Cleverex Systems, Inc.

PROMIS QUICK START GUIDE

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1

Accessing PROMIS

This Chapter outlines how to log into PROMIS using your web browser.

To access the PROMIS system and begin to enter, review, or edit information, you will need the following items available:

- A computer with Internet access.

- Internet Explorer version 5.5 or higher.

- Application Name†, User Name, and Password e-mailed by the PROMIS Support Staff at Cleverex Systems, Inc.

Logging into PROMIS

Open your web browser and type the URL:
https://promis.cleverex.com/headstart then hit ENTER.
This will open the Application Login Screen (see Figure #1).


(**FIGURE #1) Application Login Screen**

For **Application,** type your Application Name (e-mailed to you by Cleverex Systems). Click the **GO** button. The login screen will then appear (see Figure #2).

NOTE: If an incorrect Application name is entered, the Application screen will refresh ONLY. It will NOT proceed to the Login Screen.

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† Your Application Name allows the PROMIS system to identify which database will be used by your agency.

Type the User Name and Password and then click the **LOGON** button. If this is your first time logging in, a welcome screen will appear. On the Welcome Screen, click on the **CONTINUE** button.
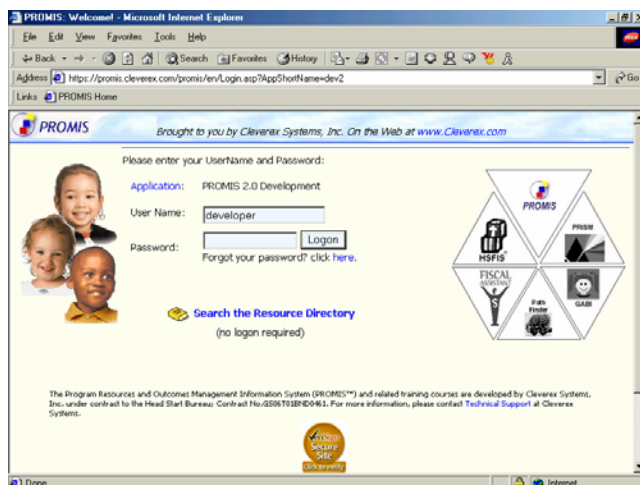
(FIGURE #2): Login screen

PROMIS will default to the Home screen (see Figure #3).

From this screen, a user will be able to navigate to any of the data entry screens or navigate through the system using the buttons located at the top of the screen.
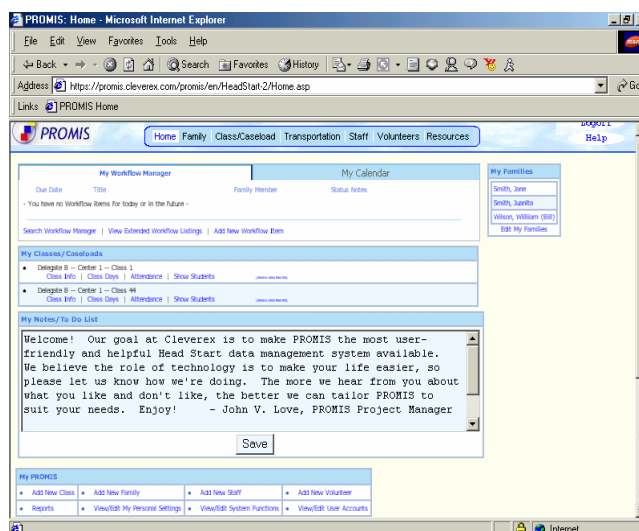
(FIGURE #3): PROMIS Home screen

The buttons are:

- **HOME: This link will display:**
    o My Workflow Manager/Calendar: Current Tasks for the current user in list or calendar format.
    o My Classes/Caseloads: Classes/Caseloads shortcuts list. (Initially empty)
    o My Notes/To Do Lists: Tasks entered by user to be completed

- o My Families: Another shortcuts list showing families the user frequently interacts with. (Initially empty)
- o My PROMIS: Links to commonly used features and personalized settings

- **FAMILY: Access Family Information including**
  - o Demographics
  - o Enrollment
  - o Health
  - o Child/Adult Development
  - o Family Development

- **CLASS/CASELOAD: Administer Classes and Caseloads**

- **TRANSPORTATION: Bus/Bus Route Management**

- **STAFF: Access Staff Information including**
  - o Staff Demographics
  - o Staff Employment
  - o Staff Training
  - o Staff Education
  - o Staff Health

- **VOLUNTEER: Access In-kind Information including**
  - o Volunteer Demographics
  - o Volunteer Timesheets
  - o Volunteer Donations

- **RESOURCES: Access Organization and Service Provider Information**

Chapter

2

Customizing PROMIS

This Chapter details how to configure PROMIS for your agency.

F rom the HOME tab, scroll to the My PROMIS box. Select the **View/Edit System Functions** link. This will bring you to the System Admin home page. (See Figure #4)

NOTE: The View/Edit System Functions link will only appear if the user has the proper access rights to System Administration.

The System Admin page allows a user to customize Agency information, set up user accounts, and change system information.

The following sections outlines the steps for the PROMIS System Functions:

• Entering Agency Information

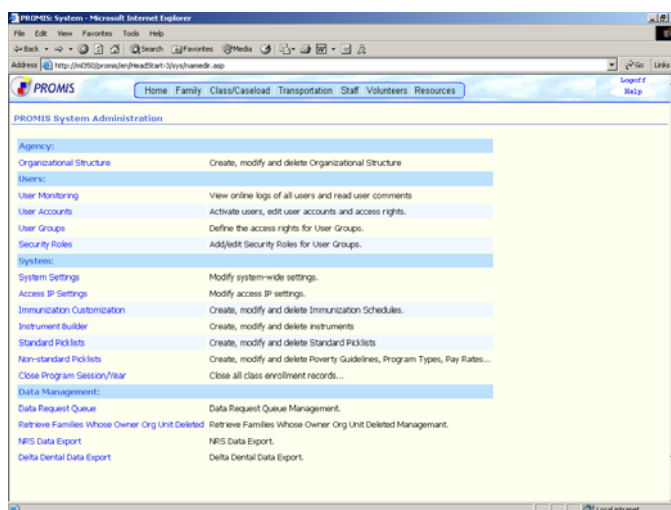• Entering Centers/Classes/Caseloads

• Entering User Information

FIGURE (Figure #4): System Function screen

Entering Agency Information

HOW TO ENTER/EDIT AGENCY INFORMATION

From the System Admin Screen, (see Figure #4), click on the **ORGANIZATIONAL STRUCTURE** link. This will display the Organizational Structure screen (Figure #5).

To enter your agency information:
1) Click the **name** of the grantee (See Figure #5). You can rename the Grantee entry to your agency name. (You will need to contact Cleverex Systems if you require more than one Grantee in your Organizational Structure). You **must** have a Grantee to continue entering the rest of the Organizational Structure.

2) Select the *Details* link next to the Grantee entry. This will bring up the Agency Information screen. Click the **Select Organization** button. This will open the Resource search page.

3) At the Organization search page, type the name of your agency and click **Search**.
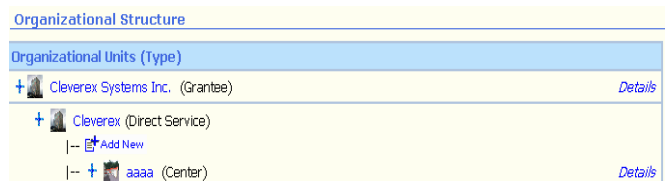
(Figure #5): Organizational Structure screen

4) Scroll through the results to find your agency name, and then click the **Select** button to the right of the agency name. This will close the search page and return you to the Agency Information screen.

The Agency Information is separated into:

- Agency Name and Address   (Figure #6)
- Agency Details (Figure #7)
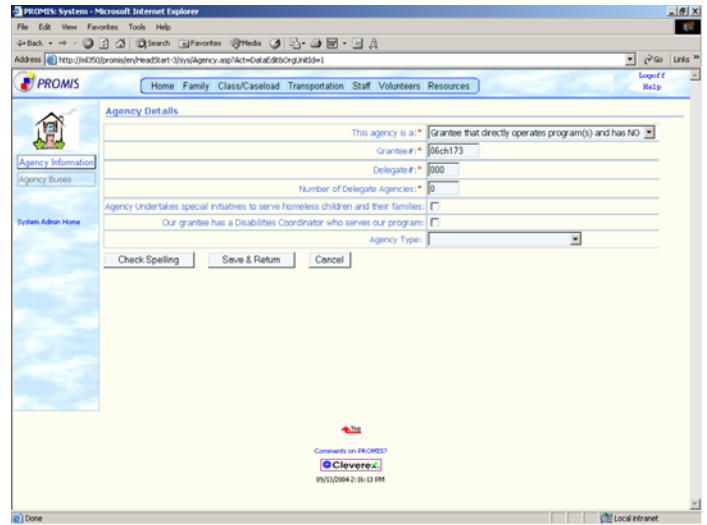- Program Sessions/Years (Figure #8)

Agency Name and Address:

1) Select the **Edit Agency Address** link.

2) Enter your agency's address information.

3) Click on the '**SAVE & RETURN'** button.
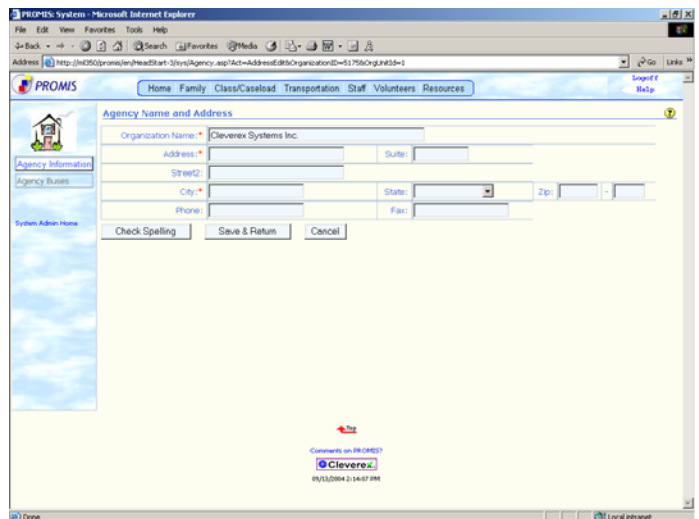
(FIGURE #6): Agency Name and Address

Agency Details:

1) Select the **Edit Agency Details** link.

2) Enter your agency's details. (Grantee number, agency type, etc).

3) Click on the '**SAVE & RETURN**' button.

(FIGURE #7): Agency Details

Program Sessions/Years:

1) Click the link(s) below the **Session** column (See Figure #8) to edit the current session information, or click the **Add New** link to add a new program session/year.

(FIGURE #8): Program Sessions/Years

2) Enter the program session information (start date, end date, etc.)

3) Click on the '**SAVE & RETURN**' button.

4) After saving the program year information, you can click the link(s) below the **Session** column in the **Program Sessions/Years** box to add funding information for that particular session.

5) Click the **Add New** link under the **Program Sessions Funding** window (Figure #9) to add the funding information for that program year/session.

(FIGURE #9): Program Session Funding

HOW TO ENTER/EDIT THE ORGANIZATIONAL STRUCTURE

The Organizational Structure allows the user to enter/edit the organization of the agency by:
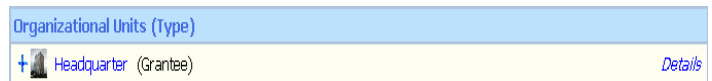
- Grantee
- Delegates/Direct Services (if applicable)
- Centers
- Classes/Caseloads (if applicable)

Using the hierarchy established, user access can be restricted to certain delegates/centers/classes. Complete access to the entire agency (Grantee level) is also possible.

From the System Function Screen (see Figure #4), click on the **ORGANIZATIONAL STRUCTURE** link. This will display Figure #5.

Enter Top Level Organizational Unit: This level will be for the agency grantee and delegates/direct services:

1) Click the **name** of the grantee (See Figure #10). You can rename the Headquarter entry to your agency name. (You will need to contact Cleverex Systems if you require more than one Grantee in your Organizational Structure).

(FIGURE #10): Top (Grantee) Organization Level

- Click *Details* to edit the agency information (see Entering Agency Information).

2) Click on the **SAVE** button to save the changes

NOTE: You cannot delete the Grantee entry.

3) Click the **Add New Top Level Organizational Unit** link to enter the Delegate/Direct Service (See Figure #11).

(FIGURE #11): Top (Delegate/Direct Service) Organization Level

NOTE: If your agency is the grantee, or does not have any delegates, you still must have an entry at the top level to begin entering the Centers. In this case, you will create a new entry for Direct Service and give it a name similar to your agency name. (We recommend using the agency acronym).

Enter Second Level Organizational Unit: This level will be for agency Centers:

1) Select the ✛ to expand the level beneath a particular Delegate/Direct Service. Click the ⊞Add New link to add a new Center to this Delegate/Direct Service.
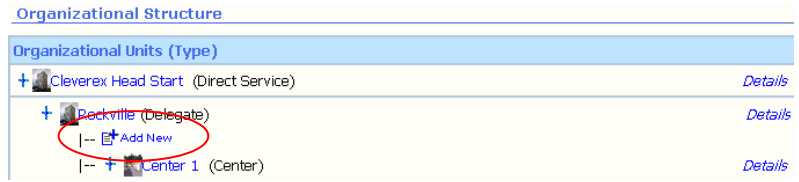

(FIGURE #12): Second (Center) Organization Level

2) Enter the name of the Center in the Organizational Unit Name box. Select the Type as Center. (See Figure #13).

3) Click on the **SAVE** Button to save the changes.

   Click on the **DELETE** button to delete the entry.

4) Click *Details* to edit the Center information (this information is necessary for the NRS report. Required fields are denoted with a *).
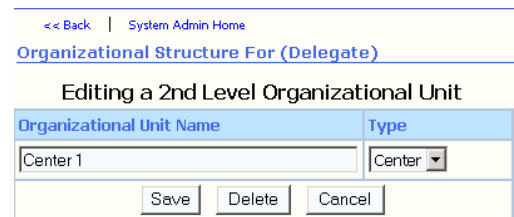
(FIGURE #13): Edit Center screen

5) Select the ⊞Add New link to enter more Centers under the Delegate/Direct Service.

6) Repeat Steps 1 through 4 until all the centers have been added under a particular Delegate/Direct Service.

7) Go to the next Delegate/Direct Service and repeat Steps 1 through 5.

Enter Third Organizational Level:
This level will be for agency
**Classes/Caseloads/Groups:**

(FIGURE #14): Third (Class) Organization Level

1) Select the ✚ to expand the level beneath a particular Center. Click the 🗒Add New link to add a new Class/Caseload/Group. (See Figure #14)

2) Enter the name of the Class in the Organizational Unit Name box. Select the Type as Class, Caseload, or Group (See Figure #15).

3) Click on the **SAVE** Button to save the changes.

   Click on the **DELETE** button to delete the entry.
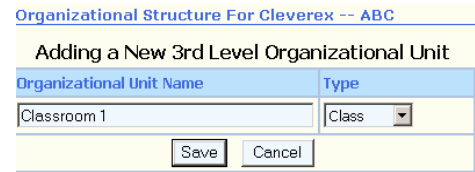

(FIGURE #15): Add Class Screen

Placing a classroom into a Program Session/Year:

1) Once you have saved the Class name and Type, click on the Class name from the Organizational Structure screen. This will open the Editing 3rd Level Organization Unit screen. (See Figure #16).
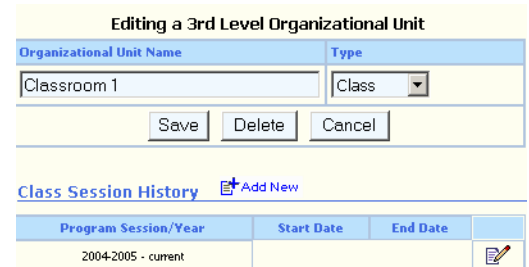
(FIGURE #16): Edit 3rd Level Unit screen

2) Click the 📝 icon next to the Program Session/Year in the Class Session History box. This will bring up the Class Information screen. (See Figure #17).

3) Click the 📝 Edit Class Information link. Choose the Program Year/Session that the class will operate in from the drop-down box. Enter the rest of the classroom information. (Required fields are denoted with a *).
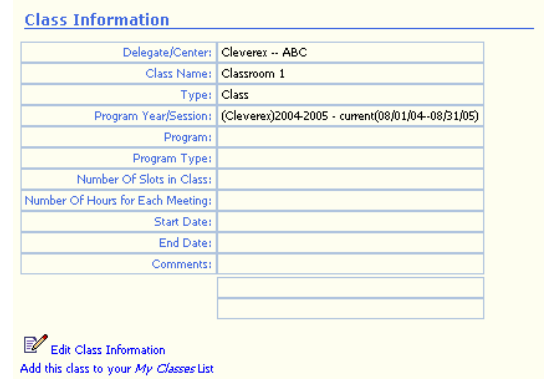
(FIGURE #17): Class Information screen

4) Click on the '**SAVE & RETURN'** button to finish entering the classroom information. You may now begin entering meeting days for the classroom using the Class Days link.

Entering User Information

To activate and configure users to access the PROMIS system, the following steps **MUST** be followed:

- Enter new Staff Name and Demographic Information

- Activate Staff as users

- Assign each User access rights, or assign each User to a Group

- Grant access to Delegate, Center, or Class

HOW TO ENTER NEW STAFF
From the HOME tab, click the **ADD NEW STAFF** link in the MyPROMIS box. This will display the Add a New Staff screen. (See Figure #18). You can also access this screen by clicking the Staff tab, and from the **STANDARD STAFF SEARCH** screen, click the **ADD NEW STAFF** link.

(FIGURE #18): Add New Staff screen

1) Enter the first and last name of the Staff member and click Continue. PROMIS will search your existing data to see if that staff member has already been added. If the staff member is not in the system, the Results list will be blank, and you will see Figure #19. You may either Search Again, or Enter this person.

(FIGURE #19): Add New Staff part 2

2) After selecting Enter this person, you will see the Staff Demographic screen (Figure #20). Enter the rest of the staff member information. (Required fields are denoted with a *). Click on the '**SAVE & RETURN**' Button to finish.

> **NOTE: If you enter an Email address for the staff member in the Demographic form, PROMIS will be able to email that person their password when their user account in activated. See the "Activating Staff as Users" section below.**

3) Repeat this process for all your staff, including those who will be activated as PROMIS users.

(FIGURE #20): Staff Demographics screen

The Standard Staff Search allows users to locate staff by entering first and last names. If these fields are left blank, the search engine will display all staff names.

Staff members you enter will appear in the Staff Search results, as long as the user has proper access rights to view them.

<u>ACTIVATING STAFF AS USERS</u>
From the top Tab Menu select the **HOME** link. On the Home tab, scroll down and select the **VIEW/EDIT USER ACCOUNTS**. This will display Figure #14. You can also access this screen by clicking **VIEW/EDIT SYSTEM FUNCTIONS** from the Home screen, and choosing **USER ACCOUNTS** from the System Admin menu.

The current staff will be listed on the screen in alphabetical order by last name. Staff without PROMIS access will have the status Inactive.

To activate a staff member as a PROMIS user, click on the **INACTIVE** link. A message will appear stating: "Do you want to Activate this user?" Click OK to activate the user.

Once the staff member has been activated, PROMIS administrator will be able to configure that staff member's access rights.
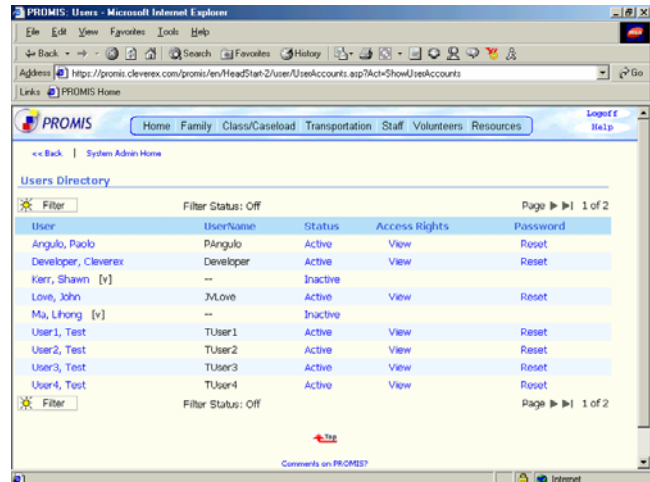
(FIGURE #21): User Directory screen

Using the User Name screen (See Figure #22), administrators can give new staff members a UserName. Enter the UserName for this staff member. (This will be the name the staff member enters to login to the PROMIS system).
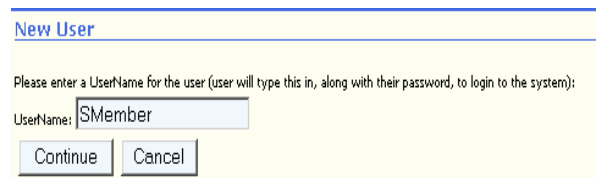
**(FIGURE #22): Staff User Name screen**

If the staff member has an email address entered into the Email field in the Staff Demographic form, PROMIS will default to using the email address as the staff member's UserName. If an email address has not been provided, PROMIS will default the UserName to the first initial and last name of the staff member.

NOTE: It is highly recommended to use an email address as the User Name.

If the Staff Member has an e-mail address, PROMIS will automatically e-mail the new user their password.

If the user does not have an e-mail address, the screen to the right (Figure #23) will appear, showing the user's temporary password. Click on the **CONTINUE** link to return to the User Directory.
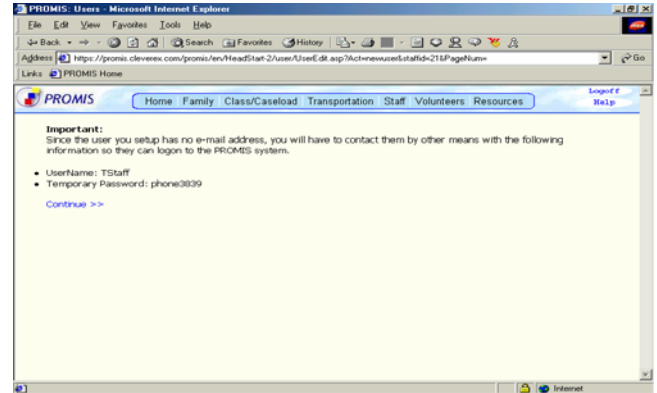

(FIGURE #23): Temporary Password screen

ASSIGNING USERS TO GROUPS

Groups are preset templates for user access. Instead of specifying specific screen access rights for each staff member, users can be assigned to a specific group. For example, users assigned to the Teacher Group will only have access to areas that fall under their responsibilities (i.e. Attendance and Meals).

From the User Directory, select the **VIEW** link under the Access Rights column. This will open the Access Summary Page for that staff member(See Figure #24). Click on the **GROUPS** link.
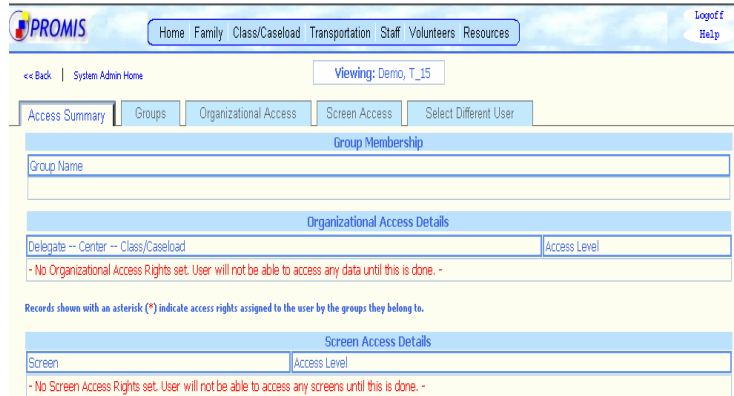

(FIGURE #24): Access Summary screen

Select the appropriate group for this user from the drop down menu.

A user can be assigned multiple groups; however, if the access rights between two groups conflict, then PROMIS will give the user the *lesser* of the two access rights. **It is recommended that users be assigned to only one group initially**. If additional rights are needed, they may be customized at a later date.

Once the staff member has been assigned to a group, click on the '**SAVE & RETURN'** button.
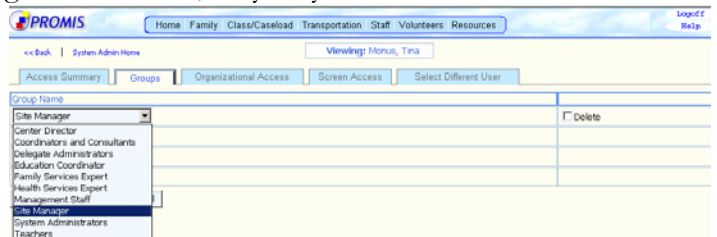
(FIGURE #25): Group Select screen

ASSIGNING USERS ORGANIZATIONAL ACCESS

Besides group access rights, which control what screens a user has access to, PROMIS can assign/restrict users to certain levels in the Organizational Structure. This is controlled from the **ORGANIZATIONAL ACCESS** link. Review the two options below:

OPTION #1: User requires access to the whole organization. This includes all Grantee/Delegate/ Center/Class sites.
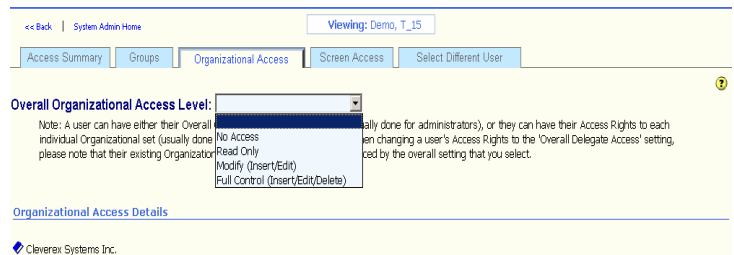
NOTE: This option is ONLY recommended for System Administrators, Directors, or other high level staff. This option should be used sparingly; otherwise, confidentiality of family information may be compromised.

From the User Directory, select the **VIEW** link under the Access Rights column. This will open the Access Summary Page (See Figure #24). Click on the **ORGANIZATIONAL ACCESS** link.

From the Overall Delegate Access Level (Figure #26) menu, choose the appropriate rights access for this user.

A message will appear stating "NOTE: Setting the Overall Access Level will delete any individual Organizational settings. The user's access will be determined by the Overall Setting alone. Do you want to continue?"

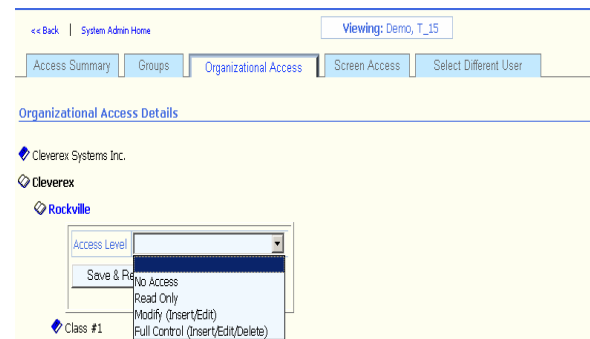**(FIGURE #26): Delegate Access screen**

Click the **OK** button to proceed.

OPTION #2: User only requires access to certain Delegates/Centers/Classes. Users can be given access to multiple delegates/centers/classes.

NOTE: This option is recommended for Data Entry staff or teachers who will only need to access certain areas, not the entire organization.

From the Organizational Access screen (see Figure #27), select the ◆ link to display the Delegate/Direct Service access level assignment menu. Choose the appropriate access level for this user.

(FIGURE #27): Delegate Access screen cont'd

If the user is being assigned access at a lower level (i.e. Center), select the ◆ link next to the center to which the user will be given access.

Access can be assigned access to the class level as well.

NOTE: **To grant users access to the lower (class) levels, they must be assigned an access right at the level above (i.e. Center). Thus, to assign a user full control to Class 1 in Center A, they would receive a Unrestricted or Restricted Read Access to Center A, and Full Control to Class 1.**

Repeat this process for all the Delegates/Direct Services/Centers/Classes to which the user requires access.