PEPC QUICK START GUIDE

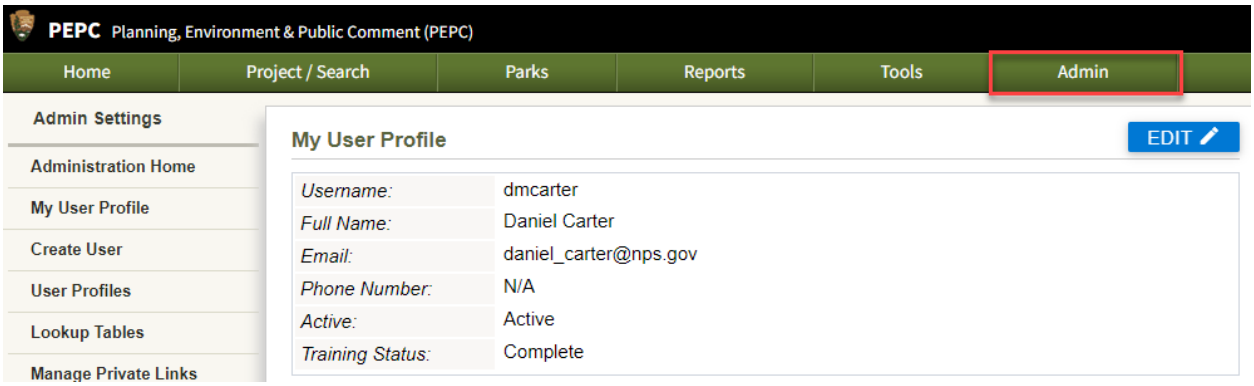
for

Park & Region Administrators

What does this Quick Start Guide Cover?

1. Setting up Park Lookup Tables – Lookup tables are used to customize particular field choices in PEPC (e.g., NEPA/NHPA specialists, IDT members, ESF Addendum questions, historical resources)
2. User Types and Roles in PEPC
3. Creating User Profiles/Assigning Roles
4. PEPC E-Mail Notifications

As a PEPC Administrator, many of the tasks you will be responsible for will be found under **Admin** in the top header navigation. This page defaults to your own profile information, including your list of parks (that appear as shortcuts on your home page) and your user roles. The links on the left navigation will provide you with the functions you need to perform your PEPC administrator tasks.



1. Setting up Park Lookup Tables

1.1: From the Admin page, click on Lookup Tables on the left navigation.

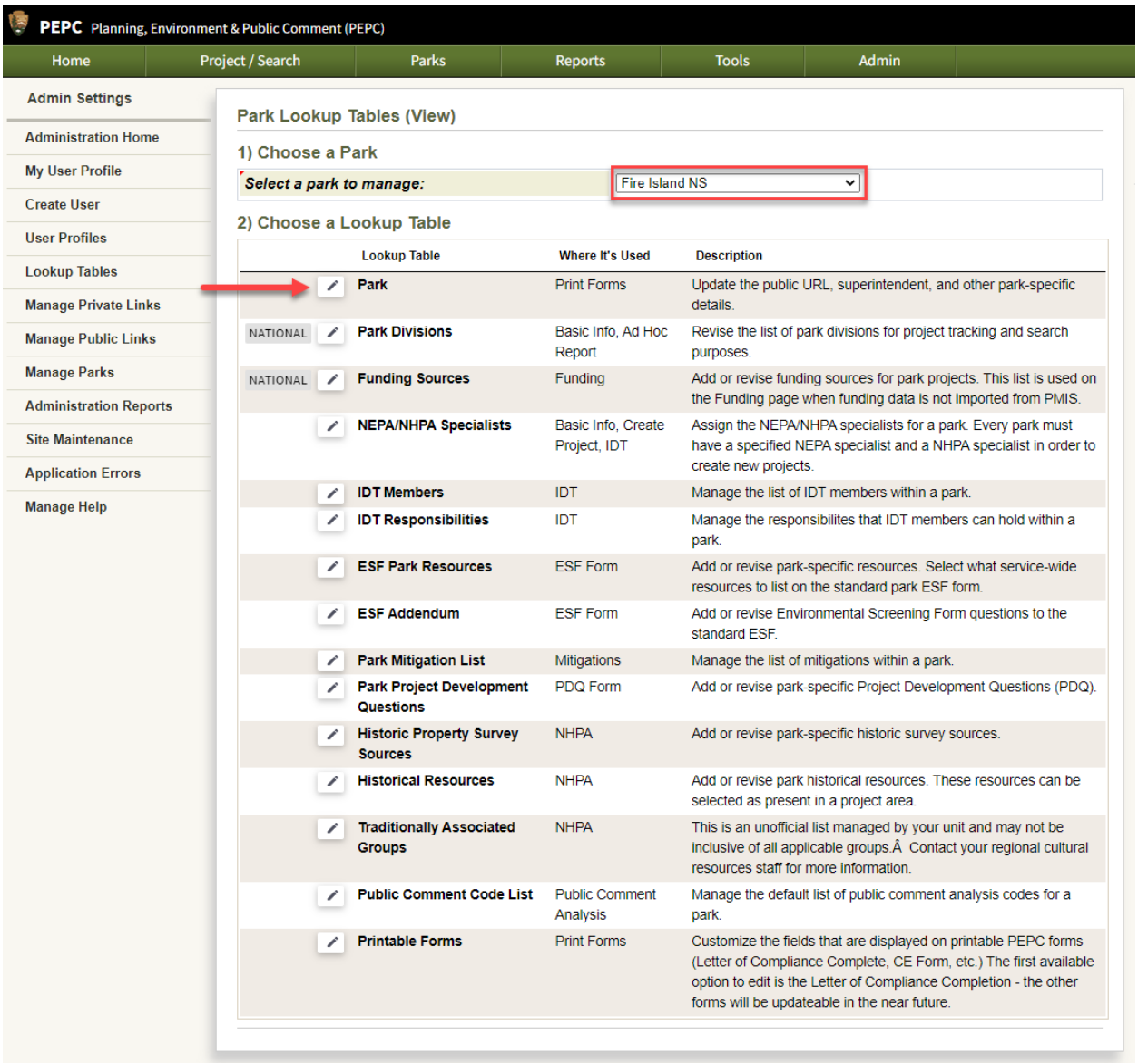


Lookup tables are used to populate or customize the dropdown lists throughout PEPC. Desired park-specific values must be added to the system before users can use them. Lookup tables provide consistent field choices that are often used across each of the park's projects, eliminating the need for manual entry. Below provides the PEPC fields that have lookup tables or can be customized by park.

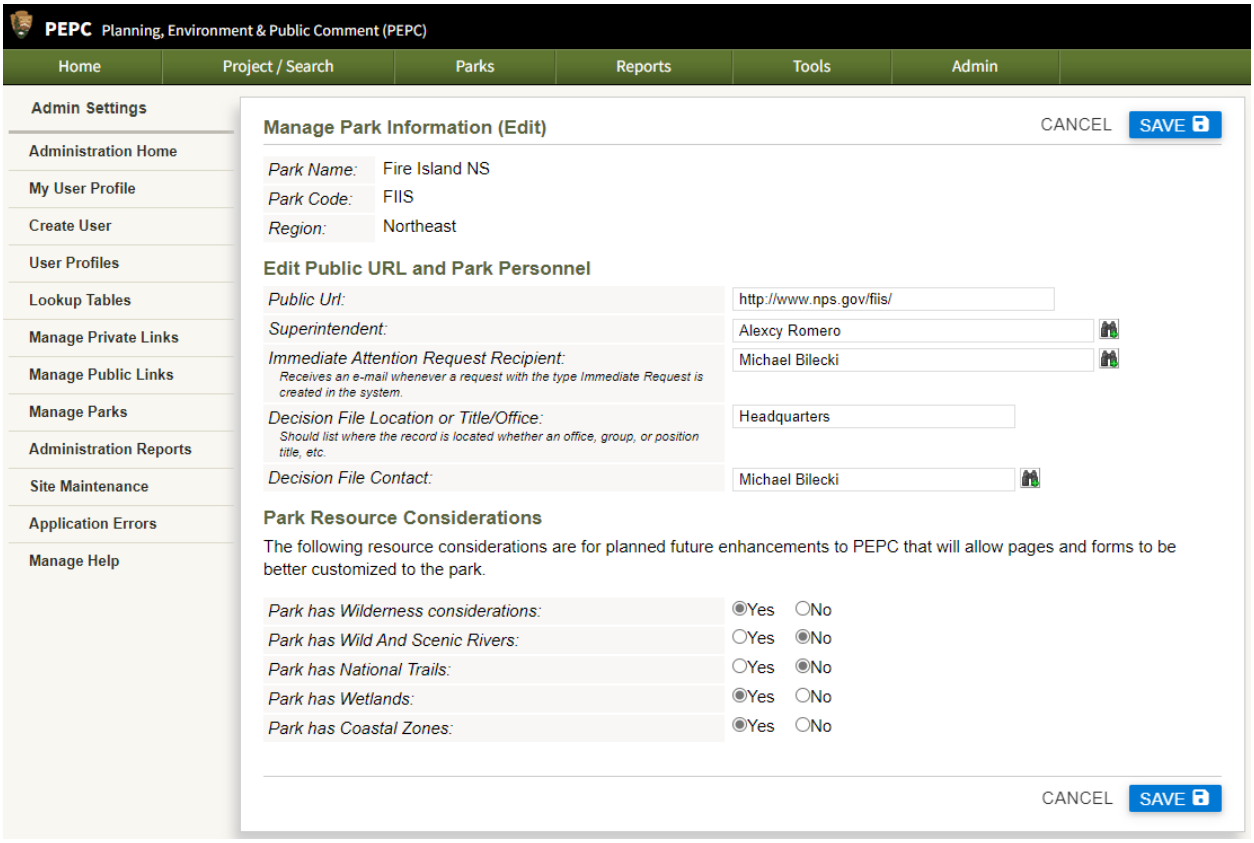
Two of these lookup tables, NEPA/NHPA Specialists and Park, are required to be filled in by the park's Administrator, as they must be populated before a project can be created for the park.

The remaining lookup tables, which are not required, already contain national data but can be augmented with park-specific data. Projects can use data from the national list **(or un-check data from the national list to de-activate)**, or select the park-specific data if it has been entered into the park's lookup table.

1.2 To enter park-specific information into a lookup table, **select your park** from the pull-down list for the table you would like to customize. Click the pencil "edit" icon.



1.3 Enter your park-specific information. Make sure to keep your Superintendent current, as this is printed on many of the forms which require signature!



1.4 Save your work. You will then see the park-specific information you just entered as a choice for each project you create in PEPC under the appropriate page and field, as explained in the table above.

2. User Types and Roles in PEPC

Each user account is associated with a user type and roles. Within each user type, there are different roles which determine what project information the user can view and edit, as summarized below.

Table 3: PEPC User Types and Roles

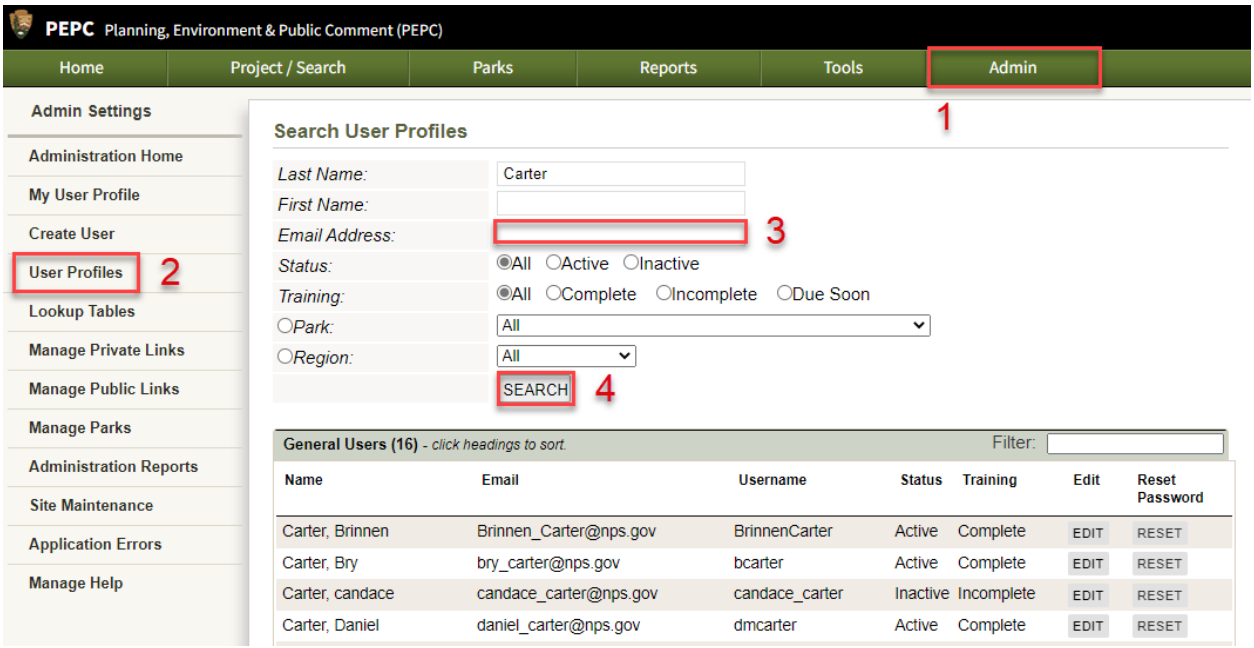
USER TYPES AND ROLES	READ ACCESS TO ANY PROJECT	WRITE ACCESS TO INTERNAL DOCUMENT REVIEWS (STEP 5)	WRITE ACCESS TO ALL PARK PROJECTS (except posting to public in Step 6)	POST Information to the Public (Step 6)	READ ACCESS TO SINGLE PROJECT EXCEPT FOR FUNDING	WRITE ACCESS TO SINGLE PROJECT EXCEPT FOR FUNDING	CAN EDIT OWN PROFILE info and change password	CAN EDIT PARK USER'S PROFILES Create User, Assign Roles, Reset Passwords
Read Only (All Projects)	X						X	
PEPC Park Administrator	X	X	X	X			X	X
Park Public Info User	X	X	X	X			X	
Park General User	X	X	X				X	
Park Document Reviewer	X	X					X	
PEPC Region Administrator	X	X	X	X			X	X
Region Public Info User	X	X	X	X			X	
Region General User	X	X	X				X	
Region Document Reviewer	X	X					X	
Single Project - Read Only					X		X	
Single Project - Edit					X	X	X	

Every user of the PEPC system will have a **user profile**, created by a PEPC Administrator. The user profile contains a username and password that will be used to provide secure access to the system. The first time a user logs in to the PEPC system, the user should change the default password created by the PEPC Administrator to something they will easily remember.

You will assign users roles as part of their user profile. Different roles allow varying access to system functionality as shown above. (For a full explanation of PEPC system roles, please see the *Appendix D: Roles and Permissions* of the *PEPC Guide,* available from Tools in the top PEPC header navigation).

3. Creating User Profiles/Assigning Roles

3.1: Before creating a new user account, check to see if the user is already in the system. (For example, if the user is transferring from another park, they may already be set up as a system user). You may only need to add your park's roles. To see if a user account exists:

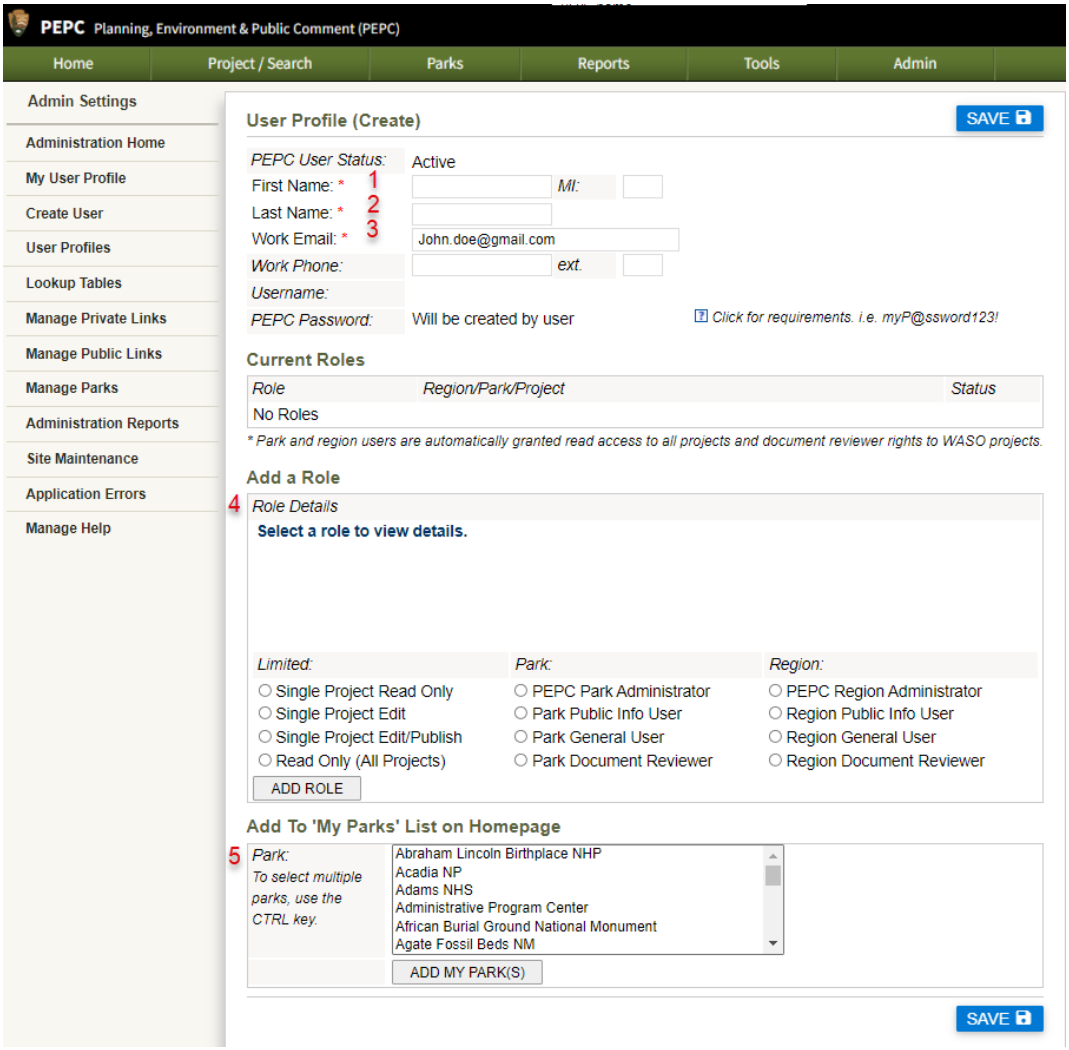


1. Click on **Admin**
2. Click on **User Profiles** in the left navigation
3. Enter the person's e-mail address
4. Click **Search**.

If the user already exists, then you can just **edit** their roles, following the instructions below.
You may want to contact the user's previous park's PEPC Administrator if their old roles have not been removed.

3.2: If the person does <u>not</u> show in your user profile search, you will need to **create a new profile**. From Admin, click on **Create User** in the left navigation.

3.3 To create the user profile, enter the following (numbers correspond to specific steps on the next page):



1) See if the person is already in the **address book** by clicking the binocular icon and doing a search. If the user is already in the address book, select their name. You will still need to create a profile for them (assuming you searched for their profile already as explained in Step 1 above and did not find their name). A person can be in the PEPC address book but not have a user profile/account. If the user does not exist in the address book,

   a) Use proper case for entering the user's first and last name.

   b) **Enter the correct e-mail address!** If not, the user will not receive their login information or automatic e-mails generated throughout projects.

   c) Enter the user's phone number. (not required)

d) Click **Add Person** and their name will appear on the profile page.

2) Enter a username. **The username should be the "name portion" of the person's e-mail address** and be entered in **lowercase.** For example

First Name: Daniel Middle Initial: M Last Name: Carter

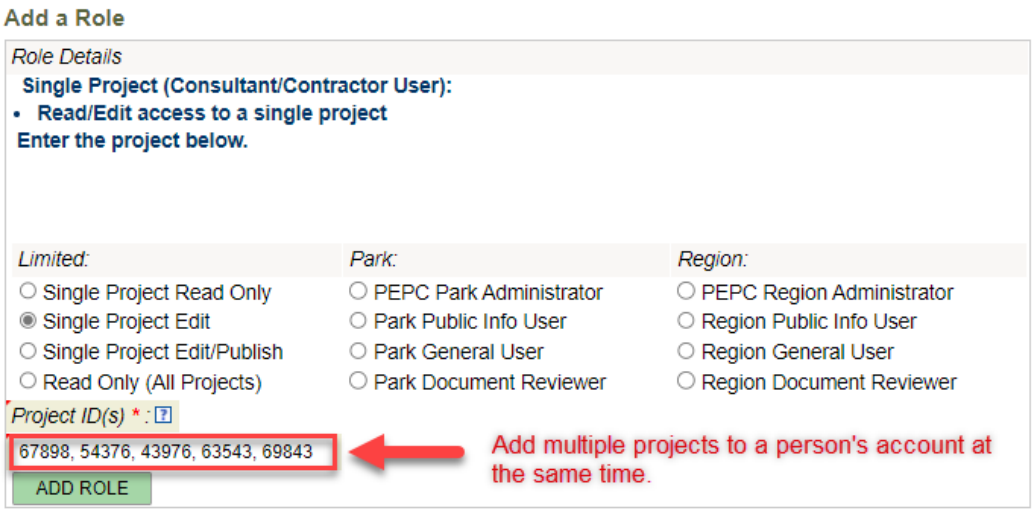
E-mail address: daniel_carter@nps.gov

username: dmcarter

3) PEPC will create and email a password to the new user. Once a user is created, they will receive a system generated e-mail letting them know their username and password, and a note to change their password upon login.

4) **Assign user roles** as fits the need. If the user will be working on a particular project as well as reviewing other park internal documents, they will need the Park General User role. (Each role level includes all lower role rights as shown in Table 3. e.g., a Park Administrator does not also need the Park General user role.) If they are only to be given rights to review documents, then they should receive either the Park Document Reviewer role or the Region Document Reviewer. Pay special attention when assigning contractors or outside agencies access! Contractors should be assigned a Limited role. Limited roles provide access to only the projects they are currently working on. Multiple projects may be added to an account by separating project IDs using commas as shown in the example below. If you have questions, contact your Regional PEPC Administrator.

Click "Add Role" after selecting the role and corresponding region, park, or project ID to add the role to the user's role list, and then click **SAVE!**



5) You can help the user by selecting their park to appear on their **My Parks** list on their PEPC home page. Click "Add My Park(s)" after selecting the park from the dropdown list.

4. Removing Roles/User Access Review

1) Please see the PEPC Annual User Access Review Instructions

5. PEPC E-Mail Notifications

The PEPC system will automatically send e-mail as the result of certain user interactions with the system. System-generated e-mails are identified in the table below by

Trigger - the action that causes the e-mail to be sent,

Sent To – the person who will receive the e-mail,

When – the delay, if any, between the trigger and the date the e-mail is sent, and

Where – the area within PEPC where this trigger can be found.

Trigger	Sent To	When	Where
Create User	Newly Created User	Immediately	Admin
Add Role	User to whom the role was given	Immediately	Admin
Reset Password	User whose password was reset	Immediately	Admin
Create Project	Project Leader, NEPA and NHPA specialist assigned to the project	Immediately	Step 1 - Project Setup
Project Description/Title Change	Project Leader, NEPA and NHPA Specialists	User can choose to send an email if the change is more than a minor edit	Step 1 -Project Setup
Target Dates are not met - not currently used	Project Leader	On target date - Message will be sent weekly!	Step 1 - Project Setup / Milestones
Adding an IDT member	IDT member	When assigned to the IDT	Step 3 - IDT
Assigning a task to an IDT member	IDT member	When a task is assigned	Step 3 - Tasks
Task due date has passed	Taskee	Once, when a task due date passes	Step 3 - Tasks
Task is completed	Project Leader, NEPA and NHPA Specialists	When a task completion date is entered	Step 3 - Tasks
Scheduling a site visit or internal meeting	IDT member	User can choose to send an e-mail	Step 3 - IDT
Cancelling a site visit or internal meeting	IDT member	Immediately	Step 3 - IDT
45 days after ROD NOA Published Date	Project Leader	45 days	Step 4 Natural-Cultural Compliance
Document Open for Review	IDT Team	A user can choose to send an e-mail	Step 5 - Document
Create Request, Immediate Attention type	Immediate Attention Request Recipient	Immediately	Step 7 -Document & Comment Analysis
Send email to IDT members for response collaboration	IDT Team	A user can choose to send an e-mail	Step 7 - Response
Close project	Project Leader, NEPA and NHPA Specialists	Immediately	Step 1 Project Setup / Milestones (coming soon) or Step 8 – Close Project