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# Managing Users

## User Guide

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# 1. What is The Purpose

This User Guide will assist in adding and deactivating administrative users (e.g. site director) of your OnCare system. To learn more about adding staff members to the system, refer to Staff Record User Guide. OnCare allows you to add unlimited number of users to access your OnCare Office account. To add users, you must login to the system under "Company Super User" role which is created for you by OnCare when the account is first setup. Please follow the steps below to add new users to access OnCare.

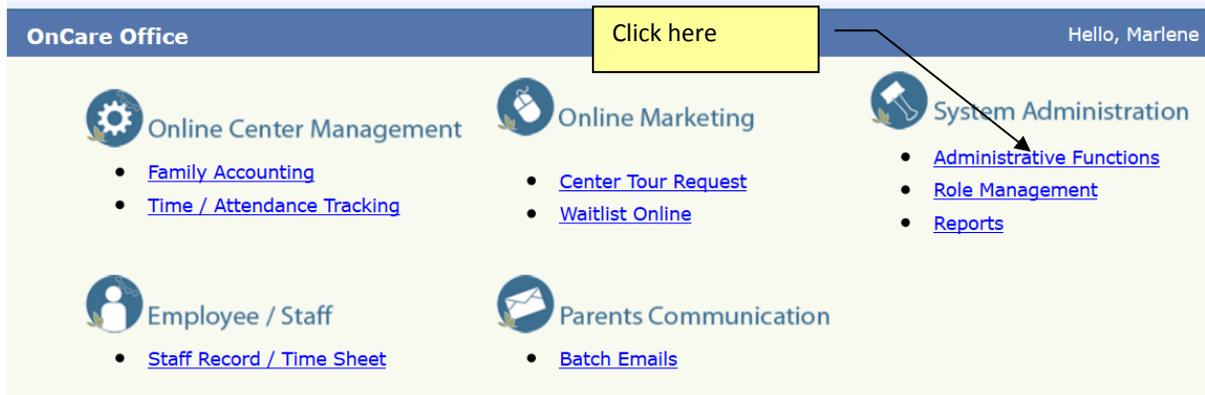
# 2. Related Role Management

OnCare is a role based system, meaning each user must be assigned to a user role which control their access right. OnCare comes with a list of default user roles. In addition to the default roles, you can also add new roles for your company needs.

See Role Management User Guide for additional information on how to manage the roles in OnCare.

# 3. Add New User

The designated Company Super User will receive an email from OnCare with your login credential. After logging in as the Company Super User click on the Administrative Functions on the OnCare Office home page.



**Administrative Functions**

**Manage Users**

- [Manage Users](#)

**Family Accounting**

- [Search Across Centers](#)
- [Add /Edit GL Account](#)
- [Edit Billing Setup](#)

Click Manage Users

User Management

[Back](#)

**Add New User**

User Search

First Name

Last Name

User Name

Status

Role Name

Location Name

**Search**

Select Add New User

User Management

[Back](#)

\* First Name

\* Last Name

\* Username

\* Password

Password Strength Meter **Secure**

\* Re-enter Password

\* Email

\* Company Name

\* Status

\* Role Name

- Select here
- Company Admin
- Location Director

**Save**

Use email as the Username

Assign appropriate user role

After you have added the required user information and click "Save," the new user will be added to the system. You must notify the new user about their OnCare login credential.

## 4. Staff User - Do Not Add via Manage Users

Within OnCare, you can setup login for each staff member at your center.

**Important Note:** The regular staff login (as opposed to non-staff user like Center Director) login is created within the Staff Record module, NOT under Manage Users as explained above.

Please refer to the Staff Record User Guide section 5 for more information.

The screenshot shows the OnCare Office dashboard with a blue header bar containing "OnCare Office" on the left and "Hello, Marlene" on the right. The main content area is divided into five modules, each with a circular icon and a list of sub-links:

- Online Center Management** (gear icon):
  - [Family Accounting](#)
  - [Time / Attendance Tracking](#)
- Online Marketing** (mouse icon):
  - [Center Tour Request](#)
  - [Waitlist Online](#)
- System Administration** (wrench icon):
  - [Administrative Functions](#)
  - [Role Management](#)
  - [Reports](#)
- Employee / Staff** (person icon):
  - [Staff Record / Time Sheet](#)
- Parents Communication** (envelope icon):
  - [Batch Emails](#)

A yellow callout box with a black border and an arrow pointing to the "Staff Record / Time Sheet" link contains the text: "Setup Staff login via the Staff Record module, NOT by adding new users as explained above."

## 5. Deactivate A User

When an OnCare user leaves your company/center, you can block that user from accessing your OnCare account by deactivating the user. To deactivate, click on the Search button to get a list of users for your company.

### User Search

First Name   
Last Name   
User Name   
Status

Role Name   
Location Name

Click Search button

Search

### Search Results

Name	Username	Role	Company Name	Location Name	Status	Action
Alan Bell	alanbell	Company Admin	OnCare - System Evaluation Account	All Locations	Active	<a href="#">Edit</a>
Robynn Brown	robbynbrown888@gmail.com	Location Director	OnCare - System Evaluation Account	101 - OnCare Evaluation Center 1	Active	<a href="#">Edit</a>
Samaya Priya	samaya_demo	Company Admin	OnCare - System Evaluation Account	All Locations	Active	<a href="#">Edit</a>
Sriram OnCare	sriram_demo2	Company Admin	OnCare - System Evaluation Account	All Locations	Active	<a href="#">Edit</a>
Swami Test	swami_director	Location Director	OnCare - System Evaluation Account	101 - OnCare Evaluation Center 1	Active	<a href="#">Edit</a>

Select Edit for the staff you want to deactivate

After clicking Edit, you will see the individual's record. In the drop down menu of the Status section, change the status of the user from Active to Inactive. Click Save to complete the deactivation.

The screenshot displays a 'User Management' interface with the following fields and values:

- First Name:** Swami
- Last Name:** Test
- Username:** swami\_director
- Password:** \*\*\*\*\* (with a [Change Password](#) link)
- Email:** swami\_1@oncare3.com
- Company Name:** OnCare - System Evaluation Acc
- Status:** InActive (highlighted with a yellow box and an arrow)
- Role Name:** Location Director
- Location Assignment:** 101 - OnCare Evaluation Center

A **Save** button is located at the bottom center of the form.