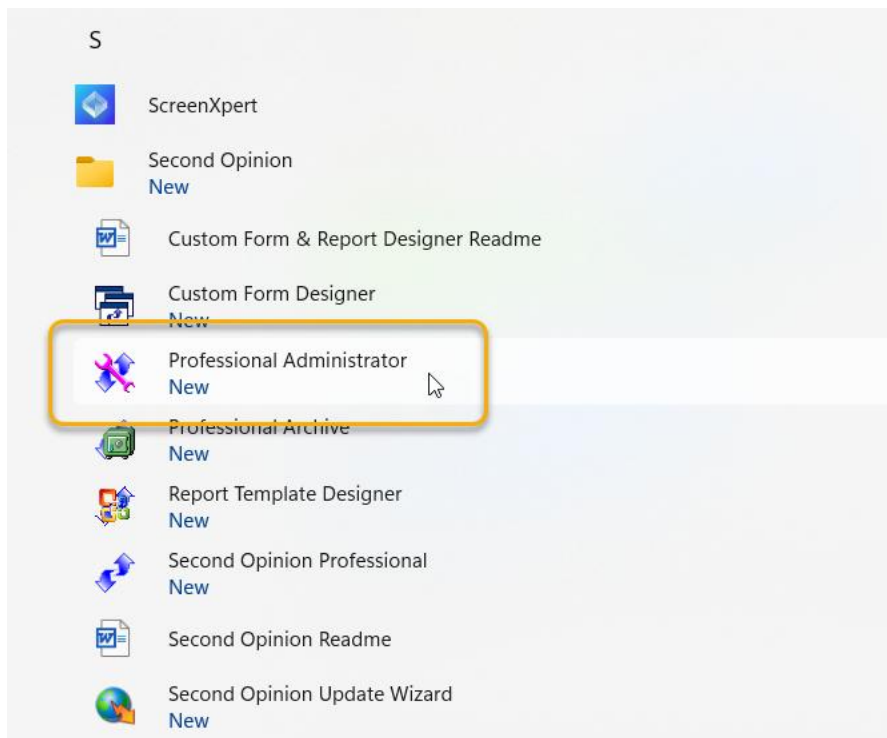




Second Opinion Professional

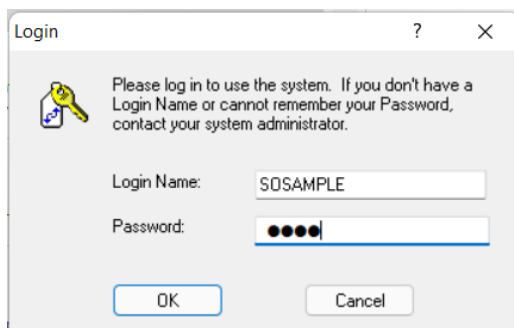
How to Create New Users

This document is designed to be a hands-on tutorial on how to Create and Manage Second Opinion Professional Users. This is done using the Professional Administrator program located in the Second Opinion Section of All Programs on your computer.



Professional Administrator Program

Run the Professional Administrator program using an account that has Administrator privileges. If you are setting up a new system, the default username is SOSAMPLE with the password 1234.

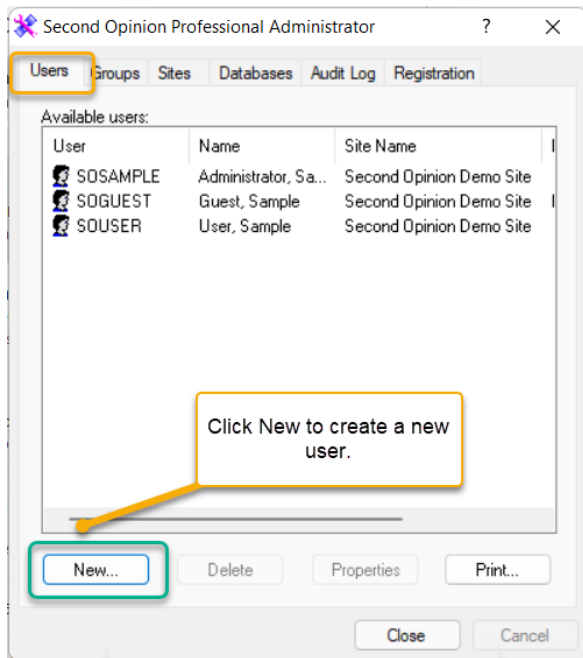




Create New User

Once logged in, the Users tab will be selected.

To Create a New User, **Click the New** button at the bottom.



Fill in the appropriate fields. The Login, First and Last Names are mandatory. The Full Name is used in the Logs to identify the User activities. When done **Click Next**.

A screenshot of the "New User" form. The form contains several fields: "Login Name:" with the value "MSMITH" (highlighted with a green box), "First name:" with the value "Mary", "Middle initial:" (empty), "Last name:" with the value "Smith", "Generational qualifier:" (empty dropdown), "Title:" (empty), "Degrees:" (empty), "Full name:" with the value "Smith, Mary" (highlighted with a green box), "Position:" (empty), "Department:" (empty dropdown), and "Description:" (empty). At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a green box), and "Cancel".

Note: When you add a value to the drop-down fields, like "general qualifier" and "department," and complete the rest of the steps to save the user, the value will be saved as an option for the next user being created.



Most installations have a single site defined, choose the Site and **Click Next**.

A screenshot of the 'New User Location' dialog box. At the top, it says 'Site user is associated with:' followed by a dropdown menu showing 'Second Opinion Demo Site (Id=D9900001)'. Below this is a section titled 'Site Information' which is currently empty. An orange callout box with a pointer to the dropdown menu contains the text 'Select default site of the User.' At the bottom of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a green rectangular border.

The User's Voice, Fax, and Email information is not used in the program, so these fields can be ignored. **Click Next.**

A screenshot of the 'New User Contact Information' dialog box. It contains three sections: 'Voice' with fields for 'Area/city code:', 'Number:', and 'Extension:'; 'Fax' with fields for 'Area/city code:' and 'Number:'; and 'Email:' with a single text field. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a green rectangular border.



Type in and confirm the Password and set the Audit Level to Use system settings. Click Next.

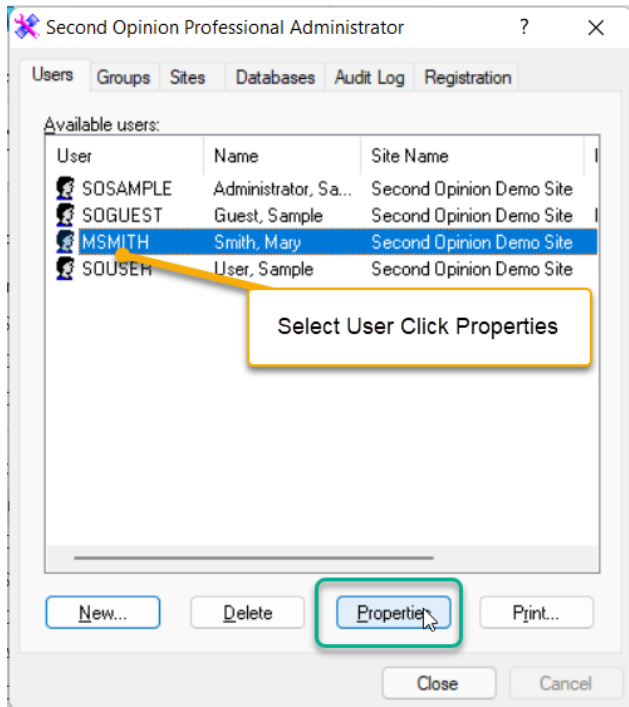
A screenshot of the 'New User Security' dialog box. It contains fields for 'Password' and 'Confirm password', both with masked characters. Below these are checkboxes for 'Account has expiration date' and 'Force periodic password change', with associated date fields. The 'Audit Level' section has four radio button options: 'Use system setting' (selected), 'Track Login/Logout', 'Track creation and deletion of records', and 'Track any record changes'. At the bottom are '< Back', 'Next >', and 'Cancel' buttons. Red boxes highlight the password fields, the 'Use system setting' radio button, and the 'Next >' button.

Choose the security Group the User belongs to and Click Finish. Refer to the Configuring and Managing Your Second Opinion Professional Manual to see the rights of each predefined user group.

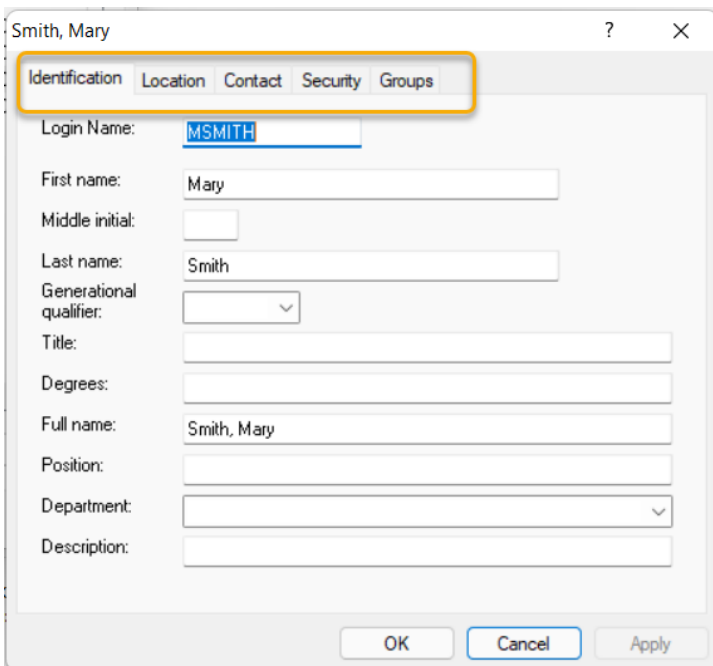
A screenshot of the 'New User Groups' dialog box. It features a table titled 'Select the groups this user belongs to:' with columns for 'Group', 'Description', and 'Departme'. The 'ADMINISTRATORS' group is selected with a checkbox. Below this table is a section titled 'User has these rights:' containing a table with 'Right' and 'Description' columns, showing the 'Administrator' right. At the bottom are '< Back', 'Finish', and 'Cancel' buttons. Red boxes highlight the 'ADMINISTRATORS' group in the table and the 'Finish' button.

Modify User

To Modify an existing User account, Select the User from the list and **Click Properties**.



Click on the desired **Tab**, edit the information, and **Click OK** to save when finished.



The screenshot shows the 'Smith, Mary' user properties dialog box. The 'Identification' tab is selected and highlighted with a red box. The fields are as follows:

- Login Name: MSMTIH (highlighted with a red box)
- First name: Mary
- Middle initial:
- Last name: Smith
- Generational qualifier:
- Title:
- Degrees:
- Full name: Smith, Mary
- Position:
- Department:
- Description:

At the bottom are 'OK', 'Cancel', and 'Apply' buttons.



Administrator Guide

For more detailed information regarding the Professional Administrator program please refer to the document, Configuring and Managing Your Second Opinion Professional.

For More Information or Technical Support, Give Us a Call

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