Reportline Security Officer Manual

—How to Add Reportline Users Starts on Page 28—

Updated: May 17, 2017
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Reportline Overview

Introduction
The Department of Accounts (DOA) has developed a web-based system to provide access to digital reports generated by the accounting and financial management systems operated by DOA and for which Statewide users key data transactions into.

Authorized users may access Reportline using the internet at

https://reportline.doa.virginia.gov

Reportline is user-friendly and requires little intervention from outside resources. However, DOA realizes there may be some functions individuals may need assistance with and it has developed this administrative manual to guide system users.

REPORTLINE Features
Reportline provides Commonwealth of Virginia agency personnel, as well as Treasurer and Clerk of the Court locality personnel, with the means to:

- View reports **not printed remotely onsite** for **3 years** past the report run date.
- Download multiple reports simultaneously to view, print, and/or store.
- Store electronic versions of these reports on an agency-based server or individual personal computer.
- Perform searches for specific verbiage found in the electronic reports.
- Maintain agency user access internally.
- View Help pages associated with each Reportline online screen.

Database Security
State-of-the-art security features are provided to maintain confidentiality of report information.

- **Application Security**—requires a Logon ID and password for system access. Individuals will be required to keep this information confidential to provide the utmost security to Commonwealth data.

- **Secure Socket Layer (SSL)**—uses a 128-bit encryption routine to protect the data as it travels back and forth over the Internet.

- **Encrypted File System (EFS)**—is an operating system feature that protects sensitive data and prevents unauthorized access to the file directory.

Continued on next page
Reportline Overview, Continued

Access Requirements

- Browser must be enabled for Java Script.
- Browser must be enabled for Cookies.
- Browser must be enabled for Secure Socket Layer (SSL) Security (128-bit version).
- If connecting to the site from behind a firewall or proxy server, it must allow SSL (port 443) communication.
- Internet Explorer browser, version 9.01 or higher.
- Designed to be viewed at a screen resolution of 800 by 600 or greater, with a minimum of 256 colors.
- Connection speed of 56k modem (or higher) is recommended.

Security Enhancements

Reportline’s enhanced security protects sensitive information and to conform to VITA/NG security regulations. Enhanced security includes the following:

1. Requires a password phrase when making a temporary password request.
2. Passwords are case sensitive.
3. Passwords have new criteria.
4. Ability for a user to reset his password instead of requesting a temporary password—AFTER 24 HOURS.
5. Requires answering Challenge Questions for certain changes.

Web Address

http://reportline.doa.virginia.gov/

Continued on next page
Reportline Security

Security Levels

Reportline has four levels of application security.

- **Application Administrator**—DOA Database Administration personnel who establish Systems Administrator security. Reportline Application Administrators ARE able to change passwords at any time.

- **Systems Administrator**—DOA application specific (i.e., CIPPS, FAACS) personnel who establish line agency. Reportline Security Officer security. Reportline Systems Administrators ARE able to change passwords at any time.

- **Reportline Security Officer**—Line agency security officer who establishes Individual User security. Reportline Security Officers ARE able to change passwords at any time.

- **Individual User**—Line agency personnel who utilize Reportline to access electronic reports. Reportline Users ARE able to change passwords within 24 hours to maintain agency and locality report access. Details are covered below in the following topics of the REPORTLINE USER MANUAL:

  1. How to Update an Expired Password
  2. Forgot Your Password

Continued on next page
Each agency is required to identify one or more Reportline Security Officers. The Reportline Security Officer is responsible for adding, deleting, and modifying Individual User security profiles. Security access for Reportline Security Officers must be requested by completing the Reportline Request Form [NON-LOCALITY FORM FOR AGENCIES] found on DOA's Reportline website. This form is used also for individual user security setup.

THE FORM’S ACCESS LINK FOLLOWS THE FORM SAMPLE BELOW.

The Reportline Request Form must include information identifying both the agencies and the Report Families for which security will be performed.

Reportline Security Officers may be established to provide security to reports from all report families or only selected report families. (Click on the Available Reports button from the Main Menu to determine which reports are found in each "family.")

Once a Reportline Security Officer has access to provide individual security, the Reportline Security Officer also has security to view the data on these reports. Therefore, careful consideration should be given to the identification of the Reportline Security Officer based upon the information available in that Report Family.

The form must be signed by the Fiscal Officer or Agency Head identified on the Authorized Signatory card, Form DA04-121.

Route the Request Form via e-mail to:

Reportline Security Officer  
Finance and Administration Division  
Virginia Department of Accounts  
P.O. Box 1971  
Richmond, Virginia 23218-1971  
reportline@doa.virginia.gov

Continued on next page
**Reportline Security, Continued**

**Reportline Request Form**

You can access a PDF copy of the **Reportline Request Form** for Reportline Agency Security Officer and Agency Individual Users. This PDF form is located at DOA’s **Reportline** website.

![Reportline Request Form](image)

<table>
<thead>
<tr>
<th>Date</th>
<th>User Type (check one)</th>
<th>Action (check one)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Agency User</td>
<td>□ New</td>
</tr>
<tr>
<td></td>
<td>□ Agency Security Officer</td>
<td>□ Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Delete</td>
</tr>
</tbody>
</table>

**Your Agency Number**

Name
- First
- Middle
- Last

**Signature**

**E-mail Address**

**Telephone**

**Approved Agencies—List individual agency numbers**

**Report Families:** BENEFITS, CARS, CIPPS, FAACS, HEALTHCARE, LEAVE, VRS

<table>
<thead>
<tr>
<th>Report Family (See List Above)</th>
<th>Level of Security (Choose only one)</th>
<th>List Reports Here For Security Levels C or D</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ A. No reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ B. All reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ C. ONLY listed reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ D. All reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>[ ] EXCEPT listed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Use next column to list reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ A. No reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ B. All reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ C. ONLY listed reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ D. All reports for system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>[ ] EXCEPT listed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Use next column to list reports</td>
<td></td>
</tr>
</tbody>
</table>

**Authorized by:**

- Signature
- Date

**Entered by:**

- Signature
- Date

Continuation Page Attached? □ No □ Yes

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Office of the Comptroller (Rev. 5/17/17) 7 Commonwealth of Virginia
The agency Reportline Request Form is located as follows:

http://www.doa.virginia.gov/Admin_Services/Reportline/Reportline_Main.cfm

Using the Report Family Table, identify:

➢ the Report Family,
➢ level of security,
➢ and if necessary, the specific reports to which access should be granted/excepted.

Each agency is responsible for determining who is deemed appropriate to authorize requested access by Report Family. As one individual may have reason for access to more than one Report Family, *authorization* may be required by multiple employees. Similarly, as Reportline Security Officers may be limited to specific Report Families, establishment of requested security access may require *establishment* by multiple employees.
Accessing Reportline: AFTER Receiving Your Permanent Password from the DOA Reportline Administrator

Web Address  
http://reportline.doa.virginia.gov

Logon  
Perform the following steps to logon.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Access the Reportline web site:  
http://reportline.doa.virginia.gov  
This will take you to the Reportline Home Page.  
At this point, you can set a Reportline DESKTOP ICON to log in for future sessions without going through the DOA web site.  
To do this—at this Logon screen, right click your mouse; select SET AS DESKTOP ITEM.  
Enter Logon ID. |
| 2    | Enter your password. |
| 3    | Click the Logon button. |

If a correct password is entered, the Broadcast Messages page displays.

Continued on next page
Navigation buttons located in the left-hand margin of the page AND the upper, right-hand corner of the screen, link you to other Reportline pages or perform requested functions as described below.

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Files</td>
<td>Links you to the Access Files screen to obtain your DOA-generated system's reports.</td>
</tr>
<tr>
<td>Broadcast Messages</td>
<td>Links you to the Broadcast Messages screen.</td>
</tr>
<tr>
<td>Available Reports</td>
<td>Opens a new window which shows all available reports in the Reportline application. Some reports will not be available to all users due to security requirements. Also, some reports may not be turned on and you have to request that a specific report is turned on. To do this, contact your Reportline Report Family Coordinator listed at the Broadcast screen when you log in.</td>
</tr>
<tr>
<td>Help</td>
<td>Opens a new window containing information about the Reportline - Login - Help page.</td>
</tr>
<tr>
<td>Contact Us</td>
<td>(Located in the top, right corner of the screen) Links to the Contact Us page and allows you to submit questions or information to the DOA Reportline staff.</td>
</tr>
<tr>
<td>Log Off</td>
<td>Allows you to exit the system.</td>
</tr>
</tbody>
</table>

You are linked to the Broadcast Messages page for messages and other menu selection items.
Accessing Reportline: AFTER Receiving Your Permanent Password from the DOA Reportline Administrator, Continued

Invalid Log On

When you enter an invalid Logon ID, you will see the error message in red ink:

Suspended Account

After 5 (five) failed logon attempts, the following message is displayed:

Welcome to Reportline!!

Enter your User ID and Password

User ID

Password

Invalid Password (2 Violations)

Violations are cleared in one of three ways—

1) During overnight computer processing
2) For AGENCY USERS, during the day by the Agency Reportline Security Officer
3) For LOCALITY USERS, during the day by a DOA Systems Administrator

To contact DOA, use the Contact Us button in the upper, right-hand corner of the screen to request the violations be cleared.
Accessing Reportline: AFTER Receiving Your Permanent Password from the DOA Reportline Administrator, Continued

**Contact Us Screen**

Your **CONTACT US** button—located in the upper, right-hand corner of the Reportline system screens—generates an E-mail directly to DOA.

Use this button during your workday when your Agency Reportline Security Officer is not available and for a DOA Administrator to clear your five logon attempt violations during the business day.

You can use the CONTACT US button screen for all DOA-related Reportline questions you encounter. Users are NOT to use this button to request access to Reportline.

---

**Contact Us**

*Rudy Burgess*

*Voice: (804) 225-3051*

*Email: Rudy.Burgess@doa.virginia.gov or Reportline@doa.virginia.gov*

*Fax: (804) 371-8587*

Submit

**Category: (required)**

- Technical Difficulty
- Enhancements/Suggestions
- Other

**Comments (up to 500 characters): (required)**

---

**Set Up Your Two Challenge Questions**

Before you use Reportline either as an individual user or as the agency security officer, ensure you access your PERSONAL OPTIONS record to establish answers to two Challenge Questions.

**Validate Your E-mail Address**

Ensure your e-mail address is correct in your PERSONAL OPTIONS. If this e-mail address is not present or if it is inaccurate, the system will not be able to generate automatically a temporary password to you if you request one during the FORGOT PASSWORD process.
Forgot Your Password?

**Password Change Rule**

Reportline Application Administrators, System Administrators, and Security Officers can change passwords at any time.

---

**Reportline - Forgot Password**

Enter your personal information. Key email addresses and new password notice for verification.

Challenge Questions and Answers (if already completed) do not have to be re-keyed.

PASSWORD must meet the following six requirements:

1. be at least eight characters in length
2. utilize at least three of the following four:
   - special characters ( $ ! @ # % ^ & ~ ? {} |
   - upper case alphabetical characters (A - Z)
   - lower case alphabetical characters (a - z)
   - numerical characters (0 - 9)
3. contain no spaces
4. cannot match last 24 passwords
5. cannot match assigned temporary password
6. cannot be changed more than once per day.

---

**In Reportline, when you forget your password, do the following—**

1. **Contact your DOA Agency Reportline Administrator.** Locate the contact information above under Reportline User Security -- Agency Security Officer.

2. **After you re-log into Reportline with the password the Administrator has used to reset you, you will get a message indicating that you have to create a new password.** You will be prompted to do this immediately in order to continue using Reportline because the system is programmed to give you an Expired Password error message.

3. **To change the password after you are reactivated by a security officer,** you can use one of methods **shown as separate topics in this manual** as follows:

   - ➢ **FORGOTTEN PASSWORD** (procedures follow directly below)
   - ➢ **HOW TO UPDATE AN EXPIRED PASSWORD**
   (procedures shown in a separate topic previously)

---

Continued on next page
Forgot Your Password?, Continued

If you forget your password AFTER 24 HOURS of it being established, go to the Login screen. You can also use this screen if your password has expired.

Click Forgot Password. You will go to the Forgot Password page.

At the FORGOT PASSWORD screen, enter your logon ID and press SUBMIT.

Continued on next page
Forgot Your Password?, Continued

Submit Challenge Questions

You are asked to submit answers to your previously-stored CHALLENGE QUESTIONS.

When you complete keying, click SUBMIT CHALLENGE ANSWERS.

Create New Password

Here, create a NEW PASSWORD.

Continued on next page
Forgot Your Password?, Continued

Error Message Appears If Less Than 24 Hours

If you forget your password in less than 24 hours, you get the following error message highlighted that indicates FAIL beside Item # 6. You cannot proceed with the system. (However, see below…there’s a way around this within the 24-hour period.)

Reportline - Forgot Password

Enter new personal information. Key email address(es) and new password twice for verification.

Challenge Questions and Answers (if already completed) do not have to be re-keyed.

PASSWORD must meet the following six requirements:

1) be at least eight characters in length
2) utilize at least three of the following four:
   - special characters ($ @ () & ~ + ? [ ])
   - upper case alphabetical characters (A - Z)
   - lower case alphabetical characters (a - z)
   - numerical characters (0 - 9)
3) contain no spaces
4) cannot match last 24 passwords
5) cannot match assigned temporary password

NOTE: If needed, contact the Reportline Security Officer who added you; request that your password be reset.

To continue using Reportline within 24 hours of having just created a new Password, perform the following to have your Password reset.

<table>
<thead>
<tr>
<th>If you are …</th>
<th>Then contact your …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency User</td>
<td>Agency Reportline Security Officer</td>
</tr>
<tr>
<td>Locality User</td>
<td>DOA Reportline Locality Coordinator</td>
</tr>
<tr>
<td>Reportline Security Officer</td>
<td>DOA Reportline System Administrator</td>
</tr>
</tbody>
</table>

Continued on next page
If No 24-Hour Error Message

Proceed to establish a new password. You go through the same process as you did when you created your permanent password to use Reportline.

Click **SUBMIT** when all requirements are met.

<table>
<thead>
<tr>
<th>Reportline - Forgot Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter new personal information. Key email address(es) and new password twice for verification.</td>
</tr>
<tr>
<td>Challenge Questions and Answers (if already completed) do not have to be re-keyed.</td>
</tr>
</tbody>
</table>

**PASSWORD must meet the following six requirements:**

1) be at least eight characters in length  
2) utilize at least three of the following four:  
   - special characters ($ ! @ { } & ~ + ? { } )  
   - upper case alphabetical characters (A - Z)  
   - lower case alphabetical characters (a - z)  
   - numerical characters (0-9)  
3) contain no spaces  
4) cannot match last 24 passwords  
5) cannot match assigned temporary password  
6) cannot be changed more than once per day.  

**NOTE:** If needed, contact the Reportline Security Office who added you; request that your password be reset.

<table>
<thead>
<tr>
<th>Email Address 1:</th>
<th><a href="mailto:jody.burgess@doa.virginia.gov">jody.burgess@doa.virginia.gov</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Verify Email Address 1:</td>
<td></td>
</tr>
<tr>
<td>Alternate Email Address:</td>
<td>Not Required</td>
</tr>
<tr>
<td>Verify Alternate Email Address:</td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td>Required  Password is case sensitive.</td>
</tr>
<tr>
<td>Verify Password:</td>
<td>Required  Password is case sensitive.</td>
</tr>
<tr>
<td>Password Hint:</td>
<td></td>
</tr>
<tr>
<td>Challenge Question 1:</td>
<td>Please Select</td>
</tr>
<tr>
<td>Challenge Question 2:</td>
<td>Please Select</td>
</tr>
</tbody>
</table>

Office of the Comptroller (Rev. 5/17/17)
Accessing Reportline

Logon

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Access the Reportline web site:  

https://reportline.doa.virginia.gov  

This will take you to the Reportline Home Page.  

At this point, you can set a Reportline DESKTOP ICON to log in for future sessions without going through the DOA web site.  

To do this—at this Logon screen, right click your mouse; select SET AS DESKTOP ITEM.  

| 2    | Enter Logon ID.  

| 3    | Enter your password.  

Click the Logon button.  

If a correct password is entered, the Broadcast Messages page displays.  

Continued on next page
Navigation buttons located in the left-hand margin of the page AND the upper, right-hand corner of the screen link you to other Reportline pages or perform requested functions as described below.

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgot Password</td>
<td>Links to the Forgot Password page where you can receive a ‘hint’ that you previously entered to help you remember your password, or an email containing your password.</td>
</tr>
<tr>
<td>Security Features and Access Requirements</td>
<td>Links to information on application security and access requirements that support Reportline.</td>
</tr>
<tr>
<td>Available Reports</td>
<td>Opens a new window which shows all available reports in the Reportline application. Some reports will not be available to all users due to security requirements.</td>
</tr>
<tr>
<td>Help</td>
<td>Opens a new window containing information about the Reportline - Login - Help page.</td>
</tr>
<tr>
<td>Contact Us</td>
<td>(Located in the top, right corner of the screen) Links to the Contact Us page and allows you to submit questions or information to the DOA Reportline staff.</td>
</tr>
<tr>
<td>Log Off</td>
<td>(Located in the top, right corner of the screen) Allows you to exit the system.</td>
</tr>
</tbody>
</table>
Accessing Reportline, Continued

You are linked to the Broadcast Messages page for messages and a link on the left-hand side to the MAIN MENU.
Accessing Reportline, Continued

Invalid Log On  When you enter an invalid Logon ID, you will see the error message in red ink as follows:

![Reportline Login Screen](Image)

**Enter your User ID and Password**

User ID

Password

*Invalid ID*

If you have forgotten your password click the **Forgot Password** button.

Continued on next page
After 5 (five) failed logon attempts, the following message is displayed:

ACCOUNT SUSPENDED DUE TO SECURITY VIOLATIONS

Agency logon/password violations created by you and your individual agency Reportline users are cleared in one of three ways—

4) During overnight computer processing
5) During the day by YOU, the Agency Reportline Security Officer
6) During the day by a DOA Systems Administrator

Reference this topic in the Reportline User’s Manual for guidance.

Your CONTACT US button—located at the bottom of the Reportline system screens—generates an E-mail directly to DOA.

You can use the CONTACT US button screen for all DOA-related, Reportline questions you encounter.
Broadcast Messages

The **Broadcast Messages** screen welcomes you to **Reportline**. It is used to communicate messages both globally and individually to the **Reportline** user population.

In the center of the screen is a global message intended for all **Reportline** users.

**For specific Report Families you use**, the DOA Contact’s name, E-mail, and phone number are displayed. The DOA Reportline System Manager Contact data is also available.

---

Continued on next page
Broadcast Messages, Continued

Whenever DOA posts Reportline-related personal (individual) or special messages, you will find a **VIEW** button only when these messages have been posted. Click this button to view the message.

Informational messages may appear in the bottom, left-hand corner to provide feedback regarding actions which you have been taken such as login successful or you have special messages pending to be read.

Continued on next page
Broadcast Messages, Continued

Navigation buttons located at the Broadcast Messages screen link you to other Reportline screens or perform requested functions as described below.

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEW Special Announcements</td>
<td>If a special announcement is available for viewing, this button displays. Additionally, the informational message &quot;There is a Special Announcement&quot; appears in the bottom left corner of the Broadcast Message page. Links the user to the Special Announcement page and displays additional global announcements directed to all</td>
</tr>
<tr>
<td>Personal Messages</td>
<td>If a personal announcement is available for viewing, this button displays. Additionally, the informational message &quot;You have personal messages&quot; appears in the bottom left corner of the Broadcast Message page. Links the user to the Personal Messages page and displays notices solely for the individual Reportline</td>
</tr>
<tr>
<td>Main Menu</td>
<td>Links the Main Menu page.</td>
</tr>
<tr>
<td>Log Off</td>
<td>Returns the to the Logon page and signs you out of Reportline.</td>
</tr>
<tr>
<td>Help</td>
<td>Links you to the Help screen.</td>
</tr>
</tbody>
</table>
Special Announcements & Personal Messages from DOA

The Special Announcements page communicates global messages to the Reportline user population.

Read the announcement by clicking VIEW to the left of the message. After reading the message, click DELETE to remove the message.

Broadcast Messages

WELCOME TO REPORTLINE
CARS—Hope.Broughman@doa.virginia.gov / (804) 692-0218
FAACS & LAS—Sandra.Muir@doa.virginia.gov / (804) 786-0072
CIPPS & Leave—Cathy.McGill@doa.virginia.gov / (804) 371-7800
Courts & Treasurers CARS Reports—Donna.Rabender@doa.virginia.gov / (804) 225-3063
DOA Contact—Reportline@doa.virginia.gov—Rudy Burgess (804) 225-3051

Each State agency should have a designated Reportline Security Officer to add new or assist users.

You have personal messages.
Personal Messages

The Personal Messages page communicates messages intended solely for the individual Reportline user logged on.

Remove a message by clicking DELETE shown to the left of the Date.

An informational message displays stating the message has been deleted.

Undeleted messages are deleted automatically within thirty days.
Establishing Individual Security

Successful Login

A successful Logon brings you to the Broadcast Message page.

Broadcast Messages

WELCOME TO REPORTLINE
CARS—Hope.Broughman@doa.virginia.gov / (804) 692-0218
FAACS & LAS—[Sandra Muir] Sandra.Muir@doa.virginia.gov / (804) 786-0072
CIPPS & Leave—Cathy.McGill@doa.virginia.gov / (804) 371-7800
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DOA Contact—Reportline@doa.virginia.gov—Rudy Burgess (804) 225-3051

From here, click on Main Menu.

Continued on next page
Establishing Individual Security, Continued

Main Menu Screen

Your Main Menu Screen gives you all Individual User screen capabilities, PLUS the Utilities/Security button.

Welcome RUDY B BURGES!

Please select one of the options on the left menu.

Continued on next page
Establishing Individual Security, Continued

Utilities/Security Button & Screen Functions

As a Security Officer, the Utilities/Security button is available to you at the Main Menu screen.

As a Reportline Security Officer, you can do three things:

1) **Add, update, and delete individual agency user record security**; this is the agency’s responsibility.

2) Use the Administrative Reporting screen to view your agency security records to review who has what Report Family access, along with security data for all of your agency individual users.

3) **Delete your agency user logon violations during the workday** instead of waiting for overnight processing for violations to clear or contacting DOA personnel during normal working hours to delete password violations.

REPORTLINE

UTILITIES /SECURITY Screen Functions

ADD / UPDATE / DELETE SECURITY

ADMINISTRATIVE REPORTING

VIEW / DELETE LOGON VIOLATIONS

Continued on next page
Establishing Individual Security, Continued

How To Add a New Security Record

At the Utilities/Security screen, click ADD / UPDATE SECURITY.

Initially, your security record is the default and displays.

To add a new security record, click the Add New Record button.

Continued on next page
Establishing Individual Security, Continued

The ADD NEW RECORD-SECURITY screen displays for you to fill in.

**Complete the Individual Security Profile**

Complete the individual user’s security profile by providing the following:

1. User ID (must be 5 to 8 character)
2. User Agency
3. First Name, Middle Initial, and Last Name
4. Password (must be 5 to 9 characters)
5. Security Level (Individual User)
   Check all agency numbers for which the Individual user has been authorized.

Note: Other fields display, but are uneditable by the Agency Security Officer.
Review your entries to proofread your keyboarded entries. Revise if needed and then click ACCEPT.

Continued on next page
Establishing Individual Security, Continued

Establishing the User’s Password

Here’s a suggestion to establish a User’s Password: key the User ID in mixed punctuation and connect it to the User’s Agency Number with the @ symbol.

Password Example: Welcome1@151

Ensure the first letter is capitalized. This set-up meets security standards for Reportline. If you goof, the system will let you know what you did correctly and what needs attention.


The message "Record Added" displays.

However, the employee has not been granted access to reports.

When you scroll down the User’s security screen, you will now see it has expanded to include REPORT SECURITY.

For EACH Report Family you are to give security access, click EDIT next to the appropriate Report Family name. A sub-screen will load in with the Report Family name, along with radio buttons for the action you need to take.
Establishing Individual Security, Continued

Report Family Screens for Access Setup

Here is an example of the CIPPS Report Security screen:

Only REPORT FAMILIES for which the Security Officer has been granted access are available for choosing.

Click **EDIT** next to the respective REPORT FAMILY that the individual user is to access. The Report Family screen appears.

At the **Report Security** screen, click the radio button that applies to the level of the security requested for the individual. For **ONLY** and **EXCEPTION** reports, scroll down to the Report Family list and place a check mark beside the Report ID and Name.

Click **Accept**.

Continued on next page
Establishing Individual Security, Continued

Adding Report Families

The message "Record Updated" displays.

The SECURITY TYPE field updates.

Repeat the Report Family EDIT step for each Report Family requested.

Contact Your Reportline Agency User

After you have set up the user record, you can verify its accuracy by using the ADMINISTRATIVE REPORTING screen within UTILITIES/SECURITY.

See USING THE ADMINISTRATIVE REPORTING SCREEN section that follows for instructions on how to access a preview of who has what at your agency.

Communicate the Logon ID and Password to the user, informing him of the Reportline User Manual located at DOA’s Reportline Home Page:

http://reportline.doa.virginia.gov

Let the user know this manual is used to learn how to
  1) access reports and
  2) navigate screens.
Using the Administrative Reporting Screen

Introduction

You have access to an administrative reporting feature to assist you.

This screen gives you a quick snapshot of your agency’s Reportline profile.

<table>
<thead>
<tr>
<th>Agency or Locality</th>
<th>Logon ID</th>
<th>Name</th>
<th>Last Accessed</th>
<th>App Security Level</th>
<th>Authorized Agencies/Reports</th>
</tr>
</thead>
</table>

Access the Administrative Reporting Screen

From Main Menu, click UTILITIES / SECURITY.

Click ADMINISTRATIVE REPORTING.

Use the pull down menus for AGENCY and REPORT FAMILY to make your selection. To show everyone, let it default to ALL for both fields.

Click VIEW.
How to Update or Delete an Individual User’s Security Record

Introduction
You can revise or delete your agency’s Reportline users if you have the Report Family security. These functions are located at the UTILITIES/SECURITY screen.

Update/Edit a User Record
When you open the UTILITIES/SECURITY screen, the record defaults to YOURS. Thus, the first thing you need to do is to enter the USER ID and then click VIEW RECORD.

When the User record appears, click EDIT THIS RECORD.
How to Update or Delete an Individual User’s Security Record, Continued

Accept or Cancel the Edit

Once you have made your changes, if you decide to retain the revisions, click ACCEPT.

Click CANCEL if you do not want to activate the edit you entered.
How to Update or Delete an Individual User’s Security Record, Continued

Delete a User Record

It is necessary to delete a Reportline User record especially when the employee has terminated with your agency. This is a simple process.

From the MAIN MENU, select UTILITIES/SECURITY:

When you open the UTILITIES/SECURITY screen, the record defaults to YOURS. Thus, the first thing you need to do is to enter the USER ID and then click VIEW RECORD.

When the User record appears, click DELETE THIS RECORD.

Continued on next page
Delete Warning Screen Appears

You receive a warning to ensure the record you are about to delete is the correct record to be deleted.

Delete Reportline Security Record

---

**Are you sure you want to delete the following record?**

<table>
<thead>
<tr>
<th>User ID:</th>
<th>BURGESS2</th>
<th>User Agency:</th>
<th>151</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>---------</td>
<td>Hint:</td>
<td></td>
</tr>
<tr>
<td>User Name:</td>
<td>Rudy Burgess</td>
<td>Email Address 1:</td>
<td><a href="mailto:rudy.burgess@doa.virginia.gov">rudy.burgess@doa.virginia.gov</a></td>
</tr>
<tr>
<td>Email Address 2:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Accept or Cancel the DELETE Action

Verify the record on the screen is the correct record you want to delete.

Click ACCEPT or CANCEL.

If you ACCEPT the deletion, the system will give you a message stating that the record has been deleted. This message appears atop YOUR record information when the system returns after deleting the record.
How To Delete Logon Violations

**The Steps**

As a Reportline Security Officer, you can delete logon violations for both you AND your users. Although logon violations (five in one day knock you out of the system) are reset overnight, these can be cleared by an agency Reportline Security Officer or by a DOA Reportline Administrator.

From MAIN MENU, select UTILITIES/SECURITY.

Click VIEW/DELETE LOGON VIOLATIONS.

A list of your agency’s user logon violations appears.

Click DELETE ALL VIOLATIONS.

Click ACCEPT.

The system returns with zero records showing for logon violations.
How To Request a TEMPORARY Password to Establish Your Permanent Password

Perform the following steps to receive a TEMPORARY password. To do this, you will NOT log in; INSTEAD, you will click FORGOT PASSWORD.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access the Reportline website (see above). At the Login screen, you can set a Reportline DESKTOP ICON to log on for future sessions without going through the DOA web site. To do this, right click your mouse; select SET AS DESKTOP ITEM or CREATE SHORTCUT.</td>
</tr>
</tbody>
</table>
| 2    | You have to receive a TEMPORARY password from the Reportline system E-mailed so you can create your PERMANENT password. **IMPORTANT**

- Do NOT enter data in USER ID or PASSWORD fields.
- Instead, click FORGOT PASSWORD.

**Continued on next page**
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>At the FORGOT PASSWORD screen, enter your USER ID and click SUBMIT.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Reportline Screen" /></td>
</tr>
<tr>
<td>4</td>
<td>Next, enter your E-Mail Address; click SEND.</td>
</tr>
</tbody>
</table>

Continued on next page
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Enter a TEMPORARY PASSWORD PHRASE (no special characters required). <strong>Remember this phrase or make a note because you need it later.</strong></td>
</tr>
</tbody>
</table>

Reportline — Forgot Password

Enter a personal Password Phrase (any word or phrase of your choosing up to 24 characters).

Submit

You will be required to provide this Password Phrase when using your temporary password to access Reportline for the first time.

6

NOTE

Reportline uses the E-mail address in your Reportline security record. If you do NOT receive an E-mail message with the temporary password, have your REPORTLINE AGENCY SECURITY OFFICER verify your E-mail address for accuracy in your security record.

The following message is for a User ID **not** in Reportline. See your REPORTLINE AGENCY SECURITY OFFICER.

Reportline - Forgot Password

There are no matching records for User ID bbbbb.

A temporary password cannot be assigned.

7

The system-generated, E-mail is sent to your In-Box and contains a unique, temporary password.

*** THIS RESPONSE IS BEING SENT AUTOMATICALLY, PLEASE DO NOT REPLY TO THIS EMAIL ***

Per your request, your TEMPORARY REPORTLINE PASSWORD is: N3Aa3P6

Please note this Password is case sensitive.

Continued on next page
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

8. Once you receive the temporary password and you have NOT timed out of Reportline, you can remain at this Reportline screen and click REPORTLINE LOGON to re-enter Reportline.

Otherwise, you need to access the Reportline logon screen.

9. Note

You can COPY the temporary password from your E-mail and PASTE it directly into the Password field at the Reportline Login screen. This helps prevent making a keying error.

At the Reportline Login screen, enter USER ID and the TEMPORARY PASSWORD which is case sensitive. It has to be entered exactly as it appears in the E-mail.

Click Log On.

Continued on next page
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

10. At the following screen—
   
a) Re-enter the TEMPORARY PASSWORD E-mailed to you.
   b) Enter the Password Phrase you keyed earlier when you requested the temporary password.
   c) Click SUBMIT.

11. The next setup screen is organized into three areas as follows:
   1) E-mail Address verification
   2) Password
   3) Challenge Questions

Continued on next page
### How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td><strong>E-Mail Verification</strong>&lt;br&gt; Your E-mail address appears in the first field. If this entry is not correct, delete it and key your correct E-mail address. <strong>In VERIFY EMAIL ADDRESS 1 field, rekey your E-mail address.</strong></td>
</tr>
<tr>
<td>12</td>
<td><strong>Password</strong>&lt;br&gt; For your convenience, the <strong>RULES</strong> for a Reportline Password are provided on this screen.&lt;br&gt;&lt;br&gt; <strong>First, familiarize yourself with the six requirements.</strong>&lt;br&gt;&lt;br&gt; <strong>Highlights</strong>&lt;br&gt; □ Password is case sensitive.&lt;br&gt; □ Password cannot be changed <strong>BY YOU</strong> more than once per 24 hours (Rule # 6) unless it is reset by the Agency Security Officer or a DOA Administrator.&lt;br&gt; □ Password expires every 90 days.&lt;br&gt;&lt;br&gt; Enter a password. Verify the password by keying it again in the <strong>VERIFY PASSWORD</strong> field. Key a PASSWORD HINT.</td>
</tr>
<tr>
<td>13</td>
<td><strong>Challenge Questions</strong>&lt;br&gt; Use the drop-down boxes to select both Challenge Questions and key your response beside each question.&lt;br&gt;&lt;br&gt; <strong>Responses are case sensitive. Please remember this.</strong></td>
</tr>
<tr>
<td>14</td>
<td><strong>Review your entries for</strong>—&lt;br&gt; □ E-mail&lt;br&gt; □ Password&lt;br&gt; □ Challenge Questions&lt;br&gt;&lt;br&gt; Click <strong>SUBMIT.</strong></td>
</tr>
<tr>
<td>15</td>
<td>The <strong>PASSWORD REQUIREMENTS STATUS</strong> screen appears and shows what Password Requirements you meet (OK) and what requirements you did not (FAILED).</td>
</tr>
</tbody>
</table>

*Continued on next page*
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

| 16 | If you did **NOT** meet some requirements, correct your entry in the field directly on the PASSWORD REQUIREMENTS STATUS screen. Click **SUBMIT** when you have finished. |
| 17 | **When you meet all password requirements, you do NOT see a Password Requirements Status screen.** Click **SUBMIT**. |
| 18 | The following screen asks you to **CONTINUE TO REPORTLINE!** |

### Reportline Password Updated

- Your Password has been successfully updated!
- Please continue to the Reportline Application:

  ![Continue to Reportline!]

| 19 | The Broadcast Screen appears. Click **MAIN MENU** to continue using Reportline. |

### Broadcast Messages

- **WELCOME TO REPORTLINE**
  - CARS—Hope.Broughman@doa.virginia.gov / (804) 692-0218
  - FAACS & LAS—Sandra.Muir@doa.virginia.gov / (804) 786-0072
  - CIPPS & Leave—Cathy.McGill@doa.virginia.gov / (804) 371-7800
  - Courts & Treasurers CARS Reports—Donna.Rabender@doa.virginia.gov / (804) 225-3063
  - DOA Contact—Reportline@doa.virginia.gov—Rudy.Burgess (804) 225-3051

*Continued on next page*
How To Request a TEMPORARY Password to Establish Your Permanent Password, Continued

Instead, Click LOG ON button on the left-hand menu. This takes you to the login screen. Remember to enter your NEW password this time. Dots appear to guard password security; key it carefully.

Click LOG ON.

Reportline Login

Welcome to Reportline!!
Enter your User ID and Password

User ID

BURGES81

Password

**************

Log On

If you have forgotten your password click the Forgot Password button.
How to Update an Expired Password

Password Expires Every 90 Days

Your password is valid for 90 days. When it expires, the system generates the screen so you can enter a new password, along with a password hint.

Password Expires When Reset by a Security Officer

If YOU forget your password and request a DOA Reportline Security Officer to change your password, you receive an expired password message the first time you use the reset password. This is designed so you create a new password immediately to begin using Reportline.

If YOU reset an expired password for an agency user, the user receives an expired password message the first time he uses the reset password set up by you.

When YOU Reset a User’s Password

You access a user record via the UTILITIES/SECURITIES screen and you will EDIT the record. Before you edit the record, you have to enter the USER ID and click VIEW. Now, you are ready to click EDIT.

Here’s a suggestion to establish a User’s Password: key the User ID in mixed punctuation and connect it to the User’s Agency Number with the @ symbol.

Password Example: Welcome1@151

Ensure the first letter is capitalized. This set-up meets security standards for Reportline. If you goof, the system will let you know what you did correctly and what needs attention.

Continued on next page
How to Update an Expired Password, Continued

Screen

The EXPIRED PASSWORD screen lists the Password rules to establish your password which has six (6) requirements.

Once you complete the three fields, click SUBMIT in the upper, left-hand corner.

---

**Expired Password**

Submit

---

Your password has expired. Please enter a new password twice for verification.

**PASSWORD must meet the following six requirements:**

1) be at least eight characters in length
2) utilize at least three of the following four:
   - special characters ($ ! @ # % & * ( ) + - _ ? { ]}
   - upper case alphabetical characters (A - Z)
   - lower case alphabetical characters (a - z)
   - numerical characters (0 - 9)
3) contain no spaces
4) cannot match last 24 passwords
5) cannot match assigned temporary password
6) cannot be changed more than once per day

**NOTE:** If needed, contact the Reportline Security Officer who added you; request that your password be reset. Provide the most recent password you need re-keyed.

---

Password: ?
Verify Password: 
Hint: 

---

Continued on next page
How to Update an Expired Password, Continued

Password Is Correct or Not

The system lets you know if you succeeded or not to create a permanent password to satisfy the six (6) requirements.

PASSWORD and VERIFY PASSWORD fields are blank should you need to try it again.

If you need to try again, enter the password and verify it. Click SUBMIT again.

Password must meet the following six requirements:

1) be at least eight characters in length
2) utilize at least three of the following four:
   - special characters { $ ! @ {} & - + ? [ ] }
   - upper case alphabetical characters (A - Z)
   - lower case alphabetical characters (a - z)
   - numerical characters (0-9)
3) contain no spaces
4) cannot match last 24 passwords
5) cannot match assigned temporary password
6) cannot be changed more than once per day.

NOTE: If needed, contact the Reportline Security who added you; request that your password be re

Password Updated

The following screen confirms you have a correct password and you are ready to resume in Reportline.

Reportline Password Updated

Your Password has been successfully updated!

Please continue to the Reportline Application:
How to Update an Expired Password, Continued

Broadcast Screen Appears Next

The Broadcast Screen appears. Click MAIN MENU to continue using Reportline.

Broadcast Messages

WELCOME TO REPORTLINE
CARS—Hope.Broughman@doa.virginia.gov / (804) 692-0218
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DOA Contact—Reportline@doa.virginia.gov—Rudy Burgess (804) 225-3051

DOA Contact

Contact Us Button

Use Reportline’s Contact Us button for assistance.

DOA Staff

After you log in, reference your Broadcast screen for names of DOA staff members who can assist you with Reportline.

(ReportlineSecurityOfficerManual (May 9 2017).doc)