

Chapter 6: System Administration

Section 1: User Maintenance

Lesson: Special User - Maintain User IDs & Passwords

Objectives:

Upon completion of this lesson the user will be able to:

- assign and maintain security roles for each user;
- reset or change passwords assigned to their users;
- format User IDs to an identified standard; and
- assign staff a security role.

Overview:

Maintaining the security and confidentiality of the client information stored in TWIST is critical. One way to do this is by assigning unique User IDs and passwords with appropriate security roles to each staff person in WIC. This is the section of TWIST where you will assign specific roles for each staff member. The roles assigned to each staff member will have specific accesses associated with them within the TWIST system. Since you are logged in as the Local Agency currently, the only available roles you will see and/or assign, will be those available to the local agencies.

Within the “**User**” window, you can create a new user, remove a user and edit the information of an existing user, including the password. The User ID is the “name” you will use to log on to TWIST. Your local system administrator, who will receive their User ID and password from the state WIC office, normally assigns your User ID. The system administrator will assign your initial password. You can then change your password to a unique word or combination of letters and numbers known only you and the system administrator.

The “**Roles**” are a set of functions routinely performed by a group of specific users. TWIST allows the system administrator to assign appropriate security roles based on staff functions in the local agency. Some examples of roles are one that allows “view only” access and another that allows that person to edit and update local agency base tables. You can assign a user to one or more roles and/or remove a user from his roles

Let's start assigning roles!

Instruction:**Accessing the “Security” Screen**

From the “Select Modules” screen, click on the “Security” tab, and then click on “Security Control” icon.

Only the WIC Coordinator and the designated System Administrator will have access to this area in Family Net.

From the “Maintain” menu select “User.”

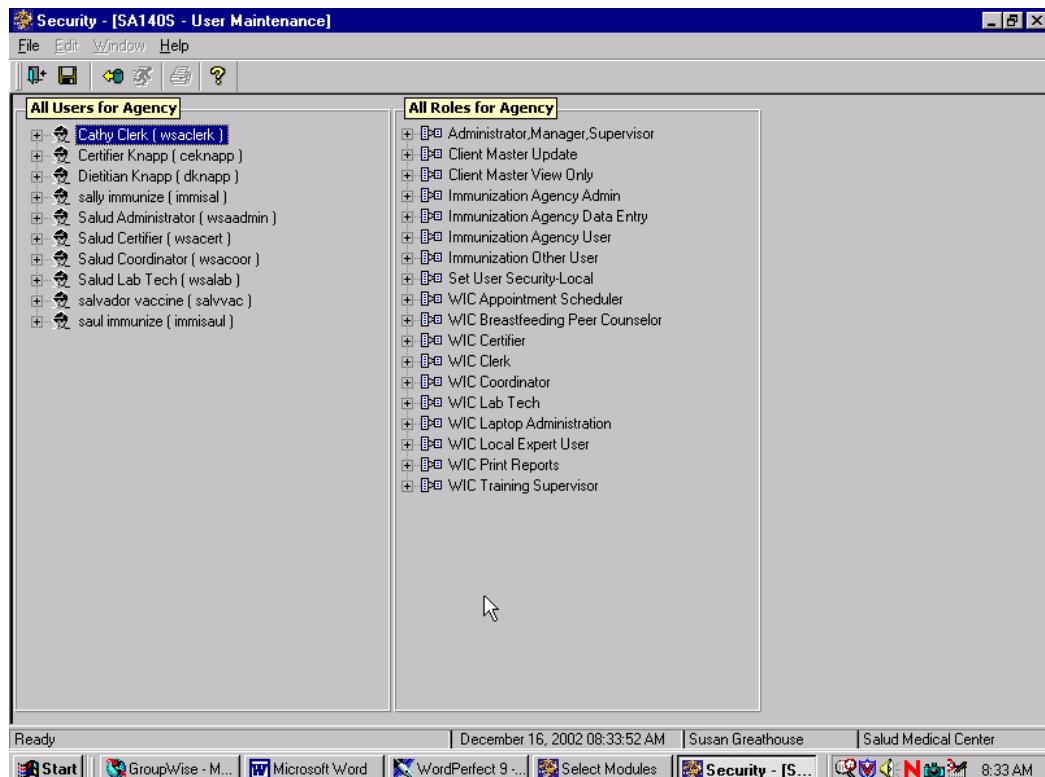


Figure 1: “Security - User Maintenance” Screen

- 1.1 This will open a two-column window. One side will display all the **“Users”** for this particular agency, listed by both their assigned name and their User ID.
- 1.2 The other side is a list of all the available **“Roles.”** These are more fully explained in the *Local Agency Security Roles* document in the Appendix. These are state defined and maintained.

Adding a User

1. **To add a “User,” position the cursor anywhere on the user side of the screen. Right click (with your mouse) to display a choice of four actions:**

- Insert User
- Remove User
- Edit User
- Edit User Roles

2. **Select “Insert User.”**

This will activate a new pop-up window and allow you to enter the new user’s information.

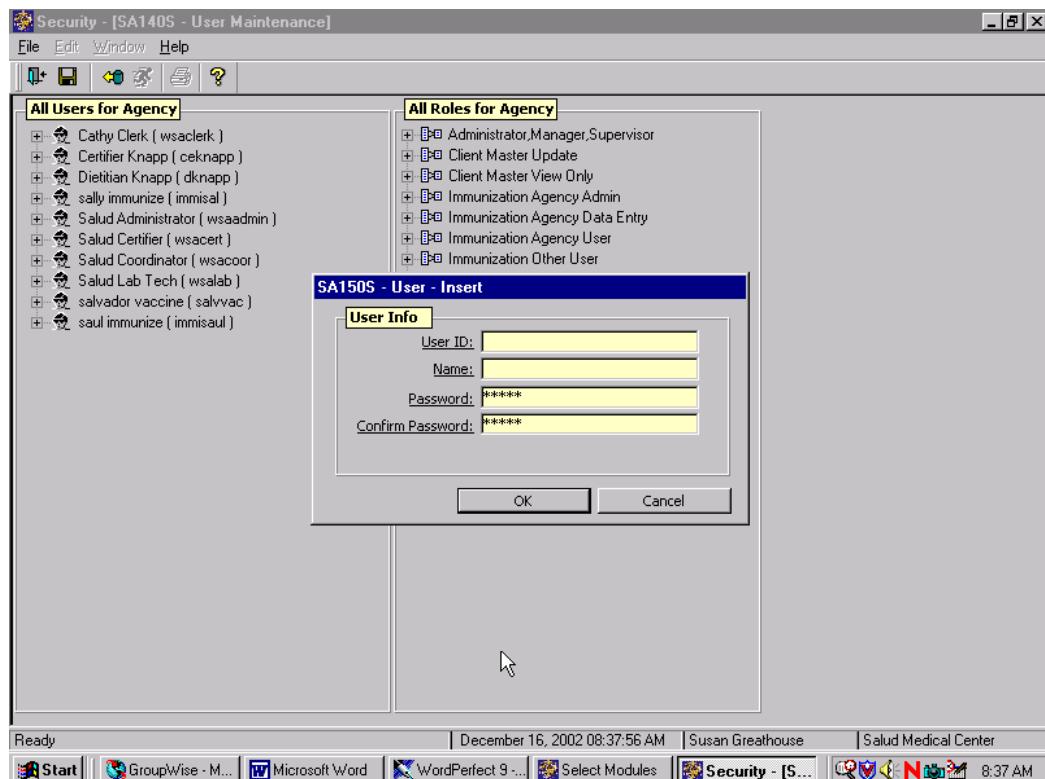


Figure 2: “Insert User” Pop-Up

3. **Type in a User ID in the “User ID” field.**

This should be the staff person’s logon ID in your local agency.

4. **Type their full name in the “Name” field.**

This is how their User name will appear in the User list.

5. **Type in a User password.**

- The password must contain 6 or more alphanumeric characters and must begin with an alpha character.
- As Coordinator or System Administrator, you may want to always assign the same password to you all of your staff, and then have them change it the first time they log-in. For example, you could use the same 6-letter password “healthy” for all new users and to reset passwords.
- You must retype the password in the “**Confirm Password**” field.

6. **Click “OK.”**

This will bring you back to the “**Security - User Maintenance**” screen.

Removing a User

1. **To remove a “User,” position the cursor on the staff name you are removing. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**

2. **Select “Edit User Roles.”**

User roles need to be deleted prior to removing the user.

3. **Click “Clear All”, and then Click “OK.”**

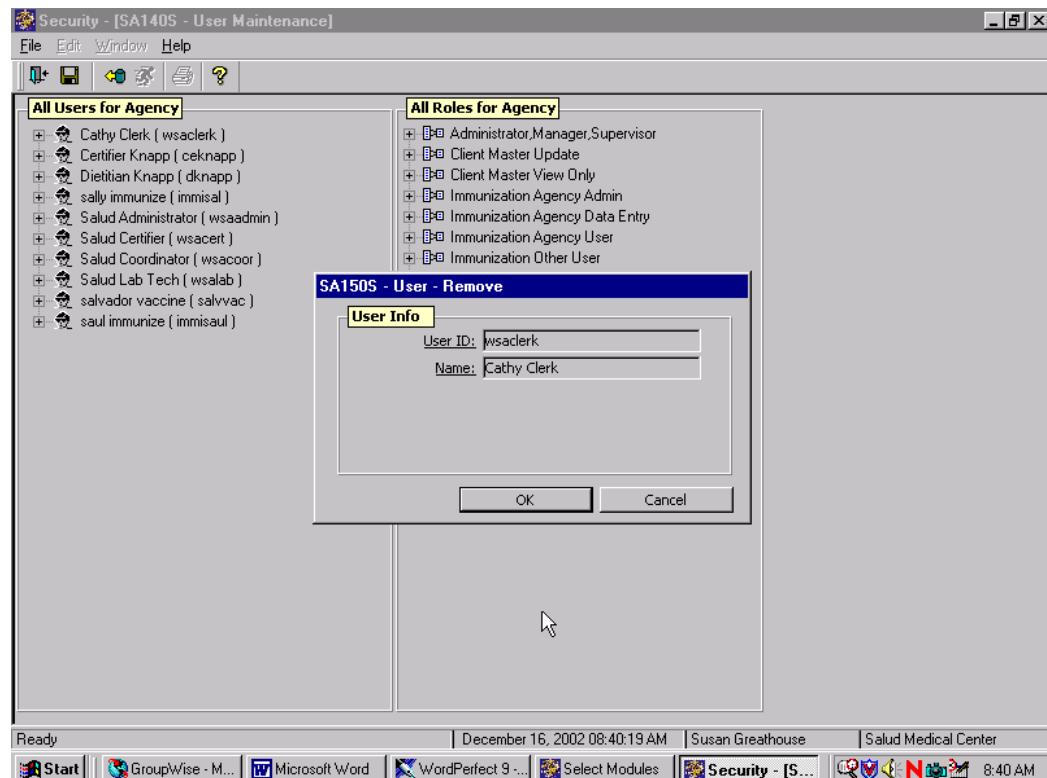


Figure 3: “Remove User” Pop-Up

4. **Right Click on the user name. Select “Remove User.”**
5. **Verify the User name as shown.**
6. **Click “OK”**

Once you select “OK,” you will remove this User from the List of Users. This will bring you back to the “Security - User Maintenance” screen.

Editing an Existing User

1. **To edit a “User,” position the cursor on the user name to be edited. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**
2. **Select “Edit User.”**

This will activate a new pop-up window and will allow you to edit the selected user information.

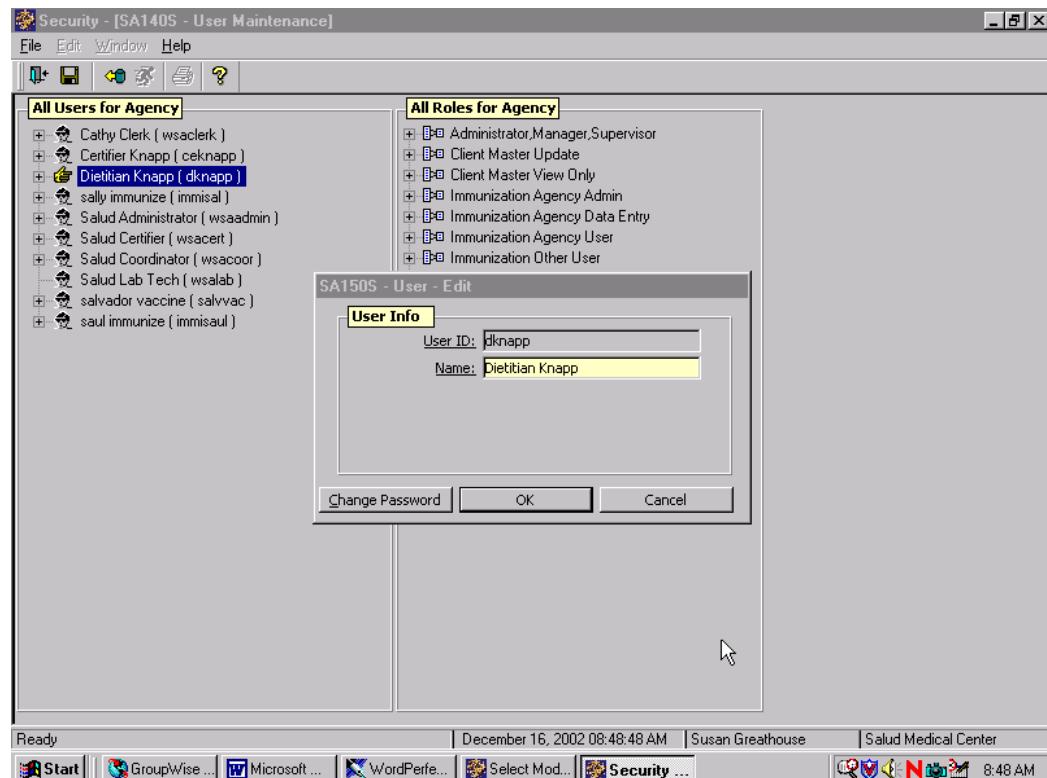


Figure 4: “Edit User” Pop-Up

3. Verify the User name as shown.

This is the User information you will be editing.

4. You may change two pieces of information in this window:

- User Name and/or
- User’s Password

5. To change the “User Name,” type the new information over the highlighted existing “name.”

6. To change the password, click on the “Change Password” button.

- A new pop-up window will appear allowing you to change the user’s password.
- Use this function to reset a user’s password when they forget it.

7. Type the new password, and then type it again in “confirm password” field.

8. **Click “OK.”**

This will confirm that the password and the confirmation match. If they do not, an error message will pop up prompting you to re-enter the information. If they do match, you will return to the “**Edit User**” pop-up.

9. **Click “OK” again.**

This will bring you back to the “**User Maintenance**” screen.

Assigning Roles

1. **To assign user roles, position the cursor on the user name. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**
2. **Select “Edit User Roles.”**

This brings up a pop-up with all the agency roles listed.

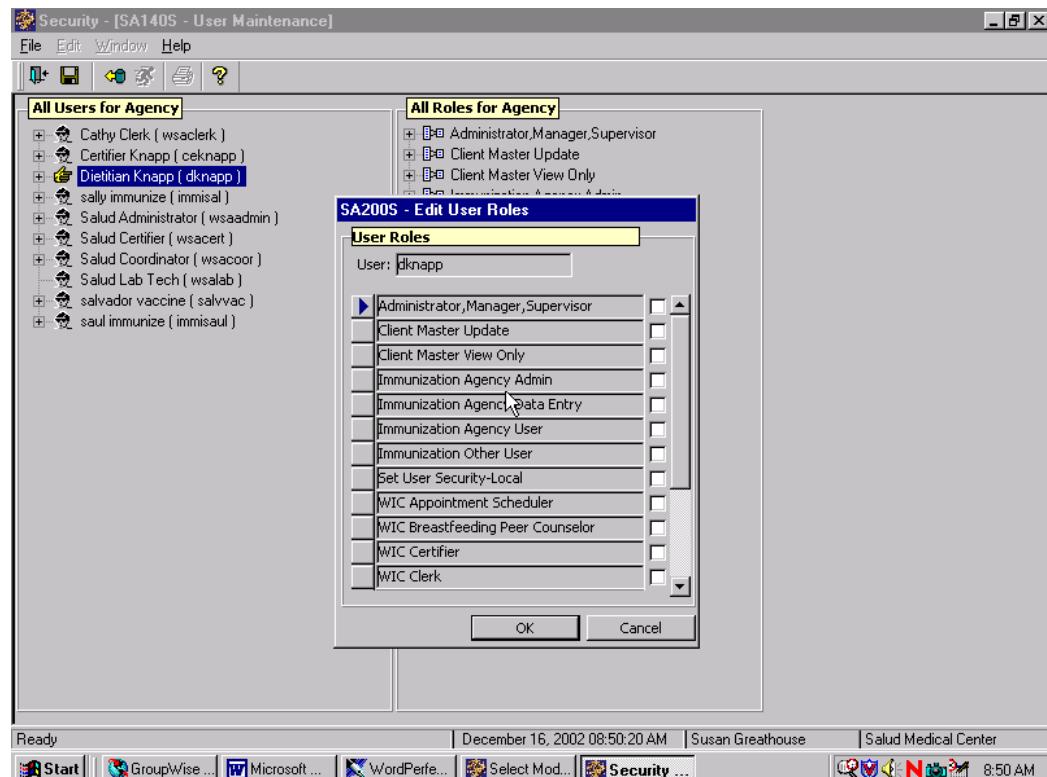


Figure 5: “Edit User Roles” Pop-Up

3. **Click on the roles that you would like to assign to that user.**

4. **When you are done, click “OK” to save and close the pop-up.**

» NOTE: Another way to add a role to a User name is to drag the User name to the security role to be added on the Roles List. This step may be repeated until all desired roles have been assigned. Click “**Save**” and the roles will be added.

Removing a Role

There are two different ways that User roles can be removed.

Preferred Method

1. **To remove user roles, position the cursor on the user name. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**
2. **Select “Edit User Roles.”**
This brings up a pop-up with all the agency roles listed.
3. **Click on the check marks next to the roles that you would like to remove from that user to “un-select” them.**
4. **When you are done, click “OK” to save and close the pop-up.**

Alternate Method

1. **Go to the Role to be removed in the Roles List and highlight the desired role and double click on it, or click on the “+” sign to expand the list. This will list all the Users in your agency who have been assigned this role.**
2. **Click on the User name. Right click on the mouse and a pop-up will display: “Remove User’s Role.”**
3. **Click on this pop-up to activate the “Remove User from Role” pop-up.**

This will display the User name that was highlighted.

4. **If this information is correct, click “OK” to remove this role from this User.**

This step may be repeated until all desired roles have been removed from this User.

5. **Click “Save.”**

The roles will be removed from the User name.

✖ *Tips and Shortcuts:*

- You should never allow your User ID to be used by anyone else.
- Never give your password to anyone except your System Administrator, and change it any time you think someone may know it.
- You may change your password at any time by clicking on the “Change Password” button when you login to TWIST. You will then be prompted to type your new password. Retype your new password a second time in the “Confirm New Password” field. Click on the “OK” button. Your password has been changed.
- To view the roles that are assigned to a User, you may click on the “+” sign in front of the User name and this will display the list of roles assigned.

→ *Practice Activities:*

Follow these steps as you use your Data Entry Documents to enter your staff IDs, names, passwords and roles in the Production database.

1. Click on “Maintain.”
2. Select “User.”
3. Right mouse click in “User” area of screen to insert new user.
4. Select “Insert User.”
5. Type in the User ID Logon in the “User ID” field.
6. Type in the actual staff name in the “name” field.
7. Type in the selected password in the “password” field.
8. Click “OK.”
9. Add the rest of your staff IDs and passwords.
10. Select a “User” for whom you want to add roles.
11. Right mouse click and select “Edit User Roles.”
12. Select appropriate roles for that user by putting a checkmark in box after each role.
13. Click “OK” to close pop-up and save roles.

✓ *Skill Check:*

The instructor will use the local agency Data Entry Documents to select a few staff and verify that the roles were assigned correctly.

 **Notes:**