eDMR

(electronic Discharge Monitoring Report)

Facility User Management Guide

(For use by the Facility Owner and the Facility Administrator)

"To preserve, protect, and enhance North Carolina's water…"

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Section 1.   Summary of the eDMR Application

The eDMR application has the following two major areas and a guide for each:

eDMR Facility User Management Guide	Register Users
	Manage the User Profile Information
	Authenticate and Authorize Users
eDMR Facility Reporting Guide	Create, Certify, and Submit eDMR Reports
	Print eDMR Reports
	View eDMR Reports

1.1   Facility User Management in eDMR

1.1.1   Overview of Facility Users

Facility users are able to work only with the facilities for which they have permits. Their usage of the application is governed by the user group to which they are assigned and the accompanying privileges and permissions granted to each group. See *Section 1.2 – User Groups and Privileges* for a chart of the Groups and related Privileges.

Facility Owner – the designated person for a specific permit/facility and/or has delegated signatory authority for the permit. (This is the person who signs the certification statement on the back of the form.)

Facility Administrator – the person(s) responsible for managing user information for the facility/permit.

Submitter – the person(s) who submits the report. May be the owner or other delegated person that has signatory authority for the permit. Submitter privileges require the completion of an Electronic Signature Agreement.

Certifier – the person(s) certifying the data entered and corresponds to the ORC or backup ORC for the permit.

1.1.2   Basic Rules in Creating Users

- The Facility Owner shall create the Facility Administrators for their facility.
    - The owner can only associate the Facility Administrator with permits tied to that owner and facility.
- The Facility Owner and/or Facility Administrator shall create all Facility Users for their facility.
    - The Facility Owner and Facility Administrator can only associate the Facility Users with permits associated to that Facility Owner or Facility Administrator.
- **DWR must grant or revoke Submitter privileges for all users.**

1.1.3   User IDs

Each User ID must be unique and will be the Facility User's email address of their choice.

When creating User IDs, it is recommended that the User ID be all lower case.

(For example: *jane.doe@yahoo.com*).

Write down the User ID you requested on your *User Create Request Form* here:

User ID: _____

1.2   User Groups and Privileges

The User will be assigned to one or more of the six User Groups.

1.2.1   User Groups and Privileges Table

The table below shows each User Group and its associated User Privileges.

User Privileges	Facility User Groups					
	Owners	Facility Administrators	Submitters	Certifiers	Data Entry	View Only
Manage Facility Administrators	X					
Manage Facility Users	X	X				
Create/Update eDMR Reports	X	X		X	X	
Certify eDMR Reports	X	X		X		
Submit eDMR Reports to BIMS			X			
Revise eDMR Reports	X	X		X	X	
View eDMR Reports	X	X		X	X	X
Delete eDMR Reports and Report Pages	X	X		X	X	
Import	X	X		X	X	

A facility Owner and/or Facility Administrator can assign the facility users to the appropriate user groups. A user can be assigned to multiple groups. Users can only see the menu options for which that user has privileges.

Facility Owner – the designated contact for the permit and/or has delegated signatory authority for the permit. (This is the person who signs the certification statement on the back of the form.)

Facility Administrator – the person(s) responsible for managing user information for the facility/permit.

Submitter – the person(s) who submits the report. May be the owner or other delegated person that has signatory authority for the permit. Submitter privileges require the completion of an Electronic Signature Agreement.

Certifier – the person(s) certifying the data entered and corresponds to the ORC or backup ORC for the permit if facility is classified and requires a certified operator. Otherwise, certifier can be any user.

The group privileges are cumulative. If multiple groups are assigned to a user, the system will use the highest privilege. For instance, if the user was assigned to both VIEW_ONLY and DATA_ENTRY groups, the user would be able to not only view eDMR reports, but have the Data Entry group privileges, which includes creation and maintenance of eDMR reports.

To learn how to assign Groups to users, go to section *2.5 Managing User Privileges*.

1.3   Activities of the Facility Owner / Administrator

The Facility Owner and Facility Administrator normally perform the activities explained in this section, however the DWR Administrator also has the authority to perform these tasks if necessary.

- Facility Owner creates the Facility Administrator.

- Facility Owner can only associate the Facility Administrator to permits which are also associated to that Owner.

- Facility Owner or Facility Administrator should perform all facility user management activities except:

    o Creating the Owner.

    o Assigning users to the Submitters group (done by the DWR Administrator).

- The Owner and Facility Administrator will setup the other users and assign them to the appropriate groups for each permit specified.
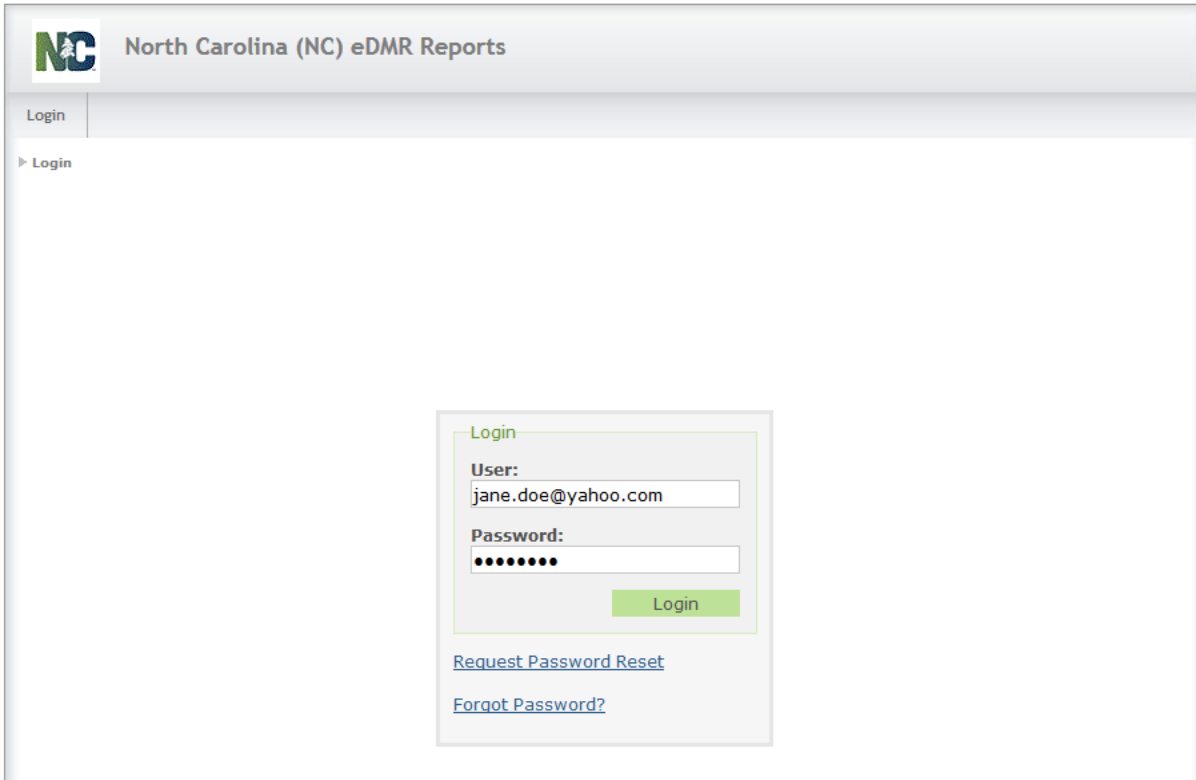
Section 2.   Facility User Management

Before you begin make sure you have the DWR User Request form with your user profile and log on information. This information will be required to use the application.

2.1   Logging in to the eDMR Application

2.1.1   Login Screen

Use your internet browser and enter https://ncnode.enr.state.nc.us/nc-edmr/login.do;?m=view to access the user login screen shown below:

Enter your User ID and Password that was provided by DWR to log in to the eDMR application.

Your User ID is the email address provided to the Facility Administrator when your account was setup. *(See Section 1.1.3 for more information.)*

NOTE:* Passwords must consist of at least eight (8) characters in length and must include at least one (1) uppercase letter, at least one (1) lowercase letter, and at least one (1) number. *There is no limit on failed login attempts for non-submitter users. However, users with submitter permissions will receive a warning after three (3) failed attempts to log in and the account will be locked after five (5) failed attempts.

2.2 Creating Facility Users

Only Facility Owners and Facility Administrators can create users and manage user privileges.

2.2.1 Main Menu Tabs

This guide will focus on the **(1) User Management** section highlighted below.

The sections on Create Reports & eDMR Reports are covered in the Facility Reporting Guide.

If, after reviewing this guide and logging on to the application, you find that the menu option you need to perform your job is not available to you, please consult your administrator.

2.2.2 User Management Menu List
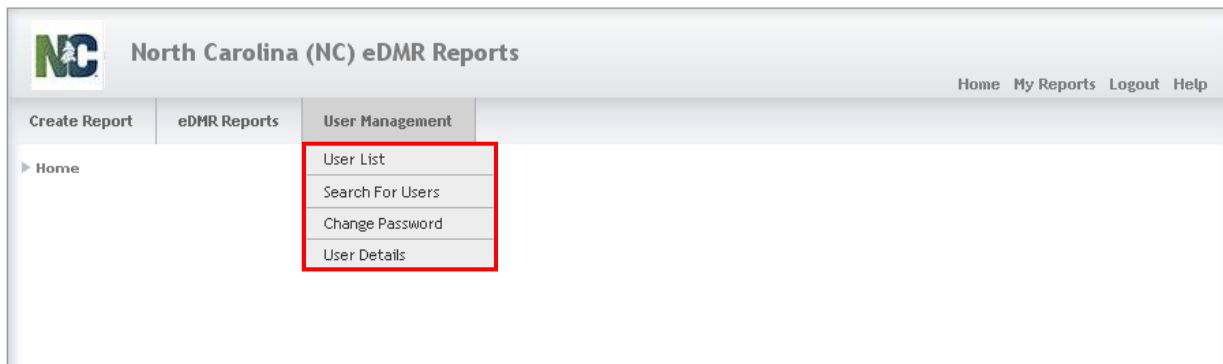
User management options will vary based on the privileges granted to the user. User List and Search For Users are actions available only to Owners and Facility Administrators. Change Password and User Details are available to all users. All of these are covered later in this guide.

2.2.3 User List Screen

To create the Facility Administrator, the Owner selects **(1) User Management** on the menu bar, then **(2) User List** from the drop down menu options. Then click on the **(3) Create User** button.
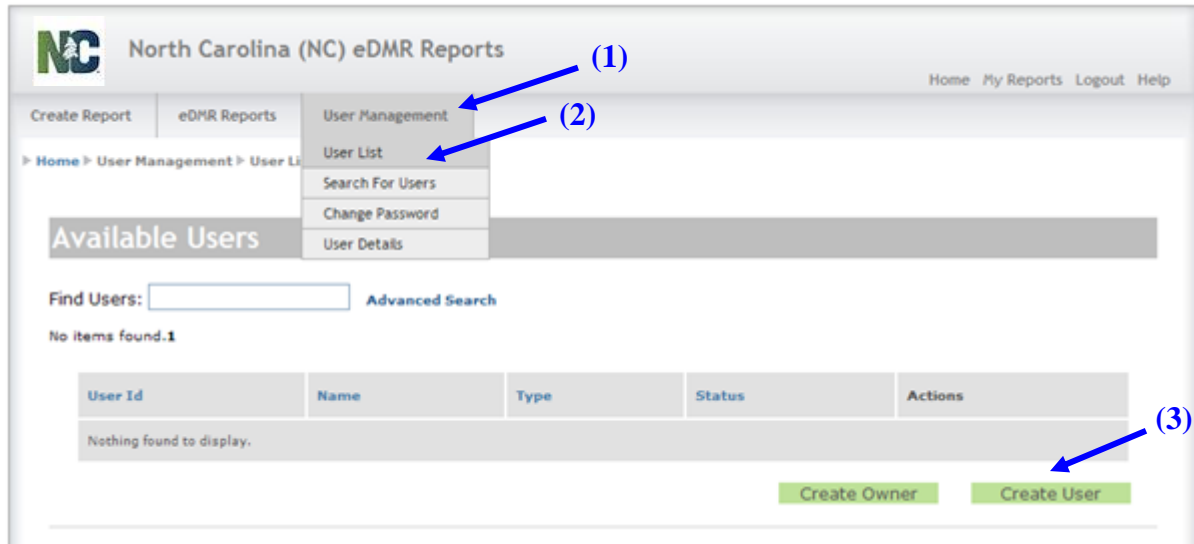
2.2.4   Create and Edit New User – Information and Details Screens

This activity is performed by the Facility Owner to create the User ID for the new Facility Administrator. This information is taken from the "New User" form that the Facility Administrator submitted to the Facility Owner.

Select **(1) FACILITY_USER** as User Type.

All fields must be filled in except Middle name, which is optional.

When finished entering all of the information, click on the **(2) Create** button.

Once the FACILITY_USER has been created, the Facility Administrator will need to assign at least one of the owner permits to their account in the Associate Permits screen. If a permit is not associated with the new user at this step, the user account becomes inaccessible to the owner and facility administrators.

This is the Edit User Details – Associated Permits screen for the user called **(1) "Jane Doe".** This screen will display after the "Create" button is pressed in the previous step.
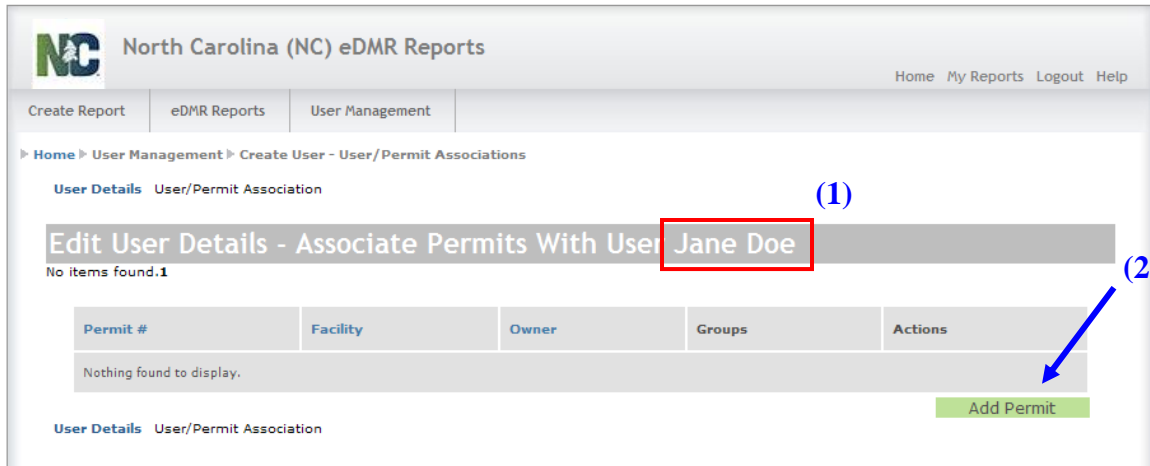

Click on the **(2) Add Permit** button to associate the first permit(s) to this user.

A popup window will appear with a drop down selection list showing only those permits associated with this facility. Only one permit can be added at a time.

Select the appropriate **(1) Permit** and then click on the **(2) Add Permit** button.
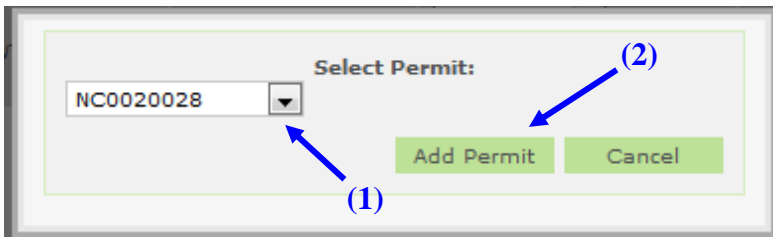
When the **(1) Permit # NC0023230** is first associated to the user **(2) Jane Doe,** the group default value is **(3) VIEW_ONLY**.
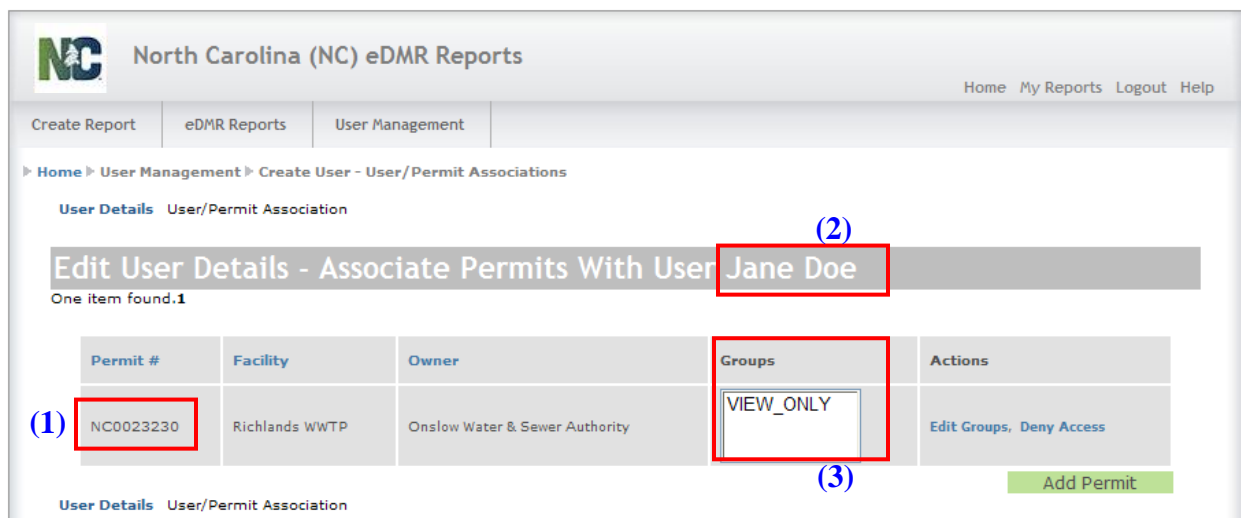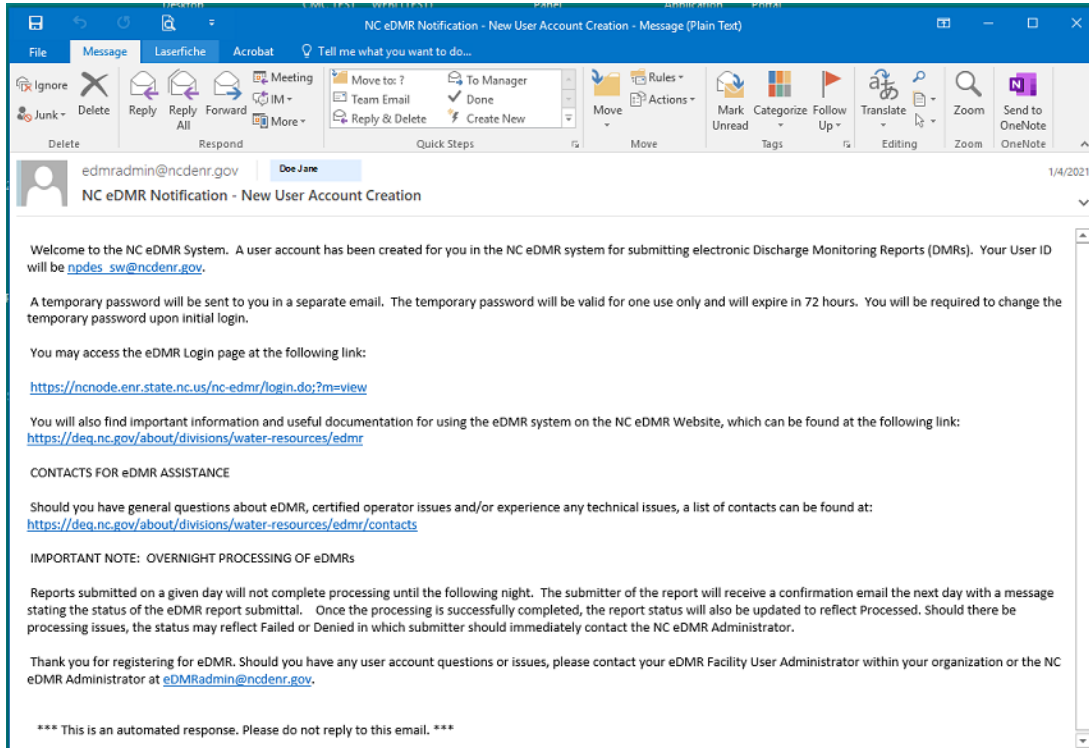

Adding additional privileges will be explained in the steps that follow.

2.2.5   User Creation Confirmation Email

Upon entering a new user account (Submitter or Non-Submitter) in eDMR, there will be 2 emails that will be sent to the user's email account.

The first email will be the "Welcome to eDMR" email. The following is an example of the content of the email:
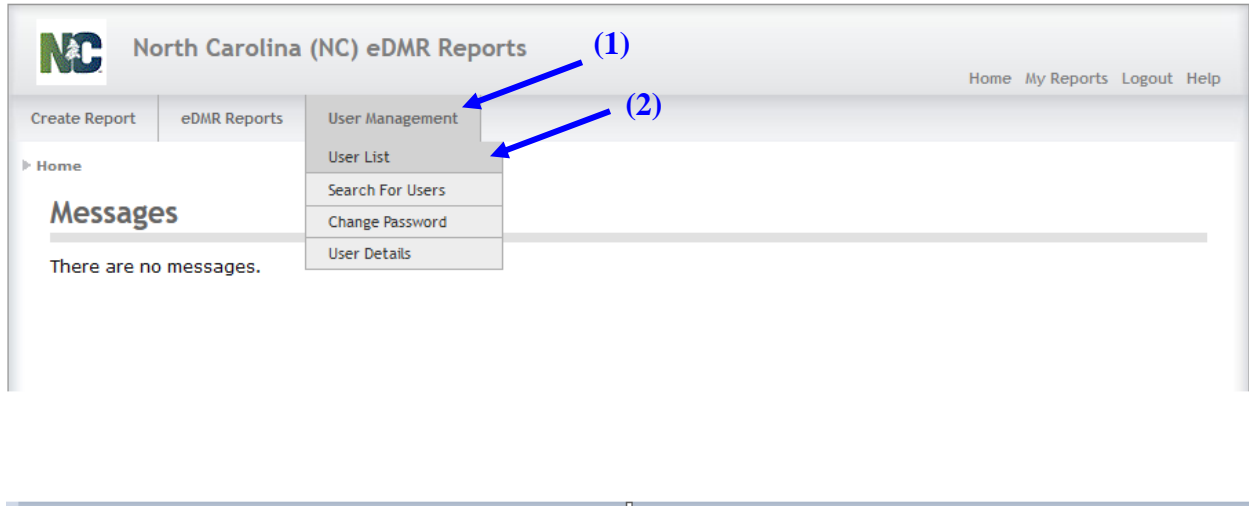

A second email will also be sent to the user containing a temporary password that will be valid for 72 hours. The following is an example of the content of the email:
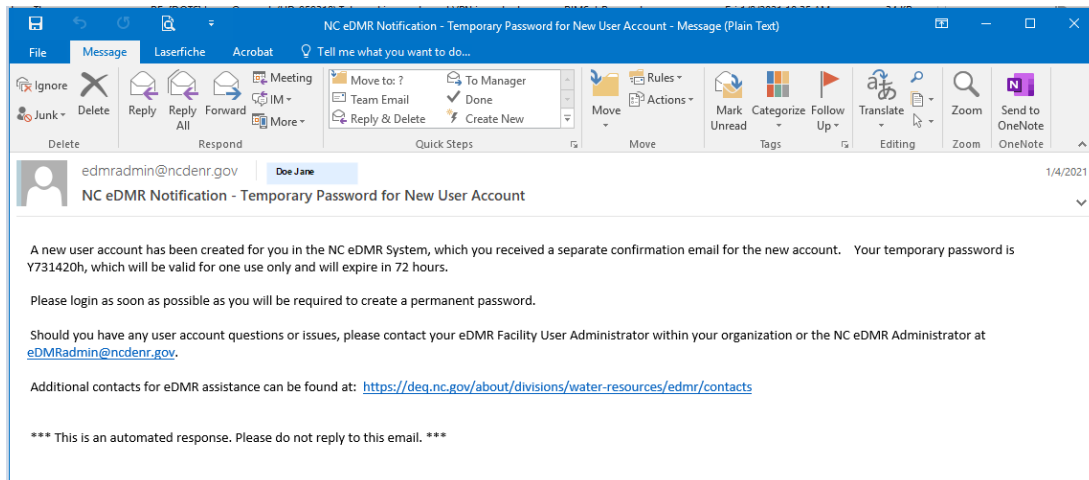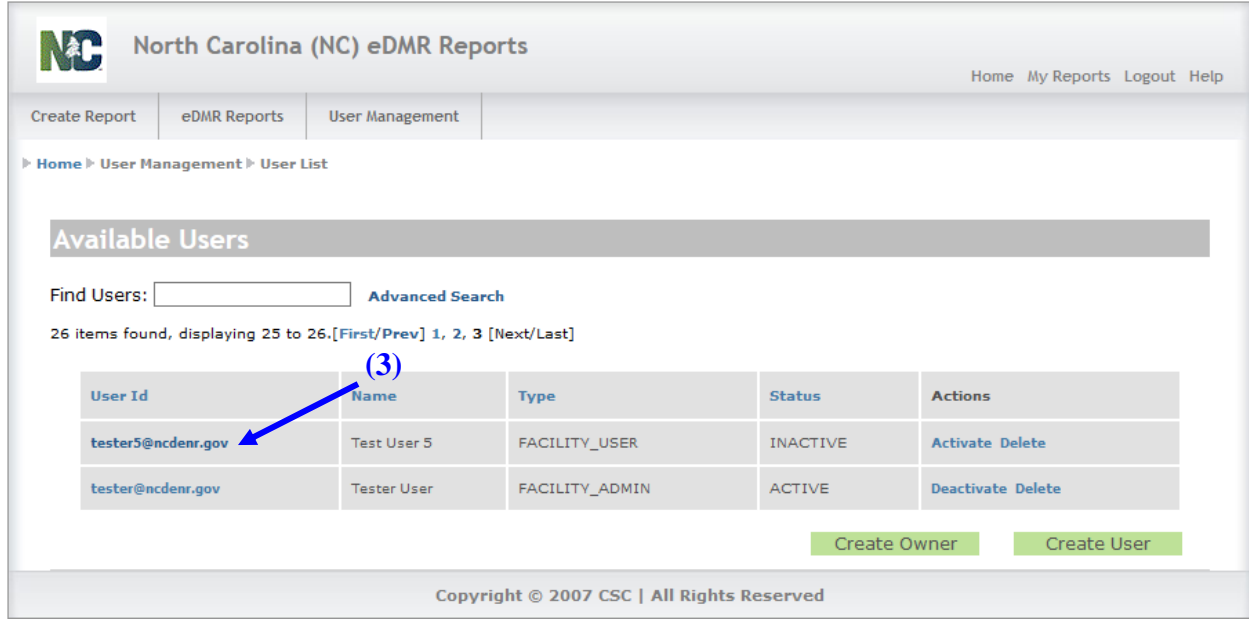
2.3   Associating Permits to the User

2.3.1 Available Users Screen

Select **(1) User Management** and then **(2) User List**.

A list of users will appear from which you can select the user account to manage and associate permits to the account. Click on the **(3) User ID** that you want to manage.

2.3.2 User Details Screen

The Edit User Details screen displays the user information profile just entered. This screen can also be used to perform maintenance on this user's profile information. Each permit must be individually associated to a user. *The user details can only be maintained for user's that do not have Submitter permissions. All changes to submitter user account details must be completed by the NC eDMR Administrator.*

Click on the (1) User/Permit Association link.
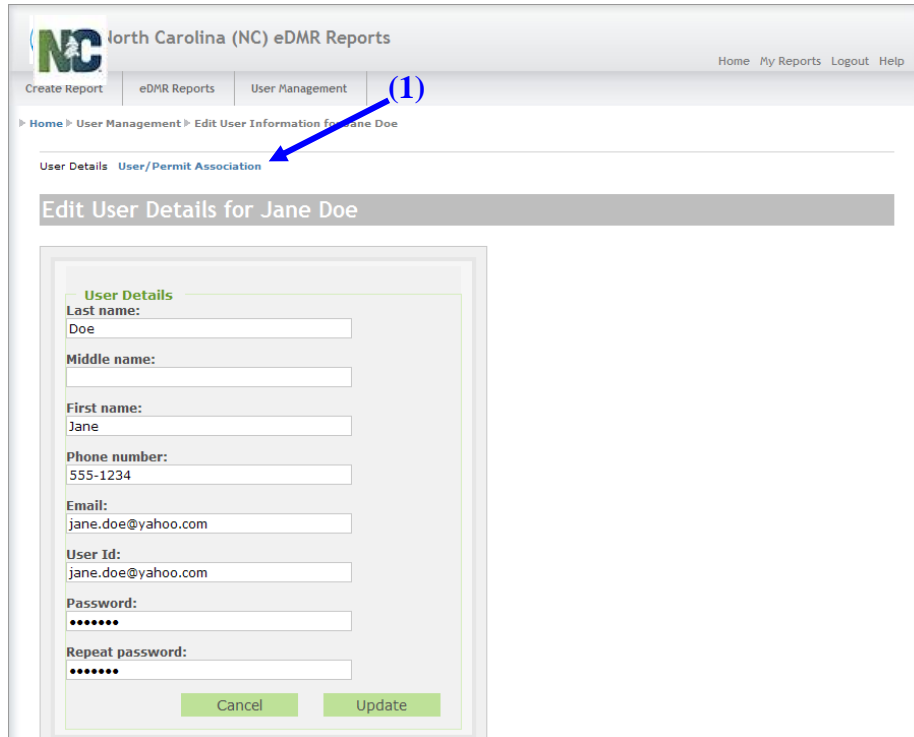
This is the Edit User Details – Associated Permits screen for the user called **(1) "Jane Doe".**
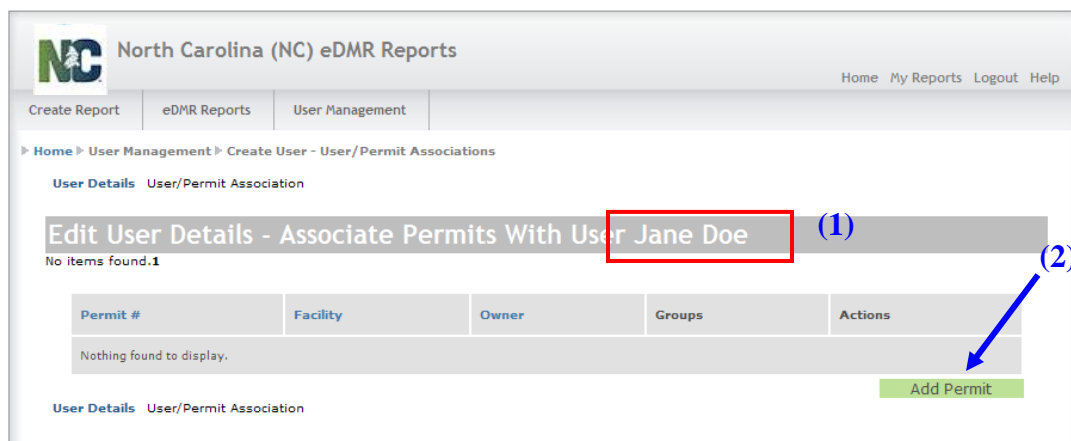
Click on the **(2) Add Permit** button to associate the first or additional permit(s) to this user.

2.3.3   Select Permit Popup Window

A popup window will appear with a drop down selection list showing only those permits associated with this facility. Only one permit can be added at a time.

Select the appropriate **(1) Permit** and then click on the **(2) Add Permit** button.

2.3.4   User Details – Associated Permits

When the **(1) Permit # NC0023230** is first associated to the user **(2) Jane Doe,** the group default value is **(3) VIEW_ONLY**.
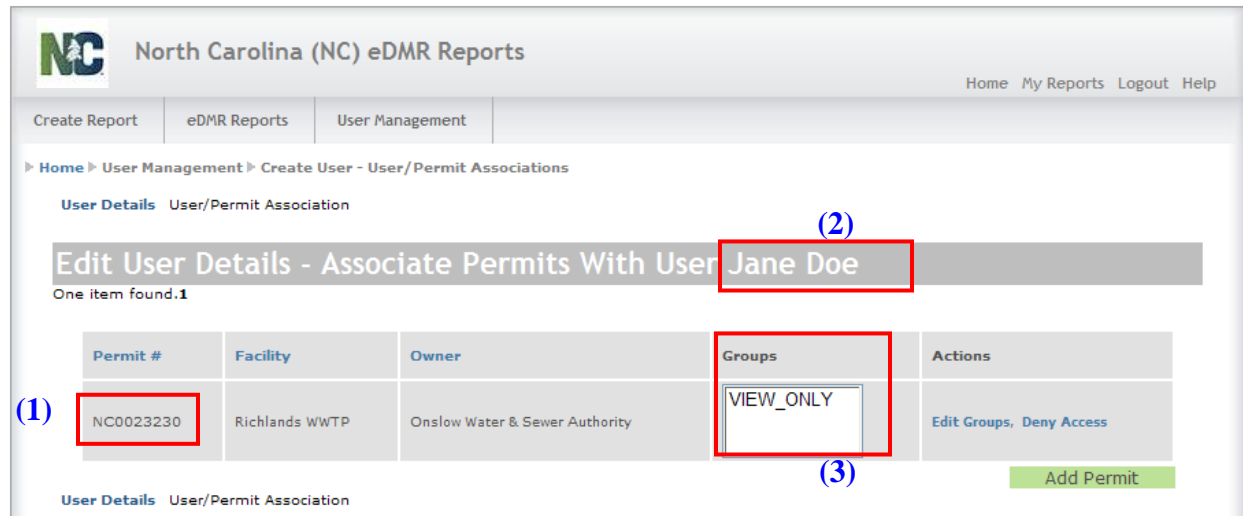
Adding additional privileges will be explained in the steps that follow.

2.4 Creating a Facility Administrator

To create a Facility Administrator, just assign the user to the Facility Administrator Group.

Note: Only the user with Owner permissions can add Facility Administrator privileges to a user account.

2.4.1 User Details – Associated Permits Screen

Each user is associated to one or more Groups which define the privileges or permissions this user has. Look at the *User Groups and Privileges Table* in Section 1.2.1 in this guide for a complete listing.

To make a user a "Facility Administrator" it is necessary to change the Groups to which the user is associated. This is done by clicking on the **(1) Edit Groups** link.

2.4.2   Select Groups Popup Window

Place a check mark in the box to the left of **(1) FACILITY_ADMIN** and click on the **(2) Submit** button. Only the Facility Owner has the ability to assign a facility user to the FACILITY_ADMIN Group. A facility administrator cannot assign another facility administrator to the FACILITY_ADMIN Group.
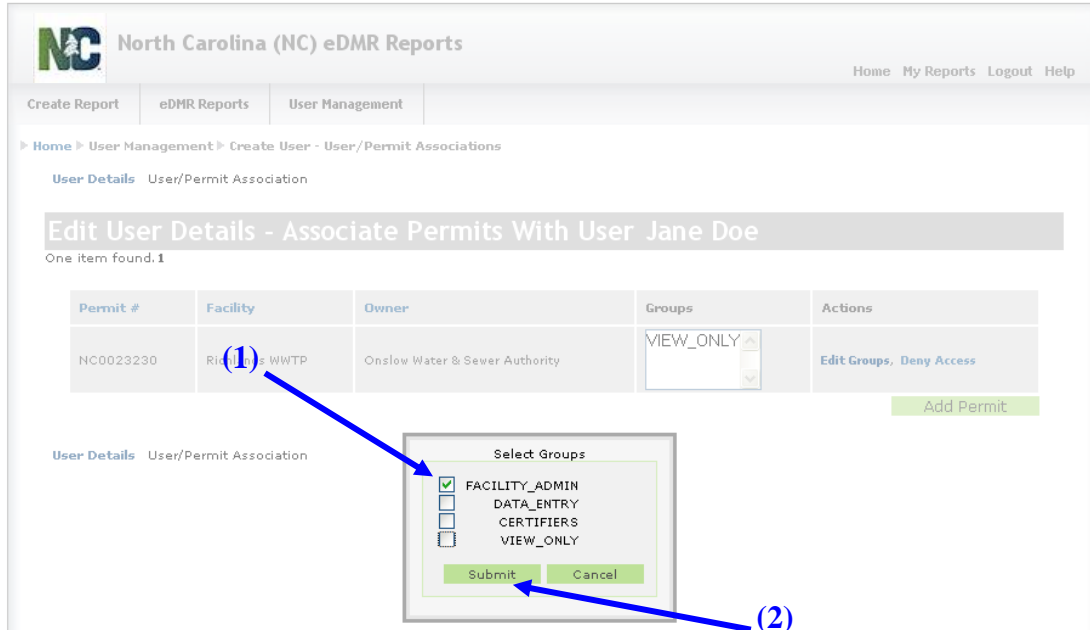
The user now has Facility Administrator privileges, as can be seen in the **(3) Groups** column.
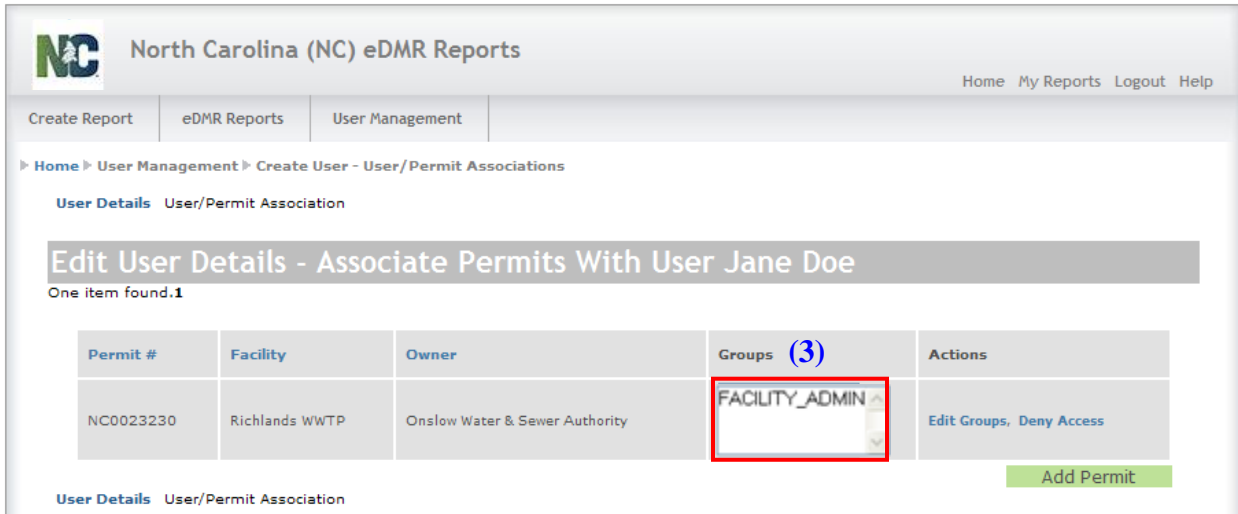
2.5   Managing User Privileges

Each User Group has certain privileges associated with it. Please refer to the *User Groups and Privileges Table* in Section 1.2.1 of this User Guide for detailed information.

Note: Facility Owners and Facility Administrators can manage user privileges. Only the user with Owner privileges can manage Facility Administrators. A Facility Administrator cannot manage users with Owner or Facility Administrator privileges. A Facility Administrator can only manage user accounts with Certify, Data Entry, and View Only privileges. Should an Owner or Facility Administrator encounter issues with accessing user accounts, they should contact the *NC eDMR Administrator* for assistance.

2.5.1   Groups Popup Window

The facility users will be created by either the Facility Owner or Facility Administrator and each user is assigned to Groups based on the privileges needed to perform their activities. Checking or removing the check for each group determines the privileges the user will have in the eDMR application.

In the example below, the facility user John Smith needs permission to perform data entry and certify reports for permit number NC0023230. To grant these privileges, check the boxes for **(1) DATA_ENTRY** and **(2) CERTIFIERS**.

The Group privileges are cumulative. If multiple Groups are selected for a user, the system will use the highest privilege. In the example below, if the user was assigned to both **(1) VIEW_ONLY** and **(2) DATA_ENTRY** Groups, the user would be able to not only view eDMR reports, but the Data Entry Group privileges includes creation and maintenance of eDMR reports.

Having VIEW_ONLY checked does not restrict the user from other associated group's privileges.

2.5.2   Associating the User with the Submitters Group

The Submitter is the person at the facility with signatory responsibility. This can be the Owner or any other facility user that has been delegated signatory authority by the Owner/Responsible Official. **Associating a user to the Submitters Group can only be performed by the *NC eDMR Administrator*.** If a new facility user is being created, this can be done by the Facility Administrator or Owner. The *NC eDMR Administrator* can also create the new user account if desired. Any user account, new or existing, that is requested to be given Submitter permissions must be done in writing along with the appropriate documentation (i.e. Electronic Signature Agreement). The *NC eDMR Administrator* should also be notified in writing when revocation of submitter privileges is warranted.

NOTE: Submitter users (i.e. those with electronic signature authority) will not be able to maintain their user account details or change their password via the User Management screen. Prior to changing any account information, the submitter user's identity must be verified when changing account details, resetting your password or changing security questions. Any time a submitter user changes account information, they will be required to change their password. Submitter user's must click the "Request Password Reset" on the login page or contact the NC eDMR Administrator at edmradmin@ncdenr.gov to request account changes.

2.6 Managing User Access

2.6.1 Deactivate User - Available Users Screen

When the user is added to eDMR the **(1) User Status** is Active. This active status allows the user to login to the system. To prevent the user from logging in to eDMR, change the status to Inactive by clicking **(2) Deactivate**.

When a user is deactivated, it still exists in eDMR but is Inactive.

Confirm Deactivate Popup Window

Click the **(1) OK** button to confirm deactivation.
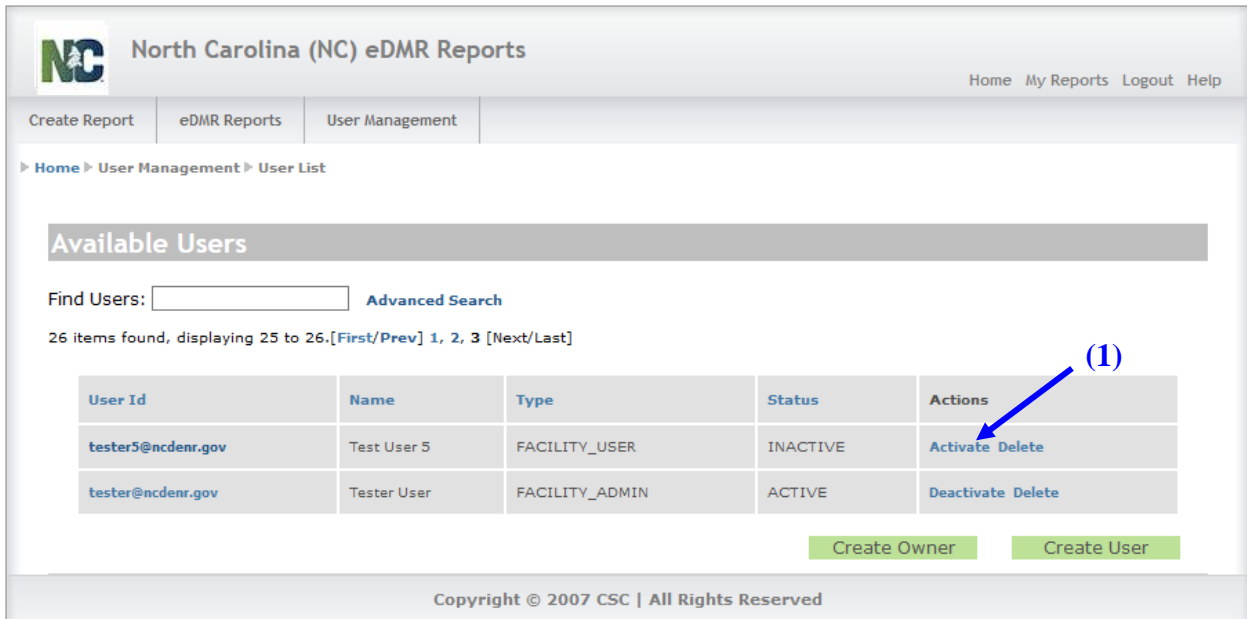
User Deactivation Confirmation Screen

Click the **(1) OK** button to confirm deactivation.
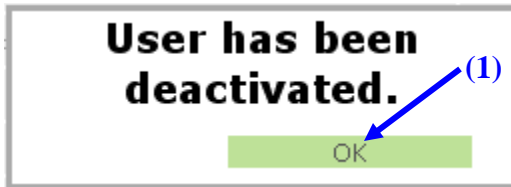
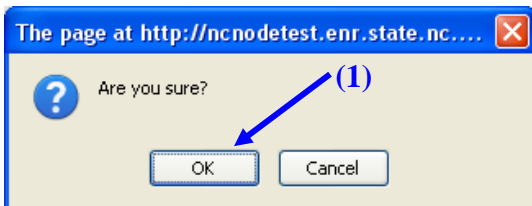The user will no longer be able to login to the eDMR system.

2.6.2   Reactivate User - Available Users Screen

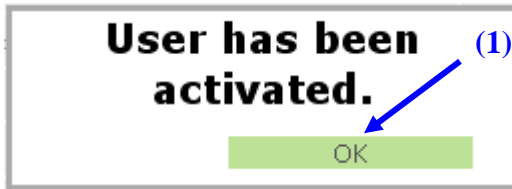To reactivate a user, click on **(1) Activate.** This will be a similar process to Deactivation.

Confirm Reactivate Popup Window

Click the **(1) OK** button to confirm reactivation.

**User Reactivation Confirmation Screen**

Click the **(1) OK** button to confirm reactivation.

The user will now be able to login to the eDMR system.

2.6.3 Delete User - Available Users Screen

To delete the user from eDMR click on **(1) Delete**. This will remove the user from eDMR lists. The user is still in the system. If the user has submitted any reports, the user will <u>not</u> be allowed to be deleted from the system.
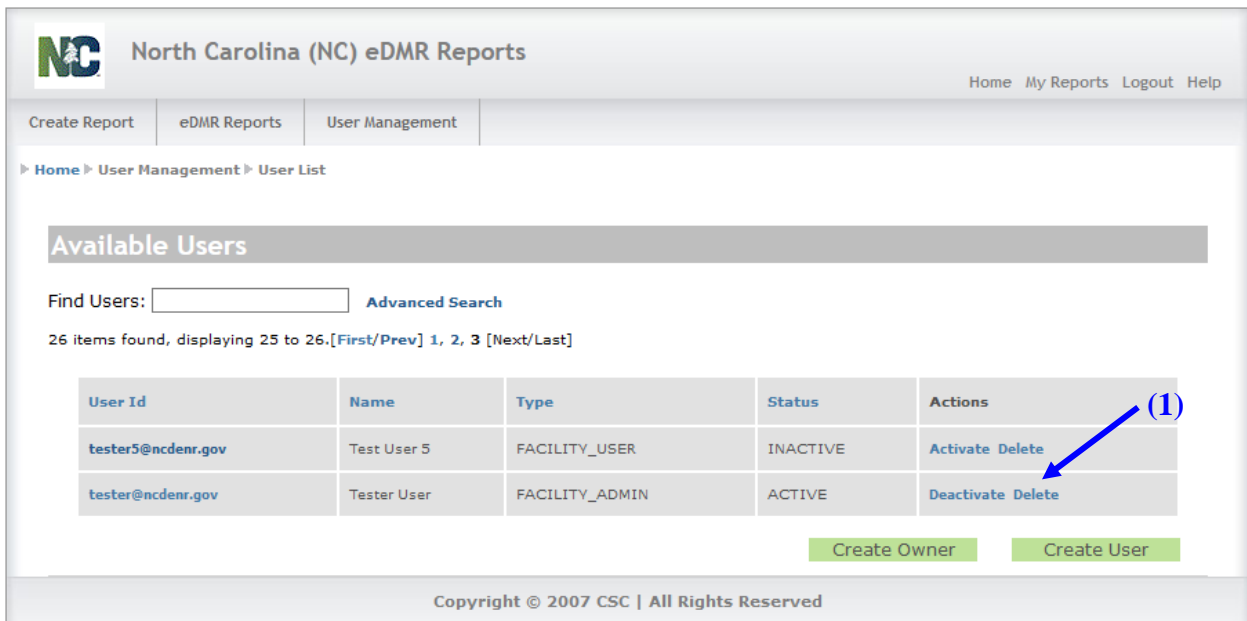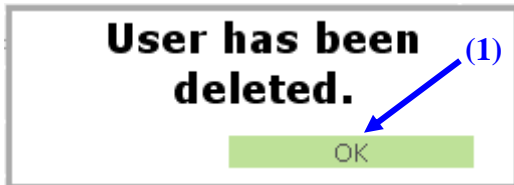

Confirm Delete Popup Window

Click the **(1) OK** button to confirm deletion.
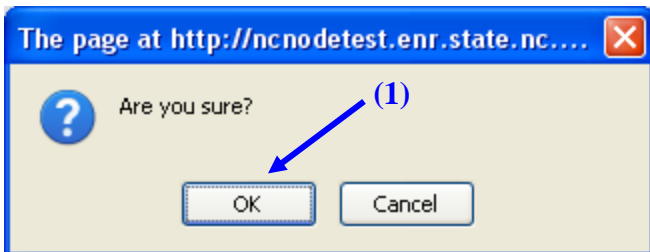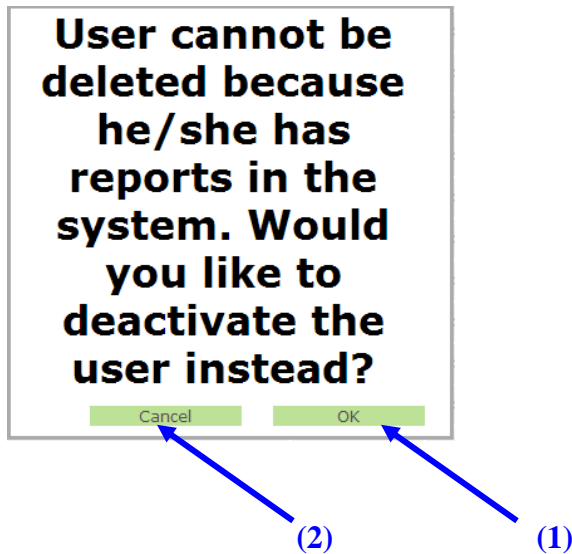
User Delete Confirmation Screen

Click the **(1) OK** button to confirm deletion.


The user has been removed from the eDMR system.

If the user has submitted any reports to eDMR, the user will <u>not</u> be allowed to be deleted from the system. The following message will popup. Click **(1) OK** to deactivate the user. The delete action will be cancelled if the **(2) Cancel** button is clicked.
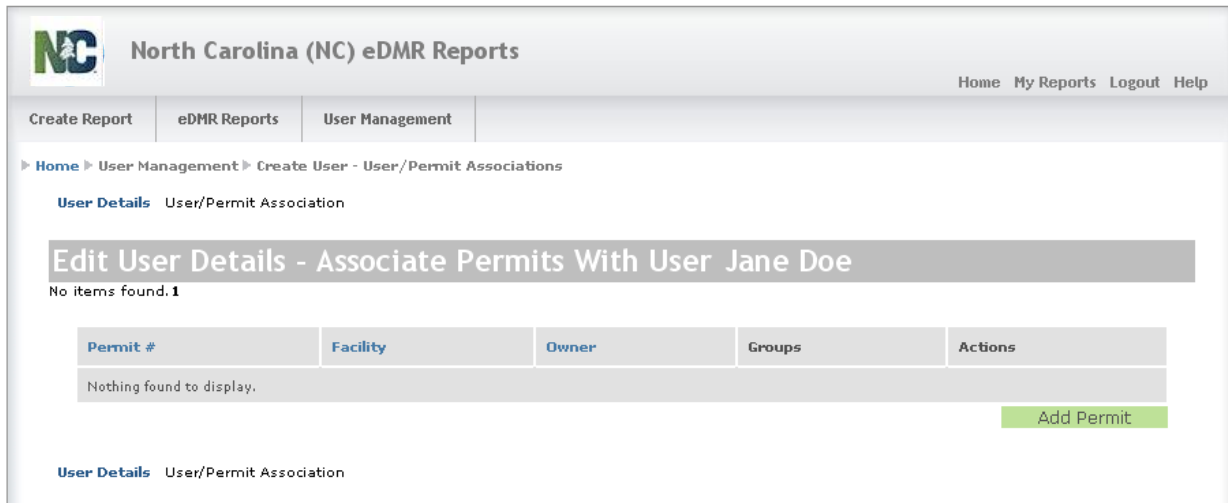
2.6.4 Deny Access to a Permit - Edit User Details Screen

From the Edit User Details Screen click on **(1) Deny Access.** This will disassociate the user with the permit. The user and permit still exist in the system, however, they are no longer associated to each other.
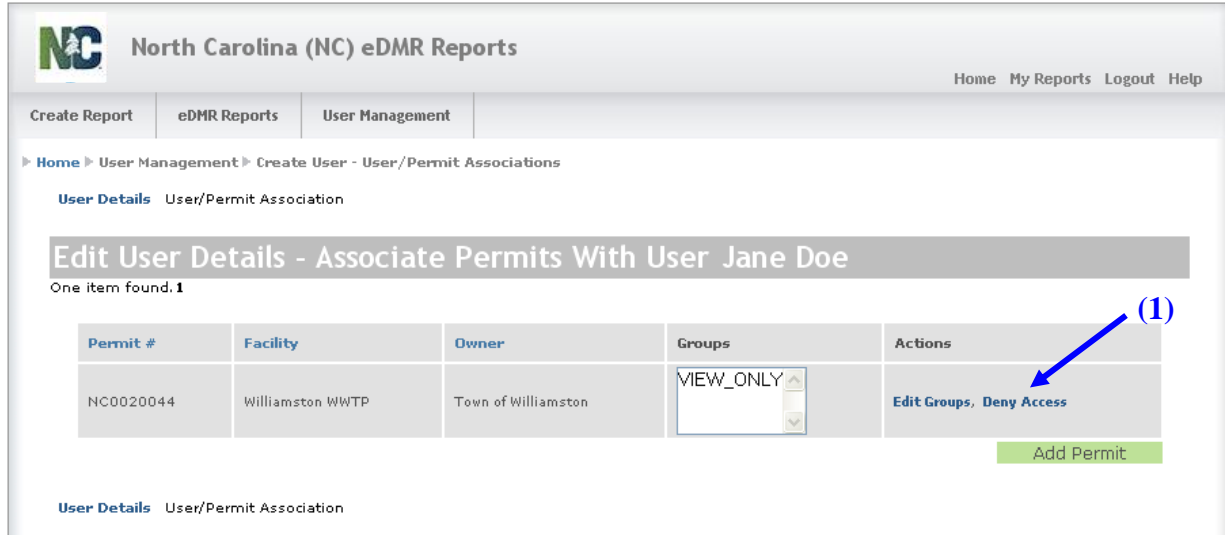
Edit User Details screen after action of Deny Access. There are no permits listed.

2.7   Updating User Account Details for Existing Users

The Facility Administrator can update the user details for non-submitter users only. Submitter users must contact the *NC eDMR Administrator*. The user's account details can be maintained in which manual changes can be made by the Facility Administrator. An existing users account can be maintained as follows.

2.7.1 Search for User Account

Select **(1) User Management** and then **(2) User List**.
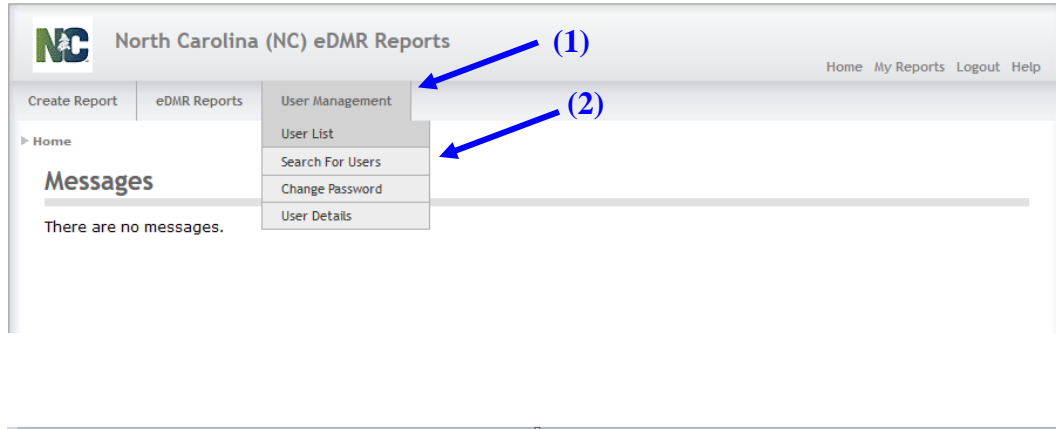
A list of users will appear from which the Facility Administrator can select a user account to manage. The user accounts that appear will be those that Facility Administrator will be able to manage only for those permits they have facility administrator permissions.

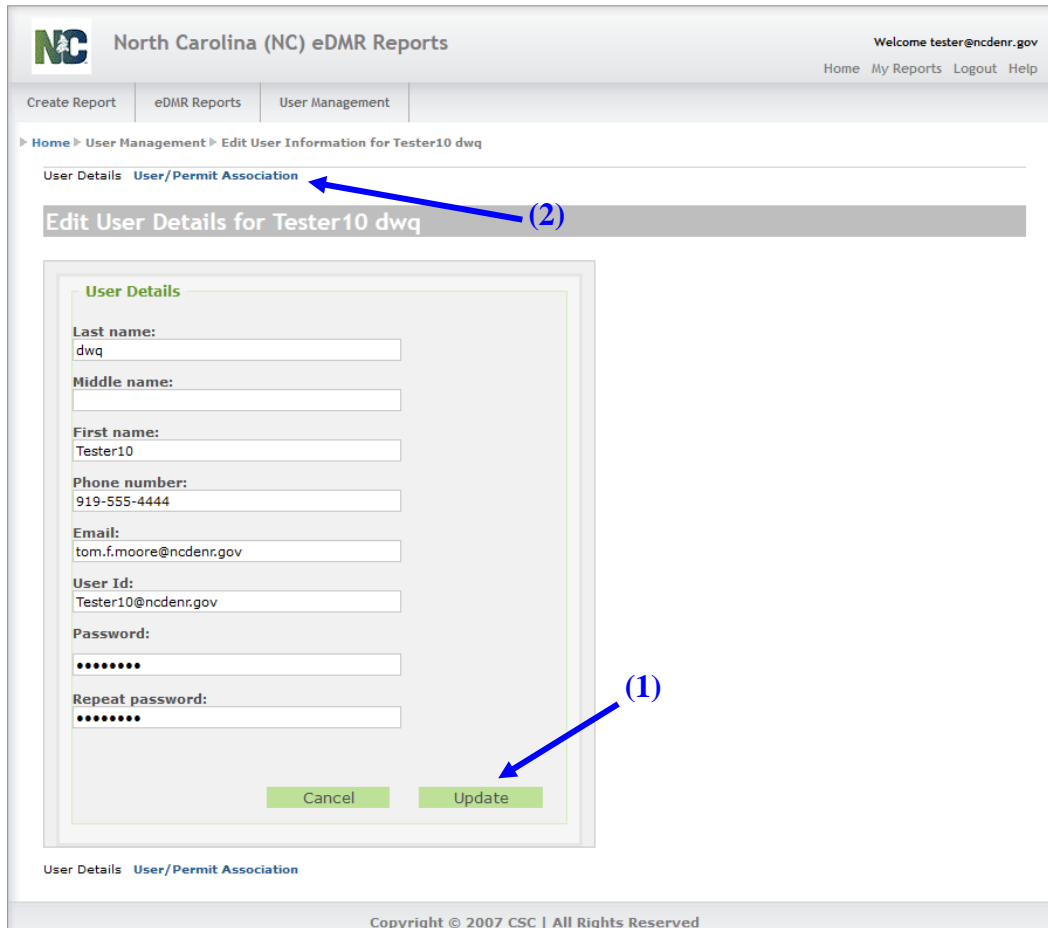### 2.7.2 Select User Account to Maintain

Click on the **(3) User ID** that you want to manage.
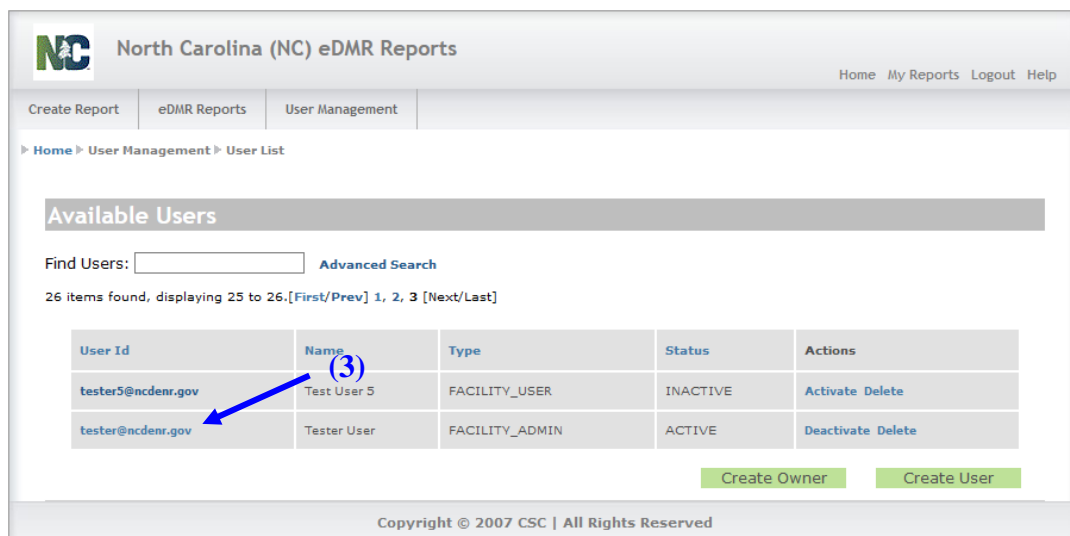
Selecting the User ID will open the User Details Screen.

2.7.3 Update User Details

Make any necessary changes to the user account details. Once changes are complete, click the **(1) Update** button to save the changes.

If any changes to the Permit Associations need to be made, this can be done by selecting the **(2) User/Permit Association** link which is detailed in Section 2.3. Updates to user privileges can also be found in Section 2.5.

2.8   Password Change by User

Facility users have the ability of changing their password at their discretion, except for submitter users.

NOTE: Submitter user's must click the "Request Password Reset" on the login page or contact the NC eDMR Administrator at edmradmin@ncdenr.gov to request a password change.

2.8.1   Menu Item Screen

To change the password go to the **(1) User Management** tab, then click on the **(2) Change Password** menu item.

When a Submitter user selects the "Change Password" option, the following message will be displayed at the top of screen.

The submitter user will be able to view their Security Questions and Answers on the screen below the above message.

2.8.2   Change Password Screen

Passwords must consist of at least eight (8) characters in length and must include at least one (1) uppercase letter, at least one (1) lowercase letter, and at least one (1) number. Passwords cannot be re-used.

NOTE: There is no limit on failed login attempts for non-submitter users. However, users with submitter permissions will receive a warning after three (3) failed attempts to log in and the account will be locked after five (5) failed attempts.

Type in the **(1) Current Password**, the **(2) New Password** in both fields, then click **(3) Submit**.
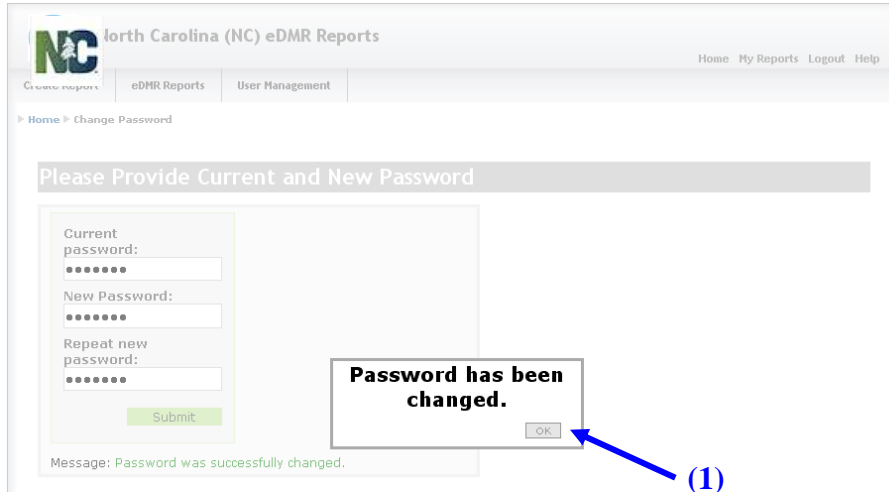
2.8.3 Password Change Confirmation Popup Screen

A confirmation screen is displayed that the password has been changed. Click the **(1) OK** button to proceed. The user will be returned to the Login Screen in which they can then proceed with logging into the system using the new password.

2.9   Forgotten Password

### 2.9.1   Login / Forgot Password Screen

There are two options available to a user, retrieve forgotten password or resetting the password.

Users can retrieve forgotten passwords by clicking on Forgot Password or get the password reset by clicking on Request Password Reset. *This option only applies to non-submitter users*.

To retrieve the forgotten password click on **(1) Forgot Password.**
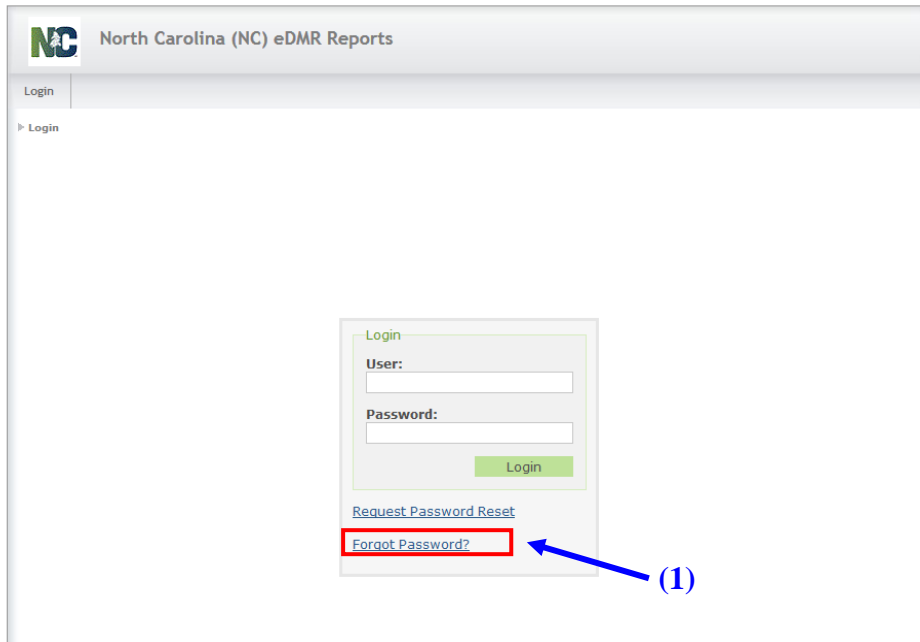
2.9.2   Provide User ID Screen

The user must supply their **(1) User ID** and click the **(2) Submit** button.

If the user selected 'Forgot Password', the eDMR application will send an automatic email containing the user's current password to the email address specified on the user's account profile. This option only applies to non-submitter users.

If the user ID entered belongs to a user with submitter permissions, the following will be displayed. The submitter user will need to request a password reset or contact the *NC eDMR Administrator* at edmradmin@ncdenr.gov.

2.9.3   Email Containing Current Password

The user will receive an email with their password. This option is <u>**only**</u> available to non-submitter users. Submitters will be required to reset their password should they forget their current password.
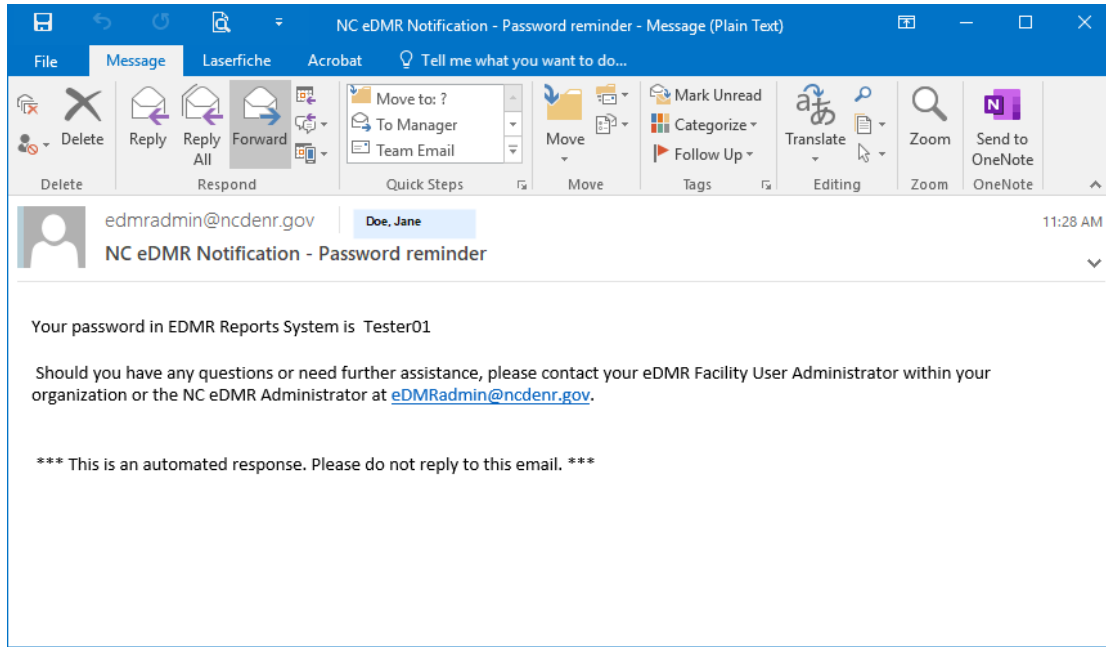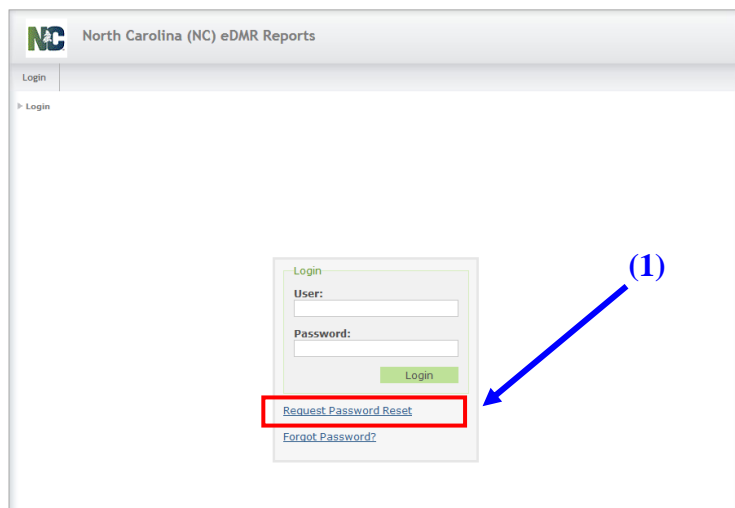

2.10   Request Password Reset

All password reset requests made using the 'Request Password Reset' option on the login screen will be sent to the *NC eDMR Administrator*.
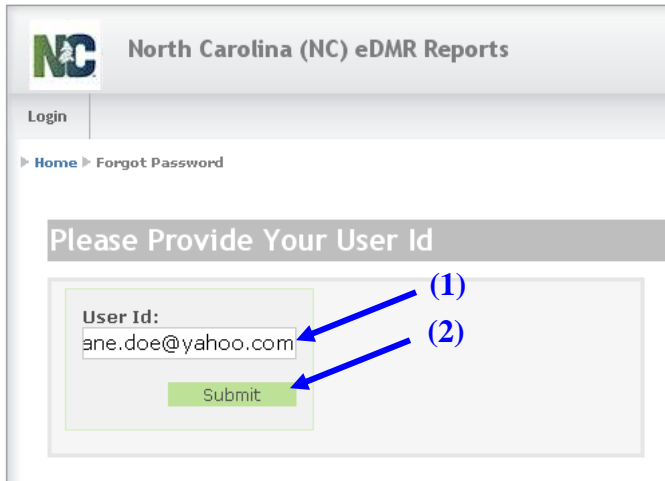
2.10.1 Request Password Reset Screen

The user can request that the password be reset by clicking on **(1) Request Password Reset**.

2.10.2 Provide User ID Screen

The user must supply their **(1) User ID** and click the **(2) Submit** button.

The system will automatically send an email to the *NC eDMR Administrator* requesting a password reset. Non-submitter users may also contact their Facility Administrator directly for assistance with a password reset.

2.10.3 Password Reset Request Email to the NC eDMR Administrator

Upon receipt of the email for the password reset request, the *NC eDMR Administrator* will perform the password reset and the user will be notified. Should the request come from a Submitter user, additional steps will be required by the *NC eDMR Administrator* to verity the requestors identity.

2.10.4 Password Reset Confirmation Notice Screen

The user will see the message that a **(1) Password reset request** was sent to the administrator. This request will be sent to the *NC eDMR Administrator*.
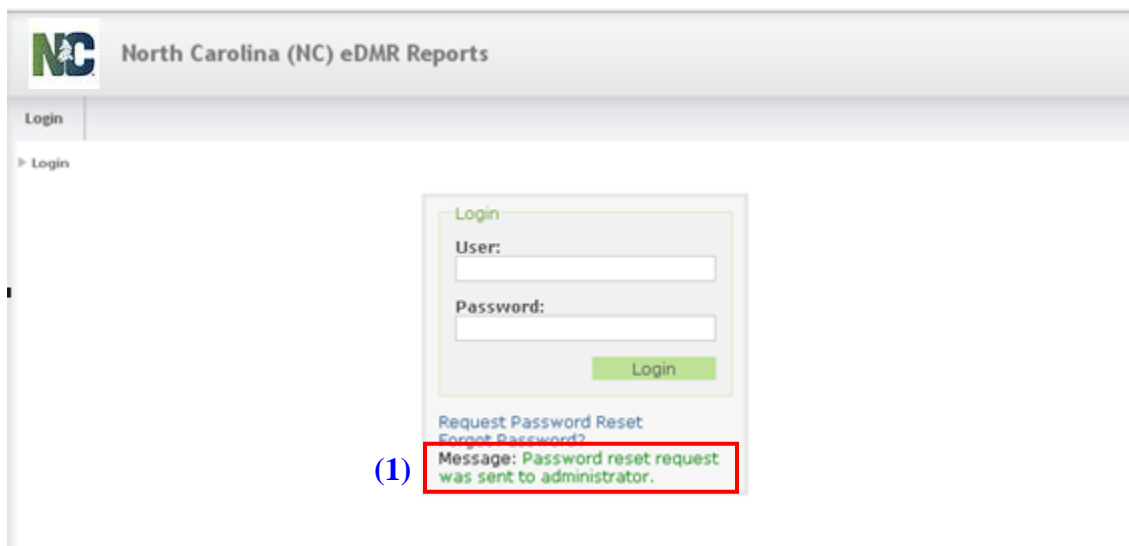
2.11 Manual Password Change by Facility Administrator

All password reset requests made using the 'Request Password Reset' option on the login screen will be sent to the *NC eDMR Administrator*. However, non-submitter users may contact their Facility Administrator for a password reset. Facility Administrators can maintain non-submitter users account details and manually change the password. When the password is changed by the Facility Administrator, there are two ways to find the user's profile information, generating a list of users or performing a search for a user.

2.11.1 User List Menu

User list provides a list of all users for that facility. This will probably be the easiest way since a facility will usually only have a page or two of users. Select **(1) User Management**, then **(2) User List.**
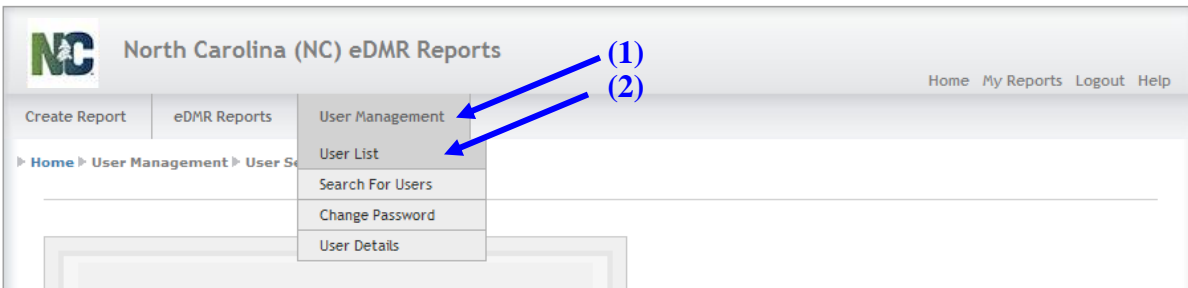
2.11.2 Available Users List Screen

This display shows there are multiple users, besides the Owner, that have been created for this facility/permit. Click on the **(1) User ID** to bring up the User Details screen for that user.
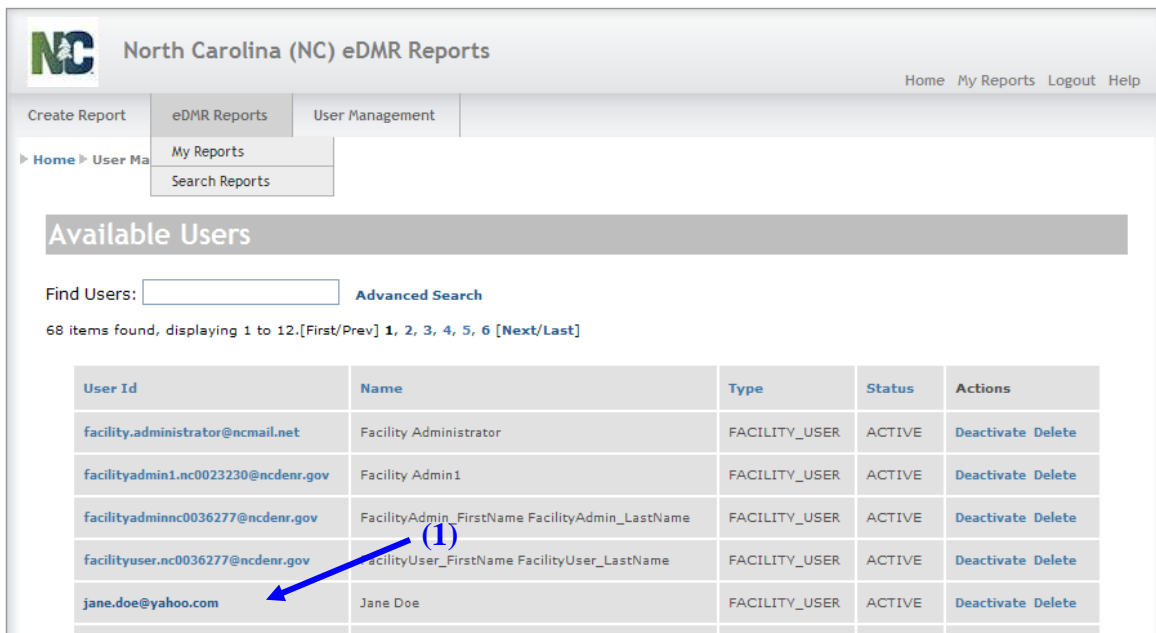
2.11.3 Edit User Details Screen

A Facility Administrator can change the password of a non-submitter user for their permits. To do so, a Facility Administrator can manually change the **(1) Password** on the Edit User Details screen for a **(2) User**. The new password must satisfy the following requirements:

- **Consist of at least eight (8) characters**
- **Include at least one (1) uppercase letter**
- **Include at least one (1) lowercase letter, and**
- **Include at least one (1) number.**

Once the password has been changed, the Facility Administrator must then provide the password to the user.

NOTE: Non-submitter users should rarely need a password reset as they can request their password be sent to them via email by selecting the "Forgot Password" option on the login screen as detailed in Section 2.9.

2.12 Password Reset by *NC eDMR Administrator*

All password reset requests made using the 'Request Password Reset' option on the login screen will be sent to the *NC eDMR Administrator*. This option is available to any user when a Facility Administrator is not available to complete the password change for the facility user.

2.12.1 User Password Change Screen for Non-Submitter User

For any reset requests performed by the *NC eDMR Administrator*, the user will receive a temporary password via email. Upon receiving the temporary password for a non-submitter user, the user will be prompted to change the password in the change password screen.

Enter the temporary password indicated in the password reset email that was received from the *NC eDMR Administrator* into the **(1) Current password** field, then pick a new password meeting the password requirements provided on the screen and enter it into the **(2) New Password** field.

NOTE: Passwords consist of at least eight (8) characters, including at least one (1) uppercase letter, at least one (1) lowercase letter, and at least one (1) number. A new password cannot be a previously used password.

Once the password has been changed, press the **(3) Submit** button. If your entries meet all requirements for entry and the update is successful, the user will be returned to the login screen and will indicate "Password was successfully changed" in the message field at bottom of login box.

The user can then login to system using the new password just created.

2.12.2 User Password Change Screen for Submitter Users

When a Submitter user requests a password reset, they will see a slightly different change password screen. In addition to the change password fields, the 5 security questions associated to the account will also be provided. The questions do not need to be reselected if only changing the password. However, if the user wants to change any or all of their questions/answers, they may do so as provided on the screen.

Please change your Current Password. If a temporary password has been provided, please enter it as the current password.

Passwords must be:
* at least 8 characters in length
* contain at least one(1) Uppercase letter
* contain at least one(1) Lowercase letter
* contain at least one(1) number

Current password:

New Password:

Repeat new password:

Please select your security questions for a new account or make changes for existing account, if needed.

Security Questions/Answers must meet the following requirements:
* cannot have multiple selections of same question
* answer must be at least 3 characters in length
* answer can only be used once for a single question

Question #1:
What is your favorite book?

Answer #1:
111

Question #2:
What is the first and middle name of your oldest siblin

Answer #2:
222

Question #3:
What is your favorite vacation destination?

Answer #3:
333

Question #4
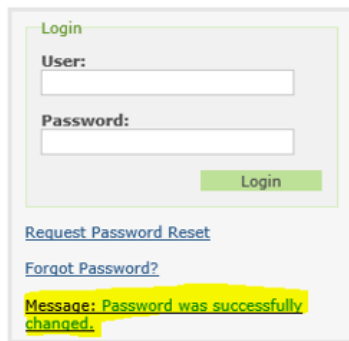What year and model (yyyy-name) was your first car?

Answer #4:
444

Question #5:
What is your favorite TV show?

Answer #5:
555

Submit

Once the password has been changed, and changes made to security question/answers if applicable, press the Submit button. If your entries meet all requirements for entry and update is

successful, the user will be returned to the login screen which will indicate "Password was successfully changed" in the message field at the bottom of the login box.


The user can then login to the system using the password just created.

NOTE: If the user is not returned to the login screen after completion of the entry of a new password and security questions, the changes were not successful and the user should log in again using their temporary password and retry the password reset. If the user continues to have issues with a password change, they should contact the NC eDMR Administrator immediately for assistance.

2.13 User Account Update Confirmation Email

Whenever a change is made to a user's profile, the user will get an email notification that a change has been made.
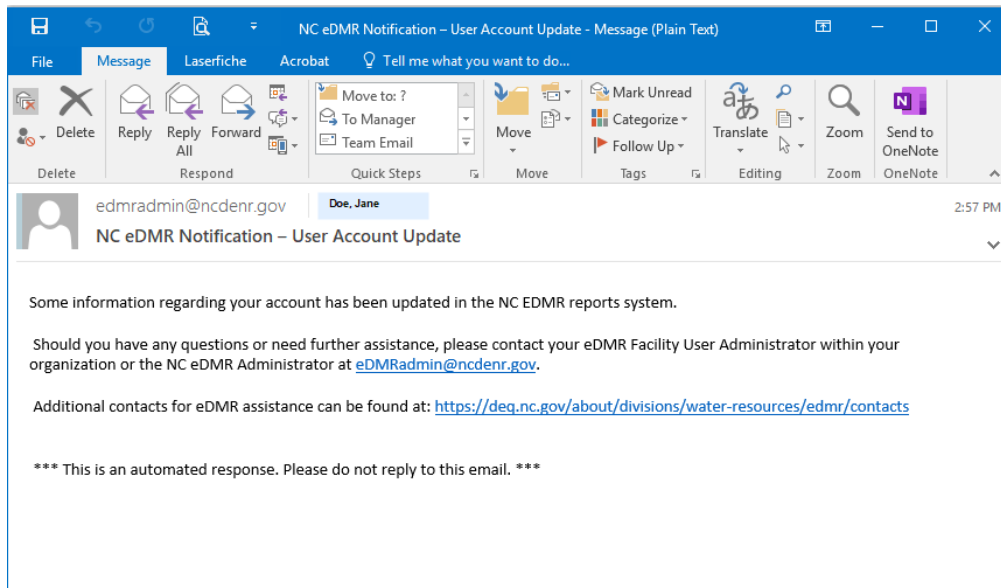
After receiving this email notification the user should login and view their user information profile to see what has been changed.

Section 3.   Support

If you need help or have any question related to eDMR, do not hesitate to contact DWR as specified below.

- Send an e-mail to **Technical Support** at **denr.dwq.edmr.help@lists.ncmail.net**

  - or -

- Send an e-mail to **eDMR Administrator** at **edmradmin@ncdenr.gov**

  - or –

- Call **(919) 707-3681** and ask for **Information Processing Unit Staff**.