Configure a User

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Find or edit a User

Follow the steps below to find or edit an existing user's details.

1. Select **Account Administration** > **User Management.**
2. Use the **Manage User for Customer** drop-down menu to select which customer to access.
3. Locate the user in the list or use the **Search** field to further drill down your search.

   > Place a check the ***"Show Deleted User"*** box to include deleted users in your search results.

4. Select the **User**.
5. Click **Edit User**.
6. ***Optional***: Modify the information.
7. Click **Save**. Otherwise, click **Close** if no changes were made.

Change a User Status

The User Status determines if a user is able to log in and access your CollaborateMD data. You are able to set your users to one of three statuses:

1. **Active**: Users in the active status will be able to log in and access CMD.
2. **Suspended**: This should be used as a temporary status. Users in the suspended status will not be able to access CMD.
3. **Deleted**: Users in the deleted status will not be able to access CMD. This status should be used for users who no longer work for your organization. This status does not permanently delete a user from your account.

> **Suspended** or **Deleted** users will receive the following message when attempting to login. *"Your user is suspended or deleted. Please contact your Administrator."*

Follow the steps below to change a user's status.

1. Select **Account Administration** > **User Management.**
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search** field to further drill down your search.

   > Place a check in the ***"Show Deleted User"*** box to include deleted users in your search results.

4. Select the User.
5. Click **Edit User**.
6. Use the **Status** drop down menu to select the new status.
7. Click **Save**.

> If deleting or suspending a user that is currently logged in the application, the user's session must also be killed.

Change a User Type

CollaborateMD has three (3) User Types that can be assigned to user accounts (User, Admin or Auth Rep). Each User Type has different levels of access to different tools and features that will allow you to maintain and configure account settings and functions.

Only Auth Reps are able to change the User type. However, you cannot change your own user type.

Follow the steps below to change a user status.

1. Select **Account Administration** > **User Management.**
2. Use the **Manage User for Customer** drop-down menu to select which customer to access.
3. Locate the user in the list or use the **Search** field to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.

6. Use the **Type** drop down to select the **User Type**.

> Visit our Understanding User Types Help Article for more information.

7. Click **Save**.

Assign a User Role

User Roles are predefined permissions that control access to areas and features within the application. These Roles allow you to assign different privileges to different users in your organization depending on their role. Roles will streamline the process of assigning permissions to your staff, while creating consistency in the process.

Follow the steps below to assign a user role.

1. Select **Account Administration** > **User Management**.
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search field** to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.
6. Locate and click on the **Permissions** tab from the right-hand side panel.
7. Fill in the option for **Assign to an existing permission role**.

> Visit our Permission Roles Help Article for more information.

8. Select the **Role** from the drop-down.
9. Click **Save**.

Update a User Permission

Once a new Permission role is created, it can easily be assigned to user accounts.

1. Select **Account Administration** > **User Management**.
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search** field to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.
6. Locate and click on the **Permissions** tab from the right-hand side panel.
    1. User the **Category** drop-down menu to navigate between the sections of the application.
    2. Place a check in the **Show Permission Descriptions** box to see
    3. User the **Permission Level** drop-down menu to set the permission level for each permission.
    4. Click the icon to see the change history for that specific permission level.
7. Click **Save**.
8. Click **Save** when the confirmation pop-up displays.

Grant a User Access to Customer(s)

Managing multiple customer accounts? You have complete control on which customer accounts your users can access. Users can be granted access to one or multiple customer accounts.

Follow the steps below to grant customer access to a user.

1. Select **Account Administration** > **User Management**.
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search field** to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.
6. Locate and click on the **Customer Access** tab from the right hand side panel.
7. Check the box next to the customer(s) they will have access to.
8. Click **Save**.

9. Click **Save** when the confirmation pop-up displays.

Specify User Access Hours

Want to control when your users can login into CollaborateMD? Assign specific hours for when they can lo nto the application.

Follow the steps below to configure access hours for a user.

1. Select **Account Administration** > **User Management**.
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search field** to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.
6. Locate and click on the **Access Hours** tab from the right hand side panel.
7. Place a check in the **Restrict user's access to the CollaborateMD application based on the time/day** box.
8. Use the drop-down menus to choose when the user can log in for each day.
    1. **All Day:** User can log in any time of that day.
    2. **Limited Hours:** User can log into the application during the specified time frame on that day.
    3. **No Access:** User can not log into application anytime during that day.
9. Click **Save**.

Specify User Department Level Access

Are you taking advantage of our Scheduler and want to control user access to specific departments? Settir Department level access allows you to grant edit or just view access.

Want to learn more Appointment Departments? Take a look at our **Departments** help articles.

1. Select **Account Administration** > **User Management**.
2. Use the **Manage User for Customer** drop-down to select which customer to access.
3. Locate the user in the list or use the **Search field** to further drill down your search.
4. Select the **User**.
5. Click **Edit User**.
6. Locate and click on the **Department Access** tab from the right hand side panel.
7. Place a check in the access level you want to assign for each department.
    1. **Full:** User can add, modify and save appointments within this department.
    2. **Read:** Users can only view and search for appointments within this department.
    3. **None:** Users are unable to view appointments within this department.

    > ⚠ This setting is only applicable if the **"Enable Department level access controls"** option has been selected within each department, otherwise all users will have access to that department.
8. Click **Save**.

Move a User to Another Customer

Users can be moved between customer accounts. You'd typically use this option if you created a user under a wrong customer account. Moving a user to another customer will change the default customer that they are brought to upon logging into the application.

1. Select **Account Administration** > **User Management.**
2. Use the **Manage User for Customer** drop-down menu to select which customer to access.
3. Locate the user in the list or use the **Search** field to further drill down your search.
4. Select the User.
5. Click **Move User to Another Customer** link.
6. Use the **Customer to move user to** drop-down menu to select which customer to move this user to.

7. Click **Move User**.

You are unable to move a user to another customer that they do not have group access to. Reference our Manage Access to this Customer Help Article.