

Transcriptionist Software Training

KB247

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Introduction

In this guide, you will learn how to grant users Secure Web Portal access to viewing authors' reports as well as the option to Edit Completed Jobs for specified authors. For more information on Editing a Completed Job, please refer to [KB246](#) "How do I Edit a Completed Job". By Default a Facility Administrator has access to all jobs for a Facility and Authors have access to only their own work.

Overview

InfraWare 360 allows Administrators to manage access of author's reports in the Secure Web Portal. When granting access for a given author, a user can be given permission to:

- View Completed Jobs
- View All Jobs
- Edit Completed Jobs

Note: Users with the role of Facility Administrator for a Facility have the ability to see all reports under that Facility without this feature. You will see a message that says "User has no Portal Permissions Set" because no specific access has been identified; however, they will see all reports for a facility and do not require explicit permissions to be identified.

Portal Permissions: Lola Fairholm

Select the Authors for whom this user should be able to see and/or edit reports

Account: Facility:

(User has no Portal Permissions set)

Requirements

You will need the following before you begin:

- An Administrator login ID and password for the IMC.

Tasks

- Log in to the IMC at www.InfraWare.com/IMC.
- On the Administrator tab, choose the Users sub-tab.
- Choose the author you would like to manage.
- Scroll down to the Facility Roles section and click the [Manage »](#) link next to Portal Permissions.

- **Choose Permission Level:** Portal Permissions can be added for an Author, Location, or Author Pool.

- **Location:** Choose a Facility from the drop-down menu and then choose Location from the Permissions for drop-down menu. If Locations have been set up for that Facility

- **Author:** Choose a Facility from the Facility from drop-down menu. Choose **Author** from the **Permissions for** drop-down menu and then select an Author from the drop-down menu whose jobs you would like the User to have permission to access.

- **Author Pool:** Leave the Facility drop-down menu set to All. Choose from the **Permissions for Author Pool** drop-down menu. This option should be used cautiously, as there is a risk of non-compliance by allowing documents to be accessed across facilities in some circumstances.

- Choose what they can do:
 - Choose Can View Completed Jobs **OR** Can View All Jobs.

- Choose Can Edit Completed Jobs if you would like the user to have access to edit jobs after completion.
- Click the **Add Permissions** Button.
- Repeat this step for each Author or Pool for which you want to grant access to this user.
- Close the window.

Note

If you select All Facilities, this feature allows you to manage permissions for Author Pools. This option should be used cautiously, as there is a risk of non-compliance by allowing documents to be accessed across facilities in some circumstances.