BELLDATA

Client Services Network v4.0

Administrator's Manual

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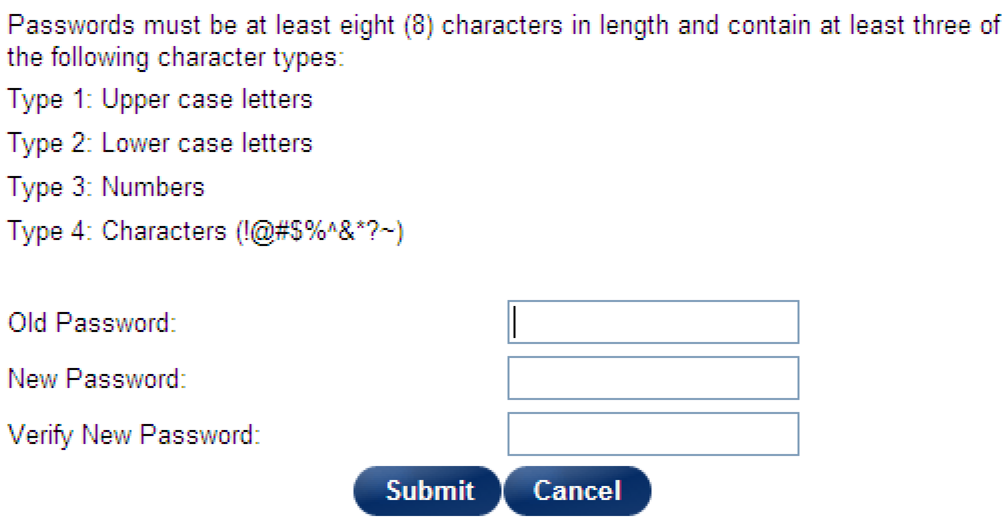
Accessing CSN

First Time Login Procedures

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

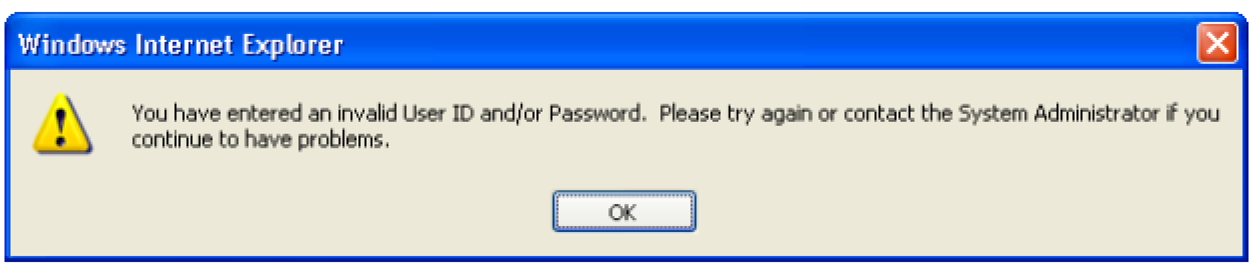
Click on Login. The Login screen will appear.
Click on the User ID box. Type your User ID into the box.
Click on the Password box. Type the word, PASSWORD, into the Password box.
Click on the SUBMIT button.
The next screen you will see asks you to Change (original) Login Password.



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.

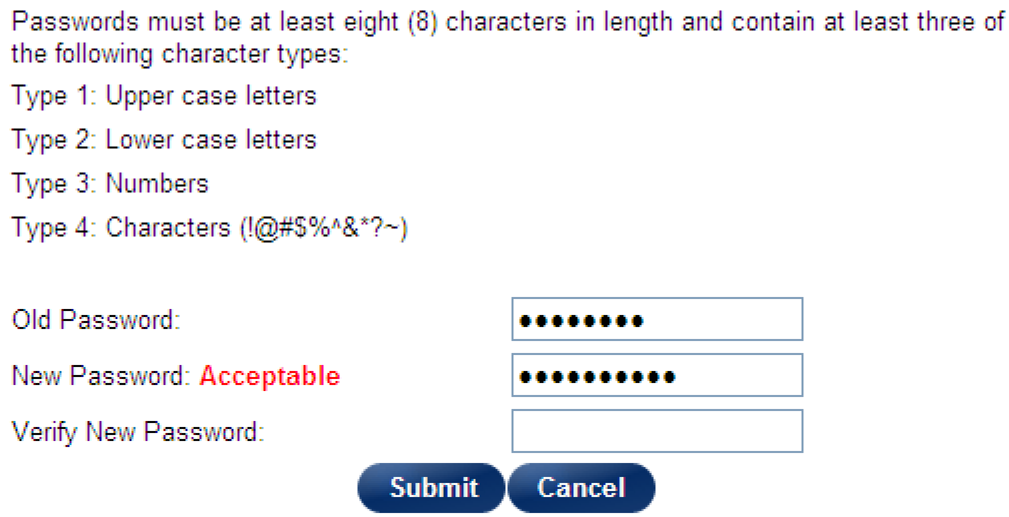
If your password is NOT accepted, you will see the message below. Click on the OK button. Repeat steps 1 - 4 above. The account is automatically locked out after three (3) unsuccessful attempts.



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 then 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.



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.

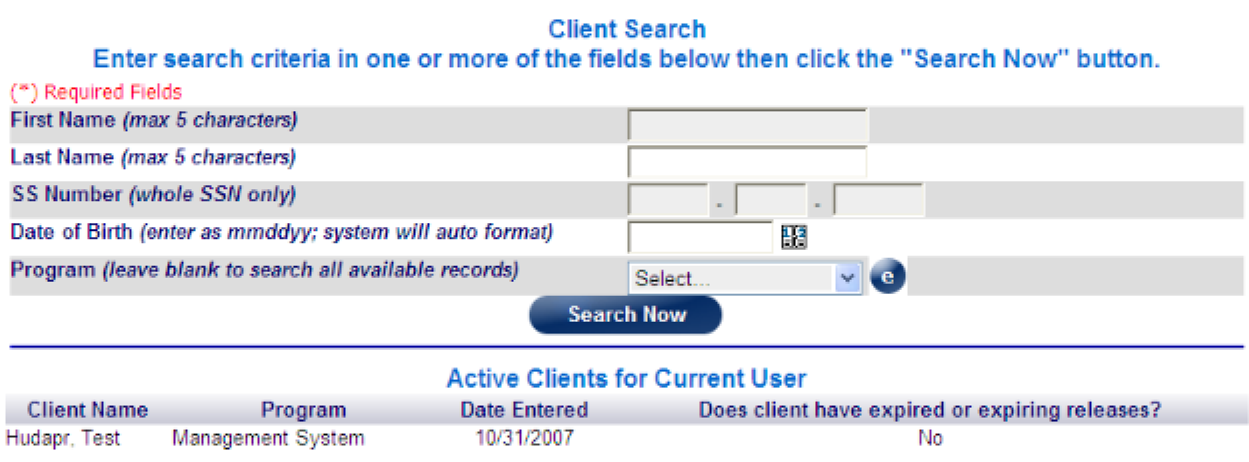
Agency and Workgroup Selection

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.

CSN Workgroup Home Page

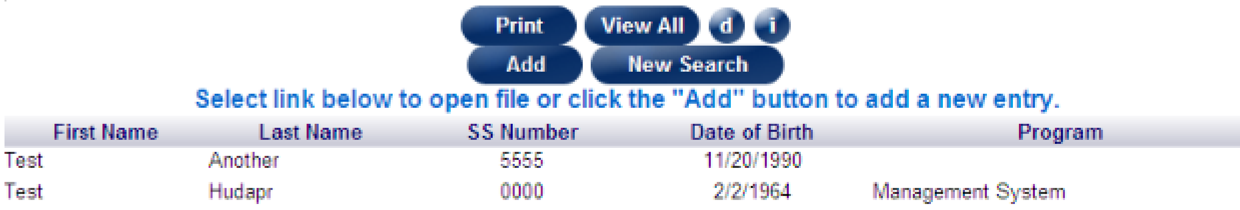
Search Screens

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.



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”.



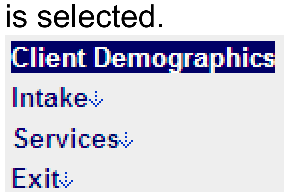
Menus and Buttons

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

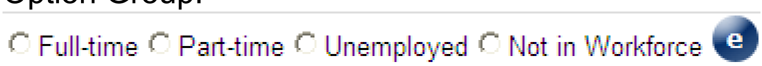
View/edit instructions for current screen

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:

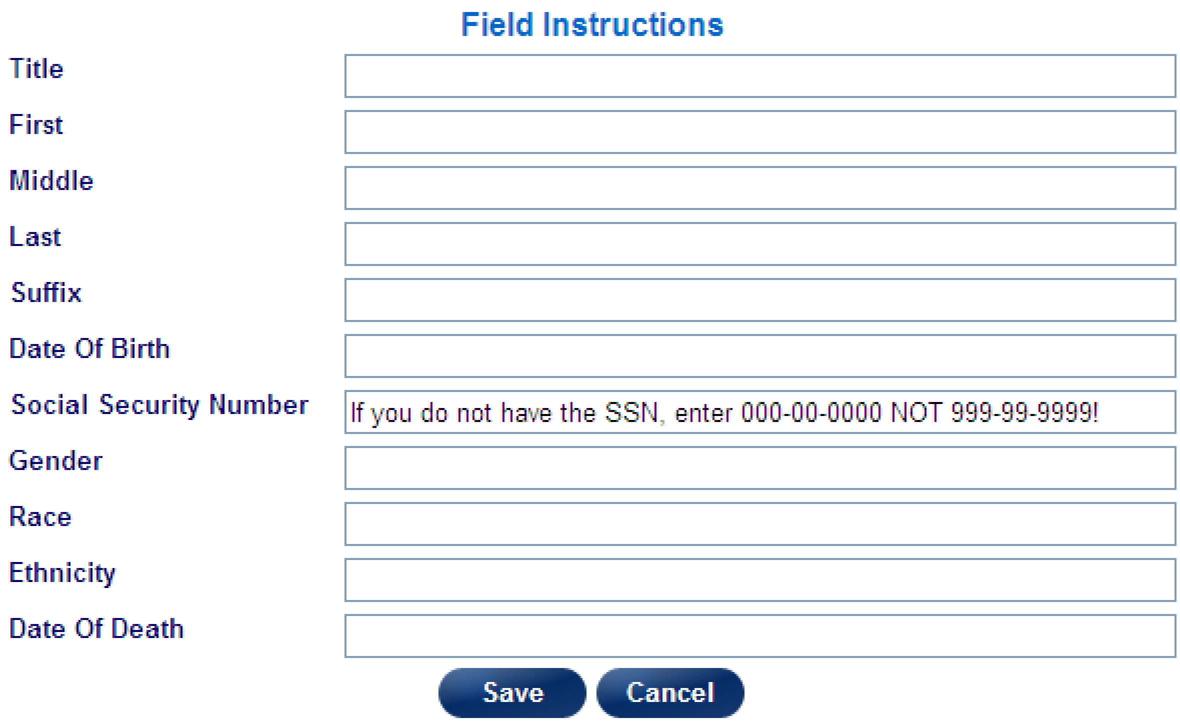


Each list has a Sort Order, Code, Description, Category, and Inactive field. The lists are sorted by the Sort Order then Description fields. The value in the Code field is what is stored when the item is selected and once set can not be changed. The Description field is displayed on the screen. The Category 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

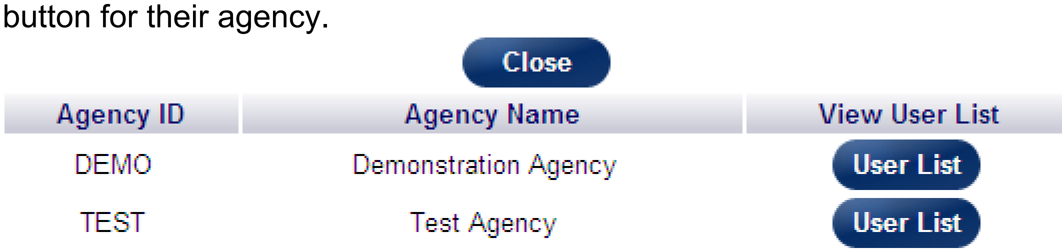
Field specific instructions can be added to each screen and is specific to each agency. Therefore, even though two agencies are using the same screen each can have their own specific instructions. The input boxes automatically expand as text is entered and allows up to 1000 characters per box. When the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



UserManager

Agency List

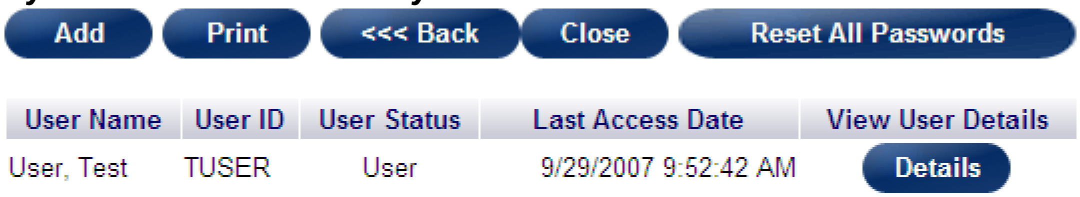
User logins and permissions are administered in the UserManager and are accessed from the Administration menu. The UserManager opens in a new browser window. The first screen shows a list of agencies. System Administrators can access the users for all agencies via the “User List” button. Agency Administrators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



User List

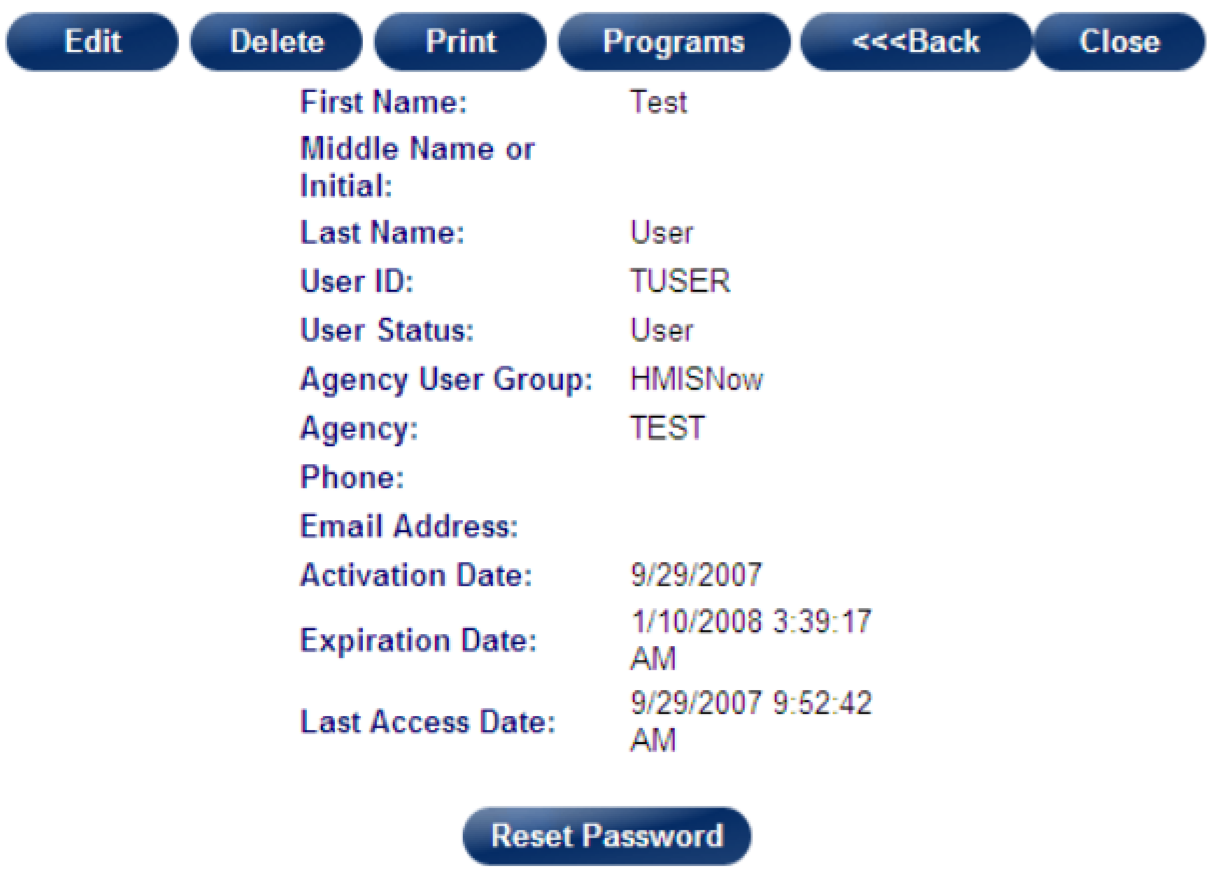
The following screen shows a list of all user accounts for the selected agency. To edit a user account, click the “Details” button. To add a new user, click the “Add” button (see “Adding and Editing User Accounts”. The “Back” button returns to the Agency List and the “Close” button closes the browser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

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



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.



Reset Password

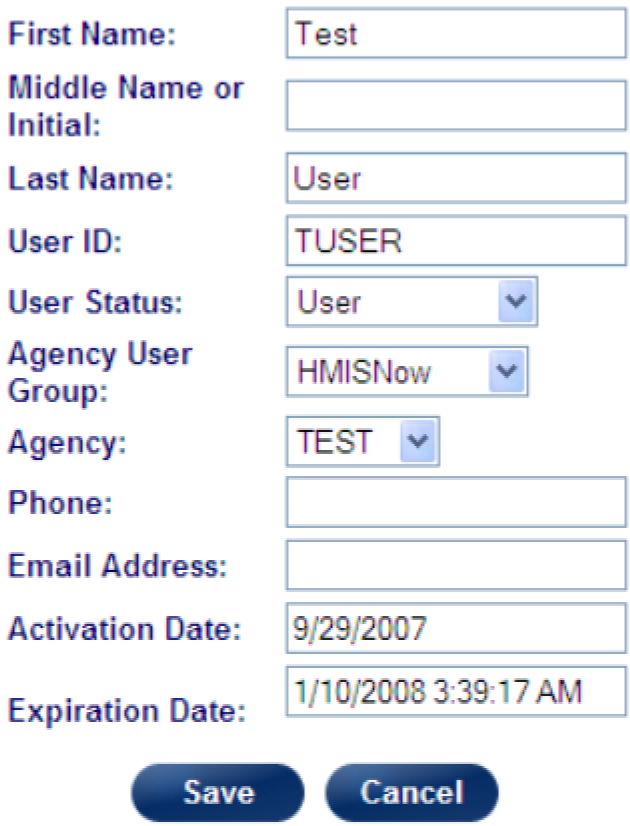
To reset a password, click the "Reset Password" button. The password is reset to "PASSWORD". The user will be prompted to change it during their initial login.

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.

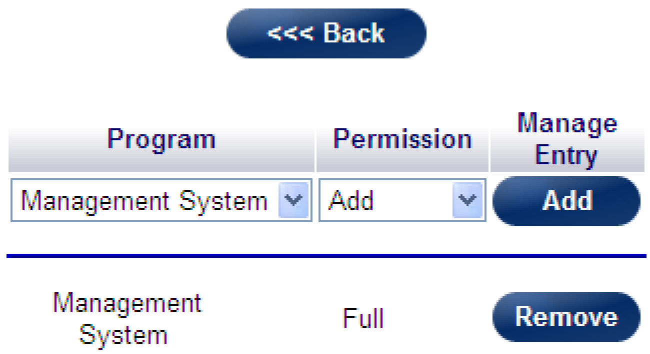
The Agency User Group or Workgroup sets the items that appear on the menus and the user's permissions for those items. (see WorkgroupManager)



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.



WorkgroupManager

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

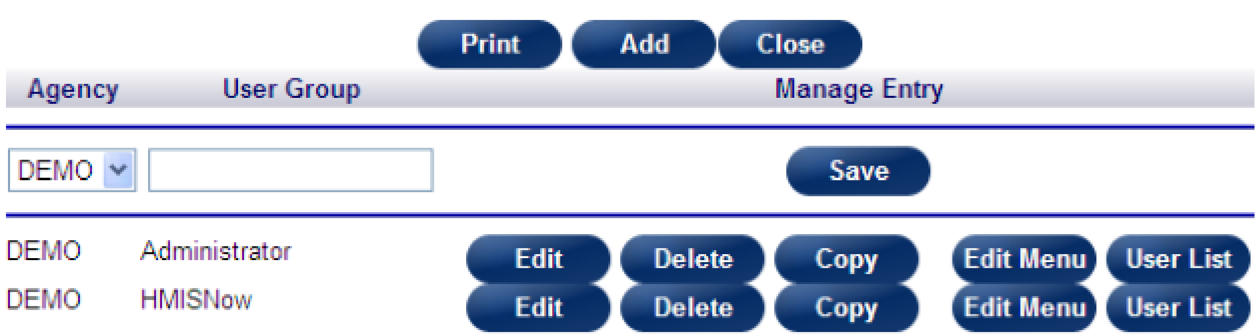
Workgroups can be added by either creating a new one or copying and existing one. Workgroups in one agency can also be copied and moved to another agency!

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.*



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 diabled 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.

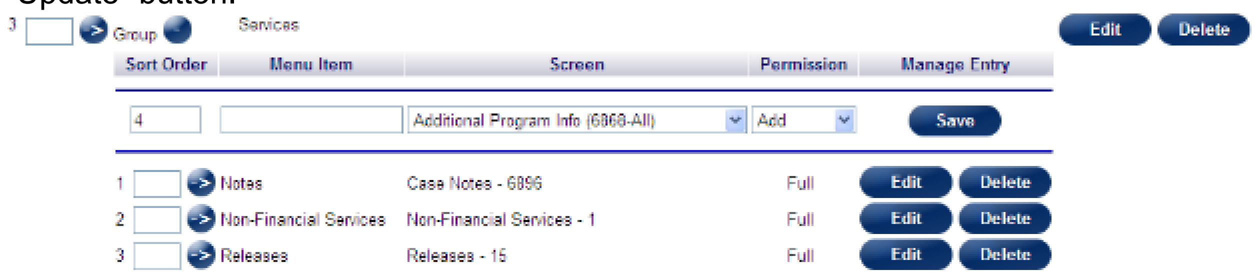
Adding and Editing Submenu Items

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.



Changing Sort Order

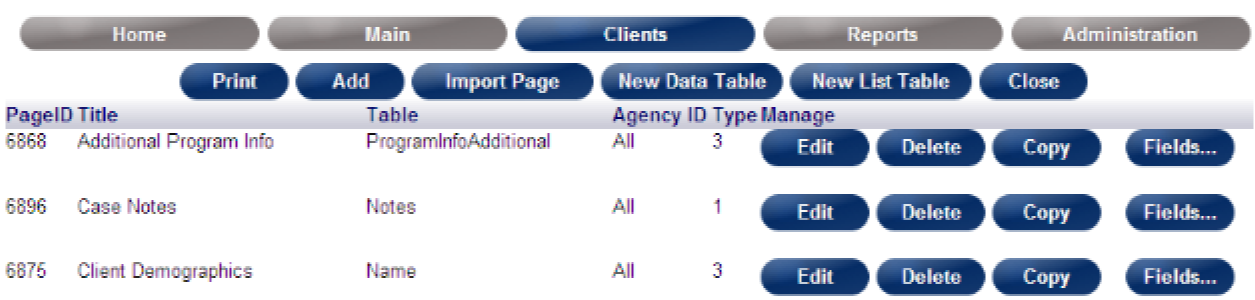
To change the order of menu and submenu items, enter the *destination* line for the item to be moved in the box to the right of the Sort Order number. Click the arrow (“->”) button. The item is moved to the new line and the following items reordered automatically.

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.



CSN Table Types

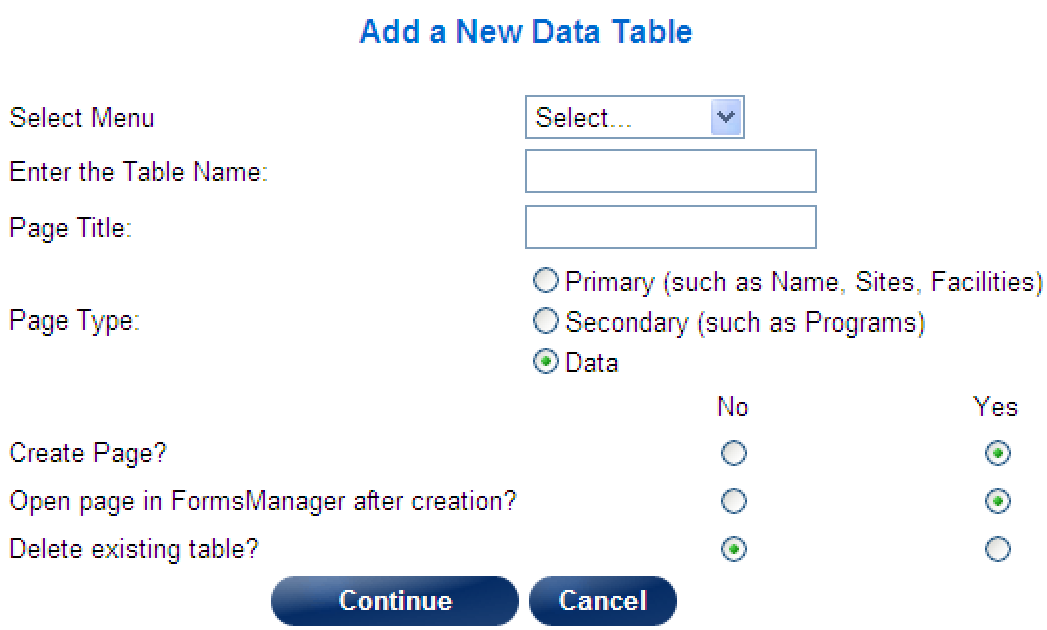
In the CSN database, there are three types of tables: Application, Data, and List. The application tables control the user accounts, menus, and administrative functions. Data tables contain the data input by the end user. List tables contain values for drop-down and option lists. These values are maintained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

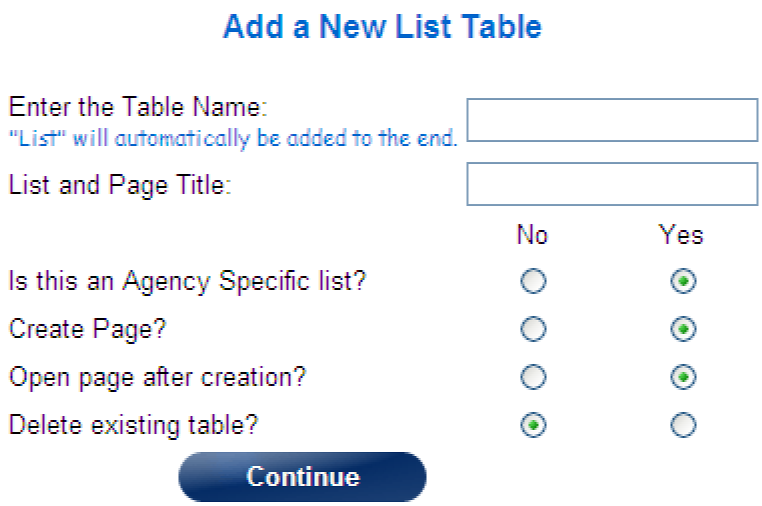
1. Select the primary menu to which the new screen/page will be added.
2. Enter the new UNIQUE table name. Only alpha characters are accepted with no spaces.
3. The table name is automatically copied to the Page Title. The Page Title will accept spaces and numbers.
4. Select the Page Type. The default 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.



Adding New List Tables

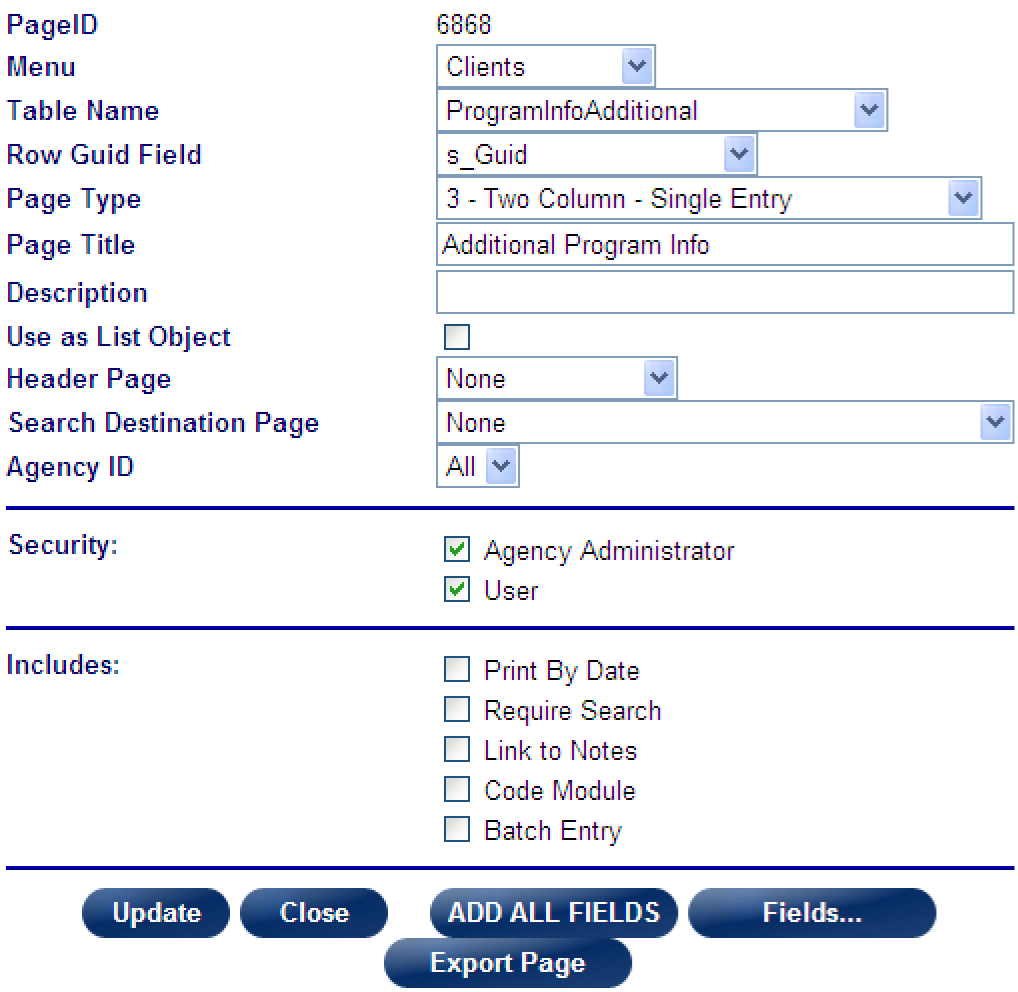
List tables are created in much the same manner as Data tables with the following exceptions:

- 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 administrered only by the System Administrator and the same values are used by ALL agencies.



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.



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 Note: This field is automatically updated upon save.	@First
Caption	First
Field Type	Text
Session Object	None
List Object	None
Maximum Characters	50
Column Alignment	Left
Default Value	
Required Field	☑
Include when adding a record:	☑
Include when updating 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

Update Close

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)