

# User Manager Manual

# myWSI



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## Definitions

**Scope Type:** the means to group Scopes together which are similar. Examples are Employer, Medical Provider and Injured Worker. These will be defined and are unable to be modified by User Manager.

**Scope:** myWSI defines each organization or business (legal entity) as a scope. myWSI filters the information that a user is permitted to view by the scope that they are assigned. Examples are Applebee's, Sanford Health, or Basin Electric. These will be defined and managed by WSI Administrator.

**Role:** myWSI defines the set of permissions and available actions within a role. Users may have the ability to delegate or revoke roles for other users. Roles are organized by Scope Types and are assigned to specific Scopes. Examples are; WSI User Manager, Invitation Manager, OEA User. These will be defined and managed by WSI Administrator. WSI Administrator: manages the technical aspects of myWSI.

**Invitation:** a communication to delegate permissions to another user by sending them a Role. A User will need to use the code in the invitation to claim the Role. Invitations will be able to be created by User Manager.

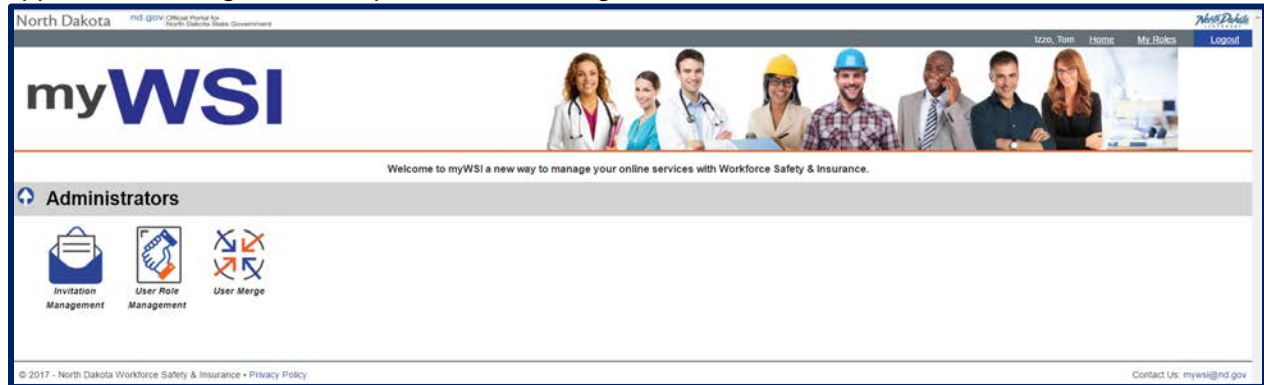
**Delegate:** the ability to assign a permission (Role) to another User. This is decided in the Invitation creation. This is a function that will be managed by a User Manager.

**Revoke:** the ability to remove a permission (Role) from another user. This is decided in the Invitation creation. This is a function that will be managed by a User Manager.

# User Manager Home Page

*Roles Needed: WSI User Manager*

The Home Page is a portal to the rest of the functions of myWSI where users will access applications, navigate to accept invitations, navigate to revoke roles, and much more.



In the screenshot above, are administrator applications that each have a specific purpose to administering myWSI. The sections below will go into detail on each of the applications.

## Invitation Management

- This application is the central location for managing created invitations. In this application you will be able to:
  - View details about Invitations
  - Cancel Invitations
  - Reissue Invitations

## User Role Management

- This application is the central location for managing roles for users. In this application you will be able to :
  - Create Invitations
  - View User Role Information
  - Assign Roles
  - Revoke Roles

## User Merge

- This application is the central location for taking all roles for one user and merging them into another user. In this application you will be able to:
  - Merge one user roles to another

# User Role Management

*Roles needed: WSI Administrator or WSI User Manager.*

The User Role Manager ties roles and scopes to an invitation that can be sent to a user to be claimed or assign roles and scopes directly to a user in the myWSI portal.

The User Role Manager has the following two actions:

- **Create Invitation**
- **View/Assign Roles**

Before a user can perform the above two actions, they must first execute a search for the user they are looking for.

The myWSI User Managers screen provides a search screen to type in a first name, last name, or email address.

The screenshot shows the 'User Role Management' search interface. It includes a breadcrumb 'Home » User Role Management' and a title 'User Role Management'. Below the title are three input fields labeled 'First Name:', 'Last Name:', and 'Email:'. A blue 'Search' button is positioned below the 'Email' field.

*Note: The values typed in must be exact matches. Partial or wildcard searches will not return the wanted results.*

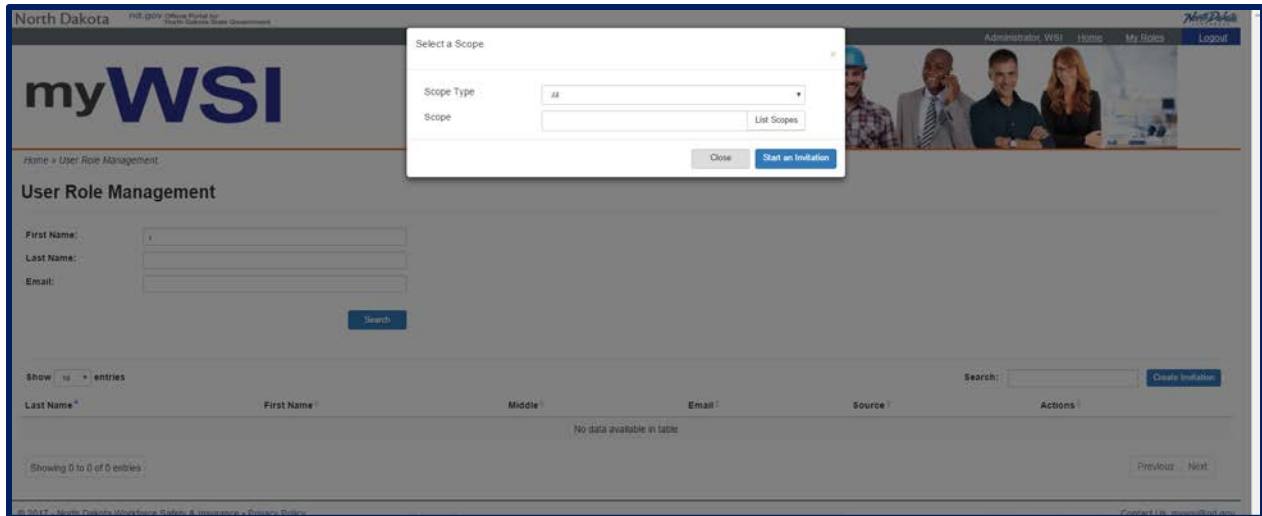
## Create Invitation

*Note: Users can create invitations for all roles that have Can Delegate in the Role Manager. If a Role does not have the Can Delegate option in the Role Manager, an administrator must directly assign it to the user.*

The screenshot shows the 'User Role Management' search results page. It includes a breadcrumb 'Home » User Role Management' and a title 'User Role Management'. Below the title are three input fields labeled 'First Name:', 'Last Name:', and 'Email:'. The 'Email' field contains the text 'temployee-1@nexusinnovations.com'. A blue 'Search' button is positioned below the 'Email' field. Below the search form, there is a table with columns: 'First Name', 'Middle', 'Last Name', 'Email', 'Source', and 'Actions'. The table contains one entry for 'Richard B Pitino' with email 'temployee-1@nexusinnovations.com' and source 'NdlLogin'. The 'Actions' column has a 'View Roles' link. At the bottom, there is a 'Showing 1 to 1 of 1 entries' message and a pagination control with 'Previous', '1', and 'Next' buttons.

First Name	Middle	Last Name	Email	Source	Actions
Richard	B	Pitino	temployee-1@nexusinnovations.com	NdlLogin	View Roles

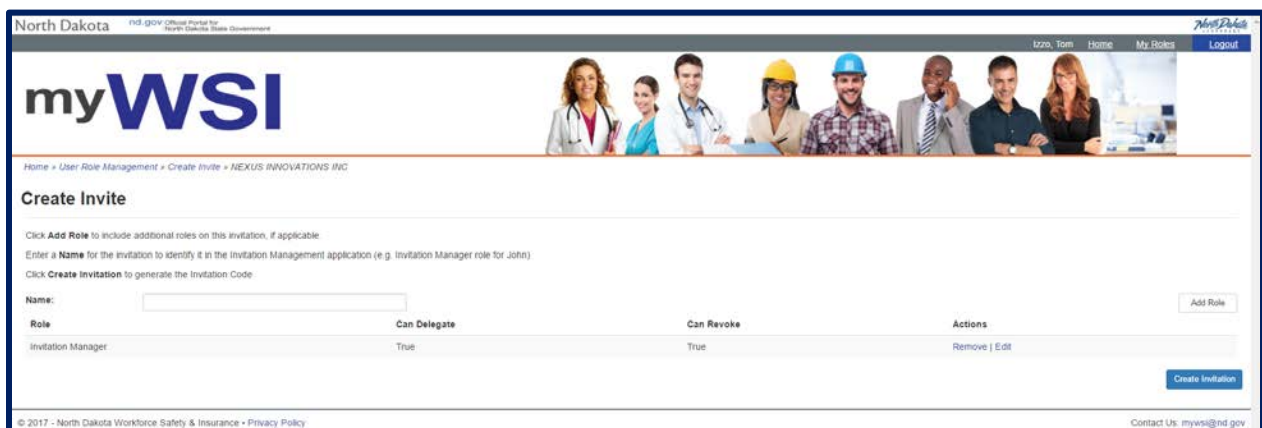
After searching for the user, clicking the **Create Invitation** button will bring up the **Select a Scope** dialog box to select a specific scope type and scope for the role.



The Create Invitation screen will display. Locate the role to create an invitation for in the Create Invitation grid and the action of Invite.



Clicking **Invite** will bring user to the **Create Invite** screen.



- **Name:** The name of the invitation. This will not be seen by the user receiving the invitation, but instead will be used to manage the invitation within the Invitation Management application.

To add more roles to the invitation, click the **Assign Role** button. A user can only add roles within the same scope type and scope first selected to create an invitation.

**Remove** will remove that role from the invitation.

**Edit** allows editing the Can Delegate and Can Revoke options.

Lastly, the **Create Invitation** button will create the invitation. This will bring user to the Invitation Confirmation screen.

*Note: A user does not need to send an email. When a user reaches the Invitation Confirmation screen, the invitation has been created and user is able to manage the invitation within the Invitation Management application.*

- **Email:** myWSI will send the invitation to this email address.
- **Internal Comments:** Additional comments user wants associated with the invitation in the Invitation Manager application.

The **Send Message** button will send the invitation to the email user provided above and will lead user to the Invitation Confirmation screen. The recipient of the invitation will receive an email containing the invitation code and a separate email containing the instructions in how to use the invitation code.

## View/Assign Roles

After searching for and locating the user, user will have the action of **View Roles**.

Home » User Role Management

### User Role Management

First Name:   
 Last Name:   
 Email:

Show 10 entries Search:

First Name	Middle	Last Name	Email	Source	Actions
Richard	B	Pitino	employee-1@nexusinnovations.com	NdLogin	<a href="#">View Roles</a>

Showing 1 to 1 of 1 entries  1

Clicking **View Roles** will bring up the user's Role Assignment screen.

The Role Assignment grid will display all the roles the user has along with the role's scope type and scope. The user will have the action of **Revoke** on each role.

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myWSI

Home » User Role Management » Role Assignment - Richard Pitino

### Role Assignment - Richard Pitino

Show 10 entries Search:

Role	Scope Type	Scope	Actions
Invitation Manager	Employer	BLAIN CHRISTIANSON & ASSOCIATES	<a href="#">Revoke</a>
OEA User	Employer	ANCHOR CHRISTIAN COUNSELING INC	<a href="#">Revoke</a>
OEA User	Employer	8TH STREET FLATS LLC	<a href="#">Revoke</a>

Showing 1 to 3 of 3 entries  1

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Clicking **Revoke** will revoke the role for the user.

Clicking **Assign Role** will create a dialog box.

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Home » User Role Management » Role Assignment - Richard Pitino

### Role Assignment - Richard Pitino

Show 10 entries Search:

Role	Scope Type	Scope	Actions
No data available in table.			

Showing 0 to 0 of 0 entries

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Assign Roles

Role:

Scope Type:

Scope:

Can Delegate:

Can Revoke:

- **Role:** A dropdown to select the desired role.
- **Scope Type:** A dropdown to select the desired scope type for the role.



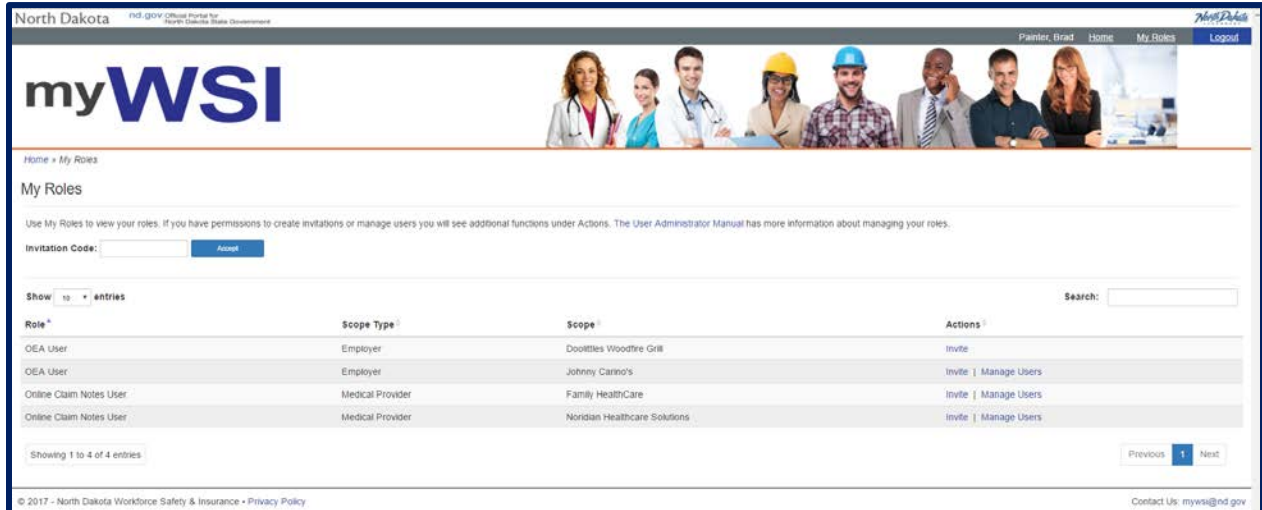
- **Scope:** A search box that will search for a specific scope corresponding to the scope type selected above. Must type at least three letters before clicking “List Scopes”.
- **Can Delegate:** A checkbox that when selected marks that the user will be able to delegate this role for the specific scope type and scope selected above. Unchecking does not allow the user to delegate the role.
- **Can Revoke:** A checkbox that when selected marks that the user can revoke the role from any user that has that role for the specific scope type and scope selected above. Unchecking does not allow the user to revoke the role from any users.

After assigning the desired roles, make sure to click **Save** to save changes.

## My Roles

*Roles needed: All roles can access My Roles.*

The My Roles screen is to delegate roles or to manage users for roles that are specific to the authenticated user.



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### myWSI

Home » My Roles

**My Roles**

Use My Roles to view your roles. If you have permissions to create invitations or manage users you will see additional functions under Actions. The User Administrator Manual has more information about managing your roles.

Invitation Code:

Show 10 entries Search:

Role*	Scope Type <sup>1</sup>	Scope <sup>1</sup>	Actions <sup>1</sup>
OEA User	Employer	Dooittles Woodfire Grill	Invite
OEA User	Employer	Johnny Carino's	Invite   Manage Users
Online Claim Notes User	Medical Provider	Family HealthCare	Invite   Manage Users
Online Claim Notes User	Medical Provider	Nordian Healthcare Solutions	Invite   Manage Users

Showing 1 to 4 of 4 entries

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The My Roles screen can allow up to two actions:

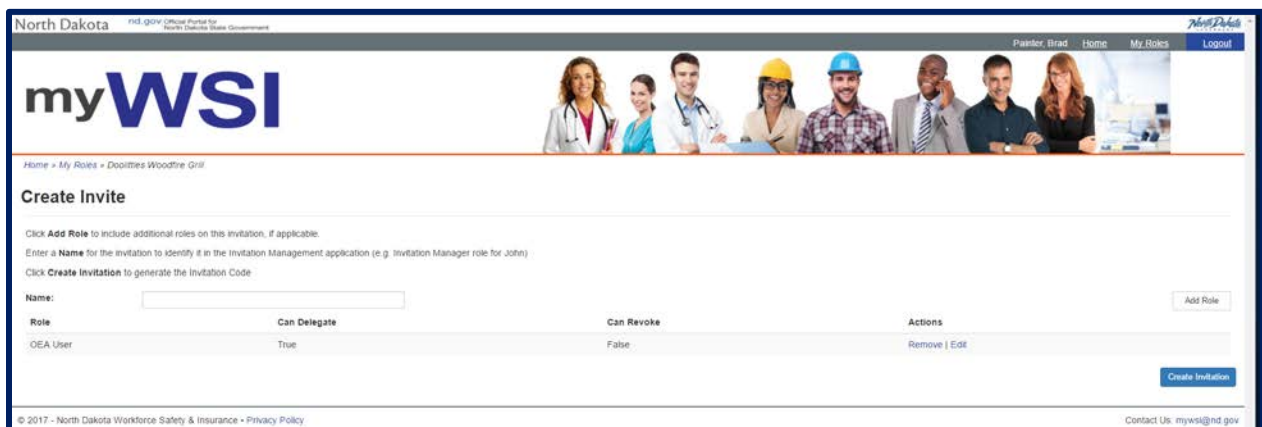
- **Invite**
- **Manage Users**

### Invite

*Note: A user may only invite other users to roles that have Can Delegate enabled.*

Locate the role that has Can Delegate and user will have the action of Invite.

Clicking **Invite** will bring user to the Create Invite screen.



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### myWSI

Home » My Roles » Dooittles Woodfire Grill

**Create Invite**

Click **Add Role** to include additional roles on this invitation, if applicable.

Enter a **Name** for the invitation to identify it in the Invitation Management application (e.g. Invitation Manager role for John).

Click **Create Invitation** to generate the invitation Code.

Name:

Role	Can Delegate	Can Revoke	Actions
OEA User	True	False	Remove   Edit

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- **Name:** The name of the invitation. The user receiving the invitation will not see this name. The Invitation Management applications uses the name to organize invitations.

To add more roles to the invitation, click the **Assign Role** button. A user can only add roles within the same scope type and scope first selected to create an invitation.

**Remove** will remove that role from the invitation.

**Edit** allows editing of the Can Delegate and Can Revoke options.

Lastly, the “**Create Invitation**” button will create the invitation. This will bring user to the “Invitation Confirmation” screen.

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Administrator, WSI Home My Roles Logout

# myWSI

Home » User Role Management » Create Invitation » Invitation Confirmation

## Invitation Confirmation

**Code: DVE3-E4WK-2R27**

The above code is available for use.  
To email this code to a user, enter the users email address.  
Use the **Internal Comments** field to document additional information about the invitation. This information is viewable only by your organization's invitation manager(s).

Email:

Internal Comments:

[Send Email](#)

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*Note: A user does not need to send an email. When user reaches the Invitation Confirmation screen, the invitation has been created and user is able to manage the invitation within the Invitation Management application.*

- **Email:** myWSI will send the invitation to this email address.
- **Internal Comments:** Comments user wants associated with the invitation in the Invitation Manager application.

The **Send Message** will send the invitation to the email user provided above and will lead user to the Invitation Confirmation screen. The recipient of the invitation will receive an email containing the invitation code and a separate email containing the instructions in how to use the invitation code.

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Painter, Eric ✓ Successfully sent the invitation

# myWSI

Home » My Roles » Invitation confirmation

## Invitation confirmation

**Code: UMST-JLGS-HLBA**

An email was generated for this invitation with the above code. The user will need to log into myWSI to claim the Role assigned in the invitation.

Comments:  
Test verbage

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## Invitation Management

*Roles needed: WSI User Manager, or Invitation Manager. The application was specifically built for these three roles and even if the application is edited in application management other roles cannot be used. A coding change is needed to add or remove these roles from being able to be used for Invitation management.*

The purpose of the Invitation Manager is to manage invitations that have been generated based on scope type and scope in the myWSI portal.

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# myWSI

Home » Invitation Management » Scope » Invitations

Invitations

Employer - NEXUS INNOVATIONS INC

Below is a list of all active invitations. Use the fields below to refine the search by date and/or status.

Start Date:

End Date:

Status:

Show: 10 entries

Search within results:

Code	Name	Email	Status	Date	Actions
B855-6EEK-ZL3B	Test Invite		Active	6/6/2017	View   Cancel

Showing 1 to 1 of 1 entries

Previous 1 Next

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The Invitation Manager allows the user to perform three actions:

- **View Invitations**
- **Cancel Invitations**
- **Re-Issue Invitations**

Before the user can perform the above three actions, they must select a scope type and scope.

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# myWSI

Home » Invitation Management

## Invitation Management



Search by Scope

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WSI User Managers will be given a search screen to select a specific scope type and scope. The search button will appear once both fields are valid.

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Administrator, WSI Home My Roles Logout

# myWSI

Home > Invitation Management > Select a Role Scope

Select a Role Scope

Scope Type:

Scope:  [List Scopes](#)

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Invitation Managers will be shown a grid with the specific scope types and scopes they have access to.

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Administrator, WSI Home My Roles Logout

# myWSI

Home > Invitation Management > Select a Role Scope

Select a Role Scope

Scope Type:

Scope:  [List Scopes](#)

Scope Name\*

CONEXUS EHC LP
CONEXUS CORP
NEXUS CAPITAL CO
NEXUS INNOVATIONS INC
NEXUS SECURITY SOLUTIONS
NEXUS STAFFING SOLUTIONS

Showing 1 to 6 of 6 entries [Previous](#) [Next](#)

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After the user has selected the correct scope type and scope, the user can then search for a specific invitation.

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Administrator, WSI Home My Roles Logout

# myWSI

Home > Invitation Management > Scope > Invitations

## Invitations

Employer - NEXUS INNOVATIONS INC

Below is a list of all active invitations. Use the fields below to refine the search by date and/or status.

Start Date:

End Date:

Status:

[Search](#)

Show  entries

Code	Name	Email	Status	Date	Actions
B855-6EEK-ZL3B	Test Invite		Active	6/6/2017	<a href="#">View</a>   <a href="#">Cancel</a>

Showing 1 to 1 of 1 entries [Previous](#) [Next](#)

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Use the below fields to filter the search:

- **Start Date:** Select a date that will filter the Invitation Management grid to display invitations that were created on or after the date selected.

- **End Date:** Select a date that will filter the Invitation Management grid to display invitations that were created on or before the date selected.
- **Status:** Select a status that will filter the Invitation Management grid to display invitations based on the invitation's status. The four statuses are:
  - **Active:** The invitation code is able to be accepted by a user.
  - **Claimed:** The invitation code has been accepted by a user. The invitation code cannot be used to claim a role.
  - **Cancelled:** The invitation has been cancelled by an invitation manager. The invitation code cannot be used to claim a role.
  - **Expired:** The invitation has reached its 30 day active limit. The invitation will become expired and the code cannot be used to claim a role.

*Note: The Invitation Manager is not where invitations are created. The Invitation Management application only manages already created invitations. User Role Management or My Roles are the locations that invitations can be created.*

## View Invitations

The user is able to view information of any invitation that has been created within the selected scope type and scope. Locate the invitation in the Invitation Management grid and you have the action of "View".

Clicking **View** will produce a dialog box of various information of the invitation.

- **Code:** The invitation code that was created for the specific role and scope the user will use to accept the role.
- **Name:** The name of the invitation.
- **Email:** Email address the invitation was sent to.
- **Status:** The current status of the invitation.
- **Internal Comments:** The comments that were entered by the user who created the invitation.
- **Assigned by:** The user's name that created the invitation.
- **Claimed by:** The user that claimed the invitation.
- **Issued Date:** The date the invitation was first issued/sent.
- **Claimed Date:** The date the invitation code was claimed.
- **Expired Date:** The date the invitation will expire/did expire.

## Cancel Invitations

After an invitation has been sent and is still marked as "Active" you can cancel the invitation. Locate the invitation in the Invitation Management grid and you have the action of "Cancel".

Clicking **Cancel** will cancel the invitation and the invitation code cannot be used to claim a role.

## Re-Issue Invitations

After an invitation has reached its 30 day active limit, it will become "Expired". You are able to re-issue an expired invitation to the user. Locate the invitation in the Invitation Management grid and you have the action of "Re-Issue".

Clicking **Re-Issue** will re-issue the invitation to the user and the invitation code can now be used to claim the role.

# User Merge

*Roles needed: WSI User Manager.*

The purpose of User Merge is to transfer the myWSI roles from one user to another.

An example would be that a user has inadvertently created multiple NDLogin accounts, has myWSI access through both of them, and wants to consolidate these accounts into one.

The User Merge allows the user to perform one action:

- **Merge Accounts**

## Merge Accounts

Clicking **Choose** will open a user search dialog box.

- **Source User:** Search for a user based on First Name or Last Name. Roles will be taken from the Source User and moved to the Target User. The Source User will no longer have any roles.
- **Target User:** Search for a user based on First Name or Last Name. The Target User will be receive the roles of the Source User. If the Target User had pre-existing roles before the merge, those roles will remain in addition to the Source User's roles.