APWA

Self-Assessment Software

2019 SOFTWARE GUIDE

CONTENTS

OVERVIEW

Welcome to the Online Help section of the APWA Self-Assessment process.

This online software supports the formal verification of compliance (Accreditation) with the recommended practices set forth in the Public Works Management Practices Manual.

For any questions regarding this software, contact the Accreditation Team (accreditation@ apwa.net).

Before Getting Started

When purchasing the On-Line Software, you will be prompted for the key contact's email, in most cases the Public Works Director.

After completing the purchase of Public Works Management Practices Manual and On-line Software, the Key Contact (Public Works Director) will receive an email containing the product key for the agency. Take a few minutes to read the email before creating your agency account.

Creating the Agency Account

1. Navigate to https://selfassessment.apwa.net
2. Click Register.
3. Provide the requested information on the New Agency page. Your product key is provided in an email sent to the Key Contact (Public Works Director).
4. Click Save.

Note: The first person to login to the site MUST be the Public Works Director. The Product Key can be used **only one time.** The Director will be the key contact for the agency, assigned the highest security-level, and will assign the role of Accreditation Manager in the system.

MEET THE HOMEPAGE

Dashboard
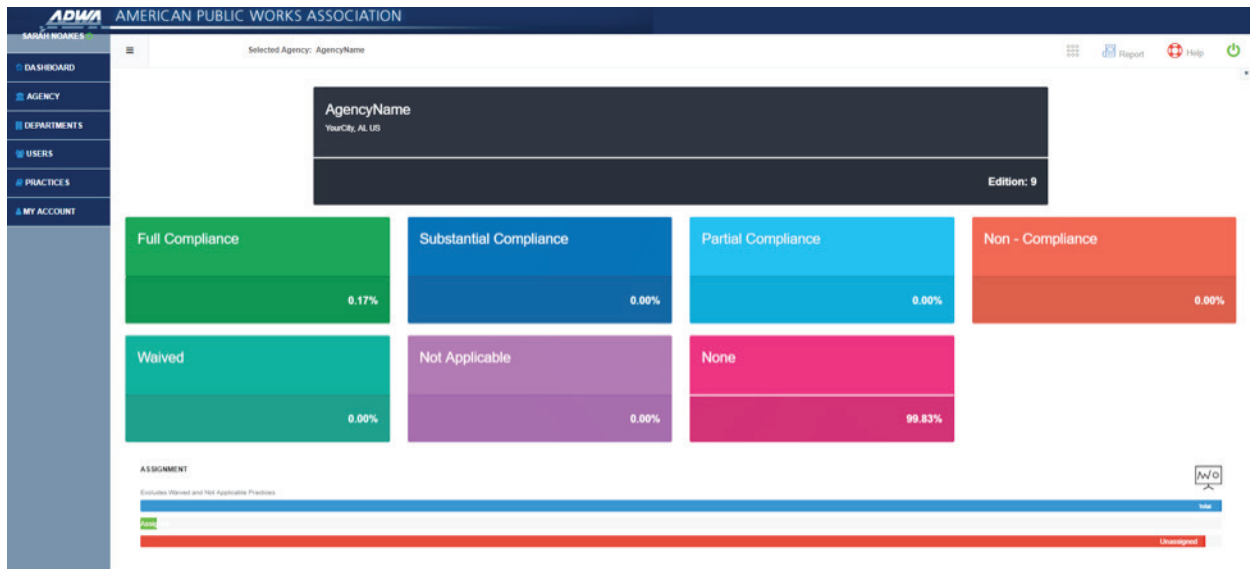
The Dashboard is your splash page, providing statistics about your Agency Compliance status, as well as an indicator of what edition your software content is. You can use this page as a goal post to encourage your team to complete their work on time in the practices.
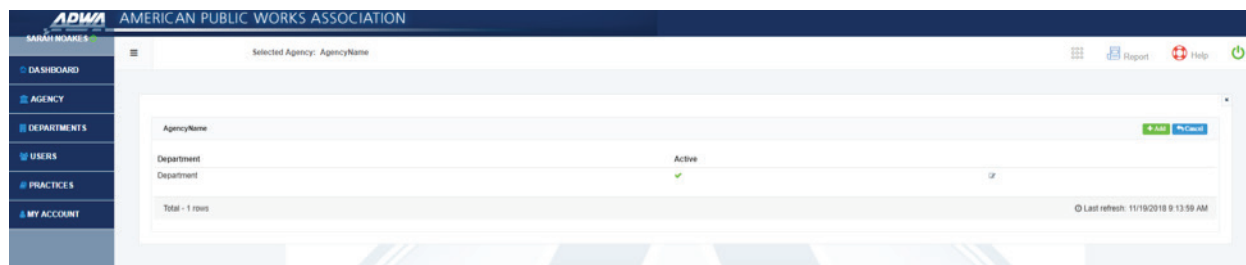
Agency

The Agency page is for editing your agency details, such as name. This page is only available for the director or accreditation manager.
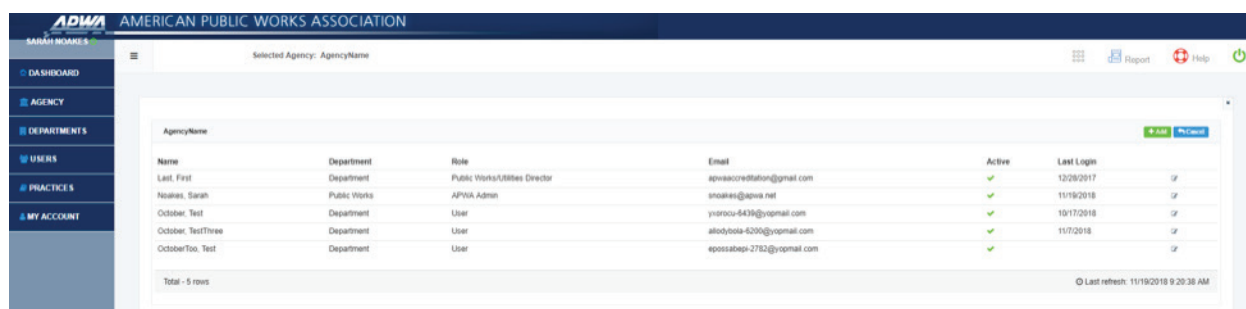
Departments

The **Departments** page allows managers to create and manage departments for the agency.

Only the roles of Accreditation Manager and Public Works Director have access to this feature. The use of departments allows assigning a task to a group of individuals. The Department Manager may choose to further distribute the assigned task(s) within his or her group.

Active departments may be set to inactive. While this will not affect already assigned practices, any new assignments will no longer offer this department as a choice. Any user now part of an inactive department may continue to log into the application; this supports the need to complete any already assigned tasks. However, this user can no longer be assigned any new tasks.

Important Notes: A Department must be created prior to creating any type of user. There is no limit to the number of departments that may exist for any given agency; however, it is only possible to assign a given user to one (1) department.

Users

The Users page allows managers to create and manage users for the respective agency.

The roles of Accreditation Manager and the Public Works Director have universal access to this page. Department Managers have access to this page; however, they may only view and manage users within their department.

The Public Works Director account is not viewable on the users list, except to the Public Works Director. If you must change the Public Works Director, please contact APWA at accreditation@apwa.net.

My Assignments

Users may view their active assignments by visiting **My Assignments**. It will look identical to the **Practices** view, except filtered for only their active assignments.

My Account

All users will access **My Account** to edit their account details, such as update to their email addresses or last names.

Note: Updating your email address **will change your login credentials** to both the Self-Assessment software *and* APWA.net.

ADDING USERS AND ASSIGNING ROLES

Roles & Accesses

The application maintains a total of five (5) roles. Each user in the system is required to be assigned to one (1) of those roles. Depending on the role assigned, the respective user will have access to certain functions and features associated with that role.

Public Works Director

This role will automatically be assigned to the individual that initially creates the Self-Assessment account for the agency. The Public Works Director has overall control of the agency's account and thus the highest access level. There should only be one (1) Public Works Director for a given agency. Responsibilities and access are:

- Manage Users
- Designate / Create Accreditation Managers and Department Managers
- Manage Departments
- Manage Tasks
- Complete and Approve Practices / Un-approve Practices
- Delete any Notes made by any user within the agency
- Access to all reports

Accreditation Manager

This role will be assigned by the Public Works Director and will serve as the manager of the Accreditation process within the application for the agency. There could be more than one (1) Accreditation Manager for a given agency. Responsibilities and access are:

• Manage Users

• Designate / Create Accreditation Managers and Department Managers

• Manage Departments

• Manage Tasks

• Complete and Approve Practices / Un-approve Practices

• Delete any Notes made by any user within the agency

• Access to all reports

Department Manager

This role will be assigned by either the Public Works Director or the Accreditation Manager in support of managing a specific department within the agency. The Department Manager has access to only users within their department; the Department Manager can also assign tasks to individuals within their department. Any tasks to be worked on by a given department will need to be assigned to the Department Manager previously by either the Accreditation Manager or the Public Works Director. There may be more than one (1) Department Manager for a given agency. The Department Manager role cannot modify other Department Manager accounts within the same department. Responsibilities and access are:

• Manage / Create Users within their own department

• Manage Tasks for their own department / own account

• Manage practices assigned to the department by the Public Works Director or the Accreditation Manager

• Access to all reports

"The Accreditation Manager has access to all chapters in the software without being assigned to them."

User

Assigned by previous roles, the role of User will be assigned tasks to complete by the identified deadline. This role has no access to any other screen other than "My Assignments" in order to work on practices.

Once a user selects a status (Full Compliance, Substantial Compliance, Not Applicable or Waived) for a given task and saves their work, the task will automatically be removed from the user's My Assignments view as the user has now taken the task as far as possible under their role in the system. There could be more than one (1) User for a given agency. Responsibilities and access are:

• Manage only their own tasks

• Access to all reports

Viewer

This role may be assigned to staff by Accreditation Managers and provides read-only access to the software.

Create/Edit a User

To add a user, click "+Add" on the Users page.

AgencyName						
Name	**Department**	**Role**	**Email**	**Active**	**Last Login**	
Last, First	Department	Public Works/Utilities Director	apwaaccreditation@gmail.com	✔	12/28/2017	✎
Noakes, Sarah	Public Works	APWA Admin	snoakes@apwa.net	✔	1/2/2019	✎
October, Test	Department	User	yxorocu-6439@yopmail.com	✔	12/13/2018	✎
October, TestThree	Department	User	allodybola-6200@yopmail.com	✔	1/2/2019	✎
OctoberToo, Test	Department	User	epossabepi-2782@yopmail.com	✔		✎
user fix, test	Department	User	pesujufave-7489@yopmail.com	✖	11/29/2018	✎
Total - 6 rows					Last refresh: 1/2/2019 10:41:26 AM	

Fill in all required fields (marked with a *). **Ensure the "Active" button is switched "On."**
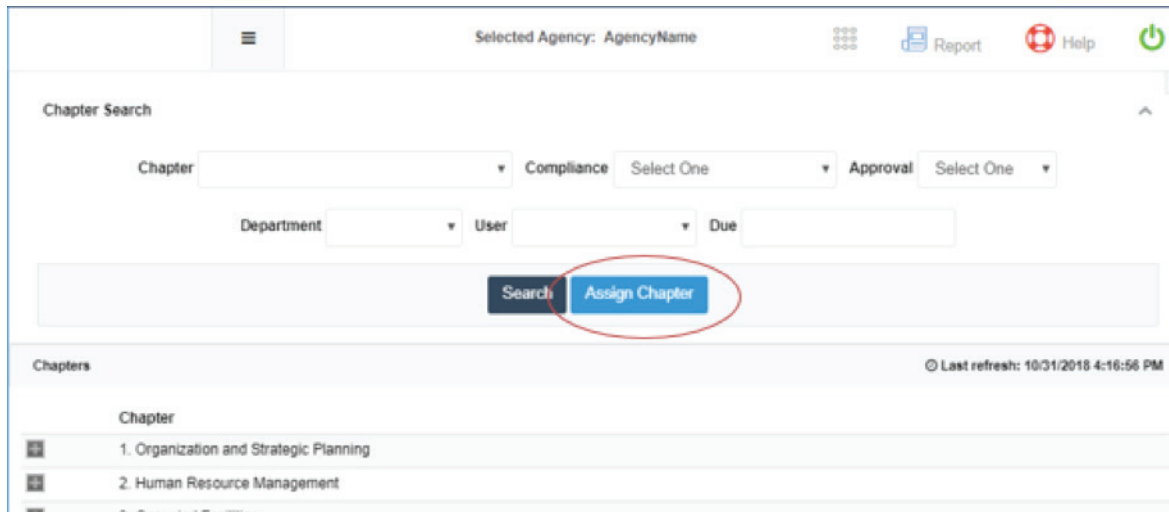
Active
On

"Don't forget...click the "Active" button to give access to the software."

MANAGING ASSIGNMENTS

Accreditation and Department Managers may manage assignments at the Chapter or Practice Level.

To assign at the Chapter level:

1. Select Assign Chapter from the Practices grid.
2. Select the chapter you would like to assign. You may select all practices or only a few from a chapter.
3. Select the Assignees from the list. Multiple assignees can be selected.
4. Create a Due Date.
5. Click Assign.

You may remove all assignments from the Chapter by selecting the chapter and then clicking "Remove All".
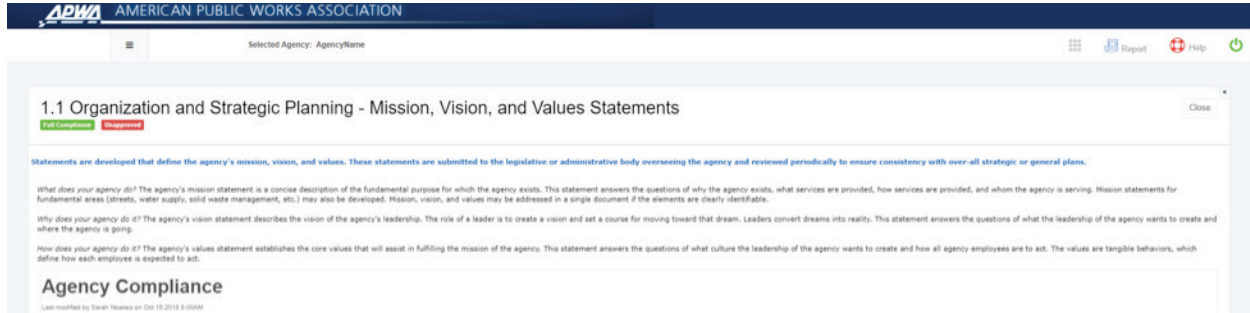
To assign at the practice level, click the "Assignment" button next to the "Edit Practice" button on the practice grid.

"When selecting a Due Date, it must be at least 24-hours later to the day."

WORKING IN ASSIGNED PRACTICES

Edit Practice View

Click the Pencil icon in the **Practices** grid, or the **My Assignments** page, to open
Edit Practice view.

The detail view displays the respective chapter and section number, as well as the practice content for review and instruction for the user; this information cannot be edited.

There are two boxes under the practice content: Agency Compliance, and Documentation/Directives.

Agency Compliance

The agency should provide a brief explanation as to how the agency is compliant with the practice. This is where you will "tell your story", using your uploaded documents or hyperlinks to support the statement. If the practice is Not Applicable (NA) to the agency, the agency must provide a statement as to why it does not apply.

Documentation / Directives

The agency will list all supporting documents by name and either upload to the practice or insert a hyperlink, image or video. Consider this as the Table of Contents for your practice.
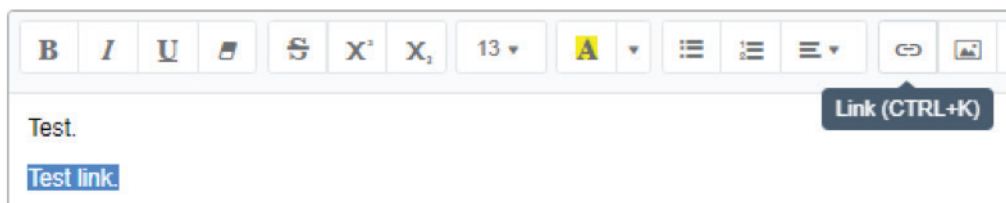
Rich Text Editor

Click the **Edit** button under **Agency Compliance** or **Documentation/Directives** to edit these sections.

You may highlight text and click the "B", "I", or "U" to bold, italicize, or underline items. You may also change text size or background (highlight) color.

Inserting Links

You may highlight text and click the "Link" button (or push CTRL+K) to create a hyperlink.

Inserting Images, Videos

Click the "Picture" button to bring up the Insert Image menu. You can select a file or insert the URL for the image. You do not need both.

Click the "Video" button to insert a video. Only URLs from YouTube, Vimeo, Vine, Instagram, DailyMotion or Youku are supported.

Insert Link from Network File

Select text, then click the "File Link" button. Insert the exact network URL of your file. Click OK.

Link to file only works in Internet Explorer. For other browsers, open a new tab/window, and paste the URL in address box to view this file.

IMPORTANT: You need the exact network URL of the network file. Local URLs beginning in C:\… D:\… M:\… Z:\… etc will NOT work.

It should look like: \\NAMEOFNETWORK\Shared\YourFileLocation\File.pdf

To get this URL, you can open a Word document or a New Outlook Email. ***Right-Click Drag*** the file in to the body of the email. When you let go of the mouse button, a context menu will appear. Select "Create Hyperlink Here." That should print out the hyperlink. **Use this hyperlink for the Insert Network File.**

Attaching/Viewing Files

Click "Files" under Documentation/Directives to access files per practice.

To add a file, click "New File." Select your file from the browse menu and click Upload. Click Cancel to return to previous menu. Remember, a file cannot exceed 4MB in size to be uploaded. There is no limit as to how many documents can be uploaded to the software.

To view a file, select a file in the dropdown and click "View File."

To delete a file, select a file in the drop down and click "Delete File."

Click Close to return to the practice.

> *"You will receive an error message if trying to upload a document larger than 4MB."*

Agency Compliance Levels

Below the chapter and section content is the compliance drop down feature, which allows the user to select the level of agency compliance with the manual's directive. If uncertain of the status that should be selected, contact the Public Works Director or Accreditation Manager for guidance.

Available values are:

None
Initial status of any practice as an agency subscribes for the first time. No work has been started yet.

Not Applicable
A user chosen value indicating the practice does not apply to the agency.

Non-Compliance
A user chosen value indicating the work completed so far on this particular practice cannot be considered compliant.

Partial Compliance
A user chosen value indicating the work completed so far on this particular practice can be considered partially compliant; work will need to continue.

Substantial Compliance
A user chosen value indicating the work completed so far on this particular practice can be considered substantially compliant; work is almost complete.

Full Compliance
A user chosen value indicating the work completed on this particular practice can be considered fully compliant; work has been completed. Once a practice is marked as fully compliant, both a user and a department manager will no longer have any visibility to the task via this screen. However, this information for the practice can still be accessed through the reporting feature.

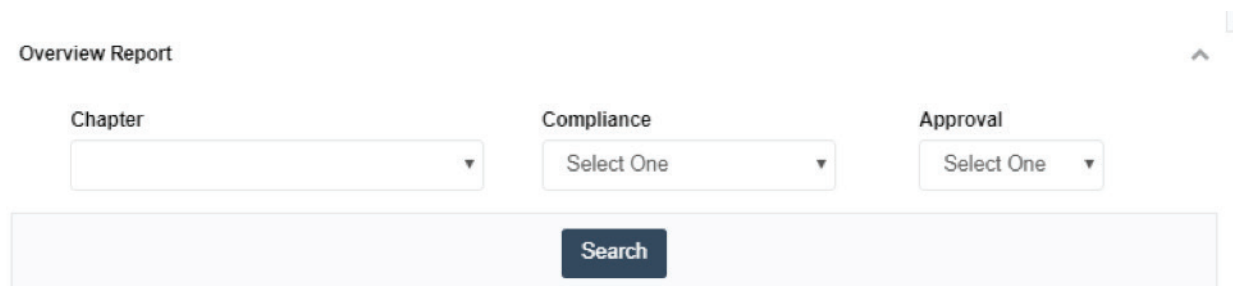*"Use the compliance levels to monitor progress; it will be reflected on the Dashboard page."*

REPORTS

Overview Report

The **Overview Report** screen is used to accomplish the following:

Provide the ability to generate a comprehensive overview of all chapters and sections as it relates to the specific agency.

Click **Report** in the top right-hand menu, then **Overview** to access this report.

Clicking "Search" with no criteria set will return the entire report for the agency. You may narrow down the report by Chapter, Compliance Level, or Approval Level by selecting those criteria.

This report includes the content language for each practice as well as placeholders for appropriate written sign off by the Accreditation Manager and Public Works Director, found at the conclusion of each Chapter/Section. Signatures can be added once the report has been printed.

This report is especially helpful, if the agency would like to maintain a printed copy of its compliance status.

Regardless of the role assigned to the user running the report, this report will provide complete visibility for the entire agency. In other words, both a User and a Public Works Director will see the same data for the entire agency.
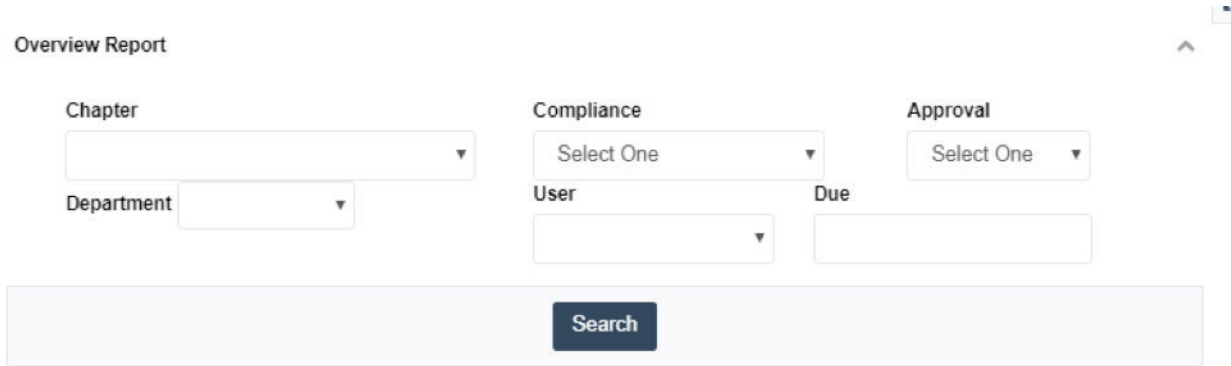
"With the printing of this report, you could have a completed SOP manual, minus any uploaded documents."

Task Summary Report

The **Task Summary Report** screen is used to accomplish the following:

Provide the ability to generate a comprehensive overview of the agency's current status at the individual task level.

Click **Report** in the top right-hand menu, then **Task Summary** to access this report.

Clicking "Search" with no criteria set will return the entire report for the agency. You may narrow down that report by selecting criteria.

Regardless of the role assigned to the user running the report, this report will provide complete visibility for the entire agency. In other words, both a User and a Public Works Director will see the same data for the entire agency.

Once all desired filters have been set via the query panel, the system compiles and displays the qualified information on the screen. If chosen, it is possible to export the query results into three (3) commonly used formats: Excel, Word and PDF formats.

"Accreditation Managers, this is a great quick view of work progress."

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