

ADD A NEW USER

Before a user can begin using *ServicePoint*, the user must first be added to the database and associated with a provider/organization by an administrative user.

1. Click the *Admin* tab on the navigation toolbar. The screen will refresh and display the **Administration Dashboard** screen. (See Figure 1-1)

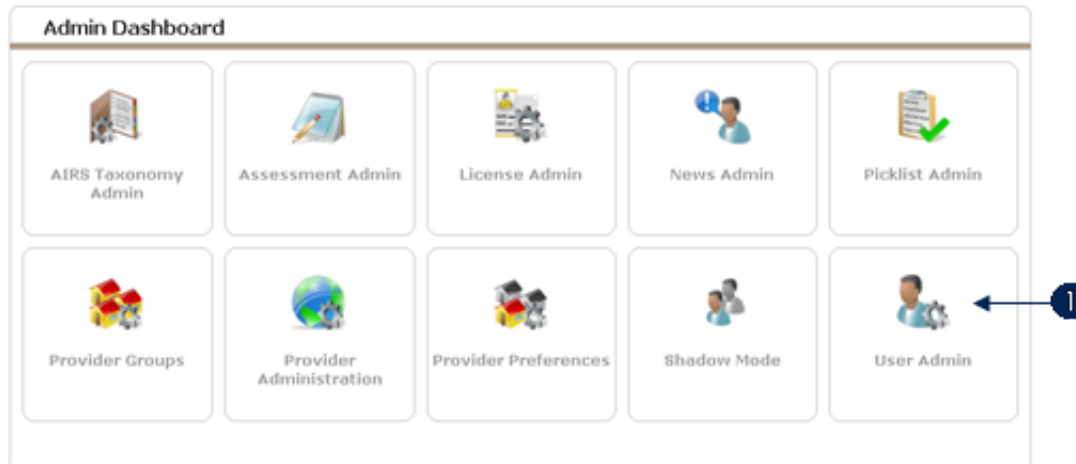


Figure 1-1

Note: *The options that display on the Admin Dashboard screen depend on the ServicePoint user access level and the ServicePoint modules installed in the application.*

2. Click **User Admin**. **(1)** The **User Search** screen will appear. (See Figure 1-2)



Figure 1-2

3. Click **Add New User**. **(1)** The **User Information** screen will display. (See Figure 1-3)

The screenshot shows a web form titled "User Information" with a subtitle "Enter Data As Groups". The form includes the following fields and controls:

- Provider ***: A dropdown menu with a "Choose Provider" button next to it. A blue circle with the number "1" and an arrow points to the "Choose Provider" button.
- Name ***: A text input field.
- Title**: A text input field.
- E-mail**: A text input field.
- Telephone**: A text input field.
- User Name ***: A text input field.
- Password ***: A text input field containing "kfe55179". To its right is a "Generate Password" button. Below the password field is a note: "Password must be 8-50 characters long with at least 2 numbers."
- Role**: A dropdown menu currently set to "Volunteer".
- User Expiration**: A date selection field with a calendar icon.
- Time Zone**: A dropdown menu currently set to "US/Samoa".
- At the bottom right, there are "Save" and "Exit" buttons.

Figure 1-3

Note: *The Add New User button will not display if the provider has allotted all their user licenses. For information on purchasing more licenses, please view the Licensing section of this document.*

4. Click **Choose Provider** **(1)** if the assigned provide requires a change (the provider will initially default to the current user's provider.) A provider search window will appear. (See Figure 1-4)

The screenshot shows a "Provider" search window. It features a search bar with the text "Search for Providers by using keywords for their Provider name or description". Below the search bar are "Search" and "Clear" buttons. To the right of the search bar is a "Show Advanced Options" button. At the bottom right, there is an "Exit" button. Three numbered callouts are present: a circled "1" points to the "Search" button, a circled "2" points to the "Search" button, and a circled "3" points to the "Show Advanced Options" button.

Figure 1-4

5. Enter key words in **Search (1)** and click **Search. (2)** If the search result list is too long, click **Show Advanced Options** to narrow the search. **(3)** (See Figure 1-5)

Provider

Provider Search

Search for Providers by using keywords for their Provider name or description

Search Hide Advanced Options

City State

County/Parish Area

ZIP Code

Type ServicePoint Users ONLY

Service Codes Lookup Target Populations Lookup ESF Services Lookup

Figure 1-5

6. On the **Advance Search** screen enter additional criteria to narrow the provider search. Click **Search** to generate **Provider Search Results. (1)** (See Figure 1-6)

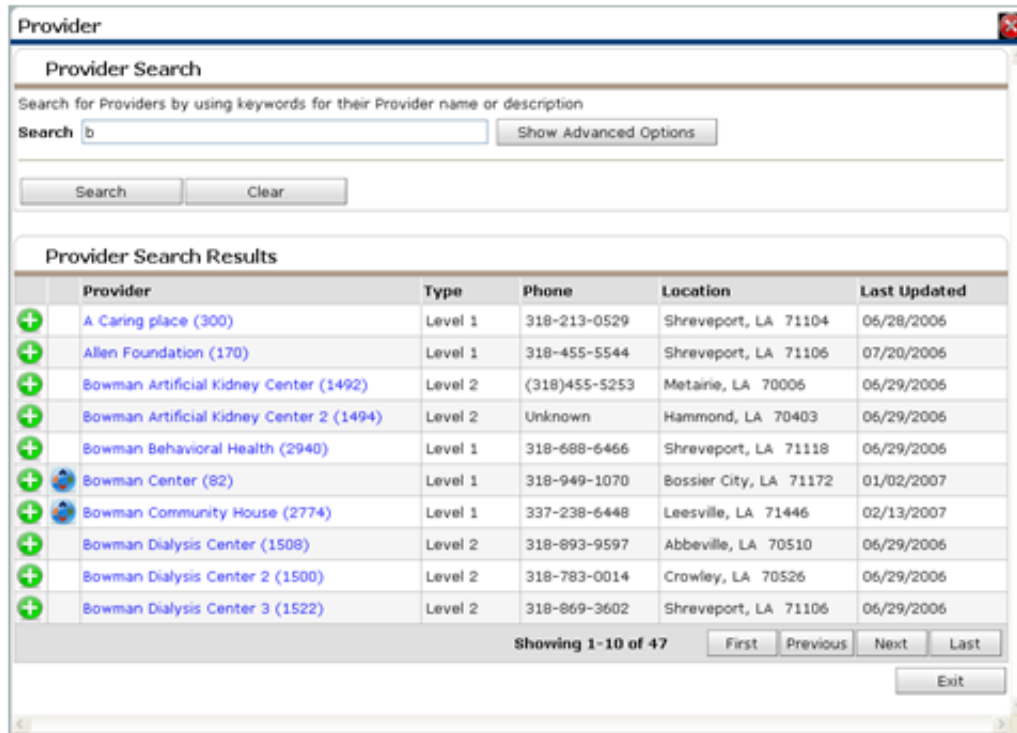


Figure 1-6

7. Click the **Green Plus** icon adjacent to the name of the provider to be assigned to the user. The search window will close and the selected provider will be listed next to **Provider** on the **Add New User** screen. (See Figure 1-7)

The screenshot shows a web-based form titled "User Information" with a sub-header "Enter Data As Groups". The form contains several input fields and buttons:

- Provider***: A dropdown menu showing "American Help Center (2)" with "Search", "My Provider", and "Clear" buttons.
- Name***: A text input field.
- Title**: A text input field.
- E-mail**: A text input field.
- Telephone**: A text input field.
- User Name***: A text input field.
- Password***: A text input field with a "Generate Password" button to its right. A blue circle with the number "1" and an arrow points to this button. Below the field, a note reads: "Password must be 8-50 characters long with at least two numbers or symbols."
- Role**: A dropdown menu showing "Support Role".
- User Expiration**: A date selection field with icons for calendar, refresh, and help.
- Time Zone**: A dropdown menu showing "US/Central".

At the bottom right of the form are "Save" and "Exit" buttons.

Figure 1-7

8. Complete the following fields:

- a: **Name** – The user's name.
- b: **Title** – The user's job title.
- c: **E-mail** – The user's email address.
- d: **Telephone** – The user's telephone number.
- e: **User Name** – The user's sign on.
- f: **Password** – The user's password. Click **Generate Password (1)** to use a system generated password.
- g: **Role** – The user's role, which defines the available *ServicePoint* functionality.
- h: **User Expiration** – The date the user record will no longer be active.
- i: **Time Zone** – The user's time zone.

User Information Enter Data As Groups

Provider *	Bowman_Center (02)	Choose Provider
Name *	Bill McKinley	
Title	President	
E-mail	bmac@bowmancenter.com	
Telephone	555-555-5555	
User Name *	bmac	
Password *	kfe55179	Generate Password
<small>Password must be 8-50 characters long with at least 2 numbers.</small>		
Role	Case Manager II	
User Expiration	<input type="text"/> / <input type="text"/> / <input type="text"/>	

Save Exit

1 2

Figure 1-8

9. Click **Save (1)** to retain the user information. Click **Exit (2)** to exit without saving the user information. After the new user record is saved, additional user related data areas appear at the bottom of the screen. (See Figure 1-9)

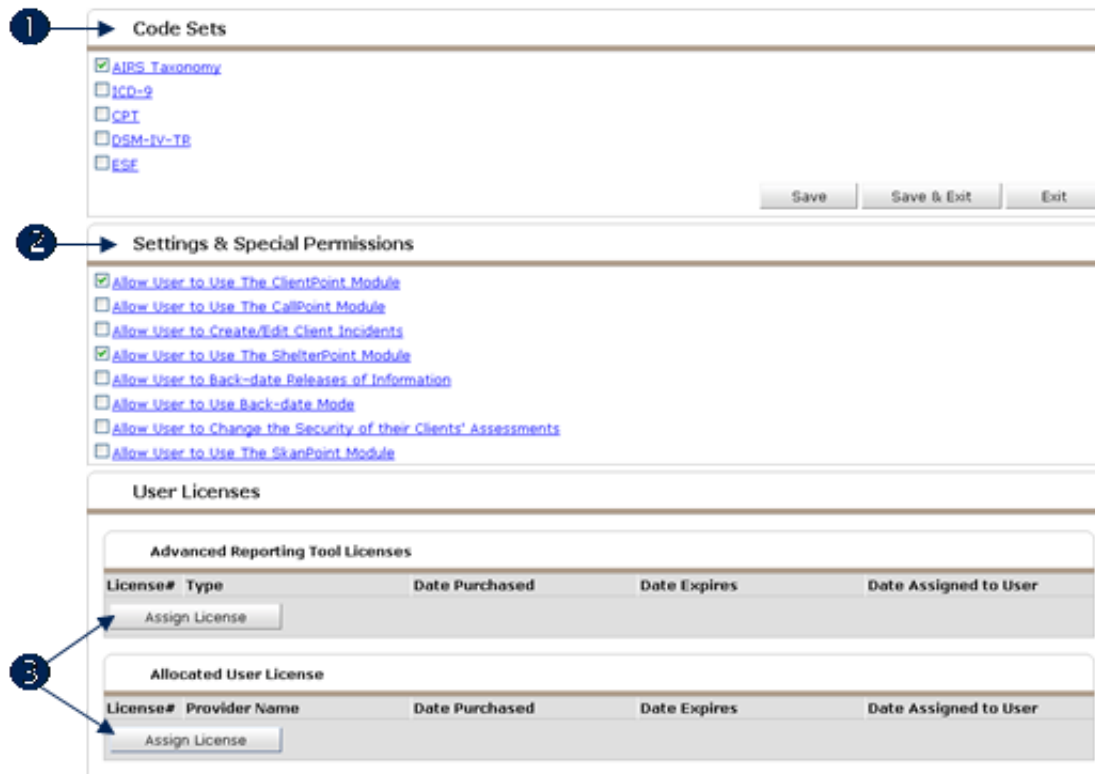


Figure 1-9

10. In **Code Sets (1)** select the code sets the user will access to while assigning services in *ServicePoint*. The AIRS Taxonomy code set is in use by default within *ServicePoint*.
11. In **Settings and Special Permissions (2)** check the check boxes that correspond to the functionality the user needs to perform their duties.
12. In **User Licenses** click **Assign License (3)** to assign an ART License or a *ServicePoint* license to the user.
13. When assigning a *ServicePoint* license the following screen will display. (See Figure 1-10)

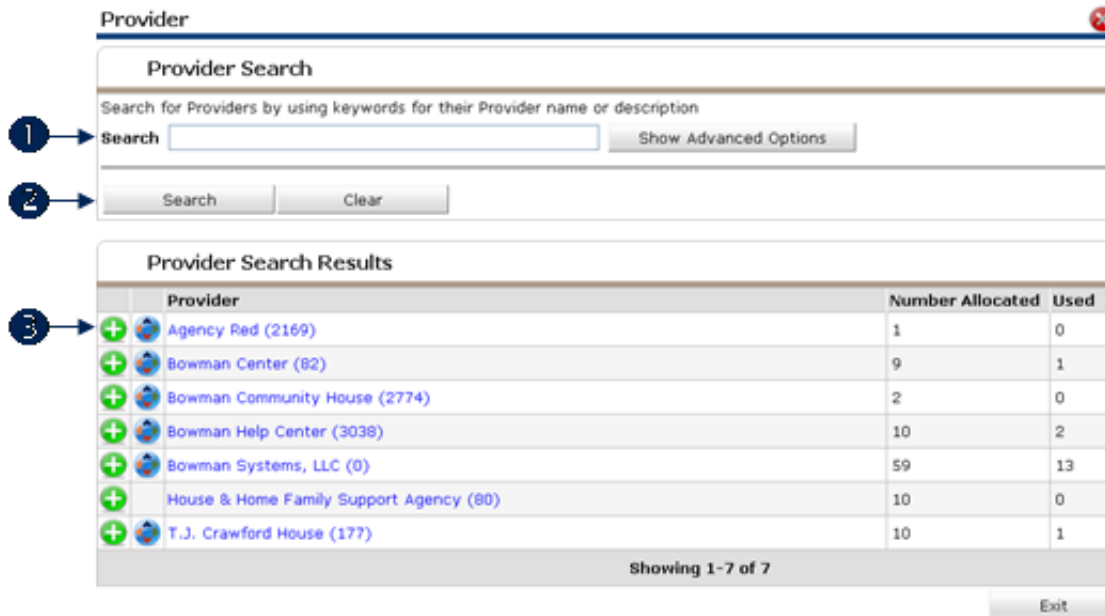


Figure 1-10

14. Use the **Search** field **(1)** to enter key words and click **Search** **(2)** to narrow the **Provider Search Results** display. Click the **Green Plus** icon **(3)** to assign a license to the user. **(3)**

15. When assigning an ART license the following screen will display. (See Figure 1-11)

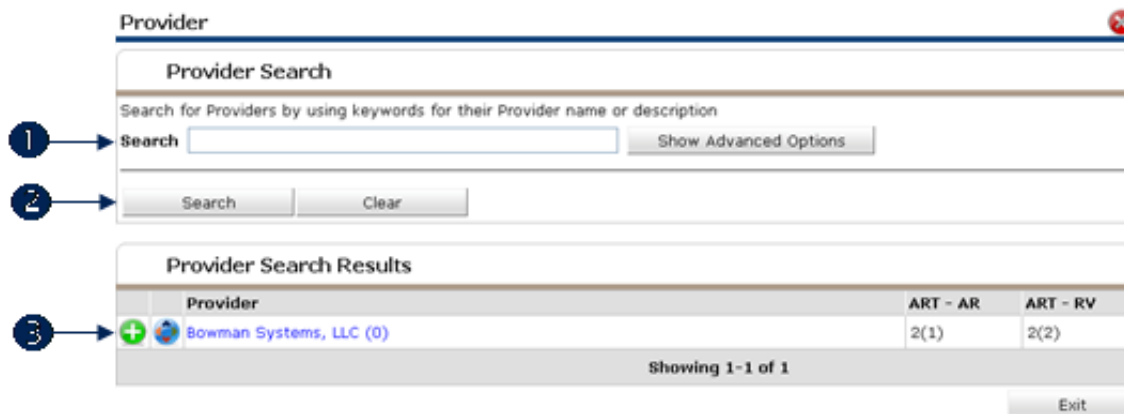



Figure 1-11

16. Use the **Search** field **(1)** to enter key words and click **Search** **(2)** to narrow the **Provider Search Results** display. Click the **Green Plus** icon  to display the available ART licenses at the selected provider. **(3)** (See Figure 1-12)

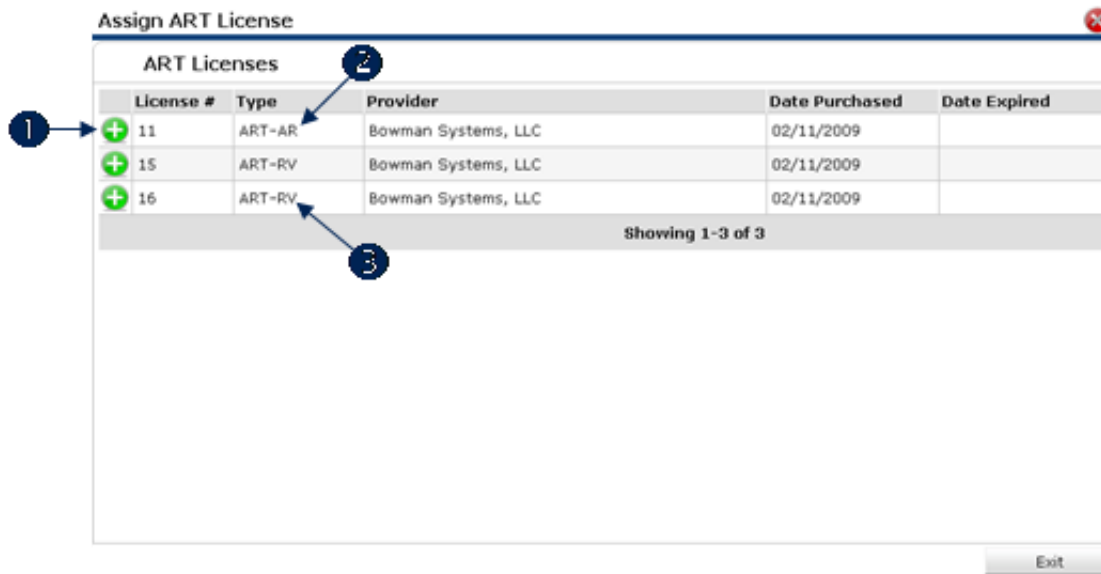



Figure 1-12

17. Click the **Green Plus** icon  next to the ART license to be assigned to the user. **(1)** ART AR **(2)** licenses are Adhoc Reporting licenses. ART RV **(3)** licenses are Report Viewer licenses. (See Figure 1-13)

User Licenses				
Advanced Reporting Tool Licenses				
License#	Type	Date Purchased	Date Expires	Date Assigned to User
15	ART Report Viewing	Wednesday, February 11, 2009		Friday, September 11, 2009
<input type="button" value="Assign License"/>				
Allocated User License				
License#	Provider Name	Date Purchased	Date Expires	Date Assigned to User
156	Bowman Center	Tuesday, May 12, 2009		Friday, September 11, 2009

Figure 1-13

18. Licenses assigned to the user are now displayed