# **Explorer Online Admin Guide**

### Overview

This article will cover the basic functionality of using the admin features in Explorer Online. If you have any questions or require any further information, please contact the Helpdesk on (07) 5456 6000.

## Manage Users

The Manage Users feature allows you to add, remove and update your Explorer Online users. You can access the Manage Users feature via the Tools navigation menu.

💋 Ex	plorer Online	Dashboai	rd Patients 🕶	Documents -	Reports 👻	Tools 👻	Help 👻
⊬	Patients		Manage Users			🙁 Provid	er Lookup
🗅 Loaded Patients		0				음 Manag	je Users
Pro Desendenced		-	Users				😫 Add User

#### Creating a new user



You can clone an existing user which will copy their permissions by hovering over the user in the user list and clicking the clone icon.

HL7POSTER	Add new user with this user's permissions
JASON	© ×

To create a new user simply hit the Add User button in the header of the users list panel.

Users	<mark>≗</mark> + Add User
$\bigtriangledown$ Filter by name or provider number	

After clicking the Add User button you can then fill out the add user form to the right.

	Details	Тір
Username	The usernam e they will use to log in with.	Avoid long usernames as well as spaces or special characters.
Password	The passwor d they will use to log in with.	You can generate a random password by clicking the <b>Generate Password</b> button.
Require Password Change	Optional This will force the user to set their own passwor d when they first login.	
Providers	Click the Add button to add a provider.	If the provider you wish to add is not registered with Medical-Objects you can add an unlisted provider by clicking the drop down arrow on the <b>Add</b> button and selecting <b>Add Unlisted</b> .

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Permissions	The permissi ons the user will have.	Suggested defaults <ul> <li>View own results</li> <li>View own restricted results</li> <li>Mark results as reviewed</li> </ul> <li>Suggested permissions for granting user access to the Requested Charts folder <ul> <li>View All Unrestricted Results</li> <li>View Own Results</li> </ul> </li>	
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Once finished simply click the **Save** button.



#### Delete a user

To delete an existing user, simply select the user in the user list and then on the right hand side click on the **Delete User** button.

🗱 Generate Password	<mark>≗</mark> × Delete User ✓ Save Changes
CONFIRM PASSWORD	Require Password Change

#### Updating a user

To update an existing user, select the user from the users list. Once selected the users details will be displayed in the user details section to the right.

Once you've made your changes simply click the Save Changes button.



# Setting Up Each User Account for Email Notifications

Note:

If the user has logged in using a client certificate they will have access to configure every user's notification settings, otherwise they will only be able to configure their own.

- 1. Select the user account in the top right corner.
- 2. Click User Settings.



3. Click Document Notifications and select Add.

User Settings						
9 Connection					5	icit Remove Add
Document Defaults	Enabled	Username	Email	Interval	Last Sent	Count
🖵 Interface						
Document Notifications						
Reset all to Default						Cancel Save

4. Enter the email address they want to receive the notifications to.

Add Document Notification User				
USERNAME				
EMAIL	Ŧ			
INTERVAL	<b>0</b>			
once a day 🔻	⊘ Enabled			
	Cancel Confirm			

- Set up the interval of how often they want to receive a email notification it's recommend once a hour or every 4 hours so they aren't getting spammed with emails and select Confirm.
   Then Save the Document Notifications configuration.