password, but forgotten their password, they can request a password reset from the login screen or the Agency Owner can do it for them from the User Management page.*

Agency Owner

1. Log into the Dashboard and go to User Management by following steps 1-3 under [setting up new users](#).
2. Search for the Name of the user who you want to send password reset e-mail to by entering their name in the search box and clicking the magnifying glass.

3. Click the eyeball icon next to the user’s name under actions.

4. Click the Reset Password button

5. The user will get a system generated e-mail. They will need to follow the prompts in the e-mail to reset their password.

Sending a New Activation E-Mail

If a User has not yet activated their account, the Agency Owner will see an envelope icon next to the users name when going to user management. Activation e-mails are only good for a short period of time. If a user does not activate their account within that time period, the agency owner will need to send another e-mail.

1. Log into the Dashboard and go to User Management by following steps 1-3 under setting up new users.
2. Search for the Name of the user who you want to send new activation e-mail to by entering their name in the search box and clicking the magnifying glass.

3. Click the envelope icon next to the user’s name.

4. The user will receive a new system generated e-mail from noreply@sbsd.virginia.gov. They will need to click the link in the e-mail to activate their account and create a password. The e-mail may sometimes go to a user’s junk/spam or trash folder, so the user may need to check those folders if they don’t see the e-mail in their inbox.