

NEAT First Steps after Installation

5. Set Up Agency Users



United States Department of Energy
Weatherization Assistance Program
Weatherization Assistant
Version 8.2.4.2
12/29/2004



National Energy Audit Tool (NEAT)
Developed by Oak Ridge National Laboratory



Manufactured Home Energy Audit (MHEA)
Developed by the National Renewable Energy Laboratory

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

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National Energy Audit Tool (NEAT)
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Manufactured Home Energy Audit (MHEA)

Weatherization Assistant Log On

User Name JA

Password

Data Link <Database> C:\Program Files\Weatherization Assistant 824\wa824.mdb
Description: Default backend database

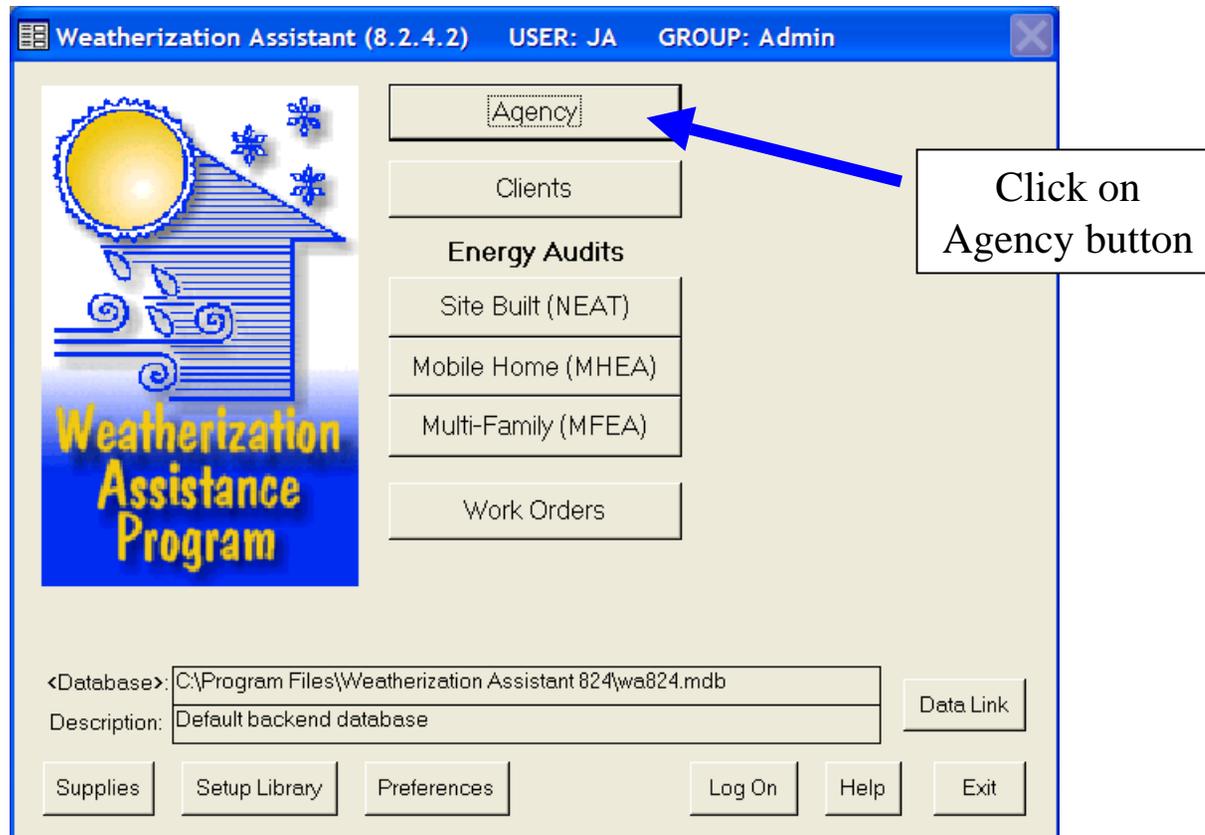
LogOn

Exit

NEAT First Steps after Installation

5. Set Up Agency Users

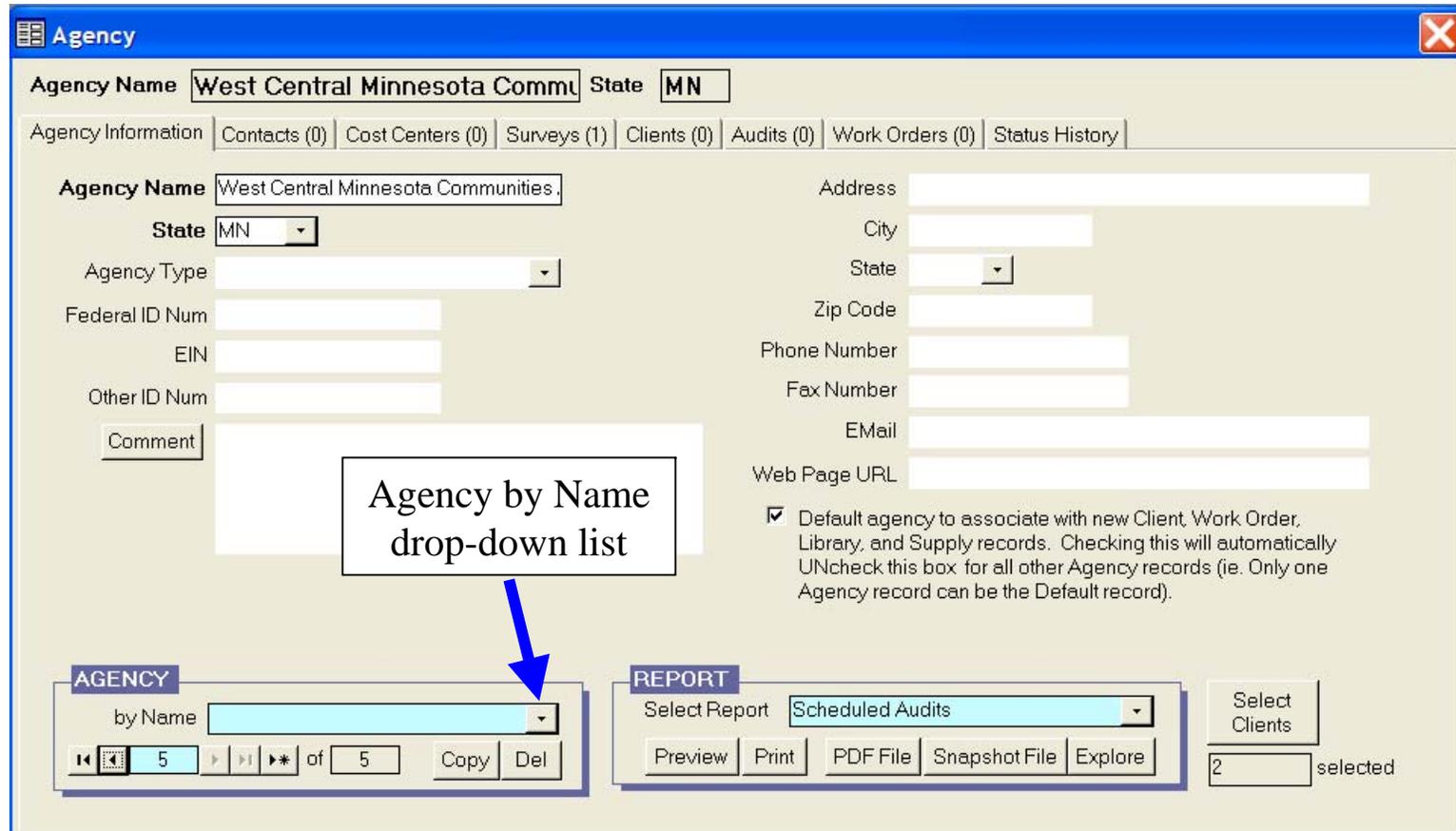
From the main screen click on the Agency button to show the Agency screen.



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.



The screenshot shows the 'Agency' screen in the NEAT software. The main form is titled 'Agency' and contains the following fields:

- Agency Name: West Central Minnesota Commu
- State: MN
- Agency Information: Contacts (0), Cost Centers (0), Surveys (1), Clients (0), Audits (0), Work Orders (0), Status History
- Agency Name: West Central Minnesota Communities
- State: MN
- Agency Type: [dropdown]
- Federal ID Num: [text box]
- EIN: [text box]
- Other ID Num: [text box]
- Comment: [text box]
- Address: [text box]
- City: [text box]
- State: [dropdown]
- Zip Code: [text box]
- Phone Number: [text box]
- Fax Number: [text box]
- Email: [text box]
- Web Page URL: [text box]
- Default agency to associate with new Client, Work Order, Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record).

A callout box with a blue arrow points to the 'Agency by Name' drop-down list in the lower left corner of the screen. The list shows 'AGENCY' and 'REPORT' sections. The 'AGENCY' section has a drop-down menu with 'by Name' and a list of 5 items. The 'REPORT' section has a 'Select Report' dropdown menu with 'Scheduled Audits' selected. There are also 'Select Clients' and '2 selected' buttons.

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.

The screenshot shows the 'Agency' setup window. At the top, the 'Agency Name' is 'West Central Minnesota Commu' and the 'State' is 'MN'. Below this, there are several tabs: 'Agency Information', 'Contacts (0)', 'Cost Centers (0)', 'Surveys (1)', 'Clients (0)', 'Audits (0)', 'Work Orders (0)', and 'Status History'. The 'Contacts (0)' tab is highlighted with a blue box and a blue arrow pointing to it. A callout box with the text 'Select Contacts tab' is positioned over the 'Contacts (0)' tab. The main form area contains fields for 'Agency Name' (West Central Minnesota Communities), 'State' (MN), 'Agency Type', 'Federal ID Num', 'EIN', 'Other ID Num', 'Address', 'City', 'State', 'Zip Code', 'Phone Number', 'Fax Number', 'Email', and 'Web Page URL'. There is also a checkbox for 'Default agency to associate with new Client, Work Order, Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record)'. At the bottom, there are two sections: 'AGENCY' with a search dropdown set to 'by Name' and a list of 5 items, and 'REPORT' with a dropdown set to 'Scheduled Audits' and buttons for 'Preview', 'Print', 'PDF File', 'Snapshot File', and 'Explore'. A 'Select Clients' button is also present, with '2' selected.

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.

The screenshot shows a web application window titled "Agency" with a close button in the top right corner. The main content area is a form for adding or editing a contact. At the top, there are input fields for "Agency Name" (containing "West Central Minnesota Comm") and "State" (containing "MN"). Below this is a navigation bar with tabs: "Agency Information", "Contacts (0)", "Cost Centers (0)", "Surveys (1)", "Clients (0)", "Audits (0)", "Work Orders (0)", and "Status History".

The form fields are organized as follows:

- Contact Name:** A text input field.
- User Name:** A text input field.
- Active:** A checked checkbox.
- Work Phone:** A text input field.
- Name Detail:** Sub-fields for "First", "MI", and "Last" names.
- Cell Phone:** A text input field.
- Company:** A text input field.
- Address:** A text input field.
- Pager:** A text input field.
- Auditor:** A checkbox.
- EIN:** A text input field.
- Unit Number:** A text input field.
- Fax:** A text input field.
- Contractor:** A checkbox.
- Title:** A text input field.
- City:** A text input field.
- Home Phone:** A text input field.
- Crew:** A checkbox.
- State:** A dropdown menu.
- Email:** A text input field.
- Supplier:** A checkbox.
- Zip Code:** A text input field.
- Web Page:** A text input field.

Below the form fields is a "Comment" text area. At the bottom left, there is a section titled "AGENCY CONTACT" with three dropdown menus: "by Contact Name", "by User Name", and "by Company". At the bottom right, there is a "Change LogOn Group and Password" button and a text input field. At the very bottom, there is a navigation bar with "Copy" and "Del" buttons, and a status indicator showing "1 of 1".

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.

The screenshot shows a software window titled "Agency" with a blue header bar. Below the header, there are input fields for "Agency Name" (containing "West Central Minnesota Commu") and "State" (containing "MN"). A tabbed interface below these fields shows "Agency Information" selected, with other tabs for "Contacts (0)", "Cost Centers (0)", "Surveys (1)", "Clients (0)", "Audits (0)", "Work Orders (0)", and "Status History".

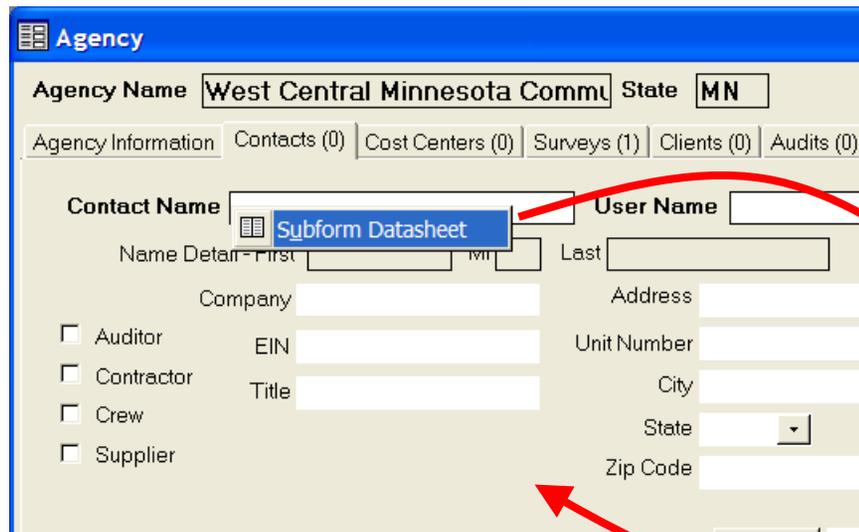
Contact Name	<User Name>	Active	Auditor	Contractor	Crew	Supplier	Company	EIN
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

At the bottom of the window, there is a record navigation bar showing "Record: 1 of 1" and a horizontal scroll bar.

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:  When the mouse cursor is moved over this toggle button, the button turns blue:  Clicking on this toggle button will switch between the form and datasheet views.



Agency Name: West Central Minnesota Comm State: MN

Agency Information | Contacts (0) | Cost Centers (0) | Surveys (1) | Clients (0) | Audits (0)

Contact Name:  User Name:

Name Detail: First Last

Company: Address:

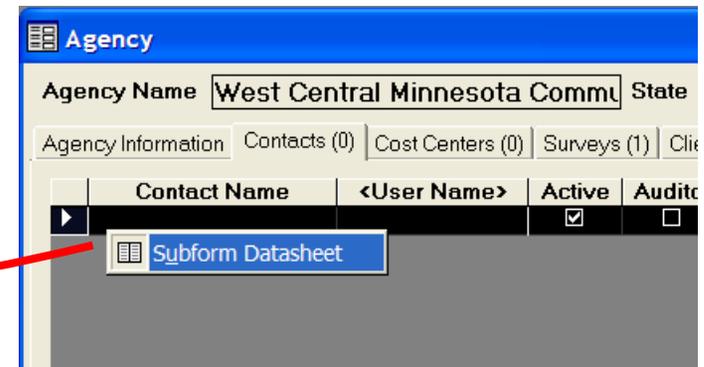
Auditor EIN: Unit Number:

Contractor Title: City:

Crew State:

Supplier Zip Code:

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



Contact Name	<User Name>	Active	Audit
		<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

The screenshot displays the 'Agency' window in the NEAT software. The window title is 'Agency' and it has a standard Windows-style title bar with a close button. The main content area is titled 'Agency Name' and contains the text 'West Central Minnesota Commu' in a text box and 'MN' in a dropdown menu for 'State'. Below this is a navigation bar with tabs: 'Agency Information', 'Contacts (0)', 'Cost Centers (0)', 'Surveys (1)', 'Clients (0)', 'Audits (0)', 'Work Orders (0)', and 'Status History'. The 'Agency Information' tab is active.

The form fields are organized as follows:

- Contact Name:** A text box.
- User Name:** A text box.
- Active:** A checked checkbox.
- Work Phone:** A text box.
- Name Detail:** Three text boxes for 'First', 'MI', and 'Last'.
- Cell Phone:** A text box.
- Company:** A text box.
- Address:** A text box.
- Pager:** A text box.
- Auditor:** An unchecked checkbox.
- EIN:** A text box.
- Unit Number:** A text box.
- Fax:** A text box.
- Contractor:** An unchecked checkbox.
- Title:** A text box.
- City:** A text box.
- Home Phone:** A text box.
- Crew:** An unchecked checkbox.
- State:** A dropdown menu.
- Email:** A text box.
- Supplier:** An unchecked checkbox.
- Zip Code:** A text box.
- Web Page:** A text box.
- Comment:** A large text area.
- Change LogOn Group and Password:** A button with a text box next to it.

At the bottom left, there is a section titled 'AGENCY CONTACT' with three dropdown menus: 'by Contact Name', 'by User Name', and 'by Company'. Below these are navigation buttons: '<<', '<', '1', '>', '>>', and '>>>', followed by 'of 1' and 'Copy' and 'Del' buttons.

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.

The screenshot shows the 'Agency' window with the following fields and options:

- Agency Name:** West Central Minnesota Commu
- State:** MN
- Navigation:** Agency Information | Contacts (0) | Cost Centers (0) | Surveys (1) | Clients (0) | Audits (0) | Work Orders (0) | Status History
- Contact Name:** [Text Field]
- User Name:** [Text Field] Active
- Work Phone:** [Text Field]
- Name Detail:** First [Text Field] MI [Text Field] Last [Text Field]
- Cell Phone:** [Text Field]
- Company:** [Text Field]
- Address:** [Text Field]
- Pager:** [Text Field]
- Auditor:** EIN [Text Field]
- Unit Number:** [Text Field]
- Fax:** [Text Field]
- Contractor:** Title [Text Field]
- City:** [Text Field]
- Home Phone:** [Text Field]
- Crew:** State [Dropdown]
- Email:** [Text Field]
- Supplier:** Zip Code [Text Field]
- Web Page:** [Text Field]
- Comment:** [Text Area]
- AGENCY CONTACT:**
 - by Contact Name [Dropdown]
 - by User Name [Dropdown]
 - by Company [Dropdown]
- Change LogOn Group and Password:** [Text Field]
- Navigation:** [Page 1 of 1] [Copy] [Del]

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.

The screenshot shows the 'Agency' user setup form. The 'Agency Name' is 'West Central Minnesota Comm' and the 'State' is 'MN'. The 'Contact Name' is 'Smith, Mary Jane' and the 'User Name' is 'MJS'. The 'Active' checkbox is checked. The 'Auditor' checkbox is also checked. The form includes fields for 'Name Detail - First', 'MI', 'Last', 'Company', 'Address', 'Unit Number', 'City', 'Title', 'Work Phone', 'Cell', 'Pager', 'Fax', and 'Web Page'. A 'Change LogOn Group and Password' button is at the bottom right. A table at the bottom shows the contact details for 'Mary Jane Smith'.

Check the Auditor flag

Check the Active flag

The name will be recognized correctly whether it is entered as "Mary Jane Smith" or "Smith, Mary Jane" in the Contact Name field.

A short User Name must be entered

AGENCY CONTACT	
by Contact Name	▼
by User Name	▼
by Company	▼

1 of 1 | Copy | Del

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.

The screenshot displays the 'Agency' contact form for 'West Central Minnesota Commu' with state 'MN'. The contact 'Smith, Mary Jane' has a 'User Name' of 'MJS' and is marked as 'Active'. A pop-up window titled 'User Group and Password (Smith, Mary Jane)' is open, showing a 'User Group' dropdown menu and a 'Change Password' section with a note: 'Note: Passwords are case sensitive'. The 'Change Password' section includes fields for 'Confirm Old Password', 'New Password', and 'Confirm New Password', along with an 'Apply New Password' button. On the main form, a 'Change LogOn Group and Password' button is highlighted with a blue arrow pointing to it from a callout box that says 'Click the “Change LogOn Group and Password” button'. Another blue arrow points from the same callout box to the 'User Group and Password' dialog, with a callout box below it stating 'Opens 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”.

User Group and Password (Smith, Mary Jane)

User Group |

Change Password

Note: Passwords are case sensitive

Confirm Old Password

New Password

Confirm New Password

Apply New Password

Select “Admin” from the User Group list

User Group and Password (Smith, Mary Jane)

User Group Admin

Change Password

Note: Passwords are case sensitive

Confirm Old Password

New Password

Confirm New Password

Apply New Password

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

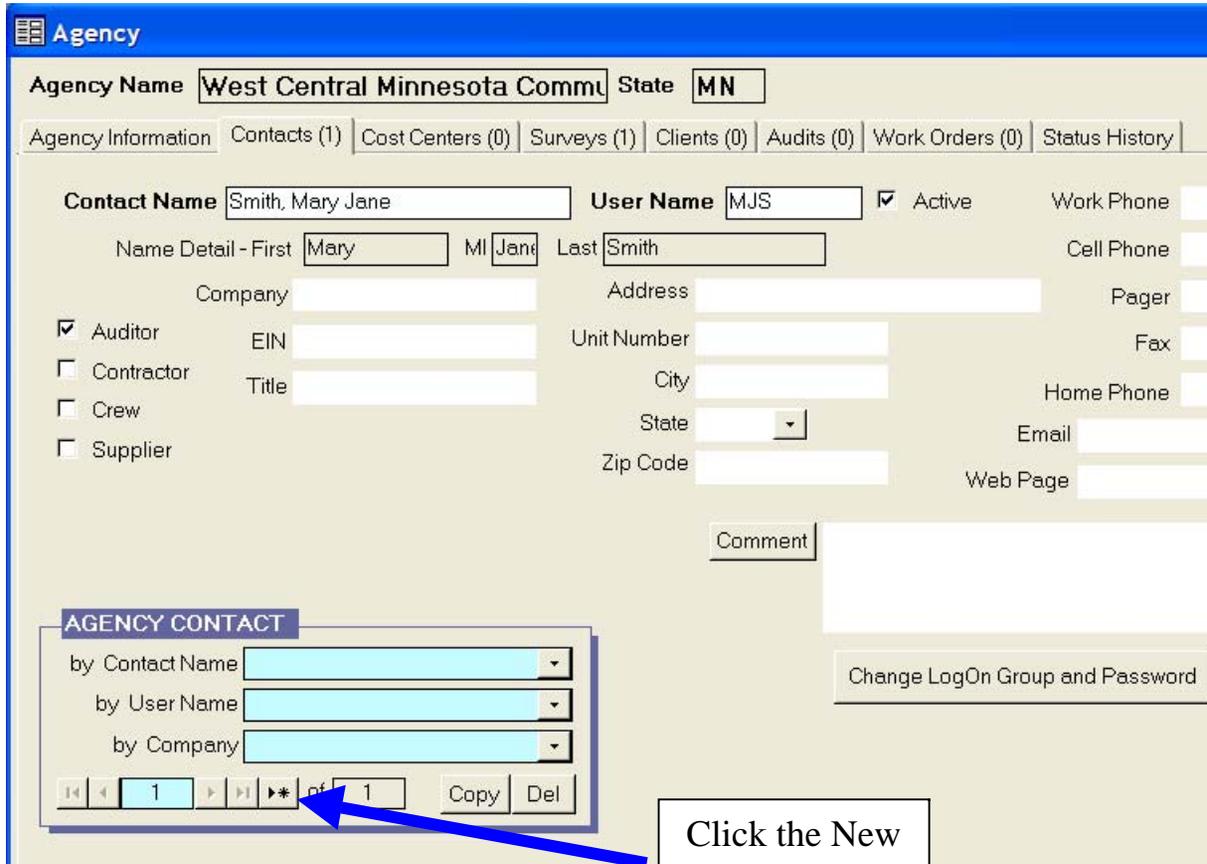
Enter the password in the New Password and Confirm New Password fields

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.



The screenshot shows the 'Agency' contact management interface. At the top, the agency name is 'West Central Minnesota Commt' and the state is 'MN'. Below this are tabs for 'Agency Information', 'Contacts (1)', 'Cost Centers (0)', 'Surveys (1)', 'Clients (0)', 'Audits (0)', 'Work Orders (0)', and 'Status History'. The main form contains fields for 'Contact Name' (Smith, Mary Jane), 'User Name' (MJS), and a checked 'Active' box. There are also fields for 'Work Phone', 'Cell Phone', 'Pager', 'Fax', 'Home Phone', and 'Email'. A 'Comment' field is at the bottom. A 'Change LogOn Group and Password' button is on the right. A blue arrow points to the 'New Blank Record' button (represented by a small icon) in the bottom navigation bar of the 'AGENCY CONTACT' window.

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.

Agency Name: West Central Minnesota Commu State: MN

Agency Information | Contacts (2) | Cost Centers (0) | Surveys (1) | Clients (0) | Audits (0) | Work Orders (0) | Status History

Contact Name: Jones, Fred User Name: FJ Active

Name Detail - First: Fred MI: Last: Jones

Company: Address: Pager:

Auditor EIN: Unit Number: Fax:

Contractor Title: City: Home Phone:

Crew State: Email:

Web Page:

Change LogOn Group and Password: D0914D96

User Group and Password (Jones, Fred)

User Group: User

Change Password

Note: Passwords are case sensitive

Confirm Old Password: New Password: Confirm New Password:

Apply New Password

“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.

The screenshot shows the 'Agency' window with the 'Agency Name' field set to 'West Central Minnesota Comm' and 'State' set to 'MN'. The 'Contacts (2)' tab is active. The 'Contact Name' field contains 'Jones, Fred' and 'User Name' is 'FJ'. The 'Active' checkbox is checked. Below the contact information are fields for 'Name Detail - First', 'MI', 'Last', 'Company', 'Address', 'City', 'State', and 'Zip Code'. There are also checkboxes for 'Auditor', 'Contractor', 'Crew', and 'Supplier'. A 'Comment' field is present. At the bottom, there is a 'Change LogOn Group and Password' button with a password field containing 'D0914D96'. A blue box highlights the 'AGENCY CONTACT' section, which includes three drop-down menus: 'by Contact Name', 'by User Name', and 'by Company'. A blue arrow points from this box to a text box labeled 'Agency Contact by Contact Name drop-down list'. Another blue arrow points from the 'Record Selector' (a navigation bar showing '1 of 2') to a text box labeled 'Record Selector'.

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.

The screenshot shows the 'Agency' window with the following details:

- Agency Name: West Central Minnesota Comm
- State: MN
- Agency Information | Contacts (2) | Cost Centers (0) | Surveys (1) | Clients (0) | Audits (0) | Work Orders (0) | Status History
- Contact Name: Jones, Fred
- User Name: FJ
- Active:
- Work Phone: [Empty]
- Name Detail - First: Fred | MI: [Empty] | Last: Jones
- Cell Phone: [Empty]
- Company: [Empty] | Address: [Empty] | Pager: [Empty]
- EIN: [Empty] | Unit Number: [Empty] | Fax: [Empty]
- Title: [Empty] | City: [Empty] | State: [Empty] | Zip Code: [Empty]
- Roles: Auditor, Contractor, Crew, Supplier (all unchecked)

An 'AGENCY CONTACT' dropdown menu is open, showing a table of contacts:

by Contact Name	User Name	Company	Active
Jones, Fred	FJ		Yes
Smith, Mary Jane	MJS		Yes

A blue arrow points from the 'Smith, Mary Jane' row to the 'Contact Name' field above. A text box explains: 'Navigate to the contact record for Mary Jane Smith by selecting her name from the drop-down list'.

At the bottom of the dropdown, there are navigation controls: 1 of 2, Copy, Del.

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.

The screenshot shows the 'Agency' window with the following details:

- Agency Name:** West Central Minnesota Commu
- State:** MN
- Navigation:** Agency Information | Contacts (2) | Cost Centers (0) | Surveys (1) | Clients (0) | Audits (0) | Work Orders (0) | Status History
- Contact Name:** Smith, Mary Jane
- User Name:** MJS
- Active:**
- Name Detail:** First: Mary, MI: Jane, Last: Smith
- Fields:** Work Phone, Cell Phone, Address, Payer, Unit Number, Fax, Title, City, Home Phone, State (dropdown), Email, Zip Code, Web Page
- Roles:** Auditor (checked), Contractor, Crew, Supplier
- Comment:** [Empty text area]
- AGENCY CONTACT:** by Contact Name (dropdown), by User Name (dropdown), by Company (dropdown)
- Buttons:** Change LogOn Group and Password (40ED6571), Copy, Del
- Page Info:** 2 of 2

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.



The screenshot shows a window titled "Weatherization Assistant Log On". It has a "User Name" dropdown menu with "MJS" selected and a "LogOn" button. Below the login fields is a table with the following data:

User Name	Full Name	Group	Agency	State
BA	Auditor, Bob	User	State of Minnesota	MN
BB	Buildingshell, Bob	User	State of Minnesota	MN
FJ	Jones, Fred	User	West Central Minnesota Com	MN
JA	Admin, Jane	Admin	State of Minnesota	MN
MJS	Smith, Mary Jane	Admin	West Central Minnesota Com	MN
MM	Mechanical, Mike	User	State of Minnesota	MN

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.

The screenshot shows the 'Agency' window in the NEAT software. The 'Agency Name' is 'State of Minnesota' and the 'State' is 'MN'. The 'Contacts (4)' tab is selected, indicated by a blue arrow and a callout box that says 'Select the Contacts tab'. Another callout box points to the 'State' dropdown menu, stating 'Navigate to the agency record for State of Minnesota by selecting from the drop-down list'. At the bottom, there are two panels: 'AGENCY' and 'REPORT'. The 'AGENCY' panel shows a list of agencies with '5' of '6' items displayed. The 'REPORT' panel shows 'Scheduled Audits' selected as the report, with '1' client selected.

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.

Agency Name State

Agency Information | Contacts (4) | Cost Centers (2) | Surveys (1) | Clients (2) | Audits (2) | Work Orders (2) | Status History

Contact Name User Name Active Work Phone

Name Detail - First MI Last Cell Phone

Company Address Pager

Auditor EIN Unit Number Fax

Contractor Title City Home Phone

Crew State Email

Supplier Zip Code Web Page

Comment

AGENCY CONTACT

by Contact Name

by User Name

by Company

1 of 4 Copy Del

Change LogOn Group and Password

Active check box is unchecked

Navigate to each of the other Contacts by selecting from the drop-down list or using the record selector

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.

Weatherization Assistant Log On

User Name: **MJS** LogOn

User Name	Full Name	Group	Agency	State
FJ	Jones, Fred	User	West Central Minnesota Comr	MN
MJS	Smith, Mary Jane	Admin	West Central Minnesota Comr	MN

Database: C:\Program Files\NEAT\Current\database\wba024x.mdb
Description: Default backend database

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.



The screenshot shows a dialog box titled "User Group and Password (Smith, Mary Jane)". It features a "User Group" dropdown menu with "User" and "Admin" as options. Below the dropdown is a "Change Password" section containing a note: "Note: Passwords are case sensitive". This section includes three text input fields: "Confirm Old Password", "New Password", and "Confirm New Password". At the bottom of the dialog is an "Apply New Password" button.

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.