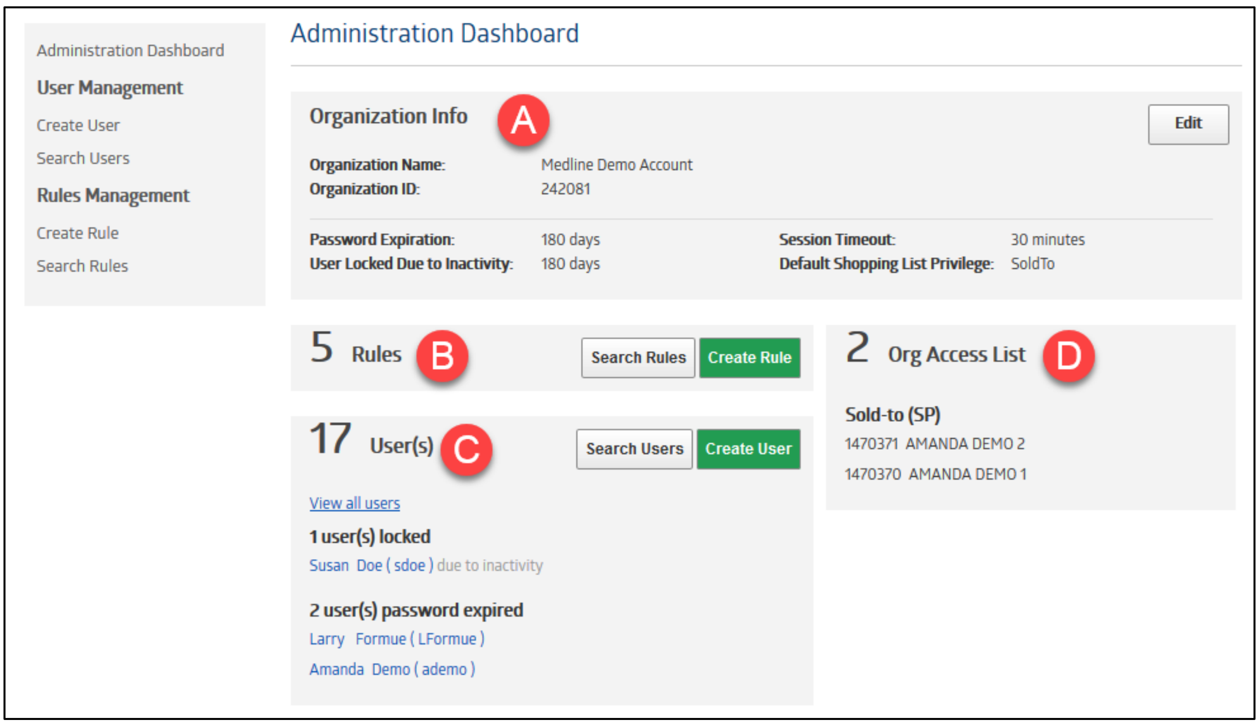
Administration Dashboard

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.

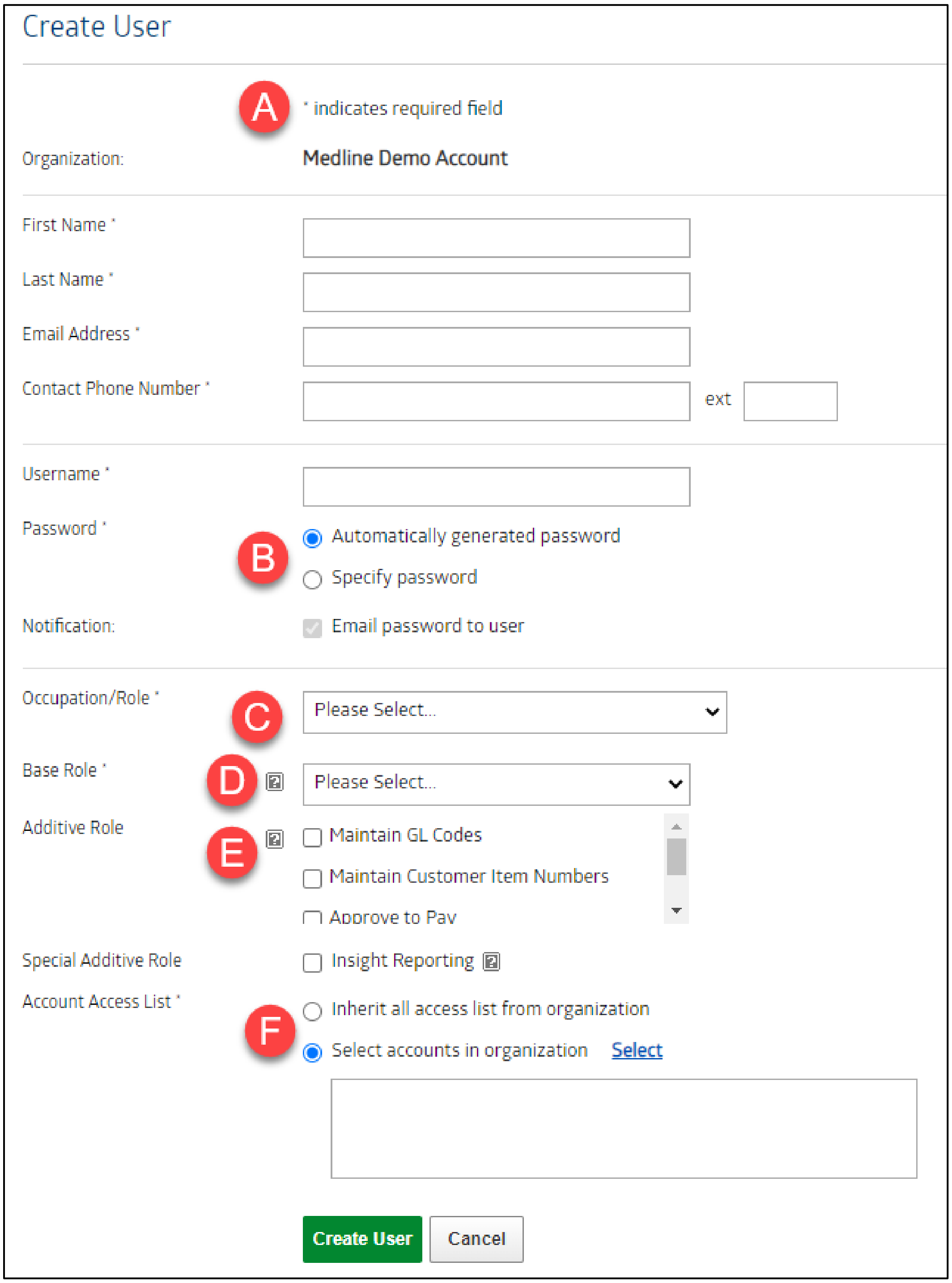
Please note that only 1 user should have this added to their profile per Organization.

Administration Dashboard Home



a. Displays general settings for the Organization. Edit these options by clicking on the Edit button.
b. 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.
c. 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.
d. Shows all accounts and groups that are part of the Org.

How to Create User


Create User

A * indicates required field

Organization: Medline Demo Account

First Name *

Last Name *

Email Address *

Contact Phone Number * ext

Username *

Password * B Automatically generated password

Specify password

Notification: Email password to user

Occupation/Role * C Please Select...

Base Role * D Please Select...

Additive Role E Maintain GL Codes

Maintain Customer Item Numbers

Approve to Pay

Special Additive Role Insight Reporting

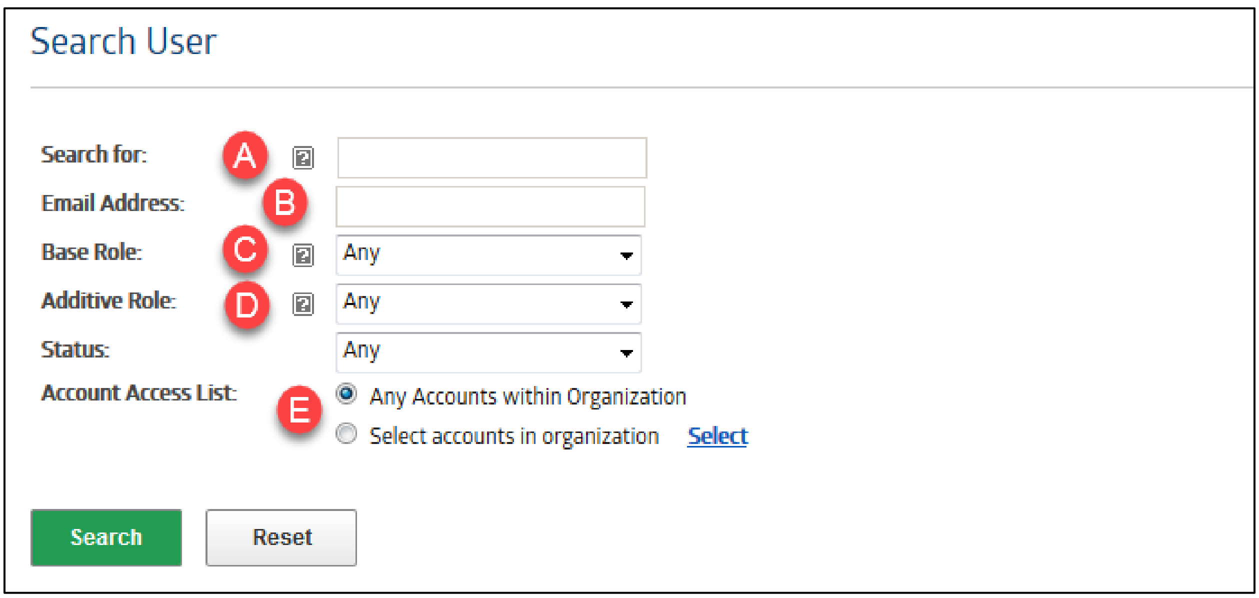
Account Access List * F Inherit all access list from organization

Select accounts in organization Select

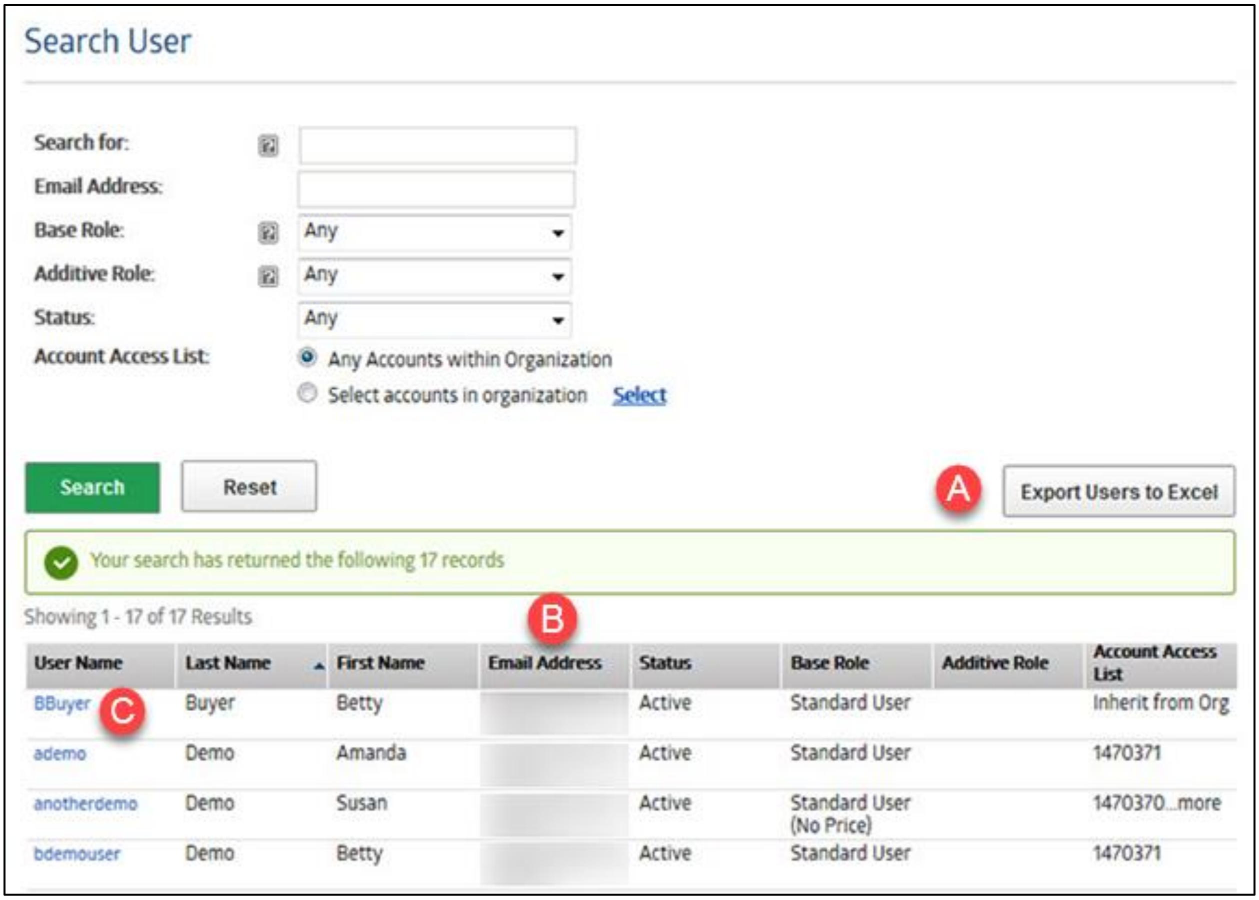
Create User Cancel

a. All fields that have the asterisk are required fields when creating a new user.
b. 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.
c. Choose the users business occupation/role from the dropdown.
d. Choose from multiple options, hover over the gray ”?” to get a detailed explanation of each role.
e. 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.
f. 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

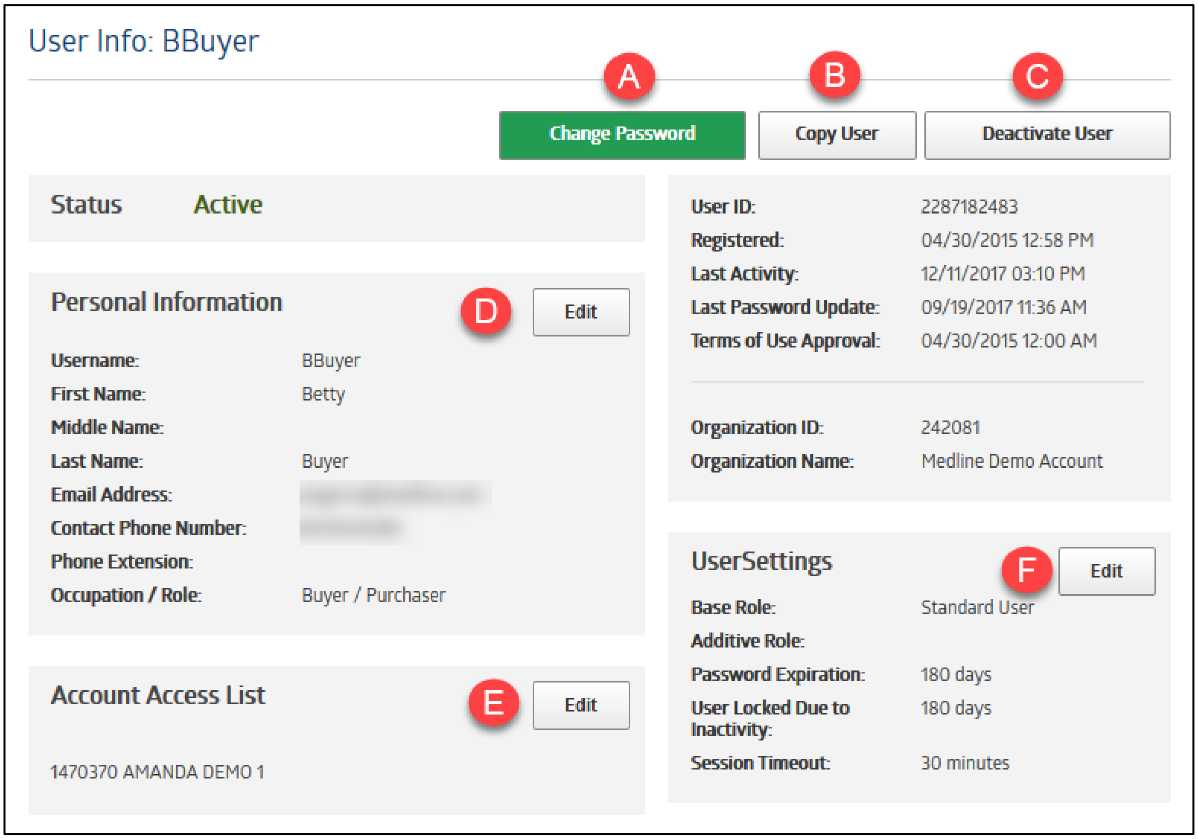


a. Search for users by either their first or last name. If this field is left blank when performing a search, all users will be listed dependent on the rest of the criteria selected.
b. Search by a specific email address.
c. Search for a specific type of user by clicking on the dropdown to make your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



a. 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.
b. 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.
c. Click on the username to change view and/or change any of the user's information.

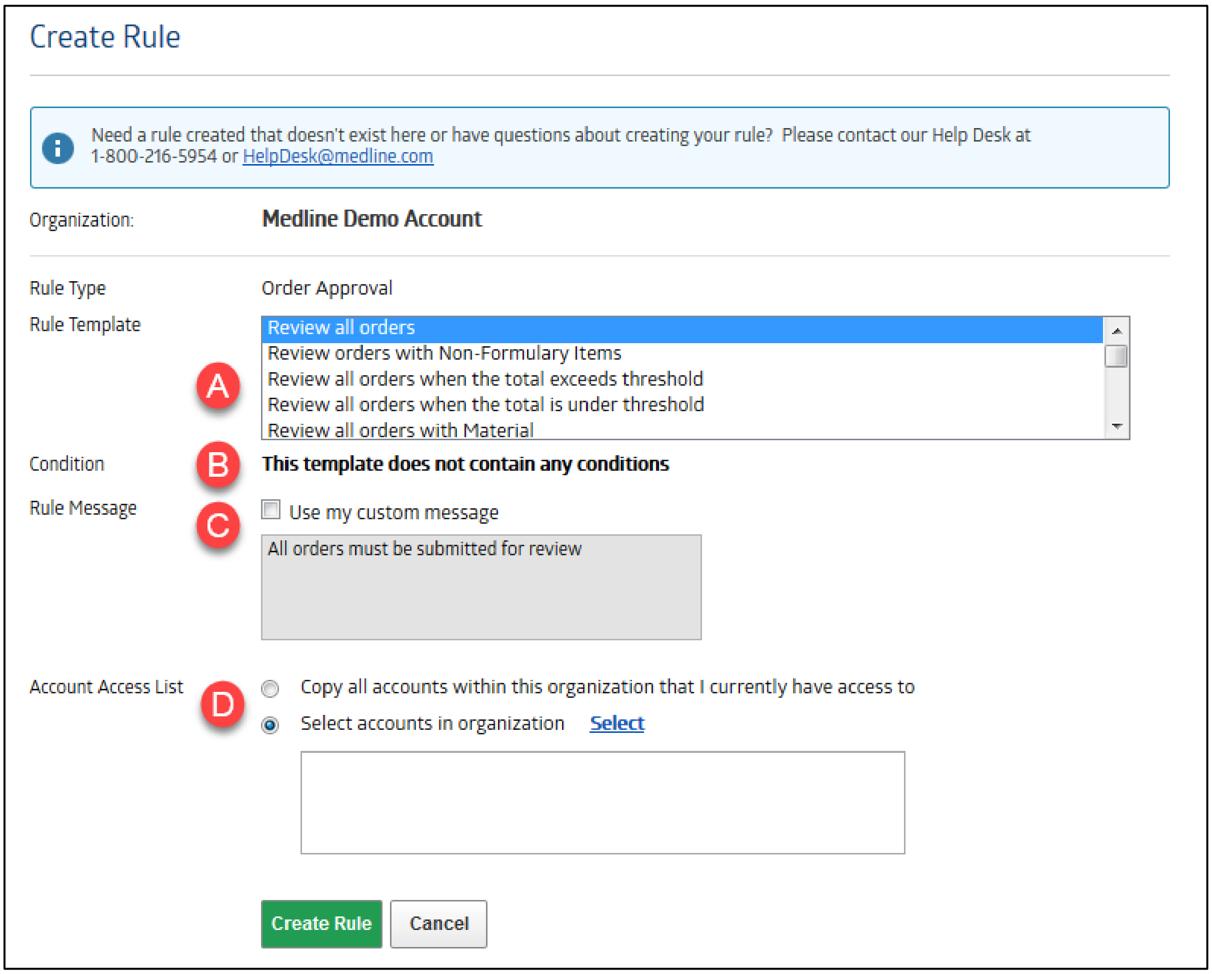
How to Edit Users



a. 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.
b. 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.
c. 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.
d. Update a user's personal information such as their name, email address, phone number, or occupation.
e. Update the accounts that a user has access to.
f. 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.

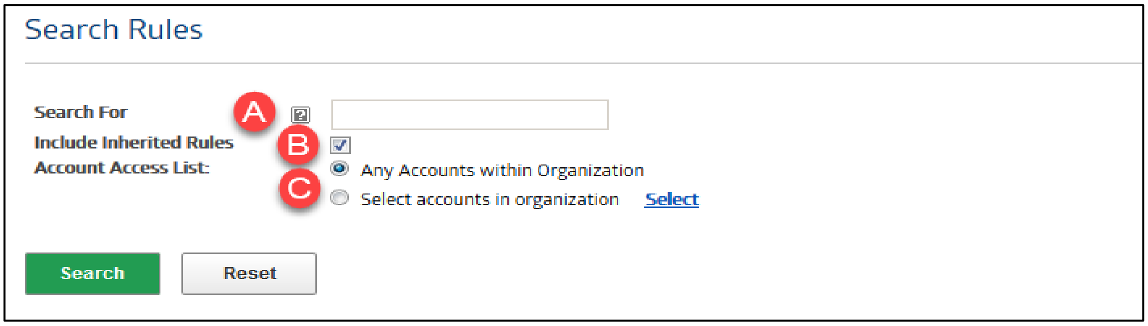
How to Create a Rule

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

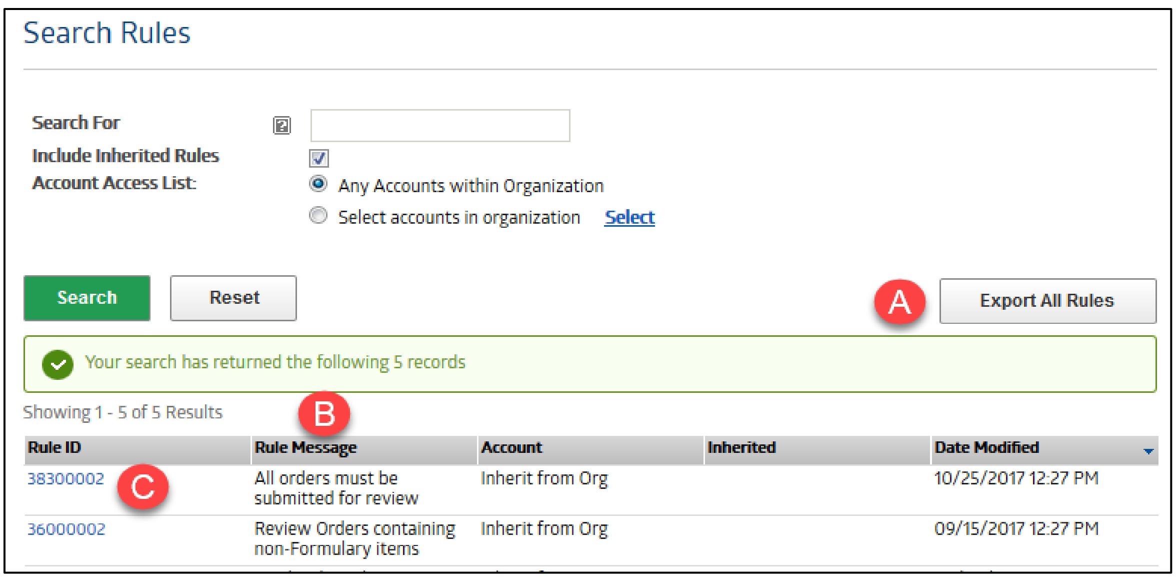


a. Choose a rule from the list of our most common rules. If you need help creating a rule or do not see a rule you'd like to possibly put in place, contact the helpdesk for further assistance.
b. The condition is only applicable to those rules that have certain criteria such as a review all orders exceeding a certain threshold.
c. Uses the systems generated messaging or create your own message for the rule.
d. 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.

How to Search Rules



a. Search for rules by either Rule ID or Rule Message.
b. 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.
c. Search for rules that are in the Organization or select individual accounts by clicking on the blue Select link.



a. 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.
b. Review the different information per rule such as rule type, accounts the rules are tied to, or date modified.
c. Click on the rule to change view and/or change any of the rule's information.