

Navigating in the Portal and Creating Administrators

Objectives

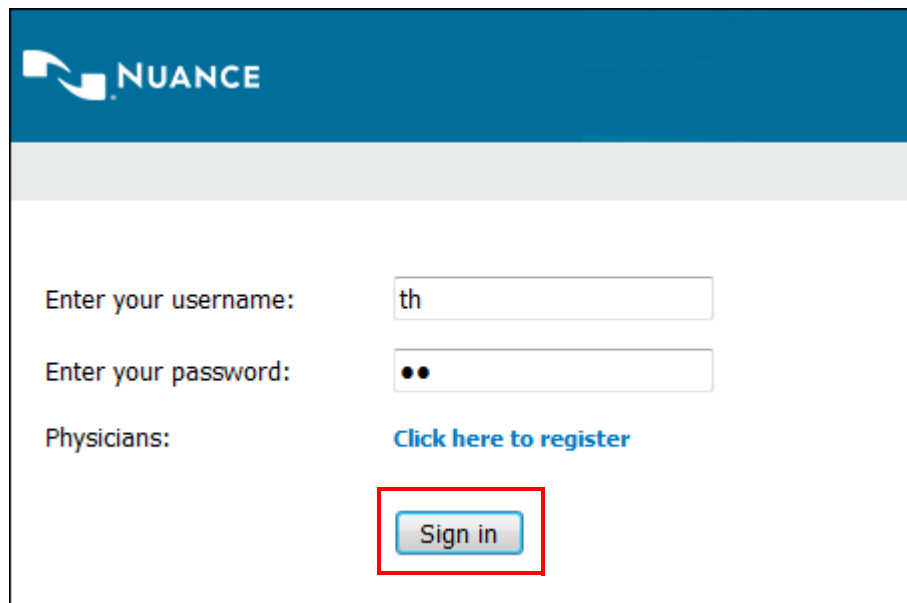
In this chapter you will:

- Demonstrate logging in and navigating in the Administrator Portal.
- Describe the purposes of administrator users.
- Demonstrate creating an administrator.

Logging in to the Portal

To log in:

1. Open Internet Explorer and type the following URL:
<http://<PowerScribe 360 server name>/radportal/login.aspx>
(Replace <**PowerScribe 360 server name**> with the name of the server where the *PowerScribe 360 Reporting Portal* is installed.)
2. Type your username. (The default administrator username is **admin**.)
3. Type your password. (The default administrator password is **nuance**.) At your first login, you are required to change your password. Follow the prompts to change the password, and then continue.
4. Click **Sign in**.



Notes:

- As a security precaution, the **Sign in** window reappears if the system is idle for an extended period of time. Re-enter your user name and password to continue.
- For PowerScribe 360 Reporting Administrator Portal administrators, the session timeout period is 60 minutes; for security reasons, this setting cannot be changed in the Administrator Portal. For users who have been assigned roles, the default is 'never' and this preference can be changed for individual users or at the system level.
- For information about assigning roles to users, refer to [Roles on page 116](#).

Navigating in the Administrator Portal

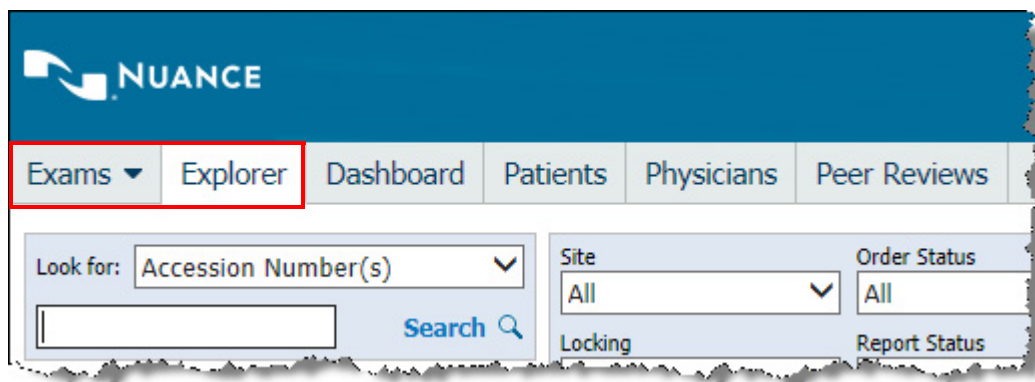
This section assumes that you are an administrator authorized to log into the Administrator Portal. Other users see other portals upon logging in.

Logging In for the First Time

The very first time you sign in to the **Portal** as an administrator, you see the **Explorer** tab of the **Exams** group.

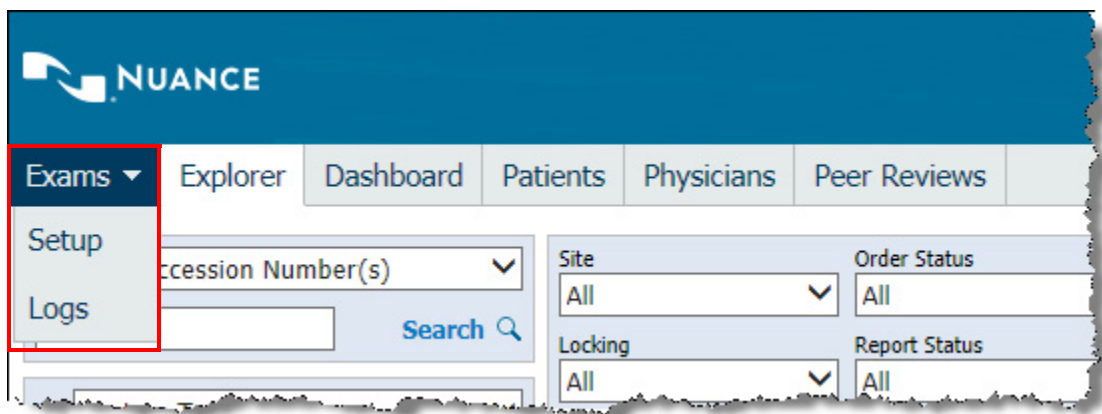


Note: On all subsequent logins, you return to the group and tab on which you last worked.



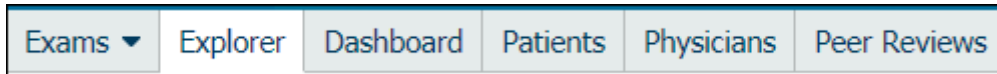
Choosing a Group

The **Administrator Portal** is divided into three main *groups*: **Exams**, **Setup**, and **Logs**. To select a different group, move your mouse cursor over the current group heading, located at the far left of the menu bar. The group list opens, allowing you to select a new group. The following illustration shows the Administrator Portal's groups with the **Exams** group selected.



Overview of the Administrator Portal and Its Groups

Exams Group



The **Exams** group contains the following menu tabs:

- **Explorer:** Provides access to all the orders and reports in the system. From this page, you can search for reports based on criteria such as patient name, MRN, or accession number; view and print reports; and take specific actions on reports, such as resetting a report's priority, editing diagnosis codes, or changing the patient MRN. In addition, you can associate or dissociate multiple orders with a report, and view the audit trail for a selected order or report. Refer to *Speech Configuration Options, beginning on page 180*.
- **Dashboard:** Provides a real-time view of activity in the system. You can see all users logged in to the system, the activity they are performing, and recent messages sent to and received from the RIS.
- **Patients:** Provides access to all the patient information in the system. You can search for patients, and modify their demographic, visit, and insurance information.
- **Physicians:** Provides access to all the referring physicians in the system. You can search for referring physicians and modify their demographic and insurance information. *Creating a Physician Account, beginning on page 123 and Modifying a Physician Account, beginning on page 125.*



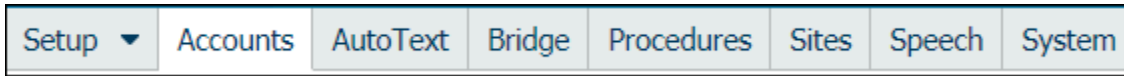
Caution: Do not use the **Physicians** tab for creating radiologist accounts for dictation. Use the **Accounts** tab in the **Setup** group for creating dictation users. In addition, do not use the **Physicians** tab to create accounts for access to the Administrator Portal; use the **Accounts** tab in the **Setup** group for these accounts as well.

- **Peer Reviews:** Allows you to view reports and edit existing peer review ratings.



Note: Peer Review is a purchasable feature. Contact your Nuance account executive for more information.

Setup Group



The **Setup** group contains the following menu tabs:

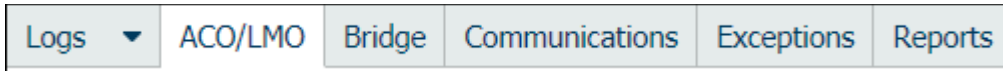
- **Accounts:** Provides access to all user accounts in the system. Here you can search for specific accounts, modify the properties of existing accounts (including user preferences), create new accounts, and perform other account activities.
- **AutoText:** Provides access to all AutoText entries (also referred to as macros, templates, or shortcuts) used in the system. You can search for AutoText containing specific text, modify AutoText, import AutoText entries, and perform other tasks.
- **Bridge:** Defines the settings of the RIS interface, and allows you to start and stop the service.



Caution: Do not make changes to the **Bridge** tab unless Nuance technical support has advised you to do so.

- **Procedures:** Allows you to manage your organization's procedure information. From here you can import and export your site's Procedure Master Translator (formerly known as the ChargeMaster), categorize procedure codes by anatomy and modality, and perform other tasks.
- **Sites:** Your system might have a single site, or multiple sites. A site is typically mapped to an RIS or HIS; orders are unique within a site. All the accession numbers and MRNs within a site are unique. On the **Sites** tab you can manage site-level preferences.
- **Speech:** On this tab you can set default values for the system, assign the default acoustic model and language model, set up system-wide formatting options, see which workstations have updated their formatting options and when the updates occurred; and manage custom words. (Note that all of these settings can be changed for individual providers.)
- **System:** Use this tab to configure system-wide preferences. Preferences you set at the site or account level will override those at the system level. You can also use the **System** tab to import providers and accounts with roles into the system, and add insurance information. To set system preferences and other settings, refer to *Configuring the System, beginning on page 23*.

Logs Group

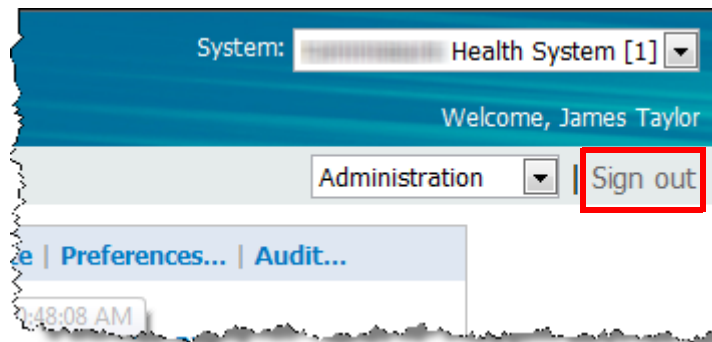


The **Logs** group contains the following menu tabs:

- **ACO/LMO:** View events that occurred on the speech server during acoustic or language model optimization.
- **Bridge:** View events that occurred on the bridge service. You can export the events to an *.xml* file for further analysis.
- **Communications:** View communications from *PowerScribe 360 Reporting* for fax, email, critical findings (*PowerScribe 360 Critical Results*), and support requests.
- **Exceptions:** This is where most system errors are logged. You can search for errors on specific criteria, and then use the information for troubleshooting.
- **Reports:** View statistical reports designed to help administrators. Reports provide detailed information on turnaround times, provider and transcriptionist productivity, use of AutoText, and many other aspects of system activity. (Note that if the reporting package has not been installed on your system, this tab is named **Statistics**.)

Signing Out of the Administrator Portal

When finished working in the **Portal** click the **Sign out** link (located in the upper-right portion of the menu bar) to return to the sign-in window, or just close your browser.



Creating Administrator Accounts

In the *PowerScribe 360 Reporting* system, administrators are users who have been granted some or all of the administrator rights. An administrator might also be a user who has been assigned to a specific role in the *PowerScribe 360 Reporting* system.

You can configure a user as either a *system* administrator or a *site* administrator. A system administrator has access to all sites in the system. Create a site administrator if you want to limit the user's administrative rights to specific sites. Both administrator types contain the same set of privileges from which you can select.

Administrators cannot edit their own administrative rights. If there is a need for an administrator's rights to be modified, another administrator must edit the account.

Searching for an Administrator Account

To perform a filter search:

1. Select **Administrator** from the **Authorization** drop-down list.
2. If desired, use one or both of the following criteria:
 - Select a **Site** to find administrators at a particular site in the system.
 - Select an option from the **Status** drop-down list to search for administrators by logon status, or whether the account is active or inactive.
3. Click **Search**. Any administrators who meet your criteria appear in the list.

To search with the Look for field:

1. In the **Look for** field, select **Last Name**, **First Name**, **Email**, **Identifier**, or **Username**.
2. Enter all or part of the text for which you want to search.



Tip: In the **Look for** text field, you can use an asterisk (*) as a wild-card character. For example, if you do not know the exact last name of an administrator but you know the name ends in the letters MAN, type ***man** and click **Search**.



***Note:** In order to search using a partial name, you must include the asterisk (*) wild-card character. Using the previous example of MAN without the wild-card character, the search would have failed to return anything unless someone actually had the last name of MAN.*

3. Click **Search**. Any users who meet your criteria appear in the list.

To search for an administrator using the alphabet links:

1. Select **Administrator** from the **Authorization** drop-down list.
2. Use the **A** through **Z** links to display accounts with last names beginning with a particular letter.

Click **Reset** to return all search fields (**Site**, **Authorization**, **Status**, and **Look for**) to their defaults.

Creating an Administrator Account

To create an administrator account:

1. In the **Setup** group, click the **Accounts** tab. The left side of the window lists all the users in the system, and the right side displays a form you can use to create a new user.



***Note:** If a user's information already appears on the right, click **Clear**. **Clear** simply removes the data from the window; it does **not** delete the user from the system.*

2. Enter a **Username** (not case sensitive) and **Password** (case sensitive) for the user.



***Tip:** If your system is configured to require users to change their passwords at their first login (that is, if the **Setup > System > Preferences > Security tab > Forced password change interval** preference is set to anything other than **Never**), consider creating a basic password for all users to use at first, allowing each user change to a more secure one at first login.*

3. Enter a **First** name and a **Last** name for the user.



***Note:** The field names labeled in **bold** text (**Username**; **Password**; **First**; and **Last**) are required fields. All other fields are optional.*

4. Select the **Administrator** check box.

The screenshot shows a web form for creating a user. At the top, there are tabs for 'Speech', 'System', and 'Administration'. Below the tabs is a navigation bar with links: 'Save Changes', 'Clear', 'Delete', 'Password', 'Deactivate', 'Preferences...', and 'Audit...'. The main form fields are:

- Username:** 'talba' (highlighted with a red box)
- Administrator:** (highlighted with a red box)
- Bypass LDAP:**
- Edit Rights...:** (highlighted with a red box)
- Name:** Fields for Prefix, **First** (Tracy, highlighted with a red box), Middle, **Last** (Alba, highlighted with a red box), Suffix, and Degree.
- ID:** Fields for SSN, Alternate, ACR, Critical Results (71230), and NPI.
- Fields for E-mail, IM, and Fax are partially visible at the bottom.

5. **Optional:** Fill in the **ID**, **Contact**, and **Address** information for the user.
6. Click the **Create New** link to save the user account. (The Create New link changes to **Save Changes**.) You can now edit the administrator's rights.
7. Click the **Edit Rights** link, to the right of the **Administrator** check box. The **Administrative Rights** dialog box opens
By default, the **System Administrator** user type is selected.

The screenshot shows a dialog box titled 'Administrative Rights -- Webpage Dialog'. At the top, it displays 'Account: Tracy Alba' and buttons for 'Save and Close' and 'Close Window'. Below this, there are two radio button options:

- System Administrator** (highlighted with a red box)
- Site Administrator


 Underneath, there are two main options for access:

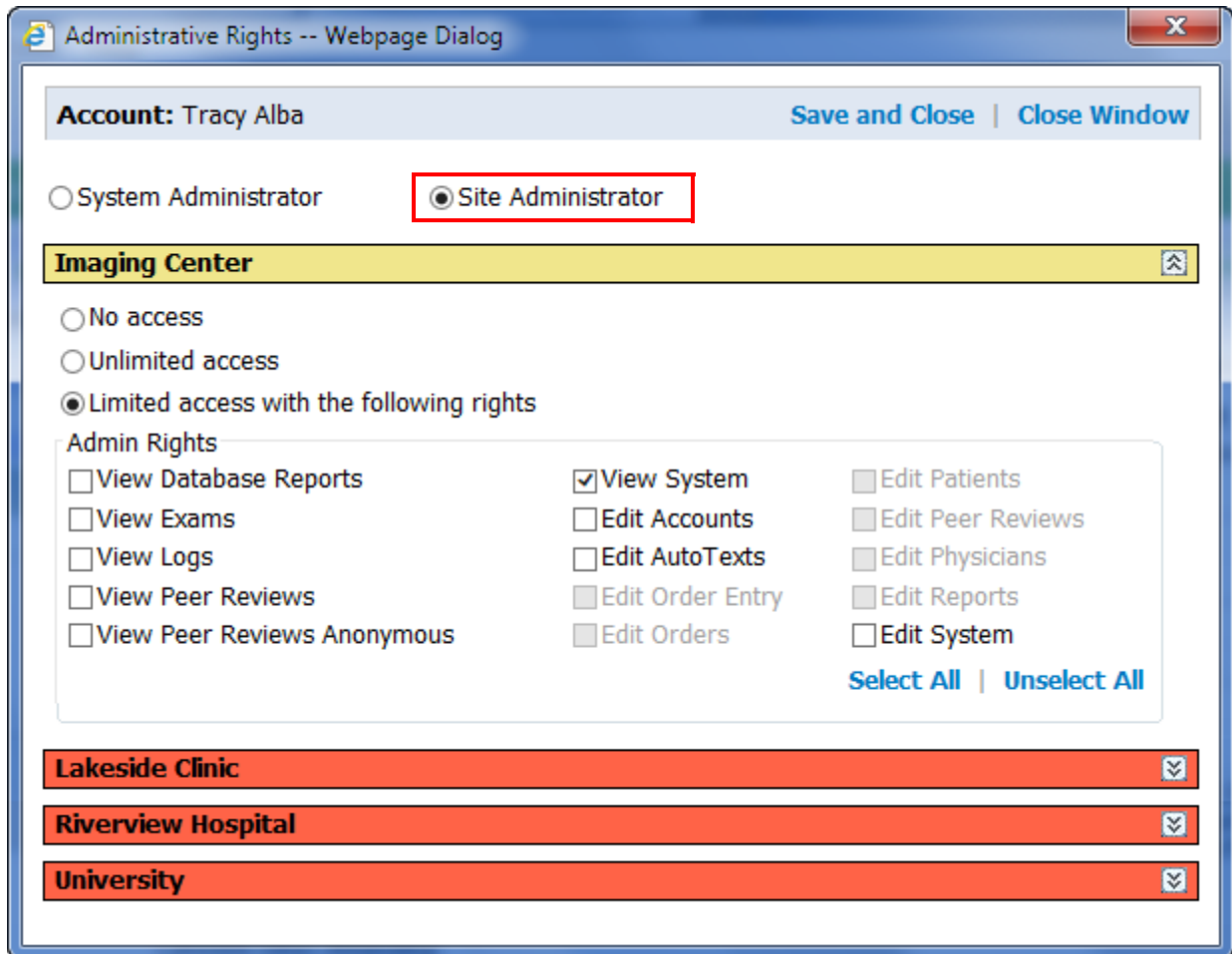
- Unlimited access
- Limited access with the following rights

 A section titled 'Admin Rights' contains a list of checkboxes:

- View Database Reports
- View Exams
- View Logs
- View Peer Reviews
- View Peer Reviews Anonymous
- View System
- Edit Accounts
- Edit AutoTexts
- Edit Order Entry
- Edit Orders
- Edit Patients
- Edit Peer Reviews
- Edit Physicians
- Edit Reports
- Edit System
- Edit WorkLists

 At the bottom right, there are buttons for 'Select All' and 'Unselect All'.

To create a site administrator, click the **Site Administrator** button and open the site you want to configure by clicking the open icon  at the far right side of the site name. In the illustration below, the Imaging Center site is open for editing. Lakeside Clinic, Riverview Hospital, and University are available for configuration as well. Initially, **No access** is selected for all sites to prevent unintended access.





Note: For *View Exams*, *View Peer Reviews*, and *View System*, you must first select the *View* right before the *Edit* rights become available. For example, when you select *View System*, the *Edit Accounts*, *Edit AutoTexts*, *Edit System*, and *Edit Worklists* selections become available. In other words, you must have *View* rights before you can have *Edit* rights. This applies to both *System* and *Site* administrator accounts.

- To limit an administrator’s rights, select the **Limited access with the following rights** option. Note that the rights fall into two categories: **View** rights and **Edit** rights. Refer to the table below to select the user’s rights.

Admin Right	Function
View Rights	
View Database Reports	Allows access to Reporting Services.
View Exams	Allows read-only access to Explorer, Dashboard, Patients, and Physician pages.
View Logs	Allows read-only access to Communications, Exceptions, Statistics, Bridge, and ACO/LMO pages.
View Peer Reviews	Allows read-only access to Peer Reviews page.
View Peer Reviews Anonymous	Allows read-only access to Peer Reviews page, prevents display of radiologist names (reviewers and reviewees) and disables report preview, unless the user has the View Exams right. In the latter case, the report data are available, but not the reviewer.
View System	Allows read-only access to System, Sites, Bridge, Accounts, Speech, and AutoText pages.

Admin Right	Function
Edit Rights	
Edit Accounts	<p>Allows managing user accounts. (You must first select the View System right.)</p> <p><i>Note: Only system administrators can edit Accounts; site administrators have view-only rights.</i></p>
Edit AutoTexts	<p>Allows managing site and account AutoText. (You must first select the View System right.)</p> <p><i>Note: Only system administrators can edit AutoText; site administrators have only view and export rights.</i></p>
Edit Order Entry	<p>Allows managing order entry requests, including authorization. (You must first select the View Exams right.)</p>
Edit Orders	<p>Allows editing order properties (for example, priority) and metadata that are order-related, like custom fields. It also allows deleting unreported orders and unlocking orders. (You must first select the View Exams right.)</p>
Edit Patients	<p>Allows editing patient data. (You must first select the View Exams right.)</p>
Edit Peer Reviews	<p>Allows managing peer reviews, including verifications and transmissions to the ACR. (You must first select the View Peer Reviews right.)</p>
Edit Physicians	<p>Allows editing physician data. (You must first select the View Exams right.)</p>
Edit Reports	<p>Allows editing report properties (for example, resetting the status to Draft or associating/dissociating orders to or from a report) and metadata that are report-related, like diagnosis (ICD-9) codes. It also allows changing or resetting the radiologist and transcriber of a report, assigning orders to radiologists, deleting a report, and holding/resending a report. (You must first select the View Exams right.)</p>
Edit System	<p>Allows editing global system, site and Bridge properties, preferences, and general configuration. Allows access to the Speech tab in the Setup group. (You must first select the View System right for the administrator to use this right.)</p> <p><i>Note: Only system administrators can edit system-level items; site administrators do not see the System tab at all. However, site administrators can add and manage items on the Bridge tab.</i></p>
Edit Worklists	<p>Allows creating and editing worklists. (You must first select the View System right.)</p> <p><i>Note: Only system administrators can edit worklists; since worklists appear on the System tab, they are not available to site administrators.</i></p>

To give the administrator full rights, select the **Unlimited access to all system functions** option. This option gives the user all the rights shown in the **Admin Rights** group box below, as well as any other administrative rights. Select this option if you want no limits to this user's rights.



Caution: *It is recommended that you **not** select this option, but assign administrators only the specific rights they need.*

9. When finished, click **Save and Close**.

Practical Exercise

Test your work: Log out of the Portal, and log back in as the new administrator user you just created.

