Adding Items to Portal

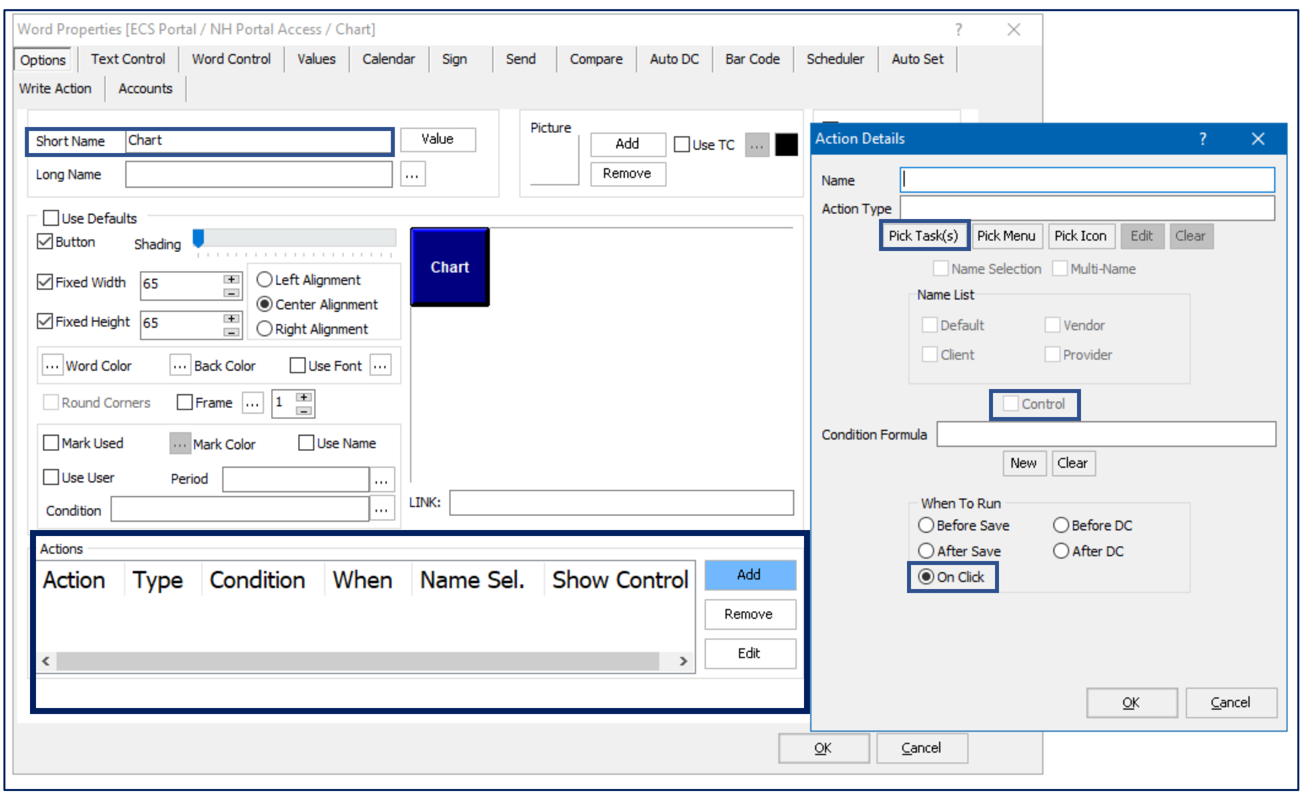
On the Access Screen

Adding Buttons to the Portal Access Screen

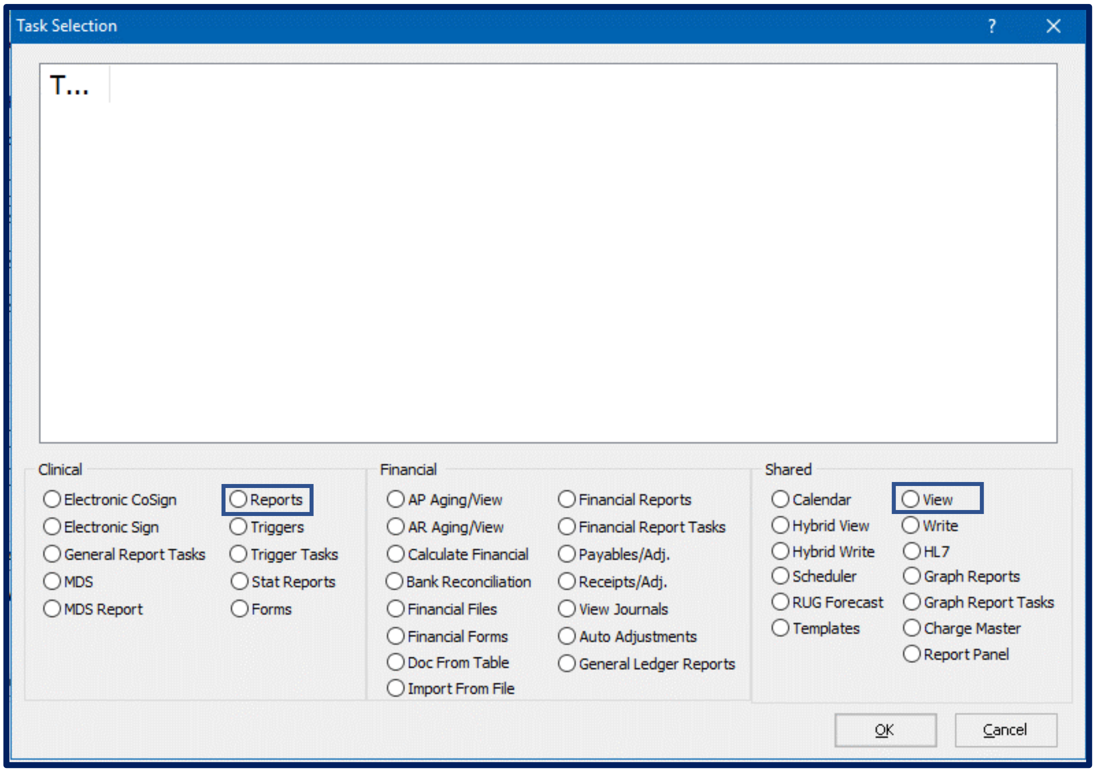
1. Near the top of your ECS window, choose "Toolbar" to display your ECS Icons, and then choose "Setup" from the list.
2. Choose "ECS Portal" from the tabs displayed at the top of the screen.
3. Double-Click into "NH Portal Access" for Nursing Home Portal users, and "AL Portal Access" for Assisted Living Portal users.
4. Choose any of the buttons and Right-click, and then choose "copy" from the list of options that appears.
5. Right-click in an empty space and click "Paste."
6. Double-Click on the new button that you just created to open the "word properties" Screen.
    a. Click into the box next to "Short Name." Backspace out the existing name and replace with the word or phrase that you would like displayed on the new button. Click okay to save the change.

Add a Task or Report to the New Button

1. Double-Click on your new button to open the 'Word Properties' screen.
2. Word Properties will open with the "Options" tab displayed.
3. Look for the "Actions" box near the bottom of the screen.



4. If there is an action already listed there:
    a. Click on the existing action in the box and then choose "remove" from the options on the right.
5. Once the 'action' box is empty:
    a. Select "add" from the options on the right.
    b. Then Select "Pick Task(s)"



        i. From the box that comes up, click in the radio button next to the type of task that you are looking for. For portal users this will typically be either:
            1. Reports – To display any report that could be found by using your green "reports" button.
            2. View – To display any view task available on a view screen.
        ii. Once you have chosen a category, scroll through the list at the top of the screen to locate the specific task that you are wanting to attach.
        iii. Click "OK" to save this choice and go back to the 'Action Details' screen.
            1. On this screen, ensure that 'on click' is checked beneath 'When to Run.'
            2. If you would like the user to be able to choose the dates for the view task or report, select "control" in the center of the screen.
            3. Click "OK" in the bottom right to save changes.

Before You Go

1. Click onto the "Word Control" tab at the top of the 'Word Properties' screen.
2. Look at the box in the bottom right, labeled 'Goto Topics/Word.'
3. If there is a word in this box, click on it, and then click "Remove."

4. A button can not be both a "Goto" and an "Action" button, so it is important to verify that there is only either a report/task in the Action box OR a word/topic in the Goto box.

Finish Up

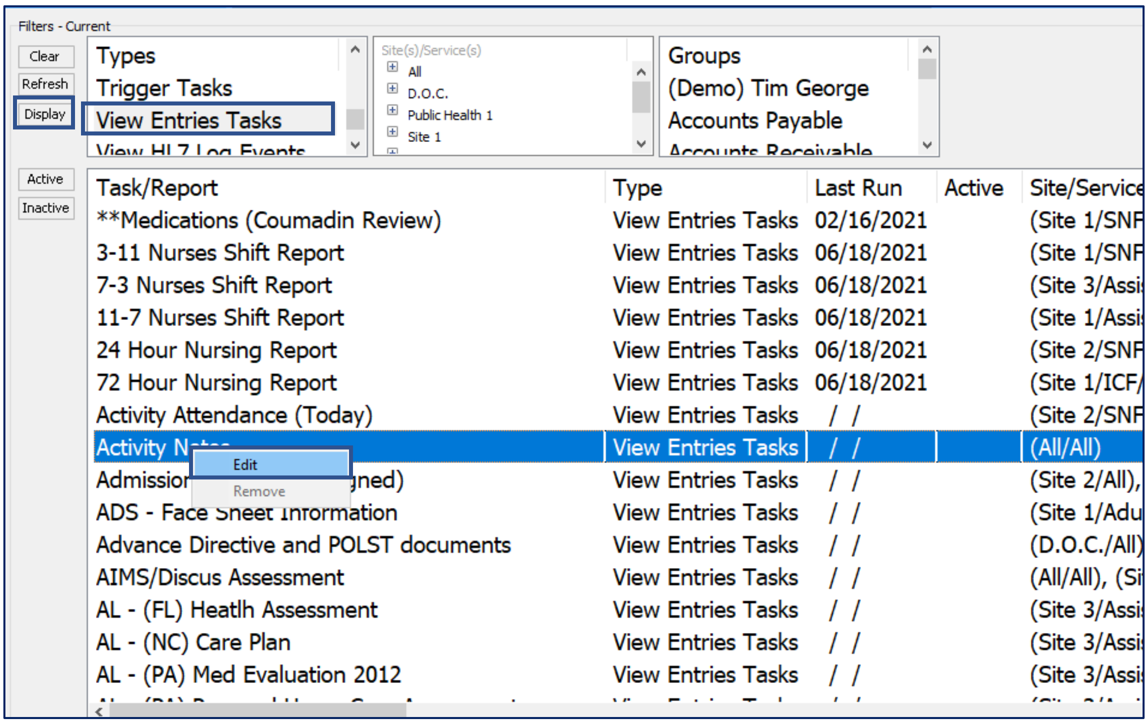
1. Click "OK" to save changes and close the 'Word Properties' box.

Grant Permissions to Users

By Default, Portal users do not have many rights in ECS. If you add buttons with additional tasks or reports to their screens, you will also need to grant permissions for them to use these.

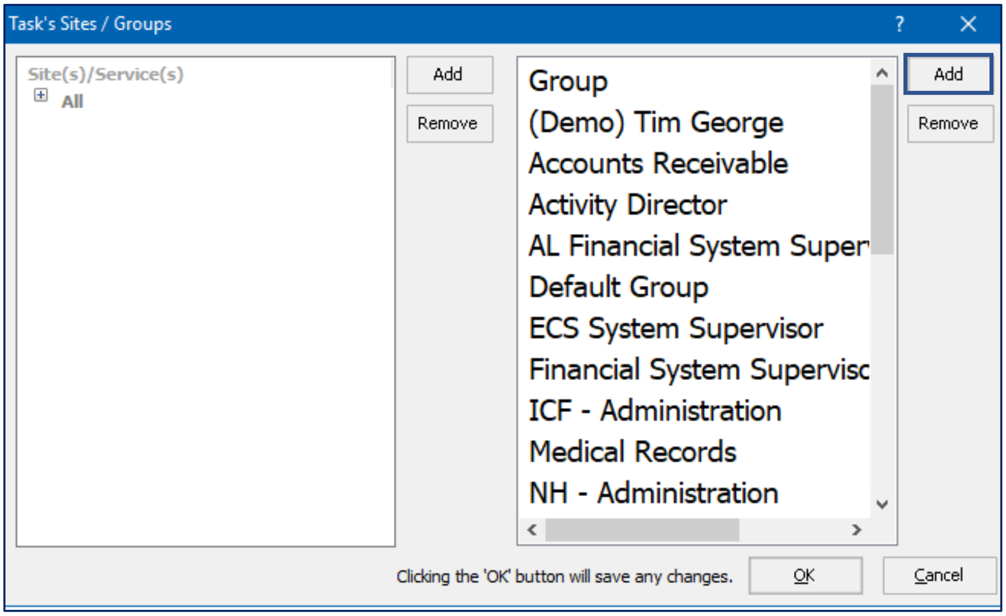
Use Task/Report Security

1. Go to 'American Data – ECS >Setup > Security > Tasks/Reports'



2. In the Top Left, under Types:
    a. Select "View Entries Tasks" if you added view tasks to Actions.
    b. Select "General Reports" if you added "Reports" to Actions.
3. Select "Display"
4. Items of the selected type will show up in the large box in the middle of the screen.
5. Scroll to locate the task or report that you would like portal users to have access to.
6. Right click on the task or report and select "Edit."

7. A "Task's Sites/Groups" screen will pop up.



   a. On the right, next to 'Group,' choose "Add."
   b. Select the portal user group from the list, and click "OK"
   c. Click "OK" on the "Task's Sites/Groups" Box to save your changes.

8. Repeat steps 2-7 for all tasks and/or reports that you would like portal users to have access to.