QUICK REFERENCE GUIDE:

# Managing DOT and Consultant Users

## Background:

This guidance is for Managing User accounts.

- Add a DOT User
- Add a Consultant User
- Associate Person to a New Domain
- Assign User Roles
- Assign Regional Contract Authority
- Update a User's Name Change
- Terminating User Access

Prior to adding a new User to AWP, they must have an LDAP account. All SOA employees have LDAP accounts. A consultant's DOT sponsor (usually a Project Manager) must submit an AlaskaNow Ticket requesting that an LDAP account be set up for the consultant.

## Roles:

Module Admin, CRL Module Admin, CRO Module Admin, CM Module Admin

## Navigation:

Connect to the SOA Network and search for the DOT and Consultant users within the Directory Server Gateway (DSG): https://dsgw.state.ak.us/DSG/. The User's information on this screen will be used to populate the AWP fields. If the search results don't produce the person you are looking for, they do not have an LDAP account.

## Add a DOT User:

Within AWP: System Administration -> Persons

1. In the Person Overview, search for the first name or last name of the person to see if they already have an Account in the system.
   a. If there is no entry for the Person proceed to Step #2.
   b. If there is an entry for the Person, open their profile by clicking on the user's last name hyperlink and verify that all information in the profile is correct.
      i. If the Person is associated with a DOT User account, no further setup is required. Alert the DOT user that they can log in to AWP using their SOA ID and webmail password.
      ii. If there is an entry for the person, but their User ID is a number (their WAQTC number), modify their **Person ID** to match their DSG User ID and skip to step #5.
      iii. If there is an entry for the Person but they are set up as anything other than a DOT User (i.e. Consultant or External User), a new account will need to be created for them to differentiate actions they are taking as a DOT employee vs. actions they have taken as a consultant or contractor. Proceed to step #2.
2. Click the **Component Actions Menu** and click **Add.**
3. Enter the DSG User ID in the **Person ID** field.

4. Enter the **First Name**, **Middle Initial**, and **Last Name** fields as they appear in the DSG (this is the final step you will use information from the DSG).
5. Press **Save.**
6. In the **Staff Type** dropdown select **Agency** and press **Save**.
7. Click the **Component Actions Menu** and press **Associate Person to Domain.**
8. Make sure the **Agency User** box is checked.
9. Use the User ID, or first name, or last name to search for the person and select them when their name appears in the list.
10. Press **Associate.**
11. Select the **User** quick link at the top of the Person Summary.
12. To Assign User Roles, skip to step #4 of the Assign User Roles section.

## Add a Consultant User:

System Administration > Persons

1. In the Person Overview, search for the first name or last name of the person to see if they already have a User Account in the system.
   a. If there is no entry for the Person proceed to Step #2.
   b. If there is an entry for this Person, open their profile by clicking on the user's last name hyperlink and verify that all information in the profile is correct.
      i. If the Person is associated with a Consultant User account, skip to step #11.
      ii. If there is an entry for the person, but their User ID is a number (their WAQTC number), modify their Person ID to match their DSG User ID. Skip to step #5.
      iii. If the Person's account is set up as anything other than a Consultant User (i.e. DOT or External User), a new account will need to be created for them to differentiate actions they are taking as a Consultant vs. actions they have taken as DOT or a contractor. Proceed to step #2.
2. Click the **Component Actions Menu** and click **Add.**
3. Enter the DSG User ID in the **Person ID** field.
4. Enter the **First Name**, **Middle Initial**, and **Last Name** fields as they appear in the DSG (this is the final step you will use information from the DSG).
5. Press **Save.**
6. In the **Staff Type** dropdown select **Consultant** and press **Save**.
7. Press the **Component Actions Menu** and click **Associate Person to Domain.**
8. Make sure the **Agency User** box is checked.
9. Use the User ID, or first name, or last name to search for the person and select them when their name appears in the list.
10. Press **Associate.**
11. Select the **User** quick link at the top of the Person Summary.

12. Begin to type the Consultant name in the **Consultant Access** search field and select when it appears. Click **Save**.
13. To assign User Roles, select the **User Roles** Tab.
14. Click **Select Roles**.
    a. Begin to type the Role ID or Role Description in the search field or press **Show first 10.**
    b. Upon finding the appropriate role select the role and click **Add to User.**
15. Enter today's date in the **Effective Date** and set the **Status** to **Active.**
16. Click **Save.**

## Next Steps:

Project Staff can now assign the User Contract Authority. See the *Contract Authority - User QRG* for guidance.

## Associate Person to a New Domain:

When a new LDAP account is created for an existing AWP User, their AWP User account will need to be Associated to the New Domain. This can occur for various reasons including:

- A Consultant's LDAP account was not renewed before it expired – they must be renewed annually to stay active.
    - If this happens, the DOT Sponsor must submit an AlaskaNow Ticket requesting that an LDAP account be set up for the consultant again.
- The User's name changed.
    - Before a user's name can be changed in AWP, they must first update their name with the State of Alaska, and it must be reflected in the DSG (https://dsgw.state.ak.us/DSG/).

If a Consultant User switches from one consultant firm to another, their account does not need to be associated to a new domain. See Add a Consultant User for guidance to update the **Consultant Access** field.

System Administration -> Users

1. Enter the first name, or last name, or User ID into the **Search** field to find and select the **User ID** to be updated.
2. From the User Summary, update the **Person ID, First Name, Middle Initial, Last Name**, and **Previous Last Name** fields, as needed.
3. Click **Save**.
4. Click the **Component Actions Menu** and select the **Disassociate User from Domain** action.
5. Select the **Component Actions Menu** and select **Associate Person to Domain**.
6. In the modal window enter the new User ID, or first name, or last name in the **Search** field.
7. Select the row with the new user ID and name and press the **Associate** button.

QUICK REFERENCE GUIDE:

# Managing DOT and Consultant Users

## Assign User Roles:

Roles are sets of permissions that determine which areas of the system a user can access and what actions they are allowed to perform. They ensure that users have the appropriate level of access to perform their tasks and only interact with the functions and data necessary for their specific responsibilities. Assigning the correct roles ensures sensitive information is protected and unauthorized actions are prevented.

System Administration > Users

1. From the dashboard, click the **Users** link.
2. In the search box, begin to enter the User ID, or first name, or last name (if nothing populates the person hasn't been entered into AWP).
3. Click the **User ID** link.
4. Select the **User Roles** Tab.
5. Click **Select Roles***.
   a. Begin to type the Role ID or Role Description in the search field or press **Show first 10.**
   b. Upon finding the appropriate role select the role and click **Add to User.**
6. Enter today's date as the **Effective Date** and set the **Status** to **Active.**
7. Click **Save.**

*To copy the role(s) from another Agency user, select the **Actions Menu** to the right of **Select Roles** and click **Copy Roles from another User.** Select the user whose roles you would like to copy. Please note that the effective date from the copied role(s) will also be copied but any contract authority for that role will not. Update the **Effective Date** field to today's date. Click **Save**. (Roles should not be copied for Consultant Users. Specific roles should be selected.)

## Next Steps:

The User should refresh the page to allow the role to appear in their drop-down. Project Staff can now assign the User Contract Authority. See the *Contract Authority - User QRG* for guidance.

## Assign Regional Contract Authority:

Regional Contract Authority should only be granted to users with support roles that need access to all contracts within a region (Construction Project Managers, Construction QA, Rovers, etc.). Most construction roles should be granted access on a contract-by-contract basis by project staff.

System Administration -> Persons

1. In the Person Overview, use the search bar and filters to find the **Person** to which you will be adding contract authority and select their **Last Name**.
2. Select the **Administrative Offices** tab.

3. Press the **Select Administrative Offices** button. In the modal window press **Show first 10,** select the correct Office and press **Add to Person**.
4. Click **Save**.
5. Press the **User** quick link at the top of the page.
6. Select the **Contract Authority** tab.
7. Click the **New** button.
8. Enter the **Administrative Office**, **Role** (that should have the administrative office authority), **Effective Date**, and toggle the **Status** to **Active**.
9. Click **Save**.

## Update a User's Name Change:

To Update a User's Name Change, follow the steps outlined in Associate Person to a New Domain.

## Terminating User Access:

When a User should no longer have access to AWP, their account should be disabled.

System Administration -> Users

1. Enter the first name, or last name, or User ID into the **Search** field.
2. Select the **User ID** to be updated.
3. In the User Roles tab, check the **Disable User** checkbox.
4. Click **Save**.

## Next Steps:

If the terminated Agency User is a Module Admin listed on the AWP Homepage, please email the AWP Team at dot.awp.team@alaska.gov. Provide the name of the person, and request they be removed from the dashboard.