CNA eTool
Internal User Manual

U.S. Department of Housing and Urban Development

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## Contents

U.S. Department of Housing and Urban Development .................................................................................................. 1

Contents ...................................................................................................................................................................... 2

1. Introduction ..................................................................................................................................................... 1
   1.1 System Requirements .............................................................................................................................. 1
   1.2 System Overview ..................................................................................................................................... 1

2. Business Process Overview .............................................................................................................................. 1

3. Accessing the CNA eTool .................................................................................................................................. 2
   3.1 Logging into the eTool ............................................................................................................................. 2
   3.2 Logging out of the eTool .......................................................................................................................... 4

4. Locate CNA ...................................................................................................................................................... 5
   4.1 My CNAs .................................................................................................................................................. 5
   4.1.1 Search for Existing CNA ......................................................................................................................... 5
   4.2 Assigning a CNA for Review .................................................................................................................... 7
      4.2.1 Assigning a CNA by an “Assigner” ..................................................................................................... 7
      4.2.2 Assigning CNA by a currently assigned reviewer ........................................................................... 11
   4.3 Reviewing a CNA .................................................................................................................................... 15
      4.3.1 Locate CNA ........................................................................................................................................... 17
      4.3.2 Summary .............................................................................................................................................. 17
      4.3.3 Flags 17
      4.3.4 Financial Factors .................................................................................................................................. 24
      4.3.5 Financial Schedule ............................................................................................................................... 24
      4.3.6 Estimate Period Recap ......................................................................................................................... 25
      4.3.7 Critical Repair Needs ........................................................................................................................... 25
      4.3.8 Non Critical Repair Needs ................................................................................................................... 26
      4.3.9 Future Repair Replacements ............................................................................................................. 27
      4.3.10 Component Schedule Summary ....................................................................................................... 27
      4.3.11 Narrative ............................................................................................................................................. 27
      4.3.11 Property Tree ..................................................................................................................................... 29
      4.3.12 Inspection Sample .............................................................................................................................. 31
      4.3.13 Attachments ....................................................................................................................................... 31
      4.3.14 Reports ............................................................................................................................................... 32
4.3.15 Agency CNA Decision ........................................................................................................................... 46
4.3.16 Undo Approval ........................................................................................................................................... 47

5. Administrative Functions .................................................................................................................................. 49
  5.1 Flag Admin ...................................................................................................................................................... 49
    5.1.1 Search Flag ............................................................................................................................................... 50
    5.1.2 Create Flag ............................................................................................................................................... 51
    5.1.3 Edit Flag .................................................................................................................................................. 54
  5.2 LOV Admin ................................................................................................................................................... 55
    5.2.1 LoV Maintenance on the Web Tool ........................................................................................................... 55
  5.3 Text Template Admin ..................................................................................................................................... 67
    5.3.1 Search Template ...................................................................................................................................... 68
    5.3.2 Edit Template ........................................................................................................................................... 69
  5.4 Component Type / EUL Admin ....................................................................................................................... 73
    5.4.1 Need Category ......................................................................................................................................... 73
    5.4.2 Need Item ................................................................................................................................................ 78
    5.4.3 Component Type ..................................................................................................................................... 83
  5.5 Reports ......................................................................................................................................................... 91
    5.5.1 Nightly Reports ...................................................................................................................................... 91
    5.5.2 Answers .................................................................................................................................................. 91
    5.5.3 Component Type Useful Life Variances .................................................................................................. 92
    5.5.4 Component Type Price Variances ............................................................................................................ 92
    5.5.5 Properties with Out-Of-Date Assessments ............................................................................................... 93
    5.5.6 Assessment Workload / Volume Metrics ................................................................................................. 93
    5.5.7 Property Assessment Review Aging ....................................................................................................... 94
    5.5.8 Property Assessment Assignment Aging ................................................................................................ 94
  5.6 Security ........................................................................................................................................................ 96
    5.6.1 Authentication (provisioning new credentials) ........................................................................................ 96
    5.6.2 Authorization (granting / revoking roles) ............................................................................................... 96

Appendix A ........................................................................................................................................................ 103
  A1: View ...................................................................................................................................................... 103
  A2: Detach ...................................................................................................................................................... 110
  A3: Sorting within a column: ............................................................................................................................ 111
  A4: Export ...................................................................................................................................................... 112
1. Introduction

The CNA eTool System is an alignment initiative that is part of a broader set of initiatives undertaken by multiple agencies, specifically, the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Agriculture (USDA), the U.S. Department of the Treasury, and Housing Finance Agencies (HFAs) that perform various types of capital needs assessments on their respective properties. The primary objective of this initiative effort is to gain alignment as to what constitutes the uniform assessment standard so that it can be leveraged by external partners as well as interested third parties who are involved in the assessment process.

Since there are many different parties involved in performing assessments, multiple delivery channels were established for submitting assessments including email, web page upload, and B2G/XML interface. The following user manual is intended for use by internal agency personnel and describes the use of the web tool.

1.1 System Requirements

The basic system requirements are as follows:

- Access to HUD network/portal or VPN into the HUD network
- Access to the internet
- Internet Explorer version 7.0 or higher, Google Chrome Version 37.0.2062.103 m, or Mozilla FireFox 31.0
- HUD ID or External ID (GID, IID, or MID) and the credentials to access the CNA eTool
- Excel 2010 or higher

1.2 System Overview

This section provides an introduction to basic terms and definitions, which are used throughout this user manual.

**Screens** are a set of panels that are organized around a certain area of functionality, such as CNA review, flag/system administration.

**Panels** provide viewing and navigation capabilities for data specific to a Capital Needs Assessment including Financial Schedules, Capital Needs Schedule, flags, etc.

2. Business Process Overview

This user manual is meant as a guide for all internal HUD/USDA users who are involved in the business processes for viewing, reviewing, and managing Capital Needs Assessments (CNA). These processes involve both internal HUD/USDA users as well as the external lender users.
3. Accessing the CNA eTool

3.1 Logging into the eTool

All internal HUD users will log into CNA Reviewer eTool via the following URL:  https://hudapps.hud.gov/ssmaster

a. The user is taken to the Secure Systems Notices page as displayed below.
b. Scroll down and click the **Accept** button.

![Message of the Day]

> The Secure Systems security access software supports Internet Explorer 7.0 browser. Other browsers may not be compatible with this software.

**Message of the Day**

**** Attention TEST Users ****

This is a Test.

We apologize for any inconvenience.

(Message ID# 85200 - Updated by JASSO on Tue Sep 03 08:53:26 EDT 2013)

![Accept button]

C. The Main Menu page is then displayed.

![Main Menu]

d. Click on **CNA eTool** to get into the CNA eTool.
3.2 Logging out of the eTool

When the user clicks the Logout button at the top right-hand corner of the screen, the user is taken back to the Secure Systems Single Sign On web page.

a. Click on the **Logout** button.

b. The user is taken to the Secure Systems Main Menu web page as displayed below.
4. Locate CNA

This section will detail how to view all Assigner / Reviewer specific screens on the CNA eTool website.

4.1 My CNAs

When logged-in as a reviewer, all assessments assigned to the logged-in reviewer will be displayed on the screen. The logged-in user ID is displayed at the top right corner of the screen.

Reviewer HCNT04, in the example above, is able to re-assign only those assessments assigned to them with a Status of Under Review or Submitted to another reviewer by clicking on the + sign next to the name in the Reviewer column. Any assessment with the status of Approved or Rejected or assigned to another reviewer cannot be re-assigned. See section 4.3.2 for detailed instructions on how to assign/re-assign an assessment for review.

4.1.1 Search for Existing CNA

a. Users can search for assessments by entering search values on either of the fields displayed on the Locate CNA screen and clicking on the Search button.
b. Enter Property Name and click on the **Search** button.

Users can type in complete search terms as shown above or portions of the text to search for assessments.

c. The screen displays all the assessments related to the search criteria on the bottom of the screen.
Users can enter any number of search criteria to refine their search. For example, by typing in “VA” in the State field, and selecting “Approved” in the Internal Status field, the user will get a list of all assessments that have a status of Approved from Virginia.

4.2 Assigning a CNA for Review

A CNA can be assigned to a reviewer either by a user with the “assigner” role or re-assigned by the currently assigned reviewer to another user with the “reviewer” role.

4.2.1 Assigning a CNA by an “Assigner”

a. As soon as an assigner logs into the tool, they are automatically presented with a list of CNAs submitted to the agency associated with them but not yet assigned.

b. To select a reviewer, click on the + sign in the Reviewer column.
When an Assigner with both assigner and a reviewer roles logs in, they will be presented with the assessments assigned to them (via their reviewer role).

Only assessments with the status of **Submitted** and **Under Review** can be assigned to a reviewer.

c. After clicking the + sign, the following dialog box is displayed

d. Click on the drop-down arrow to choose a reviewer.
e. Choose a reviewer from the list displayed. Here, **LAST – HCNT04, FIRST - HCNT04** is chosen. Click on the **OK** button.

f. On the search fields above the table, search for the assigned reviewer by clicking on the down-arrow in the **Reviewer** field and click on the **Search** button.
g. The bottom of the screen displays all the CNAs assigned to the selected reviewer.

**4.2.2 Assigning CNA by a currently assigned reviewer**

a. Log into as a reviewer; here logged in as LAST – HCNT04, FIRST - HCNT04.

**NOTE:** Please note that only those CNAs with the status of **Submitted** or **Under Review** have the + sign next to the reviewer’s name, indicating that these CNAs can be re-assigned to a different reviewer by this reviewer. Those CNAs with the status of **Approved** or **Rejected** or **Received for Validation** cannot be re-assigned to a different reviewer by this reviewer.
b. Click on the + sign in the Reviewer column and below screen is displayed. In this example, Assessment ID 2014-003057 is selected.

c. Click on the drop-down arrow to choose a reviewer.
d. Choose a reviewer from the list displayed. Here, LAST – HCNT06, FIRST - HCNT06 is chosen. Click the OK button.

e. On the search fields above the table, search for the assigned reviewer by clicking on the down-arrow in the Reviewer field and click on the Search button.
f. The below screen shows the reviewer FIRST – HCNT04, LAST - HCNT04 has re-assigned to assessment ID 2014-003057 to reviewer FIRST – HCNT06, LAST - HCNT06.
4.3 Reviewing a CNA

To review a CNA, the reviewer logs into the reviewer tool and is presented with all the assessments currently assigned to them. In this example, reviewer **FIRST – HCNT04, LAST - HCNT04** has logged in to review a Submitted CNA.

a. Click the Assessment ID link in blue to launch the assessment for review. Here, assessment ID **2014-003221** has been selected.
d. The **LOCATE CNA** screen displayed below shows various panels that contain all of the CNA information submitted to the agency.

![LOCATE CNA screen](image)

- Each of the panels can be expanded by:
  i. Clicking on the right-arrow button to the left side of the panel names
  ii. Double clicking anywhere in the panel header.
All the panels can be expanded by clicking **Expand All** button at the top right corner of the screen.

### 4.3.1 Locate CNA

The top-most panel displays the basic information of the CNA.

"**View Previous History**" displays all other CNA’s submitted for the same property with various statuses.

### 4.3.2 Summary

The **Summary** panel displays various participants associated with this assessment. For example, Current Owner, Lender, and Property Manager are displayed on the screen.

### 4.3.3 Flags

The **Flags** panel displays all the flags generated for this assessment.

a. Click the arrow on the left side of **Flags** to expand this panel.
b. The expanded panel is displayed below.

c. The reviewer has the ability to add comment to flags. To add a comment on a specific flag, click the “edit” in the Reviewer Response column.
d. Enter the comment in the **Add Reviewer Response** box.

![Screen capture of Add Reviewer Response dialog box](image)

e. The below screen capture is an example of reviewer comments added in the pop up window. Click the **OK** button to save the review comment.

![Screen capture of reviewer comments](image)

f. The user is back on the original screen with the reviewer’s comment saved and displayed.
Comments will not be visible to the submitter until a decision on the assessment has been made (i.e. Accept or Reject)

(i) Add a Flag

The reviewer has the ability to add a “manual flag” to the assessment at any time during the review.

a. Click the **Add** button on top of the **Flags** panel.

b. A pop-up box with the options to add a new flag is displayed on the screen.
c. Click the drop-down option for **Flag ID** and choose any of the manual flags that were predefined. In this case the **FN-013** flag is chosen.

In the drop-down list a user will see only those flags that have been designated by system administrators as manual flags. Users cannot create their own flags, they must choose from the predefined list (See section 5.1.2 for steps on how to create a new manual flag in the system).

d. Since this is a manual flag, the **Automated Flag** field is grayed out and has “N” implying that it is not an automated flag, the **Severity** and **Flag Cause Note** fields automatically populate based on the flag chosen.
e. The user is able to select a **Component Type** tied to the assessment from the pre-populated drop-down list and enter a Reviewer Response and click the **OK** button to save the new flag.

f. Scroll down the Flags panel to view the new flag.

(ii) **Edit a Flag**

The reviewer has the ability to edit a response of any flag.

a. With the respective row of the Flag to edit selected, click the **Edit** button on top of the **Flags** panel.
b. The screen displays the **Manage Flag** box, where the reviewer can edit the flag.

c. Update the **Reviewer Response** with a new comment and click the **OK** button.

d. The information is updated on the **Flags** panel for the flag selected.
4.3.4 Financial Factors

a. Click the arrow next to **Financial Factors** panel to view information related to the financial factors submitted

4.3.5 Financial Schedule

a. Click the arrow next to **Financial Schedule** panel to view the calculated financial schedule based on recommendations/decisions made
4.3.6 Estimate Period Recap

a. Click the arrow next to **Estimate Period Recap** panel to display a list of fields that give a financial recap of the assessment submitted.

### Financial Schedule

<table>
<thead>
<tr>
<th>Total</th>
<th>$/Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Repairs (Total)</td>
<td>$2,120</td>
</tr>
<tr>
<td>Life Safety Repairs</td>
<td>$1,186</td>
</tr>
<tr>
<td>Accessibility Remedies</td>
<td>$102</td>
</tr>
<tr>
<td>Non-critical Needs</td>
<td>$500</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total</th>
<th>$/Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Deposits [all sources] to RRR Escrow</td>
<td>$599,965</td>
</tr>
<tr>
<td>Interest Income</td>
<td>$15,216</td>
</tr>
<tr>
<td>Total Unfunded Future Needs</td>
<td>$12,752</td>
</tr>
<tr>
<td>Total Inflated Future Needs [set aside]</td>
<td>$6,336</td>
</tr>
<tr>
<td>Estimate Period Ending Balance</td>
<td>$599,229</td>
</tr>
</tbody>
</table>

4.3.7 Critical Repair Needs

a. Click the arrow next to Critical Repair Needs panel to display 2 sub-panels, **Life Safety Critical Repairs** and **Accessibility Critical Repairs**. Items displayed in these panels are recommendations/decisions that were identified as a life safety or accessibility deficiency.
b. **Life Safety Critical Repairs**: The Life Safety Indicator identifies the repair or replacement item as a critical repair intended to remedy an immediate risk to health and safety identified by the assessor.

c. **Accessibility Critical Repairs**: The Accessibility Indicator identifies a particular repair, replace or add new action as part of a corrective action plan to address identified accessibility deficiencies.

### 4.3.8 Non Critical Repair Needs

d. Click the arrow next to **Non Critical Repair Needs** panel. Items listed in this panel are recommendations/decisions that were identified as to be completed “Now” but were not identified as Life Safety or Accessibility.
4.3.9 Future Repair Replacements
   a. Click the arrow next to Future Repair Replacements panel. Items listed in this panel are recommendation/decisions that were identified as to be completed at their “End of Cycle”

4.3.10 Component Schedule Summary
   a. Click the arrow next to the Component Schedule Summary panel. This panel is a summary of all Components.

4.3.11 Narrative
a. Click the arrow next to **Narrative** panel.

![Narrative panel](image)

**NOTE:** If an assessor has input a narrative that is pertinent to the CNA, the user can view it in this panel.

a. Click on the down-arrow of the **Narrative** box.

![Narrative drop-down](image)

b. The drop-down values are displayed for those areas populated by the submitter.
c. In this example, **INTERIOR_ELEMENTS_COMMON** is selected from the list of values.

d. The narrative for **INTERIOR_ELEMENTS_COMMON** entered by the assessor on the Assessor tool is displayed on the screen.

4.3.11 Property Tree

The **Property Tree** panel, when completely expanded, displays the Property, Sites, Buildings, Units and Common Spaces that belong to this Property.

  a. Click the arrow next to **Property Tree** panel.
b. Click the right-arrow to the left side of the Property name.

c. The **Property** name is expanded to display the **Site** information below the Property name.
d. Click on the name of the Site; the Site information is displayed on the right side of the panel.

![Site information panel]

![Building information panel]

E. Click the arrow on the left side of the Site’s name; here, **1500 Side**; the list of the buildings under this Site are displayed on the left side of the panel.

![Property Tree]

F. Click on the name of the Building; here, **1501 Northgate Square**; it displays the Building information on the right side of the panel.

![Building information panel]
g. Scroll down to view the complete information of this building. It displays the Common Spaces and Unit Types associated with this building.

![Image of Property Tree]

h. Similarly, click on other arrows and view the various Sites, Buildings and the associated Unit Types and Common Spaces under this Property.

4.3.12 Inspection Sample

The **Inspection Sample** panel displays the information on all the units that were inspected by the assessor.

![Image of Inspection Sample]

Scroll to the right to view the complete information of each of the inspected units.

4.3.13 Attachments

The **Attachments** panel displays any attachments that have been attached to this assessment. In this example, the submitted CNA is the only attachment.

a. Click the arrow next to the **Attachments** panel; the panel expands. To download the attachment to view, click on the icon to the right of the **Document Date** field.
As seen above, the actual CNA (Excel document) uploaded to the Submission page, will always be available for download in the attachments panel. Reviewers are able to make changes to the downloaded assessment and use the Validation screen to perform a “What-if-Analysis” to determine what impacts the changes would have on the schedule.

4.3.14 Reports

The Reports panel displays the option to view 7 different reports.

a. Expand the Reports panel by clicking the arrow next to the Reports panel; the below screen is displayed.

b. Click on each of the reports to view or download the report.

1. Snapshot:

This report gives an overview of the data captured in the assessment.

a. Click on Snapshot to open this report.

If you click on Snapshot and nothing happens, please look at the top of the screen to see whether there is a message about pop-ups. If so, then allow pop-ups to see the report.
Check the first radio button (Always allow pop-ups from to accept pop-up blocker) and then click the Done button.

b. The below screen is displayed on the screen.
c. Scroll down to view the complete report.
d. This report can be printed by clicking on the **Printable Version** button on the top right corner of the screen.
2. Critical Repair/Replacements (Immediate Needs):
   
a. Click on Critical Repair/Replacements (Immediate Needs) and the user is taken to the reports login screen.

   ![Sign In Screen](image1)

   b. Enter your username and password to login and the screen displays the below report. The report appears in a separate tab on your browser. See the example of the report below:

   ![Report Example](image2)

   c. The report appears in a separate tab on your browser. See the example of the report below:

d. Click on Non-Critical Repair/Replacements (Immediate Needs) and the user is taken to the reports login screen.

e. Enter your username and password to login and the screen displays the below report.

f. The report appears in a separate tab on your browser. See the example of the report below:

```
Oracle Business Intelligence

Sign In
Enter your user id and password.

Unable to Sign In
An invalid User Name or Password was entered.

User ID
Password

Sign In

Accessibility Mode

Non-Critical Repair/Replacements (Immediate Needs)

<table>
<thead>
<tr>
<th>Assessment Id:</th>
<th>Property Name:</th>
<th>Date Run:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-003221</td>
<td>Northgate Condos</td>
<td>3/26/2014</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section</th>
<th>Selected Alternative</th>
<th>Action</th>
<th>Location Observed</th>
<th>Quantity</th>
<th>Unit of Measure</th>
<th>Unit Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nice Drywall - better</td>
<td></td>
<td>Replace Location</td>
<td>500</td>
<td>LF</td>
<td>$1.00</td>
<td>$500.00</td>
<td></td>
</tr>
</tbody>
</table>

Grand Total: $500.00
```


a. Click on Non-Critical Repair/Replacements (Future Needs) and the user is taken to the reports login screen.
b. Enter your username and password to login and the screen displays the below report.
c. The report appears in a separate tab on your browser. See the example of the report below:

![Image of a business intelligence sign-in screen]

5. **Property Insurance Schedule:**

This is a report that consists of the Property Insurance Schedule of Replacement Cost (HUD Form 92329). The report is generated in a PDF format that can be opened or downloaded and saved.
a. Click on the Property Insurance Schedule Report link to generate the report.

b. When prompted choose either “Open With” to open the report now or “Save File” to save the report to your computer.

c. Below is an example of the Property Insurance Schedule Report:
6. Financial Schedule:

a. Click on the Financial Schedule link and the user is taken to the reports login screen.

b. Enter your username and password to login and the screen displays the below report.

c. The report appears in a separate tab on your browser. See the example of the report below:
7. Estimate Period Recap:

a. Click on the Estimate Period Recap link and the user is taken to the reports login screen.

b. Enter your username and password to login and the screen displays the below report.
c. The report appears in a separate tab on your browser. See the example of the report below:

![Estimate Period Recap](image)

8. **Building Unit Mix:**

   a. Click on the Building Unit Mix link to open the report

   ![Tips]

   If you click on Building Unit Mix and nothing happens, please look at the top of the screen to see whether there is a message about pop-ups. If so, then allow pop-ups to see the report.
b. The below screen is displayed on the screen.

![Building Unit Mix for Greenboro](image)

9. **Assessment Summary Report:**

   The Assessment Summary Report is a report generated in a PDF format that can be opened or downloaded and saved.

d. Click on the Assessment Summary Report link to generate the report.
e. When prompted choose either “Open With” to open the report now or “Save File” to save the report to your computer.
f. Below is an example of the Assessment Summary Report:
10. Export CNA

The **Export CNA** panel provides an additional place to export various files to an excel document, where it can be printed, emailed, etc.

a. Expand the **Export CNA** panel by clicking the arrow next to **Export CNA** panel; the below screen is displayed.

![Export CNA panel](image)

b. Click “**Estimate Period Schedule**”; the file is downloaded and displayed on the left side corner of the screen.

![Estimate Period Schedule](image)

c. Click on the file “**EstimatePeriodSchedule...**” to display the report.
d. This report can be saved, printed, emailed, etc. However, any updates made to this file will not be reflected in the submitted CNA.

4.3.15 Agency CNA Decision

In this panel, the reviewer has the ability to either **Accept** or **Reject** the submitted CNA. It also allows the reviewer to add a comment in the **Reviewer Comments** section.

a. Expand the **Agency CNA Decision** panel by clicking the arrow next to **Agency CNA Decision** panel; the below screen is displayed.

b. Enter the text in the Reviewer Comments box and click the **“Approve”** or **“Reject”** button.

c. A pop-up box with a message that the CNA has been either approved or rejected is displayed on the screen.
d. Click the OK button; the user is taken back to the Locate CNA screen where the status has been updated.

When a decision has been made on an assessment, an email is sent to the original submitter and the reviewer is copied with a record of the decision.

4.3.16 Undo Approval

After a CNA has been approved a reviewer has the ability to undo the approval of an approved CNA by using the "Undo Approval" button. When a CNA is unapproved the status of the CNA is changed back to Under Review. In order to undo the approval of an assessment, the following conditions must be true:

I) The assessment Internal Status = “Approved”

II) The assessment was approved in the last 180 days

III) A user may only undo an approval for an assessment in which the user’s agency is the Approving Agency for the assessment
IV) The user must have an Assigner role

To undo an approval, in the Agency Decision Panel, the reviewer selects the *Undo Approval* button.

a. Locate the CNA in the Locate CNA screen and drill down on the **Assessment ID** field to display the CNA details.

b. Expand the **Agency CNA Decision** panel by clicking the arrow next to **Agency CNA Decision** panel.

c. Click the “**Undo Approval**” button.

d. After clicking “**Undo Approval**” the following confirmation dialog box is displayed. Click “**OK**” to continue.

e. The CNA is sent back to **Under Review**.
5. Administrative Functions

Administrative functions are performed by users of the web tool with the Data or Security Administration roles. These functions allow users to create flags, update drop-down list data, add users, and create customized reports.

5.1 Flag Admin

When a user with the Data Administrator role logs into the eTool, they will be able to see all available tabs as seen below.

a. Click on the “Flag Admin” sub-tab to view the contents of this tab.

b. The below screen is displayed.
5.1.1 Search Flag

The user has the ability to search for a flag.

a. Click the down arrow button on the Flag ID drop-down.

![Image of Flag ID drop-down]

b. All the available flags are displayed in the drop list.

![Image of drop list with flags]

c. Select one of the flags; here, AA-001 is chosen for this example and click the Search button.

![Image of Search button clicked]

d. The selected flag – AA-001 is displayed on the row.
5.1.2 Create Flag

The administrative user has the ability to create new manual flags for reviewers to add to assessments.

a. Click the Create button on top of the table.

b. The below screen is displayed on the screen.

c. To choose a category, click the down arrow button on the Category box.
In this case we have chosen “Assessment” from the list of values.

d. Select a Severity that will be tied to the flag (Severe, Warning, or Informational). In this case we have selected “Warning” from the Severity drop-down options.

e. Enter a date in the “Effective Date” for which the flag will take effect. In this example, we have chosen 8/1/2014, which means that starting on August 1 users will be able to assign this flag to assessments manually. If there is a determined “End Date” when the flag should no longer be available for use, a user can select the end date, in this example 7/31/2015.
f. Enter text for **Cause Note Template**. This will be what is displayed next to the flag Name/ID that describes the flag.

g. Click the **Save** button to save the new flag.

h. Upon saving, the new flag is given the next available flag ID within that category. In this example, the new flag is **AA-014** and displayed on the table.
5.1.3 Edit Flag

A **Data Administrator** user has the ability to edit manual flags.

a. Click the **Edit** button in the **Flags** panel.

b. The below screen is displayed.

c. Once on this screen, users can update information about the flag. In this example, the **Severity** was changed from **Warning** to **Informational**. Click the **Save** button to save the flag.
d. The below screen is displayed with the **Severity** as “I”.

![Search Flag](image)

### 5.2 LOV Admin

The user with the **Data Administrator** role has the ability to manage List of Values (LOV) items. In order to update the list of values for assessment data, the user will have to first change the LOVs in the Assessor tool and then update these values on the web tool.

#### 5.2.1 LoV Maintenance on the Web Tool

![Search LOV](image)

1. **Search LOV**
   
   The user has the ability to search for the List of Values.
   
   a. Click the down arrow button on the **List ID** drop-down.
b. Choose one of the options from the drop-down list. Here, *Utility type* is chosen.
c. After selecting the item, the below screen is displayed. Click the **Search** button to display the selection.

d. The below screen displays the resulting List of Values.
2. Add

The user with the **Data Administrator** role has the ability to add to the List Of Values.

a. Click the **Add** button to add a new LOV.

b. The below screen is displayed.

c. Click the drop-down arrow of the **List ID** box.
d. In this example, **UNIT_STATUS** has been chosen from the list displayed.

![Image of CNA eTool - User Manual page 60](image)

e. Enter the new value in the **Value** field and if desired, give the value a description in the **Description** box.
3. **Edit**

   The user with the **Data Administrator** role has the ability to edit the List Of Values.

   a. Choose the category that needs to be edited from the **List ID** drop-down options.
Here, **UNIT_STATUS** is selected.

b. Click the **Search** button to display the list of values of **UNIT_STATUS**.

c. The List of Values for **UNIT_STATUS** is displayed on the screen.
Choose one of the items from the list that needs to be edited. Here, **Under Renovation** is chosen.

Click the **Edit** button to edit the LOV.

The below screen is displayed.
g. Users can change the text in the Value and the Description boxes. In this case, “Under Renovation” was updated to “Under Repair”.

h. Click the Submit button to accept the changes.
i. The updated values are displayed on the main screen.

4. Delete
The user with administrative privileges has the ability to delete the value from the LOV list.

a. Choose UNIT_STATUS from the list of values.

b. Click the Search button to display the list of values.
c. The list of values for **UNIT STATUS** is displayed in the table.

d. Click on the item from the table that needs to be deleted. Here, “Under Repair” is chosen.

e. Click the **Delete** button to delete the selection.
f. A pop-up box with the below message is displayed on the screen.

![Delete List Item](image)

**Delete List Item**
Are you sure you want to delete the selected list item

- **OK**
- **Cancel**

Click the **OK** button to delete the selection. Upon clicking **OK**, the item is deleted from the list and the final list is displayed on the screen.

5.3 Text Template Admin

The user with the **Data Administrator** role has the ability to manage Text templates.
5.3.1 Search Template

The user has the ability to search for the various templates that control what text is shown where on the system (i.e. emails, certification messages, etc.).

a. Click the down arrow button on the Template Purpose drop-down.

b. Choose one of the options from the drop-down list. Here, Approved Assessment is chosen.
c. Click the **Search** button to display the selection.

![Search button](image)

The below screen displays the result. For this text template, there are three different templates based on the Agency a CNA is submitted to.

![Search result](image)

5.3.2 Edit Template

The user with the **Data Administrator** role has the ability to edit the Text templates.

a. Choose the category that needs to be edited from the **List ID** drop-down options.

![List ID drop-down](image)
Here, **Approved Assessment** is selected.

b. Click the **Search** button to display the list of values of **Approved Assessment**.

c. The templates for **Approved Assessment** is displayed on the screen.

d. Choose one of the items from the list that needs to be edited. Here, **HUD** is chosen.
e. Click the **Edit** button to edit the template.

f. The below screen is displayed.

<table>
<thead>
<tr>
<th>Agency</th>
<th>ActiveFlag</th>
<th>TemplateText</th>
<th>Version/Stamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUD</td>
<td>Y</td>
<td>The assessment you submitted was approved – HUD</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>Y</td>
<td>TEMPLATE TEMPLATE The assessment you submitted was approved – Other</td>
<td>0</td>
</tr>
<tr>
<td>USDA</td>
<td>Y</td>
<td>TEMPLATE TEMPLATE The assessment you submitted was approved – USDA</td>
<td>0</td>
</tr>
</tbody>
</table>

Enter the updated text in the text box: Here, “The assessment you submitted was approved – HUD Management” was entered.
h. Click the **OK** button to accept the changes.

i. The updated values are displayed on the main screen.
5.4 Component Type / EUL Admin

The Component Type / EUL Admin tab is used to update the EUL table values (name and prescribed estimated useful life). This screen is made up of three different panels – **Need Category**, **Need Item** and **Component Type**. The user with **Data Administrator** privileges has access to add and/or edit various Need Categories, Need Items and/or Component Types.

5.4.1 Need Category

1. **Search**

   The user has the ability to search for the Need Category.

   a. Click the arrow on the left side of **Search** within the **Need Category** panel to expand the Search option.
b. Click the down-arrow button of the **Need Category Name**.

c. The below screen is displayed.
d. Select a value from the list of values displayed on the screen and click on the **Search** button.

![Search button with list of values](image1)

e. The below screen is displayed.

![Need Category Search](image2)

2. **Add**

The user has the ability to add a new Need Category.

a. Click the **Add** button in the **Need Category** section.

![Add button highlighted](image3)

b. A box with details to add the new Need Category is displayed on the screen.
c. Enter the values into the following fields and click the **OK** button.

d. The new category is added to the list of values.

e. When the user clicks on the **Search** button, the below screen is displayed.
3. **Edit**

The user has the ability to edit the *Need Category*.

a. Choose the category that needs to be edited from the *Need Category Name* drop-down options and click the **Search** button.

b. Click the **Edit** button to edit the template.

c. The below pop-up panel is displayed.
d. Update the text in the following text box.

![Image of text box]


e. Click the OK button to accept the changes.

![Image of OK button]

f. The updated values are displayed on the main screen.

![Image of updated values]

5.4.2 Need Item

1. Search

The user has the ability to search for the Need Item.

   a. Click the arrow on the left side of Search button within the Need Item panel to expand the Search option.
b. Click the down-arrow button of the **Need Item Name**.

c. The below drop-down menu is displayed.
d. Scroll down and select a value from the list of values displayed on the screen and click on the **Search** button.

![Image of search function](image)

![Image of search results](image)

e. The below screen is displayed on the screen.

2. **Add**

The user has the ability to add a new Need Item.

a. Click the **Add** button in the **Need Item** section.

![Image of add button](image)

b. A pop-up box with details to add the new Need Category is displayed on the screen.
c. Enter the information on the following fields and click the OK button.

![Add Need Item Dialog]

d. The new category is added to the list of values. Scroll down to view the newly added Need Item.

![Search Panel]

e. When clicked on Search button, the below panel is displayed.

![Search Panel with Need Item Added]
3. Edit

The user has the ability to edit the **Need Item Name**.

a. Choose the category that needs to be edited from the **Need Item Name** dropdown options. Here, New Need Item is selected. Click the **Search** button.

```
Need Item
View + | Add | Edit |Detach
Need Item Name | New Need Item |
```

b. Click the **Edit** button to edit the template.

```
Need Item
View + | Add | Edit |Detach
Need Item Name | New Need Item |
```

c. The below popup box is displayed on the screen.

```
Manage Need Item
Need Item Name | New Need Item |
ASTM Code | S.1.1.1 |
Description | New Need Item |
```

d. Enter the text to be edited into the following text box.
e. Click the OK button to accept the changes.

f. The updated values are displayed on the main screen.

5.4.3 Component Type

1. Search
The user has the ability to search for the Component Type.

   a. Click the arrow on the left side of Search in the Component Type panel to expand the search option.
The user can search for a component type by selecting a Need Category, Need Item or both of these options to narrow the search.

b. Click the down-arrow button of the **Need Item ID**.

c. The below screen is displayed on the screen.
d. Scroll down and select a value from the list of values displayed on the screen and click on the **Search** button.

e. All the related component types under this need item are displayed on the screen.
2. **Add**

The user has the ability to add a new Component Type.

a. Click the **Add** button in the **Component Type** panel.

b. A box with details to add the new Component Type is displayed on the screen.
c. Enter the following values to add a new Component Type and click the OK button.

d. On the main screen, select the value added from the drop-down values of Need Category ID and from the drop-down values of Need Item ID and click the Search button.
e. The new component type is added to the list of values.

3. Edit

The user has the ability to edit the Component Type.

a. Select the appropriate **Need Category ID** and **Need Item ID** and click the **Search** button.

a. The below panel is displayed.
b. Select the Component Type to edit, in this case **Water Tank** from the list displayed, by clicking on the line and click the **Edit** button to edit the Component Type.

c. The below pop-up box is displayed.
d. Enter the changes in the following text box and click the OK button to accept the changes.

e. The updated values are displayed on the main screen.
5.5 Reports

The user with Data Administrator privileges has the ability to view process monitoring and analytical reports across the portfolio of assessments by clicking on the Reports tab. The following section gives an example of each of the report links shown below. To access each report, click on the desired report link in the Reports screen.

5.5.1 Nightly Reports
The “Assessment Workload/Volume Metrics” and “Property Assessment Assignment Aging” can be run as needed, but are also scheduled nightly reports. The reports are scheduled to generate automatically each night and are emailed in PDF format to a distribution list. Contact your system administrator to be added to the distribution list to receive these reports.

5.5.2 Answers
The first link is a link to “Answers” which is an Oracle out of the box reporting tool allowing users to create Ad Hoc reports on data from assessments currently in the system. For more information on how to use/navigate through Answers, please see the Oracle Answers user manual.

When a user clicks on the “Answers” link they are taken out of the CNA eTool and to the Answers tool as shown below.
5.5.3 Component Type Useful Life Variances

The Component Type Useful Life Variances report displays the variances of Component Type useful life on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.

5.5.4 Component Type Price Variances

The Component Type Price Variances report displays the variances in Component Type price on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.
5.5.5 Properties with Out-Of-Date Assessments

The Properties with Out-Of-Date Assessments report displays the properties with out-of-date assessments on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.

5.5.6 Assessment Workload / Volume Metrics

The Assessment Workload / Volume Metrics report displays the Assessment Workload / Volume Metrics on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.

This report is also a scheduled nightly report that is emailed in PDF format to a distribution list. Contact your system administrator to be added to the distribution list to receive these reports daily.
5.5.7 Property Assessment Review Aging

The Property Assessment Review Aging report displays the Property Assessment Review Aging on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Property State</th>
<th>Date Assigned</th>
<th>Assigned Reviwer</th>
<th>Age in Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northgate Homes</td>
<td>VA</td>
<td>07/12/2014</td>
<td>FIRST - MONT4 LAST - MONT6</td>
<td>26</td>
</tr>
<tr>
<td>Northgate Homes</td>
<td>VA</td>
<td>07/12/2014</td>
<td>FIRST - MONT4 LAST - MONT6</td>
<td>26</td>
</tr>
<tr>
<td>Northgate Homes</td>
<td>VA</td>
<td>07/12/2014</td>
<td>FIRST - MONT4 LAST - MONT6</td>
<td>26</td>
</tr>
<tr>
<td>Northgate Homes</td>
<td>VA</td>
<td>07/12/2014</td>
<td>FIRST - MONT4 LAST - MONT6</td>
<td>26</td>
</tr>
</tbody>
</table>

5.5.8 Property Assessment Assignment Aging

The Property Assessment Assignment Aging report displays the Property Assessment Assignment Aging on a separate tab. This report can be printed or exported to an excel spreadsheet by clicking on Print or Export at the bottom left side of the screen.
This report is also a scheduled nightly report that is emailed in PDF format to a distribution list. Contact your system administrator to be added to the distribution list to receive these reports daily.
5.6 Security

5.6.1 Authentication (provisioning new credentials)

In order to receive new credentials, users will need to complete a CHAMPS request of request an "I" ID through WASS. This is managed outside of the CNA eTool.

5.6.2 Authorization (granting / revoking roles)

The user with the security administrator role has the ability to either grant or revoke roles from a user.

a. The user logs into the WASS system with proper credentials.

b. Scroll down to the bottom of the screen to **Accept** the conditions displayed on the screen.
c. The below screen is displayed on the screen.

d. Click on **User Maintenance**; the below screen is displayed.
e. Enter a User ID in the provided box and click **Search for User** button. Here, user ID, **MCNT01** is entered.

f. The credentials for user **MCNT01** are displayed below.
g. Click the drop-down arrow for **Choose a Function** option.

h. Choose **Maintain User Profile – Roles** from the drop-down list and click the **Submit** button.
The below screen shows the current role the selected user MCNT01 has and the available roles that can be assigned to this user.
NOTE: This user has **CNC – External Submitter** role, and can be assigned any other roles displayed in the list.

j. Check the box which correlates to the role to be assigned to the user, in this case—**CNE – External Viewer** to assign external viewer role to this user, and click on **Assign/Unassign Roles** button.

k. This user is given the assigned role and click on the **Confirm** button.
I. The user has successfully been assigned a new role.
Appendix A

This section covers the common features within a panel. All these features are applicable to all the panels on each tab.

A1: View

A1a: Columns

m. For demo purposes, let’s look at the *Inspection Sample* panel on the *Locate CNA* tab, displayed below.

n. Click the drop-down arrow on the right side of **View**.
o. The below screen is displayed.

![Image of a table with columns](image)

p. Move the cursor over **Columns** and the below screen is displayed on the screen.

![Image of a dropdown menu for columns](image)

q. To hide one column at a time, click on any of the checked items to be unchecked. Here, **Building Inspected** is selected.
r. As soon as this field is selected, the user is taken to the main screen with the selected column hidden. **NOTE:** *Building Inspected* is hidden in the screen below.

s. To hide multiple columns at a time, click on *Manage Columns*... under *Columns* options.

t. The below screen is displayed on the screen.
u. Select the column that needs to be hidden and click the left-arrow button. Here, *Inspection Status* is selected.

v. The selected entry, *Inspection Status* is moved to the box labeled *Hidden Columns*.

w. Click **OK** button to return to the main screen. **NOTE:** Columns Building Inspected and Inspection Status are hidden. Any column that needs to be hidden can be hidden in the same way.
A1b: Reorder Columns

a. Click on Reorder Columns... from the drop-down option of View.

b. The below is displayed on the screen.

c. Click on one of the entries that need to be moved. Here, Property Id is selected.
d. Note that the 2 down arrows are highlighted.

```
<table>
<thead>
<tr>
<th>Property Id</th>
<th>Site Id</th>
<th>Unit Floor</th>
<th>Unit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-000100</td>
<td>1000</td>
<td>1</td>
<td>A1A, 1A, 650</td>
</tr>
<tr>
<td>2014-000500</td>
<td>1000</td>
<td>1</td>
<td>B3B, 1A, 650</td>
</tr>
<tr>
<td>2014-000100</td>
<td>1400</td>
<td>1</td>
<td>A1A, 1A, 650</td>
</tr>
<tr>
<td>2014-000500</td>
<td>1400</td>
<td>1</td>
<td>B3B, 1A, 650</td>
</tr>
<tr>
<td>2014-000500</td>
<td>1400</td>
<td>2</td>
<td>A1A, 1A, 750</td>
</tr>
</tbody>
</table>
```

f. Click OK button to accept the change and the screen is displayed on the screen. 
NOTE: Now, Property Id is the second column.

e. If you choose the single down arrow, the selected entry would go down one below the existing entry.
g. If you click on the double down arrow, the selected would be moved as the last entry in the list. Scroll down to see this value.

h. Click OK button to accept the change and the following screen is displayed.

i. Scroll to far right to view this column. The panel also displays how many columns have been hidden. NOTE: Similarly, you can move the other entries up or down.
A2: Detach

When the user clicks on the **Detach** button, the whole panel is detached from the screen and is displayed as a separate screen.

a. Click on the **Detach** button within the **Inspection Sample** panel.

b. The below screen is displayed.

c. This panel is similar to an Excel spreadsheet. The user is able to print, export, change column widths, etc., as with any Excel spreadsheets.

d. Click the at the top right side corner of the page to close this panel.
The user is taken back to the main screen.

A3: Sorting within a column:
The user is able to sort the entries in an ascending or the descending order within a column.

A3a: Sort in ascending order:

a. Move the cursor over to any of the columns. Here, move the cursor over Unit Type.

Note: There are up and down arrows displayed on the column.
b. Click the **up** arrow to sort the column in an ascending order. The values are sorted in the ascending order.

c. Click the **Down** arrow to sort the column in a descending order. The values are sorted in the descending order.

A4: Export

These panels can be exported to excel spreadsheet and the reports can be printed, emailed, etc., as any other excel spreadsheet.

  a. Click the **Export** button within the panel.
b. The file is exported and the name is displayed at the bottom left side of the screen.

c. Click on the file name; here, **InspectionSample(1).xls** to display the file. The file is exported onto an excel spreadsheet and the user is taken to the file.