



**cFive Catalyst
Quick Start Guide
For System Administrators**

**Setting Up Users | Deactivating Users
Unlocking Users**



**Data-driven
Outcomes**

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INTRODUCTION

This Quick Start Guide provides instructions for the Catalyst System Administrator (Admin) to set up internal Users. It also contains information on deactivating and unlocking Users.

“Users” are the members of your staff who will be using the Catalyst’s “Officer Portal”. Your list of users will include officers and case managers who will be supervising clients, along with others who will want to access the system including supervisors and staff who may be designated to enroll clients.

Additional Learning Resources

cFive provides a library of learning resources at our website at:

<https://www.cfive.com/covid-19-support-program-resources>

The Online Resource page contains a variety of informational resources including Quick Start Guides, Videos and informational documents. There are a series of Videos that partner with the Quick Start Guides to provide additional information and visual reference for the topics.

Minimum Phone Operating Systems Supported

In order to maintain stringent security protocols, cFive can only support Catalyst installed on these Operating Systems:

ANDROID: Version 6, Marshmallow from October 5, 2015 and above

iOS: iPhone 6s or above with the latest iOS operating system 10



GETTING STARTED

The first step in configuring your Catalyst system is entering your list of Users.

DEFINITION: “Users” are the members of your team who will be using Catalyst. Those include officers and case managers who supervise clients, any staff who is assigned to Enroll Clients, and staff members who will need to access the system to supervise case managers, review client list and related data, etc.

Create User List

To get started you will need to create your User list. When entering multiple Users at one time, we recommend that you create a list of Users that you can work from.

As you set up the User, you will find seven fields that can be completed.

Catalyst only requires you complete these fields: Username, Password, First Name, and Last Name. You and your agency should determine if the phone number and email address should be entered into the system when new Users are added.

User Information Fields (asterisk indicates required field):

- Username*
- Password*
- Last Name*
- First Name*
- Middle Name
- Phone Number
- Email Address

Edits and More Users: The information related to each User can be updated by the Admin whenever needed. Additional Users can be added at any time.

Sample List Format

Below is a sample of a table format that can be used to create and track your User list.

User ID	Name	Phone (10 digits required)	Check if Admin
mhancock@youragency.com	Michael Hancock	555-555-5501	✓
jnewberg@youragency.com	June Newberg	555-555-5502	
rchavez@youragency.com	Rita Chavez	555-555-5503	
lskywalker@youragency.com	Luke Skywalker	555-555-5503	



Defining the User Name and Password

User Name: We suggest that you use the person's email address as their "User Name" because it is easiest for people to remember and to be able to quickly input when they login to Catalyst.

Password: Your system password will be set up by cFive, so you will not need to change the pre-filled data (displayed on the screen in this format: "*****").

Best Practice: Your password can be changed at your discretion, but to help you avoid spending a great deal of time serving as the password manager for your Users we recommend you maintain the same password that was provided.

Other Fields - Check Boxes

You will note your User set up screen also contains two boxes that you can check ("Enabled" and "Administrator").

- **Enabled:** When this box is checked it indicated the User can access the system. **You will want to make sure this box is checked when you add a new User.**
- **Administrator:** This designates the User as a System Administrator. That means this person will have access to specific areas within the system that the User does not (such as system settings, etc). We do not recommend you set up multiple Administrators.



SETTING UP USERS IN CATALYST

Now that you have your list of people you want to set up as Users you are ready to get started entering them into Catalyst.

Logging in - URL

1. **First you will login to Catalyst.** Your cFive Catalyst Officer Portal can be accessed at the following url: <https://catalyst2.cfive.com/>

1. The cFive Catalyst login page will display.

NOTE: In a separate document, cFive will provide you your User name and password.

Locate “Users” Screen

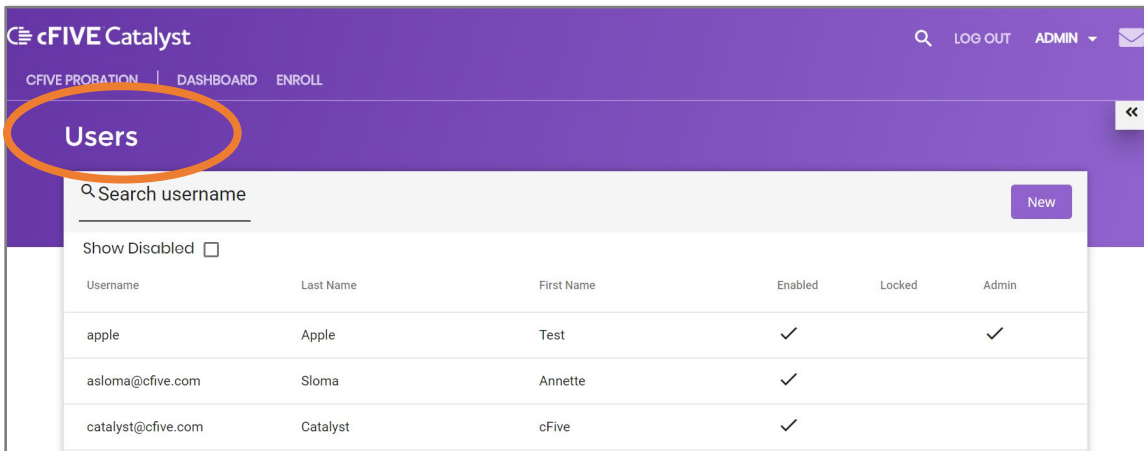
2. From the top of your Officer Portal Dashboard, **click on the word “ADMIN” to access the drop-down menu:**

Username	Last Name	First Name	Enabled	Locked
apple	Apple	Test	✓	
asloma@cfive.com	Sloma	Annette	✓	

3. **Select “Users”** from the drop-down menu.

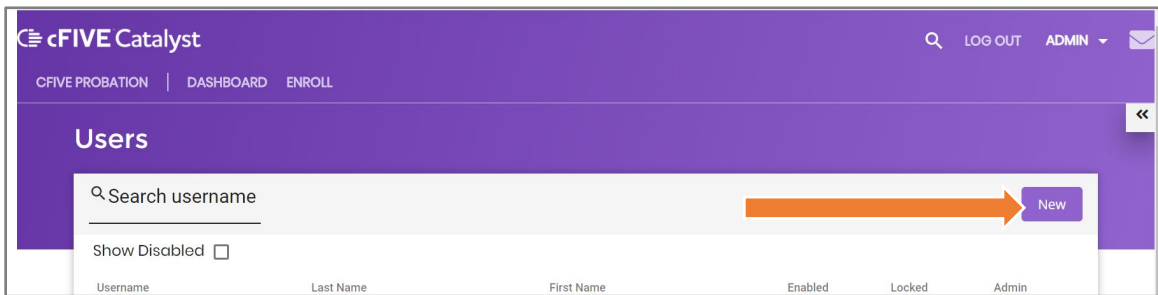


You will be taken to the “Users” screen (sample below).



Navigate to New User Screen & Input Information

4. **Click on the purple “New” button** on the right-hand side of the screen.





5. You will be directed to a **“User Information” screen**. This is where you will input the User information in the content boxes. Remember, Catalyst requires you to complete the fields for Username, Password, Last Name and First Name.

The screenshot shows the 'Users' management interface in the cFIVE Catalyst system. The page title is 'Users'. The form is titled 'User Information' and contains the following fields and controls:

- Username:** tuckerm@youragency.com
- Password:** [Redacted]
- Last Name:** Mathew
- First Name:** Tucker
- Middle Name:** [Empty]
- Phone Number:** (222) 555-3434
- Email:** tuckerm@youragency.com
- Enabled:** Enabled
- Administrator:** Administrator

At the bottom left of the form, there are two buttons: a blue 'Save' button and a white 'Cancel' button. An orange arrow points to the 'Save' button.

6. When you entered the User Information, **click on the blue “Save” button** on the lower left-hand side of the screen. Your User has been entered! You should now see their name on the Users List.



REMOVING OR DEACTIVATING USERS

To remove or deactivate a User from Catalyst, follow these steps:

1. Go to the **User Information Screen** for the specific User you want to change
2. **Uncheck the “Enabled” box** on their screen
3. **Click on the blue “Save” button**

Your User will be removed from your User List.

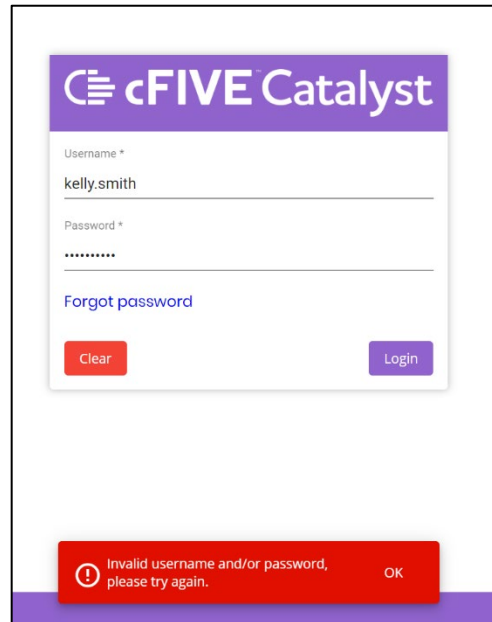
The screenshot shows the 'Users' management interface in cFIVE Catalyst. A modal window titled 'User Information' is open, displaying a form for editing user details. The form includes fields for Username, Password, Last Name, First Name, Middle Name, Phone Number, and Email. The 'Enabled' checkbox is currently checked and is circled in orange. The 'Administrator' checkbox is also present. At the bottom of the form are 'Save' and 'Cancel' buttons. The background shows the main navigation menu with 'CFIVE PROBATION', 'DASHBOARD', and 'ENROLL' options.



UNLOCKING A USER

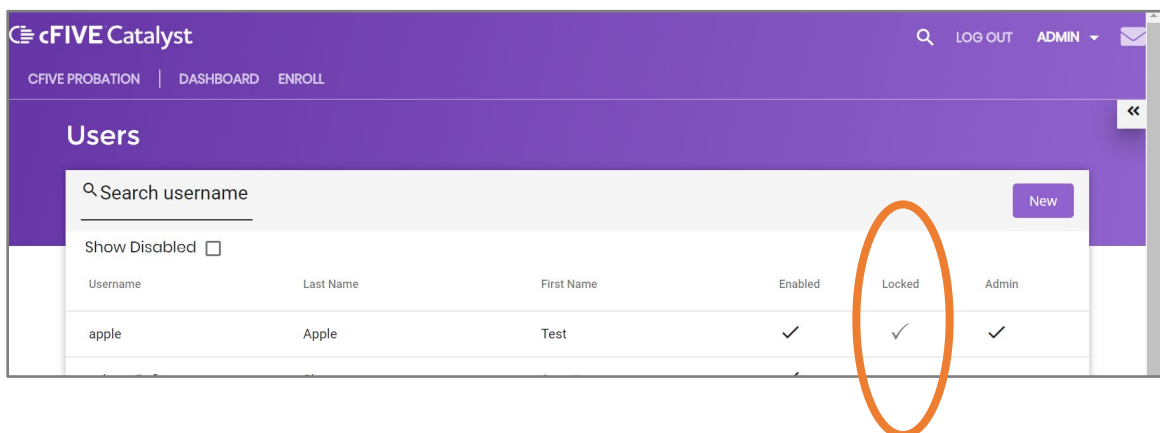
If a User enters the wrong user name and/or password they will be given an error message on their login screen:

When this occurs too many times, they will be locked out of the Catalyst system and the Admin will be required to unlock them.



Your User will most likely contact you when they have been locked out of the system. You will be able to confirm their system has been locked by looking at the “**Users**” Screen.

If they are locked out of the system you will see a **check in the “Locked”** column on the line containing the User’s name:





Take these steps to Unlock a User:

1. **Click on the Username** from the “User” screen. You will be redirected to the Client’s User Information page.
2. You will see that a box has been checked that says “Locked”. **Uncheck the box, and click the blue “Save” button.**

The User will be unlocked and able to access the system again.