

# User Management in TotalABA

## Contents

Summary .....	1
Managing Users .....	2
Viewing a List of Users .....	2
Creating a New User .....	2
Permission Sets .....	3
Modifying a User.....	4
Sending a Reset Password Link.....	4
Deactivating a User .....	4
Freezing a User Account .....	4
Managing User Licenses.....	5
Checking for Available Licenses .....	5
Requesting New Licenses.....	5
Managing Existing Service Orders.....	5
Screen Shots.....	6
Frequently Asked Questions .....	7
How do I know if there are any available user licenses? .....	7
What should I do if there are not any available licenses? .....	7
What is the difference between a staff member and a user? .....	7
How do I know what settings/permissions should be given to a user?.....	7
What happens when a user is deactivated? .....	7
How do I know when a user has logged into TotalABA? .....	7
Why would the Email and Username ever be different? .....	7
Why is there a separate setting for Create/Modify Students on the user record?.....	8

## Summary

Authorized users in your organization are able to create, modify, deactivate, send reset password links, and request new user licenses in TotalABA. Please contact [support@inviscidsoftware.com](mailto:support@inviscidsoftware.com) to make any changes to the authorized users or if you have any questions.

# Managing Users

## Viewing a List of Users

To view a list of all users in your organization you need to go to the Administration Setup of TotalABA. There are several different ways to get to this.

1. Depending on your site click on your name in the upper right of the application and choose Setup or click the Setup link in the upper right of the application.
  - a. Click on Administration Setup or Administer
  - b. Click Manage Users
  - c. Click Users
2. In the collapsible left pane, click Support
  - a. Go the Service Orders tab
  - b. Click the Manage Users link
3. You can also open an individual user by going to their staff member record and clicking on the User link.

## Creating a New User

The following fields should be entered when creating a new user in TotalABA. All other fields should be left to their default values. Whenever a new user is created a corresponding staff member record is also created.

- **First Name** – Enter the first name of the new user
- **Last Name** – Enter the last name of the new user
- **Alias** – This will automatically be set to the first initial of the first name followed by the first four characters of the last name.
- **Email** – This is the email address of the user. All correspondence from TotalABA will be sent to this email including: new password (initial activation), reset password link, forgot your password, appointment notifications, etc.
- **Username** – The user name will automatically default to the email. However, it can be changed to another value and it must be in an email format. Furthermore, the Username must be unique across all Salesforce organizations.
- **Nickname** – This will default to
- **Role** – This will always be TotalABA User
- **User License** – This will always be Salesforce Platform
- **Profile** – This will always be one of the TotalABA User profiles. In most cases only TotalABA User will be available.
- **TotalABA License Type** – Select the correct license type for the user.
  - **Non-Therapist** – A non-therapist cannot be assigned to student (therapy) appointments nor can they be listed as the therapist on a session. This is typically used for administrators and office staff who do not provide direct services for the students.

- **Therapist** – This license type allows the user to be assigned to any scope of appointment and they can be listed as the therapist on a session.
- **Create/Modify Students** – This option controls if the user is able to create or modify students in TotalABA. Unchecking this option overrides any permission sets. For example, if the user's permission sets allow for students to be created/modified, but this option is not selected then the user will not be able to save any changes when creating/modifying a student. Alternatively, if this option is checked but the user does not have a permission set allow students to be created/modified, then they will be unable to make changes to the student.
- **Sign-Off Sessions** – If checked the user can sign-off on sessions.
- **Allow User to Be Scheduled** – This option indicates if the user can be assigned to an appointment. It does not control if the user can create/modify appointments.
- **Mass Delete Appointments** – If checked the user is able to perform bulk cancellations/deletions of appointments. These additional options are listed below. **We highly recommend that you do not give this option to users unless they are trained on how they work.**
  - Delete all appointments for the student
  - Delete all appointments for the assigned to (user)
  - Delete all appointments for a given date
- **Activate Treatment Plans** – If checked the user can change the status of a treatment plan to active. Only active treatment plans are may be used on a session.
- **Sign-Off Assessments** - If checked the user can sign-off on assessments.
- **Generate new password and notify user immediately** – Check this option if a new password setup/reset email should be automatically sent to the user once the record is saved. This is checked by default when creating a new user account. Uncheck it if you are creating the user account but do not want them logging into TotalABA yet (e.g. the user is being created before their start date so they can be added to the schedule). This is the same as clicking the Reset Password button when viewing the user account.

Once the new user has been created, apply the appropriate permission sets to the user account.

## Permission Sets

Permission sets control the record types the user is able to access in TotalABA. In most cases, users are able to view all record types and then are able to create, modify & delete certain record types. For example, a user may be able to view students but create sessions.

The permission sets may be assigned when viewing the user record. Go to the **Permission Set Assignments** section, click the Edit Assignments button and then add/remove the appropriate permission sets. Alternatively, you can open an individual permission set and click the Manage Assignments button to add/remove users from that permission set.

**It is recommended to use the same settings/permissions of an existing user when creating new users. If in doubt on what permissions to assign or what a permission actually does, please contact us at [support@inviscidsoftware.com](mailto:support@inviscidsoftware.com).**

Note: If a user is going to be creating new sessions, they must have a permission set that enables them to modify students. Otherwise an error will occur. However, you can prevent the user from actually creating/modifying students by deselecting the Create/Modify Students TotalABA Setting on the user account.

## Modifying a User

You can update all of the information on the user record that is also available when creating a new user.

If you just change the email for an existing user, they will be required to verify the new email via an automated link before the change takes effect. If the user has never logged in to TotalABA you can also check the **Generate new password and notify user immediately** option at the bottom of the user form when changing the email to bypass the verification.

The user is also able to update their name, email password, secret question/answer, etc. by clicking on their name in the upper right of TotalABA and choosing **My Settings** or **Setup**. Then select the appropriate link under **Personal** on the left side of the application. Note that a user cannot update their user name, this must be done by someone with user management privileges.

## Sending a Reset Password Link

If a user is having trouble logging in to TotalABA (forgot their password, never received the activation email), you can send them a reset password link by opening their user record and clicking the **Reset Password** button at the top of the form.

## Deactivating a User

To deactivate a user, simply open the user record, uncheck the Active field and save the record.

Deactivating a user in TotalABA results in the following:

- The user can no longer login to TotalABA.
- A license is available for a new user.
- The user can no longer be assigned to appointments, sessions, etc.
- The corresponding staff member record is deactivated.
- Open sessions where the user is listed as the therapist cannot be signed-off.

Note: If you reactive an existing user that was previously inactive you will need to manually set their corresponding staff member record to active as well.

## Freezing a User Account

Freezing a user account disables the ability for the user to login to TotalABA. However, their account remains active so that they can still be assigned to appointments/sessions and your practice can still sign-off on sessions where they are assigned. Unfortunately, Salesforce does not support the ability for you to freeze/unfreeze a user. If this is needed, please contact us at support@inviscidsoftware.com.

## Managing User Licenses

### Checking for Available Licenses

Your organization must have an available user license in order to create a new user in TotalABA. There are two ways to easily determine if there are any available licenses.

The recommended way is to go to the Service Orders tab on the support page (see figure 1) and click on the **Company Information** link. This will open a new browser tab. Check if there are any remaining Salesforce Platform licenses (see figure 2 for an example where 1 license is remaining). This will show how many new users can be added to your site.

The second way to determine if licenses are available is when creating a new user. If **Salesforce Platform** is not an available option for the User License field, then there are not any available licenses.

### Requesting New Licenses

If your organization requires new user licenses immediately or for a future date, then a new service order will need to be created and submitted. To create a new service order, go to the Service Orders tab on the support page (see figure 1) and click on the **Create New Service Order** link. The following information will need to be completed.

- **License Date** – Enter the date the new licenses should be available in your organization. Enter today's date if they should be ordered as soon as possible. Please be aware that it typically takes 1 to 2 business days for new licenses to be available in your site from the time you submit the order.
- **Therapist Licenses** – Enter the number of new therapist licenses that should be ordered.
- **Non-Therapist Licenses** – Enter the number of new non-therapist licenses that should be ordered.
- **Practice Comments** – This is optional and may be used for your own internal use.

Once the new service order has been saved it still needs to be submitted to Inviscid Software so the order may be placed. Simply click the **Submit** button at the top of the page, then enter your name and make your signature (using a mouse or a touchscreen) to automatically send the service order. Once the order has been submitted.

See Managing Existing Service Orders below for additional information.

### Managing Existing Service Orders

All existing service orders may be viewed by going to the Service Orders tab on the support page (see figure 1) and clicking on the **Manage Existing Service Orders** link.

Once a service order has been submitted, it may no longer be deleted. If the service order was submitted in error you may attempt to revoke the order by opening the order and clicking on the **Revoke** button. This will automatically send an email to Inviscid support requesting that the service

order not be completed. If Inviscid has not yet placed the order with Salesforce, then we will change the status of your service order to **Cancelled**.

Once the order has been placed with Salesforce, Inviscid will change the status of the service order to **Completed**. If the licenses were requested for the current date, then please allow 1 to 2 business days for the licenses to be available in your organization. If the licenses are requested for a future date, then they should be available on the morning of that date.

When viewing a service order, click the **Return to List** button to go back to the service orders list. An existing service order may also be printed if needed by clicking the **Print** button.

## Screen Shots

Figure 1 - Service Orders

User Licenses		Buy More Licenses		
Name	Status	Total Licenses	Used Licenses	Remaining Licenses
Salesforce	Active	2	2	0
Salesforce Platform	Active	194	193	1
Chatter Free	Active	5,000	0	5,000
Chatter External	Active	500	0	500

Figure 2 - Used & Available User Licenses

## Frequently Asked Questions

### How do I know if there are any available user licenses?

On the collapsible left pane, click the Support link, go to the Service Orders tab and click on the **Company Information** link. This will open a new browser tab. Check if there are any remaining Salesforce Platform licenses. This will show how many new users can be added to your site.

### What should I do if there are not any available licenses?

If there are not any available licenses you have two options. The first is to deactivate an existing user to free up a license. The second option is to submit a new service order.

### What is the difference between a staff member and a user?

All users in TotalABA will have a corresponding staff member record that are linked together. The user record contains all of the permissions/settings that control the level of access to TotalABA. The staff member record may be used internally by your organization to track additional information such as credentials, locations, code groups, etc. Furthermore, staff member records may be created for people in your organization that are not users. Please see the TotalABA Help documentation for more information on staff members -

<http://www.inviscidsoftware.com/trainingVids/Manuals/InviscidTotalABAHelp.pdf>.

### How do I know what settings/permissions should be given to a user?

The best way to setup the settings and permissions for a user is to use the same settings/permissions of an existing user. If in doubt on what permissions to assign or what a permission actually does, please contact us at support@inviscidsoftware.com.

### What happens when a user is deactivated?

Deactivating a user in TotalABA results in the following:

- The user can no longer login to TotalABA.
- A license is available for a new user.
- The user can no longer be assigned to appointments, sessions, etc.
- The corresponding staff member record is deactivated.

### How do I know when a user has logged into TotalABA?

On the user record and in the active users list there is a Last Login field that indicates the last date/time the user logged into TotalABA. If this value is blank, it indicates that the user has never logged in. You can also go to the Login History section on the individual user record to view more details.

### Why would the Email and Username ever be different?

The user name is what is entered when logging into TotalABA while the email is where all correspondence is sent (activation email, reset p/w emails, appointment notification emails, etc.). In most cases these will be the same. However, they may be different if the username has already been used in another Salesforce organization or if the email is ever updated without changing the username.

### Why is there a separate setting for Create/Modify Students on the user record?

This option controls if the user is able to create or modify students in TotalABA. Unchecking this option overrides any permission sets. For example, if the user's permission sets allow for students to be created/modified, but this option is not selected then the user will not be able to save any changes when creating/modifying a student. Alternatively, if this option is checked but the user does not have a permission set allow students to be created/modified, then they will be unable to make changes to the student.