



**HAWAII STATE DEPARTMENT OF HEALTH**  
HEALTHY PEOPLE - HEALTHY COMMUNITIES - HEALTHY ISLANDS

## **SLD LabOnline Manage All Accounts Guide**

The **Manage All Accounts** feature allows designated LabOnline Administrator contacts on client sites to maintain LabOnline **accounts** for other designated contacts within their organizations. Users with this role are granted privileged access to reset passwords, unlock logins, add / request new accounts, manage permissions and disable users within the designated organization. The LabOnline Administrator is responsible to remove access to users who no longer work at their facility. You can use this feature to control users who can view data and receive final reports for samples associated with the clients you manage. Granting permission at the client level means the user has that permission for all samples associated with the client. Permission at the profile level means the user is limited to samples associated with this profile within the client.



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## I. Manage User Account

To **manage** a user's account, do the following:

1. **Select Manage All Accounts** from the user drop-down menu in the upper right corner of most LabOnline pages.

The **Manage All Accounts** page displays all **accounts** that your role can **manage**.

From this page you can:

- view basic information for the **accounts** listed including, the name, sign in status, and names of clients the account can access
- use the grid filter to hide any column, except the user name
- highlight an account to remove it from the list
- unlock an account if the Locked column indicates the account is locked.

2. Click the **User ID** link to open the account for that user.

This page contains the user ID and user name of the account, as header information, as well as editable personal information for the account holder. You then have two panels at the bottom that contain hierarchy information about the customer, profile and workorder ID on the left. Selecting an object from the left highlights the row and shows the scope details of the permissions for the selected object to the right.

From the User Account page you can:

- view user ID (Firstname Lastname) in the page header.
- view and edit personal information of the user account (name, company name, email)
- select a profile or account name in the Permissions panel, to view and edit details of the settings in the right panel.
- add and edit user permissions for the associated name and profile.
- click **New Scope** to open a modal and select a new client or profile to the user account.
- click **Save** to add the scope to the permissions list, then select the added entry and choose its permissions settings in the right panel.



- Select an entry from the Permissions list and click Remove to remove permissions for the client and profile from the user account.

3. Click **Save** if you have made any changes.

## A. Create a New Account

To create a new LabOnline account, complete these steps:

1. Click on your name in the user menu, which is located in the top right corner, then select **Manage All Accounts** from the drop-down menu.
2. Click **New Account**.
3. On the New User Account page, enter the name of the user. Enter their email address, and then enter it again to confirm. The email address will be used as their unique User ID and can only be changed by the laboratory once the account is created.

The screenshot shows a web form for creating a new user account. It has the following fields and elements:

- First name:
- Middle name:
- Last name: \*
- Company name:
- Email: \* (User ID)
- Confirm email: \*
- Client access: \*  with a red 'x' and green '+' icon next to it.
- Buttons:  and

4. In the Client access drop-down, choose a client for which you want to grant the user permission. The drop-down list displays all clients that you have permission to administer. Click the add link to add another client.
5. Click **Save** to save the new account. The user will receive an email with a link to log on and reset their password.
6. The User Account page opens for the new user, allowing you to choose additional permissions settings.
7. Click **Save** if you have made any additional changes.

## II. Field Descriptions for Manage All Accounts

### A. Manage All Accounts Grid



Column	Details
User ID	Unique User ID assigned to the account. Entries in this column are links to the User Account page.
Last Name	User's last name.
First Name	User's first name.
Last Sign In	Date and time when the user last signed in.
Locked	Displays 'Yes' when the Indicates account is locked. <b>Accounts</b> are locked after three unsuccessful sign in attempts as a security measure.
Access	List of clients for which the account has access.

## B. User Account Details

Accessed after clicking the User ID link on the **Manage All Accounts** grid.

Column	Details
User ID	Unique LabOnline generated User ID assigned to the account.
First name	User's first name.
Middle name	User's middle name.
Last name	User's last name.
Company name	Name of the company who employs the user.
Email	Client's email address of the user.

## III. Permissions

The Permissions block is divided into two panels. The left panel contains a tree view of the user's access based on the user records and the right panel displays details of a selection from the tree in the left panel.






The tree levels are arranged as follows:


- Top-level nodes display the client's name and indicate client-level access.
- Second-level nodes are for profile access. They display the profile description or profile name when the profile has no description.
- Third level nodes are for workorder access. They display the client's workorder ID if available or the lab workorder ID if the client ID is not available.

Granting permission at the client level means that the user has that permission for all samples associated with the client. Granting permission at the profile level means the user is restricted to samples associated with that profile within the client. Similarly, granting permission at the workorder level means the user is restricted to samples associated only with that workorder within the profile.

Each node in the tree displays up to four icons that indicate the user's access permissions within that scope. The icons are repeated in the right panel next to the corresponding field.

Icon	Field	Details
	View data	Grants access to view data. When view data permission is granted at the client level, this setting is inherited and the checkbox is disabled for all profiles and workorders associated with the client. Similarly, when this setting is not checked at the client level but is checked at the profile level, it is inherited for all workorders associated with the client.
	Receive reports	Grants access to receive final reports. When report permission is granted at the client level, this setting is inherited and the checkbox is disabled for all profiles and workorders associated with the client. Similarly, when this setting is not checked at the client level but is checked at the profile level, it is inherited for all workorders associated with the profile.
	Order tests	Grants access to order tests for the client or profile. When order tests permission is granted at the client level, this setting is inherited and the checkbox is disabled for all profiles associated with the client. This setting does not apply to workorder-level scope permissions.



Icon	Field	Details
	Other access	This indicates LabOnline special settings assigned to the user. For example, the user may receive invoices or collection supply shipments. The display appears below the settings panel as a comma separated list. Any entry in this list indicates that the profile or workorder scope record cannot be removed. Contact the laboratory to make changes to other access permissions.

#### IV. New Account Grid

Accessed from clicking the New Account button on the top left of the **Manage All Accounts** grid.

Column	Details
First Name	User's first name.
Middle name	User's middle name.
Last Name	User's last name.
Company	Name of the company who employs the user. For new <b>accounts</b> , this field defaults to your company name.
Email	User's email address. This field becomes the User ID for the account and must be unique.
Confirm email	User's email address.
Client access drop-down list	Client whose samples the user is permitted to access. The drop-down list contains the list of clients you are managing.

#### V. New Scope Pop-up Window

This pop-up window is accessed from clicking the New Scope button in the Permissions block at the bottom of the User Account details page.

Column	Details
Scope drop-down list	Type of account: Client, Profile, or Workorder.



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Column	Details
Client Name drop-down list	Name of the client, profile, or workorder whose samples the user is permitted to access.