MAYO CLINIC
LABORATORIES

Permissions Manager User's Guide

Release 1.13

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Introduction

Permissions Manager is a new functionality that makes it simpler and easier to manage user permissions for Mayo Clinic Laboratories across all your registered sites.

Select users at your site, called Client Administrators (CAs), manage these permissions across all sites to which the CAs have access. The Permissions Manager functionality gives CAs the flexibility to update permissions and make them effective immediately for any registered staff member, expediting user access and ultimately giving you a better overall client experience.

CAs can use Permissions Manager to:

- Add users to an account they have access to.
- Add or remove permissions, managing access to features for their users.
- Remove users from that account.

Permissions Manager now includes inactive accounts. Inactive accounts are generally no longer used for orders and results, but they may remain accessible for billing purposes to enable access to invoices.

Access

To receive CA access to Permissions Manager, work with your Regional Service Representative, Regional Service Specialist, or Lab Resource Coordinator; or contact Customer Service.

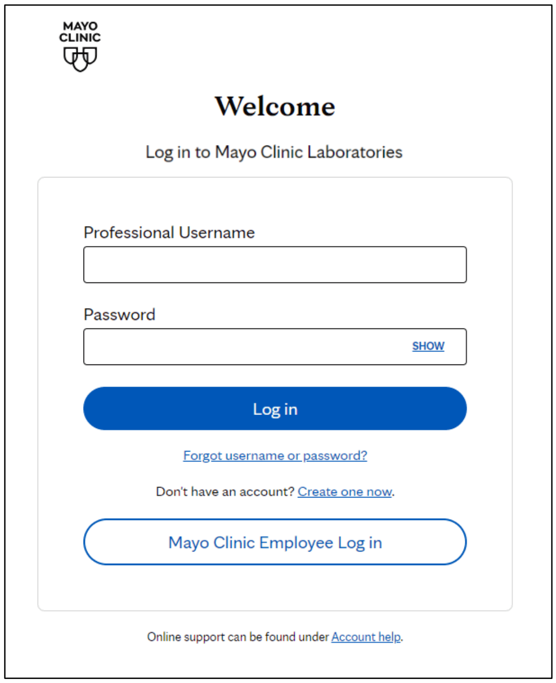
Note: Acceptable browsers include Chrome, Edge, Firefox, and Safari.

Logging into Permissions Manager

To access Permissions Manager once you have been granted CA access:

1. On MayoClinicLabs.com, at top right, click **My Dashboard**.

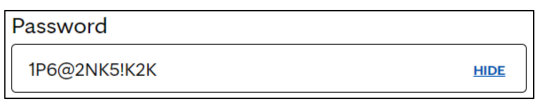
If you have not already logged in, the login window appears.



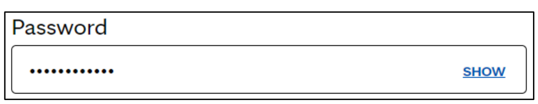
2. Enter your **Professional Username** (email address) and **Password.**

   Notes:

   - Passwords are case sensitive.
   - To help ensure you type your password correctly, you can click the **SHOW** link at the right end of the **Password** field. Your password becomes fully visible, and the link text changes to **HIDE**.

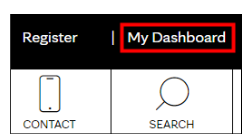
     

     To hide your password again, click the **HIDE** link. Your password is represented again by a series of dots, and the link text reverts to **SHOW**.

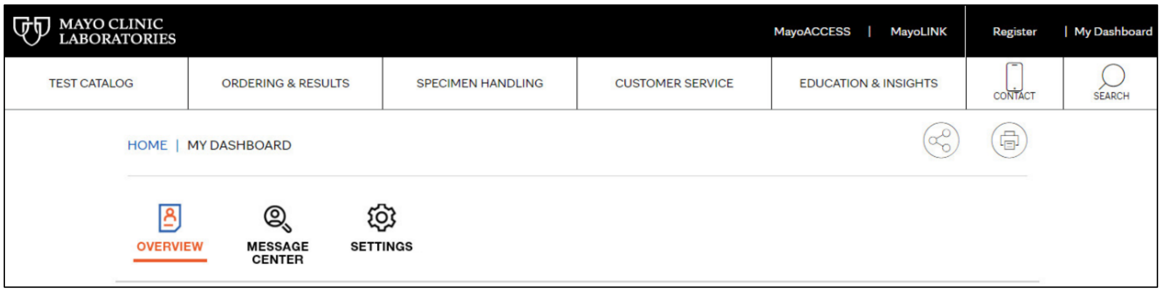
     

3. Click the **Log in** button. 

4. Once you have logged in, at top right, click **My Dashboard** (right).

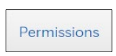


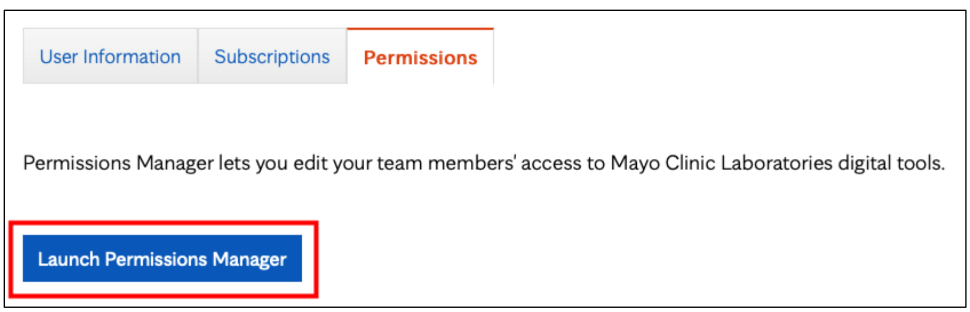
Your **Dashboard** appears.

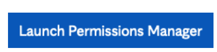


5. Click the **SETTINGS** icon (right). 

   The **SETTINGS** landing page appears, with the **User Information** tab selected by default.

6. Click the **Permissions** tab. 



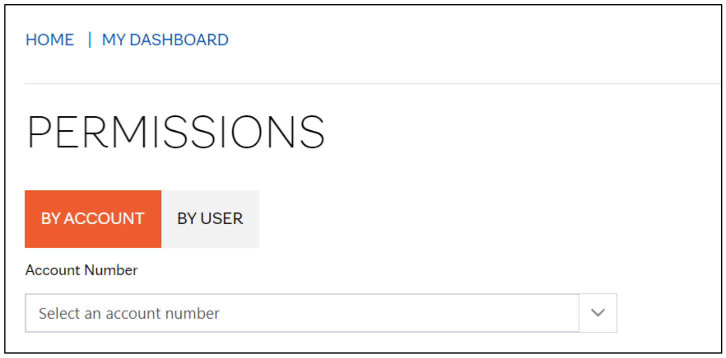
7. Click the **Launch Permissions Manager** button. 

Selecting accounts

In Permissions Manager, you can make changes for only one Mayo Clinic Laboratories account at a time.

First login

If this is your first time logging in to Permissions Manager and you have multiple accounts, you will be asked to select one account only.

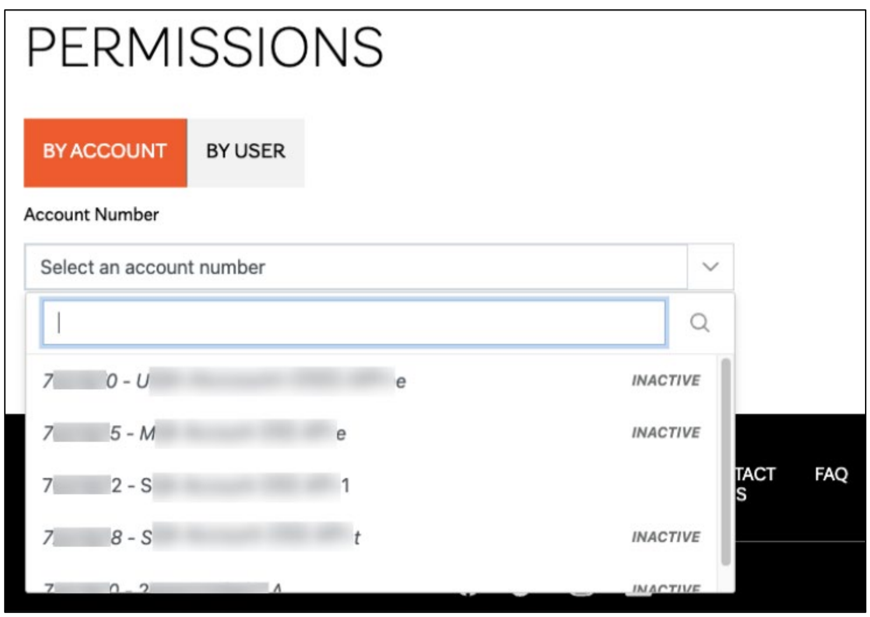


If you have access to multiple accounts:

1. Do one of the following:

   - Click the **Account Number** drop-down arrow.

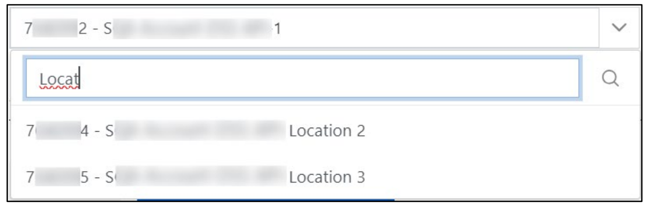
     A list of accounts to which you have access appears, specifying both the account numbers and names. Inactive accounts are in *italics*, and the word ***INACTIVE*** appears to the right of the name.



     Select the desired account.

     Once an account is selected, its name and number appear in the **Account Number** field.

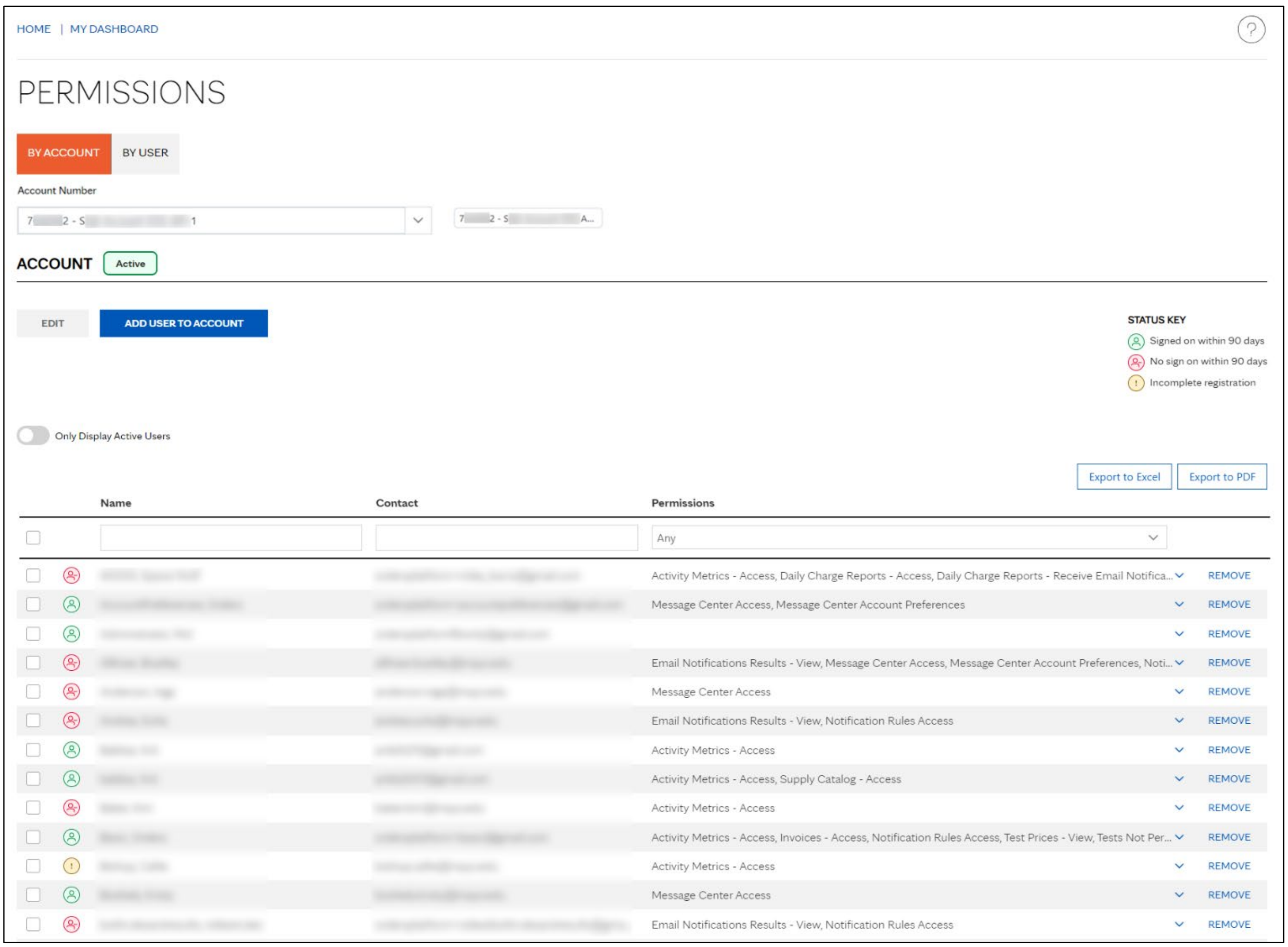
- In the **Account Number** field, begin to type any part of either an account number or name, and then select it from the autopopulated list below.



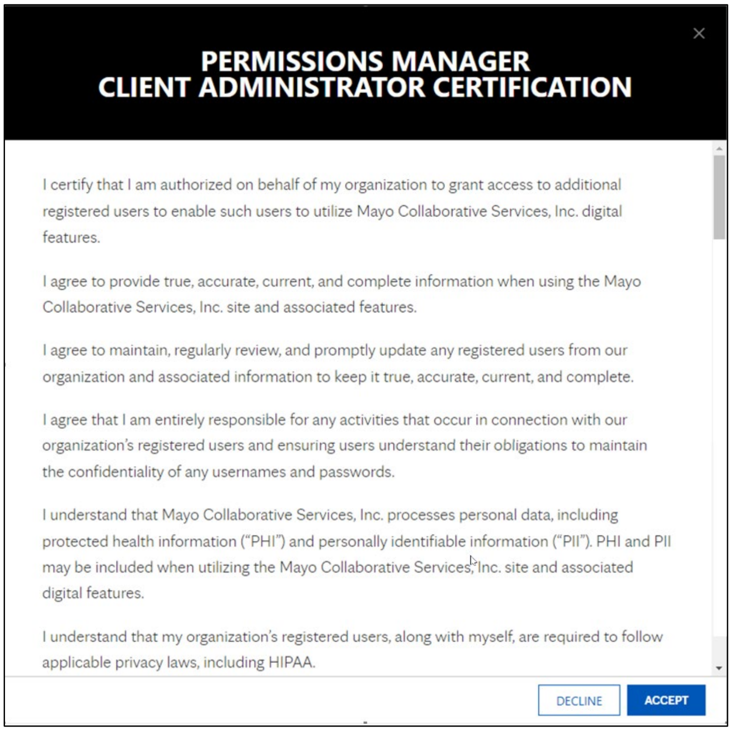
Once you have selected the desired account, click on the screen anywhere outside of the **Account Number** field.

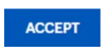
The full **PERMISSIONS** landing page appears as shown below.

If you have access to only one account, the full landing page appears as soon as you log in.



On your first login to Permissions Manager, the first time you attempt to save changes you have made, the following disclaimer pop-up appears, displaying the terms and conditions of use.

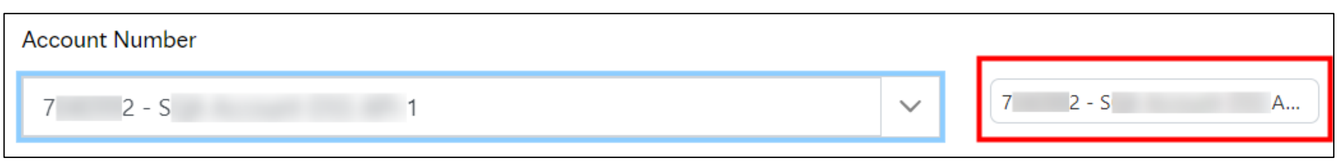


Click the **ACCEPT** button. 

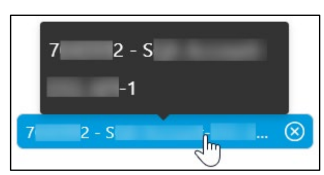
Notes:

- If you do not click the **ACCEPT** button, you will be unable to save your changes.
- Once you click the button, you are signed up to receive an email twice a year reminding you to keep your users' permissions current.
- On May 1 and November 1 of each year, you will receive an email notification reminding you to keep permissions current in the Permissions Manager application.

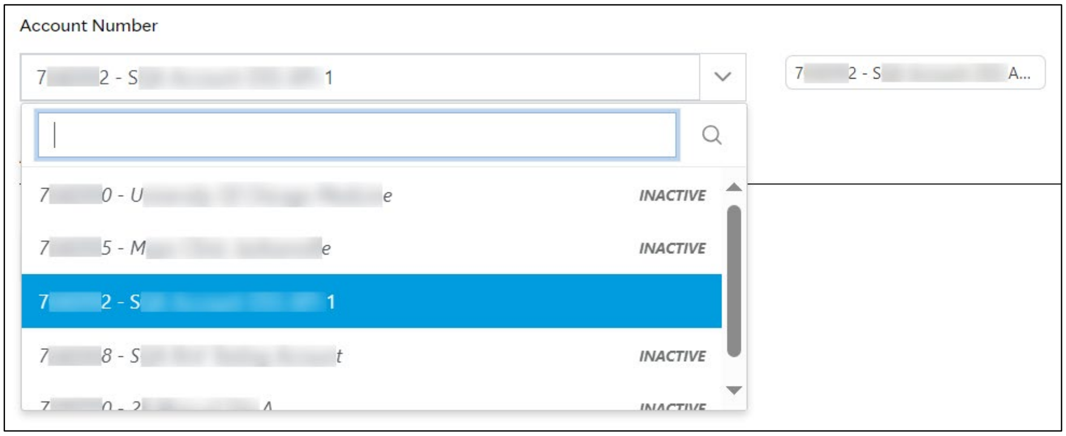
To the right of the **Account Number** field, a rectangular tile for the selected account appears, displaying the number and as much of the name as possible, followed by an ellipsis (…) if the name is long.



Tip: Hover over the account tile, which will turn **blue**, to bring up a tooltip displaying the complete account name and number (right).



To change your account selection, select a different account in the **Account Number** drop-down menu.



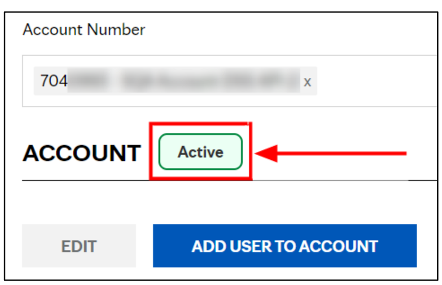
Subsequent login

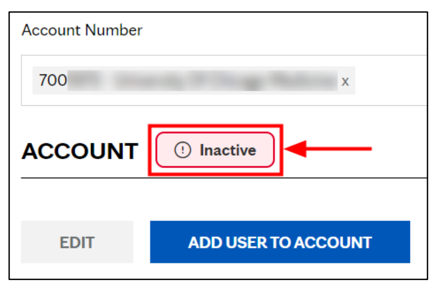
If this is not your first time logging in to Permissions Manager, the **Account Number** field displays the account that was selected when you logged out of your last session.

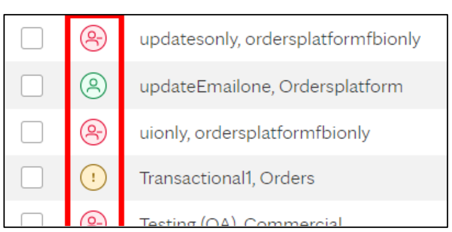
Account and user Login Status

Permissions Manager now displays each user's **Login Status**. This can help you find and remove users who are no longer working in the selected account, find those who may be locked out of MayoClinicLabs.com due to inactivity, and identify those who have not finished registering on the website.

On the landing page, to the right of the word **ACCOUNT**, Permissions Manager indicates whether the account is **Active** or **Inactive**.

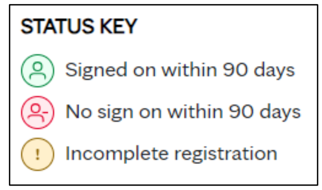


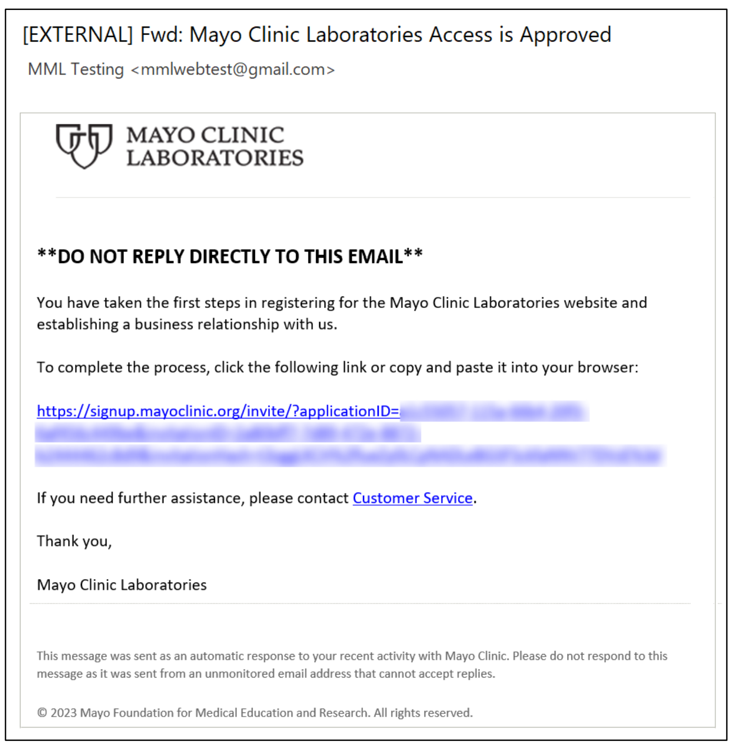




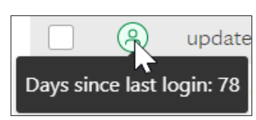
In the User List, the second column displays icons indicating each user's **Login Status** in Permissions Manager (left).

At top right of the User List, the **STATUS KEY** provides brief definitions of the three user statuses (right). The table below expands on these definitions and provides resolutions where needed.

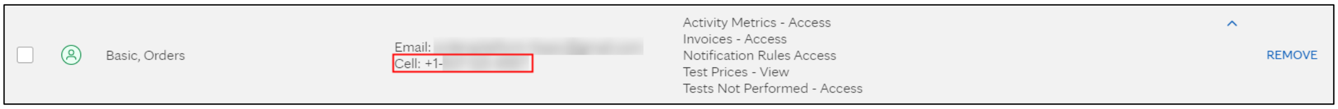


<table>
<tr><th>Icon</th><th>Login Status</th><th>Details</th></tr>
<tr><td></td><td>Signed on within 90 days</td><td>The user is currently active in Permissions Manager.</td></tr>
<tr><td></td><td>No sign on within 90 days</td><td>The user has not recently logged on and may be having trouble logging in. If they no longer need access to this account, you can remove the user’s association with it. See Removing a user from an account. If the user still needs to login, the login screen on MayoClinicLabs.com will direct them in resetting their password.</td></tr>
<tr><td></td><td>Incomplete Registration</td><td>This user has begun the registration process but has not logged in to MayoClinicLabs.com. They should check their email account for their welcome email with the subject header “Mayo Clinic Laboratories Access is Approved,” and then click the link in the body of the email to login and complete their registration.

[EXTERNAL] Fwd: Mayo Clinic Laboratories Access is Approved
MML Testing <mmlwebtest@gmail.com>
MAYO CLINIC LABORATORIES
DO NOT REPLY DIRECTLY TO THIS EMAIL
You have taken the first steps in registering for the Mayo Clinic Laboratories website and establishing a business relationship with us.
To complete the process, click the following link or copy and paste it into your browser:
https://signup.mayoclinic.org/invite/?applicationID=
If you need further assistance, please contact Customer Service.
Thank you,
Mayo Clinic Laboratories
This message was sent as an automatic response to your recent activity with Mayo Clinic. Please do not respond to this message as it was sent from an unmonitored email address that cannot accept replies.
© 2023 Mayo Foundation for Medical Education and Research. All rights reserved.</td></tr>
</table>

Hover over an icon to bring up a tooltip with more information on the user’s status (right).

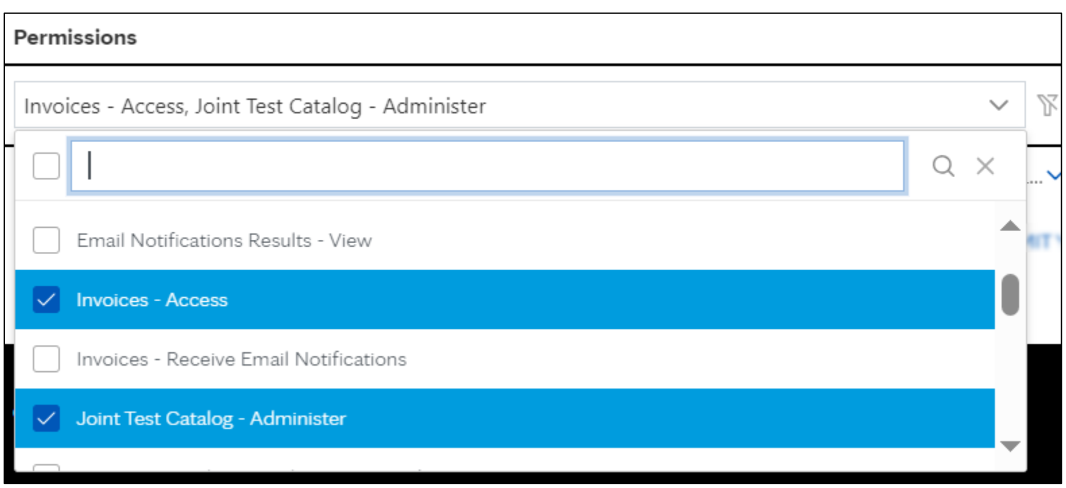


Clicking the down-arrow to the right of the **Permissions** column expands the table row to display the user's phone number in the **Contact** column, as well as any information that does not fit on the row when it is collapsed.



Enter search terms into the free-text search fields over the **Name** and **Contact** columns to narrow down the User List by those parameters.

You can also use the **Permissions** column drop-down menu to filter that column by the permission(s) whose check boxes you select.



Note: The **Permissions** filter displays only those permissions that have already been granted to users included in the User List.

To clear all check boxes, click the **Clear Filter** icon  at upper right of the drop-down menu.

If you need help resolving login issues, contact Customer Service.

Adding a user to an account

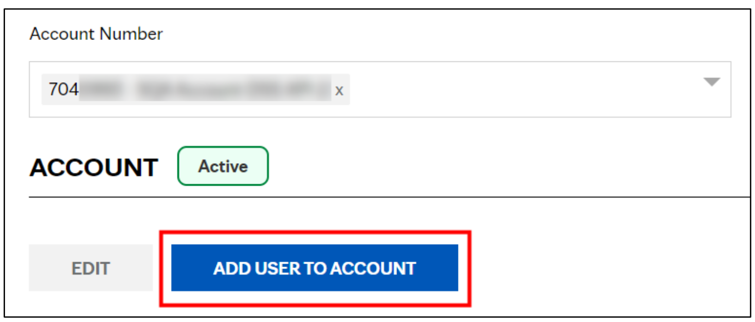
In Permissions Manager, you can add a user to an account on either of the tabs: **BY ACCOUNT**, which is the default, or **BY USER**.

Important: It is not recommended that you add permissions to inactive accounts. You can edit permissions in inactive accounts to provide access to invoices or older data. You can also remove unused permissions. However, adding access to other features in inactive accounts is not recommended.

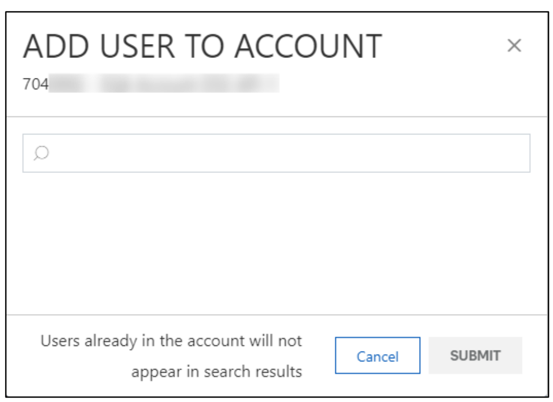
Adding a user to an account from the BY ACCOUNT tab

To add a user to the selected account(s) from the **BY ACCOUNT** tab:

1. Click the **ADD USER TO ACCOUNT** button. 



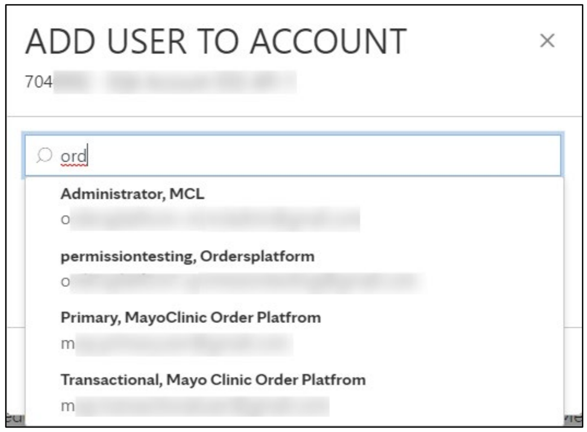
The **ADD USER TO ACCOUNT** dialog box appears.



2. In the search field, begin to enter the name or email address of the desired user.

   Note: The user must be registered on MayoClinicLabs.com and associated with an account you administer.

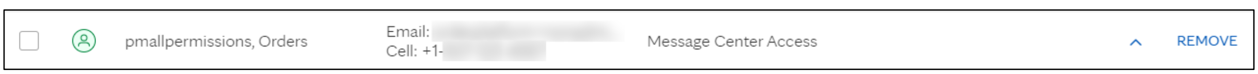
As soon as two characters are entered, Permissions Manager begins a predictive search and returns a list of results.



Note: If you enter a string of characters that can be found in only one user's name or email address, Permissions Manager brings that user up without requiring any selections.

3. Select the desired user's name.
4. At bottom right, click the **SUBMIT** button. (To cancel the addition of the new user, click the **Cancel** button.)

The new user is added to the User List on the **PERMISSIONS** landing page. To grant the user permissions, see Editing existing users' permissions below.

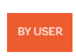


Note: Permissions are not automatically added when new users are added to an account. The CA must grant each new user the appropriate permissions.

At the top of the page, a banner indicates that your changes have been saved successfully (right).

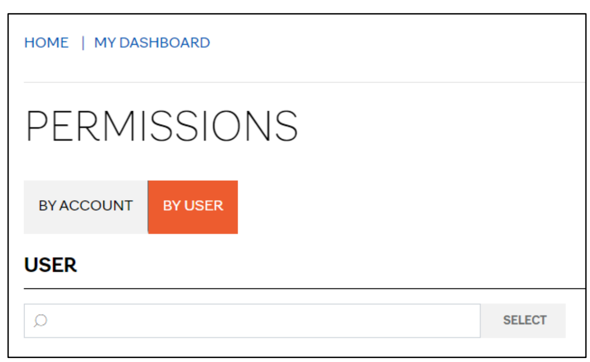
Adding a user to an account from the BY USER tab

To add the user to a new account from the **BY USER** tab:

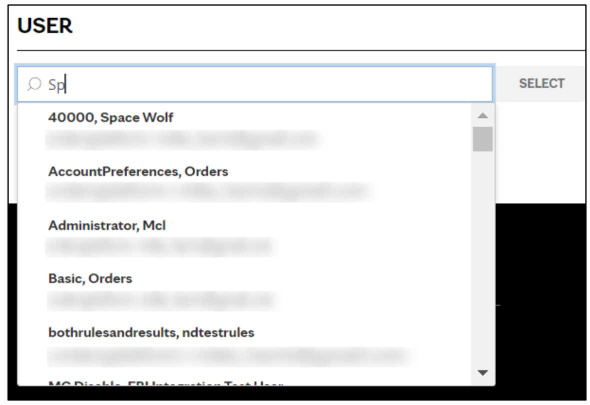
1. Click the **BY USER** tab (right). 

2. In the **USER** search field, begin to enter the name or email address of the desired user.

   Note: The user must be registered on MayoClinicLabs.com and already have access to an account that you are able to administer. If you cannot add a user to the desired account, contact Customer Service.



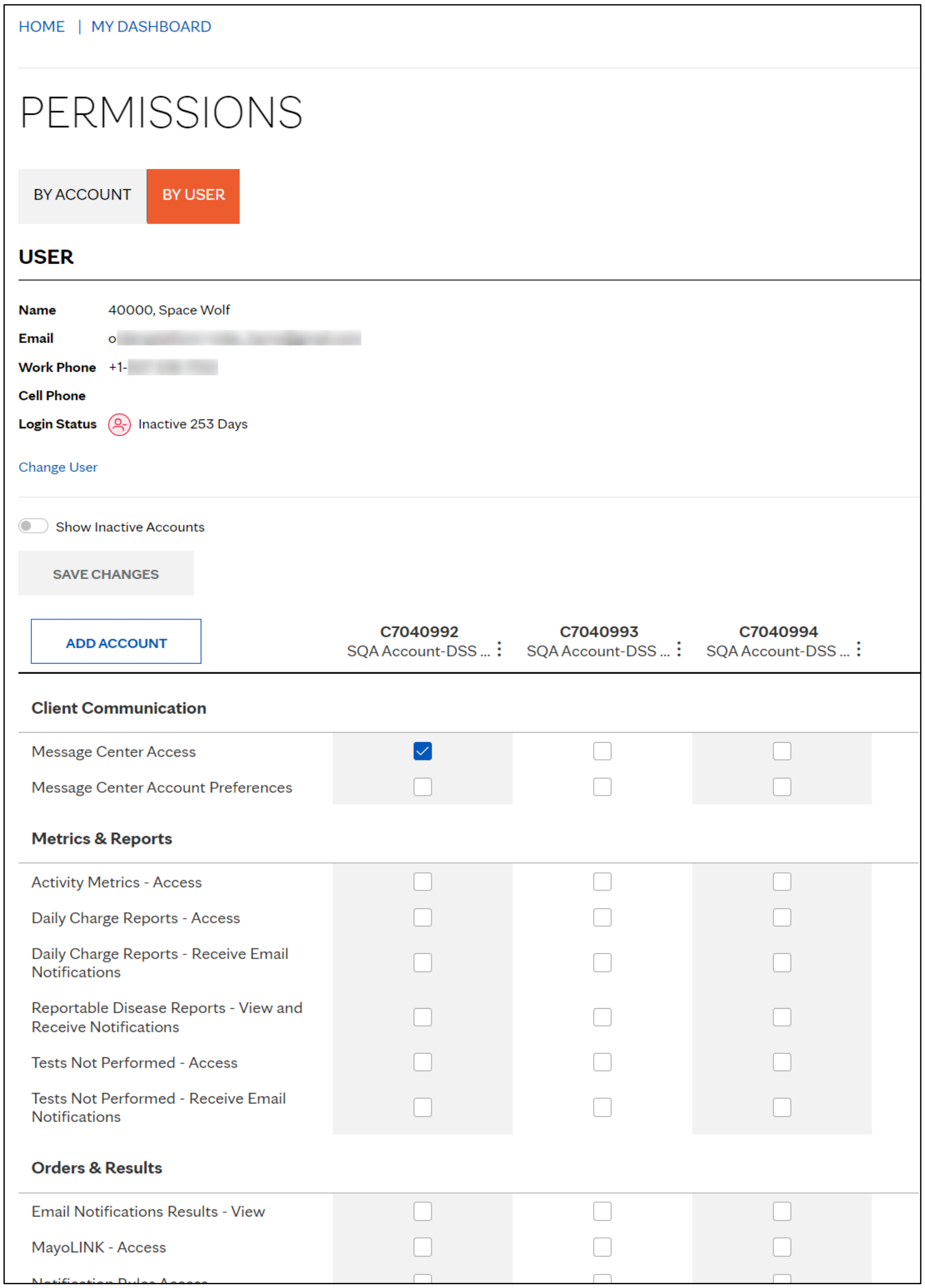
As soon as two characters are entered, Permissions Manager begins a predictive search and returns a list of results (right).



3. Select the desired user from the list.

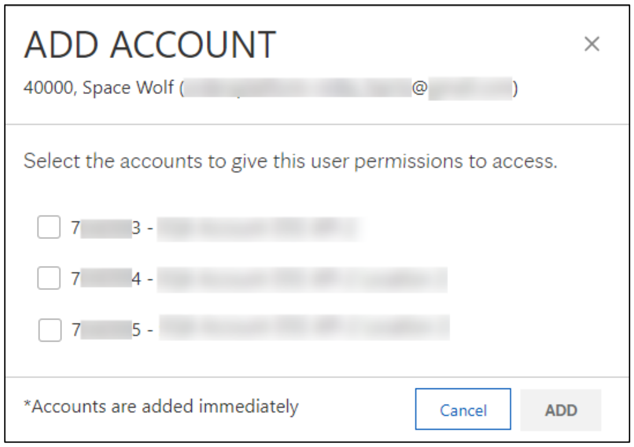
   Note: If you enter a string of characters that can be found in only one user's name or email address into the **USER** text field, Permissions Manager brings you directly to that individual's **USER** page without requiring any selections.

The **USER** page for that user appears.

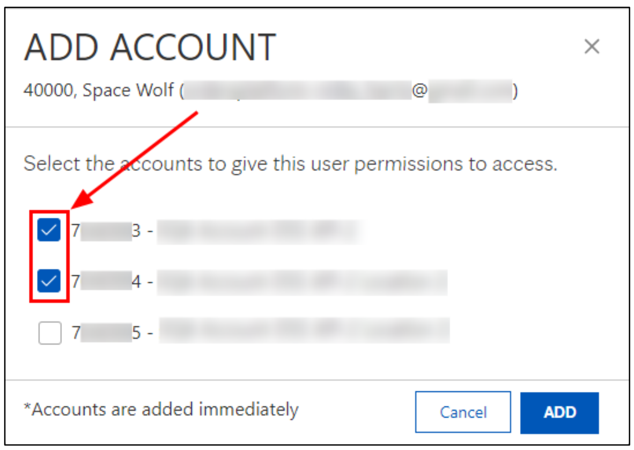


4. At top left, click the **ADD ACCOUNT** button. 

The **ADD ACCOUNT** dialog box appears.



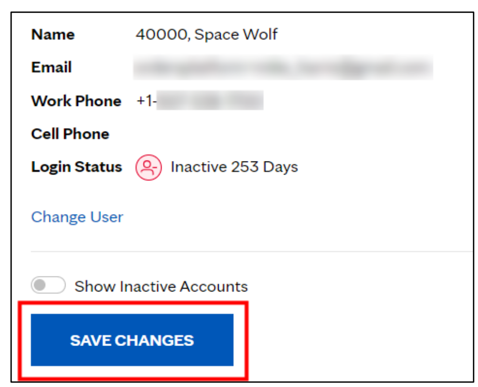
5. Check the check box of each account to which you want to add the user.

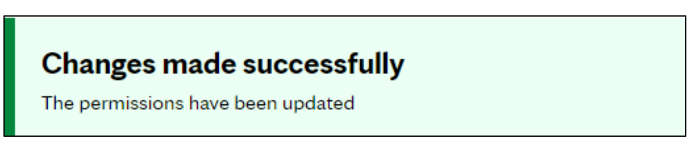


6. At bottom right of the dialog box, click the **ADD** button. ADD

Once you have made one or more changes, the **SAVE CHANGES** button SAVE CHANGES at the top of the **USER** page becomes active (right).

7. Click the button to save your changes.





You are returned to the **PERMISSIONS** landing page. At the top of the page, a banner indicates that your changes have been saved successfully (left).

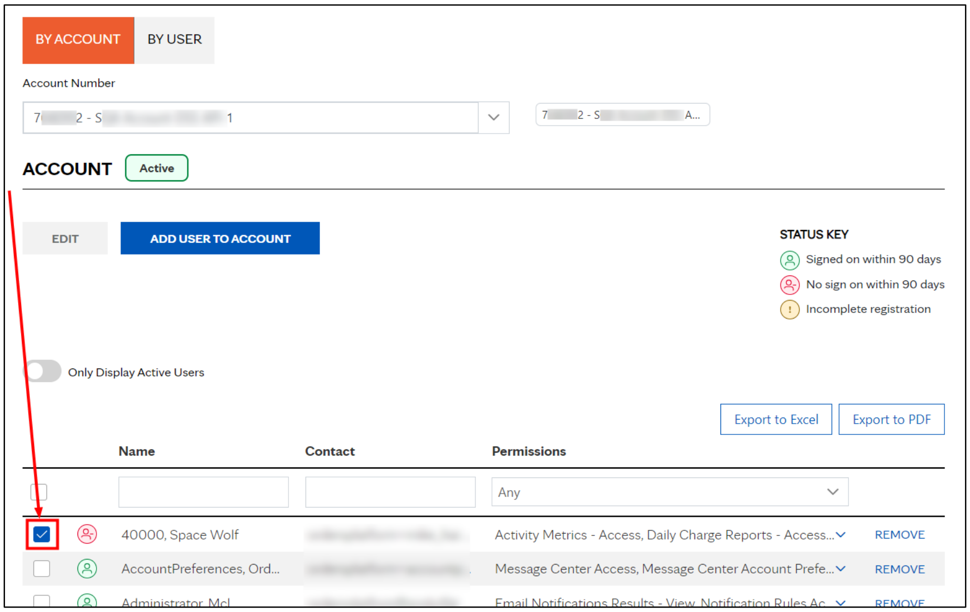
Editing existing users' permissions

Editing permissions by account

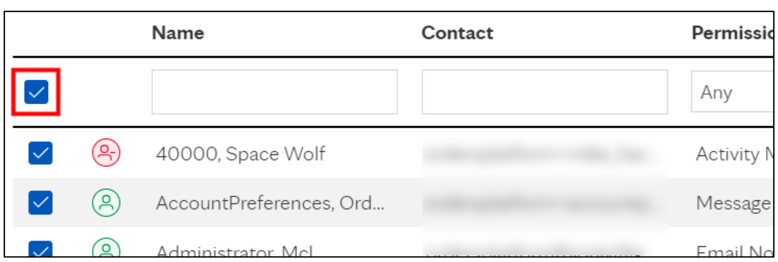
To change the permissions of one user or of multiple users already associated with an account:

1. On the landing page, on the **BY ACCOUNT** tab (default), select the user(s) whose permissions you want to change.

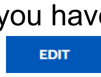
    - To select an individual user, check the box to the left of their name in the User List.

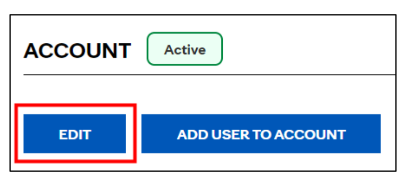


    - To select multiple users, check their boxes.
    - You can also select all users at once. At top left of the User List, at far left of the [free-text search field](#) row, check the box.



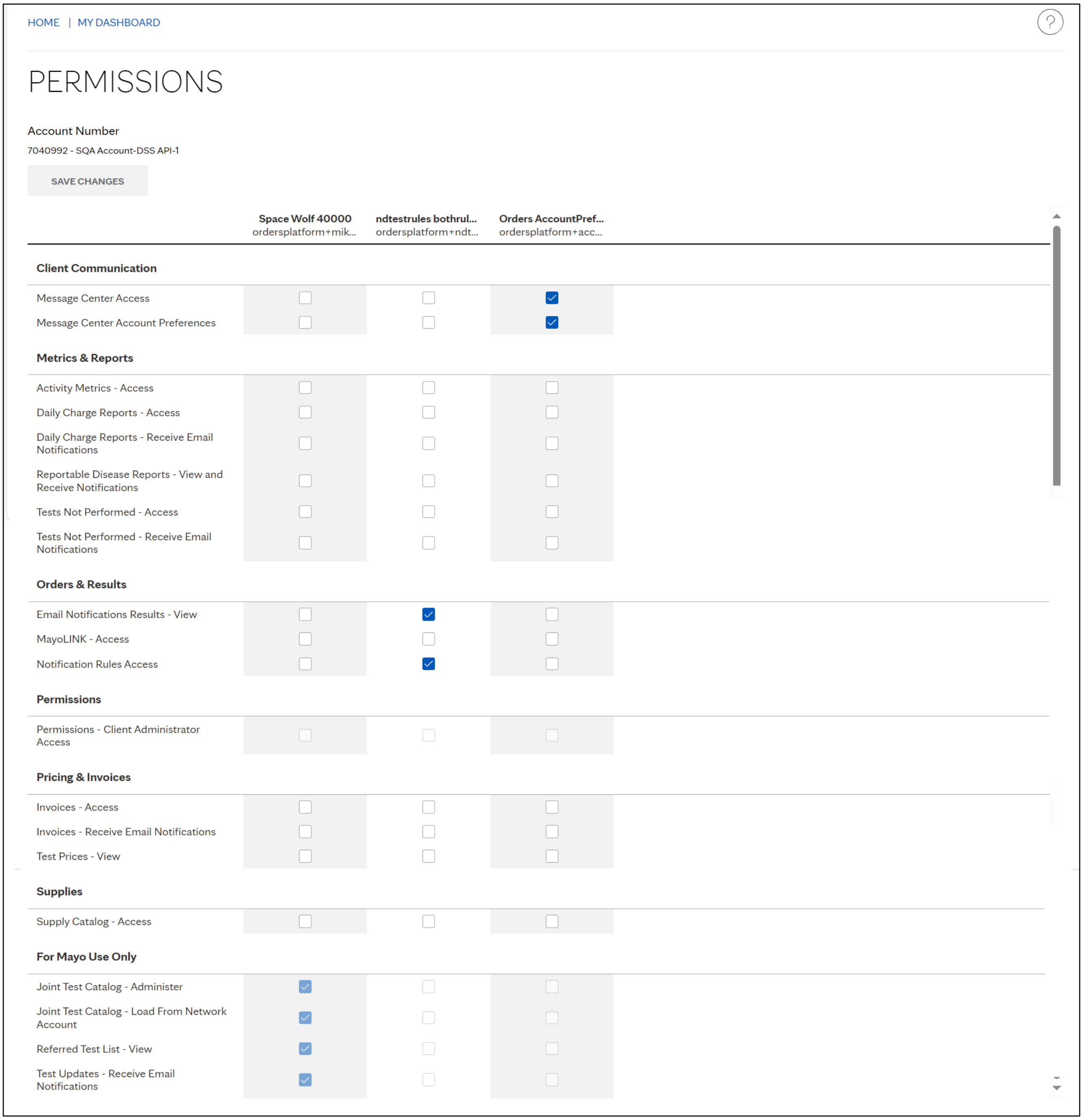
    To deselect all users again, uncheck the box.

    Once you have selected one or more checkboxes, the **EDIT** button  below the word **ACCOUNT** becomes active (right).



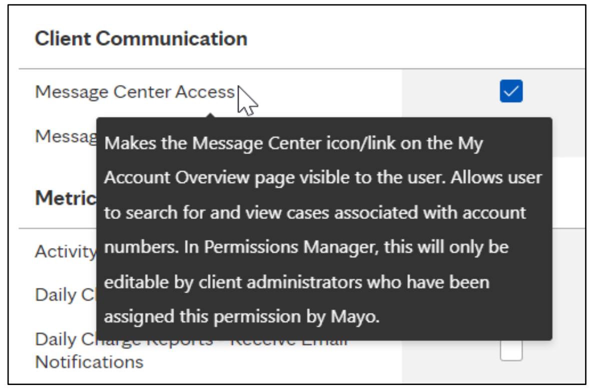
2. Click the **EDIT** button.

The **EDIT PERMISSIONS** page appears.

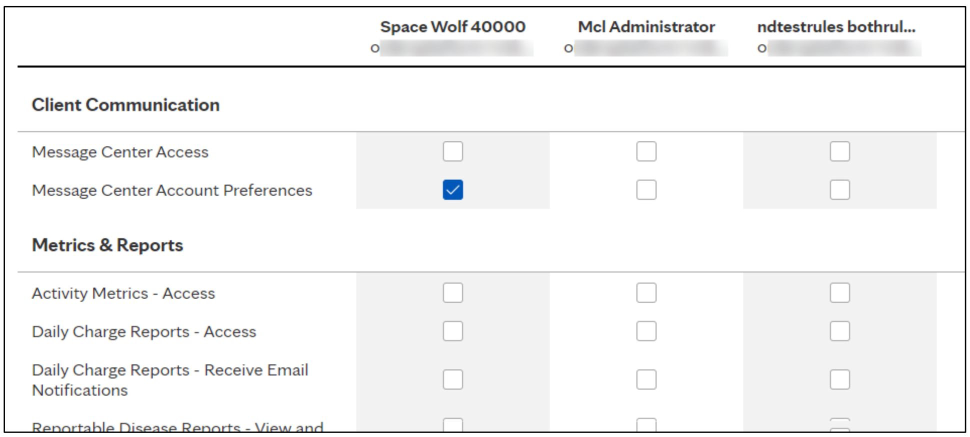


On this page, each user's permissions are displayed in a column, with the user's name and email address as the column header. A checked check box ☑ indicates that the corresponding permission has been enabled for the user.

If you hover over a permission, an explanatory tooltip appears (right).



If you checked the boxes for multiple users in the User List on the **PERMISSIONS** landing page, the **EDIT PERMISSIONS** page displays a column for each of those users.

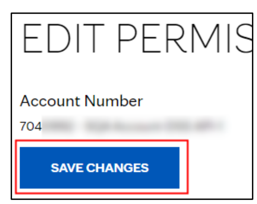


3. Check or uncheck permissions check boxes as needed for each user.

   Note: Permissions for MayoLINK and Message Center require account configuration prior to usage. They will not appear in Permissions Manager until account configuration is complete and a Mayo representative has assigned you these permissions, after which the permissions will be available for you to assign to team members. If you have any questions about these permissions, contact [Customer Service].

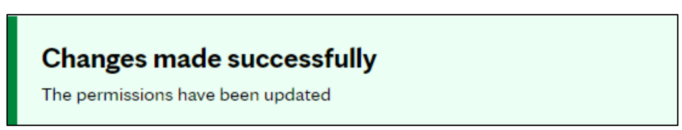
   Once you have made one or more changes, the **SAVE CHANGES** button 

 at the top of the **EDIT PERMISSIONS** page becomes active (right).



4. Click the button to save your changes.

   You are returned to the **PERMISSIONS** landing page. At the top of the page, a banner indicates that your changes have been saved successfully (right).

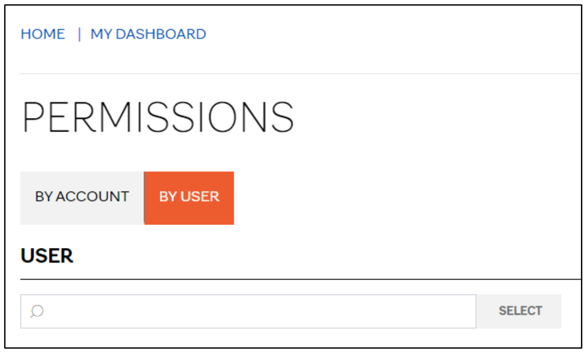


   If you wish to cancel your changes on the **EDIT PERMISSIONS** page and return to the **PERMISSIONS** landing page, click the **BACK** button in your web browser.

Editing permissions by user

To change the permissions of a single user across all accounts to which that user has access:

1. On the landing page, click the **BY USER** tab. BY USER

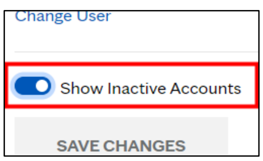


2. Find the user by following steps 2 and 3 under Adding a user to an account from the **BY USER** tab.

   At the top of the **USER** page for that user, the user's **Name**, contact information, and **Login Status** (right) are listed. If **Login Status** is either **Active** or **Inactive**, Permissions Manager indicates the number of days since their last login.

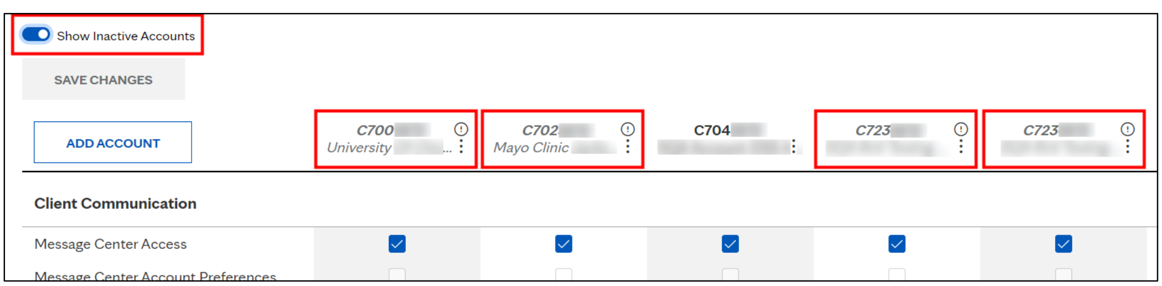
   Below, you can click the **Change User** link Change User to return to the **BY USER** search field.

   The **Show Inactive Accounts** slider (left) is toggled off by default. Slide it to the right to toggle it on.

   Each account to which the user has access is represented by a column of permissions check boxes. Each column header displays the account number and name.

   If the **Show Inactive Accounts** slider is toggled on, columns for inactive accounts to which the user has access appear. Their numbers and names are italicized, and a warning icon ⓘ appears to the right of the account number.

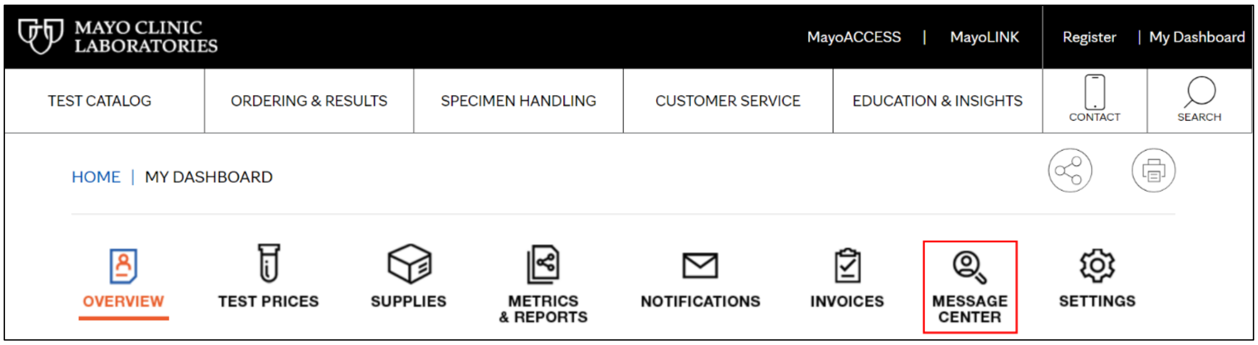


3. Check or uncheck the permissions check boxes as needed for the user.

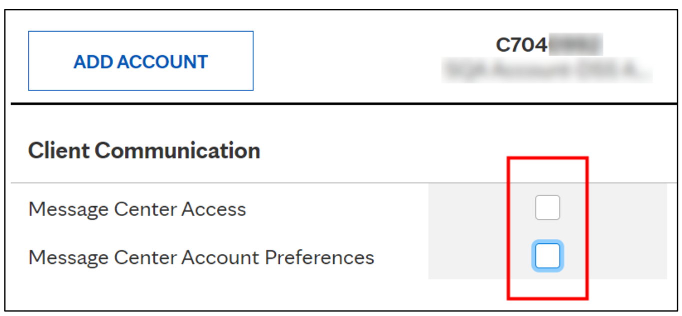
   Note: Permissions for MayoLINK and Message Center require account configuration prior to usage. They will not appear in Permissions Manager until account configuration is complete and your organization's CA has been granted access to Permissions Manager. If you have any questions about these permissions, contact Customer Service.

If you wish to cancel your changes on the **EDIT PERMISSIONS** page and return to the **PERMISSIONS** landing page, click the **BACK** button in your web browser.

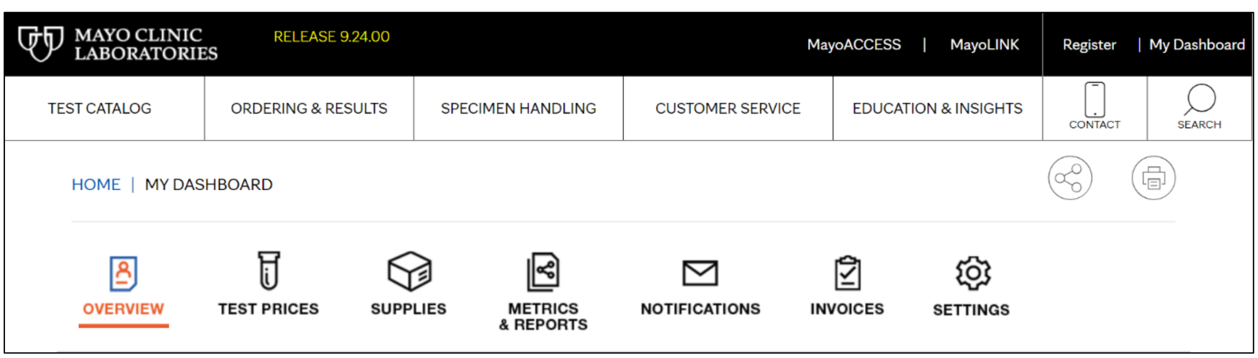
Note: When you remove a user's access to a **Dashboard** feature or application in Permissions Manager, the corresponding icon is automatically removed from the **Dashboard** when the user logs in to MayoClinicLabs.com. See the example screenshots below.



Dashboard before removal of Message Center access



Message Center permissions check boxes for the user are unchecked



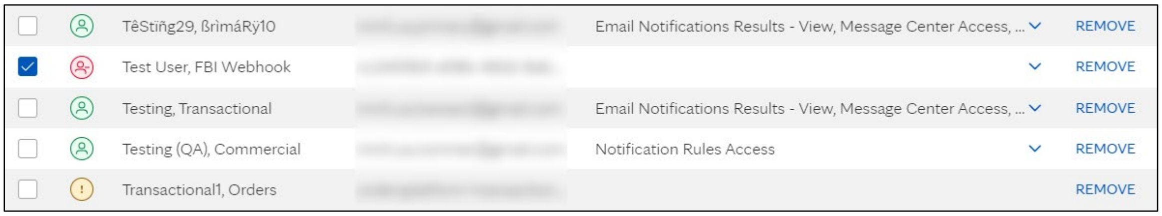
Dashboard after removal of Message Center access

Removing a user from an account

Removing a user from the BY ACCOUNT tab

To remove a user from the selected account from the **BY ACCOUNT** tab:

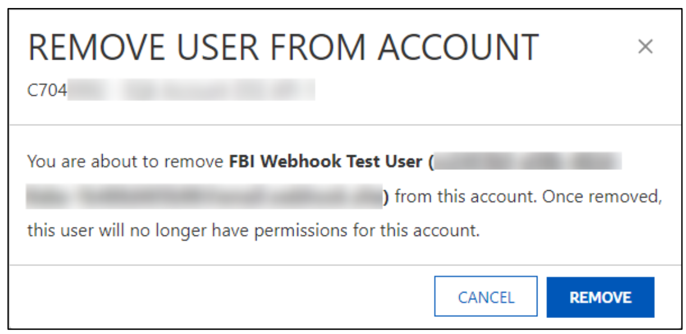
1. In the User List on the **BY ACCOUNT** tab of the **PERMISSIONS** landing page, find the user you wish to remove.



Note: You do not need to check the user's check box. In the screenshot above, the box is checked to provide clarity on which user is being removed.

2. At the right end of the list row for that user, click the **REMOVE** link. 

The **REMOVE USER FROM ACCOUNT** pop-up appears (right), asking you whether you would like to continue removing the user.



3. To remove the user, click the **YES** button. 

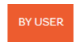
To cancel the removal, click the **NO** button. 

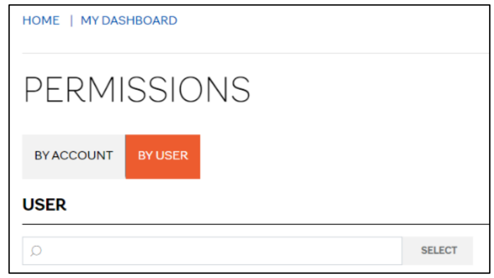
If you click the **YES** button, the user is removed from the User List. You are returned to the **PERMISSIONS** landing page. At the top of the page, a banner indicates that your changes have been saved successfully.

Note: This procedure removes any association between the user and the selected account, as well as any permissions the user had that were specific to that account. However, the user remains registered on MayoClinicLabs.com, and their access to other accounts is not affected.

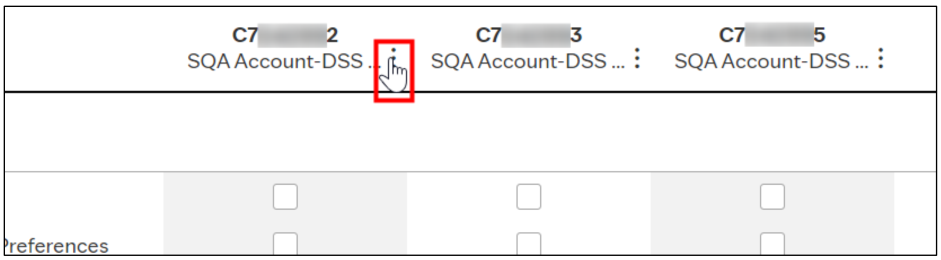
Removing a user from the BY USER tab

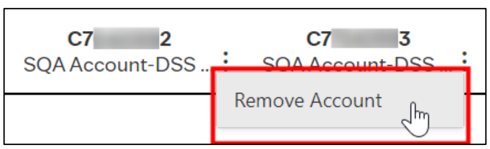
To remove a user from the selected account from the **BY USER** tab:

1. On the landing page, click the **BY USER** tab  (right).
2. Find the user by following steps 2 and 3 under Adding a user to an account from the **BY USER** tab.



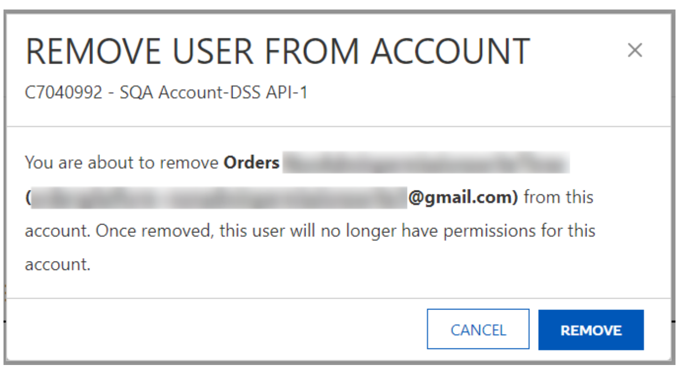
3. In the appropriate account column, hover over the vertical ellipsis. 

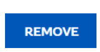




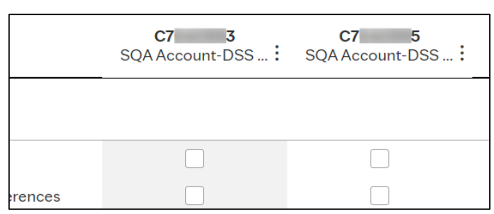
4. Select **Remove Account** (left).

The **REMOVE USER FROM ACCOUNT** pop-up appears.



5. Click the **REMOVE** button. 

The column disappears from the **USER** page (right).



Exporting data from the User List

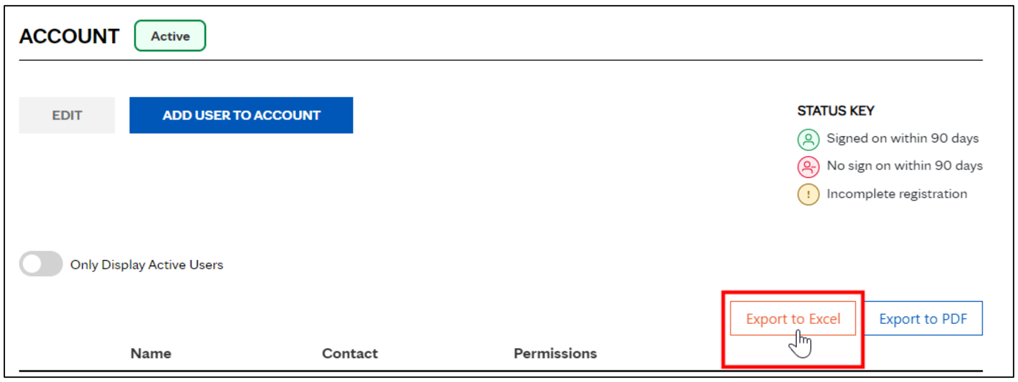
You can export data from the User List, sorted in any way you like, as:

- A Microsoft Excel (.xlsx) file.
- A PDF file, with data grouped by either permission or user.

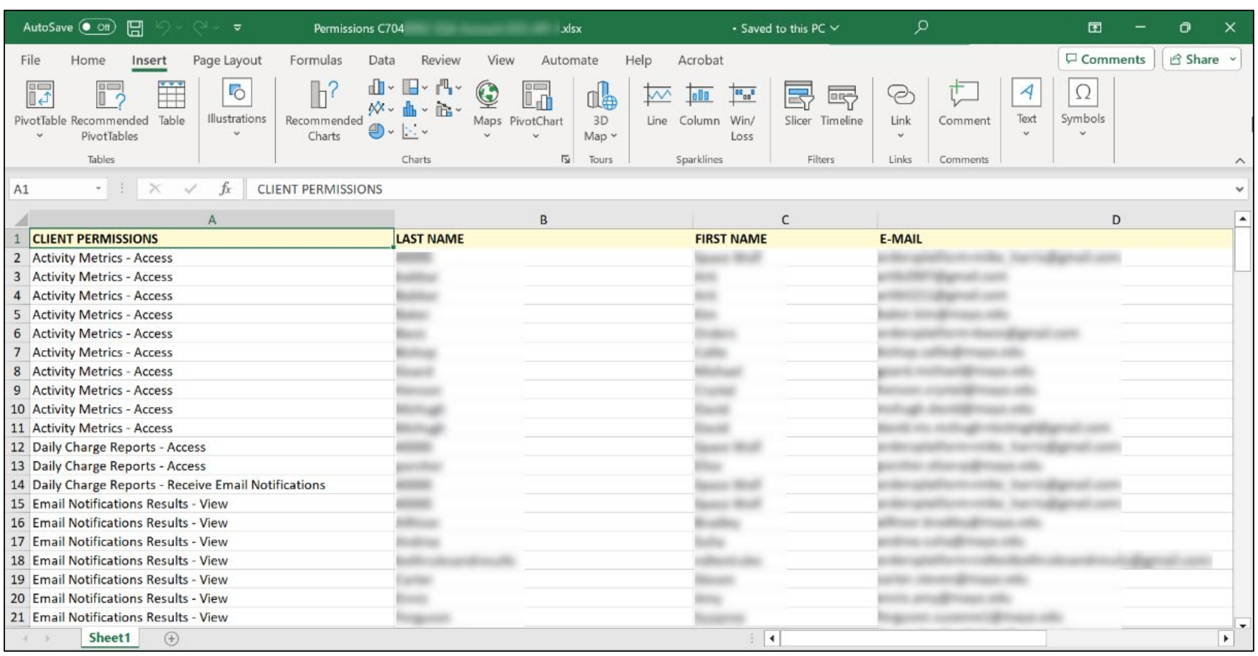
Note: Export is limited to data in the selected account.

Exporting data to Excel

On the **PERMISSIONS** landing page, on the right just below the **STATUS KEY**, click the **Export to Excel** button.

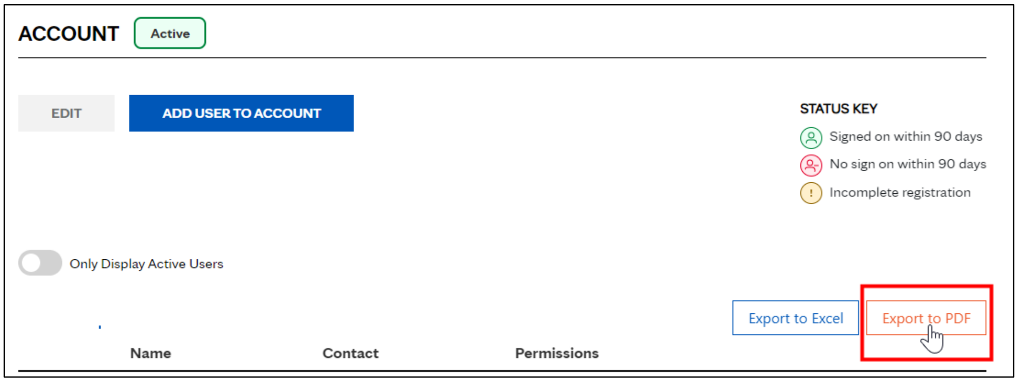


An Excel file titled “Permissions [account number].xlsx”, containing all data currently shown in the User List, will be downloaded to your device. Below is a screenshot of an example Excel file.

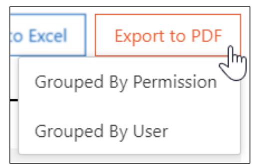


Exporting data to PDF

1. On the **PERMISSIONS** landing page, on the right just below the **STATUS KEY**, click the **Export to PDF** button.

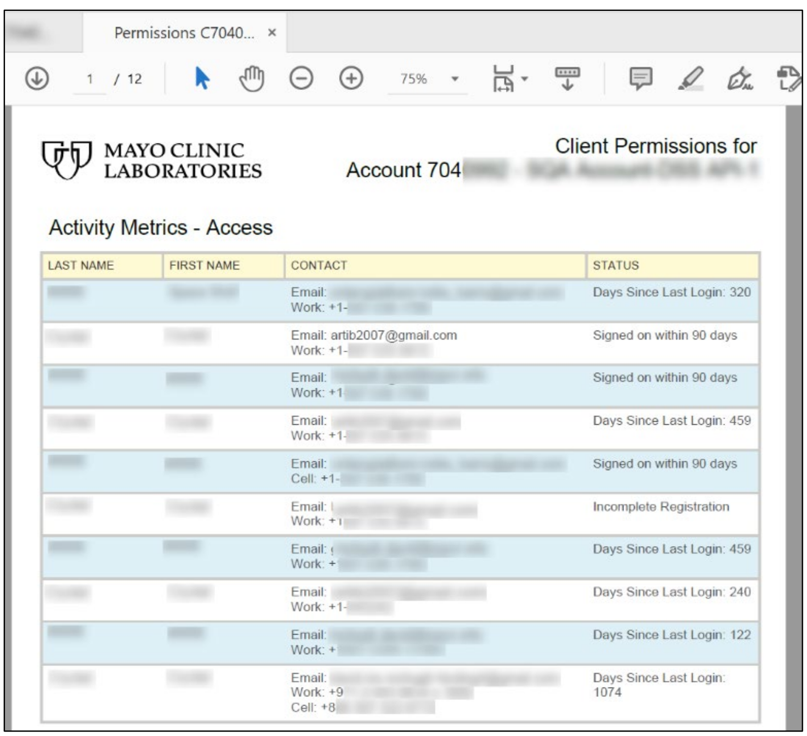


2. From the drop-down menu, select either **Grouped By Permission** or **Grouped By User** (right).

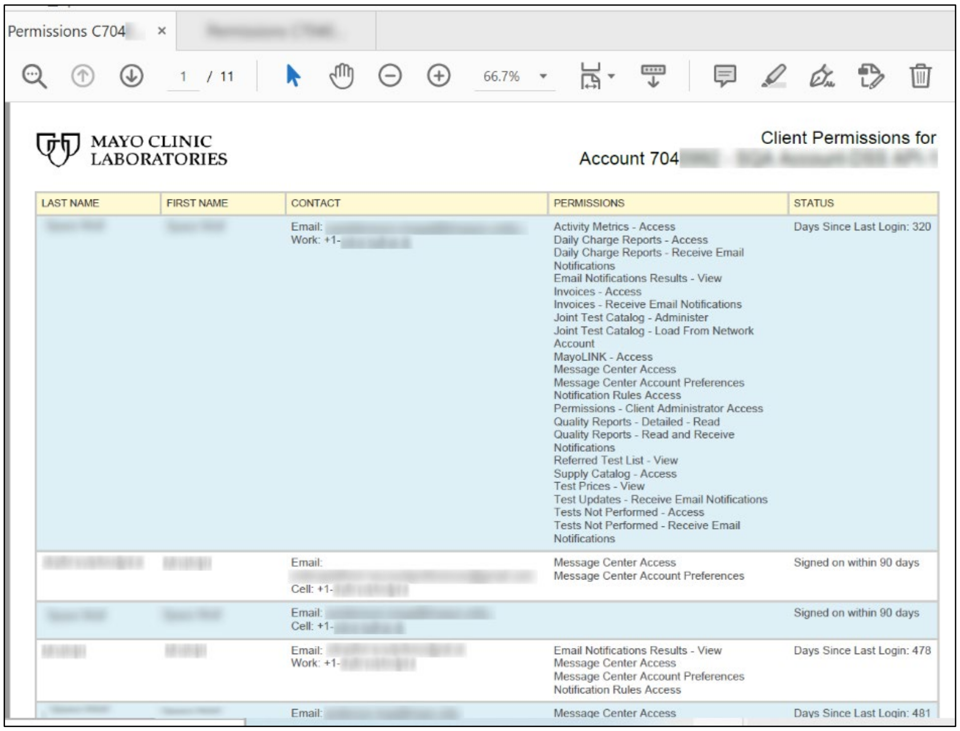


Depending on your selection, a PDF file titled “Permissions [account number] - By Permission.pdf” or “Permissions [account number] - By User.pdf, containing all data currently shown in the User List, will be downloaded to your device.

Below is a screenshot of an example PDF file with data grouped by permission.



Below is a screenshot of an example PDF file with data grouped by user.



Frequently asked questions

Q: A user is missing from the User List on the **Permissions** landing page. How do I re-add the user?
A: In some cases, if all a user's permissions have been removed, that user may be automatically removed from the account(s) in question. If this occurs, re-add them by following the instructions in Adding a user to an account. If the user's permissions are subsequently removed again, they will continue to appear in the User List with no permissions.

Q: Are there any limitations on how many Client Administrators (CAs) we can have?
A: No. You can have more than one CA. To add a CA, work with Customer Service.

Q: What happens if a user changes their name or email address?
A: Permissions Manager captures all user and account information found on MayoClinicLabs.com and reflects any updates made to that information.

Q: I need to change a permission listed in the **For Mayo Use Only** category for one of my users. How do I update those permissions?
A: To change **For Mayo Use Only** permissions, contact Customer Service.