

Topic 2: System Administration

Topic Overview:

The purpose of this topic is to:

- Demonstrate how to perform different system administration tasks that are the responsibility of the Coordinator.

Walkthroughs:

Each of the following walkthroughs will demonstrate how to perform Coordinator system administration tasks within the Secure Systems.

- Walkthrough 5: Retrieve User Secure Systems ID
- Walkthrough 6: Assign a System Role to the Standard User
- Walkthrough 7: Assign Participant to a Standard User
- Walkthrough 8: View / Unassign a Participant to a Standard User
- Walkthrough 9: Add Business Partner Relationship
- Walkthrough 10: Activate Business Partner Relationship
- Walkthrough 11: Assign PHAs to Users
- Walkthrough 12: Unassign User's PHA Assignment
- Walkthrough 13: Change Password

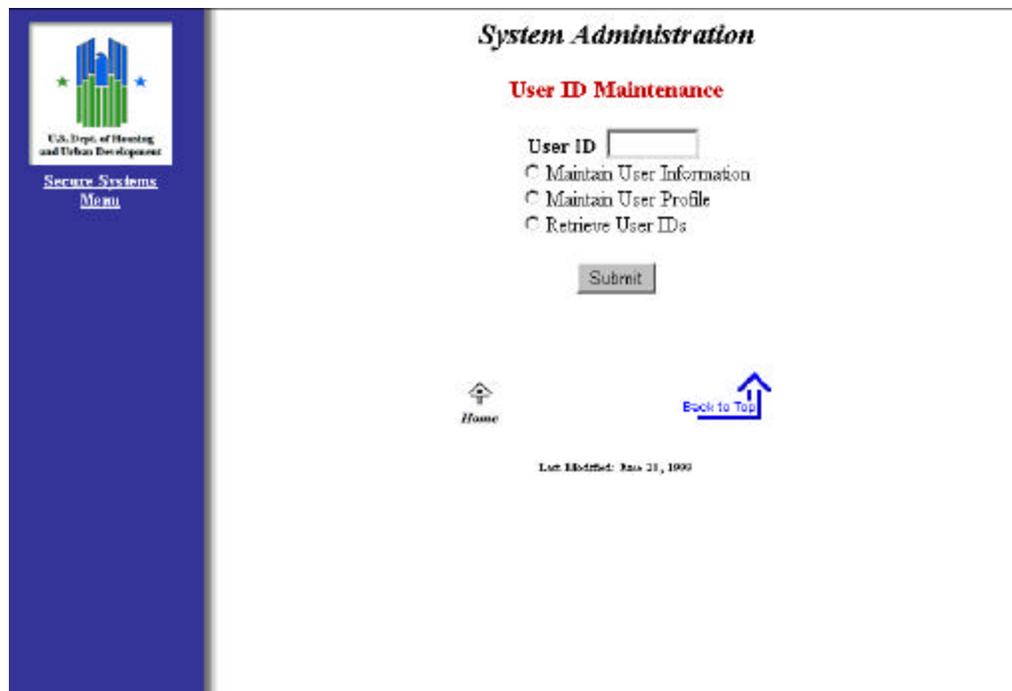
Walkthrough 5: Retrieve User Secure Systems ID

Introduction

Once a Standard User has registered with HUD and notified the Coordinator of their registration, the Coordinator must retrieve the Secure Systems ID and provide it to the Standard User. This walkthrough demonstrates how the Coordinator retrieves a User's Secure Systems ID.

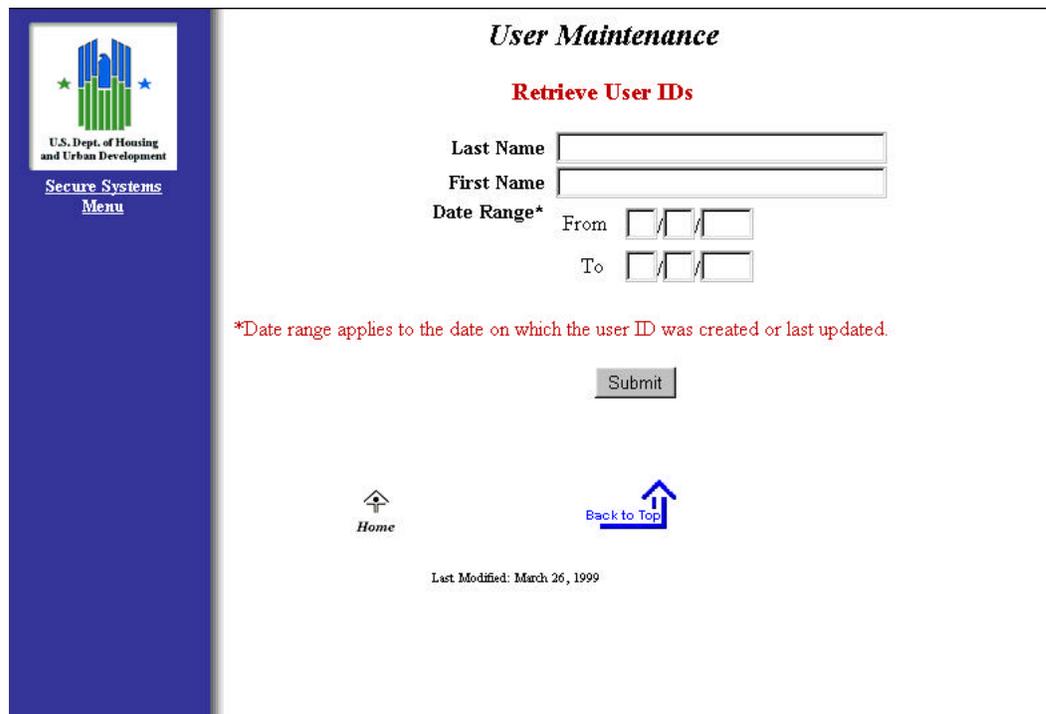
Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **User ID Maintenance** link.
The *User ID Maintenance* page opens.



Step 3: Single click the button  next to **Retrieve User IDs**.

Step 4: Single click the **Submit** button.
The *User Maintenance Retrieve User IDs* page opens.



User Maintenance

Retrieve User IDs

Last Name

First Name

Date Range* From / /

To / /

*Date range applies to the date on which the user ID was created or last updated.

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Last Modified: March 26, 1999

Step 5: Enter the appropriate Standard User information in the **Last Name** and **First Name** fields to retrieve an individual Standard User's Secure Systems ID.

NOTE: THE COORDINATOR MAY OPT TO ENTER A DATE RANGE INSTEAD OF A USER NAME. DATE FIELD ENTRIES ARE USEFUL FOR RETRIEVING SEVERAL SECURE SYSTEMS IDs AT ONCE. USE THE 2-DIGIT MONTH, 2-DIGIT DAY, 4-DIGIT YEAR FORMAT FOR DATE RANGE ENTRIES.

Step 6: Single click the **Submit** button.

The *User List* for the business partner opens. The User List includes the business partner's Tax ID and the last name, first name, User ID and status of the Standard Users for that business partner.

User List

Tax ID	Last Name	First Name	User ID	Stat
undefined	COLLINS	FRANCIS	M37968	A
undefined	KAIMER	FRANK	M37954	A
undefined	MCMILLAN	JIM	M37978	A

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Step 7: The Coordinator should note the User's Secure Systems ID to provide it to the Standard User after completing Standard User set-up tasks.

NOTE: THE COORDINATOR SHOULD PROVIDE THE STANDARD USER WITH THEIR SYSTEM ID AFTER THEY HAVE ASSIGNED THE NECESSARY RIGHTS. THE COORDINATOR MUST RETRIEVE THE STANDARD USER'S ID AND ASSIGN ANY NECESSARY RIGHTS BEFORE PROVIDING THE STANDARD USER WITH THEIR ID.

Step 8: Single click the **Main Menu** link to return to the *Secure Systems* page.

Walkthrough 6: Assign a System Role to the Standard User

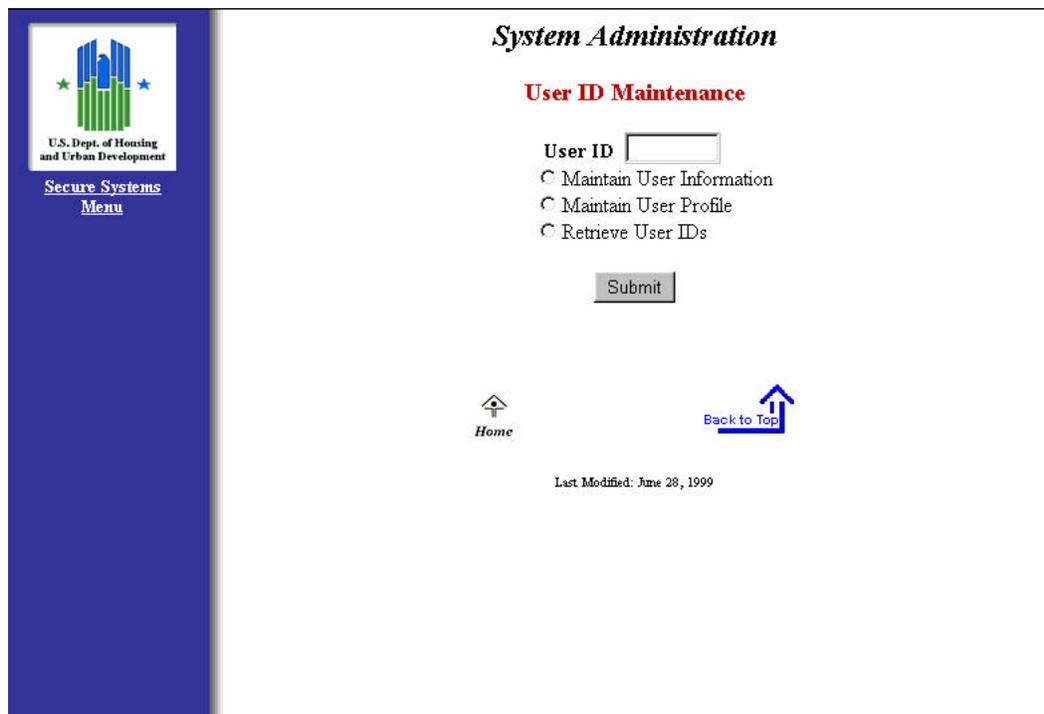
Introduction

In order to access the system, a Standard User must be assigned a system specific role allowing them to electronically access information. This walkthrough demonstrates how the Coordinator assigns system specific roles to the Standard User.

Process Steps

Step 1: Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.

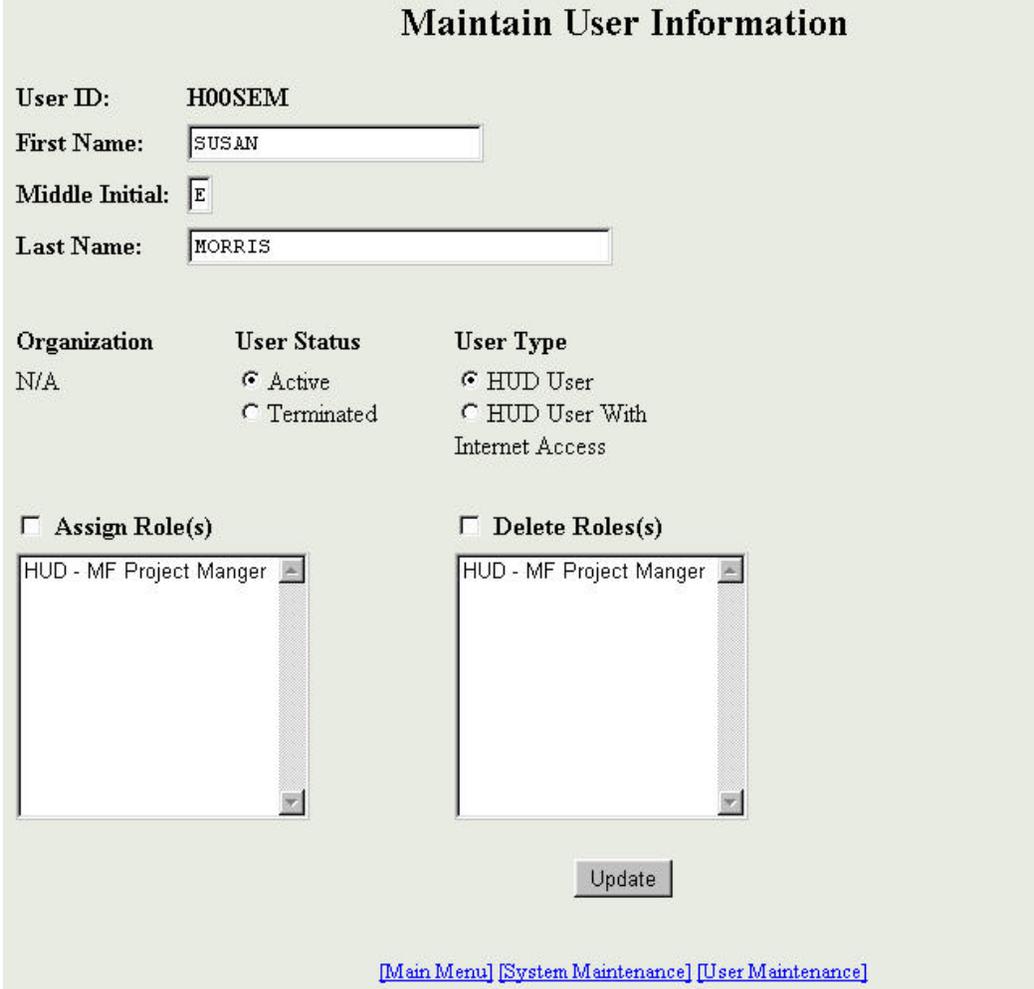
Step 2: Single click the **User ID Maintenance** link.
The *User ID Maintenance* page opens.



Step 3: Enter the User's Secure Systems ID in the **User ID** field.

Step 4: Single click the button  next to **Maintain User Information**.

Step 5: Single click the **Submit** button.
The *Maintain User Information* page opens.



Maintain User Information

User ID: H00SEM

First Name:

Middle Initial:

Last Name:

Organization	User Status	User Type
N/A	<input checked="" type="radio"/> Active <input type="radio"/> Terminated	<input checked="" type="radio"/> HUD User <input type="radio"/> HUD User With Internet Access

Assign Role(s)

HUD - MF Project Manger

Delete Roles(s)

HUD - MF Project Manger

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The *Maintain User Information* page displays the following Standard User information:

- Secure Systems ID
- First Name, Middle Initial, and Last Name
- Organization ID and Tax Identification Number (TIN)
- User Status
- User Type
- User Role(s) which may be assigned
- User Role(s) which may be deleted

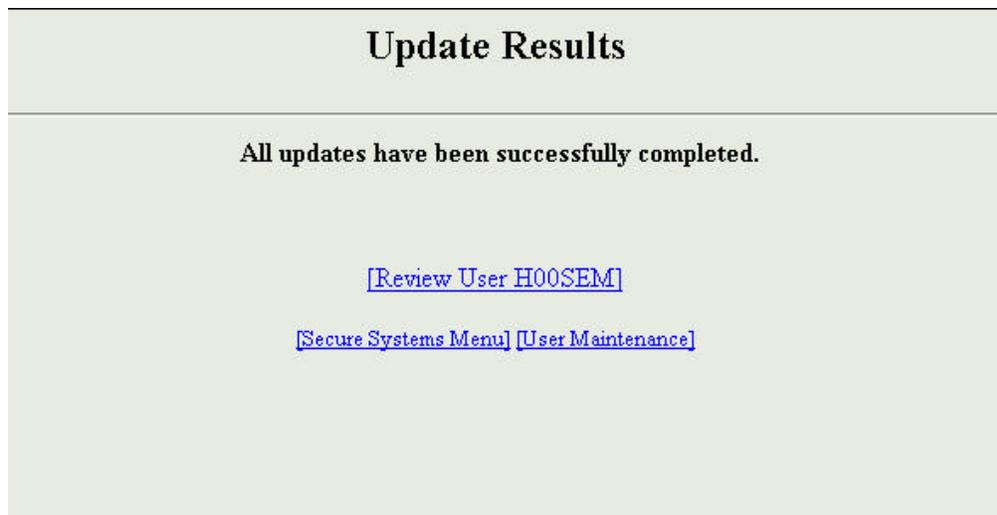
NOTE: ROLES DISPLAY BASED ON THE SYSTEM(S) IDENTIFIED IN THE COORDINATOR'S PROFILE

Step 6: Single click the checkbox next to **Assign Role(s)**.

Step 7: Single click on the appropriate role located in the **Assign Role(s)** scroll box to highlight the role.

Step 8: Single click the **Update** button.

The *Update Results* page opens. This confirms that the role assignment was successful.



Step 9: If applicable, single click on the **Review User** link.

The *Maintain User Information* page re-opens. The Standard User's assigned role is displayed in the **Delete Role(s)** scroll box.

NOTE: TO DELETE A STANDARD USER'S ROLE, SINGLE CLICK THE CHECK BOX NEXT TO DELETE ROLE(S) AND SELECT THE APPROPRIATE ROLE FOR DELETION. SINGLE CLICK THE UPDATE BUTTON TO DELETE IT.

Step 10: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

Walkthrough 7: Assign Participant to the Standard User

Introduction

The Coordinator must also assign participants to the Standard User. Participants are entities that wish to conduct business with HUD, such as property owners, management agents, and their affiliates. This walkthrough demonstrates how the Coordinator makes participant assignments to the Standard User.

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **Participant Assignment Maintenance** link.
The *Participant Assignment Maintenance* page opens.

System Administration

Participant Assignment Maintenance

User

Assign Participant View or Unassign Participant

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Step 3: Enter the User's Secure Systems ID in the **User** field.

Step 4: Single click the button  next to **Assign Participant**.

Step 5: Single click the **View Selection** button.
The *Assign Participant For User* page opens.

Assign Participant For User H00SEM

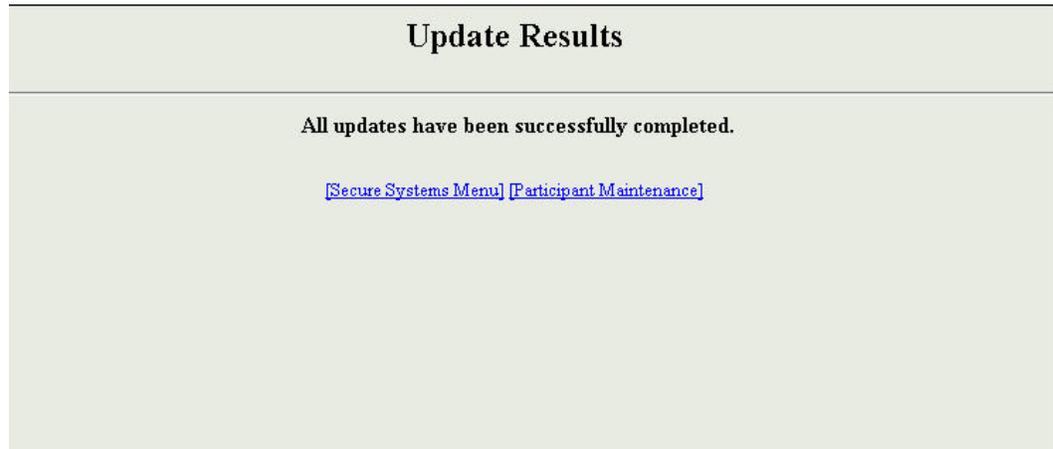
Roles	Participants
MF Project Manger (FPM) ▾	9017 KENT VILLAGE HOUSING FOR THE ELDERLY, INC
	27519 KENT VILLAGE ASSOC
	27624 KENT VILLAGE ASSOC
	28548 KENT VILLAGE PRTNS
	28554 KENT VILLAGE PRTNS
	28556 KENT VILLAGE PRTNS
	28558 KENT VILLAGE PRTNS
	40738 KENT VILLAGE INC
	40739 KENT VILLAGE INC
	40740 KENT VILLAGE INC

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Step 6: Select the appropriate participant to assign to the Standard User from the **Participants** list.

NOTE: THE COORDINATOR CAN SELECT MULTIPLE PARTICIPANTS BY PRESSING AND HOLDING THE CONTROL KEY WHILE CLICKING ON EACH APPROPRIATE PARTICIPANT.

Step 7: Single click the **Update** button.
The *Update Results* page opens.



Step 8: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

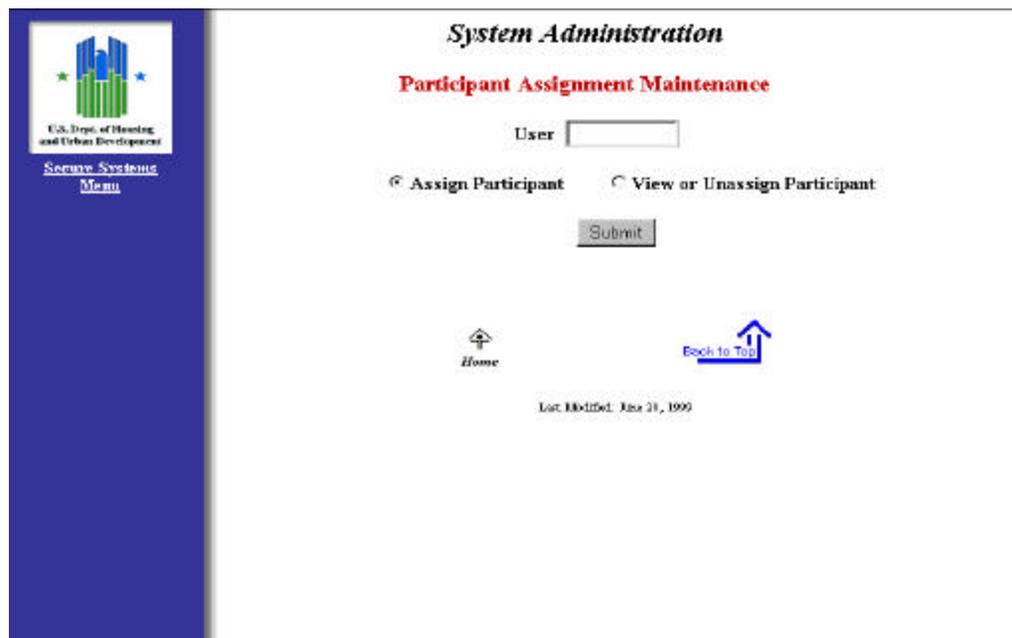
Walkthrough 8: View / Unassign Participant to the Standard User

Introduction

This walkthrough demonstrates how the Coordinator views and unassigns a participant to the Standard User.

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **Participant Assignment Maintenance** link.
The *Property Assignment Maintenance* page opens.



- Step 3:** Enter the User's Secure Systems ID in the **User** field.

- Step 4:** Single click the button  next to **View or Unassign Participant**.

Step 5: Single click the **View Selection** button.

The *Unassign Participant* page opens. This page displays the participant (or participants) assigned to the Standard User.

Participant Name	TIN/SSN	Participant Type	Role Code
<input type="checkbox"/> KEITH PROPERTIES INC	042594166	<input type="radio"/>	RRC

[\[Main Menu\]](#) [\[System Maintenance\]](#) [\[User Maintenance\]](#) [\[Participant Maintenance\]](#)

Step 6: Single click on the checkbox of the participant to be removed from the Standard User's assignment.

Step 7: Single click the **Submit** button.

The *Update Results* page opens.

Update Results

1 unassign has successfully completed

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Step 8: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

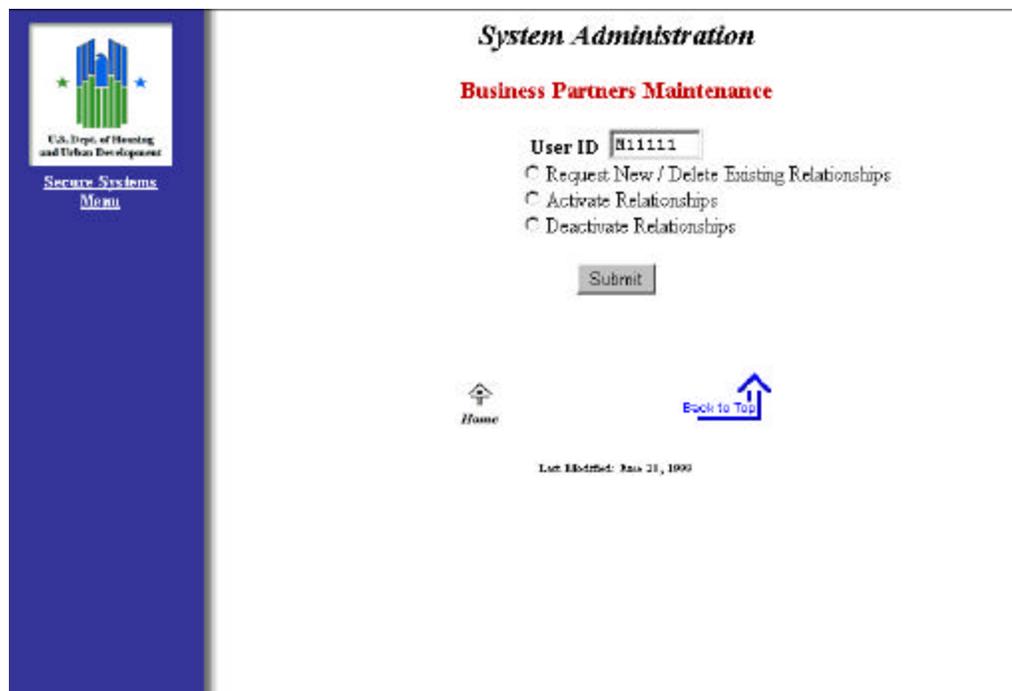
Walkthrough 9: Add Business Partner Relationship

Introduction

Coordinators may be responsible for more than one business partner. A Coordinator is established for the primary business partner using the steps outlined in Walkthrough 3: Establish Coordinator in the System. For subsequent business partners, the Coordinator must use the Business Partner Maintenance option. This walkthrough demonstrates how the Coordinator requests relationships with additional business partners.

Process Steps

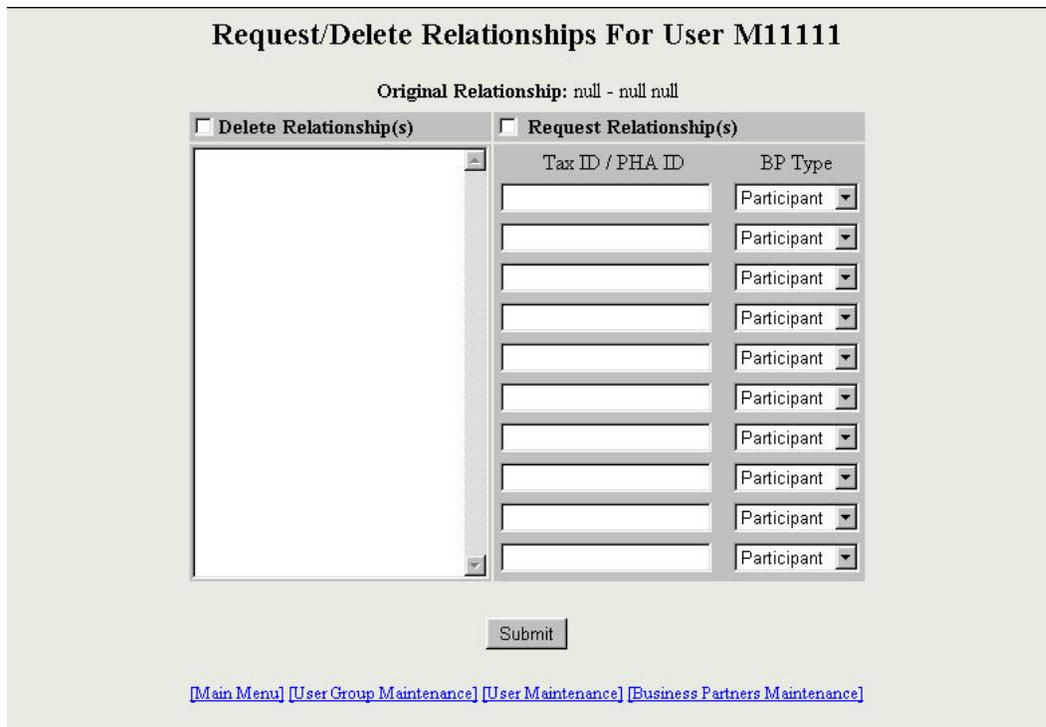
- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **Business Partners Maintenance** link.
The *Business Partners Maintenance* page opens.



Step 3: Enter the Coordinator's Secure Systems ID in the **User ID** field.

Step 4: Single click the button  next to **Request New / Delete Existing Relationships**.

Step 5: Single click the **Submit** button.
The **Request New / Delete Existing Relationships** page opens.



Request/Delete Relationships For User M1111

Original Relationship: null - null null

<input type="checkbox"/> Delete Relationship(s)	<input type="checkbox"/> Request Relationship(s)																										
	<table border="1"><thead><tr><th>Tax ID / PHA ID</th><th>BP Type</th></tr></thead><tbody><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr><tr><td></td><td>Participant</td></tr></tbody></table>	Tax ID / PHA ID	BP Type		Participant																						
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[\[Main Menu\]](#) [\[User Group Maintenance\]](#) [\[User Maintenance\]](#) [\[Business Partners Maintenance\]](#)

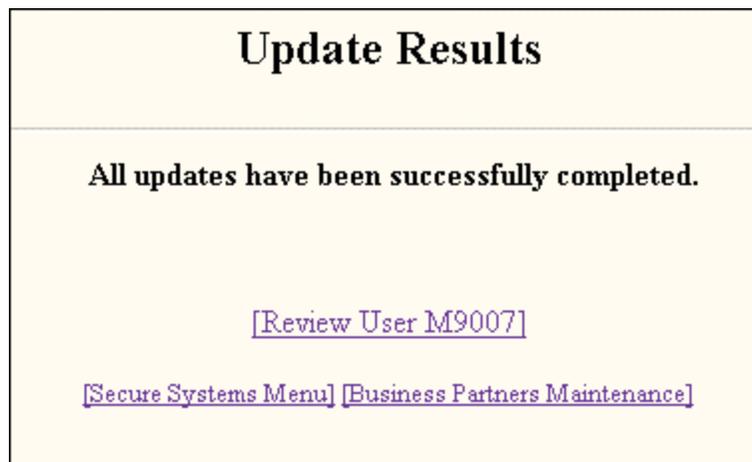
Step 6: Single click the checkbox next to **Request Relationship(s)**.

Step 7: Place the cursor in the first text field and enter the business partner's Tax Identification Number (TIN).

NOTE: TO ADD MULTIPLE BUSINESS PARTNERS, ENTER THE CORRESPONDING TINs IN THE SUBSEQUENT TEXT FIELDS.

Step 8: Select the appropriate business partner from the drop down menu.

Step 9: Single click the **Submit** button.
The *Update Results* page opens.



Step 10: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

NOTE: TO DELETE A BUSINESS PARTNER RELATIONSHIP, SINGLE CLICK THE CHECK BOX NEXT TO DELETE RELATIONSHIP(S) AND SELECT THE APPROPRIATE BUSINESS PARTNER FOR DELETION. SINGLE CLICK THE SUBMIT BUTTON TO DELETE IT.

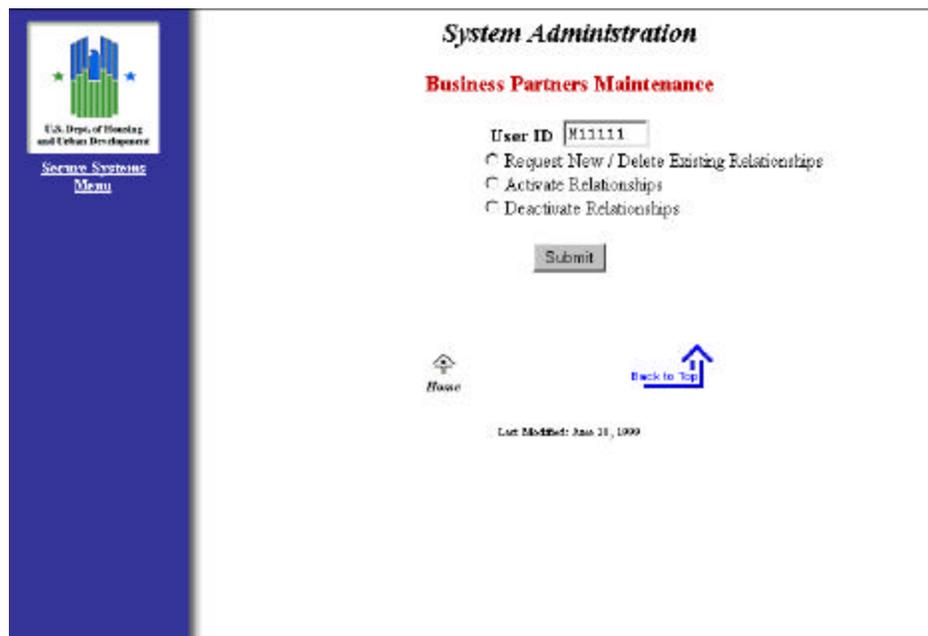
Walkthrough 10: Activate Business Partner Relationship

Introduction

Once the Coordinator submits the request for an additional business partner relationship, the system generates an activation key. The activation key consists of numbers and uppercase letters. HUD sends a letter to the CEO or Executive Director of the business partner which contains the activation key for the Coordinator. The Coordinator receives the activation key from the CEO or Executive Director of the business partner and is then able to activate the new relationship in the system. This walkthrough demonstrates how the Coordinator establishes relationships with additional business partners.

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **Business Partners Maintenance** link.
The *Business Partners Maintenance* page opens.



Step 3: Enter the Coordinator's Secure Systems ID in the **User ID** field.

Step 4: Single click the button  next to **Activate Relationships**.

Step 5: Single click the **Submit** button.
The *Activate Relationships* page opens.



Activate / Deactivate Relationships For User M04000

<input type="checkbox"/> Deactivate Relationship(s)	<input type="checkbox"/> Activate Relationship(s)
030314095 - REAL-NET MANAGEMENT, INC. 730952619 - BETHANY PLACE INC.	030314122 - TOM WHITTAKER REAL ESTATE 030317189 - LAKE CHAMPLAIN HOUSING VE 030323771 - TECHNICAL PLANNING & MANA

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Step 6: Single click the checkbox next to **Activate Relationship(s)**.

Step 7: Single click the appropriate business partner from the **Activate Relationship(s)** scroll box to highlight the business partner.

Step 8: Single click the **Submit** button.
The *Update Results* page opens.



Step 9: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

NOTE: TO DEACTIVATE A BUSINESS PARTNER RELATIONSHIP, SINGLE CLICK THE CHECK BOX NEXT TO DEACTIVATE RELATIONSHIP(S) AND SELECT THE APPROPRIATE BUSINESS PARTNER FOR DELETION. SINGLE CLICK THE SUBMIT BUTTON TO DEACTIVATE IT.

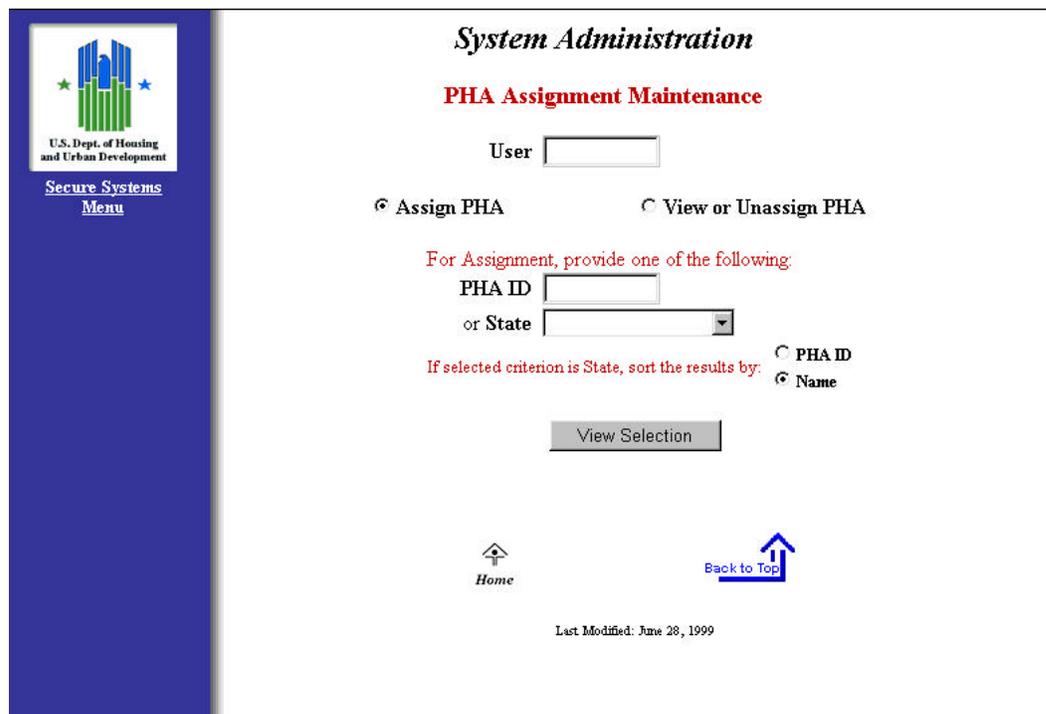
Walkthrough 11: Assign PHAs to Users

Introduction

This walkthrough demonstrates how the Coordinator assigns PHAs to the User.

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **PHA Assignment Maintenance** link.
The *PHA Assignment Maintenance* page opens.



The screenshot shows a web interface for 'System Administration' with a sub-section for 'PHA Assignment Maintenance'. On the left is a blue sidebar with the U.S. Department of Housing and Urban Development logo and a 'Secure Systems Menu' link. The main content area has a title 'System Administration' and a sub-title 'PHA Assignment Maintenance'. Below the sub-title is a 'User' text input field. There are two radio buttons: 'Assign PHA' (which is selected) and 'View or Unassign PHA'. A red instruction reads 'For Assignment, provide one of the following:'. Below this are two input fields: 'PHA ID' and 'or State' (a dropdown menu). Another red instruction reads 'If selected criterion is State, sort the results by:'. Below this are two radio buttons: 'PHA ID' and 'Name' (which is selected). A 'View Selection' button is positioned below the sorting options. At the bottom of the page, there are 'Home' and 'Back to Top' links, and a footer note 'Last Modified: June 28, 1999'.

- Step 3:** Enter the User's Secure Systems ID in the **User** field.

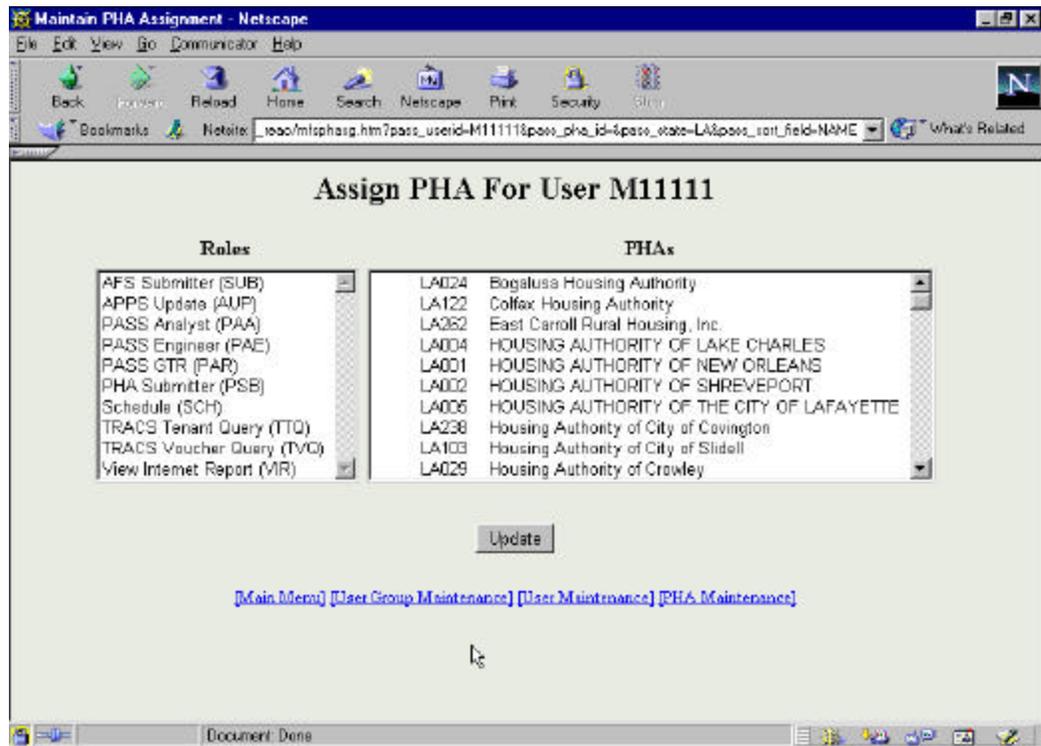
- Step 4:** Single click the button  next to **Assign PHA**.

Step 5: Enter the PHA ID in the **PHA ID** field.

If the PHA ID is unknown, the **State** drop-down menu may be used to select the state where the PHA is located.

Step 6: Single click the button  next to appropriate sort method, **PHA ID** or **Name**.

Step 7: Single click the **View Selection** button.
The *Assign PHA For User* page opens.



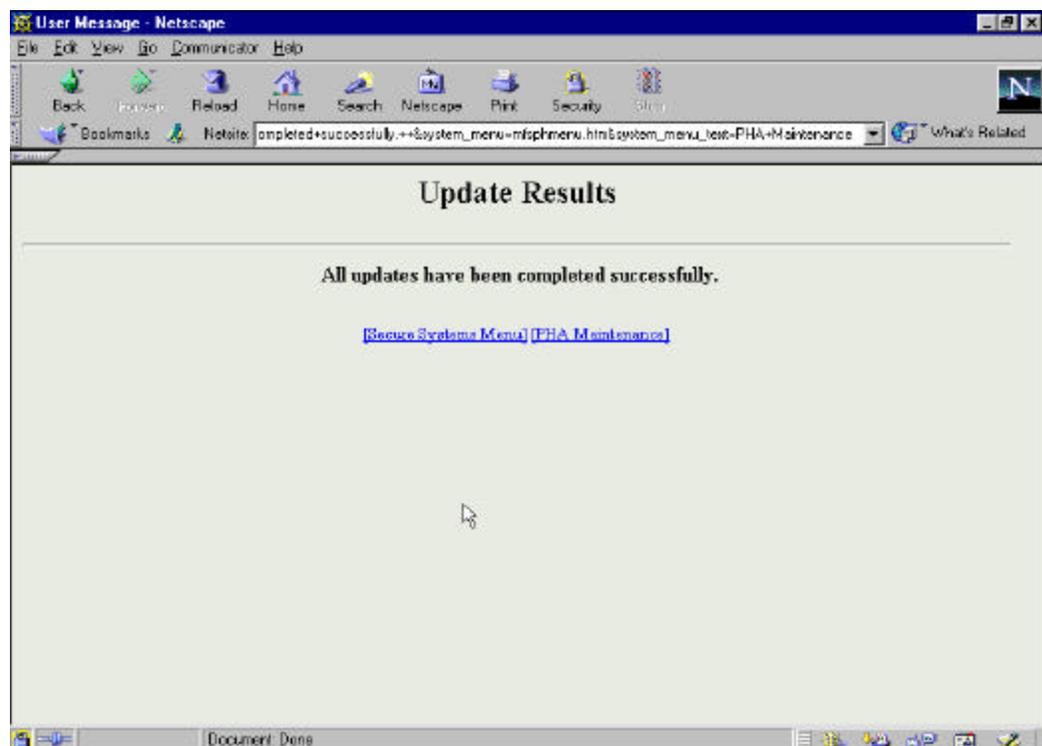
Step 8: Single click the appropriate role(s) from the **Roles** scroll box to highlight the role(s).

NOTE: THE COORDINATOR CAN SELECT MULTIPLE ROLES BY PRESSING AND HOLDING THE CONTROL KEY WHILE CLICKING ON EACH APPROPRIATE ROLE.

Step 9: Single click the appropriate PHAs from the **PHAs** scroll box to highlight the PHAs.

NOTE: THE COORDINATOR CAN SELECT MULTIPLE PHAs BY PRESSING AND HOLDING THE CONTROL KEY WHILE CLICKING ON EACH APPROPRIATE PHAs.

Step 10: Single click the **Update** button.
The *Update Results* page opens.



Step 11: Single click the **Secure Systems Menu** link to return to the *Secure*

Systems page.

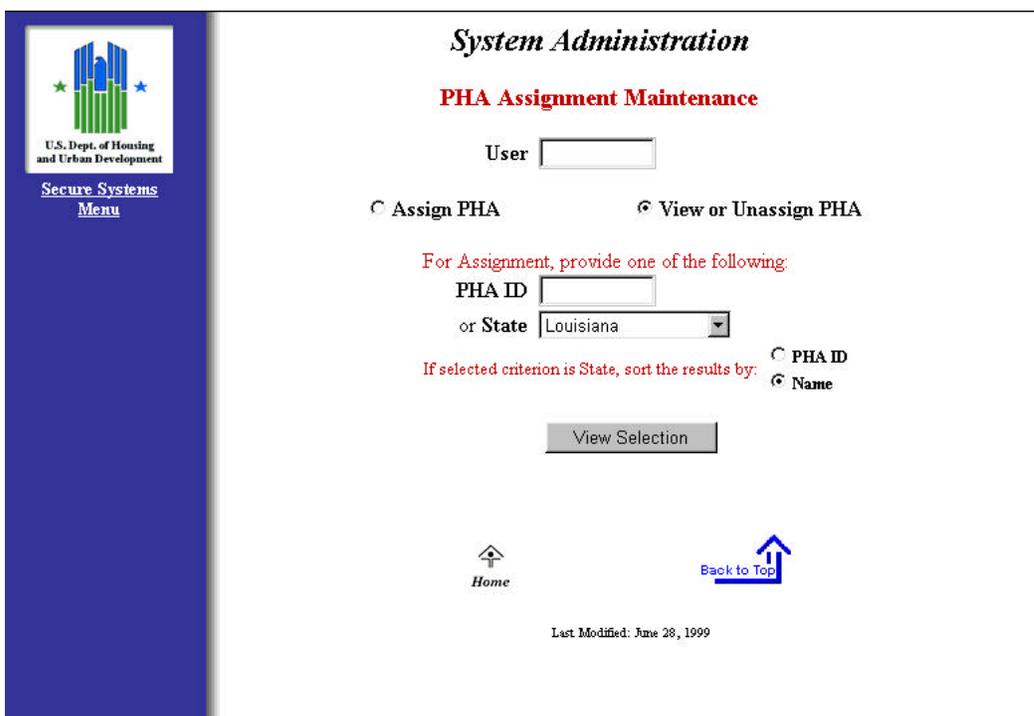
Walkthrough 12: Delete User's PHA Assignment

Introduction

This walkthrough demonstrates how the Coordinator deletes a User's PHA assignment(s).

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **PHA Assignment Maintenance** link.
The *PHA Assignment Maintenance* page opens.



The screenshot shows the 'System Administration' page with the 'PHA Assignment Maintenance' section. On the left is a blue sidebar with the U.S. Dept. of Housing and Urban Development logo and 'Secure Systems Menu'. The main content area has a title 'System Administration' and 'PHA Assignment Maintenance' in red. Below the title is a 'User' text input field. There are two radio buttons: 'Assign PHA' (unselected) and 'View or Unassign PHA' (selected). A red instruction says 'For Assignment, provide one of the following:'. Below this are 'PHA ID' and 'or State' (with a dropdown menu showing 'Louisiana'). Another red instruction says 'If selected criterion is State, sort the results by:'. There are two radio buttons: 'PHA ID' (unselected) and 'Name' (selected). A 'View Selection' button is below. At the bottom are 'Home' and 'Back to Top' links, and a footer 'Last Modified: June 28, 1999'.

- Step 3:** Enter the User's Secure Systems ID in the **User** field.

- Step 4:** Single click the button  next to **View or Unassign PHA**.

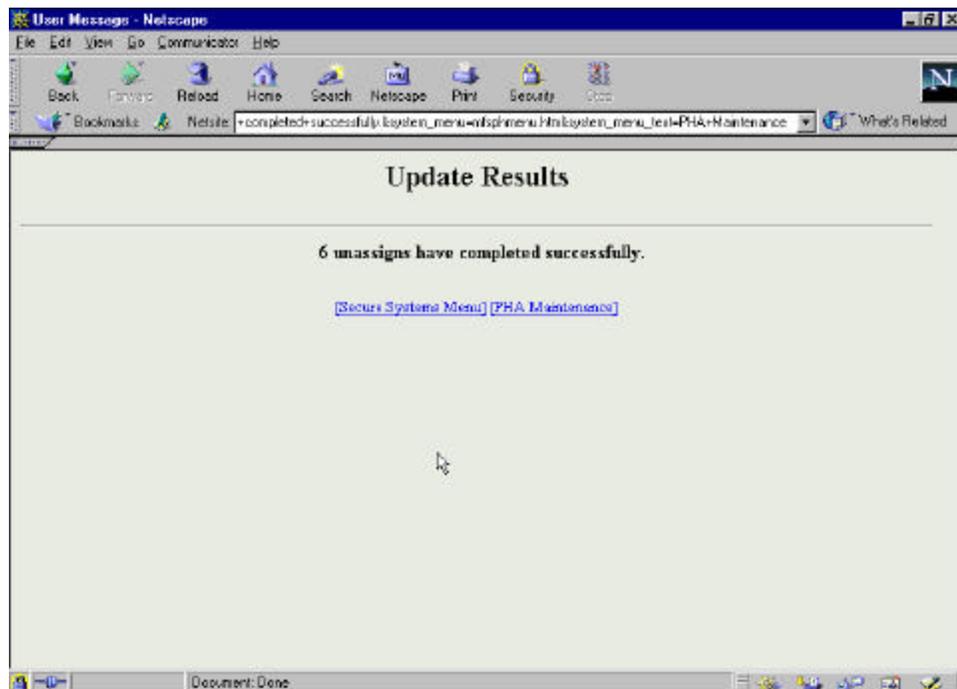
- Step 5:** Enter the PHA ID in the **PHA ID** field.
If the PHA ID is unknown, the **State** drop-down menu may be used to select the state where the PHA is located.
- Step 6:** Single click the button  next to appropriate sort method, **PHA ID** or **Name**.
- Step 7:** Single click the **View Selection** button.
The *Unassign PHA For User* page opens.

Unassign PHA For User M1111

PHA ID	PHA Name	Role Code
<input type="checkbox"/> FL081	HOUSING AUTHORITY OF THE CITY OF DEERFIELD BEACH	PSB
<input checked="" type="checkbox"/> LA024	Bogalusa Housing Authority	PSB
<input checked="" type="checkbox"/> LA029	Housing Authority of Crowley	PSB
<input checked="" type="checkbox"/> LA103	Housing Authority of City of Slidell	PSB
<input checked="" type="checkbox"/> LA122	Colfax Housing Authority	PSB
<input checked="" type="checkbox"/> LA238	Housing Authority of City of Covington	PSB
<input checked="" type="checkbox"/> LA262	East Carroll Rural Housing, Inc.	PSB
<input type="checkbox"/> ME027	Ellsworth Housing Authority	PSB

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- Step 8:** Single click the checkbox next to the PHA ID in the **PHA ID** column to select the PHA to unassign.
- Step 9:** Single click the **Submit** button.
The *Update Results* page opens.



Step 10: Single click the **Secure Systems Menu** link to return to the *Secure Systems* page.

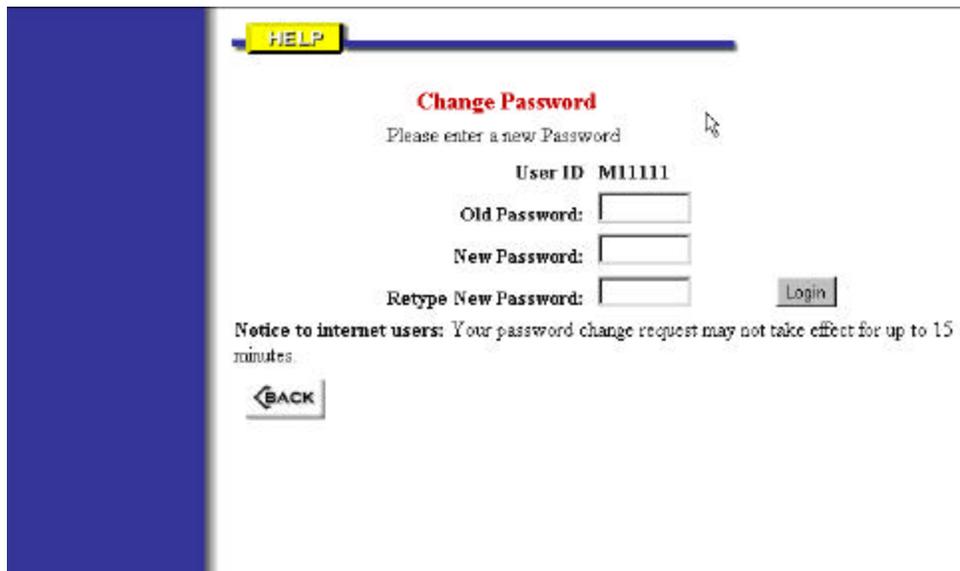
Walkthrough 13: Change Password

Introduction

This walkthrough demonstrates how the Coordinator changes their own password.

Process Steps

- Step 1:** Log in to the Secure Systems.
See **Walkthrough 2: Log in to the Secure Systems** for more information.
- Step 2:** Single click the **Password Change** link.
The *Change Password* page opens.



HELP

Change Password

Please enter a new Password

User ID M11111

Old Password:

New Password:

Retype New Password: Login

Notice to internet users: Your password change request may not take effect for up to 15 minutes.

BACK

- Step 3:** Enter the old password in the **Old Password** field.
- Step 4:** Enter the new password in the **New Password** field.
This password is case-sensitive and must be 6 characters (letters and/or numbers).

Step 5: Re-enter the new password in the **Retype New Password** field.

Step 6: Single click the **Login** button.

The old password is changed to the new password and the *Secure Systems* page re-opens.

NOTE: PASSWORD CHANGES ARE NOT INSTANTANEOUS. IT MAY TAKE UP TO 15 MINUTES TO PROCESS THE CHANGE ON THE INTERNET SERVER.