ACCOUNT MANAGER

Version 1.2.2

Wednesday, December 14, 2016

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User Role Definitions

There are two types of roles which can be assigned to users. Non-Privileged and Privileged. Non-Privileged roles are assigned to users who will be managing incidents and the resources assigned to those incidents. Privileged roles are assigned to users who manage user account data and global reference data. Privileged roles vary from Account Managers, at least one in each office/incident, to national roles which are extremely limited.

In the Enterprise version of e-ISuite, many local unit managers may have any number of Non-Privileged roles assigned to them because any one of them could initiate an incident or perform other functions available in e-ISuite. The role of Data Steward becomes important in this situation because it is the role that creates new incidents and assigns users to those incidents. Below is a brief description of the roles in e-ISuite and their associated functions:

- Privileged User
    - **Account Manager**: Responsible for managing User Accounts, assigning roles and auditing User Account activity in Enterprise.
    - **Data Manager**: Responsible for managing other Data Manager user accounts - Global Data Managers and Geographic Rates Managers.
    - **Geographic Rates Manager**: Allows the user the ability to establish and update rates for their geographic area resources.
    - **Global Reference Data Manager**: Provides the ability to manage the reference data for the entire e-ISuite system including cost rates, Unit IDs and Agency information.
    - **Help Desk**: Allows the user with this role to generate a site access key that allows privileged users at a site to create an Account Manager user account when they are locked out of the system. This role is also responsible for recovering database passwords for a Site database.
- Non-Privileged User
    - **Data Steward**: Provides the ability to manage Incident data, including creating and editing incidents, importing ROSS files, transferring data between Site and Enterprise, managing Non-Standard Reference Data and creating a Financial Export file for an incident/incident group.

- **Check-In/Demob**: Responsible for checking in and demobing resources at an Incident.

- **Time**: Responsible for posting time and adjustments, managing time data and generating invoices for a resource.

- **Cost**: Allows the user to manage Cost data, which includes generating daily costs and reports, creating cost projections and extracting accruals.

- **IAP**: Responsible for creating and managing Incident Action Plans.

- **Training Specialist**: Allows the user to enter and manage data for trainees on an incident.

Account Manager Role

The Account Manager role is a privileged role, meaning that a person with the Account Manager role manages User Accounts for other users of e-ISuite and performs database management activities in e-ISuite Site. The Account Manager role is identified with the letters "ad." as a prefix in the user account. For example, an Account Manager user account for JohnDoe would read: ad.jdoe

A user with the Account Manager role has access to specific functionality in both e-ISuite Enterprise and Site, but they cannot perform other functions within e-ISuite. Conversely, a non-privileged user account (a user account that does not have the "ad." prefix) cannot access any portion of the system that deals with managing user accounts and roles, or database activities in Site.

The following is a list of activities that can be performed by an Account Manager:

Enterprise:

- Auditing
- Add privileged and non-privileged user accounts from NAP
- Remove a user account
- Manager user account roles - add and remove roles
- User Sessions - view logged in users; disconnect logged in users

Site:

- Create a new database
- Edit a Site database
- Copy a Site database
- Back-up a Site database
    - Manually
    - Set Automatic back-up
- Restore a Site database
- Merge Site databases
- Create, edit, delete privileged and non-privileged user accounts
- Manage user account roles - add or remove
- Enable/Disable user accounts
- Import/Export user accounts
- Reset user account passwords

Message Board

Users with the Account Manager role can Add, Edit and Delete the text that displays in the Message Board area on the Home Page in Site. Follow the steps in this section to manage the messages that display on the message board:

1. From the Home page, select the **Message Board Admin** button. The **Message Text** window displays.

2. In the message text window, type the message to display on the Message Board.
3. Once the message is typed, the user can apply multiple formatting options to the text. These include:

   - Changing the font size (default is 12)
   - Adding highlights such as: Bold, Italic and Underline
   - Changing the color of the text
   - Changing the alignment of the text (left, center, right or fully justified)
   - Adding a bullet to the text

4. Click **Save** to save changes to the message in the Message Board.

NOTE: Access to the Message Board in Enterprise is restricted to members of the e-ISuite Project Team.

Enterprise User Accounts Overview

A person can only access the e-ISuite Enterprise system if they have a valid account in NAP. Contact the NAP administrator to add e-ISuite to the user's current NAP user account, or access the NAP webpage and follow the instructions to request a new NAP user account. (https://nap.nwcg.giv/NAP). Once a person has a NAP user account, the e-ISuite Account Manager can add that account to the e-ISuite Enterprise system. After a user account has been added, the Account Manager will assign the roles necessary to perform different functions within e-ISuite Enterprise.

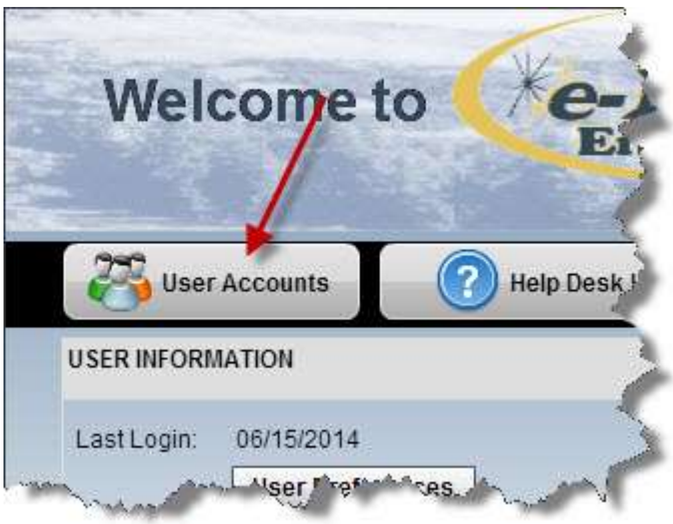
- Adding User Accounts from NAP
- Changing a User Account Password
- Editing User Accounts
- Deleting User Accounts
- Enable/Disable User Accounts

Adding User Accounts from NAP to e-ISuite Enterprise

Follow the steps in this section to add a user account to the e-ISuite Enterprise system:

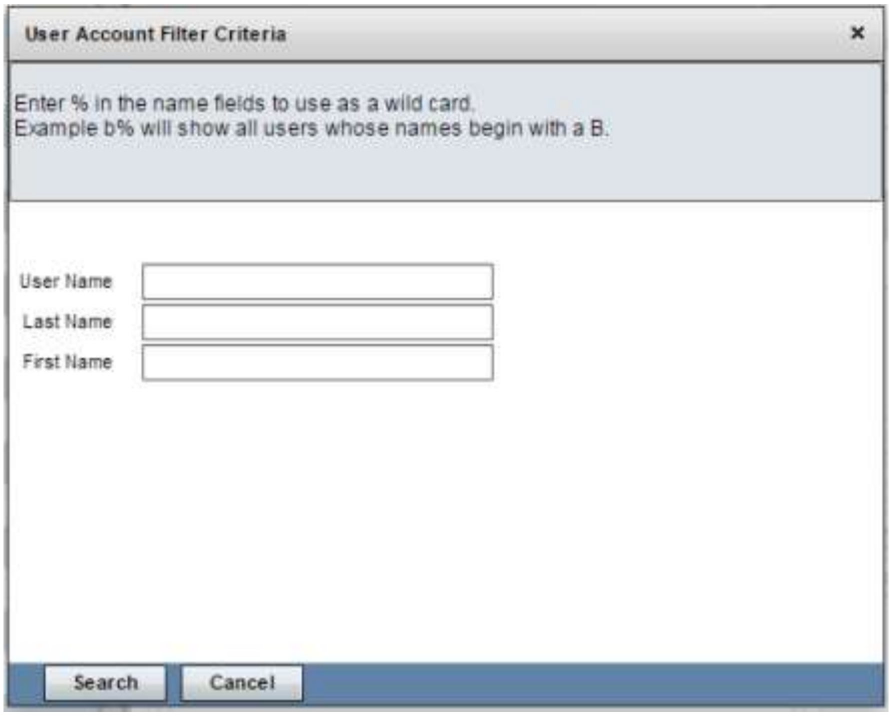
NOTE: In e-ISuite Enterprise, user accounts are created in NAP, and not in e-ISuite Enterprise. All User Accounts must be validated through NAP. Click on Request User Account at https://nap.nwcg.gov/NAP/#. After a user account is established in NAP, an e-ISuite Account Manager will add the account to e-ISuite Enterprise and assign roles as needed for the user to perform their duties.

1. Log in using a Privileged user account (the account begins with ad.).
2. On the Home page, click the **User Accounts** button.



3. On the Manage User Accounts page, click the **Add User from NAP** button.

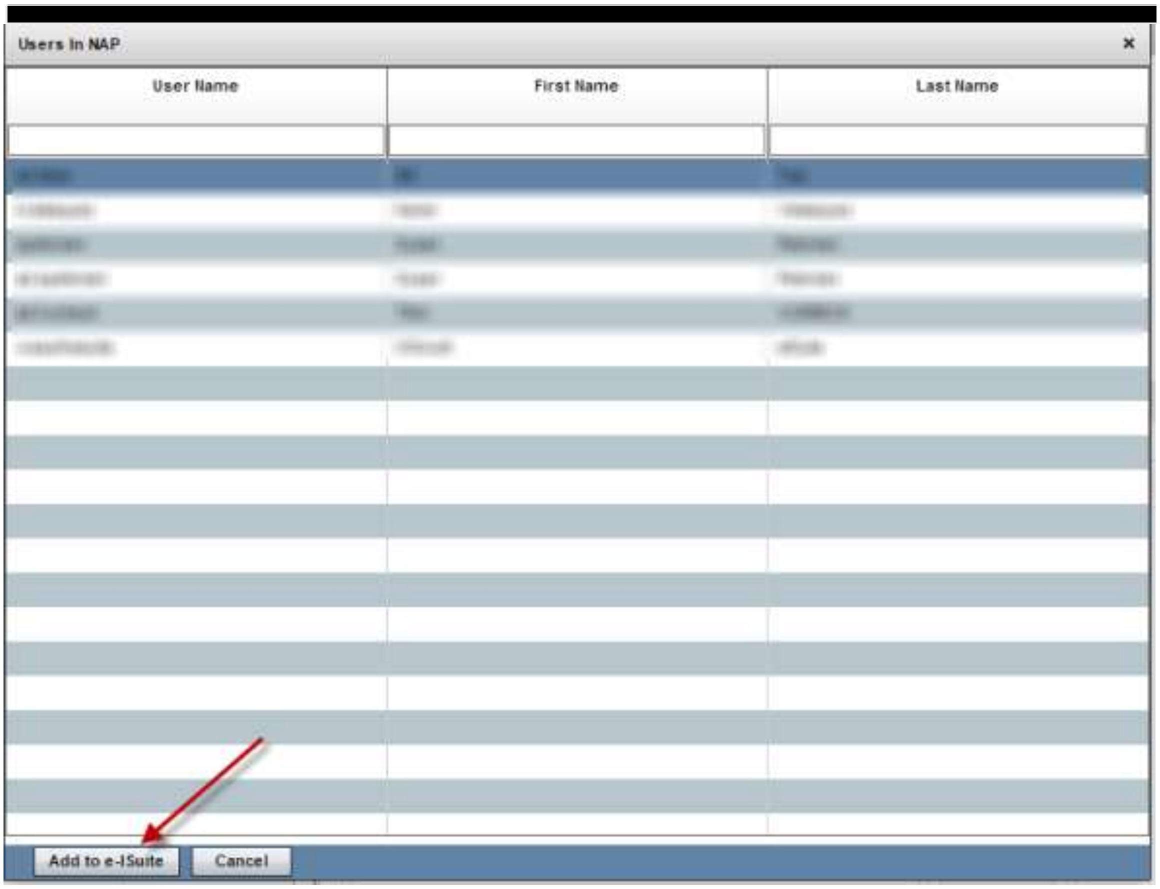
4. Enter the search criteria to search for user accounts in NAP. Search criteria can include Unit ID, Last Name or First Name.



NOTE: Enter "%" into either the Last Name or First Name field to use as a wild card. For example, b% would show all users whose names begin with the letter B.

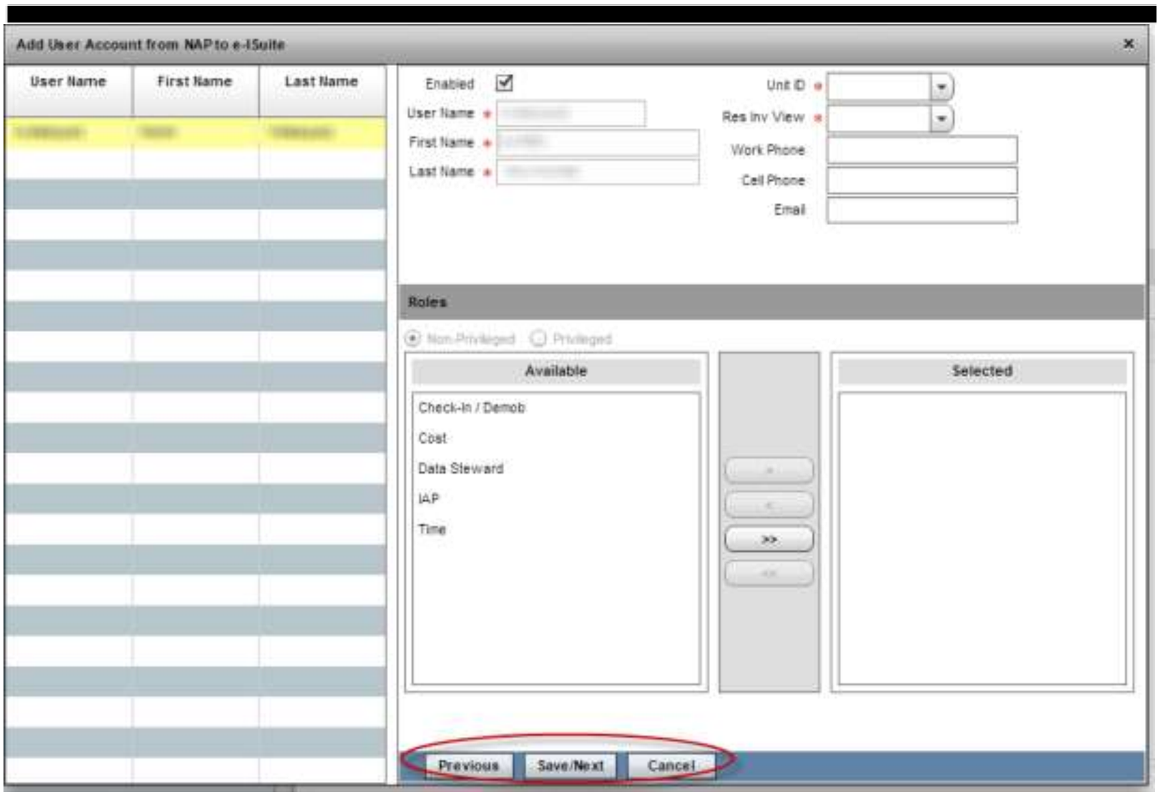
5. Click the **Search** button to search for all resources that meet the search criteria.

6. When the Users in NAP list displays, select one or more users to add to the e-ISuite Enterprise System.



NOTE: To select multiple users, hold down the Ctrl key and click the user names.

7. Click the **Add to e-ISuite** button to add the user account(s) to the e-ISuite Enterprise system.



8. Select the user's **Unit ID**.

9. Select the **Resource Inventory View** for the user account.

NOTE: The Resource Inventory View identifies the resources within the Resource Inventory to which the user account will have access. The user can then add those resources to an incident in Enterprise. The Resource Inventory View can be changed if needed to accommodate a user assisting in different offices that have a different set of resources in their Resource Inventory.

10. Enter the user account's **work phone number**.

11. Enter the user account's **cell phone number**.

12. Enter the user account's **email address**.

13. If the user account is a privileged account (the account begins with ad.) only the roles that can be assigned to a privileged account will display in the shuttle box. If the user account is a non-privileged account only the roles that can be assigned to a non-privileged account will display.

14. Select one or more roles to assign to the user account from the Available list. Then click the **>** button to assign the role(s) to the user account.

NOTE: Click the **>>** button to assign all roles to the user account.

NOTE: NAP establishes whether a user account is Privileged or Non-Privileged. The e-ISuite system will indicate what type of account it is by auto checking either the Non-Privileged or Privileged radio buttons above the Available Roles shuttle box. Those radio buttons cannot be edited.

15. Click **Save/Next** to add the User Account and move to the next record on the list.

16. On the last User Account from NAP, click the **Save/Next** button to save the changes and then close the **Add User Account from NAP to e-ISuite** window.

NOTE: The Account Manager will need to assign the Data Steward role to a specified user account. The Data Steward role is a non-privileged role which can add other user accounts to incidents. See the section on Incident Users for further detail.

Changing a User Account Password in e-ISuite Enterprise

Since user accounts are established and managed through NAP, changing a password must also be done through the NAP webpage. There is no ability to change a user's password in e-ISuite Enterprise.

Log on to https://nap.nwcg.gov/NAP and follow the steps to change the password.

Editing User Accounts in the e-ISuite Enterprise System

User Account information that can be edited in Enterprise:

- The account can be disabled or enabled.
- Unit ID
- Resource Inventory View
- Work Phone
- Cell Phone
- Email address
- Roles

Because the accounts are established through the NAP, the user name cannot be edited.

Follow the steps in this section to edit a user account in e-ISuite Enterprise:

1. Login using a privileged user account (the username begins with ad.).
2. On the Home page, click the **User Accounts** button.

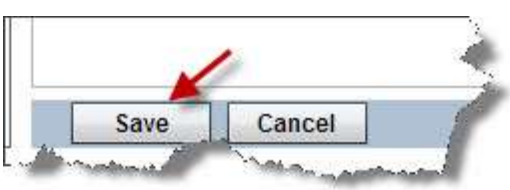
3. On the User Accounts screen select a User Account to edit in the grid.
4. Click the **Edit User** button.

5. Edit the user account's data.

6. If the roles are being modified, only the roles that can be assigned to either a privileged or non-privileged account will display, respectively. The account cannot be edited to change it from a privileged to a non-privileged account, or from a non-privileged to a privileged account.

NOTE: Click the **>>** button to assign all roles to the user account.

7. Click **Save**.



Deleting User Accounts

Follow the steps in this section to delete a user account from the e-ISuite Enterprise system:

1. Login using a privileged user account (the username begins with ad.).

2. From the Home page click the **User Accounts** button.

3. Select the user account to be deleted.

4. Click on the **Delete User** button.

5. A message will display asking to confirm the deletion. Click **Yes** to delete and remove the selected User Account. Select **No** to cancel the process.

A user account that has been used to access the system cannot be deleted, it can only be disabled.

When a user account is deleted from e-ISuite Enterprise, it is NOT deleted from NAP. The user account is still valid in NAP, and can be added to Enterprise again, if needed, provided it is in a valid state in the NAP system (current password, etc.).

Site User Accounts Overview

Before User Accounts can be created, the Site database must be downloaded and installed, and the initial Account Manager user account must be created. Follow the instructions below to download, install and setup the initial Account Manager user account.

After the Site database has been installed and the Account Manager user account has been created, the Account Manager can then add user accounts to the Site database. A person must have a valid user account in the e-ISuite Site database in order to log into the system.

User Accounts provide each user with the roles necessary to perform different functions within the e-ISuite System.

- Downloading and installing e-ISuite Site
- Setting up the initial Account Manager user account
- Adding User Accounts
- Editing User Accounts
- Delete User Accounts
- Changing Passwords
    - Account Manager Re-set Password
- Enable/Disable User Accounts
- Export/Import User Accounts

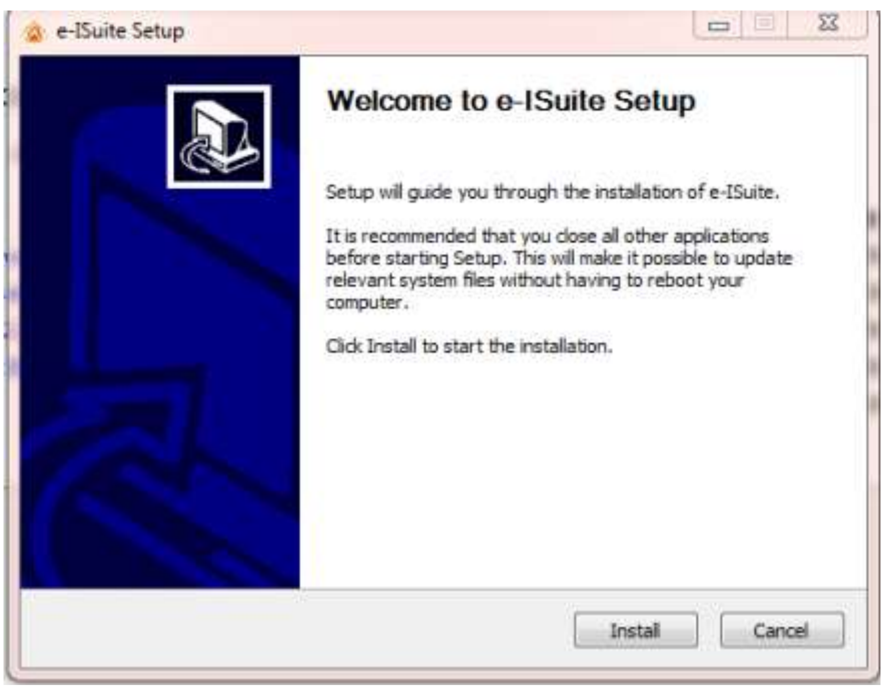
Downloading and Installing e-ISuite Site

Follow these instructions for Site Installation and setup:

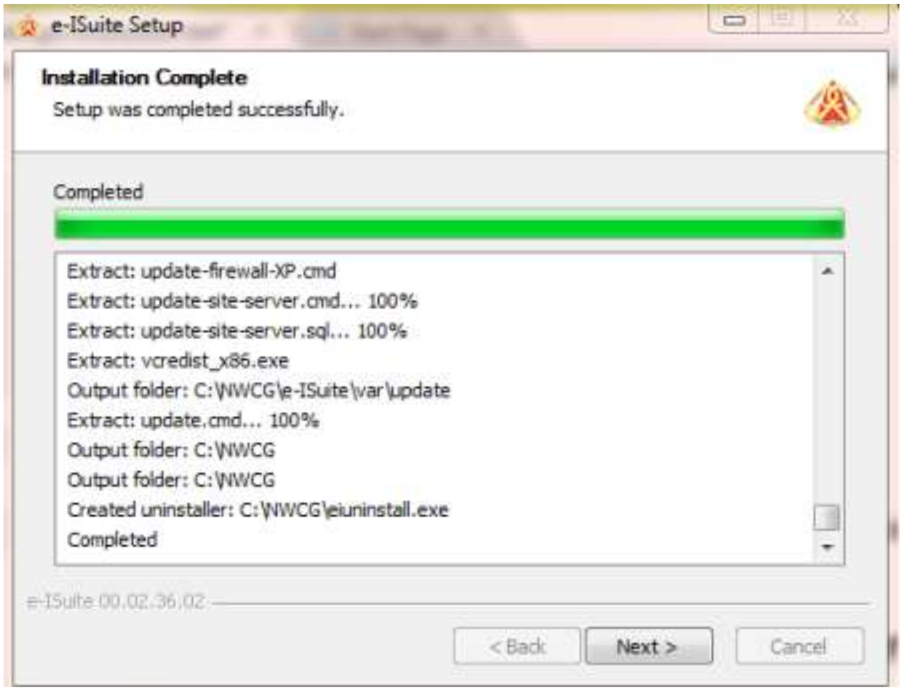
(These instructions are also included in the *Getting Started* and *Incidents* User Guide).

NOTE: e-ISuite Site only needs to be installed on the Site server. There is no need to install it on every computer at the site. All other computers will access Site by entering the appropriate URL into an Internet browser or double clicking the e-ISuite Site icon that can be created on the computer's desktop.

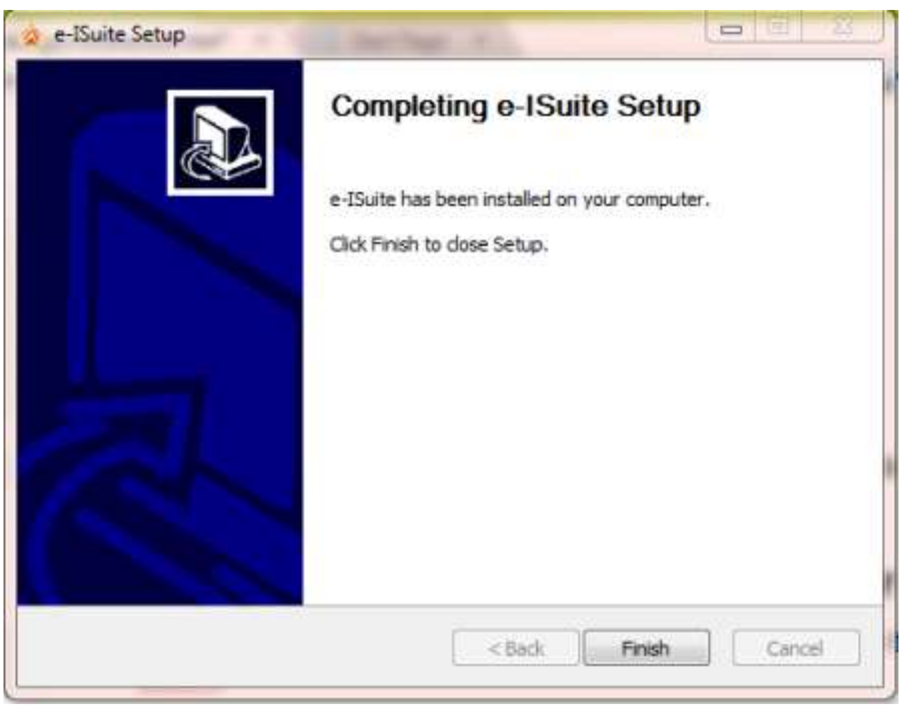
1. Go to the e-ISuite webpage (http://famit.nwcg.gov/applications/eISuite).
2. Click on the link for the e-ISuite Site download.
3. Download the Site database.
4. Save the file to the desktop.
5. When the download is complete, double click on the file on the desktop to begin the installation process.
6. Click the **Install** button.



7. When the installation is complete, click the **Next** button.



8. Click the **Finish** button when the message displays indicating that e-ISuite has been installed on the computer.



Site Account Manager Set up

1. Double click on the e-ISuite Site icon on the desktop, or enter the web address for e-ISuite Site (received from the ITSS).
2. Accept the warning that displays. When the warning is accepted, a **Create Account Manager User** page displays.
3. Enter a name for the new database that will be created in the **Database Name** box.
4. Enter a password for the new database in the **Database Password** field.
5. Confirm the Database Password.
6. Enter the **User Name** for the account.

NOTE: The system will auto-populate "ad." at the beginning of the user name. The Account Manager account being created must contain the ad. prefix.

7. Enter the **First Name** for the user account.
8. Enter the **Last Name** for the user account.
9. Select the **Unit ID** for the user account.
10. Enter a **Password** for the user account.

NOTE: Passwords must be 12 or more characters in length and must include at least one alpha, one numeric and one special character. Passwords cannot be a dictionary word and cannot match any of the previous 24 passwords that were used.

11. Enter the password a second time in the **Confirm Password** field.
12. Select the **Save** button.

NOTE: For additional information on managing a Site database, see *Manage Site Database* later in this document.

NOTE: For information on System Requirements, refer to *Getting Started*.


Create Account Manager User
Please create the initial database name, password, and the initial Site Account Manager user.
Database Name *
Database Password *
Confirm Database Password *
e-ISuite
Site
User Name *
ad.
First Name *
Last Name *
Unit ID *
Password *
Confirm Password *
Save

Adding Site User Accounts

Follow the steps in this section to add a user account to e-ISuite Site:

NOTE: After downloading and installing the Site version of e-ISuite, there is an initial log-in screen to create the first Account Manager User account. An assigned user/ITSS must initially log-in as the Account Manager to provide access to other users. This account has the privileged role of Account Manager which creates all other user accounts. These users can be imported from a file or added manually by the Account Manager.

NOTE: A User Account must be created for each user at an e-ISuite Site, even if that user already has a User Account in the e-ISuite Enterprise System. A User Account in an e-ISuite Site database is not associated with any User Accounts on the e-ISuite Enterprise System.

NOTE: Existing User Accounts can be imported from a file that was exported from another e-ISuite Site database. User Accounts cannot be exported from the e-ISuite Enterprise system for an e-ISuite Site System. See the details in the Import/Export User Accounts section.

1. To Manage User Accounts, login as a Privileged user. (Username must have the "ad.name" format). The user who is manually adding the User Accounts is assigned an Account Manager role in the e-ISuite Site database.

2. From the Home page click the **User Accounts** button.

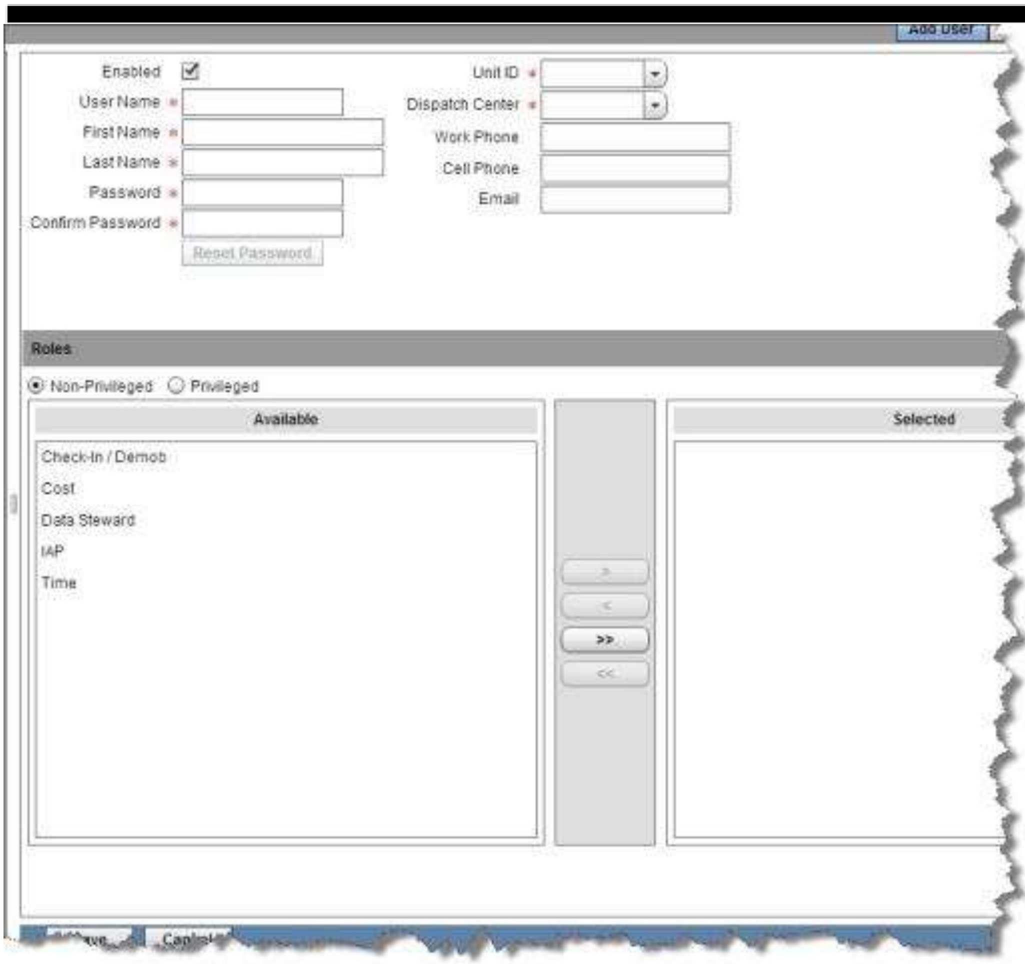
3. The Manage User Accounts page displays.

4. Click the **Add User** button.

5. Enter the user account information.

NOTE: In an e-ISuite Site database, a User Account can be generated from an Existing Resource by selecting the **+** button next to the Last Name field and selecting the existing user from the grid. The system auto-populates any other matching Data in the Add/Edit User Accounts panel.

6. Check the "**Enabled**" checkbox.
7. Enter the **User Name** (Privileged user accounts must include the "ad.name" format).
8. Enter the **First Name**.
9. Enter the **Last Name**.
10. Enter a **Password**.
11. Enter the password a second time to confirm that the password was entered correctly.
12. Select a **Unit ID** from the drop-down menu.
13. Select a **Dispatch Center** from the drop-down menu.
14. Enter a **Work Phone**.
15. Enter a **Cell Phone**.
16. Enter an **Email address**.
17. Select either the Privileged or Non-Privileged radio button, depending on the type of user account being created.
18. Select one or more roles to assign to the user account from the **Available** list, and click the **>** button to assign the role(s) to the user account by moving them to the **Selected** list. Only roles available to a privileged user will display for a privileged user account; only roles available to a non-privileged user will display for a non-privileged user account.



NOTE: Click the >> button to assign all roles to the user account.

NOTE: The **Data Steward** role must be assigned to at least one user to add/edit additional incidents, conduct ROSS Imports, Financial Exports and transfer data to Enterprise.

19. Click **Save** to add the record.

NOTE: All e-ISuite Site users have access to incident(s) listed in the grid on the Incidents screen.

Editing User Accounts in e-ISuite Site

Follow the steps in this section to edit a user account in the e-ISuite Site database:

1. Login using a privileged user account (the username begins with ad.).
2. On the Home page, click the **User Accounts** button.

3. The **Manage User Accounts** screen displays.
4. From the User Accounts grid, select a user to edit. The user information will automatically populate.

NOTE: To expand the User Accounts grid, click the **Expand/Collapse Grid** button. If the grid is expanded, select a row and click the **Edit User** button to Edit User Data.

5. Make the appropriate changes to the User data. The following data can be edited for a user account in Site:
    a. The account can be Enabled or Disabled
    b. User Name
    c. First Name
    d. Last Name
    e. Unit ID
    f. Dispatch Center
    g. Work Phone
    h. Cell Phone
    i. Email address
6. Click **Save** to update the record.

NOTE: A user account cannot be changed from Non-Privileged to Privileged and vice versa.

Deleting User Accounts

Follow the steps in this section to delete a user account from e-ISuite Site:

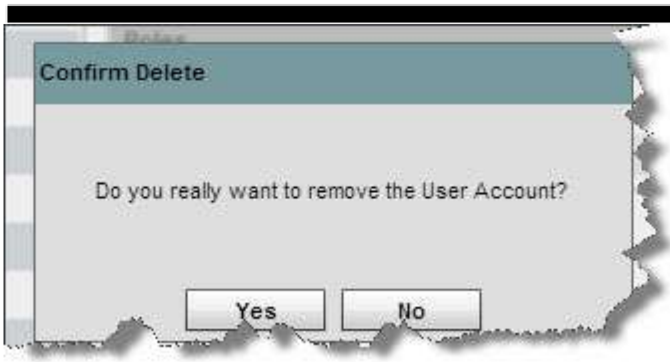
NOTE: A User Account which has been used to log in to the system cannot be deleted it can only be disabled. Only User Accounts with which the user has not logged into the system can be deleted.

1. Login using a privileged user account (the username begins with ad.).
2. From the Home page click the **User Accounts** button.

3. The **Manage User Accounts** screen displays.
4. Select a User Account.
5. Click the **Delete User** button.

NOTE: Only one User Account can be deleted at a time.

6. A message will display asking the user to confirm deletion. Click **Yes** to delete and remove the selected User Account.



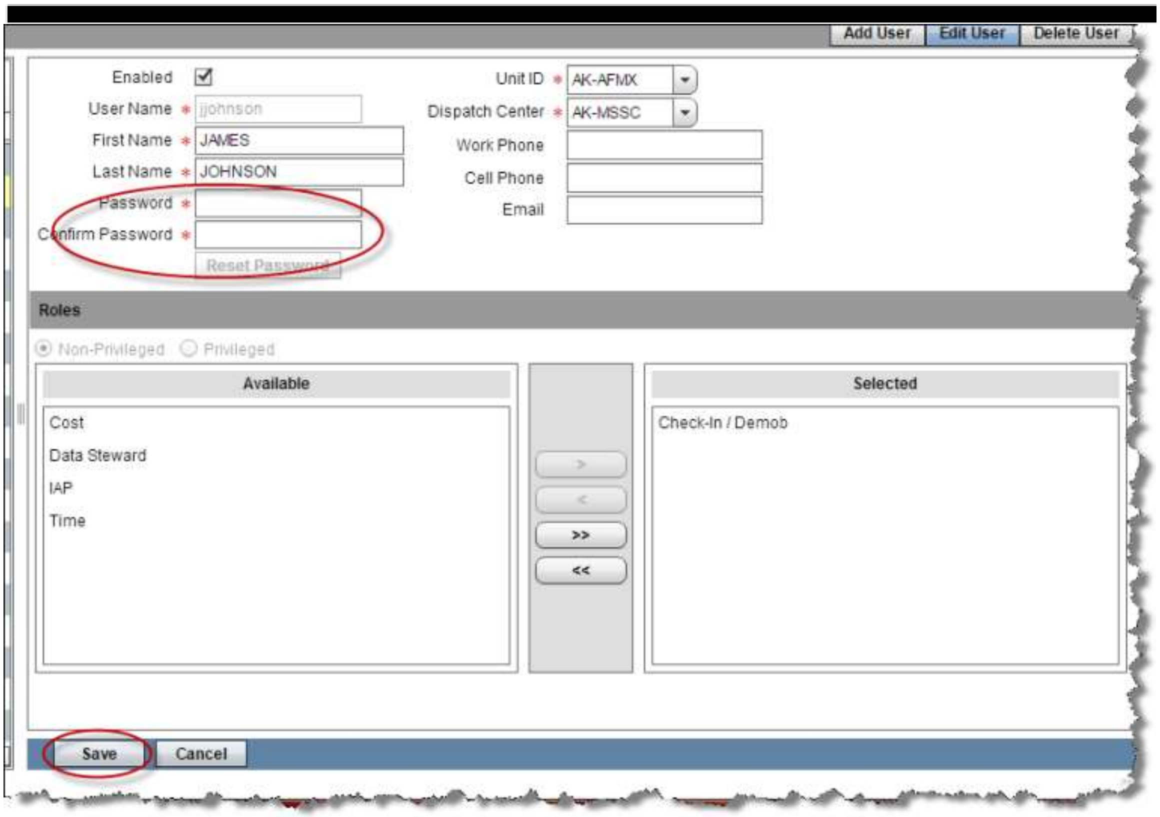
NOTE: When a User Account is deleted in e-ISuite Site it is completely removed from the database and is no longer accessible by any user or system.

Account Manager Re-set Password in Site

If a user has forgotten their password, it must be re-set by an Account Manager.

1. Log in with a privileged user account (the user name begins with ad.).
2. Select the **User Accounts** button on the Home Page.
3. Highlight the user account for which the password is being re-set.
4. Select **Reset Password** under the User Name and Password fields.

5. Enter a new password.
6. Enter the password a second time in the **Confirm Password** field.
7. Click the **Save** button to save the password change.
8. The user will be required to change this password during the first log-in to Site.


Add User
Edit User
Delete User
Enabled
User Name
jjohnson
First Name
JAMES
Last Name
JOHNSON
Password
Confirm Password
Reset Password
Unit ID
AK-AFMX
Dispatch Center
AK-MSSC
Work Phone
Cell Phone
Email
Roles
Non-Privileged
Privileged
Available
Cost
Data Steward
IAP
Time
Selected
Check-In / Demob
Save
Cancel

Enable or Disable User Accounts

Follow the steps in this section to Enable or Disable a user account in e-ISuite Enterprise or Site:

1. Login using a privileged user account (the username begins with ad.).

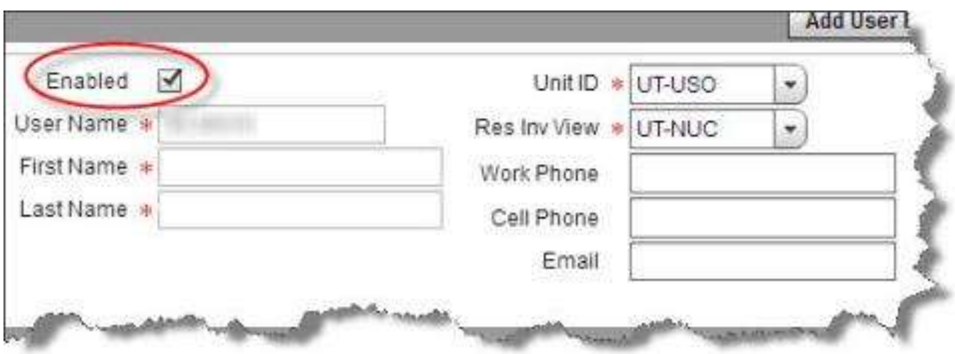
2. From the Home page, click the **User Accounts** button to display the **User Accounts** page.

3. From the User Accounts grid, select a user to Enable/Disable. The user information will automatically populate.

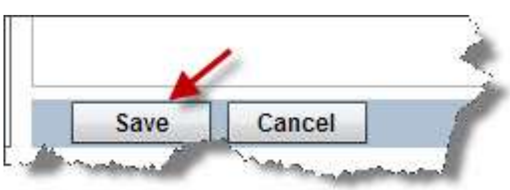
NOTE: To expand the User Accounts grid, click the Expand/Collapse Grid button.

4. To Enable a user check the **Enabled** checkbox.

5. To Disable a user un-check the **Enabled** checkbox.



6. Click **Save** to save changes.

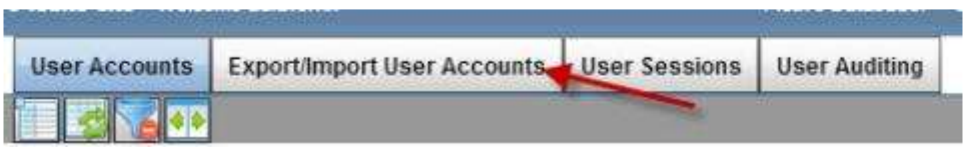


Export User Accounts in e-ISuite Site

Follow the steps in this section to Export a user account in the e-ISuite Site database:

1. Login using a privileged user account (the username begins with ad.).
2. From the Home page, select the **User Accounts** button.

3. The Manage User Accounts screen displays.
4. Click the **Export/Import User Accounts** button.



5. Select the **Export Users** tab.

6. To exclude user accounts from the export, select the user in the grid and click the **Exclude User** button.

NOTE: All User Accounts will be exported unless the Account Manager excludes a user account.

7. To remove the exclusion of a user account, select the user in the grid and click the **Include User** button.

8. Click the **Export Users** button to export the user accounts.

9. A message displays confirming the export of the selected user accounts, select **Yes** or **No**.

10. A new window will display asking where the Export File should be saved.

11. Navigate to the folder on the local computer where the exported file should be saved.

12. Click **Save** to save the exported file.

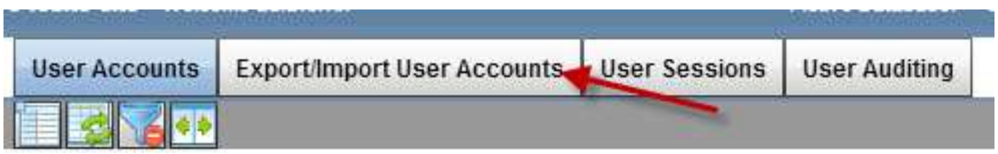
NOTE: The exported file can now be transferred to a portable media device which can be used to import User Account data into another e-ISuite Site database.

Import User Accounts in e-ISuite Site

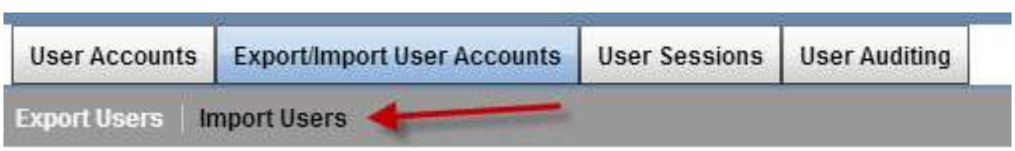
Follow the steps in this section to Import a user account file to an e-ISuite Site database:

1. Login using a privileged user account (the username begins with ad.).
2. From the Home page, select the **User Accounts** button.

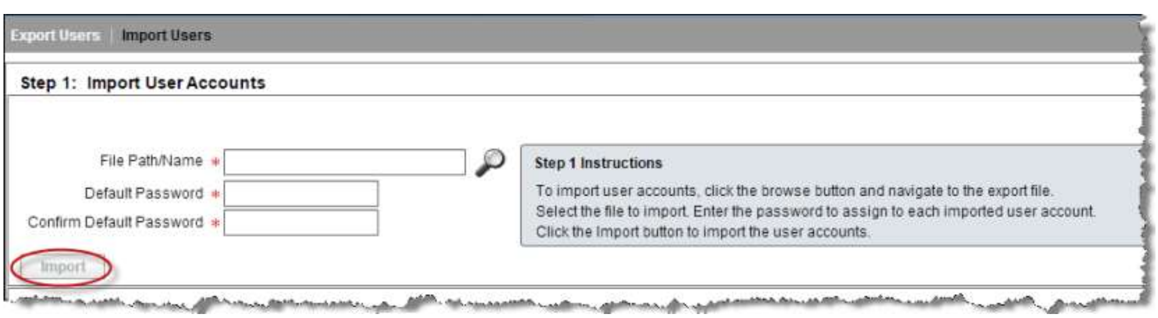
3. The Manage User Accounts screen displays.
4. Click the **Export/Import User Accounts** button.



5. Select the **Import Users** tab.



6. Click the browse icon next to **File Path/Name** and select the file to be imported.



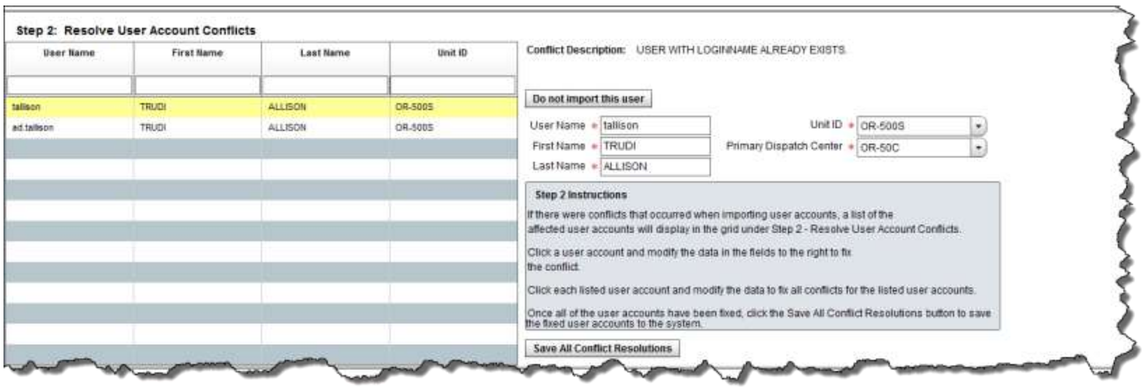
7. Enter the **Default Password**.

8. Confirm the **Default Password**.

NOTE: The Default Password will be assigned to all User Accounts that are being imported. When a user logs into the system, the user will have to change this password.

9. Click **Import**.

10. If there were conflicts that occurred during the import process, a list of the affected user accounts will display in the grid under **Step 2: Resolve User Accounts Conflicts**.



11. Click a user account and modify the data in the fields to the right of the grid.

12. Click each listed user account and modify the data to fix all conflicts.

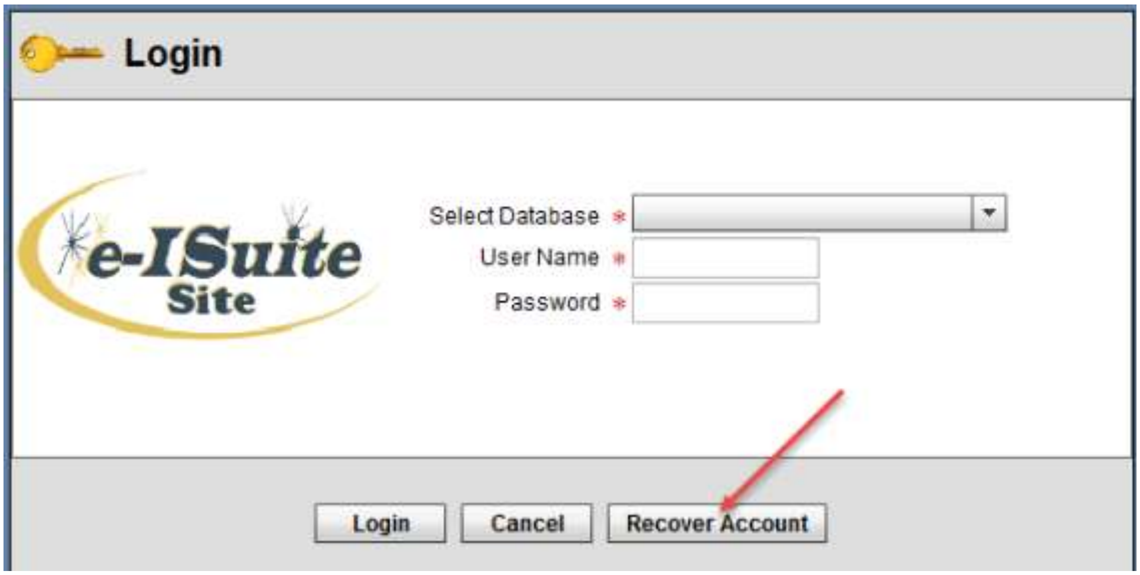
13. Once all of the conflicts have been fixed, click the **Save All Conflict Resolutions** button.

Recover/Create New Account Manager Account in e-ISuite Site

Follow the steps in this section to generate an Encrypted Code to send to the Help Desk to create a new Account Manager Account for an e-ISuite Site database.

Generate an Encrypted Code

1. On the Login page, click the **Recover Account** button.

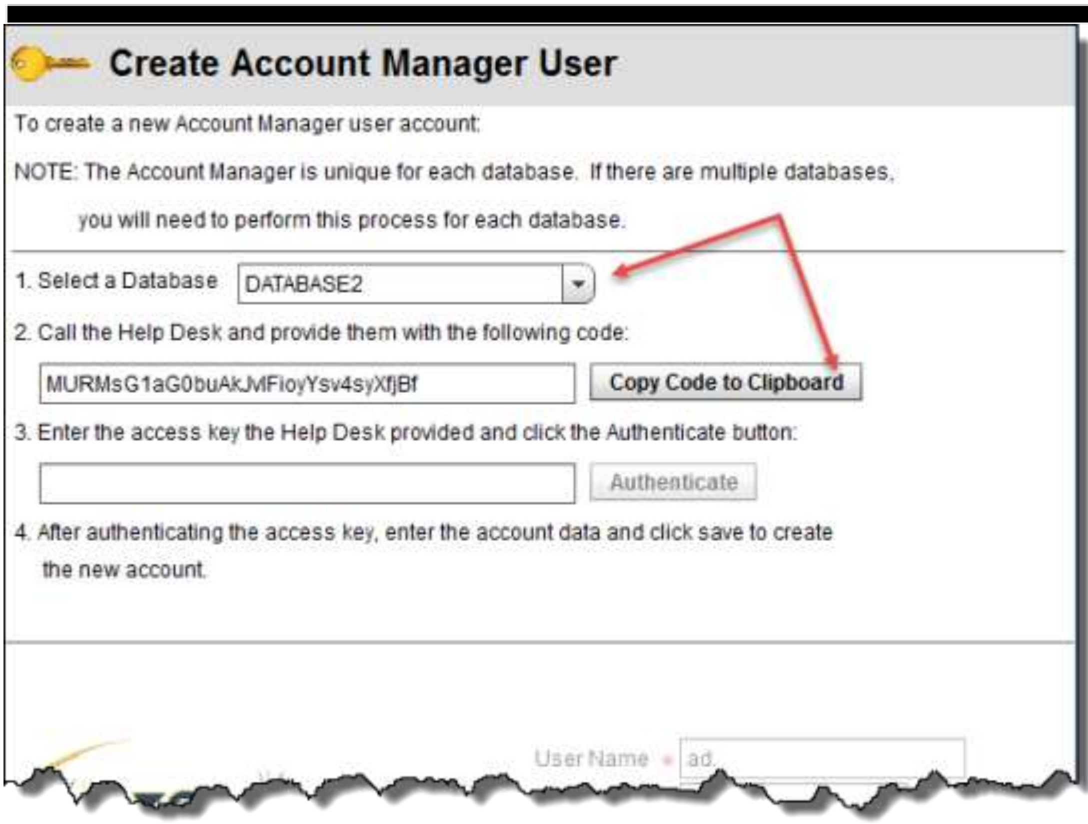


2. If there are multiple databases on the Site server, select the appropriate database.

3. The system automatically generates an encrypted Site access code for the database.

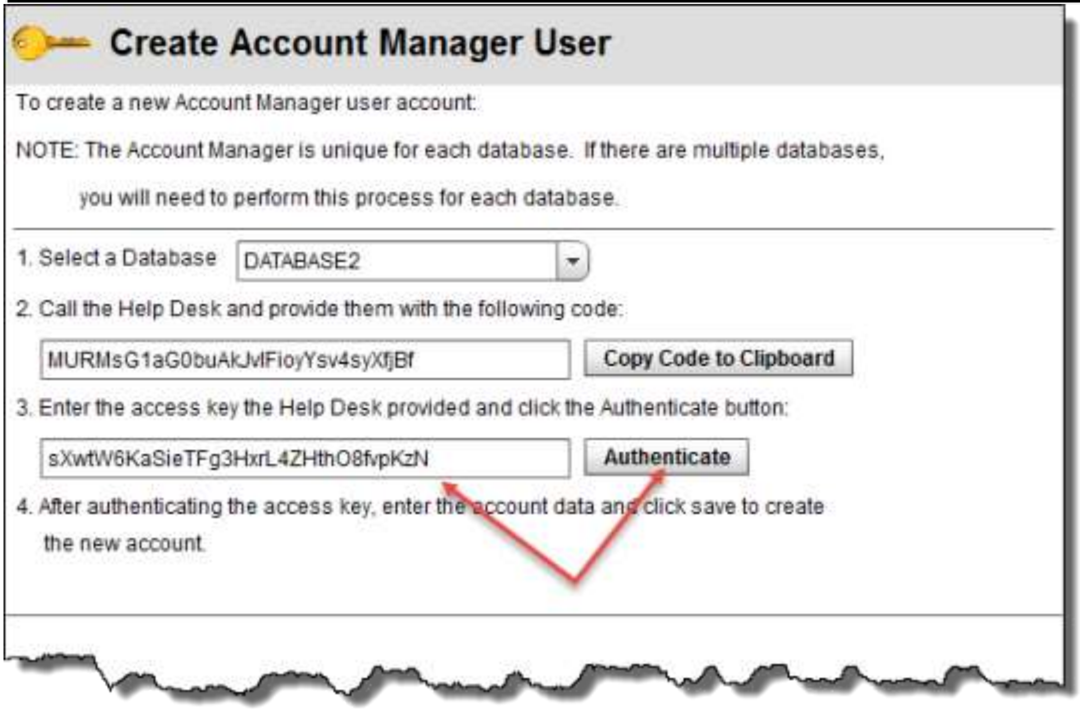
4. Click **Copy Code to Clipboard** button.

5. Send the copied code to the Help Desk. The Help Desk will reply with an Access Key.



Create New Account Manager Account

1. On the Login page, click the **Recover Account** button.
2. If there are multiple databases on the server, select the appropriate database.
3. Enter or paste the Access Key into the **Access Key** field. This Access Key Code will be obtained from the Help Desk.
4. Select the **Authenticate** button.



5. The system authenticates the Access Key.

6. Once the Access Key is authenticated, the system enables the Account Manager's fields.

7. Enter a unique **User Name**.

8. Enter a **First Name**.

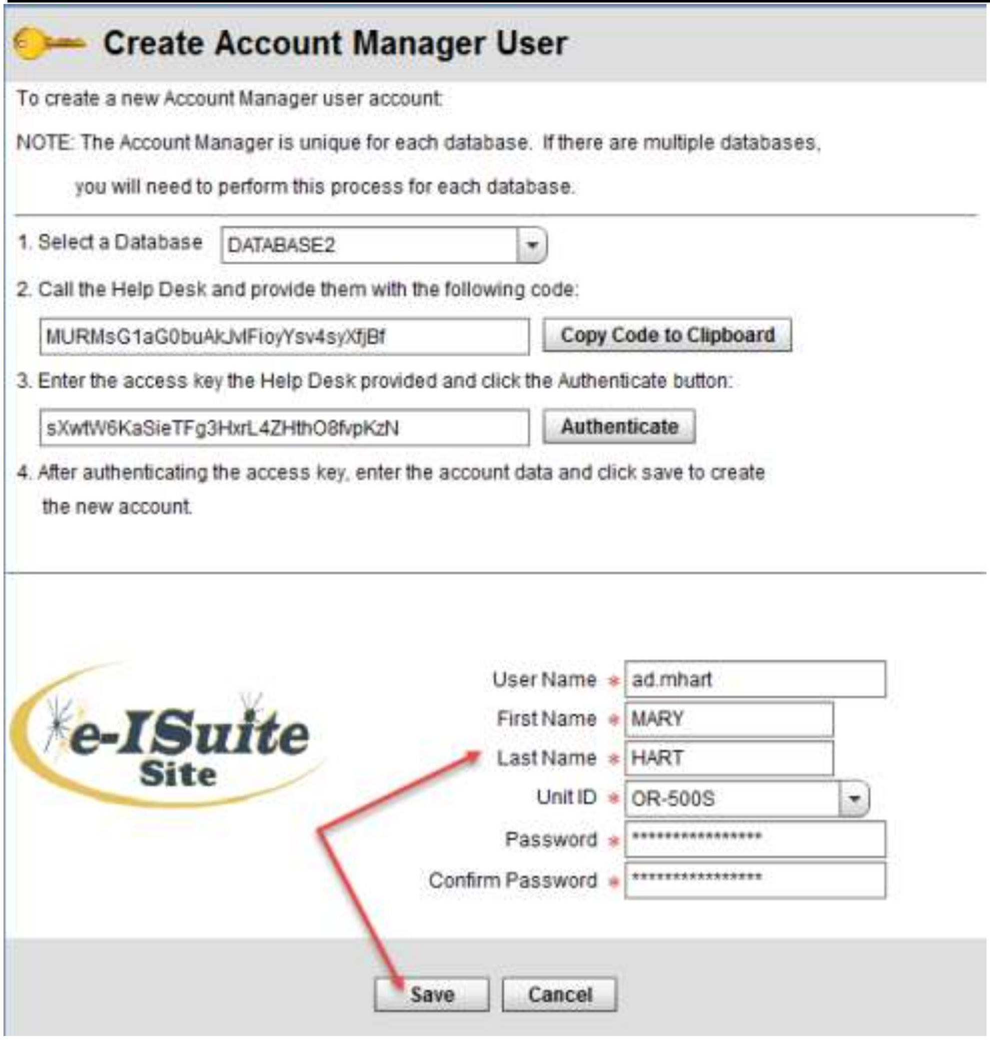
9. Enter a **Last Name**.

10. Enter a **Unit ID**.

11. Enter a **Password**.

12. Enter the password a second time to **Confirm Password**.

13. Click on the **Save** button.


Create Account Manager User
To create a new Account Manager user account:
NOTE: The Account Manager is unique for each database. If there are multiple databases,
you will need to perform this process for each database.
1. Select a Database
DATABASE2
2. Call the Help Desk and provide them with the following code:
MURMsG1aG0buAkJvMFioyYsv4syXfjBf
Copy Code to Clipboard
3. Enter the access key the Help Desk provided and click the Authenticate button:
sXwtW6KaSieTFg3HxrL4ZHthO8fvpKzN
Authenticate
4. After authenticating the access key, enter the account data and click save to create
the new account.
e-ISuite
Site
User Name
ad.mhart
First Name
MARY
Last Name
HART
Unit ID
OR-500S
Password
Confirm Password
Save
Cancel

User Sessions Overview

Only one session per user is allowed at any one time. This section explains how to disconnect a user session that becomes locked for some reason.

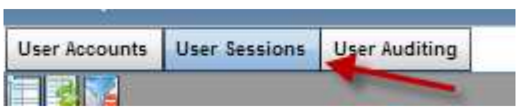
- Disconnecting User Sessions

Disconnect User Sessions

If a user session locks up or the user is unable to log in due to an aborted session, follow the steps to disconnect the user.

1. From the Home page, click the **User Accounts** button.

2. Select the **User Sessions** tab.



3. From the User Accounts grid, select the user session to disconnect.

4. Click **Disconnect User** to disconnect the selected user.

NOTE: Account Managers cannot disconnect their own session from the Disconnect Session screen. In order to disconnect their own account, they must attempt to log into the system a second time and answer **Yes** when asked whether to disconnect their previous session.

User Auditing - Site

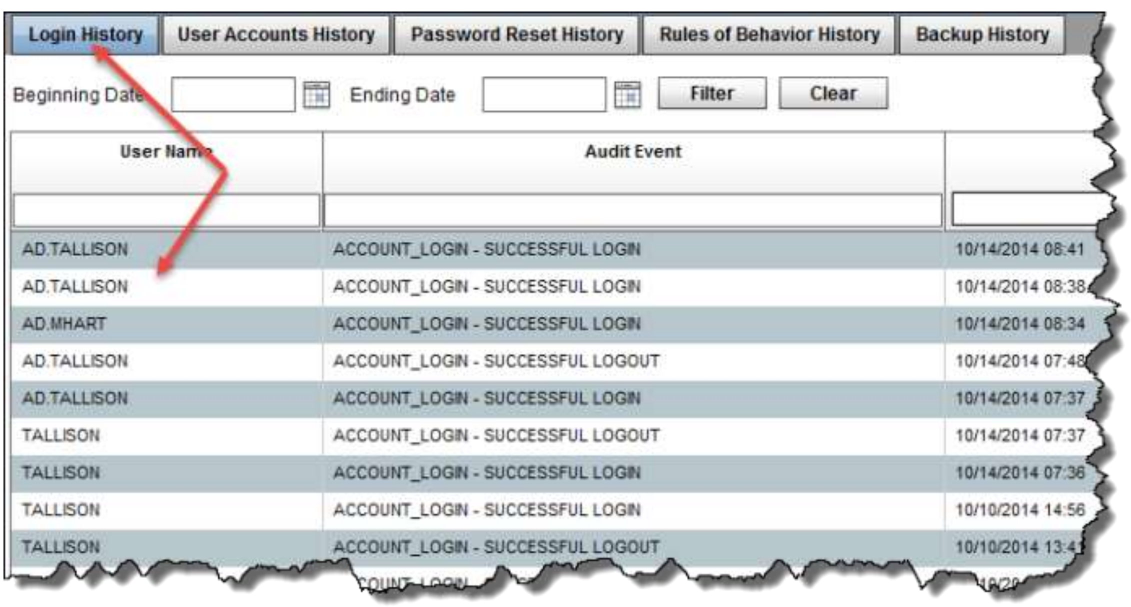
Follow the steps in this section to manage auditing data in the e-ISuite Site System:

1. Log in to Site using a privileged user account (the name begins with ad.).

2. From the Home page, select the **User Accounts** button.

3. Select the **User Auditing** button.

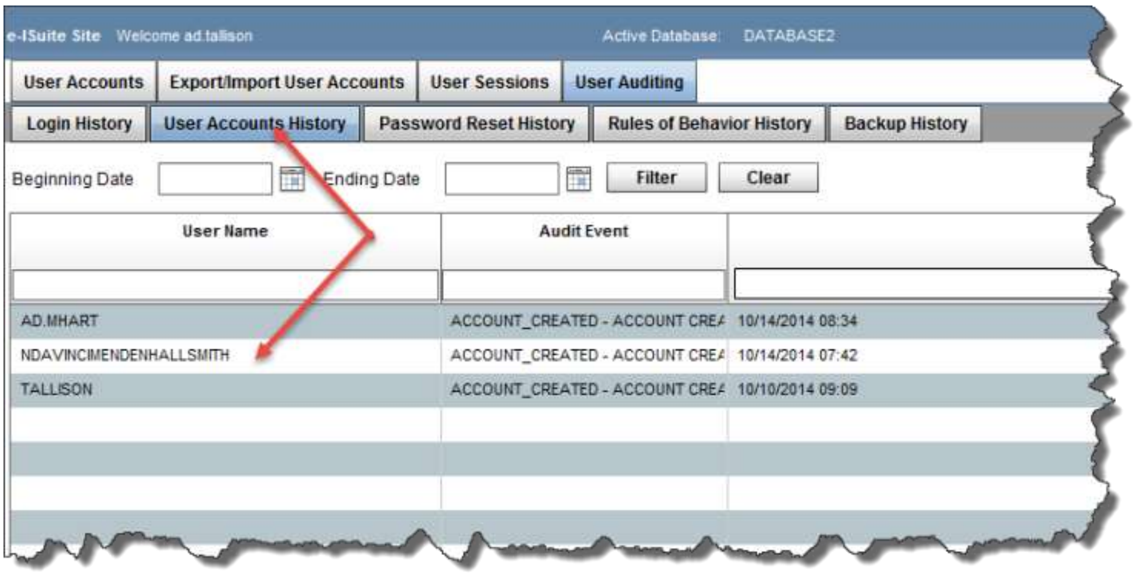
4. Select the **Login History** tab to view the login history for the system.



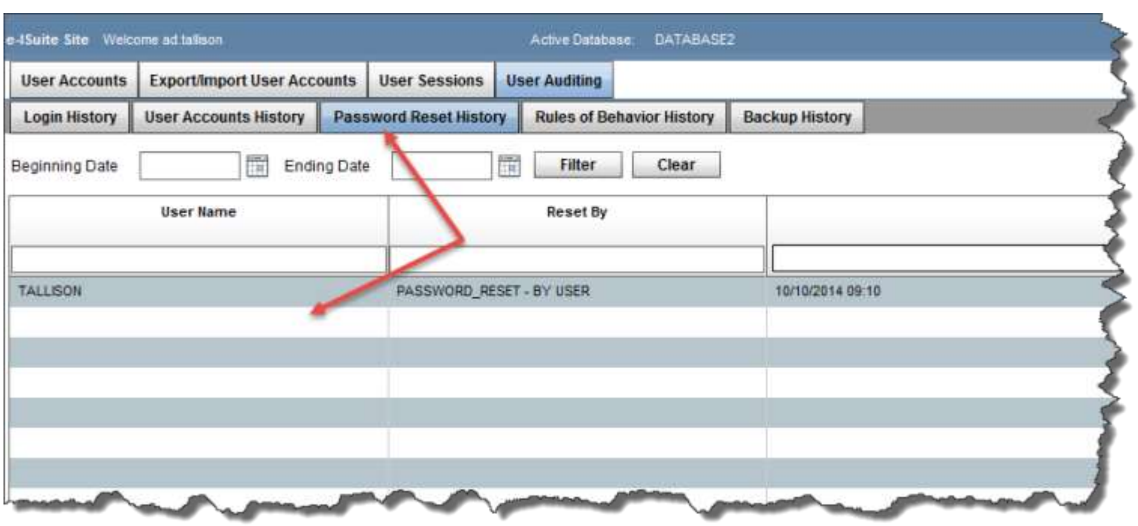
5. If desired, enter a date range in the **Beginning Date** and **Ending Date** fields to identify the history to include in the grid.

NOTE: A user can also filter the columns in the grid by entering a search term into the filter above the column.

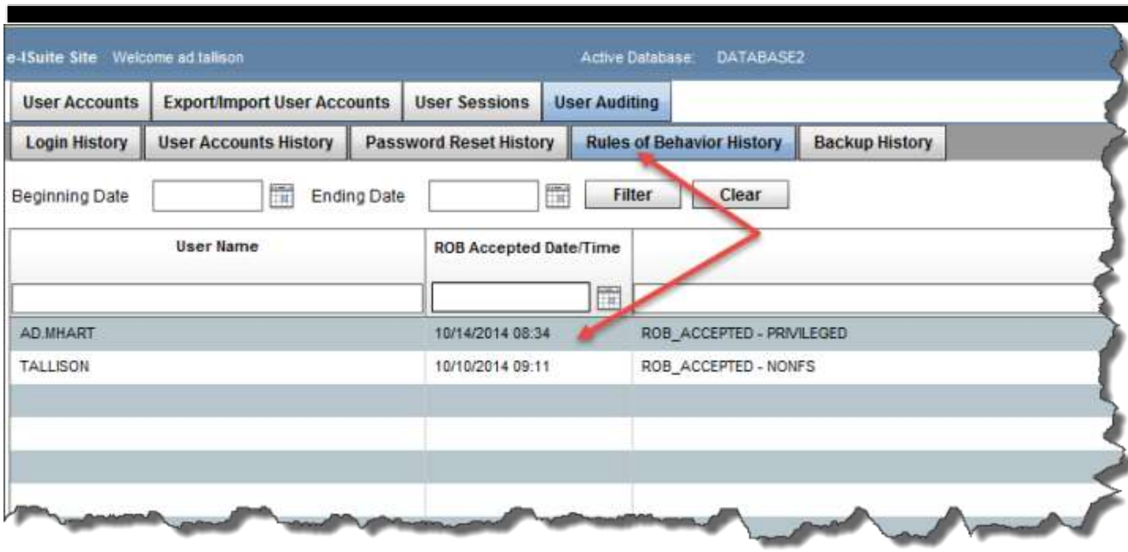
6. Select the **User Accounts History** tab to view a history of e-ISuite changes made to user accounts (e.g., User Account Created, Roles Added/Removed, Enabled/Disabled state).



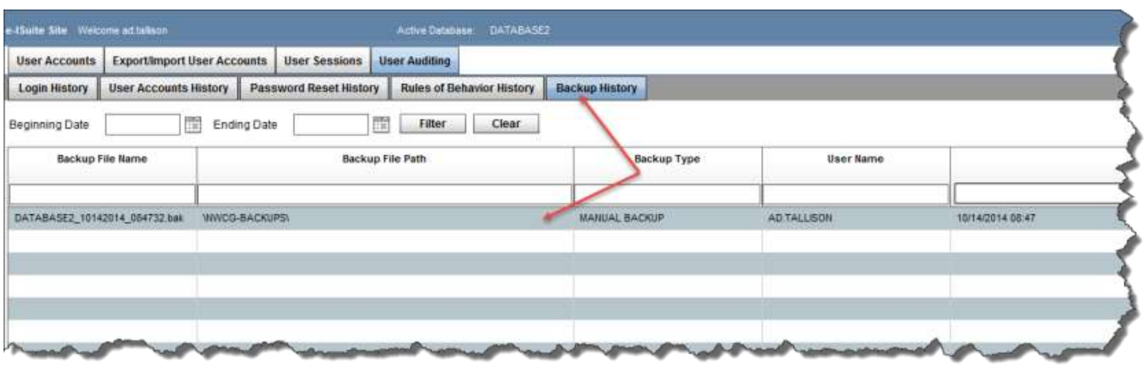
7. Select the **Password Reset History** tab to view the Password Reset history for the system.



8. Select the **Rules of Behavior History** tab to view a history of Rules of Behavior Acceptance for the system.



9. Select the **Backup History** tab to view a history of Backup's for the system.



User Auditing - Enterprise

Follow the steps in this section to manage auditing data in e-ISuite Enterprise:

1. Log in using a privileged user account (the name begins with ad.).
2. From the Home page, select the **User Accounts** button.
3. On the User Accounts screen, select the **User Auditing** tab.
4. If desired, enter a date range in the **Beginning Date** and **Ending Date** fields to identify the history to include in the grid.

NOTE: A user can also filter the columns in the grid by entering a search term into the filter above the column.

Manage Site Database

This section contains information about managing e-ISuite Site databases.

Create a New Database
Copy a Database
Edit a Database
Manually Backup a Database
Restore a Database
Remove a Database
Recover a Database Password

Create a New Database

NOTE: A Site server must already exist on which the e-ISuite System has been installed. When the user initially installs the e-ISuite systems on a Site server, the system will require the user to provide a name for the initial e-ISuite database. The user will also be required to setup a master database password. The database password must follow the same password rules that apply to user accounts.

NOTE: The new database will be saved to a pre-existing path on the site server. The new database will automatically include all reference data, database objects and structures that are included in default databases. User account information is automatically added for the user who created the new database, to this new database.

1. Login as an Account Manager.
2. On the Home page select the **Database Management** option.

3. Select the **Create New DB** button.
4. Enter a **Database Name**.

5. Enter a **Database Password**.

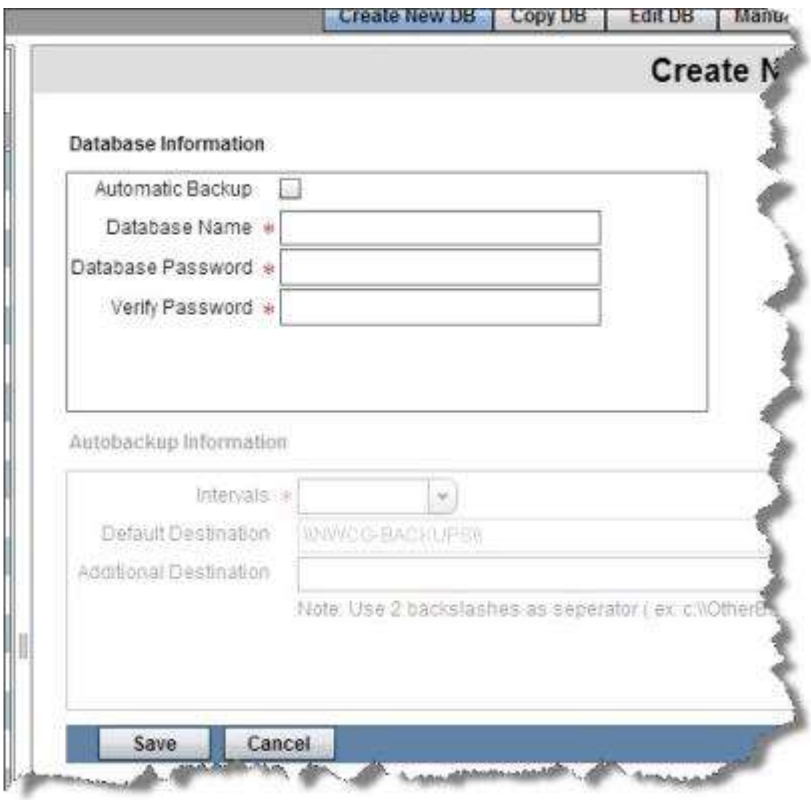
6. Enter the password a second time to verify the password for the new database.

7. Check the **Automatic Backup** checkbox to run automatic backups of the database if desired.

    a. Select the **Intervals** for the automatic backup from the drop down menu.

    b. Enter an Additional Destination for the backup file if desired.

8. Click **Save** to save the new database.

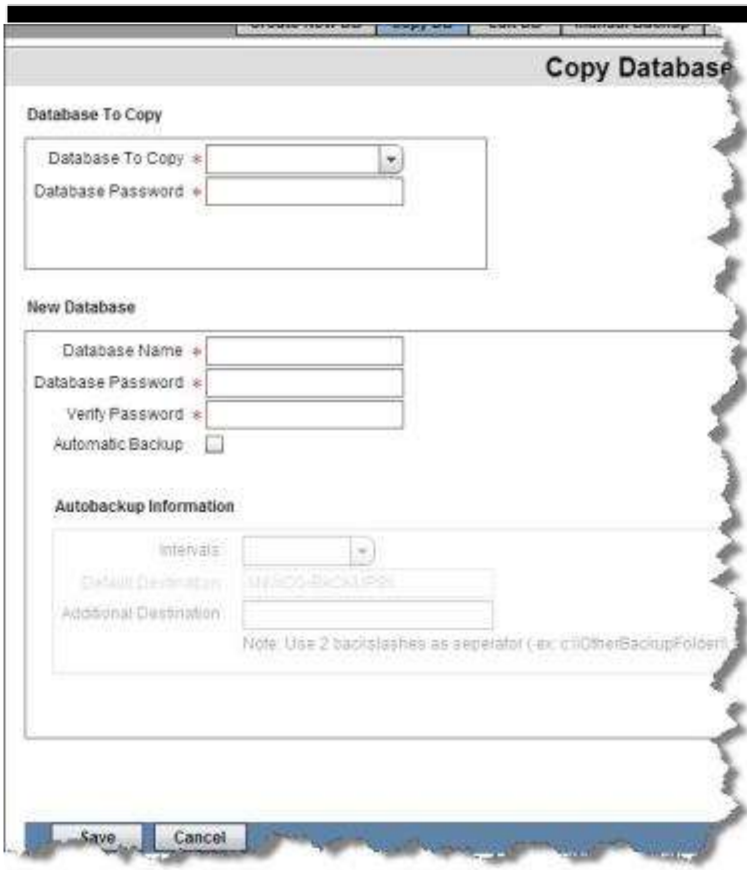


Copy a Database

1. From the Home page, select the **Database Management** option.

2. Select the **Copy DB** button.
3. Select the **Database to Copy** from the drop down menu.
4. Enter the **Database Password** for the database being copied.
5. Enter the new **Database Name**.
6. Enter the new **Database Password**.
7. Enter the password a second time to verify the password for the new database.
8. Check the **Automatic Backup** checkbox to run automatic backups of the database if desired.
    a. Select the Intervals for the automatic backup from the drop-down menu.
    b. Enter an Additional Destination for the backup file if desired.
9. Click **Save** to save new database.

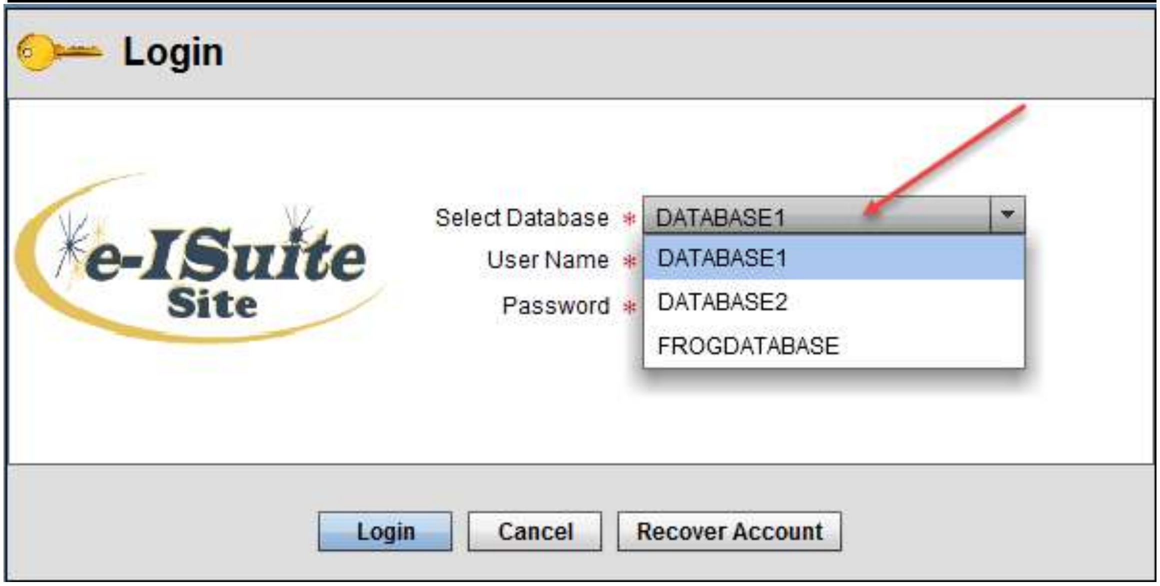
NOTE: The user must log out of the currently selected database and log back into the new database in order for that database to become the active database.



Changing from One Database to another Database

There can be multiple databases in Site, however, a user can only log into one database at a time. The user must log out of a current database and select another database from the drop down menu on the log in screen. Remember to Save any data entries in the current database prior to logging out.

1. Click on the **Log Out** button in the upper right hand corner.
2. Click **Accept** to accept the warning message.
3. On the Login page select the database to log in to.
4. Enter a valid Username and Password.
5. Click the **Login** button to login to the selected database.

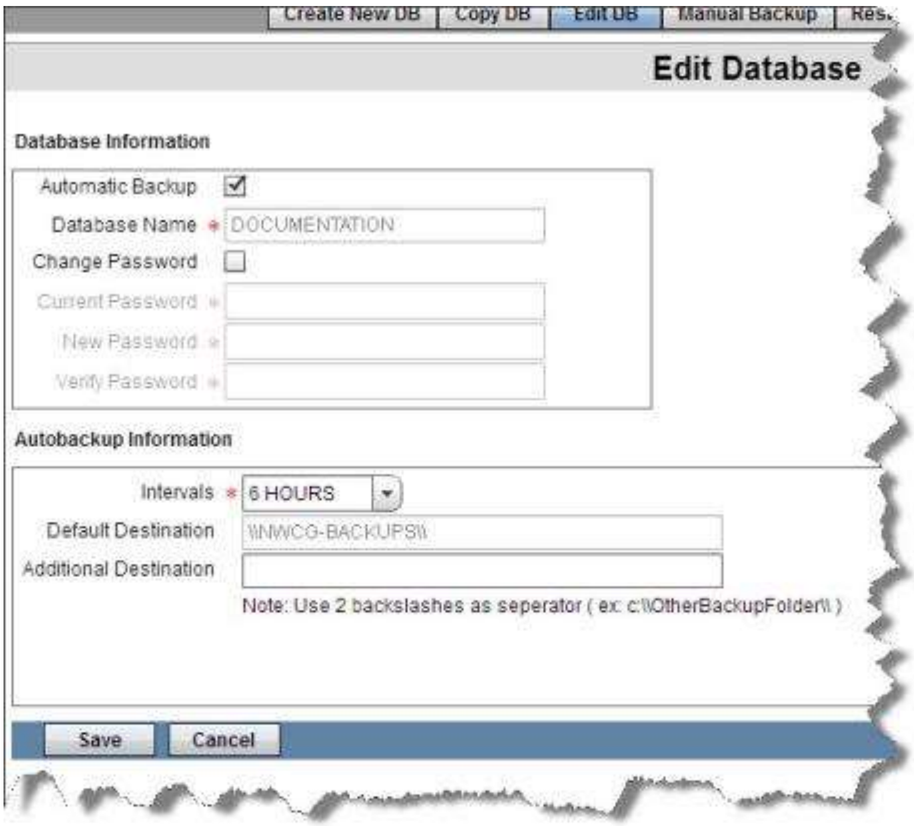


Editing a Database

1. Log into the system as an Account Manager.
2. From the Home page select the **Database Management** button.

3. Select an existing database in the list of databases.
4. Click the **Edit DB** button.
5. The **Database Name** can be changed if desired.
6. Change the **Database Password** with the following steps:
    a. Click the **Change Password** checkbox.
    b. Enter the **Current Password**.
    c. Enter the **New Password**.
    d. Enter the **Verify Password.**

7. The **Automatic Backup** setting can be changed if desired.
    a. Change the **Intervals**.
    b. Change the **Additional Destination.**
8. Click **Save** to save any changes to the database.



Manually Backup a Site Database

1. On the Home page, select the **Database Management** option.

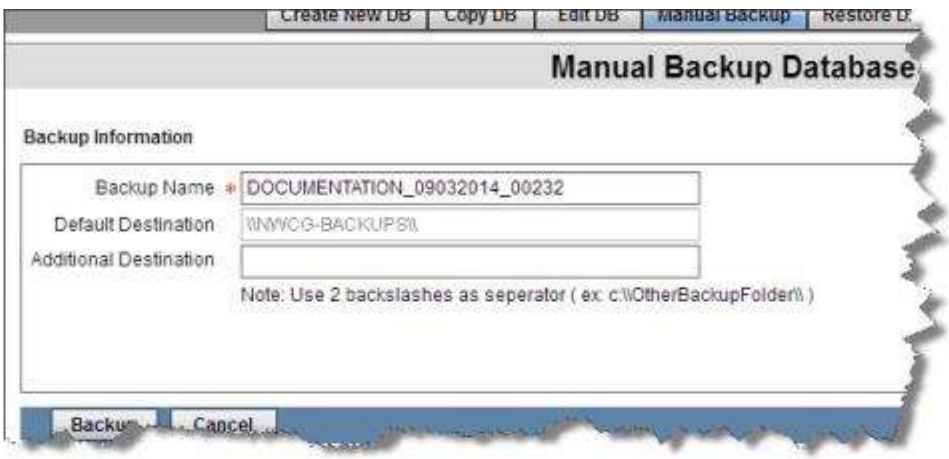
2. Select the **Manual Backup** option.
3. Change the **Backup Name** for the file.

4. Enter an **Additional Destination** for the backup file, if desired.

NOTE: The Additional Destination is an additional area in which the file will be saved. The system will also save a copy of the backup file in a system designated folder on the Site server or an external hard drive or a portable media device (e.g., flash drive).

5. Click the **Backup** button to backup the database.

NOTE: Only the data that was saved prior to the backup process initiation will be included in the backup file. Any data that is saved during the backup process will not be saved to the backup file.



Automatically Backup a Site Database

NOTE: The purpose of backing up an e-ISuite Site Database is to keep a local, backup copy of the database on site. Backing up an e-ISuite Site Database does not replace transferring data from an e-ISuite Site to the e-ISuite Enterprise System.

Database Setup during Installation of system:

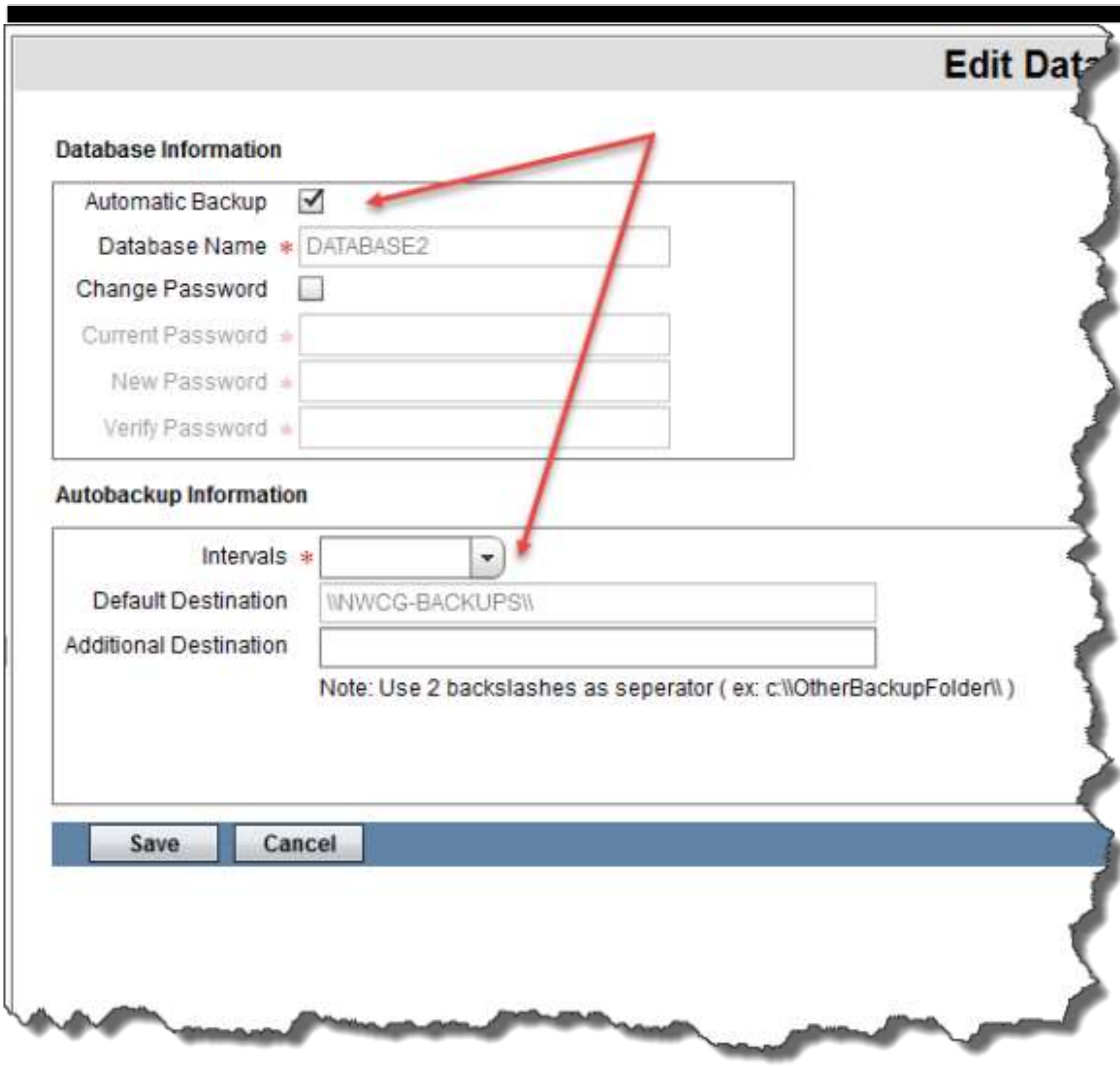
1. Check the **Automatic Backup** checkbox if desired.
2. Select the **Intervals** for the backup.
3. Enter an **Additional Destination** for the backup file if desired.

NOTE: This is the second area in which the file will be saved. The system will also save a copy of the backup file in a system designated folder on the Site server.

Creating a new database:

1. Log into the system as an Account Manager.
2. Select the **Database Management** option.

3. Select either the **Create New DB**, **Copy DB** or **Edit DB** options.
4. Check the **Automatic Backup** checkbox.
5. Select the **Intervals** for the backup.
6. Enter an **Additional Destination** for the backup file, if desired.



Editing the backup type for the currently selected database:

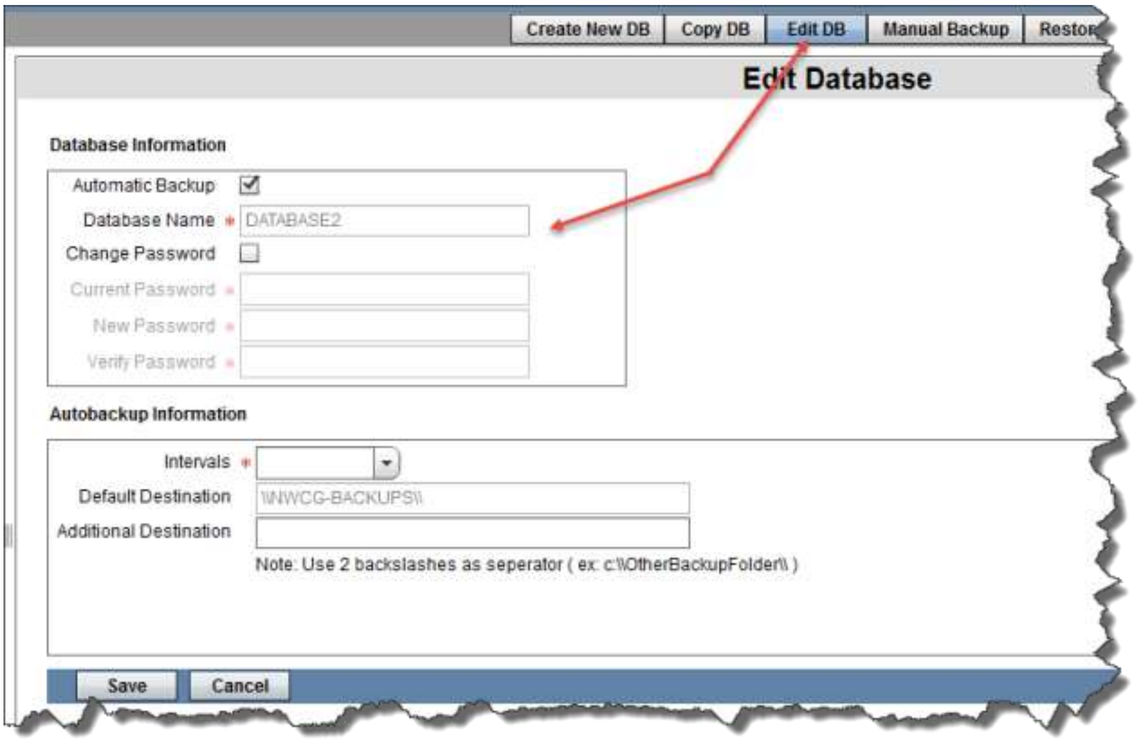
1. Log into the system as an Account Manager.
2. Select the **Database Management** option.

3. Select an existing database and the **Edit DB** button.

4. Check the **Automatic Backup** checkbox.

5. Select the **Intervals** for the backup.

6. Select the **Additional Destination** for the backup, if desired.



Restore a Site Database Backup File

NOTE: When the user restores an e-ISuite Site database, all data in the current database is overwritten with the backup data. A backup copy of the current database must be made prior to restoring a backup database.

1. On the Home page, select the **Database Management** button.

2. On the Database Management screen, select the **Restore DB** button.

3. In the **Restore From** field select the browse button and navigate to the folder where the Backup Database file is located.

4. Select the appropriate Backup Database file.

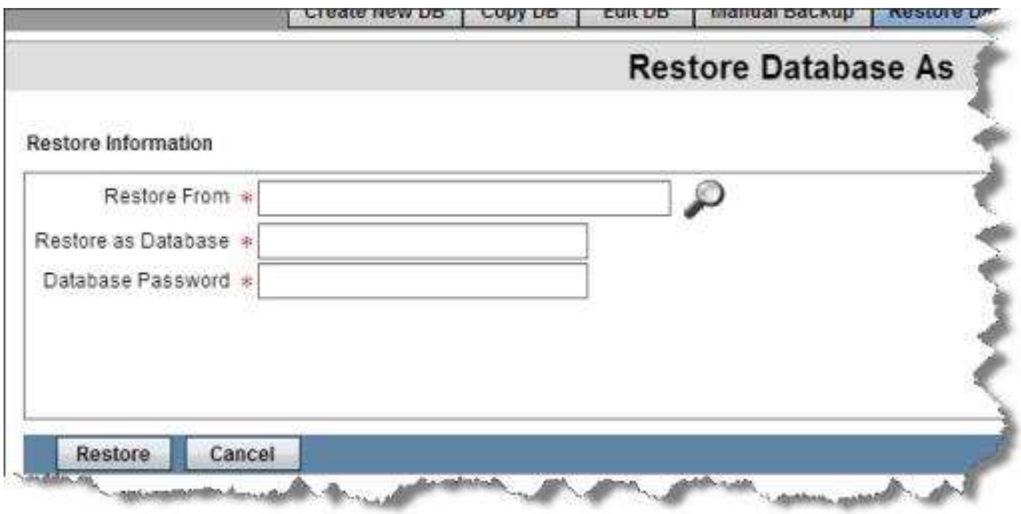
5. Enter the name to assign to the restored file in the **Restore as Database** field.

6. Enter the **Database Password**.

7. Click the **Restore** button to restore the database.

8. The system makes a backup copy of the current database.

9. The system renames the restored database.



Remove Database

NOTE: When the user removes an e-ISuite Site database, all data in the database is removed from the site system. A backup copy of the current database must be made prior to restoring a backup database.

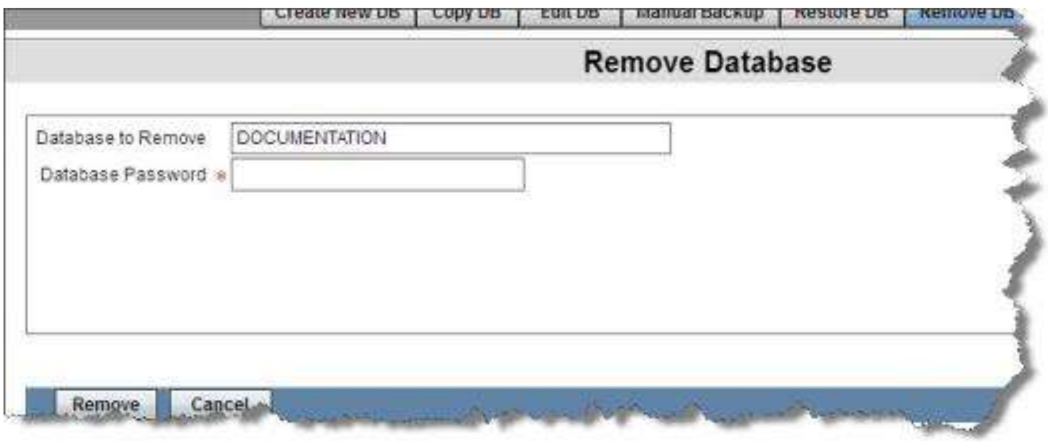
1. On the Home page, select the **Database Management** button.

2. On the Database Management screen, select the existing database to be removed.

3. Click the **Remove DB** button.

4. Enter the **Database Password** for the database to be removed.

5. Click the **Remove** button.



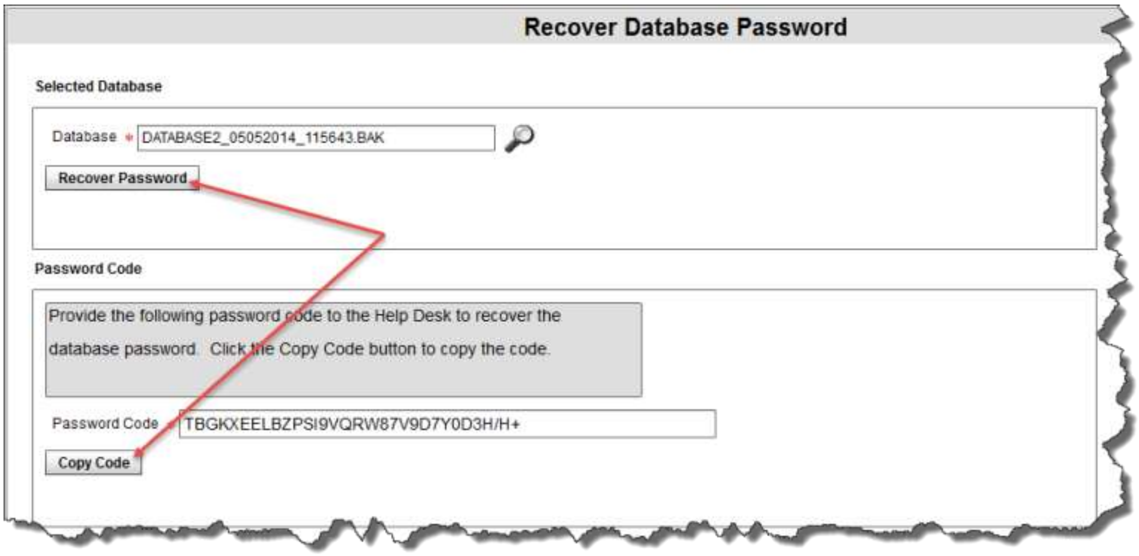
Recover Database Password

1. On the Home page, select the **Database Management** button.

2. On the Recover Database Password screen, select the browse button and navigate to the folder where the Backup Database file is located.

3. Click the **Recover Password** button.

4. The Password Code will display.
5. Click the **Copy Code** button.
6. Communicate the password code to the e-ISuite Help Desk for support. The Help Desk will send the password back to the Site Account Manager to recover the database.



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