



Using User Management

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User Management Overview

Users who have been assigned the Manage access level in User Management can add and manage users for the GHX software applications that are available through the GHX single sign on portal (examples are My Exchange Orders and CCXpert). By default, the Customer Administrator role has the Manage access level.

Before you can access User Management, GHX must assign the application to one or more specific administrators within your organization. Contact GHX Customer Care to request that initial access.

Recommended Browsers

For optimal performance, use one of the following supported browsers:

- Google Chrome latest two versions
- Mozilla Firefox latest two versions
- Microsoft Edge latest two versions
- Apple Safari latest two versions

Log In

1. Go to <https://login.ghx.com>. The *GHX Login* page opens.

GHX

GHX COVID-19 Information
COVID-19 (The novel coronavirus) is top of mind for the healthcare community. GHX is operating without any changes or interruptions to service and continues to monitor developments.
Subscribe for live updates: <https://www.ghx.com/covid-19>

GHX Login
Enter your GHX credentials to log in.

User Name/Email Address

Password [Forgot Password?](#)

Login

[New Supplier Registration?](#)
Gain access to Vendor/Supplier Credentialing, Compliance and Contracting requests.

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2. Type your user name in the **User Name/Email Address** field.



Note: Normally, your user name is your email address (for example, mjones@ghx.com).

3. Type your password in the **Password** field.
4. Click **Login**. The *single sign on* page opens.
5. Click **User Management**.

Log Out

GHX recommends that you log out from the top banner menu rather than simply closing the browser window.

1. Click your **user name**. A list of options opens.
2. Select **Logout**.

Change Your Password

1. Click your **user name**. A list of options opens.
2. Select **Profile**. The *Profile* page opens.

GHX User Management

USERS ROLES REPORT

Profile

^ **My Information**

First Name *

Last Name *

Email

Job Title

Work Phone

Mobile Phone

^ **Display Preferences**

Language

Time Zone *

Date Format

Time Format

Date Time Format

[Change Password](#)

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3. Scroll down and click the **Change Password** link. The *Change Password* dialog box opens.
4. Type your existing password in the **Old Password** field.
5. Type the new password in the **New Password** field.

What are the password rules?

- At least eight characters in length
- Must contain three of the following four attributes:
 - Upper case letters (A-Z)
 - Lower case letters (a-z)
 - Numbers (0-9)
 - Special characters (for example, #, &, !, \$)
- The new password must not be a password you have used previously

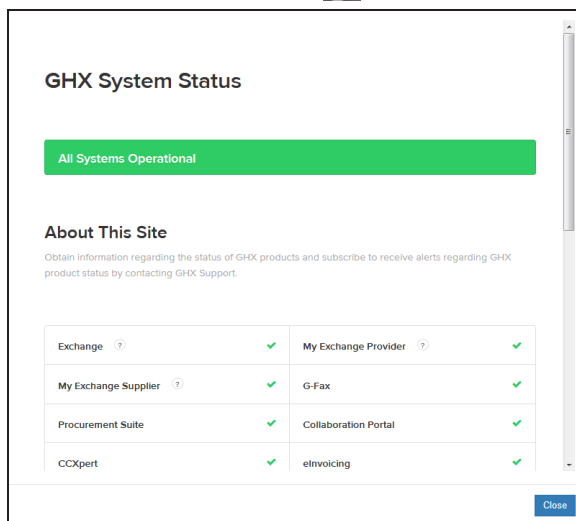
- Passwords expire after 365 days and must be updated at that time

6. Type the same password in the **Confirm Password** field.
7. Click **Set Password**. GHX changes your password.

View System Status

Use the following steps to view the status of GHX products.

1. Click the system status  icon. The *GHX System Status* dialog box opens.



2. Scroll down to view the current status of GHX products and to view past incidents.
3. Click **Close**.

Getting Started

Before using this application, you can customize your user experience by taking the following actions:

1. [Edit your profile.](#)
2. [Set up multi-factor authentication](#) (optional).
3. Decide how you want to sort and display data in [table columns](#).



Tip: When you make changes to the default sort and column structure, those changes become permanent and you will see them the next time you open the application.

4. Consider adding the email address support@ghx.com to your organization's white list. The reason is because the invite email messages originate from this address. This will prevent the messages from ending up in a junk folder.



Tip: If you are logging on to a lower environment (for example, integration), the email address will originate from the noreply@ghx.com mailbox.

Edit Your Profile

You can modify certain information in your profile and display preferences (for example, phone numbers and time zones).

1. Click your **user name**. A list of options opens.
2. Select **Profile**. The *Profile* page opens.

GHX User Management

USERS ROLES REPORT

Profile

^ **My Information**

First Name *

Last Name *

Email

Job Title

Work Phone

Mobile Phone

^ **Display Preferences**

Language

Time Zone *

Date Format

Time Format

Date Time Format

[Change Password](#) [Cancel](#) [Save](#)

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3. Modify the information in the **My Information** area, as needed.



Note: Because your email address is also your unique user ID, you cannot change your email address.

4. Modify the information in the **Display Preferences** area, including the following:
 - **Language** – Select a language
 - **Time Zone** – Options are Greenwich Mean Time (GMT) zones
 - **Date Format** – Options are MM-DD-YYYY, DD-MM-YYYY, and YYYY-MM-DD
 - **Time Format** – Options are 24-hour and 12-hour
 - **Date Time Format** – Shows the results of the selected date and time formats



Note: Display Preferences settings are specific to *your* user ID.

5. Click **Save**.

Manage Columns

You can show, hide, resize, and move columns in tables. When you make changes to the default column structure, those changes become permanent and you will see them the next time you open the application.



Note: Currently, there is no method for returning to the default column settings. Therefore, when you move a column to a new location, it will remain there until you manually move it again.

- To show columns, click the icon (located above the table in the right pane) to open a list of columns and select the checkboxes
- To hide columns, click the icon to open a list of columns and clear the checkboxes
- To resize columns, click between the column headers and drag to the new location, or double-click between the column headers to auto-fit the column size to the content
- To move columns, click the column header name and drag the column to the new location

The screenshot shows the GHX User Management application. The 'Manage Columns' dialog is open, displaying a list of columns with checkboxes to show or hide them. The columns listed are: All, User, Name, Status, Primary Organization, Primary Organization Role, Email, Last Login, Job Title, Time Zone, Locale, Created By, Created On, Updated By, and Updated On. The 'User' column is checked, and the 'Locale' column is also checked. The dialog is titled 'Manage Columns' and has a search bar.

Create a Case

There may be times when you need to notify GHX of a system issue. You can do this by creating a support case.

1. Click the **Create Case** link in the application footer. The GHX Community log in page opens.



Tip: Alternatively, you can click Help and select **Create Case Form** to open the page.

2. Type your user name and password.
3. Click **Log in**.
4. Click **Customer Support > Create Case**. The *Create Case* form opens.

The screenshot shows the 'Create Case' form in the GHX Community application. The form is titled 'Create Case' and is divided into three main sections: 'Contact Information', 'Case Information', and 'Description Information'. The 'Contact Information' section includes fields for First Name (Test2), Last Name (Name), Email Address (test@nome.com), Phone Number, and Company (Nome Community Hospital). The 'Case Information' section includes a dropdown for System Product (My Exchange) and a dropdown for Topic (Select a Topic). The 'Description Information' section includes a Summary field and a large text area for providing information to process the support case. A yellow 'Create Case' button is at the bottom of the form. The footer of the application shows the copyright notice: 2021 Global Healthcare Exchange, LLC. All rights reserved. | Terms of Use | Privacy Policy | User Guidelines.

5. Complete the required fields and click **Create Case**. The system creates a case and routes it to a GHX Customer Care representative.

Icons

The following table contains a list of icons that are available in this application and their descriptions.

Icon	Name	Click to
	Add New	Add an individual user or role
	Bulk Manage Users	Download a Microsoft Excel template you can use to add multiple users in bulk
	Change History	Open the Change History dialog box, where you can search for changes made to user accounts
	Collapse	Collapse a filter pane
	Clear Filters	Clear search filters
	Column sort	Sort data in a table column
	Disable	Disable a selected user or role
	Enable	Enable a selected user or role
	Expand	Expand a filter pane
	Export	Export selected records to a Microsoft Excel file
	Manage Columns	Display a list of columns in a table
	Notifications	Display the number of files (in the red circle) that are currently being exported and are ready to download

Icon	Name	Click to
	Refresh	Refresh data in a table or on a page
	Search	Search for users or roles
	Switch App	Move between GHX products (for example, between My Exchange Orders and Notifications)
	System Status	View the status of GHX products; the number in the red circle indicates the number of new or urgent messages
	Upload	Drag a Microsoft Excel file here to add multiple users in bulk

Multi-Factor Authentication

Multi-factor authentication (MFA) is an authentication method that requires more than one factor to successfully verify a user. Your organization can choose the authenticator of its choice as your authentication method. Users must have a device such as a smart phone or tablet to add MFA to their GHX user accounts.



Note: Setting up MFA is optional and dependent on your organization's internal policies and processes.

Set Up MFA for Your User Account

1. Click your **user name**. A list of options opens.
2. Select **Profile**. The *Profile* page opens.
3. Scroll down and click **Setup MFA**. The *Synchronize MFA Device* dialog box opens.

Synchronize MFA Device

Scan below QR code or enter the configuration key. After configuration, enter two consecutive authentication codes.



MFA Configuration Key
M7WU2JAKK354EN5GVLFU7WPLA5R 

First code *

Second code *

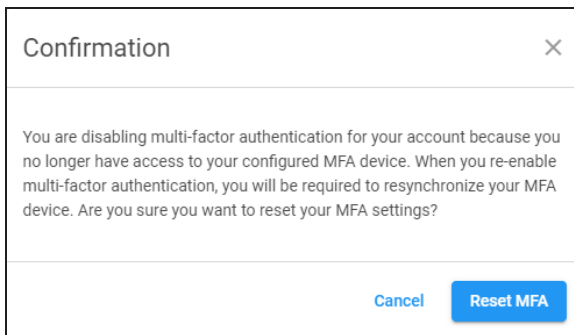
[Cancel](#) [Setup MFA](#)

4. Open the camera app on your device and hold it so that the QR code is in the view finder.
5. Follow your organization's authenticator directions.
6. Click **Setup MFA**.

Reset MFA for Your User Account

There may be times when you will need to reset the MFA (for example, when you upgrade to a new phone).

1. Click your **user name**. A list of options opens.
1. Select **Profile**. The *Profile* page opens.
2. Scroll down and click **Reset MFA**. A message displays.



A confirmation dialog box titled "Confirmation" with a close button (X) in the top right corner. The main text reads: "You are disabling multi-factor authentication for your account because you no longer have access to your configured MFA device. When you re-enable multi-factor authentication, you will be required to resynchronize your MFA device. Are you sure you want to reset your MFA settings?". At the bottom, there are two buttons: "Cancel" and "Reset MFA".

3. Click **Reset MFA**.

Reset MFA for Users - Administration

There may be times when users need to reset their MFA but they cannot do it themselves (for example, when they lose their device). A user with the Manage access level can reset the multi-factor authentication for other users.

1. Click the **Users** tab and search for the user account that needs to be reset.
2. Click the link in the **User** column. The *User Details* dialog box opens.
3. Click the reset action in the blue bar. User Management resets the MFA.
 - If MFA is required for the organization, users must set up their MFA device again the next time they log in
 - If MFA is optional for the organization, users can open their profile and set up their MFA device

Navigate User Management

When you log in to User Management, the *Users* page opens. A list of actions you can take and their results follows.

Action	Result
Click the Users Menu (your user name)	Opens a menu with the following options: Profile – Select to view profile information and edit display preferences Logout – Select to log out of the application
Click the Switch App  icon	Opens a menu of software solutions to which your organization subscribes
Click the System Status  icon	Opens a dialog box that displays the current status of GHX's software solutions
View the Notifications  icon	Displays information about files the system is currently exporting
Click Help and select Help link	Opens help topics for this software solution
Click Help and select Create Case Form	Opens a new tab where you can log on to the GHX Community and submit support tickets
Click for Stats	Loads user statistics organized by status and user role

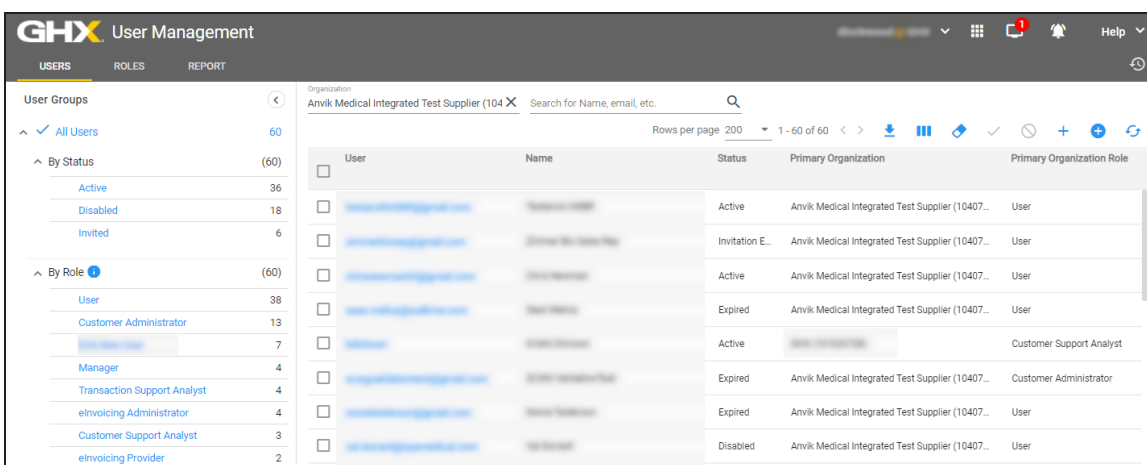


Users Page

Use the Users page to filter users by status or role in the left pane and search for users by organization, name, and email address in the right pane. You will see only those users who are within your organizational hierarchy.



Tip: To view a list of users who are under other facilities or divisions within your hierarchy, either click the Clear Filters  icon or click the X to remove the Organization filter. Then start typing an organization name and select an option from the list.



User	Name	Status	Primary Organization	Primary Organization Role
☐				
☐	John Doe	Active	Anvik Medical Integrated Test Supplier (10407...	User
☐	Jane Smith	Invitation E...	Anvik Medical Integrated Test Supplier (10407...	User
☐	John Doe	Active	Anvik Medical Integrated Test Supplier (10407...	User
☐	Jane Smith	Expired	Anvik Medical Integrated Test Supplier (10407...	User
☐	John Doe	Active	Anvik Medical Integrated Test Supplier (10407...	Customer Support Analyst
☐	Jane Smith	Expired	Anvik Medical Integrated Test Supplier (10407...	Customer Administrator
☐	John Doe	Expired	Anvik Medical Integrated Test Supplier (10407...	User
☐	Jane Smith	Disabled	Anvik Medical Integrated Test Supplier (10407...	User

Roles Page

The Roles page lists the custom roles that your organization has defined. See [Manage Custom Roles](#) for details.

Using User Management

The screenshot displays the GHX User Management interface. At the top, there's a header with the GHX logo and 'User Management' title. Below the header, there are tabs for 'USERS', 'ROLES', and 'REPORT'. The 'ROLES' tab is currently selected. The main content area shows a table of roles for the organization 'Anvik Medical Integrated Test Supplier (1040)'. The table has columns for Name, Description, Status, Security (Public/Private), Organization, and Internal Only. There are three roles listed: 'Anvik Roles - Supervisor' (Enabled, Private), 'User but no Supplier Intelligence' (Disabled, Private), and 'User with Vendormate Credentialing' (Enabled, Private). The interface also includes a search bar, a 'Rows per page' dropdown set to 50, and a '1 - 3 of 3' indicator.

☐	Name	Description	Status	Security (Public/Private)	Organization	Internal Only
☐	Anvik Roles - Supervisor	Anvik Roles - Supervisor	Enabled	Private	Anvik Medical Integrated Test Supplier	No
☐	User but no Supplier Intelligence	Standard user but without Supplier Intelligence	Disabled	Private	Anvik Medical Integrated Test Supplier	No
☐	User with Vendormate Credentialing	Add Vendormate Credentialing access to standard ...	Enabled	Private	Anvik Medical Integrated Test Supplier	No

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Search, Filter, and Sort Data

The following search, filter, and sort options are available in User Management.



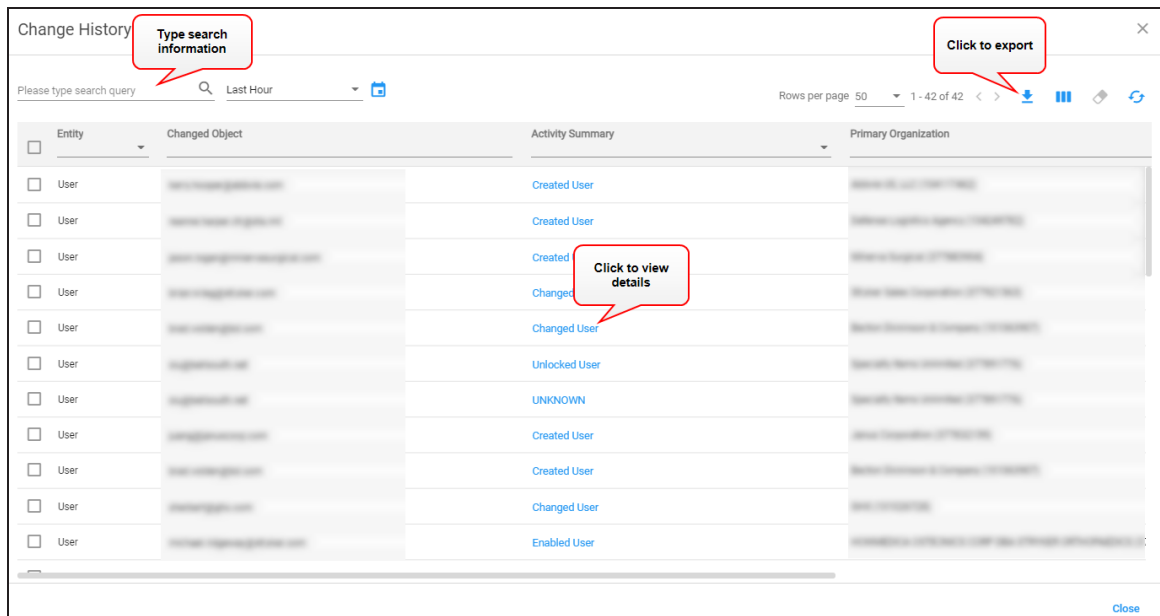
Tip: User Management uses wildcard search. This means that you can use the asterisk * wildcard character in certain fields to narrow your search results. For example, when you type *anvik*, results will include Anvik Medical, AnvikUser, and MgrAnvik.

Search Type	Description
Search fields	To search for an organization, email address, or name: - Type a whole or partial name or email address in the fields and press ENTER - Use an asterisk * wildcard for missing characters To clear the search criteria: - Click the X to the right of the Organization field - Click the Clear Filters  icon
Filter on the Users tab	- Click a link in the By Status or By Role lists in the left pane to display the filtered list in the right pane - Click All Users at the top of the left pane to clear the filters
Sort	- Click a column header one time to sort the information in ascending order - Click the same column header a second time to sort the information in descending order - Click the same column a third time to display the information in the original order

View and Export Change History

Change history allows you to view and export your organization's user account changes. Activity includes enabled, disabled, changed, and new users.

1. Click the Change History  icon. The *Change History* page opens.



2. Type search information in the search field and press ENTER (optional).
3. Select a time period from the list.

Options are:

- **Last Hour**
- **Last 24 Hours**
- **Last 7 Days**
- **Last 2 Weeks**
- **Last Month**
- **Last Quarter**
- **Last 6 Months**
- **Last Year**

4. Click the link in the **Activity Summary** column to view details about the changes (optional).
5. Click the  icon to export the data to an Excel spreadsheet (optional).

User Roles

There are three categories of user roles:

- [Domain roles](#) determine the user's default access levels
- [Access levels](#) determine the functionality that is available for each of the GHX products to which your organization subscribes
- [Custom roles](#) are organization-specific roles that are similar to domain roles; users with the Manage access level can set these up

Domain Roles

Domain roles are based on your organization's settings. These roles provide default levels of access to various products. Examples are User, Manager, and Customer Administrator. After assigning a domain role when setting up a new user or when editing an existing user account, a user with the Manage access level can adjust the default access levels if needed.

Access Levels

Each GHX product has access levels that are based on the specific product's requirements. For example, the User Management application has three levels: No Access, Read, and Manage.

Product roles are automatically assigned based on your organization's domain role. However, you can change those default access level values, when necessary (for example, when a particular user does not need access to a specific product).

Manage Custom Roles

Users with the Manage access level can add custom roles for their organization, when needed. For example, when you find yourself changing a standard product role every time you add a new user, you may want to create a custom role and apply the appropriate access levels for each GHX product. These custom roles are available in the **Role** list on the *User Details* dialog box when you add or edit users.



Note: Organization-defined custom roles will be visible only to users with User Management access under that same organization.

Add a Custom Role

1. Click the **Roles** tab. The *Roles* page opens.
2. Click the Add New  icon in the right pane. The *Role Details* dialog box opens.

Role Details

Name *

Organization *

GHX (101026728)

Description

Internal Only

Security

Yes

Private

Applies to

Application User

Default Product Access

Product	Access Level
ACI	No Access
CCXpert	No Access
Clinical ConneXion	No Access
Cloud ERP Integration	No Access
Common Data Platform	No Access
Compliance Document Manager	No Access
Contracting and Compliance solutions	No Access
Demand Insights	No Access

Cancel

Save

3. Type the role name and description.
4. Select an organization or facility, if needed.
5. Scroll down to the **Default Product Access** table and select the product access levels.



Note: This table contains a list of products to which your organization subscribes and their default access levels.



Tip: Redacted Access masks protected health information (PHI) and financial data on 850 and 820 transactions.

6. Click **Save**. This custom role is enabled and available in the **Role** list on the *User Details* dialog box.

Disable a Custom Role

Disabling a role removes it from the Roles list, but retains it in the application for future use.



Note: The application does not allow you to delete a user account. This is to comply with audit requirements. Instead, you can disable a user account.

1. Click the **Roles** tab. The *Roles* page opens.
2. Select the checkbox to the left of the role you want to disable.
3. Click the Disable  icon in the right pane.

Roles for Specific Products

The following table contains links to detailed information about various roles for some GHX products.

Product	Link to Product Help Topic
CCXpert	Understand User Roles
Data Connect	Manage Users
GHX Procure Requisition Manager	User Roles

Product	Link to Product Help Topic
Intelligent Business Rules (Orders)	User Role Permissions
My Exchange	User Roles for Suppliers User Roles for Buyers
NuVia	NuVia User Roles
Registration Center	Access Levels for Suppliers Access Levels for Buyers
Supply Chain Analytics	Access Levels for Suppliers Access Levels for Providers

User Statuses

The actions you can take on user accounts vary depending on the account's current status. For example, when a user account is in a Disabled status, the only available action you can take is to activate the user. The following table contains a list of user statuses.

Status	Description
Active	The user account was created (or migrated) and has an active password.
Disabled	The user can no longer access the application, even when typing an active password. To enable a disabled user: 1. Activate the user ID. 2. Ask the user to log in and click the Forgot Password link.
Expired	The user can no longer access the application. However, the user could log into the system if the user password was not expired. When logging in, the system will ask users to change their password. See "Reset a Forgotten Password" on page 25.
Invited	The user account was created or migrated but the user has not yet created a new password. This status automatically changes to Expired after 48 hours of inactivity. A user with the Manage access level can re-invite this user. To re-invite a user: 1. Click the Users tab and search for the user account. 2. Click the link in the User column. The <i>User details</i> dialog box opens. 3. Click the Actions button. 4. Select Send Password Reset. A confirmation message opens. 5. Click OK. The user will have another 48-hour time

Status	Description
	period in which to respond. See "Resend a Password Request" on page 26.
Invitation expired	The email invitation was sent, the user has not yet responded, and the invitation has expired. A user with the Manage access level can resend a password request or ask the user to walk through the reset a forgotten password process.

User Setup Process

The following steps outline the entire user setup process, from start to finish.

1. A user with the Manage access level adds a new user.
2. User Management populates the user name with the email address.
3. User Management sends an email invitation to the user's email address.
4. The user clicks the link provided in the email message.
5. The user sets up and saves his or her password.
6. The user logs in to <https://login.ghx.com> with the newly established login ID and password.

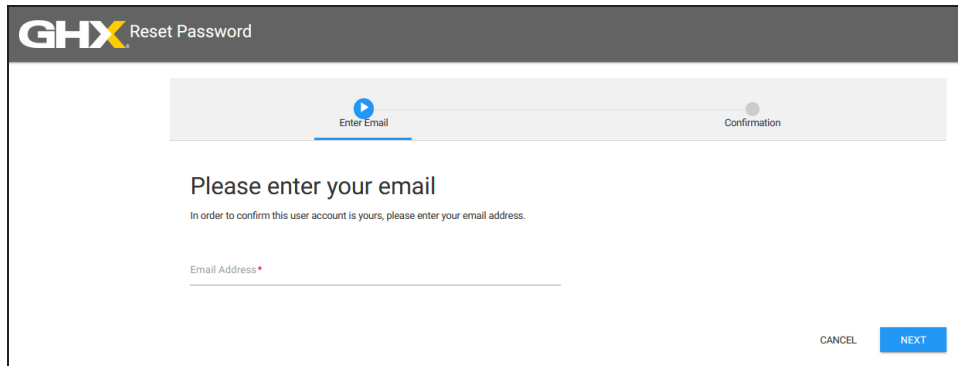
Reset a Forgotten Password

When users forget their password, they can reset it using the following steps.

1. Go to <https://login.ghx.com>. The *GHX Login* page opens.

The screenshot shows the GHX Login page. At the top, there is a yellow banner with the GHX logo and COVID-19 information. Below the banner is a white login box. Inside the box, there is a heading 'GHX Login' and a subheading 'Enter your GHX credentials to log in.' There are two input fields: 'User Name/Email Address' and 'Password'. Below the 'Password' field is a link that says 'Forgot Password?'. A red arrow points to this link. Below the link is a blue 'Login' button. At the bottom of the login box, there is a link for 'New Supplier Registration?' and some text about gaining access to Vendor Central. The footer of the page contains copyright information and links for Privacy Terms, Terms of Use, Privacy Policy, and Customer Care.

2. Click the **Forgot Password** link. A *Reset Password* page opens.



3. Type your email address and click **Next**. The *Check your email* page opens.
4. Open your email application and click the link in the password reset message. A *Setup your new password* page opens.
5. Type a new password in the **New Password** field.
6. Type the same password in the **Confirm Password** field.
7. Click **Save**. The *GHX Login* page opens and displays a success message.

Resend a Password Request

Users with the Manage access level can resend a password request to a specific user.

1. Click the **Users** tab. The *Users* page opens.
2. Search for the specific user.

3. Click the link in the **User** column. The *User Details* dialog box opens.

The **User Details** dialog box displays the following information:

- Login**: Username: test@anvik.com, Status: Active, Actions: [Dropdown]
- Profile**: First Name: Test, Last Name: Anvik, Email: test@anvik.com, Job Title, Work Phone, Mobile Phone, Time Zone: GMT-07:00 - Mountain (Denver, Edmonton, Chihuahua), Locale: English (United States)
- Access**: Primary, +, Primary Organization: Anvik Medical Integrated Test Supplier (104071130), Associated Organization(s), Role: User
- Product Access**: Table with columns Product and Access Level.

At the bottom right are **Cancel** and **Save** buttons. A red callout box points to the **Actions** dropdown with the text "Click to open list". Another red box highlights the **Disable User** and **Send Password Reset** options in the dropdown menu.

4. Click **Actions**. A list of actions opens.
5. Select **Send Password Reset**. A confirmation message opens.
6. Click **OK**. The user will have another 48-hour time period in which to respond.

Add New Users

Users with the Manage access level can add new users individually or in bulk. This topic contains instructions for adding individual users. See ["Add Multiple Users in Bulk"](#) on [page 32](#) for instructions for adding multiple user accounts using a Microsoft Excel template.

1. Click the **Users** tab. The *Users* page opens.
2. Click the Add New  icon in the right pane. The *User Details* dialog box opens.

User Details

^ Login

Username

☒ Send Invitation Email

^ Profile

First Name *

Last Name *

Email *

Job Title

Work Phone

Mobile Phone

Time Zone *

Locale *

GMT-07:00 - Mountain (Denver, Edmonton, Chihuahua)

English (United States)

^ Access

Primary

+

Primary Organization *

GHX (101026728)

Associated Organization(s)

Role *

Product Access

Cancel

Invite

3. Skip the **Username** field.



Note: You cannot edit this field. User Management will use the **Email** field value in the **Username** field.

4. Type the required information in the **Profile** area. Required fields are marked with an asterisk *.



Tip: Adding more information makes it easier to work in the applications.

Profile fields

Field	Description
First Name	Contains the user's first name.
Last Name	Contains the user's last name.
Email	Contains the user's email address. This is the user's single sign on user name.
Job Title	Contains the user's job title.
Work Phone	Contains a work phone number.
Mobile Phone	Contains a mobile phone number.  Tip: Some applications, like Notifications, use this value to send SMS text messages.
Time Zone	Contains a list of Greenwich Mean Time (GMT) time zones.
Locale	Identifies the user's preferred language.
Primary Organization	Identifies the organization to which this user is assigned. The user will see the activity for only this specific organization.
Associated Organization	Identifies additional organizations to which this user is assigned.

Field	Description
Role	Identifies the domain role. This value determines which individual products the user can access. Options include: • User • Customer Administrator • Manager • Custom roles specific to your organization See "Domain Roles" on page 19 for details.  Note: You may also see roles that begin with the letters EGX. Currently, GHX requires those for certain products, but you should not select these when adding a new user.

5. Scroll down and verify the products listed in the **Product Access** table.



Note: This table contains a list of products to which your organization subscribes. The values in the Access Level column are the default values for each product.

User Details

Product Access

Product	Access Level
ACI	Access
CCXpert	Read Only
Clinical ConneXion	Read Access
Cloud ERP Integration	No Access
Common Data Platform	No Access
Compliance Document Manager	Access
Contracting and Compliance solutions	Access
Demand Insights	No Access
EDI Specification Management	No Access
eInvoicing	No Access
File Uploads	User
File Validator	No Access
Fleet Management	No Access

Cancel

Invite

6. Modify the access levels for special cases (optional).



For example, a specific employee with the User domain access must also use Procurement Suite. However, your organization's default access level for the User role is No Access. In this case, you could select an available Procurement Suite option in the Access Level column list, such as Approver.



Tip: Redacted Access masks protected health information (PHI) and financial data on 850 and 820 transactions.

7. Click **Invite**. User Management sends an email message to the email address associated to that user profile. This message contains instructions and a link the user can click to create a password.

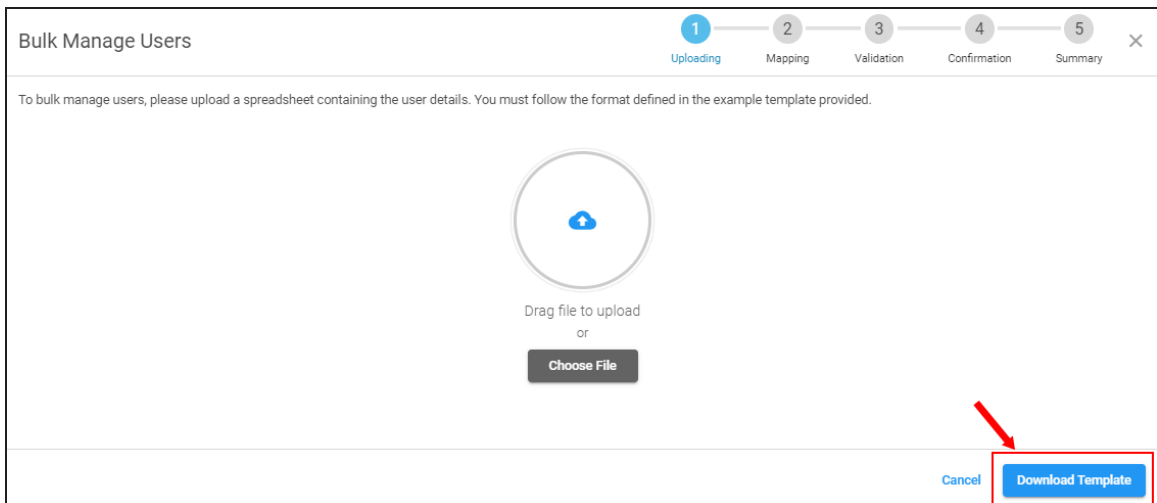


Tip: This email message will normally originate from the support@ghx.com mailbox. Therefore, your organization may want to add this address to your white list so these messages will not end up in a junk folder. If you are logging on to a lower environment (for example, integration), the email address will originate from the noreply@ghx.com mailbox.

Add Multiple Users in Bulk

Use the following steps to download a template to use when adding multiple user accounts at the same time.

1. Click the **Users** tab. The *Users* page opens.
2. Click the Bulk Manage Users  icon in the right pane. The *Bulk Manage Users* wizard opens.



3. Click **Download Template**.
4. Open the Excel spreadsheet.
5. Add the required information on the Users tab and save the spreadsheet. Required fields are marked with an asterisk * in the column header.

See ["Add New Users" on page 28](#) for profile field descriptions.



Tip: Adding more information makes it easier to work in the applications.



Note: When entering information into some fields, you may need to first scroll up to view all options.

6. Save the spreadsheet.
7. Return to the *Bulk Manage Users* wizard.
8. Drag the spreadsheet file onto the upload  icon. User Management validates the file.
9. Type the **Reason** (required) and **Case #** (optional) in the fields.
10. Click **Next**. User Management creates the user profiles with a status of Invited.



Tip: The status changes to Active when users create their passwords and successfully log in.

11. Click **Download Summary Details** to download an Excel report (optional). The number inside the red circle of the bell  icon notifies you when the job is complete and the file is ready to download.
12. Click **Finish Job** when you are finished (optional). User Management removes the download notification and closes the wizard.

Manage User Accounts

Users with the Manage access level can [search for](#), [edit](#), [enable](#), and [disable](#) user accounts.

Search for User Accounts

1. Click the **Users** tab. The *Users* page opens.
2. Type a search term in the **Organization** or **Search** fields above the table in the right pane.



Tip: Use the asterisk * wildcard character to narrow your search results.

3. Click the  icon or press ENTER. The list of users displays.

The screenshot shows the GHX User Management interface. The 'USERS' tab is selected. A search bar at the top right contains the text 'Anvik Medical Integrated Test Supplier (104 X)' and a search icon. Below the search bar, a table displays a list of users. The table has columns for 'User', 'Name', 'Status', 'Primary Organization', and 'Primary Organi:'. The table shows 10 rows of user data, including names like 'Anvik Medical Integrated Test Supplier (10407...)' and 'Anvik Medical Integrated Test Supplier (10407...)', with statuses like 'Active', 'Invitation Expired', 'Expired', and 'Disabled'.

User	Name	Status	Primary Organization	Primary Organi:
	Anvik Medical Integrated Test Supplier (10407...)	Active	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Invitation Expired	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Active	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Expired	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Active	Anvik Medical Integrated Test Supplier (10407...)	Customer Supc
	Anvik Medical Integrated Test Supplier (10407...)	Expired	Anvik Medical Integrated Test Supplier (10407...)	Customer Adm
	Anvik Medical Integrated Test Supplier (10407...)	Expired	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Disabled	Anvik Medical Integrated Test Supplier (10407...)	User
	Anvik Medical Integrated Test Supplier (10407...)	Disabled	Anvik Medical Integrated Test Supplier (10407...)	User

4. Do the following to clear the search criteria:
 - Click the X to the right of the *Organization* field, or
 - Click the Clear Filters  icon to clear the *Search* field

Edit User Accounts

1. Click the **Users** tab. The *Users* page opens.
2. Search for a specific user.
3. Click the link in the **User** column. The *User Details* dialog box opens.

User Details

^ Login

Username

Status

Expired

Actions

^ Profile

First Name *

DebTesting

Last Name *

Email *

Job Title

Work Phone

Mobile Phone

Time Zone *

GMT-07:00 - Mountain (Denver, Edmonton, Chihuahua)

Locale *

English (United States)

^ Access

Primary

+

Primary Organization *

Anvik Medical Integrated Test Supplier (104071130)

Associated Organization(s)

Role *

User

Product Access

Product	Access Level

Cancel

Save

4. Modify the information, as needed.



Note: You cannot edit the **Username** field.

5. Scroll down to the **Product Access** area and click the  icon in the **Access Level** column for the product you need to modify.



Tip: Redacted Access masks protected health information (PHI) and financial data on 850 and 820 transactions.

6. Select an option and click **Save**.

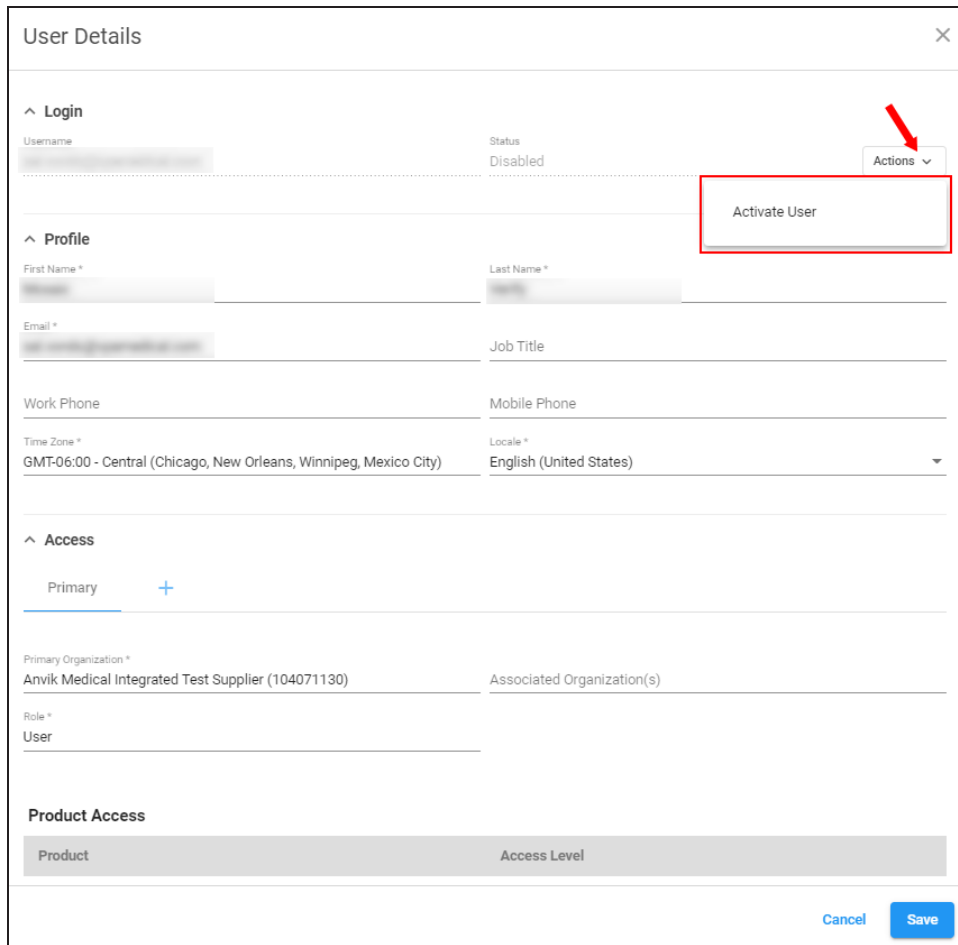
Activate User Accounts

Users with the Manage access level can activate (enable) disabled user accounts.

1. Click the **Users** tab. The *Users* page opens.
2. Click the **Click for Stats** link in the left pane. User data displays.
3. Click the **Disabled** link in the *By Status* list in the left pane.
4. Click a link in the **User** column. The *User Details* dialog box opens.



Tip: Alternatively, you can select the checkbox to the left of one or more users and click the Enable Users  icon.



The screenshot shows the 'User Details' form. The 'Login' section displays 'Username' and 'Status: Disabled'. An 'Actions' dropdown menu is open, showing 'Activate User' as an option. The 'Profile' section includes fields for 'First Name', 'Last Name', 'Email', 'Job Title', 'Work Phone', 'Mobile Phone', 'Time Zone', and 'Locale'. The 'Access' section shows 'Primary' as the selected organization and 'User' as the role. The 'Product Access' table is empty. At the bottom right are 'Cancel' and 'Save' buttons.

5. Click **Actions**. A list of actions opens.



Note: The options vary based on the user's current status.

6. Select **Activate User**.
7. Click **Save**.

Disable User Accounts

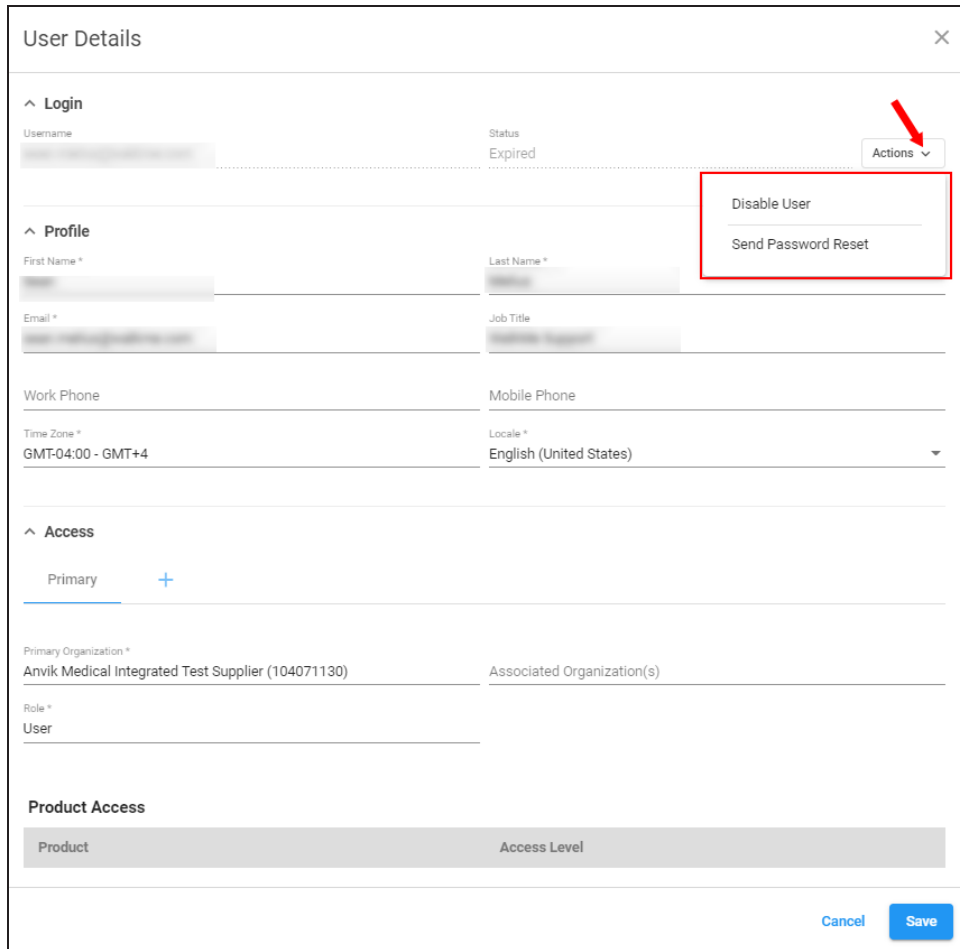
Disabling a user prevents that user from logging into any GHX application.

1. Click the **Users** tab. The *Users* page opens.
2. Click the **Click for Stats** link in the left pane.
3. Click the **Active** link in the *By Status* list in the left pane.

- Click a link in the **User** column. The *User Details* dialog box opens.



Tip: Alternatively, you can select the checkbox to the left of one or multiple users and click the Disable Users  icon.



User Details

^ Login

Username: [redacted] Status: Expired

^ Profile

First Name *: [redacted] Last Name *: [redacted]

Email *: [redacted] Job Title: [redacted]

Work Phone: [redacted] Mobile Phone: [redacted]

Time Zone *: GMT-04:00 - GMT+4 Locale *: English (United States)

^ Access

Primary +

Primary Organization *: Anvik Medical Integrated Test Supplier (104071130) Associated Organization(s): [redacted]

Role *: User

Product Access

Product	Access Level
[redacted]	[redacted]

Cancel Save

- Click **Actions**. A list of actions opens.



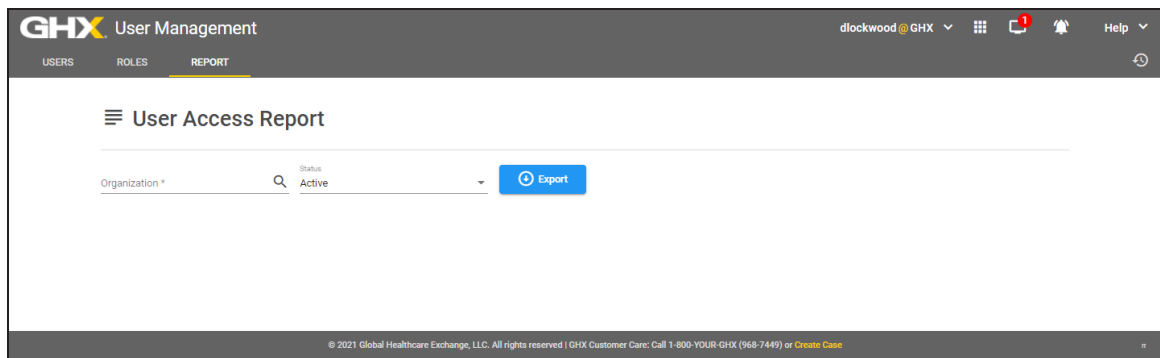
Note: The options vary based on the user's current status.

- Select **Disable User**.
- Click **Save**.

Run the User Access Report

The User Access Report contains user account details including the user's name, organization, email address, and date and time when the user last logged in.

1. Click **Report**. The *User Access Report* page opens.



2. Search for and select the organization.
3. Select a user status.

Options are:

- **Active**
- **Disabled**
- **Invited**
- **All**

4. Click **Export**. User Management exports the data to an Excel file.

Troubleshooting

I set up a new user, but the user did not receive the email message.

Try these steps:

1. Check the user's junk mail folder.
2. Check the user's email box rules and filters. A rule or filter could be sending messages to a specific folder (for example, to a GHX folder).
3. Log on to User Management and resend the password email message.
See ["Resend a Password Request" on page 26](#).
4. Add the support@ghx.com email address to your organization's white list. This is the address GHX uses to send user messages.



Tip: If you are logging on to a lower environment (for example, integration), the email address will originate from the noreply@ghx.com mailbox.

5. Ask your IT team to check the security settings for your organization's email.
6. Log on to User Management, select the checkbox to the left of the user, and click the Enable Users  icon.

Users cannot remember their passwords.

Ask the user to follow these steps: ["Reset a Forgotten Password" on page 25](#).

A user's profile has an Expired status.

An Expired status indicates that the user did not finish setting up a user password within 48 hours of when the user profile was created.

Ask the user to follow these steps: ["Reset a Forgotten Password" on page 25](#).

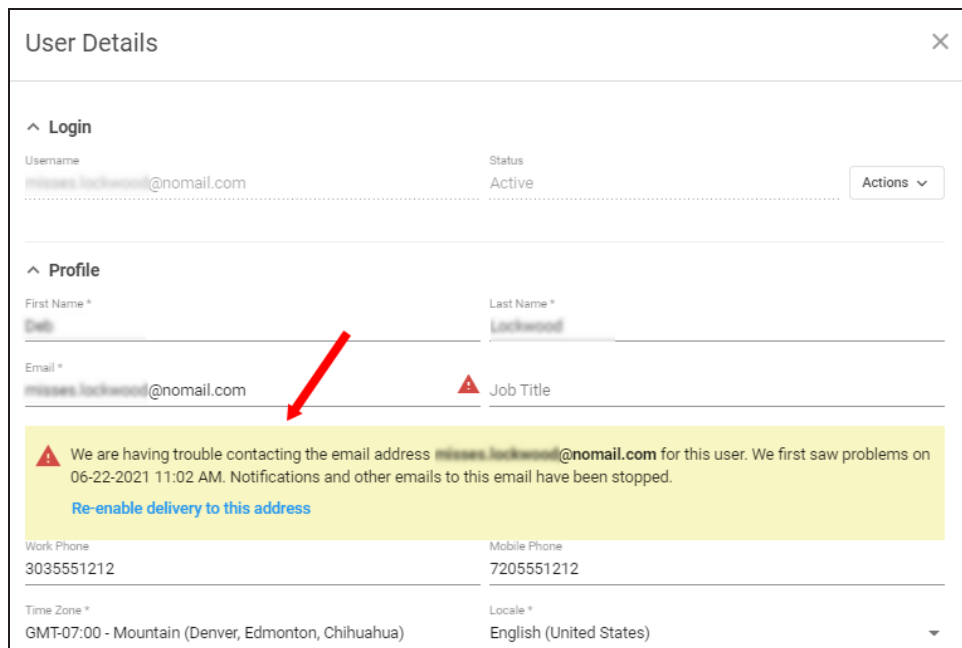
One of my users has tried to log in multiple times and is now locked out.

A user gets up to five opportunities to log in. After each failed attempt, the user receives a system message. After trying five times, the user is locked out. At this point a user with the Manage access level needs to take the following actions:

1. Click the **Users** tab. The *Users* page opens.
2. Search for the specific user.
3. Click the link in the **User** column. The *User Details* dialog box opens.
4. Click **Actions**. A list of actions opens.
5. Select **Send Password Reset**. A confirmation message opens.
6. Click **OK**. The user will have another 48-hour time period in which to respond.

Where can I see information about bounced email addresses?

Return (bounce) information related to a user's email address is shown on the **User Details** dialog box. You can click the link in the message to re-enable the address, if needed.



The screenshot shows the 'User Details' dialog box for a user named 'misses.lockwood@nomail.com'. The user's status is 'Active'. Under the 'Profile' section, the email address is listed with a red warning icon. A yellow banner at the bottom of the profile section contains a message: 'We are having trouble contacting the email address misses.lockwood@nomail.com for this user. We first saw problems on 06-22-2021 11:02 AM. Notifications and other emails to this email have been stopped.' Below this message is a blue link that says 'Re-enable delivery to this address'. A red arrow points to this link. The dialog box also shows fields for First Name, Last Name, Job Title, Work Phone, Mobile Phone, Time Zone, and Locale.

User Details	
^ Login	
Username misses.lockwood@nomail.com	Status Active
^ Profile	
First Name * Deb	Last Name * Lockwood
Email * misses.lockwood@nomail.com	Job Title
⚠ We are having trouble contacting the email address misses.lockwood@nomail.com for this user. We first saw problems on 06-22-2021 11:02 AM. Notifications and other emails to this email have been stopped. Re-enable delivery to this address	
Work Phone 3035551212	Mobile Phone 7205551212
Time Zone * GMT-07:00 - Mountain (Denver, Edmonton, Chihuahua)	Locale * English (United States)

Related Help

Click the following links to open help systems for related products:

- [CCXpert](#)
- [GHX Procure Registration Manager](#)
- [Intelligent Business Rules \(Orders\)](#)
- [My Exchange for buyers](#)
- [My Exchange for suppliers](#)
- [Notifications](#)
- [NuVia](#)
- [Registration Center for buyers](#)
- [Registration Center for suppliers](#)
- [WebDirect](#)

Videos

Click [here](#) to see a portfolio of all of the videos, or click the individual links in the table below:

Title	Description	Duration
Adding and Editing Users in User Management	Walk through how to add, edit, and manage users in GHX's User Management.	4:59
Managing Roles in User Management	Watch how you can create unique custom roles (with unique access levels) outside GHX's User Management default roles.	3:05

Glossary of Terms

The following acronyms and terms are used throughout these help topics.

Term	Definition
Buyers	Entities that create and manage purchase orders for GHX's supplier, provider, and distributor community, which verify that the correct items are delivered at the correct time for the correct price.
Exchange, the	The GHX system that facilitates the flow of electronic transactions between trading partners.
IDN	Integrated Delivery Network Identifies a group of hospitals or providers with a common owner. In User Management, identifies the top facility level.
MFA	Multi-factor authentication
My Exchange	The dashboard and user interface of GHX's core software application (the Exchange).
PHI	Protected health information
Redacted access	An access level setting that masks protected health information (PHI) and financial data on 850 and 820 transactions.
Suppliers	Organizations that provide goods and services to buyers.
Trading partners	Supplier and buyer (provider) organizations that have established a business agreement.