eSite Report User Account Creation and Maintenance

Procedure Number: SOP # 3.2.3.5 (E27)
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1. Title

eSite Report User Account Creation and Maintenance

2. Purpose

To fulfill the CO-OPS metadata workflow requirements, the eSite interface has been developed to submit site reports electronically. This Standard Operating Procedure (SOP) is intended to provide guidance for applying for and configuring user access to the eSite interface.

3. Background/History

The eSite Report interface is a tool which allows field crew personnel, whom regularly perform maintenance of CO-OPS water level stations, to submit station metadata to the Configuration Operational Engineering Team (OET). OET inserts this metadata into the database by approving the eSite report submitted and advanced by the field crew. Through the CO-OPS Application Access Management (AAM) tool, CO-OPS employees and contractors can be granted access to the eSite interface so that field maintenance metadata is submitted to CO-OPS in a standardized manner. This SOP details the procedures for assigning username(s) and password(s) to CO-OPS employees and contractors using the AAM tool. It also provides instructions and guidance on how to assign various access levels to build or submit an eSite report.

4. **Scope/Applicability**

This SOP applies to the following:
- OET who have the responsibility of creating and maintaining user accounts for contractors.
- Field personnel such as the Field Operations Division (FOD), OCS/NGS contractors performing hydrographic and photogrammetric surveys, and CO-OPS IDIQ contractors. These field crew personnel who need access to the eSite application must follow the procedures outlined in this SOP to acquire accounts.
- CO-OPS Task Managers and Contract Officer's Representative (COR) should be familiar with this SOP since they are the communication channel for information transfer between CO-OPS and contractors.

5. **Main Processes**

When a newly hired CO-OPS employee or an existing employee has been assigned work that requires access to eSite, the employee must email OET to ensure that his contact information is in Data Management System (DMS) and to request the web link to the AAM tool. OET then ensures that DMS is properly configured so that the employee can use the AAM tool to register for an account.

When a contract to install/maintain/remove a CO-OPS water level station has been awarded, a CO-OPS Task Manager is selected. The Task Manager or the COR notifies OET (nos.coops.oetteam@noaa.gov) by email with the name of the contracting company that won the contract. This email also includes the contractor's contact information such as email, phone number, and address, and the observing network in which the contractor is authorized to work (PORTS, HYDRO, COASTAL, etc.). Upon receipt of this email from the Task Manager, OET checks whether the contractor information is populated in the DMS. If the contractor organization information is not in DMS, OET adds the information to DMS in the Vendor Information window via the DPAS PowerBuilder application.

The potential user is required to go through the CO-OPS AAM tool to apply for an account. The tool prompts the user to provide account information so OET can configure the applicants account. OET will receive the application in an email and verify the applicant's information by contacting the COR or by contacting ISD (for CO-OPS employees only) to verify the request is valid.
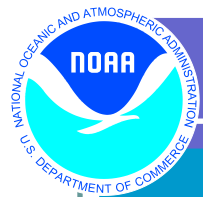
6. Detailed Sub-Processes/Checklists

A. User Account Information

<u>CO-OPS Employee</u>
The employee sends an email to OET requesting access to eSite. OET ensures that employees' information has been entered in the Personnel Information screen in DPAS PowerBuilder or requests that it be created by ISD.

<u>Contractor (IDIQ, OCS, or NGS)</u>

The contractor provides the following information to the CO-OPS Task Manager about its users who should be able to view or build and submit an eSite Report. The Task Manager forwards this information to OET within 2 business days of receiving the list of contractor user names and authority level. This information is required for OET to verify that application requests are valid and should be activated.

- Name of the contractor's organization
- First and last names of the potential eSite Report users
- Authority level of those eSite users:
  - **Visitor** is for those who can just view the report and can't make changes to the report.
  - **Submit** is for users who can review the eSite report, make changes to the report, and submit the report.
- Company email address of each of the eSite users.

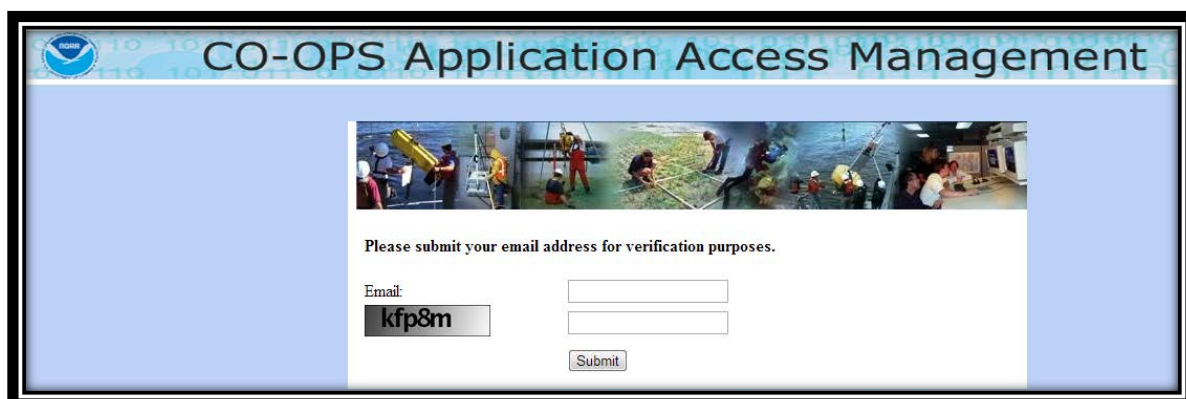B. OET creates a new organization user account (if contracting company is new).

Start DPAS PB and navigate towards the Logistics Control screen in DPAS PB. Select Equipment and click on Vendor Information (see Figure 1). If the contractor company name is not in the drop down list of contractors, click Add New and enter the relevant information.
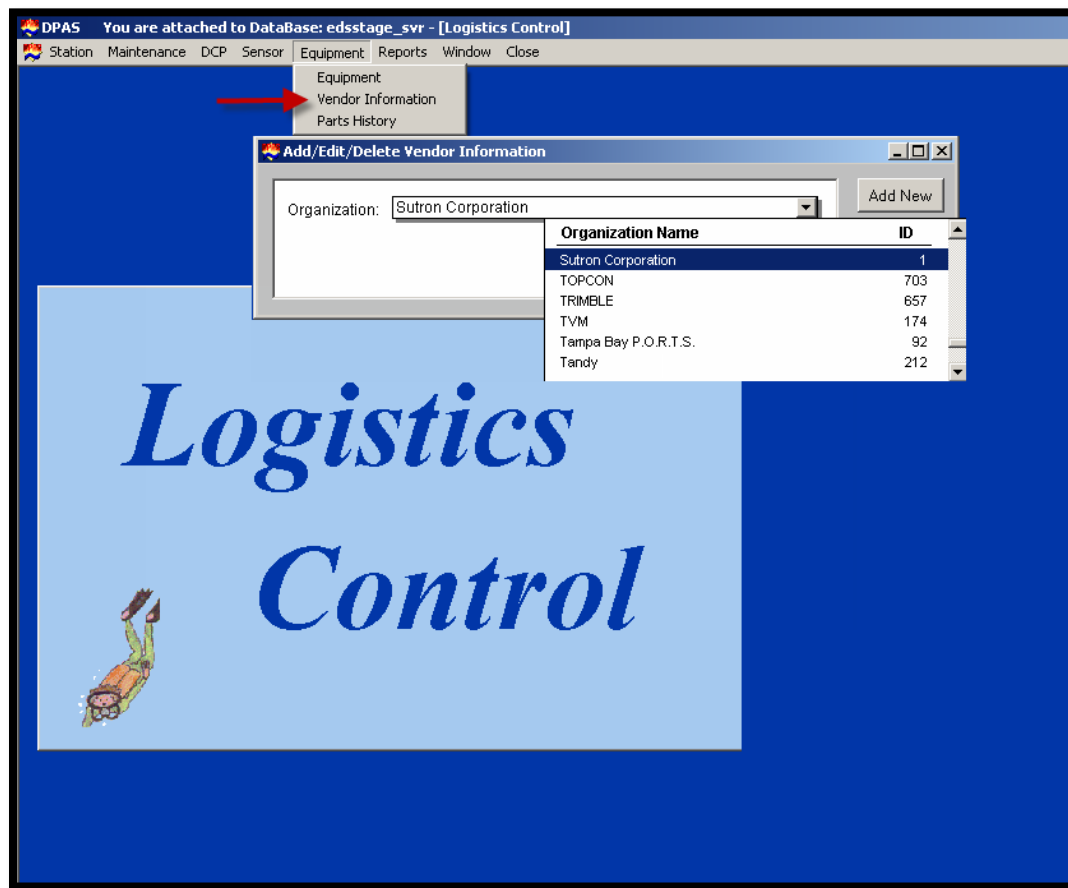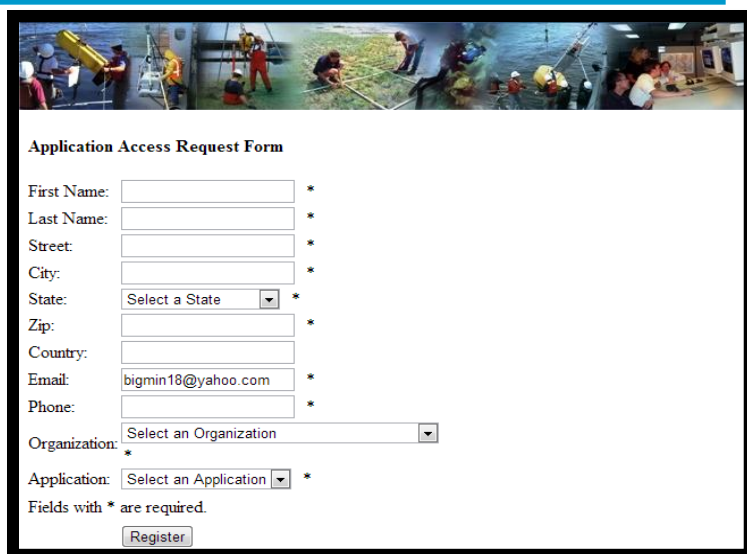

Figure 1: DPAS PB Vendor Information

C. User requests access to eSite.

In order to gain access to eSite, a potential user must navigate to the AAM tool and request for an account. OET provides the web link to the tool in an email to the potential user. The user navigates to the login page of eSite and clicks on the Account Help link. Click on Apply and provide an email address when prompted. Non CO-OPS employees should not provide personal email address. If user submits personal email accounts that do not contain the contracting company's email root name, OET shall reject the request for eSite access. By verifying user credentials, OET can be certain proper permissions are assigned to contractors.

Figure 2: CAPTCHA process

As shown in Figure 2 the potential user is prompted to complete the CAPTCHA process (**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part). When the CAPTCHA is correctly completed, the user will receive an email with a verification code. The external user must enter the verification code correctly to proceed to the Application Access Request Form. If the code is entered incorrectly, the AAM tool will redirect the user to the start of the Application Access Request Form.

Figure 3: Application Access Request Form

Next, the potential user is prompted to input the following information in the Application Access Request Form (see Figure 3): First Name, Last Name, Street, City, State, Zip, Country, Email, Phone, Organization, and Application (choose eSite). Once completed, the AAM tool directs the user to the AAM log in page. After OET has reviewed the registration form (see Step D below), OET will either reject or approve the form. If the report is rejected, the external user will get a rejection email. If the registration form is approved, OET will grant access to the application, at which point the external user will receive an email with a link to the AAM to set a password. Once the user clicks on the link, the user is directed to the Account Activation page. Go through the password verification process by completing another CAPTCHA. When complete, click Submit.

Figure 4: Account Activation

D. OET approves account request.

Upon the completion of the application request process, OET is notified by email to review the user submitted application. OET logs into the AAM and selects pending accounts under "User Account Status" (Figure 5). The name of the applicant who submitted the request will appear with information regarding the applicant. OET shall review the information displayed in the AAM before approving or rejecting the application. If the application request came from CO-OPS IDIQ contractors, OET shall verify that the applicant is an approved member of a contracting company by referring to the Task Manager's email mentioned above. If the user is a CO-OPS employee, OET shall enter the user in DPAS PB and work with ISD to assign the user a Sybase ID.


Figure 5: User Account Status - Pending Accounts

Once the user information is verified, OET assigns the user access level. For contractors, access levels are granted for eSite Visitor or Submit only. OET shall not grant Advance and or Approve access levels to contractors. For CO-OPS employees, users are potentially assigned any of the listed access levels based on credentials presented to OET. OET grants access levels following the guidelines listed below. Once OET approves the application request, the user receives an email stating the application status. If for any reason the application was rejected, the user should email the Task Manager or the COR.

Visitor: CO-OPS employees that don't update metadata in the database can access eSite reports to extract preliminary metadata. Most CO-OPS employees fit under this category with the exception of EDB and FOD. **Submit:** Contractors and field crew personal identified by the Task Manager, COR or FOD management as eSite report submitters.
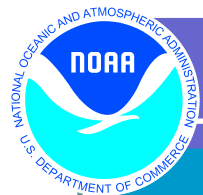
eSite Advance: Task Managers and field crew personnel identified by FOD management as eSite report Advancers.
eSite Approve: OET members only.

7.   **Quality Assurance/Control**

If the user forgets or loses their user name and/or password, they must go through the "Forget your password?" page and reset the username and/or password. In the event that the user no longer works for CO-OPS or the contracting company, OET will delete the user's account from AAM tool.

8.   **Management/Responsibility**

Responsibilities for updating this SOP reside with OET.