CERTIFICATION PORTAL (CP) USER GUIDE

Formally known as: Certification Online (COL)

January 2025

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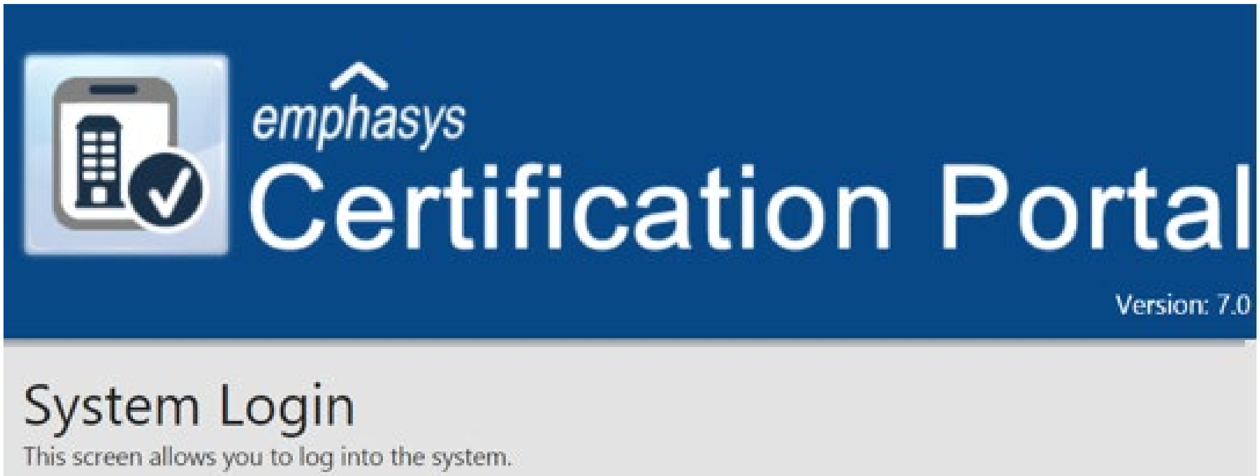
SECTION 1

LOGGING IN



New (Super) User

If you are a new user who will have full control (Super User) of the CP, contact IFA for a User ID and Password.

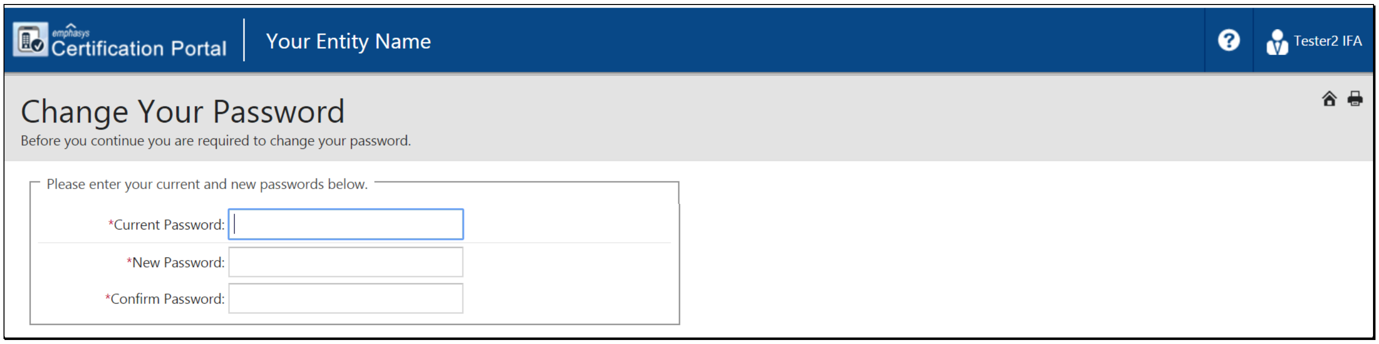
New Non-Super User

If you are a new user assigned by the Super User, the Super User will set up your User ID, Password and assign specific projects to you. Contact your Super-User for set-up and login credentials.

New super and non-super users will login using the IFA issued temporary User ID and Password at the System Login page.

New Users will be required to create a new User ID and Password. This is also the case when IFA resets a Super-user login and password.

NOTE: The username and password fields require at least 6 characters and are case sensitive.

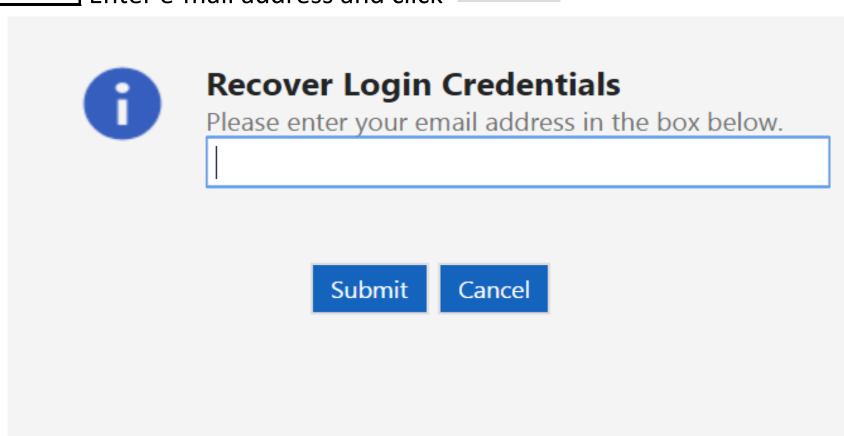


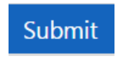
Continue

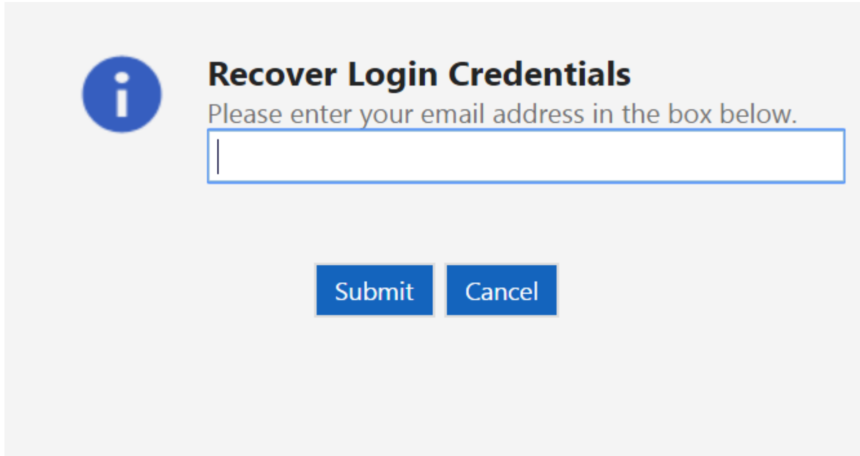
User Login screen

Forgot Username or Password

> Forgot your user name? Enter e-mail address and click Submit



Enter e-mail address and click 

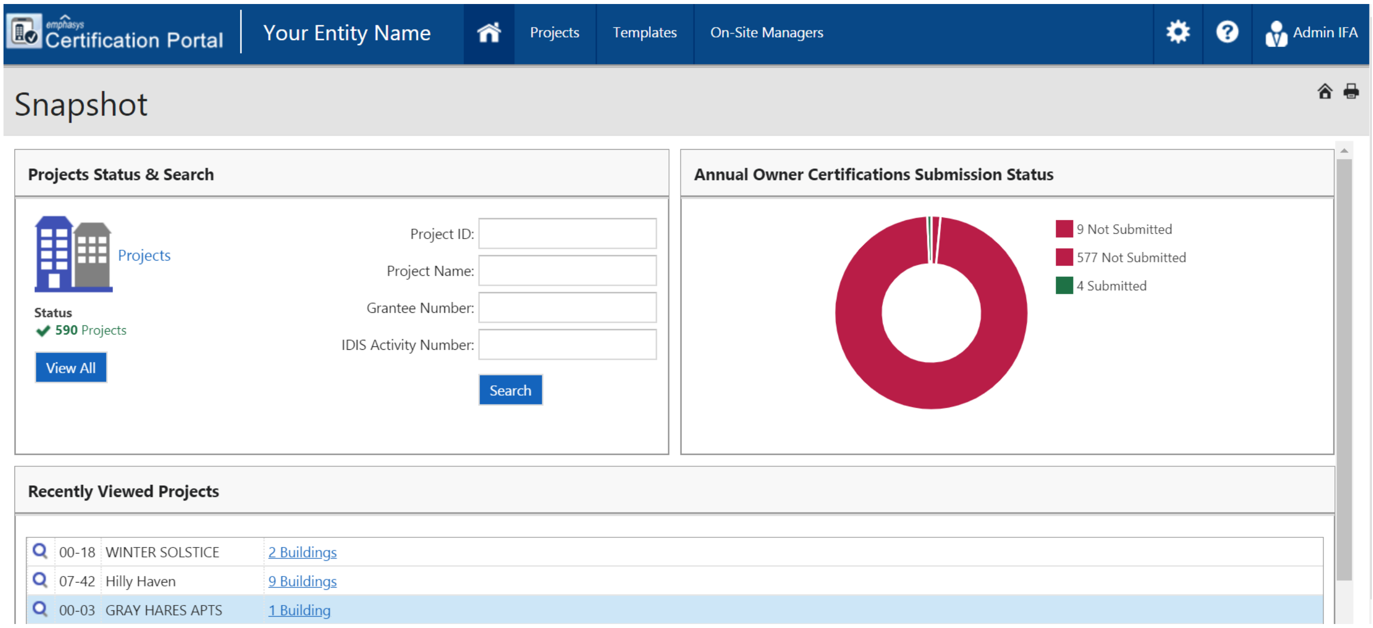


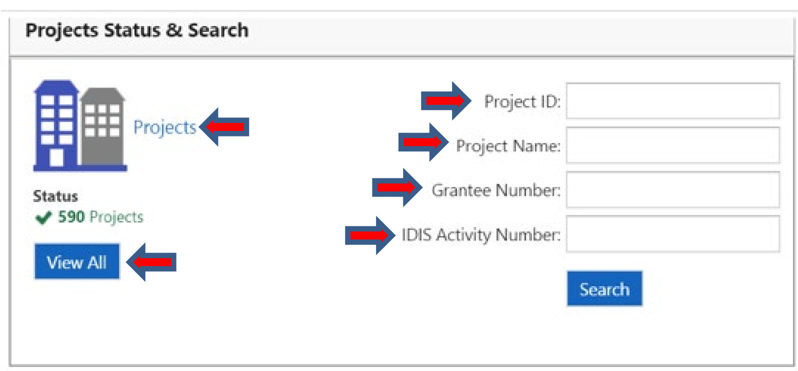
End Section 1

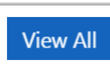
SECTION 2

ACCESSING PROJECTS

Once logged into CP, you will be on the Snapshot page and can access projects using different options.

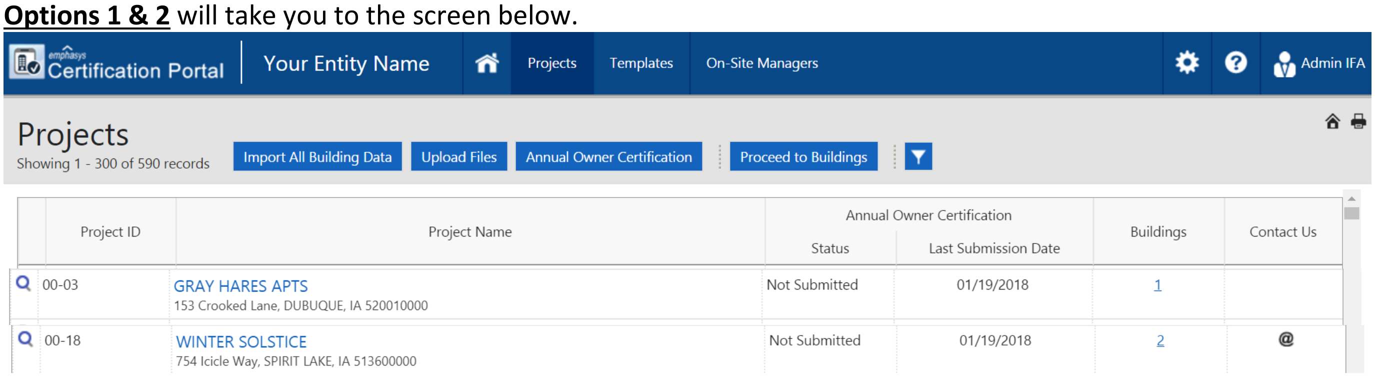




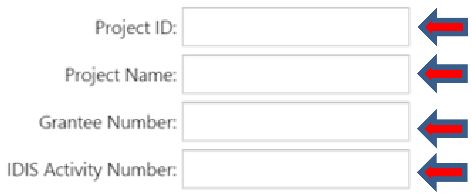
Option 1: Click on 

Option 2: Click on Projects 

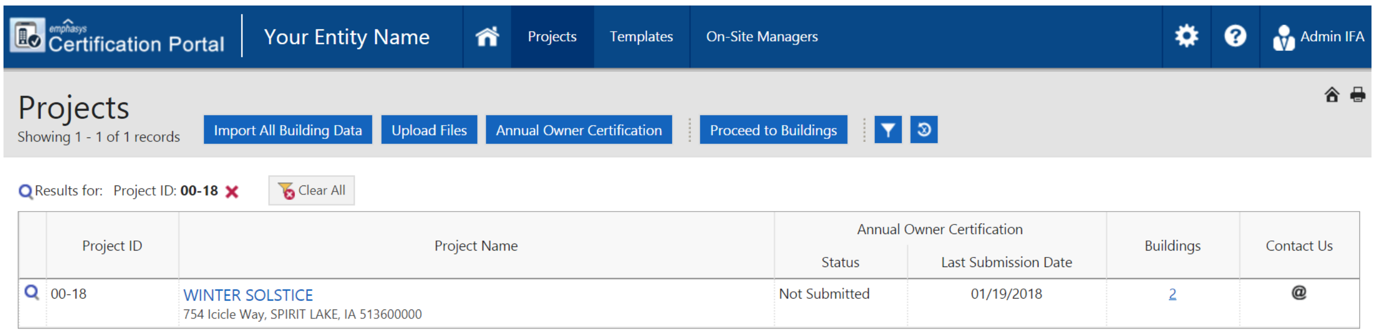
Options 1 & 2 will take you to the screen below.



Option 3: Enter Project ID and/or Project Name. Project ID is for all programs, LIHTC, HOME or NHTF. Grantee Number and IDIS Activity Number is rarely used. Note: using this method requires the entries to be exact. (spelling, dashes, etc.)

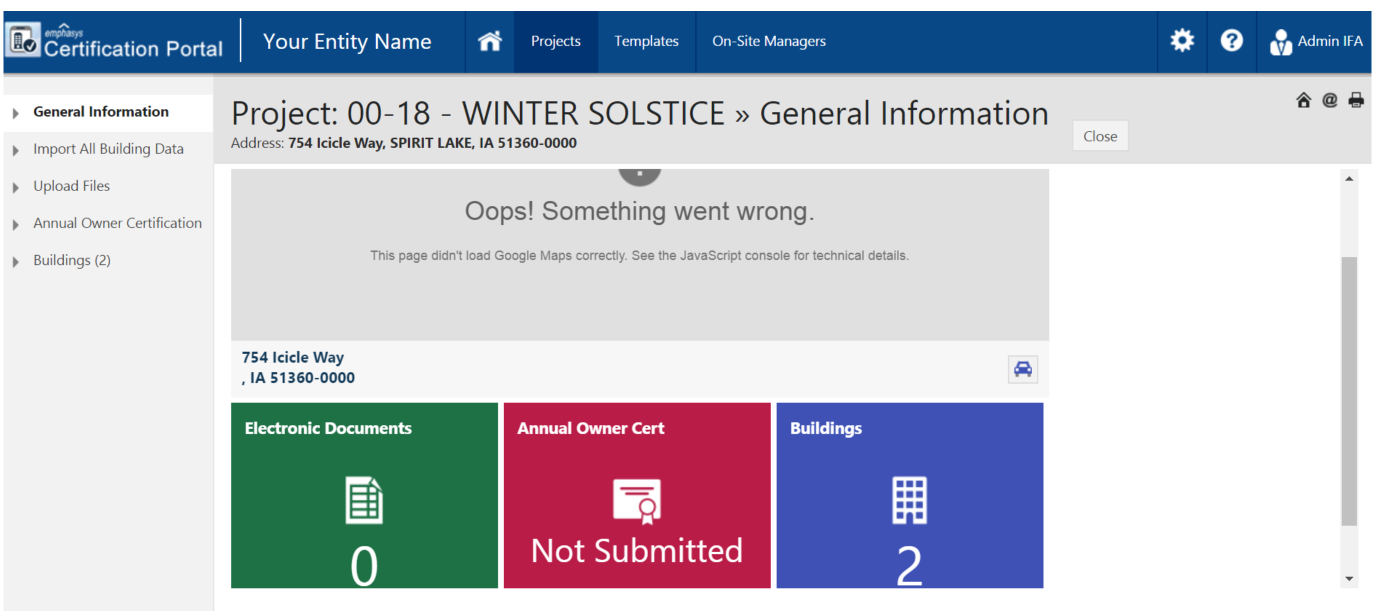


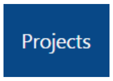
Click on Search This option will take you to this screen.

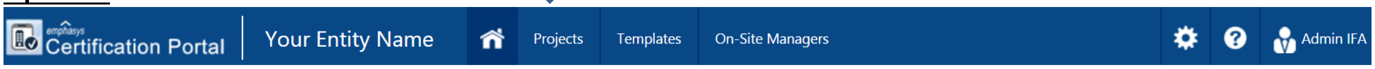


Option 4: If you have recently viewed projects, a list appears of those projects.

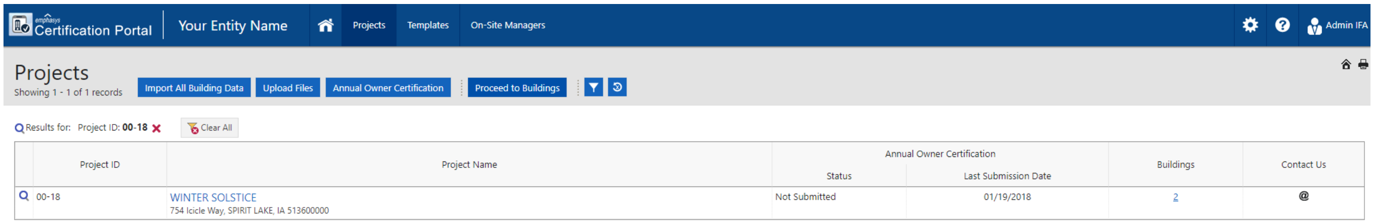
Click on next to desired project. This option will take you to this screen.



Option 5: Click on 



This will take you to your list of assigned projects.

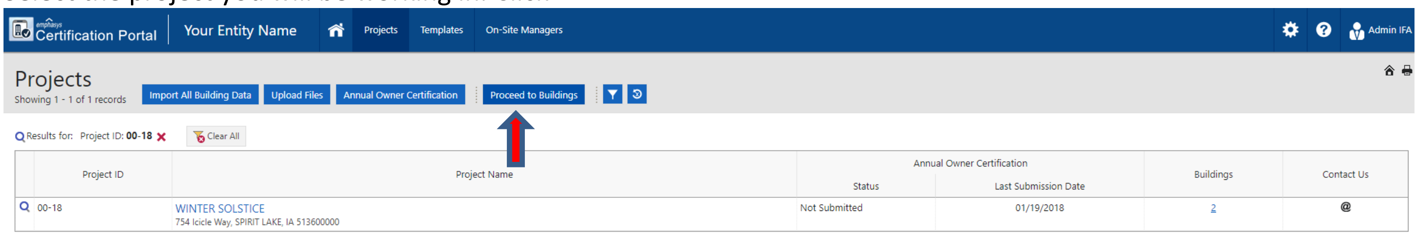


End Section 2

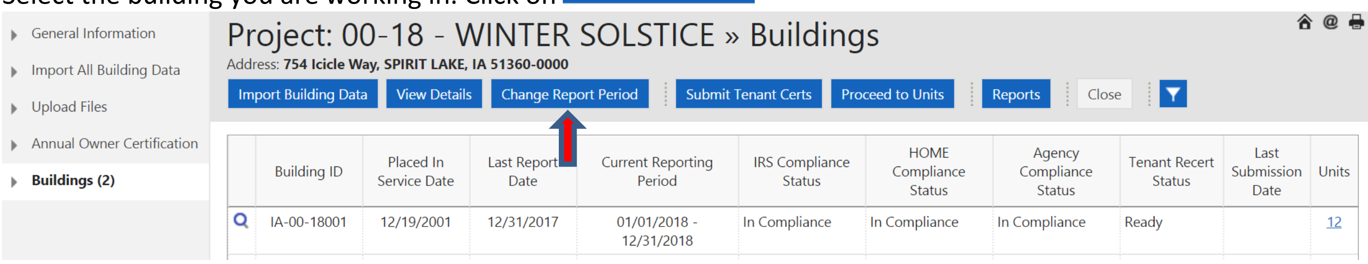
SECTION 3

MANUAL ENTRY
NEW MOVE IN

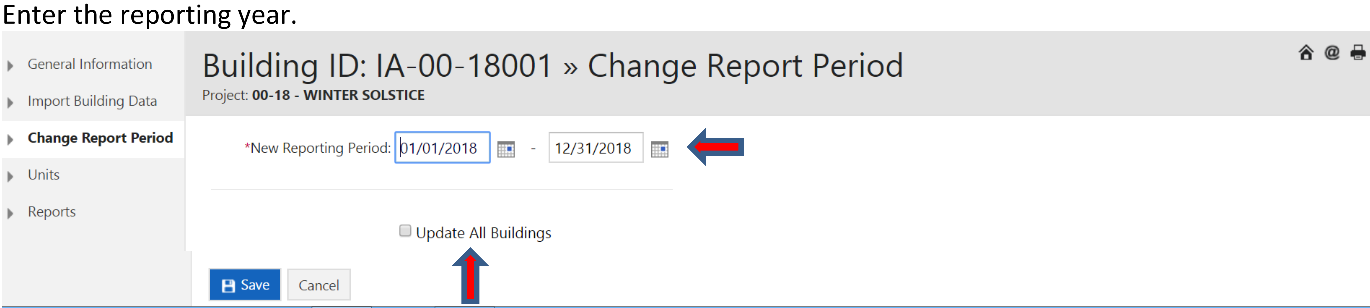
Select the project you will be working in. Click Proceed to Buildings



Select the building you are working in. Click on Change Report Period

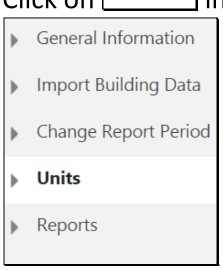


Enter the reporting year.

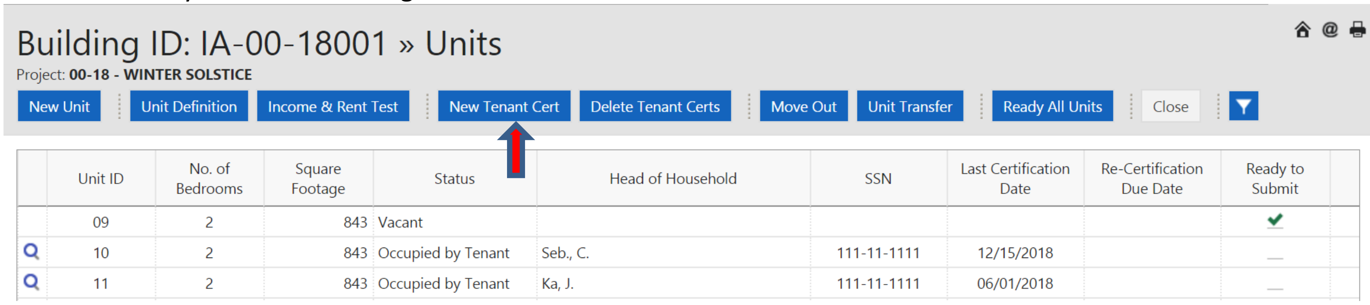


To update the reporting year for all buildings in the project, check the box ☐ Update All Buildings and click Save

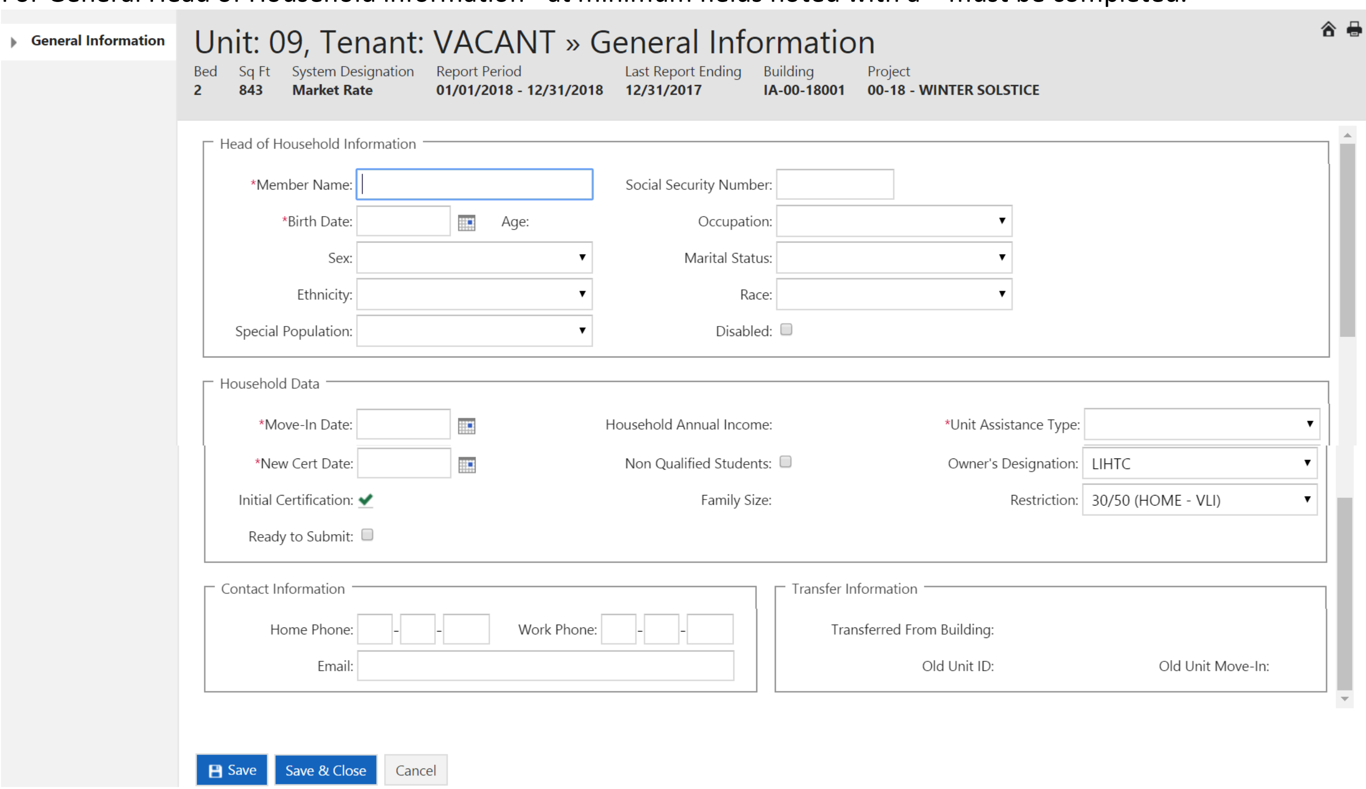
Click on Units in the menu on left side of screen.



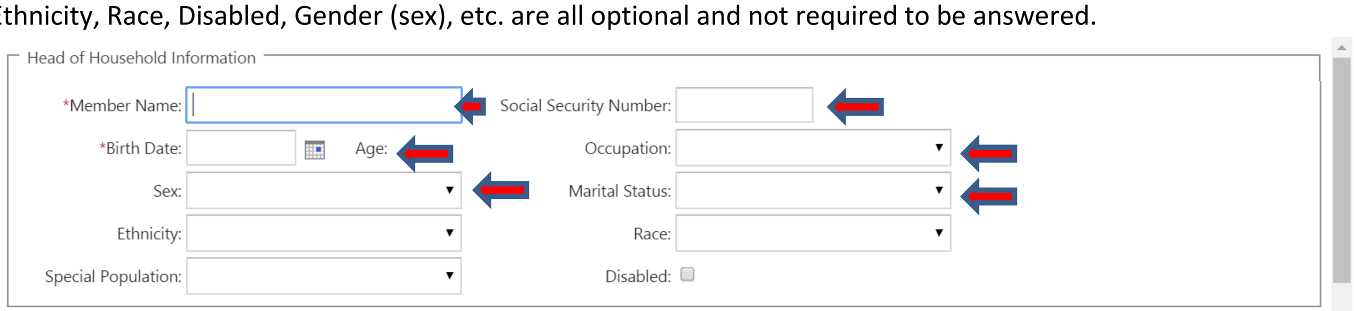
Select the unit you will be working in and click New Tenant Cert



For General Head of Household information - at minimum fields noted with a * must be completed.

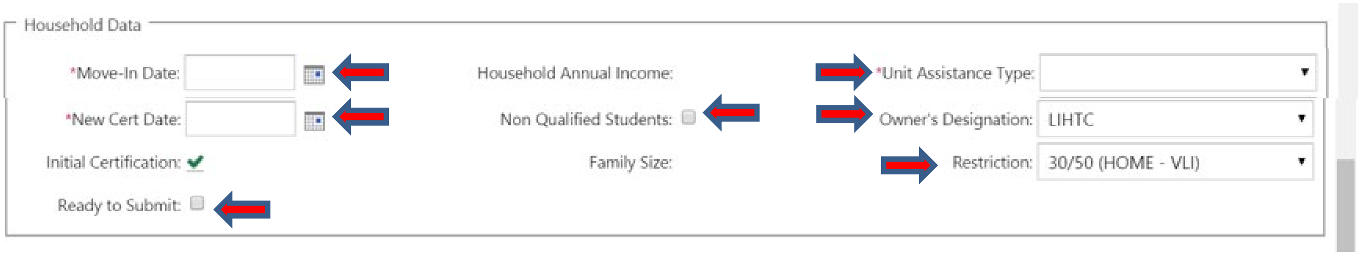


Enter Member (HOH) Name, Birth Date, Social Security Number (last four digits).
Ethnicity, Race, Disabled, Gender (sex), etc. are all optional and not required to be answered.



For additional Household Data -at minimum fields noted with a * must be completed.

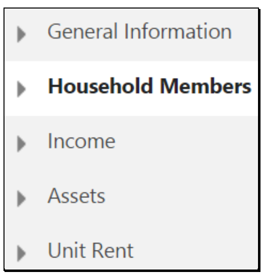
Enter Move-in Date, New Cert Date, Unit Assistance Type, Owner's Designation and Restriction. Check Non-Qualified Student, if applicable, and if household has students that do not meet any exceptions (HOME and/or LIHTC). Initial Certification box will automatically check for Initial Certification. Family Size and Household Annual Income will auto-fill when family data is entered. Check box *Ready to Submit* when entry is complete.
Note: With a new move in, the Move-in Date and New Cert Date should be the same.

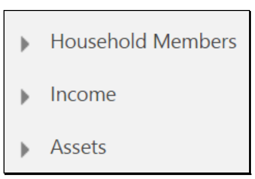


This information is optional in the system and not required by IFA.

Click Save when done with the page or Save & Close when ready to move to next unit.

When clicking Save <u>a menu will open on left side of screen for entering additional household data.</u>

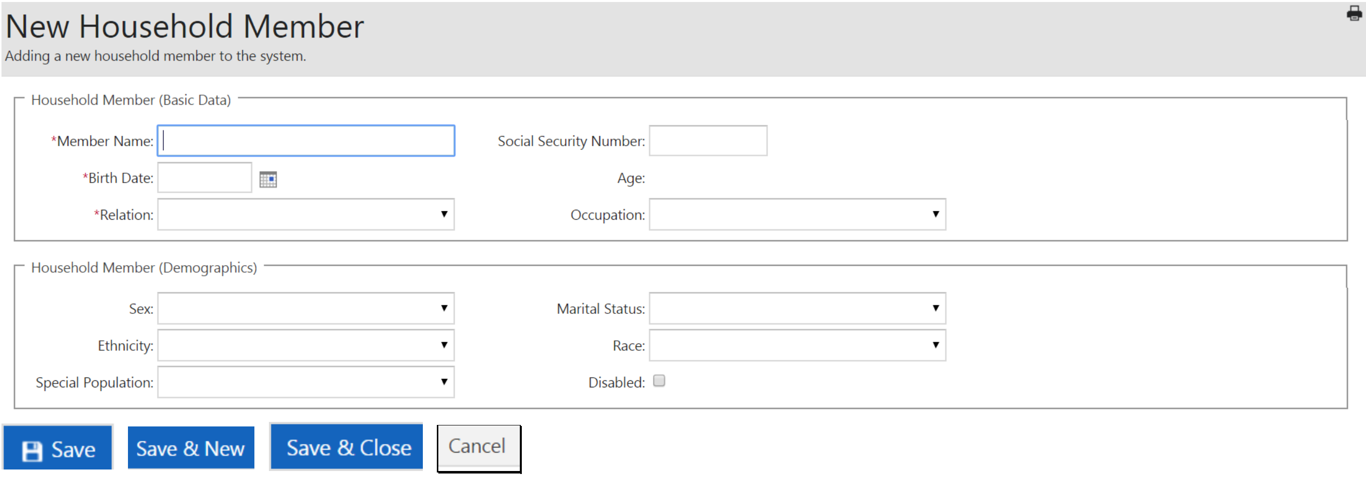




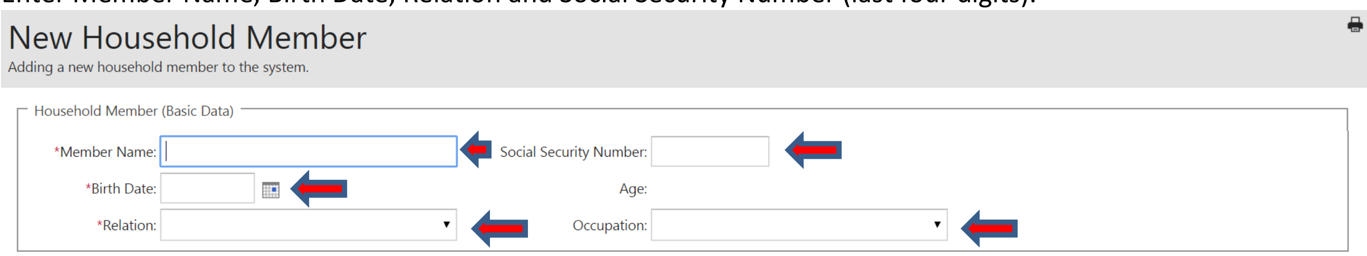
HOME ONLY projects are not required to enter detailed data, therefore these 3 links/sections may not be available.

If more than one household member, click **Household Members** to <u>add each additional</u> (adults, minors, unborn child, etc.) member.

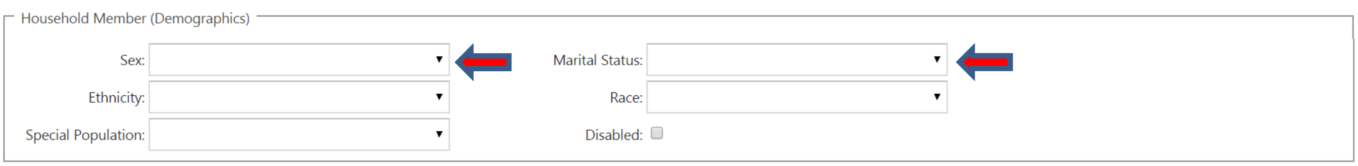
Click **New Member**



Enter Member Name, Birth Date, Relation and Social Security Number (last four digits).

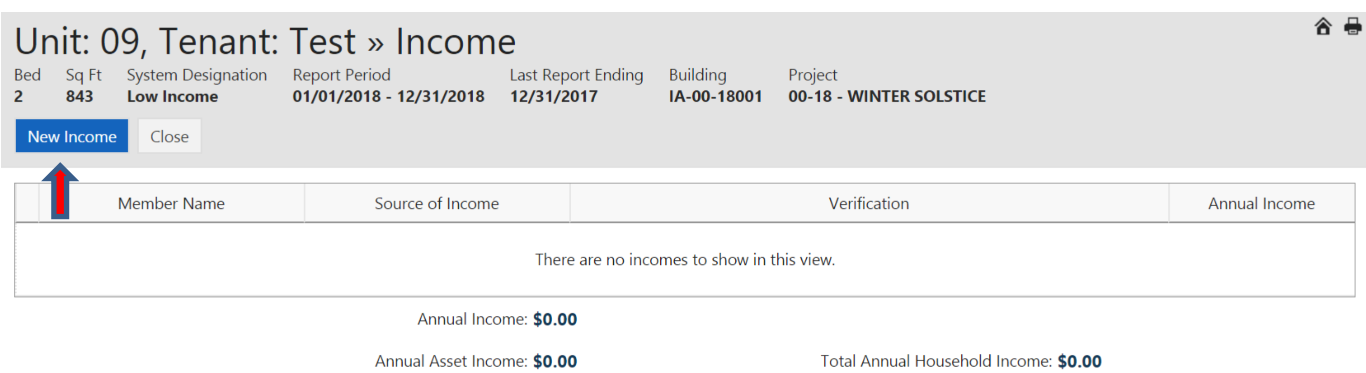


Ethnicity, Race, Disabled, Gender (sex), etc. are all optional and not required to be answered.

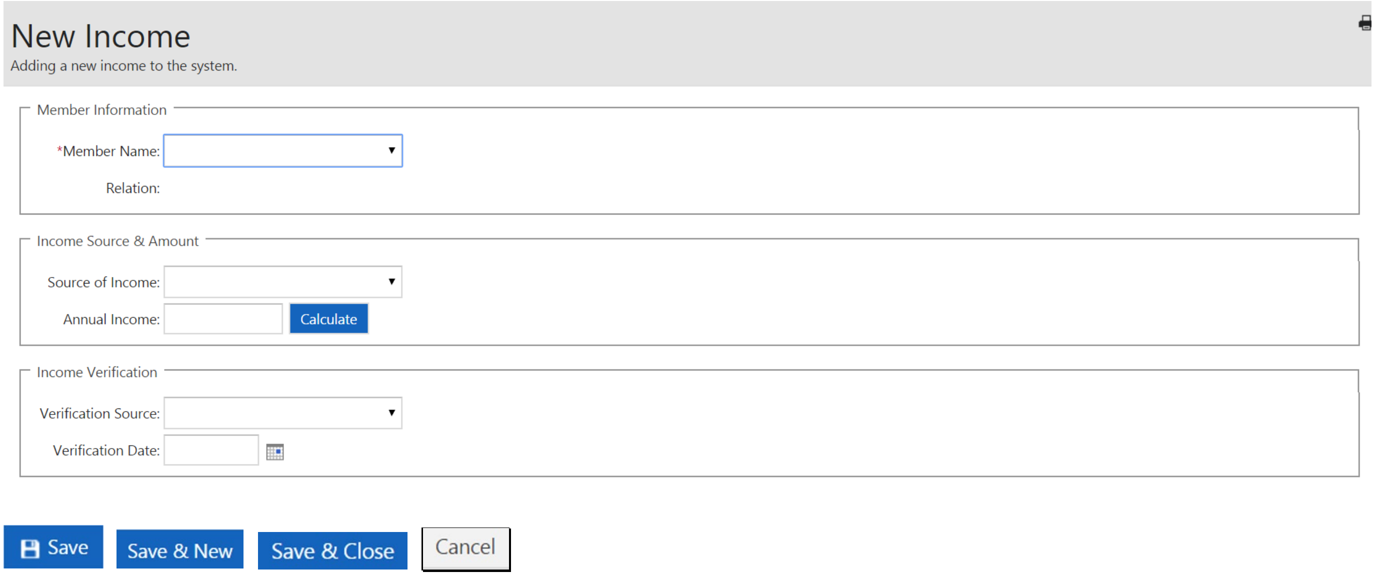


Click **Save** when done with the page, **Save & New** to add additional members, or **Save & Close** when ready to move to next unit.

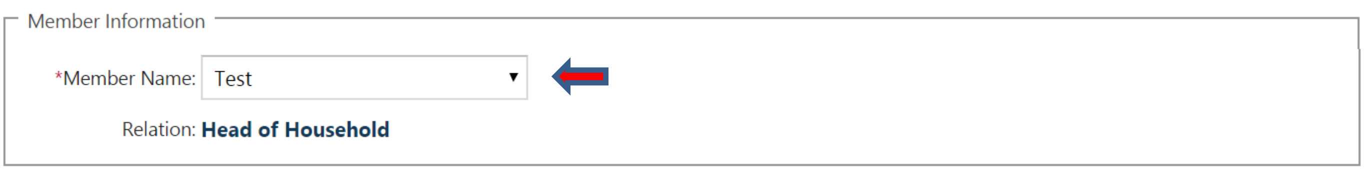
To add all household incomes, click **Income** on the menu on the left side of the screen.



Click New Income to enter household income by Member Name. All boxes with down arrows have drop down selections. Income Source and Amount section must be completed although not asterisked *.

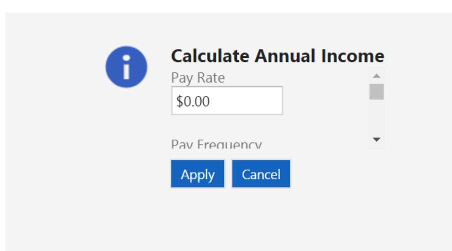


Member Information, click on down arrow to show a list of Member Names. Select name and Relationship.

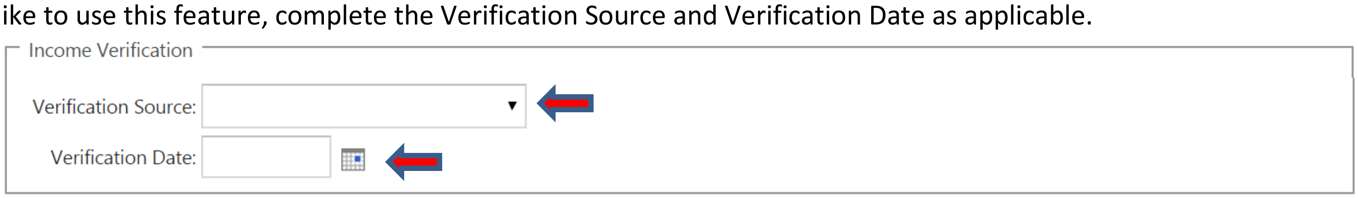


Income Source & Amount, click on down arrow to show Source of Income. Select type of income. Enter Annual Income for the selected member or use the Calculate button as explained below.

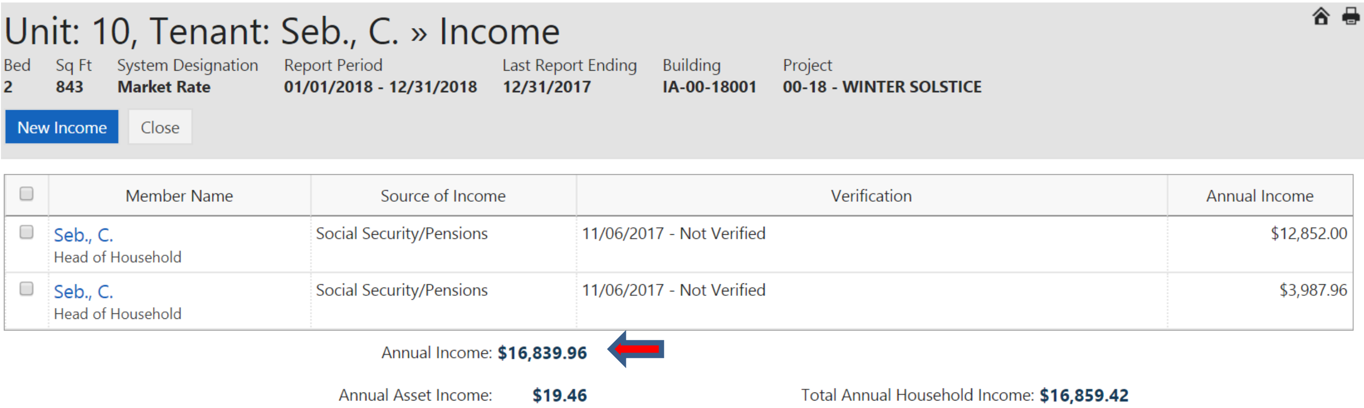
You can enter income listed on the TIC form in the tenant file or click on calculate Calculate to have system calculate each earned income. Enter Pay Rate, Frequency, Hours per Year, and the system will calculate Annual Income. For each income to calculate, click Apply. The calculated incomes will populate the Annual Income box to the Income Source & Amount.



Income Verification, the Income Verification section is not required to be entered. However, if the property would like to use this feature, complete the Verification Source and Verification Date as applicable.



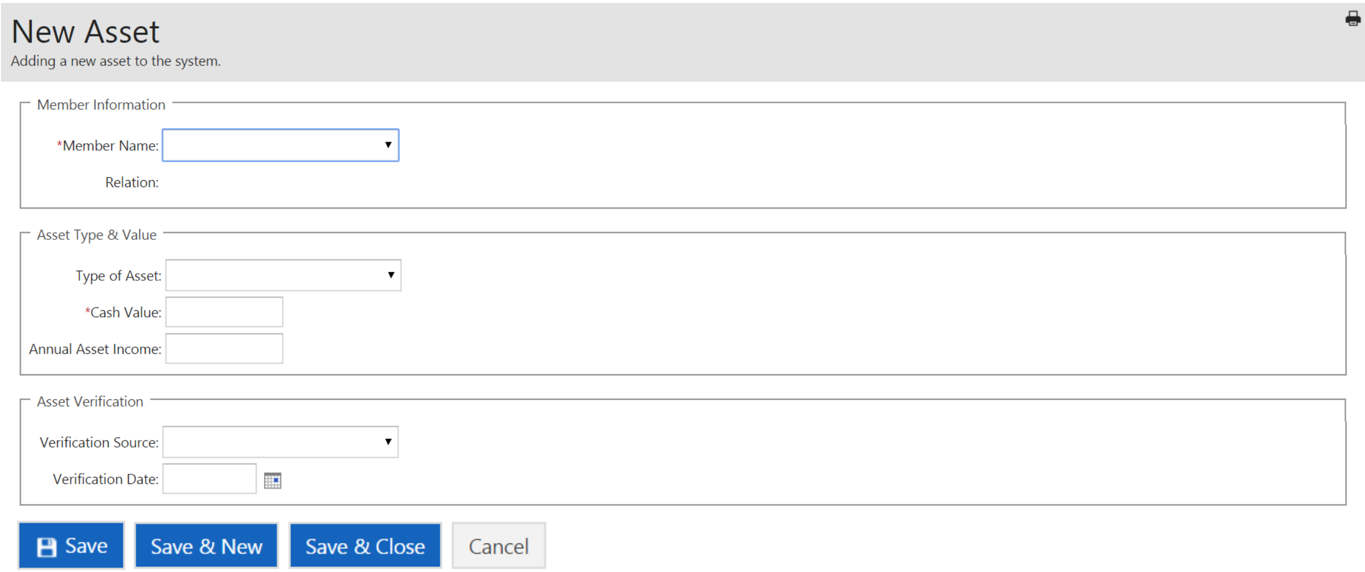
Once all incomes have been entered and saved, the main tenant screen will show a calculated Annual Income.



Click Save when done with the page or Save & New to add additional incomes or Save & Close when ready to move to next unit.

To add all household Assets (if any), click Assets on the menu on the left side of the screen.

Click on New Asset to enter household asset data by Member Name. Fields with down arrows have drop down selections. **At minimum, fields noted with a * must be completed.**



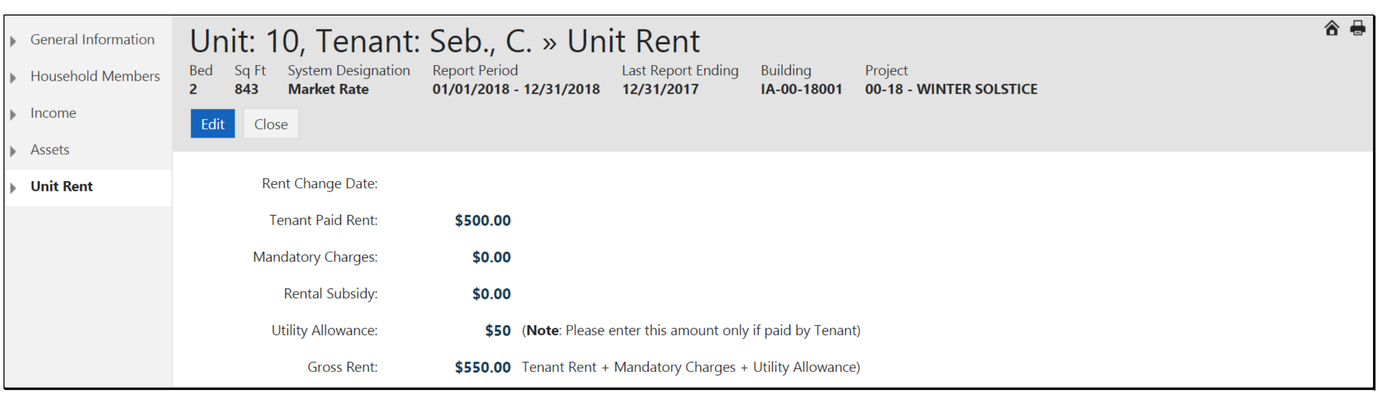
In Member Information, click on down arrow to show a list of Member Names. Select name and Relationship.

In Asset Type & Cash Value, click on down arrow to show Type of Asset and select type. Enter Cash Value and Annual Asset Income for the selected member.

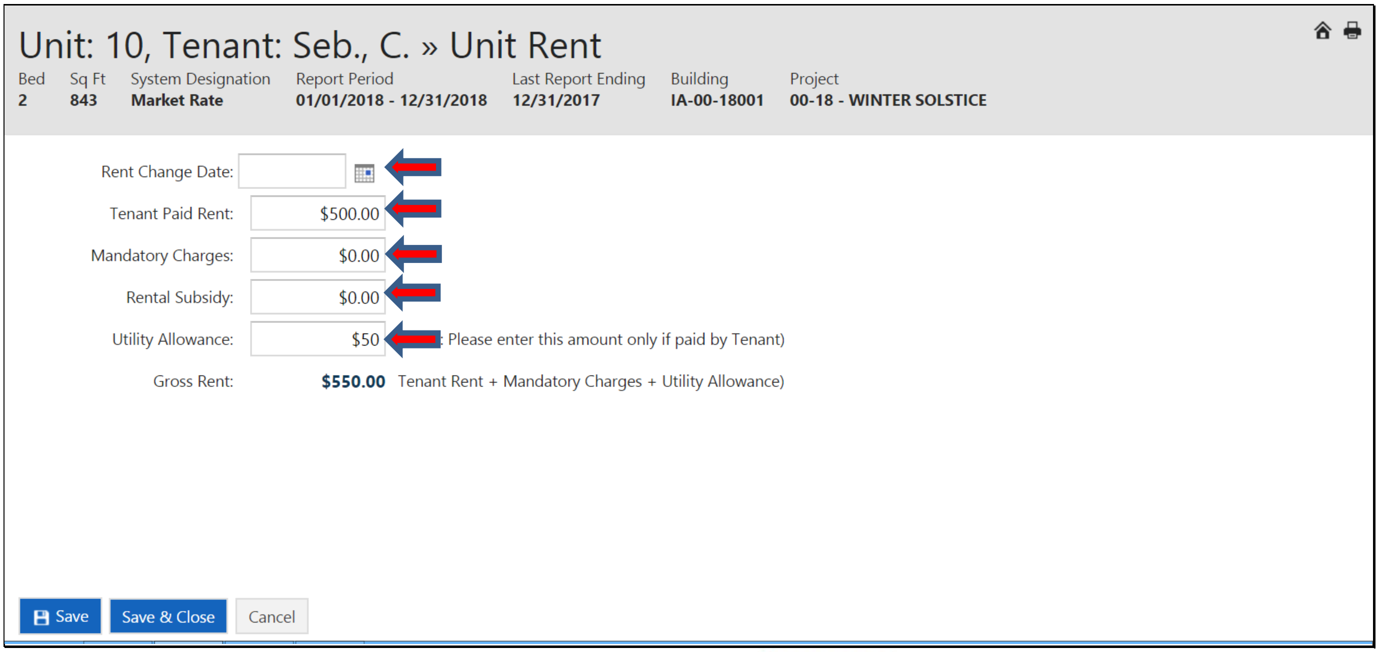
The Asset Verification section includes Verification Source and Verification Date. The Asset Verification section is not required to be entered. However, if the property would like to use this feature, complete the Verification Source and Verification Date as applicable.

Click **Save** when done with the page or **Save & New** to add additional Assets or **Save & Close** when ready to move to next unit.

To enter rent data, click **Unit Rent** on the menu on the left side of the screen.



Click Edit to access Rent fields.



When all data has been entered in all screens in the unit, click Save & Close to return to Unit screen.

Rent Change Date:

****DO NOT**** enter a Rent Change Date except in cases where a significant increase or decrease in rent has occurred at a time other than recertification that changes the tenant paid portion (TPP)., i.e. new subsidy added, subsidy removed, utility allowance changed, etc.

Tenant Paid Rent: This is the out of pocket amount the tenant pays (TPP) for rent.

Mandatory Charges: These are non-optional/mandatory fees that the tenant must pay as a condition of occupancy (garage rental, renter's insurance, etc.).

Rental Subsidy: This is the amount of subsidy the tenant is receiving in rental assistance (Section 8 voucher or other government rental assistance).

Utility Allowance: This amount reflects what has been provided by the local PHA or an IFA-approved allowance.

Gross Rent: If Tax Credit only it will include Tenant Paid, Mandatory Charges, and Utility Allowance. If HOME/TC/NHTF or HOME or NHTF only it will include all fields.

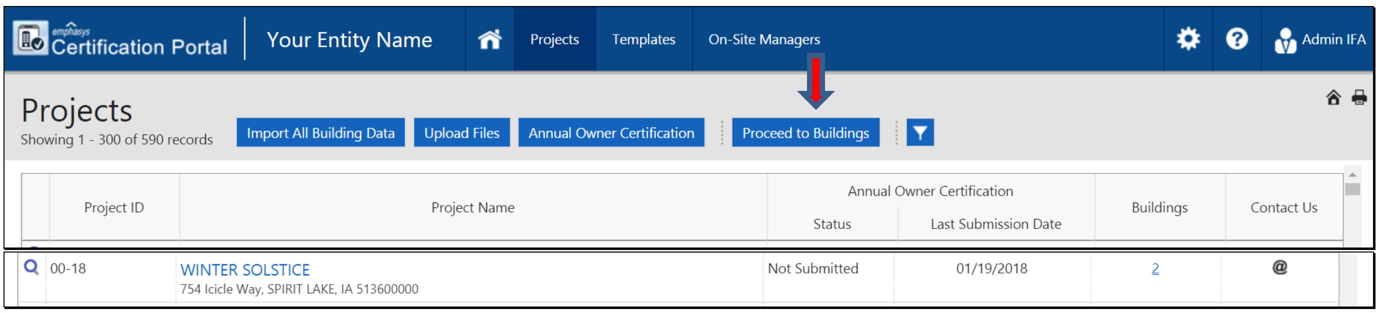
End Section 3

SECTION 4

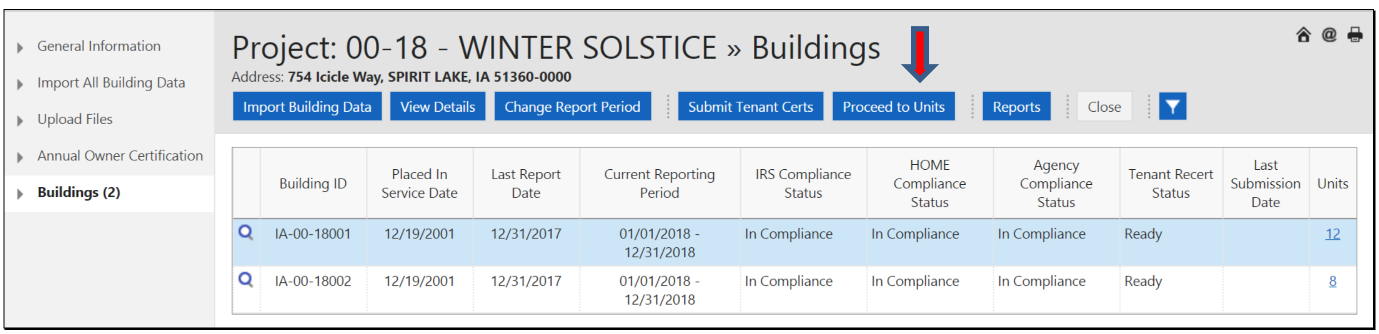
MANUAL ENTRY RECERTIFICATION

For projects that are Mixed Use (have Market Rate units), full recertifications are required throughout the life of the project. For projects that are Mixed Income (have lower targeted Agency Covenant units), full recertifications are required on the lower targeted units throughout the life of the project. For HOME or NHTF, full recertifications are required every 6th year of the Affordability Period.

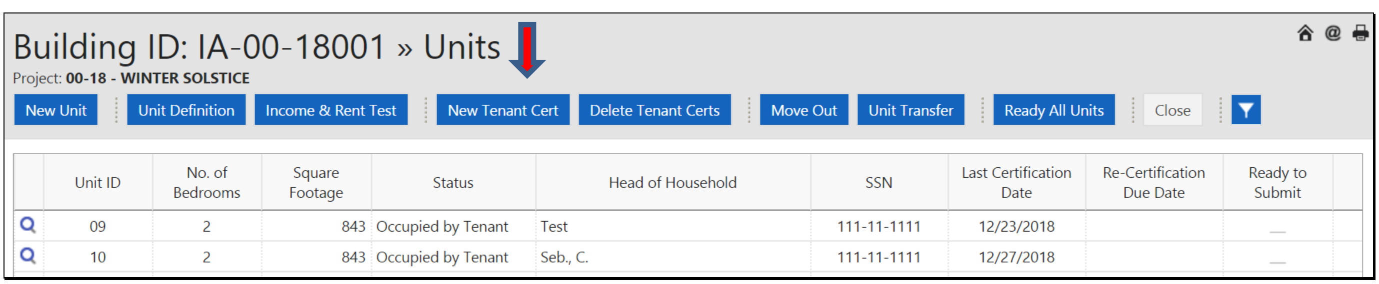
Select the project and Proceed to Buildings

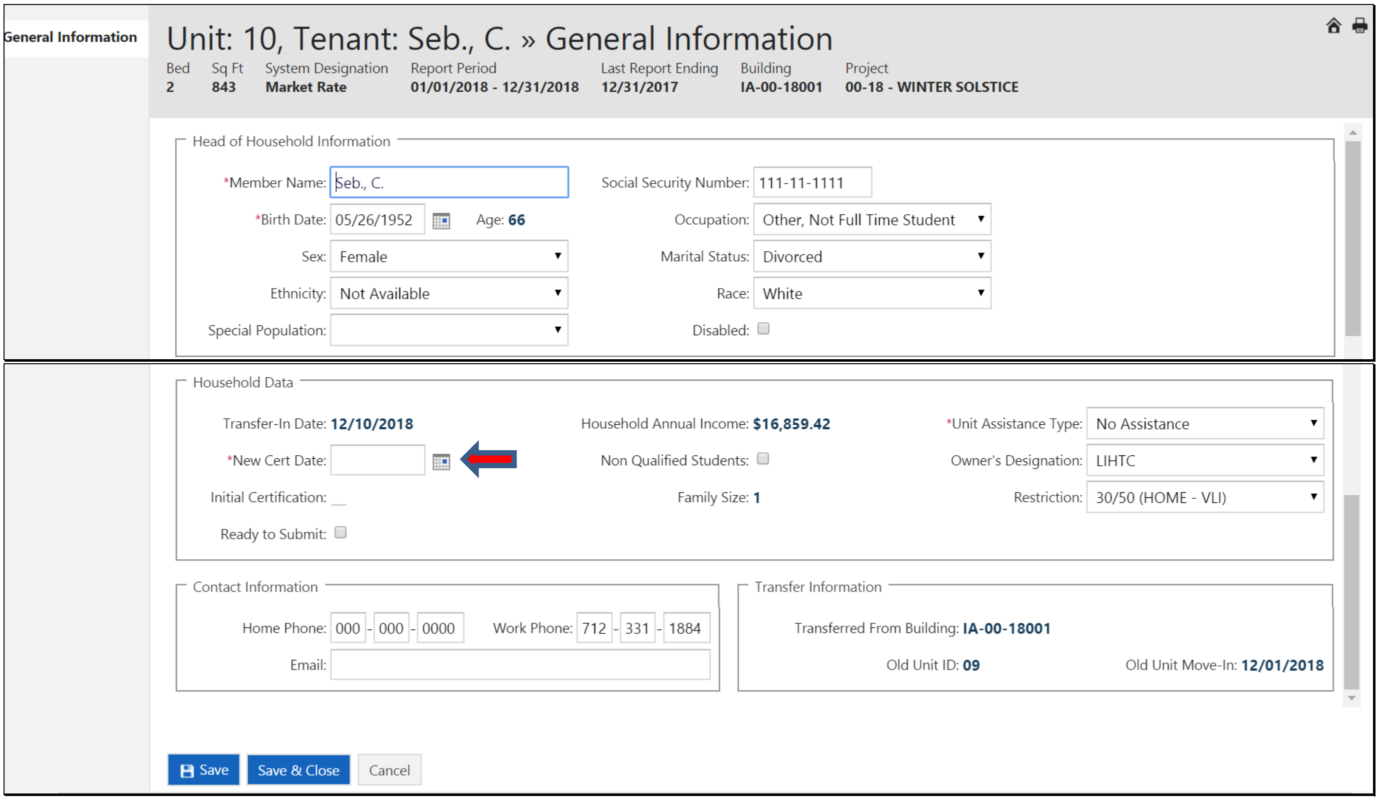


Select the building then click Proceed to Units



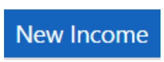
Select the unit then click New Tenant Cert

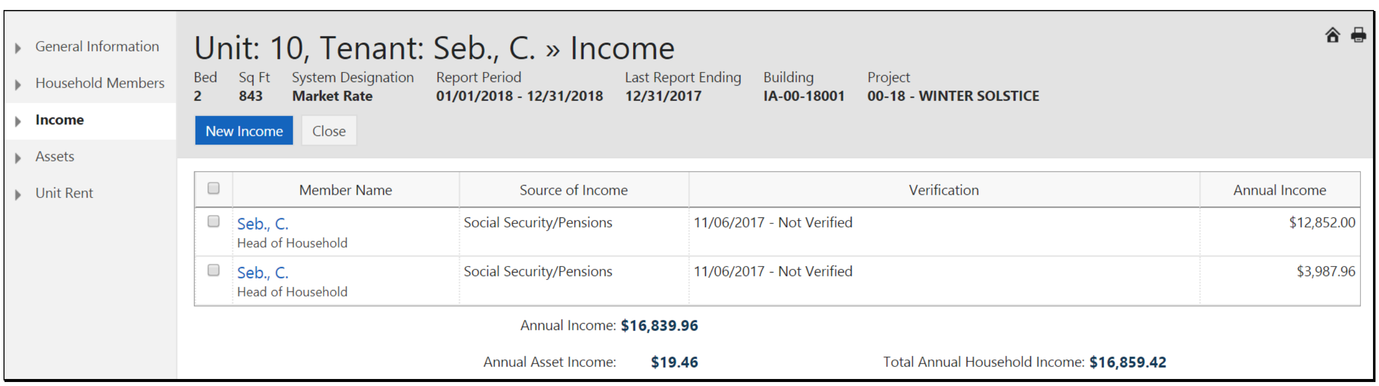


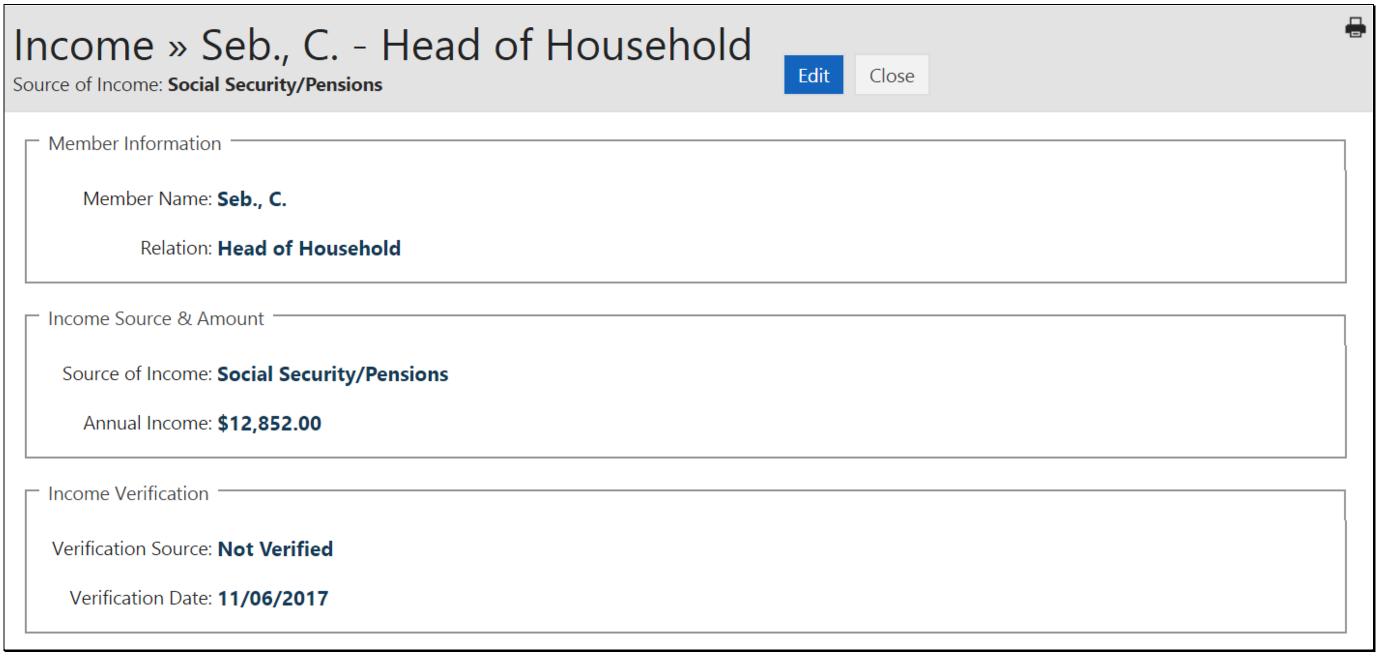


Enter New Cert Date 

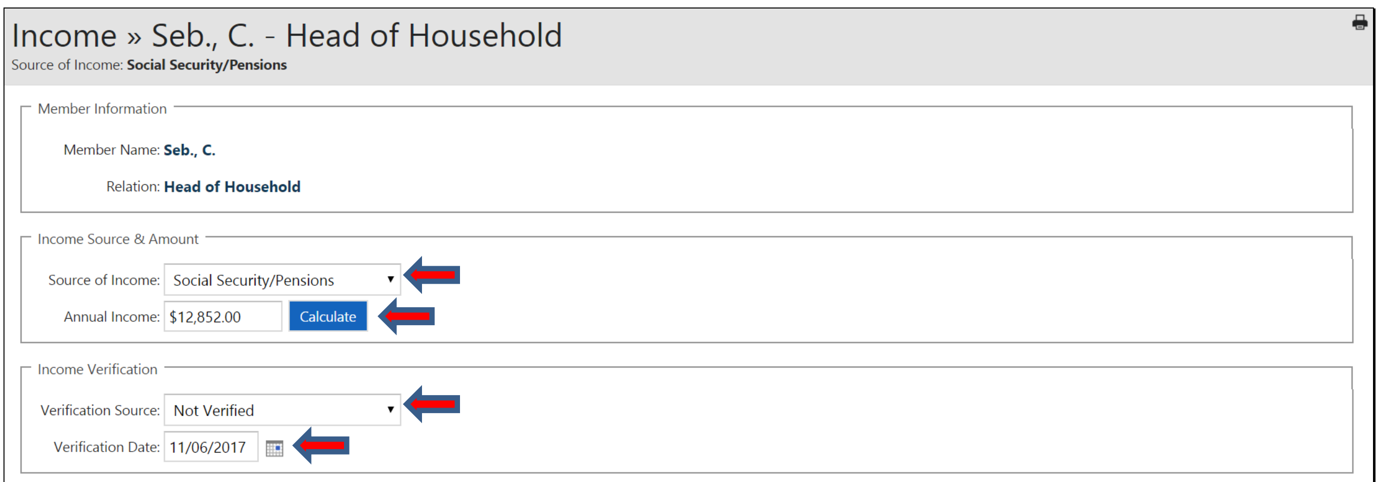
and click 

Click on member name then 

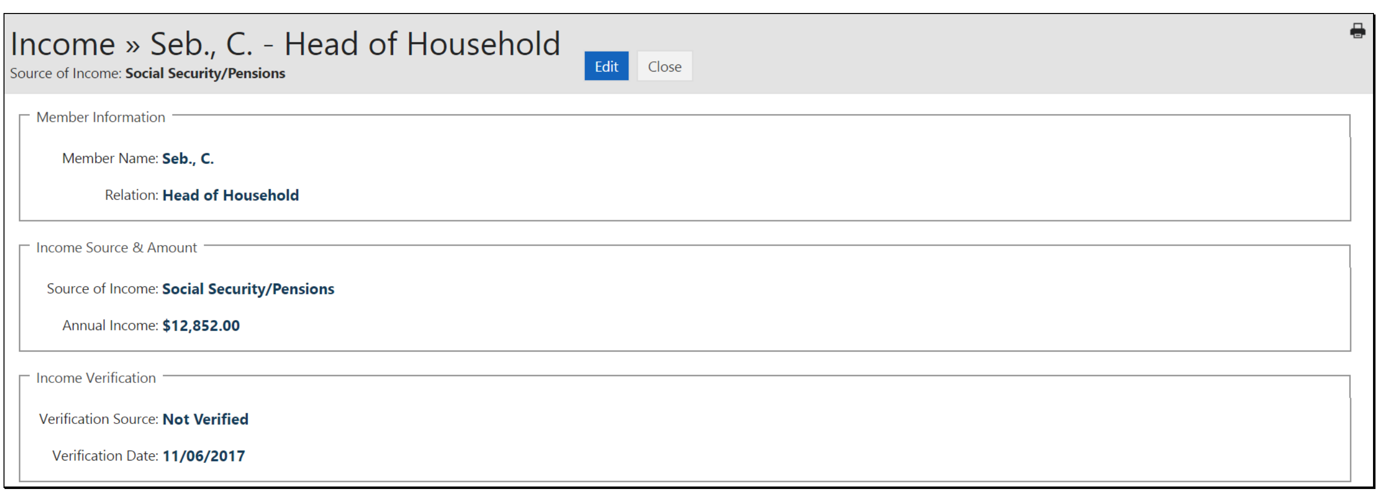




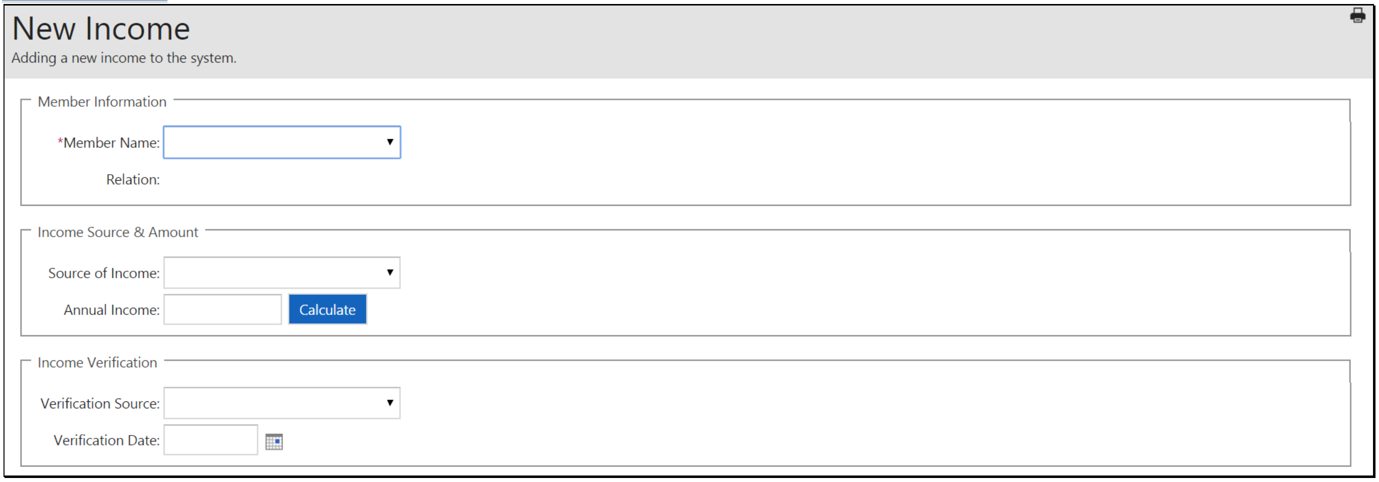
Click Edit and update the applicable fields.



Click Save



Save & New

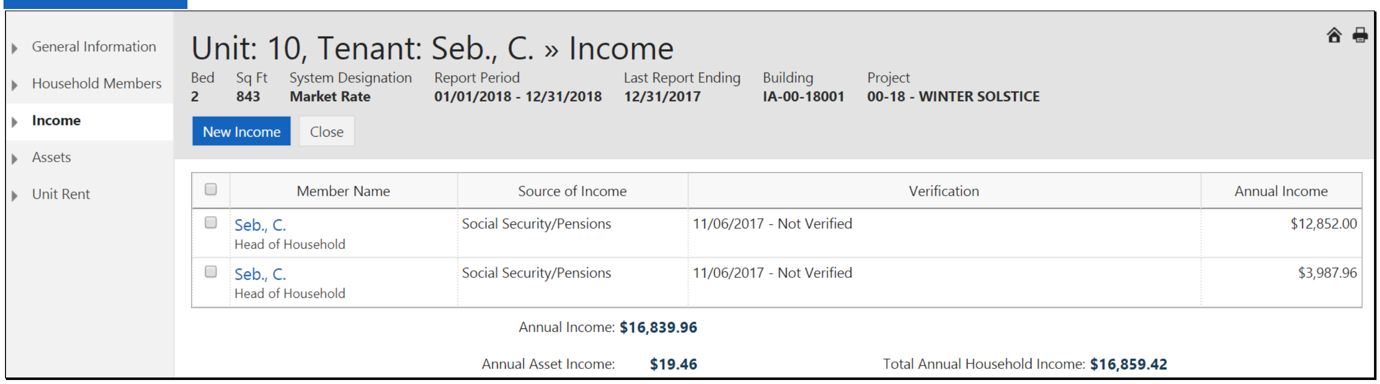

New Income
Adding a new income to the system.

Member Information
*Member Name:
Relation:

Income Source & Amount
Source of Income:
Annual Income: Calculate

Income Verification
Verification Source:
Verification Date:

Save & Close


General Information
Household Members
Income
Assets
Unit Rent

Unit: 10, Tenant: Seb., C. » Income

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Market Rate	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

New Income Close

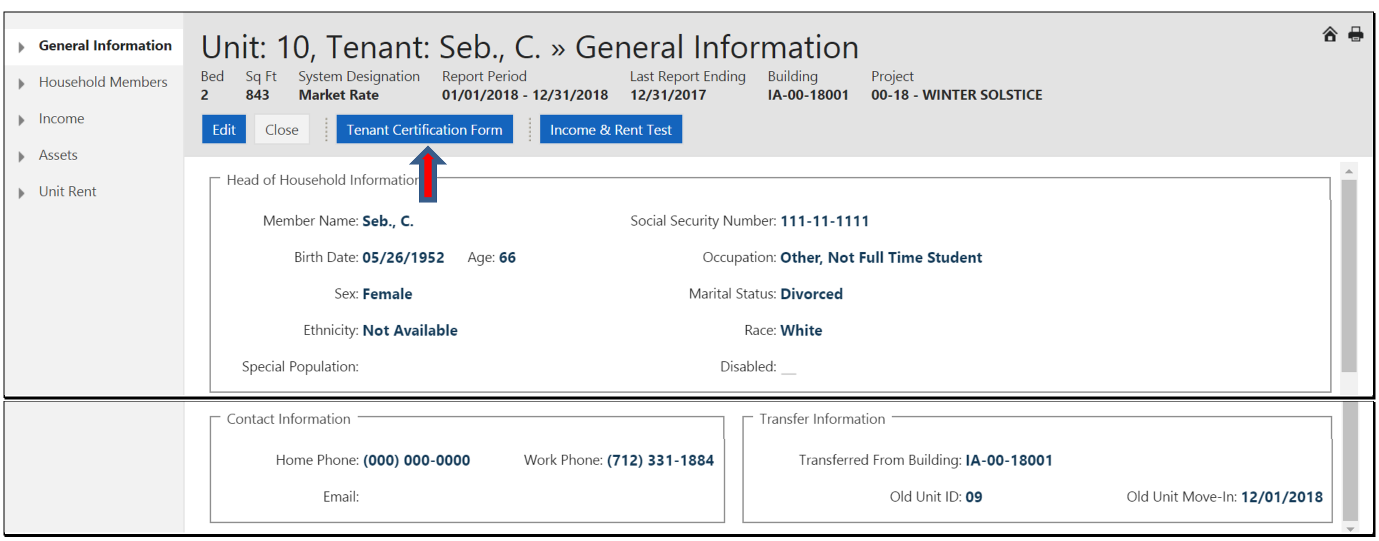
Member Name	Source of Income	Verification	Annual Income
Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$12,852.00
Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$3,987.96

Annual Income: $16,839.96

Annual Asset Income: $19.46 Total Annual Household Income: $16,859.42

***Repeat income and asset edits and/or additional sources until complete.

Tenant Certification Form - IFA **does not** accept the CP system generated TIC form for file reviews. IFA has a required TIC form that can be found on the IFA website.


General Information
Household Members
Income
Assets
Unit Rent

Unit: 10, Tenant: Seb., C. » General Information

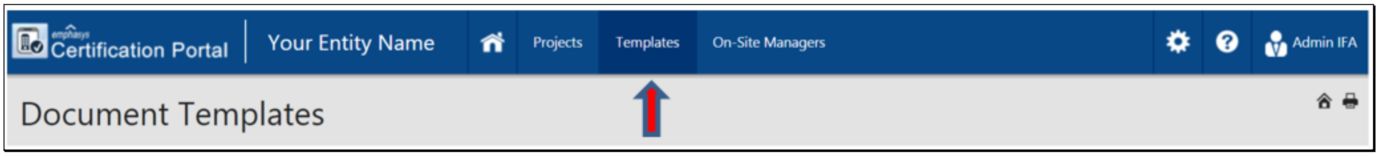
Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Market Rate	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

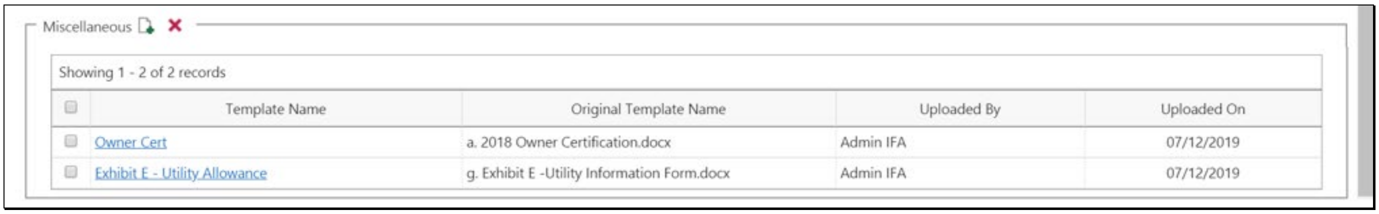
Edit Close Tenant Certification Form Income & Rent Test

Head of Household Information
Member Name: Seb., C. Social Security Number: 111-11-1111
Birth Date: 05/26/1952 Age: 66 Occupation: Other, Not Full Time Student
Sex: Female Marital Status: Divorced
Ethnicity: Not Available Race: White
Special Population: Disabled:

Contact Information
Home Phone: (000) 000-0000 Work Phone: (712) 331-1884
Email:

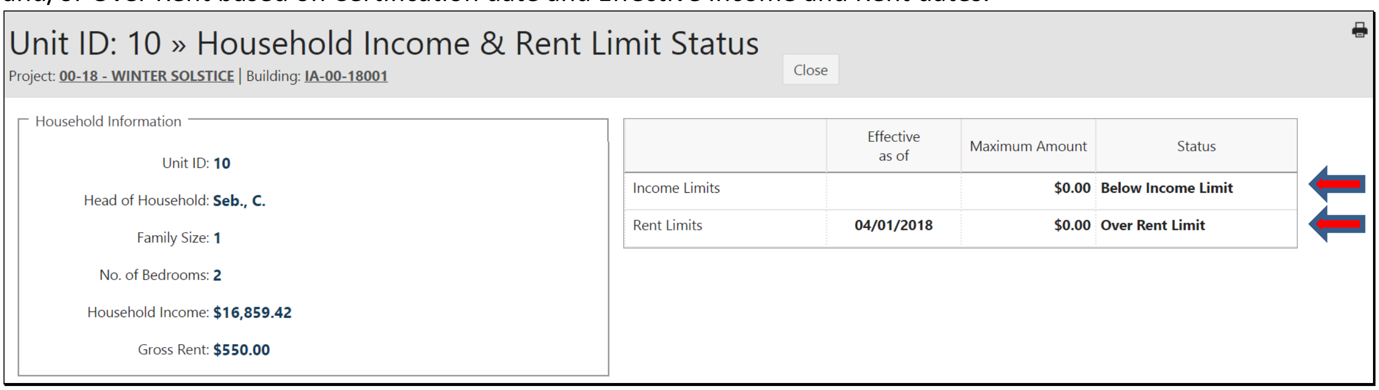
Transfer Information
Transferred From Building: IA-00-18001
Old Unit ID: 09 Old Unit Move-In: 12/01/2018



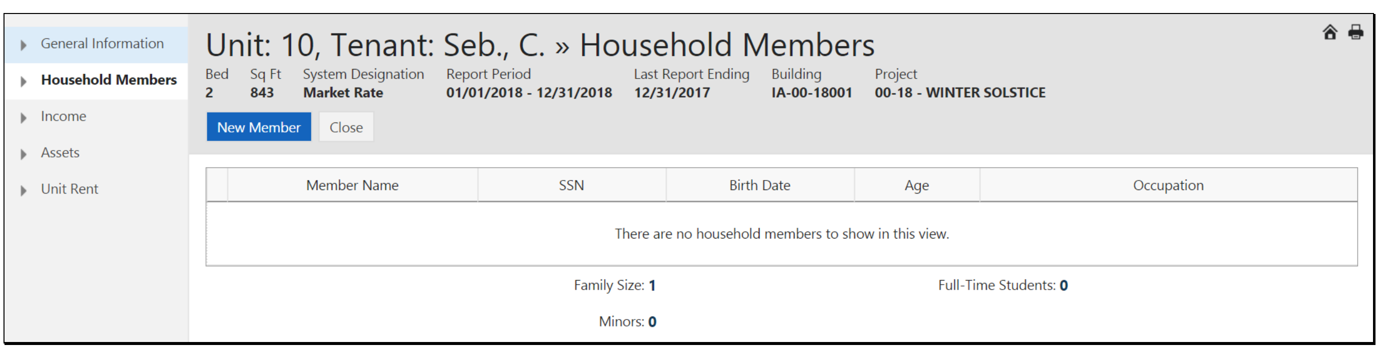


Income & Rent Test

It is highly recommended you view the Income & Rent Test which will identify if the system determines Over Income and/or Over Rent based on Certification date and Effective Income and Rent dates.

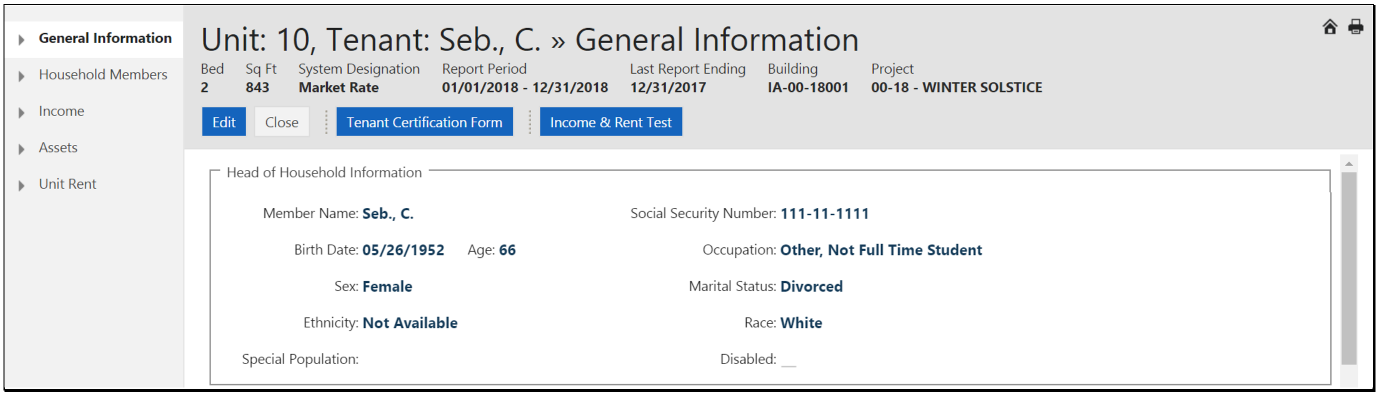


Click **Household Members** if there have been any changes to the members. If a member (other than HOH) moved out during the year, click on the household member that you would like to remove. Once the tenant is selected, at the bottom of the page, **Delete** 1 household member selected will appear. Click on the delete button to remove the household member. If the household member that you would like to delete is tied to one or more incomes, the income for that person must be deleted first.

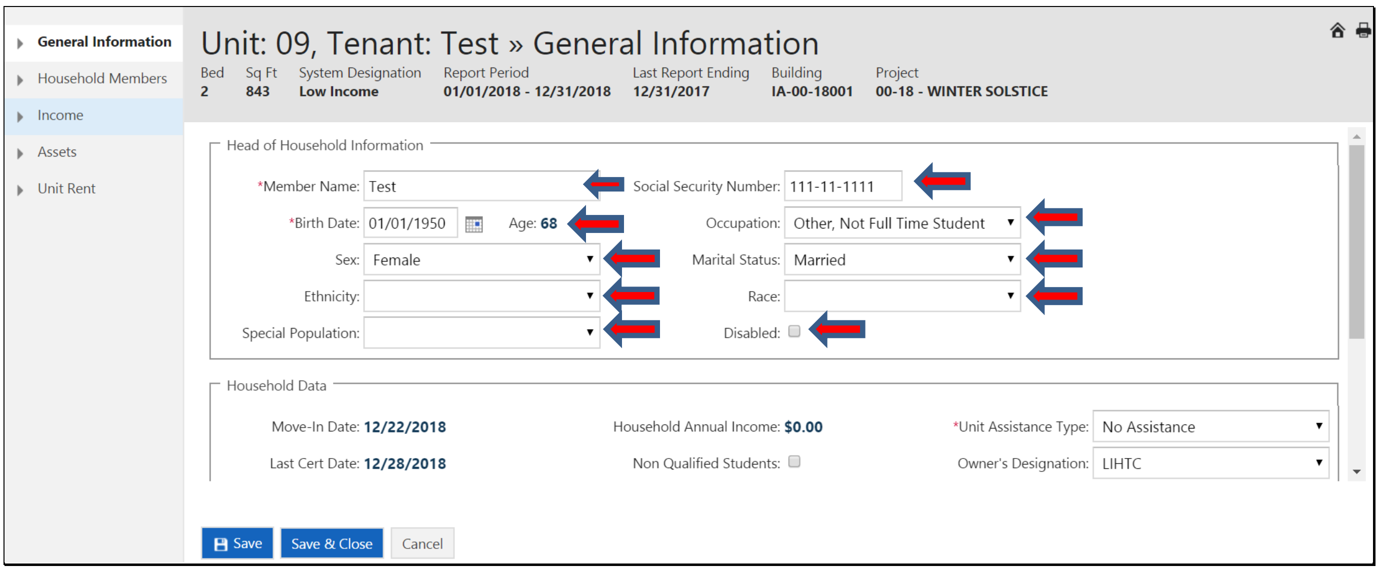


Upon reviewing all data entered in the system, if you identify an entry error, select **Edit**

NOTE: Move in dates can only be corrected by using Delete Tenant Cert.

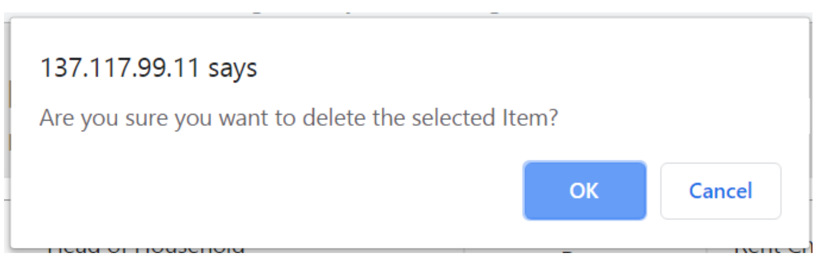


Edit any field applicable and identified below and **Save** or **Save & Close**



Delete Tenant Certs

If a date of certification, move in, or transfer was entered incorrectly, click *Delete Tenant Certs* to remove the incorrect entry. Only the entry with  can be deleted. When more than one entry has an  delete must be completed starting from top entry.



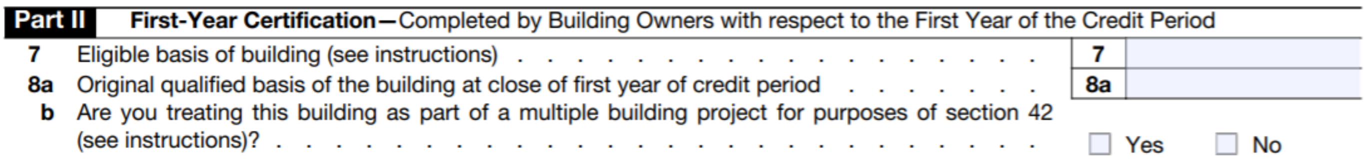
End Section 4

SECTION 5

MANUAL
UNIT TRANSFER

1. Within Same Building (If only one building or 8609 8b election, when project has multiple buildings and owner elected to treat buildings as single buildings)

2. Between Buildings (Multiple Building Project 8609 8b Election Only)



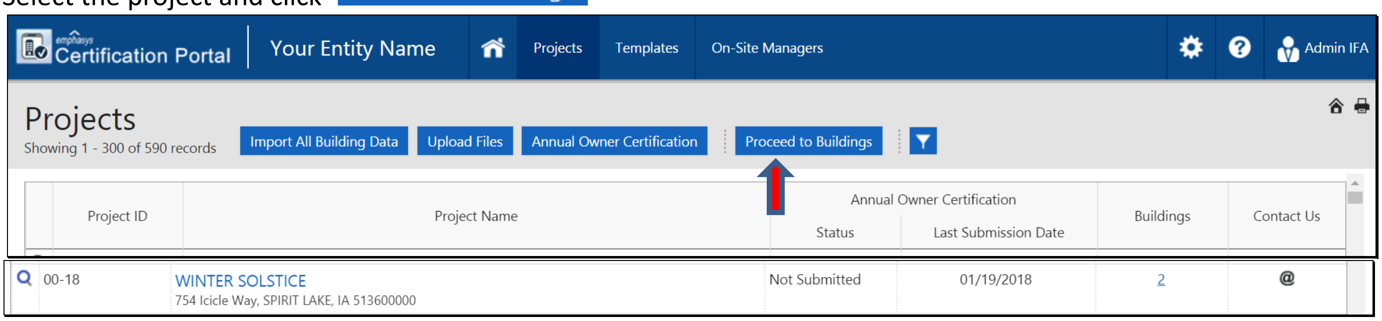
Part II First-Year Certification—Completed by Building Owners with respect to the First Year of the Credit Period

7	Eligible basis of building (see instructions)	**7**	
8a	Original qualified basis of the building at close of first year of credit period	**8a**	
b	Are you treating this building as part of a multiple building project for purposes of section 42 (see instructions)?	☐ Yes ☐ No	

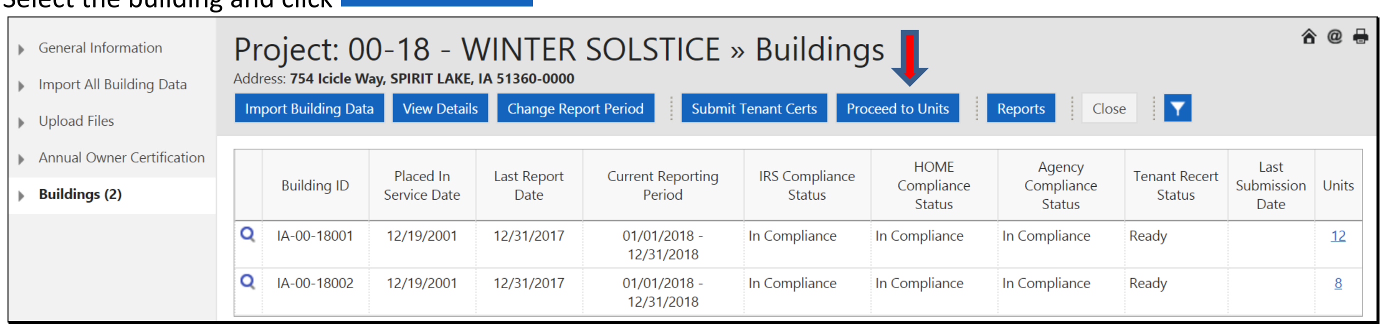
NOTE: Unit Transfers cannot occur on the same day. If the unit being transferred into, moved out the same day as the new transfer in, you will need to enter the day before as the move-out date.

TRANSFER WITHIN SAME BUILDING

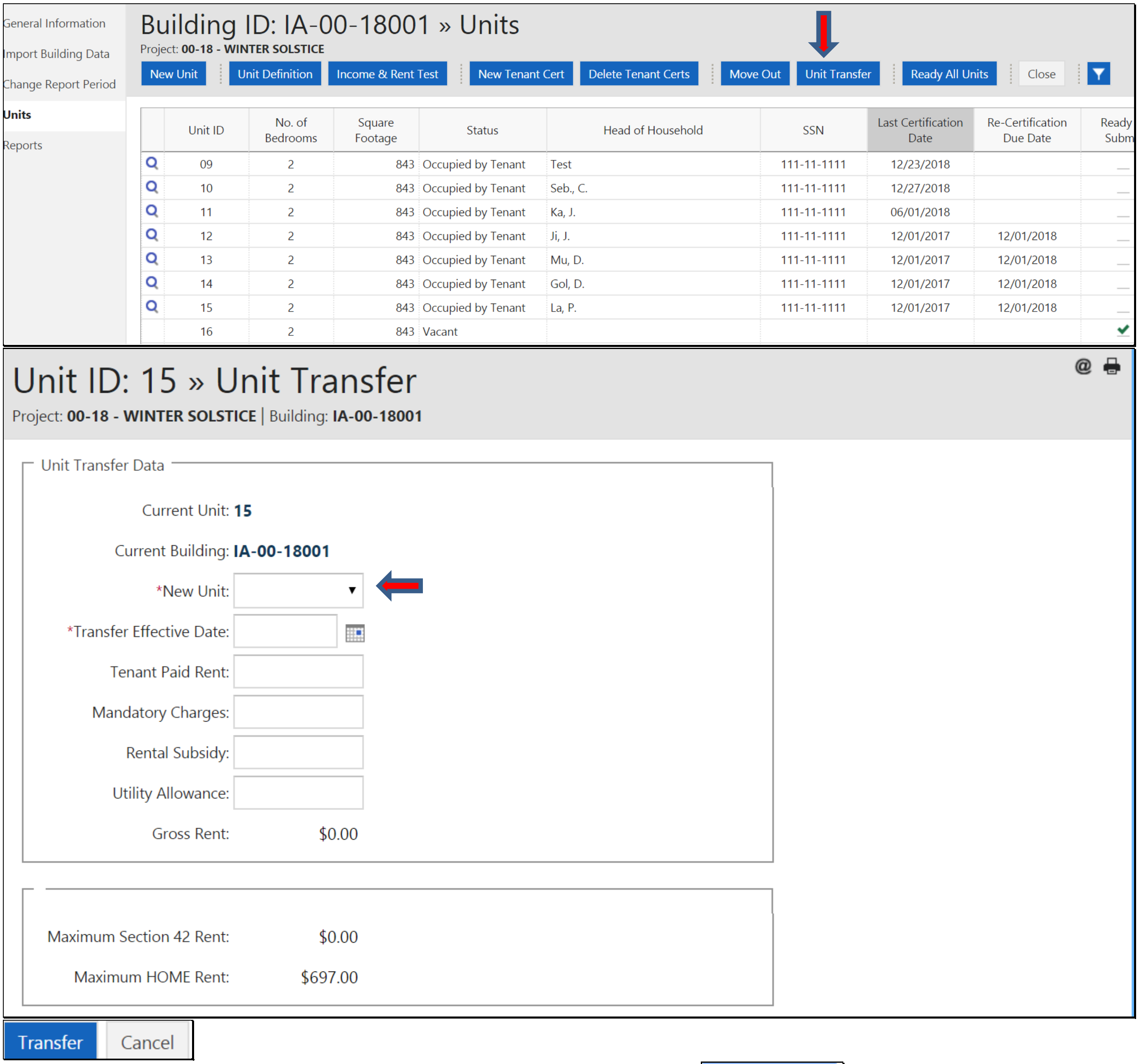
Select the project and click Proceed to Buildings

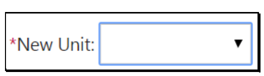


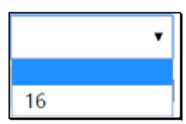
Select the building and click Proceed to Units



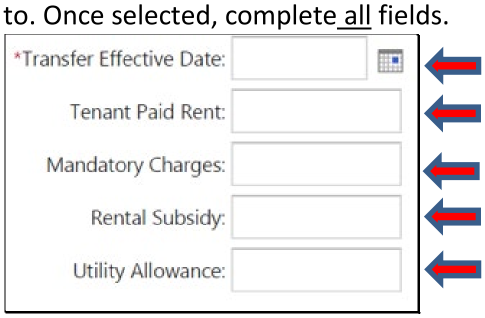
Select the unit that is transferring OUT and click Unit Transfer

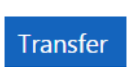


Click the down arrow in 

to show available units 

and select the unit to transfer to. Once selected, complete all fields.

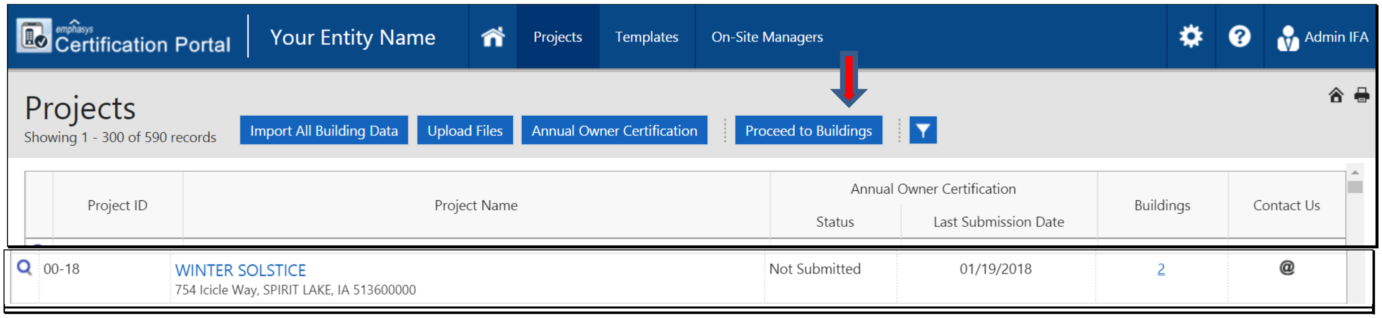


At the bottom of the page, click 

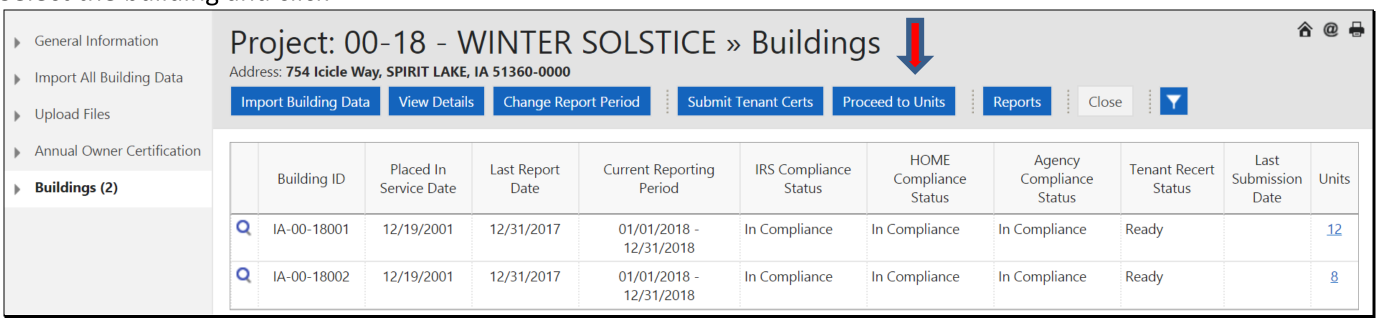
to complete the action.

TRANSFER BETWEEN BUILDINGS– Based on 8609 8b election marked "Yes".

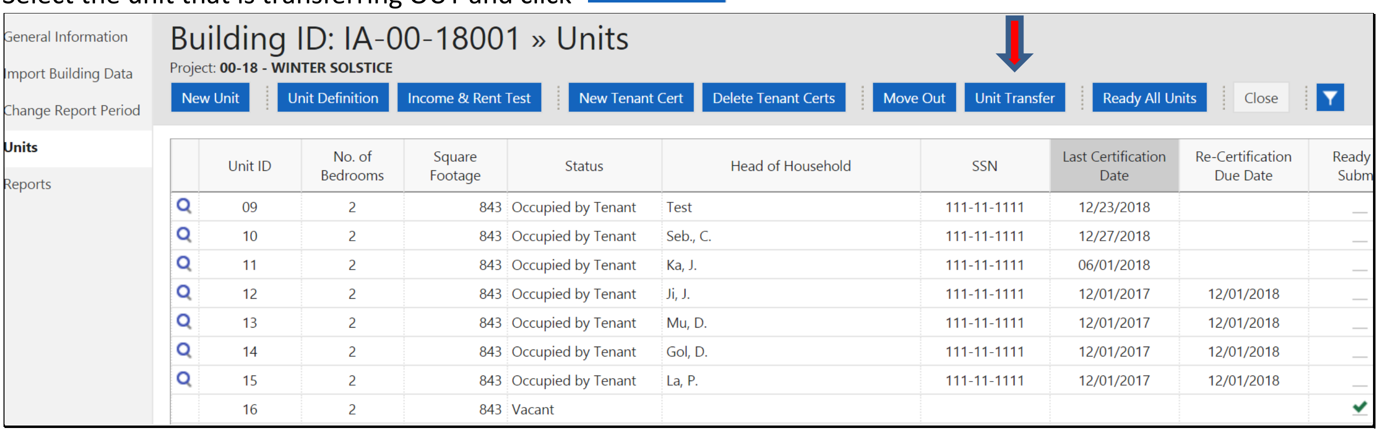
Select the project and click on **Proceed to Buildings**



Select the building and click **Proceed to Units**



Select the unit that is transferring OUT and click **Unit Transfer**



Unit ID: 10 » Unit Transfer

Project: **00-18 - WINTER SOLSTICE** | Building: **IA-00-18001**

Unit Transfer Data

Current Unit: **10**

Current Building: **IA-00-18001**

New Building ID: IA - 00 - 18001 ...

*New Unit:

*Transfer Effective Date:

Tenant Paid Rent:

Mandatory Charges:

Rental Subsidy:

Utility Allowance:

Gross Rent: $0.00

Maximum Section 42 Rent: $0.00

Maximum HOME Rent: $697.00

Click the ... at the end of the Building ID New Building ID: IA - 07 - 42001 ... to show available buildings and select the building the transfer-to is occurring.

Showing 1 - 2 of 2 records

Building ID	Address	Project ID
IA-00-18001	2300 Sunner Avenue	00-18
IA-00-18002	2302 Sunner Avenue	00-18

Click the down arrow in *New Unit: **to show available units** 16 **and select the unit to transfer to. Once selected, complete all fields**

*Transfer Effective Date:

Tenant Paid Rent:

Mandatory Charges:

Rental Subsidy:

Utility Allowance:

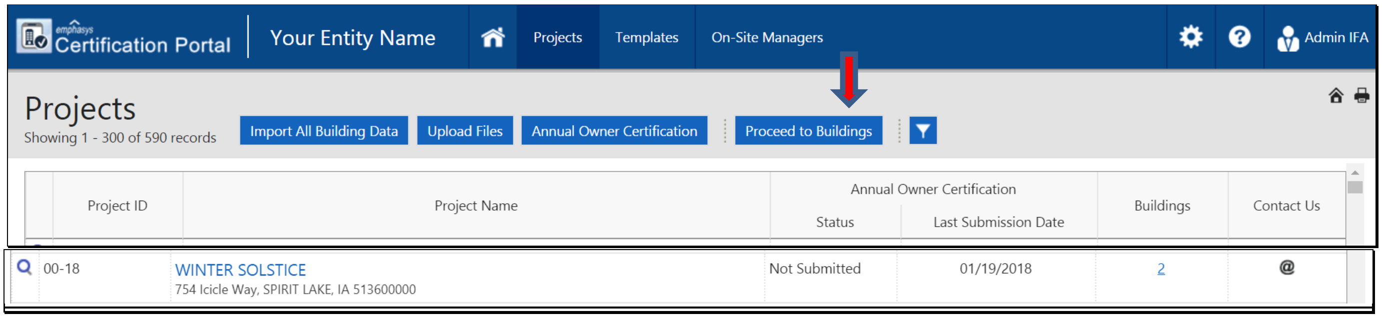
then click Transfer **at the bottom of the page.**

<u>END SECTION 5</u>

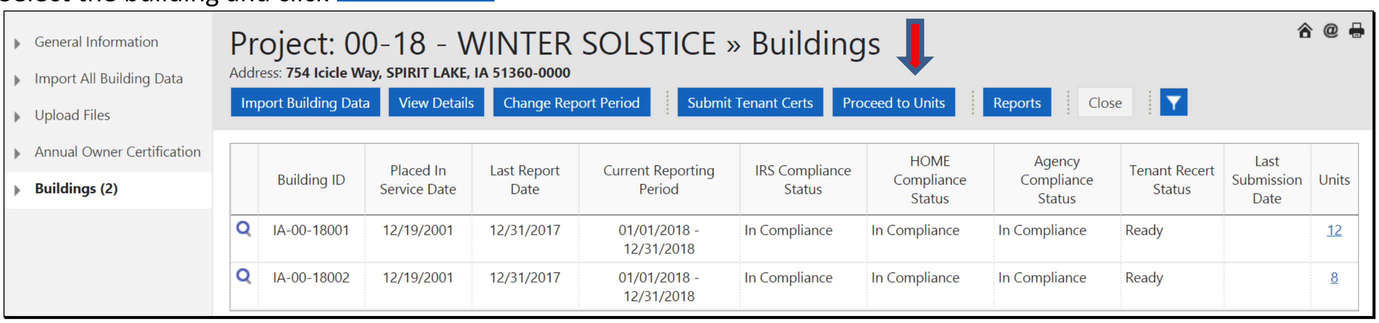
SECTION 6

MANUAL
MOVE OUT

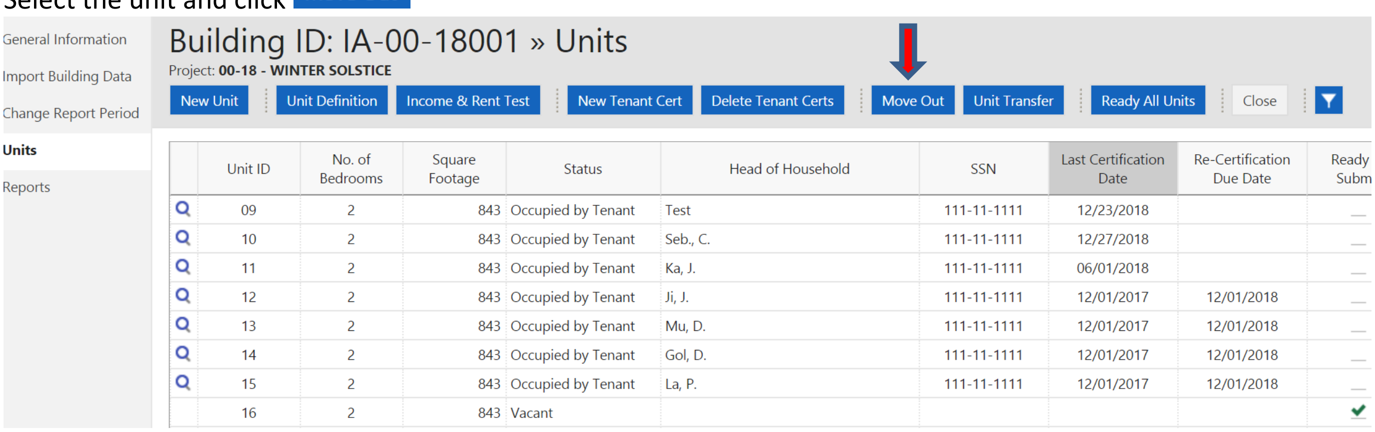
Select the project and click **Proceed to Buildings**



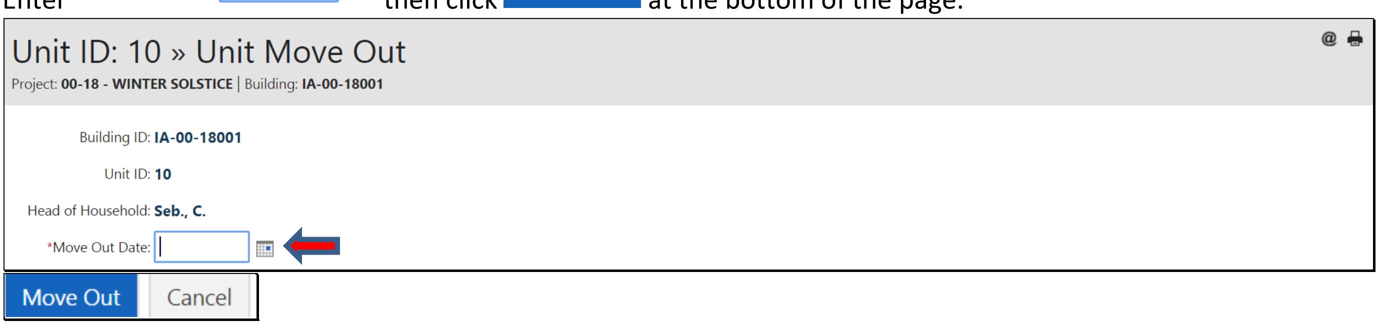
Select the building and click **Proceed to Units**



Select the unit and click **Move Out**



Enter *Move Out Date: then click **Move Out** at the bottom of the page.



End Section 6

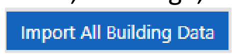
SECTION 7

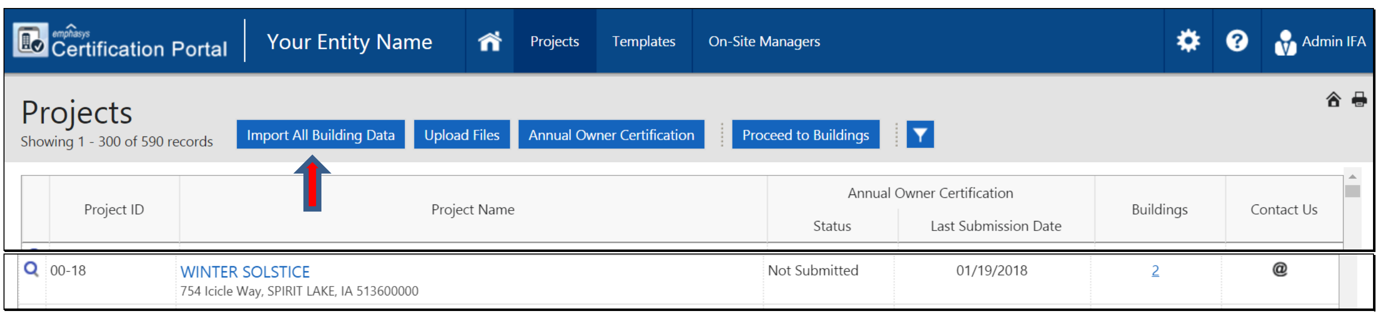
3RD PARTY SOFTWARE
TENANT DATA IMPORT

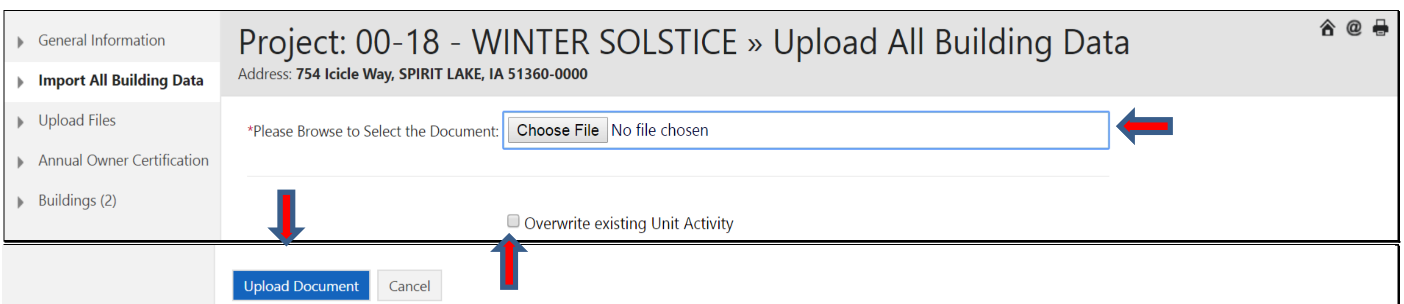
1. All Buildings – One File

2. Single Buildings – Multiple Files (based on number of buildings in project)

UPLOADING ALL BUILDING XML FILE

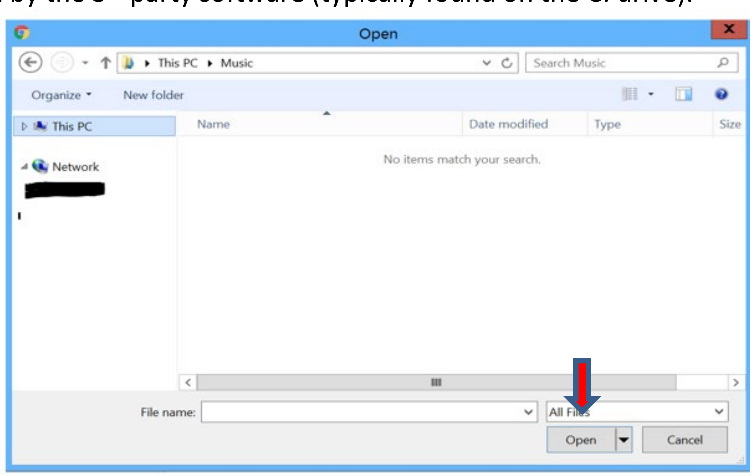
If the 3rd party software (i.e., Yardi, RealPage, etc.) creates an XML file that includes all buildings in the project, highlight the project and click 





Click on Choose File 

Select the XML file created by the 3rd party software (typically found on the C: drive).



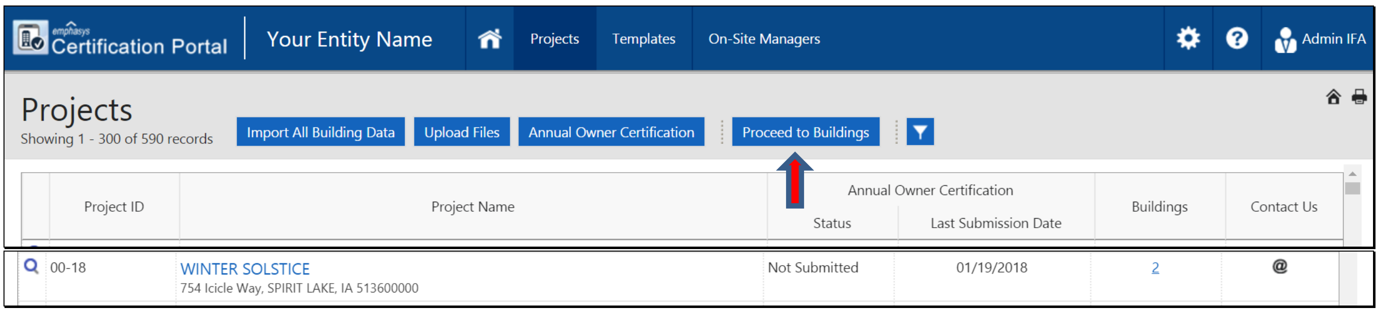
Select the XML file, click Open and click Upload Document to complete the process.
Documents can be imported multiple times for the same project as needed, due to errors. After the initial import, for any subsequent imports, you must check the box. ☐ Overwrite existing Unit Activity

NOTE: If user is unable to locate file on the computer, search for XML l and it should show up.

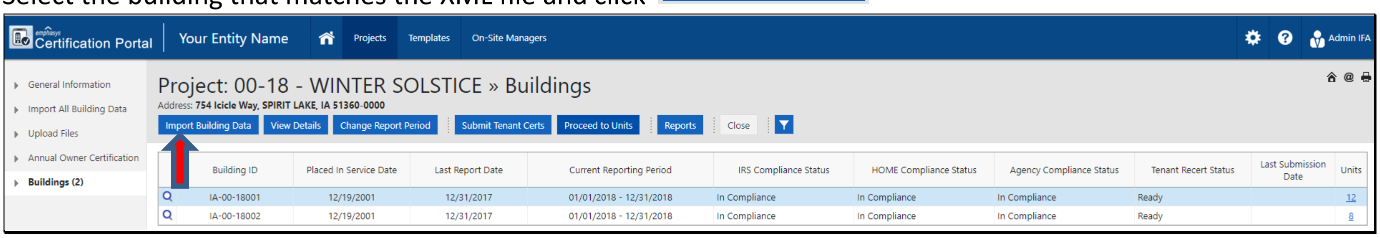
IMPORTING SINGLE BUILDING(S) – Even if multiple buildings are in the project.

If the third-party vendor makes separate XML files for each building in the project, you will need to go to the Building Screen to import each of these files.

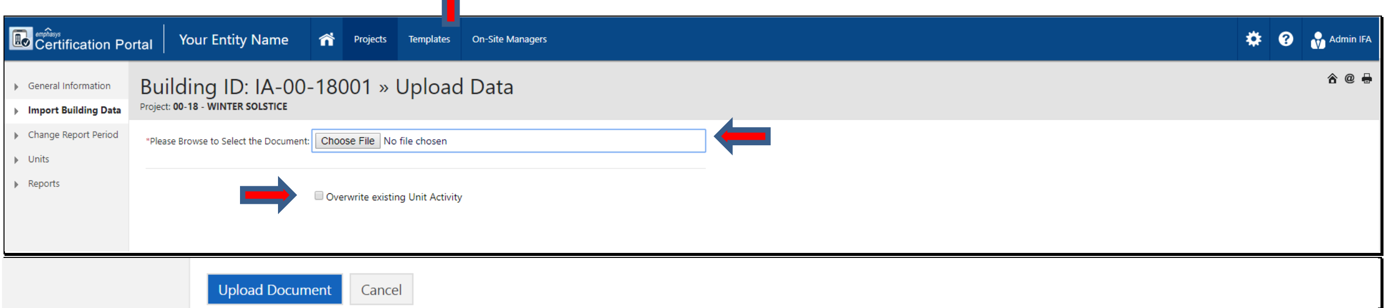
Highlight the project and click Proceed to Buildings



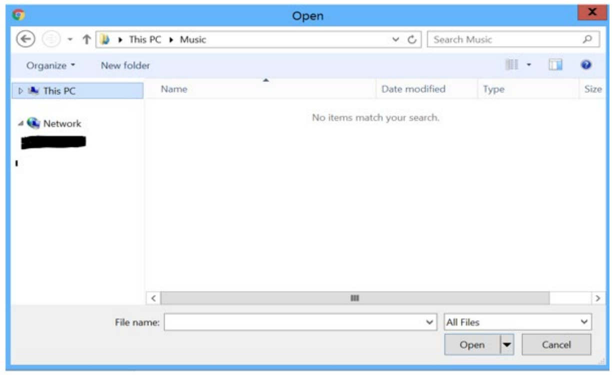
Select the building that matches the XML file and click Import Building Data



*Please Browse to Select the Document: Choose File No file chosen



Select the XML file and click Open and then click Upload Document at the bottom of the Upload screen to complete the process. This must be done for all buildings.

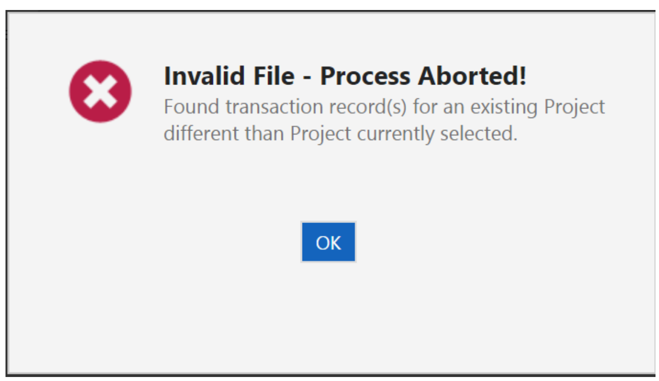


Continue this process until all buildings have been uploaded.

Go back to Proceed to Buildings and click Proceed to Units and click on Ready All Units for each building.

Documents can be uploaded multiple times for the same project as needed, due to errors. For any subsequent uploads, check the box ☐ Overwrite existing Unit Activity

If you upload incorrect BIN or Project XML file that does not belong to the selected project, this message will appear:



When an XML file has errors during import, the process will cancel and provide an Error Log (see below). If you receive an error message, provide a copy of the Error Log <u>and</u> XML file via email to the assigned IFA Compliance Officer for review, correction, and re-uploading.

Locate the correct XML file to upload or select Cancel and program will return to the building screen**.**

<u>END SECTION 7</u>

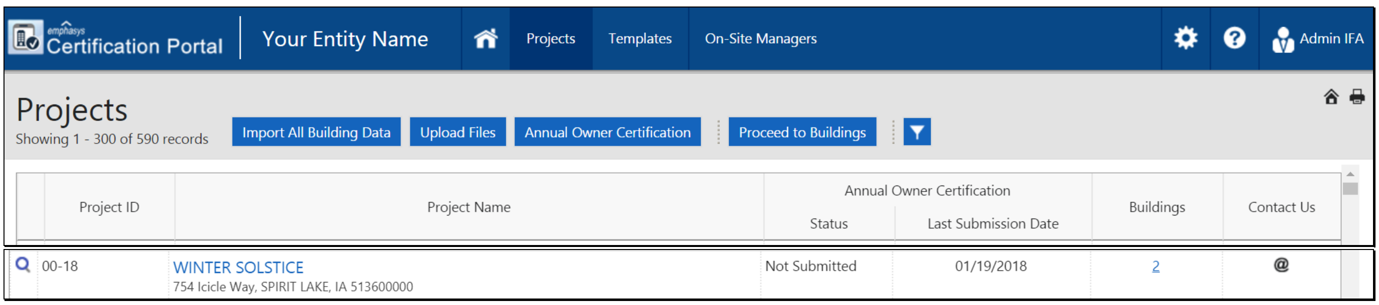
SECTION 8

Document Upload
(tenant files, inspection responses, annual reporting, etc.)

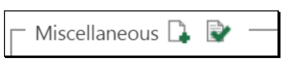
UPLOADING FILE DOCUMENTS

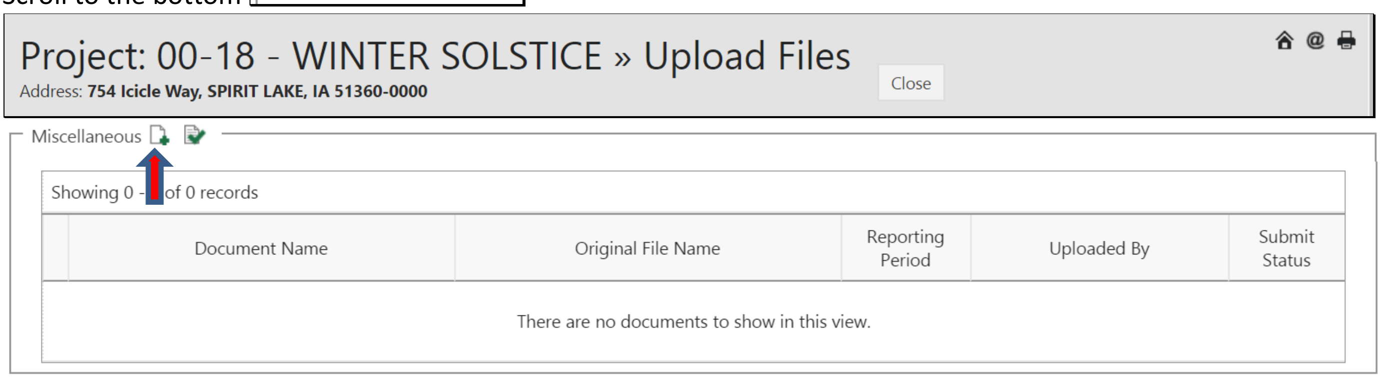
NOTE: This is different from the Upload Document above

Click on Projects to access Projects list. Select the project and click Upload Files

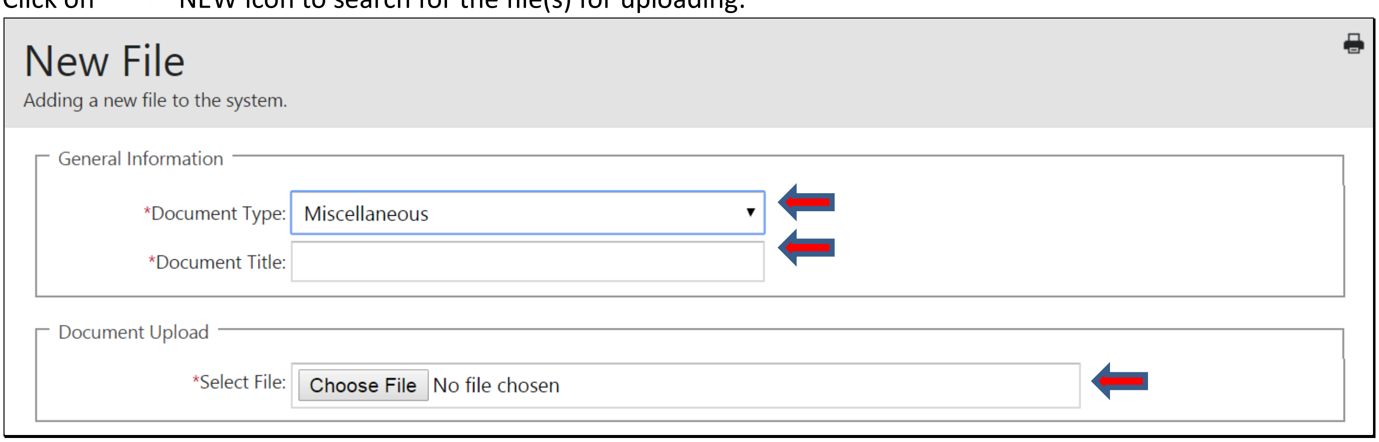


Scroll to the bottom





Click on NEW icon to search for the file(s) for uploading:

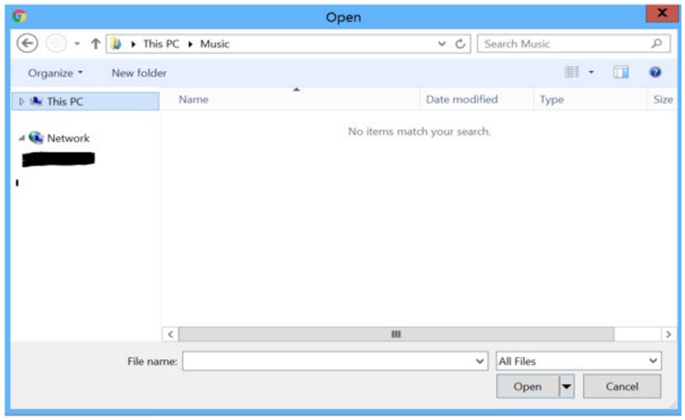


*Document Type: Miscellaneous Document Type will always be Miscellaneous

*Document Title: Document Title should clearly identify upload example: Tenant file = Unit 100 Smith

Document Upload

*Select File: Choose File No file chosen



Select File: It is best to zip the documents and upload as one file (not individual files for each unit).
NOTE: If you are unable to locate the file on the computer, search for .XML and it should show up.

Select how to proceed by using the buttons below. Buttons are at the bottom of the screen (screen must be maximized to access these).

Save | Save & New | Save & Close | Cancel

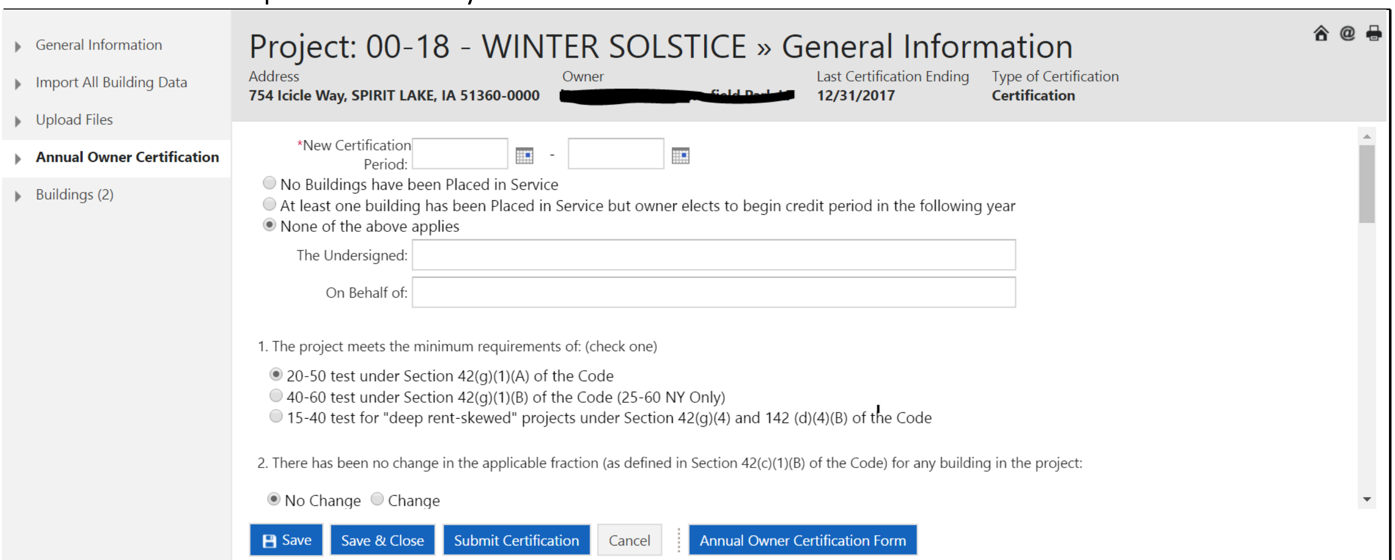
If only uploading one set of files, click Save & Close, if uploading more than one set of files, click Save & New until all files have been uploaded and then Save & Close.

End Section 8

SECTION 9
ANNUAL CERTIFICATION

Annual Owner Certification

IFA **does not review or accept** the CP system-generated Owner Certification documents. The system requires it to be submitted, to allow submission of the tenant data for each building(s). IFA has a required Owner Certification form with Exhibits which is provided annually via email and can be found on the IFA website.



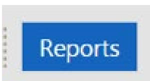
End Section 9

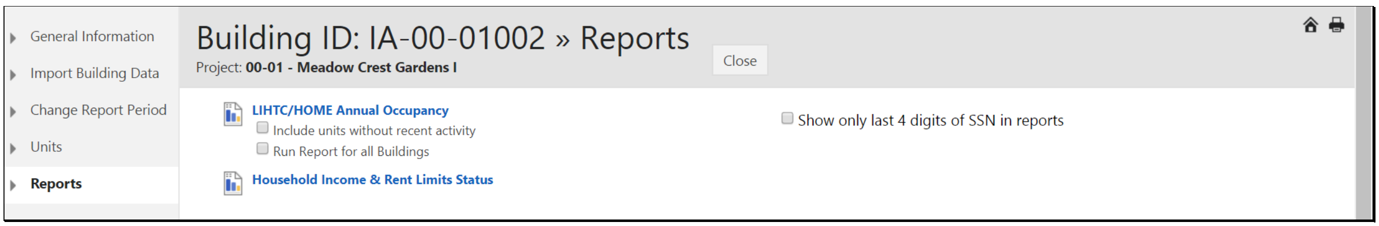
SECTION 10

REVIEWING DATA AND SUBMITTING TO IFA

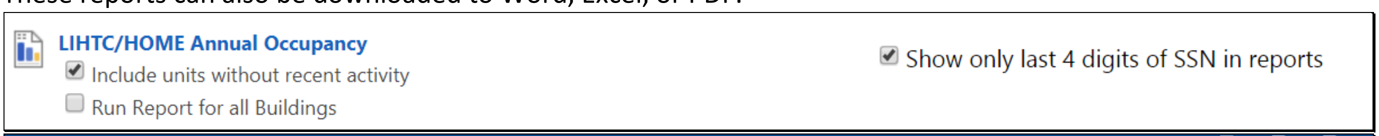
IFA highly recommends the owner/management agent review all data entry prior to submitting.

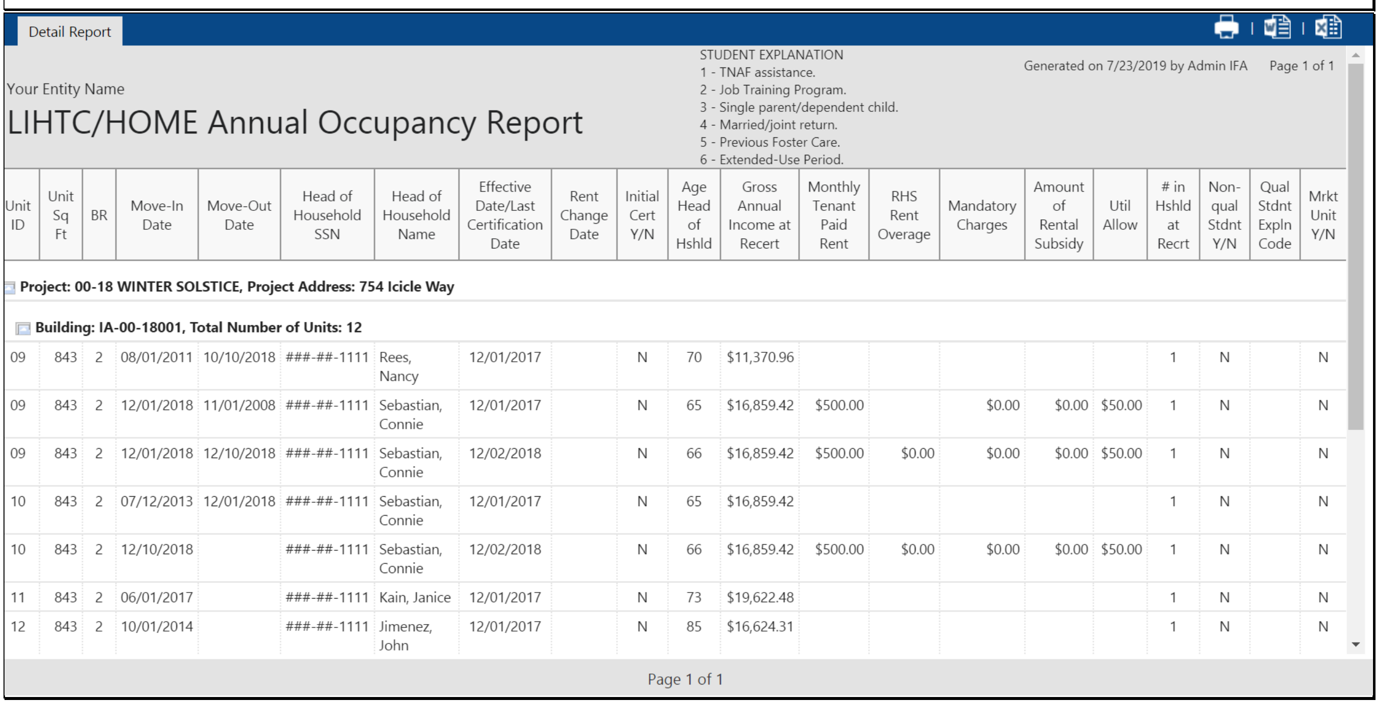
REVIEWING UNIT DATA AND READYING UNITS FOR SUBMISSION.





These reports can also be downloaded to Word, Excel, or PDF.





Your Entity Name

LIHTC/HOME Annual Occupancy Report

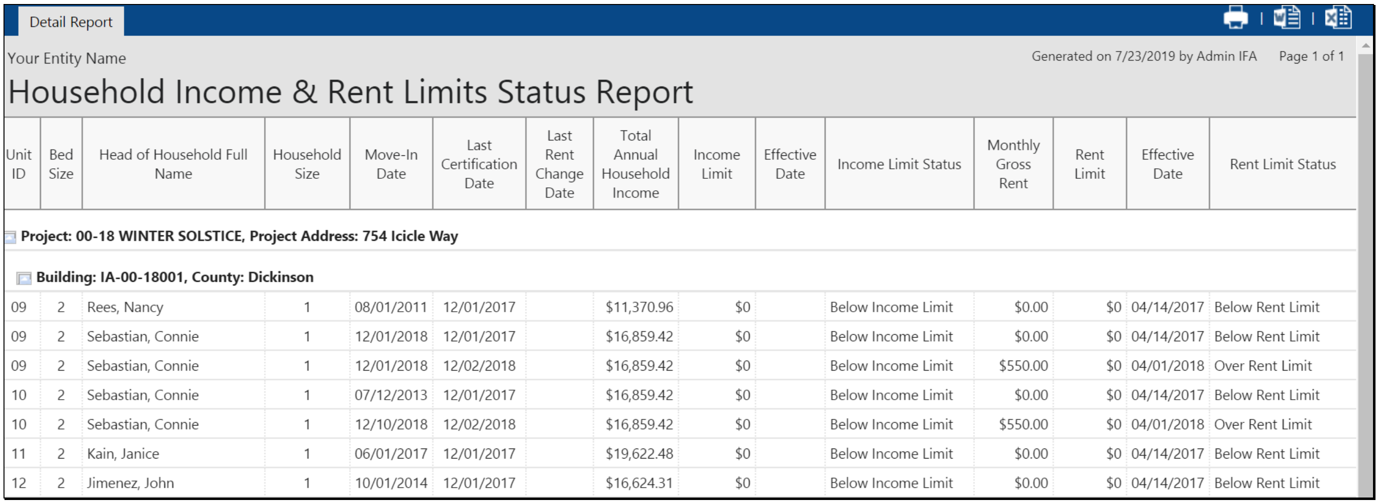
STUDENT EXPLANATION
1 - TNAF assistance.
2 - Job Training Program.
3 - Single parent/dependent child.
4 - Married/joint return.
5 - Previous Foster Care.
6 - Extended-Use Period.

Generated on 7/23/2019 by Admin IFA Page 1 of 1

Unit ID	Unit Sq Ft	BR	Move-In Date	Move-Out Date	Head of Household SSN	Head of Household Name	Effective Date/Last Certification Date	Rent Change Date	Initial Cert Y/N	Age Head of Hshld	Gross Annual Income at Recert	Monthly Tenant Paid Rent	RHS Rent Overage	Mandatory Charges	Amount of Rental Subsidy	Util Allow	# in Hshld at Recrt	Non-qual Stdnt Y/N	Qual Stdnt Expln Code	Mrkt Unit Y/N
Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way																				
Building: IA-00-18001, Total Number of Units: 12																				
09	843	2	08/01/2011	10/10/2018	###-##-1111	Rees, Nancy	12/01/2017		N	70	$11,370.96						1	N		N
09	843	2	12/01/2018	11/01/2008	###-##-1111	Sebastian, Connie	12/01/2017		N	65	$16,859.42	$500.00		$0.00	$0.00	$50.00	1	N		N
09	843	2	12/01/2018	12/10/2018	###-##-1111	Sebastian, Connie	12/02/2018		N	66	$16,859.42	$500.00	$0.00	$0.00	$0.00	$50.00	1	N		N
10	843	2	07/12/2013	12/01/2018	###-##-1111	Sebastian, Connie	12/01/2017		N	65	$16,859.42						1	N		N
10	843	2	12/10/2018		###-##-1111	Sebastian, Connie	12/02/2018		N	66	$16,859.42	$500.00	$0.00	$0.00	$0.00	$50.00	1	N		N
11	843	2	06/01/2017		###-##-1111	Kain, Janice	12/01/2017		N	73	$19,622.48						1	N		N
12	843	2	10/01/2014		###-##-1111	Jimenez, John	12/01/2017		N	85	$16,624.31						1	N		N

Page 1 of 1

Household Income & Rent Limits Status



Detail Report

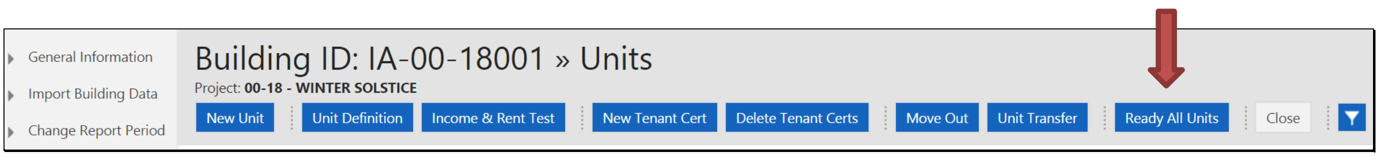
Your Entity Name

Generated on 7/23/2019 by Admin IFA Page 1 of 1

Household Income & Rent Limits Status Report

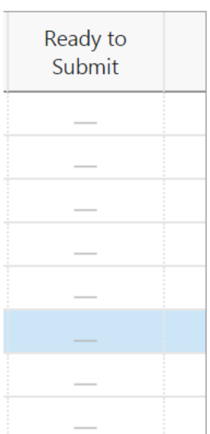
Unit ID	Bed Size	Head of Household Full Name	Household Size	Move-In Date	Last Certification Date	Last Rent Change Date	Total Annual Household Income	Income Limit	Effective Date	Income Limit Status	Monthly Gross Rent	Rent Limit	Effective Date	Rent Limit Status
Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way														
Building: IA-00-18001, County: Dickinson														
09	2	Rees, Nancy	1	08/01/2011	12/01/2017		$11,370.96	$0		Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
09	2	Sebastian, Connie	1	12/01/2018	12/01/2017		$16,859.42	$0		Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
09	2	Sebastian, Connie	1	12/01/2018	12/02/2018		$16,859.42	$0		Below Income Limit	$550.00	$0	04/01/2018	Over Rent Limit
10	2	Sebastian, Connie	1	07/12/2013	12/01/2017		$16,859.42	$0		Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
10	2	Sebastian, Connie	1	12/10/2018	12/02/2018		$16,859.42	$0		Below Income Limit	$550.00	$0	04/01/2018	Over Rent Limit
11	2	Kain, Janice	1	06/01/2017	12/01/2017		$19,622.48	$0		Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
12	2	Jimenez, John	1	10/01/2014	12/01/2017		$16,624.31	$0		Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit

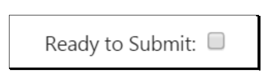
Once the data has been reviewed there are two ways to make a unit *Ready to Submit.*



At the BUILDING level screen:

Click Ready All Units This allows the building to be submitted to the agency. When using 3rd party uploads, this is the preferred method to ready the units. Manual entries can also use this process by waiting until they have entered all unit data for the building(s).



Or you can *Ready the Unit* each unit at the UNIT level screen. Select 

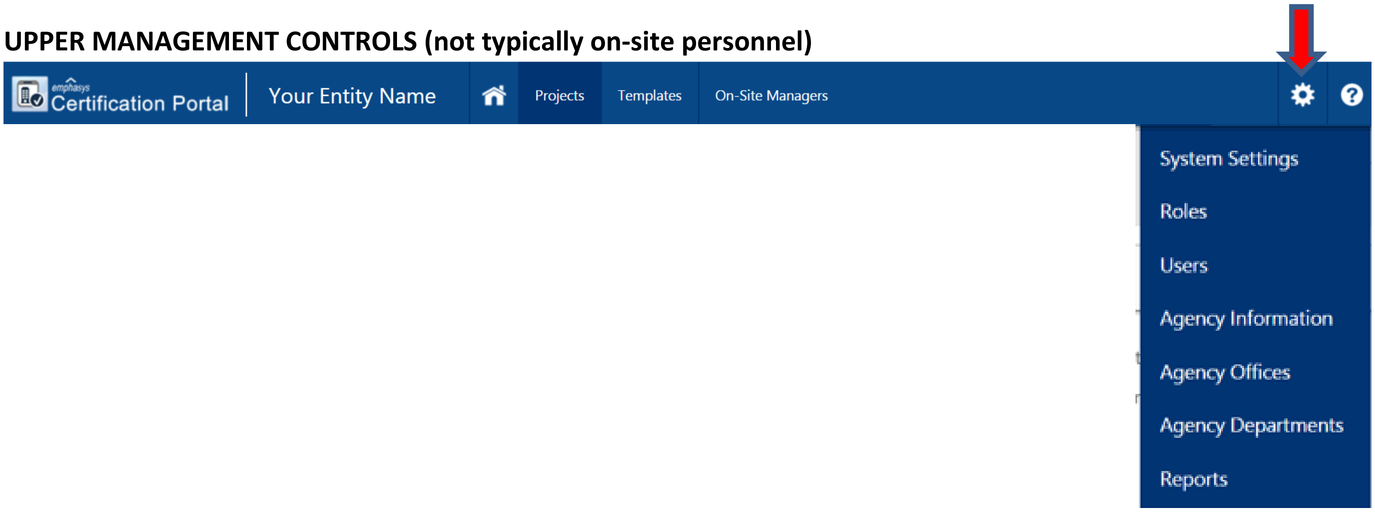
while in unit's General Information screen. Click Save after checking box.

END SECTION 10

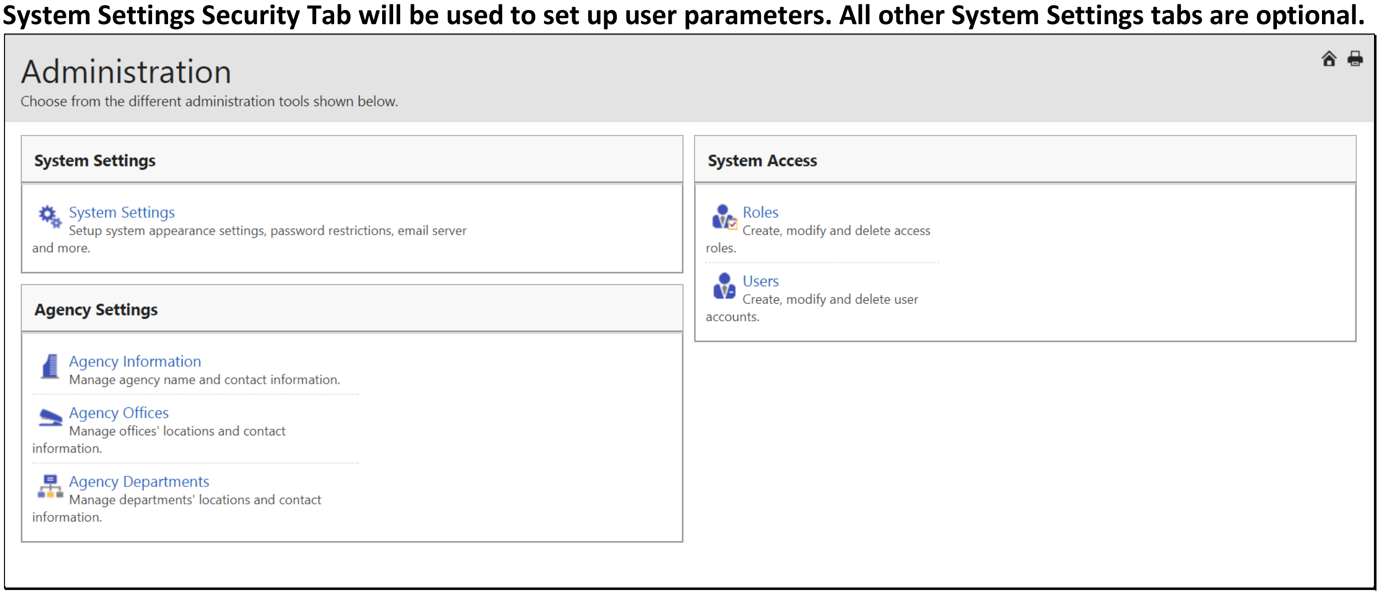
SECTION 11

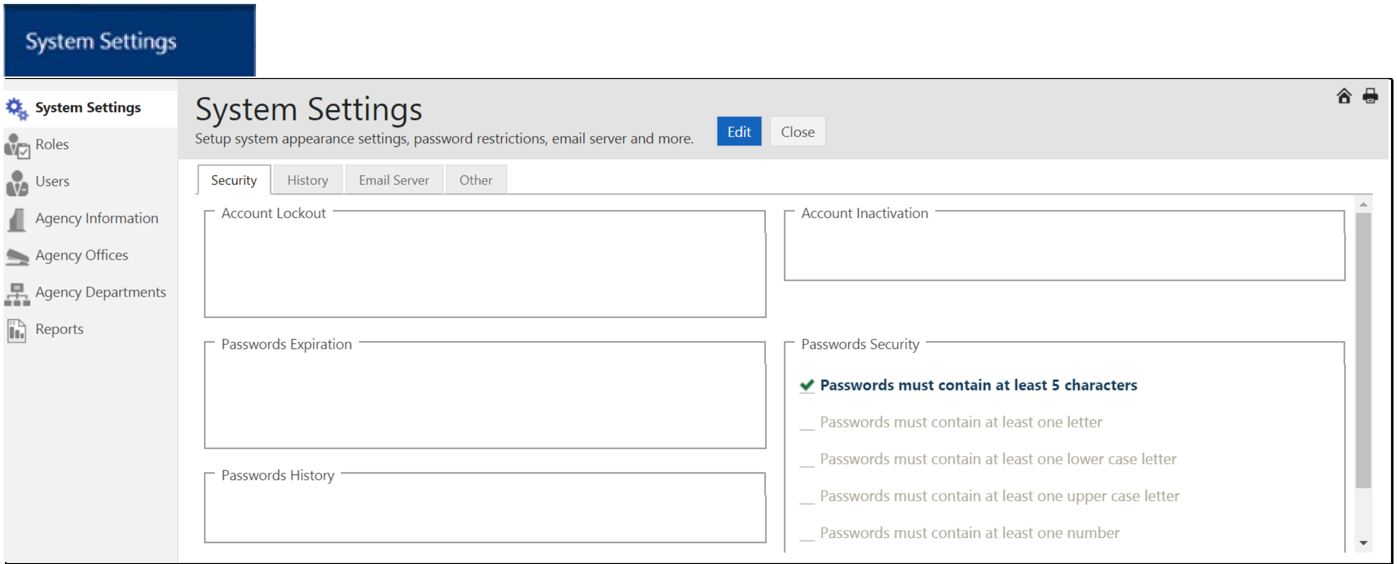
MANAGEMENT CONTROLS
(SUPER USER)

UPPER MANAGEMENT CONTROLS (not typically on-site personnel)

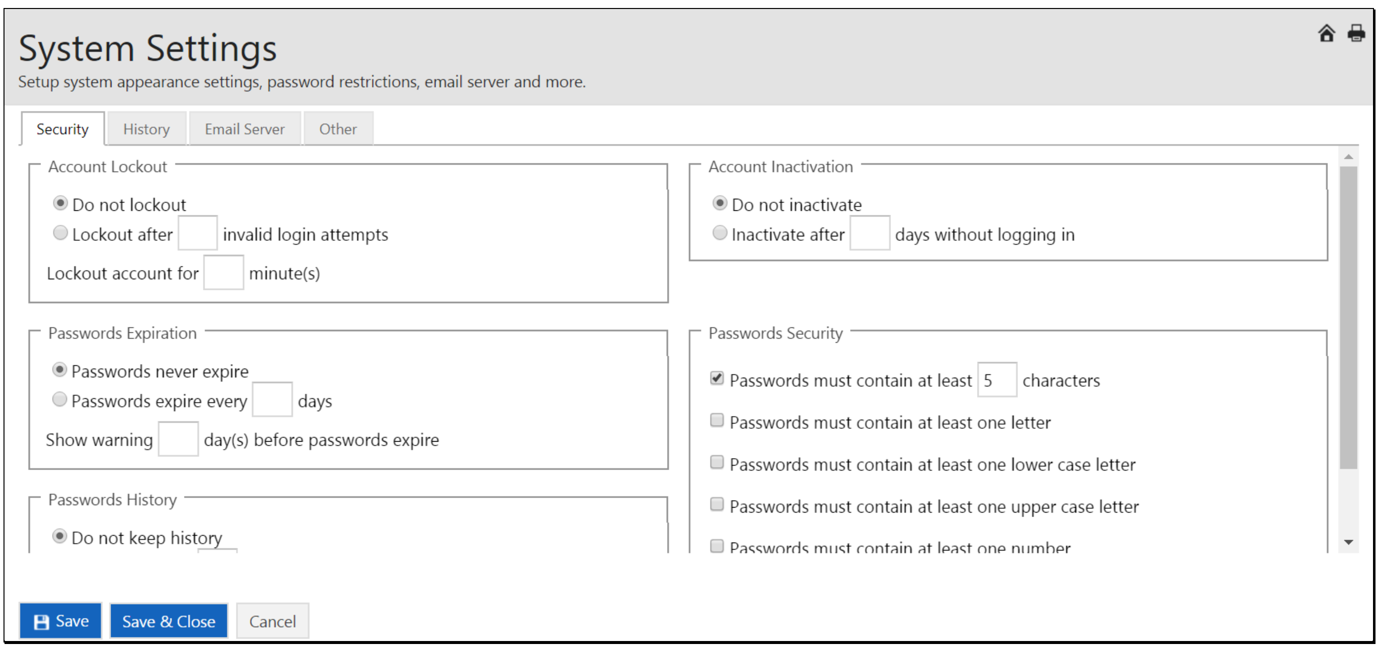


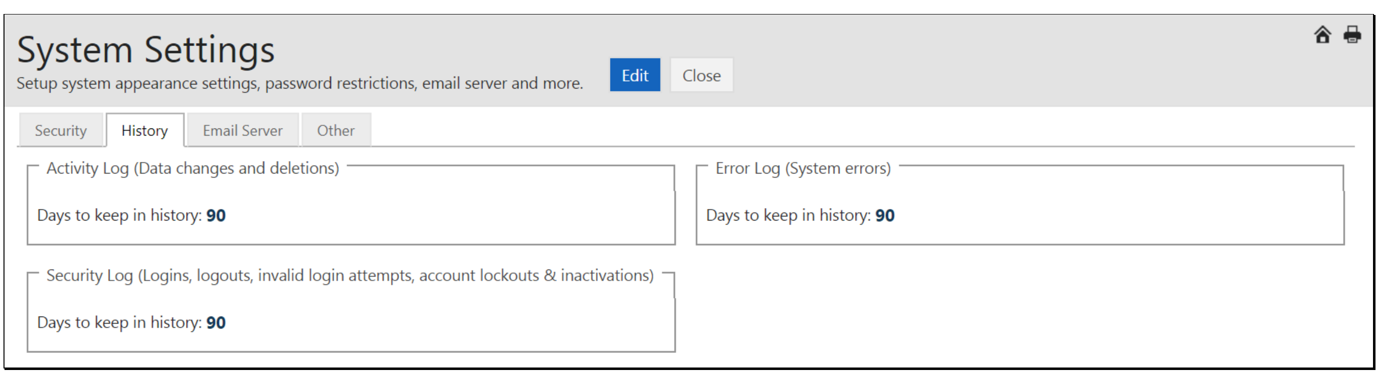
System Settings Security Tab will be used to set up user parameters. All other System Settings tabs are optional.



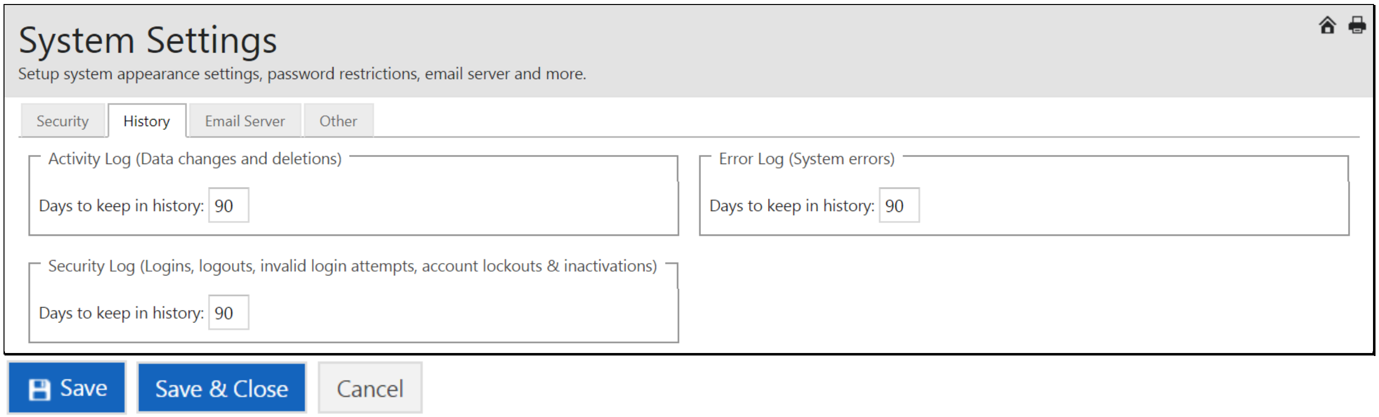

System Settings
System Settings
Roles
Users
Agency Information
Agency Offices
Agency Departments
Reports
System Settings
Setup system appearance settings, password restrictions, email server and more.
Edit
Close
Security
History
Email Server
Other
Account Lockout
Account Inactivation
Passwords Expiration
Passwords Security
Passwords must contain at least 5 characters
Passwords must contain at least one letter
Passwords must contain at least one lower case letter
Passwords must contain at least one upper case letter
Passwords must contain at least one number
Passwords History

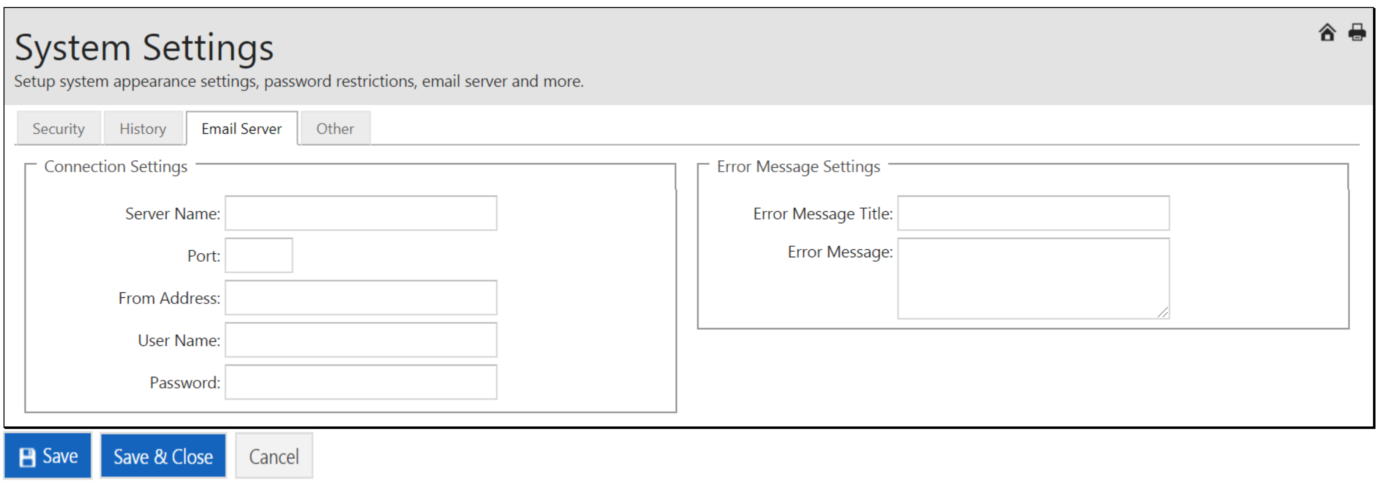
Click 
Edit

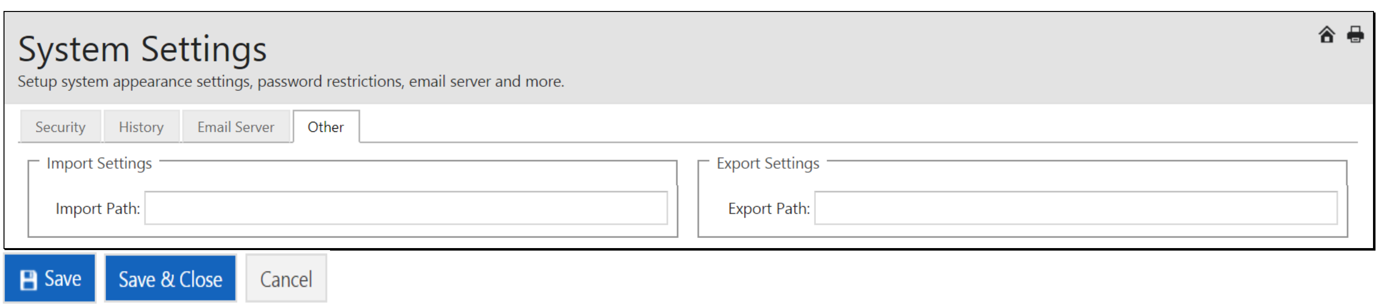

System Settings
Setup system appearance settings, password restrictions, email server and more.
Security
History
Email Server
Other
Account Lockout
Do not lockout
Lockout after invalid login attempts
Lockout account for minute(s)
Account Inactivation
Do not inactivate
Inactivate after days without logging in
Passwords Expiration
Passwords never expire
Passwords expire every days
Show warning day(s) before passwords expire
Passwords Security
Passwords must contain at least 5 characters
Passwords must contain at least one letter
Passwords must contain at least one lower case letter
Passwords must contain at least one upper case letter
Passwords must contain at least one number
Passwords History
Do not keep history
Save
Save & Close
Cancel


System Settings
Setup system appearance settings, password restrictions, email server and more.
Edit
Close
Security
History
Email Server
Other
Activity Log (Data changes and deletions)
Days to keep in history: 90
Error Log (System errors)
Days to keep in history: 90
Security Log (Logins, logouts, invalid login attempts, account lockouts & inactivations)
Days to keep in history: 90

Click 

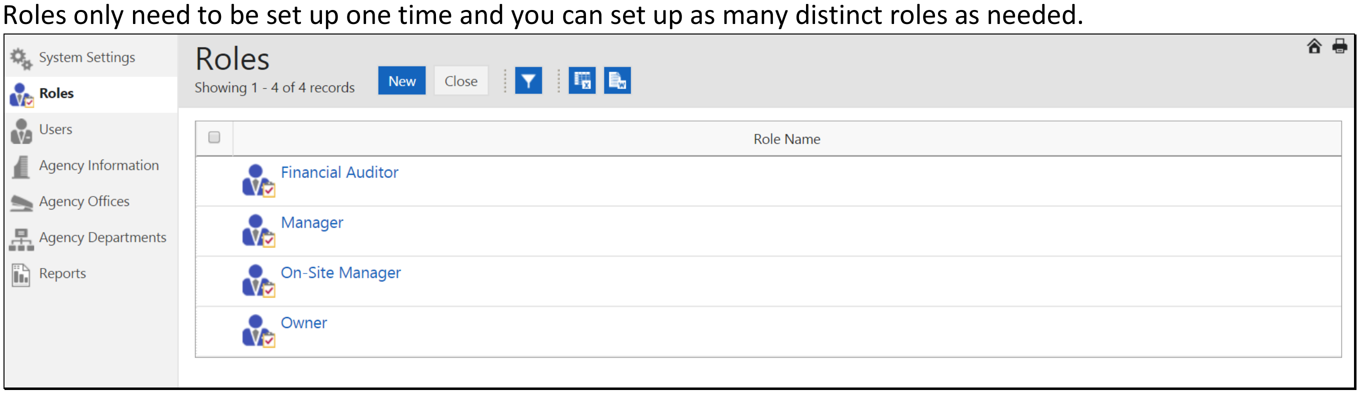


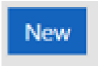


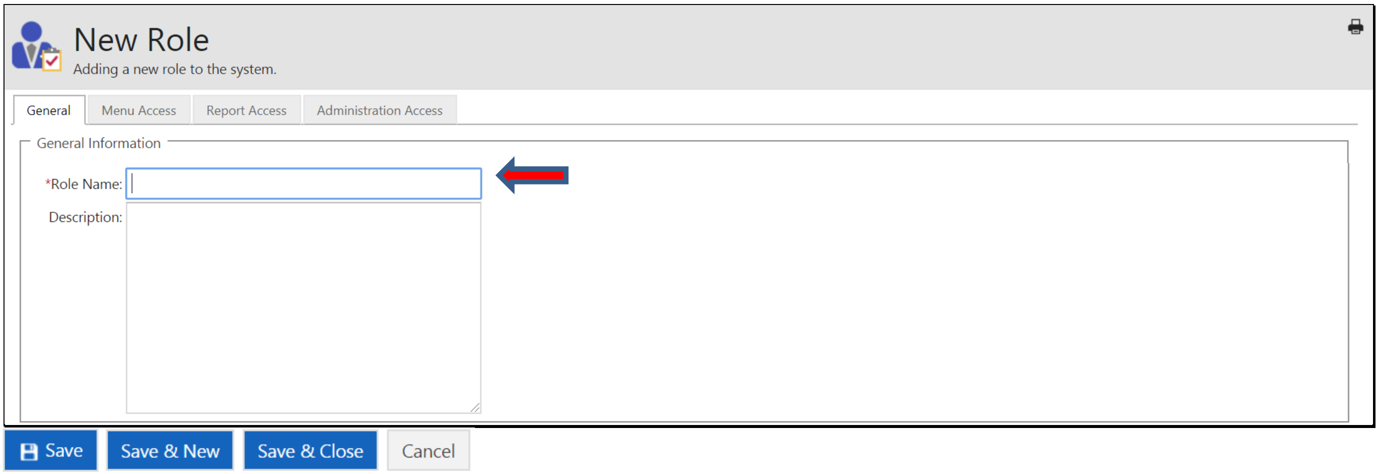


Setting up Roles to assign to individuals.

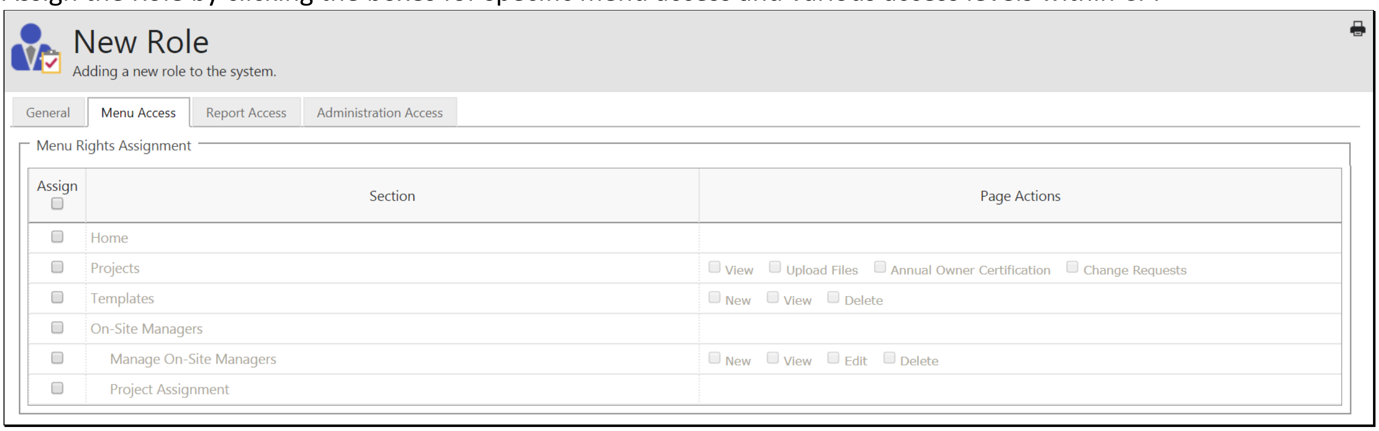
Roles only need to be set up one time and you can set up as many distinct roles as needed.



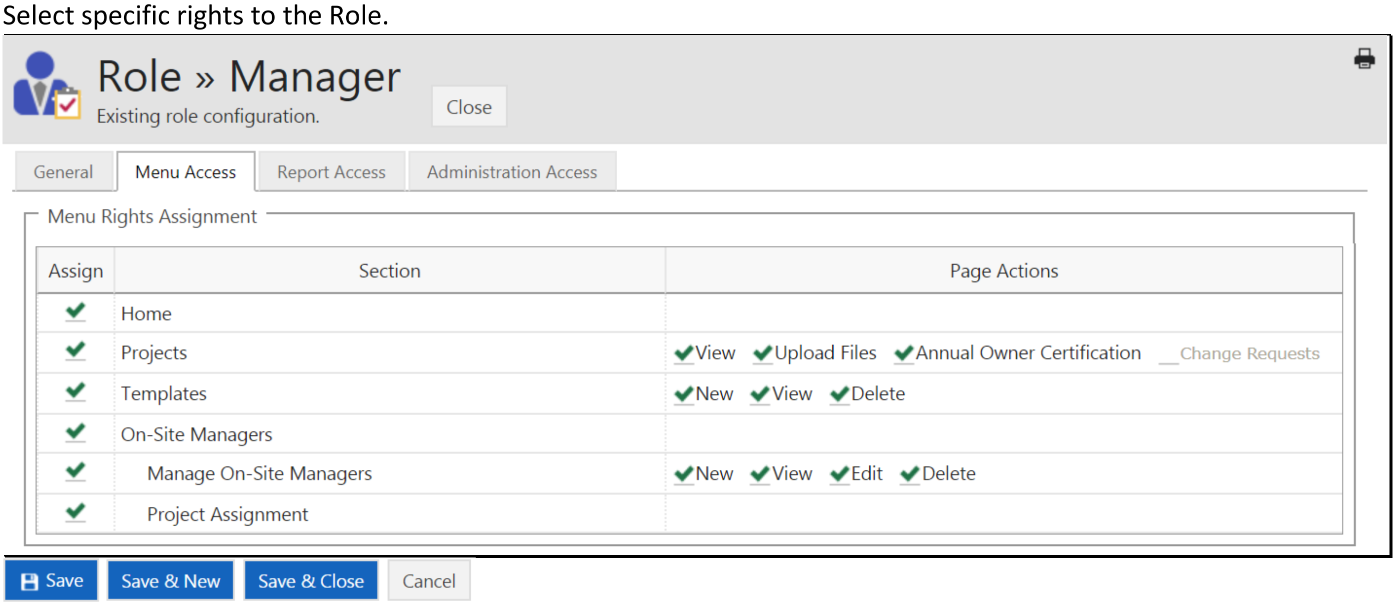
Click 



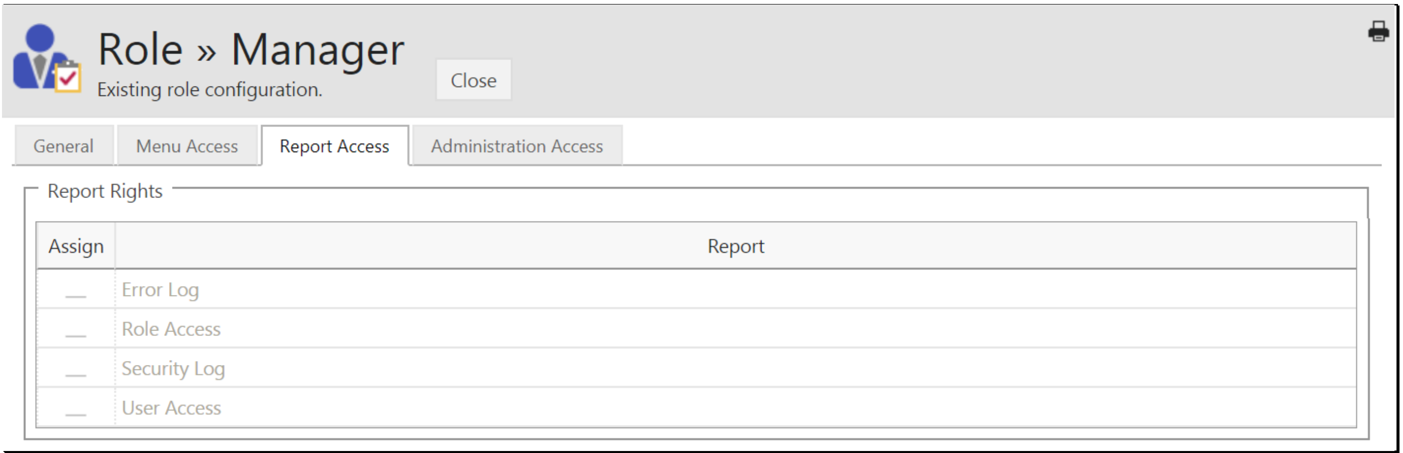
Assign the Role by clicking the boxes for specific menu access and various access levels within CP.



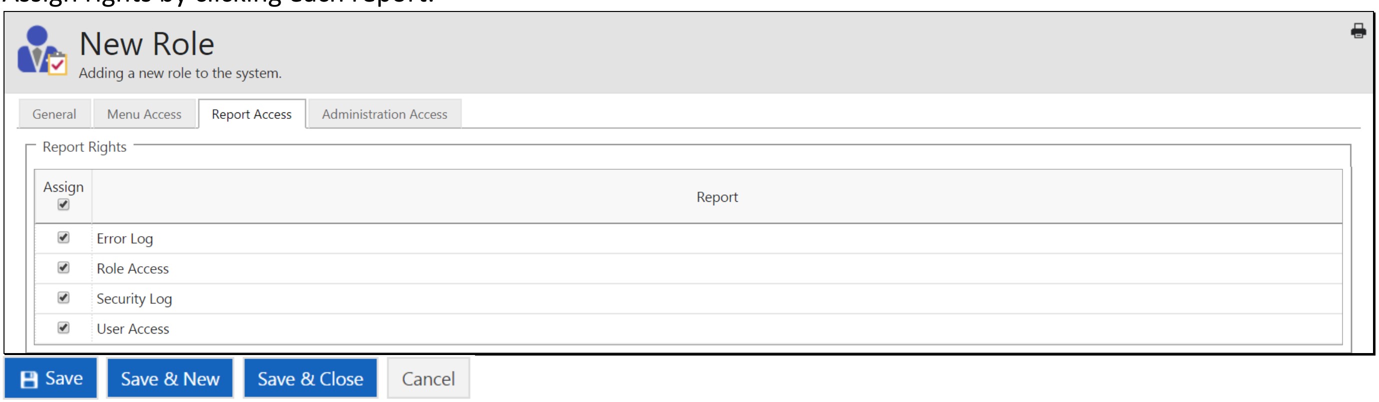
Select specific rights to the Role.



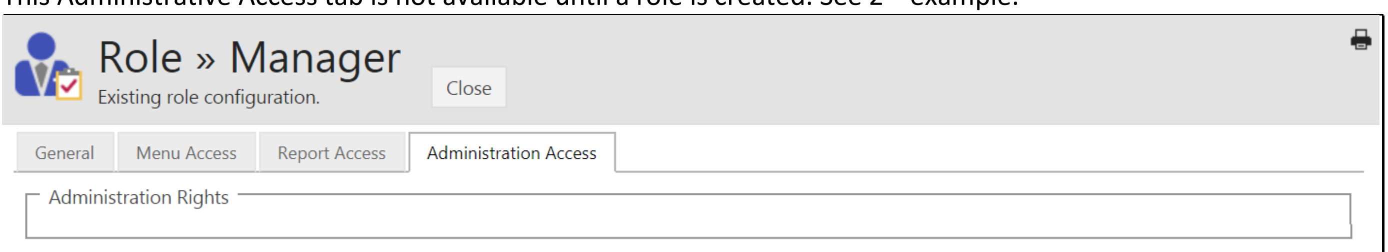
Set up Report Access for the Role.



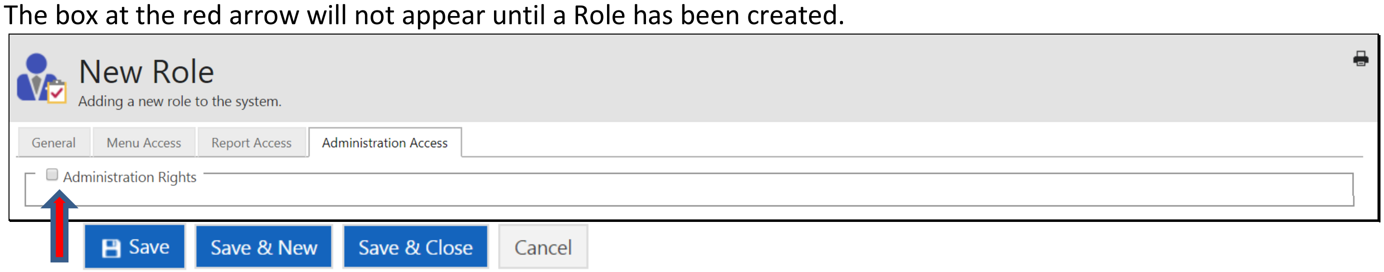
Assign rights by clicking each report.

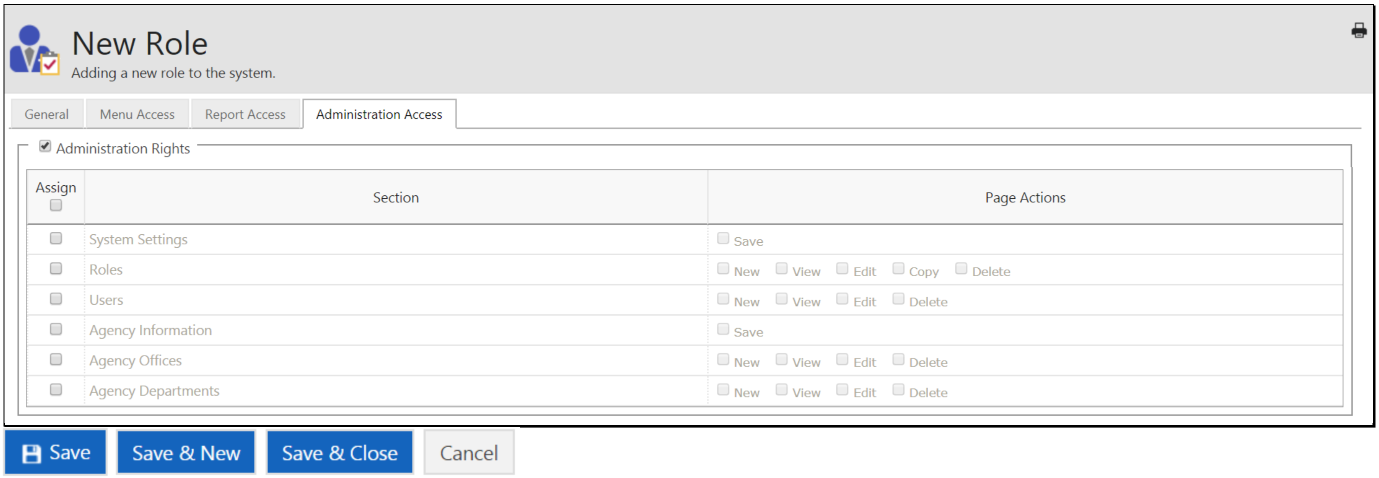


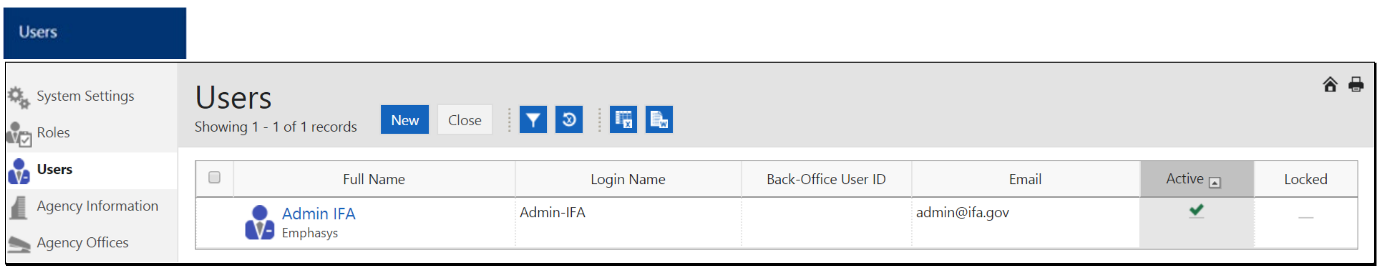
This Administrative Access tab is not available until a role is created. See 2nd example.

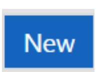


The box at the red arrow will not appear until a Role has been created.

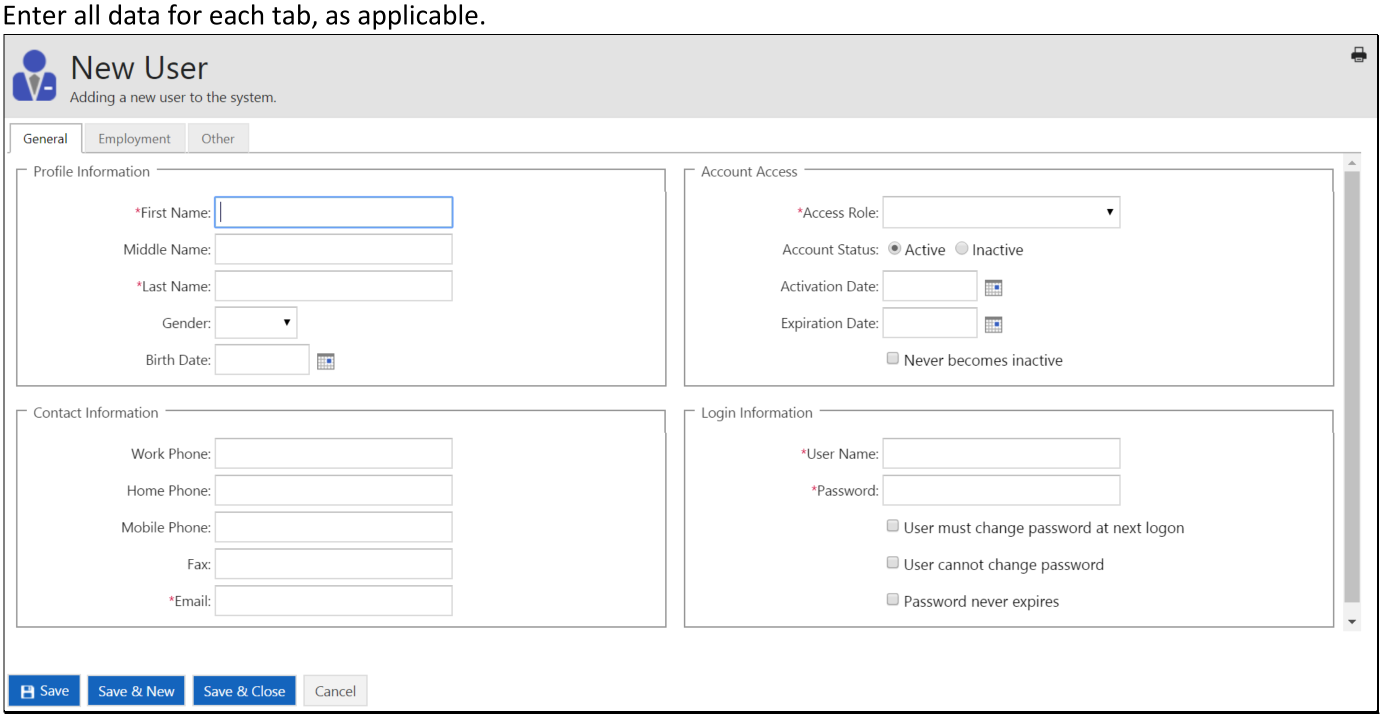




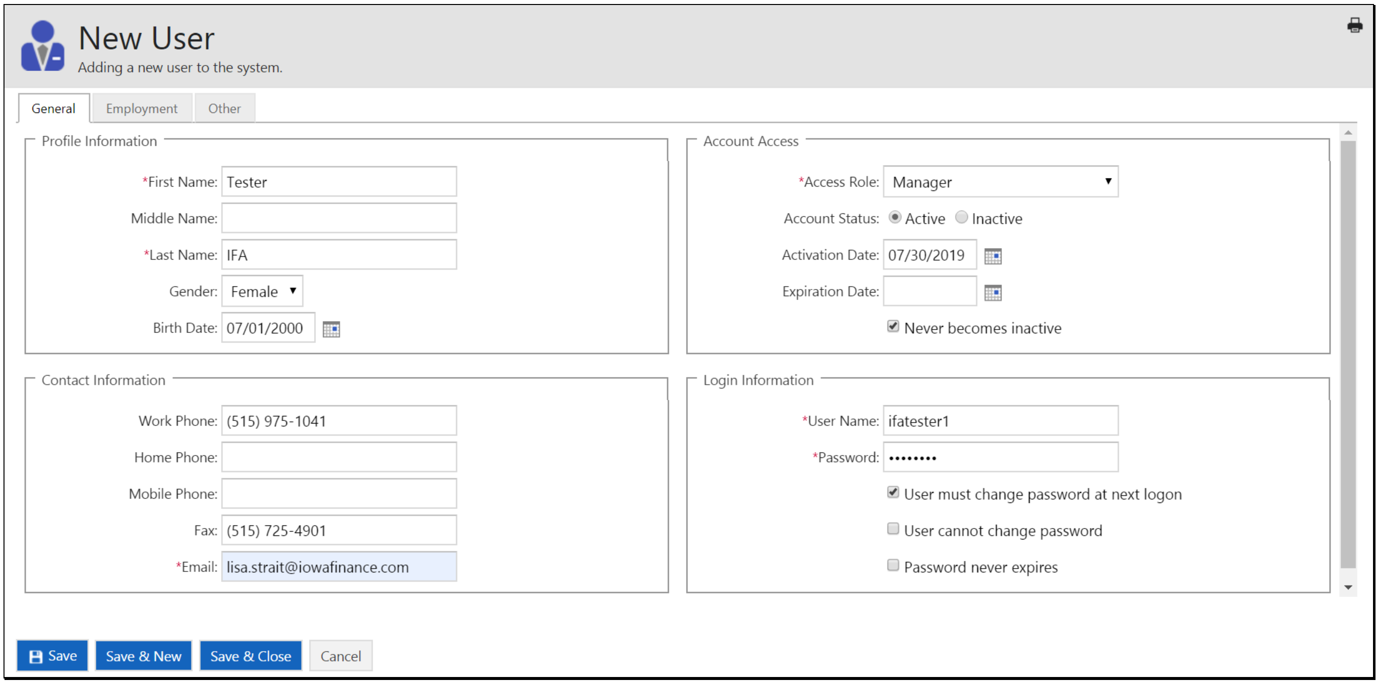




Enter all data for each tab, as applicable.

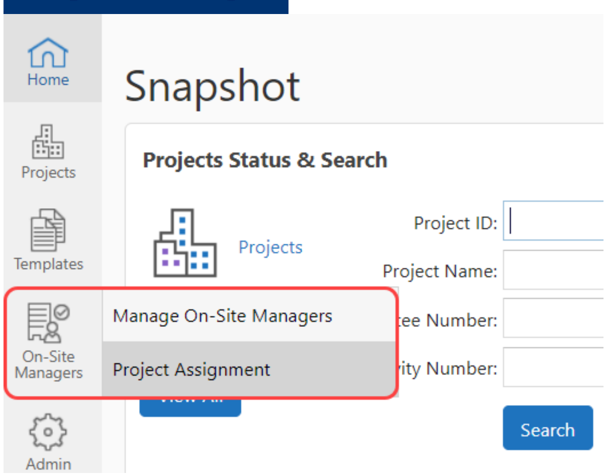


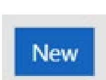
Click Save to close screen, Save & New to create additional users, or Save & Close to go back to main screen.

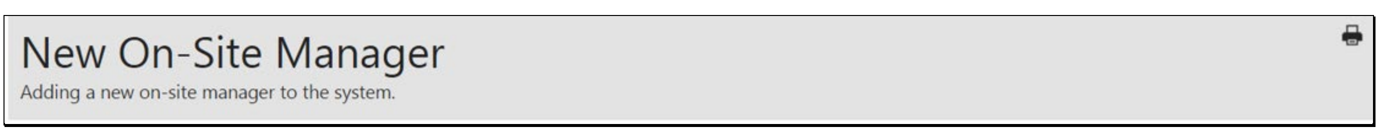


Adding Users

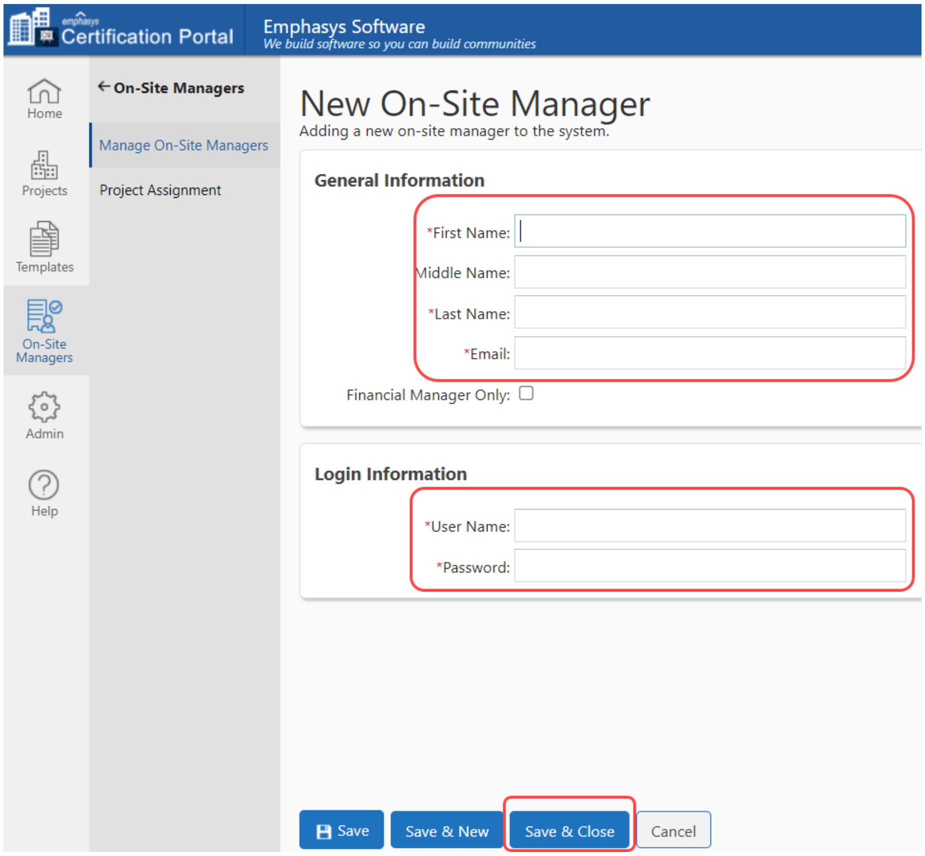
First, the Super User will add the On-Site Manager:



Click 



NOTE: The username and password fields require at least 6 characters and are case sensitive.



Once you have added in the On-Site Manager, go back into ***Project Assignment*** and update: