CMDP Read Only Role Guide Documentation

Registration and Usage Information for Read Only Role
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v1.0

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1 Background

The Read Only role was created to allow additional parties such as CMDP administrator or Lab Quality Assurance personnel to view active, pre-certified Lab or Water System records without the ability to modify them. These Ready Only roles for the State Lab Read Only, Private Lab Read Only, and PWS Read Only access rights are nested within their respective groups. The purpose of this document is to provide guidance for the use of this role to the CMDP Community.

2 Registration

Registration for the Read Only role can be accomplished by either: PWS or Lab Administrator initiating a pre-registration sequence (similar to a PWS/Lab Administrator pre-registering a Certifier/Reviewer/Preparer role), or by requesting sponsorship. The following section steps through the process of requesting sponsorship of a new user.

2.1 Private/State Lab and PWS Read Only Registration Sequence

New Registration

Steps 1-9: As shown in Figure 1, the registrant for a Private/State Lab and PWS Read Only role follows a registration sequence that is common to all open registration roles by going to the SCS Home Page, selecting the Partner, Program and Role, accepting the Terms and Conditions and Privacy Policy, completing the Account Profile including security questions, username and password, completing the Organization Information screen, receive a Verification E-mail with Verification Code, and submit the Verification Code to SCS. Screen shot examples for all of these steps are shown in the above registration sequences. In the example in Figure 2 below, the registrant is requesting a role as a Private Lab Read Only role in the X1 test agency.

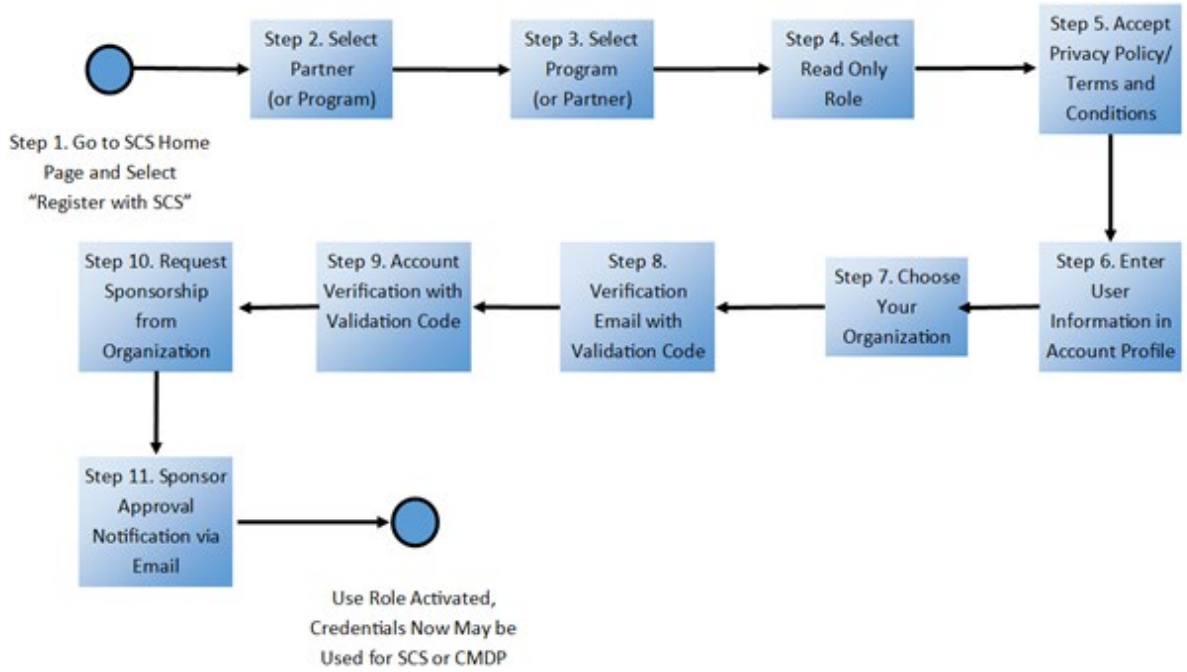


Figure 1 - SCS Registration Sequence for Lab and PWS Read Only

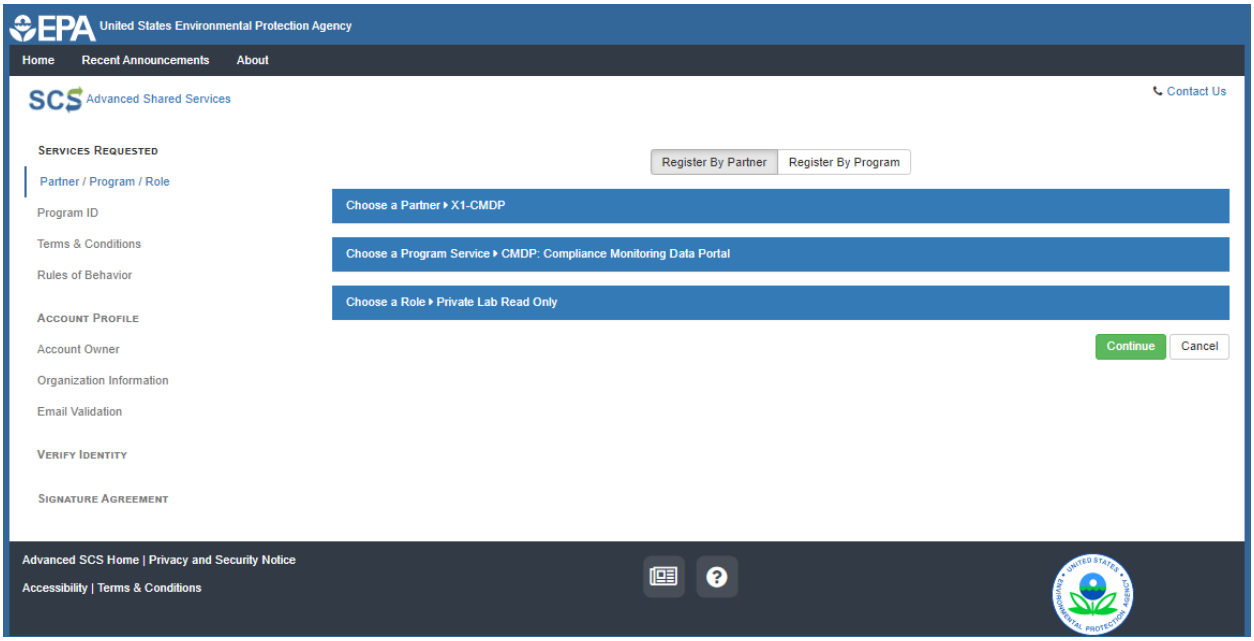


Figure 2 - Lab Read Only Partner-Program-Role Section

Step 10. As noted in user guide section 1.3, an important difference in the registration sequence for non-administrative roles compared to administrative roles is the need for sponsorship. The Read Only roles require sponsorship. For example, a private lab Read Only, which is a non-administrative role, must be sponsored by a Private Lab CMDP Administrator. As a result, after completing the Validation Code Entry Form in Step 9, the registrant must use the Sponsor Information web form to request sponsorship from the CMDP Administrator for his or her Organization (Figure 3). In the fictional example below, the Private Lab Read Only populates the e-mail address of the sponsor and confirms the e-mail address. Both fields must match for the registrant to continue the registration sequence.

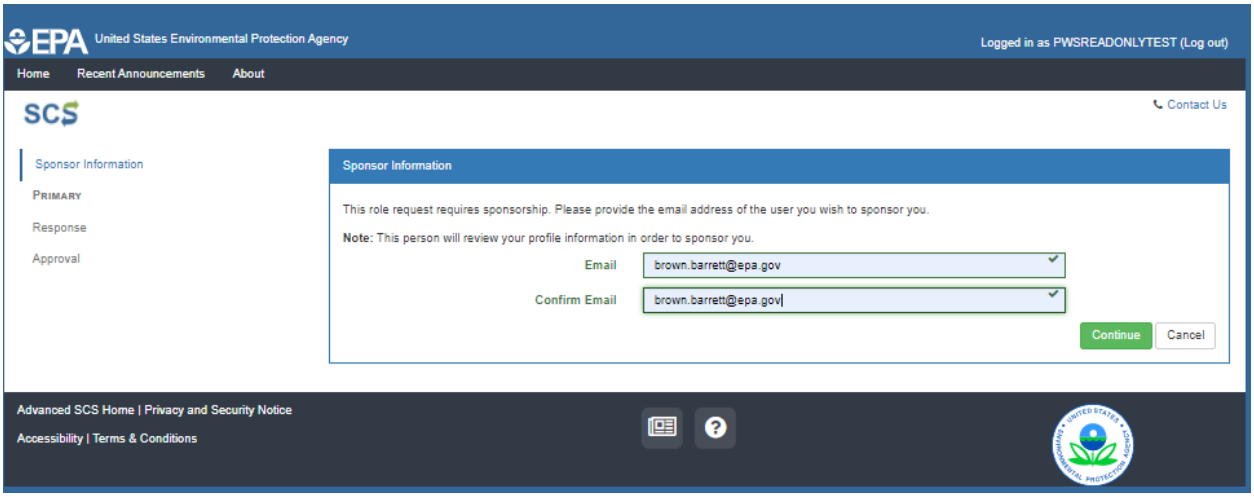


Figure 3 - Sponsorship Request

After selecting the Continue button, the registrant may view the status of their role registration in the SCS Dashboard (Figure 4), and they also will receive an e-mail from SCS (Figure 5). Concurrently with the

registrant, the Lab CMDP Administrator for the organization (in this example, X1 Test - Lab) will receive an e-mail notification (Figure 6).

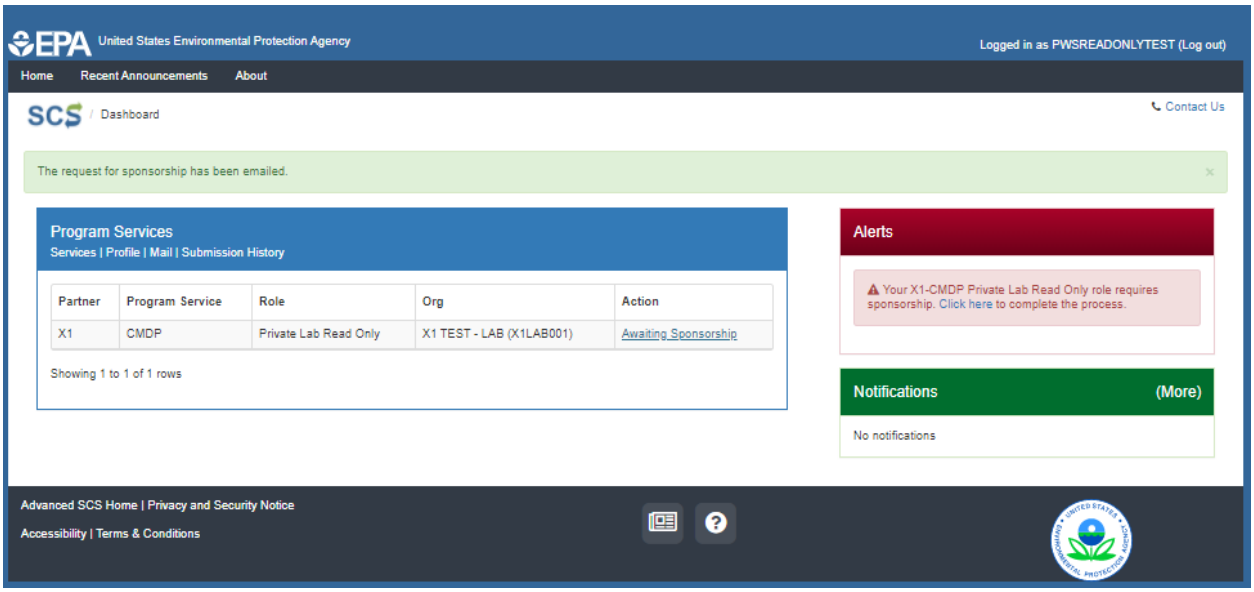
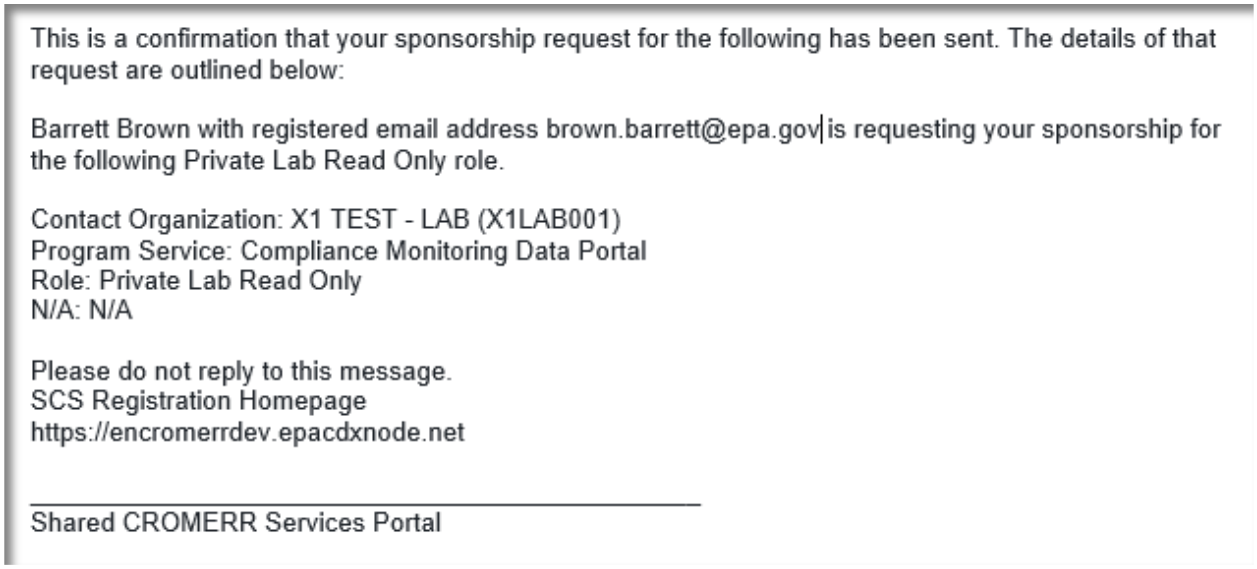


Figure 4 - Lab Read Only View of Sponsorship Status in SCS Dashboard



This is a confirmation that your sponsorship request for the following has been sent. The details of that request are outlined below:

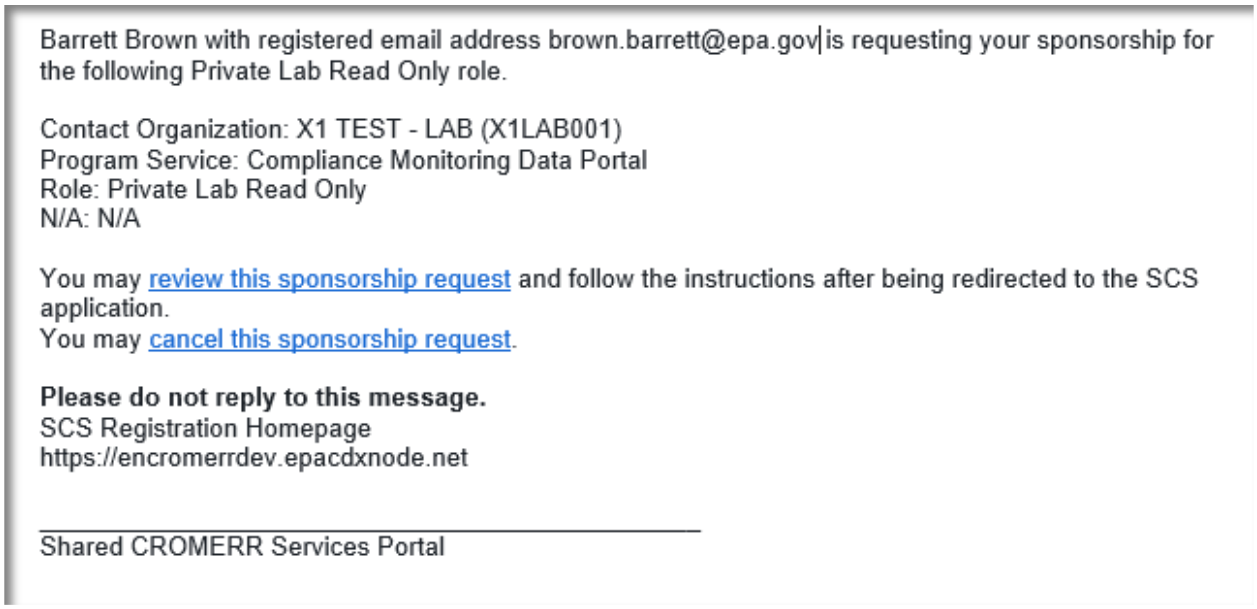
Barrett Brown with registered email address brown.barrett@epa.gov is requesting your sponsorship for the following Private Lab Read Only role.

Contact Organization: X1 TEST - LAB (X1LAB001)
Program Service: Compliance Monitoring Data Portal
Role: Private Lab Read Only
N/A: N/A

Please do not reply to this message.
SCS Registration Homepage
https://encromerrdev.epacdxnode.net

Shared CROMERR Services Portal

Figure 5 - Sponsorship Request Notification Email



Barrett Brown with registered email address brown.barrett@epa.gov is requesting your sponsorship for the following Private Lab Read Only role.

Contact Organization: X1 TEST - LAB (X1LAB001)
Program Service: Compliance Monitoring Data Portal
Role: Private Lab Read Only
N/A: N/A

You may review this sponsorship request and follow the instructions after being redirected to the SCS application.
You may cancel this sponsorship request.

Please do not reply to this message.
SCS Registration Homepage
https://encromerrdev.epacdxnode.net

Shared CROMERR Services Portal

Figure 6 - Sponsorship Request Email to Sponsor

Step 11. Next, the Lab CMDP Administrator (Sponsor) must log into SCS, and check for Pending Requests from the SCS Dashboard. Once the Sponsor logs into SCS and approves the role, in this case, a Preparer for Portland Water Bureau, the role will be activated, and the user will see the Preparer role as "active" in his or her SCS Dashboard, as in the example in Figure 7.

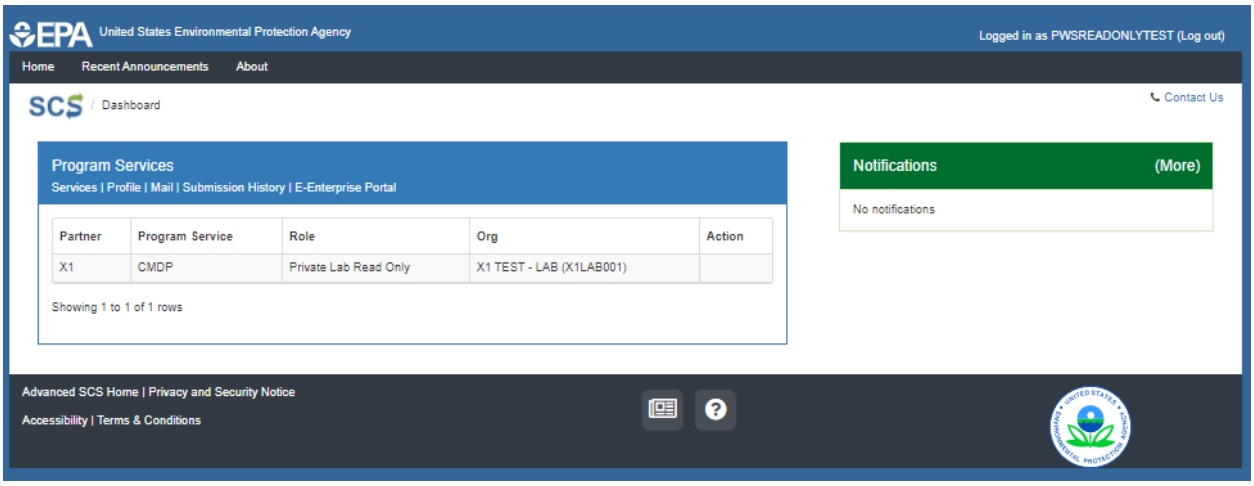


Figure 7 - Successful Read Only Role Activation

3 Usage

The Read Only role is intended to provide the user the ability to view all of the data for the organization they are registered with, but not make any additions/edits/removals to that data.

3.1 Home Page

When the user logs into CMDP with a Read Only role, their initial view will be the Home page with all four dashboards available: My Laboratories, Profile Change Request (Submitted to State), My Work in Progress, and Submissions (to State) (Figure 8).

It should be noted that the user with the Read Only role can see job data that is in statuses ranging from Draft with Preparer to Accepted by State. For example, if the Read Only role has been granted to a State CMDP Administrator, the user is now able to see all jobs when viewing data, whereas with the State CMDP Administrator role they can only see jobs with a status of Submitted and Accepted by State.

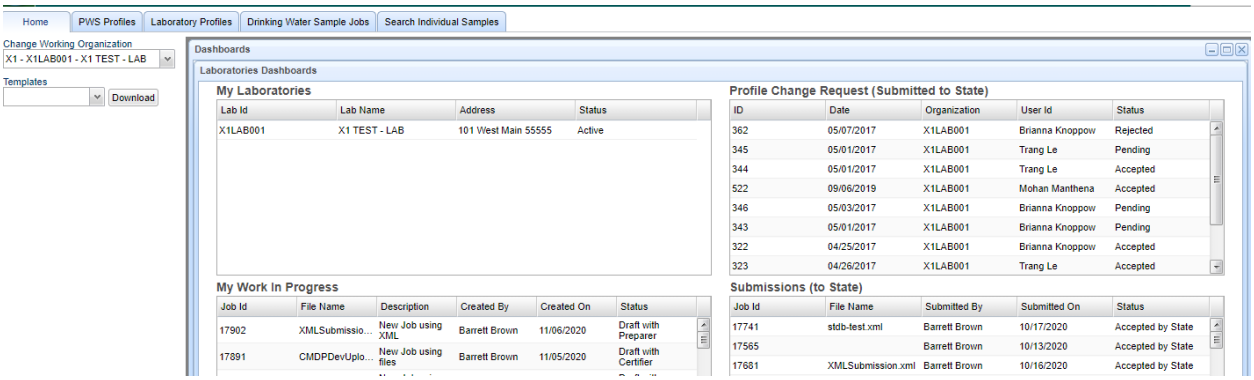


Figure 8 - Lab Read Only, Dashboards

As is standard with PWS Roles, the Laboratory Profiles tab will not be available for a user with the PWS Read Only role.

3.2 Laboratory Profiles/PWS Profiles

When the user clicks on the PWS Profiles tab, the My Water System(s) list will display the same list of system(s) as is available for other roles for the Lab or PWS the user is registered with. If the user is registered to a Lab, all water systems available for that Partner will be available If the user is registered to a PWS, only that specific water system will be available(Figure 9).

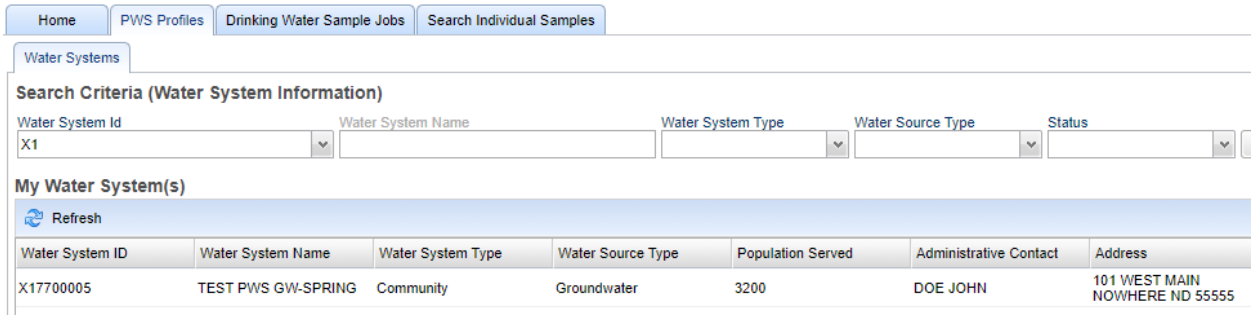


Figure 9 - PWS Read Only, My Water System(s) List

If a PWS Read Only user clicks on their water system, on the Water System Profile page, the link to add a new Profile Change request will not be available (Figure 10).

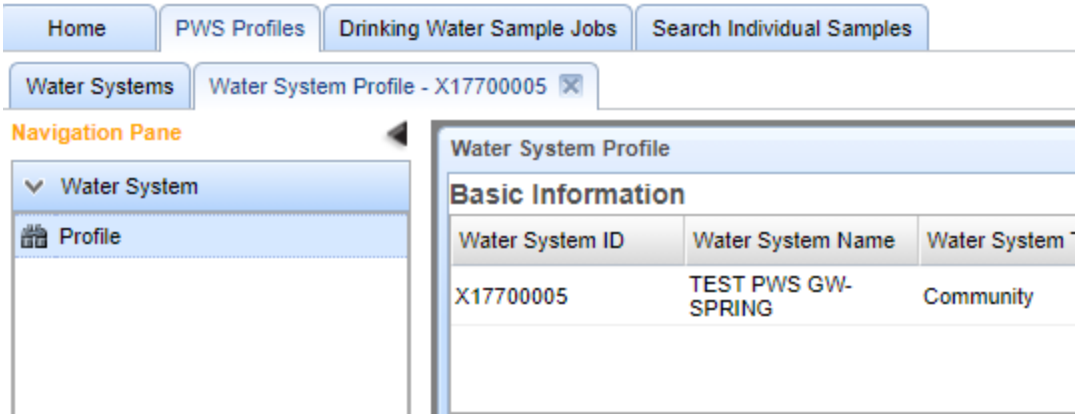


Figure 10 - PWS Read Only, Profile Change Request Unavailable

This behavior is the same for a Lab Read Only role.

3.3 Drinking Water Sample Jobs

When a user with the Read Only role clicks on the Drinking Water Sample Jobs tab, they will be presented with a page that is very similar to the view the State CMDP Administrator would typically see. In this role, jobs of all statuses are displayed and is not limited to jobs in the status of Submitted or Accepted by State (Figure 11).

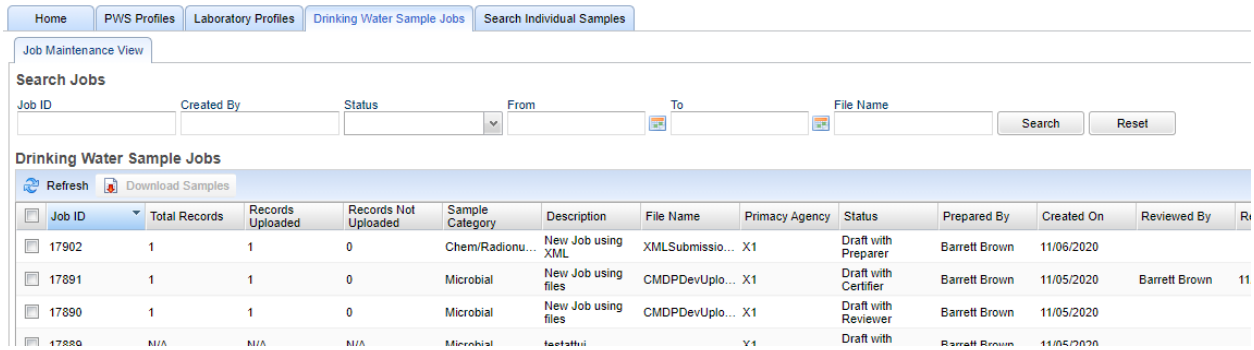


Figure 11- Lab Read Only, Drinking Water Sample Jobs

The only two buttons that will be available to the user are “Refresh” and if a job with a status of Submitted or Accepted by State is selected, then the “Download Samples” button will be available. The buttons to create new jobs, promote jobs, or remove jobs are not available.

If a user clicks on a job, they will be presented with the Job Summary View tab which has the following sub-tabs: Sample Result, Operational Data, Job History, Validations, Attachments, and Composite Samples (Figure 12).

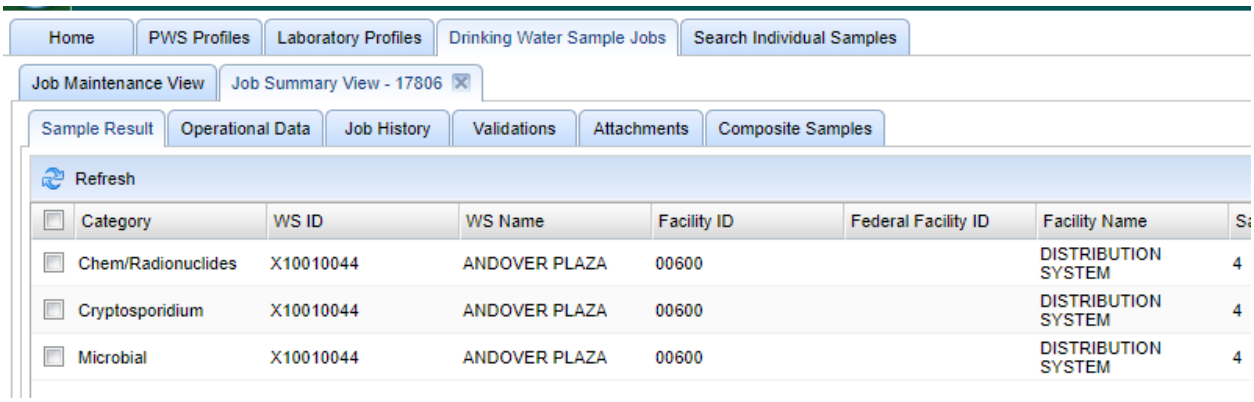


Figure 12 - Lab Read Only, Job Summary View

3.3.1 Individual Sample Results (Chem/Rad, Microbial, Cryptosporidium)

When a user clicks on a specific sample in the Sample Result list, they will see the details of the sample/sample result, but all of the Add/Remove/Save buttons have been disabled, preventing any edits to the job (Figure 13).

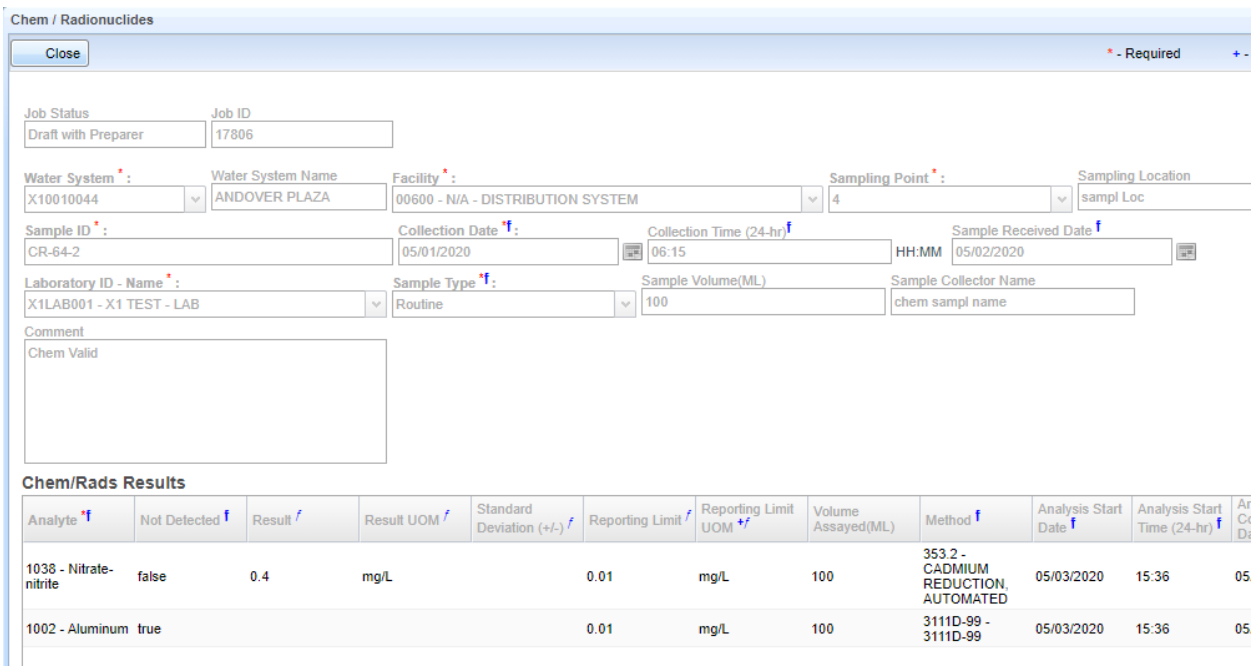


Figure 13 - Lab Read Only, Chem/Rad Sample Results

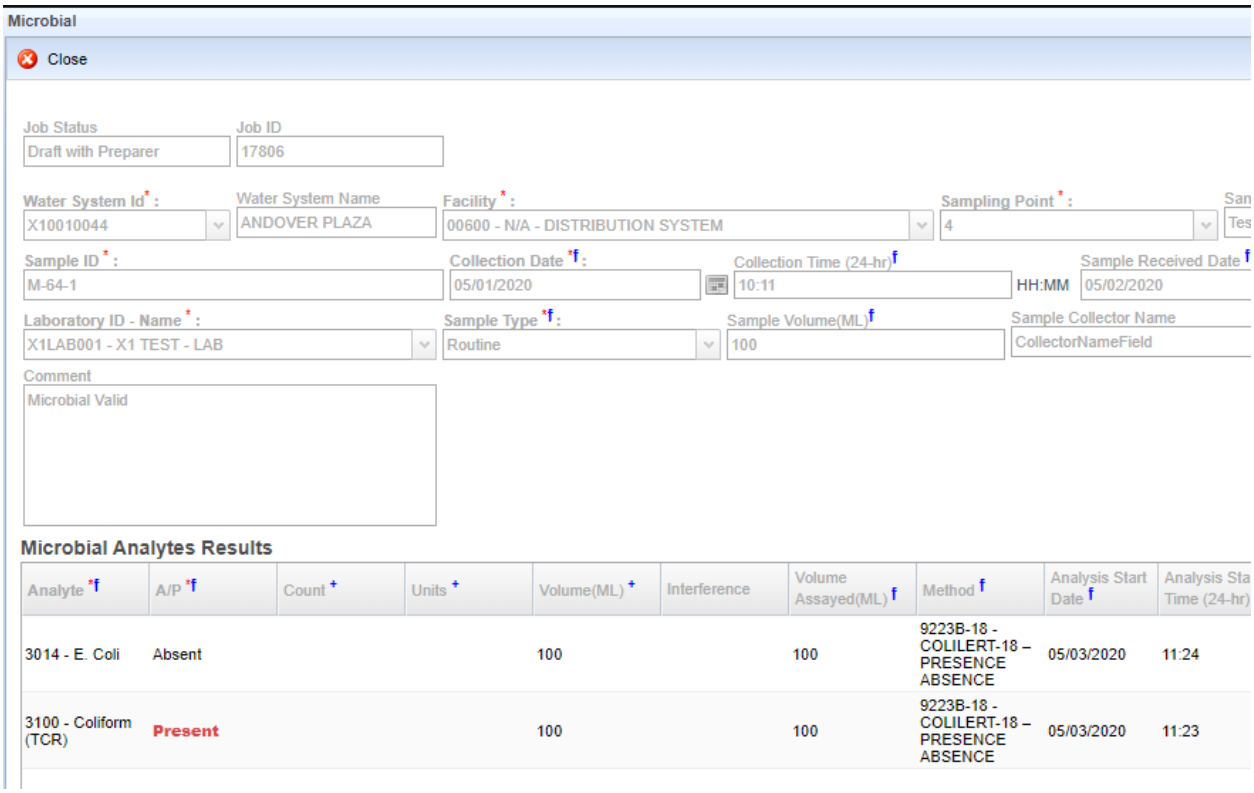


Figure 14 - Lab Read Only, Microbial Sample Results

Cryptosporidium results will follow the same style as the Microbial and Chem/Rad where all of the data is visible, but there are no buttons available except the "Close" button.

3.3.2 Validations

When a user clicks on the Validations tab, they will be able to see any validation errors associated to the job. This visibility will allow a State CMDP Administrator, who has been granted Read Only access to a Lab, to assist the lab personnel in reviewing and correcting validation errors (Figure 15).

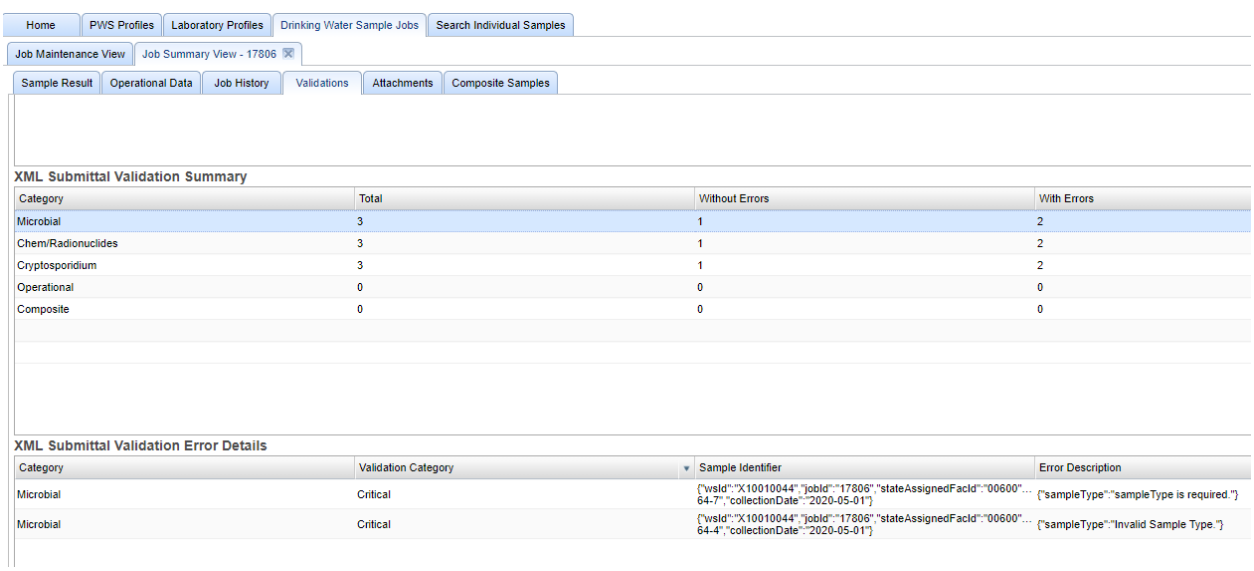


Figure 15 - Lab Read Only, Validations

3.3.3 Attachments

When a user clicks on the Attachments tab, they will be able to see any attachments associated to the job and download them, but they will not be able to add/remove any attachments (Figure 16).

Figure 16 - Lab Read Only, Attachments

3.3.4 Individual Operational Data Results

When a user clicks on a specific result in the Operational Data list, they will see the details of the operational data, but all of the Add/Remove/Save buttons have been disabled, preventing any edits to the job (Figure 17).

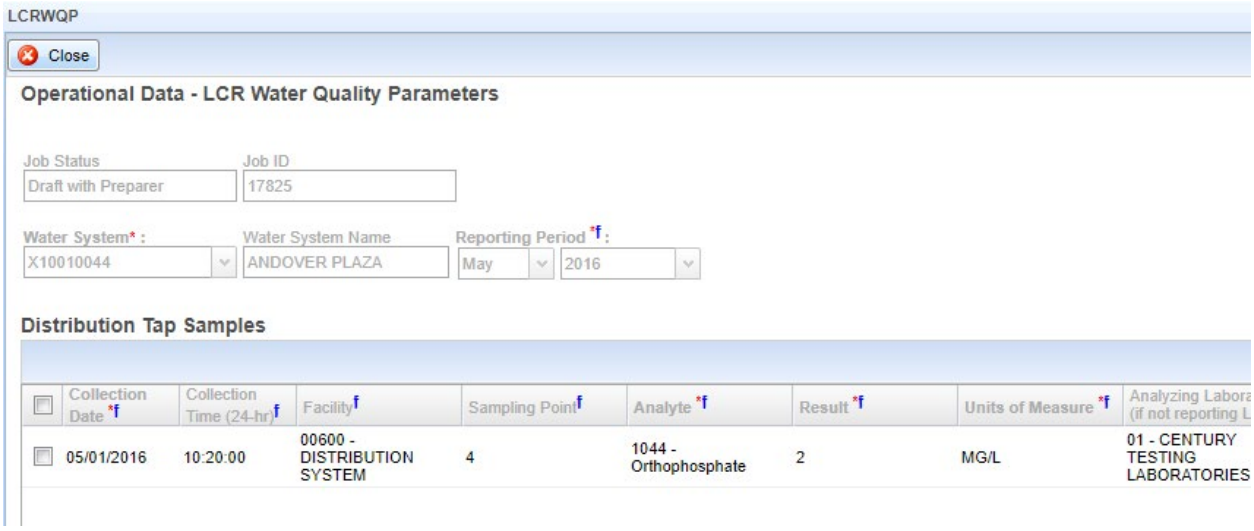


Figure 17 - Lab Read Only, Operational Data LCR WQP

Turbidity CFE, Turbidity IFE, Chlorine Dioxide and Chlorite, Chlorine and Chloramines Entering DS, Chlorine and Chloramines in DS, Total Organic Carbon, Ozone Treatment (Bromate), and TTHM and

HAA5 operational data results will follow the same style as the LCR WQP (Figure 17) where all of the data is visible, but there are no buttons available except the “Close” button.

3.4 Search Individual Samples

When a user clicks on the “Search Individual Samples tab, there are two sub-tabs that can be used for searching: Search Samples and Search Operational Data (Figure 18).

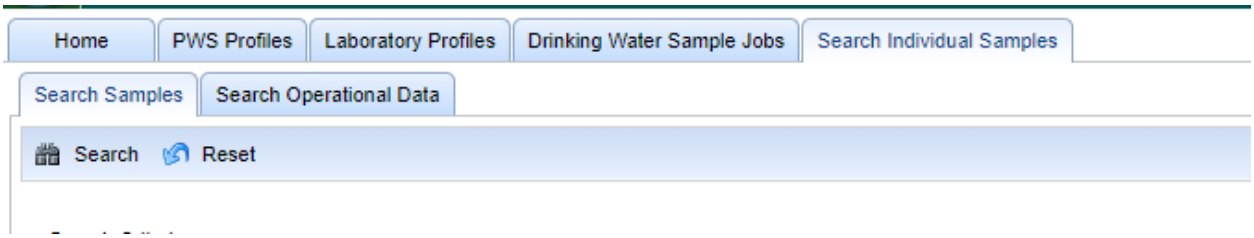


Figure 18 - Lab Read Only, Role Search Individual Samples

The search functions will operate the same as with the other PWS/Lab roles, users are able to view data, but not make any changes.

As shown in Figure 19, when a user searches on a Job ID and clicks on a record to open the job, the job information is locked, preventing any change being made.

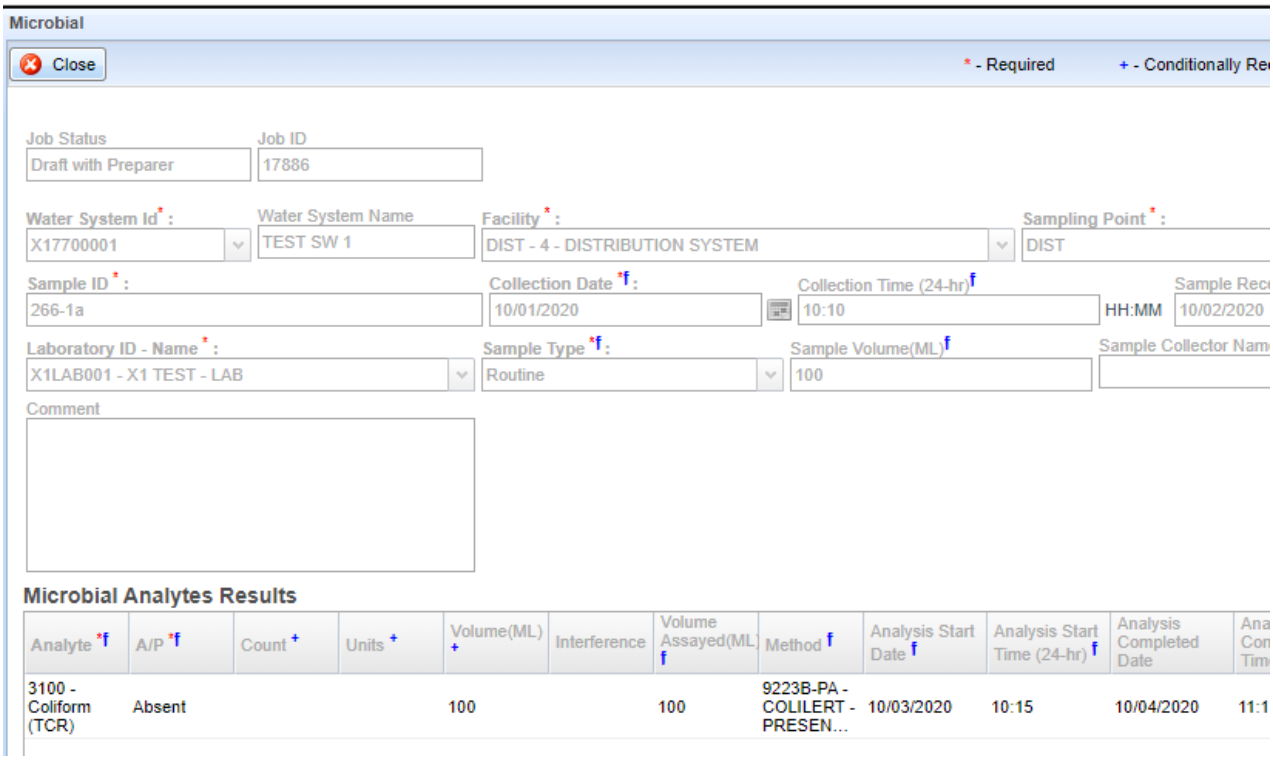


Figure 19 - Lab Read Only, Viewing Searched Sample Results

This behavior is replicated when searching for Operational Data.