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# **RWGA rDirectory v3.1**

## **Guide for Agency Contacts**

An informational guide for Agency CPCDMS Contact personnel to assist with the use of rDirectory as a tool for their CPCDMS user logon issues, i.e., password resets, unlock accounts, disable user accounts, and to view user access rights.

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# rDirectory

## What is rDirectory?

rDirectory is a separate web-based application that is available even when CPCDMS is not. It is used by Agency CPCDMS Contact personnel to assist their CPCDMS users with logon issues, reset passwords, unlock accounts, disable user accounts, and to view user access rights. Instead of submitting a HelpDesk ticket for CPCDMS access issues, users now communicate directly with their CPCDMS contact person(s) to resolve logon issues.

rDirectory can be found in CPCDMS under the tab on the left menu labeled "Personnel". Only agency contact personnel can see this tab.

When you click on this tab, it will take you to the rDirectory logon page as shown below. Enter your CPCDMS username and password then click on "Logon" to gain access.



After logging on, the first page that you will be presented with will display all of your agencies' CPCDMS users, whose accounts are not Disabled or Locked-Out.

The screenshot shows the 'LCHS Enabled Personnel' page. At the top, there are tabs for 'LCHS Enabled Personnel', 'LCHS Disabled Personnel', 'LCHS Locked-Out Personnel', and 'All LCHS Groups'. The 'LCHS Enabled Personnel' tab is selected. Below the tabs is a search bar with 'Find: Name' and 'Begins With' dropdowns, and a search button. The main content is a table titled 'LCHS Enabled Personnel Where Name="\*"'. The table has columns for Name, Last-Logon, CPCDMS UserID, Password Expires, Password Last Set, and Data Entry Role. The user 'Boland, Jeanne' is highlighted in blue. Below the table is a 'Matching Items 1 - 30' indicator. Below the table is a detailed view for 'CPCDMS User Ichstest'. The 'General' tab is selected, showing fields for Title, Data Entry Role (LCHS Data Entry Reg), Office, Phone, Manager, Home Page, and Address. A 'Photo' field shows a silhouette with the text 'Photo Not Available'.

Name	Last-Logon	CPCDMS UserID	Password Expires	Password Last Set	Data Entry Role
Account, Test	4/5/2011 2:59:41 PM	Ichstest	4/30/2011 1:47:40 PM	2/19/2011 1:47:40 PM	LCHS Data Entry Reg
Ali, Najma	1/31/2011 5:02:15 PM	nali	4/15/2011 5:01:34 PM	1/31/2011 5:01:34 PM	LCHS Data Entry
Blackmon, DeAndrea	4/5/2011 1:12:55 PM	dblackmon	5/17/2011 9:29:32 AM	3/4/2011 9:29:32 AM	LCHS Data Entry Reg
<b>Boland, Jeanne</b>	<b>11/30/2010 1:04:52 PM</b>	<b>jboland</b>	<b>1/8/2011 3:49:56 PM</b>	<b>10/26/2010 3:49:56 PM</b>	<b>LCHS Data Entry Reg</b>
Brancheau, Amanda	4/1/2011 11:18:24 AM	abrancheau	4/26/2011 5:05:35 PM	2/11/2011 5:05:35 PM	LCHS Data Entry Reg
Contreras, Synthia	3/30/2011 3:49:24 PM	scontreras	6/3/2011 3:38:43 PM	3/21/2011 3:38:43 PM	LCHS Data Entry
Crosson, Ali	1/31/2011 5:23:40 PM	acrosson	3/27/2011 1:20:24 PM	1/12/2011 1:20:24 PM	LCHS Data Entry Reg
Crowder, Christina	3/25/2011 2:37:15 PM	ccrowder	4/22/2011 5:30:30 PM	2/7/2011 5:30:30 PM	LCHS Data Entry
Dabney, Karen	4/5/2011 1:32:09 PM	kdabney	4/22/2011 1:43:51 PM	2/7/2011 1:43:51 PM	LCHS Data Entry
Derouen, Vicki	3/18/2011 4:29:12 PM	vderouen	5/30/2011 2:19:38 PM	3/17/2011 2:19:38 PM	LCHS Data Entry Reg
Ellis, Connie	4/5/2011 3:02:27 PM	cellis	6/18/2011 3:02:14 PM	4/5/2011 3:02:14 PM	LCHS Data Entry
Enaohwo, Keicia	4/1/2011 2:53:39 PM	kenaohwo	4/30/2011 11:38:03 AM	2/15/2011 11:38:03 AM	LCHS Data Entry Reg
Endresen, Jaime	4/5/2011 2:13:11 PM	jendresen	4/22/2011 1:12:10 PM	2/7/2011 1:12:10 PM	LCHS Data Entry Reg

You can click on the tabs across the top to see the status of other agency personnel, such as:

### Disabled Personnel

The screenshot shows the 'LCHS Disabled Personnel' page. At the top, there are tabs for 'LCHS Enabled Personnel', 'LCHS Disabled Personnel', 'LCHS Locked-Out Personnel', and 'All LCHS Groups'. The 'LCHS Disabled Personnel' tab is selected. Below the tabs is a search bar with 'Find: Name' and 'Begins With' dropdowns, and a search button. The main content is a table titled 'LCHS Disabled Personnel Where Name="\*"'. The table has columns for Name, Last-Logon, Bad-Password-Time, CPCDMS UserID, and Data Entry Role. The user 'DeLaet, Tanya' is listed. Below the table is a '4 Items Found' indicator. Below the table is a detailed view for 'Disabled CPCDMS User Tanya DeLaet'. The 'General' tab is selected, showing fields for Title (GrandAids Supervisor/Performance Improvement Coordinator), Data Entry Role (LCHS Data Entry), Office (GrandAids Supervisor/Performance Improvement Coordinator), Phone ((713) 830-3000), Manager, Home Page (http://www.leqaccommunityhealth.org), and Address. A 'Photo' field shows a silhouette with the text 'Photo Not Available'.

Name	Last-Logon	Bad-Password-Time	CPCDMS UserID	Data Entry Role
DeLaet, Tanya			tdelaet	LCHS Data Entry
Koslin, Louise			lkoslin	LCHS Data Entry
Martin, Carin			CMLchs	RWGA Account for CSAT Surveys
Toffar, Sandra			stoffar	LCHS Data Entry

The Disabled Personnel tab shows all personnel at your agency whose CPCDMS user account is currently disabled.

## Locked-Out Personnel

**LCHS Locked-Out Personnel**

Find: Name | Begins With | Search | Advanced

Name	Last-Logon	Bad-Password-Time	Bad Password Co...	Lockout-Time	CPCDMS UserID	Data Entry Role
Jenks, Rebecca	1/27/2011 10:25:52 AM	3/17/2011 9:25:26 AM	6	3/17/2011 9:25:26 AM	rjenks	LCHS Data Entry
Moreno, Mayra	9/17/2010 3:02:36 PM	12/20/2010 11:01:20 AM	8	12/20/2010 11:01:20 AM	mmoreno	LCHS Data Entry
Walker, Barbara	12/14/2010 5:36:45 PM	2/10/2011 2:55:26 PM	6	2/10/2011 2:55:26 PM	bwalker	LCHS Data Entry Reg

3 Items Found

**Locked-Out CPCDMS User Rebecca Jenks**

General | Member Of

Title: Billing Specialist  
 Data Entry: LCHS Data Entry  
 Role:  
 Office: Billing Specialist  
 Phone: (713) 830-3000  
 Manager:  
 Home Page: <http://www.leacycommunityhealth.org>  
 Address: 215 Westheimer  
 Houston

Photo: Photo Not Available

The Locked-Out Personnel tab shows all personnel at your agency whose CPCDMS user account is currently locked out.

## All Groups

**All LCHS Groups**

Find: Name | Begins With | Search | Advanced

Name	Description
LCHS_Agy_CaseManager_Transfer	LCHS personnel that can Transfer Clients From One Case Manager to Another
LCHS_Agy_Client_Transfer	LCHS personnel that can Transfer Clients From Other Agencies if Eligibility is >180 days expired
LCHS_Agy_DataEntry_Reg	LCHS personnel that can do Data Entry plus Registrations & Updates
LCHS_Agy_Import	LCHS personnel that can import data into CPCDMS
LCHS_Agy_SurveyAssessment	LCHS personnel that can Generate Surveys
LCHS_Agy_SurveyAssessment_Delete	LCHS personnel that can Delete Surveys
LCHS_DataEntry	LCHS personnel that can do Verifications, enter and search Bus Vouchers & Encounter Data
LCHS_Edit&Delete	LCHS personnel that can Edit & Delete Encounters
LCHS_PW_Admins	LCHS personnel that can reset User Passwords in iDirectory (LCHS Contacts)
LCHS_Report_Runners	LCHS personnel that can schedule and run reports

10 Items Found

**LCHS Groups LCHS\_Agy\_CaseManager\_Transfer**

Members

Ali Crosson, Catherine Yaple, Christina Hidalgo, Jaime Endreson, Jeanne Boland, Jennifer Garcia, Valerie L. Garcia

The All Groups tab shows your agencies' different CPCDMS Special Rights Groups and who is a member of them. Double-Click on a group to see the membership.

## To manage a Users Account

Double-Click on the user that you wish to manage from the Enabled Personnel, Disabled Personnel or the Locked-Out Personnel tabs. Next click on Manage, located on the bottom panel, right-hand side. You will be presented with a page as shown below. You can see that the account is locked by the word **“True”** in red.

The screenshot shows the 'LCHS Locked-Out Personnel' management interface. A modal window titled 'Manage: Mayra Moreno' is open, displaying account information. The 'Account Locked' status is 'True' in red. Below the modal, the user's profile details are visible, including title, role, office, phone, manager, home page, and address.

Name	Last-Login	Bad-Password-Time	Bad Password Co...	Logout-Time	CPCDMS UserID	Data Entry Role
Jenks, Rebecca	1/27/2011 10:23:52 AM	3/17/2011 9:25:26 AM	8	3/17/2011 9:23:26 AM	rjenks	LCHS Data Entry
Moreno, Mayra	8/17/2010 3:02:36 PM	12/20/2010 11:01:20 AM	8	12/20/2010 11:01:20 AM	mmoreno	LCHS Data Entry
Walker, Barbara	12/14/2010 5:38:45 PM	2/10/2011 2:55:26 PM	6	2/10/2011 2:55:26 PM	bwalker	LCHS Data Entry Reg

Account Information:  
Account Name : RWGA/mmoreno  
Account Disabled : False  
Account Locked : True

No Profile defined  
Skip Validation

Locked-Out CPCDMS User Mayra Moreno

General Member Of

Title: File Clerk  
Data Entry: LCHS Data Entry  
Role:  
Office: File Clerk  
Phone: (712) 533-0602  
Manager:  
Home Page: <http://www.legacyscommunityhealth.org>  
Address: 215 Westheimer  
Munich, GA

If the user has already setup their profile, you will see a page like the one shown below.

The screenshot shows the 'LCHS Enabled Personnel' management interface. A modal window titled 'Manage: Ichstest' is open, displaying account information. The 'Account Locked' status is 'False'. Below the modal, the user's profile details are visible, including a question 'What is your favorite color?' and a 'Skip Validation' button.

Name	Last-Login	CPCDMS UserID	Password Expires	Password Last Set	Data Entry Role
Account, Test	4/5/2011 5:46:47 PM	Ichstest	4/30/2011 1:47:40 PM	2/15/2011 1:47:40 PM	LCHS Data Entry Reg
Ali, Najma	1/31/2011 5:02:15 PM	naali	4/15/2011 5:01:34 PM	1/31/2011 5:01:34 PM	LCHS Data Entry
Bladmon, DeAndrea	4/6/2011 9:48:07 AM	dbladmon	3/17/2011 9:29:32 AM	3/4/2011 9:29:32 AM	LCHS Data Entry Reg
Goland, Jeanne	11/20/2010				Data Entry Reg
Brancheau, Amanda	4/1/2011 11:11				Data Entry Reg
Contreras, Synthia	3/20/2011 3:29				Data Entry
Crossen, Ali	1/31/2011 5:12				Data Entry Reg
Crowder, Christina	4/5/2011 4:11				Data Entry
Dabney, Karen	4/6/2011 9:44				Data Entry
Derouen, Vido	3/18/2011 4:2				Data Entry Reg
Ellis, Connie	4/5/2011 5:23				Data Entry
Enashwo, Keda	4/5/2011 4:05				Data Entry Reg
Endresen, Jaime	4/5/2011 5:02				Data Entry Reg

Account Information:  
Account Name : RWGA/Ichstest  
Account Disabled : False  
Account Locked : False

Question 1  
What is your favorite color?  
\_\_\_\_\_  
Continue Cancel

Skip Validation

CPCDMS User Ichstest

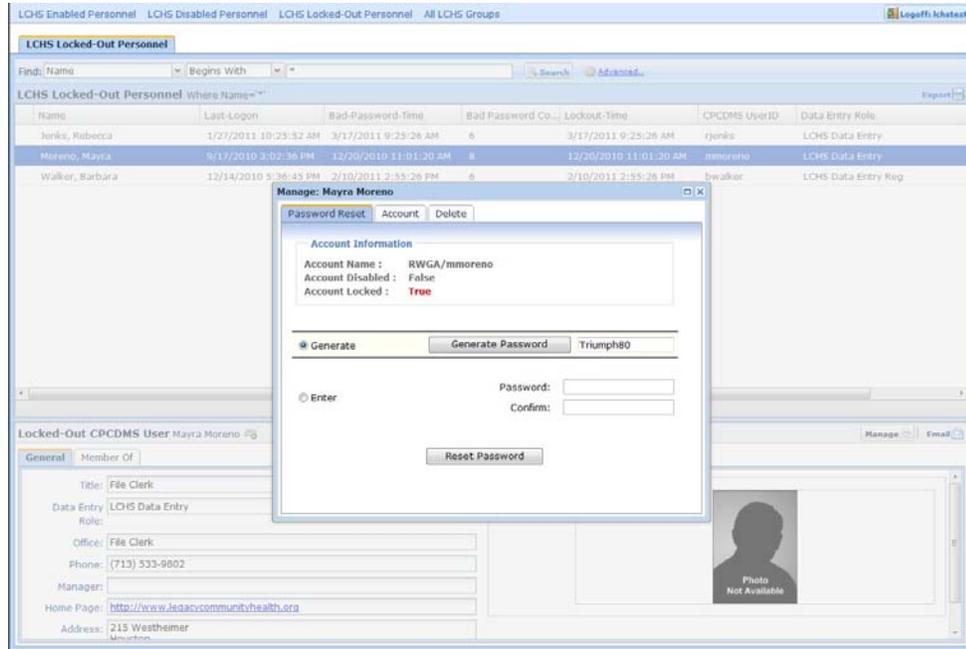
General Member Of

Title:  
Data Entry: LCHS Data Entry Reg  
Role:  
Office:  
Phone:  
Manager:  
Home Page:  
Address:

You can choose to validate the user by asking them their profile questions and typing in the answers or you can click on Skip Validation.

## To reset the users password

After you have validated the user by asking their profile questions or skipping validation you are presented with the following page.



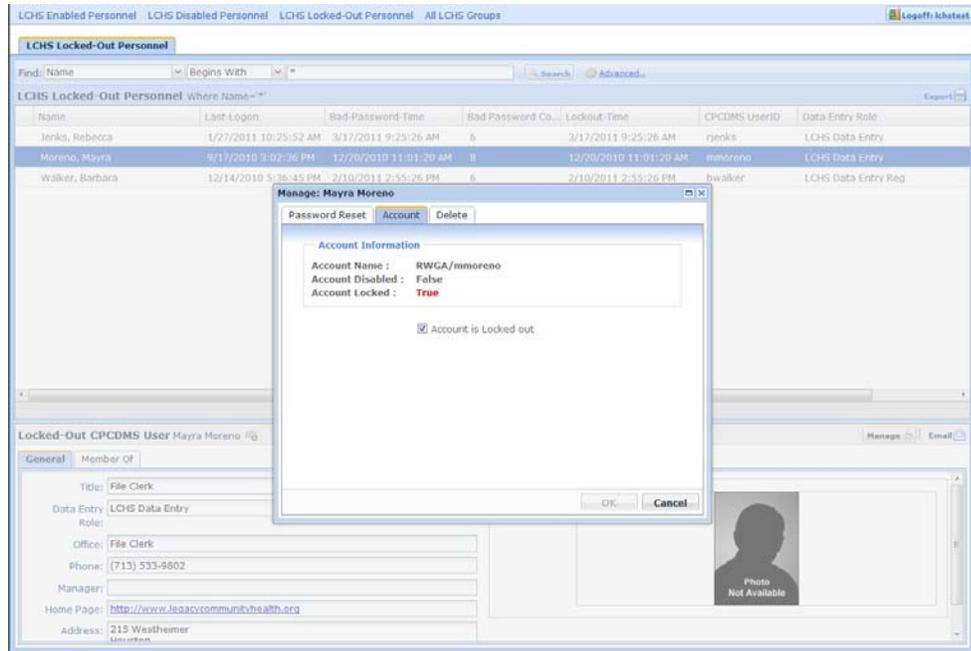
The password generator can be used (default selection), or you can create your own new password.

**Generate** – To use the password generator, click on “Generate Password”, make note of the password that is generated, ensure it conforms to the security rules, and then press “Change Password”.

**Enter** - To enter a user-created password, click on “Enter”, type the new password into the “Password” and “Confirm” boxes, make note of the password entered, ensure that it conforms to the security rules, and then click “Change Password”.

Once the password has been changed the user will receive an email notifying them that it has been changed and by whom. It will not tell them what the new password is. You must notify them of what you have changed the password to and they will have to change it the next time that they logon.

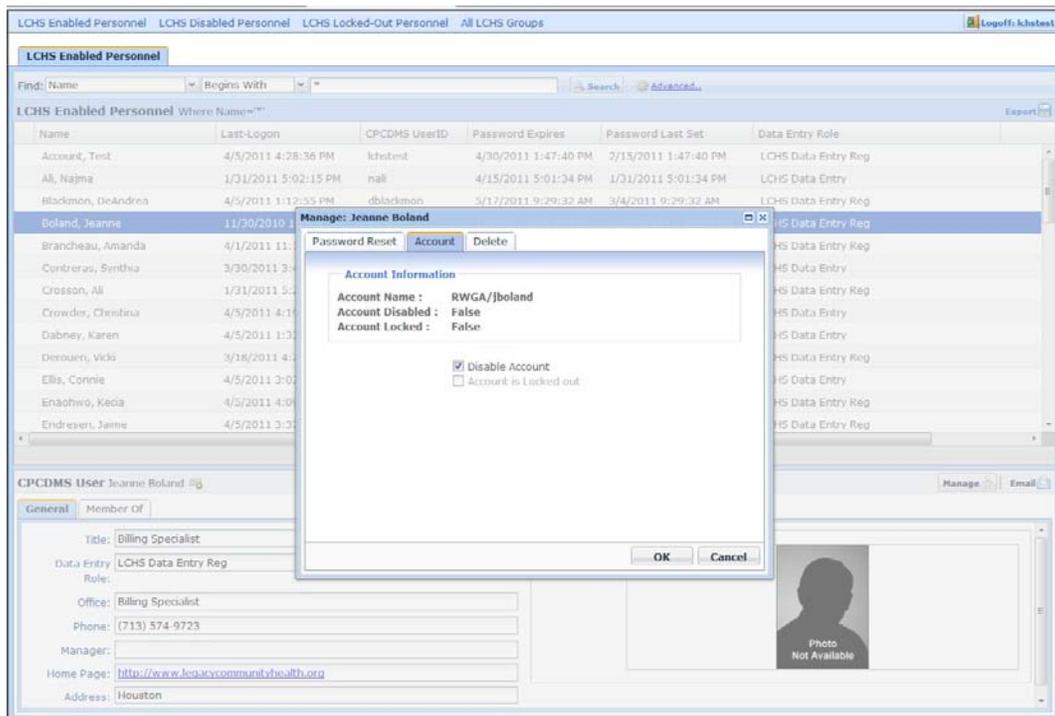
## To unlock the account



Click on the Account tab and you are presented with the following page. Uncheck the box where it says “Account is Locked out” and then click on “OK”.

## To disable the account

Double-Click on the user that you wish to manage from the Enabled Personnel tab. Next click on Manage, located on the bottom panel, right-hand side. You will be presented with a page as shown below.



Check the box where it says “Disable Account” and then click on “OK”.