MediRoutes Identity Account Documentation

The purpose of this document is to explain how to use the new features of the MediRoutes Identity Account system. What is an Identity Account? Identity Accounts are accounts that are more secure than current accounts. They do not replace the current accounts, but rather, they serve as a newer and safer way for clients to log in and manage their accounts. *Identity Accounts are completely separate from current client accounts.* This means that one type of account can exist without the other.

This document will refer to two types of administrators. **ScheduleViewer Administrator** accounts are accounts owned by ScheduleViewer employees for the purposes of managing clients. **Dispatch Administrators** are accounts owned by clients for logging in to MediRoutes and managing drivers, trips, etc.

This document will cover the following topics:

- Logging in
    - Logging in to the existing Mediroutes Silverlight app
    - Logging in to the new MediRoutes Account Portal
    - Login security
- Basic account Settings
    - Changing passwords
    - Confirming an email address
    - Recovering forgotten passwords
- **ScheduleViewer Administrator** abilities
    - Creating new client accounts
    - Forcing an account's password to reset
- Client account abilities
    - How a client will add new **Dispatch Administrator**

Logging In

Logging in to the existing Mediroutes Silverlight app

This process should be appear different from the user perspective, but it is important to understand how the process works nonetheless. Below is the login window for the Silverlight app.

When a user successfully logs in, an important thing happens. *If the user does not already have an Identity account, one will be automatically created for them*. This happens without the user knowing, so account migration is done completely behind the scenes. If a user *does* have an Identity account, this step is not performed.

Logging in to the new MediRoutes Account Portal

To log in to the MediRoutes account portal, first go to https://sp.mediroutes.com (or wherever the portal is hosted). Then, click on the "Log in" text to the top right of the page.
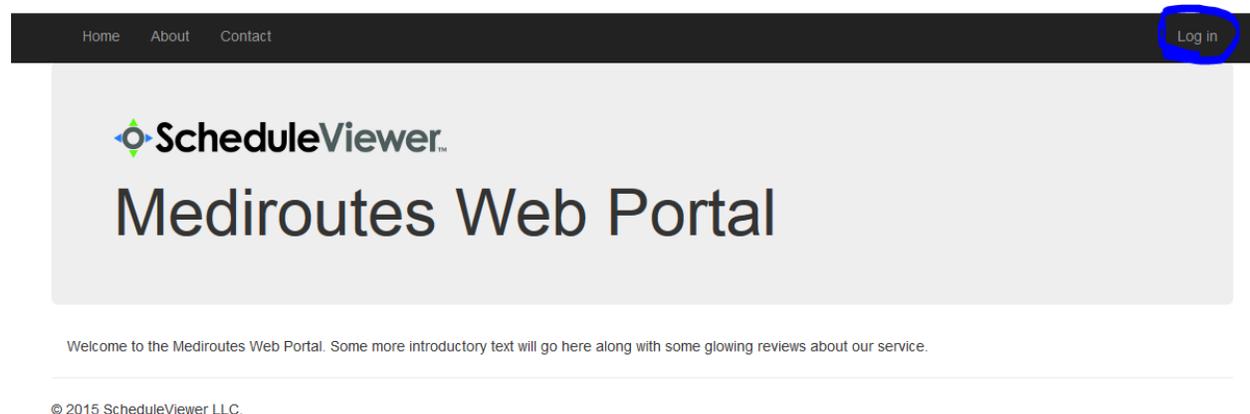
You will then be redirected to the following page:

Here, you should enter the email and password associated with the Identity account to log in as. Note, that unless an account exists as Identity, it will not be able to log in. This means that for clients, *until they have logged in to the Silverlight app (and have had an Identity account migrated), they will not be able to log in through this page*.

Login Security

For safety, if an incorrect password is given during login 5 times in a row, the account will be disabled for 5 minutes. This occurs both when logging in to the Silverlight app and when logging in to the web portal. When logging in to the Silverlight app locks out, the user will get a generic message "Invalid Username/Password". However, when logging in to the web portal, users will see the following:

Basic Account Settings

To access the basic account settings, a user must first log in. Then, they can click on their email address in the top right corner of the screen to manage their account.
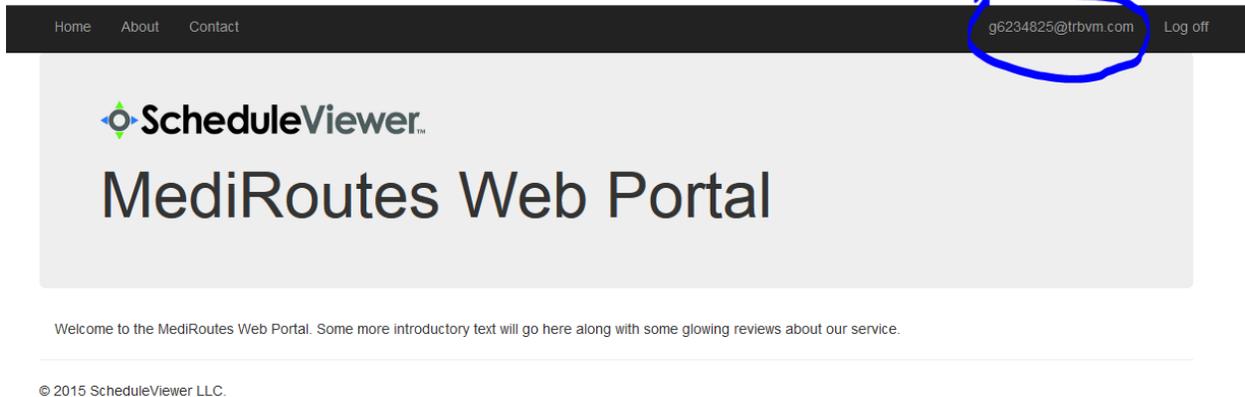
The user will then see the following screen:
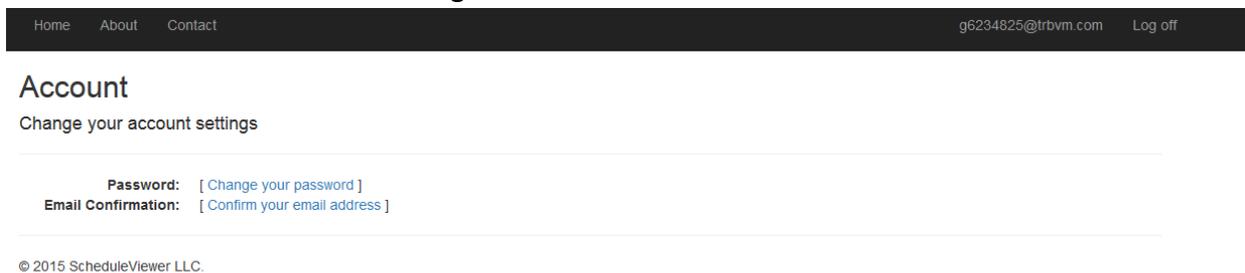
If the user has already confirmed their email address, the email confirmation option will not apprear.

Changing Passwords

Due to the security features of Identity Accounts, the only person allowed to directly change a user's password is that same user. There are two ways for a user to change their password. The first is directly through the account portal. To change a password in this manner, first go to the account setting page and select "Change your password".   This will take you to the following page:

Here, the user must specify both their old password and their new password.

The second way to change an account's password is through the Silverlight app. The highlighted section below demonstrates where the user can click to change their password:

The user will then be taken to the web portal login page. If they log in successfully, they will be automatically redirected to the change password page.

Confirming an email address

For added security, Identity accounts support confirmed email addresses. Once an email address has been confirmed, it can receive automatic messages from the system. When an old style account is migrated to an Identity account, the email is not confirmed. It is important for security that the account be confirmed as soon as possible. To manually confirm an email address, go to the account settings page and select "Confirm Your Email Address". Upon successful completion, you will be presented with the following page:
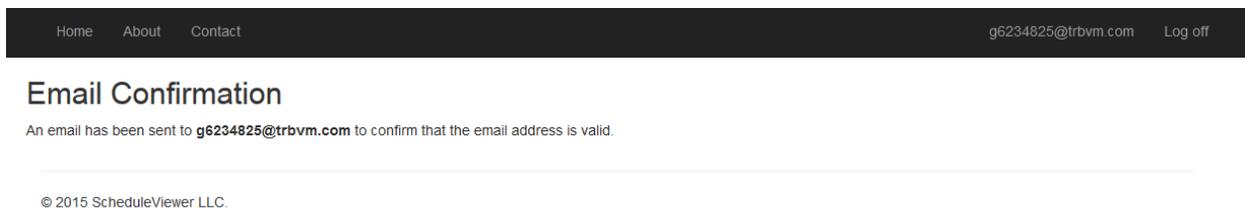
The address will then get an email containing a link they can follow, and when it's clicked, the address will be confirmed.

Recovering Forgotten Passwords

Due to the security features in Identity Accounts, it is possible for an account holder to reset their password without needing the help of a **ScheduleViewer Administrator**. To do this, a user only needs to click on "Forgot Password?" in either the web portal login screen, or the Silverlight app login screen. This will take them to the following page:
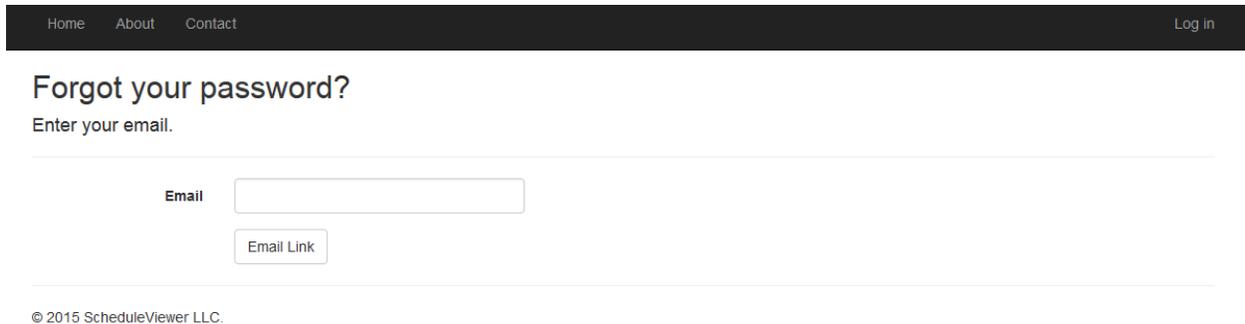
Here, the user can enter their email address. If their email address has been confirmed, they will be emailed a link. Clicking on the link will take them to a page where they can reset their password to something new. If the user's email address has not been confirmed, they will be asked to contact a **ScheduleViewer Administrator** for help. Here is the page they will see:


The process by which a **ScheduleViewer Administrator** can manually force a password reset will be explained in the next section.

ScheduleViewer Administrator abilities

If a user is a **ScheduleViewer Administrator**, they can access more features to manage client accounts. To get to the client management page, log in with a **ScheduleViewer Administrator** account and click "Manage Accounts" in the top right corner of the screen:
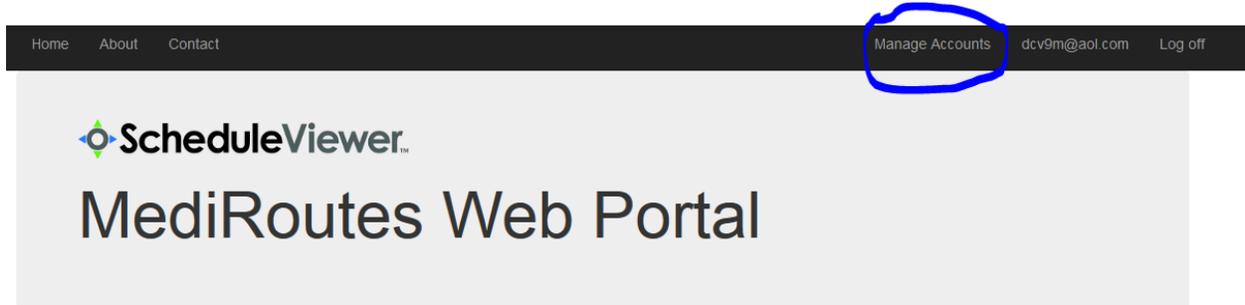
You will then be taken to the following page:
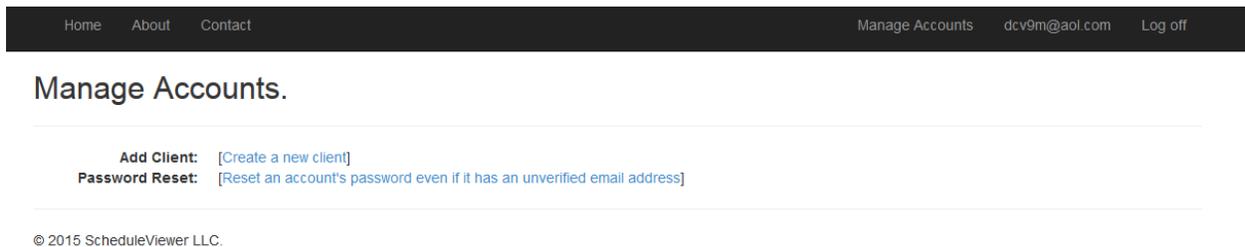
Adding new clients

To add a new client, select "Create a new client" from the manage accounts page. The next page should look like this:

Client Registration

Company Information

Company Name

Time Zone   (UTC-12:00) International Date Line West ⌄

Address line 1

Address line 2

City

State

Zipcode

Primary Contact Information

First Name

Last Name

Phone Number

Email Address

This is the email address that you will use if you ever need to log in to mediroutes to manage the client's account. It does not need to be a valid email address, but it must be unique. We recommend something like: Daniel.Vukelich@ClientCompanyName.com

Account Management Email

Create

The company information boxes should be filled with relevant information about the company. The Primary contact information section is for communication data with the client. Note that the Primary Contact Email address should be a valid email address. The important part to get right is the Account Management email address. If the client is having difficulties and needs support in the Silverlight app, then you should log in using the email specified here. This address does not need to be a valid email, but it should be unique. *That is to say, this email address should not be the same as any other email address in the system.*

Once the above information is filled out, several things will happen:

The client will get an email welcoming them to MediRoutes and asking them to set their password. They will be automatically provided with a link to confirm their email address.

The **ScheduleViewer Administrator** who created the new client account (you) will get an email. This email will remind them of the Account Management Email address that they have selected, and it will give them a default password. To change this default password, they can log in to the web portal with the account management email they specified and the default password given in the email they received. Then, go to account settings and change the password.

Forcing an account's password to reset

If a client forgets their password and they have not confirmed their email address, they will have to contact a **ScheduleViewer Administrator** to force a password reset. This will require that the client give an email address that they know they can access (which could be the same address as the unconfirmed one tied to their account). To force a reset, go to Account Management and click "Reset an account's password even if it has an unconfirmed email". You will then see the following page:
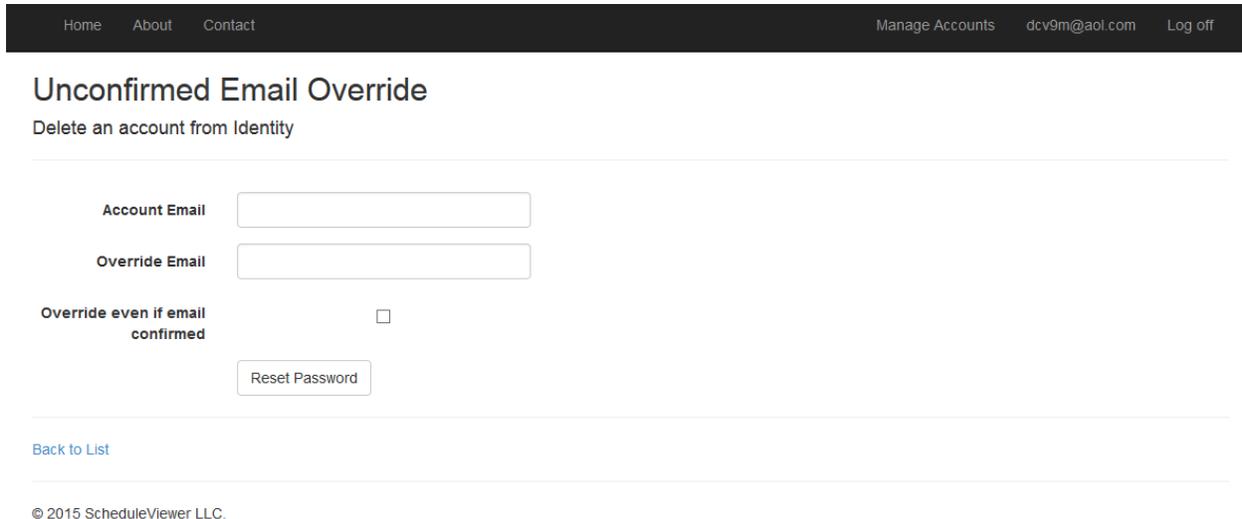
"Account Email" is the email address tied to the client's Identity Account. "Override Email" is the email address that the reset code will be sent to. *Override Email must be a valid email address, but it does not have to be different from "Account Email".* When the email address

In the interests of security, there is a checkbox for "Override even if email confirmed". This is to be used only in extreme cases where the user has confirmed their email address, but they forgot their password and do not have access to their account email address. The override can only occur if the **ScheduleViewer Administrator** performing the action is logged in as so-called "SuperAdmin". Other capabilities of the SuperAdmin are outside the scope of this document.

Client Account Abilities

<u>How a client will add new **Dispatch Administrator**</u>

Clients can create Identity accounts for their own employees as well. They can create **Dispatch Administrators** to manage runs, drivers, and schedules through the Silverlight app. **Dispatch Administrators** have the same abilities as normal client accounts. The only difference is that they are created by clients, not by **ScheduleViewer Administrators**. To add a new **Dispatch Administrator**, a client first must log in to the Silverlight app. Then, by going to "admin" in the top right they can select "add new". They will be presented with the following screen:

Here they can fill out the details for their new employee. To specify it as a **Dispatch Administrator**, the client should not select the "Driver" checkbox. Once they click 'OK', the client should receive a message about an email being sent to the new employee. This email is identical to the new client email address, and will allow them to confirm their email address and set their password.