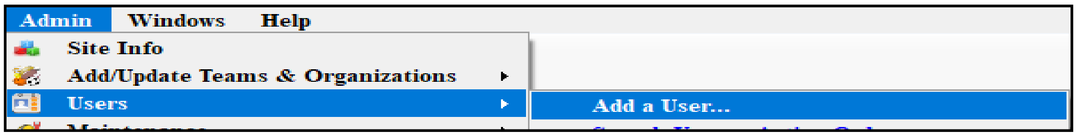
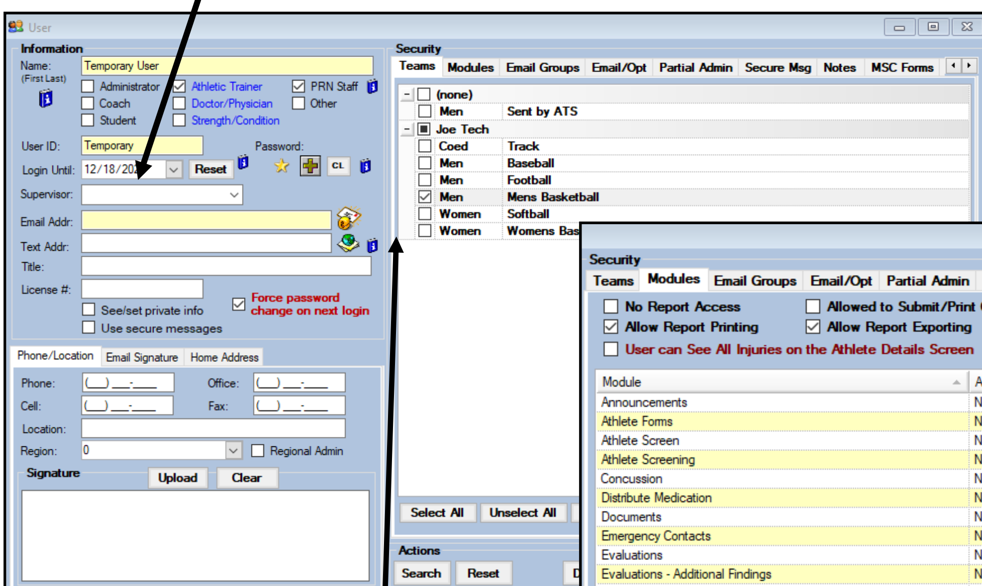
ATS – Temporary User

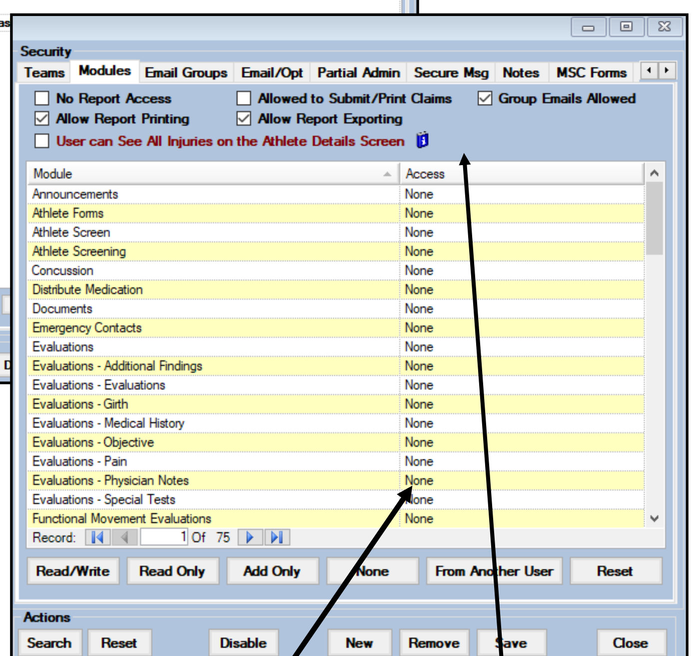
There are times when a temporary or limited time user needs to be added to your database. This could be possibly a visiting AT, a PRN employee covering session, a hospital if you are on the road and need more emergency information. Below are some basic recommendations to get you started with a temporary user, this should be further configured based on your organization, and settings necessary.



Recommendation #1:

Begin by setting the user's ID and password as you are creating a regular user. Make sure to assign them to the PRN or Other. Only for a Temporary User do we recommend filling in the log in until date, preemptively; this ensures they have to be reactivated to regain access. Once that date passes they will have to contact the administrator of the system to log back in.





Recommendation #2:

Assign the temporary user to the correct team or teams.

Recommendation #3:

Assign appropriate module access. By default they are set to none. Give as much or little access as necessary.

Also, this user should either be granted, or cleared of their access for reports, group emails, and other details at the top of the screen.

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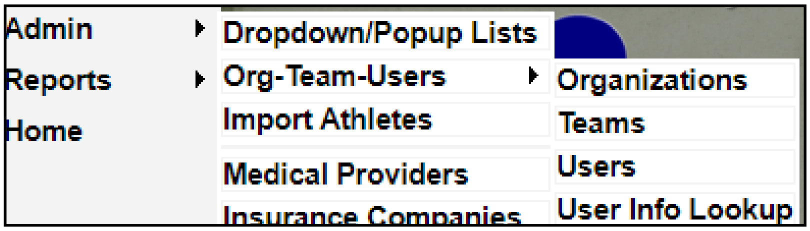
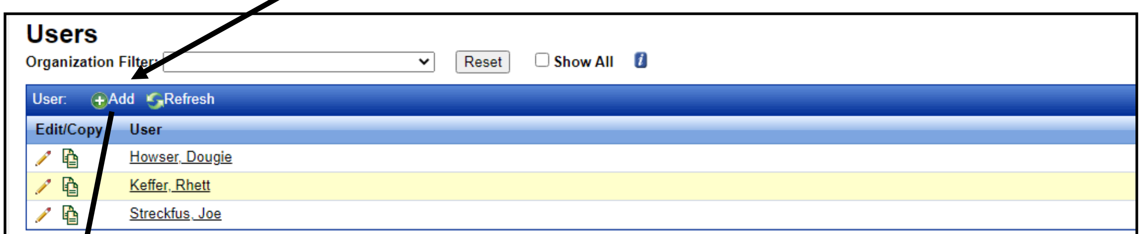
Creating Temporary User on the Core Portal

ADMIN—> Org-Team-Users—>Users



Once you load the users page, use the +Add button to open a new user page.



Follow the same setup procedures as the core, assigning the user to a team, granting module access, restricting or allowing other functions.