



# PA WITS

*Prevention Agency  
Administrator Guide*



**pennsylvania**  
DEPARTMENT OF DRUG AND  
ALCOHOL PROGRAMS

Applies to:

WITS Version 18.0+

**PA DDAP**

Last Updated May 21, 2018

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# Part 1: System Requirements

WITS is a web-based application accessed through an Internet (web) browser using Internet connection.

## Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple Safari
- Google Chrome
- Mozilla Firefox
- Windows Internet Explorer version 10+ (**recommended**)

## Pop-up Blocker

Certain features in WITS, such as Snapshot, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

## Customer URL Links

**Training Site:** <https://pa-training.witsweb.org>

The training site allows staff members to practice using the system before entering actual data in the production site.  
*Please do not enter real client information in to the training site.*

**Production Site:** <https://pa.witsweb.org/>

## Part 2: Staff Administration

As Agency Administrator, your role is to create and manage staff. This means setting up new employees and giving them user accounts that control their access to facilities and screens through role assignments, as well as resetting passwords and troubleshooting login problems.

### Staff Member List



Where: **Agency > Staff Members**

Table 2-1: Staff Member System Icons

Icon	Description	Icon	Description
Add	<b>Add:</b> Allows the user to add data to the panel or section.		<b>Edit:</b> Allows the user to edit information on a panel or section.
	<b>Remove:</b> Allows the user to delete information in the panel or section.		<b>Lock:</b> Allows the user to lock an item.
	<b>History:</b> Allows the user to view the changes made on the current page.		<b>Panel View:</b> Presents data in a panel by panel view.
	<b>Table View:</b> Presents data in a table format.		<b>Export:</b> Allows the user to export results.
	<b>Column Selector:</b> Allows the user to select the columns that they would like to view.		<b>Hover Text:</b> When you hover over an item or symbol text describing the item may appear.

Icon	Description
<b>From: ... To: 123</b>	<b>Eye Icon:</b> Allows the user to see protected information hidden by dots. By hovering over the icon, they can now see the actual information contained within the field.
You cannot add more than one Social Security Number.	<b>Error Message:</b> The error message is localized and is generated where the error occurred.
	<b>Required Field:</b> Has a red bar to the right of the field. User must enter data to save.
	<b>Discretionary Field:</b> Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.

Icon	Description
	<b>Pages:</b> Allows the user to page through all search results.
	<b>Date Picker:</b> Allows the user to pick a date from a calendar.
	<b>Likert Scale:</b> Presents information visually and allows for quick interpretation of the data.
	<b>Collapsible Menu:</b> The left-hand navigation menu is collapsible in WITS on the Staff Member and System Account screens. When it is collapsed, you will only see the icon to the left. When it is un-collapsed, you will see the entire left-hand navigation panel.

## Staff Member Search



Where: [Agency > Staff Members](#)

From the Staff Member Search screen, you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin		
System	User	Administrative Agency	Active	noreply@feisystems.com	system		
Pre-WITS Migration	Process	Administrative Agency	Active	rodney.conrad@feinfo.com	PProcess-105		
Manan	Katohora	Administrative Agency	Locked	Manan.Katohora@feisystems.com	mkatohora	01/01/2015	
Kristyn	OReilly	Administrative Agency	Active	kristyn.oreilly@feisystems.com	koreilly	02/26/2017	
CTE	editor	Administrative Agency	Active	kristyn.oreilly@feisystems.com	Codetable	02/28/2017	

## Types of Prevention Users

After creating the New Staff Member and User Account (instructions below), roles can be granted to the staff member. When adding roles, it's important to consider the type of data the individual staff member will be entering and what type of information the individual needs access to within WITS. Staff Administrators can create PA WITS user accounts for their agency's staff members by following the instructions outlined in the section, "How to Setup a New Staff Account".

### SCA Agency Administrator

An Agency Administrator User Account has been created for your agency with the roles **Staff Administrator, Prevention Plan (Full Access), SSRS Agency User** and **Can Grant/Revoke SSRS Roles**. With these roles, the agency administrator can create/manage staff members, run reports and troubleshoot prevention plan issues. For additional Agency Administrator Accounts or to inactivate an existing Agency Administrator Account, please contact the PA WITS Service Desk.



The screenshot shows a user account profile for 'SCAAgencyAdmin'. It lists the following roles:

- System Roles:**
  - Can Grant/Revoke SSRS Roles
- Agency Roles:**
  - Prevention Plan(Full Access)
  - Staff Administrator
  - SSRS Agency User

### Agency Oversight Permission

PA WITS provides agency oversight permission that would enable a user at the SCA to enter data on behalf of a contracted provider. If an SCA requires access to create staff accounts or enter prevention services on behalf of a contracted provider (Direct Service Provider); the SCA Agency Administrator may contact the PA WITS Service Desk to request the agency oversight permission.

### Provider Agency Administrator

An Agency Administrator User Account has been created for your agency with the roles **Staff Administrator** and **SSRS Cross Agency Reader**. With these roles, the agency administrator can create/manage staff members, run reports and troubleshoot service entry issues with your staff. For additional Agency Administrator Accounts or to inactivate an existing Agency Administrator Account, please contact the PA WITS Service Desk.



The screenshot shows a user account profile for 'ProviderAdmin'. It lists the following roles:

- System Roles:**
  - SSRS Cross Agency Reader
- Agency Roles:**
  - Staff Administrator

## SCA Prevention Staff - Planning

This User Account should be set up with the role **Prevention Plan (Full Access)**. This role will allow users to create and submit Prevention Plans.

**User Account** ▼

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User ID: **CountyStaff**

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System Roles:

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Agency Roles

- **Prevention Plan(Full Access)**

## SCA and Provider Prevention Staff - Implementation

This account can be created for staff who will only be entering services for programs that are implemented. The User Account should be created with no roles assigned.

**Agency Accounts** ▼

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**Direct Service Provider**

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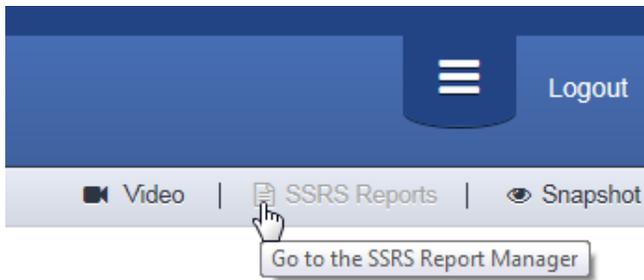
Roles

## Grant Access to Reports

### PA WITS Reporting: What is SSRS

PA WITS uses Microsoft® SQL Server® Reporting Services (SSRS) 2016 and Microsoft® SQL Server® 2016 Report Builder 3.0 as the primary reporting and analytics tool for WITS. SSRS is a web-based application allowing the development, storage, and generation of user-generated reports on data collected directly in WITS, in real time.

Users with SSRS roles will be able to view the SSRS Reports link located at the top right section in WITS. Clicking the SSRS Reports link will then open SSRS Web Portal in a new browser tab.



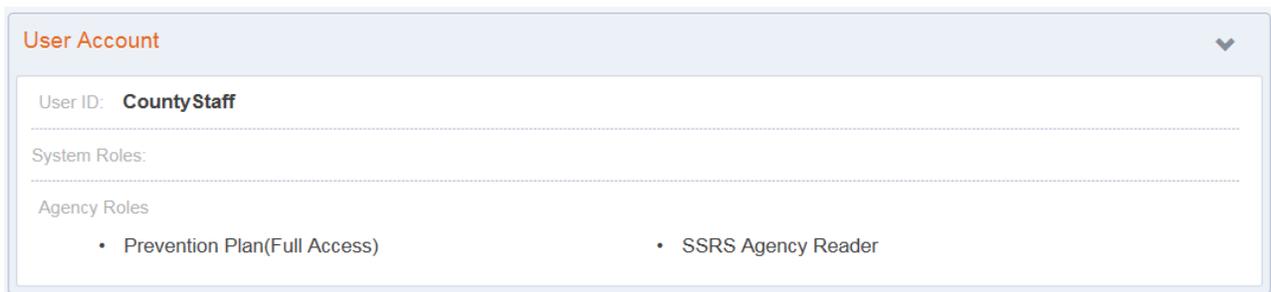
## Provider Report Access

Prevention Provider Agency Administrators have been granted access to reports in PA WITS. This includes the ability to setup report subscriptions that allow you to automatically email reports to any staff member at your organization on a defined frequency (please see the PA WITS SSRS User Guide section “Report Subscriptions” for more details.) If report subscriptions do not meet the needs of your users, Agency Administrators may contact the PA WITS Service Desk to request SSRS access for additional users at [RA-DAPAWITS@pa.gov](mailto:RA-DAPAWITS@pa.gov).

## SCA Report Access

PA WITS provides a robust reporting services web portal using Microsoft SQL Server Reporting Services (SSRS). SCA Agency Administrators can assign the **SSRS Agency Reader** or **SSRS Agency User** roles to staff that require access to reports in PA WITS. The SSRS Agency Reader role will allow users to run existing reports created by DDAP (recommended role). The SSRS Agency User role will provide additional permissions that allow your staff to create reports using Report Builder and make them available through the Web Portal. For more information about how to access, create or run reports please refer to the PA WITS SSRS User Guide.

Example: County Staff with the ability to run reports (SSRS Agency Reader).



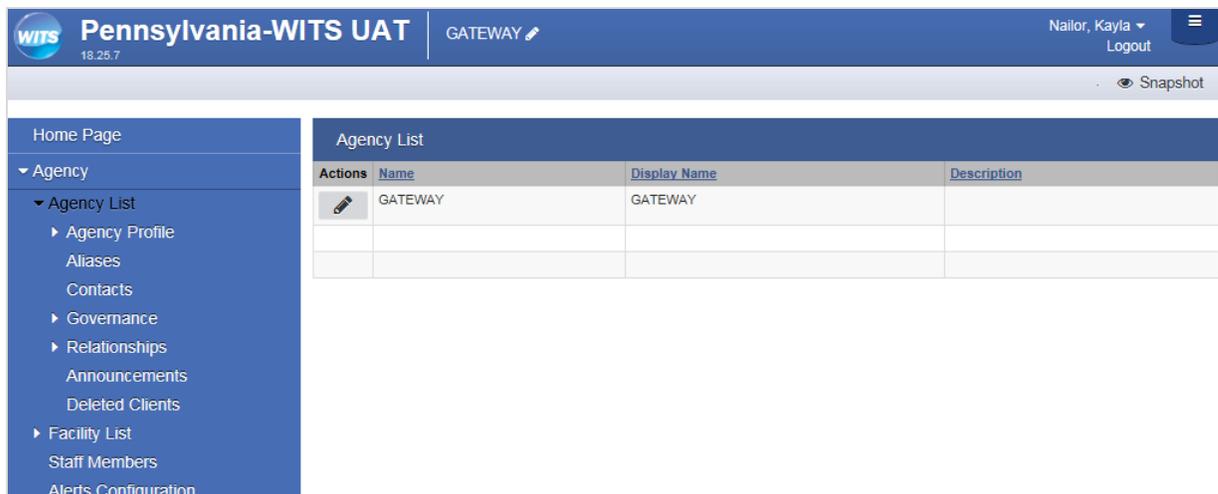
## How to Setup a New Staff Account



*Where: Agency > Staff Members*

### Create New Staff Member

1. On the left menu, click **Agency**, and then click **Staff Members**.



2. Click the **Create New Staff Member** button.

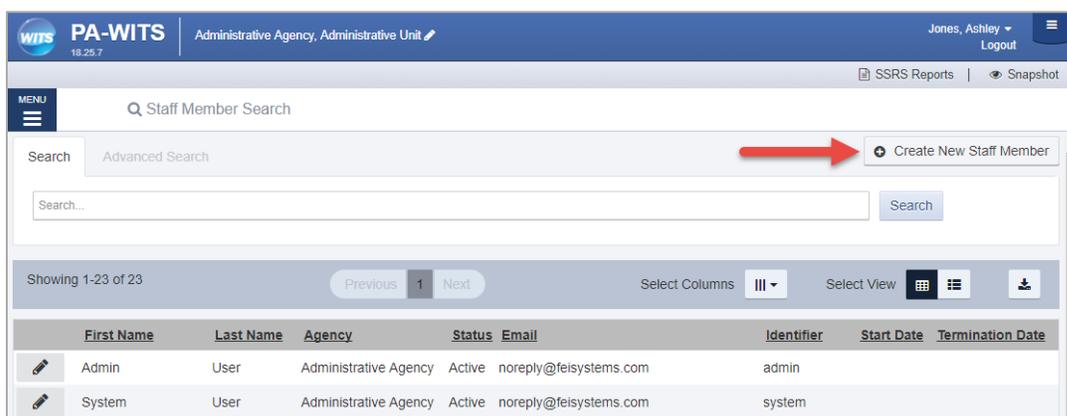


Figure 2-1: Staff Member screen

3. On the **Create New Staff Member** screen, complete at least the required fields. Required fields are indicated by a red bar to the right of the field.

Table 2-2: Create New Staff Member fields

Field	Description
<b>Prefix</b>	Optional field.
<b>First</b>	Type the staff member's first name.
<b>Preferred</b>	Optional field. Type the staff member's preferred first name.
<b>Middle</b>	Optional field.
<b>Last</b>	Type the staff member's last name.
<b>Suffix</b>	Optional field.
<b>Gender</b>	Select the staff member's gender from the drop-down list.

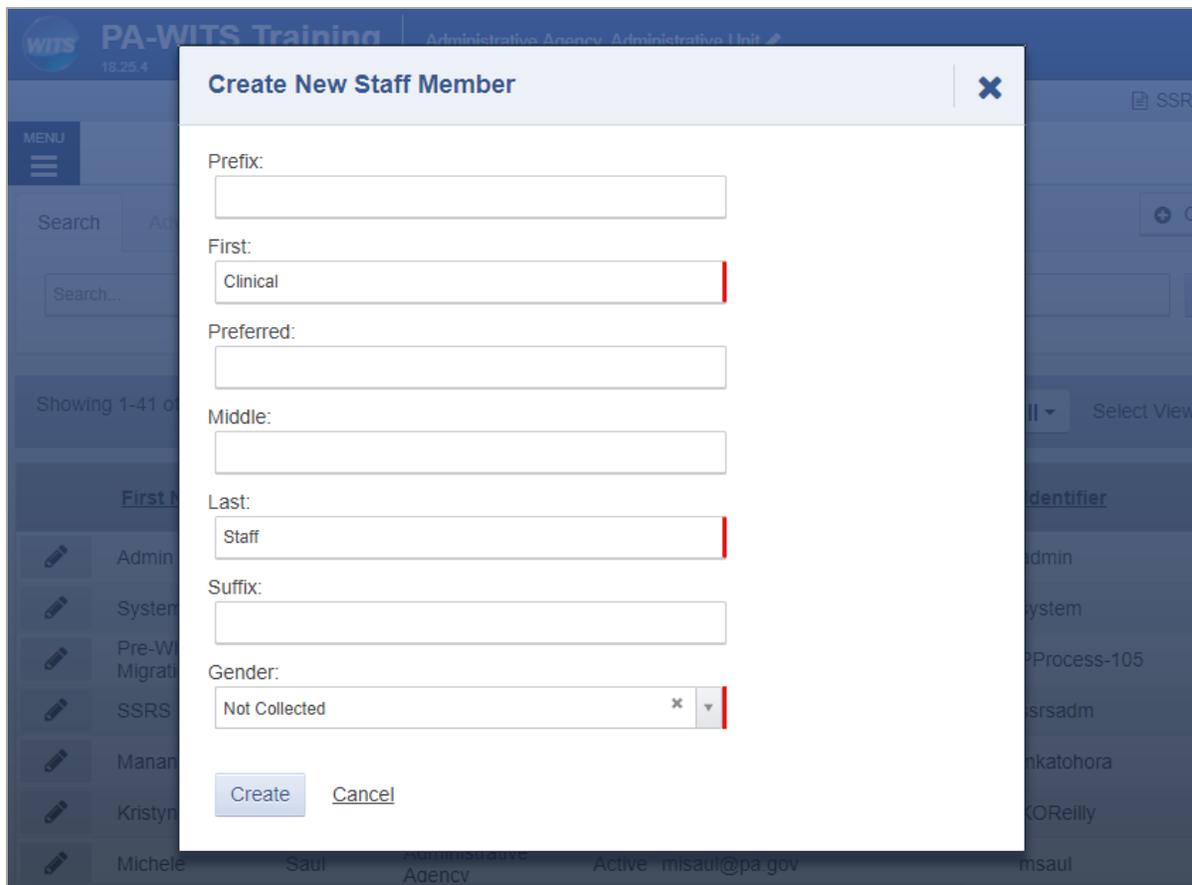


Figure 2-2: Create New Staff Member screen

4. Click **Create**. **Note:** The Create button will only appear when all the required fields have been completed.

## Completion Requirements

5. On the right side, point to the **Completion Requirements**. These completion requirements can be entered in any order.

## Add Email Address

6. Click **Add Email Address**. This will open the Contact Information panel.

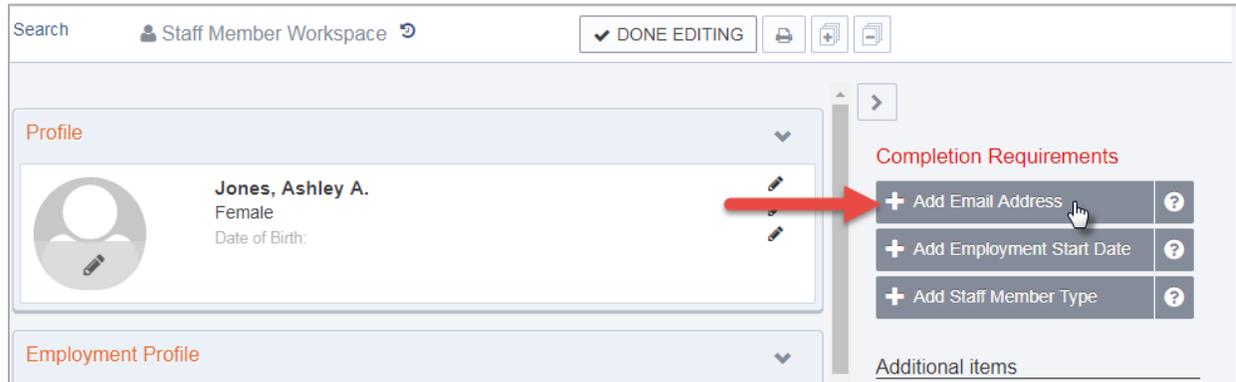
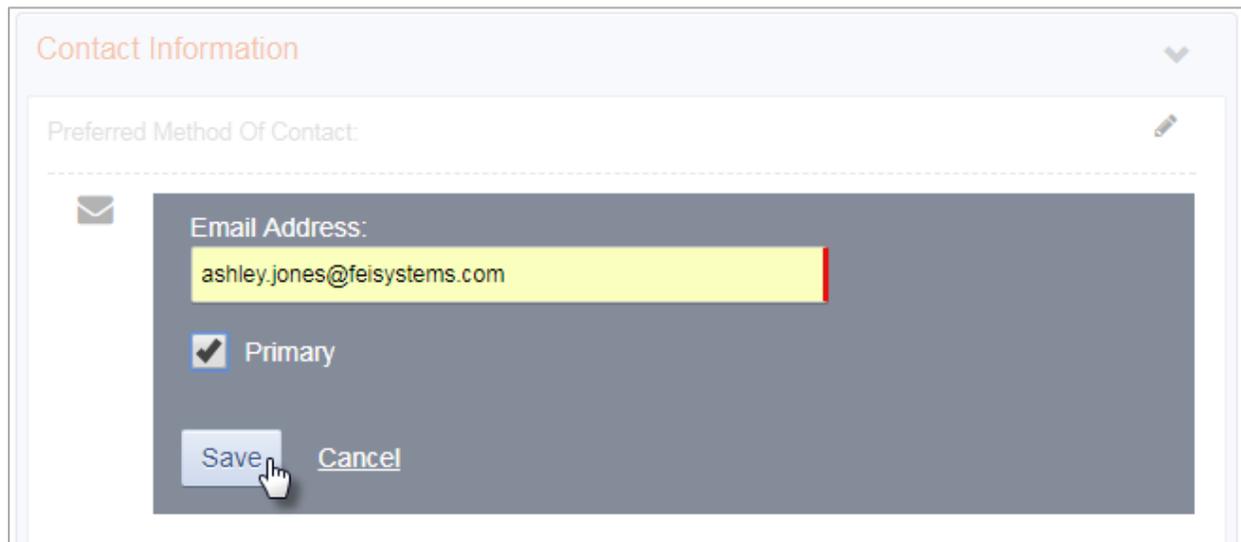


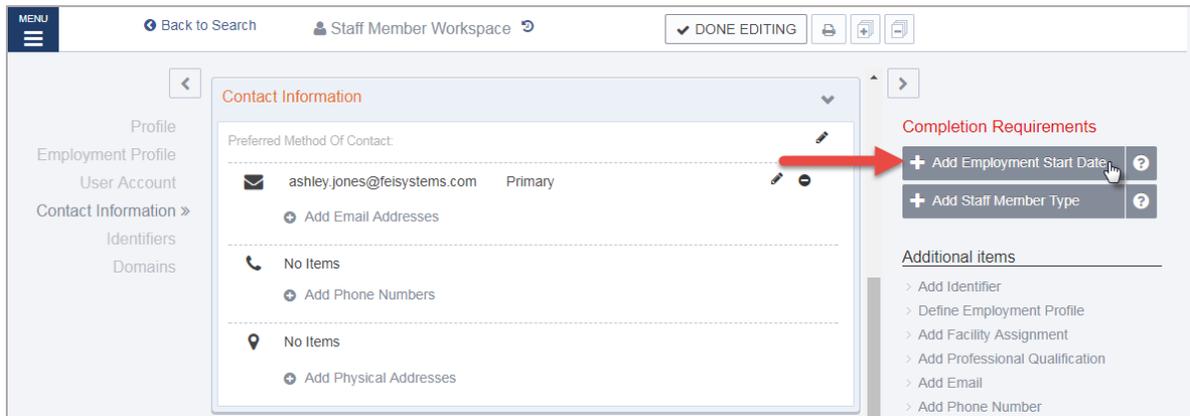
Figure 2-3: Completion Requirements, Add Email Address

7. On the **Contact Information** panel, type the staff member's email address, check the Primary box and then click **Save**.



## Add Employment Start Date

- On the right side, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.



- On the Employment Panel, in the **Employment Date Range** field, enter the employee's start date or use the calendar to select the start date. Stay on the Employment Panel.

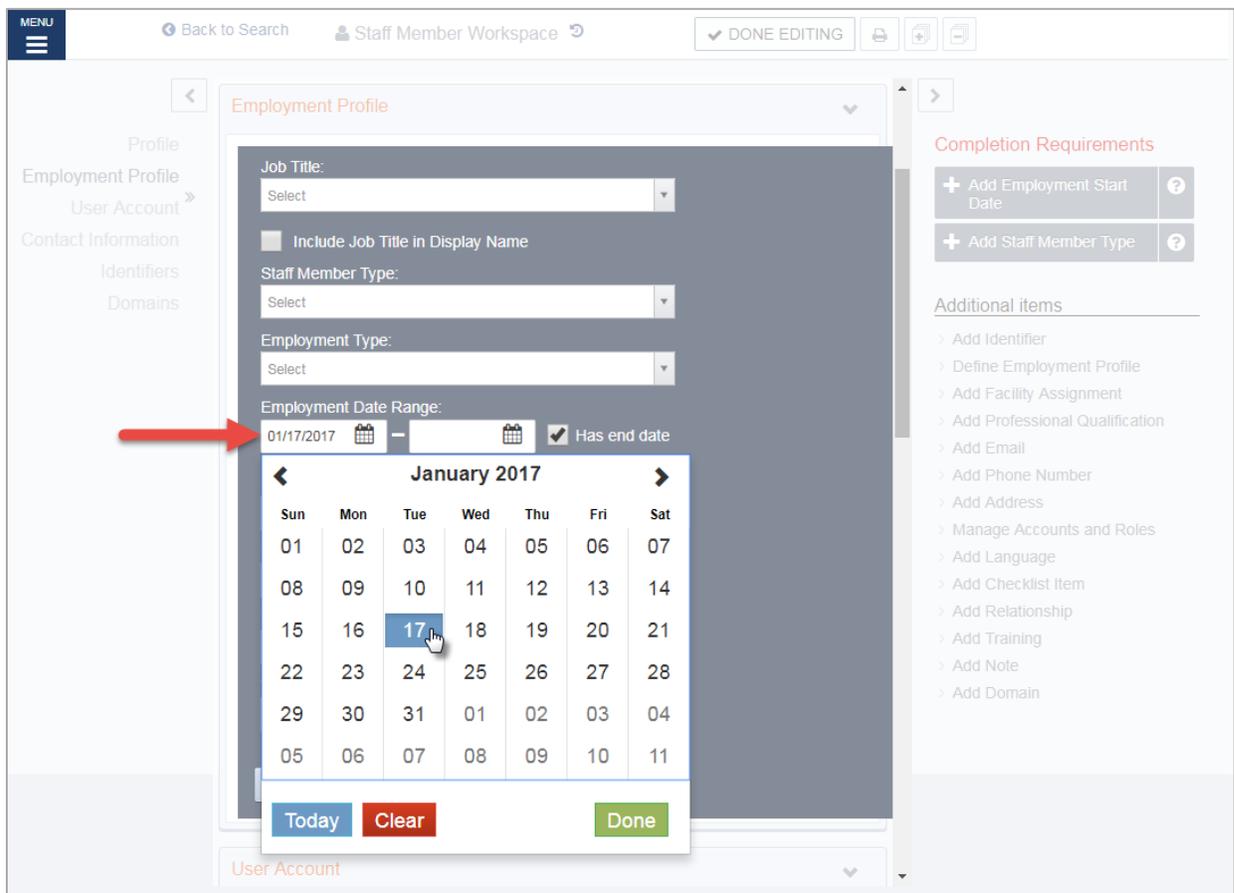


Figure 2-4: Employment Profile panel, Employee Date Range field

## Add Staff Member Type

10. On the Employment Profile panel, in the **Staff Member Type** field, select an option from the drop-down list or search for a value.

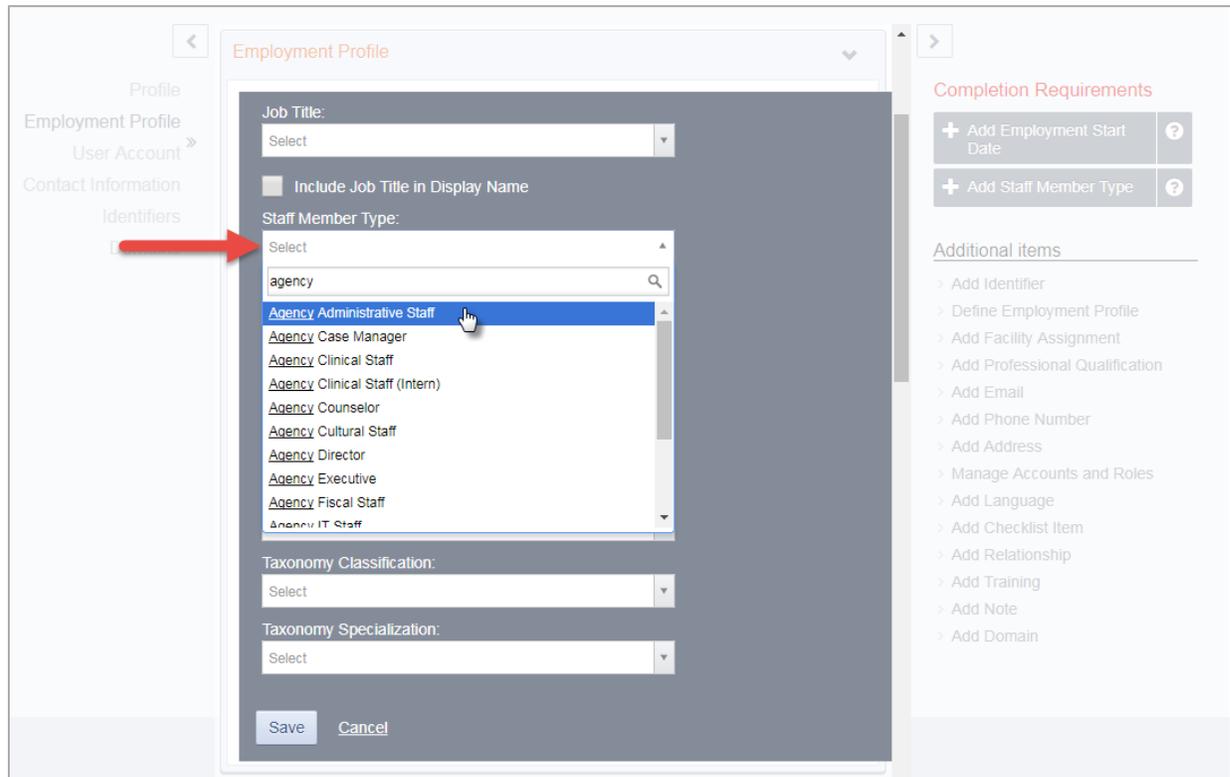
The image shows a software interface for managing an employment profile. On the left, a navigation pane lists sections: Profile, Employment Profile, User Account, Contact Information, and Identifiers. The main area is titled 'Employment Profile' and contains several fields: 'Job Title' (a dropdown menu), a checkbox for 'Include Job Title in Display Name', 'Staff Member Type' (a dropdown menu with a search icon), 'Taxonomy Classification' (a dropdown menu), and 'Taxonomy Specialization' (a dropdown menu). The 'Staff Member Type' dropdown is open, showing a list of options including 'Agency Administrative Staff', 'Agency Case Manager', 'Agency Clinical Staff', 'Agency Clinical Staff (Intern)', 'Agency Counselor', 'Agency Cultural Staff', 'Agency Director', 'Agency Executive', 'Agency Fiscal Staff', and 'Agency IT Staff'. A red arrow points to the search icon in the dropdown, and a mouse cursor is hovering over 'Agency Administrative Staff'. At the bottom of the main area are 'Save' and 'Cancel' buttons. On the right side, there are sections for 'Completion Requirements' with buttons for '+ Add Employment Start Date' and '+ Add Staff Member Type', and an 'Additional items' section with a list of expandable options like 'Add Identifier', 'Define Employment Profile', etc.

Figure 2-5: Employment Profile panel, Staff Member Type field

11. On the Employment Profile panel, click **Save**.

## Add Facility Assignment

PA WITS requires each staff be assigned to at least one facility so that a user context can be set when logging into the system. If the user is not assigned a Facility, the user will receive an error when attempting to add a strategy under strategy implementation and will be unable to enter services.

12. Point to the Additional items section, and then click **Add Facility Assignment**.

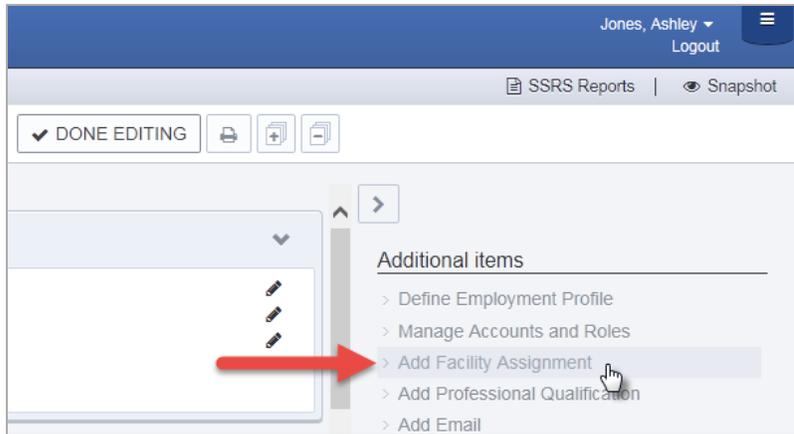


Figure 2-6: Additional Items section, Add Facility Assignment

13. In the Facility Assignments section:

- a. For SCAs: click on the first available ATOD Prevention Facility (only select one Facility). If your organization is a joinder, assign the ATOD Prevention facility for the county that is the first county in your SCA Agency's name (only select one Facility).
- b. For Providers: click on the only available Facility (will be the same as your agency name).

14. Select the **Effective Date**.



Figure 2-7: Facility Assignments panel

15. Click **Save**.

## Create User Account

Once items in the Completed Requirements sections have been met for a Staff Member, a user account can be created for the staff member. The user account will allow the staff member to log into WITS and perform various functions based on the roles granted to their user account.

16. In the **User Account** panel, click **Add Account**.

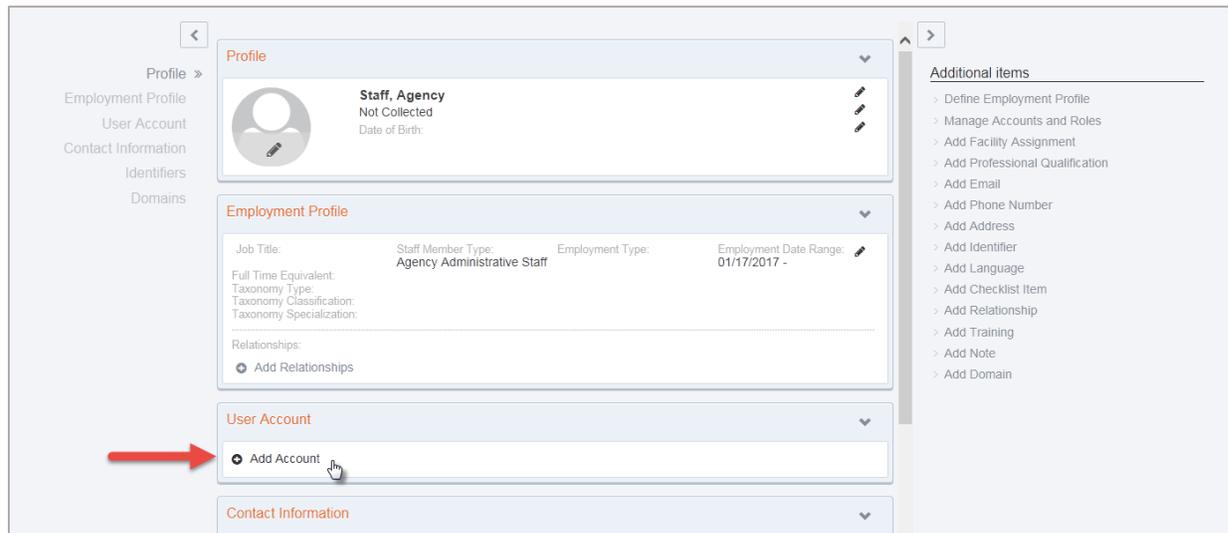


Figure 2-8: User Account panel, Add Account

17. In the **User ID** field, type the staff member's login name. **Note:** User ID must be unique for each staff member.
18. In the **Email Address** field, type the staff member's email address. **Note:** WITS will send important login information using the email address provided in this section.

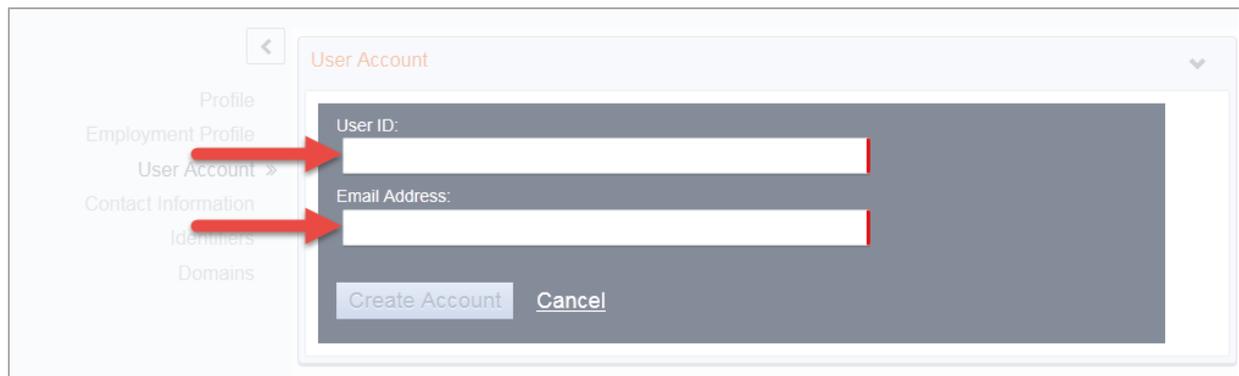


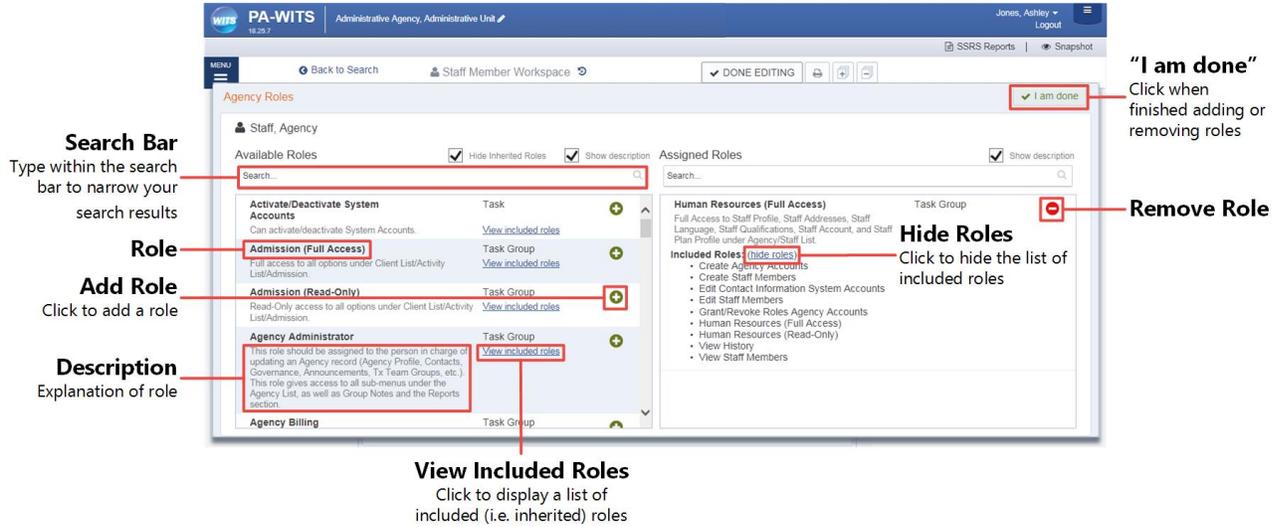
Figure 2-9: User Account panel, required fields

19. Click **Create Account**. Now proceed to the Assign User Roles section.

# Assign User Roles

## Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of **Available Roles**, while the right panel displays a list of **Assigned Roles**.



20. In the User Account panel, click **Manage roles**.

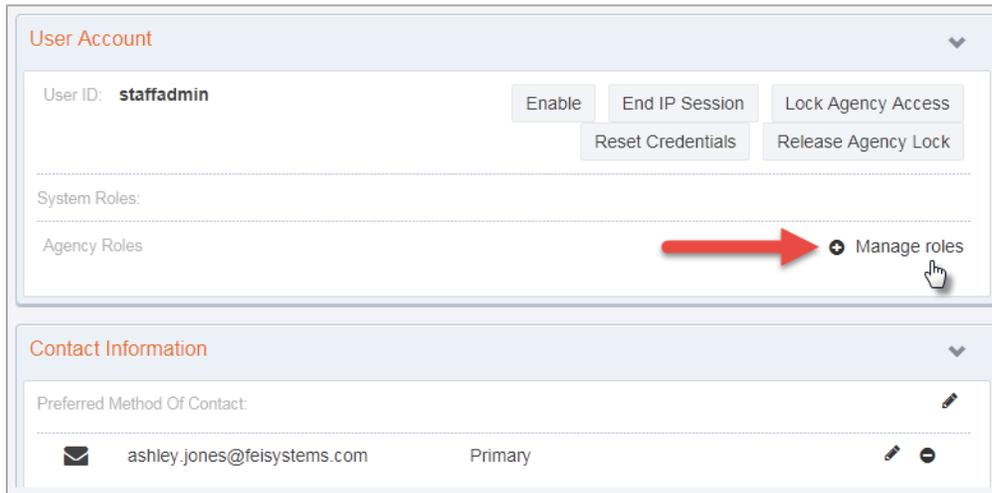
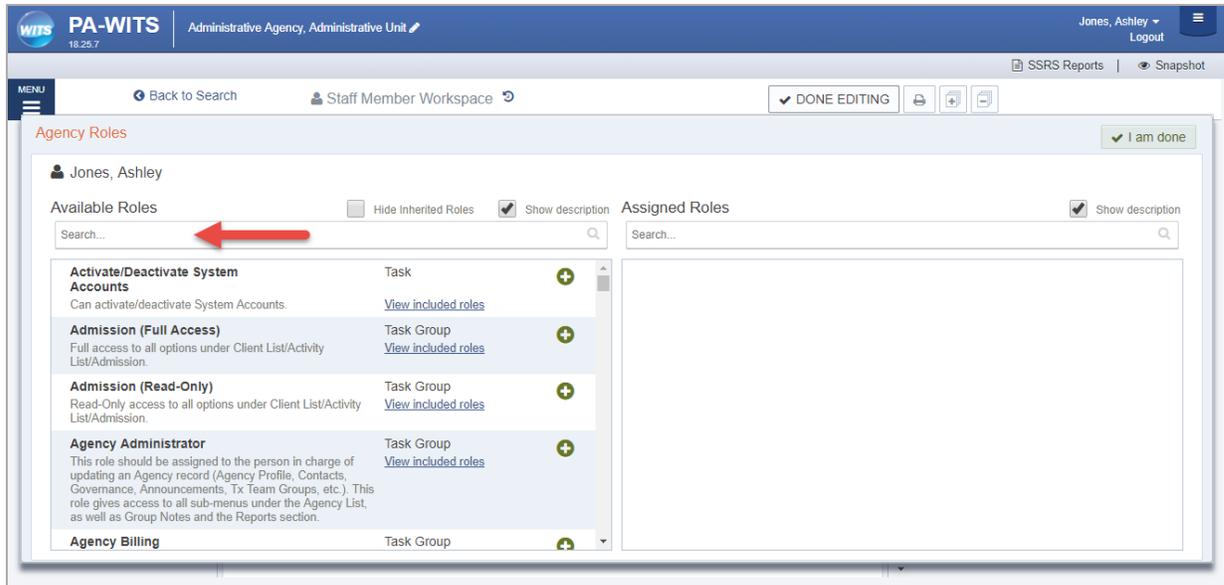


Figure 2-10: User Account panel, Manage Roles link

21. Use the **Search** bar to type the name of a role, or scroll through the list to find the correct role(s).

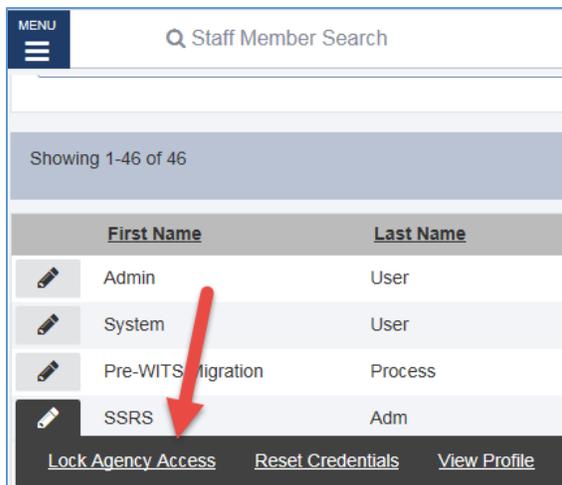


22. To add a role, click the green plus sign. To remove a role, click the red minus sign. If you are unsure what role you should assign to the staff member, please refer to the section in this guide titled "Types of Prevention Users".
23. When finished assigning roles, click **I am done**.
24. Click **Done Editing**
25. The staff member will receive an account activation email from [noreply@witsweb.org](mailto:noreply@witsweb.org). The user must click on the link in the account activation email to set their credentials within 24 hours. If the user does not set their credentials within 24 hours the account activation link will expire; if a user's link has expired see the subsection below titled "Your Reset Credentials Link Has Expired".

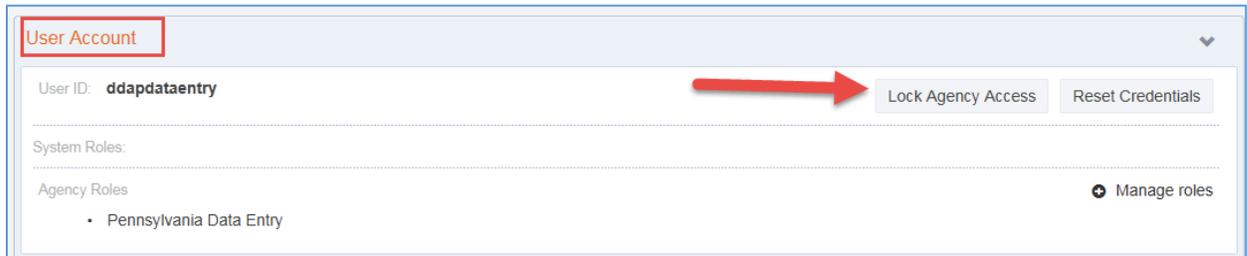
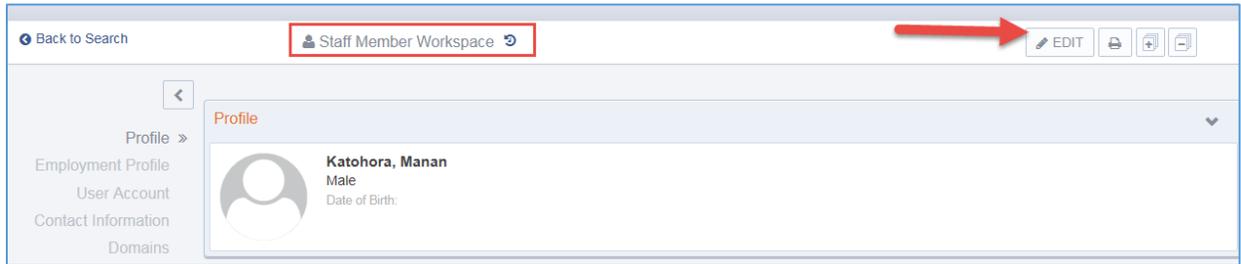
## Locking Staff Member Access

When a user's access to the system needs to be taken away for any reason, the Staff Administrator can "Lock" a user account. The Staff Administrator can reach the **Lock Agency Access** action in 2 ways.

26. From the Staff Member Search Screen, you can select the **Lock Agency Access** action from the list screen for the staff person you wish to lock.



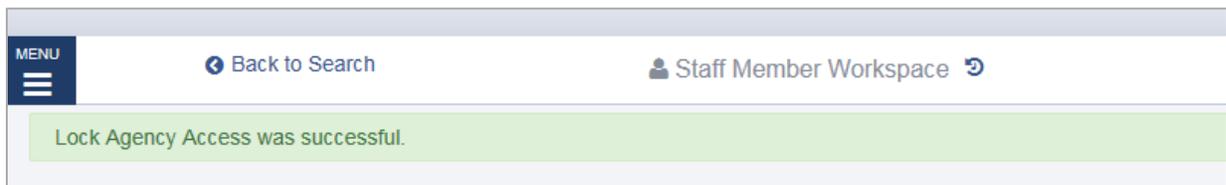
27. From within a Staff Member Workspace, the Staff Administrator can **Edit** the workspace and use the User Account panel to select the **Lock Agency Access** action.



28. When you select **Lock Agency Access** action you are required to enter a Lock Reason. Enter a reason and click Lock.



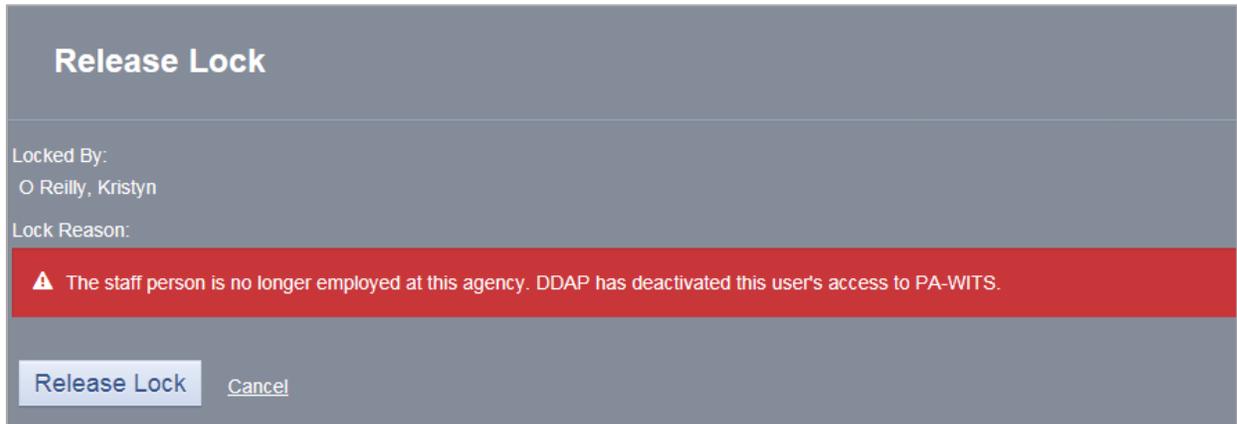
29. When you click **Lock**, the user will get Lock Agency Access was successful message at the top of the workspace.



30. This staff member can no longer gain access to PA-WITS.
31. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the Staff Member Search screen or use the Staff Member Workspace User Account panel to **Release Agency Lock**.



32. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.



33. When you click **Release Lock**, the user will get Release Agency Lock was successful message at the top of the workspace.



Figure 2-11: Release Agency Lock

## Troubleshooting

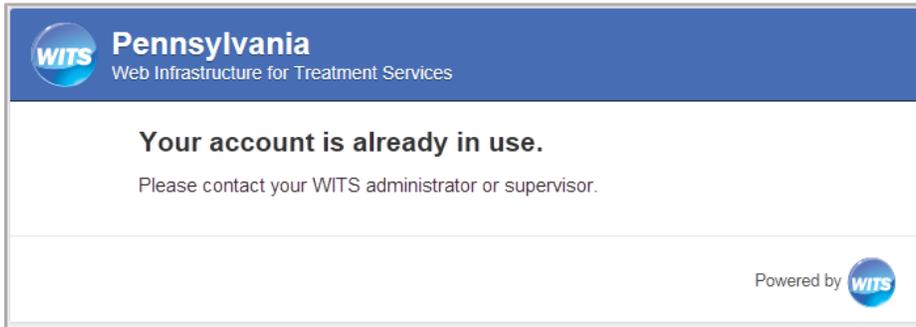
### User Account Issues

- How many login attempts are allowed?
- Your account is already in use.
- You have exceeded the maximum number of log-in attempts.
- Your reset credentials link has expired
- Correcting User ID

# How many login attempts are allowed?

Each user has **three (3)** attempts to log in with their correct password and pin.

## Your Account is Already in Use



### Solution: End IP System Session

1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **End IP Session**.

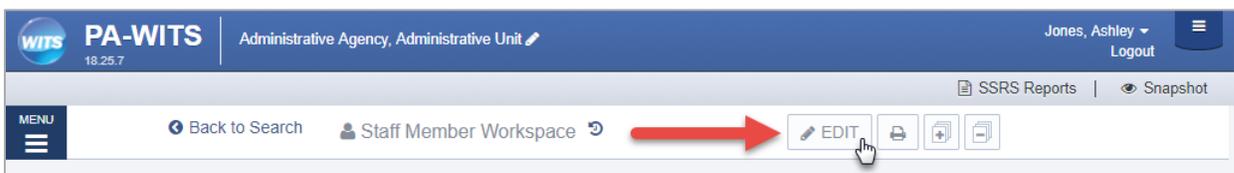


### Or (other option)

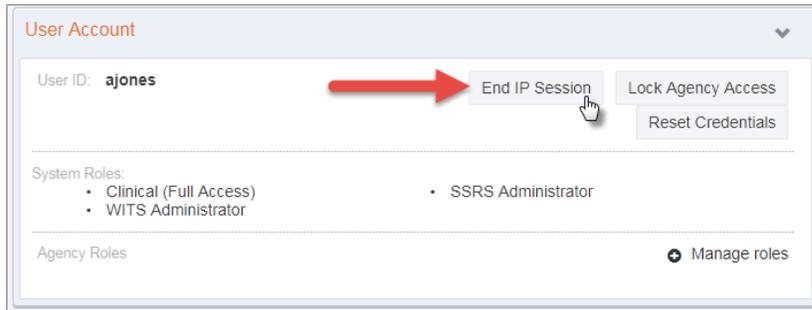
2. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.



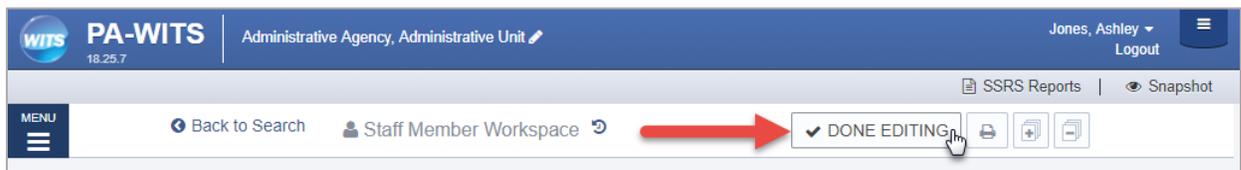
3. Click **Edit**.



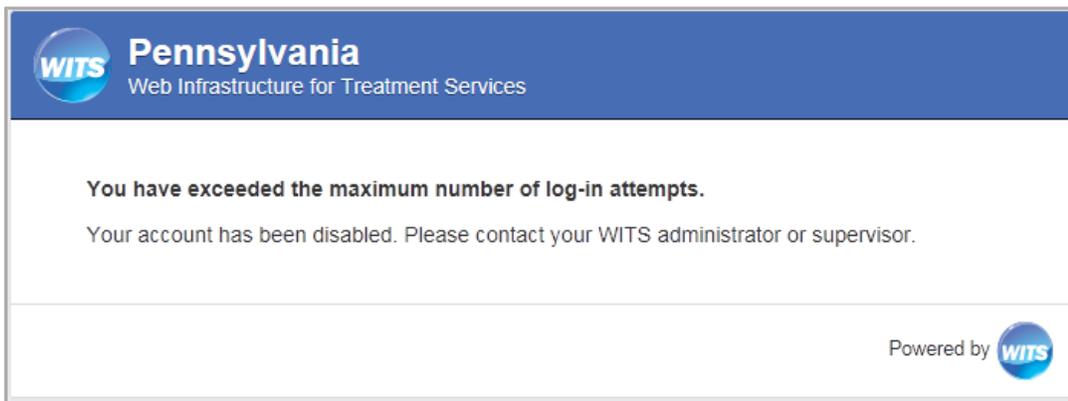
4. In the User Account panel, click End IP Session.



5. Click Done Editing.



## You Have Exceeded the Maximum Number of Log-in Attempts

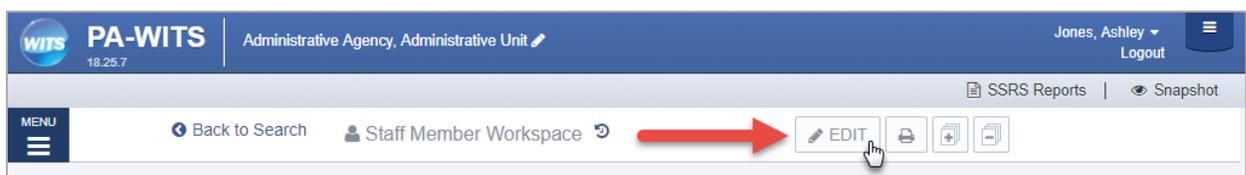


### Solution: Enable account

1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.



2. Click **Edit**.



3. In the User Account panel, click **Enable**.



## Your Reset Credentials Link Has Expired



### Solution: Reset Credentials

1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **Reset Credentials**.

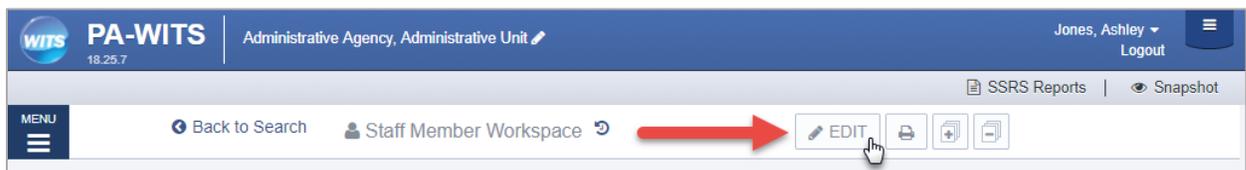


### Or (other option)

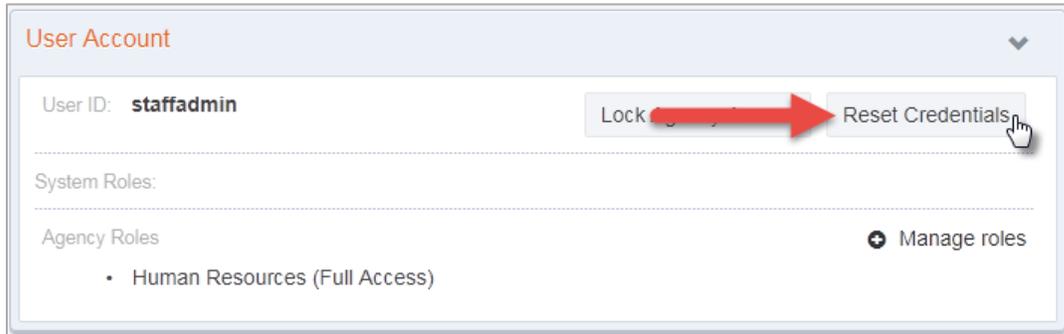
2. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.



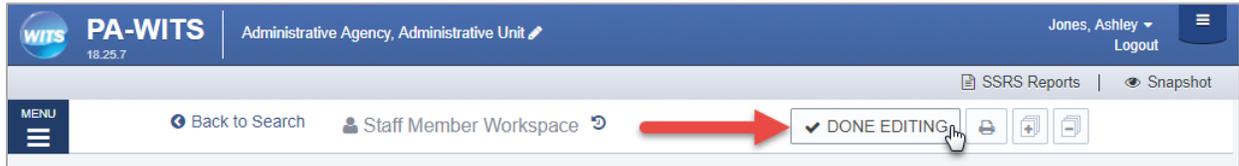
3. Click **Edit**.



- In the **User Account** panel, click **Reset Credentials**. The staff member will then receive an email containing a link to reset their credentials. **Please note this link will remain active for 24 hours**. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.



- Click Done Editing.



## Part 3: PA WITS Support Structure

### Tier 1 Support: Agency Administrator at SCA or Provider

- Be available to address user issues during normal operation hours
- Create new staff accounts, reset passwords, lock/unlock accounts, change user account permissions
- Ensure new users complete on-demand self-service training ([ddap.pa.gov](http://ddap.pa.gov))
- Have a solid understanding of WITS screens, business rules, and processes; be able to help users with any usability issue that is covered in either training manuals or user and system documentation
- Champion PA WITS at your organization
- Escalate system errors or complex issues to PA WITS Service Desk (Tier 2 Support)

### Tier 2 Support: DDAP, PA WITS Service Desk

- Available Monday-Friday, 8 AM – 4:30 PM (except on State Holidays) to answer calls or emails from SCA/Provider Tier 1 support.
- Email: [RA-DAPAWITS@pa.gov](mailto:RA-DAPAWITS@pa.gov)
- Phone: 717-736-7459
- Work with SCA/Provider agency administrator or staff member to see the issue through to resolution. Only DDAP escalates issues to Tier 3 support

### Tier 3 Support: FEi Systems

- Work with PA WITS Service Desk to resolve system defects or availability issues