



CABLearn

Bureau Administration of Petra **CUSTOMISED FOR SHEFFIELD-Sept 13 Setting up users**

May 2013 Customised Sept 13

Bureau handbook

Understanding and managing users

Features of Web Portal

This Portal is available to bureau administrators who will have access to the Managing Users screens that will enable them to:

- Create user accounts
- Disable user accounts
- Reset and change user passwords

The list of user accounts that are shown in the portal are for users across all bureau sites that form a particular member bureau. For example, if a member contains three bureau sites, all user accounts across those sites.

What is a user?

A user is someone from bureau or Citizens Advice who requires legitimate access into Petra. Each user will require a user account with a username and password, which will give them access to Petra. This record will contain information about the user's roles and the business unit they are associated with.

Note: All users have to be set up with an identifiable user name in order to meet information assurance requirements. No generic usernames or sharing accounts is permitted.

In creating user accounts, the bureau administrator will be required to specify the First name and Last name of the user. The system will then generate the username and password automatically from the details that have been provided. The username of the user will contain:

- The first 8 characters of the user's first name
- The first character of the user's last name
- A number to make the username unique if there are any duplicate names.

Creating user accounts and records



All users must be initially set up via the portal before they can access Petra. This will provide the username that is needed to create the user record in Petra.

Who can do this task?

You will be able to perform this task, if you have the role of Bureau Administrator, via the administration screens in Petra, and the Managing Users screen of the Citizens Advice User Administration Portal.

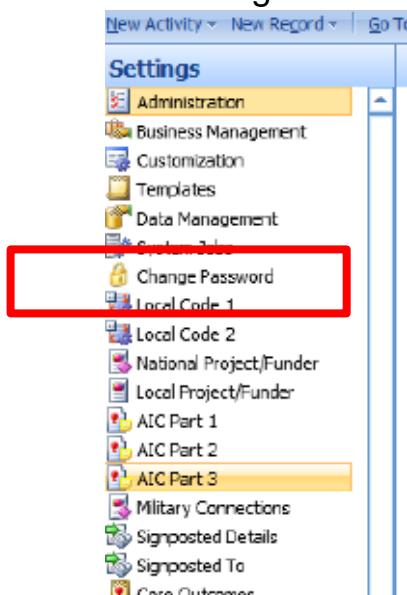
Note: The user making the admin request and the user approving the request should not be the same person.

Creating User accounts in User Administration Portal

1. Select Settings on the Navigation Pane

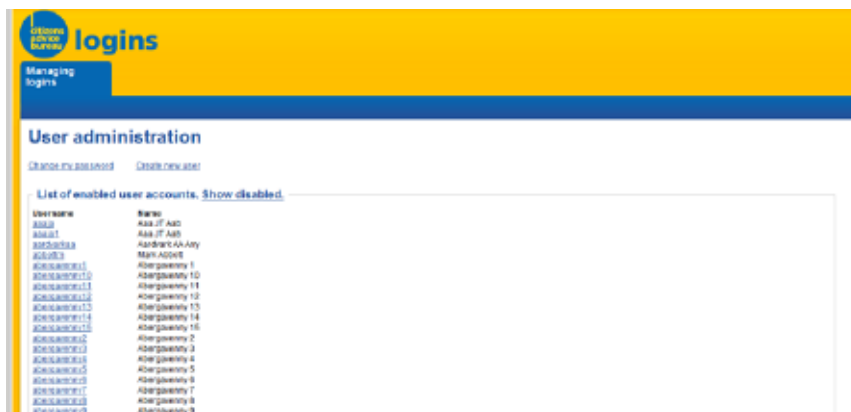


2. Select Change Password.



3. The Citizens Advice User Administration Portal will be displayed in another window. You will now need to log into the Portal by entering your username and password.

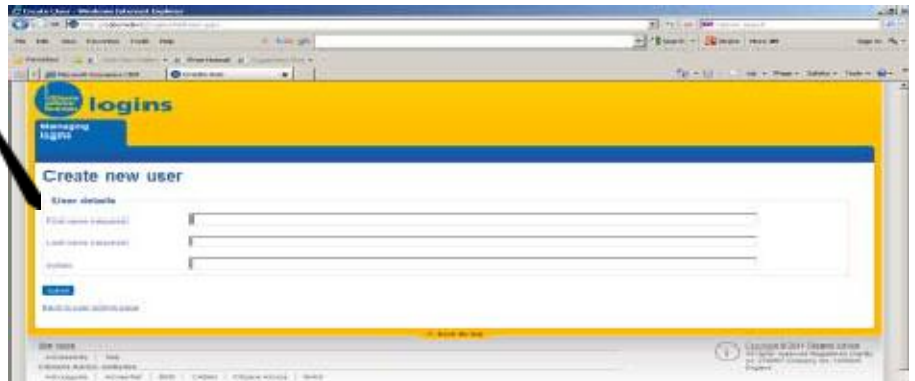
4. Click the **Create New User** link.



5. The Create New User screen will appear.

Complete the **First Name** and **Last Name** fields of the user, and any Initials if required.

6. Select the **Submit button**. The Username and Password of the user will be generated automatically and will appear on the top of the screen.



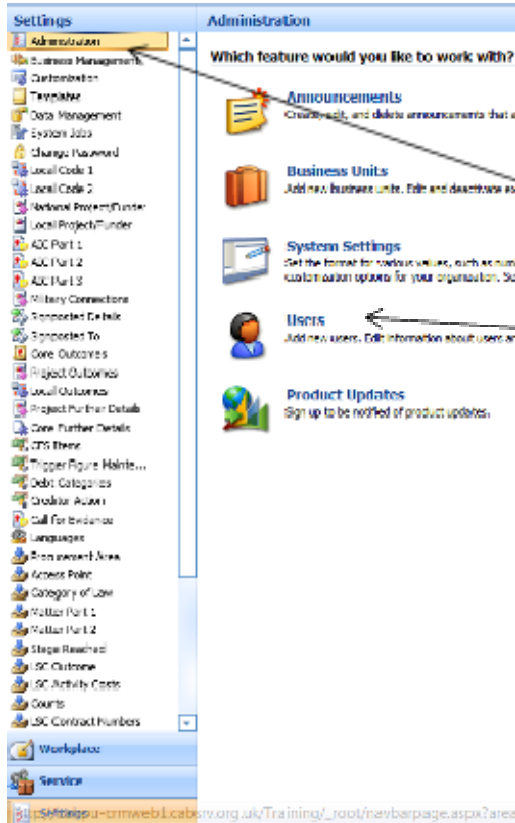
7. Make a note of the Username and Password as you will need this to create the user record in Petra.

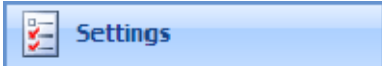
(**Tip:** Copy and paste username and password to be given to new user)

8. Select the Back to Admin Screen link. The user that you have created will appear in the Show Enabled Users list.

Note: If the user you are creating is a Bureau Administrator and will require access to the Managing Users screen of the Advice User Administration Portal, you will need to complete an Admin Request record within Petra that will then be processed by the Bureau IT Service Desk. (this should be via the Petra implementation officer if it is before the “go live” date.)

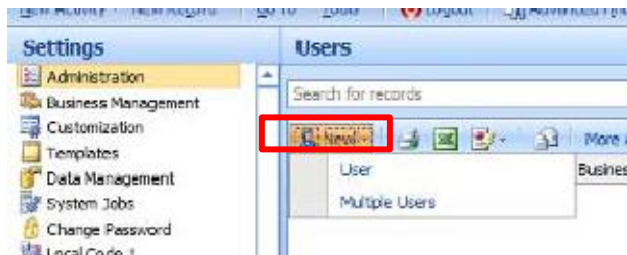
To create a user record in Petra




1. Select Settings on the Navigation Pane. 
2. Select Administration on the Navigation Pane.
3. Select the Users icon in the middle of the screen.

The Users screen will then appear.

4. Click **New** from the toolbar.
5. Select **User** from the drop down list. A new User tab will be displayed.



 Do not use (Multiple Users) options here, always use (User) option to add users into Petra one at a time, as auto assignment of teams and security roles does not happen if multiple users are added at the same time.

- In the **Domain Logon Name** field, enter the username of the user that was generated by the Citizens Advice User Administration Portal, e.g. cabsrv.

Windows Internet Explorer
 http://cabpu-crmweb1.cabsrv.org.uk/Training/biz/users/edit.aspx?id={40B8D44C-AE20-E311-B879-0050568000D5}#

User: Arnold, Tim
 Information

Details: Information, Teams, Work Hours, Workflows, Admin Requests, Feedback

Service: Resource Groups

The information provided in this form is viewable by the entire organization.

General Addresses Role Information

User Information

Domain Logon Name * DCABCRM\tima Main Phone

First Name * Tim Other Phone

Last Name * Arnold Home Phone

Title Mobile Phone

Primary E-mail Preferred Ph

E-mail 2 Pager

Mobile Alert E-mail Fax

- Move your mouse cursor to any field on the screen to enable Petra to search for the details of the First Name and Last Name of the User. The **First Name** and **Last Name** of the User will be automatically populated.

- Select **Yes** or **No** against the **Volunteer** field.

- Complete any other relevant fields within the User Information section. **NOTE THAT INFORMATION PROVIDED IS VIEWABLE EVERYWHERE**

Windows Internet Explorer
 http://cabpu-crmweb1.cabsrv.org.uk/Training/biz/users/edit.aspx?id={40B8D44C-AE20-E311-B879-0050568000D5}#

User: Arnold, Tim
 Information

Details: Information, Teams, Work Hours, Workflows, Admin Requests, Feedback

Service: Resource Groups

The information provided in this form is viewable by the entire organization.

General Addresses Role Information

Mailing Address

Street 1 State/Province

Street 2 ZIP/Postal Code

Street 3 Country/Region

City

Other Address

Street 1 State/Province

Street 2 ZIP/Postal Code

Street 3 Country/Region

City

Preferred Address Mailing Address

-

Bureau administration of Petra – part 1: Tutor notes and bureau handbook

11. **Business Unit** will be automatically populated, choose the same **Site of the user from the look up list**. This is the primary bureau location and site the user will be mainly based at.

Alert: All users in Petra should always be added at a Bureau Level e.g. User Business Unit = 'Citizens Advice Bureau'. No User should be added to a member level e.g. 'Citizens Advice (Member)'. When you are selecting the site for the user, please ensure that the Site and Business Unit have the same value. If you select a different Site to that of the Business Unit, this will have implications on scheduling and reporting.

Note: the bureau administrator role is the only role where the bureau and site will be different - for all other roles they should be the same. The site Membership Administrators will be where they are normally based.

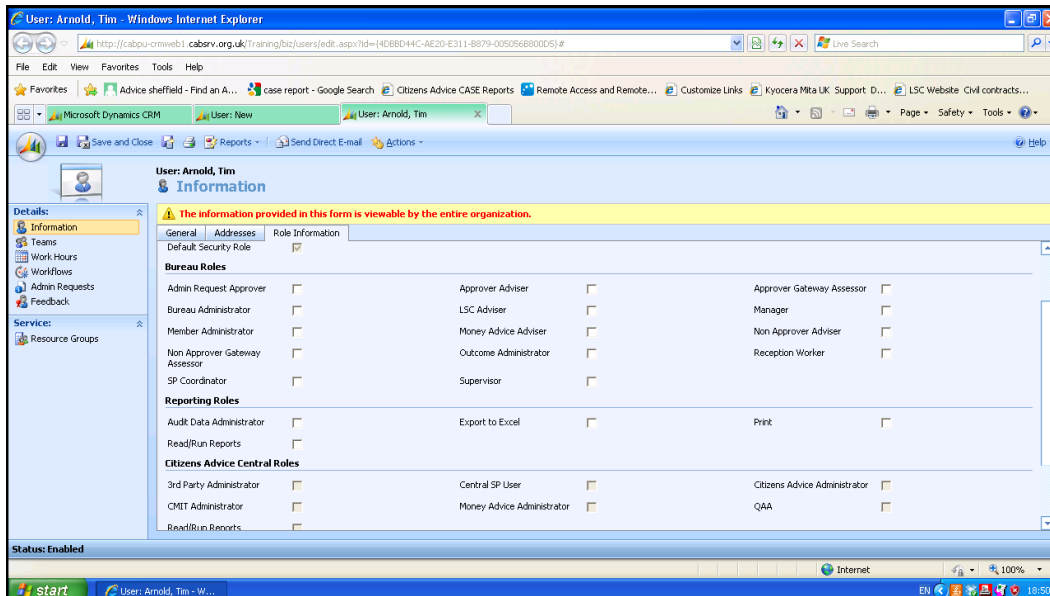
12. Within the Supervisor Checking Percentage section, select the Checking Percentage from the drop down list. Percentages are discussed in more detail in Supervisor Training

13. Within the E-Mail Configuration and Client Access License (CAL) Information sections, **leave the items as specified in the drop down lists.**

14. Complete any other relevant fields on the Addresses tab if required.

15. Select **Save** from the toolbar

Adding roles



Sheffield Citizens Advice has recommended “sets” of roles for

Assessor or Adviser –experienced (Approver)

Assessor of Adviser- inexperienced or vol (Non-approver)

Supervisor

Social Policy Co-ordinator

Reception & clerical only

Site (aka Bureau) administrator (*can only be set up by Citizens Advice*)

Member administrator (*can only be set up by Citizens Advice*)

See attached sheets for “adding roles” which show which roles are needed For each type.

Adding teams

Select Teams from the Details section of the left hand side. Details on creating Teams can be found in Petra-settings > Administration > Teams.

17. Select **Join Teams** to add any additional teams if required. Do not remove any teams that have been created here by default, e.g. Global team and your Member Bureau team, as this may impact the user’s ability to use Petra. The Global team is used to share core Petra records and the Member-Bureau Citizens Advice Bureau (Member) Team is used for the sharing of local codes across Member bureaux eg local project/funders etc.

Sheffield Citizens Advice has not yet decided on Local Teams

Editing users

You may wish to edit the details of a user if:

- They have changed their name, e.g. changes to their surname as a result of getting married.
- Their primary bureau has changed to another bureau site under the same member.
- They require additional or removal of roles.

To edit the name of a user in Petra

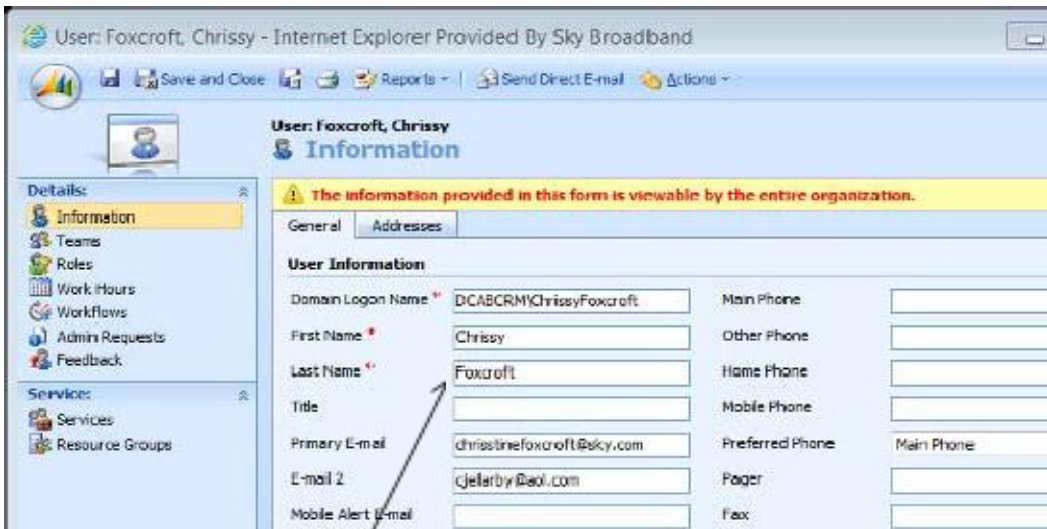
If you require changes to the name of a user, this will have to be done in Active Directory for the user's account in Active Directory as well as the user's record in Petra. For the changes to be done in Active Directory, you will need to submit an Admin Request to the ICT Services Support team who will be able to make these changes.

Alert: Please note that changes to the name of the user will only be for their display name, and not their username. The display name is the name that appears against the user's record in Petra and their user account in Active Directory. For example a user can have their name changed from Claire Bloggs to Claire Smith, however their username which is ClaireB will remain the same. This is due to the internal setup and structure of Active Directory.

1. Select **Settings** on the Navigation panel.
2. Select **Administration** in the left hand navigation pane.
3. Select **Users** from the Reading Pane.
4. Enter the name of the user you wish to edit in the **search field** on the top of the screen. (Tip: Create a view specific to your bureau).

The user record will be displayed.

- . Double click on the record to open it.



6. Edit the **Last Name** of the user.
7. Select **Save and Close** to save the changes.

All instances of the user's old name will be updated with the edited name in Petra.

Alert: Please do not make any changes to the Domain Logon Name, as if changes are made here users may not be able to log in. If you require to make any other changes to the user's name, i.e. changes to the user's first name, you will have to follow the process of deactivating users.

You can also make the following edits from the same screen:

Change the roles of a user

26. Select **Roles** from the Details section of the left hand side. The allocated roles of the user will be displayed. **Please Note, do not remove the 'Default Security Role' which is assigned every user automatically by Petra.**
27. Select Manage Roles from the toolbar to add and remove roles for the user. The Manage Roles screen will be displayed. Select or deselect the roles for the user as appropriate.
28. Select **OK**.
29. Select **Save and Close** to save the changes.

Change the bureau of a user

Note: You will only be able to change the bureau of the user to another bureau that forms part of the same member. If you wish to change the bureau of a user to another bureau that is part of another member, you will have to follow the steps within Deactivating users.

30. Select the relevant **Business Unit** and Site of the user from the look up list. This is the primary bureau location and site the user will be mainly based at.
31. Select **OK**.
32. Select **Save and Close** to save the changes.

Deactivating Users – to follow...

Control and change Passwords

You should change your password should on a monthly basis. The system will remind you every 60 days.

Background information

Passwords must:

- be **at least eight characters** long
- contain characters from **at least three** of the following five categories:
 - English uppercase characters (A - Z)
 - English lowercase characters (a - z)
 - Base 10 digits (0 - 9)
 - Non-alphanumeric (For example: !, \$, #, or %)
 - Unicode characters

MUST not contain three or more characters from the user's account name

Ways to create secure and easy to remember passwords

Use substitution

You can make up your own substitution rule and use that to adapt simple words so that they follow the rules above and are still memorable.

For example:

- **replace** a with 4 to get Holid4y rather than Holiday.
- replace l with ! to get Ho!iday rather than Holiday.
- replace capitals with lowercase and vice versa will give you tOM rather than Tom.
- replace any letter with the next in the alphabet to get dbu rather than cat.

A mix of substitutions can make a common word impenetrable.

Passwords should not be re-used but substitution policies can be as long as they are kept secret at all times.

Use a pass phrase A pass phrase is often easier to remember. Its length and ability to be combined with substitution techniques make it a good option.

For example:

- oh ****!stubb3dmyto3
- h1w2r – Here's one way to remember

Use embedding Use two words with one embedded within the other.
sumholidaymer is harder to crack than summerholiday.

Use misspelling You can misspell a word deliberately.

Krissmass will not appear in a dictionary – while Christmas will.

Reset user passwords

Bureau administrators have the facility to reset user passwords. This may be required if the user has not been able to reset their passwords before the expiry date of their password. If the password is reset, the system will automatically generate the password to meet the password criteria.

Users are able to change their passwords if they require within the User Admin portal. They will have to create a new password that will meet the password criteria.

Resetting a password

As a bureau administrator you can reset passwords for users in your bureau and bureau sites that form your member. You may be required to reset a password if the user has forgotten their password, or if the password has expired. You will only be able to reset passwords of users via the Citizens Advice Web Portal.

To reset a password

1. Log into the Citizens Advice User Administration Portal.
2. Select the username of the user that you wish to reset the password for. The Edit user screen will be displayed.

