

# Building the Administrators Toolbox

Taking Advantage of Permissions and Training

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**SUPPORTING**

**[DOING]**

**LEADING**

## Agenda

- Background
- Our Challenge
- Role-Based Training
- Developing User Administration Dashboard
- Future Development Plans

## Background

- 7,000 employees
- EarthSoft Products
  - 2015
- Infrastructure
  - On-premise
    - Development and Production
  - 20 databases
    - Regional
    - Client specific
  - 500 users



<https://www.worldatlas.com/articles/the-regions-of-the-united-states.html>



# Our Challenge



20 Databases + 500 Users + Inconsistent Permissions = Inefficiency



Increasing requests for individualized training

Time intensive = \$

Not scalable

Little ROI when you consider turnover

## Our Challenge

- We needed a more streamlined way to manage our users and meet the growing requests for training.
- Let's use permissions to help drive the development of our training material.
- Where do we start?



# Role-Based Training

What is role-based training?

- Training activities that are focused on teaching the skills to meet the needs of a specific role.

## Benefits



Improves problem solving skills



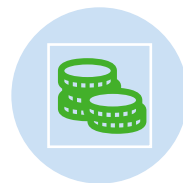
Improves engagement



Personalized, self-paced and user-managed



Anticipate and fill skill gaps



Cost effective

# Role Based Training - Redefining Roles and Permissions

- Existing roles
  - Aligning what's in our Environmental Data Management Plan (EDMP) to what is in our databases.
- Redefined roles
  - Roles are based on most common use types.
    - Data Submitter
    - Data User
    - Data Manager
    - Admin Lite
    - Administrator
    - Module Users
    - Facility Group Roles

<https://edm-1.itrcweb.org/>



**Environmental Data Management (EDM) Best Practices** HOME

## Welcome

### Environmental Data Management Best Practices

This Interstate Technology and Regulatory Council (ITRC) online documentation includes Fact Sheets, Subtopic Sheets, Checklists, Case Studies, Interactive Tools, and Supporting Documents prepared by the Environmental Data Management Best Practices (EDMBP) Team. Links within the online document help the reader locate interrelated topics. The web-based nature of this document lends itself to updating key information in this continually evolving subject.

## TRC Environmental Data Management Plan

June 11, 2023



## Role Based Training - Development Steps





## Role Based Training - Identify Scope of Role

- Redefined the roles.
- Identify the needed information to be successful in that role.
- Use scope to define the overall courses.

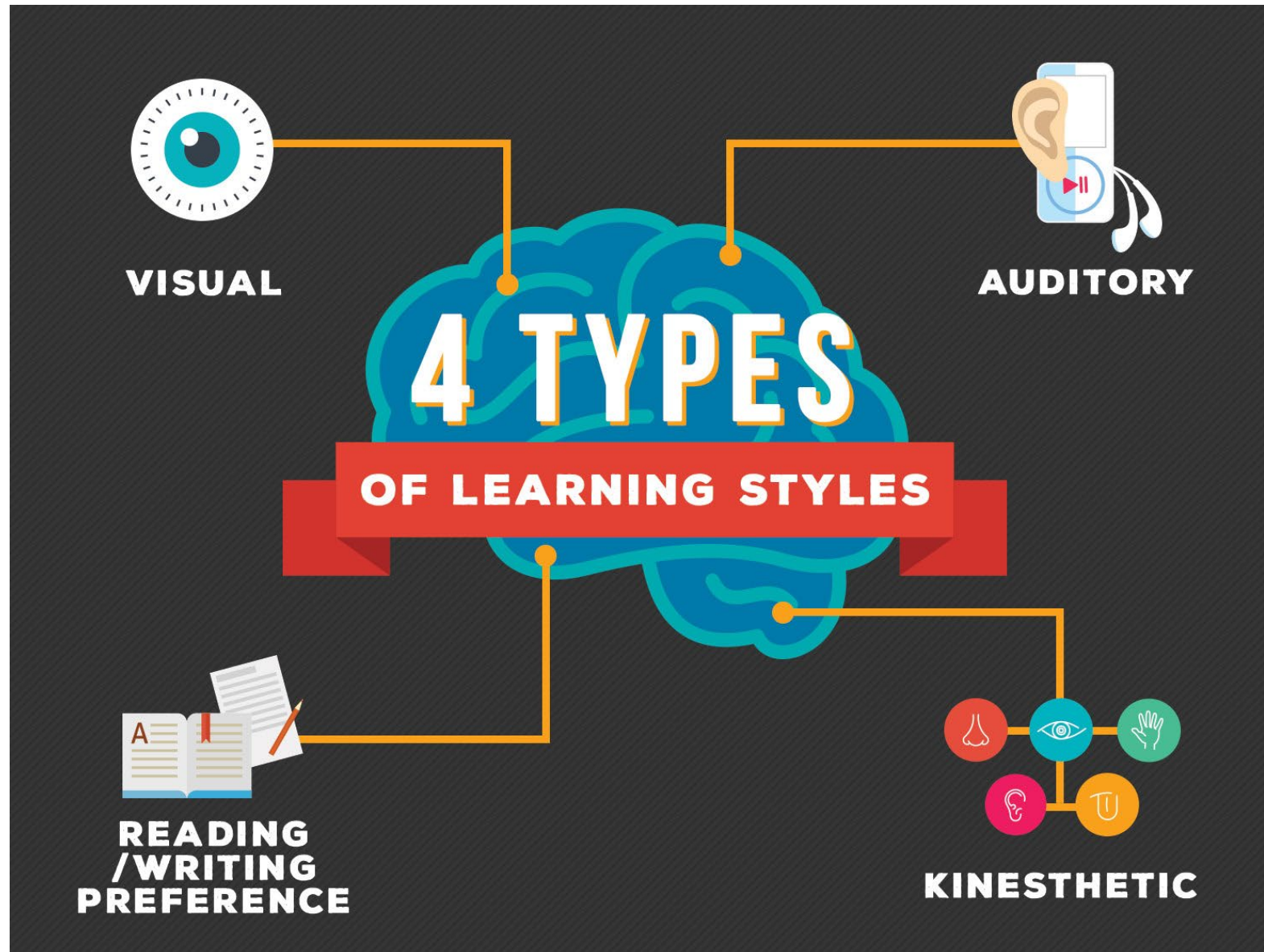
Course	Role	Data Submitter	Data User	Field Data Collector	Collect Designer	SPM Coordinator	DQM Users	Data Manager	User Manager	Administrator
Data User Set-up			X							
Data Submitter Set-Up		X								
Data Manager Set-Up								X	X	X
Introduction to Data Management and EQUIS		X						X	X	X
Checking and Loading Data using EQUIS Professional EDP								X	X	X
Checking Data using Standalone EDP		X								
Loading Data using EQUIS Enterprise EDP		X						X	X	X
Introduction to EQUIS Professional and Reporting								X	X	X
Introduction to EQUIS Enterprise			X					X	X	X
Configuring Enterprise Dashboards								X	X	X
EQUIS Administration 1									X	X
EQUIS Administration 2										X
EQUIS Collect for Field Users				X						
EQUIS Collect for Data Managers					X					X
DQM Training							X			X
SPM Training						X				X

## Role Based Training - Identify Scope of Role

- Data Submitter Role
- Responsible for:
  - Review of EDDs
  - Loading of EDDs to Enterprise
  - Regulatory Data Submissions
- Need:
  - Basic intro
  - Terminology
  - Reviewing EDDs using Standalone EDP
  - Loading data via Enterprise
  - Regulatory data submissions

Course	Role Data Submitter
Data Submitter Set-Up	X
Introduction to Data Management and EQUIS	X
Checking Data using Standalone EDP	X
Loading Data using EQUIS Enterprise EDP	X

# Role Based Training - Understand Your Audience



# Role Based Training - Identify Platform



Home Content Library Achievements Manager ▾

Welcome, Kristen Brown



SharePoint or other file sharing



Tracking training would be helpful



TRC Academy

# Problem solver. Pacesetter.

## My Training

[See All Assigned Courses & Learning Paths](#)

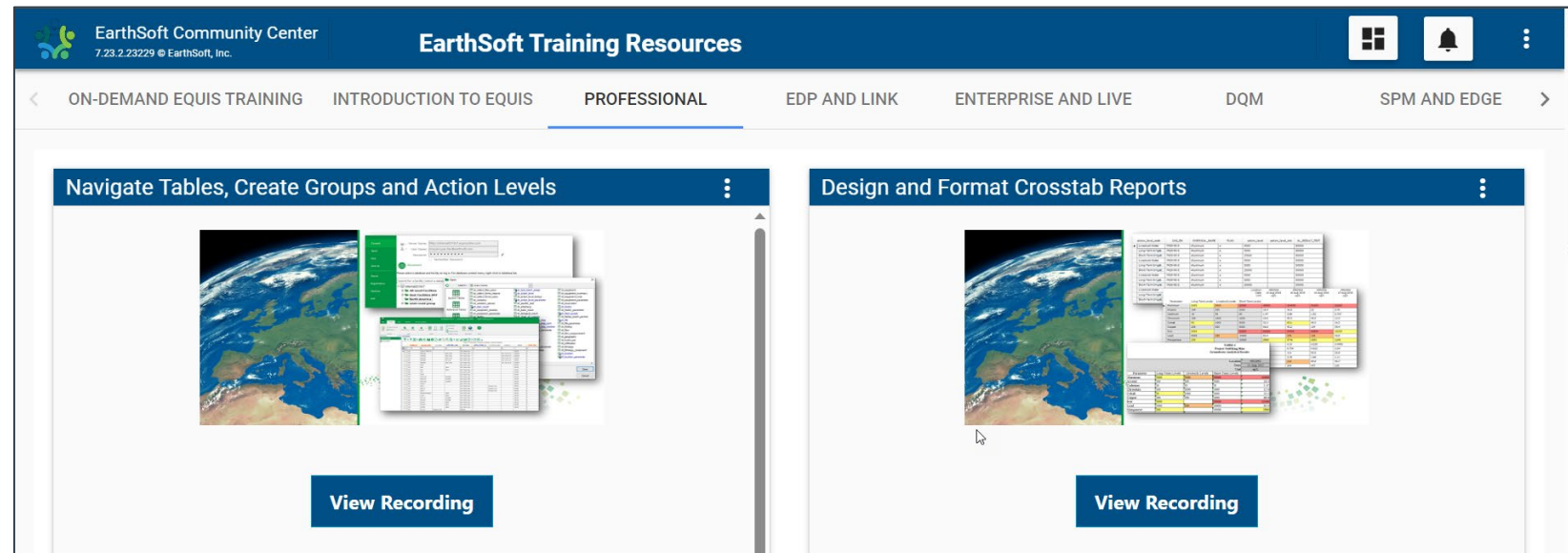
## News

# Developing Training Develop Materials

- Readily available resources
- Develop specifics
- Data Submitter Role
  - Basic intro
  - Terminology
  - Reviewing EDDs using Standalone EDP
  - Loading data via Enterprise
  - Regulatory data submissions

Course Name: **Introduction to Data Management and EQiS**  
 Course Description: This course will introduce you to the EQiS software, basic concepts in data management, EQiS focused terminology and provide an overview of the types of users.  
 Provide Course Picture:

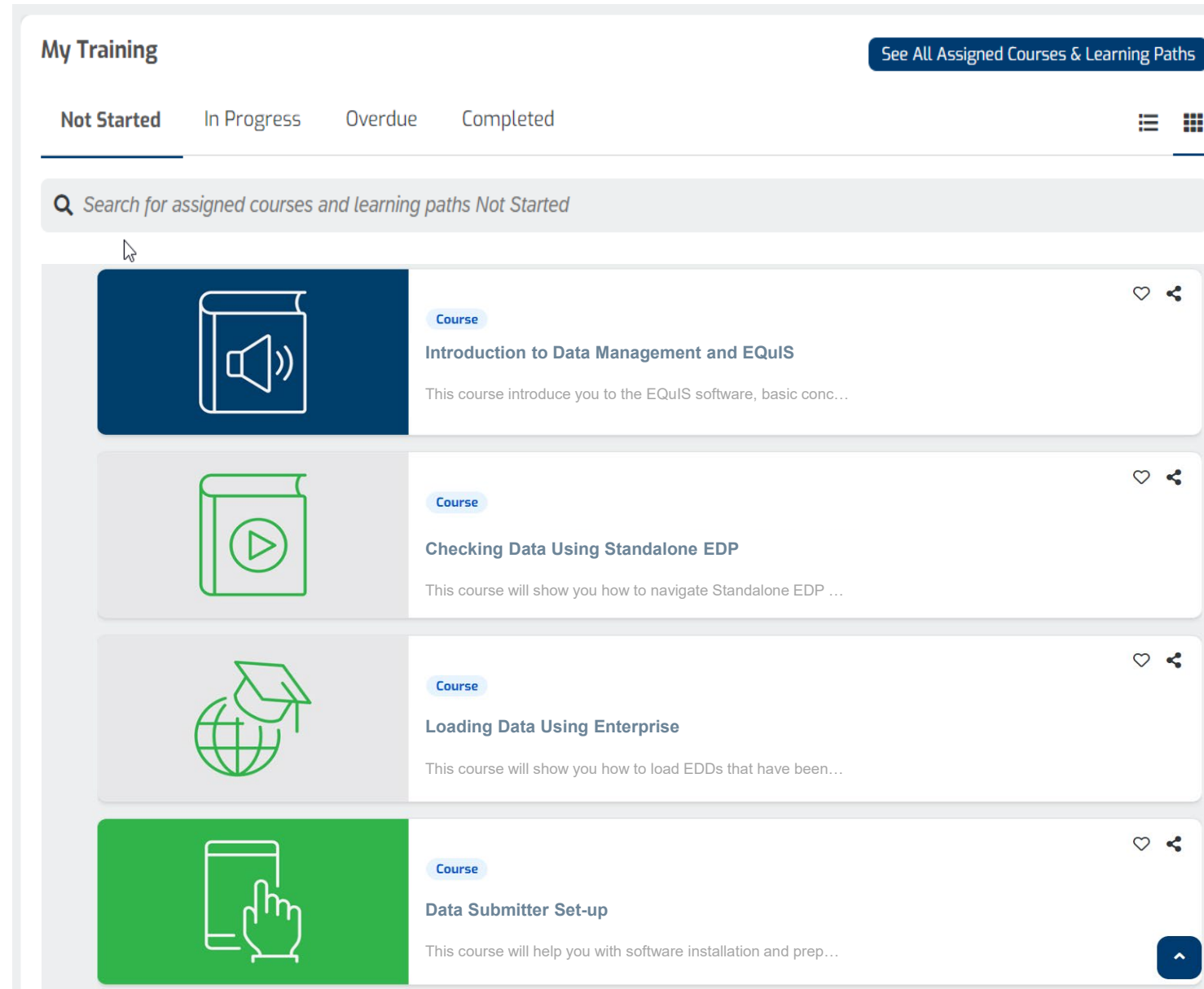
- i. Module(s) Name: *Introduction to EQiS* [Introduction to EQiS \(vimeo.com\)](#)
- ii. *EQiS Concepts and Terminology* [EQiS Concepts and Terminology \(vimeo.com\)](#)
- iii. *EQiS FAQ Series – Power Users and End Users (Who does what?)* [EQiS FAQ Series: Power Users and End Users – Who Does What \(vimeo.com\)](#)



# Developing Training

## Develop Materials

- Steps to develop role-based training
  - Identify scope of role.
  - Define learning style for training.
  - Define platform.
  - Develop materials.
  - Set training completion schedule.
  - Plan for improvements and updates.
- How can I incorporate this into user management?



**My Training** See All Assigned Courses & Learning Paths

Not Started | In Progress | Overdue | Completed

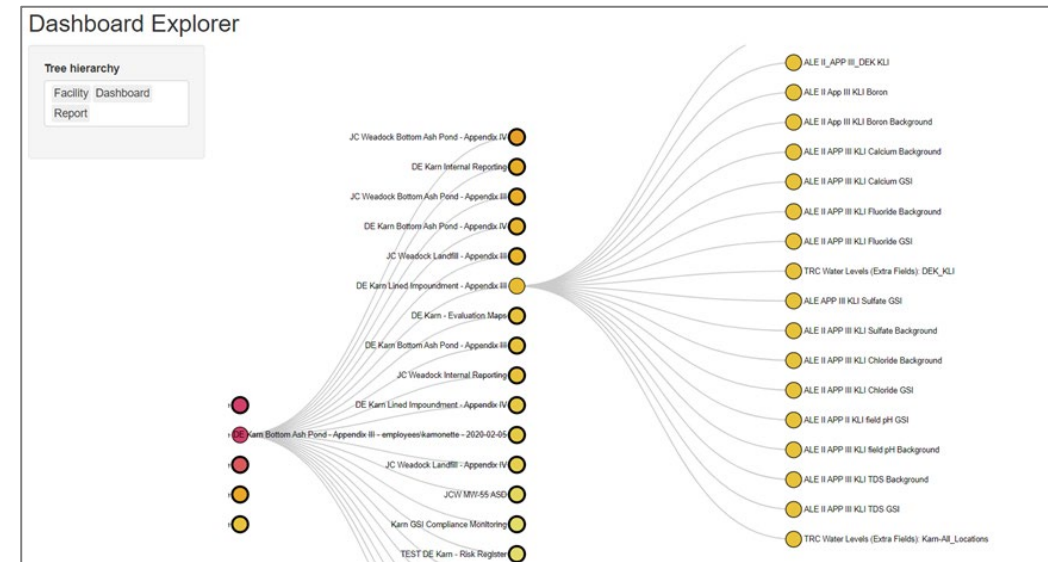
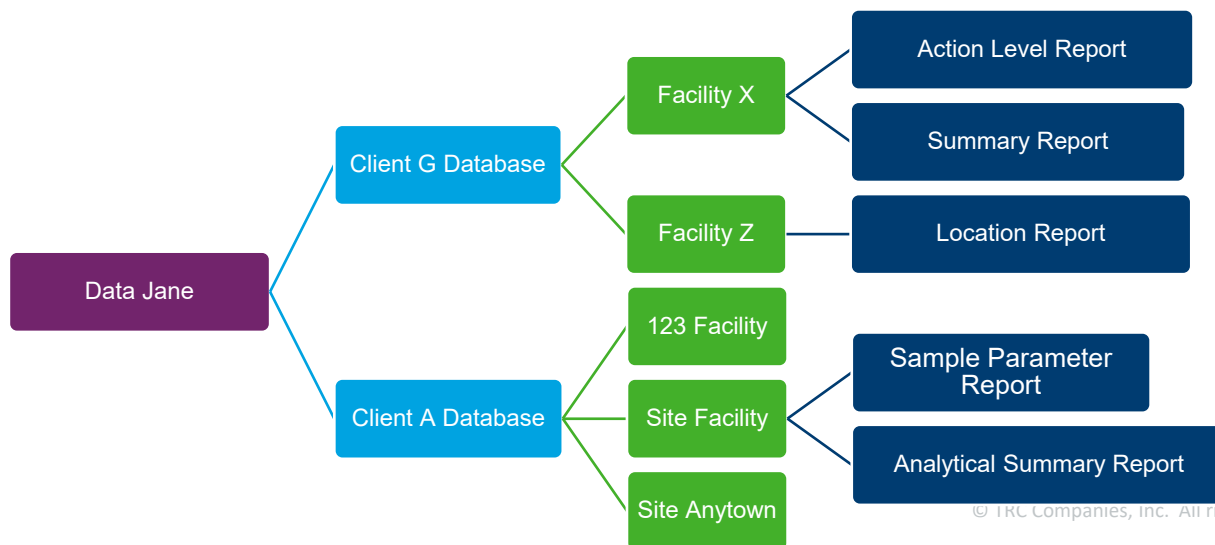
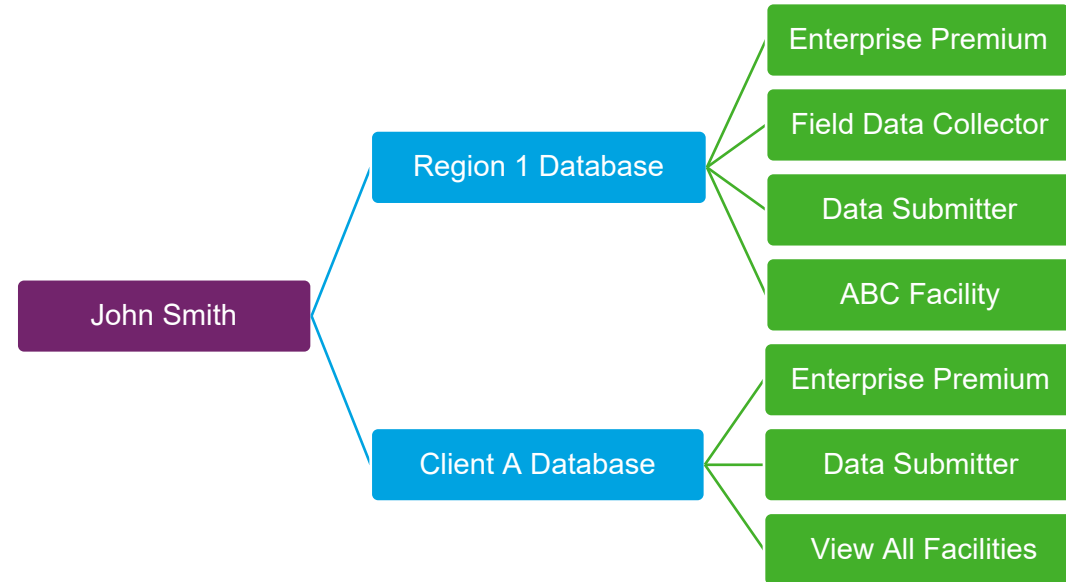
Search for assigned courses and learning paths Not Started

- Course**  
**Introduction to Data Management and EQuIS**  
This course introduce you to the EQuIS software, basic conc...
- Course**  
**Checking Data Using Standalone EDP**  
This course will show you how to navigate Standalone EDP ...
- Course**  
**Loading Data Using Enterprise**  
This course will show you how to load EDDs that have been...
- Course**  
**Data Submitter Set-up**  
This course will help you with software installation and prep...

# Developing User Administration Dashboard

## Initial Goals

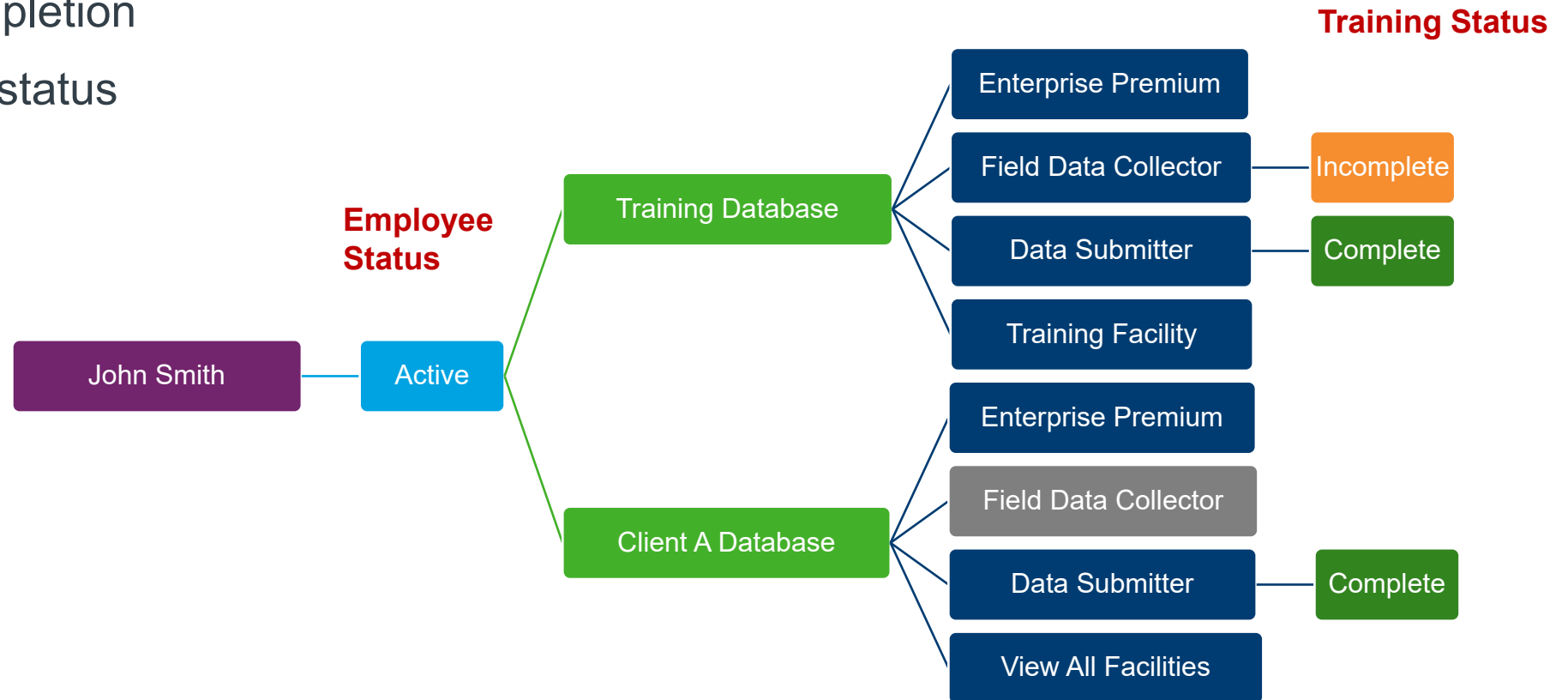
- Viewing at a user level
- Database access
- Roles
- User reports
- Enterprise Dashboards
- In widget user reports



# Developing User Administration Dashboard

## Phase 2 Goals

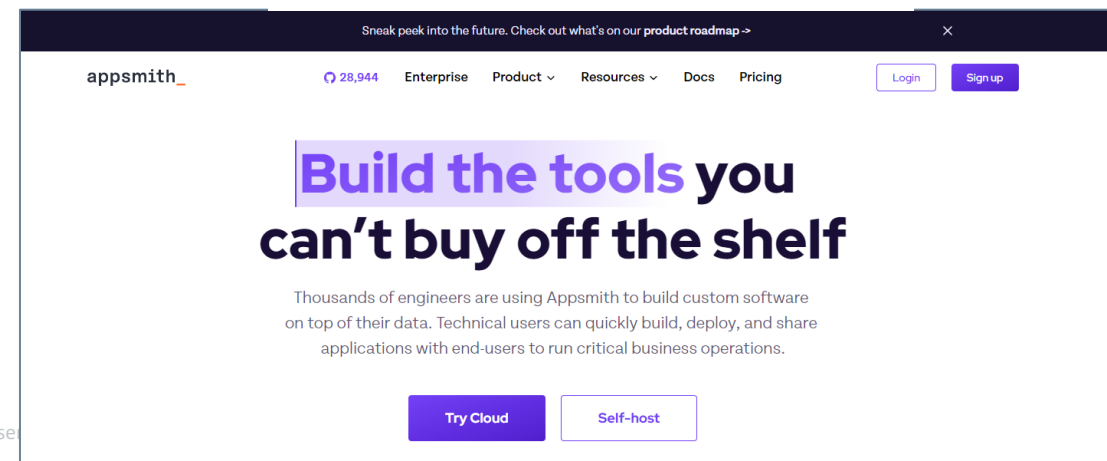
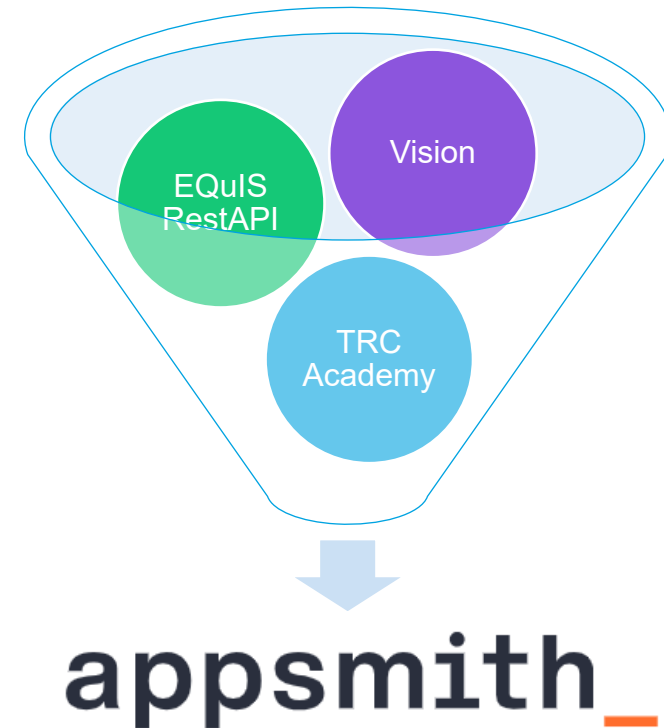
- Assigned Trainings
- Training Completion
- Employment status





# Developing User Administration Dashboard

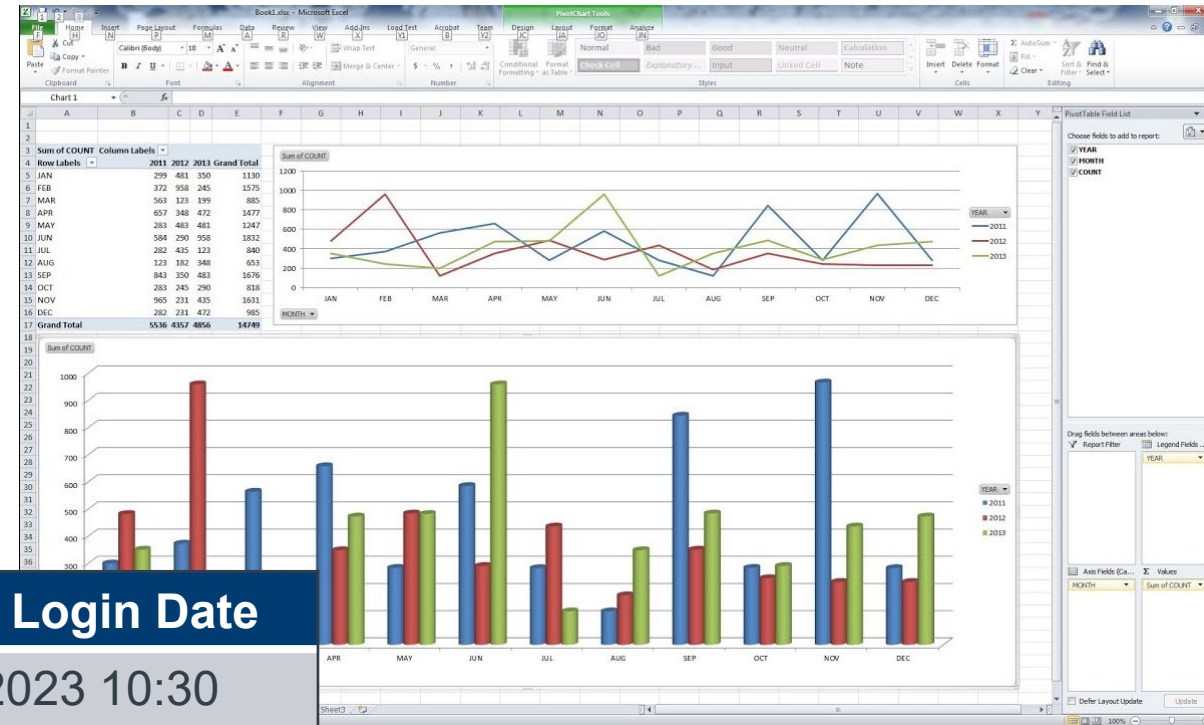
- Identifying the right tools and platform to develop the dashboard
  - Development ease
  - Long term support
  - Ease of expansion
- Appsmith
  - Low code option
  - JavaScript to extend functionality
  - Version control with Git
  - Powerful free version





# Future Development Plans

- Tracking usage statistics to predict when we may need to add more licensing.
- Tracking external client usage coupled with our accounting software to more easily bill clients for dashboard access.
- Token tracking.



External User	Facility	Last Login Date
janedoe@client.com	Site 1	9/5/2023 10:30
janedoe@client.com	Site 2	1/25/2022 6:47
janedoe@client.com	Site 7	4/19/2023 14:56

# Questions?



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