ARUP Connect™
Account Administration

Administrator Manual

October 2015

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ARUP Connect™ - Administrator User's Manual

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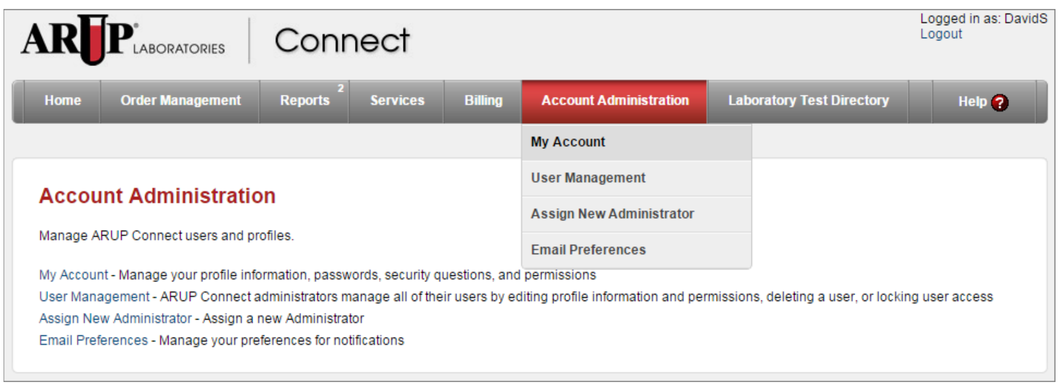
October 2015 Ver. 7.5

Account Administration Introduction

The Account Administration functionality is used by client administrators and sub-administrators to manage access and services for individual users in the client organization.

When logged in to ARUP Connect™, administrators and sub-administrators see the following options under **Account Administration**:

- **My Account**. Edit your own account settings.
- **User Management**. Set up and maintain account settings for other users.
- **Assign New Administrator**. Assign your administrator duties to another user and change your own level of responsibility.
- **Email Preferences**. Manage your email and notification preferences.



The following briefly describes the types of ARUP Connect users and their permissions and limitations. More detailed information for setting up users is provided later in this manual.

User Types

ARUP Connect has three types of users: administrators, sub-administrators, and regular users. ARUP must set up administrators. Administrators are responsible for managing sub-administrators and regular users. Sub-administrators can manage regular users. The following briefly describes the functionality available to each user type.

Administrator

- Can be an administrator for one or more client IDs.
- Can edit his/her own account information and settings.
- Can set up and change regular client users and assign access permissions for those users under specified client IDs.
- Can set up and change sub-administrators and assign access permissions for those sub-administrators under specified client IDs.
- Cannot set up or change settings for other administrators. Only ARUP can set up or change administrators.

Sub-Administrator

- Can be a sub-administrator for one or more client IDs.
- Can edit his/her own account information and settings.
- Can set up and change regular client users and assign access permissions for those users.
- Cannot set up or change settings for other sub-administrators or administrators.

Client User

- Can access services to which they have been given permission under one or more client IDs.
- Can change his/her own password and security questions, and may unsubscribe to subscribed services. Cannot add permissions.

Note: Separate user manuals provide instructions for each of the services and applications available within ARUP Connect. This manual provides instructions for only Account Administration functions.

My Account

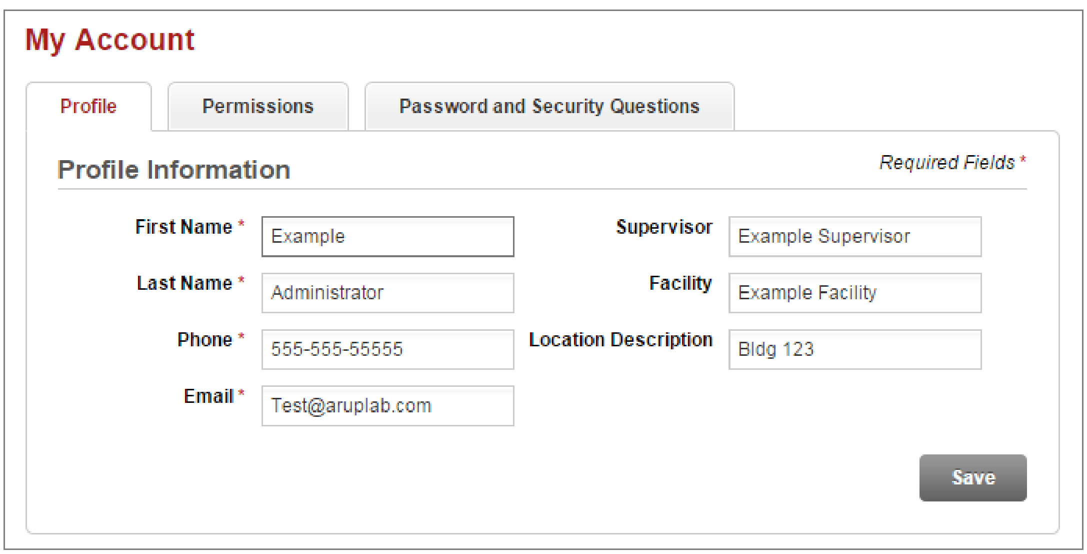
The My Account page allows the user to edit certain information for their own account. Regular users can edit their passwords and security questions. Administrators and Sub-Administrators can edit their own passwords and security questions, and can also edit their own profile information. To edit your own account, select **Account Administration** > **My Account**.

When making changes, you do not need to enter data in all sections. You can change information in just one section without affecting the existing information in other sections. Do not be concerned that the fields in the other sections remain blank.

Administrators and Sub-Administrators

Profile Information

Select the **Profile** tab to view or modify any of your profile information. Remember that fields marked with an asterisk are required and may not be left blank. When you are finished making changes, click **Save**.



Permissions

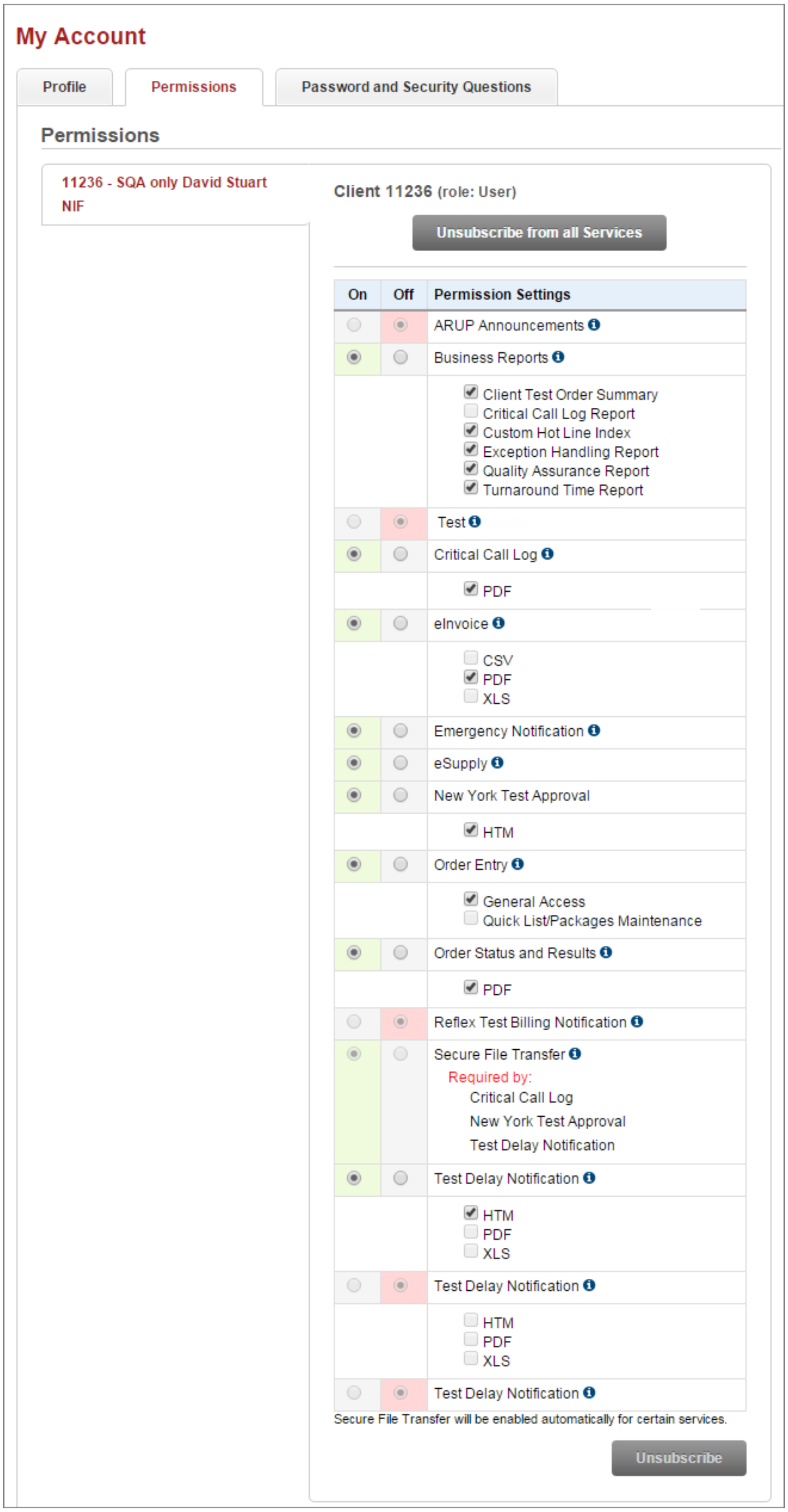
Select the **Permissions** tab to view or modify permissions. Hover over the ⓘ icon for a brief description of a service. You can edit your permissions for specific services under designated Client IDs.

To manage permissions:

1. Click the **On** or **Off** radio buttons next to the desired service to add or remove it. Administrators and Sub-Administrators also have to option to click the **Unsubscribe from all Services** button to unsubscribe from all services, when applicable.

2. When you are finished updating permissions, click **Update**.

   A message displays notifying you whether or not the account was updated successfully. If the update failed, check to ensure you have entered information in all required fields and selected at least one document type for services that require it, and then click **Update** again.


My Account
Profile
Permissions
Password and Security Questions
Permissions
11236 - SQA only David Stuart NIF
Client 11236 (role: User)
Unsubscribe from all Services
On
Off
Permission Settings
ARUP Announcements
Business Reports
Client Test Order Summary
Critical Call Log Report
Custom Hot Line Index
Exception Handling Report
Quality Assurance Report
Turnaround Time Report
Test
Critical Call Log
PDF
eInvoice
CSV
PDF
XLS
Emergency Notification
eSupply
New York Test Approval
HTM
Order Entry
General Access
Quick List/Packages Maintenance
Order Status and Results
PDF
Reflex Test Billing Notification
Secure File Transfer
Required by:
Critical Call Log
New York Test Approval
Test Delay Notification
Test Delay Notification
HTM
PDF
XLS
Test Delay Notification
HTM
PDF
XLS
Test Delay Notification
Secure File Transfer will be enabled automatically for certain services.
Unsubscribe

Private Options. Some of the services available to ARUP clients are labeled "Private." These services are only available to certain clients under applicable circumstances. For example, the ARUP Gateway private service is available to clients who take advantage of this customizable online laboratory test directory through ARUP. If you have been granted access to a private service, it is not automatically selected. You will need to click the check box if you want this service to appear in your Connect menus.

- As with other options, some private services will also require you to select a document type such as PDF, XLS, etc.

- In the case of the **ARUP Gateway** service, select just one check box. Select **Admin** for any individual who is to have administrative responsibilities in Gateway. For non-administrators in Gateway, select **View Private Data**.

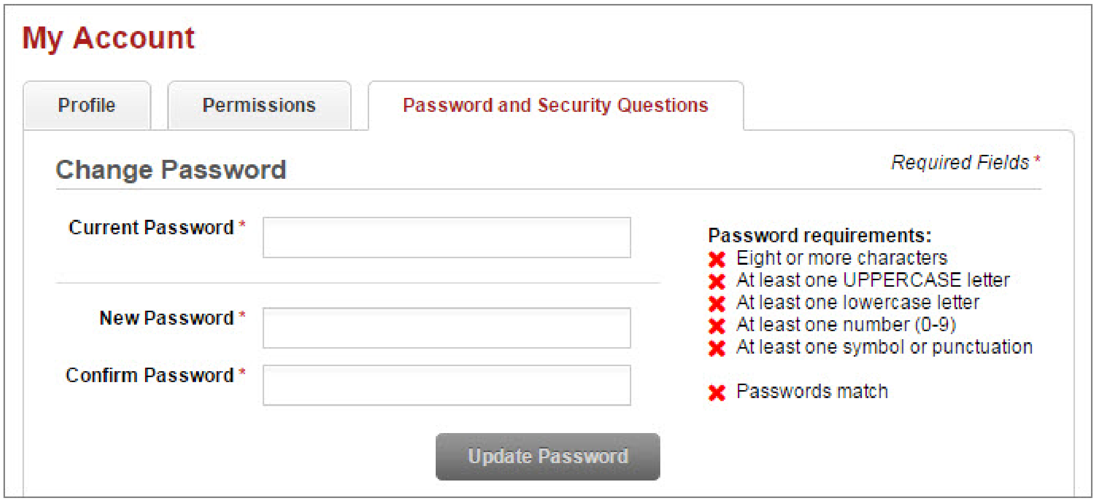
Change Password

Select the **Password and Security Questions** tab to change your password. All users can change their own passwords at any time. Passwords are changed in the following events, but may also be changed at any time a user determines it to be necessary.

- All new users must log in with a temporary password and then enter and confirm a password of their own choosing.

- The system will require you to change your password at least every six months. A few days before a password expires, you will be reminded to change it. If you do not do so, on the day the password expires you will be unable to log in to ARUP Connect until you complete the task of changing your password.

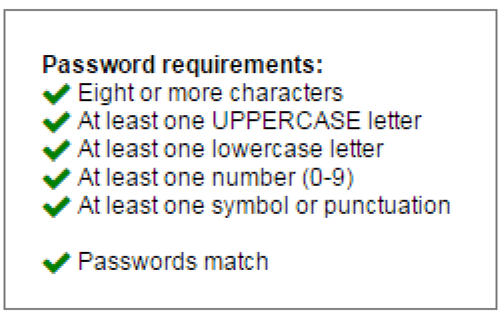
- If you forget your password, you can answer your security questions to obtain a temporary one-time password which will allow you to log in and change your password.



To change your password:

1. In the **Current Password** field, enter your current password. If you were given a temporary password (for first-time users or forgotten password), enter the temporary password.

2. In the **New Password** field, enter the new password. Passwords must meet the requirements that display in the Password Requirements area. As you meet the requirements, the ✖ updates to ✔.



3. In the **Confirm Password** field, enter the new password again. You must enter the password *exactly* the same.

4. Click **Update Password**.

Note: You cannot reuse the same password within eight password changes. If you attempt to do so, the system will prompt you to choose a different password.

Change Security Questions

Select the Password and Security Questions tab to manage your security questions. All users can change their own passwords at any time.

Security questions are questions to which only you would be likely to know the answers but will be easy for you to answer when needed. If you forget your password, you can have your password reset by correctly answering both of your security questions.

First-time users are required to set up their security questions the first time they log in. It is optional but not required to change security questions when a password is changed.

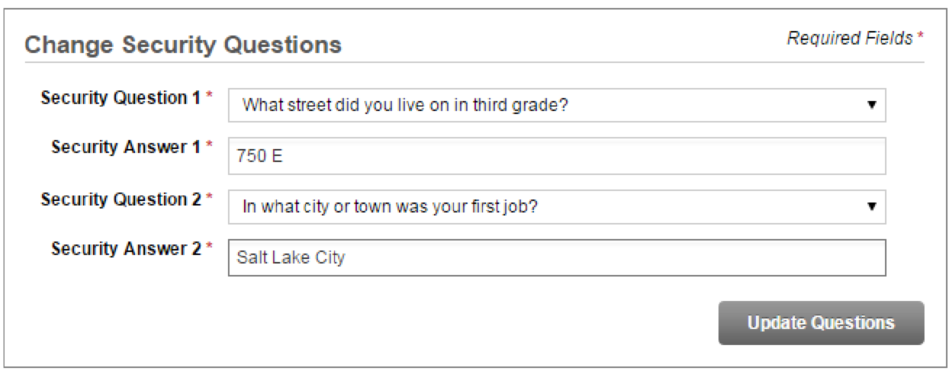
To change your security questions:

1. In the **Security Question 1** field, select your first security question from the drop-down list.

2. In the **Security Answer 1** field, enter your answer to the first security question.

3. In the **Security Question 2** field, select your second security question from the drop-down list.

4. In the **Security Answer 2** field, enter your answer to the second security question.



5. Click **Update Questions**.

User Management

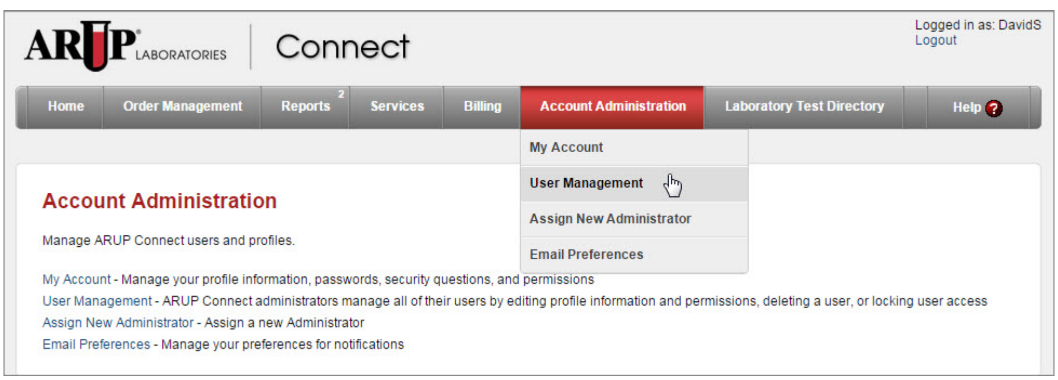
The User Management page is for setting up and maintaining regular users and sub-administrators.

- **Administrators can manage regular users and sub-administrator accounts.**
- **Sub-administrators can manage regular user accounts.**
- **Only ARUP can manage Administrator accounts.**

If you find some options are not available to you, it means you don't have administrative rights for that particular option. For example, an administrator cannot manage another administrator's settings.

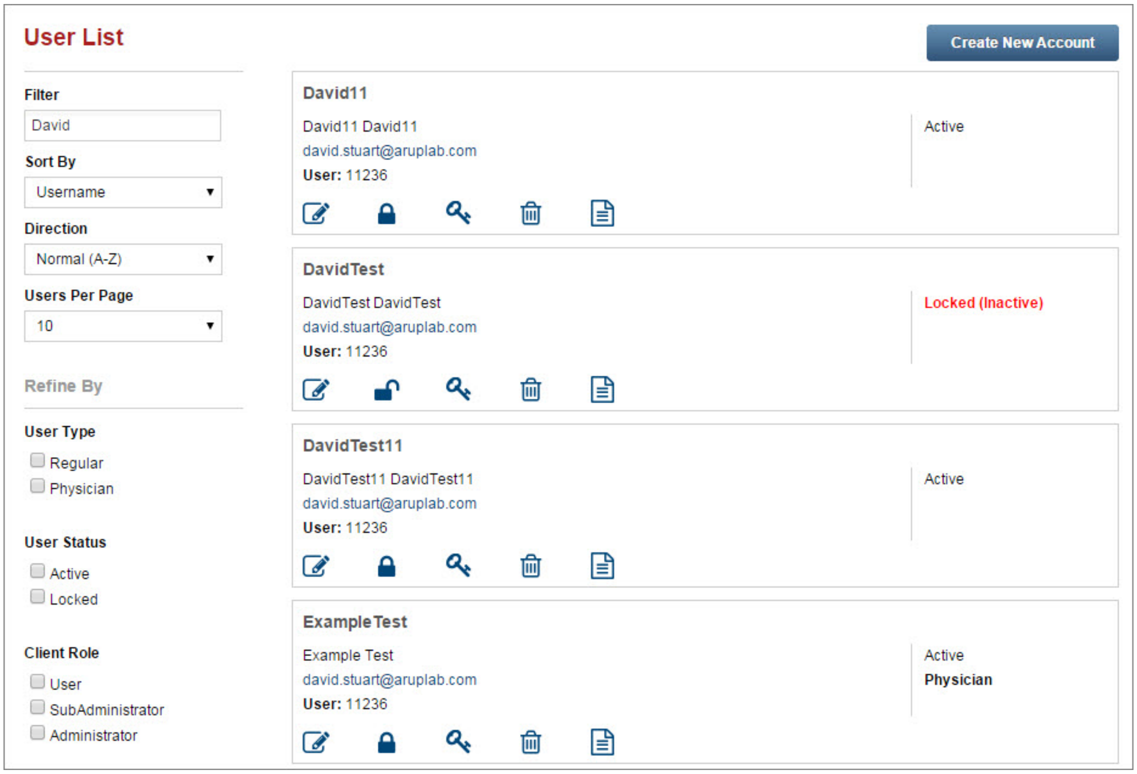
Access User Management

To open the User Management page, log on to ARUP Connect and select **Account Administration** > **User Management** from the drop-down list to add new users or to edit existing user information.



Find an Existing User

When you select **User Management**, a User List of existing users for your organization is displayed. At this screen you can find and edit existing users or create new users. The following is an example of the User List.



Use the following tools to manage the User List and locate specific users:

- **Filter**. To find a specific user, type any portion of the user's first or last name, user name, or email address into the **Filter** field. As you type, the list becomes limited to just records matching the filter text you enter. To return to the full list, clear the text from the **Filter** field.

- **Sort By**. To sort the User List by **Username**, **First Name**, **Last Name**, or **Email**, select the desired term from the **Sort By** drop-down menu. The application will filter the User List alphabetically, based on your selection.

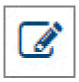
- **Direction**. To update the direction of how items display in the User List, select a direction from the **Direction** drop-down list. You can select **Normal (A-Z)** to have the list display alphabetically or **Reversed (Z-A)** to have the list display alphabetically in reverse order.

- **Users Per Page**. To update the amount of user results that display per page, click the **Users Per Page** drop-down menu, and select the desired amount of search results to display.

- **Refine By**. To refine the User List by specific User Type, User Status, Client Role, or Clients. You can make single or multiple selections. The User List will display only user's that match your selection(s).

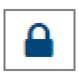
When you locate the desired user, you can Edit a User Account, Lock a User Account, Reset a User Password, Delete a User Account, or View a User Log by clicking the applicable icon. If you do not see these icons for a specific user, you cannot edit, lock, delete or view the log for that user as they are at the same permission level as you or higher. The following section explains the icons and their functions.

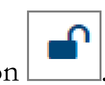
Edit a User Account

 Click the **Edit** button to open the Edit Account page for the selected user and edit profile information and/or permissions. Once you are finished, click **Save**.

See Find an Existing User for more information on finding a specific user account to edit.

Lock a User Account

 Click the **Lock** button to lock the account for the selected user. This option is used to block an existing user's access to ARUP Connect™ without deleting the user account. Clicking the Lock button blocks the user but retains the history log for that user.

After clicking the **Lock** button, it updates to the **Unlock** button . Click the **Unlock** button to unlock a user's account.

Reset a User Password

 Click the **Reset Password** button to reset the password for the selected user. A Temporary Password is automatically generated.

Copy the temporary password and give it to the new user. The user will need this temporary password in order to log on to ARUP Connect.

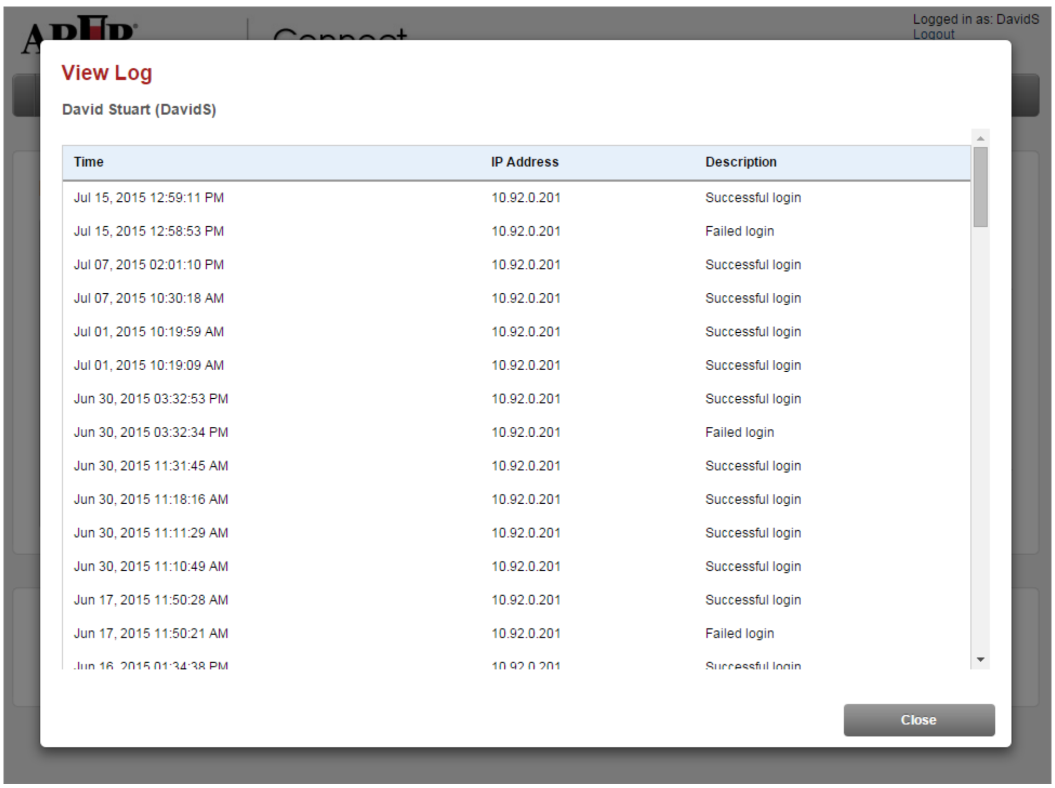
Delete a User Account

 Click the **Delete** button to delete the account for the selected user. When a user leaves employment with the client or otherwise no longer requires access to ARUP Connect, the user name should either be deleted or inactivated (locked). Click the **Delete** button to remove the selected user account and permissions. A confirmation message is displayed asking you to confirm. Click **Yes** to complete the deletion, or click **No, Cancel** to cancel the delete action. Deleting a user removes your record of that user's profile and activity log. If you do not wish to delete the activity log for a user, you have the option of locking the account instead of deleting it to prevent access by that user.

View a User Log

Click the **View Log** button to open a View Log window displaying up to 100 of the latest user attempts to log on to ARUP Connect over the previous week for the selected user. The log shows the user, date and time of the event, IP address where the attempt originated, and a description of the result (Successful Login, Failed Login). You can also right-click on the screen and select **Print** to print the selected user log.

Note: The IP address may or may not be significant information since a single IP address may be used by the entire organization. Click the **Close** button to return to the previous screen. The following is an example of a log.



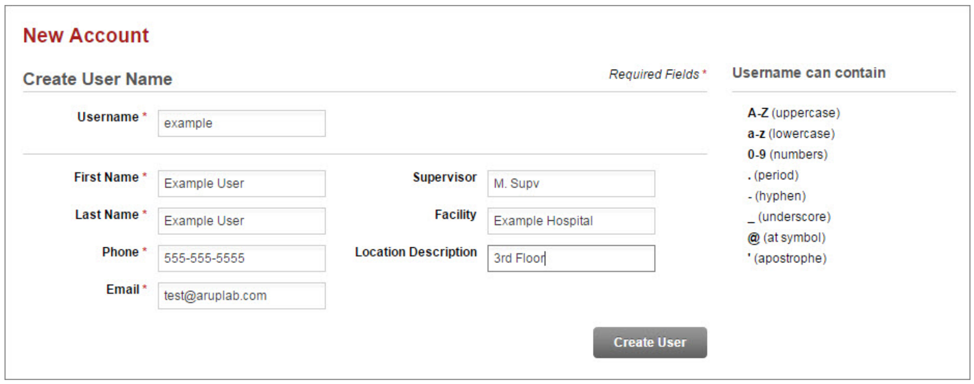
Create a New User Account

Before setting up a new user, search the User List to ensure they don't already have an account set up. See Finding an Existing User for more information on searching the User List.

To set up an account for a new user:

1. From the User Management screen, click the **Create New Account** button.

The New Account screen opens where you will enter the user information.



2. Enter the following information for the new user. Required fields are marked with an asterisk (*) and may not be left blank. Other fields are optional.

   Username. Enter a user name for use logging on to ARUP Connect (required).

   You do not enter passwords for users. A temporary password will be automatically generated (one-time use) for you to give to the user. If a user forgets their password, they have the option of resetting their own password by answering their security questions, or you can generate another temporary (one-time use) password for them. See Reset a User Password for more information.

   First Name. Enter the user's first name (required).

   Last Name. Enter the user's last name (required).

   Phone. Enter the user’s work phone number (required).

   Email. Enter the user’s work email address (required).

   Supervisor. Enter the name of the user’s supervisor (optional).

   Facility. Enter the facility where this user works (optional).

Location Description. Enter a brief description of the user's work location (optional).

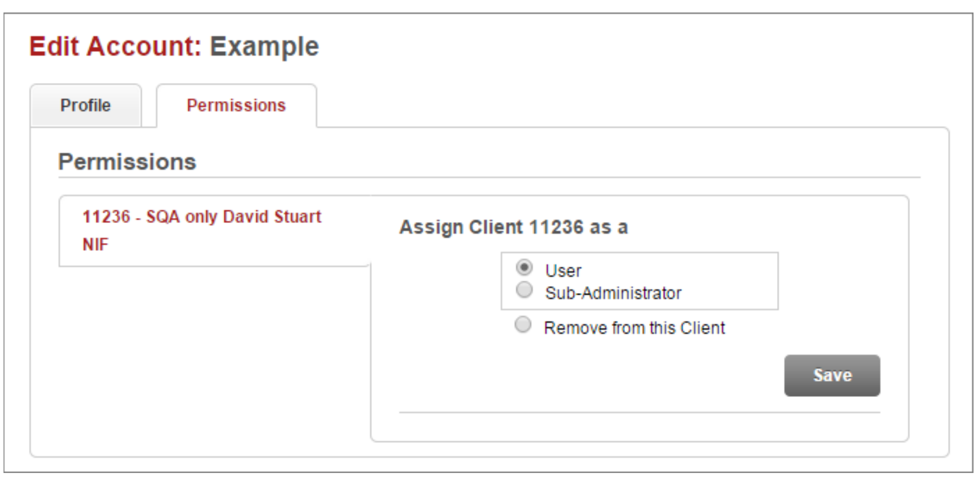
3. Click **Create User**.

   A Temporary Password is automatically generated.

4. Copy the temporary password and give it to the new user. The user will need both their user name and this temporary password to log on the first time. The user will be required to enter and confirm a password of their own choosing and select two security questions and enter answers for them at the first log on. See [My Account] for more instructions on entering passwords and security questions.

5. Click **Close**. The **Permissions** tab opens.

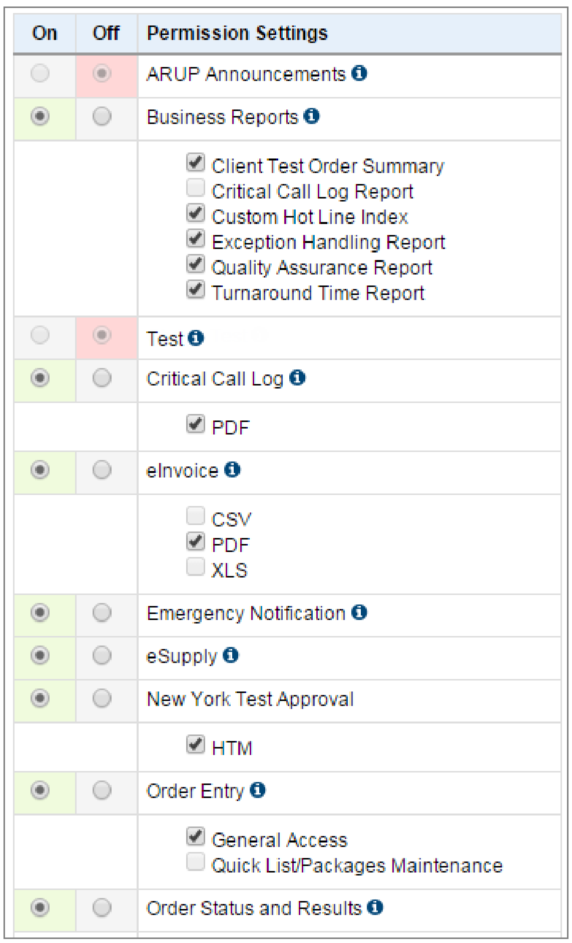
6. In the **Assign to Client ###### as a** area, select the type of user desired. A regular **User** is specified by default. Click **Sub-Administrator** if you wish to give administrative duties and permissions to this user. A Sub-Administrator can set up other users but cannot set up other Administrators or Sub-Administrators. A regular user has limited administrative permissions for their own account only. Click **Remove from this Client** to remove permissions under this client ID.



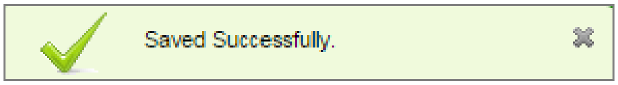
7. When you are finished, click **Save**. The **Permission Settings** display.

   Hover over the icon for a brief description of a service.

8. Click the **On** radio button for each service you wish to make available to this user under this client ID. Services you turn on will appear as menu options when the user logs on to ARUP Connect. Click the **Off** radio button to turn off services. Some services also require you to select a report format (such as PDF, XLS, etc.) or additional settings related to the service. Where these are noted, you must select at least one format before you will be able to save the user information.



9. When you are finished selecting services, click the **Update** button at the bottom of the window. A message will be displayed to tell you whether or not the update was successful.



If the update was not successful, check to be sure you have completed all required fields and you have selected at least one document type for services that require it. After completing all required fields, click **Update** again. If you try to navigate away from the page before clicking **Update**, the software will notify you that you have not yet saved your changes.

Private Options. Some of the services available to ARUP clients are labeled “Private.” These services are only available to certain clients under applicable circumstances. For example, the ARUP Gateway private service is available to clients who take advantage of this customizable online laboratory test directory through ARUP.

- As with other options, some private services will also require you to select a document type such as PDF, XLS, etc.

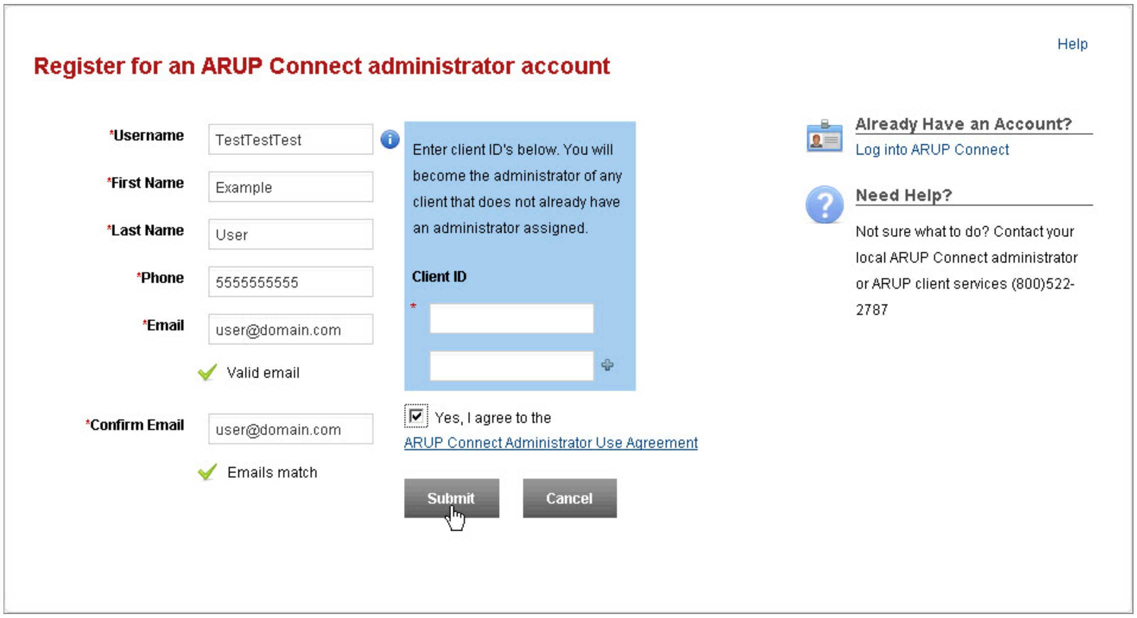
- In the case of the **ARUP Gateway** service, select just one check box. Select **Admin** for any individual who is to have administrative responsibilities in Gateway. For non-administrators in Gateway, select **View Private Data**.

eExcept Access. If the eExcept service is turned off and unassignable, you can request access by clicking **Request Access** next to the service name. A dialog box opens with the estimated time before ARUP will contact you and complete the subscription process. Only Administrators and Sub-Administrators have the ability to request the eExcept service.

Email Requests

You may occasionally receive an email from ARUP Connect with a request from an individual in your organization to be given access to ARUP Connect. This email is generated when the person completes an online registration form.

At the main login page for ARUP Connect, there is a link called **Register for ARUP Connect Services**. While this link is primarily intended for setting up an administrator for a new ARUP Connect client, any person could possibly use this link to request access to ARUP Connect. After clicking the link, they will complete and submit the following form:



The information from the form is forwarded by email to the administrator for action. You can set up the new user account and/or contact this individual as needed. Click on the link in the email to go directly to user setup in ARUP Connect. The information from the form will already be pre-populated there and you will simply need to complete the setup as you would with any new user.

Assign New Administrator

Use the following process to assign your own administrator duties to another user, assign new rights, or remove all rights for yourself. From the **Account Administration** menu select **Assign New Administrator**. A window opens with a list of clients for whom you are currently an administrator.

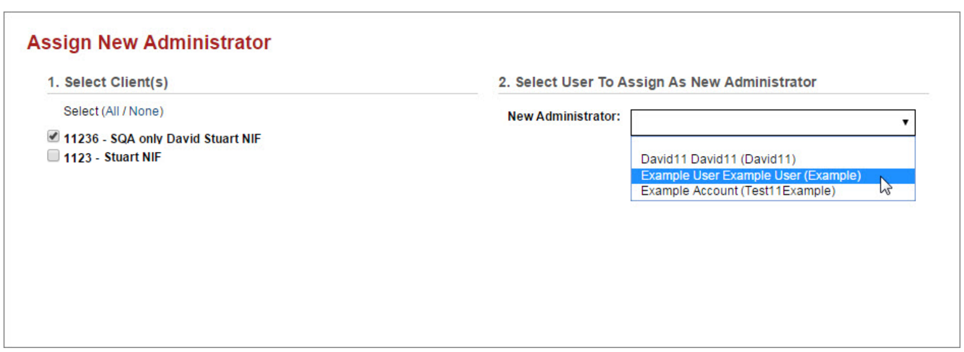
1. In the **Select Client(s)** section, select the check box for each client ID you wish to assign to a new administrator. If you are assigning all client IDs listed, click the Select **All** link. To unselect all check boxes, click the **None** link.

   Note: If you are administrator for only one client ID, you will not see step 1 as described above. But your steps 1 and 2 will be the same as steps 2 and 3.

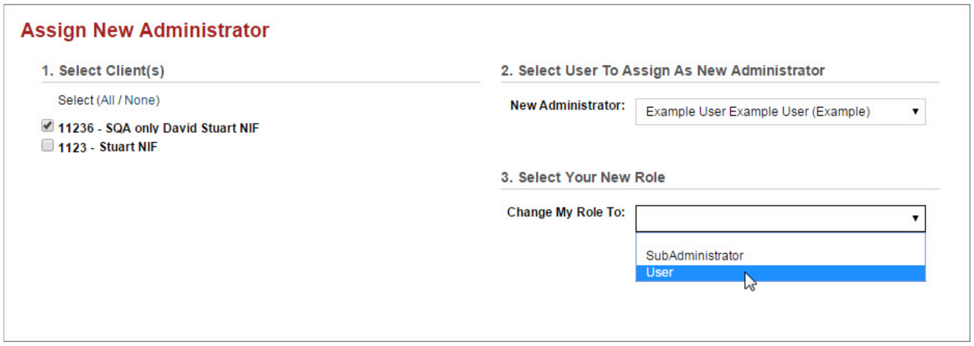
   The **Select User To Assign As New Administrator** section appears.

2. From **the New Administrator** drop-down, select the name of the user to be the new administrator. You can type the first characters of the user's name to scroll quickly to that name and select it in the list.

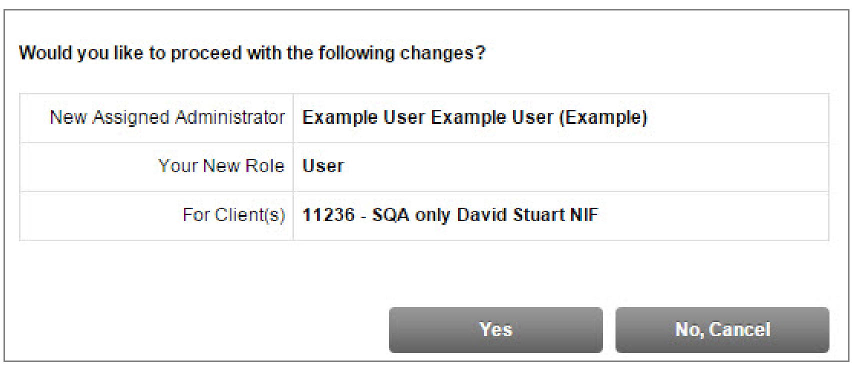
The **Select Your New Role** section appears.

3. From the **Change My Role To** drop-down, select your own new authorization level for the selected client ID(s): Sub-Administrator, or User, for the Seleted Client ID(s).



4. Click **Sumit Changes**.

A warning message displays the updates for the selected client ID(s) if you proceed. Click **Yes** to complete the assignment. Or click **No, Cancel** if you do not wish to complete the assignment.



When the new administrator next logs in to ARUP Connect, they will see the following window where they will be required to confirm they accept the assignment as administrator. The new administrator should first click the link to read the **ARUP Connect Administrator User Agreement**. The user should then click the check box to select it and click the **Continue** button. After the new administrator clicks **Continue**, the system will display the main ARUP Connect window including the Administrator menu options.

Email Preferences

Go to **Account Administration > Email Preferences** to modify your Email notification preferences.

- Connect Downtimes
- Hot Lines
- Product Releases
- ARUP Announcements
- Business Reports
- eExcept
- eInvoice
- Order Status and Results
- Secure File Transfer

Email notifications are sent to the Email Address listed under My Account, Profile Information.

To receive email notifications:

1. Select the check box next to the desired notification type.
2. Use the drop-down menus to modify the frequency of the notifications.
3. Scroll down to the bottom of the page and lick **Save**.

Quick Reference for Administrators

QuickRef_Admin.pdf