Utilizing the Access Management Page

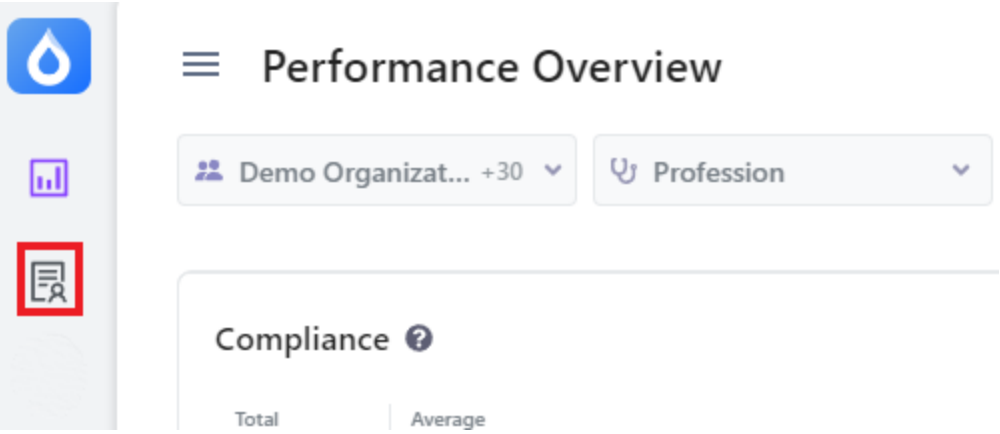
Vitalacy Specialist
10 days ago Updated

The Access Management page in the Vitalacy Web App should be utilized by facility administrators and managers to ensure that their staff members have proper access to their data. It is important that all users have the ability to login and see how they are doing and find areas of improvement on their journey towards patient safety.

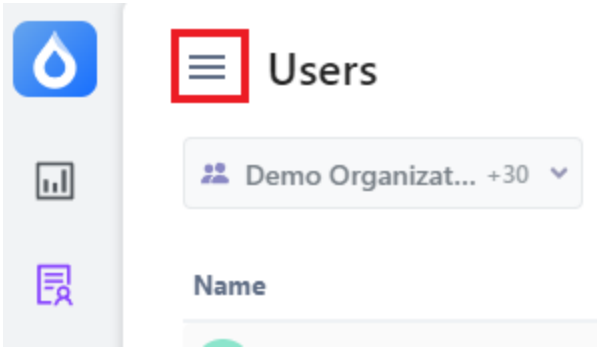
This article will show you how to locate the Access Management page and give you the tools to understand its details:

Navigating to the Access Management Page

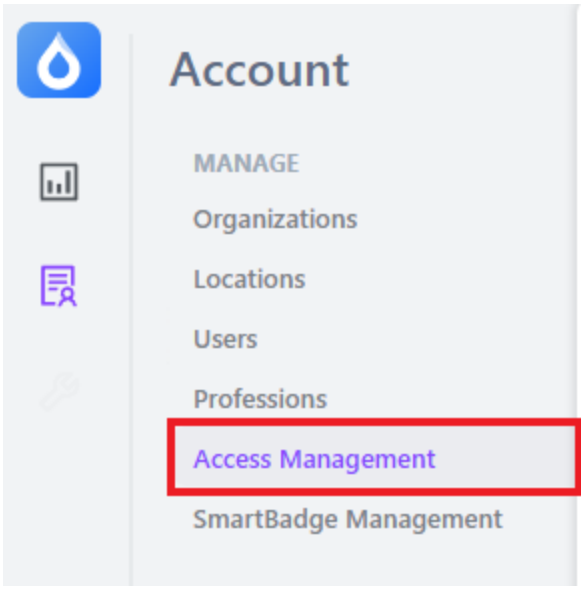
Once you have logged into your Vitalacy account, click on the ‘Accounts’ icon in the navigation menu, to the left of the page as seen in the image below:



Then use the three lines to open the dashboard menu:

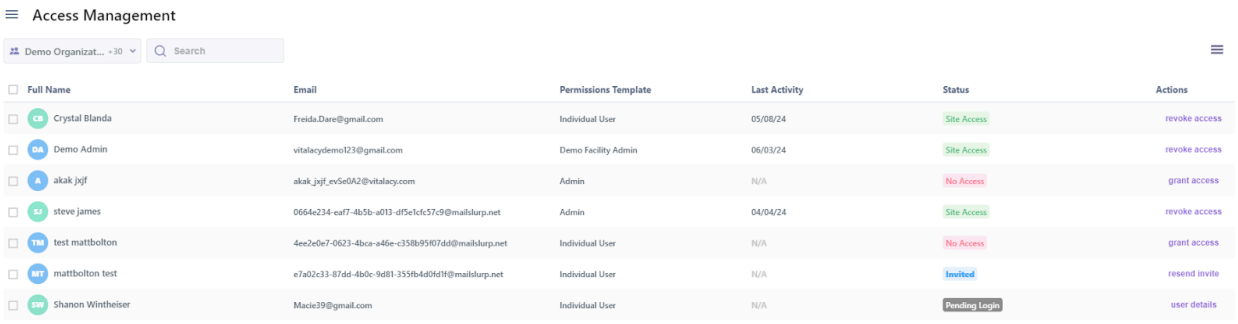


With the accounts menu open, you will see the ‘Access Management’ option towards the bottom:



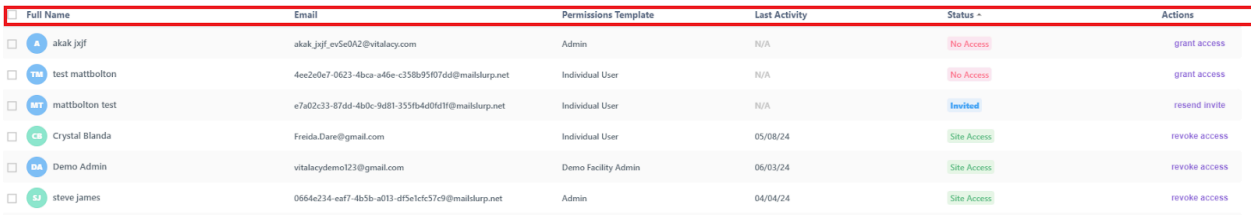
Getting Familiar with the Access Management Page

Now that you are on the Access Management page, you can begin getting yourself familiar with its features.



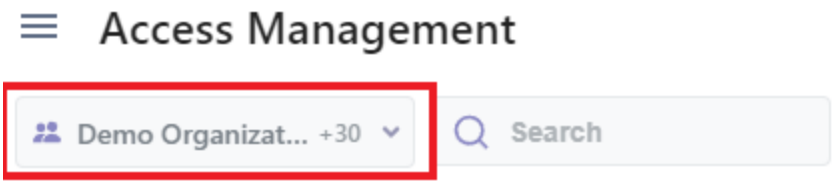
Filtering:

From here, you will be able to filter all of your unit or department's data using the headers shown in the image below:



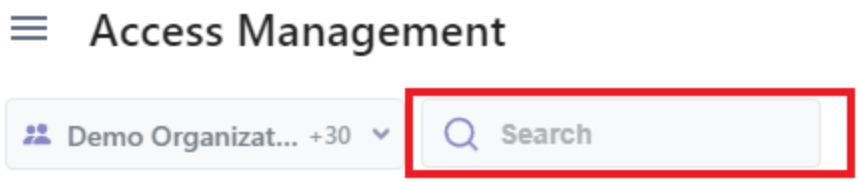
Organization:

As a facility administrator or manager who oversees multiple departments, you will have access to those department's staff members. You can use the 'Organization' dropdown in the top left of the report page. Be sure to select all appropriate units or departments that you wish to see.



Searching for Staff:

If you have a specific staff member and want to see, you can use the 'Search' option in the top left of the report page.



Statuses and What They Mean

There are four types of statuses that a staff member can have when it comes to Web App access:

1. **Site Access** - User can login into the site and view their data.
2. **No Access** - User account has not been verified. If the "grant access" action is available, then the user permissions have been revoked by an admin.
3. **Invited** - User has been sent an invitation email, but has yet to complete the first login process.
4. **Pending Login** - Site access pending first login.

Actions

Each status will give you a different action based on the status' next step. For example, if you have a staff member who has had access, but was recently terminated, you can use the 'revoke access' option to ensure they cannot log back into their Vitalacy account.

The image below shows all statuses and their corresponding actions:



1. **Revoke Access** - By choosing this action, you are taking away all site access for that user. They will no longer be able to login to their Vitalacy account.
2. **Grant Access** - This action will send an invite to that staff member via email.

Pro Tip: You have the option to grant access when adding new users in the Web App. If you need assistance, the Adding Staff to the Vitalacy Web App article can help!

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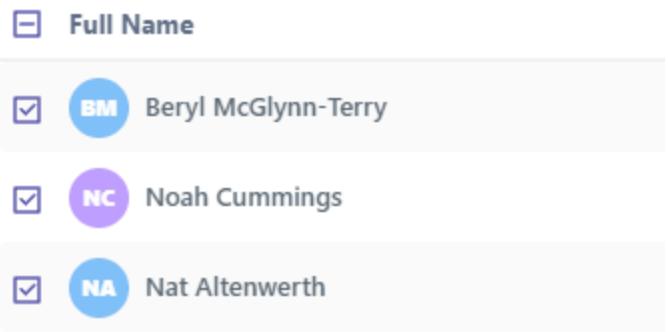
3. **Resend invite** - You can use this action to a staff member who has already been invited, but has not accessed their account yet.

4. **User Details** - This action allows you to see that staff member's details and account status.

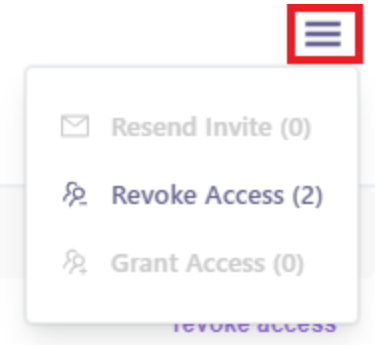
Selecting Multiple Staff Members:

You can batch select multiple staff members in order to complete their actions all at once.

For example, if you have a few staff members who need to log into their accounts, you can select all of them then click the three lines on the right of the page.

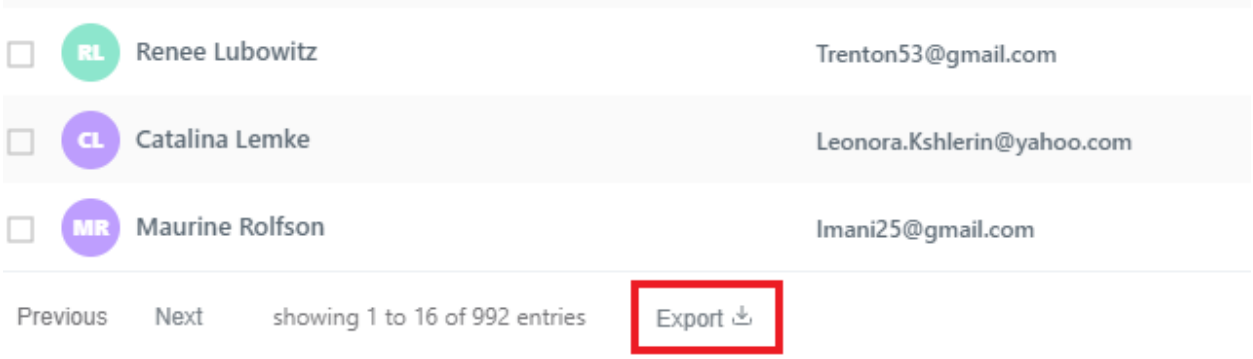


You will only be able to click on the options that apply to those selected staff members.



Export:

If you would like to print or save the list of users and their statuses, you can use the 'Export' option at the bottom of your report:



Contact Support

For continued help and support, please contact us at help@vitalacy.com 😃