

Administrator

**Computer Program for Windows™ Version 5
Software Manual
Part of the MHS Professional Tool Suite**

MHS Staff



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Documentation Conventions

Administrator users must have knowledge of Windows. The instructions in this guide apply to Windows NT and are limited to those tasks specifically required for the operation of Administrator. Some instructions and screen illustrations in this guide will not be accurate for Windows 95, Windows 98, Windows 2000, and Windows Millenium Edition users.

This is a guide to working with Administrator. If you require details pertaining to using the software that are not covered in this manual, refer to the Administrator online Help.

Terminology

Note that this documentation uses the terminology “client” to refer to the person receiving the service and “assessor” to refer to the person providing the service for all descriptions and procedures. However, MHS SmartLink and Administrator are used by many types of professionals, each requiring different terminology for the fields of the forms and dialog boxes. You can set the terminology that meets your requirements by using the Upload Caseload dialog box (see the instructions in *Modifying Caseload Preferences* in chapter 3 of this manual).

Instruction Methods

- ◆ Procedural steps are numbered. For example,
 1. Click on the Tools menu item.
 2. Click on the Purchase option in the drop-down menu.
- ◆ Items with a box indicate choices or alternative methods for advancing to the next step in the procedure. For example,
 - If you want to save the changes, click on the Yes button, or
 - If you do not want to save the changes, click on the No button.
- ◆ Information that the user must supply is italicized and placed in square brackets.

Type [*the client's name*].
- ◆ Toolbar buttons, sidebar buttons, and icons appear in the margins, sometimes with key combinations, to illustrate alternative methods for performing tasks.
- ◆ Notes in the small left margin are features, details, warnings, or referrals to other sections.



Ctrl + O

For complete instructions on backing up your computer, see the Administrator online Help.

1 Introduction

This chapter provides an overview of the Administrator program. It also contains a description of the improved features of Administrator Version 5 compared to previous versions of the program.

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Administrator Version 5— An Overview

Administrator—one of the tools in the MHS Professional Tool Suite—allows you to set up multiple caseloads and set user names, passwords, and access rights. By setting up specific caseloads and user names, and by limiting access to particular features of the program to specific personnel, you can ensure the security of your client files and prevent modification to or loss of valuable data.



Administrator is automatically installed on your hard drive when you perform a standalone installation of MHS SmartLink on your workstation. It is also typically installed on the network server if you perform a server installation. An icon for Administrator appears in the MHS Professional Tool Suite program group on computers with these types of installations.

Although Administrator and MHS SmartLink are separate programs, they are linked. The primary purpose of Administrator is to compartmentalize and secure MHS SmartLink data. Administrator controls two groups of data: caseload information and user information.

If one copy of MHS SmartLink is used by multiple people (e.g., assessors, clerical staff, managers), Administrator allows you to create a hierarchy of usage. You can limit specific users within the same caseload to a particular set of functions. For example, if you want a manager to be able to add or delete client files but you do not want an administrative assistant to be able to perform the same functions, you can set up different user accounts for the manager and the assistant, with different passwords and different levels of access to MHS SmartLink features and tools.

In large institutions where several individuals (or departments/groups of individuals) use MHS SmartLink, particularly when the program is used on a network, it may not be desirable for

information such as client lists to be shared or accessed by so many different people. To maintain the confidentiality of client data, separate caseloads can be set up in Administrator with different user names and passwords so that one assessor cannot have access to the data of another assessor. Caseload data and preferences can be modified either from Administrator or from MHS SmartLink. Although separate caseloads cannot share data, they do share the same tools installed in a single copy of MHS SmartLink. In this way, Administrator provides security for data with the convenience and cost-effectiveness of being able to share assessment materials.

If you are the only person using your computer system, you may not have to work with Administrator. However, regardless of how rarely you use Administrator, never attempt to delete this program or you will not be able to run MHS SmartLink or the other tools in the MHS Professional Tool Suite (e.g., LSI-R, EQ-i).

This software manual should be all you need to learn Administrator if you are familiar with the Windows operating environment.

Improved Features of Administrator Version 5

Compared to earlier versions of Administrator, version 5 includes several improved features, described below.

- ◆ Provided that users have been given the appropriate access rights, they can access all the available caseloads by using one login name and password (older versions required the use of a different password for accessing each caseload).
- ◆ To help maintain data security and monitor the use of scoring uses for per-use tools, the new Activity Trail feature allows users to view all transactions performed by all users.
- ◆ An improved security measure allows the assigning or withholding of the access rights to individual functions and data sets.

- ◆ Administrator Version 5 provides the option of modifying the toolbar to create an operating environment that is specially adapted for your current purposes. See the Administrator Version 5 online Help for details.

Getting Started 2

This chapter contains the information you need to begin using Administrator Version 5. It contains sections about installing and launching the program, an overview of the screens you will need to use, and the steps you must follow to exit from the program.

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About the Administrator Version 5 Installation

There are two types of installation for Administrator: Server and Standalone. Choose the installation that is appropriate to your computer system when you install MHS SmartLink. For details about the installation process, see the installation booklet that accompanied your MHS Professional Tool Suite CD.

Server Considerations

When you install MHS SmartLink, the Administrator program is installed automatically as well. When you perform a server (network) installation, Administrator is only installed to, and available from, the originating workstation or server. It is not installed on individual workstations when you perform client installations. This restriction is made for security reasons: to protect your data and to ensure that unauthorized users do not have access to the power of the Administrator program.

It is possible for you to install Administrator on a client workstation if someone other than yourself needs access to Administrator, or if you prefer to work on a computer other than the server. However, it is important that you understand and accept the risks involved in giving Administrator rights to others. You can provide user access to the Administrator program by installing the Administrator program on the client workstation and assigning the user the Administrator right. To install the program on a client workstation, browse the MHS Professional Tool Suite CD to the Admin directory. Double click on the setup.exe icon. The installation will proceed. Note that MHS SmartLink must already be installed on the client workstation before you install the Administrator program. Once the program is installed, and the access right has been provided, the user will be able to access the program and perform user and caseload management tasks, such as defining the functions of MHS SmartLink to which other users have access.

Launching Administrator Version 5

Administrator is automatically installed when you install standalone or server versions of MHS SmartLink, but it can be launched regardless of whether MHS SmartLink is running. If Administrator is installed on a network server, the program will only be accessible from the originating workstation. All other client workstations will not have access to Administrator. If you would like to provide access to Administrator from a client workstation, you can perform an advanced, custom installation.

To launch Administrator, after MHS SmartLink has been installed on a server or standalone computer,



1. Either double-click on the Administrator icon in your Windows desktop, or click on the Windows Start button, select Programs, MHS Professional Tool Suite, and click on MHS Administrator.

The Administrator Login dialog box appears.

2. Enter [*your user name*] into the space provided. The default user name is **admin**.
3. Enter [*the password*] into the Password field, and click on the OK button. The default password is **admin**.

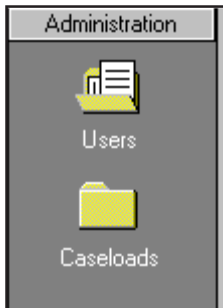
The Administrator screen opens.

It is recommended that you change the default user name and password to something confidential. See the section *Modifying a User Account* for details about changing passwords. You can now work with user accounts and caseloads, and establish access rights for MHS SmartLink users.

The Administrator Screens

Administrator stores a wealth of information and organizes it all in two easy-to-use screens:

Administration Screen

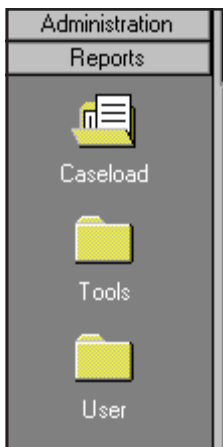


The Administration screen—the main Administrator screen—organizes your data into two subfolders, named the Users subfolder and the Caseloads subfolder.

The Users folder allows you to add, modify, and delete users and assign passwords and access rights quickly and easily. In each New User dialog box, user information is organized into three tabs (Password, Caseloads, and Rights) to provide easy access to the information you need.

The Caseloads subfolder allows you to assign terminology preferences, caseload IDs, and caseload names by completing the fields of the Caseload Information dialog box.

Reports Screen



The Reports screen organizes your reports into three folders: the Caseload folder (contains the Information Report), the Tools folder (contains the Activity Log Report and the Remaining Uses Report), and the User folder (contains the User Account Report). Once a report is onscreen, you can print it or save it to a file. See chapter 6 for more information.

Exiting Administrator Version 5

Once you have finished working in Administrator and set up your caseloads, caseload preferences, user accounts, and user access, you will probably want to exit Administrator and return to MHS SmartLink. If you had MHS SmartLink running while you were making changes in Administrator, you will have to exit MHS SmartLink and restart Administrator to see the changes you made.

To exit Administrator,

1. Click on the File menu.
2. Click on Exit in the drop-down menu.



Ctrl + Q

Any changes you made in Administrator will be applied the next time you launch the relevant programs. If other programs in the MHS Professional Tool Suite are running, close and restart the programs to see the changes.

2

Administrator Version 5 for Windows

Working with Caseloads

3

This chapter shows you how to simplify the process of storing and accessing your client and assessor data by organizing it into sets, known as caseloads. To illustrate this process, the Upload Caseload dialog box and its component fields is illustrated. This dialog box allows you to store contact information, select appropriate terminology for your clients, and assign caseload IDs. In addition, this chapter describes how to sort caseload information and how to create, modify, and delete caseloads.

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About Caseloads

You can create discrete, access-controlled sets of client and assessor data within your organization by creating caseloads. When you install MHS SmartLink, a caseload labeled P001 is automatically created. You can create new caseloads by opening the Update Caseload dialog box and entering data about the caseload you wish to create.

Note that each caseload in MHS SmartLink contains its own set of assessors and clients, and the data from two separate caseloads cannot be joined. MHS SmartLink will not allow you to have more than one caseload open on the same computer at the same time unless you open multiple copies of MHS SmartLink. However, each caseload and assessor can use all the tools in a particular installation of MHS SmartLink.

The purchaser of any per-use tool is responsible for protecting uses from unauthorized use by other assessors if costs are an issue.

The Update Caseload Dialog Box

To open the Update Caseload dialog box, open the Caseloads folder in the left-hand sidebar of the Administration screen and then double-click on the caseload on the right side of the screen that you wish to open. The Update Caseload dialog box enables you to set the terminology that is appropriate for your caseload. Detailed instructions for entering this information are provided later in this chapter in the sections *Creating a New Caseload* and *Modifying Caseload Preferences*.

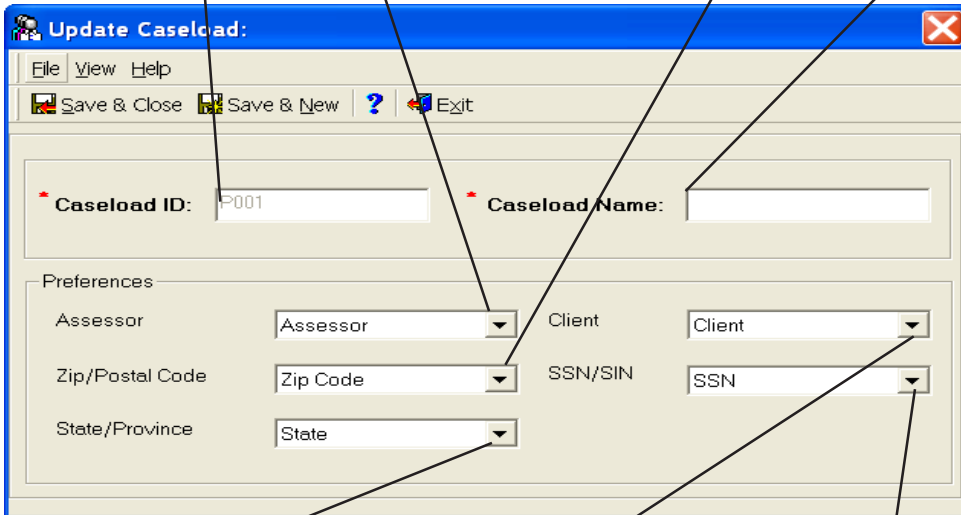
The Update Caseload dialog box is illustrated on the opposite page.

Once you enter a caseload ID, it becomes fixed and cannot be altered when you modify caseload information. Caseload IDs can contain up to four alphanumeric characters.

Click on the drop-down arrow adjacent to the Assessor field and a drop-down list appears, displaying a list of alternative titles for the person who will administer MHS SmartLink assessments (e.g., Case Administrator). Click on the title that is most relevant in your setting.

Indicate in this field whether you want MHS SmartLink to prompt for Zip Code or Postal Code when collecting address information. Your choice will be reflected in forms and tools requiring this information.

You can modify the caseload name by typing a new name in the field provided. Caseload names can be up to 23 characters.



Indicate in this field whether you want MHS SmartLink to prompt for State or Province when collecting address information for clients and assessors. Both North American state and provincial abbreviations appear in the drop-down lists.

Click on the drop-down arrow adjacent to the Client field and a drop-down list appears, displaying a list of alternative labels for the person who is receiving the service (e.g., subject). Click on the label that is most relevant to your setting.

Click on the drop-down arrow adjacent to the SSN/SIN field and select your preferences from the drop-down list.

Creating a New Caseload

You can create an unlimited number of caseloads in one installation of MHS SmartLink. While all caseloads share all tools in the MHS Professional Tool Suite, each caseload has its own client and assessor lists.

To create a new caseload,

1. From the View menu, select Go To, then click on Caseload Listing.
2. Select New from the File menu; then select Caseload.



Ctrl + N

The Caseload Information dialog box appears.

3. Assign an ID code to your caseload by typing four alphanumeric characters into the Caseload ID field. The ID you enter cannot be changed once the caseload is saved.

Note that a caseload labeled P001 is created during the initial installation process. You may want to follow the same naming model (i.e., P002, P003).

4. Enter a caseload name (e.g., Mils Consulting) in the Caseload Name field. Caseload names can be up to 15 characters in length.
5. Select the appropriate terminology preferences (see *The Update Caseload Dialog Box* on the previous page for details about the preference options).

Use your mouse or the Tab key to move from field to field in this dialog box.

6. Save the information you entered using one of the following methods:
 - Click on Save in the File menu to save the current information and keep the dialog box open, displaying the current information.



- Click on the Save & New button to save the current information and create another new caseload.



- Click on the Save & Close button to save the current information and close the dialog box.

The information you have entered is saved.

You have created a new caseload.

Modifying Caseload Preferences

You can use the Caseload dialog box to modify the preferences.

To modify caseload information from Administrator Version 5,

1. From the View menu, select Go To, then click on Caseload Listing.
2. Open the caseload you require using one of the following methods:
 - Double-click on it, or
 - Click once on it and select Open from the File menu, or
 - Click once on it and click on the Modify Caseload button.



The Upload Caseload dialog box appears displaying the information for the caseload you selected.

3. Make the necessary terminology changes (See *the Update Caseload Dialog Box* (p. 13) for a description of each field.)
4. Save the information in the Update Caseload dialog box in one of the following ways:



- Click on Save in the File menu to save the current information and keep the current dialog box open, or



- Click on the Save & New button to save the current information and create another new caseload.
- Click on the Save & Close button to save the current information and close the dialog box.

You have now updated your caseload information.

Sorting Caseloads

In Administrator Version 5 you can sort caseload information by caseload name or ID number. If you choose to sort caseloads by name, they will be displayed alphabetically by name. Similarly, if you choose to sort caseloads according to the ID number, they will be displayed according to the alphanumerical value of the ID number.

To sort caseload files,

1. From the View menu, select Go To, and then click on Caseload Listing.
2. Click on the column heading by which you wish to sort (i.e., Name or ID). A triangle appears beside the column heading.
3. Click on the column heading again to reverse the order in which the entries are sorted.

The caseloads are automatically displayed in ascending alphanumeric order.

Deleting a Caseload

When you delete a caseload, you delete all of the data that has been created in that caseload, including all assessor files, client files, and client test results. You cannot transfer data to another caseload.

Please note that the deletion of a caseload cannot be reversed unless you have backed up your data files for the caseload directory. Be absolutely sure that deleting is what you want to do, and perform a backup beforehand.

To delete a caseload,

1. From the View menu, select Go To, then click on Caseload Listing.

A list of caseloads appears on the right side of the screen.

2. Click once on the caseload that you want to delete from the list.
3. From the File menu, select Delete.

You are prompted to confirm that you want to delete this caseload and the data it contains.

4. Click on the Yes button.

The caseload data is removed permanently.

Working with User Accounts



This chapter describes how to set up user accounts so that each user in each caseload is identified by a user name and has a password. This chapter also describes how to allocate access rights to each user to determine his or her level of access to the functions and data in the MHS SmartLink program. The process of modifying and deleting user accounts is also described.

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About User Accounts

A “user” is an individual within a caseload who must access MHS SmartLink caseloads to administer assessments or interventions, install new tools, create or update client files, or generate reports. Users can be case workers, assessors, nurses, teachers, human resources personnel, administrative staff, clerks, or technicians. Each user in a caseload must have a user account. This account defines the user’s identity, password, and access or authority to use features and information in MHS SmartLink. Creating unique user names also ensures that user activities are tracked in a useful way by the Administrator Activity Trail feature. Upon launching MHS SmartLink, each user is required to login by entering his or her user name and password. The features that the user has been given authority to use are defined by the Access Rights in the User Accounts dialog box. Those functions that a user is unauthorized to perform are grayed-out when he or she launches the program.

If you upgraded to MHS SmartLink from earlier platform programs—PsychManager, Correction Manager, or PeoplePro—user accounts that you set up in those programs will be converted and they will appear in the Administrator list of users.

To change the default password, follow the instruction in Modifying a User Account.

When you install Administrator and MHS SmartLink, two user accounts are created for you automatically: an admin user account (designed for use by a systems administrator who uses the Administrator program) and an MHS user account (designed for use by a user of MHS SmartLink and individual tools). The admin user account cannot be deleted and rights cannot be changed (the admin user account has all rights). In contrast, the MHS user account can be deleted and its rights can be changed.

When logging into Administrator, the default user name and password are both admin. When logging into MHS SmartLink or tools (e.g., LSI-R, EQ-i) the default user name and password are both mhs. For security reasons, it is recommended that you change the default passwords as soon as you begin using the software.

The New User Dialog Box

When you set up your caseload, you should assign each user (doctor, technician, clerk, nurse, etc.) in the caseload his or her own user name and password. You can create a user account by entering the required information into the New User dialog box.

The New User dialog box contains a Password tab, a Caseloads tab, and a Rights tab. By clicking on the relevant tabs you can open forms that allow you to identify the user, store his or her password and terminology preferences, and define those caseloads within MHS SmartLink to which he or she will have access when logged into the program. Each tab of the New User dialog box is described next.

Password Tab

When you create a new user account, the first step is to set up the user name and password that this user will use to log into MHS SmartLink and tools (e.g., LSI-R, EQ-i). It is important to remind users not to share their password information with other users on the network. The Password tab is shown below.

Enter a user name in this field. When this user launches MHS SmartLink or a tool (e.g., LSI-R, EQ-i) he or she will be prompted to enter the user name in the Login dialog box. User names can be up to 16 alphanumeric characters in length.

Enter the full name of the person (e.g., John Smith) in the Full Name field. Oftentimes the user name does not provide any clues as to who the user is. By attaching a full name to a user account, you will not forget "who's who" in your database of users. Full names can be up to 16 characters in length.

Enter a description of the user account in the Account Description field. The account description is typically the job title of the user (e.g, manager, assistant). The account description can be up to 20 characters in length.

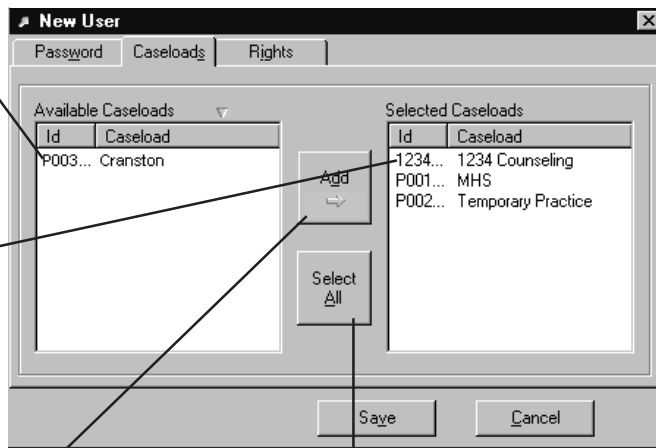
Type the user's password in these fields. When this user launches MHS SmartLink or a tool (e.g., LSI-R, EQ-i) he or she will be prompted to enter the password in the Login dialog box. Passwords can be up to 16 characters in length. In setting the password, you are required to enter it twice: once in the New Password field, and once in the Confirm Password field.

Caseloads Tab

The second step in creating a new user account is to decide on the caseloads that the user will have access to. A caseload is a set of information such as preferred terminology, user defined fields, assessor listings, and caseload data as well as a client database. See chapter 3 for more information about caseloads. In some cases you may want to give a user access to some caseloads but not others, depending on your security needs. An illustration of the Caseloads tab is presented next.

The Available Caseloads box lists all of the caseloads in the system. A caseload that is listed in the Available Caseloads box is one that has not been made available to this particular user.

The Selected Caseloads box lists all of the caseloads to which this particular user has access when logging into MHS SmartLink or tools (e.g., LSI-R, EQ-i).



After you have selected a caseload in the Available Caseloads box by clicking on it once, you can click on the Add button to add the caseload to the Selected Caseloads box. Once this action is performed, the user can access this caseload when logging into MHS SmartLink or tools (e.g., LSI-R, EQ-i). To reverse the process, click on a caseload in the Selected Caseloads box. The Add button changes to a Remove button allowing you to move caseloads back to the Available Caseloads box.

To move more than one caseload at the same time, hold down the Shift button while clicking on the caseloads you want to move. Or, if you want to move all of the caseloads, click on the Select All button.

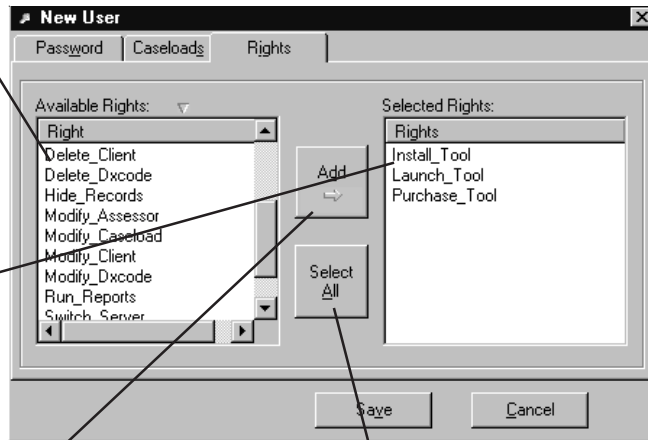
Rights Tab

The final step in setting up a user account is to define the user's access rights. When you allocate a specific set of access rights to a user, Administrator provides that user with access to the components of MHS SmartLink that you selected. The user will then be able to perform the MHS SmartLink functions that you allocated. On the other hand, a user for whom you have not enabled those access rights will find the corresponding MHS SmartLink functions disabled and he/she will find the corresponding menu options grayed-out on the toolbar. For example, you may authorize only a small selection of staff members to delete client and assessor files and administer assessments, while enabling every user in the caseload to create client files.

Regular users will normally have no access to Administrator but, if necessary, you can give another user the same rights as the system administrator by opening the Modify User dialog box and assigning him or her the right entitled "Administrator," as described in the section entitled *Modifying a User Account* later in this chapter. This user will then be able to access the Administrator program and perform user and caseload management tasks, such as defining the functions of MHS SmartLink to which other users have access. An illustration of the Rights tab is presented on the next page.

The Available Rights box lists all of the functions that can be performed from within MHS SmartLink. A right listed in the Available Rights box, indicates that the right has not been made available to this particular user. Each right is described in detail below.

The Selected Rights box lists all of the rights to which this particular user has access within MHS SmartLink.



After you have selected a right in the Available Rights box by clicking on it once, you can click on the Add button to transfer the right to the Selected Rights box. Once this action is performed, the user can access this right when logging into MHS SmartLink or tools (e.g., LSI-R, EQ-i). To reverse the process, click on a right in the Selected Rights box. The Add button changes to a Remove button allowing you to move rights back to the Available Rights box.

To move more than one right at the same time, hold down the Shift button while clicking on the rights you want to move. Or, if you want to move all of the rights, click on the Select All button, and when all the rights are highlighted you can click on the Add button to transfer all the rights to the Selected Rights box.

The access rights that you can set from the Rights tab of the New User dialog box are described below.

Add Dxcode refers to the right to add diagnosis codes and descriptions to the Diagnosis folder in MHS SmartLink.

Add Client refers to the right to add clients to the Client folder in MHS SmartLink and from within MHS tools.

Add Assessor refers to the right to add assessors to the Assessor folder in MHS SmartLink.

Administrator encompasses the right to access the Administrator program and perform user and caseload management tasks.

Caseload Preferences refers to the right to modify the information about caseloads and caseload preferences from Administrator and from MHS SmartLink.

Delete Dxcode refers to the right to delete diagnostic codes from the Diagnosis folder in MHS SmartLink.

Delete Client refers to the right to delete clients from the Client folder in MHS SmartLink.

Delete Assessor refers to the right to delete assessors from the Assessor folder in MHS SmartLink.

Install Tool refers to the right to install tools in MHS SmartLink.

Launch Tool refers to the right to launch tools from MHS SmartLink.

Modify Dxcode refers to the right to modify diagnostic codes from the Diagnosis folder in MHS SmartLink.

Modify Client refers to the right to modify client information in MHS SmartLink.

Modify Assessor refers to the right to modify the information for Assessors in MHS SmartLink.

Purchase Uses refers to the right to purchase tools from MHS SmartLink or from within MHS Tools.

Run Reports refers to the right to run administrative reports from MHS SmartLink.

Creating a New User Account

It is recommended that you create a separate user account for each person who will have access to MHS SmartLink and its tools (e.g., LSI-R, EQ-i).

To create a new user account,

1. From the View menu, select Go To; then click on Users Listing.

You will see a list of Users on the right side of the screen.

2. Click on the New option in the File drop-down menu, and then select User.

The New User dialog box appears. See p. 21 for a description of each field.

3. Enter a user name, full name, and account description (e.g., Doctor) into the appropriate fields. Note that the user name that you enter in the User Name field will be needed by the user to log into MHS SmartLink and tools (e.g., LSI-R, EQ-i).
4. Enter a password into the New Password and Confirm Password fields. Note that the password that you enter in these fields will be needed by the user to log into MHS SmartLink and tools (e.g., LSI-R, EQ-i).
5. Click on the Caseloads tab at the top of the dialog box.

The existing caseloads will be displayed in the sub-menu on the left-hand side of the dialog box.

6. Highlight the caseloads that you wish to make accessible to the user and click the Add button.

To move a caseload from the Selected Caseloads list back to the Available Caseloads list, click on an item under Selected Caseloads and click on the Remove button. This action prevents the user from having access to the caseload.

The caseloads in the Selected Caseloads list on the right-hand side of the dialog box are the only caseloads to which this user account will be allowed access.

7. Click on the Rights tab at the top of the form.

The Available Rights form appears, displaying all the rights that you can make accessible to the user.

For more detailed information about rights, see pages 23–25.

8. Highlight the Rights that you wish to make available to the user and click on the Add button.

The rights that you selected will be added to the Selected Rights list (explained on p. 28) on the right-hand side of the form and this user account will be allowed access to these rights only.

9. Click on the Save button.

Once you have created a new user name and password, enabled access to specific caseloads, and selected the required access rights, you have completed the creation of a new user account.

Modifying a User Account



Because organizations are dynamic, Administrator enables you to modify user account information to change password information, restrict or increase access to caseloads, and increase or decrease access rights.

To modify a user account,

1. From the View menu, select Go To, and then click on Users Listing.

To move a right from the Selected Rights list back to the Available Rights list, click on an item under Selected Rights and click on the Remove button. This action prevents the user from performing the function.

You will see a list of users on the right side of the screen.

2. Double-click on the user whose access rights you wish to modify.

The Modify User dialog box appears.

3. Modify information in the fields of the Password tab as desired.
4. Click on the Caseloads tab at the top of the dialog box.

The existing caseloads will be displayed in the sub-menu on the left-hand side of the dialog box.

5. To provide this user with access to caseloads, click to highlight the caseloads that you wish to make accessible to the user in the Available Caseloads list and click the Add button, or
 To deny this user access to caseloads, click to highlight the caseloads to which you want to restrict access in the Selected Caseloads list and click on the Remove button.
6. Click on the Rights tab at the top of the dialog box.

You will see the Available Rights and Selected Rights menus.

7. Select one of the following options:
 Highlight the rights in the Available Rights list that you wish to provide to the user and click on the Add button, or

- Highlight the rights in the Selected Rights list that you wish to deny to the user and click on the Remove button.

8. Click on the Save button.

You have now modified a user account. If MHS SmartLink was open when you changed the user's access rights, MHS SmartLink must be closed and reopened to reflect the change.

Sorting User Accounts

In Administrator Version 5 you can sort user accounts alphabetically by user name, full name, or description.

To sort user accounts,

1. From the View menu, click on Go To and then click on Users Listing.
3. Click on the column heading by which you wish to sort. A triangle appears beside the column heading.
4. Click again to reverse the order.

The user accounts will automatically be displayed in ascending alphabetical order.

Deleting a User Account

You can permanently delete user accounts. When you delete a user account, you simply remove the user name and password from the caseload; no client data is affected.

To delete a user account from Administrator Version 5,

1. From the View menu, select Go To and then click on Users Listing.

The Users folder will open and a list of user names appears.

2. Click to highlight the user account you wish to delete.
3. From the File menu, select Delete.

A dialog box will appear, prompting you to confirm that you want to delete this user account.

4. Click on the Yes button to confirm.

You have now permanently deleted this user's account from the caseload. This user will no longer have access to MHS SmartLink or its tools.

Working with Tools

5

This chapter describes the two different types of programs available in MHS SmartLink: per-use and unlimited use. It describes the process of ordering additional program “uses,” and transferring them. The chapter also describes the process of uninstalling a tool.

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About Uses and Installations

Each MHS SmartLink tool is equipped with a meter that monitors the number of “installations” (unlimited use) or the number of “scorings” or “uses” (per-use) available to the user.

The following describes these types of counters and is followed by instructions on how to purchase additional “installations” or “uses” from Administrator Version 5.

Per Use

“Per-use” programs work very differently from unlimited-use programs. You purchase individual uses, while the installation of the program itself is unlimited. You may install and run a per-use program on several different workstations at once, if you wish.

Purchased uses must be shared among users and caseloads. There is no way to electronically ration or protect uses that you have purchased. When you generate a report the program must first “score” the assessment/administration. Each time an assessment is scored, the uses meter is decremented by one. Once the uses meter reaches zero, you will be unable to score assessments, and therefore, you will be unable to generate new reports until you purchase additional uses.

On a network, all authorized users can run and use the same per-use program at the same time. However, they will only be able to score while there are uses remaining in the uses meter. Per-use programs that monitor “uses” include LSI-R and EQ-i.

MHS is not responsible for uses lost due to hard drive failure or other causes. MHS may be able to reinstate uses if you have performed a backup within the past 30 days.

Unlimited Use

“Unlimited use” means that once you have purchased and installed the product, you may use it an unlimited number of times with an unlimited number of clients. After you purchase the installation of the tool, uses (or “scorings”) for the tool are free.

If you want to provide several workstations on a network with access to the program at the same time, you will have to purchase a separate installation for each workstation.

Ordering Additional Uses and Installations

You can purchase additional uses or installations of a tool for another standalone computer or a network directly from Administrator Version 5, from MHS SmartLink, or from within the tool itself. The ordering feature eliminates the time and cost of shipping CDs and you will find this method to be secure, efficient, and reliable.

To order additional installations/uses from Administrator,

1. Click on the Tools menu item.
2. Click on the Purchase option in the drop-down menu.

The Purchase Uses/Installations dialog box appears as shown on the next page.

Purchase Uses/Installations

Reset Exit

1. Type the number of uses or installations you want to purchase for each installed tool.

Product Name	Amount On Ha...	Type On Hand	Order Amount	Order Type
LSI-R	222	Uses	0	Uses

2. Click on the Purchase Button to obtain an access code.

Purchase Access Code:

3. Call Multi-Health Systems to obtain a transaction code.

Contact Us Transaction Code:

4. Click on the Finish Button to refresh your uses/installations.

Finish

Current Server: J_MORRISON 1/30/01

3. Locate the tool for which you want to purchase additional installations/uses in the Product Name column.
4. Click on the Order Amount cell, and enter the number of uses you want to purchase. Note that you can only order uses or installations using this method for tools that are already installed on your system.
5. Click on the Purchase button.

The access code appears in the Access Code field.

6. Call MHS. Give the representative your name, credit card number, number of uses being ordered, and onscreen access code.
7. Enter the transaction code the representative gives you after verifying your access code.
8. Click on the Finish button.

The Amount on Hand column is updated automatically.

You have now ordered additional uses or installations. You can use them right away.

Contact MHS Customer Service
 in the U.S., 1-800-456-3003
 in Canada, 1-800-268-6011
 in the U.K., 0845 601 7603

Transferring Uses and Installations

Uses and installations can only be transferred from Administrator; they cannot be transferred from MHS SmartLink or from a tool (e.g., LSI-R, EQ-i). The Administrator transfer feature allows you to share tool uses or installations between standalone computers or network servers via the original key diskette. You should transfer uses back to the key diskette if you plan to upgrade your hard drive or make any other change that could damage installed software. Uses are automatically transferred back to the key diskette during the process of uninstalling MHS tools.

In order to transfer uses for a tool you must have the original key diskette for that tool; duplicated versions of the diskette will not work. You can transfer any number of remaining uses, including those purchased through the Administrator Version 5 ordering feature.

To transfer uses/installations from your computer to the original key diskette or vice versa,

1. Click on the Tools menu item.
2. Click on Transfer in the drop-down menu.

A popup box appears, prompting you to insert the key diskette.

3. Insert the MHS Tools Version 5 Key Diskette into your floppy drive (e.g., drive A:/ or B:/) and click on the OK button in the dialog box.

The Transfer Uses/Installations form appears.

4. If you wish to transfer uses from the key diskette to the network server or your standalone computer's hard drive, be sure that the blue arrow in the Transfer Uses/Installations form points from Key Disk to Server.

Similarly, if you wish to transfer uses from the server to the key diskette, the green arrow must point from Server to Key Disk.

Click once on the arrow to reverse its direction.

5. In the Transfer Quantity column of the Transfer Uses/Installations form, locate the cell for the tool whose uses or installations you wish to transfer. Then type into the cell the number of uses or installations that you want to transfer. The number must be less than or equal to the existing amount.
6. Click on the Transfer button.

When the transfer is complete, a dialog box appears informing you that the key diskette was updated.

7. Click on the OK button in the dialog box.

In the Transfer Uses/Installations form, the fields named *Amount on Key Disk* and *Amount on Server* are updated to reflect your transfer.

8. Click on the Exit button to close the Transfer dialog box.

You have now transferred uses/installations and you can use the new uses or installations immediately. You can reverse the transfer of the uses or installations at any time, by following the same procedure.

Uninstalling a Tool

When you uninstall a tool, you remove the software and dissolve the link between the tool and MHS SmartLink. The tool's icon will be removed from the Tools window, but references to the tool will remain in the Purchase Uses/Installations dialog box. Records for the tool stored in the MHS SmartLink Assessment History will no longer be alterable, although they will remain (unless you delete them from the tool's History window before you uninstall the tool). Further, you will no longer be able to access any of the tool's reports unless you printed or saved them before uninstalling the tool. You should perform a backup before uninstalling.

When you uninstall a tool from a client workstation on a network, the tool is deleted from the workstation but the data remains stored on the network server. To remove the data, you will have to repeat the uninstallation process from the network server.

Remaining uses/installations will be transferred back to the original MHS Tools Version 5 key diskette as part of the uninstall process.

If you want to uninstall all components of the MHS Professional Tool Suite (i.e., Administrator, MHS SmartLink, MSDE, and tools such as LSI-R, EQ-i), click on your Windows Start button, select Programs, MHS Professional Tool Suite, and click on Uninstall MHS Professional Tool Suite.

To permanently uninstall a tool,

1. Exit from all tools and from Administrator.
2. Access My Computer by double clicking the icon on your Windows desktop.
3. Click on the Control Panel icon.
4. Click on the Add/Remove Programs icon.

The Add/Remove Program Properties dialog box appears.

5. Find the tool you want to uninstall (e.g., LSI-R, EQ-i) from the list of programs to remove. Click on it once to highlight it.
6. Click on the Add/Remove button.

You are prompted to select the components of MHS SmartLink (i.e., tools) that you want to uninstall.

7. Click on the OK button.

You have permanently deleted a tool.

Working with Administrator Reports

The Administrator reports provide a way of gathering together and viewing all the caseload data or tool-related data in a single display. This chapter describes the different types of reports and how to process them. It also describes how to save, print, and close reports.

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Report Types

The administrative reports and their contents are described below.

Caseload Information Report

The Caseload Information Report contains the IDs and names for all the caseloads in MHS SmartLink.

On Hand Report

The On Hand Report lists all of the tools available in MHS SmartLink; it indicates which of the tools have been installed and the number of uses, installations, or previews available.

Usage Report

For each use of the tools in MHS SmartLink, the Usage Report shows the corresponding Caseload ID and Caseload Name, the transaction type and quantity, and the transaction date and time.

User Account Summary Report

The User Account Summary Report contains the login and full names, descriptions for each user, and the caseload IDs and caseload names to which each user has access.

Generating a Report

To generate a report from Administrator Version 5,

1. Click on the Reports menu.
2. Click on the report option in the drop-down menu that you require: Caseload Information, Activity Log, Remaining Uses, or User Account.

If you click on the Caseload Information option, a dialog box will appear; use this dialog box to stipulate the range of caseloads that you wish to display in the report and then click on the Run Report button.

Administrator generates and displays the report that you selected.

Saving a Report

Once a report has been generated and appears onscreen, you can save the report to a different directory and as a different file format. You can save an Administrator report as a Report Document Format file (*.RDF). Or, if you would like to save the file in a different format, you can export the report to a Portable Document Format file (*.PDF), a Rich Text Format file (*.RTF), a Microsoft Excel file (*.XLS), a hypertext markup language file (*.HTM), or Tagged Image File Format (*.TIF).

Note: If you save a report as an *.RDF file, you will only be able to view it from within the Administrator reports screen (you will not be able to open the file in a word processor). If you export a report to a *.PDF file, you will need to have Adobe Acrobat Reader installed on your system to view the file. If you export a report to an *.RTF file, you will be able to open and work with it from within a word processor such as Microsoft Word. If you export a report to an *.XLS file, you will only be able to open it in Microsoft Excel. If you export a report to an *.HTM file, you will be able to open the report using an internet browser. Finally, if you export a report to an *.TIF file, you will be able to open it in any graphics program such as Photoshop and Microsoft Office Document Imaging.

To save a report once it appears on your screen,

1. If you want to save the report as an *.RDF file, select Save As from the File menu.
 - If you want to export the report to an *.RTF, *.PDF, *.XLS, *.HTM, or *.TIF file, select Export from the File menu.

The Save As dialog box appears.

2. Select the drive letter to which you want to save the report.
3. Select the file folder to which you want to save the report
4. In the File Name field, type a file name and extension.
5. Click on the Save button.

You have now saved or exported a report.

Printing a Report

If you wish to print an Administrator report, check that your system is physically connected to the printer through cables or a network and that you have the correct print drivers installed.

To print a report,

1. Click on the Print button in the toolbar.

The Print dialog box appears.

2. Specify the printer, page range, and number of copies you wish to print.
3. Click on the OK button.

The report is printed to the printer you selected. If you find that it is taking a long time to print your report, you can speed up the process by closing all files and programs other than Administrator.

Closing a Report

Reports can be generated at any time but content may change over time. If you want to capture information covering a certain period of time, it is recommended that you save or print the report before closing it.

To close a report, click on the Close button in the toolbar.

Working with Options

7

This chapter explains how to fix the file integrity of your relational databases in the event that they become corrupted. In addition, the chapter explains how to use the Activity Trail to track the details, times, and dates of all transactions in Administrator.

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Fixing File Integrity

File integrity refers to whether your relational databases are intact and functioning properly. File integrity is typically corrupted by tampering with copy protection codes, although other factors can also corrupt your data. Be sure to have your MHS Tools Version 5 Key Diskette handy when following these instructions; depending on the nature of your problem you may be prompted to insert it in your floppy drive.

To fix file integrity,

1. Click on the Options menu item.
2. Click on the Fix File Integrity option.
 - If the file integrity is OK, you will see a dialog box containing the message "File Integrity is OK." Skip to step 6, or
 - If the file integrity requires attention, the Fix File Integrity dialog box appears, displaying a code number.
3. Telephone the MHS Technical Support department and tell them the code number.

The MHS Technical Support representative will also provide you with a code number.

4. Type the new code that the technical support representative provides into the Fix File Integrity dialog box on your computer.
5. Depending on the type of problem you are experiencing, the technical support representative may ask you to insert the MHS Tools Version 5 Key Diskette in your floppy drive.
5. Click on the OK button.

The file integrity will be repaired.

*Contact MHS technical support
in the U.S., call 1-800-456-3003
in Canada, call 1-800-268-6011
in the U.K., call 0845 601 7603*

Using the Activity Trail

The Activity Trail tracks who uses what in MHS SmartLink and its installed tools. For example, you can view the Activity Trail if you need to know who deleted a client file or who has been spending the scoring uses you purchased. Note that the Activity Trail is only effective when all users of the MHS Professional Tool Suite use unique user names.

To view the information in the Activity Trail,

1. Click on the Options menu.
2. Click on the Activity Trail option.

The Activity Trail form appears.

3. Select Caseload, Assessor, Client, User, Diagnosis Code, or Assessments from the Select View drop-down list to view the details, times, and dates of all the transactions carried out by users.
4. If you wish to re-sort the information in the Activity Trail screen, click once on the column header by which you wish to sort. You can also group a column by dragging the header to the top of the Activity Trail screen and dropping it into the space that is labeled “Drag a column header here to group by that column.” The information in the Activity Trail form will be grouped according to the column header you selected. You have now viewed the information in the Activity Trail.
5. Drag the column header back to its initial place in order to restore the form to its original view.
6. Click on the Close button to close the form.

You are returned to the Administrator screen.

Enabling and Disabling Password Protection

MHS SmartLink and tools (e.g., LSI-R) can be password protected, from the Administrator program, to prevent unauthorized personnel or clients from accessing sensitive client information. By default, password protection for MHS SmartLink and tools (e.g., LSI-R) is disabled, meaning that the Login dialog box does not appear when the programs are launched. You can change the default set up by following the instructions below. Note that the Administrator Login dialog box cannot be disabled.

To enable the login password for MHS SmartLink and tools (e.g., LSI-R),

1. From the Administrator program, click on the Options menu.
2. Select Enable Login Password.

Once this option is selected, a check mark appears next to the option. Repeat steps 1 and 2 to disable the password. The check mark disappears when the option is disabled.

You have now enabled or disabled the login password. If you enabled the password, the Login dialog box will appear each time MHS SmartLink or a tool is launched and the user will be prompted to enter a user name and password (the defaults are both **mhs**).

Administrator Online Help



This chapter provides an overview of the Administrator online Help and an illustration of the first screen you will see when you open the online Help. The illustration contains descriptions of all the buttons, tabs, and panes that you may need when you use the online Help. Other sections in this chapter describe hypertext jumps and popups and tell you how to print online Help topics and popup Help topics.

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Overview of Administrator Online Help

You can access the Administrator online Help once you have launched the Administrator program. Simply click the blue question mark button or select the Administrator Help option from the Help Menu. The Administrator online Help includes much of the information contained in this manual, with some additional details. If you cannot find a topic in this manual, you will probably find it by checking the online Help. All Help topics can be printed for reference. Over 200 topics are available through the Help Topics button, the Index button, or the Search button. Most topics contain links to related topics as well as to popup topics that provide descriptions of Administrator features, screens, and buttons.

If you are a registered user and you cannot find the information you need in the Help file, you can call MHS for technical support. In the United States or Canada, call 1-800-496-8324. In the U.K., call 0845 601 7603. Internationally, call 1-416-492-2627.

Sample Help Window

The following illustration depicts the opening screen of the Administrator online Help system. This screen provides links to all main topics as well as browse buttons and the Search and Index features. You will always have access to the buttons you see on the following illustration when the Help file is open, even after you have jumped to new topics. To familiarize yourself with the resources available in the online Help system, read the descriptions of the Help window's components, displayed on the opposite page.

Clicking on the See Also button presents a list of related topics.

Clicking on the Next button takes you to the next topic in the Help file.

Clicking on the Previous button takes you to the topic preceding the current topic.

Clicking on the Print button opens the Print dialog box, where you can specify printer settings and print the Help topic.

Clicking on the Back button takes you back to the topic you were previously viewing. Using this button you can retrace your browsing steps through the Help file.

Clicking on the Help Topics button hides the Navigation pane. The Topic pane expands to full size.

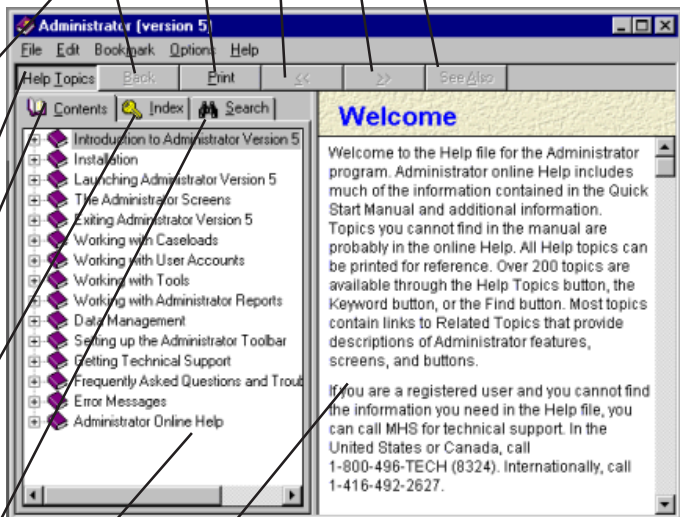
The Contents tab displays all topic titles in an expandable tree view. Click a topic title to view it in the Topic pane.

The Index tab (Keyword tab) provides access to the Help index.

The Search tab provides access to a full-text search (see *Using the Search Function*).

The Navigation Pane occupies the left side of the window. It contains three tabs—Contents, Index, and Search. Double click on books and topics to open them.

The Topic Pane displays text about each Help topic. If the topic extends beyond the window, scroll bars allow you to see the rest of the text.



Using the Search Function

There are two ways in which you can electronically search for the help topic you need: by using the Search tab or by using the Index tab. Each method is described next.

Search Tab



You can use the Search tab for a full-text search, as follows:

1. Click on the Search tab.
2. If it is your first time using the Search feature, the Find Setup Wizard appears. Follow the prompts onscreen to define your database.

The Search options appear.

3. Type the words you want to find in the empty text box.

A set of related words appears in the left pane.

4. Select one or more of the related words in the box to narrow the search.

A list of related topics appears at the bottom of the pane.

5. In the lowest box, double-click on the topic you require.

The Topic pane displays the topic text.

Index Tab



In addition to the Search tab, you can also use the Index tab (Keyword tab) to conduct a search, as follows:

1. Click on the Index tab.

A list of topics is displayed in the left Navigation pane.

2. Click on the topic you require.

Hypertext Jumps and Popups

There are two kinds of hypertext links in the Administrator Help: jumps (underlined by a solid line) and popups (underlined by a dotted line). The solid lines denote full jumps from the topic you are viewing to a completely different topic, related by subject to the one you just viewed. To return to the topic you jumped from, click on the Back button. The dotted underlining denotes popup topics that appear on top of the topic window you are viewing. Popups provide additional information about the topic you are viewing. To return to the regular topic under the popup, click anywhere on the Help window.

Printing Online Help Topics

You can print any of the online Help screens for reference. This is especially useful if you are performing a lengthy procedure, and you want a hard copy of the instructions to refer to. If you want to print the contents of a popup, refer to the next section.

To print an online Help topic,

1. Click on the Print button while the topic you want to print is in view.

The Print dialog box appears.

2. Verify that the printing options and click on the OK button.

You have now printed an online Help topic.

Printing Popup Help Topics

Popup Help topics disappear when you click the left mouse button. The following method of printing popups works around this situation by using the right mouse button to choose the print option.

To print a popup Help topic,

1. Click the right mouse button while the popup you want to print is in view.
2. Choose Print Topic from the floating menu that appears.

The Print dialog box appears.

3. Verify the printing options, and then click on the OK button.

You have now printed a popup Help topic.

Exiting from Administrator Online Help

Exiting from the online Help file returns you to the Administrator window from which you accessed the Administrator online Help.

To exit from online Help,

1. Click on the File menu.
2. Select Exit.

The Administrator window appears.

You can now continue working in Administrator

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Administrator Version 5 for Windows

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User Feedback—Documentation

We try to provide you with materials of the highest quality. After using this program and its documentation, please fill out the questionnaires on the front and back of this page. When finished, remove this page and mail or fax it to us. Please include any additional comments, suggestions, or concerns you have about either the documentation or the product. Your response will help us provide better programs and documentation in the future.

Program Name, Version Number: **Administrator Ver. 5**

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Address: _____

Phone Number: _____

Please rate the documentation in the following areas: (5 = Excellent; 1 = Poor)

	Software Manual	Online Help
Clarity of instructions:	1 2 3 4 5	1 2 3 4 5
Easy to read—brief and to the point:	1 2 3 4 5	1 2 3 4 5
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Quantity and quality of illustrations:	1 2 3 4 5	1 2 3 4 5
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Quantity and quality of screen displays:	1 2 3 4 5	1 2 3 4 5
Logical organization:	1 2 3 4 5	1 2 3 4 5
Amount of information provided (e.g., button descriptions, text on screens):	1 2 3 4 5	1 2 3 4 5
Report toolbar buttons and functions:	1 2 3 4 5	1 2 3 4 5
Report layout:	1 2 3 4 5	N/A
Report content:	1 2 3 4 5	N/A
Subcomponent content (wording or items):	1 2 3 4 5	1 2 3 4 5

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