
Dashboard User Management

(Only Agency Owners have this capability)

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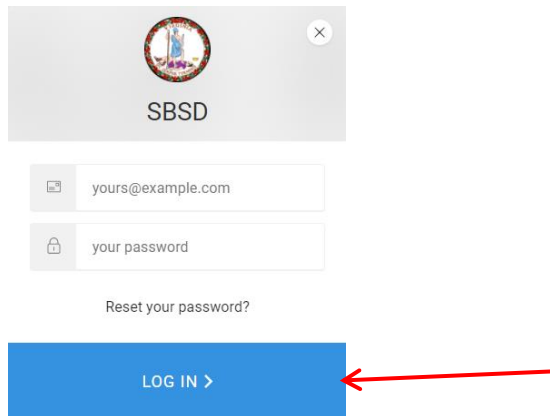
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Dashboard User Management

(Only Agency Owners have this capability)

Setting up New Users

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

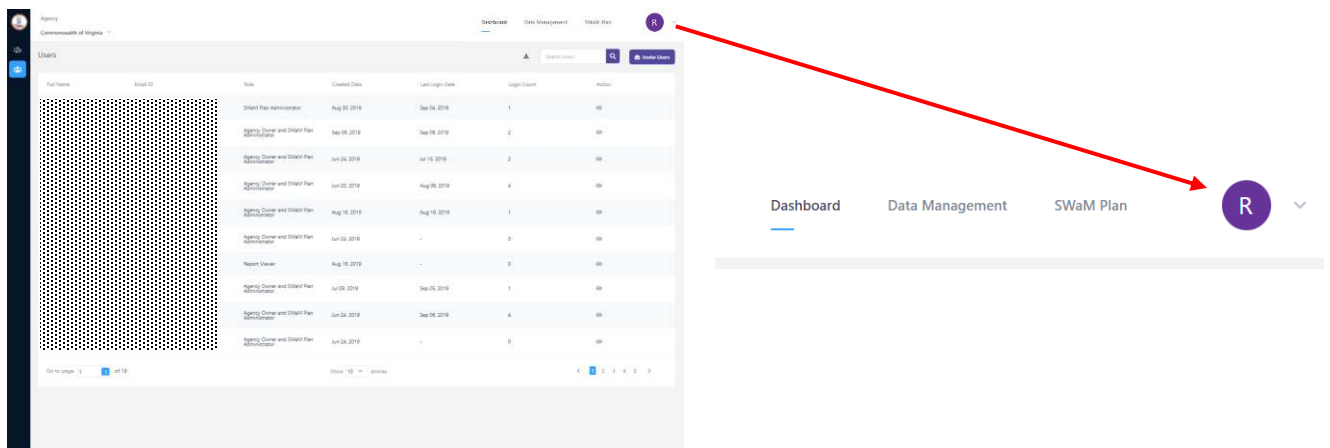


SBSD

Reset your password?

LOG IN >

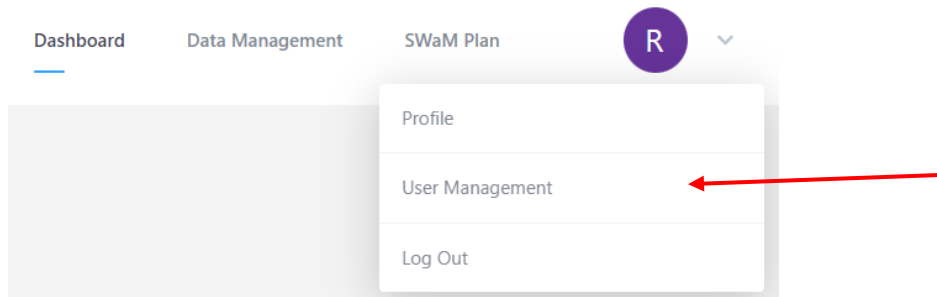
2. Click drop-down arrow beside circle with initial in it (in top-right corner of the page)



The screenshot shows the 'Users' management page with a table of users. In the top right corner, a navigation bar contains 'Dashboard', 'Data Management', and 'SWaM Plan'. A purple circle with the letter 'R' and a dropdown arrow is highlighted. A red arrow points from this circle to a zoomed-in view of the dropdown menu.

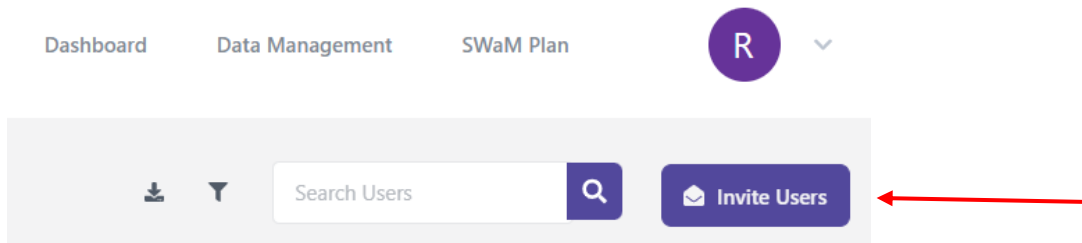
Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
SWaM Plan Administrator		SWaM Plan Administrator	Aug 05, 2019	Sep 04, 2019	1	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Sep 09, 2019	Sep 09, 2019	2	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jul 08, 2019	Jul 15, 2019	2	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jun 25, 2019	Aug 05, 2019	4	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Aug 19, 2019	Aug 19, 2019	1	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jul 08, 2019	-	0	✖
Report Viewer		Report Viewer	Aug 19, 2019	-	0	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jul 08, 2019	Sep 05, 2019	1	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jul 24, 2019	Sep 04, 2019	4	✖
Agency Owner and SWaM Plan Administrator		Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	✖

3. Choose User Management from Drop-Down List. It is the second option of the list.



The image shows a close-up of the dropdown menu that appears when the user profile icon is clicked. The menu items are: Profile, User Management, and Log Out. A red arrow points to the 'User Management' option.

4. Click Invite Users Button.



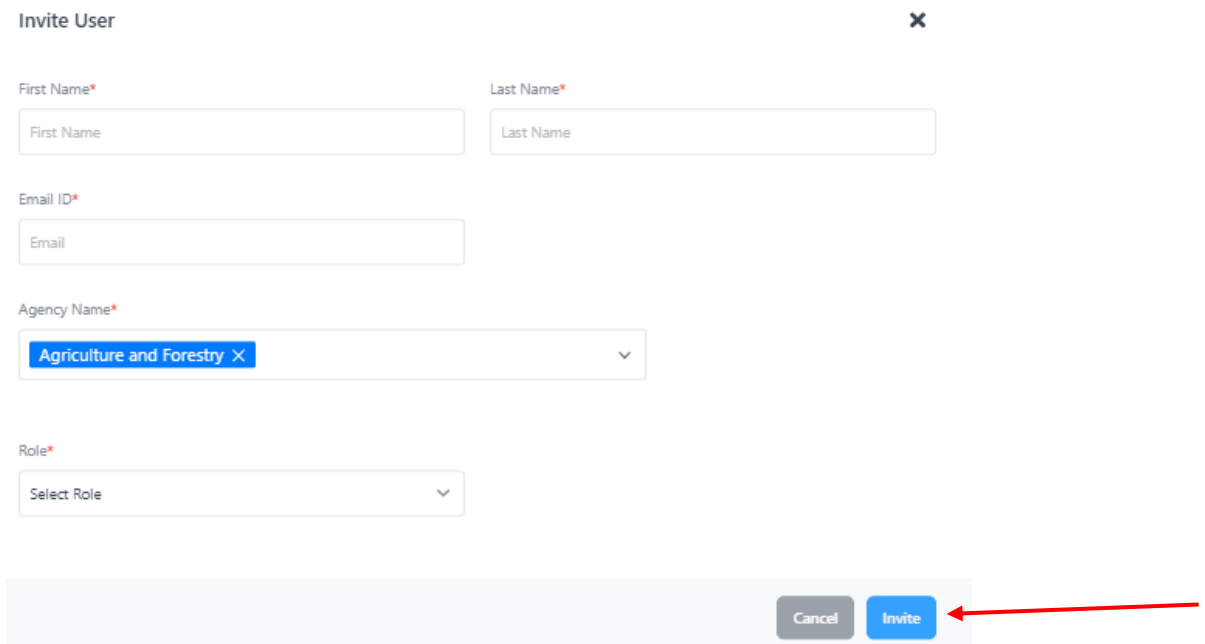
5. Enter Information for new user: First name, Last Name, e-mail address, choose Agency from Drop-Down List. Choose Role From Drop-Down List. Data Manager-can enter adjustments, subcontractor spend, self-Reporting transactions (self-reporting agencies & authorities only).

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.



The screenshot shows the 'Invite User' form. It has a title 'Invite User' and a close button 'X' in the top right corner. The form contains the following fields:

- First Name* (text input)
- Last Name* (text input)
- Email ID* (text input)
- Agency Name* (dropdown menu with 'Agriculture and Forestry' selected)
- Role* (dropdown menu with 'Select Role' selected)

At the bottom right of the form, there are two buttons: 'Cancel' and 'Invite'. A red arrow points to the 'Invite' button.

- 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

- Log into the Dashboard and go to User Management by following steps under [setting up new users](#).
- 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.



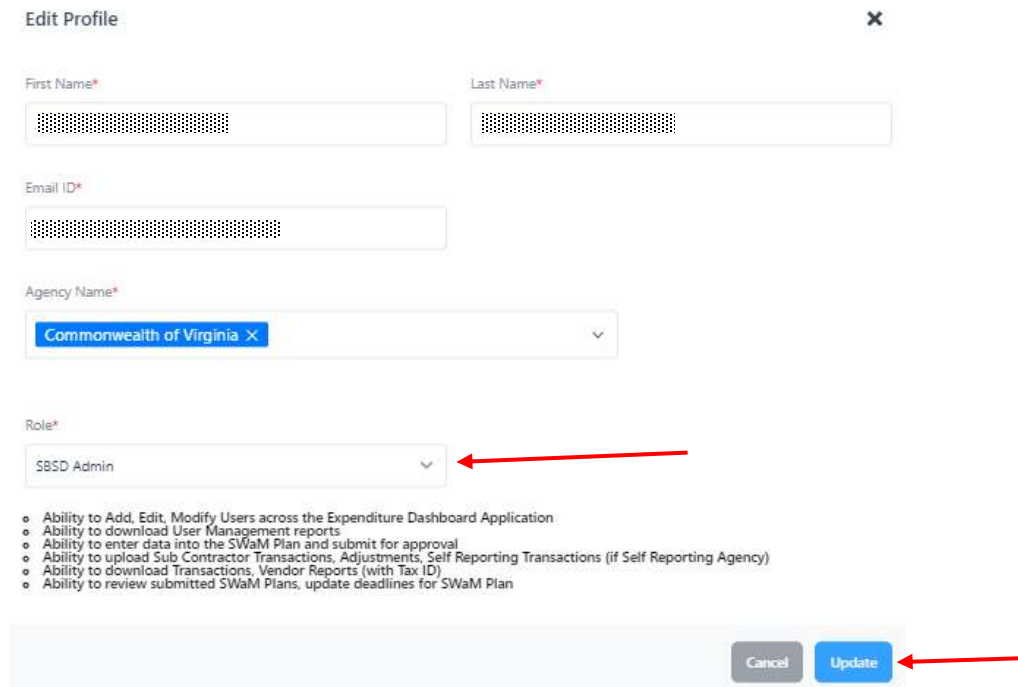
- Click the eyeball icon next to the user's name under actions.

Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
[REDACTED]	[REDACTED]	SWaM Plan Approver	Sep 17, 2019	Sep 25, 2020	3	[REDACTED] 

4. Click the Edit Profile button.



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



Edit Profile ✕

First Name* Last Name*

Email ID*

Agency Name* Commonwealth of Virginia ✕

Role* SBSD Admin

- o Ability to Add, Edit, Modify Users across the Expenditure Dashboard Application
- o Ability to download User Management reports
- o Ability to enter data into the SWaM Plan and submit for approval
- o Ability to upload Sub Contractor Transactions, Adjustments, Self Reporting Transactions (if Self Reporting Agency)
- o Ability to download Transactions, Vendor Reports (with Tax ID)
- o Ability to review submitted SWaM Plans, update deadlines for SWaM Plan

Cancel Update

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.

Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
[Redacted]	[Redacted]	SWaM Plan Approver	Sep 17, 2019	Sep 25, 2020	3	[Eye icon]

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

First Name: [Redacted] Last Name: [Redacted]

Email: [Redacted]

Role: SBSD Admin

Agency: Commonwealth of Virginia

Buttons: [Reset Password](#) [Edit Profile](#) [Deactivate](#)

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

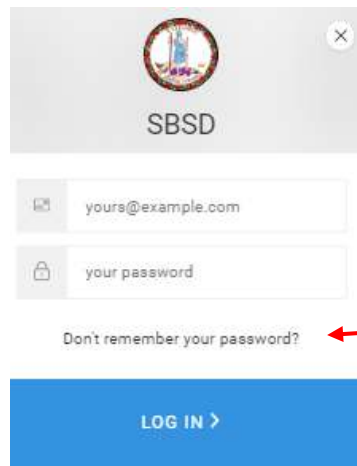
If a user has activated their account by clicking the link in the activation e-mail and created a password, but forgotten their password, they can request a password reset from the login screen or the Agency Owner can do it for them from the User Management page.

User

1. Click Login on the homepage.

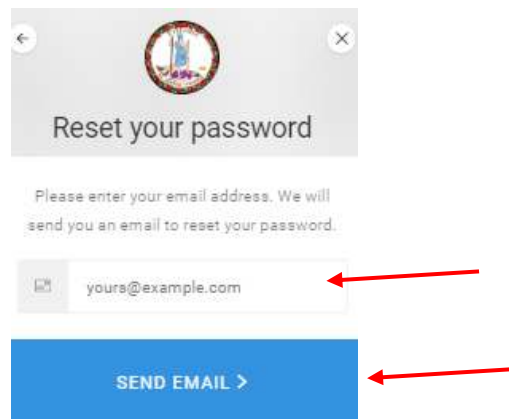
The screenshot shows a dashboard with various charts and a 'Login' button in the top right corner. A red arrow points from the 'Login' button on the dashboard to a larger 'Login' button on the right side of the page.

2. Click “Don’t remember your password?” Link



The screenshot shows a mobile login interface for SBSD. At the top is the SBSD logo. Below it are two input fields: one for an email address containing 'yours@example.com' and one for a password containing 'your password'. Below the password field is a link that says 'Don't remember your password?'. A red arrow points to this link. At the bottom is a blue button labeled 'LOG IN >'.

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



The screenshot shows a mobile password reset interface for SBSD. At the top is the SBSD logo. Below it is the title 'Reset your password'. Underneath is a prompt: 'Please enter your email address. We will send you an email to reset your password.' Below this is an input field for an email address containing 'yours@example.com'. A red arrow points to this field. At the bottom is a blue button labeled 'SEND EMAIL >'. A red arrow points to this button.

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](#).

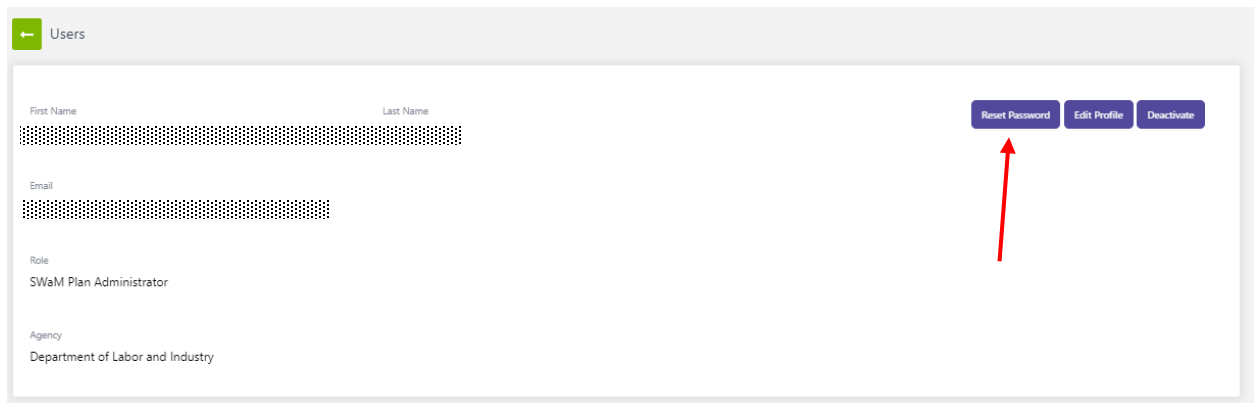
2. Search for the Name of the user who you want to send password reset e-mail to by entering their name in the search box and clicking the magnifying glass.



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

Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
[Redacted]	[Redacted]	SWaM Plan Approver	Sep 17, 2019	Sep 25, 2020	3	

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

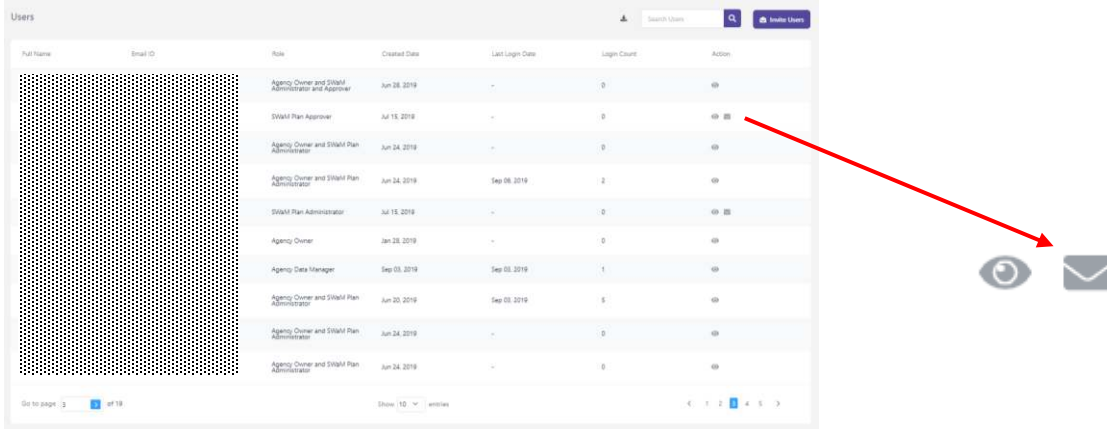
If a User has not yet activated their account, the Agency Owner will see an envelope icon next to the users name when going to user management. Activation e-mails are only good for a short period of time. If a user does not activate their account within that time period, the agency owner will need to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

1. Log into the Dashboard and go to User Management by following steps 1-3 under [setting up new users](#).

- 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.



- Click the envelope icon next to the user's name.



- 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.

