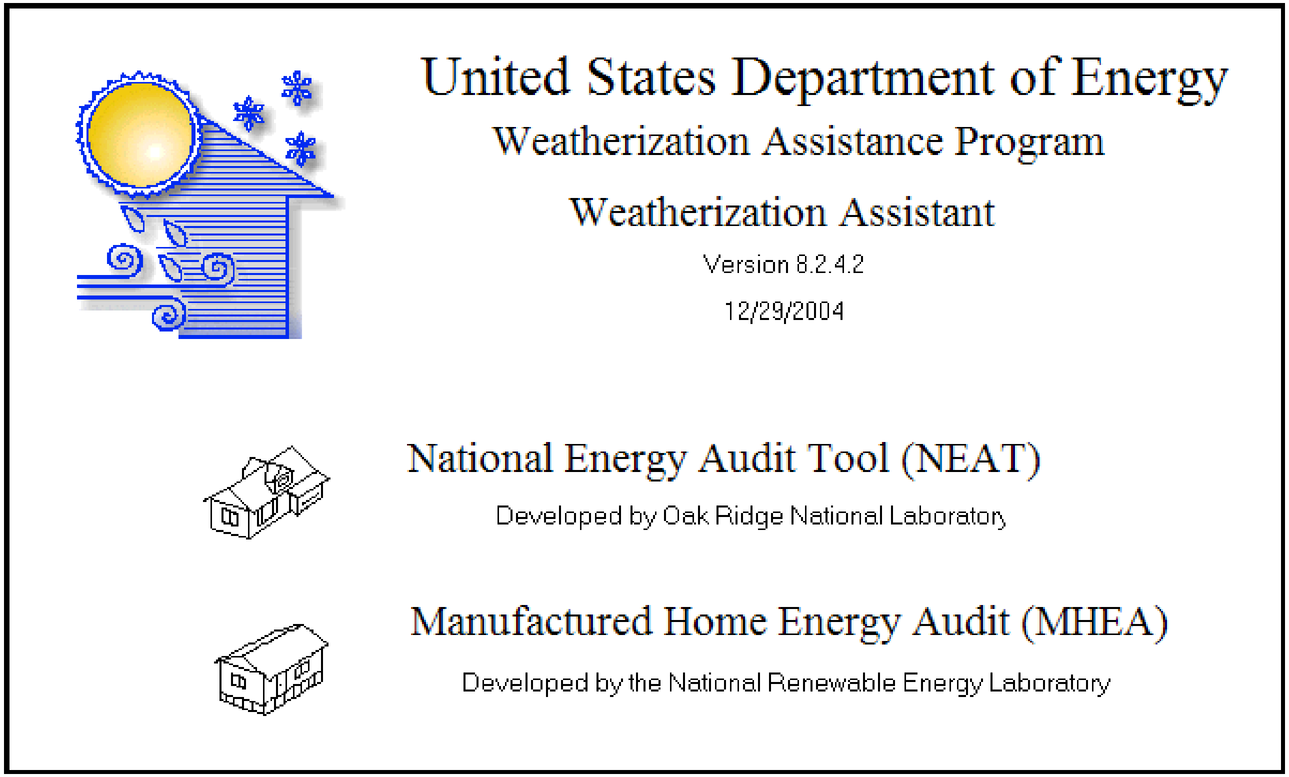
NEAT First Steps after Installation

5. Set Up Agency Users



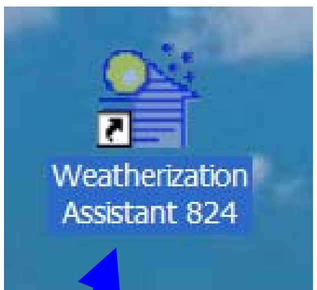
NEAT First Steps after Installation

After the current version (version 8.2.4.2 in this example) of NEAT has been installed, there are several steps that need to be performed to make NEAT ready for use by your agency. In general, these steps only need to be performed one time. There are additional steps that will be covered in another document.

- 1. Create your Agency - Create your agency record by copying the default agency record and renaming it to your agency. Fill in agency details, such as address, phone numbers, etc.
- 2. Create Supply Library - Create your agency's supply library by copying the default supply library and renaming it to identify it as belonging to your agency.
- 3. Create Setup Library - Create your agency's setup library of weatherization measures by copying the default setup library and renaming it to identify it as belonging to your agency.
- 4. Create Initial Client Survey - Create your agency's Initial Client Survey by copying the default Initial Client Survey and associating it with your agency.
- **5. Set Up Agency Users - Create agency users, such as auditors, suppliers, and other users. They are stored as Contacts associated with the Agency.**

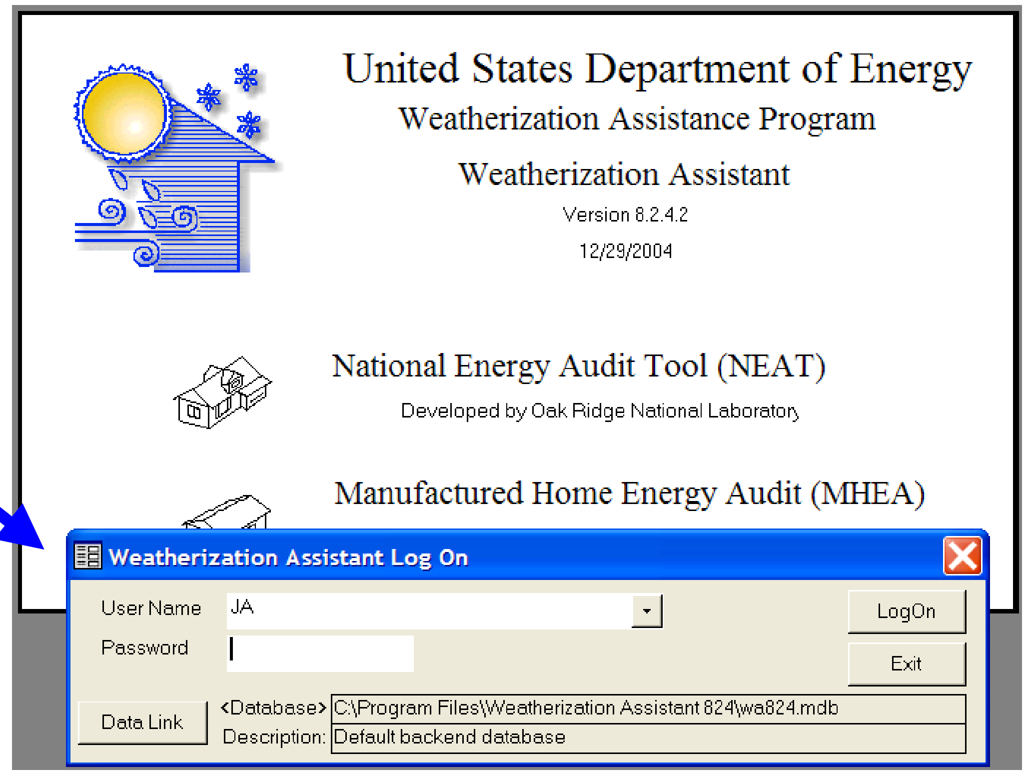
NEAT First Steps after Installation

Login to NEAT using the default login name and password, so that you can access the various features. When NEAT is first installed the default login user is “Jane Admin”, having a short user name of “JA”, and a password of “admin”. The password is case-sensitive.



Double-click on the NEAT shortcut icon

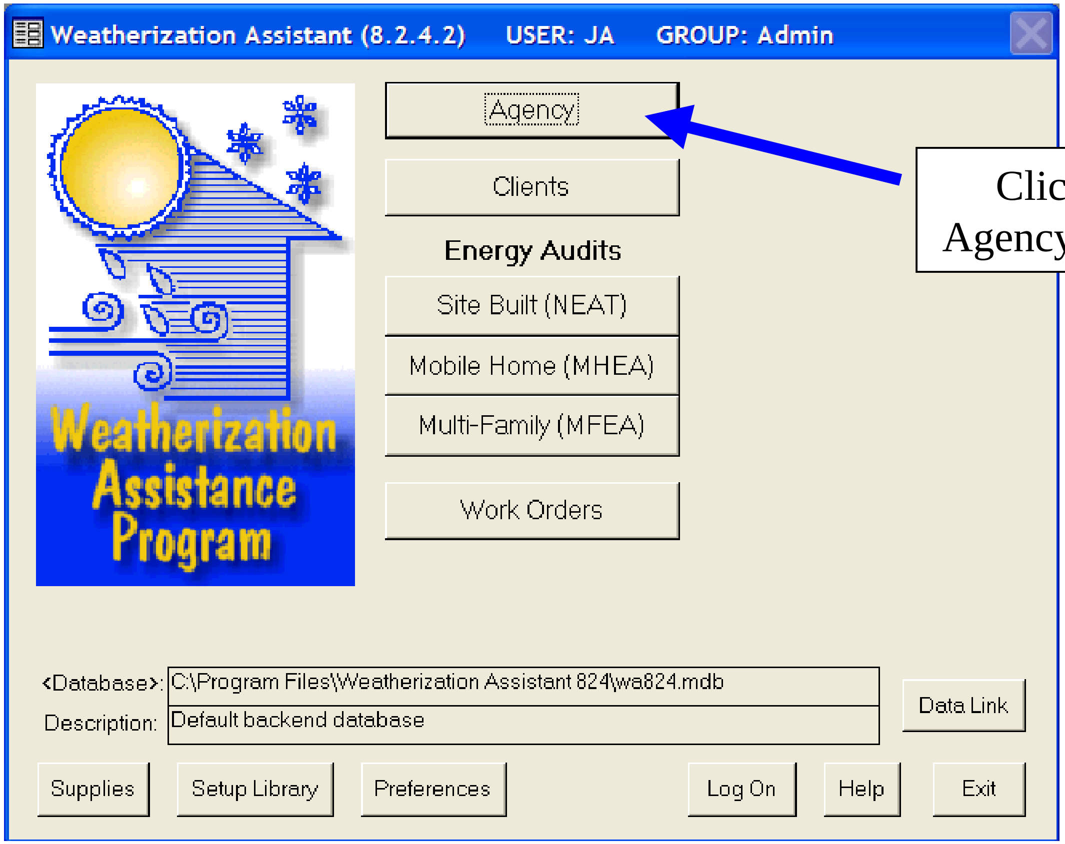
Opens the Log On form



NEAT First Steps after Installation

5. Set Up Agency Users

From the main screen click on the Agency button to show the Agency screen.

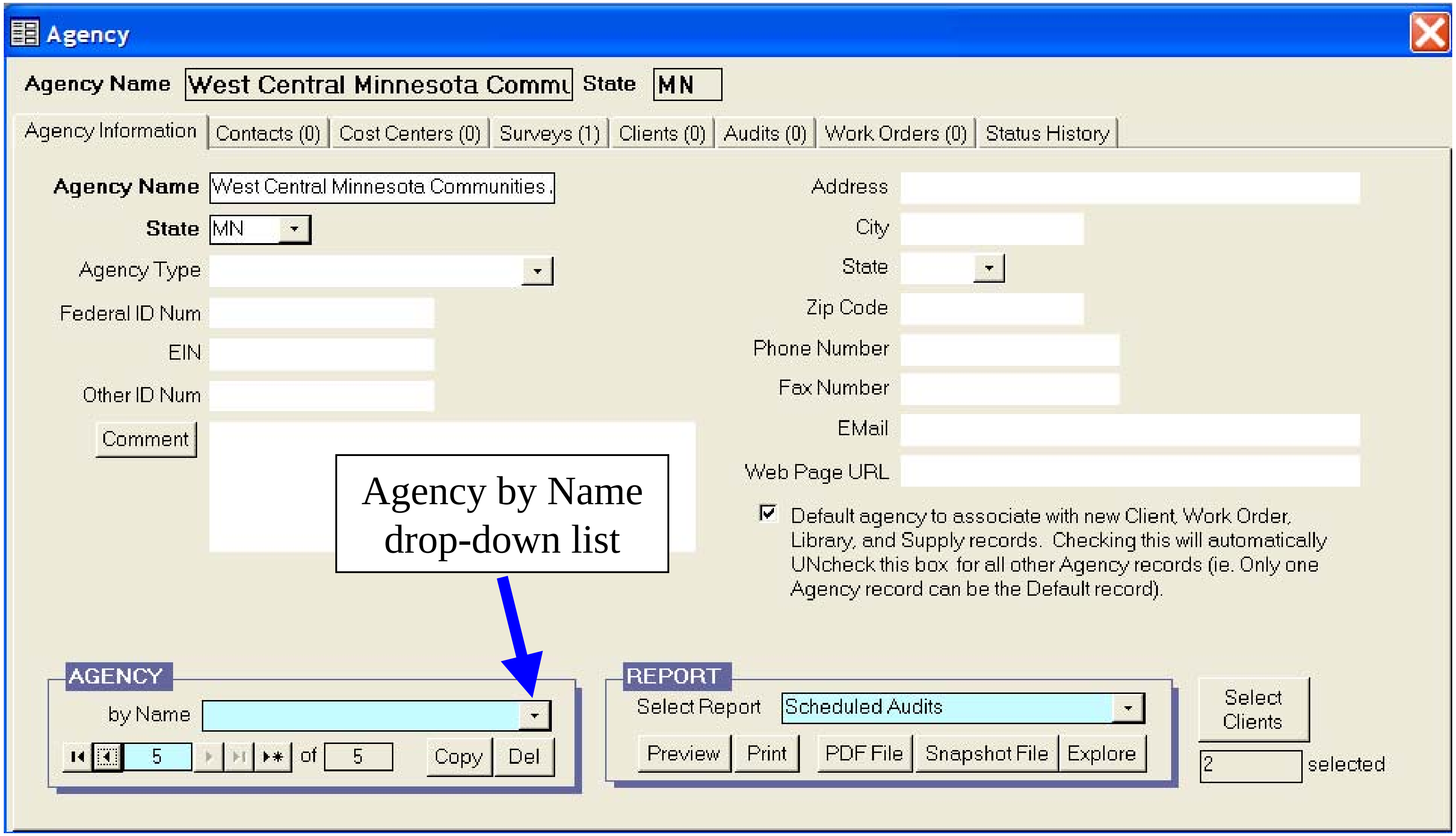


Click on Agency button

NEAT First Steps after Installation

5. Set Up Agency Users

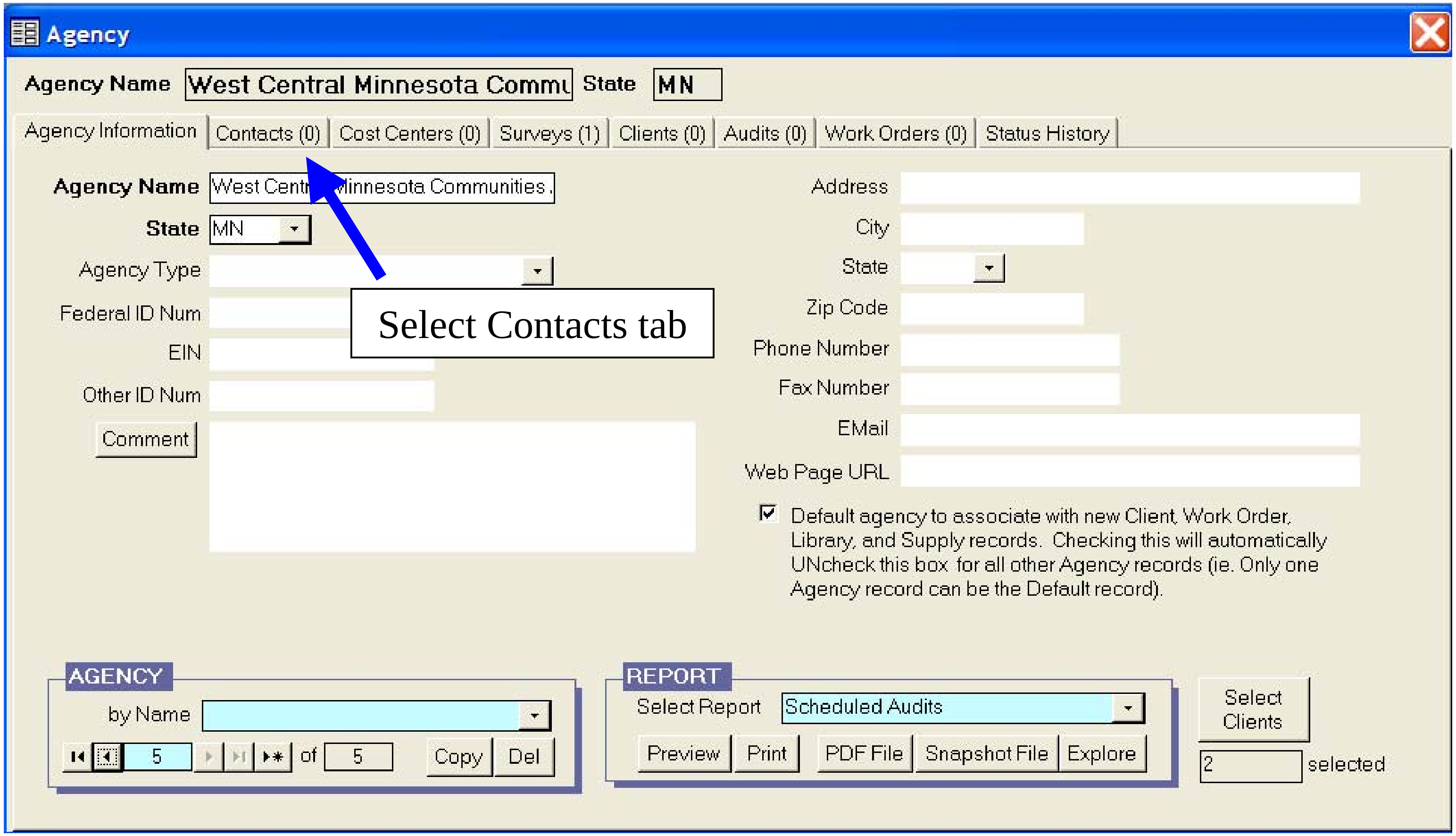
Your agency should be shown by default when the Agency screen opens. If it isn't shown, select your agency record by using the find Agency by Name drop-down list in the lower left corner of the screen.



NEAT First Steps after Installation

5. Set Up Agency Users

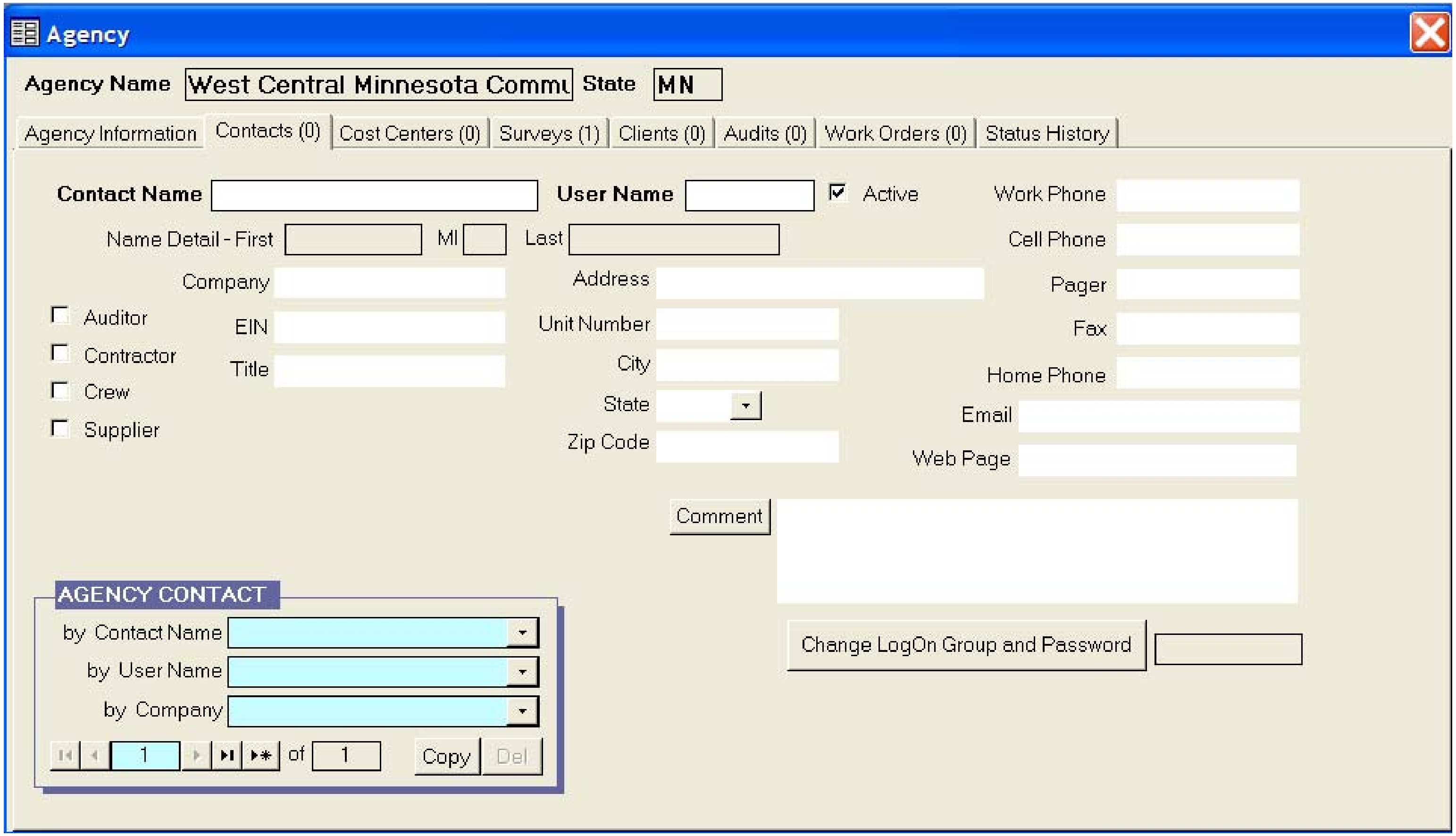
Select the Contacts tab. It should currently be labeled “Contacts (0)” since no contacts have been added to your agency yet. Contacts will eventually include contractor records that get downloaded from eHEAT, as well as agency users, such as auditors, data entry personnel, and coordinators.



NEAT First Steps after Installation

5. Set Up Agency Users

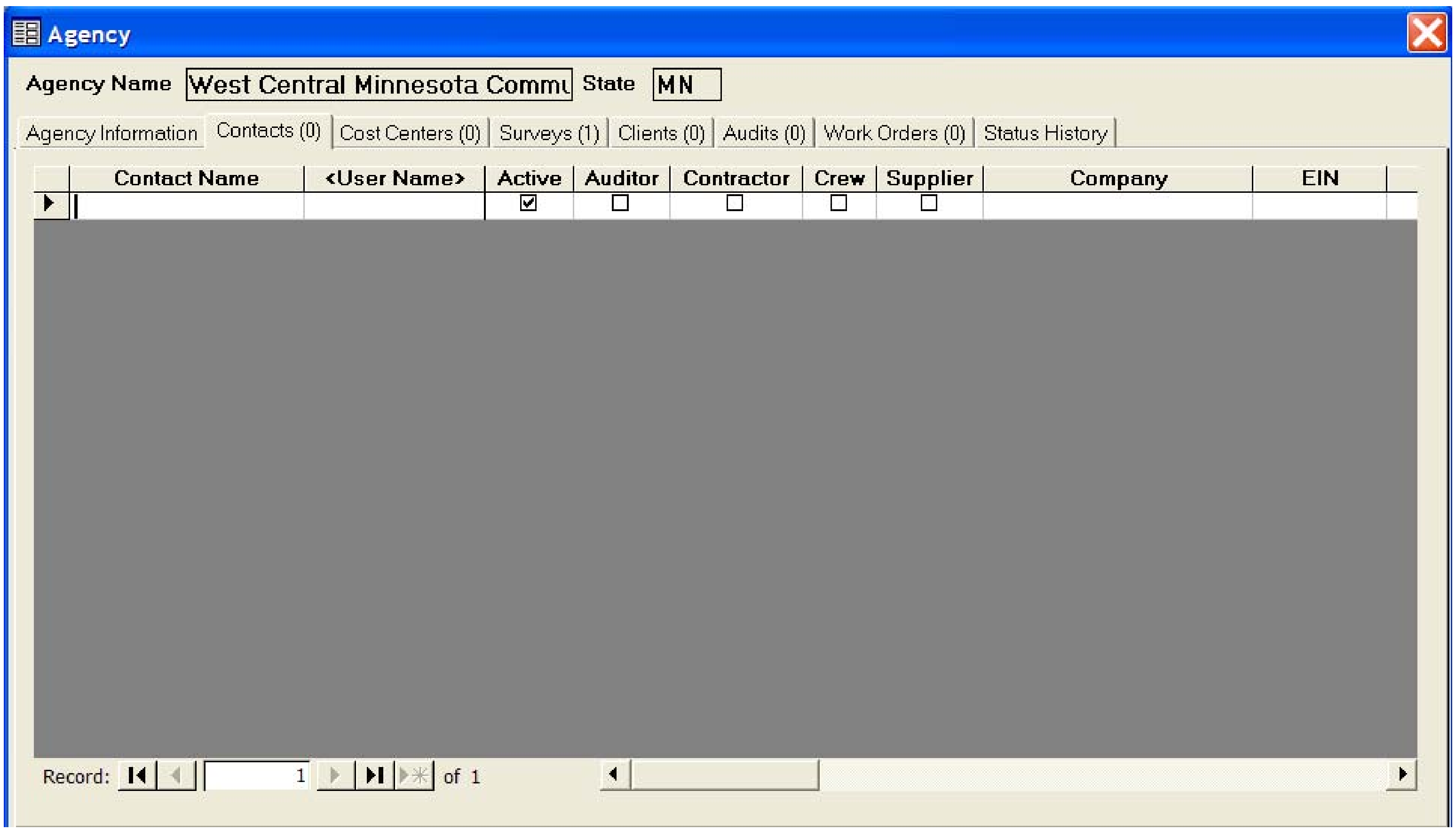
The Contacts screen will be shown in one of two views. The view below (form view) is generally the default view that will be shown. The next slide shows the same fields in datasheet view.



NEAT First Steps after Installation

5. Set Up Agency Users

The Contacts screen is shown in datasheet view below. Though all of the fields aren't visible at the same time, the horizontal scroll bar along the bottom can be used to view fields that aren't currently visible on the screen.

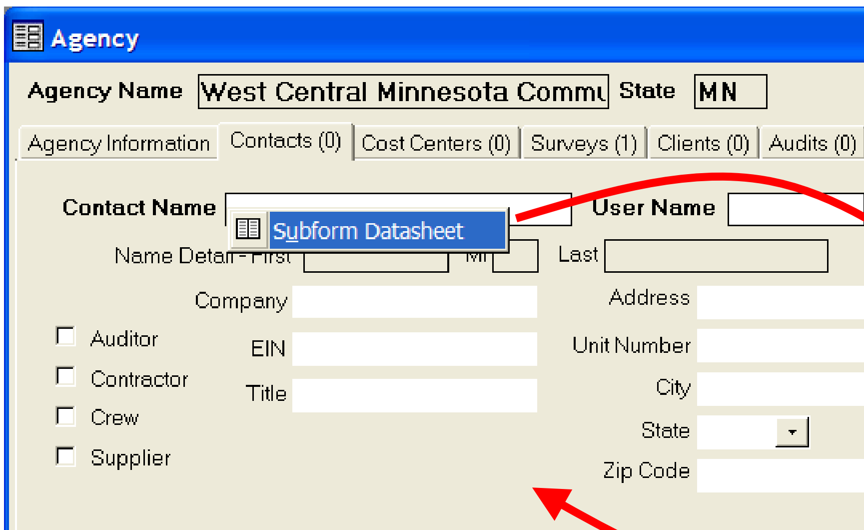


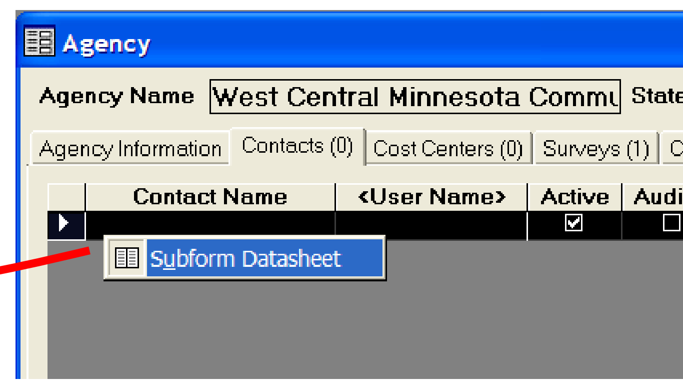
NEAT First Steps after Installation

5. Set Up Agency Users

You can switch between these two views of the Contacts tab (and several other tabs and forms in NEAT) by clicking on the right mouse button almost anywhere on the screen, to show the following toggle button: Subform Datasheet When the mouse cursor is moved over this toggle button, the button turns blue: Subform Datasheet Clicking on this toggle button will switch between the form and datasheet views.

Datasheet view is helpful when needing to view multiple records at the same time. Data can also be entered and edited from this screen.



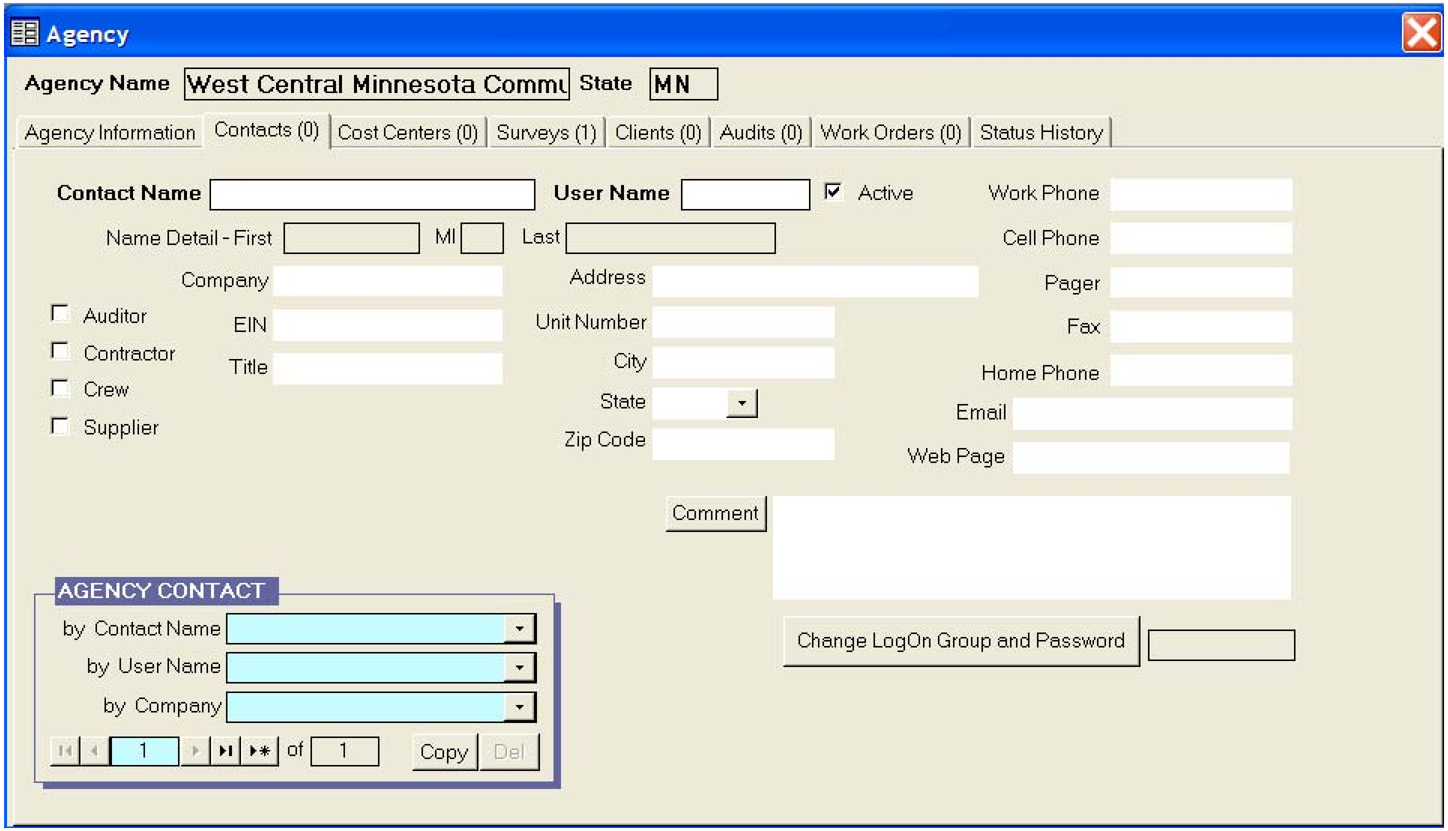


Form view is helpful for entering data into individual records.

NEAT First Steps after Installation

5. Set Up Agency Users

The Contacts screen is where various Agency contact information is entered and stored. ALL contractors and crew associated with the agency will be imported to the Contacts list via a data file downloaded from eHEAT. Auditors, suppliers, and any other agency contacts need to be manually entered into NEAT.

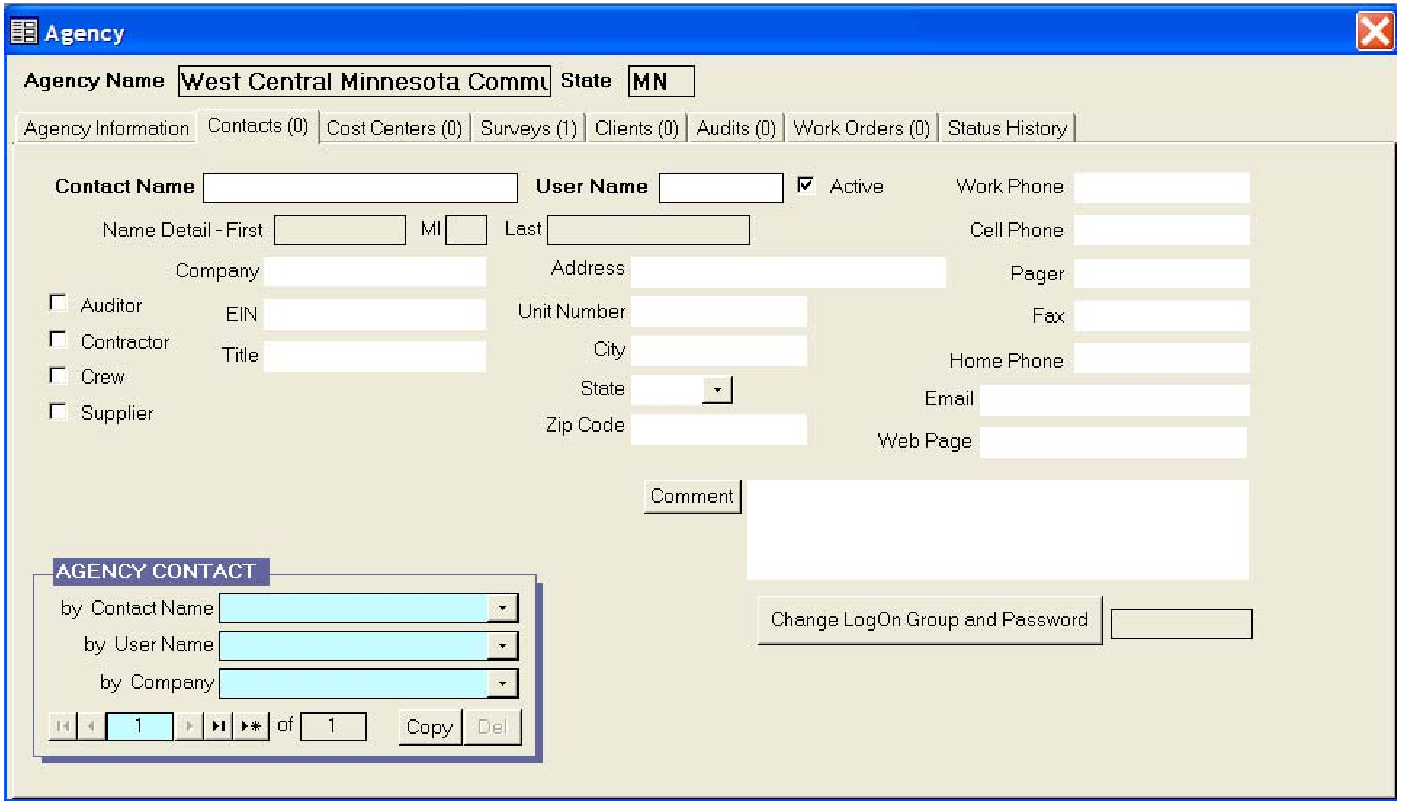


NEAT First Steps after Installation

5. Set Up Agency Users

In this example, two agency users will be entered - one will be an auditor with “Admin” rights and one will be a non-auditor with “User” rights. A detailed description of the “Admin” and “User” rights is provided in the last few slides at the end of this document.

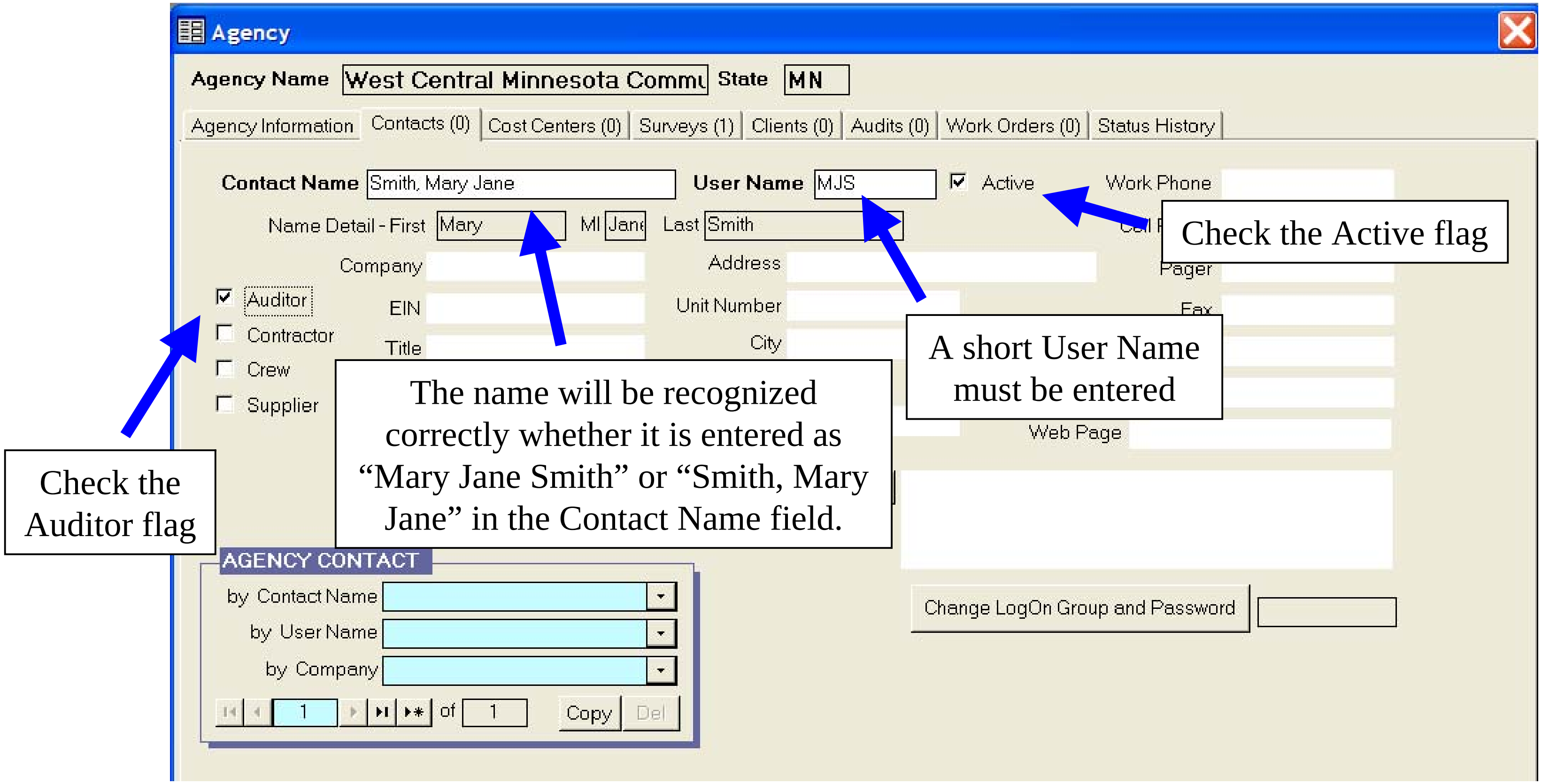
The first time the Contacts screen is shown, the user’s name can be entered directly into the Contact Name field without specifically creating a new record.



NEAT First Steps after Installation

5. Set Up Agency Users

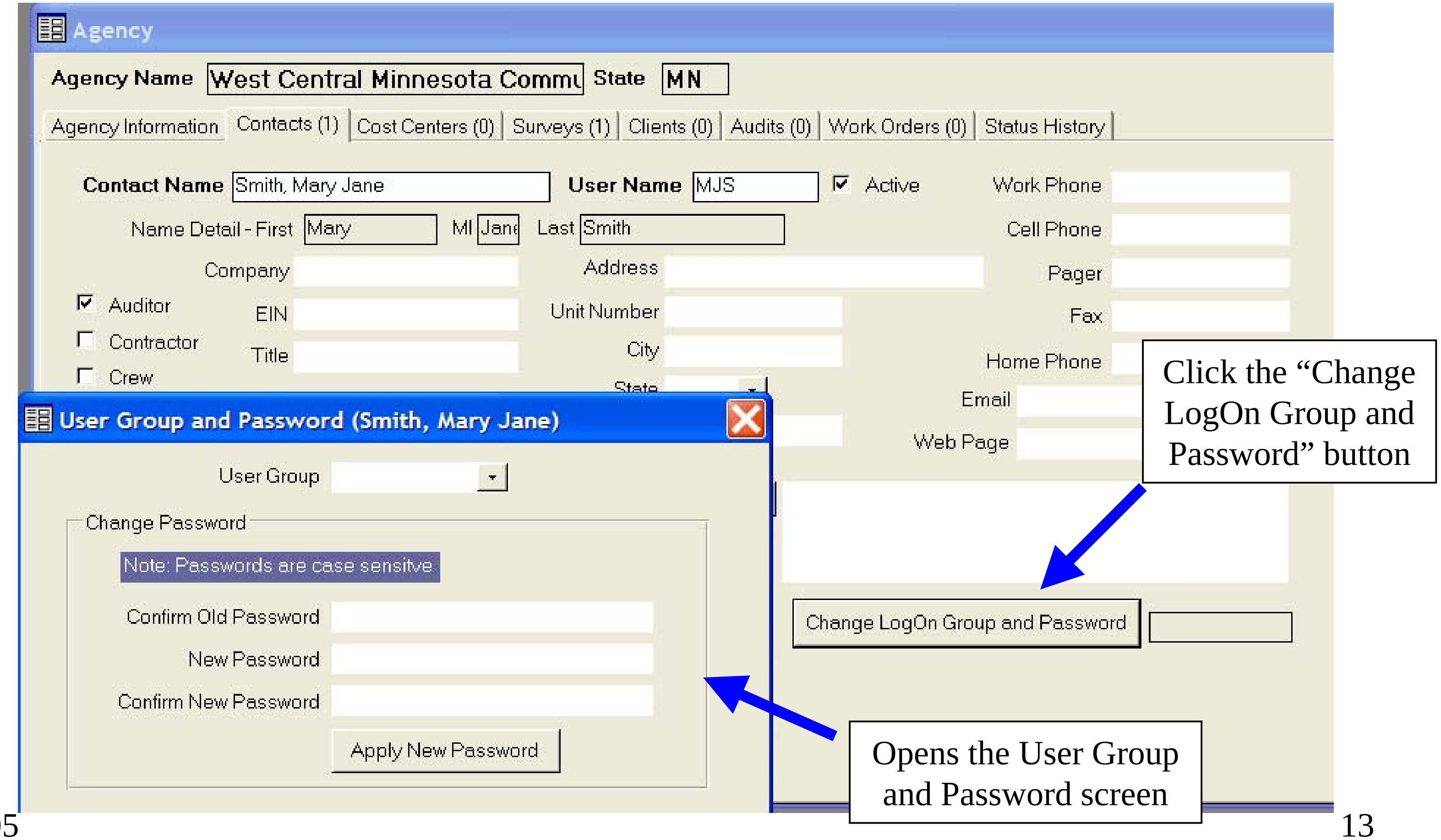
In the following example, assume the user is an auditor named Mary Jane Smith. In addition to entering the Contact Name, enter a short User Name, which will be shown on various drop-down lists. The Auditor check box needs to be selected since she is an auditor, and the Active check box needs to be selected since she is an active contact. Selecting the Auditor check box will ensure that this user's name can be selected later from several drop-down lists where it is appropriate. If the Active check box is not checked, this user will not show on any drop-down lists, including the user logon screen.



NEAT First Steps after Installation

5. Set Up Agency Users

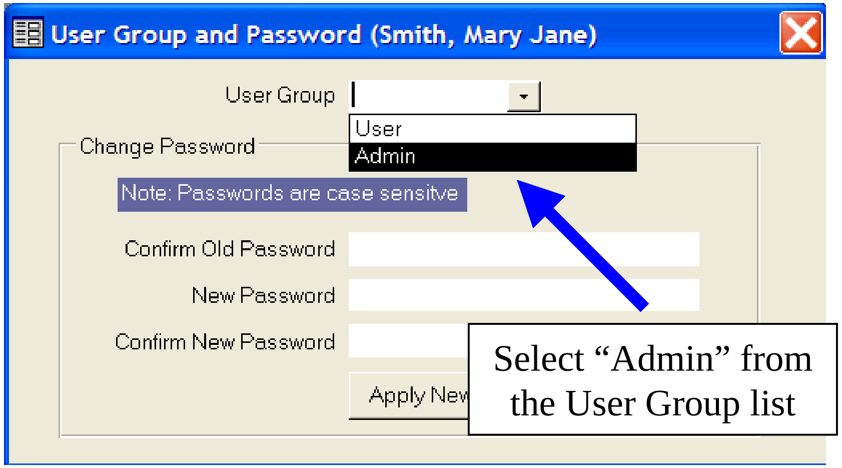
In order for this agency contact to show up in the list of users in the logon screen at startup, the contact needs the following four characteristics: (1) have a value in the User Name field, (2) have the Active check box selected, (3) be assigned to a User Group, and (4) have a value in the Password field. The password gets entered for this contact by clicking on the “Change LogOn Group and Password” button, which pops up the User Group and Password screen.



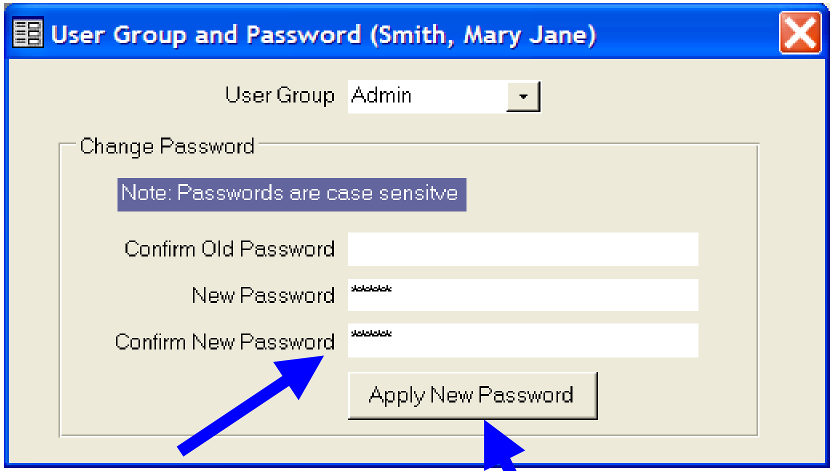
NEAT First Steps after Installation

5. Set Up Agency Users

Since this example user is intended to be an auditor with Admin rights, select “Admin” from the User Group drop-down list. In the Change Password section of the form, enter a password in the New Password field, and then re-enter the same password in the Confirm New Password field. Since this is the first time this user has been entered, there is no old password to enter in the Confirm Old Password field. The new password entered in this example is “smith2”. Do not include the quotes in the password. The password must be at least 4 characters long and can include letters and numbers. The password is case-sensitive, so “smith2” is different than “Smith2”.



Select “Admin” from the User Group list



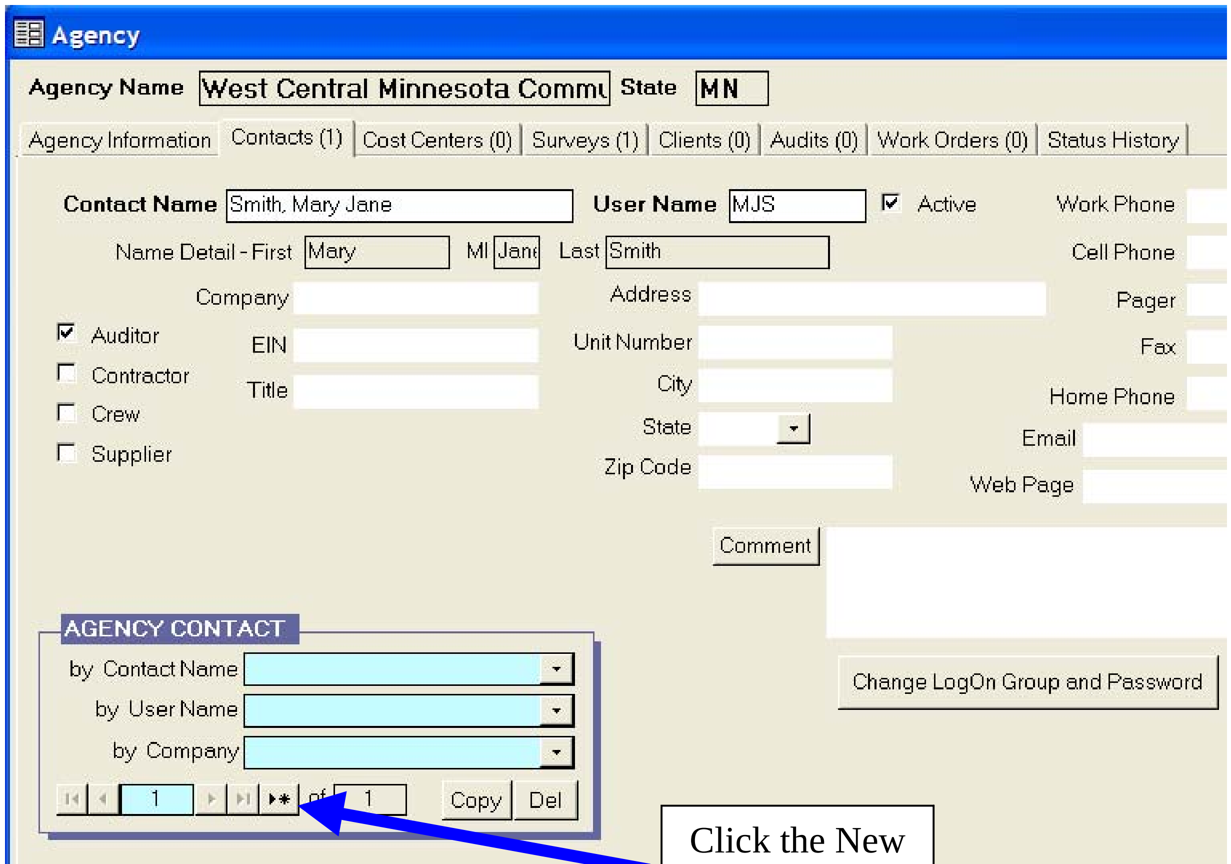
Enter the password in the New Password and Confirm New Password fields

Select Apply New Password to store the user group and password for this contact

NEAT First Steps after Installation

5. Set Up Agency Users

After applying the password for the first user, the User Group and Password screen will close, and the Contacts screen will be shown again. To create another user select the “New Blank Record” button: ▸* . This will create a new Contact record with a default Contact Name, e.g. “Contact(2)”, which can be typed over with the actual user’s name.



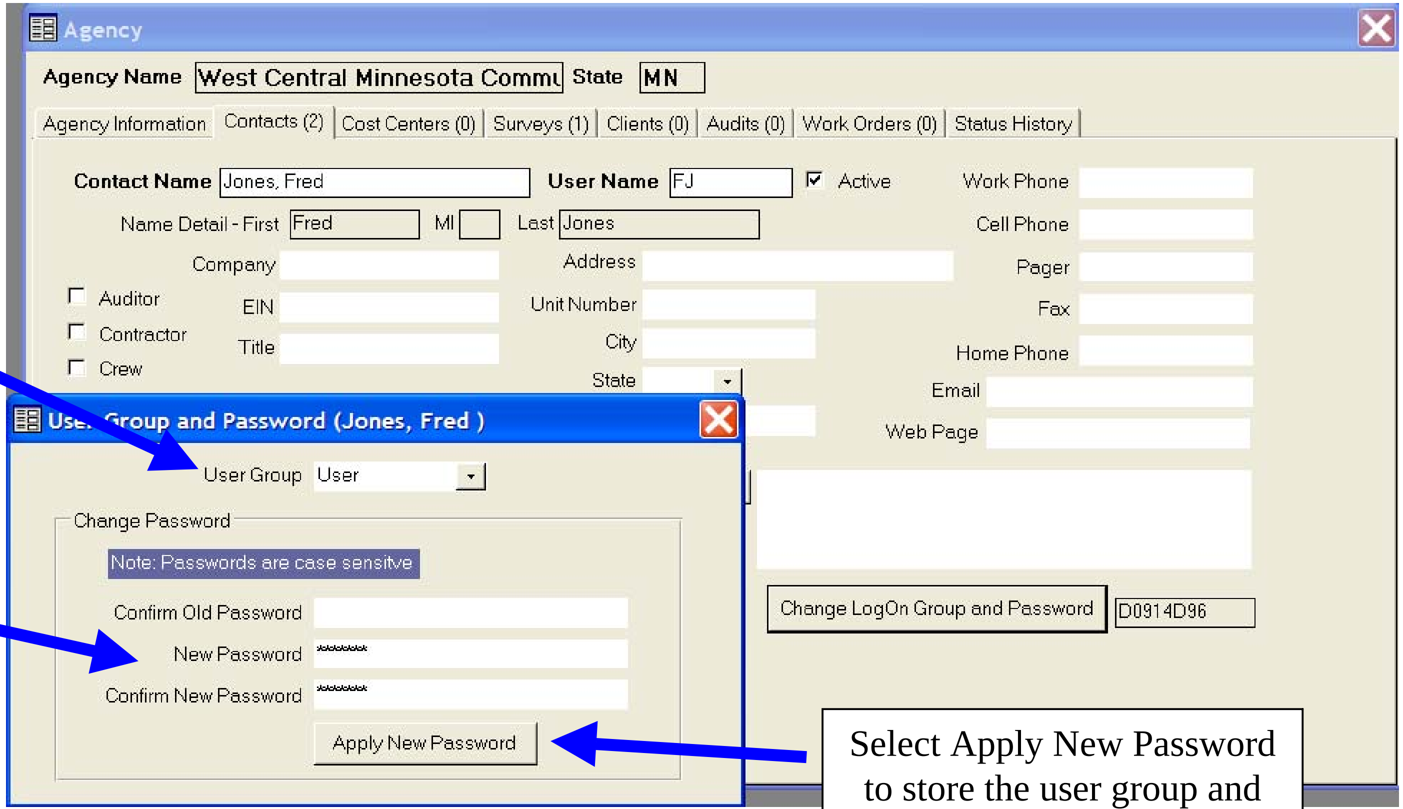
Click the New BLANK Record button

NEAT First Steps after Installation

5. Set Up Agency Users

In this example, assume the second user is not an auditor and will have "User" rights. The user's name is Fred Jones, and he will be assigned a User Name of FJ. The Auditor check box will not be selected since he is not an auditor, but the Active check box needs to be selected since he is an active contact. Even though this user will not be an Auditor and will not have Admin rights, this person's User Name will still be available for selection from specific drop-down lists.

"User" was selected from the User Group list



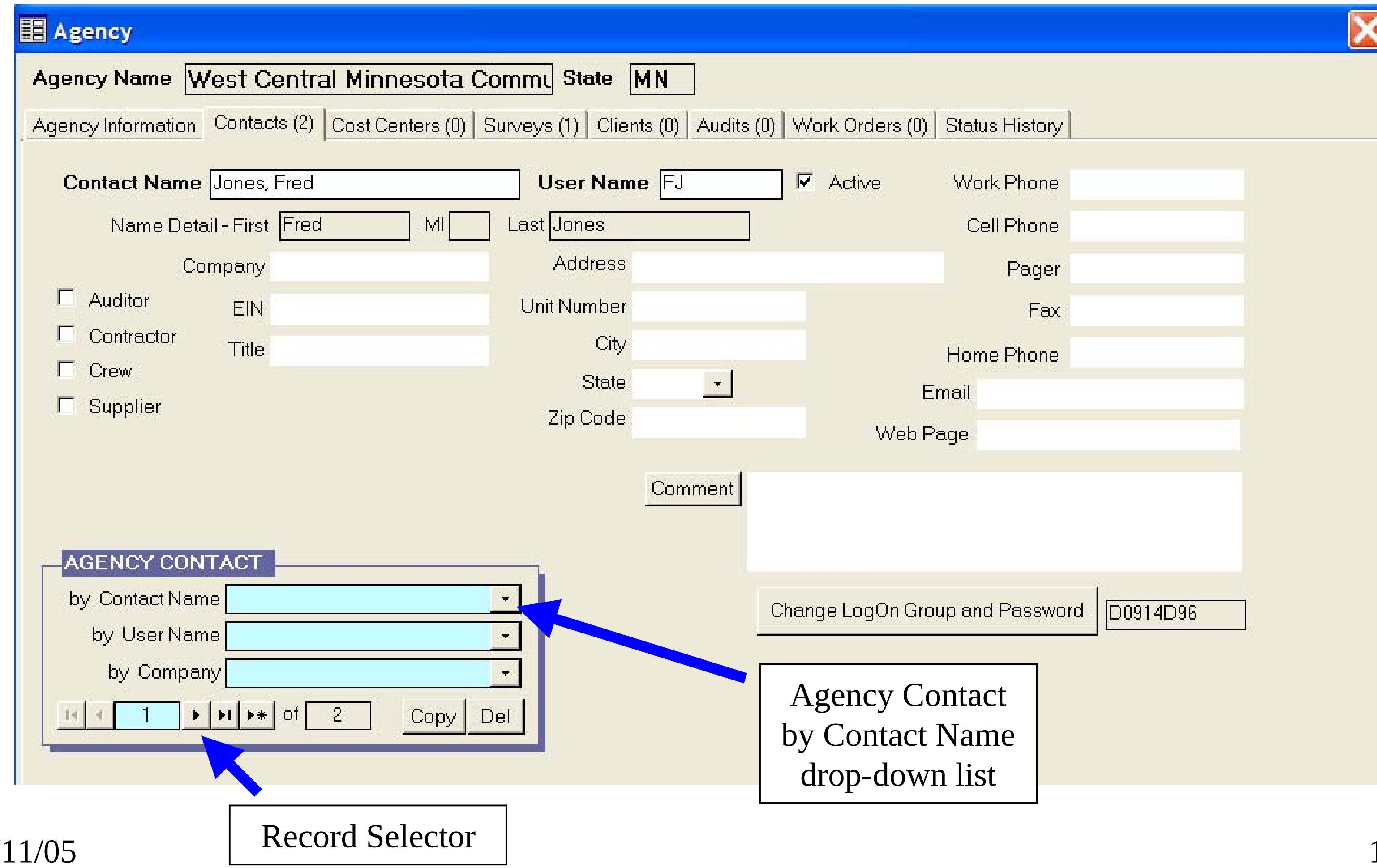
This user's password was entered as "fishing"

Select Apply New Password to store the user group and password for this contact

NEAT First Steps after Installation

5. Set Up Agency Users

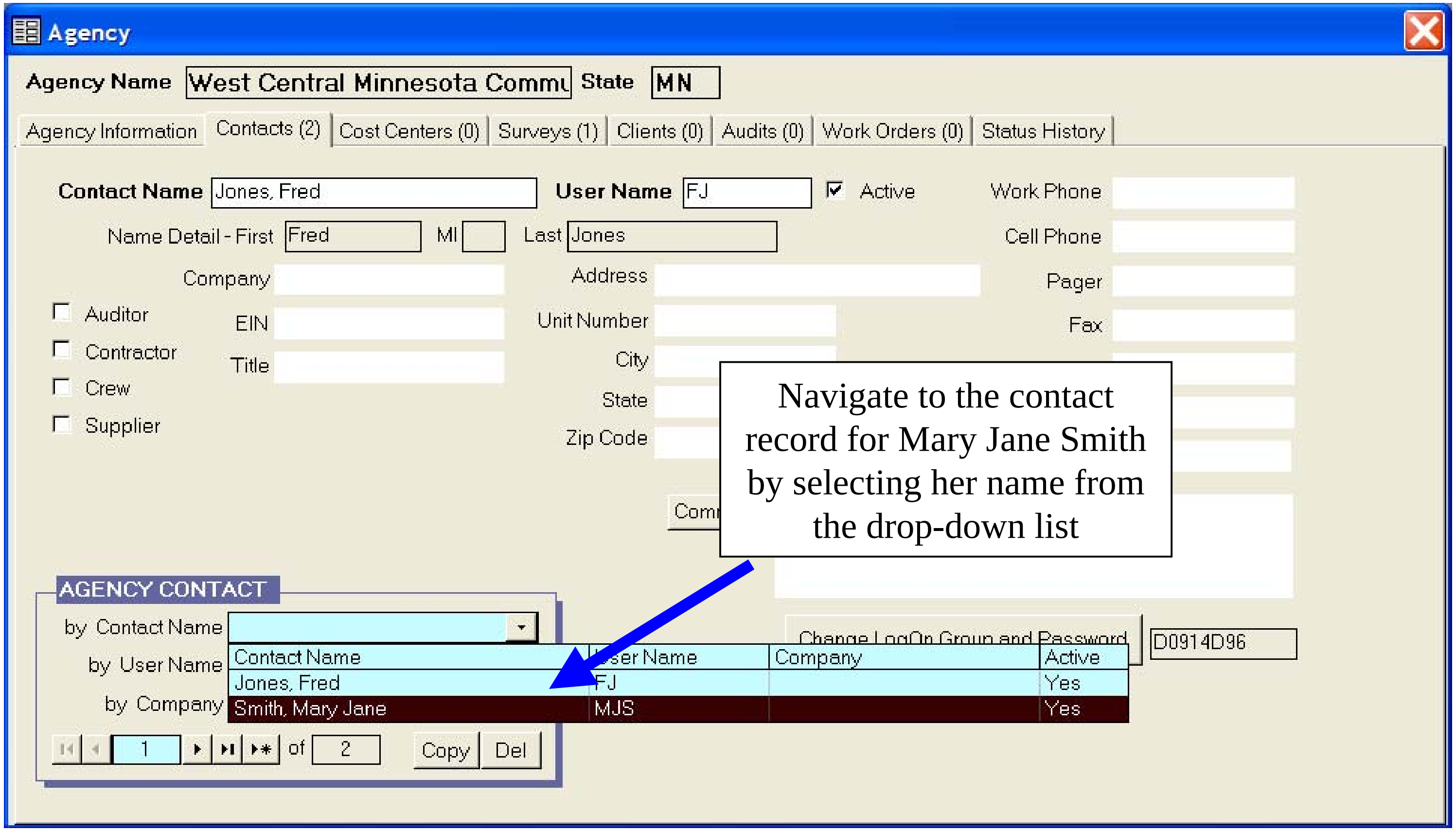
After applying the password for the second user, the User Group and Password screen will close, and the Contacts screen will be shown again. The Contacts tab now shows "Contacts (2)", which indicates that two contacts have been entered. You can select a specific contact via either the record selector or by using the find features, such as Agency Contact by Contact Name, etc.



NEAT First Steps after Installation

5. Set Up Agency Users

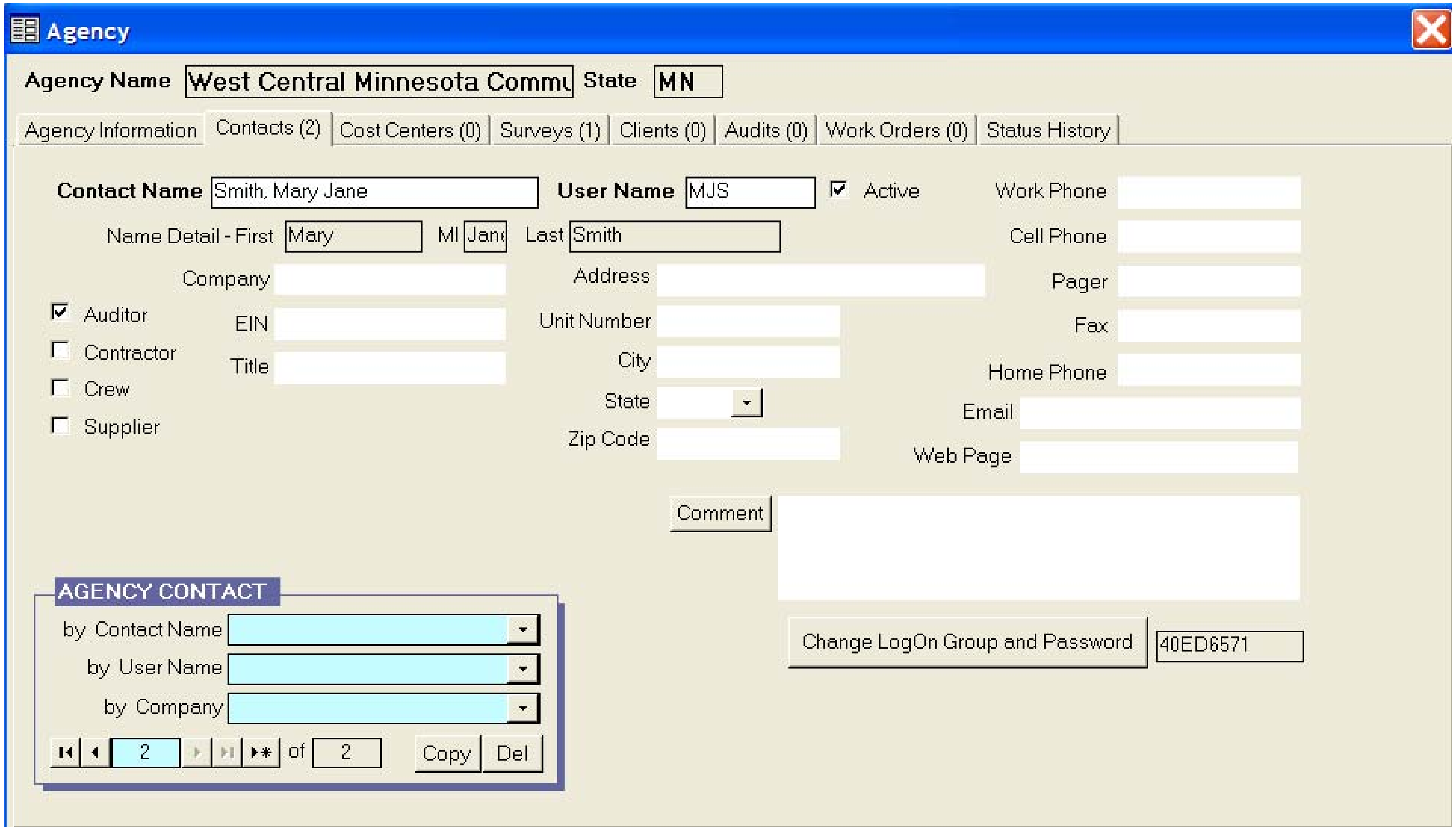
For example, you can now select the record for Mary Jane Smith by selecting her name from the Agency Contact by Contact Name drop-down list. Selecting her name will then refresh the Contacts screen to show her contact record, as shown in the slide on the following page. This same type of navigation and selection process works in many of the tabs and screens throughout NEAT.



NEAT First Steps after Installation

5. Set Up Agency Users

After selecting Mary Jane Smith from the Agency Contact by Contact Name drop-down list, she is now shown as the current record on the Contacts screen.

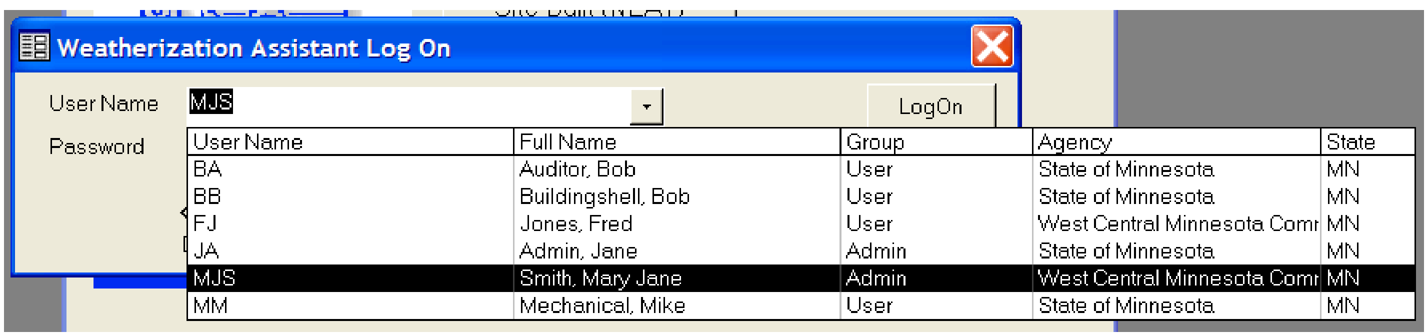


NEAT First Steps after Installation

5. Set Up Agency Users

In this example, after creating the two contacts for West Central Minnesota Communities Action, Inc., there are a total of six contacts that will show up in the drop-down list of potential users when logging into NEAT. This is shown in the log on screen below. There are six contacts currently showing because there were originally four contacts that had been already set up with the State of Minnesota default agency when the software was installed. Your original set up required logging in as "Jane Admin" with a password of "admin". That user was a contact for the State of Minnesota agency.

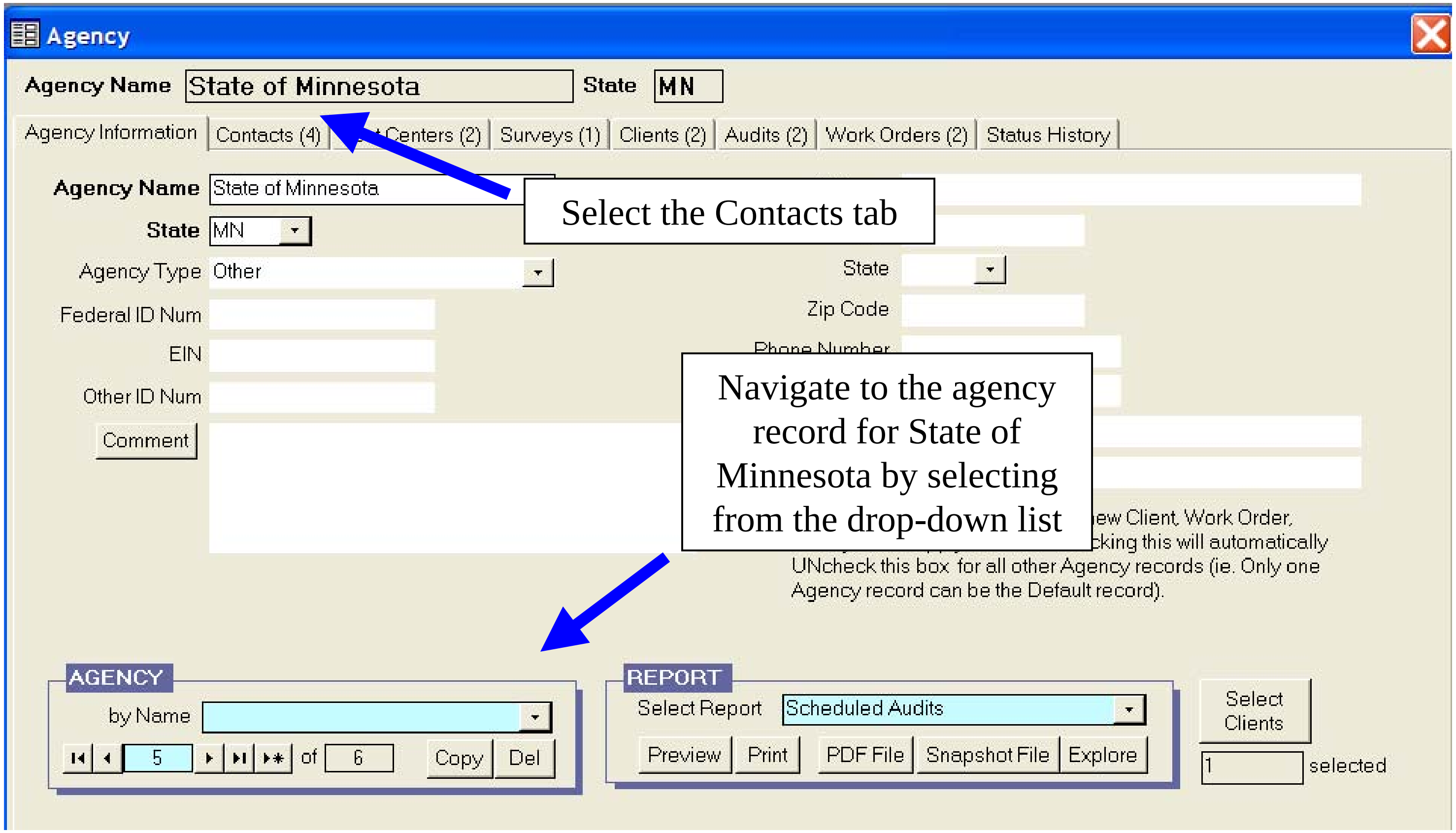
After you have set up your own agency and associated contacts which are NEAT users, you will presumably want to see only the users that are associated with your own agency, which in this example, is West Central Minnesota Communities Action, Inc. This can be accomplished by making the users for the State of Minnesota agency inactive.



NEAT First Steps after Installation

5. Set Up Agency Users

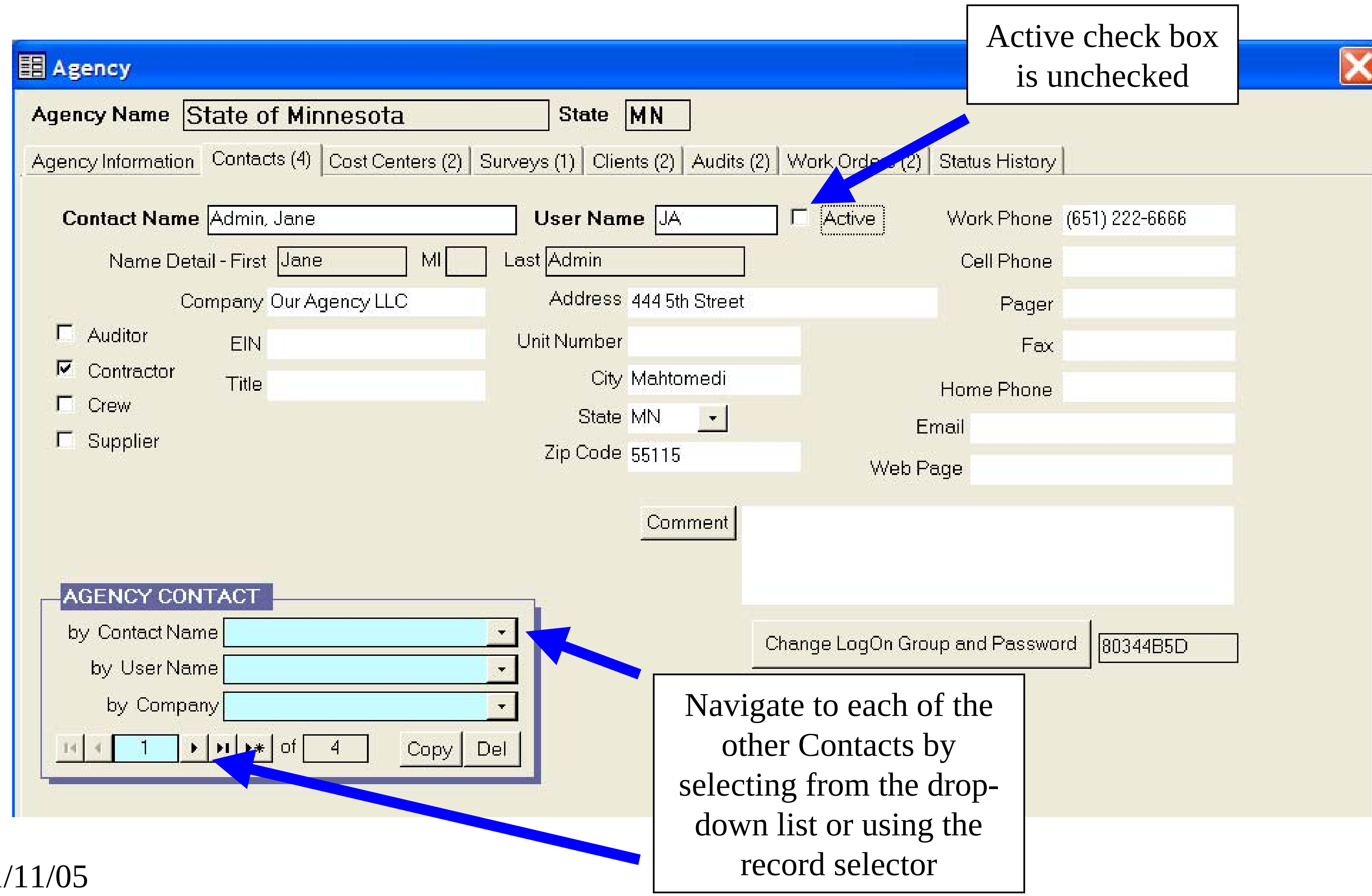
The users for the State of Minnesota agency can be made inactive by first navigating to the Agency screen (by clicking on the Agency button on the Main screen) and making the State of Minnesota the current record. From there select the Contacts tab. From the Contacts screen, each user will be made inactive, as described on the following slide.



NEAT First Steps after Installation

5. Set Up Agency Users

The first contact/user for the State of Minnesota agency is shown. Make this user inactive by unchecking the Active check box. Then navigate to each of the other three contact/users for this agency and follow the same process to make each user inactive.

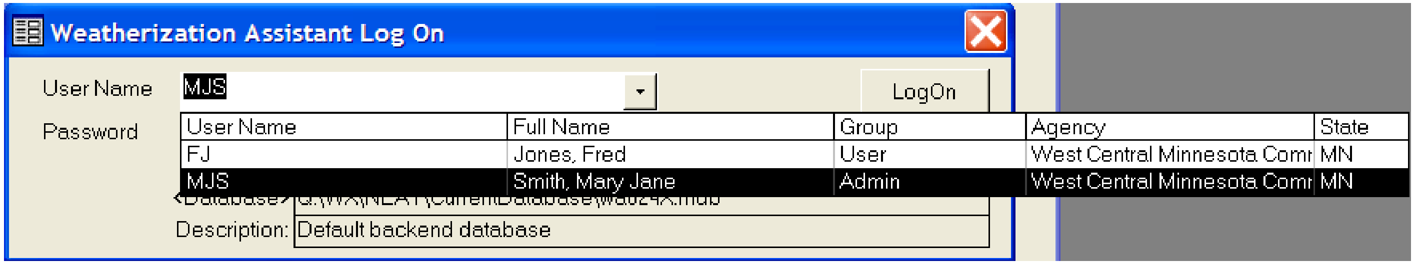


NEAT First Steps after Installation

5. Set Up Agency Users

After making all four of the contact/users for the State of Minnesota agency inactive, the next time that the log on screen is shown, the only users visible in the drop-down list should be those that you set up for your agency. You will have assigned them to a User Group (either "User" or "Admin"), provided them with a password, and marked them as Active on the Contact screen.

In the example used in this document, the log on screen (shown below) should now show only the two users that were set up.



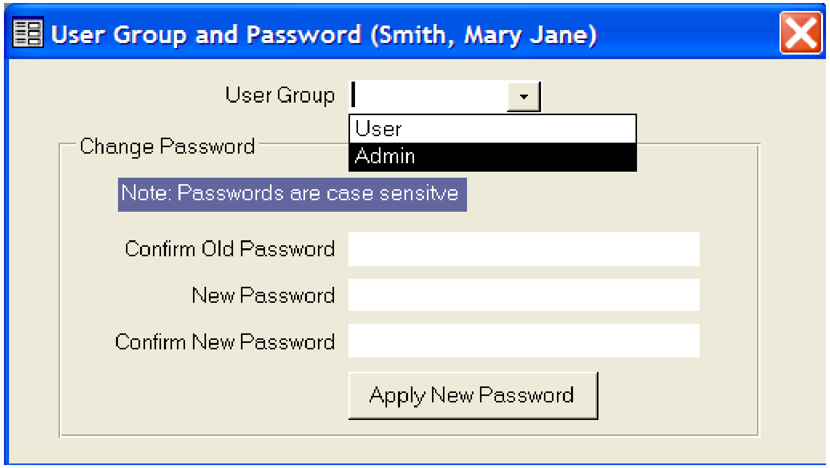
NEAT First Steps after Installation

5. Set Up Agency Users

User Groups

Currently, an agency contact can be assigned to one of two User Groups - “Admin” or “User”, or not be assigned to a User Group at all. In general, an agency contact will only be assigned to one of the two User Groups if the contact needs to be able to log in to NEAT. Agency contacts that are imported via a downloaded file from eHEAT (contractor and crew records) will not generally need to log in to NEAT. Agency contacts that are manually entered, such as auditors and other NEAT users, will more likely need to log in to NEAT to perform data entry or other functions.

The assignment of a contact to have “User” or “Admin” permissions is done via the User Group and Password screen which is opened by clicking the “Change Log On Group and Password” button on the Contacts screen. The selection of “User” or “Admin” is done from the User Group drop-down list as shown below.



NEAT First Steps after Installation

5. Set Up Agency Users

Description of User Group permissions

1. Admin

A contact assigned to the "Admin" User Group has permission to view, enter, edit, and delete any type of data, including Agency, Client, Audit, Work Order, and Supply and Setup Library records. The user will generally be shown a warning message when an attempt is made to delete any of these records. This is currently the User Group level that has the highest level of permissions in NEAT.

2. User

A contact assigned to the "User" User Group has permission to view, enter, and edit any type of data, including Agency, Client, Audit, Work Order, and Supply and Setup Library records. Currently the "User" permission level does not allow the contact to delete any records, with the following exceptions. If the contact having "User" permission is an Auditor or Contractor (Auditor and/or Contractor check box is selected on the Client screen), that contact is able to delete Work Order records. In addition, if the contact having "User" permission is an Auditor, that contact is able to delete Audit records. The user will generally be shown a warning message when an attempt is made to delete any of these records.

NEAT First Steps after Installation

5. Set Up Agency Users

Additional details of User Group permissions

1. Admin
Only a contact/user having “Admin” permission can assign user groups and passwords. This means that only “Admin” users can create new contact/user records that can be used for logging into NEAT. This is because a contact/user must be assigned to a user group and have a password, in order to allow logging into NEAT.
A contact/user having “Admin” permission can change any other user’s password without having to type in the old password in the Confirm Old Password field.

2. User
A contact/user having “User” permission can create new contact records within the Agency, but does not have sufficient permission to assign the contact to a user group. After a contact/user having “User” permission has been set up and assigned to the “User” User Group by a person having “Admin” permission, that user can change their own password if they type in their old password for confirmation.