User Groups

All users in ECS must belong to a user group. The user group is where system access is defined. There are default user groups in the system but new user groups may be created. There is not a limit as to number of user groups allowed in the system.

Create a New User Group

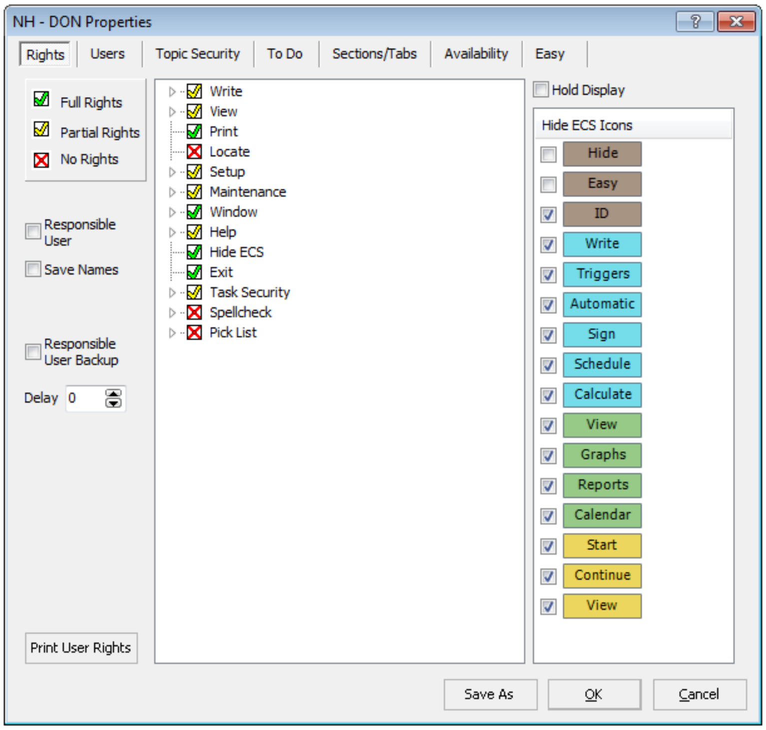
Although the below steps describe how to create a new user group from scratch, it is typically much easier to find an existing user group which is similar to the new one that is needed and complete a **Save As** on that group. Otherwise, every single option in the Rights tree needs to be reviewed if creating a new group from scratch.

1. Click **American Data - ECS** and follow the path **Setup > Security > User Group**.
2. Click the **New** button at the bottom of the screen.
3. Select site and click **OK**.
4. Type in the desired User Group name and click **OK.** (User groups should not be named with person's names. Appropriate names for user groups include department names [Maintenance], staff titles [Manager,] etc.)
5. Right-click on the user group that was just created and select Properties.
6. Make the desired selections on the Rights tab, Users tab, Topic Security tab, To Do tab, Sections/Tabs tab, Availability tab, and Easy tab.
7. Click **OK** to save the changes.

Rights tab

The selections are laid out in a tree-like format with selections becoming more specific. The tree is "opened" with the + signs. Be sure to open each of the + signs to obtain a clear picture of the items available for access within each group. This is where users security is controlled.

- The red X next to an area indicates that the users in the group will not have rights to that area/feature.
- The green check next to an area indicates that the users in the group have rights to the area/feature.
- The yellow check next to an area indicates that the users in the group have rights/access to some areas/features but not all.



It is recommended that security access be reviewed on a regular basis. Periodic changes to the program may include greater flexibility and control over access to various parts of the system. It would be advisable to take advantage of these changes as job responsibilities and regulations change.

Responsible User Settings

- **Responsible User:** Setting a user group to **Responsible User** allows a user in that group to select their "responsibility" at the beginning of their shift. As a responsible user, that individual can receive various alarms/communications regarding the residents that they are responsible for.
- **Save Names:** Setting a user group to Responsible User will also automatically select the **Save Names** checkbox in the user group setup. This means, that once a user picks their responsibility at the beginning of their shift, those names will be "saved" as their responsibility throughout their shift, so they do not need to re-select their responsibility every time they exit and log back into ECS.
- After the user is out of ECS for a four-hour time, the setting will "refresh" itself and the user will be prompted to pick a new responsibility upon logging in. ***Note***: You can use the "Save Names" feature on its own (saving names for subsequent logins until the user is logged out for four hours straight), without using the "Responsible User" functions.
- **Responsible User Backup:** To ensure that no resident's go without a responsible user, there is a user group property called Responsible User Backup. This user group is set to get all alarms/communications on resident's that do not have a responsible user, or for cases where that responsible user may not be logged in. You can not set a user group to "Responsible User" without first selecting a user group to be a "Responsible User Backup". In addition, once set, if a user goes to remove the "Responsible User Backup" setting from the only group set to this, the user will get a warning "Removing this check will clear all Responsible User groups, proceed?". Again, this ensures that there is always a Responsible User Backup set before using the "Responsible User" functions.

Rights Tree

The following is a brief description of the main sections of the tree (Write, View, Print, Window, Help, Setup, Maintenance, Hide ECS, System Locate, Exit, Task Security, Spellcheck, Pick List).

- **Write:** This area provides users the ability to complete documentation in ECS. Typically, only users who complete MDS documentation have rights to MDS screens, users who work with financial data have rights to financial screens, etc.
- **View:** This area provides access to viewing the various portions of the program. Access is typically given freely to most ECS users. Under Demographics and Filter users may be restricted to viewing residents on the resident list with only a certain status.

- **Print:** This area provides access to printing various portions of the program. Access is typically given freely to most ECS users.
- **Locate**: This setting applies only if you are using Single Client.
- **Setup**: This area provides administrators with access to setups within ECS. Some of the setups include user group rights, reports, and topics/words.
- **Maintenance**: This area provides administrators with access to maintenance utilities within ECS. Some of the maintenance portions include logs, interfaces, and various utilities.
- **Window:** This area provides staff the ability to re-arrange multiple screens. For example, if a view screen is open and an electronic MAR the user could have these screens "Tile Side by Side" so the user may view both screens at once.
- **Help:** This area provides staff with access to the various resources available within ECS regarding its use. Access is typically given freely to most ECS users.
- **Hide ECS:** This gives users the option to quickly hide their ECS screen (to protect patient information) should they need to step away from their computer momentarily.
- **Task Security:** This area provides access to setting up and using tasks. Tasks are short cuts established throughout the system. They define documentation, electronic sign screens, view screens, reports, etc. Access to the setup of tasks is typically limited to the System Supervisor. Access to loading tasks is typically given freely to most ECS users.

Hold Display

The icons appear under the Toolbar tab, which is always stationed as the tab furthest to the left at the top of ECS. The Hold Display setting dictates whether the icons are always visible or only when a user clicks on the Toolbar tab. If using Access screens, you may not want the icons to always be displayed. If you always want a user group to see the icons, select the **Hold Display** checkbox.

Hide ECS icons

On the right side of the Rights screen, there is an area called **Hide ECS Icons**. This area may be used to hide the icons across the top of the screen that the end user will no longer need because they can access that feature through buttons on their Access screens.

You will see all the ECS icons that the user needs rights to provide the functions that they have been given rights to in the rights tree. If you place a "x" in front of one of the icons, it will still provide the rights they need within the icon, but "hide" the icon, so that when they log into ECS they do not see the icon in their icon task bar. For example, the ID icon is needed by all users that have rights to pull up a resident list in ECS. However, the ID icon also provides a user access to demographic information such as social security number, birthdate, etc. In this case, even though the ID icon functions are needed by most, it can still be hidden from user groups that do not need to view or update a resident's demographic information.

Users tab

The Users tab displays two columns. The column on the left includes names of users who are assigned to the user group. The column on the right includes all users who are not assigned to the group.

To add users to the group

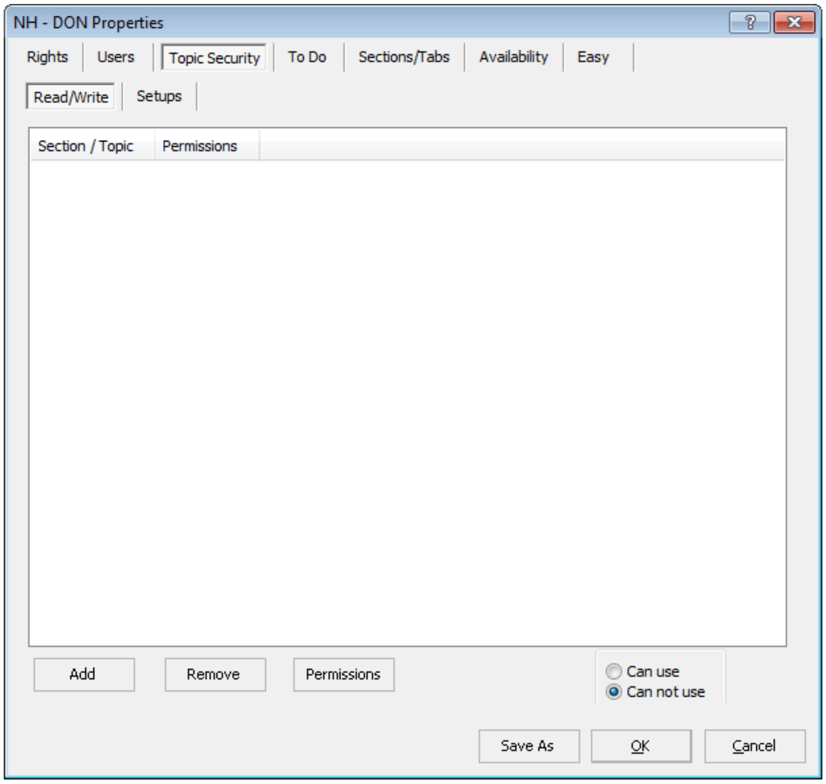
1. Highlight the name(s) in the right column (hold CTRL to select more than one name)
2. Click **<<Add**, then **OK** to save changes.
3. To remove users from the group
4. Highlight the name(s) in the left column (hold CTRL to select more than one name)
5. Click **Remove>>**, then **OK** to save changes.

Topic Security tab

The Topic Security tab allows for topic restriction from users. This is used when users need access to a section (for example Physician Orders) but they do not need full access to the section. Users may be given partial rights to topics here. They may be given access to read a topic but not write a topic.

To add a topic:

1. Click **Add** and select the desired section and select the desired topic(s).
2. Once the topic(s) have been added to the list, assign whether users "can use" or "can not use" the topic(s) listed.
3. Define partial rights by highlighting the topic and clicking **Permissions**.
4. Read/Write is the default. If partial rights are desired select the appropriate permission.



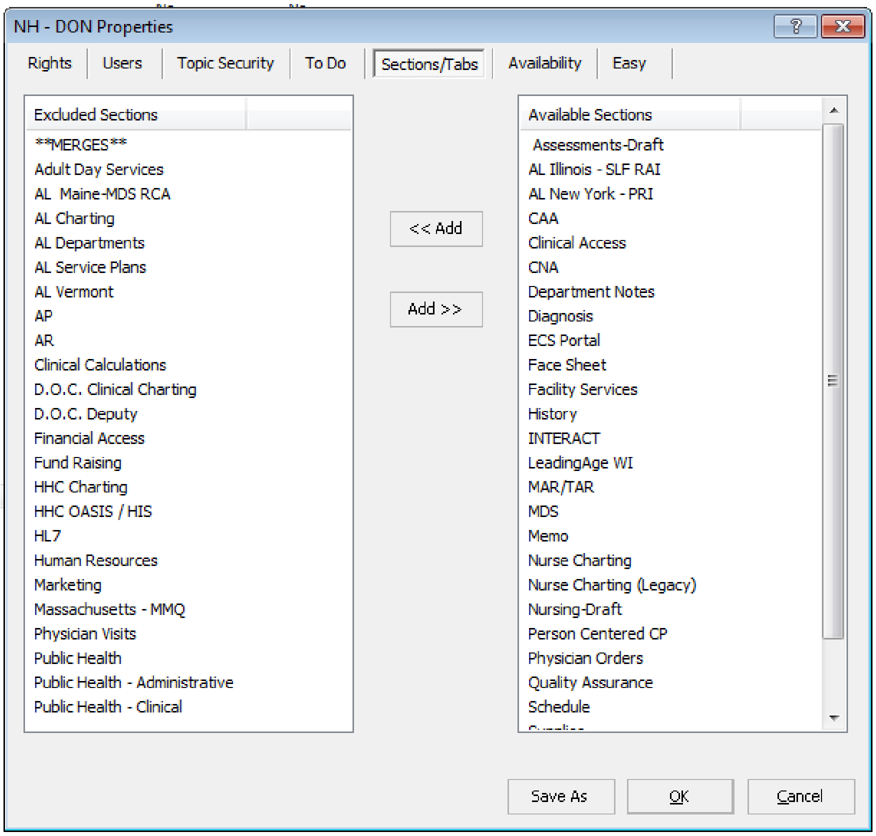
Please remember to take into consideration what was selected ("can use" or "can not use") because this affects the permission. For example, if "can not use" is selected and the partial right for "Write" is selected this means the user is not able to document (write) in the selected topic. To remove topics from the list, highlight the topic and click **Remove**.

To Do tab

To Do Lists are defined by the user group. Tasks are added to the To Do List tab in user group properties. For a write, electronic sign, or trigger task to be added to the To Do List, it must have the **Available for To Do** checkbox selected in the task setup.

1. Click **American Data - ECS** and follow the path **Setup** > **Security** > **User Group**.
2. Right-click the user group that needs a To Do List set up.
3. Select Properties.
4. Click the To Do tab.
5. Select the Task Type (only one type of task may be added at a time).
6. Click Add.
7. Select the tasks to add to the To Do List. You can select multiple tasks by holding CTRL.
8. Click **OK**.
9. Select another type of task to be added and repeat steps 6-8 until all desired tasks have been added.
10. Click **OK** to save the changes.

One To Do List may be set to run automatically upon startup. To assign a To Do to automatically run, highlight the To Do task and select the **Run Automatically at Start up** checkbox. If the users are restricted from some residents, select the **Use Default Names** checkbox so that the report is generated only for the users' default resident list.



Sections/Tabs tab

The Sections/Tabs tab allows for section restriction from users. This is used when users do not need access to a section (for example Physician Orders). When sections are restricted from users, they do not see that they exist in ECS. They do not have rights to view, print, or document information from the excluded section. To exclude sections, select the desired sections from the Available Sections column and click **<<Add**. To give access to a section highlight the section in the Excluded Sections column and click **Add>>**. Click **OK** to save the changes.

Availability tab

This tab has options for identifying which Site(s) have access to the user group. To add a site click **Add** and select the site from the list. To remove a site select it in the list and click **Remove**. There are three checkboxes at the bottom of the screen.

- **Group is only available to Users assigned to All sites** is used to add security when multiple facilities are sharing an ECS database.

- Group is available for Temporary Users allows temporary users to be added to the group.
- Group is available for Assigned Users Only allows only assigned users to be added to the group.

Easy tab

1. Click on the picklist box to select the Access topic you wish to link to this user group. Only one topic may be selected.
2. Move to the bottom of the screen to address the checkboxes.
    - Hide Names Panel - The name panel that is displayed on the left may be hidden by default. The user can then bring it up simply by holding his/her mouse over the left margin of the Access screen.
    - Run on Logon - Decide if you want the Access screen to run automatically when the user logs in. If so, select this option.
    - Double Space Names - Selecting this checkbox will double-space the names on the left side of the Access screen as well as on the Name Selection screen. This is useful if you are using touch screens.
    - Maximum Display - This is an Auto-sizing feature that "maximizes" each menu and sub-menu as it is loaded. This eliminates scroll bars and is therefore a desirable feature. On a screen with very few buttons, the buttons will be enlarged. On a screen with a lot of buttons, the button size may be reduced. For a consistent appearance we try to create only 8 buttons across the top of all menus, even if all buttons are not used, and up to 7 buttons vertically (a 56-cell grid).
    - Skip Name Selection - When the Access screen loads, consider whether the user should start by selecting his/her default residents. For example, it makes sense for a CNA or Nurse, working with a selection of filtered residents, to select residents at the start. On the other hand, a Nursing Director's Access screen may be used as a tool for chart review/audits and running reports on many residents, including filtering for discharged residents, so it may not make sense for him or her to load residents right away, but rather set up each button to open a new resident list.
3. Finally, if you want a particular common task to run when the Access screen loads, to filter the resident name list, select it in the Common Task area and click <<Add to add it to the Attached Common Tasks. (This might be used for CNA Charting.)
4. Click OK when you are done, to save your changes and close the User Group properties.

Edit User Groups

After establishing the user groups, it may be necessary to make changes.

1. Click American Data - ECS and follow the path Setup > Security > User Group.

2. Right-click on the user group that needs editing.
3. Select **Properties.**
4. Make appropriate changes and click **OK** to save the changes

Changes may be made to multiple user groups at the same time if the changes are the same. These are called "global" changes/setup.

1. Click **American Data - ECS** and follow the path **Setup > Security > User Group.**
2. Highlight multiple user groups
3. Right-click on any of the highlighted user groups and select **Properties.**
4. Make appropriate changes and click **OK** to save the changes. Global setup works for the Topic Security, To Do, Excluded Sections, and Tasks tabs only. Rights and Users may not be altered globally.

Copy User Groups

There may be times when a new user group needs to be created with similar rights/access as another user group that already exists. Instead of creating the new user group from scratch it is possible to copy an existing user group. All setups of the user group copy over except the Users tab.

1. Click American Data - ECS and follow the path Setup > Security > User Group.
2. Right-click on the existing user group that is to be copied and select Properties.
3. Click Save As.
4. Select the appropriate site and click OK.
5. Name the new group and click OK.
6. Right-click on the group that was just created (it appears in the list alphabetically)
7. Select the Users tab and add desired users.
8. Make appropriate changes to other areas of the user group properties (refer to the Create a New User Group section if unfamiliar with user group properties).

Rename User Groups

1. Click American Data - ECS and follow the path Setup > Security > User Group.
2. Right-click on the user group that is to be renamed.
3. Select Rename.
4. Enter the new name and click OK.

Tasks/Reports

Controlling Rights to Run Tasks

Common, Sort, Document, View, Trigger, Report, Calendar, Scheduler, and Financial tasks

To give a user access to run these task types:

1. Click **American Data - ECS** and follow the path **Setup > Security > User Group.**
2. Double-click on the desired user group.
3. On the Rights tab, click the + next to Tasks, then the + next to the desired task type, and place a green checkmark next to Load.
4. Click **OK** to save your changes.

Sign Tasks

To give a user access to view sign tasks:

1. Click **American Data - ECS** and follow the path **Setup > Security > User Group.**
2. Double-click on the desired user group.
3. On the Rights tab, click the + next to Write, then the + next to Electronic Sign, and place a green checkmark next to View Entries. Next, click the + next to Buttons, and place a green checkmark next to Name AND Tasks.
4. Click **OK** to save your changes. **NOTE:** This will only give the user rights to VIEW a sign task, additional rights will be needed if the user also needs to sign off on items in the task.

Controlling Rights to Run Reports

General Reports, Graphs, and Financial Reports

To give a user access to run general reports, graphs, and/or financial reports:

1. Click **American Data - ECS** and follow the path **Setup > Security > User Group.**
2. Double-click on the desired user group.
3. On the Rights tab, click the arrow next to Print and place a green checkmark in Reports, Graphs, and/or Financial Reports.
4. Click **OK** to save your changes.

Tasks/Reports Screen

To give a user access to control which specific tasks and reports a user group has, click **American Data - ECS** and follow the path **Setup > Security > Tasks/Reports.**

Filters - Current

This area is divided into four sections: Types, Site, Groups, and Task/Report. The three sections: Types, Site, and Groups serve as filters. The user selects one of the types, sites, or groups to define the list to display. A minimum of one from one of the three filters is required. You can select multiple options in multiple filters if you desire. After selecting the desired filters, click **Display**. The results of the filter appear in the list in the Task/Report section.

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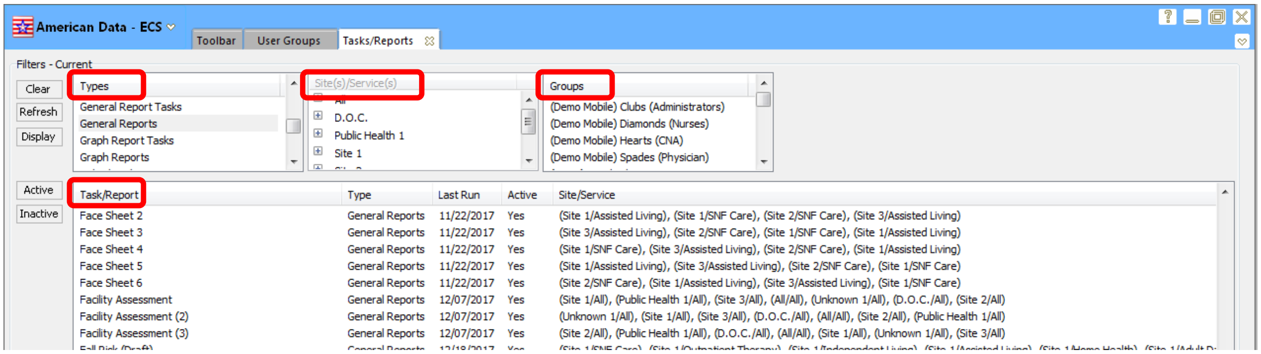

Adding/Updating/Removing rights to a SINGLE task or report:

1. Select your desired filters and click **Display** or **Refresh**.
2. You will be displayed with your desired selection in the Task/Report box.
3. To change the rights, right click on the desired task or report and select **Edit**.
4. The editing screen has two boxes to assist in controlling the rights to the selected task or report.

Adding a site:

1. Click **Add** just to the right of the Site box.
2. Choose the site you would like to add. Hold CTRL to select multiple sites.
3. Click **OK** on the Site Picklist screen

Removing a site:

1. Highlight the site you would like to remove. Hold CTRL to select multiple sites.
2. Click **Remove** just to the right of the Site box.

Adding a group:

1. Click **Add** just to the right of the Group box.
2. Choose the group you would like to add. Hold CTRL to select multiple groups.
3. Click **OK** on the User Group Selection screen.

Removing a group:

1. Highlight the group you would like to remove. Hold CTRL to select multiple groups.
2. Click **Remove** just to the right of the Group box. (When you are finished with all of the changes you would like to make, click **OK** on the Task's Sites/Group screen to save your changes.)

Adding rights to MULTIPLE tasks or reports simultaneously:

1. Select your desired filters.
2. Click **Display** or **Refresh**.
3. You will be displayed with your desired selection in the Task/Report box.
4. Hold CTRL on the keyboard and select all of the items that you would like to add a site or user group to.
5. Right-click on one of the highlighted tasks/reports and select **Edit**.

6. At the bottom of the edit screen, make sure the Add option remains selected.
7. Add a site or user group as described above. NOTE: You will need to click on the Add button twice to add something when editing multiple tasks/reports at a time.
8. Click **OK** to save your changes.

Updating rights to MULTIPLE tasks or reports simultaneously:

1. Select your desired filters.
2. Click **Display** or **Refresh**.
3. You will be displayed with your desired selection in the Task/Report box.
4. Hold CTRL on your keyboard and select all of the tasks/reports that you would like to change the site or user group rights on.
5. Right-click on one of the highlighted tasks/reports and select **Edit**.
6. At the bottom of the edit screen, select the **Replace** option.
7. Add a site or user group. When using the "replace" feature, make sure that you choose ALL of the sites or user groups you would like to have rights to the selected tasks/reports. NOTE: You will need to click on the Add button twice to add something when editing multiple tasks/reports at a time.
8. Click **OK** to save your changes.

Removing MULTIPLE tasks and/or reports from user groups:

1. Select your desired filters, making sure to select a filter from the "groups" area.
2. Click **Display** or **Refresh**.
3. You will be displayed with your desired selection in the Task/Report box.
4. Hold CTRL on your keyboard and select all of the tasks/reports that you would like to remove from the displayed user group(s).
5. Right-click on one of the highlighted tasks/reports and select **Remove**.
6. All of the selected tasks/reports will be removed from the selected user group(s) simultaneously.

Filters - All

This area is divided into two sections: Types and Task/Report. Choose the desired Type(s) and click **Display**.

Updating a single task/report:

1. Select your desired filter type(s) and click **Display** or **Refresh**.
2. You will be displayed with your desired selection in the Task/Report box.
3. To change the rights, right click on the desired task or report and select **Edit**.
4. Add or remove site and/or user group rights as described above.

Updating MULTIPLE tasks/reports simultaneously:

1. Select your desired filter type(s) and click **Display** or **Refresh**.
2. You will be displayed with your desired selection in the Task/Report box.
3. Hold CTRL on your keyboard and select all of the tasks/reports that you would like to change the site or user group rights on

4. To “add” sites/user groups that you would like to have access to these tasks/reports, follow the same steps described above.
5. To “replace” what sites/user groups have access to these tasks/reports, follow the same steps described above.