



Client Services Network v4.0

Administrator's Manual

Revised: 11/26/2007

Table of Contents

Accessing CSN	3
First Time Login Procedures	3
Regular Login Procedures	4
Change Login Password / Reset Login Password	5
Things to Remember about Passwords	5
Agency and Workgroup Selection	6
CSN Workgroup Home Page	7
Search Screens	7
Search Results	7
Menus and Buttons	8
Menu Bar	8
Screen Administration Buttons	8
Edit Lists	9
Screen Instructions	10
UserManager	11

Agency List	11
User List	11
User Account Details	12
Reset Password	12
Adding or Editing User Accounts	13
Program Permissions	14
WorkgroupManager	15
Adding, Editing, and Moving Workgroups	15
Adding and Editing Menu Items	16
Adding and Editing Submenu Items	17
Changing Sort Order	17
FormsManager	18
FormsManager Menu and Screen List	18
CSN Table Types	18
Adding New Data Tables	19
Adding New List Tables	20
Editing Screen/Page Information	21
Field Summary	22
Changing Sort Order	22
Editing Field Information	23
Adding New Fields to Table	23
Accessing Existing Pages	24

Accessing CSN

First Time Login Procedures

After accessing the CSN website, you will see the screen below.

Click on Login. The Login screen will appear.

Click on the User ID box. Type your User ID into the box.

Click on the Password box. Type the word, **PASSWORD**, into the Password box.

Click on the SUBMIT button.

The next screen you will see asks you to Change (original) Login Password.

User ID:

Password:

Passwords must be at least eight (8) characters in length and contain at least three of the following character types:

Type 1: Upper case letters

Type 2: Lower case letters

Type 3: Numbers

Type 4: Characters (!@#%&^*?~)

Old Password:

New Password:

Verify New Password:

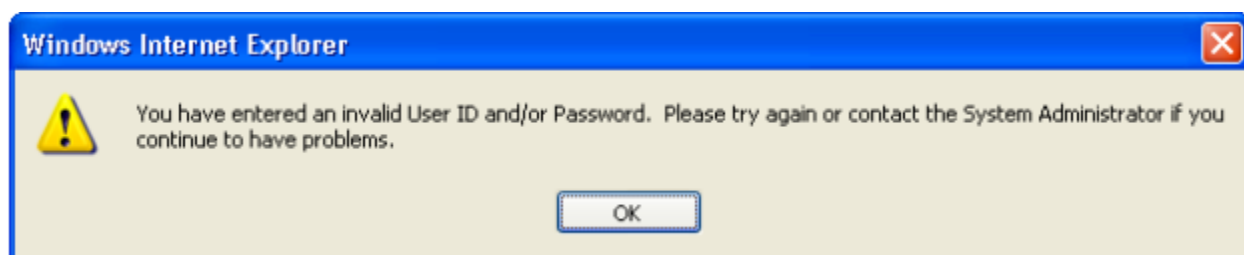
Submit

Cancel

Regular Login Procedures

After you have logged in for the first time and changed your password, you simply follow steps 1 – 4 above (using your new password) to use the CSN application.

If your password is NOT accepted, you will see the message below. Click on the OK button. Repeat steps 1 - 4 above. The account is automatically locked out after three (3) unsuccessful attempts.



Change Login Password / Reset Login Password

Click on the Old Password box. Type in **PASSWORD**.

Click on the New Password box. Type in your new password. Passwords MUST be at least eight (8) characters in length and must contain at least three (3) of the following character types:

Upper case letters

Lower case letters

Numbers

Characters !@#\$%^&*?~()

When the minimum requirements are met, the password test notice will change from **Unacceptable** to **Acceptable**. If the password uses all four (4) character types, the notice changes to **Strong**.

Click on the Verify New Password box. Type in the same new password.

Click on the Submit button.

If your password is accepted, you will advance to agency and workgroup selection screen.

Passwords must be at least eight (8) characters in length and contain at least three of the following character types:

Type 1: Upper case letters

Type 2: Lower case letters

Type 3: Numbers

Type 4: Characters (!@#\$%^&*?~)

Old Password:

New Password: **Acceptable**

Verify New Password:

Submit

Cancel

Things to Remember about Passwords

Your original password is valid for 30 days. You must login within that 30-day period and change it to a new password or it will expire.

Passwords **MUST** be at least eight (8) characters in length and must contain at least three (3) of the following character types:

Upper case letters;

Lower case letters;

Numbers

Characters !@#\$%^&*?~()

After changing your initial password, your new password will be valid for 90 days.

The system will automatically direct you to the Change Login Password screen when it is time to change your password.

Remember that your Old Password will be "**PASSWORD**" if it has to be reset by the system administrator.

Agency and Workgroup Selection

System Administrators can select the agency and workgroup to access. After selecting the agency, the workgroup list is automatically updated. Click “Continue” to complete the login process.

Select the Agency and/or Workgroup to access:

Select Agency:

Select Workgroup:

CSN Workgroup Home Page

Search Screens

The screen below is the first one you will see after a valid login. The items on this screen are added in the WorkgroupManager under the “Home” button and can be Search or Summary screens. Below are two different types of Search screen. The first allows the end user to enter information to filter on each field. When the “Search Now” button is clicked, the Search Results screen below is displayed. The second Search screen provides a hyperlink directly to the file as the search criteria is preset, such as showing only the active clients for the current user.

Client Search

Enter search criteria in one or more of the fields below then click the "Search Now" button.

(*) Required Fields

First Name (max 5 characters)	
Last Name (max 5 characters)	
SS Number (whole SSN only)	
Date of Birth (enter as mmddyy; system will auto format)	
Program (leave blank to search all available records)	Select...

Active Clients for Current User

Client Name	Program	Date Entered	Does client have expired or expiring releases?
Hudapr, Test	Management System	10/31/2007	No

Search Results

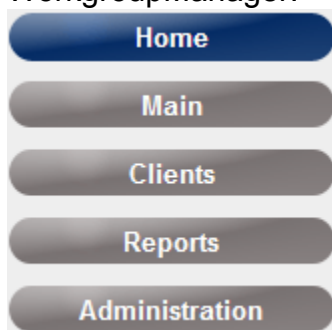
Each line is a hyperlink to the file. When the cursor is moved over a line it is hi-lighted. To enter new search criteria, click on “New Search”. To add a new file, click on “Add”.

Print View All d i Add New Search				
Select link below to open file or click the "Add" button to add a new entry.				
First Name	Last Name	SS Number	Date of Birth	Program
Test	Another	5555	11/20/1990	
Test	Hudapr	0000	2/2/1964	Management System

Menus and Buttons

Menu Bar

The menu bar to left provides access and permissions to application screens. The primary menu buttons only appear when a workgroup has access to screens in that menu. However, the Administration menu is only accessible by System and Agency Administrators. Menu items for workgroups are administered via the WorkgroupManager.



To expand or collapse a menu, click the menu button!

Each primary menu displays additional menu items when expanded. Any menu item with a  (down arrow) has additional sub-menu items that are displayed when the item is selected.



Screen Administration Buttons

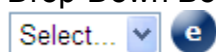
These buttons open the associated administration item in a new window for easy editing.

-  FormsManager for current screen
-  Edit list for current field
-  View/edit instructions for current screen

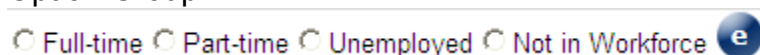
Edit Lists

All items for drop-down boxes and option groups are managed by the System and Agency Administrators. To edit the corresponding list from an Add/Edit screen, click on the corresponding “e”. The list is opened in a separate window.

Drop-Down Box:



Option Group:



Each list has a Sort Order, Code, Description, Category, and Inactive field. The lists are sorted by the Sort Order then Description fields. The value in the Code field is what is stored when the item is selected and once set can not be changed. The Description field is displayed on the screen. The Category field is used to group the individual items for reporting or displaying. The Inactive field when checked prevents the item from being displayed as an option but retains it for reporting purposes.

	Sort Order [™]	Code [™]	Description [™]	Category	Inactive	Manage
	0				☐	Save
11	0	Full-time	Full-time			Edit Delete u
12	0	Part-time	Part-time			Edit Delete u
13	0	Unemployed	Unemployed			Edit Delete u
30	0	Not in Workforce	Not in Workforce			Edit Delete u

Screen Instructions

Field specific instructions can be added to each screen and is specific to each agency. Therefore, even though two agencies are using the same screen each can have their own specific instructions. The input boxes automatically expand as text is entered and allows up to 1000 characters per box. When the end-user views the instructions, only the text is displayed with a close button. Only System and Agency Administrators can edit the screen instructions.

Field Instructions

Title	
First	
Middle	
Last	
Suffix	
Date Of Birth	
Social Security Number	If you do not have the SSN, enter 000-00-0000 NOT 999-99-9999!
Gender	
Race	
Ethnicity	
Date Of Death	

UserManager

Agency List

User logins and permissions are administered in the UserManager and are accessed from the Administration menu. The UserManager opens in a new browser window. The first screen shows a list of agencies. System Administrators can access the users for all agencies via the “User List” button. Agency Administrators will only see the “User List” button for their agency.

Close		
Agency ID	Agency Name	View User List
DEMO	Demonstration Agency	User List
TEST	Test Agency	User List

User List

The following screen shows a list of all user accounts for the selected agency. To edit a user account, click the “Details” button. To add a new user, click the “Add” button (see “Adding and Editing User Accounts”). The “Back” button returns to the Agency List and the “Close” button closes the browser window. ***The “Reset All Passwords” resets the***

password for ALL user accounts for the selected agency and is available to System Administrators only!

Add	Print	<<< Back	Close	Reset All Passwords
-----	-------	----------	-------	---------------------

User Name	User ID	User Status	Last Access Date	View User Details
User, Test	TUSER	User	9/29/2007 9:52:42 AM	Details

User Account Details

The following screen controls the system access rights for the selected user account. To edit an account, click the “Edit” button. To delete a user account, click the “Delete” button. To manage the agency program permissions, click the “Programs” button. The “Back” button returns to the User List for the selected agency. The “Close” button closes the browser window.

Edit	Delete	Print	Programs	<<<Back	Close
------	--------	-------	----------	---------	-------

First Name:	Test
Middle Name or Initial:	
Last Name:	User
User ID:	TUSER
User Status:	User
Agency User Group:	HMISNow
Agency:	TEST
Phone:	
Email Address:	
Activation Date:	9/29/2007
Expiration Date:	1/10/2008 3:39:17 AM
Last Access Date:	9/29/2007 9:52:42 AM

Reset Password

Reset Password

To reset a password, click the “Reset Password” button. The password is reset to “PASSWORD”. The user will be prompted to change it during their initial login.

Adding or Editing User Accounts

The following screen allows System and Agency Administrators to add or change the selected user account. The first name, last name, user id, user status, and agency user group are all required fields. The standard for the User ID field, which the end user enters when logging into the system, is First Name Initial and Last Name up to 15 characters. The User Status controls the system-wide permissions for the account and consists of the following:

- Admin (System Administrator): allows access to all functions; can create all types of user accounts
- Agency Admin (Agency Administrator): allows access to most functions except creating new pages; can only create “User” and “Read Only” type accounts
- User: allows access on to workgroup screens; no access to any administrative functions
- *Read Only*: allows access to workgroup screens as “Read Only” regardless of permissions set in workgroup; now access to any administrative functions
- *Inactive*: no access to system; after 3 unsuccessful login attempts, user accounts are set to inactive.

The Agency User Group or Workgroup sets the items that appear on the menus and the user’s permissions for those items. (see WorkgroupManager)

First Name:	Test
Middle Name or Initial:	
Last Name:	User
User ID:	TUSER
User Status:	User ▼
Agency User Group:	HMISNow ▼
Agency:	TEST ▼
Phone:	
Email Address:	
Activation Date:	9/29/2007
Expiration Date:	1/10/2008 3:39:17 AM
Save Cancel	

Program Permissions

The program permissions screen is accessed from the User Account Details screen. It sets user's permissions for individual client programs. If the program permission is more restrictive, it overrides the Workgroup permissions. For example, a non-residential caseworker has "Add/Edit" permissions for the Non-Residential Program and "Read Only" permissions for the Residential Program. When the caseworker accesses any screen linked to the Residential Program, they will only be able to view the data even though the Workgroup has "Add/Edit" permissions. If the user has no permissions for a program, they will not be able to view any data linked to that program.

To add a program, select the program and permission from the drop-down box and click the "Add" button. Only add programs for which you want the user to have at least "Read Only" permissions. To remove a program, click the corresponding "Remove" button.

<<< Back

Program	Permission	Manage Entry
Management System ▼	Add ▼	Add

Management System	Full	Remove
-------------------	------	---

WorkgroupManager

The WorkgroupManager controls the menu items and permissions. Only the Workgroups for the current agency are shown.

Workgroups can be added by either creating a new one or copying and existing one. Workgroups in one agency can also be copied and moved to another agency!

Adding, Editing, and Moving Workgroups

Creating a new workgroup from scratch begins with adding the unique name in the “User Group” field and clicking the “Save” button. Click the “Edit Menus” button to begin adding Items to the menus. *Note: The primary menu buttons only appear when a workgroup has access to screens in that menu.*

To copy an existing workgroup, click the corresponding “Copy” button. A new item is added to the list with “-Copy” added to the User Group name. All associated menu items are also copied. To change the User Group name, click the corresponding “Edit” button. Change the name then click “Update”.

To move an existing workgroup to another agency, click the corresponding “Edit” button and change the “Agency”. Click the “Update” button to save the change. *Note: The workgroup will disappear from the list. Login to the other agency to edit the workgroup.*

Print
Add
Close

Agency	User Group	Manage Entry
DEMO ▼		Save

DEMO	Administrator	Edit	Delete	Copy	Edit Menu	User List
DEMO	HMISNow	Edit	Delete	Copy	Edit Menu	User List

Adding and Editing Menu Items

First, select the Primary Menu to edit from the buttons at the top. This will edit that menu for the selected workgroup only. To edit another workgroup, click the “Back” button and select the corresponding “Edit Menu” button. To close the browser window, click the “Close” button.

Menu items consist of two types, Single and Group. Single menu items are screens that are selected from the primary menu. Group menu items or submenus are groups of screens. When selected from the primary menu, the submenu expands and the first screen in the group is displayed.

To add a new menu item:

1. Enter the sort order. The default is the next number in the sequence.
2. Select the type, single or group. The Screen and Permission fields are disabled for Groups since these are set in the “Submenu” (see Adding and Editing Submenu Items).
3. Enter the Menu Item. This is what appears on the menu in place of the internal screen name. It allows administrators to use language familiar to the end user.
4. For Single items, select the Screen to be opened. Screens must first be created using the FormsManager.
5. Select the access permission for the selected screen. *Note: This permission can be overridden by the user status or the program permissions set in the User Account.*
6. Click the “Save” button.

To view the underlying submenu, click the “+” button for the group. To show the entire menu, click the “+All” button.

To edit a menu item, click the corresponding “Edit” button. The item appears in the top edit line. To save the changes, click the “Update” button.

The screenshot displays a web-based menu management interface. At the top, there is a navigation bar with buttons for 'Home', 'Main', 'Clients' (highlighted), 'Reports', and 'Administration'. Below this is a toolbar with 'Print', '<<< Back', and 'Close' buttons. A table header shows columns for 'Sort Order', 'Type', 'Menu Item', 'Screen', 'Permission', and 'Manage Entry'. Below the header is a form for adding a new item, with fields for 'Sort Order' (6), 'Type' (Single), 'Menu Item' (Additional Program Info (6868-All)), 'Screen' (Add), and 'Permission' (Add), followed by a 'Save' button. Below the form is a list of existing menu items, each with a 'Sort Order' field, a 'Type' field, a 'Menu Item' field, a 'Screen' field, a 'Permission' field, and 'Edit' and 'Delete' buttons. The list includes: 1. Single Client Demographics Client Demographics - 6875 Full Edit Delete; 2. Group Intake Edit Delete; 3. Group Services Edit Delete; 4. Group Exit Edit Delete.

Sort Order	Type	Menu Item	Screen	Permission	Manage Entry
6	Single	Additional Program Info (6868-All)	Add	Add	Save

Sort Order	Type	Menu Item	Screen	Permission	Manage Entry
1	Single	Client Demographics	Client Demographics - 6875	Full	Edit Delete
2	Group	Intake			Edit Delete
3	Group	Services			Edit Delete
4	Group	Exit			Edit Delete

Adding and Editing Submenu Items

Submenus are added in the same manner as menu items except there is no “Type” field.

To add a new submenu item:

1. Enter the sort order. The default is the next number in the sequence.
2. Enter the Menu Item. This is what appears on the menu in place of the internal screen name. It allows administrators to use language familiar to the end user.
3. Select the Screen to be opened.
4. Select the access permission for the selected screen. *Note: This permission can be overridden by the user status or the program permissions set in the User Account.*
5. Click the “Save” button.

To edit a submenu item, click the corresponding “Edit” button. The item appears in the edit line for that submenu NOT the top edit line. To save the changes, click the “Update” button.

The screenshot shows a web interface for managing services. At the top, there's a header with 'Group' (Services) and buttons for 'Edit' and 'Delete'. Below this is a table with columns: Sort Order, Menu Item, Screen, Permission, and Manage Entry. The table contains three items: 'Notes' (Case Notes - 6896), 'Non-Financial Services' (Non-Financial Services - 1), and 'Releases' (Releases - 15). Each item has an 'Edit' and 'Delete' button. Above the table is an 'Add' form with fields for Sort Order (4), Menu Item, Screen (Additional Program Info (6868-All)), Permission (Add), and a Save button.

Sort Order	Menu Item	Screen	Permission	Manage Entry
4		Additional Program Info (6868-All)	Add	Save
1	Notes	Case Notes - 6896	Full	Edit Delete
2	Non-Financial Services	Non-Financial Services - 1	Full	Edit Delete
3	Releases	Releases - 15	Full	Edit Delete

Changing Sort Order

To change the order of menu and submenu items, enter the *destination* line for the item to be moved in the box to the right of the Sort Order number. Click the arrow (“->”) button. The item is moved to the new line and the following items reordered automatically.

Home Main **Clients** Reports Administration

Print <<< Back Close

Sort Order	Type	Menu Item	Screen	Permission	Manage Entry
6	Single		Additional Program Info (6868-All)	Add	Save

+All

1	Single	Client Demographics	Client Demographics - 6875	Full	Edit Delete
2	Group	Intake			Edit Delete
3	Group	Services			Edit Delete
4	Group	Exit			Edit Delete

FormsManager

While the UserManager controls which screens are accessed by a Workgroup, the FormsManager controls the screen content and functionality. When selected from the Administration Menu, it is opened in a new browser window.

FormsManager Menu and Screen List

Each screen is assigned a unique PageID number when created. This PageID is used by the CSN application to create and retrieve the associated data for each screen. The FormsManage Menu (Screen List) shows all of the screens available for the selected primary menu. To view screens for other primary menus, click the corresponding button at the top of the screen.

Home		Main	Clients	Reports	Administration
Print		Add	Import Page	New Data Table	New List Table
				Close	
PageID	Title	Table	Agency ID	Type	Manage
6868	Additional Program Info	ProgramInfoAdditional	All	3	Edit Delete Copy Fields...
6896	Case Notes	Notes	All	1	Edit Delete Copy Fields...
6875	Client Demographics	Name	All	3	Edit Delete Copy Fields...

CSN Table Types

In the CSN database, there are three types of tables: Application, Data, and List. The application tables control the user accounts, menus, and administrative functions. Data tables contain the data input by the end user. List tables contain values for drop-down and option lists. These values are maintained by the System and Agency Administrators.

Adding New Data Tables

The System Administrator can add new data tables as needed. From the FormsManager Menu, click on the “New Data Table”. The following screen appears. There are three types of data tables that can be created: Primary, Secondary, and Data. Primary tables contain unique client, agency, or facility information such as client name and demographics. Secondary tables contain data, such as program or contract information, that is directly associated with a primary table and can have data tables linked to it. Data tables can have multiple entries and is linked to a primary and/or secondary table, such as services provided or contract disbursements.

The “New Data Table” function adds a new table (configured with the appropriate required system fields) to the database, creates the new screen/page, and adds the system fields to the page. To run the function:

1. Select the primary menu to which the new screen/page will be added.
2. Enter the new UNIQUE table name. Only alpha characters are accepted with no spaces.
3. The table name is automatically copied to the Page Title. The Page Title will accept spaces and numbers.
4. Select the Page Type. The default is set for “Data” as that is the type used most often.
5. The function is defaults to create a new screen/page and open it in Forms Manager for additional editing.
6. If the function is set to DELETE the existing table, then the table is first copied to the Archive database. If the table already exists, then an error occurs.

Add a New Data Table

Select Menu	Select...
Enter the Table Name:	
Page Title:	
Page Type:	☐ Primary (such as Name, Sites, Facilities) ☐ Secondary (such as Programs) ☒ Data
Create Page?	☐ No ☒ Yes
Open page in FormsManager after creation?	☐ No ☒ Yes
Delete existing table?	☒ No ☐ Yes
ContinueCancel	

Adding New List Tables

List tables are created in much the same manner as Data tables with the following exceptions:

- All List screens/pages are added to the Administration menu.
- Once created, the function opens the screen/page to add values rather than opening it in FormsManager for further editing.
- List screens have an additional type and default to “Agency Specific”. An Agency Specific list allows each agency to set different values for the list. Non-Agency Specific (or System) lists are administered only by the System Administrator and the same values are used by ALL agencies.

Add a New List Table

Enter the Table Name:		
"List" will automatically be added to the end.		
List and Page Title:		
	No	Yes
Is this an Agency Specific list?	☐	☒
Create Page?	☐	☒
Open page after creation?	☐	☒
Delete existing table?	☒	☐
Continue		

Editing Screen/Page Information

When a new Data table is created or when an existing screen/page is edited, the following page appears. The underlying table, page type (how the page is formatted when displayed), page title, and security is set.

PageID	6868
Menu	Clients
Table Name	ProgramInfoAdditional
Row Guid Field	s_Guid
Page Type	3 - Two Column - Single Entry
Page Title	Additional Program Info
Description	
Use as List Object	☐
Header Page	None
Search Destination Page	None
Agency ID	All

Security:

☒ Agency Administrator

☒ User

Includes:

☐ Print By Date

☐ Require Search

☐ Link to Notes

☐ Code Module

☐ Batch Entry

Update Close ADD ALL FIELDS Fields...

Export Page

Field Summary

The field summary screen shows a list of the fields for the page, the caption that shows on the screen for the end user, the field type, required status, the column alignment, and default value. To edit, click the corresponding "Edit" button.

Edit Page Info		Close	Print	Add	Create Procedure	Sync Procedure Fields	Reset Page Order	
Page Order	Field Name	Caption		Type	Required	Alignment	Default Value	Manage
2	➡	ID		Session	No	Center		Edit Delete
3	➡	AgencyID		Session	No	Center		Edit Delete
4	➡	CombinedID		Session	No	Center		Edit Delete
5	➡	IntakeID		Session	No	Center	-1	Edit Delete
6	➡	NoteID		Session	No	Center	-1	Edit Delete
7	➡	Confidential	Confidential	CheckBox	No	Center	1	Edit Delete
8	➡	Date	Date	Date	No	Center	Current Date	Edit Delete
9	➡	Deleted		CheckBox	No	Center	0	Edit Delete
10	➡	CreatedBy		Session	No	Center		Edit Delete
11	➡	DateCreated		Hidden	No	Center	Current Date	Edit Delete
12	➡	UserID		Session	No	Center		Edit Delete
13	➡	LastModified		Hidden	No	Center	Current Date	Edit Delete
14	➡	Location	Location	Text	No	Left		Edit Delete

Changing Sort Order

To change the order of fields on a page, enter the *destination* line for the field to be moved in the box to the right of the Sort Order number. Click the arrow (“->”) button. The field is moved to the new line and the following fields reordered automatically.

Editing Field Information

Page Order	11
Field Name	First
Stored Procedure Field	@First
Note: This field is automatically updated upon save.	
Caption	First
Field Type	Text
Session Object	None
List Object	None
Maximum Characters	50
Column Alignment	Left
Default Value	
Required Field	☒
Include when <u>adding</u> a record:	☒
Include when <u>updating</u> a record:	☒
Update the following field after selecting an option:	Select...
Use the following list to update the field:	None
Use for Date Range	☐
Data Sort Order #	0 ASC
Summary Grouping Order #	0

Adding New Fields to Table

Field Name	Add New Field
------------	--

Accessing Existing Pages

From the FormsManager menu (Screen List), select the primary menu from the top of the screen. Select the screen/page to edit by clicking on the corresponding “Edit” button. (see Editing Page Information)

Home		Main		Clients		Reports		Administration			
Print		Add		Import Page		New Data Table		New List Table		Close	
PageID	Title	Table		Agency ID	Type	Manage					
6868	Additional Program Info	ProgramInfoAdditional		All	3	Edit	Delete	Copy	Fields...		
6896	Case Notes	Notes		All	1	Edit	Delete	Copy	Fields...		
6875	Client Demographics	Name		All	3	Edit	Delete	Copy	Fields...		