# PASSWORD AND USER MANAGEMENT

Before you start entering data each person accessing Socrates should set up their own user ID and password. If you are in a group you may want to limit access for some users to certain functions of the database, these options can be set up under User Management. The main reason for setting up individual users is to enable you to track who entered or modified data, and to ensure that each user can only have access to whatever the administrator wishes them to have. Each screen in Socrates records the user and the time that data entered was added or changed. These data are also recorded in the data entry report for the individual record and the database overall.
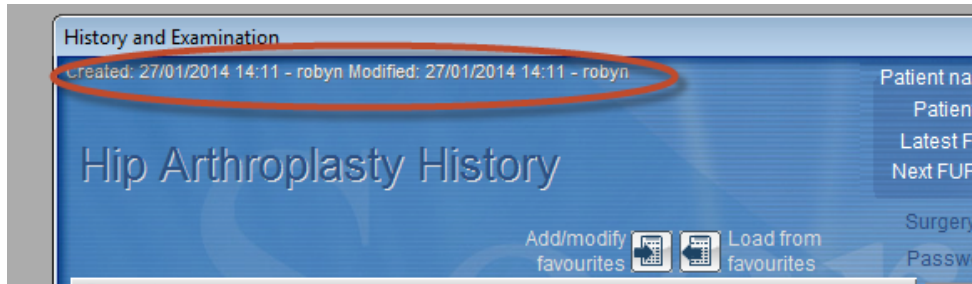
DEFAULT PASSWORD

To first access Socrates to set up your log in and password, you can log in using Admin for ID and Admin for password. If this doesn't let you in it means that someone at your site who is an administrator has already deleted this default log in. Contact your administrator who will have to log in and allow you to add your credentials.

ACCESSING THE USER MANAGEMENT SECTION
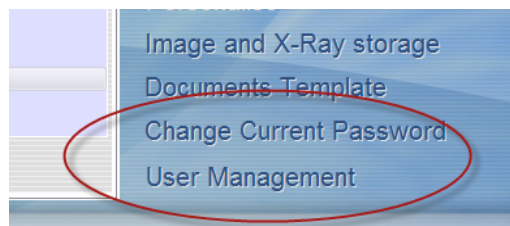
You have options available to do the following in the User Management section.

Administrator privileges. If you don't choose this option users won't be able to view and access the User Management option on the Set up screen to be able to set up new users or limit access to existing users. Users without admin privileges will only be able to change their own password.

Change user details or suspend users.

Limit access to users to selected surgeons records for selected users.

Limit access to users for selected studies

Limit access to the export function.

Limit access to the file menu on the set up screen to prevent users from being able to select these options.

Limit access to the Set Up files (add surgeons, add or modify adaptable fields etc) .

Delete surgery and patient records.

Limit access to users so they only have read only rights, no data can be added or modified.

Set a password expiry period for all or individual users.

To access these options click on User Management on the bottom right side of the Set Up screen. If you can't see this it means you have been set up as a user but have not been assigned administrator privileges.
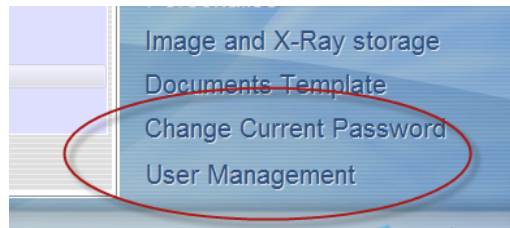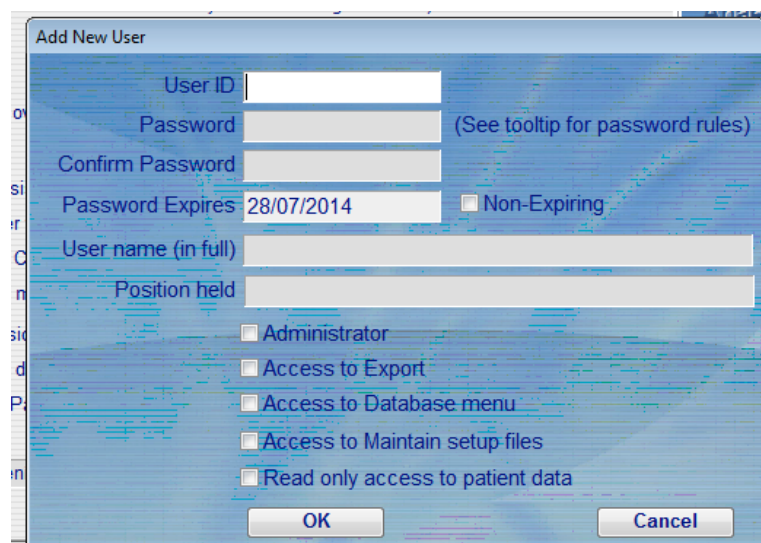

This screen will display.
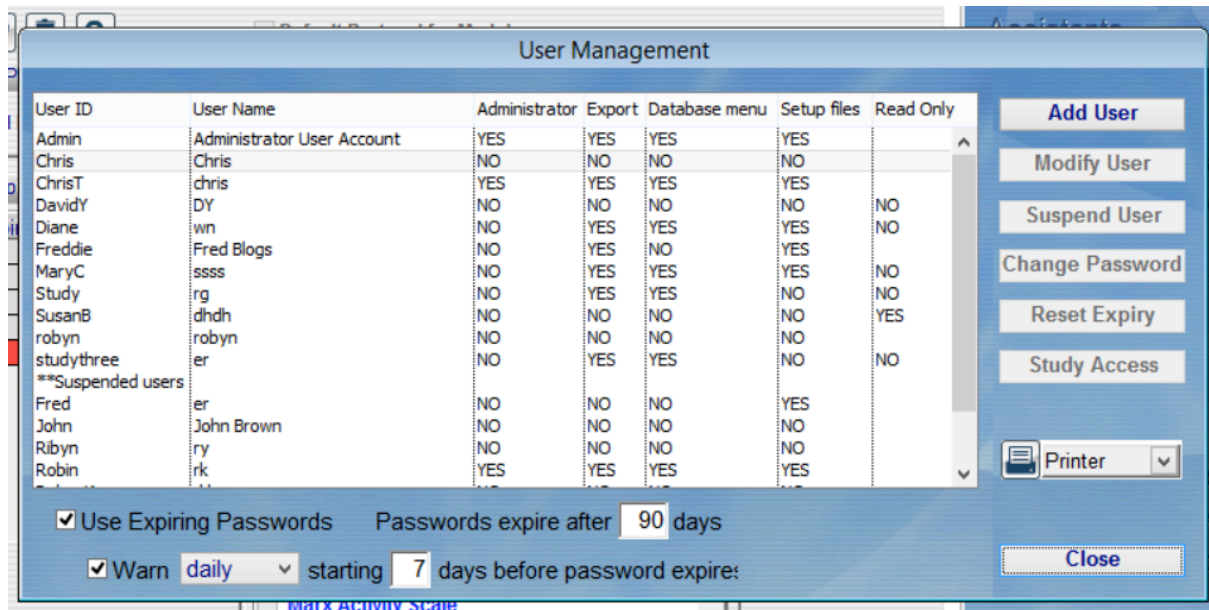
The default User ID and password are both "Admin". Once you have set up your users with their own details you should suspend Admin as a user.

ADDING A NEW USER

Click on Add User and this window will display.

PASSWORD

Password rules

The passwords must be a minimum of 8 characters and contain 3 of the 4 following – uppercase, lower case, numbers or special characters.

Some examples   Mary123$ Drbloggs@2   fluffy30478!

Password expiry

An administrator can elect to have passwords expire. There are a number of options. You can elect to have all passwords expiring in the same number of days or you can set individual users to expire at a set time. This can be useful if you have visiting data analysts', fellows or research assistants who are working on a specific project with a finite endpoint.

To assign a default password expiry time to all users choose the options as below. Even if you have a default set up you can still change an individual user to a selected expiry date. You can also set an individual user to a non-expiring password.

If a user fails to change the password before the expiry date they will need to contact an administrator who will be able to access their user details and change their password.
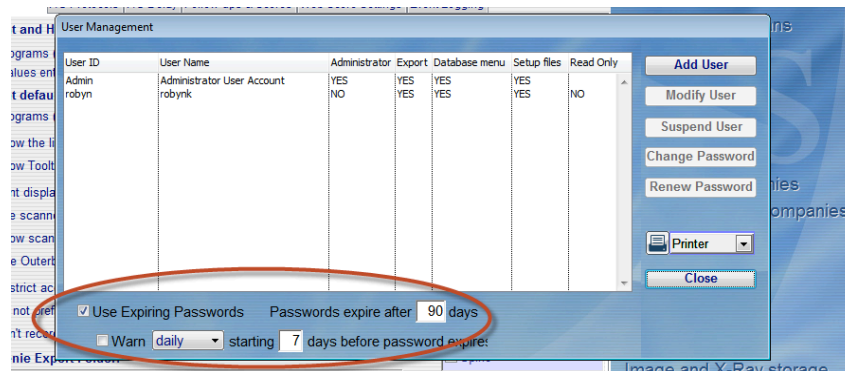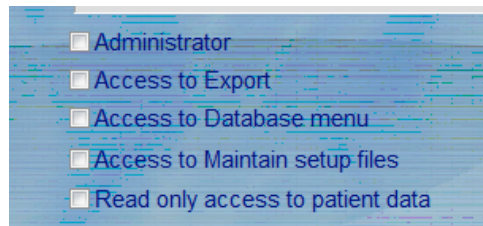

The next example we have assigned a Fellow called John B an expiry date of 6 June 2014 and allowed him access to export data, and with read-only privileges.
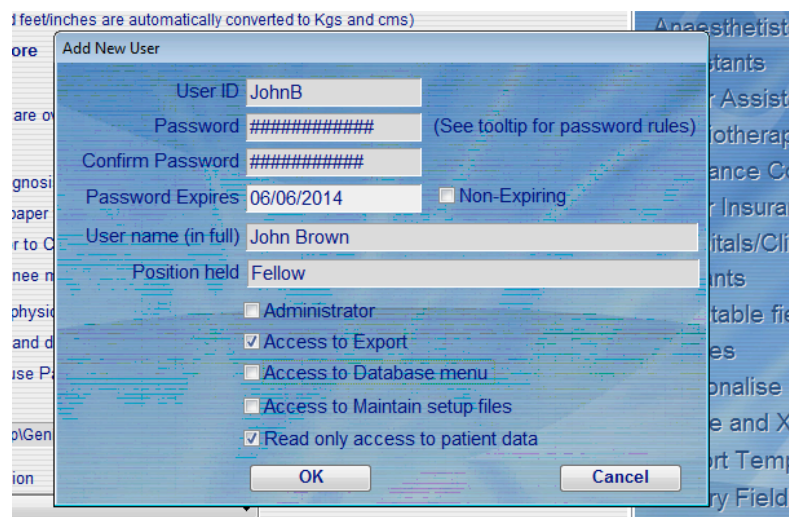
SELECTING ACCESS PRIVILEGES FOR USERS

After you have added a new user, you have the following five options on this window.

Administrator: If you don't check Administrator the user won't have access to be able to add users and assign these privileges. They also will not be able to delete a patient or a surgery record or have access to the Webscore settings page in the Set Up screen.

Access to export: If you don't select this users will not be able to export data from the database. This function is used to export data to excel or a stats program to run advanced statistics, etc. Users without this option will get the following message if they don't have permission.
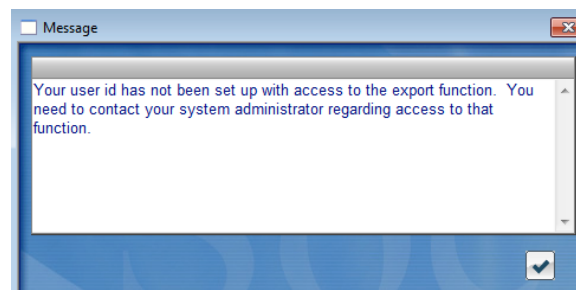

Access to maintain set up files
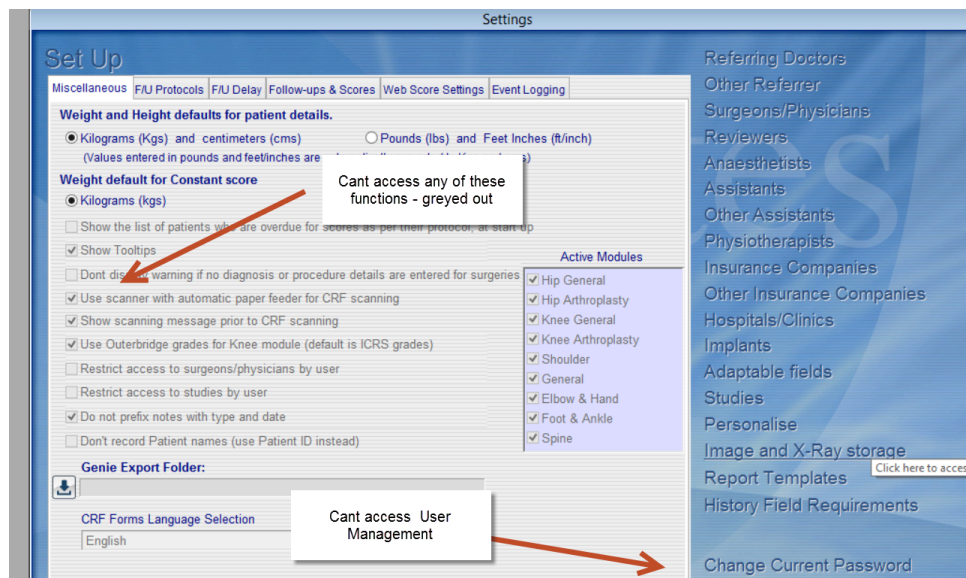
If this isn't checked the user won't have access to add or modify surgeons', assistants, hospitals - any of those on the list on the right hand side of the set up screen. In addition they won't be able to add or modify any of the adaptable fields, procedure names, complications, keywords etc. This is often a good idea in a multi user site where you have the possibility of different users setting up fields. For example the term DVT and Deep Vein Thrombosis may be set up by two different users which will result in data being entered into both. The message below will appear if a user without these privileges clicks on the Add or Modify icon.
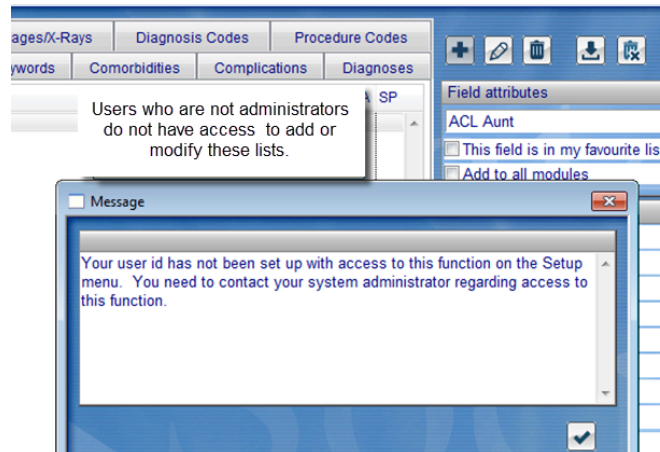
Access to database menu

This allows a user access to open other databases, set up new ones, run updates etc. If this option is not selected they will see this message when attempting any of these functions.
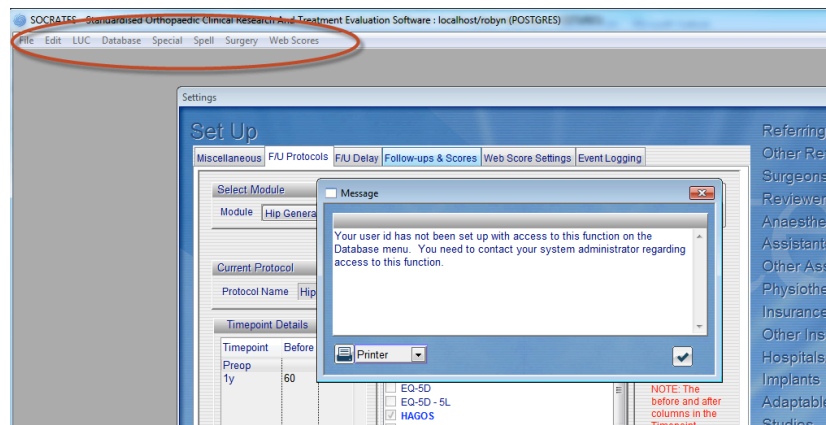

Read only access

Users who have this selected will not be able to modify or add data to any screens in Socrates.

RESTRICT ACCESS TO SELECTED SURGEONS

If you are likely to want to limit access to certain surgeons records by user, check this box on the Set Up screen before you enter the user management section.

If you have checked this option on the Set Up screen and you are an administrator, when you add a user you will also have the option of limiting the access of this user to only those records of the surgeon/s you choose. You can go back at any time and remove or add surgeons to this list. If you are an administrator you will have access to all records.
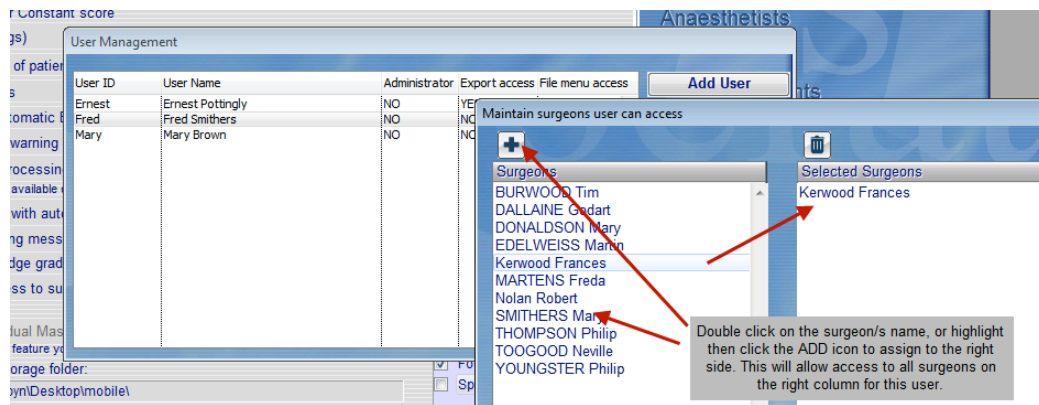
You can select more than one surgeon for the user to have access to.
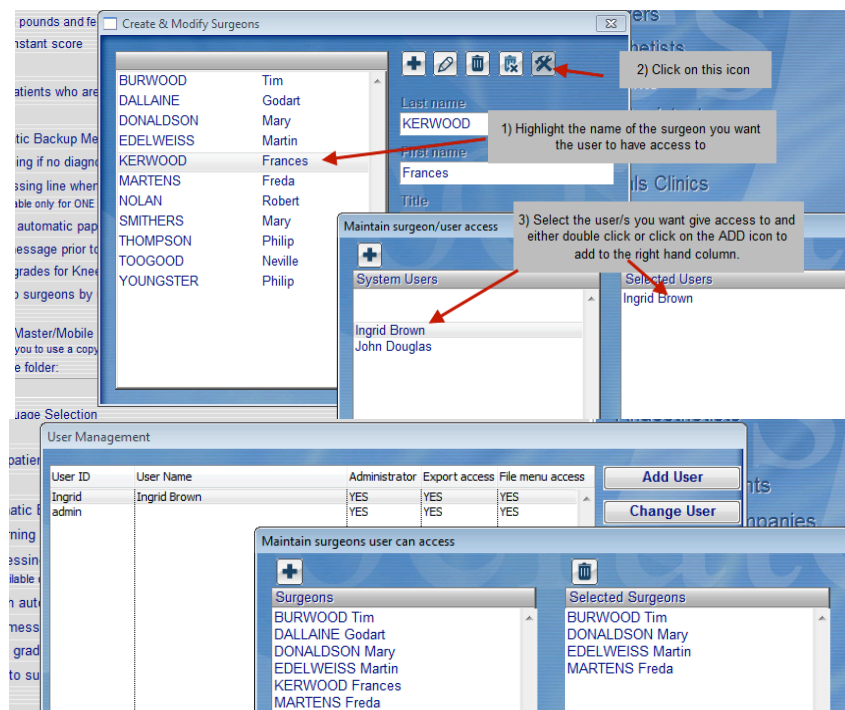
If this option is chosen for a user this is the way the data will appear on the patient screen - only surgeries for the selected surgeon will be accessible to that user, the others will be greyed out. They will also not be able to run statistics or reports on data for that surgeon unless they have access.
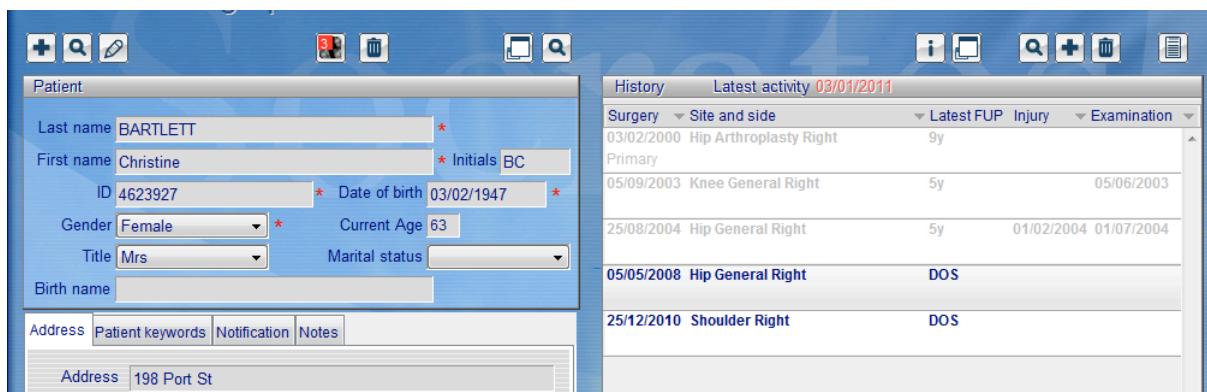
If the user clicks on surgeries belonging to a surgeon to whom they don't have access, this message will be displayed.
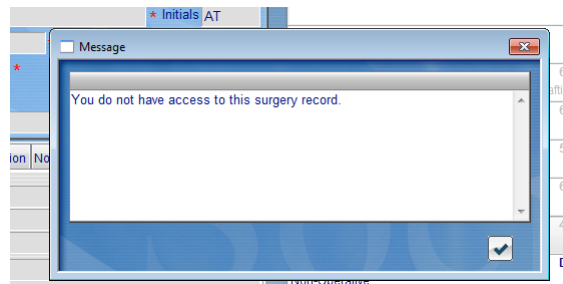

If no surgeon name has been selected on the surgery record these records will be accessible to anyone. However, if Restrict users access is checked **it is mandatory** to add a surgeon name, users will be prompted to add one if they try to exit the history screen without adding one.

Limit Access by Study

It is possible to limit access to certain users only allow access to certain studies. This might be required if an IRB has given approval for a study to be undertaken within an existing database, and they don't allow the study managers to access any records other those that are in that study. If a record has no studies assigned the user won't have access to any records.
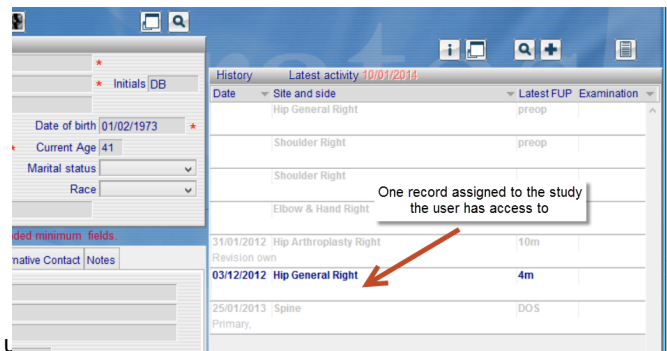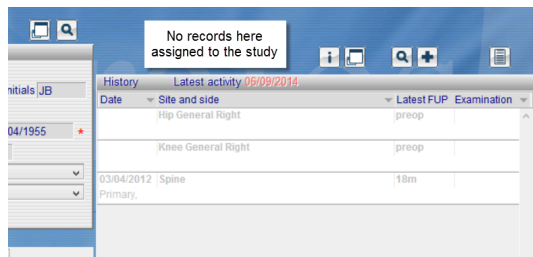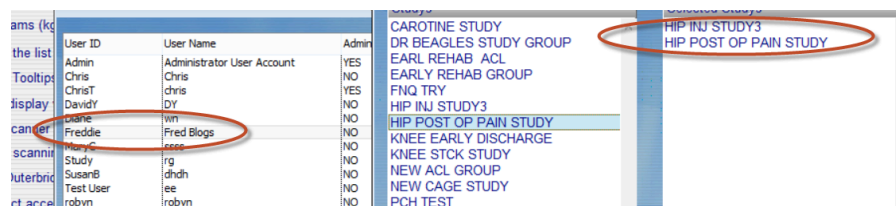

To implement this, check "Restrict access to studies by u
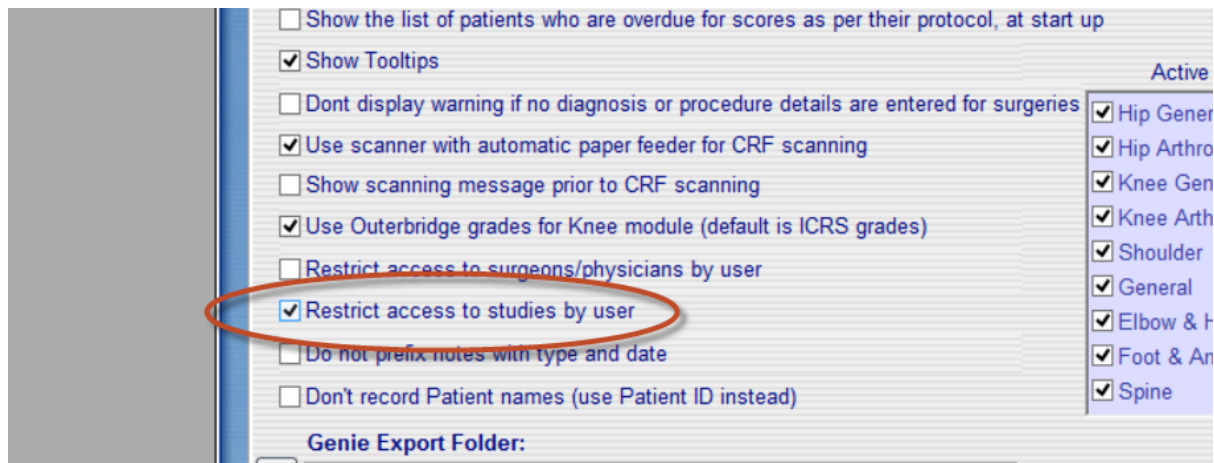
Then set up the user with their access levels and save. Once they are set up select Study Access.
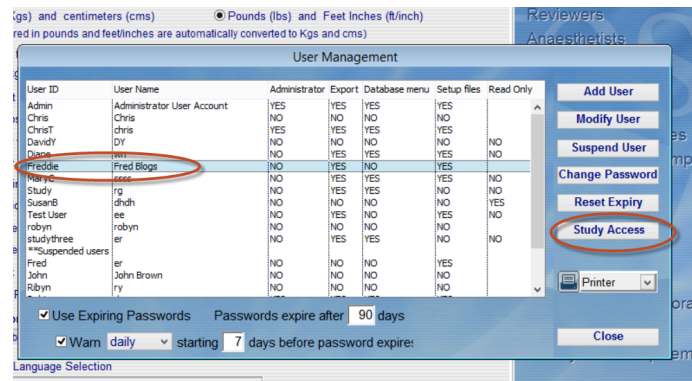
The list of studies will then be displayed. Add as many studies as you want this user to have access to, then close. To add, either click and select the ADD icon on the top of the list column, or select and double click.

In the example above Freddie will only be able to access records that have either of the two studies assigned to them.

IMPORTANT NOTE:

If a single record has more than one study assigned to it there is no way to limit access to a user to only the one study since the studies belong to the same record, and have common fields/screens.

CHANGING DETAILS ON EXISTING USERS

Suspending a user

If you are an administrator you can suspend users or change details of existing users. If you suspend a user they will automatically appear at the bottom of the list. If you have residents or Fellows passing through your department who are entering or analysing data it's a good idea to set them up as users also, you can suspend them when they move on. Even though they are suspended there will still be a record of who they were, when they were active and what screens had data they had accessed or entered is recorded.
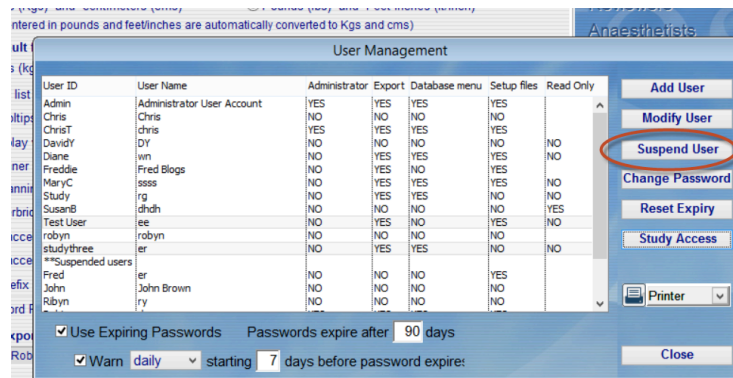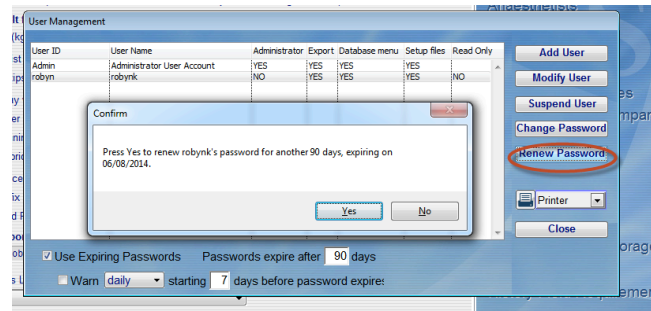

Changing Current Password
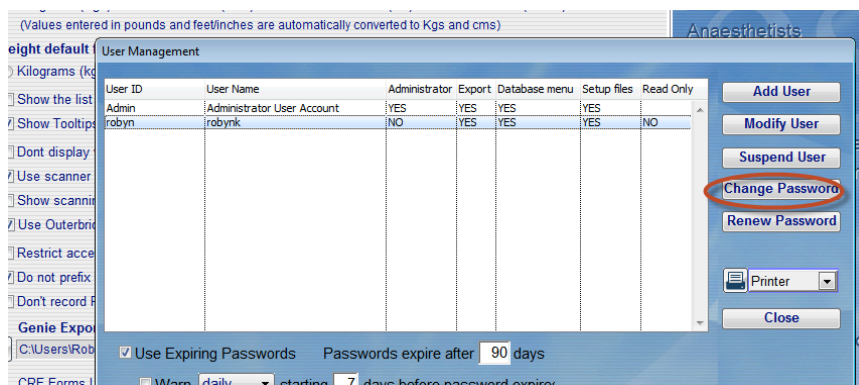
Select "Modify User", type in your current password, and then the new password. A user who is not an administrator can change their password - see below.
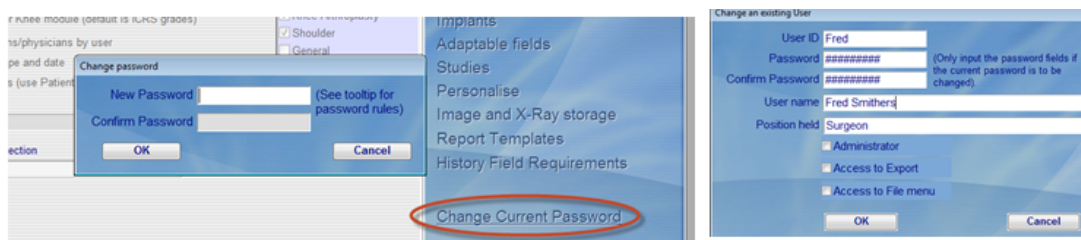
Renewing a password expiry

To renew the expiry date for an individual user, click on Renew password.
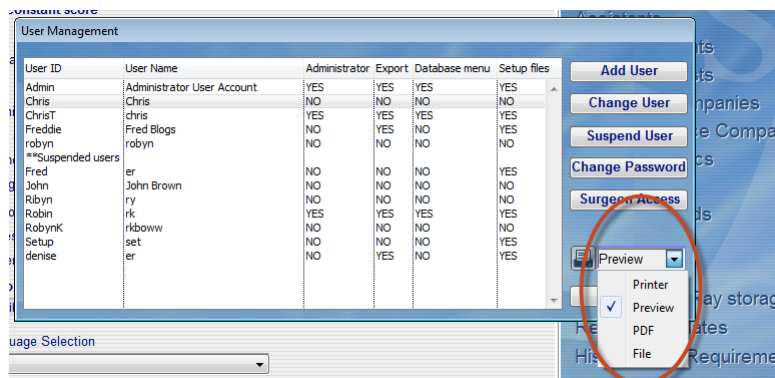
Changing other user details

Select "Modify User" to change any of the details

Forgotten Password?

If you've forgotten your password (it happens to the best of us), firstly, consult your clinical administrator who should be able to log in and help you create a new one. If that fails email us on **info@socratesortho.com**. We'll provide you with another one to get you back into the system again, and you can then change it to a new password.

DISPLAYING/PRINTING THE USER LIST

The printer icon allows you to either print, preview, create a PDF document, or export the list of users and details to a text/Excel file.