HELP DOCUMENTATION FOR SIDR ADMINISTRATORS

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OVERVIEW

This document will describe the set of features/functions available to users with the SIDR Administrator role. The SIDR Administrator role must be granted by another administrator or by a system administrator. Users with other roles may also have some of the same features/functions available to them, but these roles will not be covered in this document.

MANAGE USERS

MANAGERS AND STAFF

EQD Administrators, EQD Staff members, and AD NRSS users can be added and modified using the Manage > Users > Managers and Staff page. Any NPS user who has an active AD account can be assigned a role in SIDR. Once added to the system a user cannot be deleted; this insures there are no data integrity problems with internal reviews in which that user was associated. In cases where a user no longer needs a role, the user's role can be inactivated. Inactivating a role will remove any access to additional features/functions that user had with the role they were assigned.

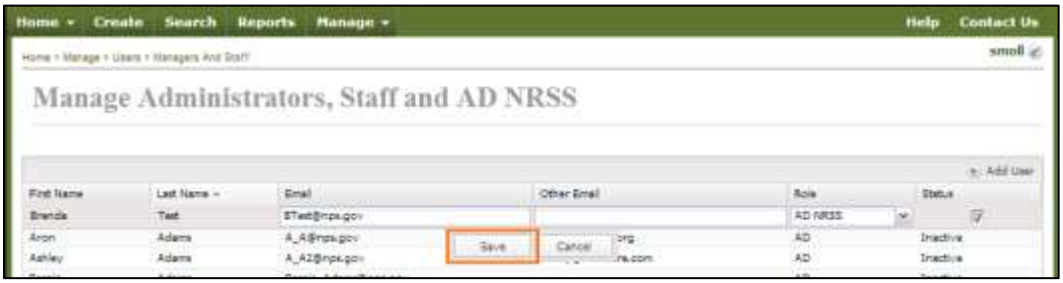
ADD A USER

To add a new user as an EQD Administrator, EQD Staff member, or AD NRSS, navigate to the Managers and Staff page from the global toolbar (Manage > Users > Managers and Staff).

On the Managers and Staff page, click the Add User button on the top of the Manage Administrators, Staff and AD NRSS table.

Begin typing the first name, last name, or email address for the user to be added. After a moment, the system will display the user(s) matching the text entered. Continue typing to narrow the results returned.

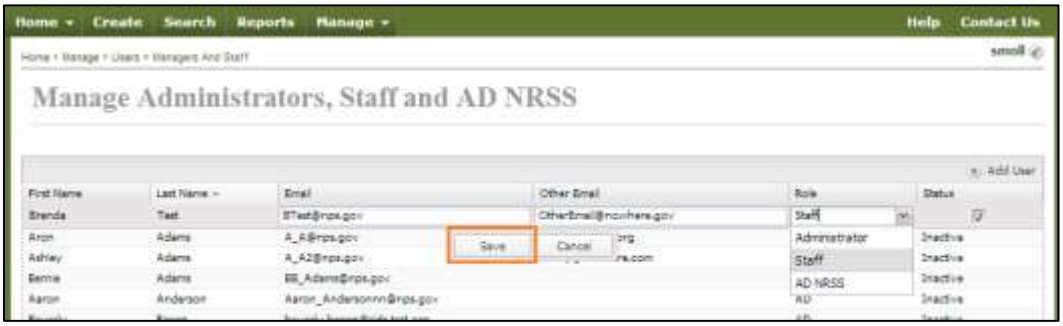
Once a user is selected, the system will display the user's information in a new row of the Manage Administrators, Staff and AD NRSS table. Complete the information, select the user's role, verify the Status is set to Active, and click Save.



MODIFY A USER

To modify a user's role or information, navigate to the Managers and Staff page (Manage > Users > Managers and Staff).

In the Manage Administrators, Staff and AD NRSS table, double click on the row to be modified to enable in-line editing.



Modify the user's role and information as needed. To inactivate a user, uncheck the Status checkbox. Click Save to commit the changes. Note: the user's UPN, First Name, and Last Name cannot be modified in this system.

MANAGE DIVISION POCS

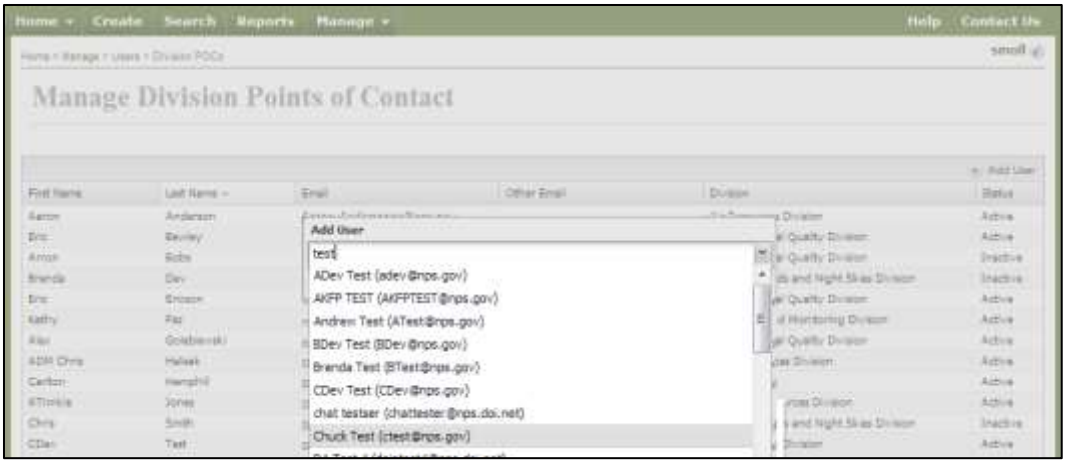
Division POCs can be added and modified using the Manage Division Points of Contact page (Manage > Users > Division POCs). Any NPS user who has an active AD account can be assigned a role the Division POC role. Once added to the system a user cannot be deleted; insuring there are no data integrity problems with internal reviews in which that user has been associated. In cases where a user no longer needs a role, the user's role can be inactivated. Inactivating a role will remove any access to additional features/functions that user had with the role they were assigned. Division POCs can be managed by Administrators and Staff.

ADD A DIVISION POC

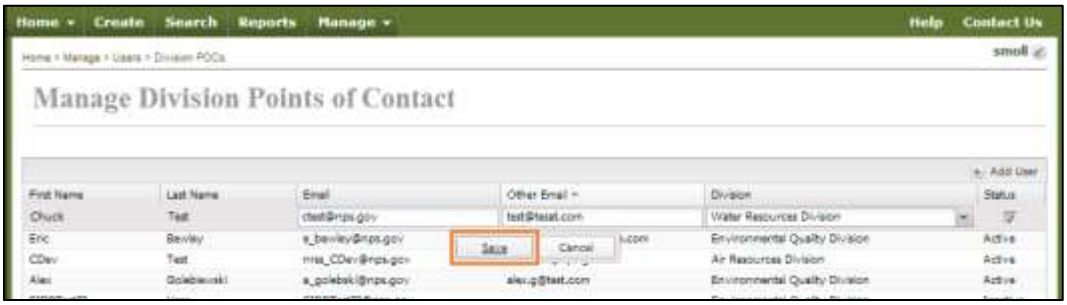
To add a new user as a Division POC, navigate to the Manage Division POCs page from the global toolbar (Manage > Users > Division POCs).

Click the Add User button on the top of the Manage Division Points of Contact table.

Begin typing the first name, last name, or email address for the user to be added. After a moment, the system will display the user matching the text entered. Continue typing to narrow the results returned. Once a user is selected, the system will insert a new row in the table to display the user's information.

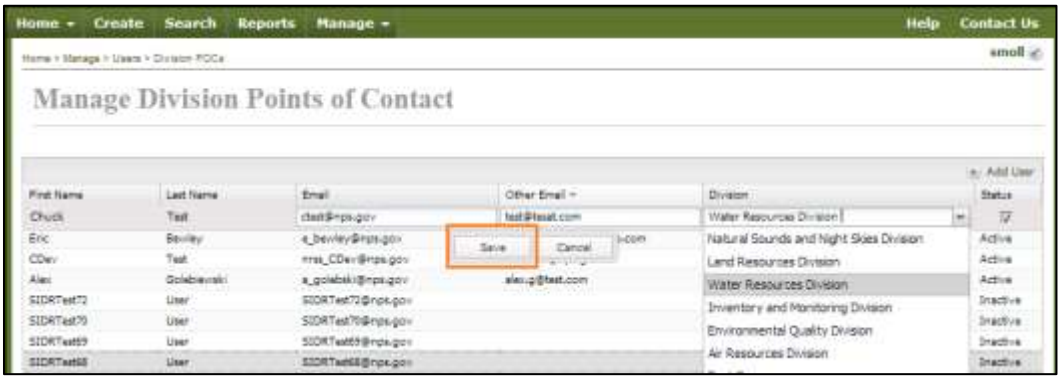


Complete the information, select a division, and click Save.



MODIFY A DIVISION POC

To modify a user's role, navigate to the Manage Division POCs page from the global toolbar (Manage > Users > Division POCs) and double click any value in the row. This will enable in-line editing of the row.



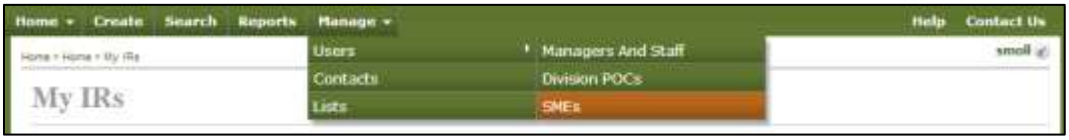
Modify the user's role and information as needed. To inactivate a user, uncheck the Status checkbox. Click Save to commit the changes. Note: the user's UPN, First Name, and Last Name cannot be modified in this system.

MANAGE SMES

Subject Matter Experts (SMEs) can be added and modified using the Manage Subject Matter Experts page (Manage > Users > SMEs). Any NPS user who has an active AD account can be assigned a role the SME role. Once added to the system a user cannot be deleted; insuring there are no data integrity problems with internal reviews in which that user has been associated. In cases where a user no longer needs a role, the user's role can be inactivated. Inactivating a role will remove any access to additional features/functions that user had with the role they were assigned. SMEs can be managed by Administrators, Staff, AD NRSS, and Division POCs.

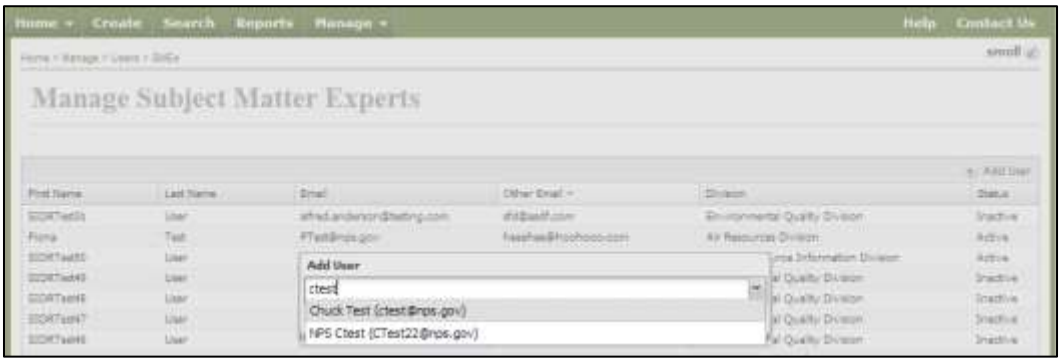
ADD A SME

To add a new user as a SME, navigate to the Manage SMEs page from the global toolbar (Manage > Users > SMEs).

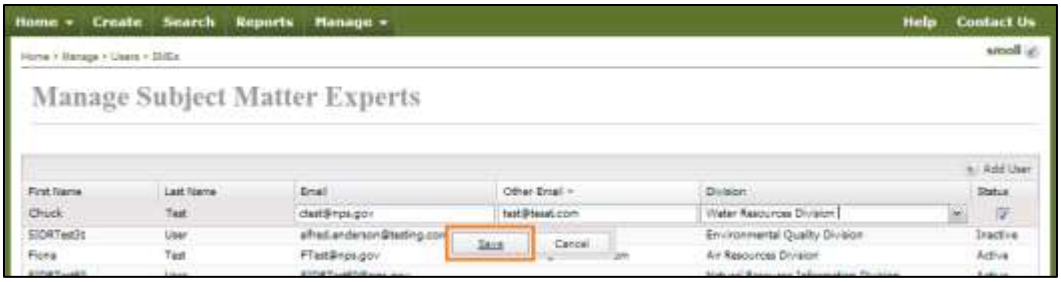


At the top of the Manage Subject Matter Experts page, click the Add User button.

Begin typing the first name, last name, or email address for the user to be added. After a moment, the system will display the user matching the text entered. Continue typing to narrow the results returned. Once a user is selected, the system will insert a new row in the table to display the user's information.

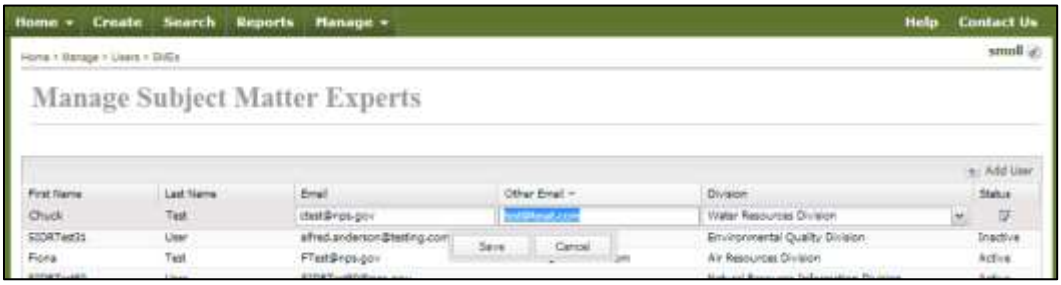


Complete the contact information if needed, select the user's Division, then click Save.



MODIFY A SME

To modify a user's role, navigate to the Manage SMEs page from the global toolbar (Manage > Users > SMEs) and double click any value in the row. This will enable in-line editing of the row.



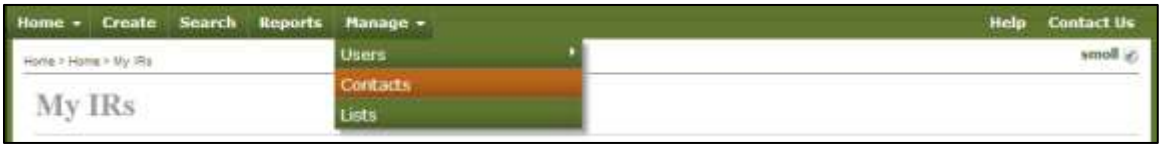
Modify the user's role and information as needed. To inactivate a user, uncheck the Status checkbox. Click Save to commit the changes. Note: the user's UPN, First Name, and Last Name cannot be modified in this system.

MANAGE CONTACTS

Contacts are used to capture the contact information of the person who will be receiving the output of the IR process known as the Response Contact. Contacts can be NPS employees or non-NPS employees since none of their information will be used outside of SIDR and no access will be granted to the individual by adding them as a contact.

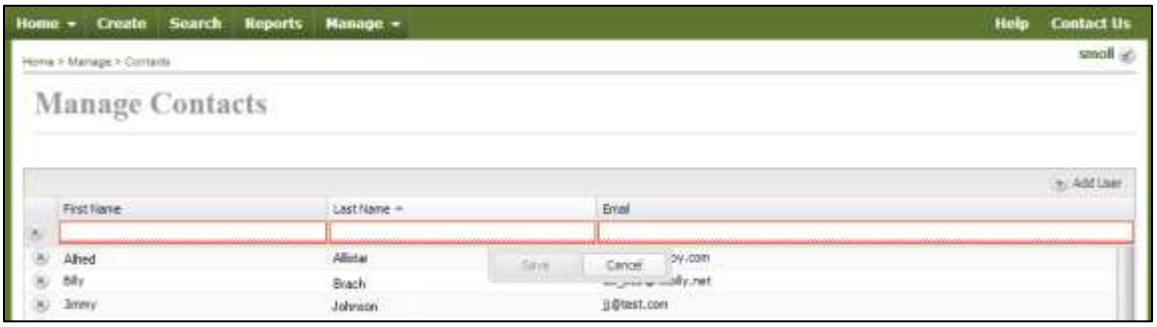
CREATE A CONTACT

Contacts can be added from the management page (Manage > Users > Contacts) or from within an Internal Review on the Routing tab. Either path provides the same input form. To add a new contact, navigate to the Manage SMEs page from the global toolbar (Manage > Contacts).



At the top of the Manage Contacts table click Add User. This will add a new row to the table.

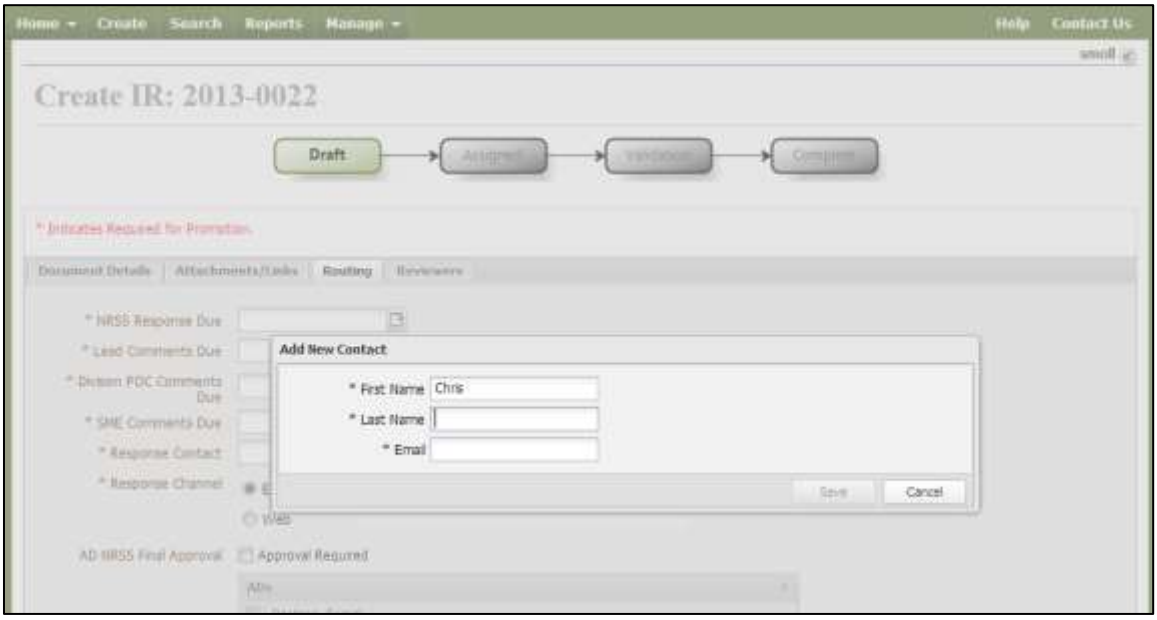
Enter the First Name, Last Name, and Email for the new contact and click Save.



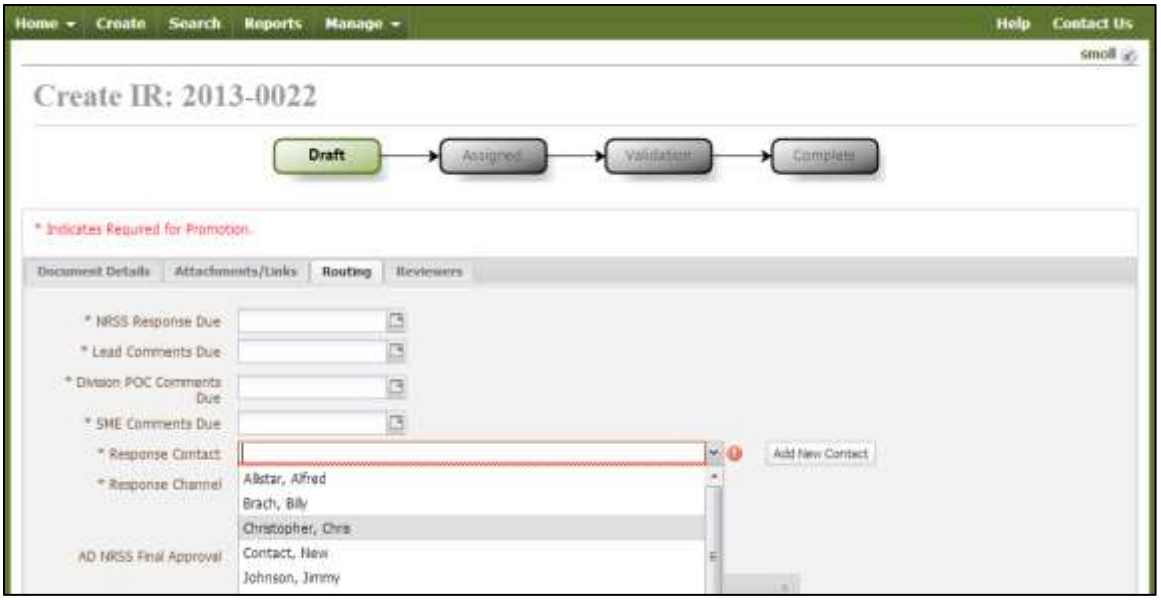
The new contact will display in the table.

Alternatively, from the Create IR or Edit IR page navigate to the Routing tab. Next to the Response Contact field, click the Add New Contact button.

In the Add New Contact popup, enter the First Name, Last Name, and Email for the new contact then click Save.



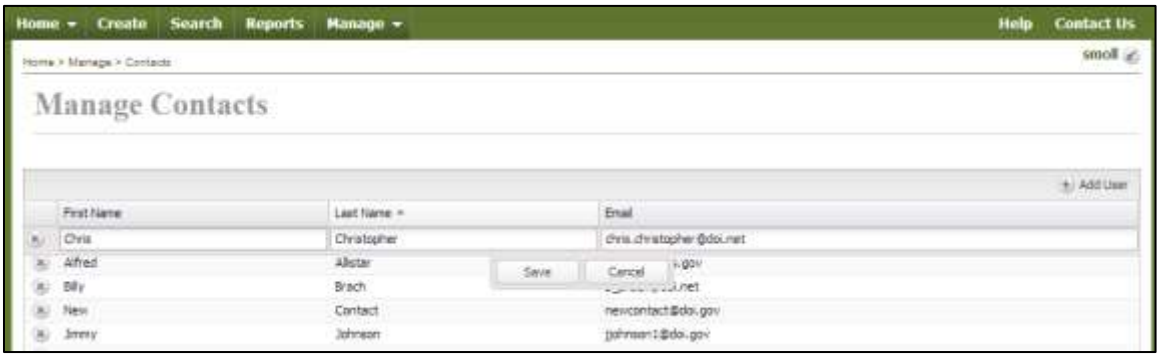
After the popup closes, click the dropdown arrow for Response Contact and select the newly created contact.



MODIFY A CONTACT

Existing contacts can be modified only on the Manage Contacts page. Modifications to the contact's First Name and Last Name will be reflected in all internal reviews with which the contact is associated. To modify an existing contact, navigate to the Manage Contacts page from the global toolbar (Manage > Contacts).

Double click on any of the values for the contact to be modified. The row will switch to in-line editing mode.



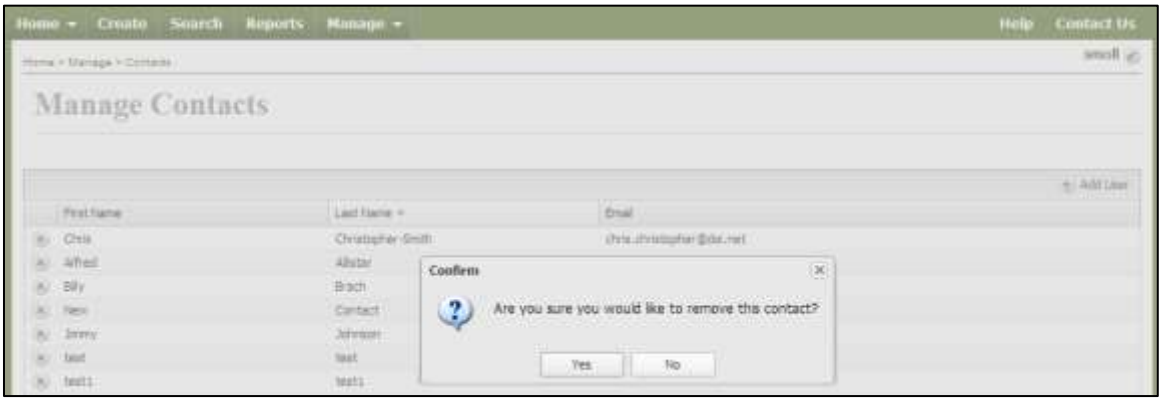
Modify the values as needed and click Save. The table will then show the updated information.

REMOVE A CONTACT

Contacts can be removed from the system via the Manage Contacts page. Removed contacts will not be displayed in Response Contact list of new Internal Reviews, but will continue to display in existing Internal Reviews where the contact is the Response Contact. To remove a contact, navigate to the Manage Contacts page from the global toolbar (Manage > Contacts).

Click the grey 'X' next to the contact to be removed.

When the system prompts for confirmation of the removal, click Yes.



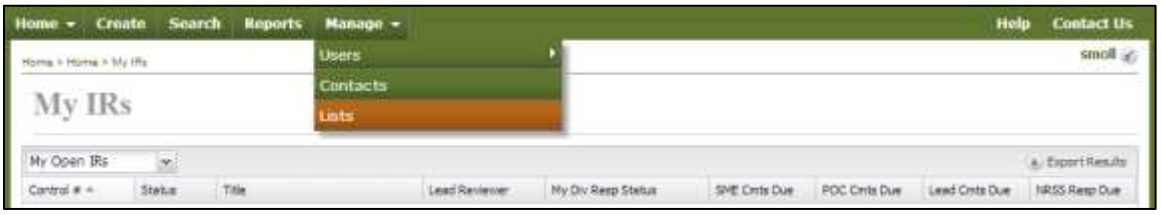
The Manage Contacts page will refresh with the contact no longer displayed.

MANAGE LISTS

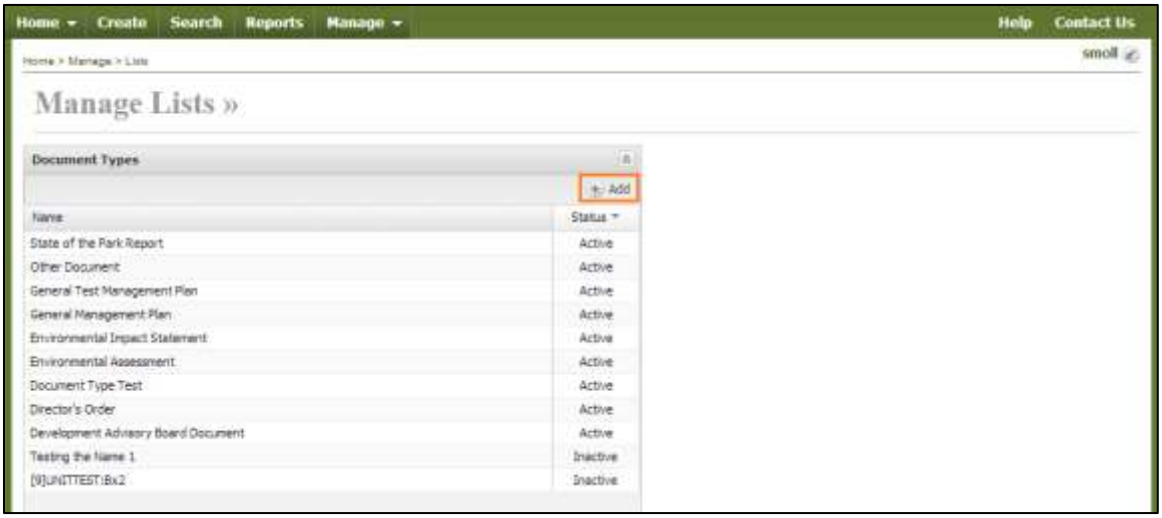
The Manage Lists page allows users to add, edit, and inactivate list items for Document Types and Attachment Types. Changes made to a list item will be reflected in all internal reviews that use that item.

ADD LIST ITEM

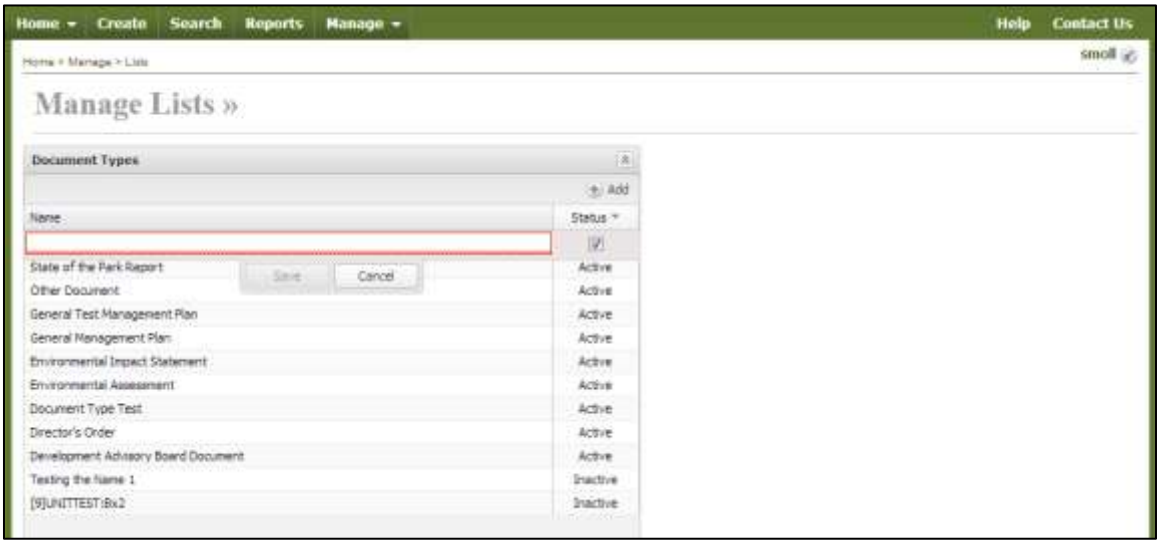
To add an item to a list, navigate to the Manage Lists page from the global toolbar (Manage > Lists).



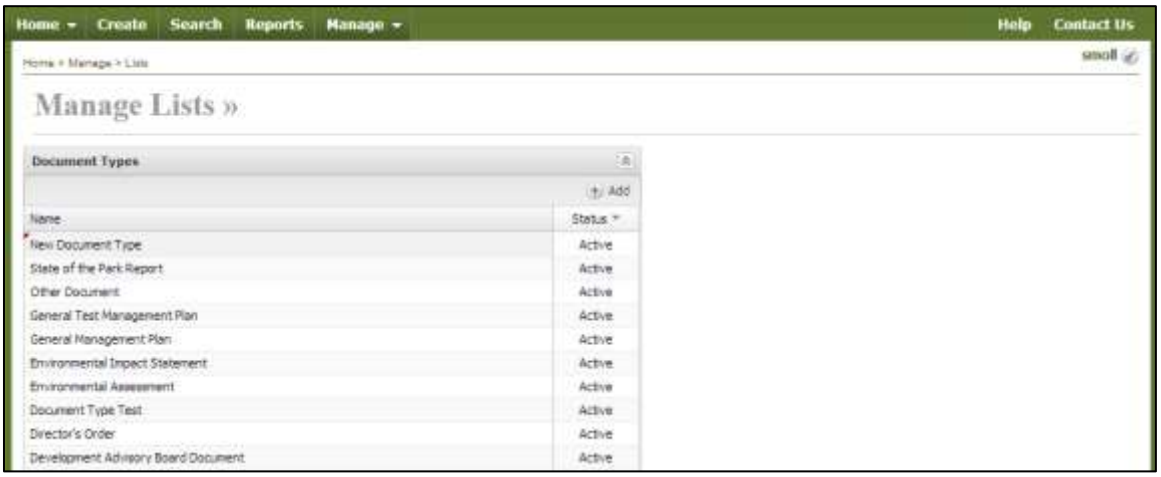
Expand the list that will be modified by clicking on the name of the list or the down arrow icon. At the top of the table, click Add.



Enter the Name and ensure the Active box is checked. Then click Save.

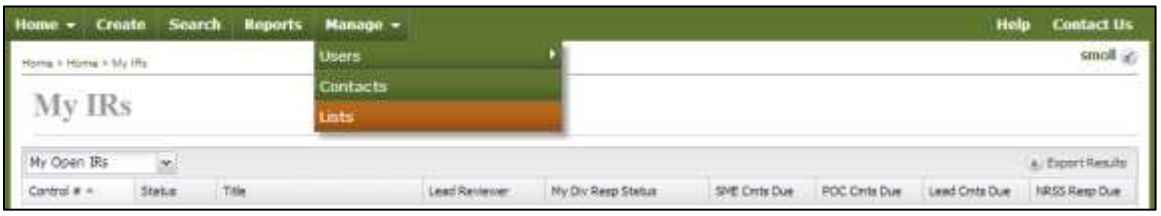


The table will refresh with the new item displayed.

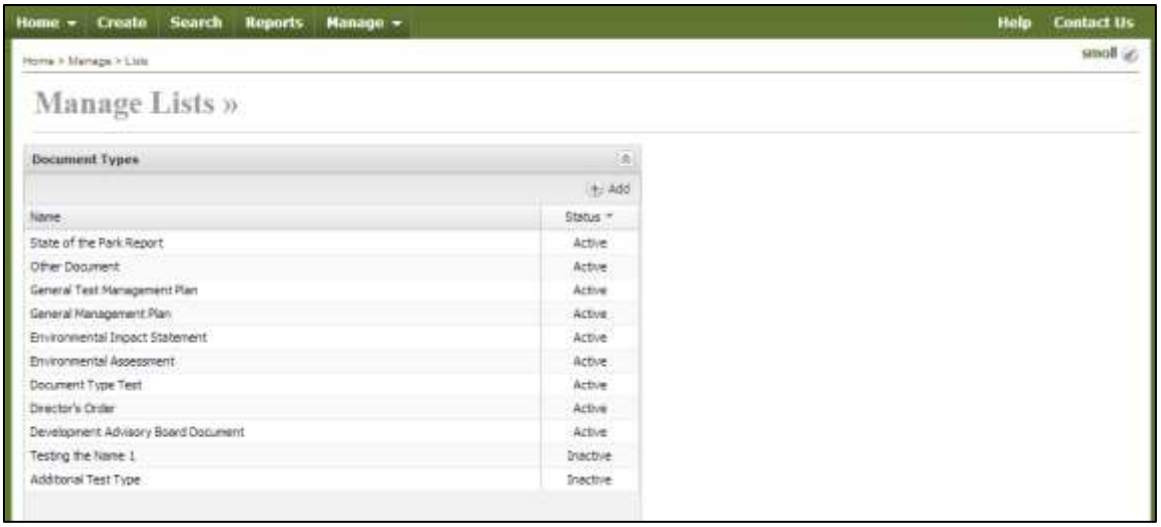


MODIFY LIST ITEM

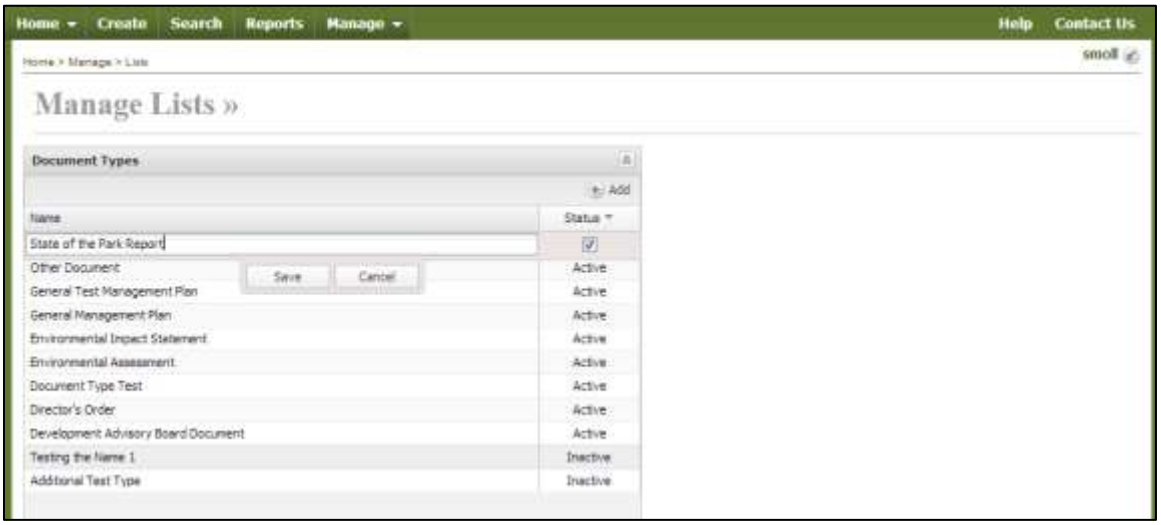
List items can be modified via the Manage Lists page. Modifying the name of a list item will affect all internal reviews that have used the item. To modify a list item, navigate to the Manage Lists page from the global menu (Manage > Lists).



Expand the list that will be modified by clicking on the name of the list or the down arrow icon. Next double click on the name of the list item being modified to enable the in-line editing of the row.

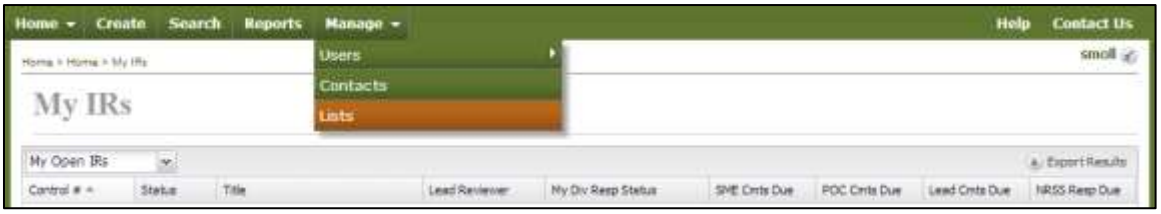


Modify the list item as needed and click Save.

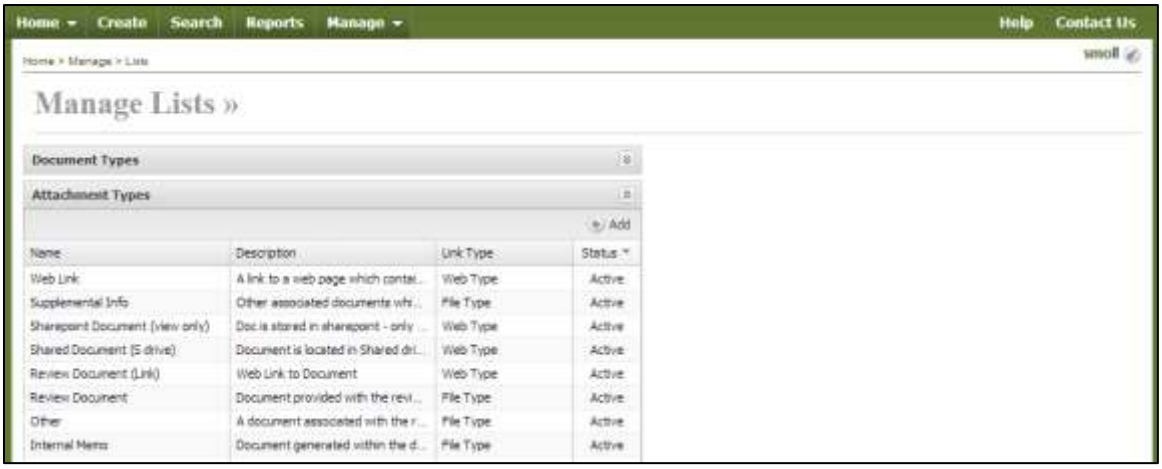


INACTIVATE LIST ITEM

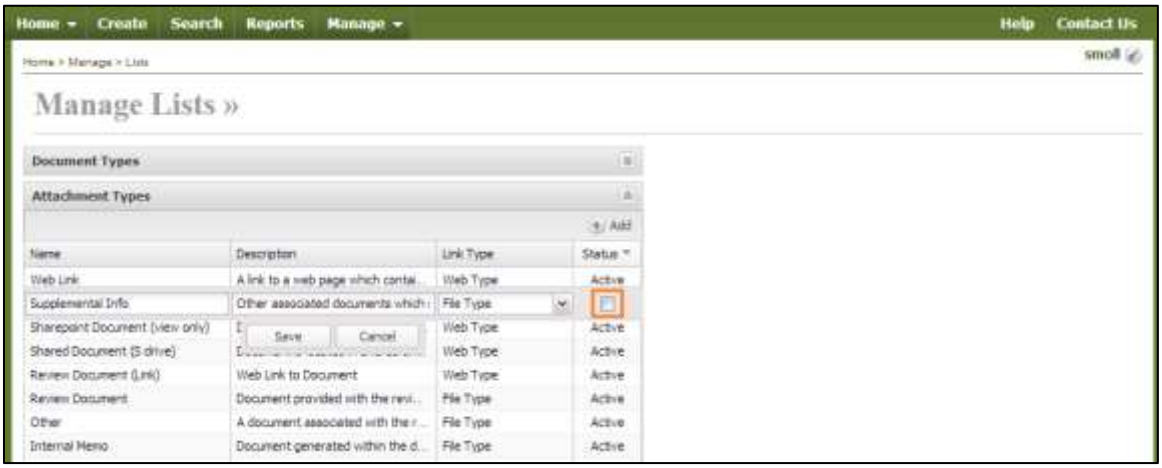
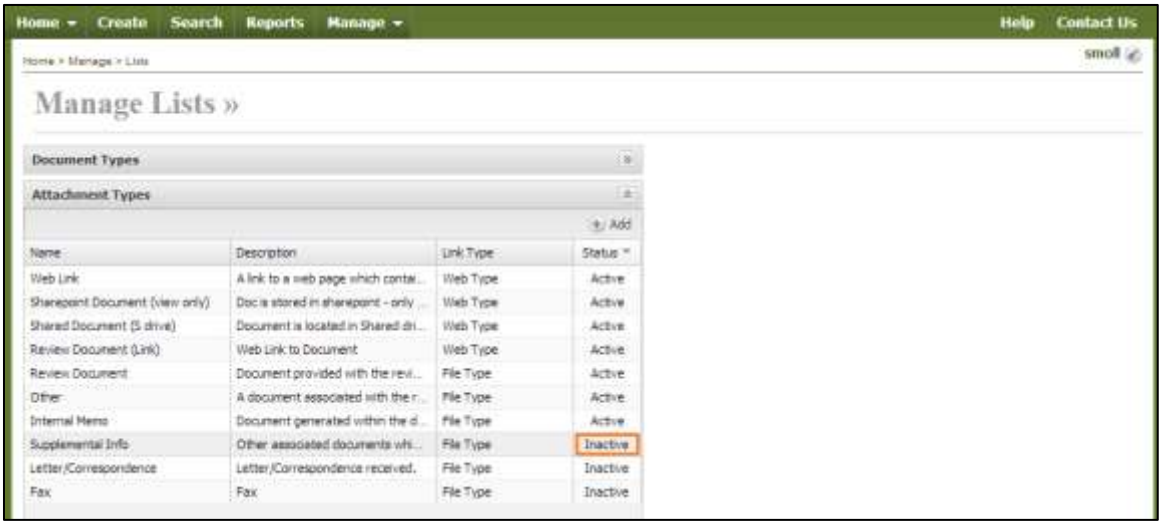
List items can be inactivated via the Manage Lists page. Inactivating a list item will prevent the item from being selected for new internal reviews, but will not affect existing internal reviews that have used the item. To inactivate a list item, navigate to the Manage Lists page from the global menu (Manage > Lists).



Expand the list that will be modified by clicking on the name of the list or the down arrow icon. Next double click on the name of the list item being inactivated to enable the in-line editing of the row.



Uncheck the Active box in the Status column to inactivate the item. Then click Save.



The list will refresh with the item in the Inactive state. Items can be re-activated by checking the Active box.