

# Gatekeeper

## The Navigation Window



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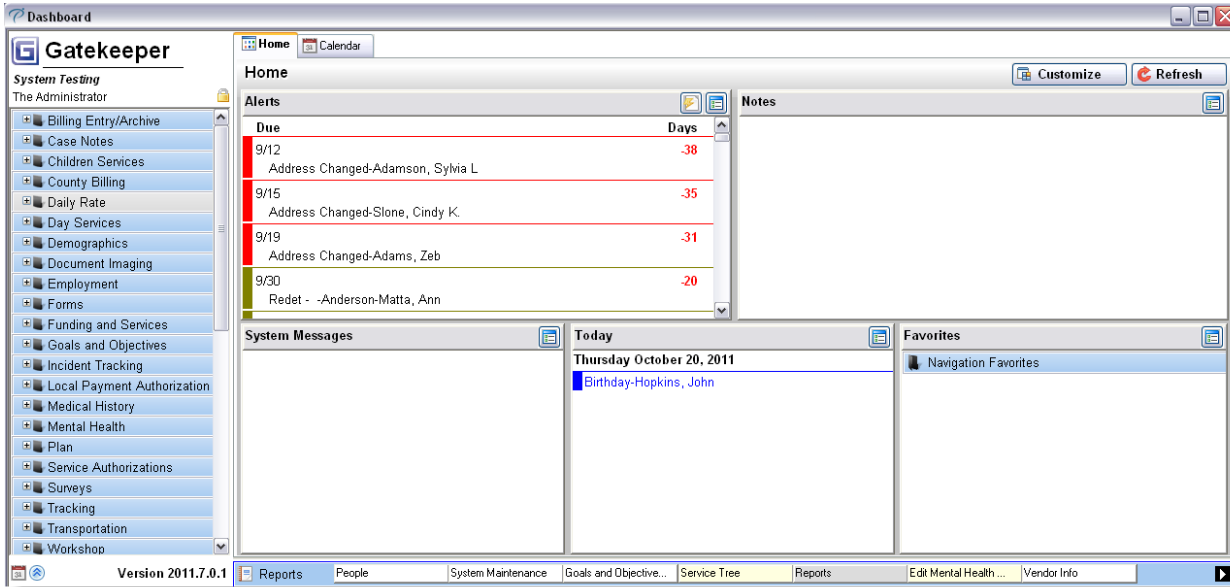
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# Finding Your Way Around Gatekeeper

When opening Gatekeeper, the Dashboard Window appears. This window provides each user with the ability to traverse through the program and to access any modules available.



The navigation bar on the left is a security driven window that will only show those features that the user has been given permission to access. A series of additional dashboards containing customizable 'widgets' can be found on the right. This screen will appear when you start Gatekeeper or whenever you close all of the program windows. Choose File and Close or clicking on the 'Home' toolbar button  will also bring up this screen from any window.

## The Dashboard


### General Navigation

The upper left corner of the Dashboard contains the following information:

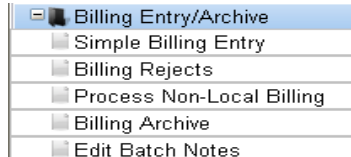


Clicking on the user name refreshes the user's system. This behaves just as if the program was closed and reopened and is most helpful when new security permissions are assigned to a user while their program is open.

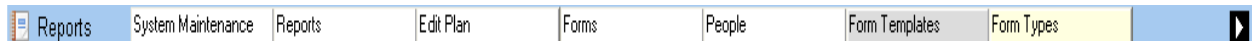
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Lock is a security feature that allows you to leave the application open (if the lock is on) and requires a user to log in again to gain access to the system. To activate the lock, double-click on ; log in to unlock.

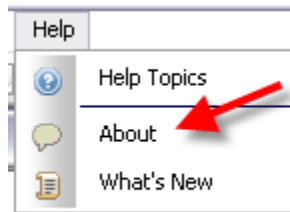
Clicking the + sign to the left of a folder or single clicking the folder name will open a folder and show additional folders and/or windows that may be available. Single clicking on the window name will also open a window. When the folder opens, each window for which the user has security will appear in a list:




In the lower portion of the Dashboard is a list of the most recent windows that have been opened on this computer, and a link to Reports. Users may return to a recently used window by clicking on the name of the window:



Clicking on the Help button at the top of the screen and choosing "About" will show information about the system, including the version, Primary Solutions' contact information, current licenses, license expiration and a link to the Primary Solutions web site.



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Gatekeeper users have access to two different calendars; one on the Dashboard for scheduling, and a calendar for reference purposes. In order to access the reference calendar, go to the  button on the bottom of the Navigation Tree. Once the button is pressed the reference calendar will appear. In order to close the calendar, press the button again.

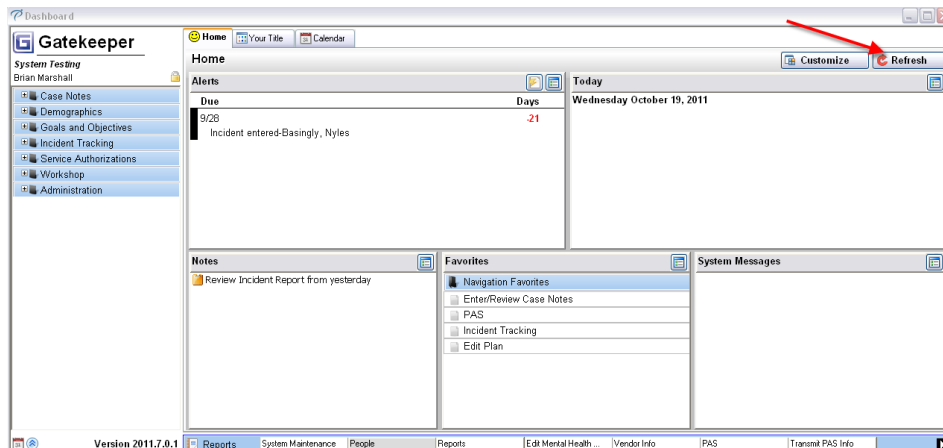
### Working with Dashboards

The newest version of Gatekeeper includes a Home Dashboard (tab) with 5 'Widgets' (sections): Alerts, Notes, Today, Favorites, and System Messages. Multiple Dashboards can be added to the Home Page as needed. The original Dashboard can be renamed, but cannot be deleted.

Users have control over the contents of their Dashboards, the order the Dashboards are displayed, and the names/general behavior of each Dashboard.

Each tab at the top is considered a Dashboard, and users have many customization options available. In the example below, there are two Dashboards: Home and Calendar. Tabs then have sub-sections, which we call 'Widgets'.

Dashboards can also be reordered by right-clicking on the Dashboard tab and selecting 'Move Left' or 'Move Right'. The Calendar is not a true Dashboard and will always remain in the far right position. To refresh your data for any Dashboard, click the 'Refresh' button in the upper right-hand corner of the Dashboard.

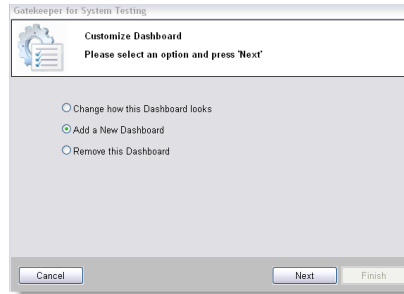


### Creating New Dashboards

- Click the 'Customize' button in the upper right hand corner of the Dashboard. Select 'Add a New Dashboard' then click 'Next':

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- Give your Dashboard a title. This is completely at the user's discretion.
- Click on the widgets you want to add to this Dashboard and click 'Add'. You can also double-click on an item to add it to the Dashboard.
- Indicate how many widgets you want on the top and how many you want on the bottom. A Dashboard must have a minimum of 2 widgets.
- Change Picture allows you to customize the appearance of your Dashboard's tab. Click the Change Picture button and select the icon you want on the tab.
- Many widgets are available based on your Gatekeeper security. If you try to subscribe to one that you do not have permission to add, the system will notify you of this. For security setting assistance, you should see your Gatekeeper system administrator.
- Click 'Finish' to add the Dashboard.

### Changing an Existing Dashboard

- Select the Dashboard you want to change, then click on the 'Customize' button.
- Select the 'Change how this Dashboard looks' option then click 'Next'.
- You can change the title, add and/or remove widgets, and change the picture. You can also dictate how many widgets you want on the top and bottom, and the general positioning. You must have at least 2 widgets per Dashboard.
- Click 'Finish' when you have finished updating your Dashboard.

### Removing an Existing Dashboard

- Select the Dashboard you want to delete, and then click on the 'Customize' button.
- Select the 'Remove this Dashboard' option then click 'Next'.
- Click 'Finish', and Gatekeeper will remove the dashboard. EXCEPTIONS: You must have at least 1 dashboard in addition to your Calendar tab, that includes a System Messages widget.

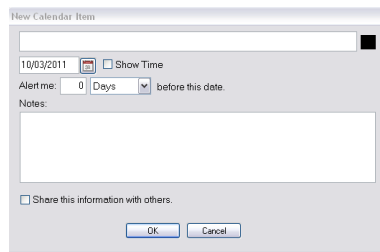
### The Calendar

Gatekeeper's calendar feature uses several different options:

- Calendar Dashboard: Calendar items can be entered as needed and shared with other Gatekeeper users as needed.
- Alerts: Subscribe to Alerts for notification of upcoming events, such as Redetermination Due Dates, Form Review, or Birthdays.
- Today: This 'widget' will display calendar information that needs to be addressed today.
- Upon opening the program, the calendar will show anything that is attached to the user's calendar for the current date.

Double-clicking on any particular event will pop up the details about that particular event. Items can be added to the calendar by double-clicking in the white space under the day of the week, (i.e. – 'Tuesday').

This will pop up the window to enter a new calendar item:



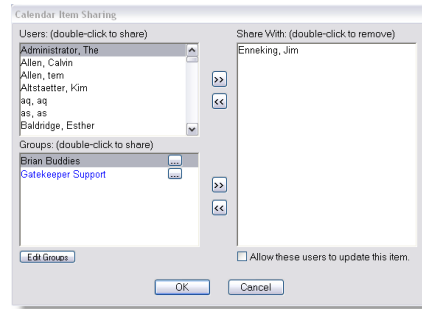
Enter the title of the event in the first data field. The color of the text may be selected from the available options. Enter the date the event occurs. If the event has a specific time attached to it, select the **"Show Time"** box and time fields will appear.

Alerts for this item can be set to either the number of days or the number of minutes before the event. Notes associated with the event can be placed in the **"Notes"** field.

If this is an event that needs to be shared with other people who are users in the system, click the **"Share this information with others"** box and click 'Who?'

On the left side of the screen are all of the Gatekeeper users in the agency's system. To share the calendar item with particular people, double-click on the name and it will move to the right side of the screen. To share with everyone in the system, click on the **>>** and everyone will move over. To remove everyone from the share list, click on the **<<**. Predefined groups appear at the bottom of the screen and can be moved to the **"Share With"** box in the same fashion. Individual users can identify their own frequently used groups of people by clicking on the **"Edit Groups"** button. The following window will appear:

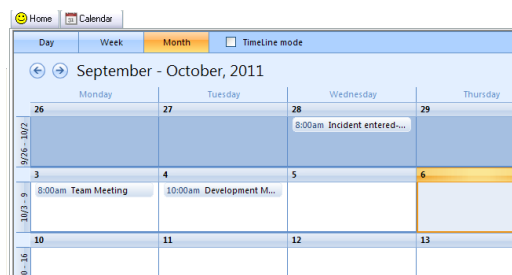
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To create a new group, click on the **"Create Group"** button. A blank data field will appear under the list of groups. Type the title of the new group in the data field. Individual users or all users are added to the new group using the same double-click method described previously. When the users have been added to the group, click **"OK"**. Creating groups of department members can save a user time in setting up notifications of common events in the future.

After the users, who are to share the particular calendar item, have been identified, the final step is to decide if the identified users may update the calendar item. If they may, check the **"Allow these users to update this item"** box. If they are not permitted to update the particular calendar item, leave this box unchecked.

After the calendar item has been added, and any additional users to notify have been identified, close the event window. The newly added item will appear on the calendar tab of the window of the user who added the event. It will also appear in the calendar of any user(s) that were identified to share the event:



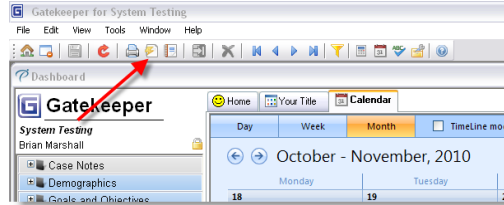
Events may also be added to the calendar by double-clicking in the calendar tab on the day of the event. This operation will pop up the same event insert window and follows an identical process. When the calendar button is selected, it will default view to the month and the current date will be highlighted. To move to a new month, click on the forward or backward arrows at the top of the calendar.

To print your calendar, click the Quick Print toolbar button.



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Please note that the calendar does not interface with Outlook.

### Working with Widgets

There are several widgets that each user gets by default:



- **Alerts:** While all users have the Alerts widget, subscription options are based on your security access. You may have Alert widgets on multiple dashboards and may remove the Alerts widget if you are not interested in this feature.
- **Notes:** All users have access to the Notes widget. You may have Notes widgets on multiple dashboards and may remove the Notes widget if you are not interested in this feature.
- **Favorites:** All users have access to the Favorites widget. You may have Favorites widgets on multiple dashboards and may remove the widget if you are not interested in this feature.
- **System Messages:** All users have access to the System Messages widget. You may have System Messages widgets on multiple dashboards; however, you must have at least one occurrence of this widget on at a dashboard as this feature is often used by Gatekeeper administrators to communicate important information to users.
- **Today:** All users have access to the Today widget. You may have Today widgets on multiple dashboards and may remove the widget if you are not interested in this feature.

Other widgets are available and are based on a user's security permissions. The following are examples of security requirements for widget subscriptions:

- **Case Notes Productivity:** Users must have Enter/Review Case Note permission to view Case Note Productivity
- **Demographics – Birthday Distribution:** Users must have People View permission to view Consumer Birthdays
- **Service Authorization – PAS Redeterminations:** Users must have Service Authorization View permission to list PAS Redeterminations.

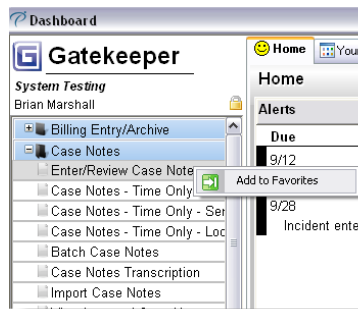
Widgets can be customized by using the Dashboard's customize features. While features available on each widget will vary, as described above, the module-related widgets typically have additional features, such as:

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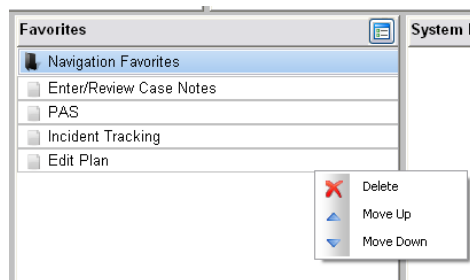
-  - Quick Print Reports: Most widgets have either a Quick Print button on the widget itself, or have a report available from the widget's data.
- Widgets without the Quick Print Button: For most widgets that do not have a Quick Print button, click directly on the data and a Quick Print report will display. For example, using the PAS Redetermination widget, if the user clicks on a specific individual, the PAS for that individual will be displayed.
-  - Widget Description: Widget descriptions can be set with a default for the look ahead period. For example, subscribing to the **PAS Redetermination** can permit a look ahead period of 60 days for upcoming redeterminations due. This is defined by the subscriber.

### Favorites Widget

All users have a 'Favorites widget' on the right hand side of the Dashboard to allow you to create a list of commonly used windows for easy navigation. In addition, you can have a Favorites widget on each dashboard if desired. To add a window to your default – or any - Favorites widget, right click on the window and choose Add to Favorites. See **Working with Dashboards and Working with Widgets** for more information:



Once you have added windows to your Favorites widget, you can then re-order or remove them by right- clicking on the window in favorites:

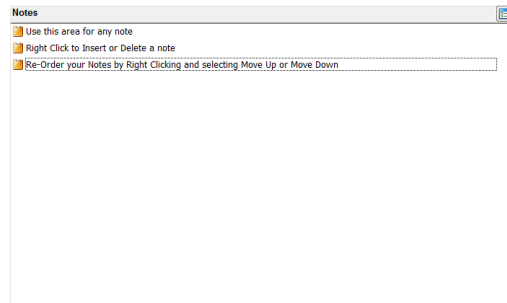


### Notes Widget

Notes widgets can be added to as many dashboards as you would like. They are simply available for individual users to make simple reminders, rather like "Post-it" notes.

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- To edit an existing note, double-click on the note to open it.
- Re-order your notes by right-clicking and selecting 'Move Up' or 'Move Down'

See **Working with Dashboards and Working with Widgets** for more information.

### System Messages Widget

On the bottom of the navigation screen, a **"System Messages"** section appears:



Only system users who have access to the **"Connection Management"** window of the program will have access to add, edit, or delete information in the **"System Messages"** box. This area is intended to share information system-wide as needed.

- To enter a new message, right click once in the white space somewhere in the 'System Messages' section and select 'Insert'
- To delete a message, right click on the note and select 'Delete'

See **Working with Dashboards and Working with Widgets** for more information.

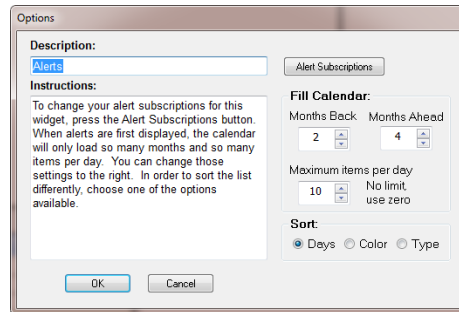
### Alerts Widget

Alerts can be subscribed from any Alerts Widget. Alert Widgets can be added to multiple dashboards as needed. For example, if I have an Incident Tracking dashboard that contains information related to recent incidents, I would perhaps want to add the Alerts Widget to this dashboard. From that Widget, I would then subscribe to specific alerts, such as the Incident Tracking – Case Note Entered alert.

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### To subscribe to an alert:

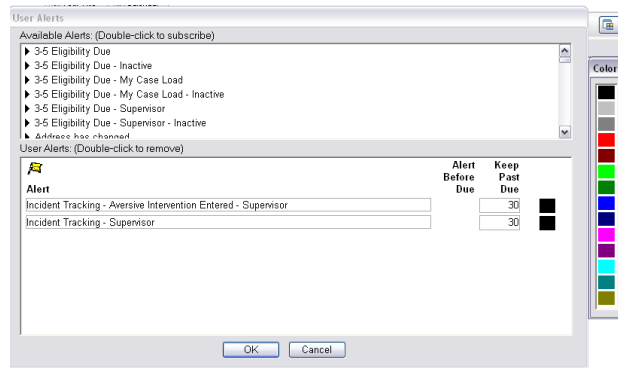
From the Dashboard, Alerts Widget, click on :



For this particular Alert Widget, you can make a default setting as it applies to the subscriptions contained on this widget for how to fill the calendar and the maximum items per day.

**NOTE:** Use caution when setting maximum numbers as you can inadvertently have items unreported because of this setting. We recommend that you limit the number of items per day when you are setting up a new feature until all existing data is in the system. Once your existing data is in, you should set this to a higher number so that no items are excluded. You can set the sort as well, by days, color, or type of alert item.


After setting these general parameters, click . Individual users can subscribe to a selection of available alerts and select how far in advance they wish to be notified of the event. The following subscription box will appear:




The top box lists all available alerts. To subscribe to an alert, double-click on the item. Depending on the number of potential subcategories contained in a category, there may be additional options to identify even more specific alerts to subscribe. After an alert is selected, enter the number of days in advance to notify you and how long you'd like to keep the alert past its due date. You can also apply a color to each alert you subscribe to: click on the color to the right of each alert and select your preferred text color for the alert.

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Once all desired alerts have been selected, click OK and return to the main screen. Individual users may set personal preferences for their **"Alert"** function. To do so, click on the Alert Options button .

To display a report of your alert items as shown in your Alerts Widget, click .

### **To delete an alert:**

From the Dashboard Alerts Widget, click on . Click on the Subscriptions button, and double click on the User Alert you want to remove.

See **Working with Dashboards and Working with Widgets** for more information.