CRStar Insights
System Administration and User Maintenance Policy

In 2017, we announced new security features that allow the system administrators of a facility to add and delete users and maintain passwords in both CRStar and in the CRStar Client Portal. At that time, we announced that these functions would become the responsibility of client CRStar administrators.

Over the past few months, we have noticed an increase in support tickets requesting assistance with the tasks outlined above. This increase is causing us to enforce our policy more stringently.

Effective immediately, when a ticket is submitted requesting assistance to add, delete or unlock users, we will refer the requestee back to the admin of the CRStar account for assistance. We will be happy to assist the admin of the account on how to complete the requested task. Admins - Please feel free to submit a support ticket.
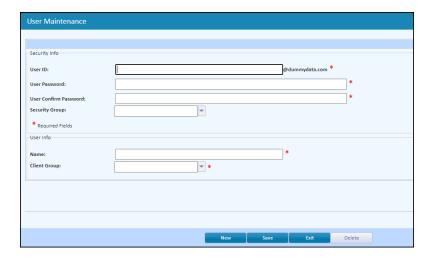
Instructions for adding/deleting/managing users in the Client Portal are located on the Resources page under "Policies and Procedures" ("CRStar Client Portal Instructions"). This document contains instructions for managing users in CRStar.

System Administration – Security Maintenance (CRStar User Logins)

The System Administrator can access the security maintenance tab by going to System Administration, then Security Maintenance. This is accessible to any user who is part of the "Client Admin" security group. If a user is not designated as an admin, the user does not have access to these functions.

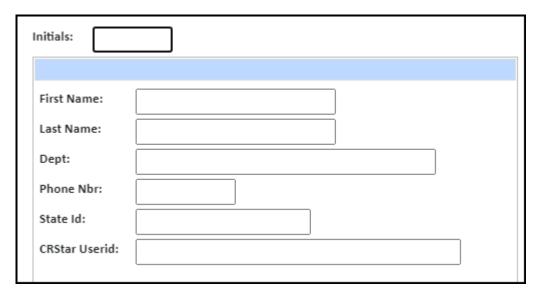## CRStar User Logins – Create/Delete/Modify

Create a new login - Click on User Logins and then click on the New User button and the following screen will appear:

- Enter a User ID for the new user. This is not case sensitive, but it is recommended that it is all lower case and follow the pattern of the user's first initial followed by last name
- The @ers###.com will automatically be added as this is specific to each database (Note: Above example uses "@dummydata.com")
- Enter a password (this password forces a reset the first time the user logs in)
- Confirm the password
- Select the appropriate security group for this user
- Enter the user's full name (First and Last Name)
- Select the client group
- Click SAVE
- Exit or select NEW to enter another new user

After the user's name has been created, the System Admin must add the registrar's initials under System Management > Registrars:

Initials:	
First Name:	
Last Name:	
Dept:	
Phone Nbr:	
State Id:	
CRStar Userid:	

- Enter the registrar initials (can be 2 or 3 characters)
- Enter the registrar's first name and last name
- Dept. and Phone Nbr are optional fields
- Enter the State ID if your state requires it (if not, leave blank)
- The CRStar User ID should be first initial, last name then @ers#.com. For example: jdoe@ers0601.com.
- Click "Save"

IMPORTANT: DO NOT FAIL TO COMPLETE THIS STEP! If this step is not completed, the registrar's initials will not automatically save when a case is abstracted, modified, or follow up entered. This is a crucial step!

Delete a User ID - Once a User ID has been created, the actual USERID CANNOT be MODIFIED and/or CHANGED. If a change does need to occur, a NEW User ID must be created to make that change. Then the old User ID can be deleted.

- Select User Logins and search for the Username to delete, then select the name
- Once the User ID is selected, click the DELETE button. A message will pop up asking for confirmation
- Select "yes" if this is the User ID you wish to delete

IMPORTANT: Do not delete the Registrar's Initials in System Management! It is important to leave those initials for historical purposes.

Modify an Existing User ID – every modification MUST include a password change (this form CANNOT be saved until a new password has been entered). The user is prompted to change it when they login again. Other modifications that can be made are changes to the Security Group and/or the spelling of the user's name.

Only one client group choice exists so this may not be changed. After the changes have been made and the password has been entered, click "Save".

Security Maintenance (User Security - Hide Screens/Tabs)

The User Security Definition allows the administrator of the system to limit access to different functions in CRStar. This function hides the screens (tabs) per user.

IMPORTANT: Do not change anything if there are no limitations to the user.

To make changes, follow the steps below:

- Click on System Administration > Security Maintenance > User Security. Choose the user's name.
- Highlight each function that will be removed from the user. Use the > option to move the tab to the unavailable side.
- Click Save and Exit
- When the user signs in, changes are immediately seen across the top of the abstract. See screen shot below.

For detailed instructions on all Security Maintenance options, please refer to the CRStar User Manual (available on the Resource Page under "Training").

Support Available at www.mycrstar.com