

How to Add a New Database User

To add a user to The Clubhouse Database:

- 1) Check to see if the individual already has a personal folder:
 - a. Open the Personal Folder module and navigate to the Administration Panel.
 - b. In the “Change Affiliations” area of the panel, check the “Everyone” pulldown menu. If you find the individual’s name, a personal folder has already been created.
- 2) Return to the Personal Folder Module’s Data Entry Panel.
- 3) If a personal folder already exists, Use the “Open a Personal Folder” pulldown menu to open it:
 - a. Find and select the name on the pulldown menu.
 - b. Press the [Enter] or [Tab] key.
 - c. If you don’t find the individual’s name on the “Open a Personal Folder” pulldown menu, adjust the radio buttons immediately above the pulldown menu to modify data visibility.

If a personal folder DOES NOT already exist, create one:

- a. Press the “Create a New Personal Folder” button.
- b. Then, on the “New Personal Folder Control Panel”, identify the primary affiliation which the individual has with the clubhouse and press the appropriate button.
- c. When creating a new folder, the individual’s first and last names (in reverse order) should be entered immediately.

The screenshot shows the 'Personal Folders' interface. At the top, there's a header bar with 'Personal Folders' on the left and 'Reporting Sub-Group' with a dropdown menu set to 'Your Clubhouse' on the right. Below the header, on the left, is a yellow sidebar with buttons for 'Show Main Menu', 'Data Entry', 'Reports', 'Contact Management', 'Admin. Tools', 'Active Status', and 'Help'. The main area is titled 'Data Entry Panel' and contains several sections. At the top of this panel are two buttons: 'Enter Existing Folders' and 'Add'. Below these are radio buttons for 'Open a Personal Folder' and a 'Data Visibility for Editing' dropdown. A button labeled 'List Currently Affiliated People' is next to the radio buttons. Below that is a dropdown menu with the text 'Last name first, Enter to select'. To the right of this section is a button labeled 'Create a New Personal Folder'. At the bottom of the panel, there are two large red arrows pointing upwards. The left arrow is labeled 'Open' and points to the 'Open a Personal Folder' radio button and the dropdown menu. The right arrow is labeled 'Create New' and points to the 'Create a New Personal Folder' button.



- 4) Give the individual a password (new Staff folders are automatically given the default Staff password listed in the Configuration module):
 - a. After checking the Last and First name fields on the “Home” tab, navigate to the “Permissions” tab of the personal folder.
 - b. Click the “Change User’s Password” button. Then where indicated, type in the password of the CURRENT DATABASE USER, followed by the folder owner’s new desired password (see images below).
 - c. If the password does not meet the minimum standards set for your facility, it will be cleared and you will receive a warning message indicating the identified shortcoming. If this occurs, you can choose to either strengthen your new password selection or cancel the process (leaving the old password active).

Staff: Straitor, Adam Close

Home | Staff Status | Tags | Emergency Contact | General Medical | Providers | Insurance | **Permissions**

Database Permissions:
 User Level: ☐ Member ☐ Worker ☒ Staff ☐ Admin ☐ JAWS
 NOTE: Refine default User Level permissions by making additional restrictions below.
 Menu Name Order: Firstname Initial Lastname
 Report Name Order: Lastname Firstname Initial

Change User's Password Language: English

	Special	Personal Folders	Goals	Education	Attendance	Employment	Supports
Administrative		Permissions			Holidays & Activities		
		<input type="checkbox"/>			<input checked="" type="checkbox"/>		
	Existing Personal Folders						
Data Entry	User Interface/Menus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Assignments	Supports
	<input type="checkbox"/> All Other Data Entry	<input checked="" type="checkbox"/>				Paychecks	Outreach
		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports	Confidential	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>						
Read/Write Own Records		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Module Access	Custom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>						

The image shows a Windows-style dialog box titled "Password Change Form". Inside the dialog, there is a section titled "Authorization: Password of logged in database user." followed by a text label "Your Password" and a text input field. To the right of the input field is a button labeled "Unmask". Below this is another section titled "Create a new password for the owner of this personal folder." followed by two text labels: "New Password" and "Verify New Password", each with its own text input field. To the right of the "New Password" input field is a button labeled "Unmask". At the bottom of the dialog are two buttons: "Change Password" on the left and "Close" on the right.

- 5) Adjust the individual's permissions (Administrators only):
- The maximum permissions for a User Level are set by default when the User Level is changed.
 - The administrator may then fine tune the permissions by unchecking (removing) one or more of that User Level's default permissions.

NOTE: To add any permission not granted by default at a specified User Level, the User Level must be increased.