



## Administration Dashboard

Manage your entire group with the Administration Dashboard and be in control of users and rules established on each account. Have the ability to manage users and rules on individual accounts or at a group level. To get more information on how the tool works, see below.

If you would like access to this feature, please contact your sales rep. User Management and Rules Management are 2 separate features so if you would like both features added to your user profile, please request access to both.

Please note that only 1 user should have this added to their profile per Organization.

### Administration Dashboard Home

- Displays general settings for the Organization. Edit these options by clicking on the Edit button.
- If Rules are created in the Org, search rules and see how many are in the Org. Also, you may create rules that will enable you to customize the account and put certain restrictions on orders to go to a supervisor for review and approval.
- Review how many users are in the Org along with seeing the list of all users by clicking on the View all users link. Also you are provided a quick snapshot of any users that are locked or have passwords expired. You may search and create users quickly.
- Shows all accounts and groups that are part of the Org.



## Administration Dashboard

### How to Create User

#### Create User

**A** \* indicates required field

Organization: **Medline Demo Account**

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First Name \*

Last Name \*

Email Address \*

Contact Phone Number \*  ext

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Username \*

Password \* **B**  Automatically generated password  
 Specify password

Notification:  Email password to user

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Occupation/Role \* **C**

Base Role \* **D**

Additive Role **E**  Maintain GL Codes  
 Maintain Customer Item Numbers  
 Approve to Pav

Special Additive Role  Insight Reporting

Account Access List \* **F**  Inherit all access list from organization  
 Select accounts in organization [Select](#)



## Administration Dashboard

- All fields that have the asterisk are required fields when creating a new user.
- Have 2 options when setting up a new user to have a system generated password created which is set by default.  
Also you may specify a password. Note: Passwords are just one time passwords and when a new user logs on with the password, they will be prompted to change their password.
- Choose the users business occupation/role from the dropdown.
- Choose from multiple options, hover over the gray "?" to get a detailed explanation of each role.
- Optional: Grant access to users to use these additional tools, for more information on each tool, visit the help pages using the links provided for [Customer Item Number](#), [GL Codes](#), [Approve to Pay](#), and [Online Bill Pay](#).
- Select specific accounts to give to users by clicking on the blue Select option. Or give users access to all accounts that are part of the Org by selecting the Inherit all option.

### How to Search User

The screenshot shows a 'Search User' form with the following fields and options:

- Search for:** Text input field with callout A and a help icon.
- Email Address:** Text input field with callout B.
- Base Role:** Dropdown menu with 'Any' selected, callout C, and a help icon.
- Additive Role:** Dropdown menu with 'Any' selected, callout D, and a help icon.
- Status:** Dropdown menu with 'Any' selected.
- Account Access List:** Radio button options: 'Any Accounts within Organization' (selected, callout E) and 'Select accounts in organization' (with a blue 'Select' link).

Buttons: 'Search' (green) and 'Reset' (gray).

- Search for users by either their first or last name. If this field is left blank when performing a search, all users will be listed dependent on the rest of the criteria selected.
- Search by a specific email address.
- Search for a specific type of user by clicking on the dropdown to make your selection.
- Search for users that have an additive role such as maintaining Customer Item Numbers, GL Codes, Approve to Pay, or Online Bill Pay.
- Search for users within the whole Organization or be able to search on selected accounts.



## Administration Dashboard

### Search User

Search for:

Email Address:

Base Role:

Additive Role:

Status:

Account Access List:  Any Accounts within Organization  
 Select accounts in organization [Select](#)

✓ Your search has returned the following 17 records

Showing 1 - 17 of 17 Results

User Name	Last Name	First Name	Email Address	Status	Base Role	Additive Role	Account Access List
<a href="#">BBuyer</a>	Buyer	Betty		Active	Standard User		Inherit from Org
<a href="#">ademo</a>	Demo	Amanda		Active	Standard User		1470371
<a href="#">anotherdemo</a>	Demo	Susan		Active	Standard User (No Price)		1470370...more
<a href="#">bdemouser</a>	Demo	Betty		Active	Standard User		1470371

- Once the search has been executed and the search results have been displayed, be able to export the list of users into an excel file using this feature.
- Review all the different information per user such as the email address on file, their current status, the user's base role, if they have any additive roles, and also what accounts they have access to.
- Click on the username to change view and/or change any of the user's information.



## Administration Dashboard

### How to Edit Users

The screenshot shows the 'User Info: BBuyer' page. At the top, there are three buttons: 'Change Password' (green), 'Copy User', and 'Deactivate User'. Below these are sections for 'Status' (Active), 'Personal Information' (with an 'Edit' button), 'Account Access List' (with an 'Edit' button), 'User Settings' (with an 'Edit' button), and a table of user details. Red circles with letters A-F are placed over the buttons and sections: A over 'Change Password', B over 'Copy User', C over 'Deactivate User', D over the 'Personal Information' section, E over the 'Account Access List' section, and F over the 'User Settings' section.

Field	Value
User ID:	2287182483
Registered:	04/30/2015 12:58 PM
Last Activity:	12/11/2017 03:10 PM
Last Password Update:	09/19/2017 11:36 AM
Terms of Use Approval:	04/30/2015 12:00 AM
Organization ID:	242081
Organization Name:	Medline Demo Account
Base Role:	Standard User
Additive Role:	
Password Expiration:	180 days
User Locked Due to Inactivity:	180 days
Session Timeout:	30 minutes

- Change a password for a user, this is beneficial if a user is locked out of their account or they have forgotten their password. Give the user a temporary password to log back into their account.
- This feature will copy a user's base role, any additive roles that they may have, along with the accounts that they have access to.
- Deactivating a user will essentially delete their user profile. This is useful for a user that has left your company. Once the profile is deactivated, there is no way to undo the deactivation.
- Update a user's personal information such as their name, email address, phone number, or occupation.
- Update the accounts that a user has access to.
- Update some of the advanced settings for a user; this is where you'd change a user's base role so for example, if you wanted to change a user from a Standard User to a Supervisor due to creating rules for the account or group, this is where the change takes place. Also give a user access to maintain Customer Item Numbers, GL Codes, Approve to Pay, or Online Bill Pay, or request access to Insight Reporting.



## Administration Dashboard

### How to Create a Rule

**Note: Before creating a rule, a Supervisor should be selected or else the rule will break and orders will sit open on the account.**

#### Create Rule

**i** Need a rule created that doesn't exist here or have questions about creating your rule? Please contact our Help Desk at 1-800-216-5954 or [HelpDesk@medline.com](mailto:HelpDesk@medline.com)

Organization: **Medline Demo Account**

Rule Type: Order Approval

Rule Template: **A** Review all orders  
Review orders with Non-Formulary Items  
Review all orders when the total exceeds threshold  
Review all orders when the total is under threshold  
Review all orders with Material

Condition: **B** **This template does not contain any conditions**

Rule Message: **C**  Use my custom message  
All orders must be submitted for review

Account Access List: **D**  Copy all accounts within this organization that I currently have access to  
 Select accounts in organization [Select](#)

- Choose a rule from the list of our most common rules. If you need help creating a rule or do not see a rule you'd like to possibly put in place, contact the helpdesk for further assistance.
- The condition is only applicable to those rules that have certain criteria such as a review all orders exceeding a certain threshold.
- Uses the systems generated messaging or create your own message for the rule.
- Select specific accounts to have the rule applied to on the blue Select option. Or give users access to all accounts that are part of the Org.



## Administration Dashboard

### How to Search Rules

**Search Rules**

Search For

Include Inherited Rules

Account Access List:

Any Accounts within Organization

Select accounts in organization [Select](#)

Callouts: A (Search For), B (Include Inherited Rules), C (Account Access List)

- Search for rules by either Rule ID or Rule Message.
- Search for rules that are inherited by the Organization, this is set as a default. To search for rules that are not inherited, uncheck the box.
- Search for rules that are in the Organization or select individual accounts by clicking on the blue Select link.

**Search Rules**

Search For

Include Inherited Rules

Account Access List:

Any Accounts within Organization

Select accounts in organization [Select](#)

✓ Your search has returned the following 5 records

Showing 1 - 5 of 5 Results

Rule ID	Rule Message	Account	Inherited	Date Modified
38300002	All orders must be submitted for review	Inherit from Org		10/25/2017 12:27 PM
36000002	Review Orders containing non-Formulary items	Inherit from Org		09/15/2017 12:27 PM

Callouts: A (Export All Rules), B (Showing 1 - 5 of 5 Results), C (Rule ID)

- Once the search has been executed and the search results have been displayed, be able to export the list of rules into an excel file using this feature.
- Review the different information per rule such as rule type, accounts the rules are tied to, or date modified.
- Click on the rule to change view and/or change any of the rule's information.