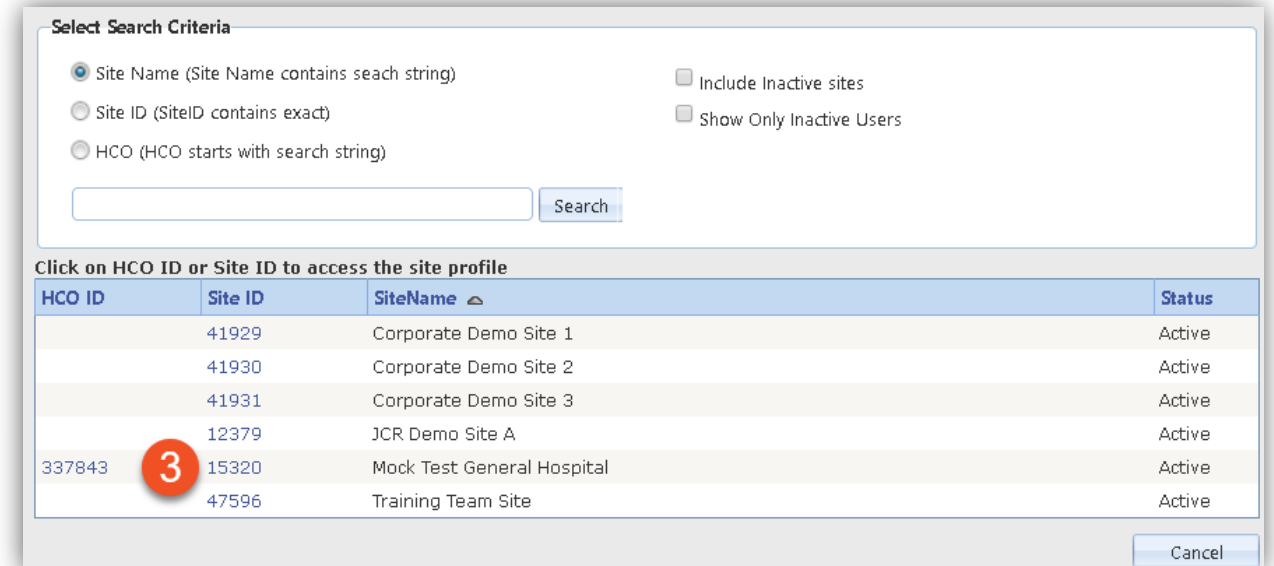
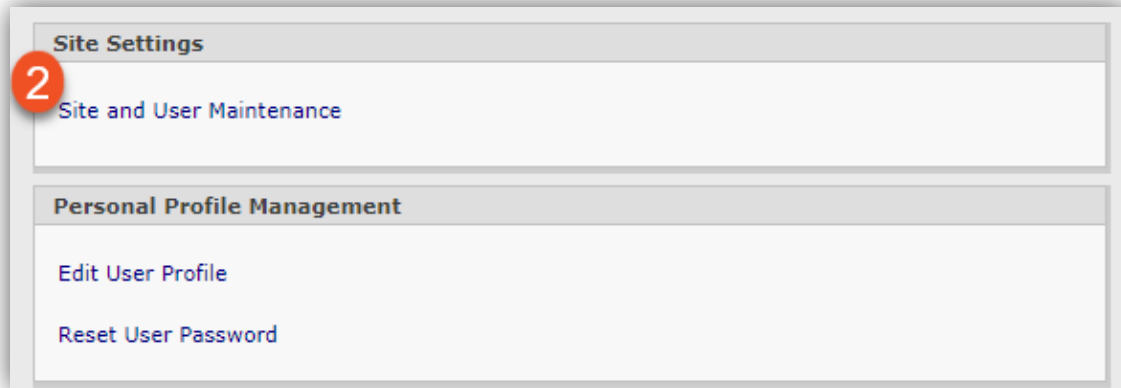
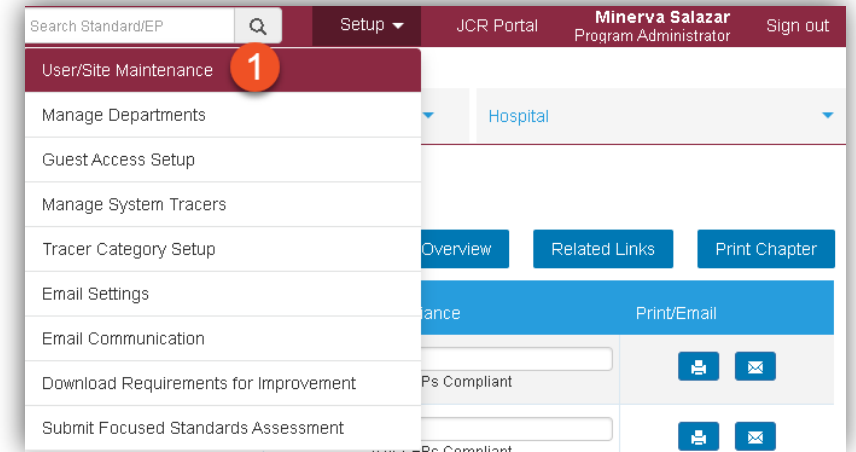


# User Management

## Update User and Access Information

Program Administrators manage all users and Tracers Guest Users in the Update User and Access Information section under Site and User Maintenance

1. From the Setup menu, click **User/Site Maintenance**
2. From the Application Administration page, click **Site and User Maintenance**
3. Click the **Site ID** for the desired site



# User Management

## Update User and Access Information Overview

1. Click **Update User and Access Information**
2. Use the User Search Options to filter and search for users
3. Click the **User ID** to access the user profile (reset password, Activate/Inactivate)
4. Click **Remove** to remove the user from the selected site (User will remain active on other assigned sites)
5. Click **Change Role** to change the user's role. Additional roles can be added by checking the desired role
6. Click **Activate** to create a Tracers Guest User as a system user with a Login ID and password
7. Use AMP Access, Tracers Access, and Analytics Access to update user's access to AMP, Tracers, and Analytics

Update User and Access Information | Update Site Profile | Manage Guest (Proxy) Links | Data Migration Reset | < Back

1

Click on "Update Site Profile" to edit site info

Site ID: 12379	Address: 10501 Golf Course Rd
Site Name: JCR Demo Site A	Address:
Retain Site Name Edits: Yes	City: Santa Fe
HCO ID:	State: New Mexico
Status: Active	ZIP: 87114
Site Type: Single	

Cancel

**NOTE:** AMP Access, Tracers Access, and Analytics Tool Access MUST be updated individually. Only select one checkbox at a time and click **Apply** for the selected option

2

User Search Options

Email  UserID (Exact Match)  Last Name  First Name

Show Only Active Users  Show Active and Inactive users  Show Only Inactive Users  Show Only Guest Users

Search

Click on User ID to access the user profile

User ID	Last Name	First Name	Email	Status	User Role	Remove User	Change Role	AMP Access	Tracers Access	Analytics Tool Access
229152	125	Test	test123@jcrz.com	Active	Staff Member	Remove	Change Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
355247	Allen	Barry	cody.dailey0717@gmail.com	Active	Staff Member	Remove	Change Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
292011	Boland	Mike	mboland@jcrinc.com	Active	Program Administrator	Remove	Change Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
367544	Brown	Maddy	mbrown@hospitalabc.com	Active	Staff Member	Remove	Change Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
289227	Caisley	Elizabeth	elizabeth.caisley31@gmail.com	Active	Guest User	Remove	Change Role	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

3

4

5

6

7

**NOTE:** Click the blue headers to sort the user list

# User Management

## Assign a User to a Site

1. Select the desired **User ID** from the Update User and Access Information page, then click **User Site Affiliation**
2. Click **Assign to existing site**
3. Search for the desired site using any of the search criteria
4. Click **Select** for the desired site

User site Affiliation | Update User Profile | Reset User Password | < Back

Click on "Update User Profile" to edit user info  
User Details for: Maddy Brown

User ID: 367544  
Last Name: Brown  
First Name: Maddy  
Middle Name:  
Email: mbrown@hospitalabc.com  
Mobile Phone:  
Status: Active

< Back

Site Affiliation for Maddy Brown (367544)

Assign to existing site | Modify Assignments

HCOID	Site ID	Site Name ▲	Status	Role	Default Site
	12379	JCR Demo Site A	Active	Staff Member	

Cancel

Assign site for Maddy Brown

3

Site Name (Site Name contains search string)  
 Site ID (SiteID contains exact)  
 HCO (HCO starts with search string)

41929 Search

Site ID	SiteName ▲	HCO	Status	Expiration	Parent	Select
41929	Corporate Demo Site 1		Active			4

# User Management

## Assign a User to a Site

5. Set the role(s), more than one role can be selected for one user.
6. Select AMP, Tracers, and/or Analytics Access
7. Click **OK**

**NOTE:** For Mock Survey clients, only one Mock Survey role can be selected per user in addition to other roles.

**Assign Existing Site**

Select Role for site Corporate Demo Site 2

5 Role:  Mock Survey Reviewer  
 Mock Survey User  
 Program Administrator  
 Site Manager  
 Staff Member

**Access to AMP** 6  
AMP Access:

**Access to Tracers**  
Tracers Access:

**Access to Analytics Tool**  
Analytics Tool Access:

7 OK Cancel

**NOTE:** If more than one role associated to the email address, they will be displayed as a dropdown on the top right corner within AMP, Tracers and Reports.

# User Management

## Activate/Inactivate User

A user can only be removed from a site if they are affiliated to more than one site. Changing user status to inactive will disable the user's credentials for all sites. The user will still appear in the User List when the "Show Active and Inactive Users" option is selected.

1. Select the desired User ID from the Update User and Access Information page, then click **Edit User Profile**
2. Use the Status drop-down box to change the user's status to either Active or Inactive
3. Click **Save**

User site Affiliation | Update User Profile | Reset User Password | < Back

Click on "Update User Profile" to edit user info

User Details for: Maddy Brown

User ID: 367544  
Last Name: Brown  
First Name: Maddy  
Middle Name:  
Email: mbrown@hospitalabc.com  
Mobile Phone:  
Status: Active  
Analytics Role: Viewer  
Created by: Minerva Salazar  
Create Date: 8/8/2019 3:38:52 PM  
Updated by: Minerva Salazar  
Update Date: 8/9/2019 2:53:45 PM

Cancel

Edit User Profile for: Maddy Brown

\* Required field

User ID: 367544

\*Last Name: Brown

\*First Name: Maddy

Middle Name:

Email: mbrown@hospitalabc.com

Mobile Phone:

2 Status: Active

Created by: Minerva Salazar

Create Date: 8/8/2019 3:38:52 PM

Updated by: Minerva Salazar

Updated Date: 10/17/2019 2:35:11 PM

3 Save Cancel