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Guide for administrators: user administration

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1. Introduction

This document is intended to help clinic and department administrators manage their users.
This includes the following outputs
This includes the following actions:

- Create a user account,
- Assign a user account to a clinic or hospital,
- Assign role(s) to a user account,
- Delete or change the role(s) of the user(s),
- Revoke access to the department or clinic,
- Reset the password,
- Reactivate the user account.

For further administrative function (like merge patients) please consult separate documents or contact siris-spine@eurospine.org.

2. Protect your login details

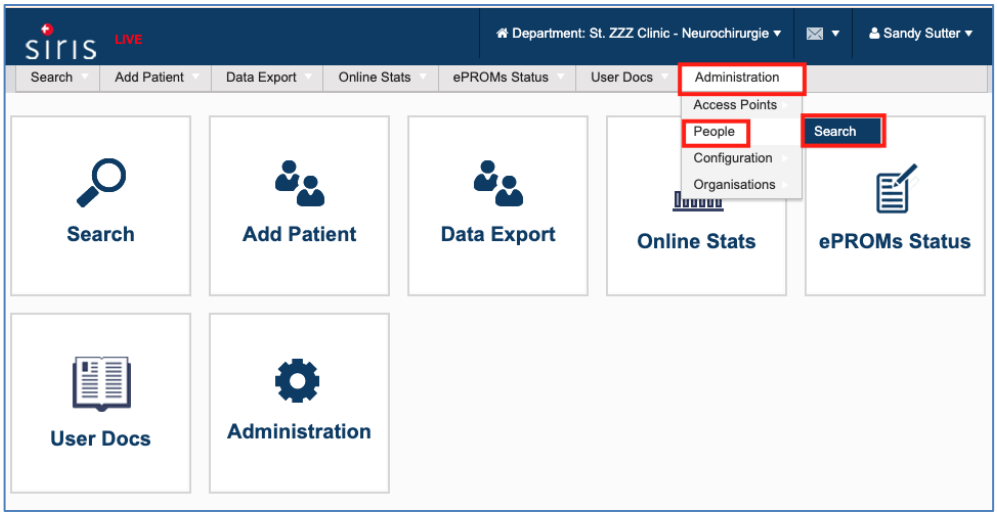
As clinic / department administrator, it is your responsibility to ensure that the following security best practices are followed:

- User accounts (especially those of Administrators) are personal and must not be shared.
- Ensure your password is sufficiently strong.
- Protect your password and do not store it unprotected.
- Accounts must not be shared. Every user in a clinic / department who needs access to the registry must have his or her own personal account. Only one account shall be created per person/user.
- Do not send usernames and passwords in the same e-mail unless secure e-mail technology is used.

3. Before you create a new user account, please check first to see if the user account already exists

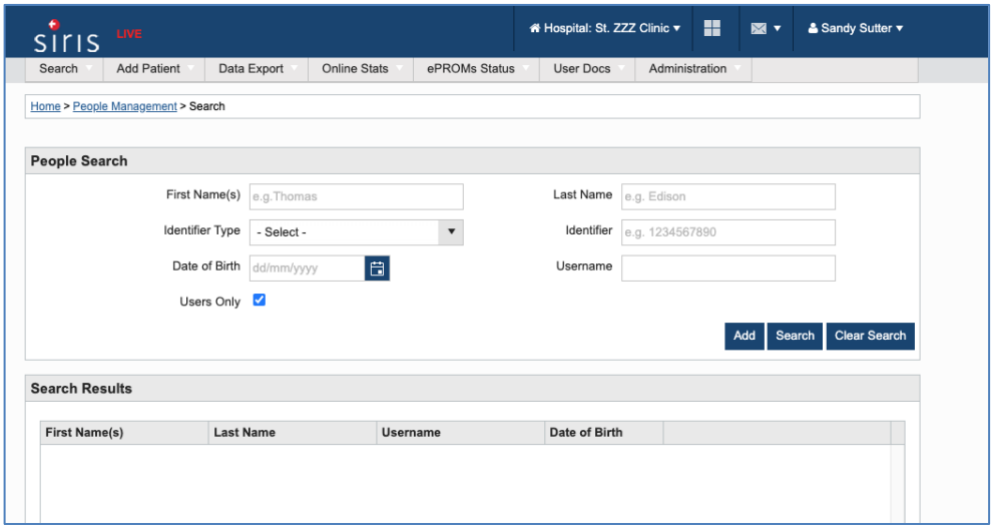
The person to be registered could, for example, have worked at a different clinic and already be registered. Before you create a new user account, please check first to see if the user account already exists.

For this, go to **Administration => People => Search**



Search for the person, for example by name.

Be aware that names with special characters such as ü/ö may be spelled as ue, oe, etc.



Once it has been verified that the user is not already registered, a new user account can be created.

4. Create a new user account

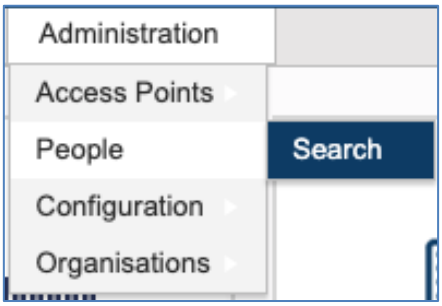
a. Login to the correct location (clinic/department)

To create a user, log in under the clinic/department in which the user works.

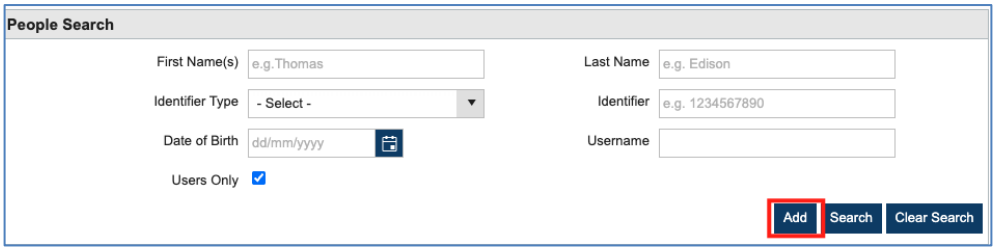
Note
This is important when you create an account for a surgeon. A surgeon must be identified as such in the system and given a 'Surgeon' skill to do so. This enables their name to be included in the list of surgeons in the search functions and in the surgical form. This skill is assigned in the user profile under the department/clinic where the surgeon operates on patients.

b. Add a new user and registering the user data

Go to **Administration => People => Search**



Click on “add”



Select “yes” to the question “Is a user?”

Complete at the minimum the following fields and make sure they are correct:

- first name
- last name
- email address

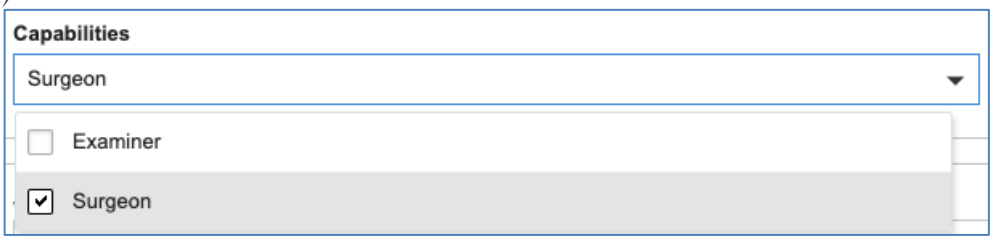
The email address must be added. This allows the user to reset his/her password through the “forgotten password” function and to receive a new password.
We strongly recommend using a business email address, which is usually deactivated after leaving the clinic.

c. Capabilities

If a user is to be listed in the list of surgeons in the surgery form (or in the list of examiners in a non-surgical form), he/she must be given the appropriate ability in his/her user account under the clinic/department.

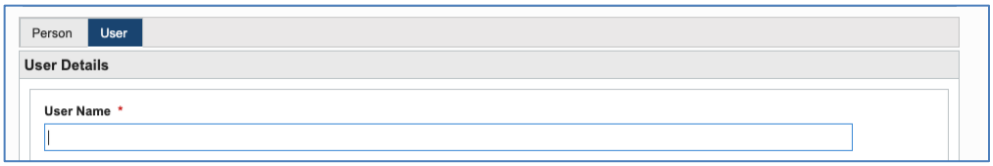
‘Surgeon‘ = for listing in the list of surgeons on the surgery form
’Tester’ = for listing in the list of testers on a non-surgical form

Tick the appropriate choice under the capabilities drop down menu. Users can be assigned several capabilities.



Once all required information are completed, click on “save” at the bottom of the page

You will then be asked to provide a username:



d. Assigning a username

Each username always consists of three components:

- Country code (**ch_**),
- First letter (initial) of the first name
- Complete last name

For example:

- Tim Solca: ch_tsolca
- Andrea Pannetier: ch_apannetier

If the last name is a double name you can use the email address as an orientation or create a long username, e.g.:
Sandra Gomez-Hernandez, s.gomez@xyz.com => ch_sgomez OR
Sandra Gomez-Hernandez, s.gomezhernandez@xyz.com => ch_sgomezhernandez

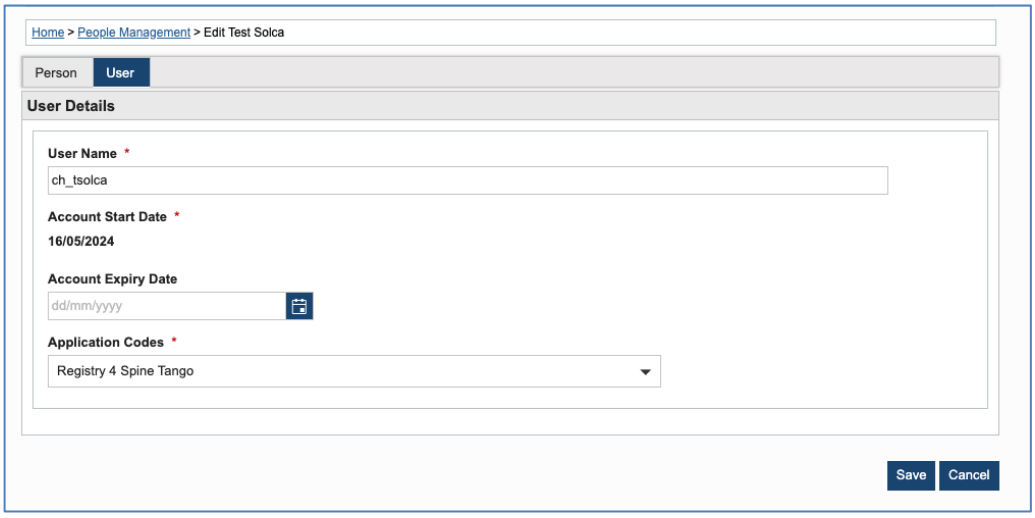
If a username is already used by someone else, add another letter to the first name, for example:

if ch_sgomez is taken by Sandra Gomez. You could give Samuel Gomez the username ch_sagomez.

Please **do not use** special characters in user names (é,è, ê, à, â, ä, ü, û, ù, -, etc..)
OK: ch_jbond

NOT OK: ch_jbônd
OK: ch_jsoellinger
NOT OK: ch_söllinger

Once the username has been created, **click on save**.



The Account start date is set automatically by the system. This can be changed if necessary and an account expiry date can be set for the account.

The application codes should not be changed and must be kept at “Registry 4 Spine Tango”.

e. Assign role(s) to the user

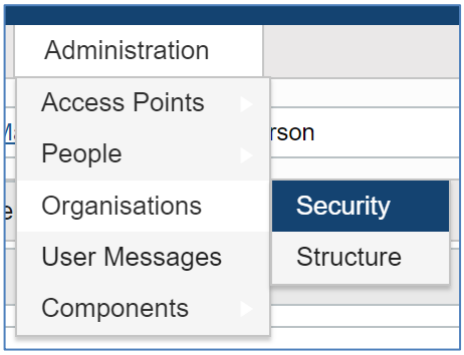
A user can be assigned one or more roles, depending on the tasks to be performed:

Role	Description
Role 1 – Clinic Administrator	Can see all data of the clinic (including its departments) and can manage the users
Role 2 – Clinic Export	Can export all data (including its departments) of the clinic
Role 3 – Department Administrator	Can see all data of the department and manage the users of the department
Role 4 – Department Export	Can export all data of the department
Role 5 – Data entry clerk	Can enter data and has access to the data allowing patient identification
Role 6 – Surgeon	Can enter data, has access to the data allowing patient identification, can export this data and create and download reports

It is the responsibility of the clinic or department to assign the correct roles to each user.

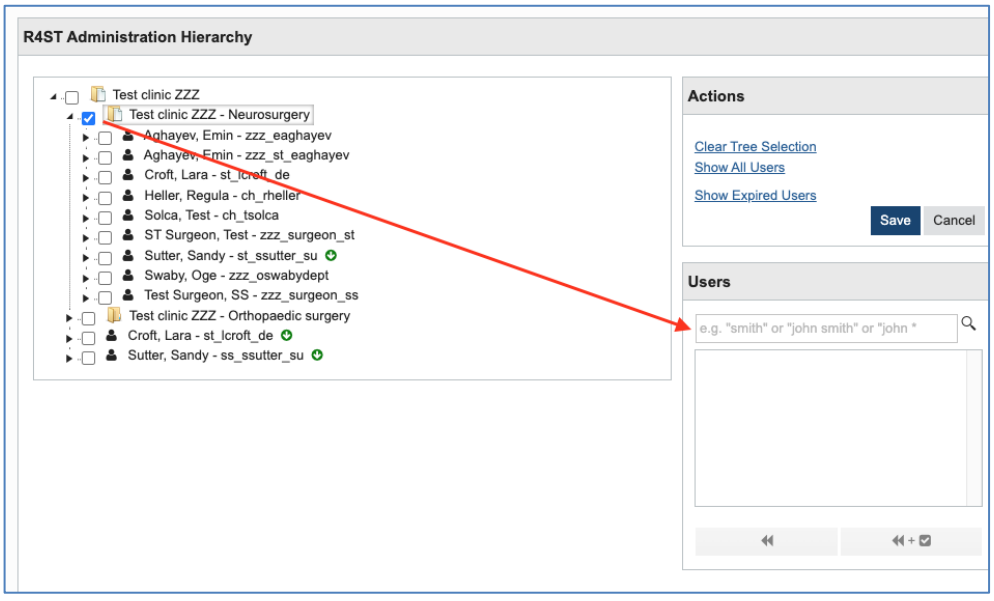
f. Grant users access to a department/clinic

Once a user has been created, they must be assigned to the correct location (department or clinic).
For this go to **Administration => Organisation => Security**



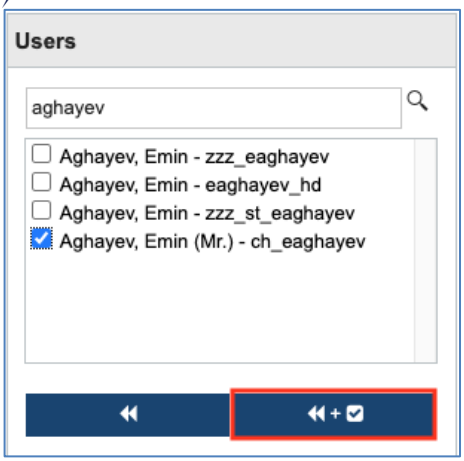
Search for the clinic or department where you want to add the user (if you have access to several clinics and departements).

Expand the desired clinic or department by clicking on the arrow
Tick the box in front of the clinic/department to activate the “Users” box on the right.

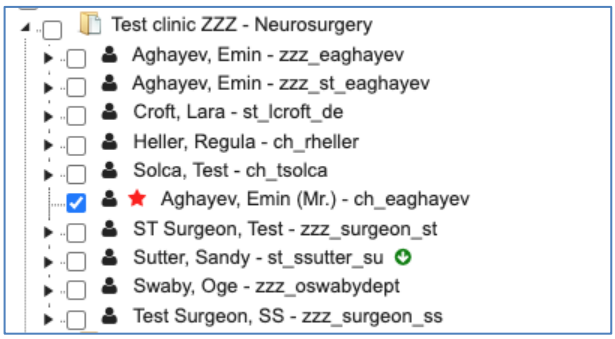


Type in the user’s last name into the field ”Users“ on your right and click on the magnifying glass. . Sometimes full name may be needed to find the correct user.

Select the correct user and hit the double arrow with the tick box to add her/him to the department or clinic as shown in the next image.

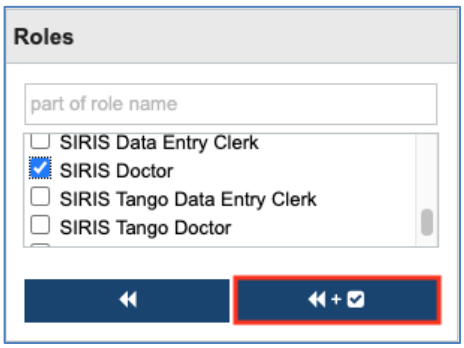


The selected user will be added to the department and will be showed with a red star

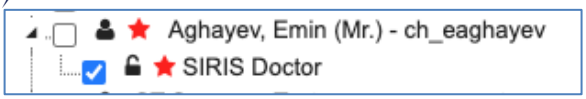


g. Giving users their role(s)

Ensure the user is selected and tick the role(s) you wish to assign to the user.
Then hit the double arrow with the tick symbol:



The user and its assigned role(s) will still be identified with a red star

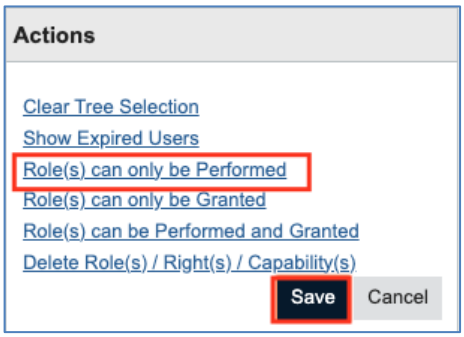


You will then need to assign an action to the role(s) – see below

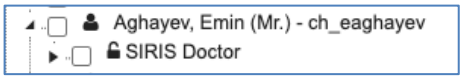
h. Assign an action to the role(s)

Actions must be assigned to the role(s), e.g. performed, granted, performed and granted, delete the roles, etc.

Under "**actions**" you must select "**Role(s) can only be Performed**" and **hit save**:



The red starts have disappeared and user and roles have been correctly saved:



List of actions related to roles

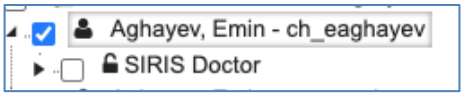
Clear Tree selection	Will remove all the selections you have made in the tree
Show Expired users	Will show all the users, including those which were removed from the tree
Delete use(s)	Will delete the users you have selected
Role(s) can only be Performed	The user can only perform the role
Role(s) can only be Granted	***For Administrators only*** The user can grant the right, but cannot perform it him/herself
Role(s) can be Performed and Granted	***For Administrators only*** The user can grant the right to another user and perform it him/herself
Delete role(s) / Right(s) / Capability(s)	The selected role/right/capability will be delted.

5. Changing user role(s)

The existing user roles can be changed at any time (add a new role/delete an existing role).

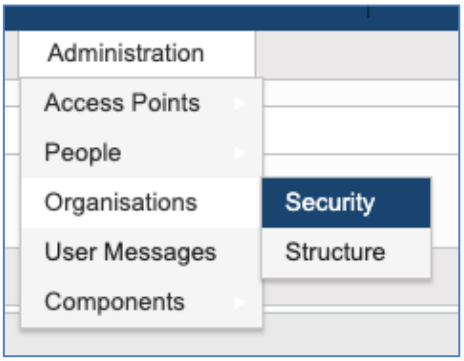
Go to **Administration => Organisation => Security**

Select the user you wish to change role for and proceed as described in the chapters above and below (granting a user their role(s) or removing user roles/rights).

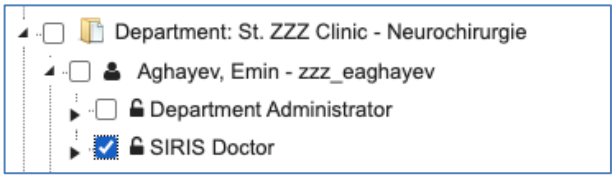


6. Delete the user role(s)

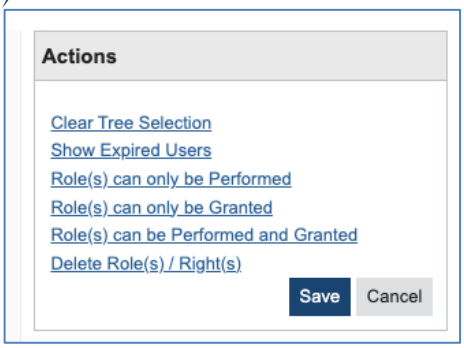
Go to **Administration => Organisation => Security**



Find the department you need to remove the user from and tick his/her role



In the Actions box, **click Delete Role(s)** and then **click on save** to save the action

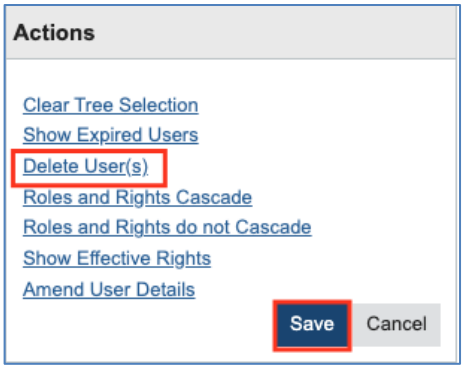


This will remove the person's role.

7. Deleting a user from a department/clinic hierarchy

To remove a user entirely from under a department/clinic, tick the box next to their names

Then in the Actions box, click on Delete User(s) and click on the **Save button** to save the action.



The user is then removed from the hierarchy and **does not have access to the department or clinic anymore**.

List of actions related to users

Clear Tree Selection	Will remove all the slections you have made in the tree
Show Expired Users	Will show all the users, including those which were removed from the tree
Delete User(s)	Will delete the users you have selected
Roles and Rights Cascade	**Not used in SIRIS Spine** This enables the user's rights to cascade to access points further down the hierarchy. E.g. if a user is at clinic level in the hierarchy, his/her rights will

	cascade to the departments below the clinic in the hierarchy. When this option is activated, a green arrow appears next to the user name.
Rolees and Rights do not Cascade	**Not used in SIRIS Spine** To remove a user's cascading rights
Show Effective Rights	Will show the list of all the user is able to do with his/her rights
Amend User Details	Will open a window allowing you to perform a few actions to the user details: • deactivate the user account • reset the password • enter an account expiry date The user's details (name, username, etc.) cannot be amended from here but must be changed from the Administration = > People menu.

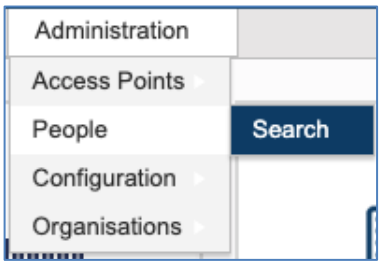
8. Deactivating a user account

User accounts should never be 'deactivated' because users could simultaneously work for other departments or change clinics.

If a user no longer needs access to your department or clinic, simply delete them from the clinic/department hierarchy as described above.

9. Resetting a password

Search and find the person under **Administration = > People = > Search**



lick on **view (NOT edit)** next to the correct user.

When you open the person's profile you will see the option to "reset password" in the top right corner.

Click on the reset password button and the new, automatically generated temporary password will be displayed.

You then have the option to send the new password via the platform (an automatic email will be sent by the platform) or copy the password and send it to your colleague in a personal email.

Be aware that emails sent by the platform may land in a spam folder. A personal email has a higher chance to reach the user.

The password generated by the platform are temporary and can only be used once.
The user will be prompted to change his/her temporary password upon first login.

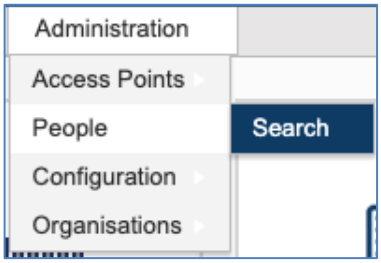
10. Reactivating a user account

It may happen that a user account has been deactivated.
Possible reasons for this are:

- repeated failure to log in
- expired password (passwords must be changed every 180 days; the platform prompts users upon login to change their passwords before it expires).
- more than 30 days of inactivity after the last temporary password was received.

Deactivated accounts are easily be identified in the hierarchy structure by a symbol in front of the person's name.

To reactivate an account, search the person under **Administration = > People = > Search**



lick on **view (NOT edit)** next to the correct user.

Then you open the person's profile click "reactivate" in the top right corner.

Once you have reactivated an account, you must **reset the password**. This is mandatory when you reactivate an account.

You may wish to ensure the user remembers his/her username in case of a blocked account. This could be the reason for repeated login failure and subsequent account deactivation.

Please remember that for security reasons usernames and passwords must not be sent in the same email or message unless a secure email technology is used.

11. Contact us

If you have questions or need help, do not hesitate to contact us.

Hotline	+41 77 500 34 66
Email	siris-spine@eurospine.org
More info	www.siris-implant.ch