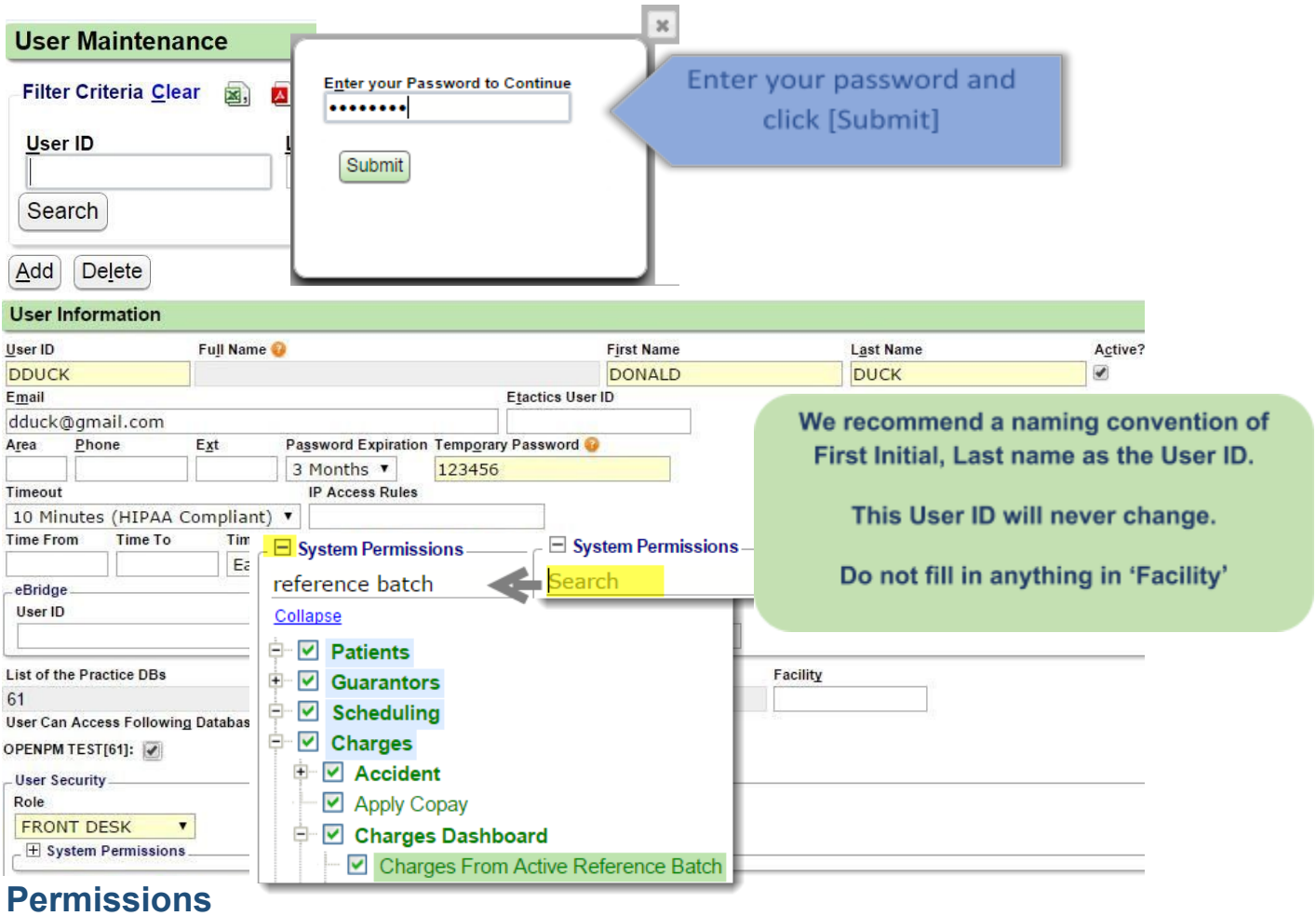
CATEGORY: SECURITY ~ Add New User, Permission & Roles

Add a New User

Click ‘Admin’ > [User Maintenance] > [Add] > Choose a permission 'Role' for the user and [Save]



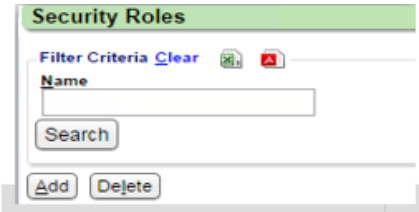
Permissions

‘System Permissions’ are organized in a ‘tree’ for the Administrator to allow or block users from screens and functions. In our example, we typed 'reference batch’ which opened the tree for our review.

Click the plus (+) sign by 'System Permissions' to use ‘Search’ to find specific permissions by searching for the screen name. TIP: Use the name of the page found in the header at the top of each screen and use that in the ‘Search’ field.

Roles

Security Roles allow the Administrator to assign ‘Roles’ to each user. There are six predefined roles. These roles can be modified to affect all users with a role or new ones can be added to meet the unique needs of your practice.



	Permissions	Description
ADMINISTRATOR	View	Complete Access
BILLER	View	Charges, Payments, and Limited Libraries
FRONT DESK	View	Scheduling, Registration, & Receipts
PROVIDER	View	Look-up Access, Schedule, and Reporting
SCHEDULER	View	Scheduling & Registration
VIEW ONLY	View	Limited Look-up Access

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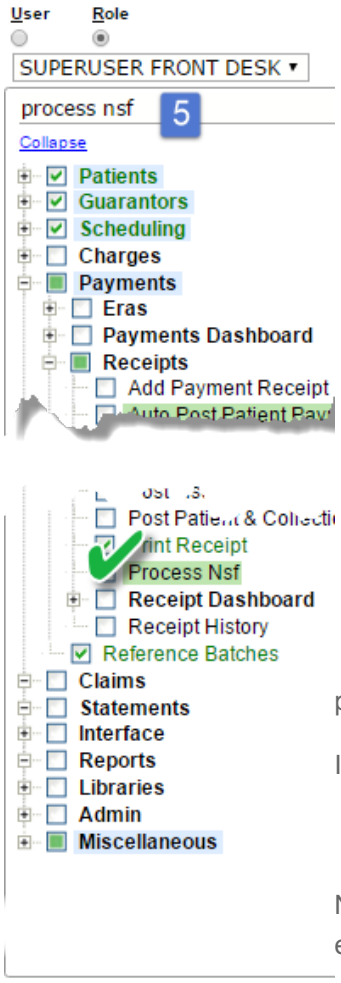
How to add a new 'Role' and edit 'Permissions'

Go to Admin > Role >

1. Click [ADD]
2. Create a name and copy an existing Role you want to modify (add or subtract permissions)
3. [Save]
4. Click View to Edit Permission OR to go the Permission button in Admin



5. Use the 'Search' field, type a feature to open the security tree > check to give a permission, uncheck to take away a permission

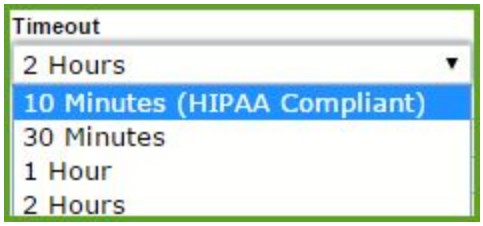
In our screenshot we gave the front desk 'super user' the ability to post NSF

6. [SAVE]

Now this role can be assigned to any User. This makes the task of adding new employees with special security rights very easy.

I am getting logged out too often, what should I do?

The system admin user is able to Change the 'Timeout' from the system delivered 10 minutes to more time.



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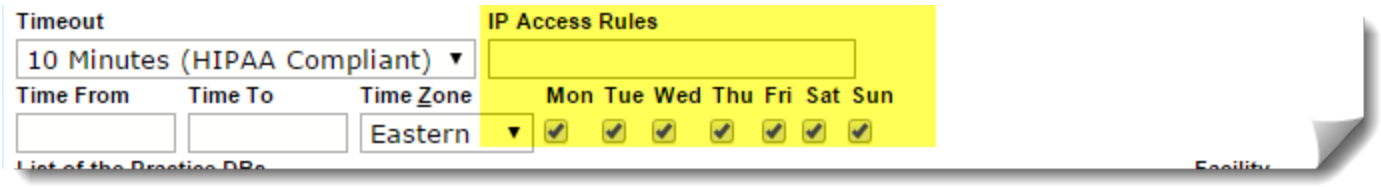
How can I limit a user's access?

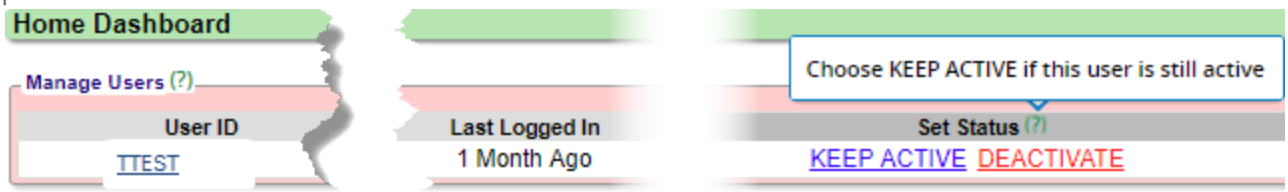
If an IP address is entered, the user will only be able to access from that IP address. You can control the days of the week, and times a user is allowed to log in.



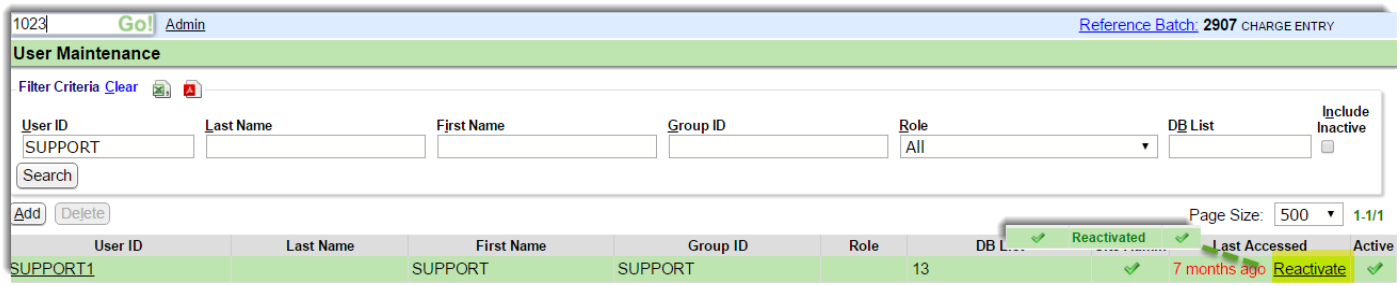
How do I 'Reactivate' a User?

A user who has not logged in for 30 days will not be able to log in until their User has been Reactivated. This is a security measure.

The Site Administrator will be alerted on the 'Home Dashboard' in the 'Manage User' section, which appears when a user(s) has not logged into the system in a month or more. Simply click 'Keep Active' if you wish this person to continue to have access.



You may also, Go to 'Admin' > [User Maintenance] > Click 'Reactivate' in the 'Last Accessed' column with the user name



How do I make a user Inactive?

Click 'Admin' > [User Maintenance] > User ID > type your password to get to 'User Information'
Un-check the 'Active' check-box, under, 'User Information', when a user is no longer with your organization. The user name is retained in the database, however the user may no longer log in.