

3. Quick Reference: Client Services Network

A. Logging in

1. Website: <https://www.clientservicesnetwork.com/csnmarinca>

Troubleshooting: Make sure to include the https://

2. The login screen requires your User ID and Password

3. After log-in select your agency. Each user under workgroup must select HMIS Only. This is the workgroup to be used at all times; the Administrator site is not used. (only used to view examples of other modules available on CSN).

Select the Agency and/or Workgroup to access:

Select Agency:

Select Workgroup:

B. Changing or Resetting passwords

1. From the Client Search Screen select Administration from the menu.
2. Go to UserManager.
3. Select your agency to View User List.
4. Example Screen: This will show all users for the agency.

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

5. Click the Details button to view the user's information.
6. Once selected you will see the screen below. To reset password select "reset password"

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

7. The password is reset to "PASSWORD". The user will be prompted to change it during their initial login.

8. NOTE: You may need to change the user status, if it reads “INACTIVE” this occurs when there has been more than 3 unsuccessful attempts to login. Status should be changed to “USER” unless user is an agency administrator. This can be done by selecting “Edit”.

C. Adding New Users

1. From the Client Search Screen select Administration from the menu.
2. Go to UserManager.
3. Select your agency to View User List.
4. Example Screen: This will show all users for the agency.

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

5. From this screen select “Add”, you will be given the following screen to enter the user’s details. User ID is typically the first letter of first name and last name.

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
SaveCancel	

6. The User Status controls the system-wide permissions for the account and consists of the following:

- 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.

7. The Agency User Group or Workgroup sets the items that appear on the menus and the user’s permissions for those items. Select “HMIS ONLY”.

8. Select “Save” and “Close”.