idMANAGE

user management made easy

Training Manual

TABLE OF CONTENTS

Getting Started

This is a sample tutorial designed to give you a good understanding of how *id*MANAGE™ functions. During the four sample lessons, you will learn how to:

- Use the powerful Search Screens to locate and report information
- Use the HR Sync to populate your information for the first time
- Create Applications
- Create Profiles – define what your users are authorized to access.
- Create accounts (individual and batch mode)

Conventions Used in this Document

This	Represents
1. 2. 3.	Major Steps or high-level instructions.
☐ Text	Detailed instructions under a major step that you need to follow.
Press [Button]	Instructions to click a button the screen.
Bolded Italicized Text	When you need to type information
Bolded Text	Important Information
Note:	Additional information about the topic or procedures.
Tip:	Helpful information about a topic or procedure.

Lesson One – Overview

Signing into idMANAGE™

1. Launch *id*MANAGE™. The login screen will appear.

2. Enter your username and password:
   Your username is **Demo**
   Your password is also **Demo**

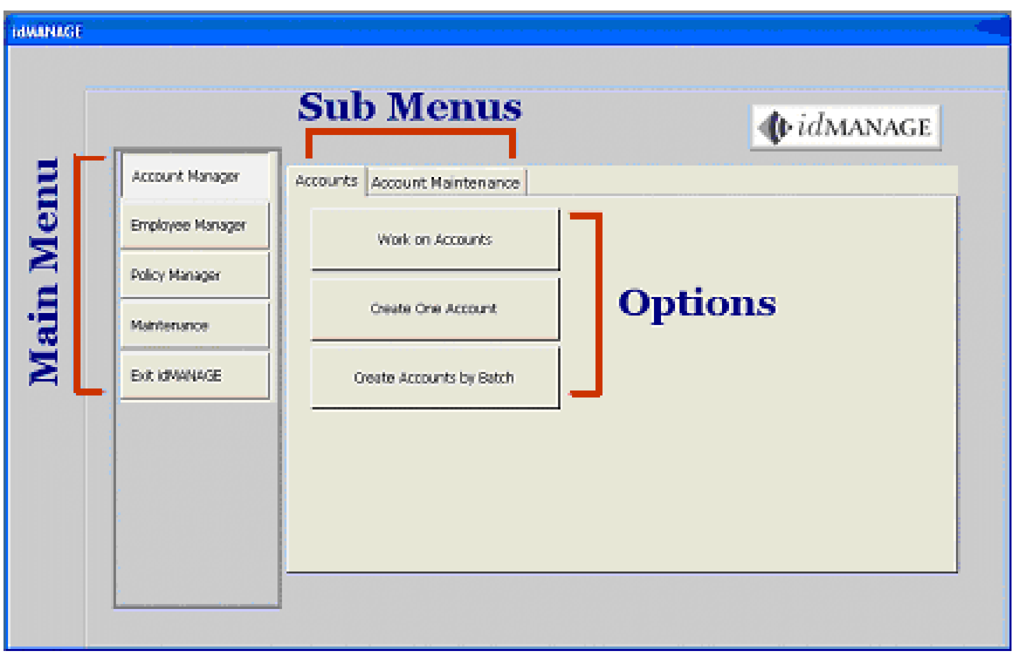
   Click **[OK]**

   The Main Screen will display.

Layout of the Main Screen.

There are three parts to the main screen:

- Main Menu– The main menu is displayed as vertical buttons on the left side of the screen. You will access modules from the Main Menu
- Sub Menus – Sub Menus are displayed as horizontal tabs across the top
- Options – Options are buttons displayed on each sub menu.



Lesson Two - Search Screens

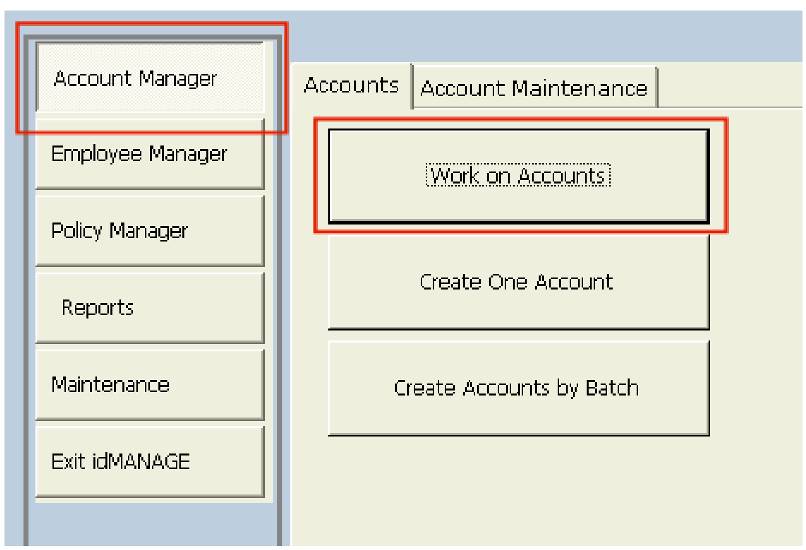
Before we get started, it is important for you to know how to use the Search Screens. Search Screens are used throughout *id*MANAGE™. They are powerful forms that allow you to search, create, count, report, and work on existing information.

For this exercise, we will use the Search Screen in "Work on Accounts" but the principals learned follow all of the Search Screens.

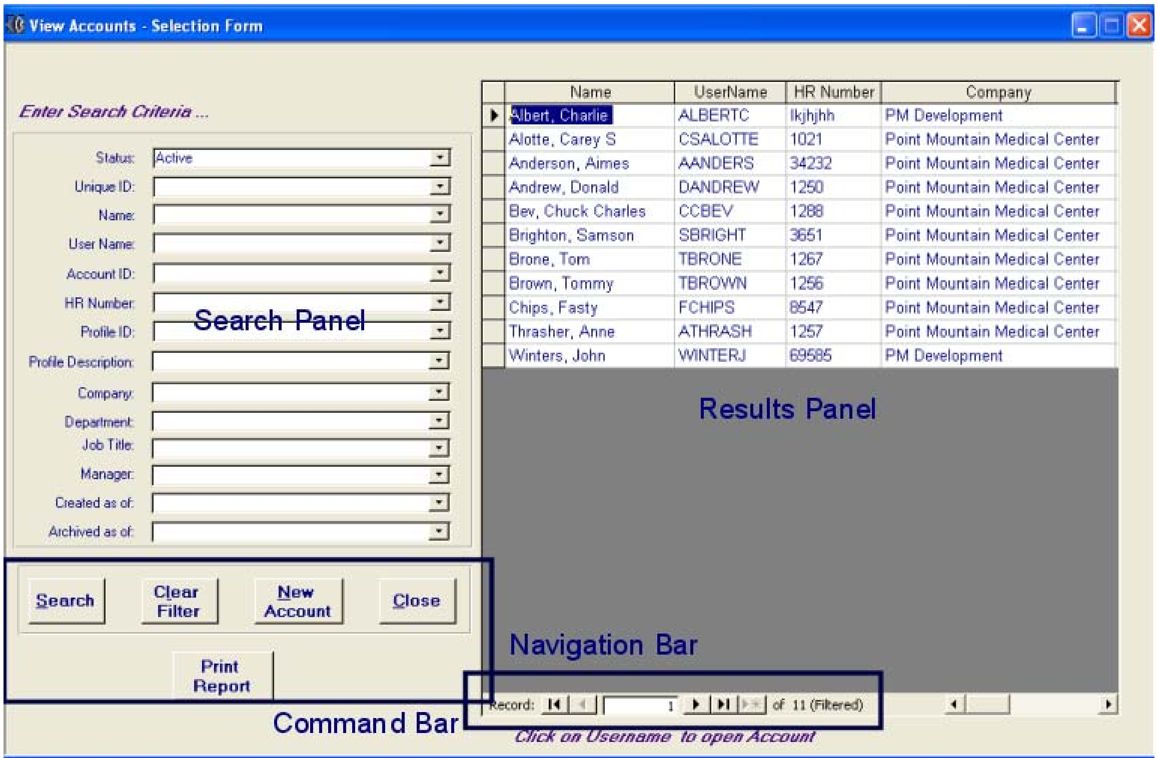
NOTE: The pictures in this section show more accounts than you will actually have in your demo application (at this time) so that you can get a better understanding of how the Search Screens work. You will begin with two accounts but this number will increase as you complete the lessons in this tutorial.

1. Open the View Accounts Search Screen:

☐ From the Main Menu, click **[Account Manager]**. The Account Manager's submenus appear. There are two tabs: Accounts and Accounts Maintenance.



☐ On the Accounts tab, click [**Work on Accounts]**. The "View Accounts Selection Form" is displayed.



Selection Forms are divided into two panels. The left panel contains your search criteria and the right panel contains your search results.

Search for Existing Accounts

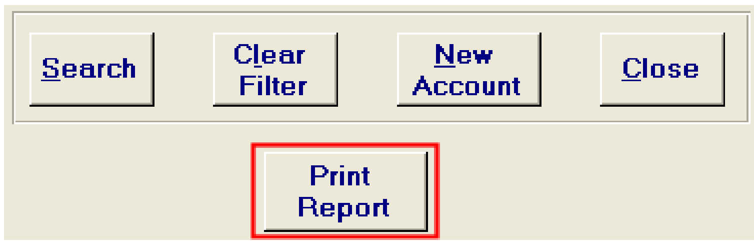
To search for information, enter your search criteria in the left panel and click [**Search**]. Your results will be displayed in the right panel.

To enter the search criteria.

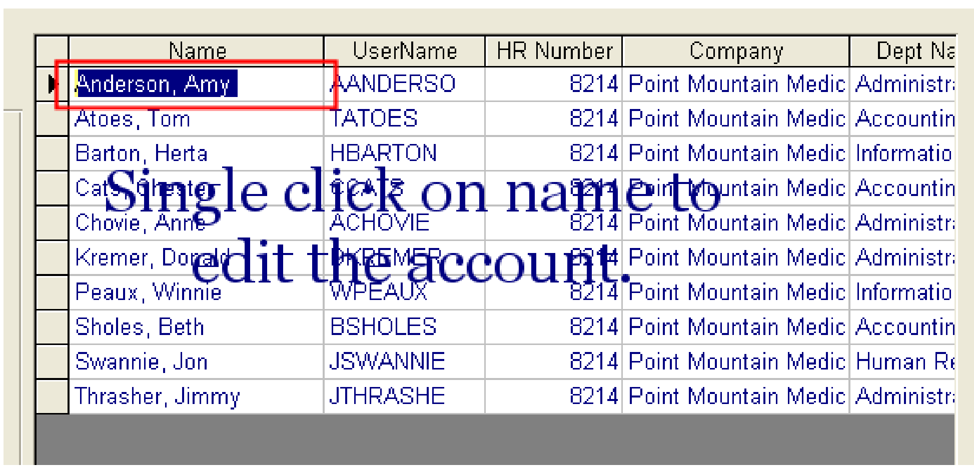
☐ Click in the field that you want to search on. Select your criteria from the drop down box.

☐ Click [**Search]**. Your results will show in the right panel. You will notice that there is a record count at the bottom of account listing. This is a very quick and easy way to see how many accounts meet your selection criteria (i.e. how many active accounts are tied to a company.

☐ You can print a report based on the records you selected. This is very convenient if you need to get a listing of users for a particular profile, company, job title, etc. The print button is located on the command bar.



☐ To open a record, single click on the first field of the record that you want to view.



The user's account record will be displayed. We will cover this screen in Lesson 6.

2. Click [**Close**] to close this page and return to the main menu.

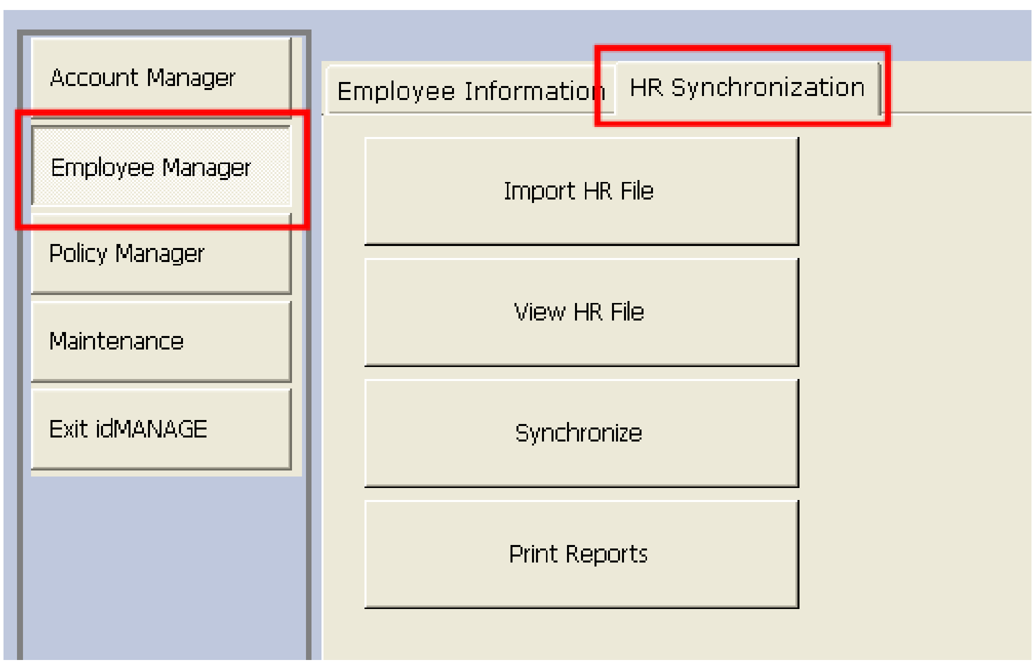
Lesson Three – HR Synchronization

HR Synchronization is a very powerful tool that allows you to stay on top of your company's employee changes. It identifies new hires, transfers, terminations, name changes, new departments, new job titles, and new positions. We also use it to populate your employee information for the first time.

In this lesson, you will learn how to use HR Sync to populate *id*MANAGE™ with your employee information.

1. The first task you will perform is to import the HR Sync file.

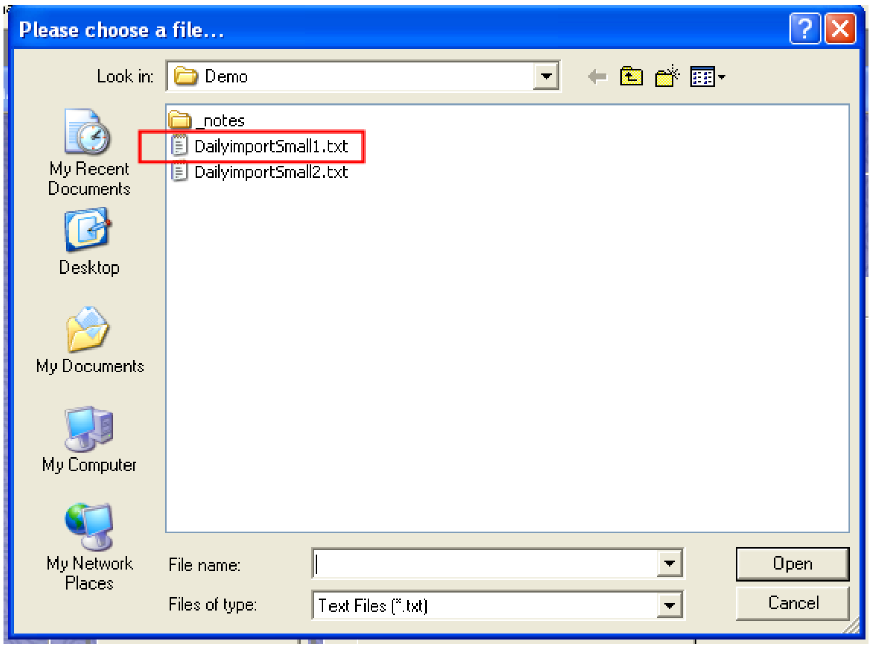
☐ From the Main Menu, click the [**Employee Manager]** button. The Employee Manager submenus appear.



☐ Click on the [**HR Synchronization]** tab.

☐ Click [**Import HR File]** button. You will be asked if you want to import the new file.

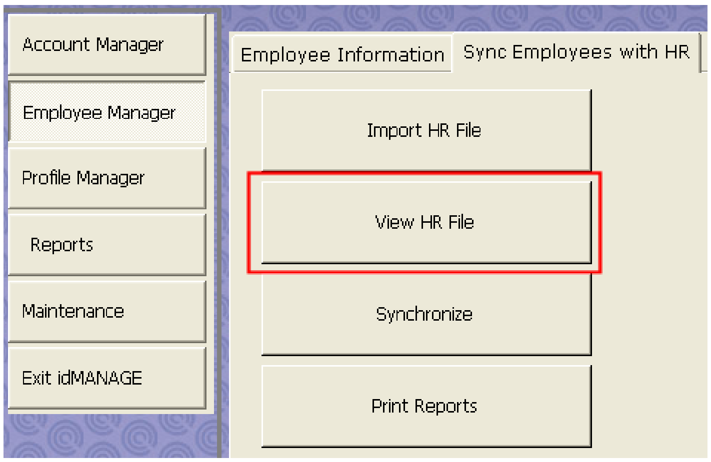
☐ Click [**Yes**]. A window will appear asking you to locate and select the file.
Browse to c:\program files\idMANAGE directory.
Select **dailyimportSmall1.txt** file.



The file will import. A message will be displayed once complete.

2. Verify that the import was successful. You should always verify the file imported correctly before beginning the Synchronization process. This is especially important when you are first starting to use idMANAGE™ so you can verify that your import table is correct.

☐ Click [**View HR File]** button. Your import file will be displayed in a spreadsheet format.



When viewing the HR File, you want to make sure that the columns match the headings and that the data imported correctly. If there is a problem, you can correct the import file and then re-import the file.

CompanyID	DIV	UniqueID	HRNumber	DOB	Dept	DeptName	JobNumber	JobTitle
1	1	123456789	1276	6/21/1954	6145	Accounting	96581	Manager - Accounting
1	1	12452512	9100	5/27/1958	6417	Nutritional S	32152	Cook
1	1	124854532	1291	7/25/1975	6145	Accounting	96581	Accountant
1	2	125120231	32512	2/5/1958	6145	Accounting	65475	Business Analyst

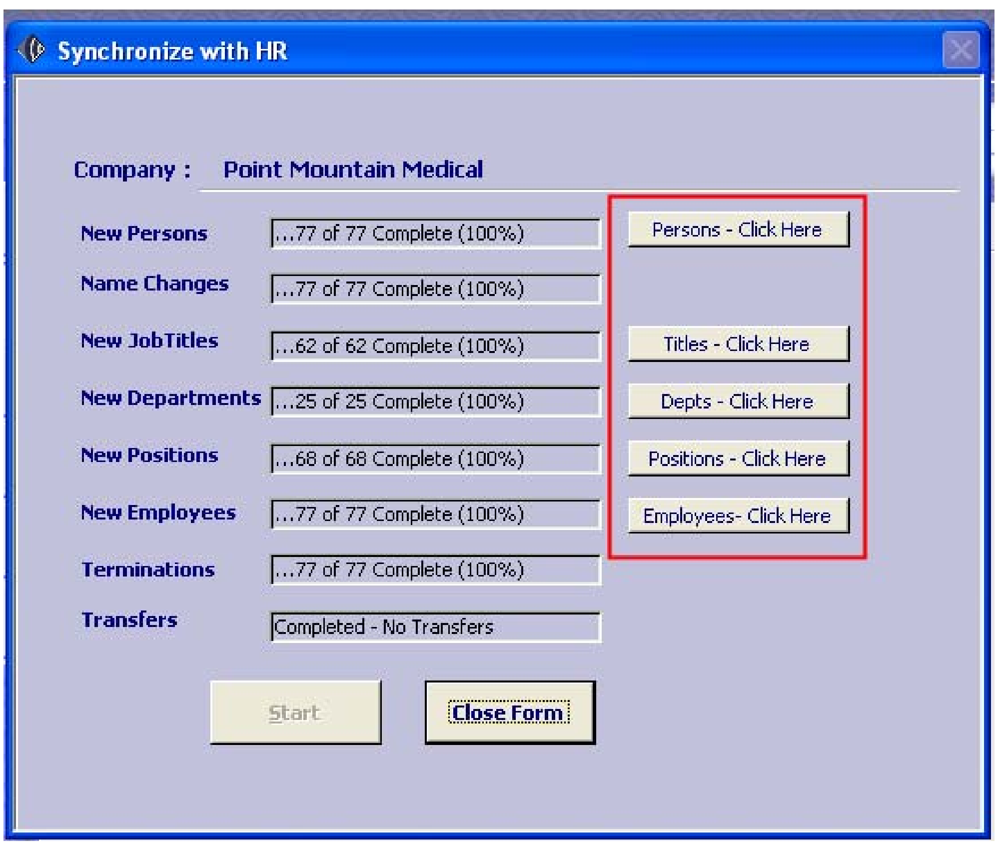
3. You are now ready to synchronize idMANAGE™ with your HR file.

☐ Click [**Synchronize]** button. The "Synchronize with HR" form appears. Your demo company name **Point Mountain Medical Center** will be displayed at the top of the form.

idMANAGE™ matches based on the [CompanyID] in your import file and the [Company ID] in your company form.

☐ Click [**Start]** button to begin the process. The progress will be displayed on the form as it is processing. The results will be displayed once the process is complete. Buttons will be displayed next to each item that has new entries.

4. When the synchronization is finished, a button will appear next to each item when new information has been added. Click the button(s) to view/print the reports.



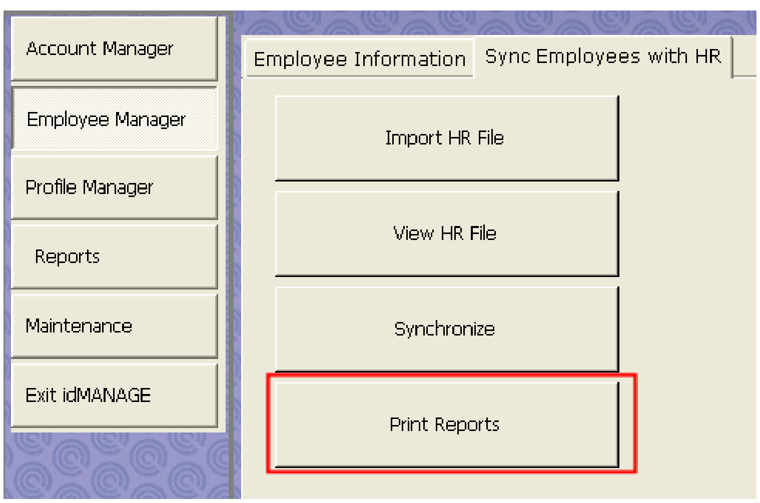
For this exercise, we have five reports:

1. Persons – Lists the new people entering your company who may/may not need access.
2. Titles – Lists any new job titles.
3. Departments – Lists any new departments added in your HR system.
4. Positions – This is an important report. It lists any new positions added. You should contact the manager of the position to determine if a profile can be created for the new position.
5. Employees – Lists the new employees and what position.

Other reports that will appear when there is information include:

1. Name Changes – Lists any name changes so that you can change the name in your systems.
2. Terminations – Lists the employees who no longer work for your company. You will use this report to remove users from your systems.
3. Transfers - Lists any persons who have transferred in your company from one position to another. You will use this report to add or remove access based on the employee's new position.

5. Click [**Close Form**] when finished. Do not worry if you fail to print a report, you can click on "Print Reports" to print today's reports as well as any past reports.

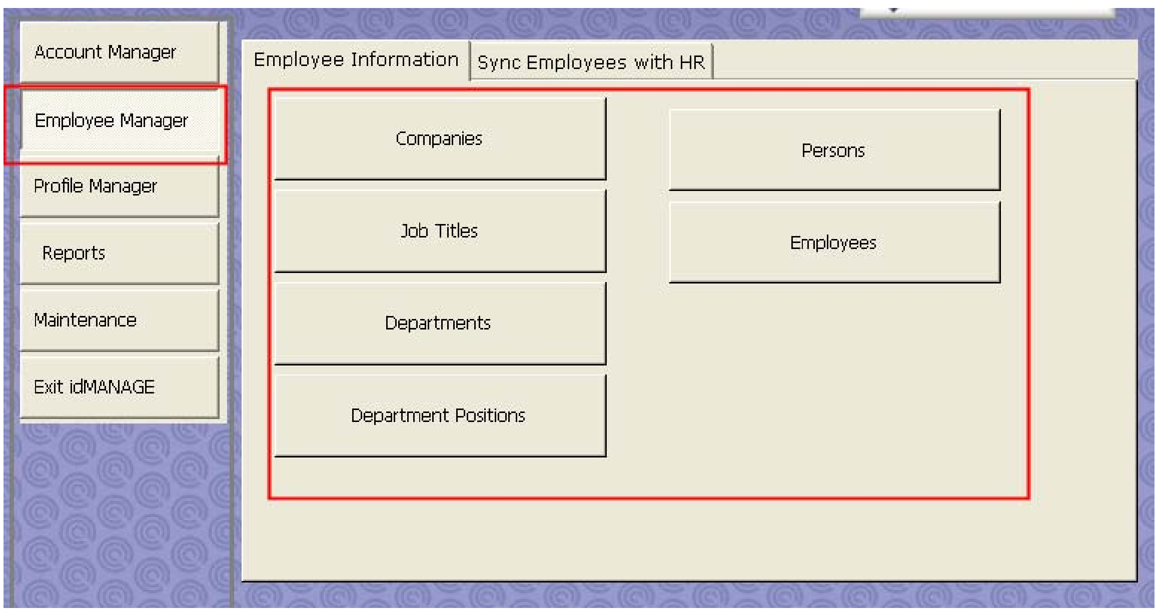


6. Please spend some time reviewing the new information that was added to *id*MANAGE™. I recommend that you look at the following screens:

☐ Click **[Employee Manager] / [Employee Information]** to access the employee information.

☐ Using the principles you learned in Lesson Two, click on each of the buttons to view the new information:

- Companies
- Job Titles
- Departments
- Department Positions
- Persons
- Employees



End of Lesson Three

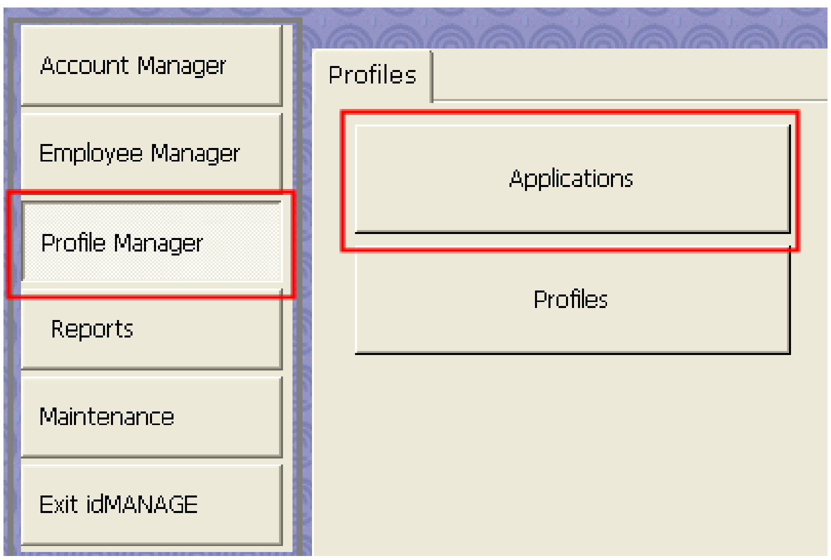
Lesson Four – Build Your Applications

Applications allow you to inventory your applications, application ownership, and the different access levels (a.k.a. positions) for an application. This information helps you to keep track of who is responsible for the application and who can approve access to the application.

Build Your Applications

1. Open the Application Selection form.

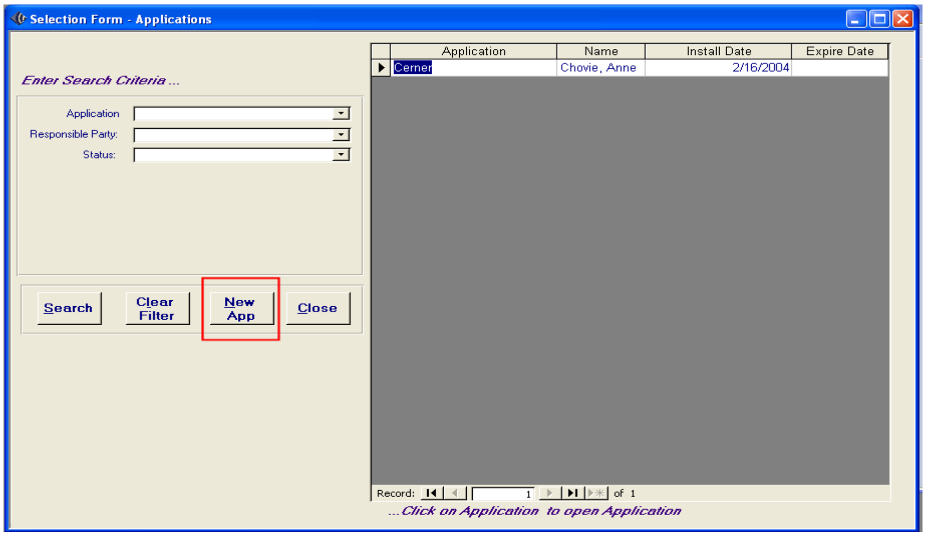
☐ From the Main Menu, click **[Profile Manager]** button to display the submenus. The Profiles tab appears.



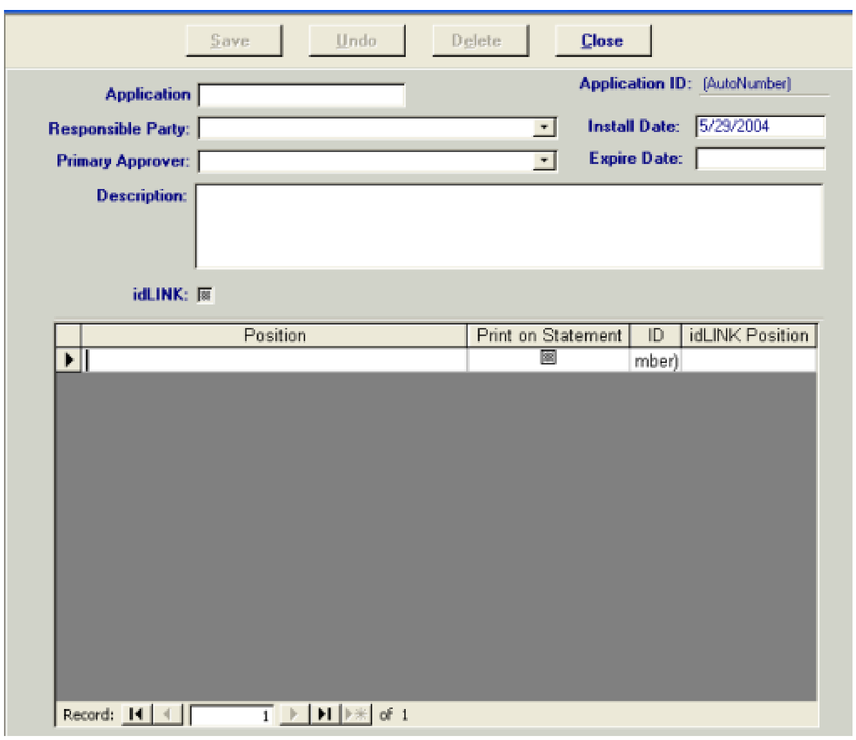
☐ Click [**Applications]** button. The Application Selection form appears. From this screen, you can either 1) edit an existing application by clicking on the application name or 2) create a new application. In this exercise, we will create five new applications.

1. Create New Application

☐ Click [**New App]** button.



The **Applications form** appears.



3. Fill in the following fields:

   Application - This is the name of the application. This name will appear in your accounts, policies, and reports.

   Type ***Intranet***

   Responsible Party- This is the person who has ultimate responsibility for this application. This person could also oversee the daily operation of the application to ensure that is being used correctly.

   From the drop down box, select ***Asforth, Terri***.

   Primary Approver - This person has the authority to approve who has access to the application. This person could be the same as the Responsible Party.

   From the drop down box, select ***Ashforth, Terri***

   Description - Enter a brief description of the product. It is recommended that you include the function and purpose the system.

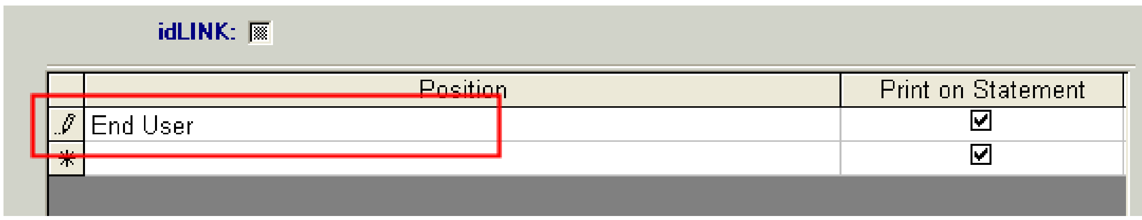
   Type ***This is the company's Intranet system. All employees are authorized to have access to this system***.

   Install Date - This is the date the application became active. It defaults to the current date but you can change this if you need to by typing over it. This field is informational only. It keeps track of when the application was implemented.

   idLINK –If there is a link to this application, this section will be completed by your System Administrator. Checks next to Add, Modify, Delete, and Audit identify which of the link functions are available.

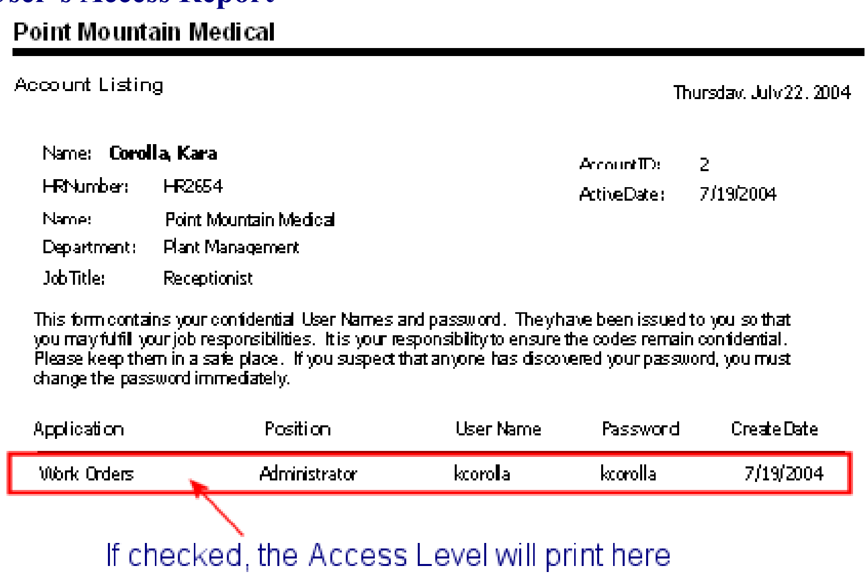
   idLINK is not active in the demo so we will not be using it.

Position - Enter in the different access levels for the application. Access levels can be referred to as positions, roles, groups, or security classes. These are the different access levels that you can assign a user in the application. Examples for an accounting system may include Accountant, AP Clerk, AR Clerk, Cashier, etc…



1. In the first row of the positions section type: *End User*
2. Press [TAB] to move to the next field "Print on Statement".
3. Click the check box to indicate "Yes". This will allow the application to print on the user's access report. There may be some applications and/or positions that are for your information only and you do not want them to print on the user's access report.

User's Access Report


Point Mountain Medical

Account Listing

Thursday, July 22, 2004

Name: **Corolla, Kara**
HRNumber: HR2654
Name: Point Mountain Medical
Department: Plant Management
JobTitle: Receptionist

AccountID: 2
ActiveDate: 7/19/2004

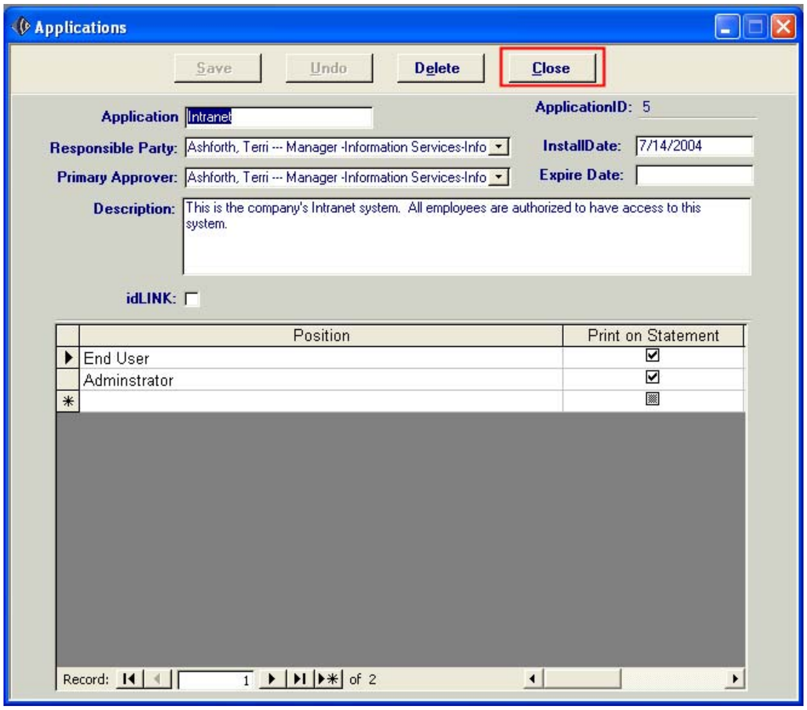
This form contains your confidential User Names and password. They have been issued to you so that you may fulfil your job responsibilities. It is your responsibility to ensure the codes remain confidential. Please keep them in a safe place. If you suspect that anyone has discovered your password, you must change the password immediately.

Application	Position	User Name	Password	Create Date
Work Orders	Administrator	kcorolla	kcorolla	7/19/2004

Enter the next position:

1. In the next available row, type: ***Administrator***
2. The next column "Print on Statement", defaults to "Yes" which will allow the Access Level to print on the User's Access Report. Sometimes you want to document access to a resource but do not want to print it on the User's report. In this case, you would uncheck this box.

Your application should look like this picture:



Click [**Close**] when you are done.

Repeat this exercise the next four applications

1. Application Name: ***Risk Master***
   Responsible Party: ***Ducky, Darryl***
   Primary Approver: ***Ducky, Darryl***
   Description: ***This is the company's risk management system to track claims.***
   Positions: ***Risk Adjustor***
   View Only
   Administrator

2. Application Name***: Employee Self Service***
   Responsible Party: ***Chips, Fasty***
   Primary Approver: ***Dangles, Chuck***
   Description: ***This system allows employees to enroll in benefits, change employee information and to review accrued benefits. All employees are authorized to access this system***.
   Positions: End User
   Payroll Clerk
   HR Manager
   Administrator

3. Application Name***:*** ***NT Account***
   Responsible Party: ***Ahsforth, Terri***
   Primary Approver: ***Ashforth, Terri***
   Description: ***Company's Domain System.***
   Positions: End User
   NT Administrator

4. Application Name***:*** ***Email***
   Responsible Party: ***Ahsforth, Terri***
   Primary Approver: ***Ashforth, Terri***
   Description: ***Company's Email System.***
   Positions: End User
   Email Administrator

Click [**Close**] to close this page and return to the main menu.

End of Lesson Four

Lesson Five – Build Your Profiles

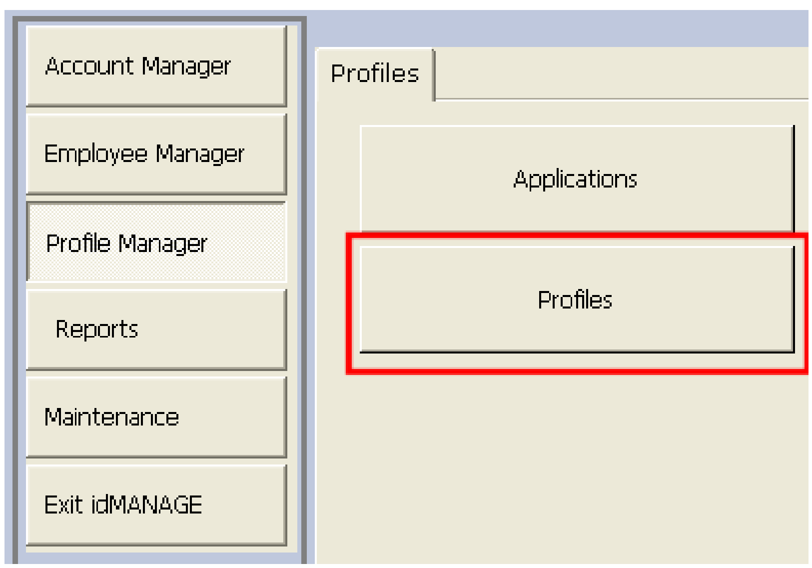
Profiles identify which applications and the access level that a job position should have access to. When a new account is created, it checks for an assigned profile. If a profile is found, *id*MANAGE™ will add all of the assigned applications and access level to the user's account.

For this exercise, we will two profiles. The first one is a **Default Profile** that will apply to **all** employees. All employees should have access to the applications listed in a default profile. We will also create a profile for our Vice Presidents.

Create a Default Profile

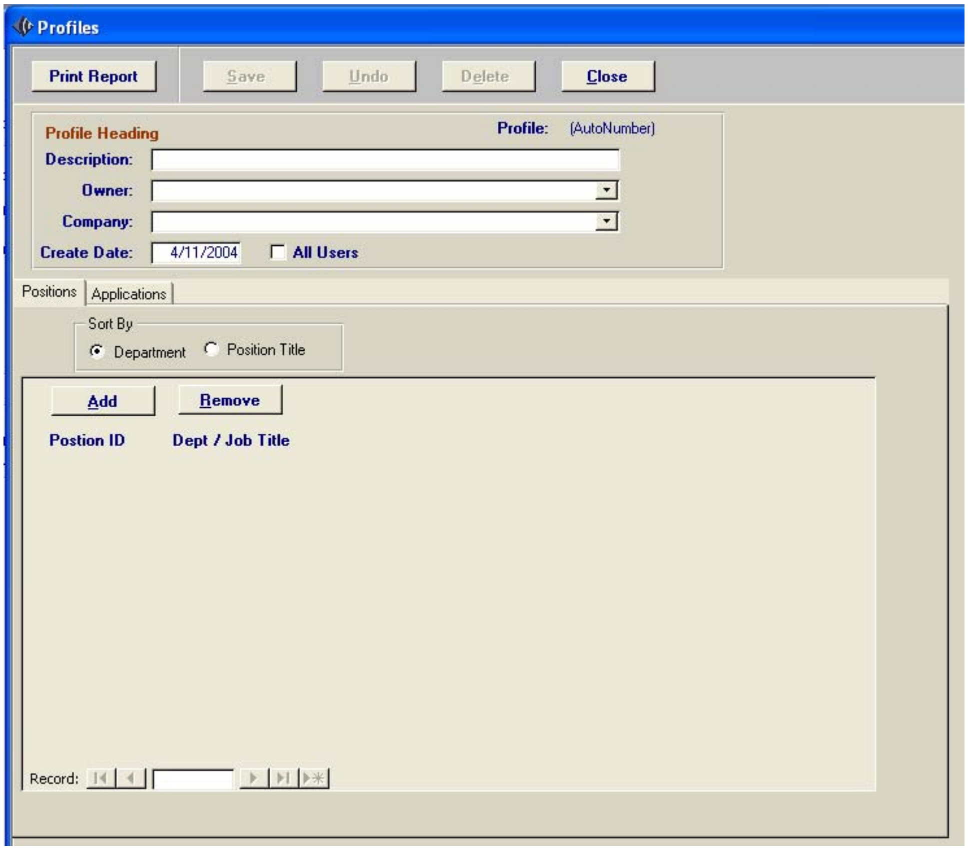
1. Create the Default Profile. Open the Profile form.

☐ Click [**Profile Manager]** Button on the Side bar Menu. The Profiles tab appears



☐ Click [**Profiles]** button. The Profile Selection screen appears. We will create a default profile that will apply to all employees that work for Point Mountain Medical.

☐ Click [**New Profile]** button. The Profile screen appears.



2. Fill in the profile information fields:

   Description - The description should be representative of the positions linked to this profile.

      Type ***Default Profile***

   Other examples include:

   - Lead Accountants
   - Office Manager - Rural Office
   - Administrative Assistants
   - Director - Business Office

   Company - This is the company that will use this profile. Only one company can be linked to a profile.

      From the drop down box, select the ***Point Mountain Medical.***

Owner - This person has the authority to make changes to this profile. It is usually the department manager or the person who requested that the profile be created. Select the owner's name from the drop down box.

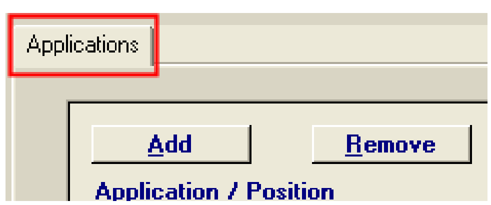
From the drop down box, select ***James, Kirk - Administration (Chief Executive Officer)***.

Create Date - The date defaults to the current date. We will keep this date.

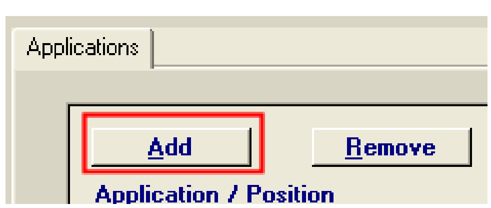
Click **Default Profile** check box. This will mark this as the company's default profile. Every user created for this company will be assigned the applications listed in this profile.

3. Add the applications that all of the company's employees are authorized to access.

☐ Since this is the default profile, only the **Applications** tab appears.

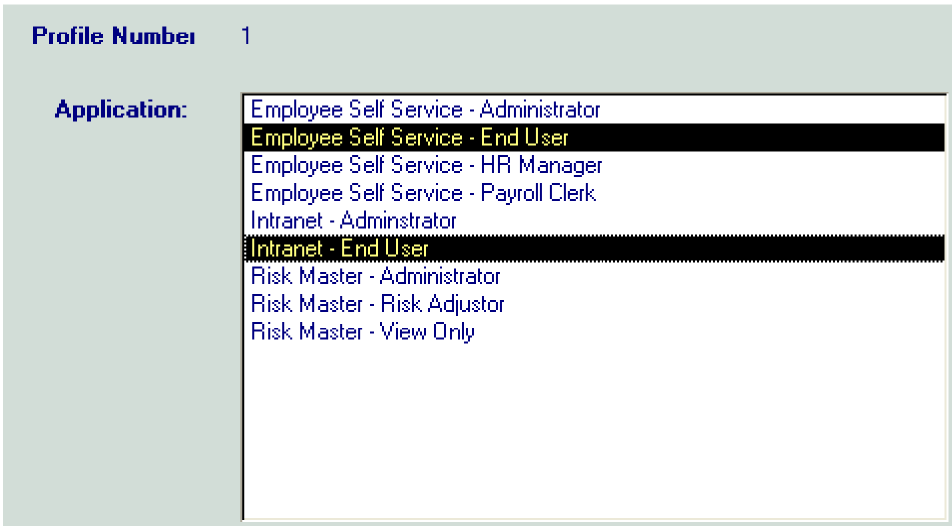


☐ Click [**Add]**. The "Add Applications" screen appears.



☐ **Select the Applications --** You can select one or more application by holding down the **[CTRL**] key to select multiple applications.

Select: ***Employee Self Service – End User***
Intranet – End User

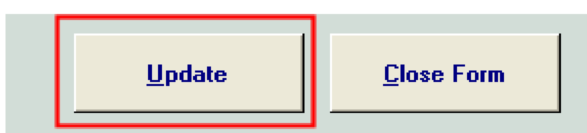


☐ **Would you like to update the users linked to this profile?** Select "Yes" if you want to add this profile to all users linked to the selected profile. Otherwise, you should select "No" and the users' account records will not be updated.

For this lesson, select ***No*** We do not have any accounts created yet.

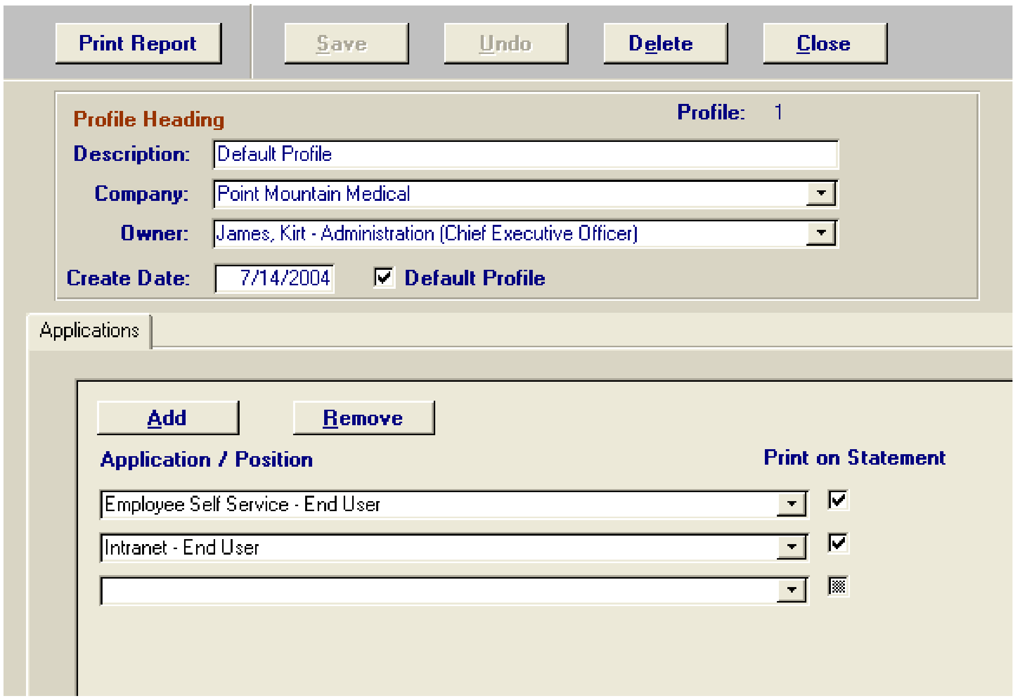
☐ **Print on Statement?** - Check this option if you want these applications to be listed on the User Access Report.

4. **Update the Profile**-- Click the **[Update]** Button to add the positions to the profile.



A message will be displayed when the update if finished.

Your screen should look like the following:



5. Click **[Close]** to close the form.

Create a Standard Profile

In this exercise, you will create a Profile for the Vice Presidents.

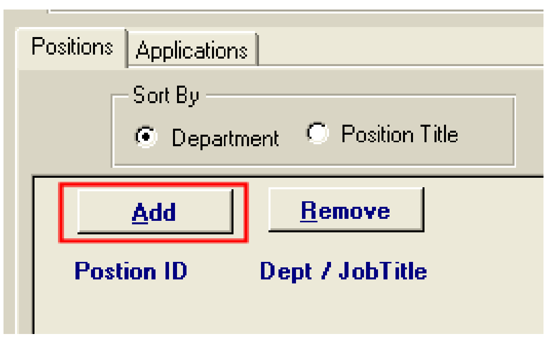
1. From the Profile Selection Screen, click [**New Profile]** button.
   The Profile screen appears.

   ☐ Fill in the following fields:

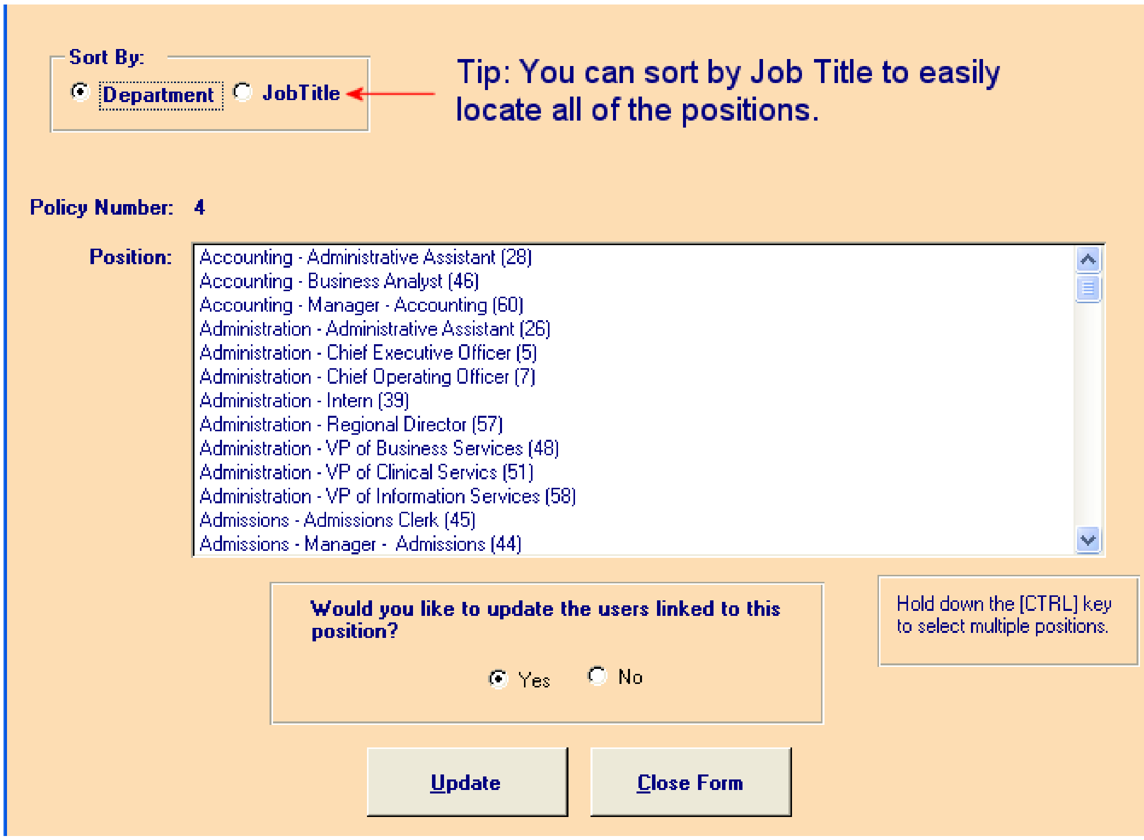
   Description: ***Vice Presidents***
   Company: ***Point Mountain Medical***
   Owner: ***James, Kirk- Administration (Chief Executive Officer)***

☐ Select the positions for this profile.

Click [Add].



The "Add a New Position" screen appears.

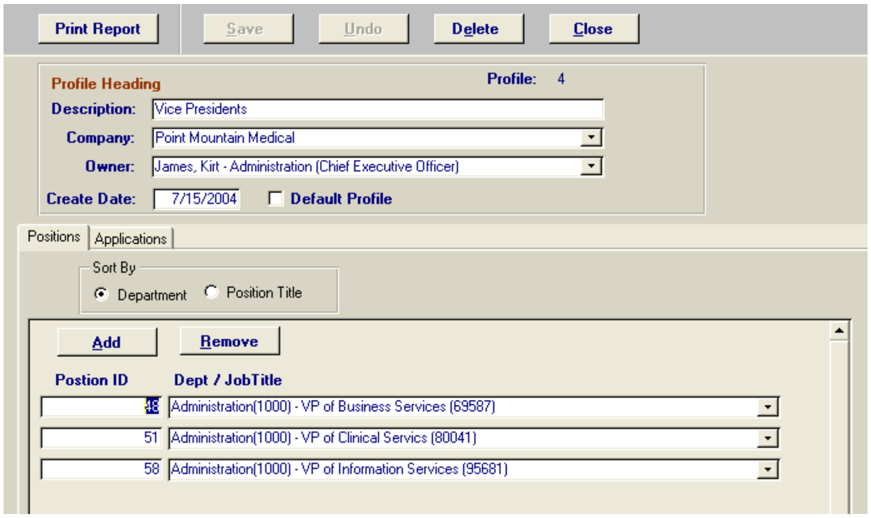


☐ **Select all of the Vice President Positions --** You can select one or more position by holding down the **[CTRL]** key to select multiple applications.

Select: ***Administration – VP of Business Services***
Administration – VP of Clinical Services
Administration – VP of Information Services

☐ Click [**Update**]

Your screen should look like the following:



4. Now you are ready to add the applications that the vice presidents are authorized to access.

☐ Click [**Applications**]. The "Add Applications" screen appears.

☐ Click [**Add**]. The "Add Applications" screen appears.

☐ **Select the Applications --** All Vice Presidents should have access to Risk Master and Email.

Select: ***Risk Master – View Only***
NT Account – End User
Email – End Use

☐ Click [**Close**]. Click [**Close**] again to close the Profile screen.

NOTE: When an account is created for a vice president, they will receive all of the applications in the Default Profile plus the applications in the Vice President Profile.

End of Lesson Five

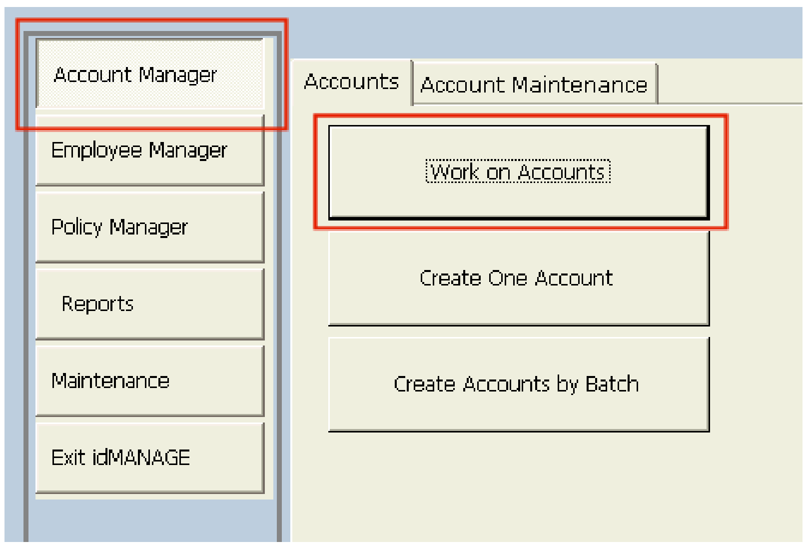
Lesson Six – Creating Accounts

Create a Single Account

This exercise will show you how to create a single account.

1. Open the View Accounts Search Screen:

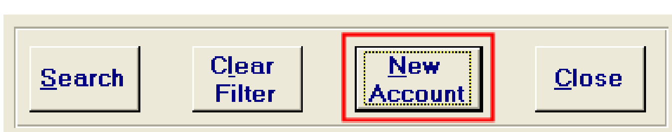
☐ From the Main Menu, click **[Account Manager]**. The Account Manager's submenus appear. There are two tabs: Accounts and Accounts Maintenance.



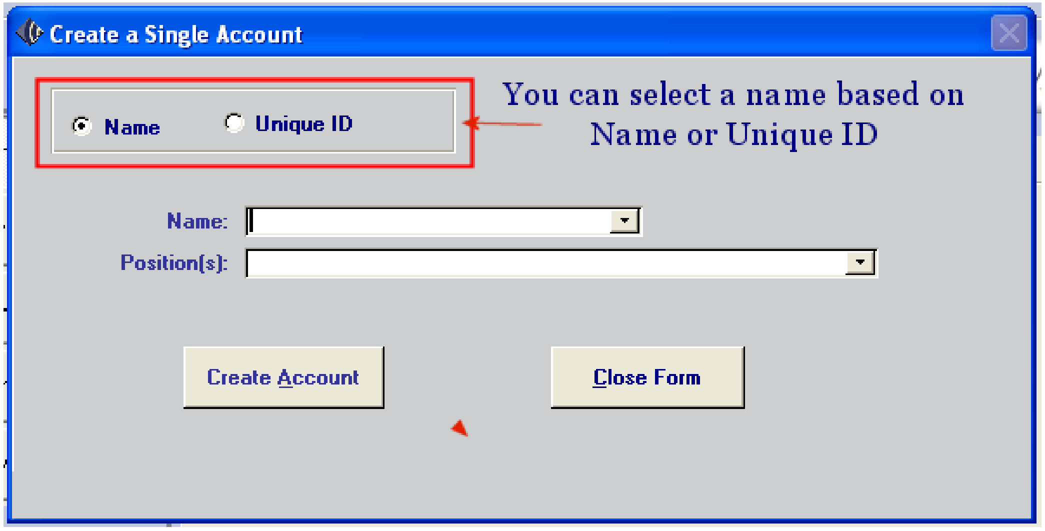
☐ On the Accounts tab, click [**Work on Accounts**]. The "View Accounts Selection Form" appears.

2. From the View Account Selection form.

☐ Click [**New Account**] on the command bar.



The "Create a Single Account" screen appears.



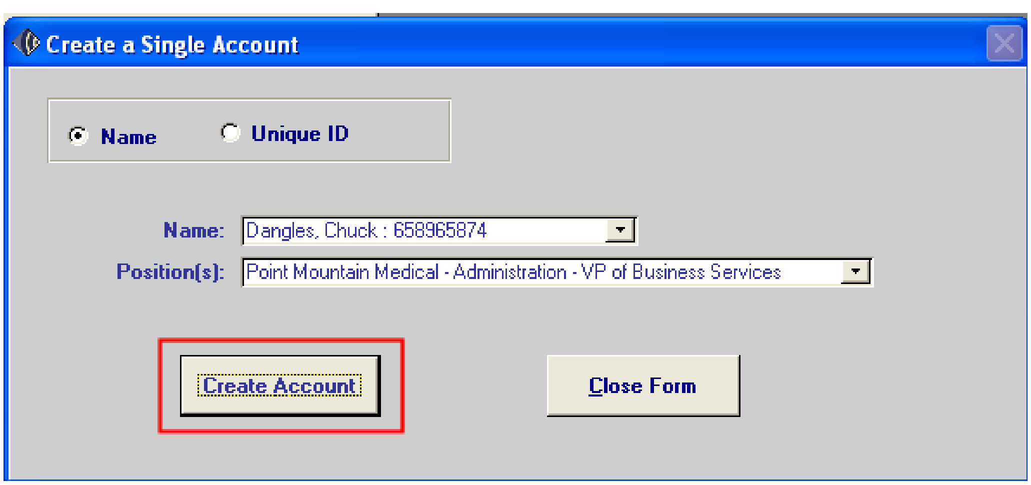
☐ From the drop down box, select the person's name. This list is populated from your person information.

Select ***Dangles, Chuck.***

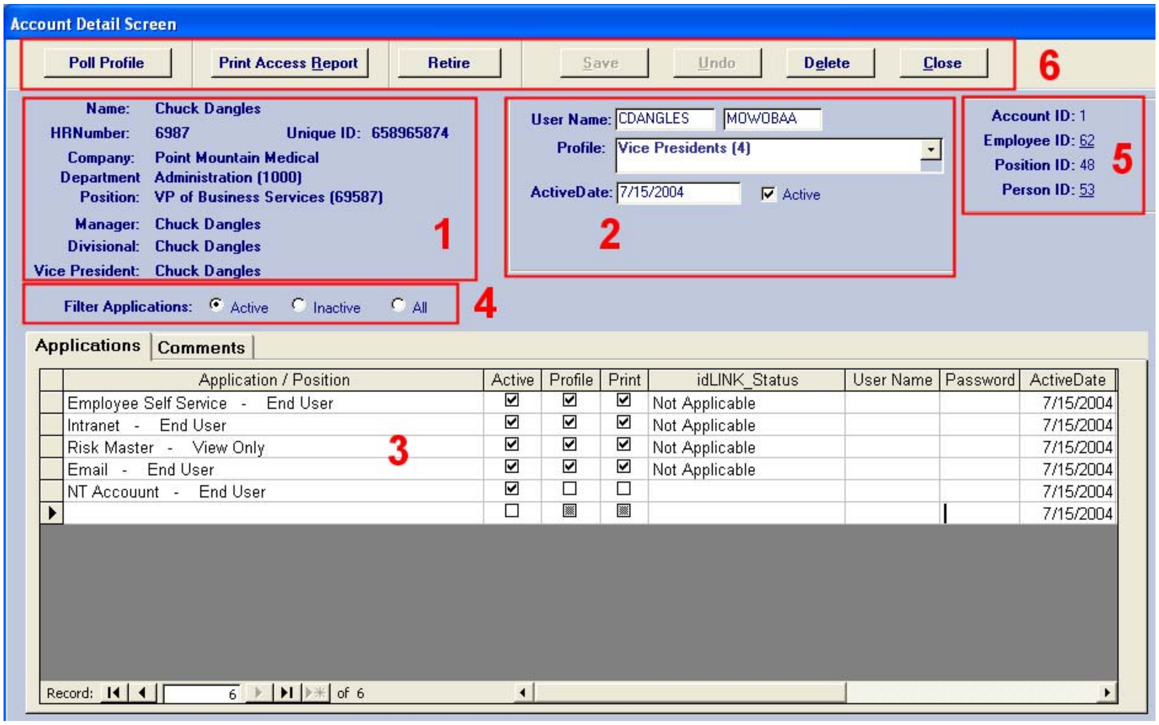
☐ The employee's position is automatically filled in for you. This list is populated from your employee information.

Chuck is VP so he will be assigned applications from the Default Profile and the Vice President's Profile.

☐ Click [**Create Account].** A new account will be created and displayed.



The Account Detail Screen appears.



The majority of your work will be done in this screen so it would be a good time to review its' contents.

Section 1 – Employee Information. This section contains user's human resource (HR) information. The screen identifies the user's company, department, position, and manager. It is very useful when you need to get approval from a manager. This information is gathered from the Employee Manager module.

Section 2 – Account Information. This section provides information about the account: Username, Password, which profile is in place, when the account became active, if applicable, and when it became inactive.

You will notice that the user's username and password were created automatically based on information entered in the Company screen.

TIP: If you want to view the profile, double click on the profile name. The Profile screen will appear.

Section 3 –Access. This section tracks which applications, access level, and other items the user currently has access to. You can also maintain access history. When a person no longer needs access to a resource, you can uncheck "Active".

The idLINK Status column displays the status of the account in the actual application. If a link is available to the application, idMANAGE™ will create the account for you. In this example, there are no links so all of the accounts will need to be created/added manually to the applications.

TIP: You can add additional access, inactive access or delete access also.

Section 4 - View Active or History Access. This area allows you to view only active access, inactive (history), or all access.

Section 5 - idMANAGE™ Information. This section shows *id*MANAGE™ account numbers. You can also display the person and employee information for this user. We will cover this later in this chapter.

Section 6 – Command Bar – There are seven buttons on the Command Bar:

- **Poll Profile** – If a profile is assigned to the user's position, this button will be "Poll Profile". This feature allows you to verify the user's existing applications against the assigned profile. This is useful when a user transfers from one position to another and you need to know which applications to remove or add.
- **Create Profile** – If there is not a profile number in Profile, this button will be labeled "Create Profile". This feature is a time saver. It allows you to create a new profile based on the user's active applications without ever leaving this screen!

> Note: A position can only be linked to one profile. If you attempt to create a profile for a position that is already assigned to another profile, you will get a warning message. You will be given the option of creating a new profile for this position or leaving it in the current profile.

- **Print Access Report** – This feature prints an access report for your user.
- **Retire** – This feature retires the account for you. You use this when you want to inactivate the account but want to keep a history of access.
- **Save** – This feature saves the current record.
- **Undo** – This feature cancels (undo) any changes since the last save. It becomes enabled once you enter a change on the form.
- **Delete** – This feature deletes the account.
- **Close** – This feature closes the form and returns you to the Selection form.

3. Click [**Close**] to close this form. You will create two more accounts.

4. Create an account for Matilda Rollins. Matilda is an Administrative Intern for Point Mountain Medical. We do not have a profile created for Administrative Interns so Matilda will be assigned the Default Profile.

5. Create an account for Billie Ruth. Billie works for a different company (PM Research) and we do not have a profile set up for her position. Therefore, we will need to create her account and add her applications

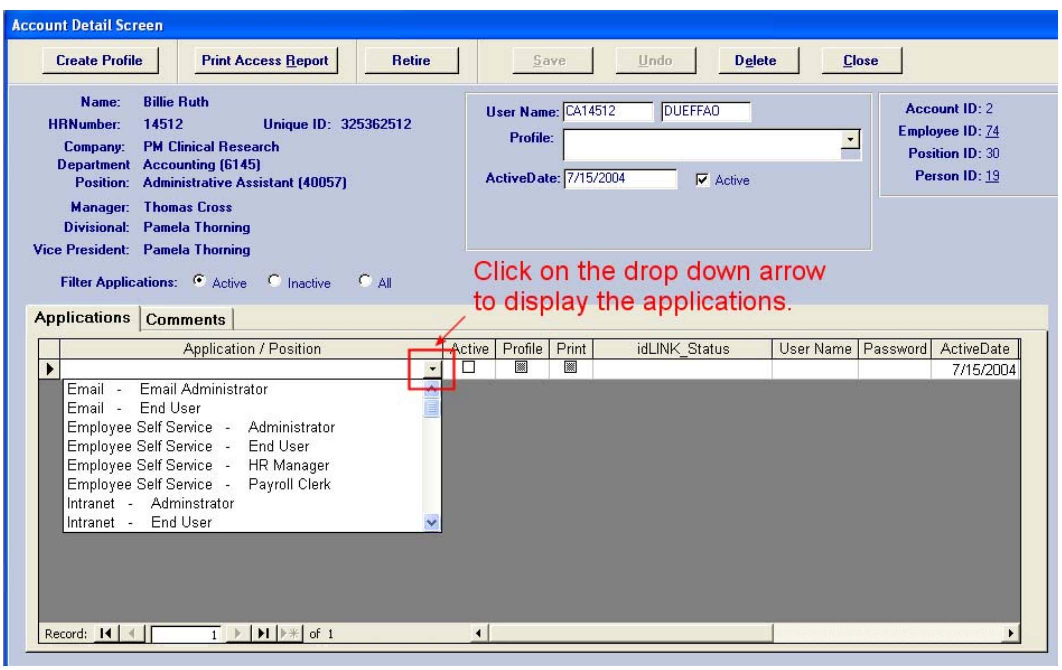
☐ Create Billie Ruth's account.

☐ In the application section, click on the Drop Down arrow to display the applications. Select:

- ***NT Account - End User***
- ***Email – End User***

Check the **Active** and **Print** boxes. Active indicates that this is an active account. Print indicates that this application will print on the user's account statement.

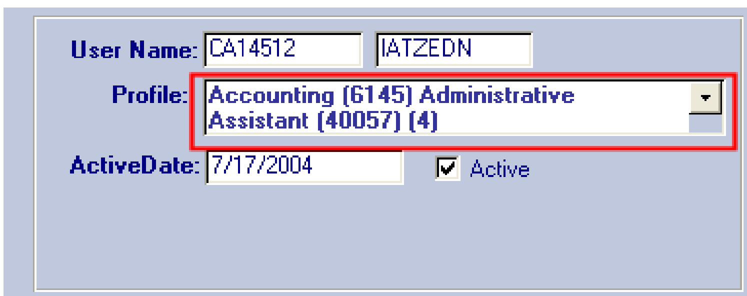
The idLINK status reads "Add Manually" alerting you that there is not a link to the applications. You will need to add the account to the applications.



☐ Now that you have created Billie's account, you will create a new profile for this position that will be applied to any new employees in this position.

Click **[Create Profile]** in the upper left hand corner.

A profile will be created for this position. You may edit the profile by <u>double clicking</u> on the profile title. This is the only place in *id*MANAGE™ that you will need to double click. Many times, you need to change the profile, so a single click would be always open the profile.

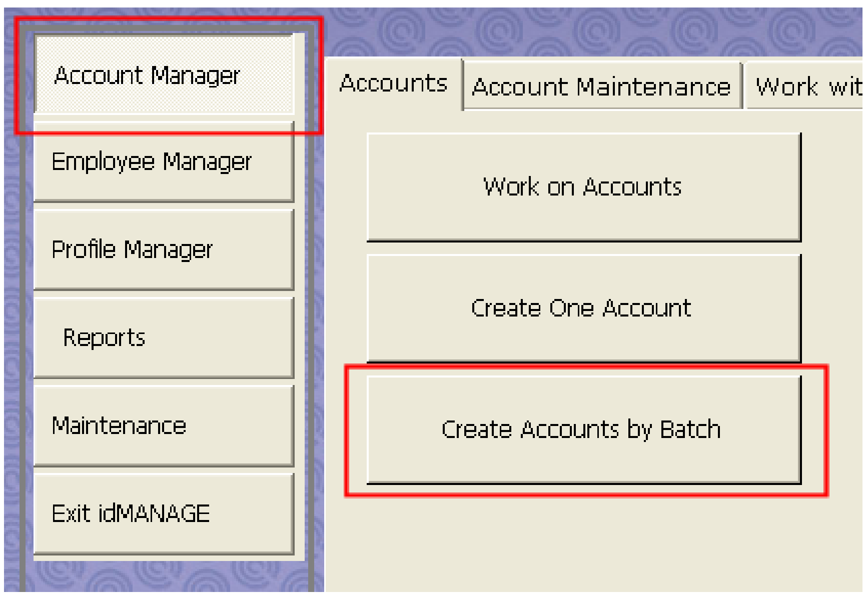


Create Accounts By Batch

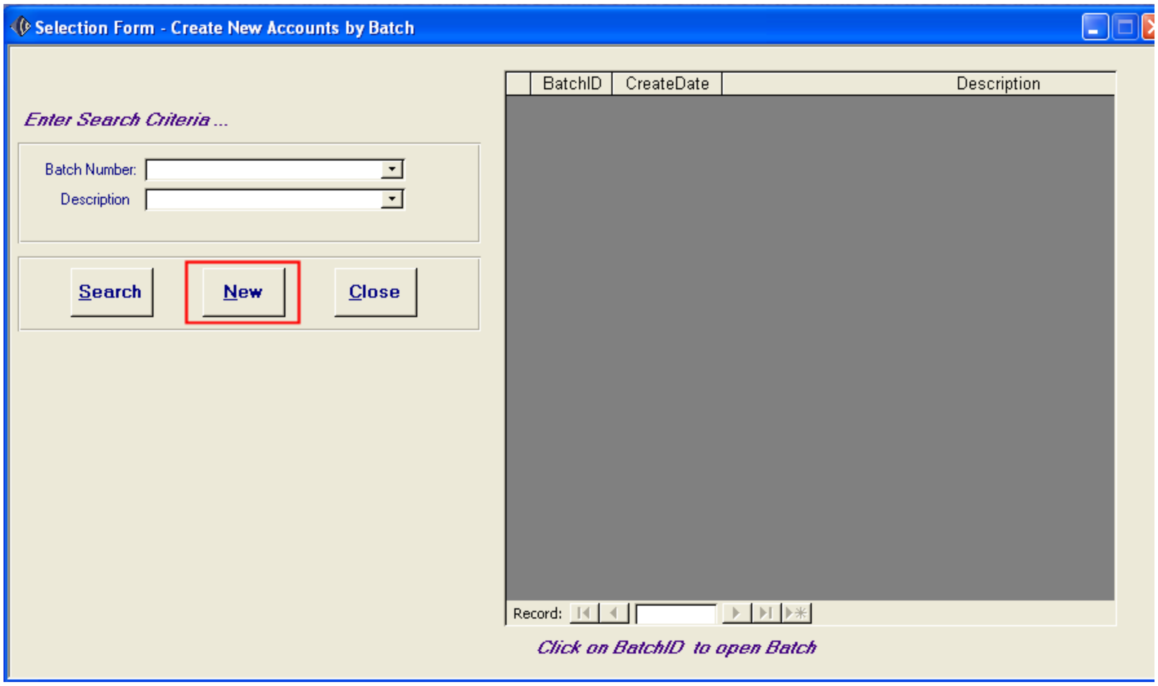
This exercise will show you how to create multiple accounts at one time. It is a great feature when you need to create many accounts for new employees especially during orientation.

1. Create a new batch:

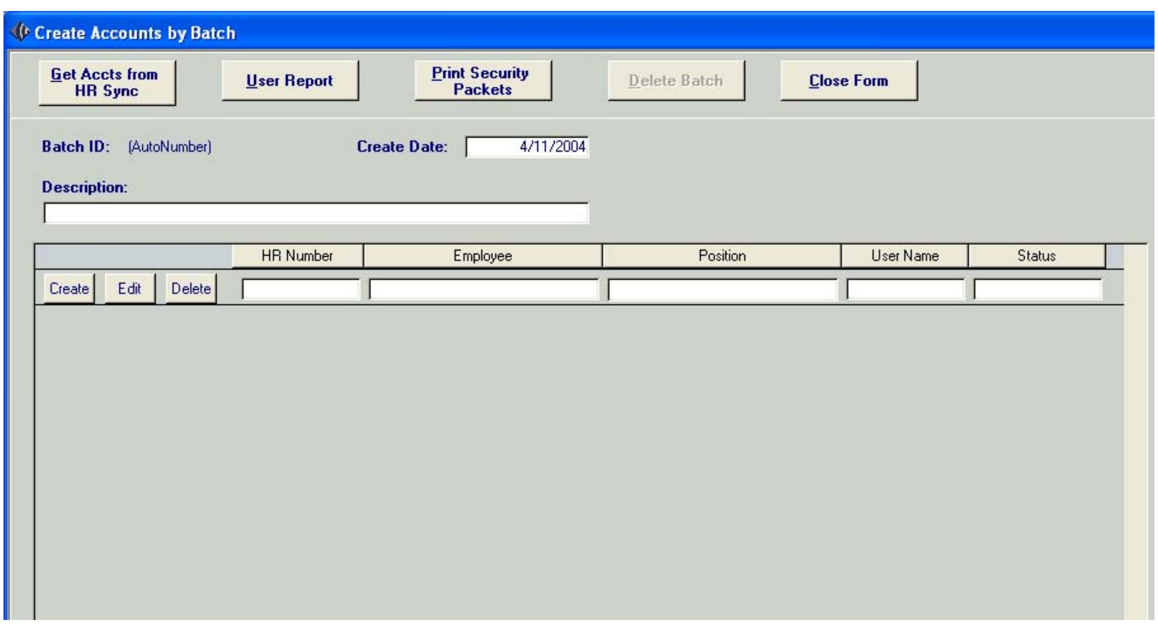
   ☐ From the Main Menu, click [**Account Manager**]. The Account Manager's tabs appear. There are two tabs: Accounts and Accounts Maintenance.



   ☐ On the Accounts tab, click [**Create Accounts by Batch**]. The **Create New Accounts – Selection Form** appears.



☐ Click **[New]** to create a new batch. The **Create Accounts Batch** screen appears.



2. Complete the form.

   Create Date – Enter the date the batch was created. It is automatically filled with today's date. You may change this date by typing over the date.

   Description – Provide a descriptive name for this batch.
   Enter ***Orientation***

3. Enter the HR Number of the employees you want to create accounts for.

   There are three ways you can enter HR Numbers:

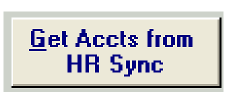
   1) Get HR Numbers from a HR Sync process.
   2) Paste the HR Numbers from a spreadsheet
   3) Enter the HR Numbers manual

   For this exercise, we will get the HR Numbers for a HR Sync Process.

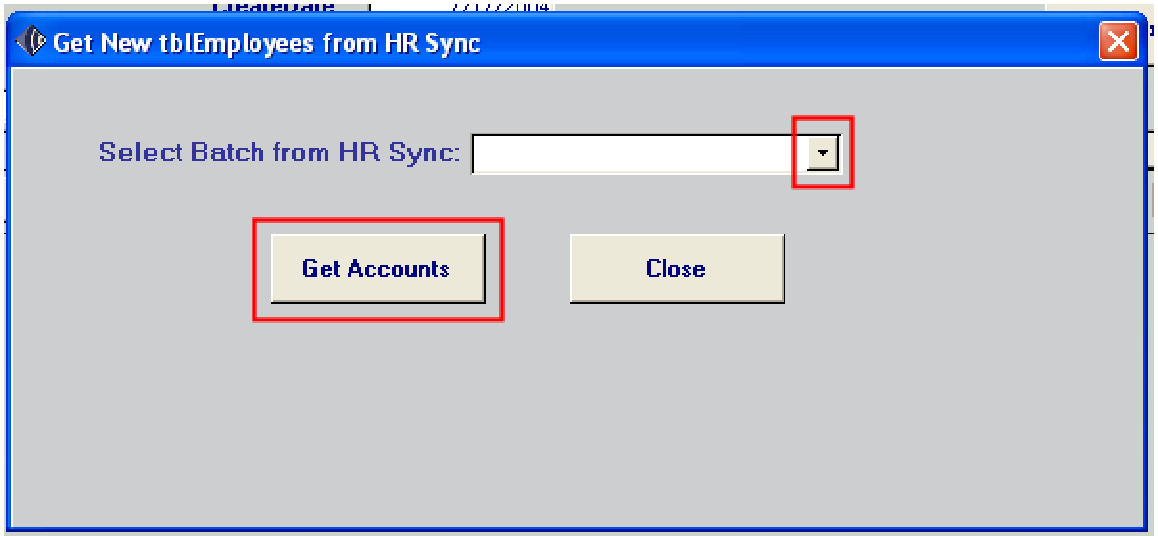
☐ Get HR Numbers from a HR Sync Process

This method saves time when you need to create accounts for all of the employees that were added during the HR Sync process. It eliminates the need of you having to enter them yourself. It will bring in every employee who is assigned to a profile.

☐ Click [**Get Accts from HR Sync**] on the Command Bar

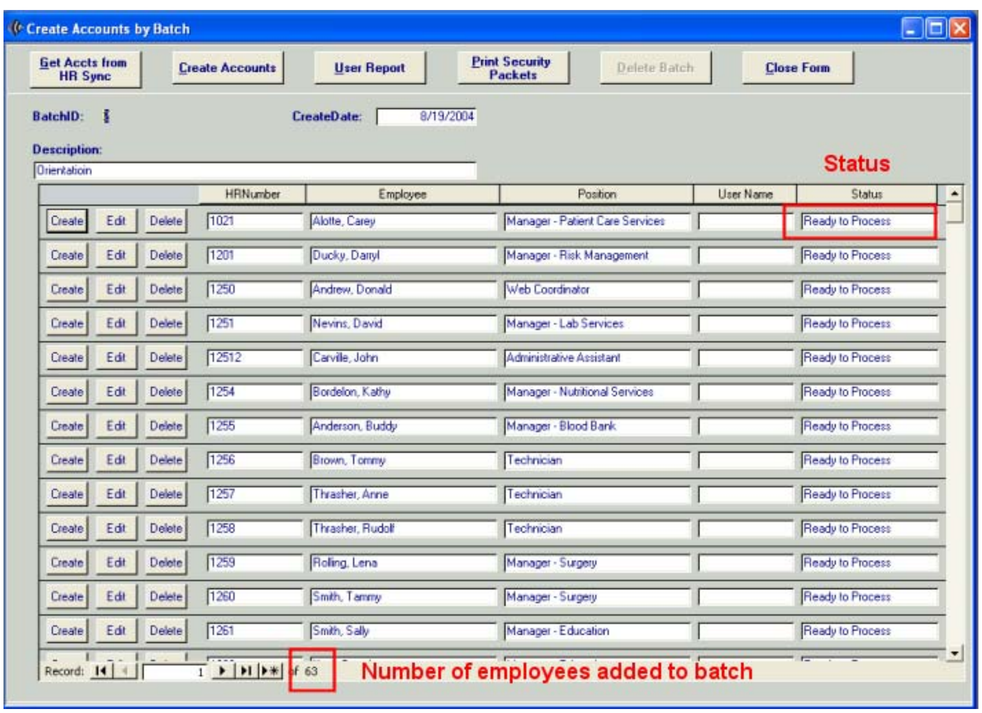


The following screen appears asking you to select the batch and date you want to retrieve.



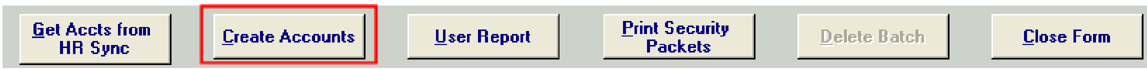
☐ Click on the drop down arrow to select a date.

☐ Click **[Get Accounts]**. The new employees that were identified during this HR Sync process are added to this batch. NOTE: Only employees that have assigned profiles are added. For this HR Sync, we will bring in every new employee because we have a default profile assigned the company.



4. Create the Accounts.

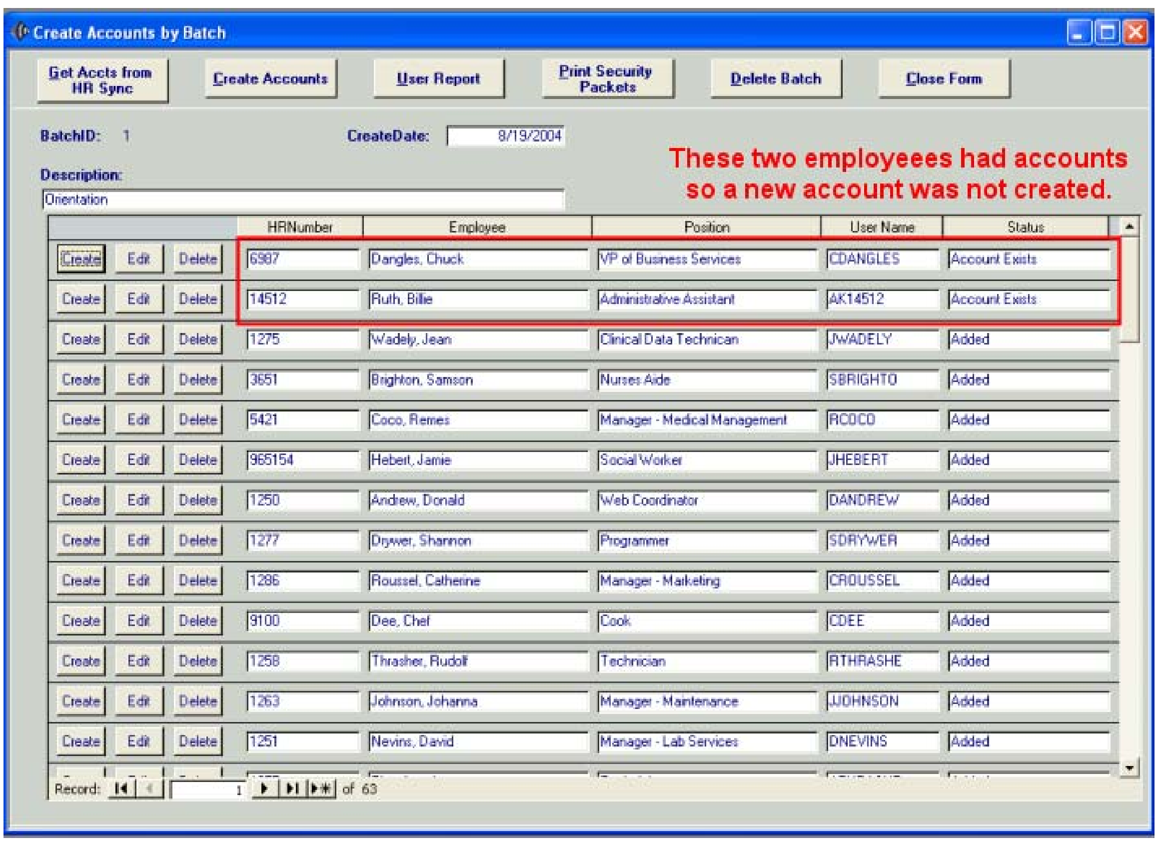
☐ Click on **[Create Accounts]** on the Command Bar. An account will be created for each user.



When the process is finished, the username and status will be updated with the latest information.

☐ Click on **[Status]** label on the column labels. This will sort the items by status. Click it again so that 'Account Exists' appears at the top. Sorting works on all of the columns

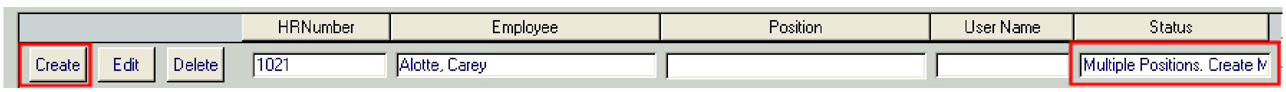
Chuck Dangles and Billie Ruth did not have a new account created because they already had accounts.



HRNumber	Employee	Position	User Name	Status
6987	Dangles, Chuck	VP of Business Services	CDANGLES	Account Exists
14512	Ruth, Billie	Administrative Assistant	AK14512	Account Exists
1275	Wadely, Jean	Clinical Data Technican	JWADELY	Added
3651	Brighton, Samson	Nurses Aide	SBRIGHTO	Added
5421	Coco, Remes	Manager - Medical Management	RCOCO	Added
965154	Hebert, Jamie	Social Worker	JHEBERT	Added
1250	Andrew, Donald	Web Coordinator	DANDREW	Added
1277	Drywer, Shannon	Programmer	SDRYWER	Added
1286	Roussel, Catherine	Manager - Marketing	CROUSSEL	Added
9100	Dee, Chef	Cook	CDEE	Added
1258	Thrasher, Rudolf	Technician	RTHRASHE	Added
1263	Johnson, Johanna	Manager - Maintenance	JJOHNSON	Added
1251	Nevins, David	Manager - Lab Services	DNEVINS	Added

Three are three additional Buttons on this Form: Create Edit Delete

Create Button: Sometimes an employee will have more than one position with a company. When this occurs, you will need to create the account manually so that you can select the correct employee position. These employees are identified by having "Multiple Positions" displayed in the Position field.



Edit Button: Allows you to edit the account once it has been created.

Delete Button: Allows you to delete the entry from the batch. Be careful because there is no warning. However, simply type in the HR number again to add it back.

Print New Account Reports

There are three reports that are available with Creating Accounts by Batch:

1. **New User Report** – This report is summary listing of the accounts that were created.

Point Mountain Medical

New User Report

Saturday, July 17, 2004

Description: Orientation

Batch: 3

Account Status: Added

Name	Unique ID	User Name Profile		DeptName	Manager
PM Clinical Research - Administrative Assistant (40057)					
Carville , John R	215253263	CA12512	3	Accounting	Thomas Cross
Point Mountain Medical - Administrative Assistant (40057)					
Anderson , Kathryn	965857412	KANDERS	1	Accounting	Charlie Albert
Brone , Tom	362965841	TBRONE	1	Accounting	Charlie Albert
Kleinpeter , Beth	147251845	BKLEINPE	1	Patient Care Ser	Carey Alotte
McNabby , Robert	265956745	RMCNABB	1	Administration	Chuck Dangles
Point Mountain Medical - Admissions Clerk (65141)					
Williams , JoNell	254145874	JWILLIAM	1	Admissions	Drew Sumtin
Point Mountain Medical - Business Analyst (65475)					
Hebert , Tab	598457458	THEBERT	1	Accounting	Charlie Albert
Point Mountain Medical - Chief Executive Officer (15954)					
James , Kirt T	265147958	KJAMES	1	Administration	Chuck Dangles

2. **New User Report** – Detailed.

This is your worksheet report that reports the accounts that need to be created in each system. It reports the systems and the information needed to establish the accounts in the system. You create your accounts from this report. It helps you keep track of where you are in the process of adding accounts. The two applications listed in the report did not have links to the actual application, so you will need to manually create the accounts.

Point Mountain Medical

New User Report - Detailed

Saturday, July 17, 2004

Description: Orientation

Batch: 3

Application: Email

idLINK Status Add Manually

Username	Password	Name	Unique ID	Department	Manager
CA12512	WIDAFUA	Carville , John R	215253263	Accounting	Thomas Cross
CA14512	ASAWODH	Ruth , Billie	325362512	Accounting	Thomas Cross
CDANGLES	EWIFENN	Dangles , Chuck	658965874	Administration	Chuck Dangles
DESNARDO	ODILUMF	Esnardo , Donna	714257845	Administration	Chuck Dangles
GSCULLEY	IWATESY	Sculley , Garrison	967157845	Administration	Chuck Dangles

Application: Employee Self Service

idLINK Status Add Manually

Username	Password	Name	Unique ID	Department	Manager
AANDER01	EAMFUPS	Anderson , Adrian	124854532	Accounting	Charlie Albert
AANDERSO	MIZECIU	Anderson , Aimes	458451256	Gift Shop	Cornell Williams
ACHOVIE	UXOSOFC	Chovie , Anne	326584571	Marketing	Catherine Roussel
ATHRASHE	OIVTAVW	Thrasher , Anne	695312457	Lab Services	David Nevins
BANDERSO	QALICEA	Anderson , Buddy	874094564	Blood Bank	Buddy Anderson
BFILING	XANNAIU	Filing , Betty	745856584	Human Resources	Terry Smitty
BKATO	BAOHDEI	Kato , Brenda	654145874	Education	Brenda Kato

3. **User Access Report** – This report can be given to the user to let them know what systems they are authorized to use.

Point Mountain Medical

Account Listing

Saturday, July 17, 2004

Name: **Alotte, Carey S**

AccountID: 16
ActiveDate: 7/17/2004

HRNumber: 1021
Name: Point Mountain Medical
Department: Patient Care Services
JobTitle: Manager - Patient Care Services

This form contains your confidential User Names and password. They have been issued to you so that you may fulfill your job responsibilities. It is your responsibility to ensure the codes remain confidential. Please keep them in a safe place. If you suspect that anyone has discovered your password, you must change the password immediately.

Application	Position	User Name	Password	CreateDate
Intranet	End User	calotte	lacugoa	7/17/2004
Employee Self Service	End User	calotte	lacugoa	7/17/2004

End of Lesson Six

Conclusion

You made it through the sample lessons of *id*MANAGE™. By working through these lessons, you should now have a good working knowledge of *id*MANAGE™ and how easy it makes managing your user population.

Remember, managing user access is like unlocking a combination lock. Once you have the right combination, authorized access can be opened securely. With *id*MANAGE™, you can have the right combination.

- **Precision** – With Profiles, you can consistently apply appropriate access to your user population.
- **Authority** – By assigning an owner to your profiles, you can apply authorized access profiles.
- **Confidence** – By using profiles and other standards, you can be confident that you are providing the correct access.

Give us a call today at *id*MANAGE™ so that you can begin using it in your company.

Point Mountain, LLC
12122 Pecan Grove Court
Baton Rouge, LA 70810
Telephone: (225) 485-6075
Email: Sales@idmanage.biz
www.idmanage.biz