

VST Hospital Administrator Guide

Version 2.3.0



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Getting Started

The Vocera Secure Texting solution (VST) extends the power of the Vocera Communications System to physicians and care teams that are located outside the hospital. VST balances security and convenience by providing a secure, easy to use, HIPAA-compliance enabling alternative to SMS as well as basic voice capabilities to enhance communication and collaboration. The solution integrates seamlessly with the Vocera platform, providing texting and voice capabilities across all Vocera end points including iOS, Android, and all popular browsers.

The Vocera Secure Texting solution provides the following features:

- HIPAA-compliant text messaging
 - Fully auditable communication trail
 - Directory of hospital-provided contacts
 - Ability to call or text Vocera associates inside the hospital without revealing your phone number
- [About the VST Solution](#) on page 7
 - [Site Readiness](#) on page 9
 - [About the VST Administration Console](#) on page 12

About the VST Solution

VST connects the clinical staff within a hospital with the clinical staff of affiliated providers, creating a single contact list that is authorized and managed by those hospitals and providers.

VST allows designated care team members within a hospital to communicate with each other, as well as with the care team of affiliated providers who may not be employed by that hospital. The hospital determines which of its clinical staff members these providers can communicate with.

If you are a clinical staff member in an affiliated provider, one or more of the hospitals you work with has invited your organization to communicate through VST. Your own organization determines which of its clinical staff members hospital employees and other affiliates can communicate with.

About Security and Privacy

VST provides an easy to use HIPAA-compliant alternative to SMS messaging, so you are able to discuss personal health information without worrying about its security. In addition, your phone number is used internally by VST, but it is never disclosed to any user.

When you use the VST app to call another user, Vocera requires your mobile phone number to request a call that a third-party service dials on your behalf. The user receiving the call *does not* see your mobile number; instead, the recipient sees only the system-generated Voice number of your VST organization.

Other users may view your own user profile, but it does not display your mobile number. Your visible user profile includes your office and fax numbers, as well as a Vocera number field that displays "Private Number".



Important: The Handheld Client supports the speech-to-text dictation capabilities provided by your device's keyboard to permit greater accessibility for people who have a disability. Because Apple and Android send the audio to cloud services outside our secure texting applications, make sure you use this feature as prescribed by your organization's HIPAA guidelines.

Vocera Solution Comparison

Vocera smartphone and badge solutions offer secure messaging capability to any health care professional. Regardless of role or location, you can use Vocera to send secure, HIPAA-compliant messages to any member of your care team.

The following table lists the attributes and capabilities of the Vocera badge, Vocera Secure Texting and Vocera Collaboration Suite. Use this table to determine what solution is the best choice for you.

Attribute	Vocera Badge	Vocera Secure Texting		Vocera Collaboration Suite	
Network Supported	Wi-Fi	Cellular	Wi-Fi	Cellular	Wi-Fi
Supports Shared Devices	✓			✓	✓
Hands Free	✓				
Voice Automated	✓			✓	✓
Contact by Name, Role, Group	✓	✓	✓	✓	✓
Receive Group Call and Broadcast	✓				✓
Initiate Group Call and Broadcast	✓			✓	✓
Push-to-Talk	✓				✓
Contacts Directory Search		✓	✓	✓	✓
Favorites List		✓	✓	✓	✓
Presence/Availability Information		✓	✓	✓	✓
Select-to-Connect Commands		✓	✓	✓	✓
Keypad for extension dialing				✓	✓
Simple Paging	✓			✓	✓
Alarms/Alerts through integration	✓			✓	✓
Secure transmission and delivery of messages		✓	✓	✓	✓
Text Users and Groups		✓	✓	✓	✓
Web Console Messaging		✓	✓	✓	✓

The Vocera messaging solutions enable you to:

- Reach the **right person, instantly**.
- At the **right time**.
- On the **right device**.
- With the **right information**.
- In the **right place, anywhere**.

Site Readiness

Before you deploy the Vocera Secure Texting application, make sure your IT environment is set up to support the requirements you'll need.

Vocera Software Requirements

This section describes the specific hardware and software required for the Vocera Secure Texting Handheld Clients. In addition, if you are a Hospital Administrator, this section describes the Vocera Voice Server, Vocera Messaging Platform, and telephony requirements.

Vocera Voice Server Requirements

If you are a hospital administrator, the Vocera Secure Texting solution requires you to have one of the versions of the Vocera Voice Server described in this topic. If you are a practice administrator, your organization has received an invitation from a hospital, and you do not need a Vocera Voice Server.

As a hospital administrator, you need one of the following versions of the Vocera Voice Server installed in your on-premises environment:

- Vocera Voice Server version 4.4.3, 4.4.4, 5.0.1, 5.1.0, or 5.2.0 or greater on any supported operating system

You may also need to install the VST Sync Connector on your Vocera Voice Server, depending upon the specific components in your on-premises Vocera environment.

If your on-premises environment contains:	Install this VST Sync Connector on your VS machine:
Both: <ul style="list-style-type: none">• VS 5.2.0 or greater• VMP 5.2.0 or greater	<ul style="list-style-type: none">• No VST Sync Connector necessary
Both: <ul style="list-style-type: none">• VS 5.1.0 or earlier• VMP 5.2.0 or greater	<ul style="list-style-type: none">• Install VSTSetup-VS-VMP.exe
Only: <ul style="list-style-type: none">• VS 5.2.0 or greater	<ul style="list-style-type: none">• Install VSTSetup-VS-Only.exe
Only: <ul style="list-style-type: none">• VS 5.1.0 or earlier	<ul style="list-style-type: none">• Install VSTSetup-VS-Only.exe

If you need to install either **VSTSetup-VS-VMP.exe** or **VSTSetup-VS-Only.exe**, prepare your Vocera Voice Server environment as follows:

- Install Microsoft .Net Framework 4.7.1 on the Vocera Voice Server machine

The installer for both **VSTSetup-VS-VMP.exe** and **VSTSetup-VS-Only.exe** requires .Net Framework 4.7.1; it is not compatible with earlier versions of the .Net Framework. To verify that the 4.7.1 .Net Framework is installed, see the Microsoft article [How to: Determine which .NET Framework versions are installed](#).

Contact [Vocera Support](#) to download version 3.0.0 of the VST Sync Connector, which is packaged as a small executable to install on the Vocera Voice Server.

Vocera Messaging Platform Requirements

The Vocera Secure Texting solution optionally integrates with Vocera Messaging Platform 5.2.0 or greater.

The VST-VMP integration also requires the minimum versions of the Vocera Collaboration Suite, Vocera Voice Server, and telephony described elsewhere in [Vocera Software Requirements](#) on page 9.

Telephony Requirements

Vocera Secure Texting requires you to integrate the Vocera Voice Server with the Vocera SIP Telephony Gateway to allow the VST Handheld Client users to call badge users.

Vocera Client Requirements

Vocera client apps have been tested on the operating systems and hardware described in this topic.



Important: The latest version of the Vocera Secure Texting platform provides capabilities that are incompatible with the 2.0.x handheld client apps. The 2.0.x apps have unpredictable behavior when connected to the current VST platform, and they are no longer supported. Make sure all users are working with the VST Version 2.3.0 client or greater.

Table 1: Vocera Client Requirements

Client	Requirements
VST iOS Client	<ul style="list-style-type: none"> VST iOS client version 2.3.0 client or greater iOS 9.x or greater Apple iPhone 5 or greater
VST Android Client	<ul style="list-style-type: none"> VST Android client version 2.3.0 or greater Android OS 4.4 or greater
Vocera Collaboration Suite	<p>For interoperability between the VST and VCS clients:</p> <ul style="list-style-type: none"> Vocera Collaboration Suite 3.1 or greater (Also requires Vocera Messaging Platform 5.2.0 or greater)

Supported Web Browsers

You can use most major web browsers to work with the VST Administration Console and the VST Web Client.

Vocera has tested VST Administration Console and the VST Web Client with the following web browsers:

- Microsoft Internet Explorer 10 and 11
- Google Chrome (latest version)
- Mozilla Firefox (latest version)

Other browsers may also work, but have not been tested.

Network Requirements

The Vocera Secure Texting application requires one-time configuration of your enterprise firewall to allow specific types of network traffic.

Ask your IT Administrator to open the following ports on the enterprise firewall:

Table 2: Port requirements for VST iOS clients

Description	Protocol	Port Number	Direction	Destination Host
Vocera on-premises system => Vocera cloud	TCP	443	Outbound	<code>wss://sync-texting.vocera.com/ws/SyncService</code> or the following IP addresses: <ul style="list-style-type: none"> 52.4.96.202 52.5.210.78 52.6.65.17 52.6.205.238 52.7.230.54 54.88.243.57
VST iOS Client => APNS (Apple Push Notification Service)	TCP	443 5223	Outbound	gateway.push.apple.com

Table 3: Port requirements for VST Android clients

Description	Protocol	Port Number	Direction	Destination Host
Vocera on-premises system => Vocera cloud	TCP	443	Outbound	<code>wss://sync-texting.vocera.com/ws/SyncService</code> or the following IP addresses: <ul style="list-style-type: none"> 52.4.96.202 52.5.210.78 52.6.65.17 52.6.205.238 52.7.230.54 54.88.243.57
VST Android Client => GCM (Google Cloud Messaging)	TCP	5228 5229 5230	Outbound	android.googleapis.com

VST User Scalability

The VST sync mechanism supports up to 5000 users, and the VST client supports up to 10,000 users. If you have affiliated organizations, the total number of users (your organization plus its affiliates) supported by the client may still not exceed 10,000.

For example:

- The VST solution can support 9,999 native VST users and 1 synced user
- The VST solution can support 5000 native VST users and 5000 synced users
- The VST solution does not support 5001 synced users in a single organization

About the VST Administration Console

The VST Administration Console allows you to administrate the capabilities of your organization and manage users from most web browsers.

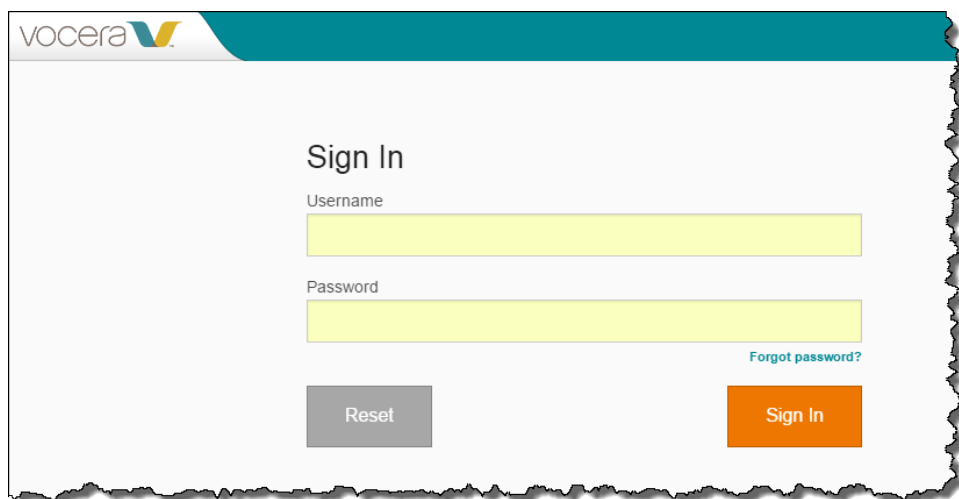
How to Log Into the VST Administration Console

You need to enter your email address and password each time you log into the VST Administration Console.

To log into the VST Administration Console:

1. Open a web browser and navigate to <https://vst-admin.vocera.com/>.

The VST Administration Console Sign In page appears. Bookmark this page in your browser so you can find it quickly in the future.

The screenshot shows the 'Sign In' page of the VST Administration Console. At the top left is the 'vocera' logo. The page has a teal header bar. The main content area is white and contains the title 'Sign In'. Below the title are two input fields: 'Username' and 'Password', both with yellow backgrounds. To the right of the 'Password' field is a blue link that says 'Forgot password?'. At the bottom left is a grey 'Reset' button, and at the bottom right is an orange 'Sign In' button. The entire screenshot is framed with a torn paper effect.

2. Enter your email address in the Username field.
3. Enter your password in the Password field.
4. Click Sign in to log in.

The VST Administration Console opens and displays the Update Organization page for the organization that you administer.

The screenshot shows the 'Update Organization' page in the VST Administration Console. At the top, there is a header with the Vocera logo and navigation links for 'Admin', 'Help', and 'Sign Out'. Below the header, the organization name 'ABELARD MEDICAL CENTER' is displayed. The main section is titled 'Update Organization' and contains 'Organization Details'. The details include:

- Group name Required:** A text field containing 'Abelard Medical Center'.
- Office number Required:** A text field containing '(408) 882-5830'.
- Voice number:** A text field containing '(408) 837-0043'.
- Members allowed to send messages to whole organization:** A dropdown menu currently set to 'No'.
- Message Expiration Time:** A dropdown menu currently set to '2 Weeks'.

 At the bottom right of the form, there are two buttons: a grey 'Cancel' button and an orange 'Save' button.

A First Look

The first time you log into the VST Administration Console, you see the *Update Organization* page for the organization that you administer. This page is your starting point for all the tasks you need to perform.

A menu bar along the top of the page provides access to the following features:

- **Admin**
Allows you to administer your organization and manage users.
- **Help**
Provides access to the *VST Hospital Administrator Guide*
- **Sign Out**
Logs you out of the application

How to Log Out of the VST Administration Console

Make sure you log out of the VST Administration Console whenever you are not using it. As an additional security mechanism, the application will log you out automatically after 20 minutes of inactivity.

To log out of the VST Administration Console:

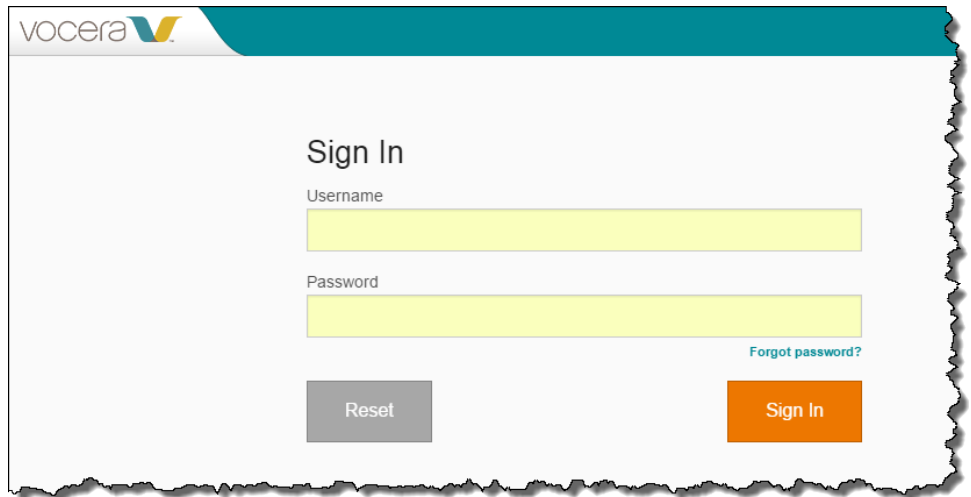
1. From any page in the VST Administration Console, click **Sign Out** from the menu at the top. The VST Administration Console logs you out and displays the *Login* page.

How to Reset the Administrator Password

If you are a VST Hospital or Practice administrator and have forgotten your password, you may reset it without contacting Vocera for assistance.

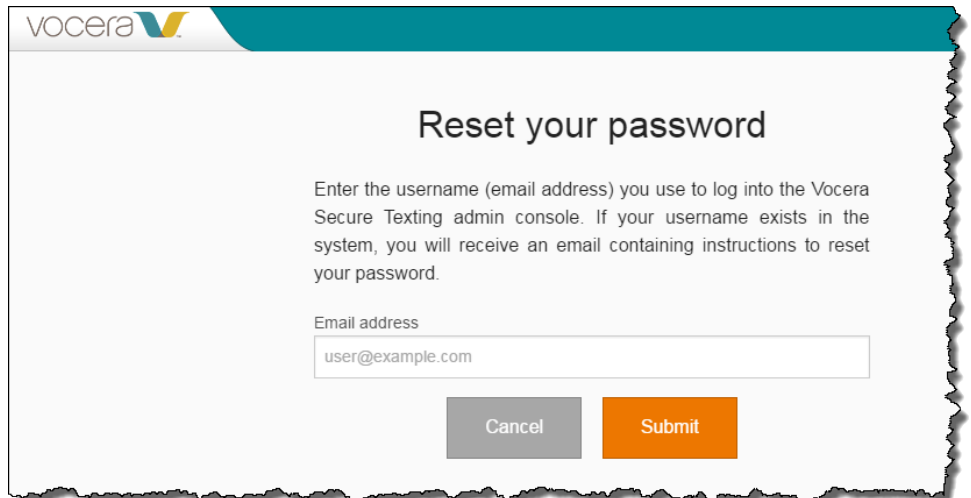
To reset your password for the VST Administration Console:

1. Open a web browser and navigate to <https://vst-admin.vocera.com/>. The VST Administration Console **Sign In** page appears.



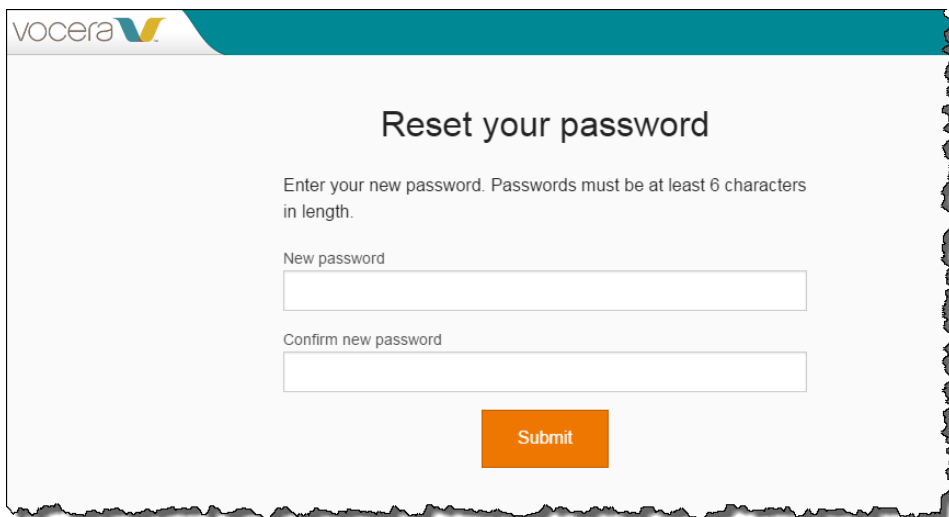
The screenshot shows the Vocera Sign In page. At the top left is the Vocera logo. The page has a teal header bar. The main content area is white and contains the following elements: a 'Sign In' heading, a 'Username' label above a yellow input field, a 'Password' label above another yellow input field, a 'Forgot password?' link in blue text to the right of the password field, a grey 'Reset' button, and an orange 'Sign In' button.

2. Click the [Forgot password?](#) link.
The [Reset your password](#) page appears.



The screenshot shows the Vocera 'Reset your password' page. It features the Vocera logo and a teal header bar. The main content area is white and includes: a 'Reset your password' heading, a paragraph of instructions: 'Enter the username (email address) you use to log into the Vocera Secure Texting admin console. If your username exists in the system, you will receive an email containing instructions to reset your password.', an 'Email address' label above a white input field containing 'user@example.com', and two buttons at the bottom: a grey 'Cancel' button and an orange 'Submit' button.

3. Enter your email address in the [Email address](#) field and click [Submit](#).
The VST system sends an email message with instructions for resetting the password to the specified address.
4. Click the link in the email message.
The [Reset your password](#) page appears again and displays fields that allow you to change your password.



Reset your password

Enter your new password. Passwords must be at least 6 characters in length.

New password

Confirm new password

Submit

5. Use the fields on the **Reset your password** page to enter your new password and confirm it, and then click **Submit**.

The **Sign In** page appears and displays a message indicating that your password has been changed. In addition, the VST system sends you a confirmation email.

Deploying New VST Integrations

- [About the On-Premises Integration](#) on page 17
- [Integrating VST with VMP 5.2.0 and VS 5.2.0](#) on page 18
- [Integrating VST with VMP 5.2.0 and Pre-5.2.0 VS](#) on page 30
- [Integrating VST with VS Only \(no VMP\)](#) on page 46



About the On-Premises Integration

VST integrates with the on-premises Vocera Voice Server solution to supplement the VS voice communication and workflow features with text messaging capabilities. If your Vocera Voice Server is already integrated with the Vocera Messaging Platform, the VST integration extends the reach of your VMP messaging capabilities to include employees of your affiliated organizations.

At the end of the on-premises and cloud platform integration:

- Your on-premises badge and VCS users will appear properly in the VST [Directory](#), allowing VST users to send messages to them. VST users in your own organization and also your affiliated hospitals and practices appear in the VST [Directory](#) as well.
- Both your internal VST users and also the users of your affiliated hospitals and practices appear properly in the [Contacts](#) list of the VCS app, if you have the VMP integration. Badge users and your organization's VCS users continue to appear in the VCS [Contacts](#) list as well.
- The messaging and voice capabilities of your on-premises solution are integrated with the VST messaging and basic voice capabilities of the cloud platform.

Integrating VST with VMP 5.2.0 and VS 5.2.0

When the VMP 5.2.0 and VS 5.2.0 systems in your on-premises environment are fully integrated, follow the steps in this section to integrate them with the Vocera Secure Texting cloud platform. Make sure your Vocera Voice Server and Vocera Messaging Platform solutions are integrated and communicating properly before you begin.

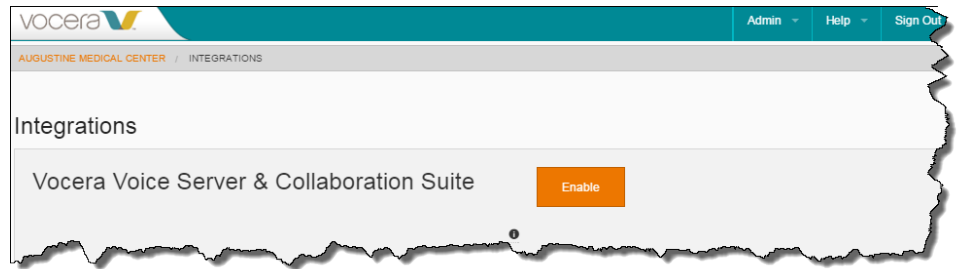
How to Generate an Integration Key

Generate an Integration User ID and a Shared Key in the Vocera Secure Texting Administration Console. Together, these values act as credentials that allow the on-premises solution to log into the Vocera Secure Texting cloud application.

1. Log into the Vocera Secure Texting Administration Console.
The Update Organization page for your organization appears.

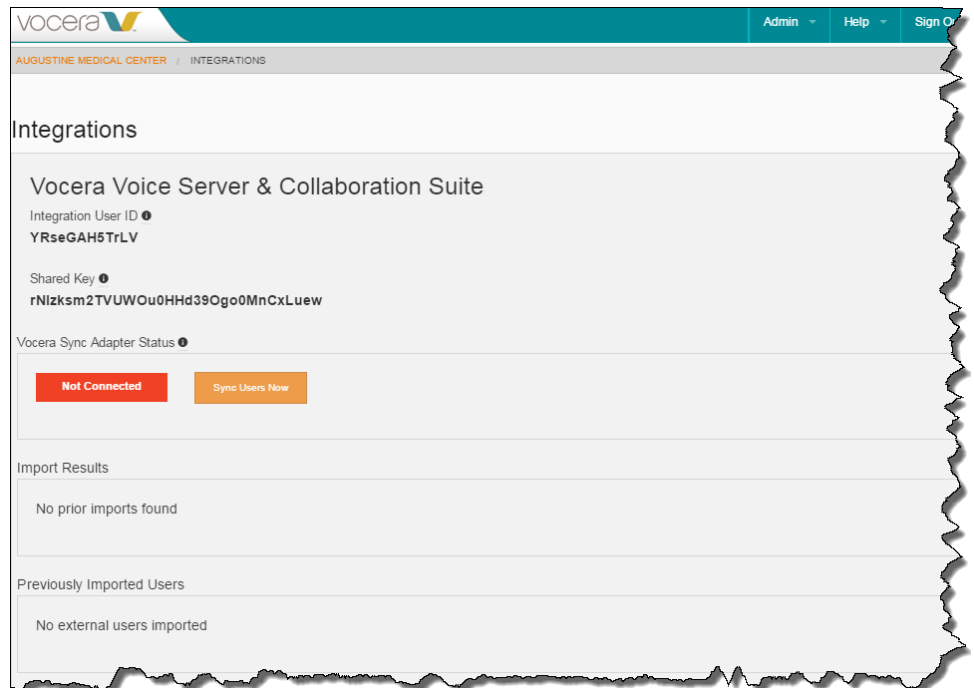
The screenshot shows the 'Update Organization' page in the Vocera Secure Texting Administration Console. The page has a teal header with the Vocera logo and navigation links for 'Augustine Medical Center', 'Admin', and 'Tools'. Below the header, the breadcrumb 'SYSTEM ADMIN / AUGUSTINE MEDICAL CENTER' is visible. The main content area is titled 'Update Organization' and contains 'Organization Details' and 'Secure Message Options' sections. The 'Organization Details' section includes fields for Group ID (413), Group name (Augustine Medical Center), Office number ((408) 882-5830), Voice number ((408) 550-7227), and Default time zone (US/Pacific). The 'Secure Message Options' section includes checkboxes for 'Members can send messages to whole organization' and 'Allow messages to non-users via email and SMS', both set to 'Yes'. It also includes dropdown menus for 'Message Expiration Time' (7 Days) and 'High Priority Notification Sound Length' (30 Seconds). At the bottom right, there are 'Cancel' and 'Save' buttons.

2. Choose Admin > Integrations.
The Integrations page appears.



3. Click Enable.

The Integrations page refreshes and the Integration User ID and Shared Key values appear.



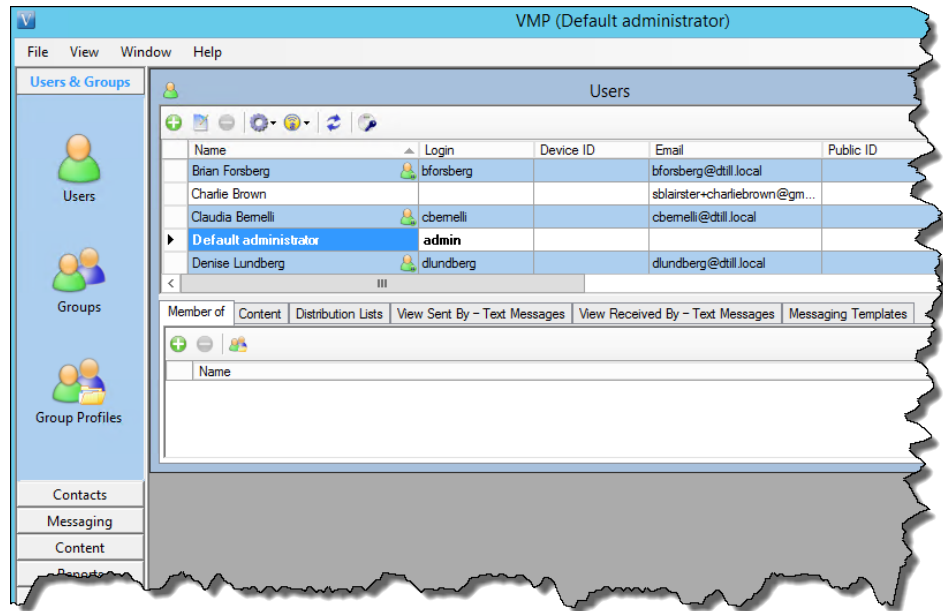
Make a note of these values; you need to enter them when you install the Vocera Secure Texting Sync Connector.

How to Connect the On-Premises Solution to VST

When your on-premises solution includes VMP 5.2.0, you must enable the cloud integration through the VMP Administrator and provide it with credentials that allows it to connect to the VST server.

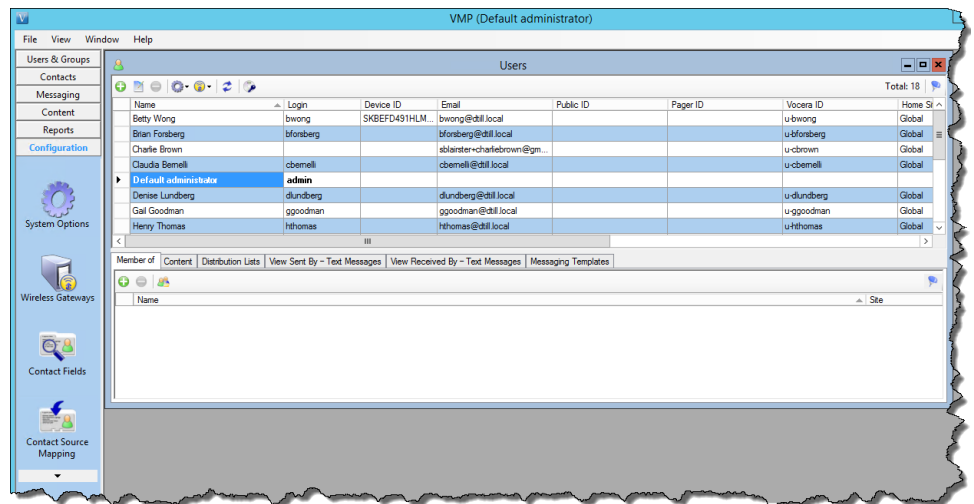
To supply VST credentials in the Vocera Messaging Platform

1. Launch the VMP Administrator and log in as described in the *Vocera Messaging Platform Administration Guide*.



The VMP Administrator displays the Users & Groups module.

- Click Configuration in the sidebar menu on the left.



A list of Configuration module views appears in the sidebar menu.

- Click System Options in the sidebar menu.

System Options	
System and Networking	
Networking	
Vocera Messaging Server Public Host Name / IP	10.37.107.159
Vocera Messaging Server Internal Host Name / IP	10.37.107.159
Email	
Enable Outgoing Email	No
Display Name	
Email Address	
SMTP Server	
SMTP Port	25
SMTP Authentication	No
Security	
Device Validation Certificate	Add
Enforce SSL for Smartphone connections	No
Enforce App PIN	SHARED
App PIN Timeout (in seconds)	300
Enforce device password for all smartphones	No
Minimum Password Length	5
Description	
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	

The System Options dialog box appears.

4. Scroll to display the Vocera Secure Texting App - Message Exchange section of the dialog box.

Field	Value
Enabled	Yes
Integrations	Vocera Voice
IP Addresses	10.37.107.152
Port	80
Use HTTPS	No
VCG IP Addresses	
VMI Message Expiry (in minutes)	5
Enable Enhanced Voice Server NIO Tomcat Feature	No
Vocera Secure Texting App - Message Exchange	Enabled
User ID	
Shared Key	
Email	
Enable Secure Message Initiation	No
Secure Message Initiation - Incoming Mail	
Protocol	POP3

Description

OK Cancel Help

5. Enable the VST - VMP integration as follows and click OK:

Field	Description
Enabled	Set Enabled to Yes.
User ID	Enter the Integration User ID from the Vocera Secure Texting Administration Console.
Shared Key	Enter the Shared Key from the Vocera Secure Texting Administration Console.

The System Options dialog box closes.

Populating the VST Directory with On-Premises Users

When your on-premises environment meets the VST prerequisites for the Vocera Voice Server—either through the use of VS 5.2.0 or through the installation of the Vocera Secure Texting Sync Connector on earlier versions of VS—the system automatically creates the VSTContacts and VSTUsers groups in the Global site of the Vocera Voice Server. These groups provide additional communication and internal system capabilities.

- Members of the VSTContacts group appear in the Directory list of the VST Handheld Client and the VST Web Client.

You manually maintain the membership of the `VSTContacts` group. Populate this group with on-premises users who need to be available to VST users. VST app users who are members of your organization or one of its affiliates can then communicate with these on-premises users by calling and sending them text messages.

Make sure both your badge and VCS users are set up as Vocera Voice Server users before you populate `VSTContacts`. The membership of `VSTContacts` controls the display of all on-premises users in the VST clients.

- The Vocera Secure Texting Sync Connector automatically maintains the membership of the `VSTUsers` group.

This group is used only for internal system purposes. The Vocera Secure Texting Sync Connector automatically populates the membership of this group with the name of the VST organization the Vocera Voice Server is connected to, as well as the names of any practices associated with the VST organization.

The Vocera Voice Server treats each group member as a user, creating a profile for it, and entering the organization's auto-generated `Voice Number` from the Vocera Secure Texting Administration Console into the profile. The Vocera Voice Server dials the phone number when badge users place calls to the organization by name in a voice command. Also, if a badge user receives a call from a VST user, the name of the calling organization flashes on the user's badge.

When the database of the Vocera Voice Server contains data (that is, during an upgrade), the `VSTContacts` and `VSTUsers` groups are created immediately. When the database of the VS is empty (that is, during a new installation), the `VSTContacts` and `VSTUsers` groups are created as soon as you create a user or a group in the Vocera Voice Server.



Note: In the Vocera Voice Server Administration Console, set the `VSTContacts` group to `Permission Only` to minimize impact to speech recognition. See the *Vocera Voice Server Administration Console Guide* for information on setting the `Permission Only` property.

How to Set Up On-Premises Users as VST Contacts

Specify the badge and VCS users who will appear as contacts in the VST Handheld Client and VST Web Client. VST users will be able to text and call these on-premises users.

When you install the Vocera Secure Texting Sync Connector, the groups `VSTContacts` and `VSTUsers` are automatically created on the Vocera Voice Server. You need to add Vocera Voice Server users to the `VSTContacts` group to make them show up as contacts in the VST app.

1. Log into the Vocera Voice Server Administration Console.
2. Select `Groups` in the sidebar menu on the left.
The `Add, Edit, and Delete Groups` page appears.
3. Select the `VSTContacts` group and choose `Edit Group`.
The `Edit Group` dialog box appears.
4. Select the `Member` tab.
The `Add, Delete, and Re-Order Group Members` page of the `Edit Group` dialog box appears.
5. Click `Add Name`.
The `Select User or Group` dialog box appears.
6. Select the users and groups you want to add as members of `VSTContacts` and click `Finish`.
The users and groups appear in the `Edit Group` dialog box.
7. Click `Save`.
The `Edit Group` dialog box closes, and the Vocera Voice Server updates the membership of `VSTContacts`.

The next time the Vocera Secure Texting Sync Connector runs, it syncs the users in the `VSTContacts` group with the hosted VST database.

See [How to View Integration Details](#) on page 24 for information about confirming the sync operation.

How to View Integration Details

After you have integrated your on-premises solution with VST, you can review the list of users who have been imported to VST and also the results of each import. You may want to use this information if it is necessary to troubleshoot the integration.

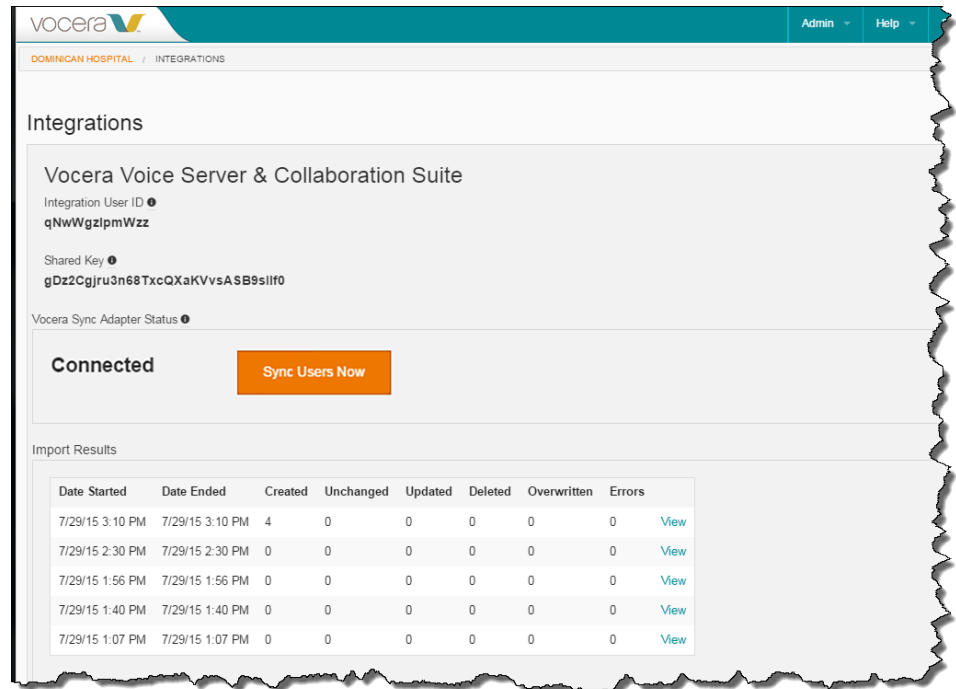
1. Log into the Vocera Secure Texting Administration Console.

The Update Organization page for your organization appears.

The screenshot displays the 'Update Organization' page in the Vocera Secure Texting Administration Console. The page is titled 'Update Organization' and is part of the 'SYSTEM ADMIN / AUGUSTINE MEDICAL CENTER' section. It contains several input fields and dropdown menus for updating organization details. The 'Group ID' is set to 413. The 'Group name' is 'Augustine Medical Center'. The 'Office number' is '(408) 882-5830' and the 'Voice number' is '(408) 550-7227'. The 'Default time zone' is 'US/Pacific'. Under the 'Secure Message Options' section, there are four dropdown menus: 'Members can send messages to whole organization' (Yes), 'Allow messages to non-users via email and SMS' (Yes), 'Message Expiration Time' (7 Days), and 'High Priority Notification Sound Length' (30 Seconds). At the bottom right, there are 'Cancel' and 'Save' buttons.

2. Select Admin > Integrations from the menu at the top right of any page.

The Integrations page appears.



3. Review the **Vocera Sync Adapter Status** section to confirm that the status is set to "Connected".
4. Review the **Import Results** section to see details about each successive import from the on-premises system. The most recent import operation appears at the top of the list. Optionally click [View](#) to display the **Import User Process** page and review the type of update that occurred for each imported user.

Integrations Page Reference

View details about the sync adapter status for a specific organization.

Table 4: Vocera Voice Server & Collaboration Suite

Field	Description
Integration User ID	The Integration User ID is similar to a user name used to log into a web site. The Vocera Sync Adapter uses this ID when connecting to the VST server. Copy this ID and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Shared Key	The Shared Key is similar to a password, although the raw value is never used on its own. Copy this value and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Vocera Sync Adapter Status	Displays either Connected or Not Connected to indicate whether the VST cloud server is connected to your on-premises system. The status is checked and updated every 10 seconds.
Sync Users Now	Click to sync Vocera Secure Texting Sync Connector and Vocera Voice Server users immediately. This operation is not usually necessary; the sync occurs automatically every 90 minutes.

Table 5: Import Results

Field	Description
Date Started	The date and time the import user operation began. The most recent operation appears first.
Date Ended	The date and time the import user operation ended. The most recent operation appears first.
Created	The number of new users created by import from the Vocera Voice Server.

Field	Description
Unchanged	The number of user profiles that did not change after the import from the Vocera Voice Server.
Updated	The number of user profiles changed as a result of the import from the Vocera Voice Server.
Deleted	The number of user profiles deleted as a result of the import from the Vocera Voice Server.
Overwritten	The number of user profiles overwritten as a result of the import from the Vocera Voice Server.
Errors	The number of errors that occurred as a result of the import from the Vocera Voice Server.
View	Click to display the User Import Report page, containing details of the import for each user.

Import User Process Page Reference

Table 6: Imported Users

Field	Description
Change Type	Displays one of the values CREATED, UPDATED, DELETED, or NONE to indicate the type of change that occurred.
Staff ID	An internal unique identifier for each user, generated by the Vocera Secure Texting system.
External ID	A unique identifier for each user, generated by the on-premises system.
Name	The first and last name of each user.
Message	Displays messages from the server about the import operation, if any exist.

Imported User Page Reference

Table 7: Imported User

Field	Description
StaffID	The internal staff ID number for this user, which is automatically generated and cannot be changed.
First Name	The first name (given name) of the user. This field is required, and can be edited by an administrator only.
Middle Name	The user's middle name.
Last Name	The last name (family name) of the user. This field is required, and can be edited by an administrator only.
Badge Phone Number	Displays the value of the Guest Access Number concatenated with the value of the user's Desk Phone or Extension. These values are imported from the Vocera Voice Server.
External ID	A unique identifier for each user, generated by the on-premises system.

Populating the VCS Contacts List with VST Users

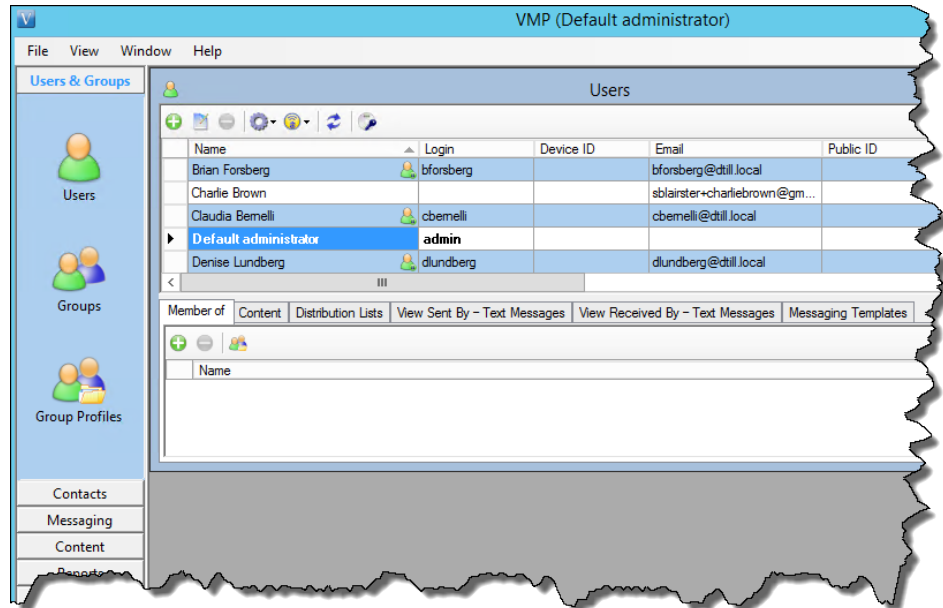
After your VST cloud environment is correctly integrated with the on-premises environment, all VST users in your own organization and any affiliated organizations are synced to the VMP automatically at 90-minute intervals. These users automatically become members in the VST Users distribution list; specify the access permissions on this DL to control which VMP users are able to view the VST users as contacts.

How to Set Up VST Users as VCS Contacts

The users in your own VST organization and its affiliates appear as members of the VST Users distribution list in VMP. Specify access control permissions on this DL to allow the VST users to appear as contacts in the VCS Handheld Client. VCS users will be able to send text messages to these users.

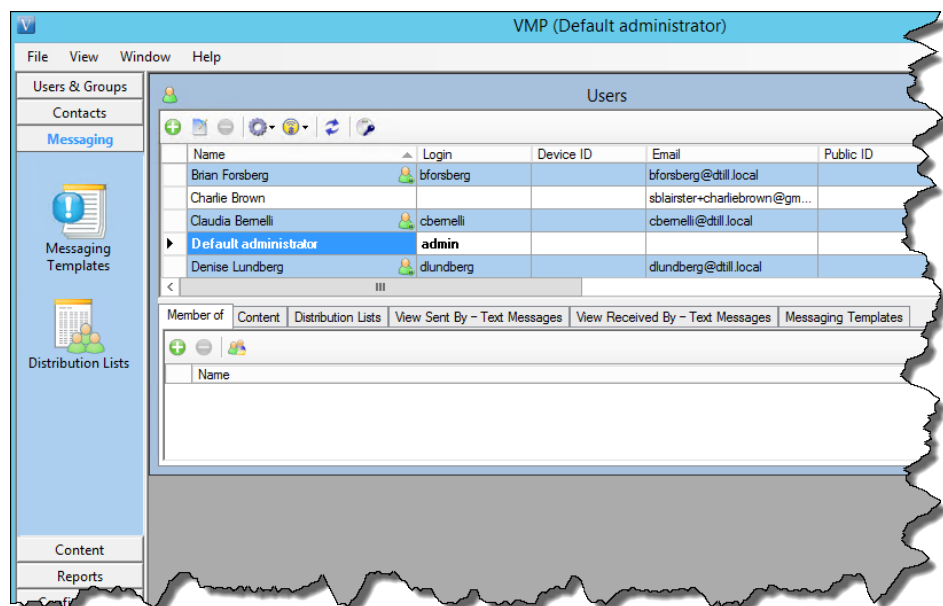
Provide VCS users access to the VST Users distribution list to make the VST users show up as contacts in the VCS application.

1. Launch the VMP Administrator and log in as described in the *Vocera Messaging Platform Administration Guide*.



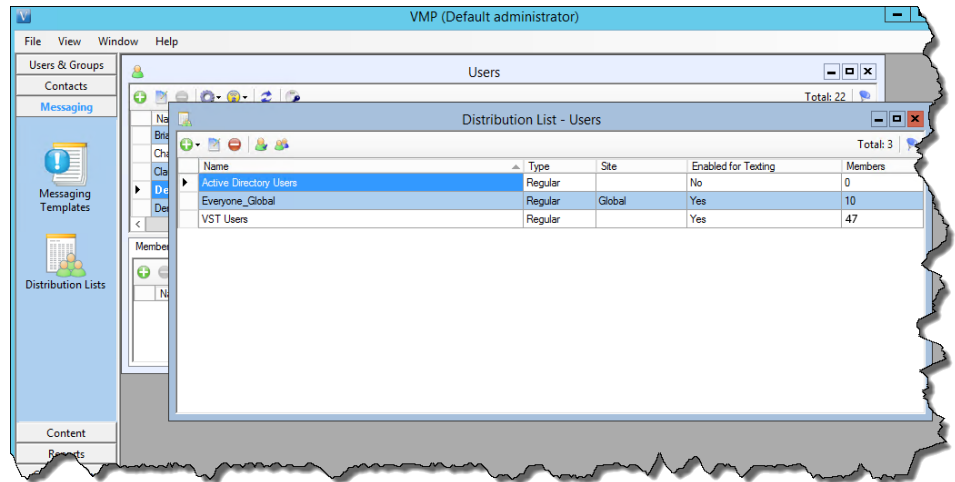
The VMP Administrator displays the Users & Groups module.

2. Click Messaging in the sidebar menu on the left.



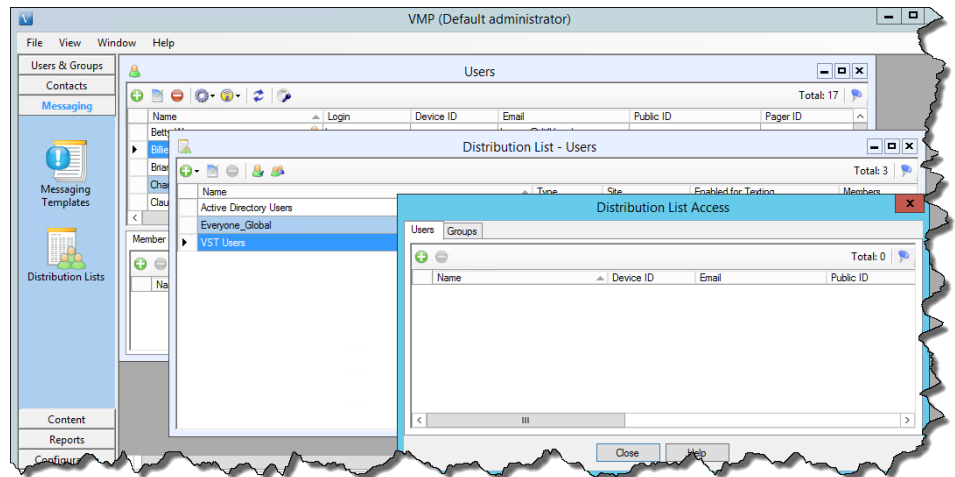
A list of Messaging module views appears in the sidebar menu.

3. Click Distribution Lists in the sidebar menu.



The Distribution Lists - Users window appears.

4. Select the VST Users distribution list exists and click the Manage Access icon.

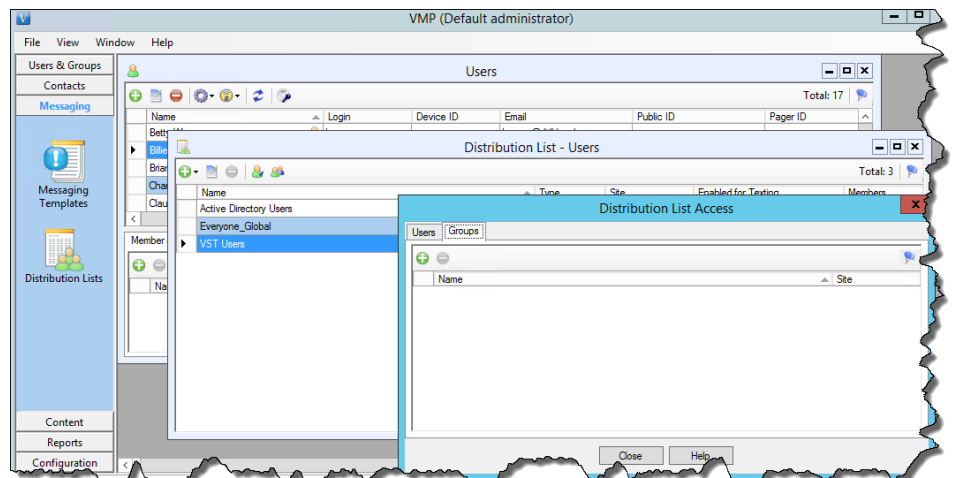


The Distribution List Access window appears.

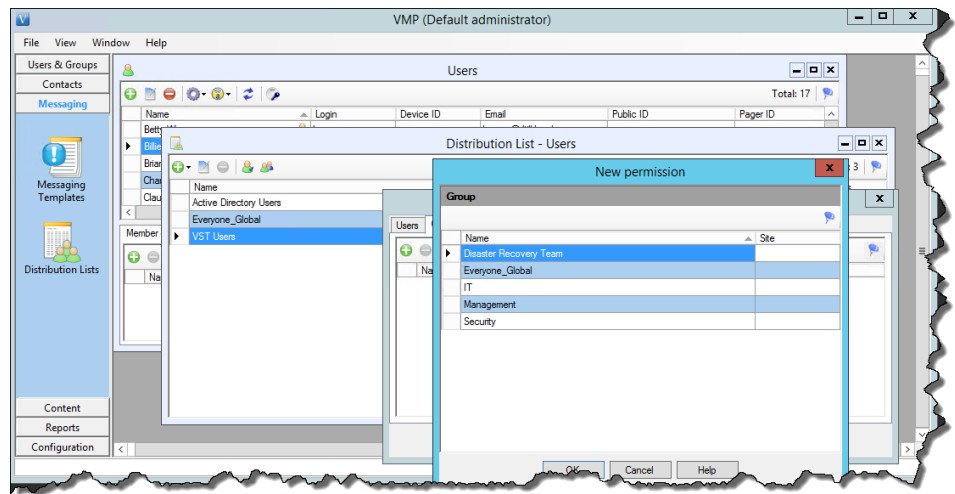


Note: The remaining steps in this procedure show you how to grant all VMP users the ability to see VST users as contacts. You can control access to this distribution list more finely as described in the *Vocera Messaging Platform Administration Guide*.

5. Click the Groups tab to grant access to this DL at the group level.

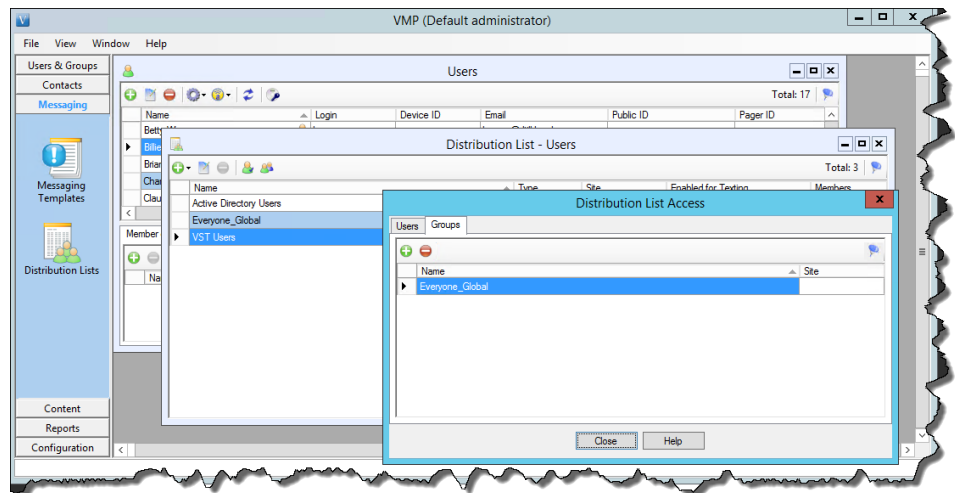


6. Click the Add icon.



The New Permission window appears.

7. Select Everyone_Global and click OK.



The Everyone_Global group Distribution List Access window appears.

The members of the VST Users distribution list appear as Contacts in the handheld client of all VCS users.

Integrating VST with VMP 5.2.0 and Pre-5.2.0 VS

When the VMP 5.2.0 and VS 5.1.0 or earlier version in your on-premises environment are fully integrated, follow the steps in this section to integrate them with the Vocera Secure Texting cloud platform. Make sure your Vocera Voice Server and Vocera Messaging Platform solutions are integrated and communicating properly before you begin.

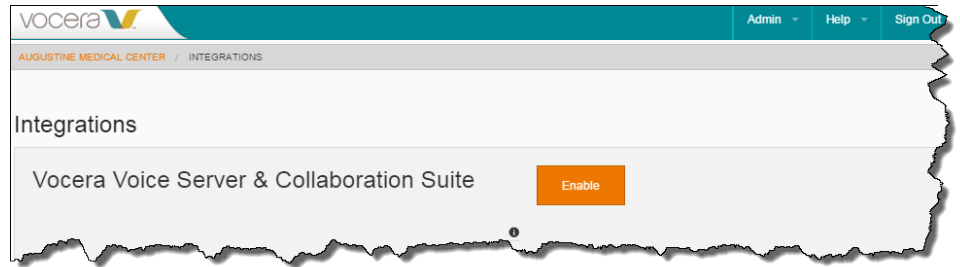
How to Generate an Integration Key

Generate an Integration User ID and a Shared Key in the Vocera Secure Texting Administration Console. Together, these values act as credentials that allow the on-premises solution to log into the Vocera Secure Texting cloud application.

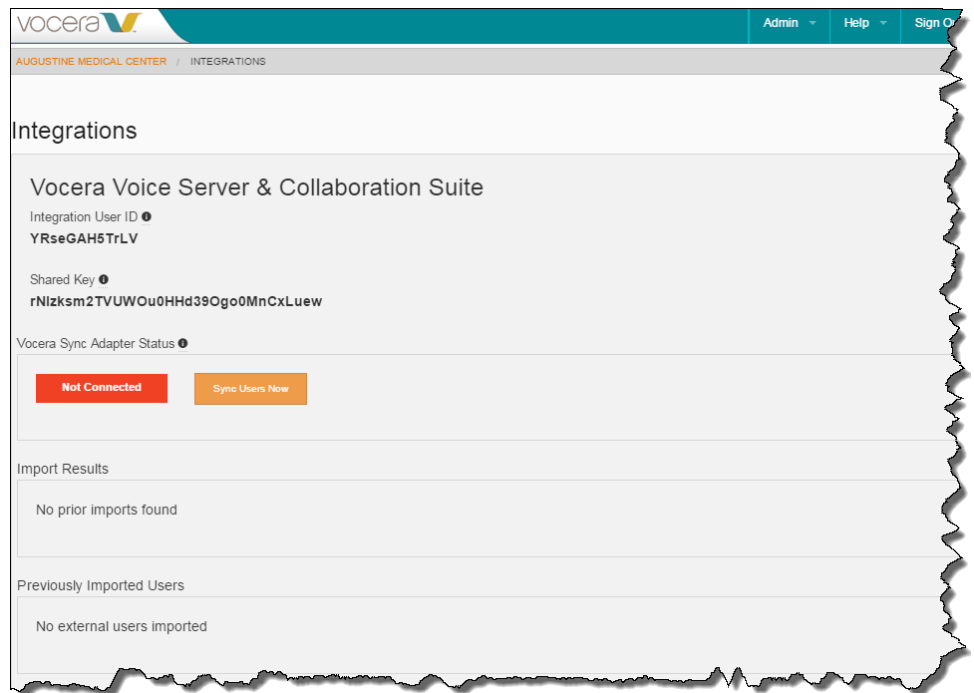
1. Log into the Vocera Secure Texting Administration Console.
The Update Organization page for your organization appears.

The screenshot shows the 'Update Organization' page in the Vocera Secure Texting Administration Console. The page has a teal header with the Vocera logo and navigation links for 'Augustine Medical Center', 'Admin', and 'Tools'. Below the header, the breadcrumb 'SYSTEM ADMIN / AUGUSTINE MEDICAL CENTER' is visible. The main heading is 'Update Organization', followed by the subheading 'Organization Details'. The form contains several fields: 'Group ID' (413), 'Group name Required' (Augustine Medical Center), 'Office number Required' ((408) 882-5830), 'Voice number' ((408) 550-7227), and 'Default time zone' (US/Pacific). Below these is a section titled 'Secure Message Options' with two rows of settings: 'Members can send messages to whole organization' (Yes) and 'Allow messages to non-users via email and SMS' (Yes), both with dropdown menus. To the right of these are 'Message Expiration Time' (7 Days) and 'High Priority Notification Sound Length' (30 Seconds), also with dropdown menus. At the bottom right are 'Cancel' and 'Save' buttons.

2. Choose Admin > Integrations.
The Integrations page appears.



3. Click Enable.
The Integrations page refreshes and the Integration User ID and Shared Key values appear.



Make a note of these values; you need to enter them when you install the Vocera Secure Texting Sync Connector.

Installing the Vocera Secure Texting Sync Connector

If you have a version of Vocera Voice Server earlier than 5.2.0 or if you do not have a Vocera Messaging Platform server in your on-premises environment, you must install the VST Sync Connector. on your Vocera Voice Server machine or cluster.

How to Install the VST Sync Connector on a Non-Clustered VS

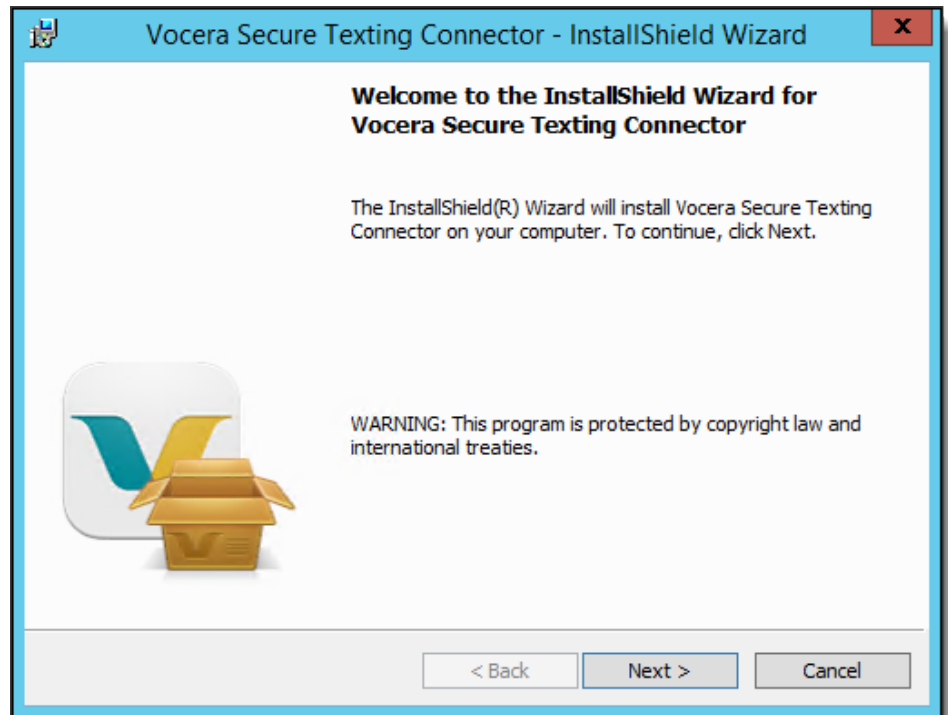
Use the steps in this topic to install the Vocera Secure Texting Sync Connector software on a stand-alone (non-clustered) Vocera Voice Server.

The Vocera Secure Texting Sync Connector installer requires Windows .Net Framework version 4.7.1. It will not install in environments with earlier versions of the .Net Framework. If necessary, download the .Net Framework from Microsoft and install it before you begin. Make sure you do not also install IIS, which will interfere with Apache on the Vocera Voice Server machine.

To install the Vocera Secure Texting Sync Connector:

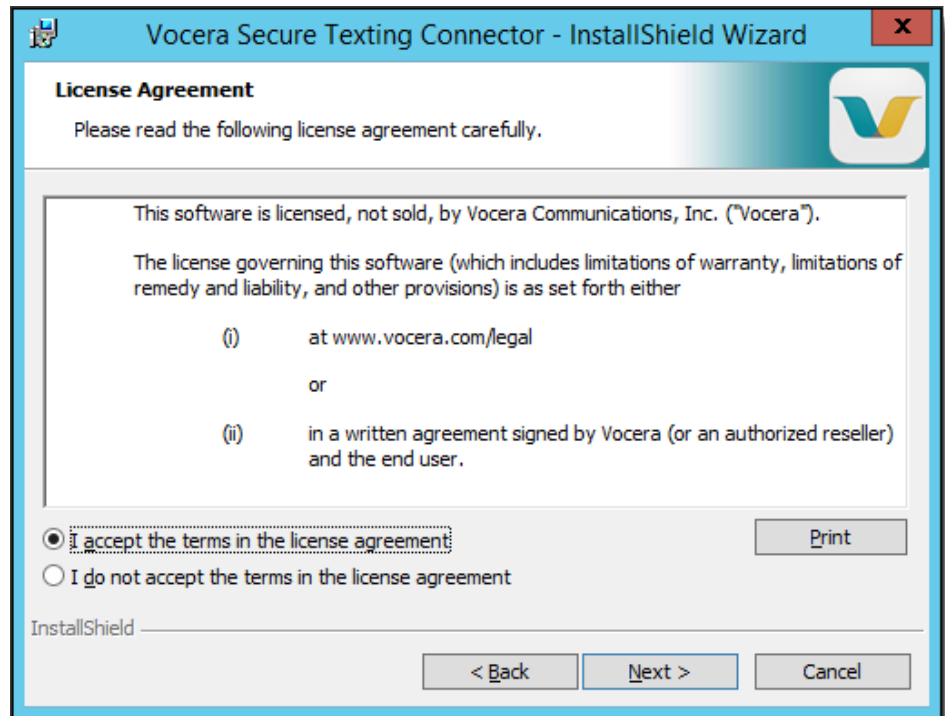
1. Log into the Vocera Voice Server computer with administrator privileges.

2. Download the Vocera Secure Texting Sync Connector installer to the desktop.
 - If your on-premises solution has both the Vocera Voice Server and the Vocera Messaging Platform, download the **VSTSetup-VS-VMP.exe** file.
 - If your on-premises solution has only the Vocera Voice Server, download the **VSTSetup-VS-Only.exe** file.
3. Double-click the installer to start the installation.
The Welcome dialog box appears.
4. Click **Next** in the Welcome dialog box.



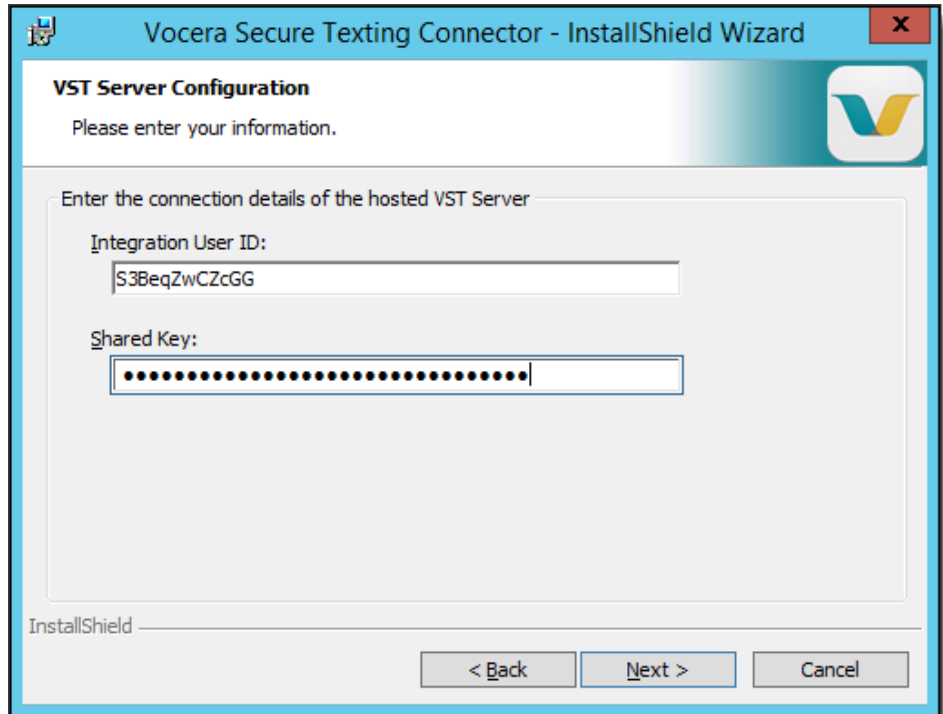
The License Agreement dialog box appears.

5. In the License Agreement dialog box, select **I accept the terms in the license agreement** and click **Next**.



- If you have a VS-VMP the Ready to Install the Program dialog box appears. Continue with Step 7.
 - If you have a VS system without a VMP, the Configuration dialog box appears. Continue with the next step.
6. Specify your credentials in the Configuration dialog box as follows, and then click Next. If you are upgrading the connector from a previous installation, the credentials are cached for you.

Field	Description
Organization Service User	Enter the Integration User ID from the Vocera Secure Texting Administration Console.
Secret Key	Enter the Shared Key from the Vocera Secure Texting Administration Console.



Vocera Secure Texting Connector - InstallShield Wizard

VST Server Configuration
Please enter your information.

Enter the connection details of the hosted VST Server

Integration User ID:
S3BeqZwCZcGG

Shared Key:
.....

InstallShield

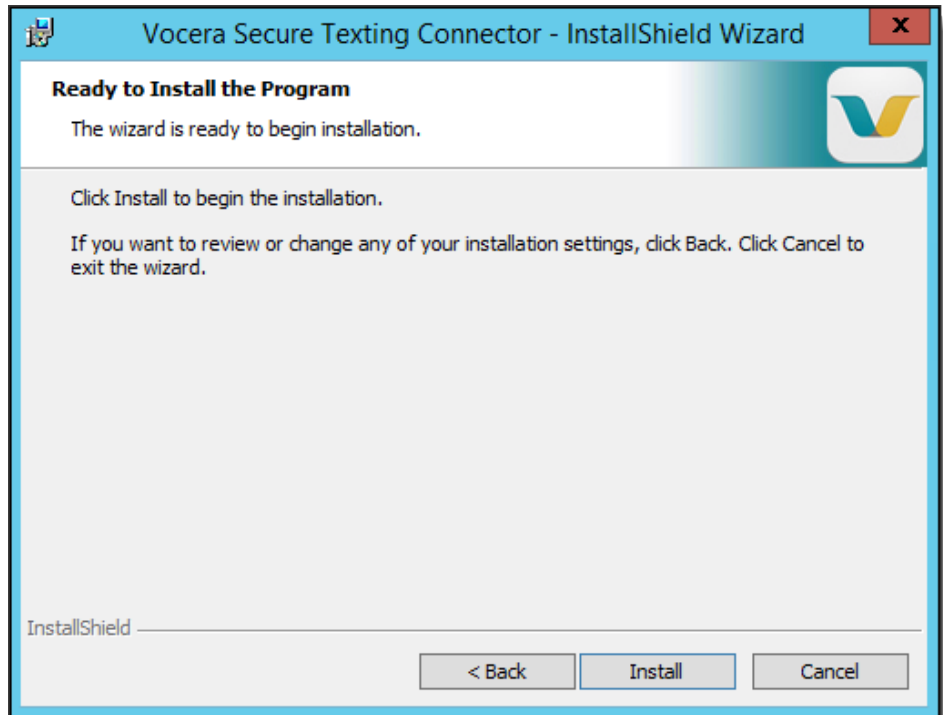
< Back Next > Cancel



Note: If your computer is running internet protection software, you may need to trust the URLs that are used to validate credentials.

The Ready to Install the Program dialog box appears.

7. Click Install.



Vocera Secure Texting Connector - InstallShield Wizard

Ready to Install the Program
The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

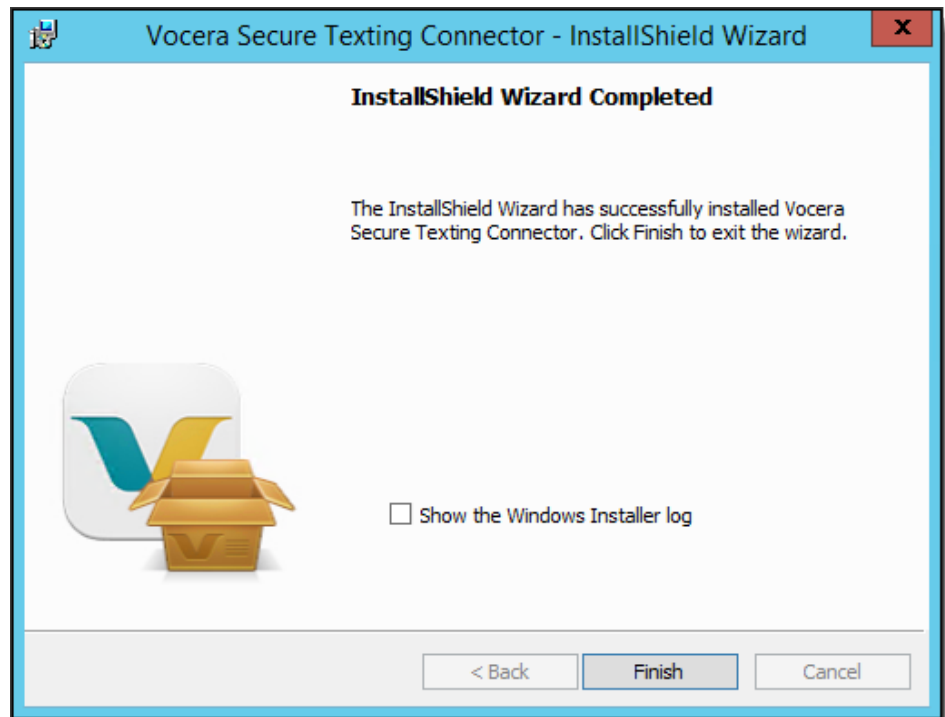
InstallShield

< Back Install Cancel

The Installer stops any necessary services on the Vocera Voice Server, begins installing the Vocera Secure Texting Sync Connector, and displays a progress bar to indicate the

status. The VS Administration Console, User Console, and Staff Assignment Console are not available while the services are stopped and restarted, but there is no impact to voice traffic. The Installer restarts these stopped services when the installation is complete.

8. When the installation is complete, click Finish.



The Vocera Secure Texting Sync Connector is installed.

After you have completed the installation, the results vary depending on your environment:

- If you have installed **VSTSetup-VS-Only.exe** (that is, your on-premises environment has a Vocera Voice Server without a Vocera Messaging Platform server):
 - The Vocera Secure Texting Sync Connector service is running.
 - The *Vocera Sync Adapter Status* on the *Integrations* page of the Vocera Secure Texting Administration Console is set to *Connected*.
 - The **vst.war** file is installed in the `\vocera\tomcat\webapps` directory.
- If you have installed **VSTSetup-VS-VMP.exe** (that is, your on-premises environment has both a Vocera Voice Server and also a Vocera Messaging Platform server):
 - The **vst.war** file is installed in the `\vocera\tomcat\webapps` directory.



Note: **vst.war** is installed with the Vocera Secure Texting Sync Connector if you are using VS 5.1.x or earlier. **vst.war** is installed with the Vocera Voice Server itself if you are using VS 5.2.x or later.

In addition, one of the following situations occurs:

- If the database of the Vocera Voice Server contains data, the groups **VSTContacts** and **VSTUsers** are created in the *Global* site of the Vocera Voice Server.
- If the database of the Vocera Voice Server is empty, the groups **VSTContacts** and **VSTUsers** are created as soon as you create a user or a group in the Vocera Voice Server.

How to Install the VST Sync Connector on a Clustered VS

Use the steps in this topic to install the Vocera Secure Texting Sync Connector software on a clustered Vocera Voice Server.

To install the Vocera Secure Texting Sync Connector:

1. Set up the Vocera Voice Server cluster.
See the Vocera Voice Server documentation.
2. Install the Vocera Secure Texting Sync Connector on the standby node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.
When the installation is complete, the groups VSTContacts and VSTUsers are not yet created in the Vocera Voice Server.
3. Install the Vocera Secure Texting Sync Connector on the active node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.



Note: The installer stops Tomcat to install the VST Sync Connector on the active node. Voice calls are not interrupted, but the Vocera Voice Server Administration Console, User Console, and Staff Assignment Console are not available until the installation is complete (a few minutes).

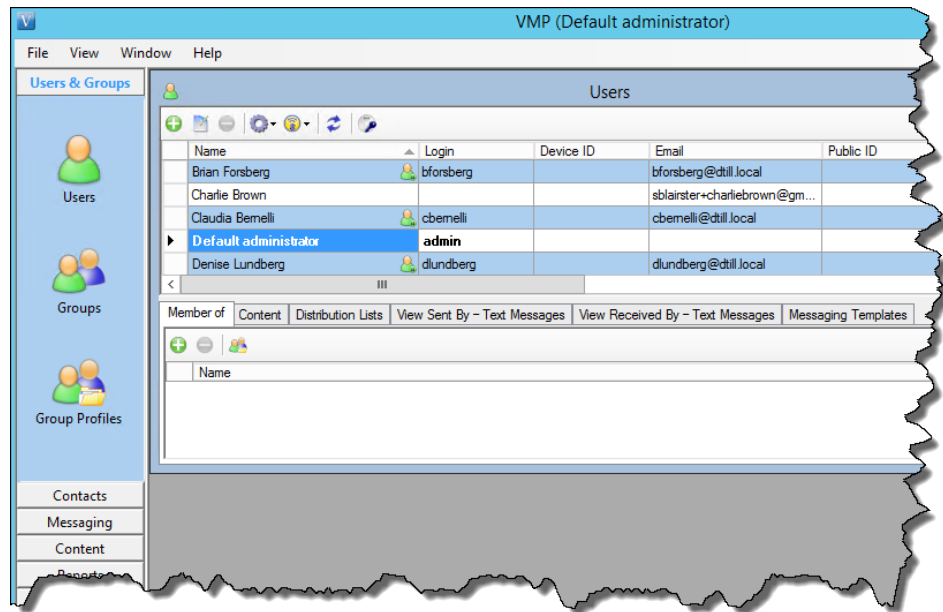
When the installation is finished, the Vocera Secure Texting Sync Connector on the active node makes a connection to the Vocera Secure Texting server. Also, the groups VSTContacts and VSTUsers are created in the Global site of the Vocera Voice Server.

How to Connect the On-Premises Solution to VST

When your on-premises solution includes VMP 5.2.0, you must enable the cloud integration through the VMP Administrator and provide it with credentials that allows it to connect to the VST server.

To supply VST credentials in the Vocera Messaging Platform

1. Launch the VMP Administrator and log in as described in the *Vocera Messaging Platform Administration Guide*.



The VMP Administrator displays the Users & Groups module.

2. Click Configuration in the sidebar menu on the left.

3. Click **System Options** in the sidebar menu.

System Options	
System and Networking	
Networking	
Vocera Messaging Server Public Host Name / IP	10.37.107.159
Vocera Messaging Server Internal Host Name / IP	10.37.107.159
Email	
Enable Outgoing Email	No
Display Name	
Email Address	
SMTP Server	
SMTP Port	25
SMTP Authentication	No
Security	
Device Validation Certificate	Add
Enforce SSL for Smartphone connections	No
Enforce App PIN	SHARED
App PIN Timeout (in seconds)	300
Enforce device password for all smartphones	No
Minimum Password Length	5
Description	

4. Scroll to display the Vocera Secure Texting App - Message Exchange section of the dialog box.

System Options

Enabled	Yes
Integrations	
Vocera Voice	
Enabled	Yes
IP Addresses	10.37.107.152
Port	80
Use HTTPS	No
VCG IP Addresses	
VMI Message Expiry (in minutes)	5
Enable Enhanced Voice Server NIO Tomcat Feature	No
Vocera Secure Texting App – Message Exchange	
Enabled	No
User ID	
Shared Key	
Email	
Enable Secure Message Initiation	No
Secure Message Initiation – Incoming Mail	
Protocol	POP3

Description

OK

Cancel

Help

5. Enable the VST - VMP integration as follows and click OK:

Field	Description
Enabled	Set Enabled to Yes.
User ID	Enter the Integration User ID from the Vocera Secure Texting Administration Console.
Shared Key	Enter the Shared Key from the Vocera Secure Texting Administration Console.

The System Options dialog box closes.

Populating the VST Directory with On-Premises Users

When your on-premises environment meets the VST prerequisites for the Vocera Voice Server—either through the use of VS 5.2.0 or through the installation of the Vocera Secure Texting Sync Connector on earlier versions of VS—the system automatically creates the VSTContacts and VSTUsers groups in the Global site of the Vocera Voice Server. These groups provide additional communication and internal system capabilities.

- Members of the VSTContacts group appear in the Directory list of the VST Handheld Client and the VST Web Client.

You manually maintain the membership of the `VSTContacts` group. Populate this group with on-premises users who need to be available to VST users. VST app users who are members of your organization or one of its affiliates can then communicate with these on-premises users by calling and sending them text messages.

Make sure both your badge and VCS users are set up as Vocera Voice Server users before you populate `VSTContacts`. The membership of `VSTContacts` controls the display of all on-premises users in the VST clients.

- The Vocera Secure Texting Sync Connector automatically maintains the membership of the `VSTUsers` group.

This group is used only for internal system purposes. The Vocera Secure Texting Sync Connector automatically populates the membership of this group with the name of the VST organization the Vocera Voice Server is connected to, as well as the names of any practices associated with the VST organization.

The Vocera Voice Server treats each group member as a user, creating a profile for it, and entering the organization's auto-generated `Voice Number` from the Vocera Secure Texting Administration Console into the profile. The Vocera Voice Server dials the phone number when badge users place calls to the organization by name in a voice command. Also, if a badge user receives a call from a VST user, the name of the calling organization flashes on the user's badge.

When the database of the Vocera Voice Server contains data (that is, during an upgrade), the `VSTContacts` and `VSTUsers` groups are created immediately. When the database of the VS is empty (that is, during a new installation), the `VSTContacts` and `VSTUsers` groups are created as soon as you create a user or a group in the Vocera Voice Server.



Note: In the Vocera Voice Server Administration Console, set the `VSTContacts` group to Permission Only to minimize impact to speech recognition. See the *Vocera Voice Server Administration Console Guide* for information on setting the Permission Only property.

How to Set Up On-Premises Users as VST Contacts

Specify the badge and VCS users who will appear as contacts in the VST Handheld Client and VST Web Client. VST users will be able to text and call these on-premises users.

When you install the Vocera Secure Texting Sync Connector, the groups `VSTContacts` and `VSTUsers` are automatically created on the Vocera Voice Server. You need to add Vocera Voice Server users to the `VSTContacts` group to make them show up as contacts in the VST app.

1. Log into the Vocera Voice Server Administration Console.
2. Select `Groups` in the sidebar menu on the left.
The `Add, Edit, and Delete Groups` page appears.
3. Select the `VSTContacts` group and choose `Edit Group`.
The `Edit Group` dialog box appears.
4. Select the `Member` tab.
The `Add, Delete, and Re-Order Group Members` page of the `Edit Group` dialog box appears.
5. Click `Add Name`.
The `Select User or Group` dialog box appears.
6. Select the users and groups you want to add as members of `VSTContacts` and click `Finish`.
The users and groups appear in the `Edit Group` dialog box.
7. Click `Save`.
The `Edit Group` dialog box closes, and the Vocera Voice Server updates the membership of `VSTContacts`.

The next time the Vocera Secure Texting Sync Connector runs, it syncs the users in the `VSTContacts` group with the hosted VST database.

See [How to View Integration Details](#) on page 24 for information about confirming the sync operation.

How to View Integration Details

After you have integrated your on-premises solution with VST, you can review the list of users who have been imported to VST and also the results of each import. You may want to use this information if it is necessary to troubleshoot the integration.

1. Log into the Vocera Secure Texting Administration Console.

The Update Organization page for your organization appears.

The screenshot shows the 'Update Organization' page in the Vocera Secure Texting Administration Console. The page is titled 'Update Organization' and is part of the 'SYSTEM ADMIN / AUGUSTINE MEDICAL CENTER' section. The 'Organization Details' section includes the following fields:

- Group ID:** 413
- Group name Required:** Augustine Medical Center
- Office number Required:** (408) 882-5830
- Voice number:** (408) 550-7227
- Default time zone:** US/Pacific

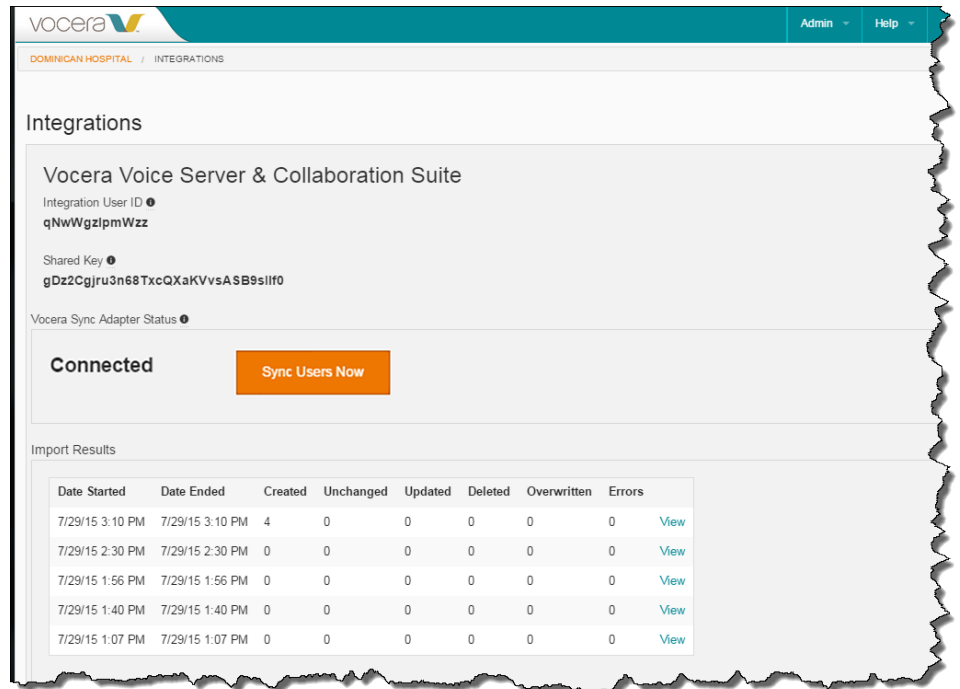
The 'Secure Message Options' section includes the following settings:

- Members can send messages to whole organization:** Yes
- Message Expiration Time:** 7 Days
- Allow messages to non-users via email and SMS:** Yes
- High Priority Notification Sound Length:** 30 Seconds

At the bottom right, there are 'Cancel' and 'Save' buttons.

2. Select Admin > Integrations from the menu at the top right of any page.

The Integrations page appears.



3. Review the Vocera Sync Adapter Status section to confirm that the status is set to "Connected".
4. Review the Import Results section to see details about each successive import from the on-premises system. The most recent import operation appears at the top of the list. Optionally click View to display the Import User Process page and review the type of update that occurred for each imported user.

Integrations Page Reference

View details about the sync adapter status for a specific organization.

Table 8: Vocera Voice Server & Collaboration Suite

Field	Description
Integration User ID	The Integration User ID is similar to a user name used to log into a web site. The Vocera Sync Adapter uses this ID when connecting to the VST server. Copy this ID and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Shared Key	The Shared Key is similar to a password, although the raw value is never used on its own. Copy this value and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Vocera Sync Adapter Status	Displays either Connected or Not Connected to indicate whether the VST cloud server is connected to your on-premises system. The status is checked and updated every 10 seconds.
Sync Users Now	Click to sync Vocera Secure Texting Sync Connector and Vocera Voice Server users immediately. This operation is not usually necessary; the sync occurs automatically every 90 minutes.

Table 9: Import Results

Field	Description
Date Started	The date and time the import user operation began. The most recent operation appears first.
Date Ended	The date and time the import user operation ended. The most recent operation appears first.
Created	The number of new users created by import from the Vocera Voice Server.

Field	Description
Unchanged	The number of user profiles that did not change after the import from the Vocera Voice Server.
Updated	The number of user profiles changed as a result of the import from the Vocera Voice Server.
Deleted	The number of user profiles deleted as a result of the import from the Vocera Voice Server.
Overwritten	The number of user profiles overwritten as a result of the import from the Vocera Voice Server.
Errors	The number of errors that occurred as a result of the import from the Vocera Voice Server.
View	Click to display the User Import Report page, containing details of the import for each user.

Import User Process Page Reference

Table 10: Imported Users

Field	Description
Change Type	Displays one of the values CREATED, UPDATED, DELETED, or NONE to indicate the type of change that occurred.
Staff ID	An internal unique identifier for each user, generated by the Vocera Secure Texting system.
External ID	A unique identifier for each user, generated by the on-premises system.
Name	The first and last name of each user.
Message	Displays messages from the server about the import operation, if any exist.

Imported User Page Reference

Table 11: Imported User

Field	Description
StaffID	The internal staff ID number for this user, which is automatically generated and cannot be changed.
First Name	The first name (given name) of the user. This field is required, and can be edited by an administrator only.
Middle Name	The user's middle name.
Last Name	The last name (family name) of the user. This field is required, and can be edited by an administrator only.
Badge Phone Number	Displays the value of the Guest Access Number concatenated with the value of the user's Desk Phone or Extension. These values are imported from the Vocera Voice Server.
External ID	A unique identifier for each user, generated by the on-premises system.

Populating the VCS Contacts List with VST Users

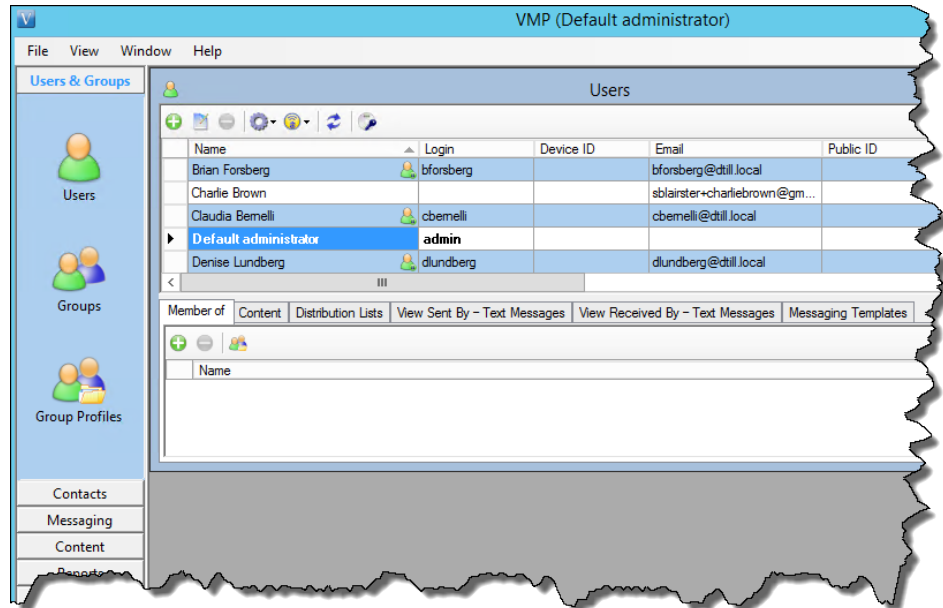
After your VST cloud environment is correctly integrated with the on-premises environment, all VST users in your own organization and any affiliated organizations are synced to the VMP automatically at 90-minute intervals. These users automatically become members in the VST Users distribution list; specify the access permissions on this DL to control which VMP users are able to view the VST users as contacts.

How to Set Up VST Users as VCS Contacts

The users in your own VST organization and its affiliates appear as members of the VST Users distribution list in VMP. Specify access control permissions on this DL to allow the VST users to appear as contacts in the VCS Handheld Client. VCS users will be able to send text messages to these users.

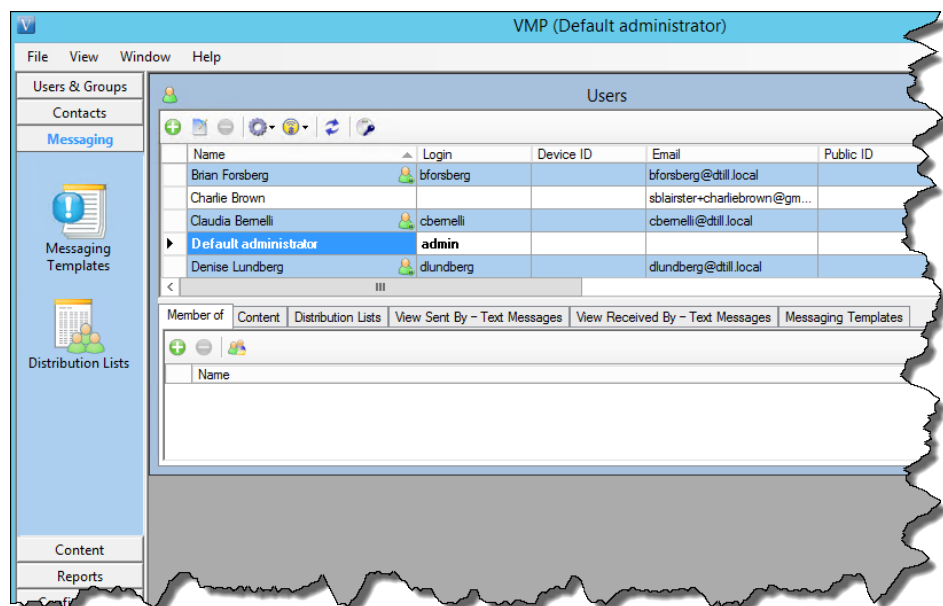
Provide VCS users access to the VST Users distribution list to make the VST users show up as contacts in the VCS application.

1. Launch the VMP Administrator and log in as described in the *Vocera Messaging Platform Administration Guide*.



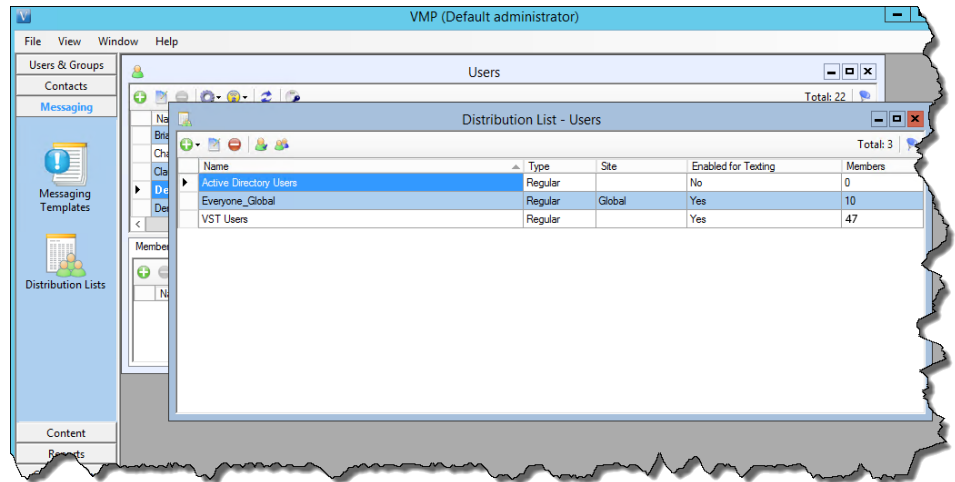
The VMP Administrator displays the Users & Groups module.

2. Click Messaging in the sidebar menu on the left.



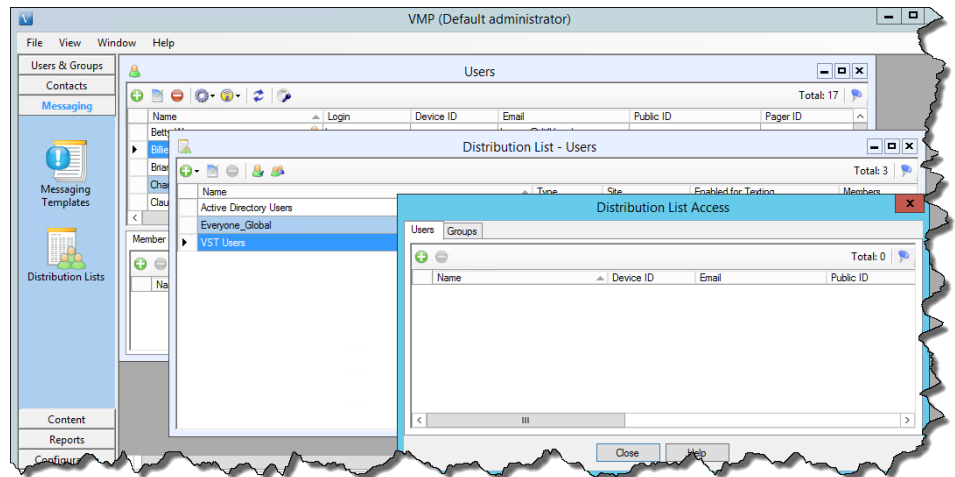
A list of Messaging module views appears in the sidebar menu.

3. Click Distribution Lists in the sidebar menu.



The Distribution Lists - Users window appears.

4. Select the VST Users distribution list exists and click the Manage Access icon.

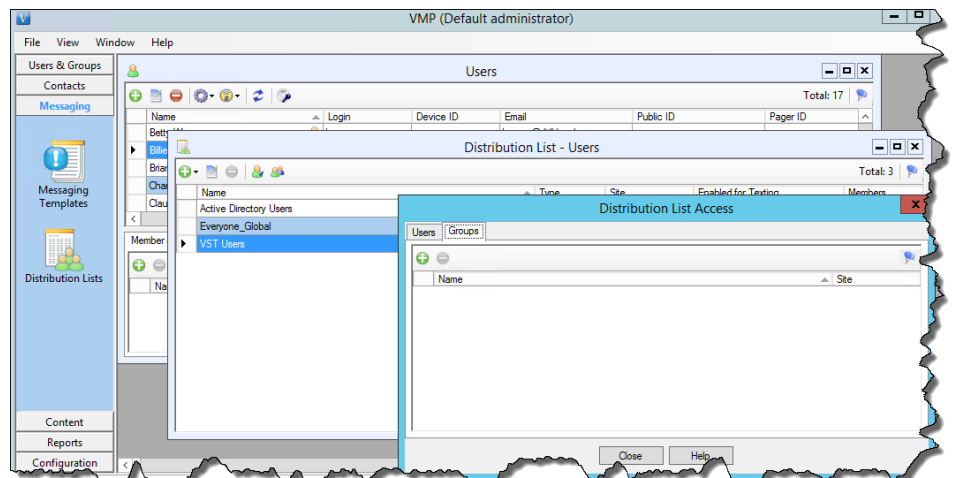


The Distribution List Access window appears.

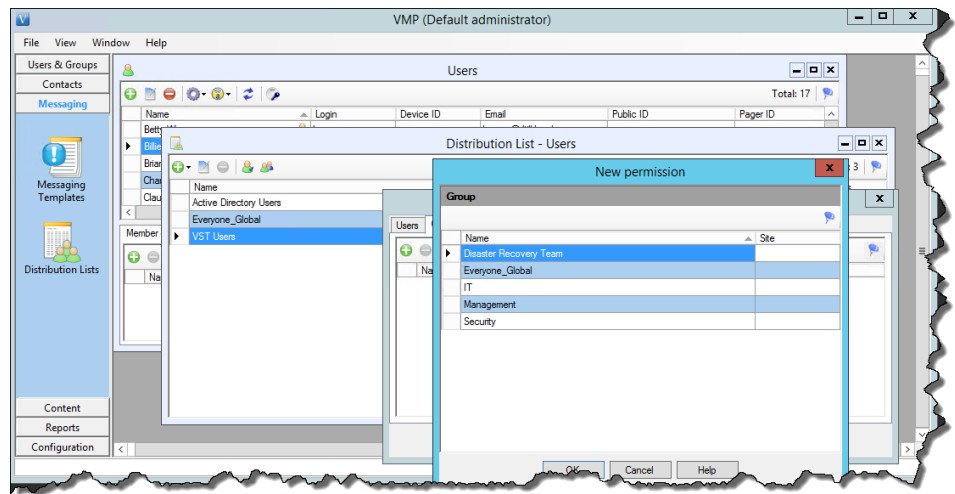


Note: The remaining steps in this procedure show you how to grant all VMP users the ability to see VST users as contacts. You can control access to this distribution list more finely as described in the *Vocera Messaging Platform Administration Guide*.

5. Click the Groups tab to grant access to this DL at the group level.

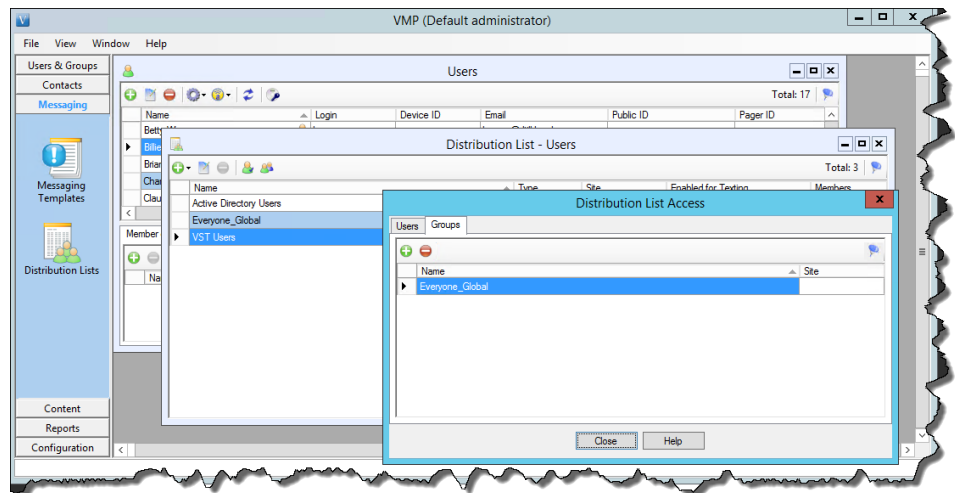


6. Click the Add icon.



The New Permission window appears.

7. Select Everyone_Global and click OK.



The Everyone_Global group Distribution List Access window appears.

The members of the VST Users distribution list appear as Contacts in the handheld client of all VCS users.

Integrating VST with VS Only (no VMP)

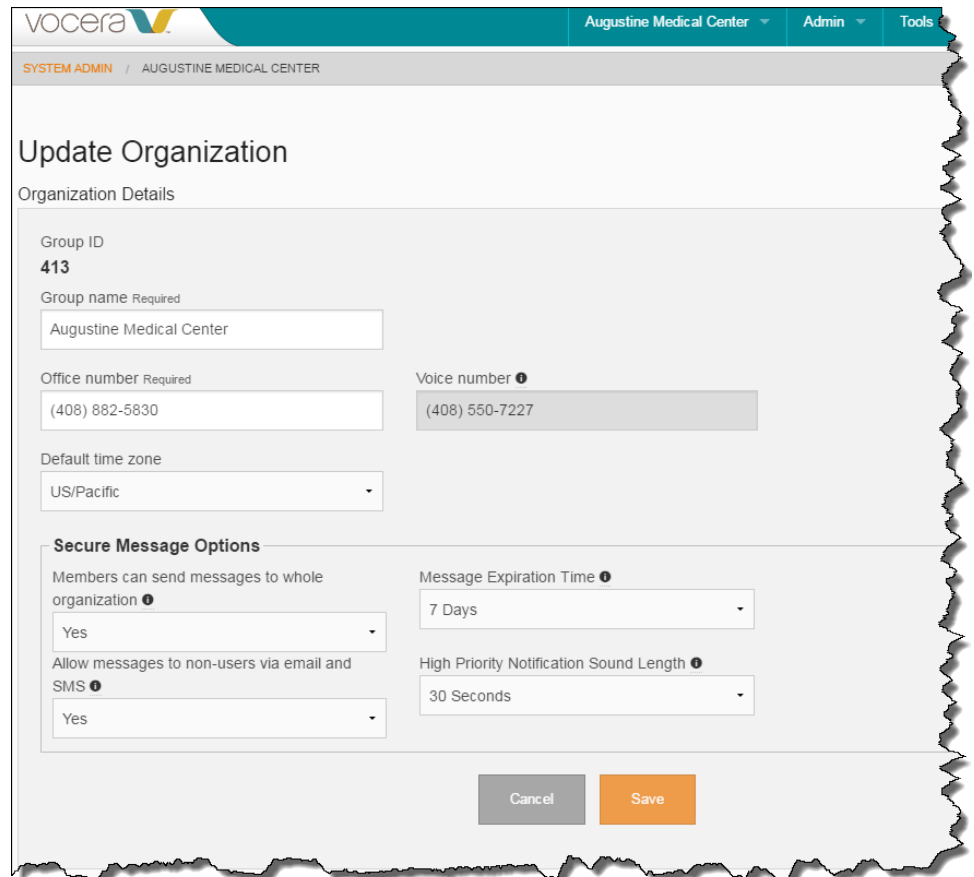
If you already have an existing Vocera Voice Server without a Vocera Messaging Platform in your on-premises environment, follow the steps in this section to integrate it with the Vocera Secure Texting cloud platform.

How to Generate an Integration Key

Generate an Integration User ID and a Shared Key in the Vocera Secure Texting Administration Console. Together, these values act as credentials that allow the on-premises solution to log into the Vocera Secure Texting cloud application.

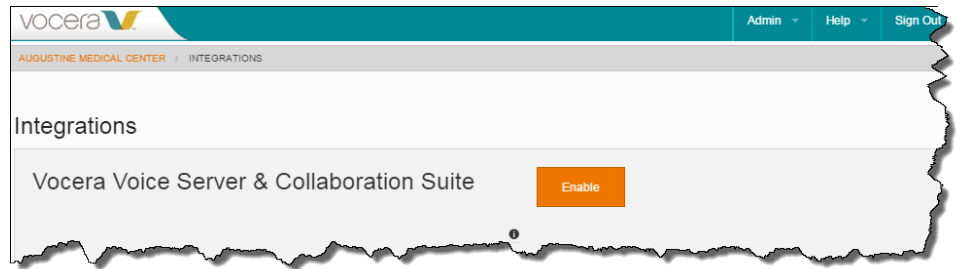
1. Log into the Vocera Secure Texting Administration Console.

The Update Organization page for your organization appears.



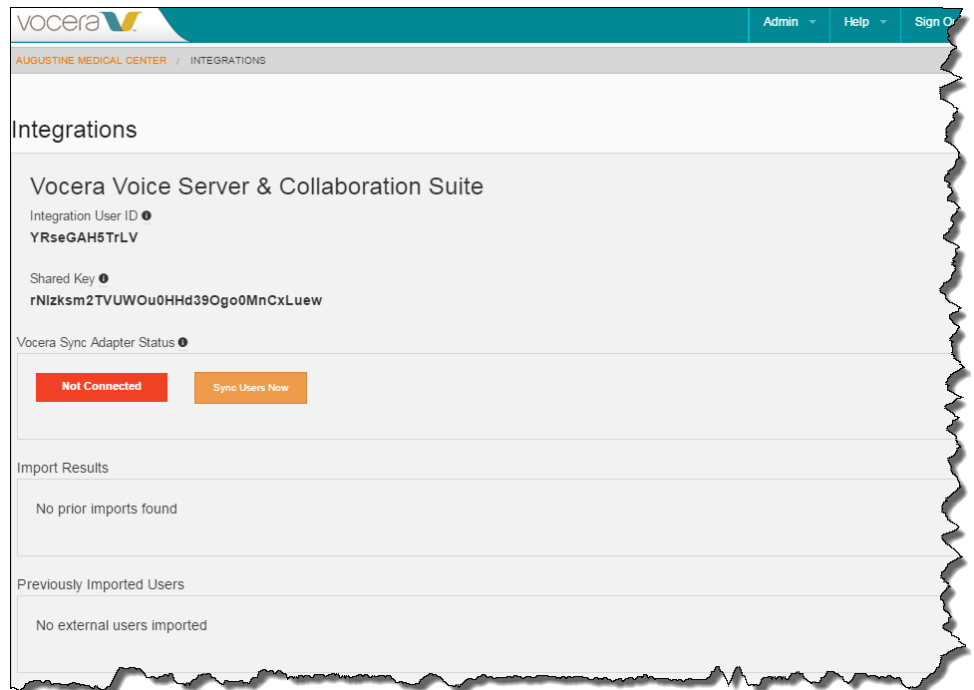
The screenshot shows the 'Update Organization' page in the Vocera Secure Texting Administration Console. The page has a teal header with the Vocera logo and navigation links for 'Augustine Medical Center', 'Admin', and 'Tools'. Below the header, the breadcrumb 'SYSTEM ADMIN / AUGUSTINE MEDICAL CENTER' is visible. The main heading is 'Update Organization', followed by 'Organization Details'. The form contains several fields: 'Group ID' (413), 'Group name Required' (Augustine Medical Center), 'Office number Required' ((408) 882-5830), 'Voice number' ((408) 550-7227), and 'Default time zone' (US/Pacific). A 'Secure Message Options' section includes 'Members can send messages to whole organization' (Yes), 'Allow messages to non-users via email and SMS' (Yes), 'Message Expiration Time' (7 Days), and 'High Priority Notification Sound Length' (30 Seconds). At the bottom right are 'Cancel' and 'Save' buttons.

2. Choose Admin > Integrations.
The Integrations page appears.



3. Click Enable.

The Integrations page refreshes and the Integration User ID and Shared Key values appear.



Make a note of these values; you need to enter them when you install the Vocera Secure Texting Sync Connector.

Installing the Vocera Secure Texting Sync Connector

If you have a version of Vocera Voice Server earlier than 5.2.0 or if you do not have a Vocera Messaging Platform server in your on-premises environment, you must install the VST Sync Connector on your Vocera Voice Server machine or cluster.

How to Install the VST Sync Connector on a Non-Clustered VS

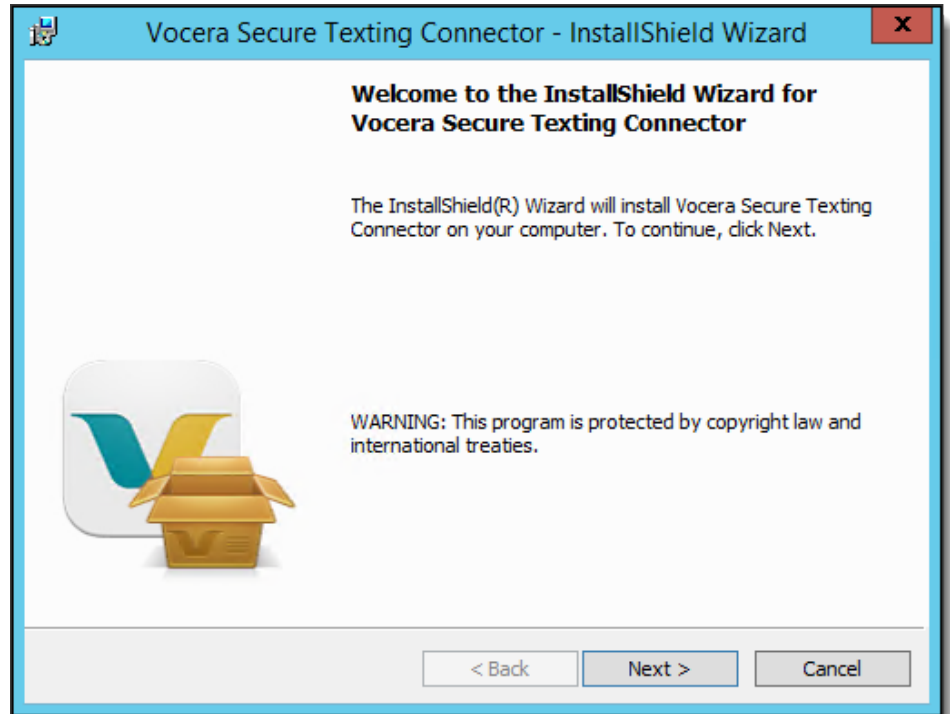
Use the steps in this topic to install the Vocera Secure Texting Sync Connector software on a stand-alone (non-clustered) Vocera Voice Server.

The Vocera Secure Texting Sync Connector installer requires Windows .Net Framework version 4.7.1. It will not install in environments with earlier versions of the .Net Framework. If necessary, download the .Net Framework from Microsoft and install it before you begin. Make sure you do not also install IIS, which will interfere with Apache on the Vocera Voice Server machine.

To install the Vocera Secure Texting Sync Connector:

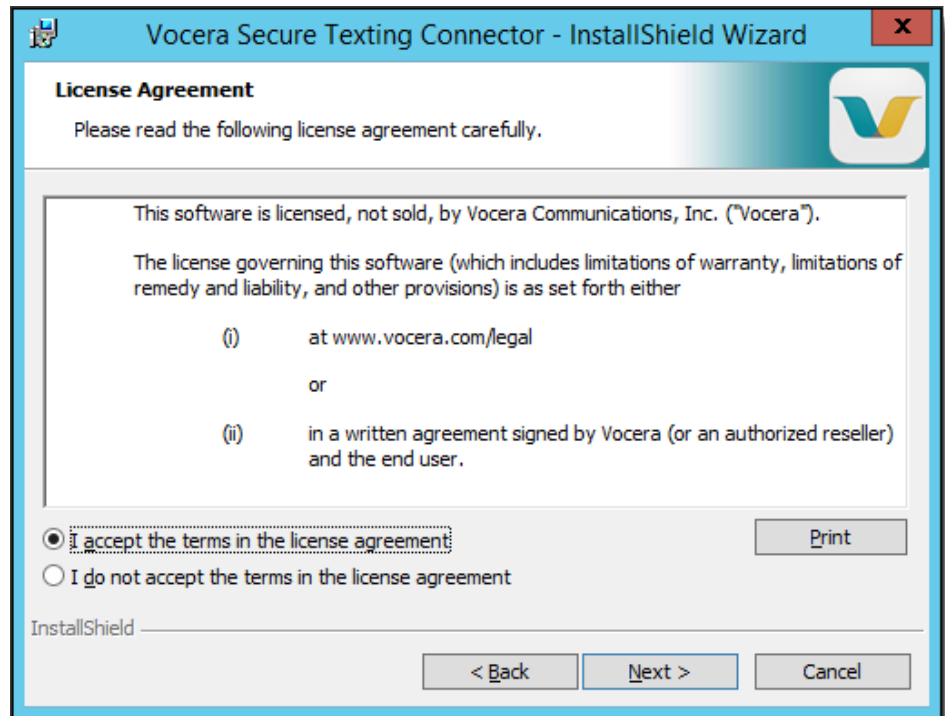
1. Log into the Vocera Voice Server computer with administrator privileges.
2. Download the Vocera Secure Texting Sync Connector installer to the desktop.

- If your on-premises solution has both the Vocera Voice Server and the Vocera Messaging Platform, download the **VSTSetup-VS-VMP.exe** file.
 - If your on-premises solution has only the Vocera Voice Server, download the **VSTSetup-VS-Only.exe** file.
3. Double-click the installer to start the installation.
The Welcome dialog box appears.
 4. Click **Next** in the Welcome dialog box.



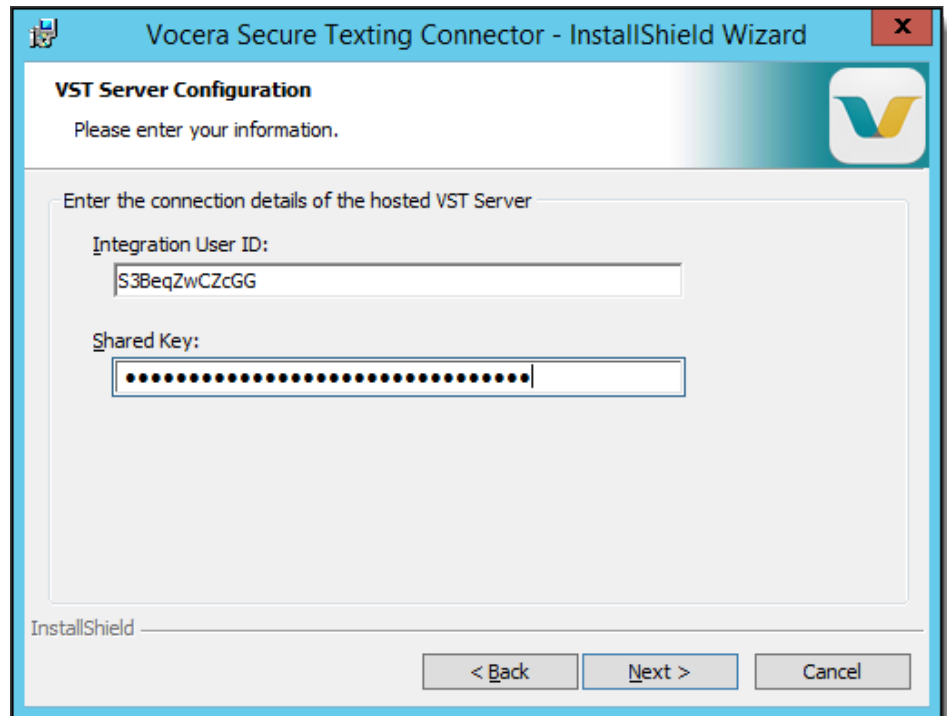
The License Agreement dialog box appears.

5. In the License Agreement dialog box, select **I accept the terms in the license agreement** and click **Next**.



- If you have a VS-VMP the Ready to Install the Program dialog box appears. Continue with Step 7.
 - If you have a VS system without a VMP, the Configuration dialog box appears. Continue with the next step.
6. Specify your credentials in the Configuration dialog box as follows, and then click Next. If you are upgrading the connector from a previous installation, the credentials are cached for you.

Field	Description
Organization Service User	Enter the Integration User ID from the Vocera Secure Texting Administration Console.
Secret Key	Enter the Shared Key from the Vocera Secure Texting Administration Console.



Vocera Secure Texting Connector - InstallShield Wizard

VST Server Configuration
Please enter your information.

Enter the connection details of the hosted VST Server

Integration User ID:
S3BeqZwCZcGG

Shared Key:
.....

InstallShield

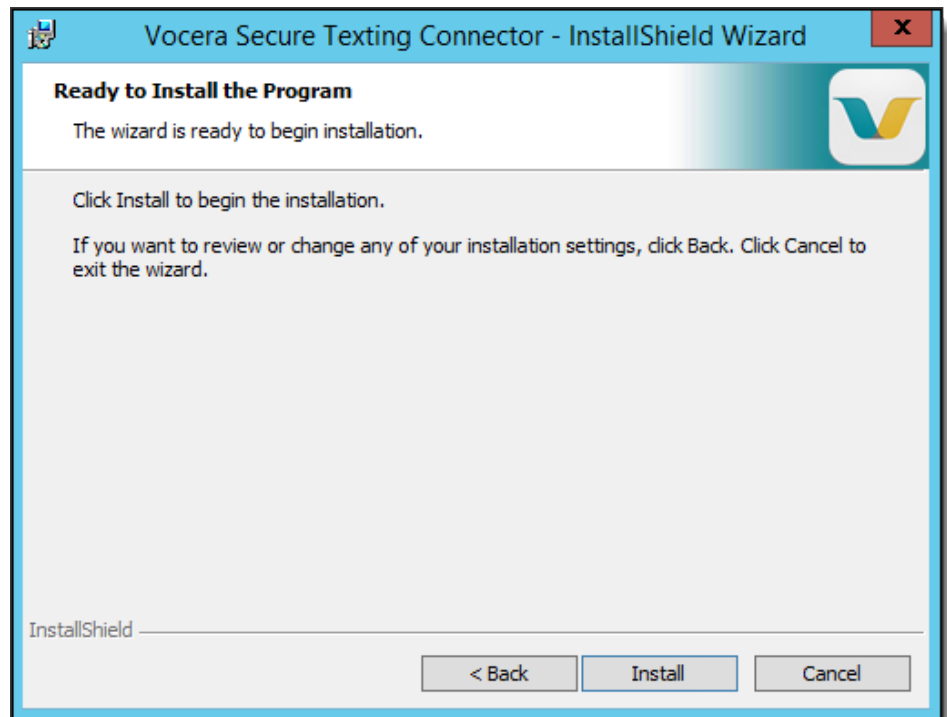
< Back Next > Cancel



Note: If your computer is running internet protection software, you may need to trust the URLs that are used to validate credentials.

The Ready to Install the Program dialog box appears.

7. Click Install.



Vocera Secure Texting Connector - InstallShield Wizard

Ready to Install the Program
The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

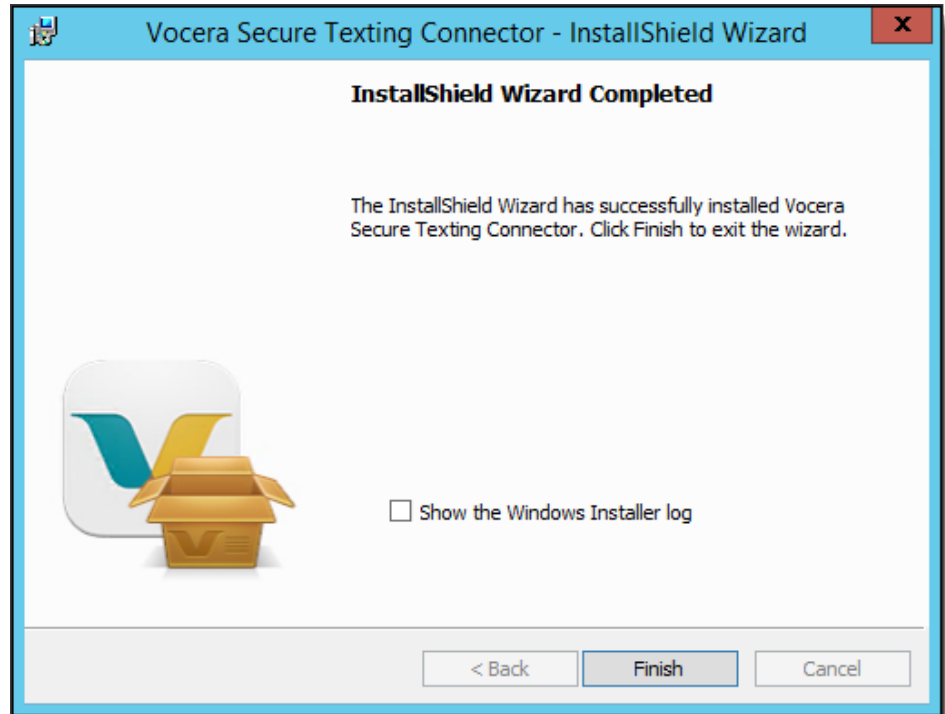
InstallShield

< Back Install Cancel

The Installer stops any necessary services on the Vocera Voice Server, begins installing the Vocera Secure Texting Sync Connector, and displays a progress bar to indicate the

status. The VS Administration Console, User Console, and Staff Assignment Console are not available while the services are stopped and restarted, but there is no impact to voice traffic. The Installer restarts these stopped services when the installation is complete.

8. When the installation is complete, click Finish.



The Vocera Secure Texting Sync Connector is installed.

After you have completed the installation, the results vary depending on your environment:

- If you have installed **VSTSetup-VS-Only.exe** (that is, your on-premises environment has a Vocera Voice Server without a Vocera Messaging Platform server):
 - The Vocera Secure Texting Sync Connector service is running.
 - The Vocera Sync Adapter Status on the Integrations page of the Vocera Secure Texting Administration Console is set to Connected.
 - The **vst.war** file is installed in the **\vocera\tomcat\webapps** directory.
- If you have installed **VSTSetup-VS-VMP.exe** (that is, your on-premises environment has both a Vocera Voice Server and also a Vocera Messaging Platform server):
 - The **vst.war** file is installed in the **\vocera\tomcat\webapps** directory.



Note: **vst.war** is installed with the Vocera Secure Texting Sync Connector if you are using VS 5.1.x or earlier. **vst.war** is installed with the Vocera Voice Server itself if you are using VS 5.2.x or later.

In addition, one of the following situations occurs:

- If the database of the Vocera Voice Server contains data, the groups **VSTContacts** and **VSTUsers** are created in the **Global** site of the Vocera Voice Server.
- If the database of the Vocera Voice Server is empty, the groups **VSTContacts** and **VSTUsers** are created as soon as you create a user or a group in the Vocera Voice Server.

How to Install the VST Sync Connector on a Clustered VS

Use the steps in this topic to install the Vocera Secure Texting Sync Connector software on a clustered Vocera Voice Server.

To install the Vocera Secure Texting Sync Connector:

1. Set up the Vocera Voice Server cluster.
See the Vocera Voice Server documentation.
2. Install the Vocera Secure Texting Sync Connector on the standby node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.
When the installation is complete, the groups VSTContacts and VSTUsers are not yet created in the Vocera Voice Server.
3. Install the Vocera Secure Texting Sync Connector on the active node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.



Note: The installer stops Tomcat to install the VST Sync Connector on the active node. Voice calls are not interrupted, but the Vocera Voice Server Administration Console, User Console, and Staff Assignment Console are not available until the installation is complete (a few minutes).

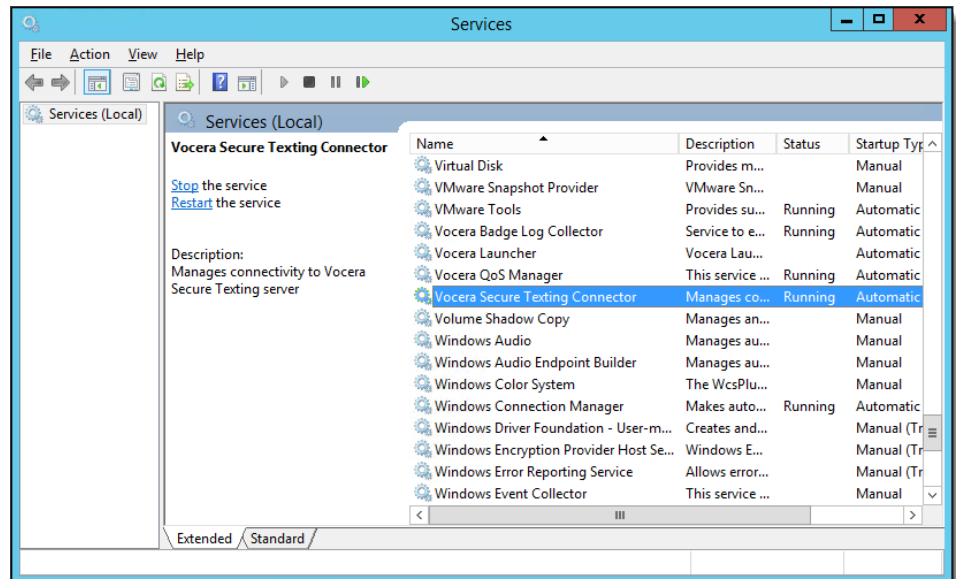
When the installation is finished, the Vocera Secure Texting Sync Connector on the active node makes a connection to the Vocera Secure Texting server. Also, the groups VSTContacts and VSTUsers are created in the Global site of the Vocera Voice Server.

How to Confirm the Vocera Secure Texting Sync Connector

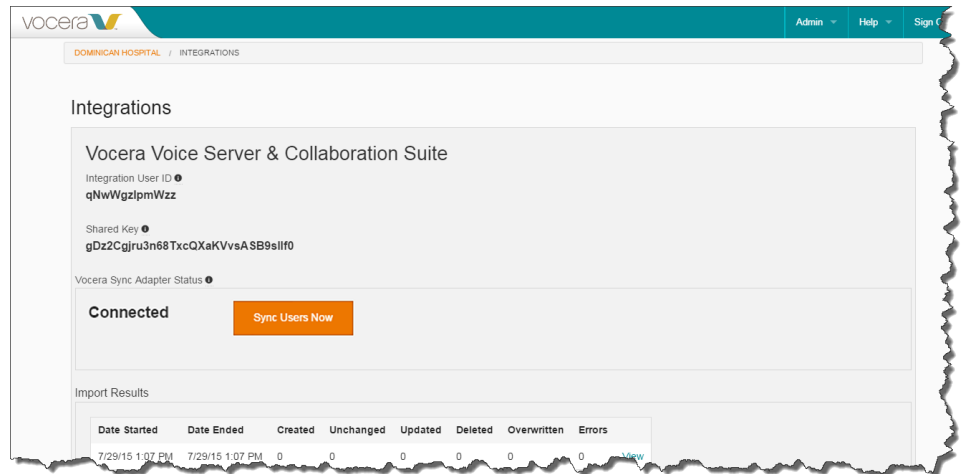
After you run the `VSTSetup-VS-Only.exe` installation program you can confirm that the installation succeeded on the Vocera Voice Server machine.

To make sure the Vocera Secure Texting Sync Connector installed successfully:

1. Open the Services Control Panel on the Vocera Secure Texting Sync Connector machine.
2. Look for the Vocera Secure Texting Connector service and confirm that its Status is set to Running.



3. Close the Services Control Panel.
4. Log into the Vocera Secure Texting Administration Console.
5. Select Admin > Integrations from the menu at the top right of any page.
The Integrations page appears, and the Vocera Sync Adapter Status and Import Results sections are visible. The Vocera Sync Adapter Status is set to Connected.



Populating the VST Directory with On-Premises Users

When your on-premises environment meets the VST prerequisites for the Vocera Voice Server—either through the use of VS 5.2.0 or through the installation of the Vocera Secure Texting Sync Connector on earlier versions of VS—the system automatically creates the **VSTContacts** and **VSTUsers** groups in the Global site of the Vocera Voice Server. These groups provide additional communication and internal system capabilities.

- Members of the **VSTContacts** group appear in the **Directory** list of the VST Handheld Client and the VST Web Client.

You manually maintain the membership of the **VSTContacts** group. Populate this group with on-premises users who need to be available to VST users. VST app users who are members of your organization or one of its affiliates can then communicate with these on-premises users by calling and sending them text messages.

Make sure both your badge and VCS users are set up as Vocera Voice Server users before you populate **VSTContacts**. The membership of **VSTContacts** controls the display of all on-premises users in the VST clients.

- The Vocera Secure Texting Sync Connector automatically maintains the membership of the **VSTUsers** group.

This group is used only for internal system purposes. The Vocera Secure Texting Sync Connector automatically populates the membership of this group with the name of the VST organization the Vocera Voice Server is connected to, as well as the names of any practices associated with the VST organization.

The Vocera Voice Server treats each group member as a user, creating a profile for it, and entering the organization's auto-generated **Voice Number** from the Vocera Secure Texting Administration Console into the profile. The Vocera Voice Server dials the phone number when badge users place calls to the organization by name in a voice command. Also, if a badge user receives a call from a VST user, the name of the calling organization flashes on the user's badge.

When the database of the Vocera Voice Server contains data (that is, during an upgrade), the **VSTContacts** and **VSTUsers** groups are created immediately. When the database of the VS is empty (that is, during a new installation), the **VSTContacts** and **VSTUsers** groups are created as soon as you create a user or a group in the Vocera Voice Server.



Note: In the Vocera Voice Server Administration Console, set the **VSTContacts** group to **Permission Only** to minimize impact to speech recognition. See the *Vocera Voice Server Administration Console Guide* for information on setting the **Permission Only** property.

How to Set Up On-Premises Users as VST Contacts

Specify the badge and VCS users who will appear as contacts in the VST Handheld Client and VST Web Client. VST users will be able to text and call these on-premises users.

When you install the Vocera Secure Texting Sync Connector, the groups `VSTContacts` and `VSTUsers` are automatically created on the Vocera Voice Server. You need to add Vocera Voice Server users to the `VSTContacts` group to make them show up as contacts in the VST app.

1. Log into the Vocera Voice Server Administration Console.
2. Select **Groups** in the sidebar menu on the left.
The **Add, Edit, and Delete Groups** page appears.
3. Select the `VSTContacts` group and choose **Edit Group**.
The **Edit Group** dialog box appears.
4. Select the **Member** tab.
The **Add, Delete, and Re-Order Group Members** page of the **Edit Group** dialog box appears.
5. Click **Add Name**.
The **Select User or Group** dialog box appears.
6. Select the users and groups you want to add as members of `VSTContacts` and click **Finish**.
The users and groups appear in the **Edit Group** dialog box.
7. Click **Save**.
The **Edit Group** dialog box closes, and the Vocera Voice Server updates the membership of `VSTContacts`.

The next time the Vocera Secure Texting Sync Connector runs, it syncs the users in the `VSTContacts` group with the hosted VST database.

See [How to View Integration Details](#) on page 24 for information about confirming the sync operation.

How to View Integration Details

After you have integrated your on-premises solution with VST, you can review the list of users who have been imported to VST and also the results of each import. You may want to use this information if it is necessary to troubleshoot the integration.

1. Log into the Vocera Secure Texting Administration Console.
The **Update Organization** page for your organization appears.

Update Organization

Organization Details

Group ID
413

Group name Required
Augustine Medical Center

Office number Required
(408) 882-5830

Voice number ⓘ
(408) 550-7227

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization ⓘ
Yes

Allow messages to non-users via email and SMS ⓘ
Yes

Message Expiration Time ⓘ
7 Days

High Priority Notification Sound Length ⓘ
30 Seconds

Cancel Save

2. Select Admin > Integrations from the menu at the top right of any page.
The Integrations page appears.

Integrations

Vocera Voice Server & Collaboration Suite

Integration User ID ⓘ
qNwWgzlpmWzz

Shared Key ⓘ
gDz2CgJru3n68TxcQXaKVvsASB9sIlf0

Vocera Sync Adapter Status ⓘ

Connected Sync Users Now

Import Results

Date Started	Date Ended	Created	Unchanged	Updated	Deleted	Overwritten	Errors	
7/29/15 3:10 PM	7/29/15 3:10 PM	4	0	0	0	0	0	View
7/29/15 2:30 PM	7/29/15 2:30 PM	0	0	0	0	0	0	View
7/29/15 1:56 PM	7/29/15 1:56 PM	0	0	0	0	0	0	View
7/29/15 1:40 PM	7/29/15 1:40 PM	0	0	0	0	0	0	View
7/29/15 1:07 PM	7/29/15 1:07 PM	0	0	0	0	0	0	View

3. Review the Vocera Sync Adapter Status section to confirm that the status is set to "Connected".

- Review the **Import Results** section to see details about each successive import from the on-premises system. The most recent import operation appears at the top of the list. Optionally click **View** to display the **Import User Process** page and review the type of update that occurred for each imported user.

Integrations Page Reference

View details about the sync adapter status for a specific organization.

Table 12: Vocera Voice Server & Collaboration Suite

Field	Description
Integration User ID	The Integration User ID is similar to a user name used to log into a web site. The Vocera Sync Adapter uses this ID when connecting to the VST server. Copy this ID and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Shared Key	The Shared Key is similar to a password, although the raw value is never used on its own. Copy this value and paste it into the appropriate configuration field of the Vocera Sync Adapter.
Vocera Sync Adapter Status	Displays either Connected or Not Connected to indicate whether the VST cloud server is connected to your on-premises system. The status is checked and updated every 10 seconds.
Sync Users Now	Click to sync Vocera Secure Texting Sync Connector and Vocera Voice Server users immediately. This operation is not usually necessary; the sync occurs automatically every 90 minutes.

Table 13: Import Results

Field	Description
Date Started	The date and time the import user operation began. The most recent operation appears first.
Date Ended	The date and time the import user operation ended. The most recent operation appears first.
Created	The number of new users created by import from the Vocera Voice Server.
Unchanged	The number of user profiles that did not change after the import from the Vocera Voice Server.
Updated	The number of user profiles changed as a result of the import from the Vocera Voice Server.
Deleted	The number of user profiles deleted as a result of the import from the Vocera Voice Server.
Overwritten	The number of user profiles overwritten as a result of the import from the Vocera Voice Server.
Errors	The number of errors that occurred as a result of the import from the Vocera Voice Server.
View	Click to display the User Import Report page, containing details of the import for each user.

Import User Process Page Reference

Table 14: Imported Users

Field	Description
Change Type	Displays one of the values CREATED , UPDATED , DELETED , or NONE to indicate the type of change that occurred.
Staff ID	An internal unique identifier for each user, generated by the Vocera Secure Texting system.
External ID	A unique identifier for each user, generated by the on-premises system.
Name	The first and last name of each user.

Field	Description
Message	Displays messages from the server about the import operation, if any exist.

Imported User Page Reference

Table 15: Imported User

Field	Description
StaffID	The internal staff ID number for this user, which is automatically generated and cannot be changed.
First Name	The first name (given name) of the user. This field is required, and can be edited by an administrator only.
Middle Name	The user's middle name.
Last Name	The last name (family name) of the user. This field is required, and can be edited by an administrator only.
Badge Phone Number	Displays the value of the Guest Access Number concatenated with the value of the user's Desk Phone or Extension. These values are imported from the Vocera Voice Server.
External ID	A unique identifier for each user, generated by the on-premises system.

Upgrading Existing VST Integrations

If your on-premises environment is already integrated with VST, follow the steps in this section to upgrade either your Vocera Voice Server or your Vocera Messaging Platform solution. Make sure you upgrade the 2.0.x VST Sync Connector even if you are not upgrading any other component in your environment.



Note: If your on-premises environment already has badge users who are also VST client users, you must link the external user profile to the native user profile in the Vocera Secure Texting Administration Console to avoid ambiguity in message delivery, even if you do not upgrade your on-premises solution. See [Linking Badge Users to VST Profiles](#) on page 120.

- [Upgrading the Connector Only](#) on page 59
- [Upgrading a VS-Only \(No VMP\) Integration to VS 5.2](#) on page 61
- [Upgrading a VS-VMP Integration to VMP 5.2](#) on page 63
- [Upgrading a VS-VMP Integration to VS 5.2 and VMP 5.2](#) on page 64



Upgrading the Connector Only

Over time, you may need to upgrade the Vocera Secure Texting Sync Connector or completely uninstall it.

How To Uninstall the Connector

Use the steps in this topic to uninstall the Vocera Secure Texting Sync Connector software on the VS.

To uninstall the Vocera Secure Texting Sync Connector:

1. Log into the Vocera Voice Server computer with administrator privileges.
2. Stop the connector, if it is still running.
 - a. Display the Windows Services Control Panel.
Follow the steps provided in your Windows documentation.
 - b. Navigate to the Vocera Secure Texting Connector service.
 - c. Right-click the Vocera Secure Texting Connector service and choose Stop.
The Vocera Secure Texting Connector service stops, and its Status appears as blank.
3. Uninstall the connector.
 - a. Display the Windows Programs and Features Control Panel.
Follow the steps provided in your Windows documentation.
 - b. Navigate to the Vocera Secure Texting Connector application.
 - c. Right-click the Vocera Secure Texting Connector application and choose Uninstall.
The Vocera Secure Texting Connector application is removed from the list of programs.

The Vocera Secure Texting Sync Connector is successfully uninstalled.

How to Upgrade the VST Sync Connector on a Non-Clustered VS

Use the steps in this topic to upgrade the Vocera Secure Texting Sync Connector software on a non-clustered (stand-alone) Vocera Voice Server.

To upgrade the Vocera Secure Texting Sync Connector:

1. Uninstall the existing Vocera Secure Texting Sync Connector.
See [How To Uninstall the Connector](#) on page 59.
2. Install the appropriate version of the Vocera Secure Texting Sync Connector.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.

The Vocera Secure Texting Sync Connector is successfully upgraded.

How to Upgrade the VST Sync Connector on a Clustered VS

Use the steps in this topic to upgrade the Vocera Secure Texting Sync Connector software on a clustered Vocera Voice Server.

To upgrade the Vocera Secure Texting Sync Connector:

1. Uninstall the Vocera Secure Texting Sync Connector on the standby node.
See [How To Uninstall the Connector](#) on page 59.
2. Install the appropriate Vocera Secure Texting Sync Connector on the standby node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.
3. Fail over the cluster.
The original standby node becomes active, and the new Vocera Secure Texting Sync Connector makes a connection to the Vocera Secure Texting server. The original active node becomes the new standby.
See the Vocera Voice Server documentation for information on failing over a cluster.
4. Uninstall the Vocera Secure Texting Sync Connector on the new standby node.
See [How To Uninstall the Connector](#) on page 59.
5. Install the same version of the Vocera Secure Texting Sync Connector on the new standby node.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31.

The Vocera Secure Texting Sync Connector on the clustered Vocera Voice Server is successfully upgraded.



Upgrading a VS-Only (No VMP) Integration to VS 5.2

If you do not have VMP 5.2 in your on-premises environment, you must continue to use the Vocera Secure Texting Sync Connector and upgrade it. If you are using VMP 5.2, that product provides a connection to the VST cloud environment, and you no longer need to install a separate connector.

How to Upgrade a Stand-Alone (Non-Clustered) VS

If you do not have the Vocera Messaging Platform in your on-premises environment, use the steps in this topic to upgrade a stand-alone Vocera Voice Server to VS version 5.2.0.

Before you begin, your Vocera environment should include the following solutions:

- Existing non-clustered Vocera Voice Server version 5.1.0 or lower in the on-premises environment
- Vocera Secure Texting Sync Connector 3.0.x in the on-premises environment
- No existing Vocera Messaging Platform in the on-premises environment
- VST 2.3 server in the cloud environment

To upgrade a stand-alone server to VS 5.2.0:

1. Uninstall the existing Vocera Secure Texting Sync Connector.
See [How To Uninstall the Connector](#) on page 59.
2. Upgrade the Vocera Voice Server.
See the Vocera Voice Server Installation Guide.
3. Install the most recent version of the Vocera Secure Texting Sync Connector.
See the [VST Cloud Platform 2.3.0 release notes](#) to determine the most recent Vocera Secure Texting Sync Connector.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31 for information on installing the connector.
4. If any badge users are also VST client users, link the two user profiles.
See [Linking Badge Users to VST Profiles](#) on page 120.

Both the Vocera Secure Texting Sync Connector and the non-clustered Vocera Voice Server (with no VMP) are successfully upgraded and integrated with the VST 2.3.0 environment.

How to Upgrade a Clustered VS

If you do not have the Vocera Messaging Platform in your on-premises environment, use the steps in this topic to upgrade a clustered Vocera Voice Server to VS version 5.2.0.

Before you begin, your Vocera environment should include the following solutions:

- Existing clustered Vocera Voice Server version 5.1.0 or lower in the on-premises environment

- Vocera Secure Texting Sync Connector 3.0.x in the on-premises environment
- No existing Vocera Messaging Platform in the on-premises environment
- VST 2.3 server in the cloud environment

To upgrade a clustered Vocera Voice Server to VS 5.2.0:

1. Shut down the Vocera Voice Server on the standby node.
See the Vocera Voice Server documentation.
2. Uninstall the Vocera Secure Texting Sync Connector on the standby node.
See [How To Uninstall the Connector](#) on page 59.
3. Upgrade the Vocera Voice Server on the standby node.
See the Vocera Voice Server documentation.
4. Install the most recent version of the Vocera Secure Texting Sync Connector.
See the [VST Cloud Platform 2.3.0 release notes](#) to determine the most recent Vocera Secure Texting Sync Connector.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31 for information on installing the connector.
5. Fail over the cluster.
The original standby node becomes active, and the new Vocera Secure Texting Sync Connector makes a connection to the Vocera Secure Texting server. The original active node becomes the new standby.
See the Vocera Voice Server documentation for information on failing over a cluster.
6. Shut down the Vocera Voice Server on the new standby node.
See the Vocera Voice Server documentation.
7. Uninstall the Vocera Secure Texting Sync Connector on the new standby node.
See [How To Uninstall the Connector](#) on page 59.
8. Upgrade the Vocera Voice Server on the new standby node.
See the Vocera Voice Server documentation.
9. Install the most recent version of the Vocera Secure Texting Sync Connector.
See the [VST Cloud Platform 2.3.0 release notes](#) to determine the most recent Vocera Secure Texting Sync Connector.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31 for information on installing the connector.

Both the Vocera Secure Texting Sync Connector and the clustered Vocera Voice Server are successfully upgraded and integrated with the VST 2.3.0 environment.



Upgrading a VS-VMP Integration to VMP 5.2

If you are upgrading your on-premises environment to include VMP 5.2.0, you do not need to install a connector—the connection mechanism is built into VMP. You do, however, need to run **VSTSetup-VS-VMP.exe** on the VS to install the **vst.war** file that allows VST to sync users from the **VSTContacts** group to the VST server.

How to Upgrade VMP to Version 5.2.0

If you have both the Vocera Messaging Platform and the VST in your on-premises environment, use the steps in this topic if you want to upgrade the Vocera Messaging Platform to version 5.2.0.

Before you begin, your Vocera environment should include the following solutions:

- Existing non-clustered Vocera Voice Server version 5.1.0 or lower in the on-premises environment
- Vocera Secure Texting Sync Connector 3.0.x in the on-premises environment
- Existing Vocera Messaging Platform version 5.1.0 or lower in the on-premises environment
- VST 2.3 server in the cloud environment

To upgrade your VMP solution to version 5.2.0 without upgrading your VS solution:

1. Uninstall the existing Vocera Secure Texting Sync Connector.
See [How To Uninstall the Connector](#) on page 59.
2. Install the most recent version of the Vocera Secure Texting Sync Connector.
See the [VST Cloud Platform 2.3.0 release notes](#) to determine the most recent Vocera Secure Texting Sync Connector.
See [How to Install the VST Sync Connector on a Non-Clustered VS](#) on page 31 for information on installing the connector.
3. Upgrade the Vocera Messaging Platform.
See the Vocera Messaging Platform Administration Guide.
4. Configure the connector on the Vocera Messaging Platform.
See [How to Connect the On-Premises Solution to VST](#) on page 19.
5. If any badge users are also VST client users, link the two user profiles.
See [Linking Badge Users to VST Profiles](#) on page 120.

Both the Vocera Secure Texting Sync Connector and the clustered Vocera Messaging Platform are successfully upgraded and integrated with the VST 2.3.0 environment.



Upgrading a VS-VMP Integration to VS 5.2 and VMP 5.2

If you are upgrading your on-premises environment to include both VS 5.2.0 and VMP 5.2.0, you do not need to install a connector or any other on-premises components. The connection mechanism is built into VMP and the user syncing capabilities required by VST are built into the Vocera Voice Server.

How to Upgrade Both the VS and the VMP to Version 5.2.0

If you have both the Vocera Messaging Platform and the VST in your on-premises environment, use the steps in this topic if you want to upgrade both products Vocera Messaging Platform to version 5.2.0.

Before you begin, your Vocera environment should include the following solutions:

- Existing non-clustered Vocera Voice Server version 5.1.0 or lower in the on-premises environment
- Vocera Secure Texting Sync Connector 3.0.x in the on-premises environment
- Existing Vocera Messaging Platform version 5.1.0 or lower in the on-premises environment
- VST 2.3 server in the cloud environment

To upgrade both your VMP and VS solutions to version 5.2.0:

1. Uninstall the existing Vocera Secure Texting Sync Connector.
See [How To Uninstall the Connector](#) on page 59.
2. Upgrade the Vocera Voice Server.
See the Vocera Voice Server Installation Guide.
3. Upgrade the Vocera Messaging Platform.
See the Vocera Messaging Platform Administration Guide.
4. Configure the connector on the Vocera Messaging Platform.
See [How to Connect the On-Premises Solution to VST](#) on page 19.
5. If any badge users are also VST client users, link the two user profiles.
See [Linking Badge Users to VST Profiles](#) on page 120.

Both the Vocera Secure Texting Sync Connector and the clustered Vocera Messaging Platform are successfully upgraded and integrated with the VST 2.3.0 environment.

Administering the Vocera Secure Texting Solution

- [Working with Organizations](#) on page 66
- [Working with Practices](#) on page 73
- [Working with Groups](#) on page 87
- [Working with Users](#) on page 95



Working with Organizations

In VST, an organization represents a hospital or a practice. It is a top-level structure that may contain both groups and users.

About Organizations and Communities

In VST, an *organization* is a generic term that is used to reference either a hospital or a practice. A *hospital* is a VST organization that has its own on-premises Vocera system; a *practice* is an organization that does not have an on-premises Vocera system.

Members of one organization may communicate with members of another if the two organizations are affiliated with each other. Organizations become affiliates when the administrator of one organization sends the other an invitation, and the administrator of the second organization accepts the invitation.

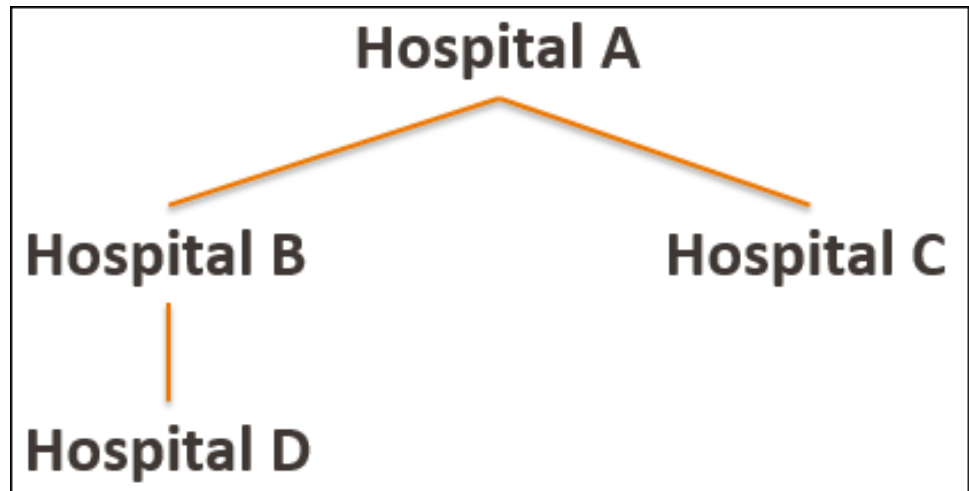
Only a Vocera employee may create a hospital. If your organization has an on-premises Vocera system and you want to have the messaging capabilities of VST, contact Vocera technical support for more information. Administrators of a hospital may both create a practice if it does not exist and also invite existing hospitals and practices to communicate with them. Administrators of a practice may send an invitation to an existing hospital or practice, but they may not create a practice.

Finally, organizations that are not directly connected with each other but are affiliates of the same hospital may also communicate, because they are members of that hospital's *community*. VST treats organizations within the same community as affiliates, allowing their users to communicate with each other. The rest of this section describes communities and the ways they communicate in greater detail.

Communities with Hospitals

Hospitals have a *community* that extends to one level of affiliated organizations. Users who are members of any hospital or practice within the community are permitted to contact each other. Organizations that are indirect affiliates within a hospital's community have the same permissions that they share with the parent hospital.

For example, suppose Hospital A is affiliated with both Hospital B and Hospital C. Hospitals B and C are both in the community of Hospital A, so their users are able to communicate with each other as well as with users of Hospital A.

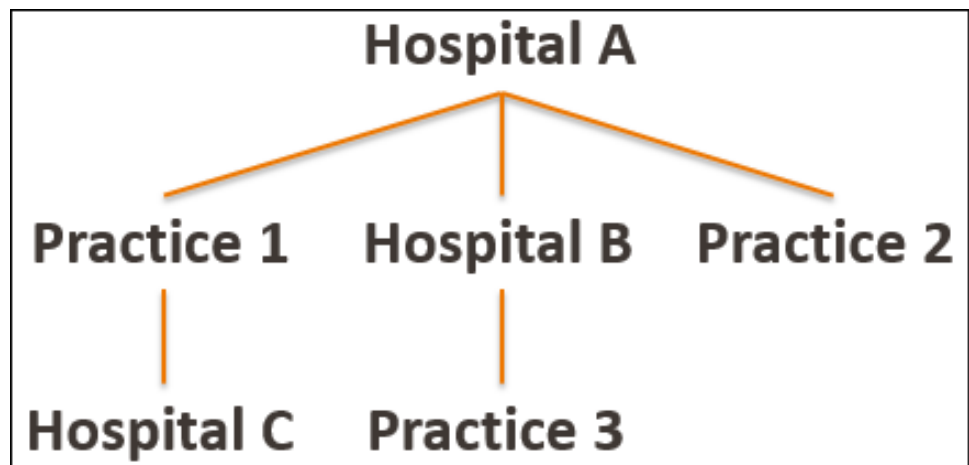


In addition, suppose Hospital D is an affiliate of Hospital B. In this situation, Hospitals A and D are both in the community of Hospital B, so their users are able to communicate with each other as well as with users of Hospital B. However, users in Hospital D and Hospital C are not able to communicate with each other, because those two hospitals are not in the same community. Hospital A's community extends only to one level, and Hospital D is two levels removed from Hospital A.

Communities with Practices and Hospitals

Practices may be members of a hospital's community, but unlike hospitals, practices are unable to provide their own communities.

For example, suppose Hospital A is affiliated with Practice 1, Hospital B, and Practice 2. Users in all these organizations are able to communicate with each other because they are all in community of Hospital A.



In addition, suppose Hospital C is an affiliate of Practice 1. In this situation, users in Hospitals A and C are not able to communicate because the two hospitals are only connected through Practice 1, and practices do not provide their own communities.

If Hospital B is affiliated with Practice 3, users in Hospital A and Practice 3 are both in the community of Hospital B, and so their users are able to communicate with each other as well as with users of Hospital B. However, users in Practice 3 and Practice 2 are not able to communicate with each other because those two practices are not in the same community. Hospital A's community extends only to one level, and Practice 3 is two levels removed from Hospital A.

Updating an Organization

When you update an organization you are providing information that controls the ability of its members to communicate with each other and with affiliated organizations. After an organization is created, you must update it to specify its members and its affiliated organizations.

About Message Expiration and Retention

The organization administrator may specify both a message expiration time and a message retention value. These values are specified independently, but they interact with each other if the message retention period is shorter than the message expiration time.

The [Update Organization](#) page of the VST Administration Console allows you to specify both message expiration and retention values. See [How to Update your Own Organization](#) on page 69.

Message Expiration

The [Message Expiration Time](#) setting controls the duration of time that messages are visible on the VST clients.

Individual messages have a default expiration time (typically 7 days, but it can range between 30 minutes and 30 days) that is specified by the hospital administrator. Messages that expire are removed from the VST client, but they are retained in the database of the VST server for the duration of the message retention period.

Messages in a conversation expire one-by-one. If the initial message in a conversation reaches its expiration date but the most recent message is current, the initial message is removed from all clients but the unexpired messages remain. Because organization administrators may customize their message expiration setting, each organization may specify a different message duration. If the recipients of a message span multiple organizations, VST honors the message duration setting of the sending organization.

The *message retention* period is set for an entire organization, and it determines the amount of time messages persist in the VST database. By default, messages are never purged from the VST database, but organizations may customize this behavior.

If the message retention period is shorter than the message expiration time, the message is both expired (on the client) and purged (in the database). In this situation, messages are removed from the handheld client when the app is placed in the background and then opened in the foreground; message are removed from the VST Web Client when the screen refreshes.

Message Retention

The [Message retention period](#) setting specifies the duration of time that message content is preserved on the VST server before being purged. The purge mechanism preserves the message metadata (such as subject and recipient list) but removes message content permanently; message content cannot be recovered once the purge has occurred.

The message retention period determines how long message content persists in the VST database. Message retention is a security feature that allows an organization to remove potentially sensitive message content on a regular schedule. In many cases this is not necessary, because the message expiration setting will remove messages from the clients. By default, the message retention period is null and messages are preserved indefinitely.

When a message reaches the end of its retention period, it is purged from the VST database at the time the next scheduled purge mechanism runs (currently once per day at 2:00 AM Eastern Time). By default, the message retention period is null, and messages are never purged.

The message retention period for a practice or hospital is determined by the organization's administrator. When users of two or more organizations are engaged in a conversation, the retention period for all messages in the conversation is determined by the message retention period of the organization that initiated the conversation.

How to Update your Own Organization

When you first login to the Vocera Secure Texting Administration Console, the system displays the Update Organization page for the organization you administer. This page is the starting point for all your administrative activity. You can manage the membership of your organization, invite affiliated practices to communicate with you, and create groups to provide more granular control of communication permissions.

To update your own organization:

1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

The Update Organization page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization
No

Allow messages to non-users via email and SMS
Yes

Message retention period
Years

Message Expiration Time
2 Weeks

High Priority Notification Sound Length
5 Seconds

Cancel Save

VST Administrators

Blair, Steve
Davis, Miles

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

2. If necessary, change any of the basic information about the organization in the Organization Details section and click Save.

The basic information is updated and saved.

3. Use the [VST Administrators](#) section to locate other administrators quickly and send them email messages, if necessary.
4. Use the [Members](#) section to add new members to the organization or update the status of existing members.
See [Inviting Users](#) on page 100 and [Creating Users](#) on page 107 for information about adding new members to the organization.
5. Use the [Organizations with whom we can communicate](#) section to manage communication between your own organization and your affiliates:
 - a. Use the [Permissions](#) link next to an organization to specify a limited group of users in your organization who are able to communicate with the affiliate.
See [Working with Groups](#) on page 87 for information about using groups to control which users in your organization are able to communicate with an affiliate.
 - b. Use the [Invite Existing Organization](#) button to invite organizations that already exist in the system to communicate with your users.
See [How to Invite an Existing Practice to Join an Organization](#) on page 76 for information about updating your list of affiliated organizations.
 - c. Use the [Create Practice](#) button to create a practice for an affiliated organization that will communicate with your users.
See [How to Create a Practice](#) on page 73 for information about creating a new practice.
6. Use the [Sub groups](#) section to create groups that you can use to limit which users in your organization can communicate with affiliates.
See [How to Create Groups in the Administration Console](#) on page 87.

Update Organization Page Reference

Update an existing organization, manage its members and licenses, and control its ability to communicate with other organizations by entering information on the [Update Organization](#) page.

Table 16: Organization Details

Field	Description
Group name	Specify a name for the group using any combination of letters and numbers.
Office number	Enter the main contact number for the organization, optionally using parentheses and dashes for formatting. A third-party provider used by Vocera assigns a <i>Voice Number</i> based on the area code that you entered. If the <i>Office Number</i> has a toll-free area code, a <i>Voice Number</i> is not created. In this situation, use a conventional area code for the <i>Office Number</i> , save the organization, and let the third-party provider assign a number in that area code. Then change the <i>Office Number</i> to use the toll-free area code and save the organization again.
Voice number	The phone number that allows users to place calls from the Vocera Secure Texting app, provided by a third-party service. This number is provided automatically when you create an organization, and it is not editable.
Default time zone	Specify a default time zone for the organization. The time zone is used for the time stamp of messages that are sent by members of the organization.
Members can send messages to whole organization	Specify whether members of this organization are allowed to send messages to the entire organization.
Message expiration time	Specify the amount of time that messages to members of this organization persist on the client. Messages that expire are removed from the VST client, but they are retained in the database of the VST server for the duration of the message retention period. By default, message expiration time is seven days.

Field	Description
Allow messages to non-users via email and SMS	When set to yes, users may send messages to people outside their organization by specifying their email address or phone number. In addition, personal contacts from the user's mobile device appear in the VST client Contacts list. Changes to this setting take effect after approximately 30 minutes and require the user to switch tabs in the application.
High priority notification sound length	Specify the duration of the tone that is played for high priority messages. By default, the duration is 30 seconds.
Message retention period	Specify the amount of time that message content persists in the VST cloud database. When the retention period is reached, message content is purged and cannot be recovered. By default, the message retention period is null, and message content is never purged.

Table 17: VST Administrators

Field	Description
User Name	The name of each user who is an administrator of the organization. Click to edit the User Profile.
Send Email	Uses your computer's default email client to open a new email message addressed to the organization administrator.

Table 18: Members

Field	Description
User Name	The name of each user who is a member of the organization. Click to edit the User Profile.
Status	One of Available, Busy, Not Available, or None. By default, the status is Available.
Create User	Opens the Create User Profile page and lets you manually create a user.
Invite	Opens the Invite Users page and lets you send invitations to multiple individuals. The system creates users when the individuals accept the invitations.

Table 19: Organizations with whom we can communicate

Field	Description
Organization Name	The names of organizations you have invited to communicate with your users.
Delete	Removes the organization from the list of organizations who can communicate with your users. Does not delete the organization from the system.
Permissions	Displays the Association Permissions page, which allows you to limit the number of users in your organization who are able to communicate with the affiliated organization.
Invite Existing Organization	Invites another organization to communicate with your users. The organization appears as pending until the invitation is accepted.
Create Practice	Opens the Create Practice page and lets you create a new organization and invite it to communicate with your users.

Table 20: Sub groups

Field	Description
Search	Optionally enter all or part of the name of a group to filter the list of group names.
Go	Click to filter the list of group names based on the value in the Search field.
Group Name	Displays the names of groups that currently exist within your organization.

Field	Description
Edit	Displays the Update Group page, which allows you to edit the name, members, and properties of the group.
Create New Group	Opens the Create Group page, where you can create a new group of users within your organization.



Working with Practices

In the Vocera Secure Texting application, a *practice* is an organization that does not have an on-premises Vocera system. Practices can invite and manage their own users, communicate with affiliated organizations, and invite other organizations to communicate with them. A practice cannot create another organization; it can affiliate only with organizations that are already in the Vocera Secure Texting system.

Creating a Practice

VST provides additional value when other organizations you are affiliated with are also using it. Not only can the members of an affiliate communicate with each other in a secure manner, they can also communicate with the members of your own organization. Each new practice must be associated with at least one hospital. A hospital administrator can create a practice for one of their affiliated organizations, or a Vocera administrator can create a practice on behalf of a hospital administrator. You can create an unlimited number of practices.

How to Create a Practice

If any of your affiliated organizations are not using VST, you can create the organization as a practice, designate a new user as its administrator, and invite the administrator to join.

To create a new practice:

1. If you are not on the [Update Organization](#) page, navigate to it by selecting [Admin > Edit Organization](#) from the menu at the top right of any page.
The [Update Organization](#) page appears.

vocera Abelard Medical Center Admin Tools Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group ID
69

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number ?
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization ?
No

Allow messages to non-users via email and SMS ?
Yes

Message Expiration Time ?
2 Weeks

High Priority Notification Sound Length ?
5 Seconds

[Cancel](#) [Save](#)

VST Administrators

[Blair, Steve](#)

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

[Create User...](#) [Invite...](#)

[Upgrade 8 users to Premium](#)

Organizations with whom we can communicate ?

St Nicholas Pediatric Center	No License	Delete	Permissions
St. Dominic's Urgent Care	No License	Delete	Permissions

[Invite Existing Organization/Practice](#) [Create Practice](#)

- In the Organizations with whom we can communicate section, click Create Practice. The Create Practice page appears.

Practice Details

Practice Name Required Office number Required

Practice VST Administrator

First Name Required Last Name Required

Email Address Required

Initial Licensed Users

License
None

Initial Standard Users

Email addresses (separated by spaces or carriage returns)

...or select CSV file containing email addresses ([Download Sample CSV File](#))
Choose File No file chosen

Cancel Submit

- Complete the information as described in [Create Practice Page Reference](#) on page 75 and click **Submit**.

The system creates the practice and displays the [Update Organization](#) page with a banner message stating that the new practice was created.

After you create the practice, the person you designated as its administrator automatically receives an email invitation to join VST and become the administrator of the practice. The administration account is not associated with the practice until the user registers by accepting the invitation. After accepting the invitation, the administrator can update basic information about the practice, add other users to the practice, and limit the groups of users who can communicate. See [How to Update your Own Organization](#) on page 69.

Create Practice Page Reference

The [Create Practice](#) page allows you to specify basic information about the practice and then save it.

Table 21: Practice Details

Field	Description
Practice Name	The name of the affiliated organization.

Field	Description
Office Number	Enter the main contact number for the organization, optionally using parentheses and dashes for formatting. A third-party provider used by Vocera assigns a <i>Voice Number</i> based on the area code that you entered. If the <i>Office Number</i> has a toll-free area code, a <i>Voice Number</i> is not created. In this situation, use a conventional area code for the <i>Office Number</i> , save the organization, and let the third-party provider assign a number in that area code. The Practice Administrator can then optionally update the <i>Office Number</i> to use the toll-free area code and save the organization again.

Table 22: Practice VST Administrator

Field	Description
First Name	The first name (given name) of the person who administers the affiliated organization.
Last Name	The last name (family name) of the person who administers the affiliated organization.
Email Address	The email address of the person who administers the affiliated organization. You must specify the email address of a new, unregistered user.

Table 23: Initial Standard Users

Field	Description
Email Addresses	Enter a list of email addresses for the users you want to invite, separating them with spaces or carriage returns.
Download Sample CSV	Opens Windows Explorer and lets you navigate to a directory where you can download a sample CSV file showing the proper formatting for a bulk invitation of users.
Choose File	Opens Windows Explorer and lets you navigate to CSV file specifying the email addresses and names of users to upload.

Inviting a Practice

If an organization already exists in the VST system, you can invite its members to communicate with the members of your own organization by sending its VST administrator a request. When the administrator accepts the request, members of your organization and members of the affiliate can communicate with each other.

How to Invite an Existing Practice to Join an Organization

Send another practice administrator an email that invites the members of that practice to begin communicating with your members.

To send an invitation to a practice administrator:

1. If you are not on the *Update Organization* page, navigate to it by selecting *Admin > Edit Organization* from the menu at the top right of any page.
The *Update Organization* page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number Required
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization Required
No

Allow messages to non-users via email and SMS Required
Yes

Message retention period Required
Years

Message Expiration Time Required
2 Weeks

High Priority Notification Sound Length Required
5 Seconds

Cancel Save

VST Administrators

Blair, Steve ✕
Davis, Miles ✕

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

- In the Organizations with whom we can communicate section, click Invite Existing Organization.

The Invite Organization dialog box appears.

Invite Organization

Enter the name of the organization to invite. The organization must already be signed up for Vocera Secure Texting. Matches will appear below as you type. Click on the one you want to invite, then click the Invite button.

If there is already a pending invitation for the same organization, it will be replaced.

Organization Name

Invite

- Begin typing the name of the organization, and the screen displays a list of possible matches to choose from.
- Select the organization and click Invite.

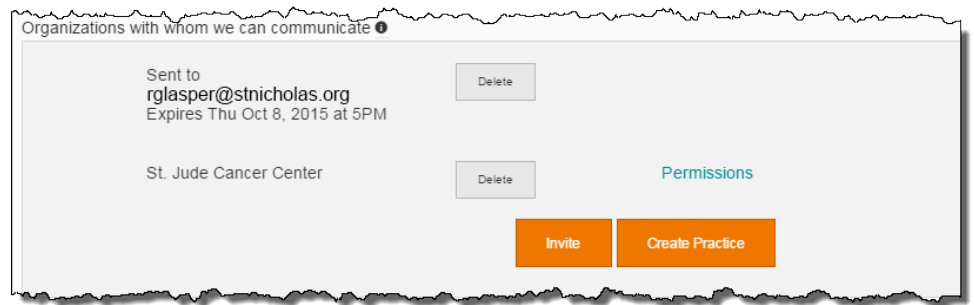
The system displays a Success message indicating that the invitation was sent successfully.

Success

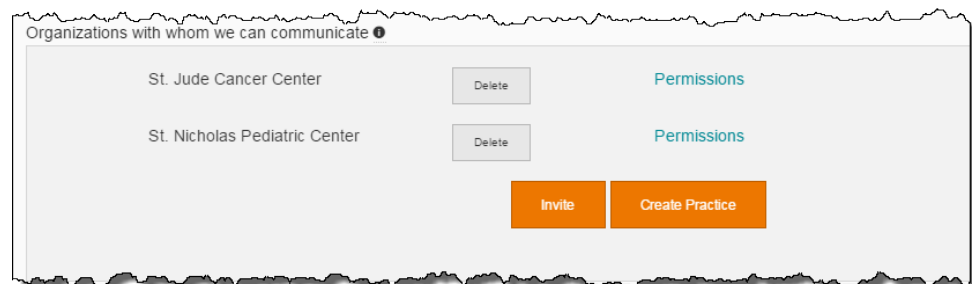
Invitations have been sent to the Vocera Secure Texting administrators for St. Nicholas Pediatric Center.

5. Close the **Success** message.

The email address of the invited practice administrator appears in the list of **Organizations with whom we can communicate** section.



After the practice administrator accepts the invitation, the name of the practice replaces the email address of its administrator in the list of **Organizations with whom we can communicate**. See [Responding to Invitations](#) on page 78 for information about accepting invitations.



Similarly, your organization appears in the **Organizations with whom we can communicate** list in the practice administrator's Vocera Secure Texting Administration Console.

Members of the two organizations are now able to communicate with each other, and they appear as contacts in each other's VST clients. You can use the **Permissions** link to specify groups of users who can communicate with other practices and to exclude other users from communicating. See [How to Limit Communication with an Affiliate](#) on page 81.

Responding to Invitations

As a VST administrator, you will not only invite your affiliates to communicate with you, you will also respond to invitations from affiliates to communicate with them. When you respond to an invitation, you can allow all your members to communicate with an affiliate, or you can restrict the communication permission to a smaller group of members.

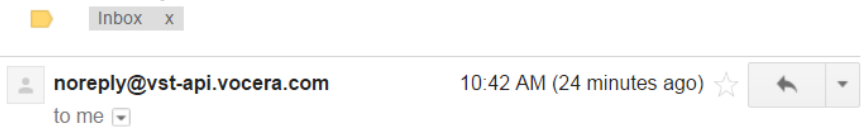
How to Accept an Invitation for All Users

Affiliated organizations may invite members of your practice to communicate with members of the affiliate. In this situation, you will receive an email invitation from your affiliate. When you respond, you can allow all members of your organization to communicate with the affiliate, or allow only a subset of your members to communicate.

To accept an invitation and allow all your members to communicate with an affiliate:

1. Open the invitation email you received.

Invitation to join Addison Medical Center's VST network



Steve Blair with Addison Medical Center has invited your organization to join their VST network. This will allow all their users to communicate with your organization.

If you are one of your organization's Vocera Secure Texting administrators, click [here](#) to accept or navigate a web browser to:

<https://test-vst-admin.vocera.com/s/org/0/associations/674/invite?token=LFEjVeV7qAdTgB318TevYw>

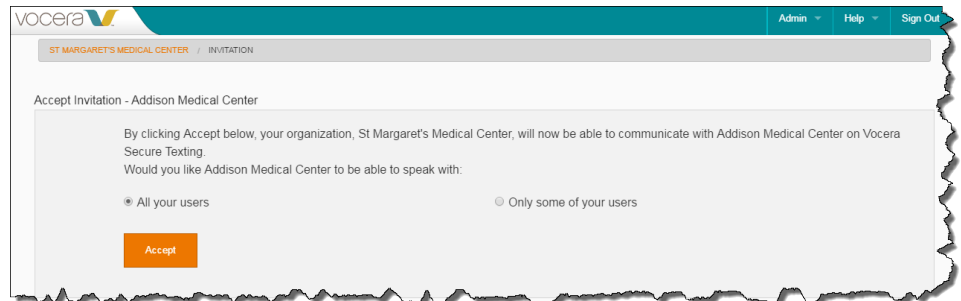
This link will expire on Sunday, Oct 16 2016 at 11:00 AM PDT.

If your organization uses Vocera Secure Texting but you are not an administrator, please forward this e-mail to one of your organization's Vocera Secure Texting

- Click the link in the invitation email as directed.

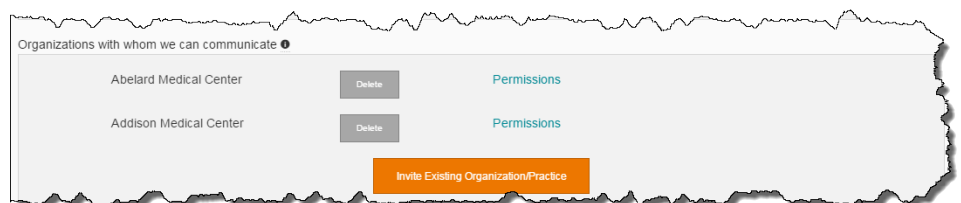
If you are not logged into the Vocera Secure Texting Administration Console, the Login page appears. Log in as described at [How to Log Into the VST Administration Console](#) on page 12.

The Invitation page appears.



- Select All your users to allow all your users to communicate with the affiliated organization.
- Click Accept.

The organization appears in the Organizations with whom we can communicate list on the Update Organization page.



Similarly, your organization appears in the Organizations with whom we can communicate list in the inviting organization's Vocera Secure Texting Administration Console.

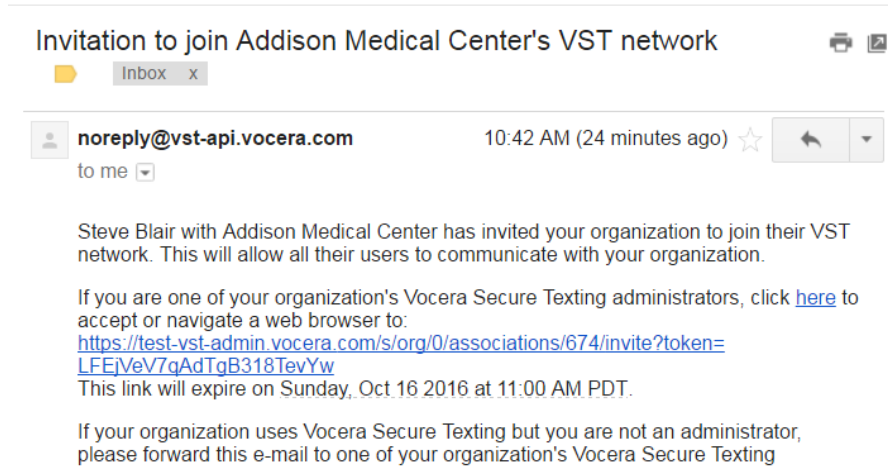
At this time, members of two organizations can communicate with each other, and they appear as contacts in each other's VST clients.

How to Accept an Invitation for Some Users

Affiliated organizations may invite members of your practice to communicate with members of the affiliate. In this situation, you will receive an email invitation from your affiliate. When you respond, you can allow all members of your organization to communicate with the affiliate, or allow only a subset of your members to communicate.

To accept an invitation and allow only some of your members to communicate with an affiliate:

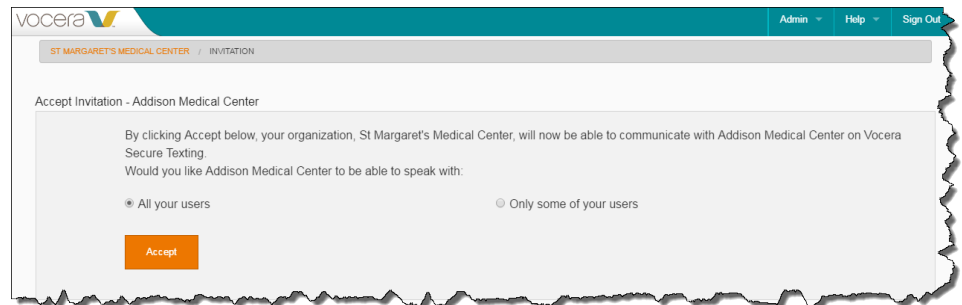
1. Open the invitation email you received.



2. Click the link in the invitation email as directed.

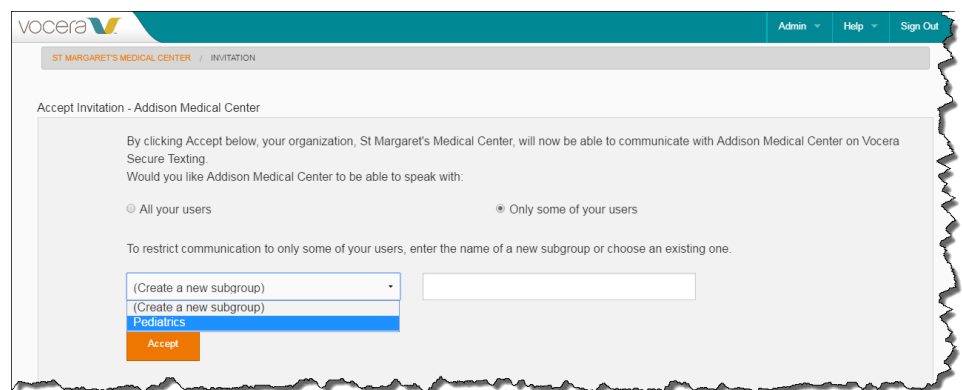
If you are not logged into the Vocera Secure Texting Administration Console, the Login page appears. Log in as described at [How to Log Into the VST Administration Console](#) on page 12.

The Invitation page appears.



3. Select **Only some of your users** to allow a subset of your users to communicate with the affiliated organization.

The page displays new fields and prompts you to specify an existing group or create a new one.



4. Do either of the following:
 - Click the arrow next to **Create a new subgroup**, choose an existing group from the list, and click **Accept**.
 - Enter the name of the group and click **Accept**.

The Update Group page appears.

ST MARGARET'S MEDICAL CENTER / PEDIATRICS

You can now add members by clicking 'Add Members' button below

Update Group

Group Details

Group name Required
Pediatrics

Secure Message Options
Members can send messages to whole group ●
No

Cancel Save

Members (0)

Remove Selected Add...

5. Add users who need to communicate with the affiliate to the group. See [How to Manage Membership in a Group](#) on page 93.
6. When you are finished adding members to the group, click **Save** on the Update Group page.
7. Use the menus and choose **Admin > Organizations**.

The organization appears in the Organizations with whom we can communicate list on the Update Organization page.

Organizations with whom we can communicate ●

Abelard Medical Center	Delete	Permissions
Addison Medical Center	Delete	Permissions

Invite Existing Organization/Practice

Similarly, your organization appears in the Organizations with whom we can communicate list in the inviting organization's Vocera Secure Texting Administration Console.

At this time, members of two organizations can communicate with each other, and they appear as contacts in each other's VST clients.

How to Limit Communication with an Affiliate

By default, all members of your practice have permission to communicate with the organization who invited them. If you desire, you can restrict the communication permission to a smaller group of members instead of assigning it to all organization members.

To limit the members of your organization who can communication with an affiliate:

1. If you are not on the Update Organization page, navigate to it by selecting **Admin > Edit Organization** from the menu at the top right of any page.

The Update Organization page appears.

Update Organization

Organization Details

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number Required
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization Required
No

Allow messages to non-users via email and SMS Required
Yes

Message retention period Required
Years

Message Expiration Time Required
2 Weeks

High Priority Notification Sound Length Required
5 Seconds

Cancel Save

VST Administrators

Blair, Steve ✕
Davis, Miles ✕

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

- In the Organizations with whom we can communicate section, click the Permissions link next to an organization that only some of your members should be able to communicate with. The Association Permissions page appears.

Association Permissions

Edit which groups can communicate with St. Thomas Cardiology Center

☐ None

☒ Abelard Medical Center [Edit](#)

☐ Birthing Center [Edit](#)

☐ Emergency Department [Edit](#)

☐ PICU [Edit](#)

Save

- Select the group of members who require the permission to communicate with this affiliate. For example, in the above illustration, Birthing Center, Emergency Department, and PICU are all groups of Abelard Medical Center members.
 - If you do not see any groups or if the appropriate group does not exist, you need to create it. See [How to Create Groups in the Administration Console](#) on page 87.

- If you need to review the membership in any of the groups, click the [Edit](#) link next to it to display the [Update Group](#) page.
4. Click [Save](#).
The system displays a teal banner stating "Permissions updated successfully".

Association Permissions Page Reference

The [Association Permissions](#) page allows you to limit the number of users in your organization who are able to communicate with the affiliated organization.

Table 24: Edit Permissions for Association

Field	Description
None	When selected, specifies that no-one in your organization is permitted to communicate with the affiliated organization.
Organization Name	When selected, specifies that everyone in your organization is permitted to communicate with the affiliated organization.
Group Name	When selected, specifies that only members of this group are permitted to communicate with the affiliated organization.

Ending Communication with an Affiliate

If necessary for any reason, you can end communication with an affiliate that you have already been communicating with. When you end communication temporarily, the organization remains an affiliate but no members have permission to communicate; when you end communication permanently, the organization is removed from your list of affiliates and must be re-invited before communication can begin again.

How to End Communication with a Practice Temporarily

After you have invited an affiliate to communicate with your own members, in some situations you may want to temporarily revoke that permission and stop allowing the affiliate to contact your members.

To temporarily stop members of another organization from contacting your own members:

1. If you are not on the [Update Organization](#) page, navigate to it by selecting [Admin](#) > [Edit Organization](#) from the menu at the top right of any page.
The [Update Organization](#) page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number Required
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization Required
No

Allow messages to non-users via email and SMS Required
Yes

Message retention period Required
Years

Message Expiration Time Required
2 Weeks

High Priority Notification Sound Length Required
5 Seconds

Cancel Save

VST Administrators

Blair, Steve ✕
Davis, Miles ✕

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

- In the Organizations with whom we can communicate section, click the Permissions link to the right of the organization name.

The Association Permissions page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER / ASSOCIATION PERMISSIONS

Edit which groups can communicate with St. Thomas Cardiology Center

☐ None

☒ Abelard Medical Center [Edit](#)

☐ Birthing Center [Edit](#)

☐ Emergency Department [Edit](#)

☐ PICU [Edit](#)

Save

- Select None, and then choose Save.

The Association Permissions page displays a banner message stating that the permissions have been updated.

How to End Communication with a Practice Permanently

After you have invited an affiliate to communicate with your own members, in some situations you may want to revoke that permission and stop allowing the affiliate to contact your members.

To permanently stop members of another organization from contacting your own members:

1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

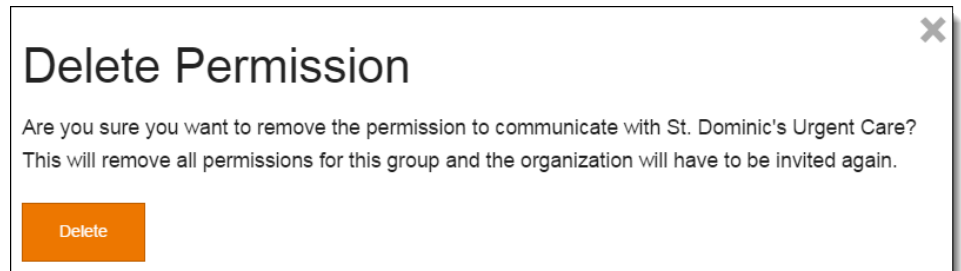
The Update Organization page appears.

The screenshot shows the 'Update Organization' page for 'ABELARD MEDICAL CENTER'. The page has a teal header with 'vocera' logo and navigation links for 'Admin', 'Help', and 'Sign Out'. The main content area is divided into several sections:

- Organization Details:** Contains fields for 'Group name' (Abelard Medical Center), 'Office number' ((408) 882-5830), 'Voice number' ((408) 837-0043), and 'Default time zone' (US/Pacific).
- Secure Message Options:** Includes checkboxes for 'Members can send messages to whole organization' (No) and 'Allow messages to non-users via email and SMS' (Yes). It also has dropdowns for 'Message Expiration Time' (2 Weeks), 'High Priority Notification Sound Length' (5 Seconds), and 'Message retention period' (Years).
- VST Administrators:** Lists 'Blair, Steve' and 'Davis, Miles' with email icons.
- Members (14):** A list of members with their names and status: Blair, Steve (Available), Bley, Carla (Available), Brown, Charlie (None), Brown, Sally (Available), Davis, Miles (Available), and Marie, Rose (Available). Below the list are pagination controls showing '1' of 2 pages and two buttons: 'Create User...' and 'Invite...'.

2. In the Organizations with whom we can communicate section, click the Delete button to the right of the organization name.

The Delete Permission dialog box appears.



3. Click Delete.

The Delete Permission dialog box closes, and the practice is removed from the list in the Organizations who can communicate with my users section.



Working with Groups

A group is a subset of users in your organization. You can use groups as contacts, allowing members of your organization to send messages to a subset of other members at the same time. Groups also provide permissions, allowing you to limit the users in your organization who can communicate with an affiliate. Members of your organization can belong to any number of groups at the same time.

Creating Groups

You can either create groups by using the VST Administration Console interactively or by importing them in a spreadsheet. A spreadsheet allows you to create multiple groups at the same time, but you still must use the VST Administration Console to assign members to them.

How to Create Groups in the Administration Console

When you create groups interactively in the Administration Console, you can add members and specify permissions at the time you create the group. However, you can create only one group at a time.

To create a group in the Administration Console:

1. If you are not on the [Update Organization](#) page, navigate to it by selecting [Admin > Edit Organization](#) from the menu at the top right of any page.
The [Update Organization](#) page appears.

Update Organization

Organization Details

Group name Required
Abelard Medical Center

Office number Required
(408) 882-5830

Voice number
(408) 837-0043

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization
No

Allow messages to non-users via email and SMS
Yes

Message retention period
Years

Message Expiration Time
2 Weeks

High Priority Notification Sound Length
5 Seconds

Cancel Save

VST Administrators

Blair, Steve
Davis, Miles

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

- In the Sub groups section, click **Create New Group**.
The **Create Group** page appears.

Create Group

Group Details

Group name Required

Secure Message Options

Members can send messages to whole group
No

Cancel Save

- Enter the group details as described in [Create Group Page Reference](#) on page 89 and click **Save**.
The group is created and the **Update Group** page appears.

Vocera

Admin Help Sign Out

ABELARD MEDICAL CENTER / PHYSICAL THERAPY

Update Group

Group Details

Group name Required

Physical Therapy

Secure Message Options

Members can send messages to whole group

No

Cancel Save

Members (0)

Remove Selected Add

After you create a group, click the **Add** button and update its membership as described in [How to Manage Membership in a Group](#) on page 93. You can also set permissions to restrict communication with other organizations. See [How to Limit Communication with an Affiliate](#) on page 81.

Create Group Page Reference

The **Create Group** page allows you to create smaller groups of users within your organization. You can use these groups as contacts for sending messages and also for specifying permissions.

Table 25: Group Details

Field	Description
Group Name	The name of the group, specified using any combination of letters and numbers.
Members allowed to send messages to whole group	Specifies whether members of the parent organization are allowed to send messages to this group. If you set this value to Yes , the group appears as a contact for each member of the organization. If you set this value to No , the group does not appear as a contact; it is used to assign permissions only. This field is disabled until the group has members.

How to Create Groups by Importing a Spreadsheet

When you create groups by importing them from a spreadsheet, you can create any number at the same time. However, you must use the VST Administration Console to assign members to them.

To create groups with a spreadsheet import:

1. If you are not on the **Update Organization** page, navigate to it by selecting **Admin > Edit Organization** from the menu at the top right of any page.

The **Update Organization** page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required

Office number Required

Voice number Required

Default time zone

Secure Message Options

Members can send messages to whole organization Required

Allow messages to non-users via email and SMS Required

Message retention period Required
 Years

Message Expiration Time Required

High Priority Notification Sound Length Required

VST Administrators

Blair, Steve

Davis, Miles

Members (14)

Blair, Steve	Status:	Available
Bley, Carla	Status:	Available
Brown, Charlie	Status:	None
Brown, Sally	Status:	Available
Davis, Miles	Status:	Available
Marie, Rose	Status:	Available

« 1 2 »

- In the Members section, click the Invite button.
The Invite Users page appears.

vocera

Admin Help Sign Out

ABELARD MEDICAL CENTER / INVITE USERS

USERS: Find Create **Invite Users** Invitations

This page lets you invite users into your Vocera Secure Texting organization.

Use the CSV option to pre-populate fields such as name and department. Any departments listed will be automatically created as groups within your organization if they don't already exist.

Use the Email Addresses option to specify a simple list of email addresses.

Each recipient will receive an invitation via email. The message will contain a link which will let them register for a VST profile. When they sign up, they will be automatically added to your organization.

Upload CSV File
 No file chosen
[Download sample CSV file](#)

Email Addresses Separated By Spaces Or Carriage Returns

3. Download the sample file and use it as a template. Values in the Department field of the template are required and are imported as group names. Values in the other fields are optional and for your reference only.
4. Click [Choose File](#) and navigate to a file containing a list of group names in CSV (comma-separated value) format.
5. Select [Invite](#).

The system creates groups for each of the values in the [Department](#) column.

If any email addresses are included in the spreadsheet, invitations are sent to those users but they are not automatically associated with any groups.

How to Update a Group

You can modify the membership of a group or change its details any time after the group is created.

To update a group:

1. If you are not on the [Update Organization](#) page, navigate to it by selecting [Admin](#) > [Edit Organization](#) from the menu at the top right of any page.

The [Update Organization](#) page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required

Office number Required

Voice number Required

Default time zone

Secure Message Options

Members can send messages to whole organization Required

Allow messages to non-users via email and SMS Required



Message retention period Required
 Years

Message Expiration Time Required

High Priority Notification Sound Length Required

Cancel Save

VST Administrators

Blair, Steve 
 Davis, Miles 

Members (14)

Blair, Steve	Status: Available
Bley, Carla	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Marie, Rose	Status: Available

« 1 2 »

Create User... Invite...

- In the Sub Groups section, click the Edit link to the right of the group you want to update. The Update Group page appears.

vocera Admin Help Sign Out

ABELARD MEDICAL CENTER / PHYSICAL THERAPY

Update Group

Group Details

Group name Required

Secure Message Options

Members can send messages to whole group Required

Cancel Save

Members (0)

Remove Selected Add ..

3. If necessary, update the membership in the group as described in [How to Manage Membership in a Group](#) on page 93.
4. If necessary, update the details as described in [Update Group Page Reference](#) on page 93 and click **Save**.

The Update Group page refreshes and displays the new details.

Update Group Page Reference

The Update Group page allows you to add members to and remove members from the group. You can also update the group details.

Table 26: Group Details

Field	Description
Group Name	The name of the group, specified using any combination of letters and numbers.
Members allowed to send messages to whole group	Specifies whether members of the parent organization are allowed to send messages to this group. If you set this value to Yes , the group appears as a contact for each member of the organization. If you set this value to No , the group does not appear as a contact; it is used to assign permissions only. This field is disabled until the group has members.

How to Manage Membership in a Group

Manage the membership in a group by adding and removing users. Users you remove remain in your organization, but they are removed from the group.

To manage the membership of a group:

1. If you are not on the Update Group page, navigate to it as described in [How to Update a Group](#) on page 91.
2. If you want to remove members from the group, check their names in the **Members** section and click **Remove Selected**.

The screenshot shows the 'Update Group' interface for 'ABELAND MEDICAL CENTER' under 'PHYSICAL THERAPY'. The 'Group Details' section includes a 'Group name' field (required) with 'Physical Therapy' entered. The 'Secure Message Options' section has a dropdown for 'Members can send messages to whole group' set to 'No'. Below these are 'Cancel' and 'Save' buttons. The 'Members (4)' section lists four members with checkboxes and their status (all 'Available'): Blair, Steve; Biley, Carla; Marie, Rose; and Pepper, Art. At the bottom right of the members list are 'Remove Selected' and 'Add...' buttons.

The Update Group page removes the members from the list.

3. If you want to add members to the group, do the following:
 - a. In the **Members** section of the Update Group page, click **Add**.

The **Select users to add to group** page appears.

Select user(s) to add to group: Physical Therapy

Hold Ctrl (or Command on Mac) to select multiple users.

Search

Brown, Charlie
Brown, Sally
Davis, Miles
Patty, Peppermint
Schultz, Marcie
Van Pelt, Lucy

Cancel OK

- b. Select the users you want to add to the group and click OK. You can click a member, hold down the Ctrl key and click to select multiple members, or hold down the Shift key and click to select a range of members.

The Update Group page appears again, and the members you have selected are listed in the Members section.

vocera

Admin Help Sign Out

ABELARD MEDICAL CENTER PHYSICAL THERAPY

Update Group

Group Details

Group name Required
Physical Therapy

Secure Message Options
Members can send messages to whole group
No

Cancel Save

Members (6)

<input type="checkbox"/>	Blair, Steve	Status: Available
<input type="checkbox"/>	Bley, Carla	Status: Available
<input type="checkbox"/>	Marie, Rose	Status: Available
<input type="checkbox"/>	Pepper, Art	Status: Available
<input type="checkbox"/>	Schultz, Marcie	Status: None
<input type="checkbox"/>	Van Pelt, Lucy	Status: None

Remove Selected Add

Select Users to Add to Group Page Reference

The Select Users dialog box allows you to specify which members of your organization to add to the group.

Table 27: Select Users

Field	Description
Search	Optionally enter all or part of the name of a member in your organization to filter the list of names.
Member Name	Lists the members of your organization and allows you to select them to add to the group.

Working with Users

In the Vocera Secure Texting application, a *user* is a person who uses either the VST Handheld Client or VST Web Client. Every person in your organization who works with a VST client needs to have a user account in the VST Administration Console. As an administrator, you can add and update these user accounts to meet the needs of your organization.

VST User Synchronization

When your on-premises and cloud components are correctly integrated, the VS, VMP, and VST servers synchronize their users with each other to provide the client applications with seamless communication capabilities. The topics in this section provide details about how users are synchronized between the servers in a correctly integrated deployment.

Types of Users

To VST, a user is a person who has a profile within the VST server. Similarly, to VS and VMP, a user is a person who has a profile within those respective on-premises systems.

Because VST integrates with on-premises Vocera systems and affiliated organizations that may or may not have Vocera systems, various messaging scenarios involve different types of users with different capabilities.

Table 28: Types of Users

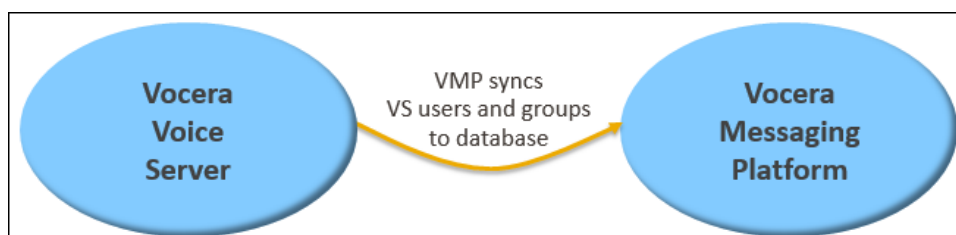
User Type	Description
Anonymous user	<p>A user who is unknown to either VST or to VMP. In some messaging situations, a user is known to one of these systems but unknown to the other platform.</p> <ul style="list-style-type: none">From the VST point of view, an anonymous user is a VS user who is not in the <code>VSTContacts</code> group, and is consequently not synced and unknown to VST. If an anonymous user appears in a conversation, VST tracks that user in its database for internal purposes. For example, suppose a VCS user sends a message to a badge user who does not have a VST account (a dedicated badge user who is not in <code>VSTContacts</code>) and also to a VST user. To the VST system, the badge user is anonymous but is tracked to allow the VST user potentially to respond to the conversation.From the VMP point of view, an anonymous user is a member of an organization that is two levels removed from it, and is consequently not synced and unknown to the VMP server. For example, suppose Abelard Hospital is affiliated with both San Jose Medical Center and Palo Alto Medical Center in VST, but San Jose and Palo Alto are not affiliated with each other. If San Jose Medical Center has an on-premises VMP system, Palo Alto Medical users are anonymous to it, because Palo Alto is not an affiliate of San Jose.

User Type	Description
Linked user	<p>An external VS user profile that is linked to a native VST user profile.</p> <ul style="list-style-type: none"> If the linked account belongs to a badge user, the user has access to both the badge and also the VST application. Messages are sent to devices as described in Message Routing for Linked Users on page 120. If the linked account belongs to a VCS user, the VST application takes precedence, and the VCS application is no longer available. In general, you should not create a native VST profile for a VCS user.
VS user	A person who has a profile on the Vocera Voice Server; a badge or VCS user.
VST user (external)	A VS user who has been synced into VST.
VST user (native)	A person who has a user profile that was created directly within VST.

VMP-VS-VST Syncing

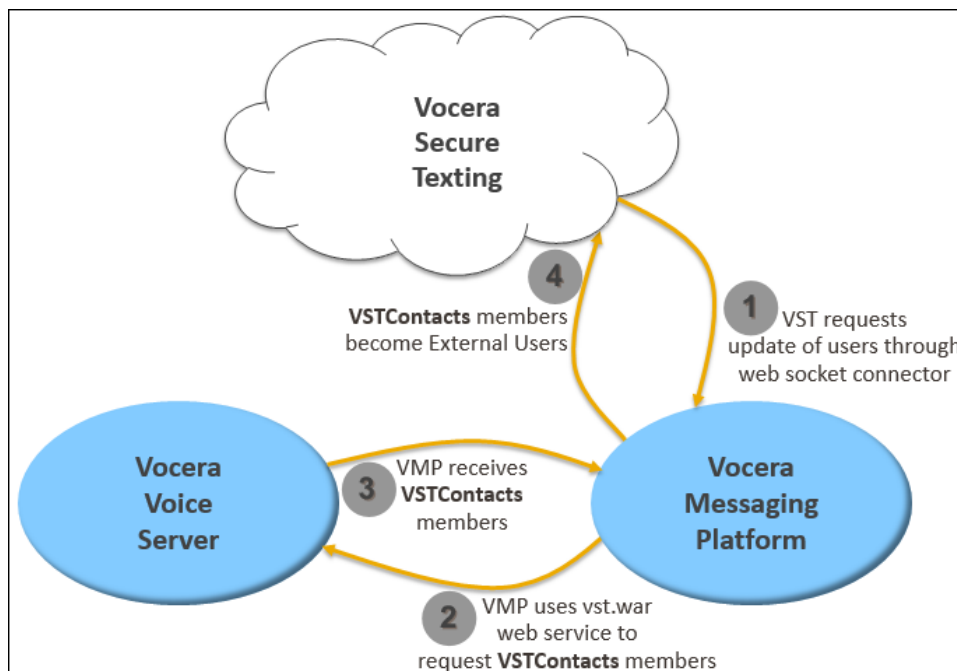
When a VST deployment has both the Vocera Messaging Platform and the Vocera Voice Server in its on-premises environment, users are synced between the three servers.

When a Vocera Messaging Platform server and a Vocera Voice Server are integrated properly, the VMP syncs all users and groups from the VS. This behavior is not related to VST—it is part of the basic VS-VMP interaction.



When the two systems are then integrated with VST, VMP syncs the `VSTContacts` group and its members from the Vocera Voice Server as part of this basic sync operation. These users are synced to the VMP database; however, when VMP syncs the members of `VSTContacts` to the VST server, it uses a web service to request the most recent membership from VS—not the database.

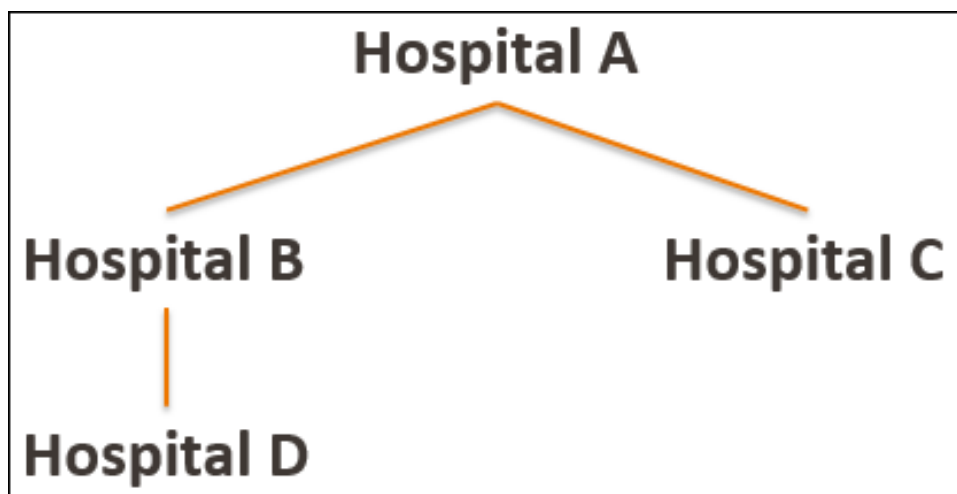
The connector that is built into the VMP machine maintains a web socket connection to VST. Every 90 minutes, VST uses this connection to request a sync of users in `VSTContacts` from VMP. VMP in turn uses the `vst.war` web service to retrieve members of `VSTContacts` from the Vocera Voice Server and then syncs these users to VST with the web socket connection. VST creates an `External User` for each member of the group; all of these `VSTContacts` users will appear on VST handheld clients as contacts.



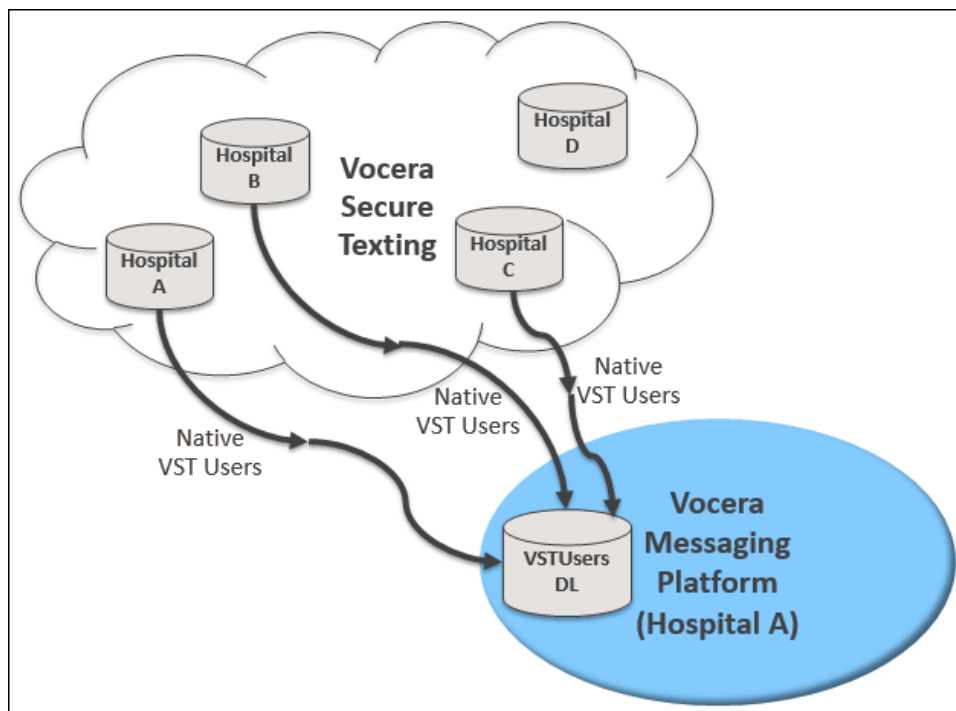
The VMP server manages the membership of the **VSTUsers** distribution list (DL). This DL is automatically created by the VMP, and its members are auto-synced from VST (usually in real time; it may take up to 10 minutes in certain situations). All of the members of **VSTUsers** appear as contacts for VCS users who have permissions to the DL.

VMP populates the **VSTUsers** DL by syncing members of the VST organization to which it is *directly connected*. In addition VMP syncs the native VST users who are members of the organizations with which it is *affiliated*. VMP does not sync external users from its affiliated organizations unless they are linked to native user profiles.

For example, suppose the on-premises Vocera system of Hospital A is connected to VST and affiliated with Hospital B and Hospital C, but not with Hospital D, as shown below.



The on-premises VMP of Hospital A syncs the native VST users of its own organization, as well as the native VST users of Hospital B and Hospital C, as shown below.



Note: If a VS user also has a VST account but is not linked to it, the VCS and VST apps will display a "double user".

In the VCS app:

- The first user appears because the VCS contacts list includes all VS users
- The second user appears because the VCS contacts list includes members of the VSTUsers DL.

In the VST app:

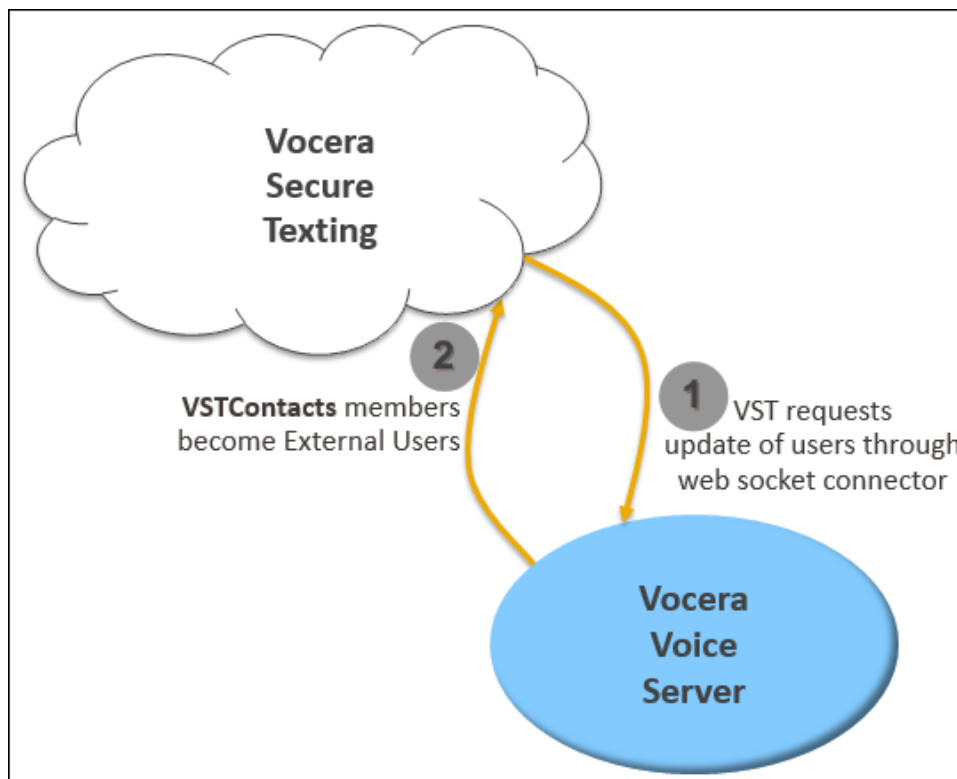
- The first user appears because the VST contacts list includes all native VST users
- The second user appears because the VST contacts list also includes the External Users from VSTContacts.

VS-VST Syncing

When a VST deployment has only the Vocera Voice Server in its on-premises environment, users are synced between the two servers.

When the Vocera Voice Server is integrated with the Vocera Secure Texting server, the Vocera Secure Texting Sync Connector you install on the VS is responsible for syncing VS contacts to the VST.

The connector that is installed on the VS machine maintains a web socket connection to VST. Every 90 minutes, VST uses this connection to request a sync of users in VSTContacts. The Tomcat server running on the VS machine uses the `vst.war` web service to retrieve members of VSTContacts from the Vocera Voice Server and then syncs these users to VST with the web socket connection. VST creates an External User for each member of the group; all of these VSTContacts users will appear on VST handheld clients as contacts.



VST does not sync users to the VS, because badge users are unable to send texts or place calls to VST users.



Note: If a VS user also has a VST account but is not linked to it, the VST apps will display a "double user".

- The first user appears because the VST contacts list includes all native VST users
- The second user appears because the VST contacts list also includes the External Users from VSTContacts.

How to Initiate a User import Manually

You can use the Vocera Secure Texting Administration Console to import users from the on-premises Vocera system on demand. This operation is not usually necessary because the sync occurs automatically every 90 minutes; however, it may be helpful in certain troubleshooting situations.

To import users manually:

1. Log into the Vocera Secure Texting Administration Console.
The Update Organization page for your organization appears.

Update Organization

Organization Details

Group ID
413

Group name Required
Augustine Medical Center

Office number Required
(408) 882-5830

Voice number ⓘ
(408) 550-7227

Default time zone
US/Pacific

Secure Message Options

Members can send messages to whole organization ⓘ
Yes

Allow messages to non-users via email and SMS ⓘ
Yes

Message Expiration Time ⓘ
7 Days

High Priority Notification Sound Length ⓘ
30 Seconds

Cancel Save

2. Select Admin > Integrations from the menu at the top right of any page.

The Integrations page appears, and the Vocera Sync Adapter Status and Import Results sections are visible. The Vocera Sync Adapter Status is set to Connected.

Integrations

Vocera Voice Server & Collaboration Suite

Integration User ID ⓘ
qNwWgzlpWzz

Shared Key ⓘ
gDz2Cgru3n68TxXaKVvsASB9sllf0

Vocera Sync Adapter Status ⓘ
Connected Sync Users Now

Import Results

Date Started	Date Ended	Created	Unchanged	Updated	Deleted	Overwritten	Errors
7/29/15 1:07 PM	7/29/15 1:07 PM	0	0	0	0	0	0

3. Click Sync Users Now.

The page refreshes and the Import Results table is updated. If any imported users changed, the Previously Imported Users is updated also.

Inviting Users

The most efficient way to add new users to VST is to send them an invitation. When users accept the invitation, they register themselves and create their own user accounts. All you need is an email address to invite a new user.

How to Invite a User

Send new users an email that invites them to register and begin using one of the VST clients.

To invite a new user to begin working with VST:

1. From any page in the VST Administration Console, select **Admin > Manage Users** from the menu on the top right.

The Find Users page appears.

The screenshot shows the 'Find Users' page. At the top, there's a navigation bar with 'Admin', 'Help', and 'Sign Out'. Below it, the breadcrumb is 'ABELARD MEDICAL CENTER / FIND USERS'. The main area has tabs: 'USERS' (selected), 'Find', 'Create', 'Invite Users', and 'Invitations'. On the left, there's a 'Search' section with input fields for 'First Name', 'Last Name', 'User ID (Email)', and 'User Type' (set to 'All'). A 'Submit' button is at the bottom. On the right, the 'Results' section shows a table with columns 'Name', 'User Type', and 'Profile'. The table lists six users with their names, roles, and 'View' links.

Name	User Type	Profile
Blair, Steve	Physician	View
Davis, Miles	Physician	View
Marie, Rose	Non-Physician	View
Pepper, Art	Physician	View
Rollins, Maya	Physician	View
Strong, Ellen	External User	View

2. Select the **Invite Users** link at the top of the Find Users page.

The Invite Users page appears.

The screenshot shows the 'Invite Users' page. The breadcrumb is 'ABELARD MEDICAL CENTER / INVITE USERS'. The main area has tabs: 'USERS', 'Find', 'Create', 'Invite Users' (selected), and 'Invitations'. The page contains instructional text about inviting users via CSV or email. There are two main sections: 'Upload CSV File' with a 'Choose File' button and a 'Download sample CSV file' link, and 'Email Addresses Separated By Spaces Or Carriage Returns' with a text input field. At the bottom, there are 'Cancel' and 'Invite' buttons.

3. Do either of the following:

- Enter the email address of the user you want to invite in the **Email Addresses** field. You can enter multiple addresses by separating them with spaces or carriage returns.
- Click **Choose File** and navigate to a file containing a list of user email addresses in CSV (comma-separated value) format.

If you choose the CSV option, download the sample file and use it as a template. Values in the **Email** field of the template are required and are imported as email addresses; values in the **Department** field are optional and are imported as groups; values in the other fields are optional and for your reference only.

4. Select **Invite**.

The system displays the following message in a teal banner when the request is complete:
"Invitations have been sent successfully."

If any email address is not formatted according to Internet standards, the VST Administration Console will display an error message and abort the entire operation.

If any values were specified in the **Department** column, the system creates groups with those names.

After the user accepts the invitation and registers, a user account is created. You can view the user account as described in [How to Update a User Profile](#) on page 110.

If the invited user is an administrator, the administration account is not associated with a practice or organization until the user registers.

Invite Users Page Reference

The **Invite Users** page allows you to send email invitations inviting people in your organization to use one of the VST Administration Console clients.

Table 29: Invite Users Page Reference

Field	Description
Choose File	Opens Windows Explorer and lets you navigate to CSV file specifying the email addresses and names of users to upload.
Download Sample File	Opens Windows Explorer and lets you navigate to a directory where you can download a sample CSV file showing the proper formatting for a bulk invitation of users.
Email Addresses	Enter a list of email addresses for the users you want to invite, separating them with spaces or carriage returns.

Managing Invitations

After you send users an invitation, you can view the status of each invitation to see if the user registered, or to find out what stage the invitation is in. If an invitation has not been accepted, you can resend it.

How to View Invitation Status

View the status of an invitation you have sent to determine whether it is progressing as expected or if it is stalled anywhere in the process. For example, you can view the date and time you sent an invitation to a user. If the user clicks the registration link in the email or completes the registration, you can also see the date and time when those events occurred.

To view the status of a VST invitation:

1. From any page in the VST Administration Console, select **Admin > Manage Users** from the menu on the top right.
The **Find Users** page appears.

Search

First Name
First Name

Last Name
Last Name

User ID (Email)
Userid (Email)

User Type
All

Submit

Results

Name	User Type	Profile
Blair, Steve	Physician	View
Davis, Miles	Physician	View
Marie, Rose	Non-Physician	View
Pepper, Art	Physician	View
Rollins, Maya	Physician	View
Strong, Ellen	External User	View

Results per page: 10

- Select the Invitations link at the top of the Find Users page.

The Invitations page appears and displays the status of each invitation you have sent. The Last Updated column shows the date and time that the invitation's status most recently changed.

Invitations

Email Address Last Name First Name All Selected: Resend

Email Address	Last Name	First Name	Status	Last Updated
sblair@abelardmedical.org			User Clicked	5/18/2015 11:18:05 PM UTC
lrollins@abelardmedical.org			Email Sent	5/18/2015 9:30:54 PM UTC
bevans@stnicholaspediatric.org			Email Sent	6/12/2015 3:44:46 PM UTC
hhancock@stnicholaspediatric.org			Pending	4/13/2015 7:47:10 PM UTC
mrollins@stnicholaspediatric.org			Registered	5/8/2015 8:14:37 PM UTC
ywu@stnicholaspediatric.org			Registered	5/18/2015 11:53:59 PM UTC

Following are the definitions of each possible message status:

- Pending: The system has queued the invitation email for sending.
- Email Sent: The system has successfully delivered the invitation email.
- Failure: The email delivery failed because the email address is incorrect or not in use.
- User Clicked: The user clicked the registration link in the email message but did not register.
- Registered: The user successfully registered, and the system created a user profile.

- Optionally enter a value in the Email Address, Last Name, and/or First Name fields to filter the list of invitations.

The Invitations page begins filtering the list of invitations dynamically as you enter values in the filters.

ABELARD MEDICAL CENTER / INVITATIONS

USERS: Find Create Invite Users **Invitations**

stnicholas Last Name First Name All Selected: Resend ➔

Email Address	Last Name	First Name	Status	Last Updated
bevans@stnicholaspediatric.org			Email Sent	6/12/2015 3:44:46 PM UTC
hhancock@stnicholaspediatric.org			Pending	4/13/2015 7:47:10 PM UTC
mrollins@stnicholaspediatric.org			Registered	5/8/2015 8:14:37 PM UTC
ywu@stnicholaspediatric.org			Registered	5/18/2015 11:53:59 PM UTC

VST filters the values that appear in each column based on the characters that you enter in its respective filter. The filters are case-insensitive and match values that appear in any position within each column's data. For example, entering "ast" in the Email Address filter matches "astafford@abelardmedical.org" as well as "kmaster@abelardmedical.org".

How to Resend an Invitation

You can resend any invitation except one that is already in the Registered state. Resending invitations is useful if a user cannot locate it for any reason, or if you suspect that it was not delivered.

To resend a VST invitation:

1. From any page in the VST Administration Console, select Admin > Manage Users from the menu on the top right.

The Find Users page appears.

ABELARD MEDICAL CENTER / FIND USERS

USERS: **Find** Create Invite Users Invitations

Search

First Name
First Name

Last Name
Last Name

User ID (Email)
Userid (Email)

User Type
All

Submit

Results

Results per page: 10

Name	User Type	Profile
Blair, Steve	Physician	View
Davis, Miles	Physician	View
Marie, Rose	Non-Physician	View
Pepper, Art	Physician	View
Rollins, Maya	Physician	View
Strong, Ellen	External User	View

2. Select the Invitations link at the top of the Find Users page.

The Invitations page appears and displays the status of each invitation you have sent.

Email Address	Last Name	First Name	Status	Last Updated	
sblair@abelardmedical.org			User Clicked	5/18/2015 11:18:05 PM UTC	<input type="checkbox"/>
lrollins@abelardmedical.org			Email Sent	5/18/2015 9:30:54 PM UTC	<input type="checkbox"/>
bevans@stnicholaspediatric.org			Email Sent	6/12/2015 3:44:46 PM UTC	<input type="checkbox"/>
hhancock@stnicholaspediatric.org			Pending	4/13/2015 7:47:10 PM UTC	<input type="checkbox"/>
mrollins@stnicholaspediatric.org			Registered	5/8/2015 8:14:37 PM UTC	<input type="checkbox"/>
ywu@stnicholaspediatric.org			Registered	5/18/2015 11:53:59 PM UTC	<input type="checkbox"/>

3. Select the check box to the right of each user whose invitation you want to resend, or choose the check box in the title row to select all displayed users.
4. Click the arrow to the right of the **Selected: Resend** control.

A dialog box appears and asks you to confirm your action.

Confirm

Are you sure you want to resend the selected invitations?

Note: invitations already in the 'Registered' state will not be resent.

Cancel Resend

5. Click **Resend**.
The system sends a new invitation to each selected user.

How to Delete an Invitation

If a user has not yet accepted an invitation, you can delete it to prevent the user from joining your organization. For example, you can delete a **Pending** invitation that was unintentionally sent to the wrong email address. If a user is already registered, deleting the invitation only removes it from the display. For example, you may want to delete invitations whose status is **Registered**, because they require no further action on your part.

To delete a VST invitation:

1. From any page in the VST Administration Console, select **Admin > Manage Users** from the menu on the top right.
The **Find Users** page appears.

2. Select the Invitations link at the top of the Find Users page.

The Invitations page appears and displays the status of each invitation you have sent.

3. Select the check box to the right of each user whose invitation you want to delete, or choose the check box in the title row to select all displayed users.
4. Use the control next to Selected to choose the Delete action.
5. Click the arrow to the right of the Selected: Delete control.

A dialog box appears and asks you to confirm your action.

6. Click Delete.

The list of users on the Invitations page refreshes, and the selected users are removed. If any of the users have not yet registered, the VST server now prevents them from accepting the invitation.

Invitations Page Reference

The Invitations page allows you to view the status of all email invitations you have sent.

Table 30: Invitations Page Reference

Field	Description
Email Address	The email address of the person to whom you sent the invitation.
Last Name	The last name (family name) of the person to whom you sent the invitation.
First Name	The first name (given name) of the person to whom you sent the invitation.
Status	<p>The status of the invitation, defined as follows:</p> <ul style="list-style-type: none"> • Pending: The system has queued the invitation email for sending. • Email Sent: The system has successfully delivered the invitation email. • Failure: The email delivery failed because the email address is incorrect or not in use. • User Clicked: The user clicked the registration link in the email message but did not register. • Registered: The user successfully registered, and the system created a user profile.
Last Updated	The date and time that the invitation's status most recently changed.

Creating Users

Unlike inviting a user, creating a user creates the user account in the database immediately, and provides additional control by allowing you to fill out the user profile more completely. However, you still need to send the users an invitation so they can register.

How to Create a User

You can create a user account directly in the database and complete details the profile manually.

To create a user profile for VST:

1. From any page in the VST Administration Console, select **Admin > Manage Users** from the menu on the top right.

The Find Users page appears.

The screenshot shows the 'Find Users' interface in the VST Administration Console. The top navigation bar includes 'Admin', 'Help', and 'Sign Out' links. Below the header, the breadcrumb 'ABELARD MEDICAL CENTER / FIND USERS' is visible. The main content area has tabs for 'USERS', 'Find', 'Create', 'Invite Users', and 'Invitations'. The 'Find' tab is active. On the left, a 'Search' form contains input fields for 'First Name', 'Last Name', 'User ID (Email)', and a dropdown for 'User Type' (set to 'All'). A 'Submit' button is at the bottom of the search form. On the right, a 'Results' table displays a list of users. The table has columns for 'Name', 'User Type', and 'Profile'. Each row includes a 'View' link in the 'Profile' column.

Name	User Type	Profile
Blair, Steve	Physician	View
Davis, Miles	Physician	View
Marie, Rose	Non-Physician	View
Pepper, Art	Physician	View
Rollins, Maya	Physician	View
Strong, Ellen	External User	View

2. Select the **Create** link at the top of the Find Users page.

The Create User Profile page appears.

The screenshot shows the 'Create User Profile' page in the Vocera system. The page has a teal header with the Vocera logo and navigation links for Admin, Help, and Sign Out. Below the header, there's a breadcrumb trail: 'ABELARD MEDICAL CENTER / CREATE USER'. A navigation bar includes 'USERS:', 'Find', 'Create' (highlighted in orange), 'Invite Users', and 'Invitations'. The main section is titled 'Create User Profile' and contains a 'Basic Information' form. The form includes the following fields: Salutation, First Name (Required), Last Name (Required), Middle Name, Nickname, and Qualifications. Each field has a small information icon (i) next to it.

3. Provide information in the user's profile as needed. For details on the fields in the user profile, see [Create User Profile Page Reference](#) on page 108.

Create User Profile Page Reference

The Create User Profile page allows you to create a user account in the database.

Table 31: Basic Information

Field	Description
Title	The title or honorific that is to be added before the user's name (such as "Dr.").
First Name	The first name (given name) of the user. This field is required, and can be edited by an administrator only.
Last Name	The last name (family name) of the user. This field is required, and can be edited by an administrator only.
Credentials	The degree or other credentials that are to be added after the user's name (such as "M.D.").
Job Title	Identifies your area of specialization.

Table 32: Profile

Field	Description
Email	The office email address of the user. This field is required, and can be edited by an administrator only.
Cell (Private)	The mobile phone number. This field is required for you to use the call feature in the mobile clients and to be able to receive phone calls. When you send or receive a call, Vocera hides your personal phone number and instead displays your organization's Voice Number to the person you called. If you do not put in your cell phone number, you are not able to send and receive calls.
PIN	The four-digit PIN that the user will supply when logging into the Vocera Secure Texting handheld application. You can use any four-digit number. This field is required.
PIN is Temporary	Indicates whether the user must change the login PIN after logging in with their PIN for the first time.
Password	The user's password. The password must be a minimum of eight characters; any characters that you can type are supported. This field is required if the user needs access to the Vocera Secure Texting Administration Console.
Select Time Zone	The user's time zone. This field is required.

Field	Description
User Roles	Select VST Admin if the user is an administrator for this organization. Otherwise, leave this entry unchecked.

Table 33: Office

Field	Description
Office	The street address, city, state, and zip code (postal code) of the user's office location.
Office Phone	The user's office phone number.
Office Fax	The user's office fax number.

Table 34: User Type

Field	Description
Staff Type	The type of staff member. This is usually set to <i>Physician</i> . The other fields in this section are available when the staff member is a physician.
Specialty	Identifies your areas of specialization and sub-specialties.
Medical School	The user's medical school.
Residency	The user's residency.
Fellowship	Any fellowship the user has received.
Practice Description	A summary of the user's medical practice.
Home Page URL	Optionally specifies the Internet URL of your home page.

Updating Users

You can update a user profile at any time. You may want to update a profile to provide additional descriptive information for a user, change a PIN, disable the account, or perform other maintenance tasks.

How to Find a User

Find a user by specifying one or more criteria and searching.

To find a user:

1. From any page in the VST Administration Console, select **Admin > Manage Users** from the menu on the top right.

The Find Users page appears.

The screenshot shows the 'Find Users' interface in the VST Administration Console. At the top, there's a navigation bar with 'Admin', 'Help', and 'Sign Out'. Below it, the breadcrumb 'ABELARD MEDICAL CENTER / FIND USERS' is visible. The main area has tabs for 'USERS', 'Find', 'Create', 'Invite Users', and 'Invitations'. The 'Find' tab is active. On the left, a 'Search' section contains input fields for 'First Name', 'Last Name', 'User ID (Email)', and a 'User Type' dropdown menu set to 'All'. A 'Submit' button is at the bottom of the search section. On the right, a 'Results' table displays a list of users with columns for 'Name', 'User Type', and 'Profile'. Each user entry has a 'View' link in the 'Profile' column. The table shows six users: Blair, Steve (Physician); Davis, Miles (Physician); Marie, Rose (Non-Physician); Pepper, Art (Physician); Rollins, Maya (Physician); and Strong, Ellen (External User). A 'Results per page' dropdown is set to 10.

By default, the page displays 10 rows of results. Optionally use the [Results per page](#) control to change the number of results displayed on a single page.

2. In the fields in the Search panel, type one or more search criteria. For example, to search for all users whose last name is Salamone, type **Salamone** in the Last Name field.
3. Click [Submit](#).

The search results appear in the [Results](#) pane to the right.

By default, the results are sorted in ascending order by values in the Name column (indicated by the Up arrow). Click the column title to toggle between ascending and descending order, or click [User Type](#) to sort results by that column. Click [Name](#) again to resume sorting in the default order.

How to Update a User Profile

After you find the user you want to work with, you can view and edit the user profile.

To update a user profile:

1. Locate the user whose profile you want to edit. See [How to Find a User](#) on page 109.
2. To the right of the user's name, click the [View](#) link.


The profile for that user is displayed.

vocera System Admin Admin Tools Help Sign Out

SYSTEM ADMIN / EDIT USER

USERS: [Find](#) [Create](#) [Invite Users](#) [Invitations](#)

Update User Profile



StaffID
121526

Title [?]
e.g. Dr

Status
Available

First Name Required [?]
Van

Last Name Required [?]
Morrison

Credentials [?]
e.g. MD

Job Title
e.g. Director of Operations

Profile

Email Required [?]
van.morrison@StDominics.org

Cell (Private) Required [?]
(555) 669-2750

PIN Required [?]
xxxx [Reset PIN](#)

PIN is Temporary (Change at next login) [?]
No

Password [?]

Can Login [?]
Login Enabled

Select Time Zone [?]
US/Pacific

User Roles [?]
☒ VST Admin
 ☐ System Administrator (Vocera Employee)

Office

Address 1
Address 1

Address 2
Address 2

City
City

State
State

Zip
Zip

Office Phone
e.g. 3105551212

Office Fax
e.g. 3105551212

User Type - Non-Physician

No additional attributes are available for non-physicians.

Groups

Name	Type	Action
St. Dominic's Urgent Care	Organization	Remove
ED Nurses	Subgroup	Remove

VST Number Provisioning [?]

Do not provision

User's Devices

Name	Status	Most Recent Activity	Remove Access
Android	Device is Active. Push Notification Active	Thu Oct 06 17:03:44 UTC 2016	Disable Notification Wipe Device

- Edit the user's profile information as needed. For details on the fields in the user profile, see [Update User Profile Page Reference](#) on page 112.
- Click **Update** to update the user profile.

Update User Profile Page Reference

The Update User Profile page allows you to maintain and manage a user account.

Table 35: Basic Information

Field	Description
Profile Image	Choose an existing photo for your profile. If you are using the handheld client, you may also use your phone's camera to take a new photo.
StaffID	The internal staff ID number for this user, which is automatically generated and cannot be changed.
Title	The title or honorific that is to be added before the user's name (such as "Dr.").
Status	Indicates availability for messages or calls. Set to one of <i>None</i> , <i>Available</i> , <i>Busy</i> , or <i>Unavailable</i> . The default is <i>Available</i> .
First Name	The first name (given name) of the user. This field is required, and can be edited by an administrator only.
Last Name	The last name (family name) of the user. This field is required, and can be edited by an administrator only.
Credentials	The degree or other credentials that are to be added after the user's name (such as "M.D.").
Job Title	Identifies your area of specialization.

Table 36: Profile

Field	Description
Email	The office email address of the user. This field is required, and can be edited by an administrator only.
Cell (Private)	The mobile phone number. This field is required for you to use the call feature in the mobile clients and to be able to receive phone calls. When you send or receive a call, Vocera hides your personal phone number and instead displays your organization's Voice Number to the person you called. If you do not put in your cell phone number, you are not able to send and receive calls.
PIN	The four-digit PIN that the user will supply when logging into the Vocera Secure Texting handheld application. You can use any four-digit number. This field is required.
PIN is Temporary	Indicates whether the user must change the login PIN after logging in with their PIN for the first time.
Password	The user's password. The password must be a minimum of eight characters; any characters that you can type are supported. This field is required if the user needs access to the Vocera Secure Texting Administration Console.
Select Time Zone	The user's time zone. This field is required.
User Roles	Select <i>VST Admin</i> if the user is an administrator for this organization. Otherwise, leave this entry unchecked.

Table 37: Linked Vocera Product Accounts

Field	Description
Organization	If an on-premises user profile is linked to a full VST user profile, displays the name of the VST organization.
User ID	If an on-premises user profile is linked to a full VST user profile, displays the on-premises user ID.
Voice Status	If an on-premises user profile is linked to a full VST user profile, displays either <i>LoggedIn</i> , <i>LoggedOut</i> , or <i>DND</i> to indicate the status of the user's badge.
Messaging Status	If an on-premises user profile is linked to a full VST user profile, displays either <i>LoggedIn</i> or <i>LoggedOut</i> to indicate the status of the user's VST client.

Field	Description
Unlink	If an on-premises user profile is linked to a full VST user profile, lets you unlink the two accounts.

Table 38: Office

Field	Description
Office	The street address, city, state, and zip code (postal code) of the user's office location.
Office Phone	The user's office phone number.
Office Fax	The user's office fax number.

Table 39: User Type (Attributes are for physicians only)

Field	Description
Specialty	Identifies your areas of specialization and sub-specialties.
Medical School	The user's medical school.
Residency	The user's residency.
Fellowship	Any fellowship the user has received.
Practice Description	A summary of the user's medical practice.
Home Page URL	Optionally specifies the Internet URL of your home page.

Table 40: Groups

Field	Description
Name	The names of groups this member belongs to.
Type	A description of the type of group; for example, an <i>Organization</i> .
Action	Allows you to remove this user from the group; it does not remove the user from the system.

Table 41: User's Devices

Field	Description
Name	The device name assigned by the user.
Status	Provides status information about the user's device, such as whether it is logged out or active. If the user has never logged into the VST handheld client, the device is considered logged out; after a user has logged in for the first time, the device is considered active.
Most Recent Activity	The date and time the device's app connected to the server.
Remove Access	Provides several choices to control access to the device. <ul style="list-style-type: none"> Disable Notification prevents the device from receiving mobile push notifications. After clicking this link, the <i>Status</i> column displays "Device is active. Push notifications not active." and the <i>Remove Access</i> column displays <i>Enable Notification</i>. Enable Notification allows the device to receive mobile push notifications. After clicking this link, the <i>Status</i> column displays "Device is active. Push notification active." and the <i>Remove Access</i> column displays <i>Disable Notification</i>. Wipe Device removes VST data from the mobile device and logs the user out. After clicking this link, the <i>Status</i> column displays "Remote wipe requested." and the <i>Remove Access</i> column displays <i>Delete Device Info</i>. Delete Device Info appears only when a user's device has been wiped. The command removes the device from the list in the <i>User's Devices</i> section of the <i>Update User Profile</i> page.

How to Reset a PIN

You can send an email to users allowing them to reset their PIN if they have forgotten it.

To reset a user PIN:


1. Locate the user whose profile you want to edit. See [How to Find a User](#) on page 109.
2. To the right of the user's name, click the [View](#) link.
The profile for that user is displayed.

vocera System Admin Admin Tools Help Sign Out

SYSTEM ADMIN EDIT USER

USERS: [Find](#) [Create](#) [Invite Users](#) [Invitations](#)

Update User Profile



Drop new profile image here to upload.

StaffID: 121526

Title:

Status:

First Name Required:

Last Name Required:

Credentials:

Job Title:

Profile

Email Required:

Cell (Private) Required:

PIN Required: [Reset PIN](#)

PIN is Temporary (Change at next login):

Password:

Can Login:

Select Time Zone:

User Roles: ☒ VST Admin ☐ System Administrator (Vocera Employee)

Office

Address 1:

Address 2:

City:

State:

Zip:

Office Phone:

Office Fax:

User Type - Non-Physician

No additional attributes are available for non-physicians.

Groups

Name	Type	Action
St. Dominic's Urgent Care	Organization	Remove
ED Nurses	Subgroup	Remove

VST Number Provisioning

User's Devices

Name	Status	Most Recent Activity	Remove Access
Android	Device is Active. Push Notification Active	Thu Oct 06 17:03:44 UTC 2016	<ul style="list-style-type: none"> Disable Notification Wipe Device

3. Click Reset PIN.

A Success message appears, indicating that the user has been sent an email with instructions for resetting the PIN.

The screenshot shows a user profile form with a success message overlay. The form fields include:

- StaffID: 119491
- Salutation: (dropdown menu)
- Status: Available (dropdown menu)
- First Name Required: Miles
- Last Name Required: Davis

A success message dialog box is displayed in the center, stating: "Success. A PIN Reset email has been sent to the user." The dialog box has a close button (X) in the top right corner.

Below the form, the word "Profile" is visible.

- close the Success message dialog box.

How to Change a PIN

Instead of prompting a user to reset a PIN, you can update it yourself either permanently or temporarily. You need to notify the user of this new PIN manually.

To change a user's PIN:


- Locate the user whose profile you want to edit. See [How to Find a User](#) on page 109.
- To the right of the user's name, click the View link.
The profile for that user is displayed.

vocera System Admin Admin Tools Help Sign Out

SYSTEM ADMIN / EDIT USER

USERS: [Find](#) [Create](#) [Invite Users](#) [Invitations](#)

Update User Profile



Drop new profile image here to upload.

StaffID: 121526

Title:

Status:

First Name Required:

Last Name Required:

Credentials:

Job Title:

Profile

Email Required:

Cell (Private) Required:

PIN Required: [Reset PIN](#)

PIN is Temporary (Change at next login):

Password:

Can Login:

Select Time Zone:

User Roles: ☒ VST Admin ☐ System Administrator (Vocera Employee)

Office

Address 1:

Address 2:

City:

State:

Zip:

Office Phone:

Office Fax:

User Type - Non-Physician

No additional attributes are available for non-physicians.

Groups

Name	Type	Action
St. Dominic's Urgent Care	Organization	Remove
ED Nurses	Subgroup	Remove

VST Number Provisioning

User's Devices

Name	Status	Most Recent Activity	Remove Access
Android	Device is Active. Push Notification Active	Thu Oct 06 17:03:44 UTC 2016	<ul style="list-style-type: none"> Disable Notification Wipe Device

- Enter the new PIN in the PIN field.
- Specify whether the new PIN is permanent or temporary in the PIN is Temporary field. If you specify a temporary PIN, the user must change it during the next login.

5. Click the **Update** button at the bottom of the page.

The user's PIN is changed. The user is not notified of the new PIN value; you must manually communicate it to the user.

How to Convert a User Type

You specify whether a user is a physician at the time the user profile is created. Users whose type is Physician have additional fields in their profile for information such as specialty type and sub-specialty; otherwise, the types are identical. You can change the type of a user at any time.

To change the type of a user:


1. Locate the user whose profile you want to edit. See [How to Find a User](#) on page 109.
2. To the right of the user's name, click the **View** link.
The profile for that user is displayed.

vocera System Admin Admin Tools Help Sign Out

SYSTEM ADMIN EDIT USER

USERS: [Find](#) [Create](#) [Invite Users](#) [Invitations](#)

Update User Profile



Drop new profile image here to upload.

StaffID: 121526

Title:

Status:

First Name Required:

Last Name Required:

Credentials:

Job Title:

Profile

Email Required:

Cell (Private) Required:

PIN Required: [Reset PIN](#)

PIN is Temporary (Change at next login):

Password:

Can Login:

Select Time Zone:

User Roles: ☒ VST Admin ☐ System Administrator (Vocera Employee)

Office

Address 1:

Address 2:

City:

State:

Zip:

Office Phone:

Office Fax:

User Type - Non-Physician

No additional attributes are available for non-physicians.

Groups

Name	Type	Action
St. Dominic's Urgent Care	Organization	Remove
ED Nurses	Subgroup	Remove

VST Number Provisioning

User's Devices

Name	Status	Most Recent Activity	Remove Access
Android	Device is Active. Push Notification Active	Thu Oct 06 17:03:44 UTC 2016	Disable Notification Wipe Device

3. In the **Convert to** field at the bottom of the profile, do either of the following:

- To indicate that the user is a non-physician staff member, click **Non-Physician Staff**.
- To indicate that the user is a physician, click **Physician**.

The user account is converted to the new type.

Linking Badge Users to VST Profiles

After integrating VST with your on-premises solution, badge users can both receive text messages and also respond to multiple choice messages, but they cannot respond to any other texts or initiate new messages. Set up VST profiles for your badge users to provide them with full access to the secure texting capabilities of the VST handheld client without affecting their ability to use the badge for voice interactions. If you allow an individual to have both a badge and a VST profile, you must *link* the profiles to avoid ambiguity in message delivery.

While there are many advantages to linking badge users with VST profiles, avoid linking VCS users with VST profiles. If you link VCS users to VST profiles, the system will prevent those users from accessing VCS; only the VST client will be available.

Message Routing for Linked Users

For linked profiles, message routing to end-user devices differs depending on whether your on-premises solution includes both a Vocera Voice Server and the Vocera Messaging Platform, or if it is a VS-only solution.

- If you have both the VS and VMP in your on-premises solution, text messages initiated by *users* of any application (for example, VST, VCS, Staff Assignment, the User Console, and so forth) are sent to the VST handheld client; text messages initiated by *systems* are sent to the badge.

Because integrations (such as nurse call or patient monitoring integrations) frequently take advantage of specific voice capabilities of the badge, all messages initiated by a system are delivered only to the badge, and not to the VST client. In addition, the badge continues as the sole recipient of email messages sent by the Vocera Voice Server, because those messages are also a critical component of certain integrations, such as the Vocera Environmental Services Integration. All user-initiated text messages are delivered to the VST client only.

- If you have a VS-only on-premises solution, text messages initiated by the VST client are sent to the VST handheld client; text messages initiated by all other means are sent to the badge.



Note: If the user has never logged into the VST handheld client, messages are sent to both the handheld client and the badge, to ensure delivery. After a user has logged in for the first time, the device is considered active and messages are sent as described above.

Text messages initiated by users of other applications, such as Staff Assignment and the User Console, as well as messages initiated by systems, are sent to the badge.


How to Link a Badge and a VST User Profile

When you populate VST with Vocera Voice Server users, they appear in VST as *Imported Users*. An imported user does not have a full VST profile and is not able to use a VST client. To provide full texting capabilities to imported users, you need to link the imported profile with a full VST user profile.

To link a badge and a VST user profile:

1. If you are not on the [Update Organization](#) page, navigate to it by selecting [Admin > Edit Organization](#) from the menu at the top right of any page.

The [Update Organization](#) page appears.

vocera  Admin Help Sign Out

AUGUSTINE MEDICAL CENTER

Update Organization

Organization Details

Group name Required

Office number Required

Voice number •

Default time zone

Secure Message Options


Members can send messages to whole organization •

Message Expiration Time •

Allow messages to non-users via email and SMS

High Priority Notification Sound Length

VST Administrators

[Lloyd, Charles](#) 

Members (21)

Bernelli, Claudia	Status: None
Choi, Martin	Status: None
Forsberg, Brian	Status: None
Frisell, Bill	Status: Available
Goodman, Gail	Status: None
Haden, Petra	Status: Available
Harland, Eric	Status: Available
Leisz, Greg	Status: Available
Lloyd, Charles	Status: Available
Lundberg, Denise	Status: None

« **1** 2 3 »

- In the **Members** section, click the name of an on-premises user who does not have a VST profile.
 On-premises users without VST profiles appear in the **Members** list with **Status** set to **None**.
 The **Imported User** page appears.

The screenshot shows the Vocera Admin interface. At the top, there's a teal header with the Vocera logo and navigation links: Admin, Help, and Sign Out. Below the header, a breadcrumb trail reads 'AUGUSTINE MEDICAL CENTER / EXTERNAL USER DETAIL'. The main content area is titled 'Imported User'. On the left, there's a placeholder image with the letters 'LV' and a link that says 'Link Linus to a Secure Texting user profile...'. To the right, there's a form with the following fields: StaffID (122015), First Name (Linus), Middle Name (empty), Last Name (Van Pelt), Badge Phone Number (empty), and External ID (2044ju-ivan_pelt).

- Click the link that says "Link *UserName* to a Secure Texting user profile..."
The VST attempts to find a match for the user and displays possible results for you to choose from.

The screenshot shows a dialog box titled 'Link Linus to a Secure Texting user profile'. It has a search field labeled 'Search by name:' with the text 'Linus Van Pelt' entered. Below the search field, it says 'Possible matches: No matches found.' At the bottom of the dialog, there is a link that says 'Create a new Secure Texting user profile for Linus'.

- Click one of the matches or choose *Create a new Secure Texting user profile*. If necessary, use the displayed Staff ID to identify one of the matched users uniquely.
A dialog box asks you to choose between inviting a user and creating a user profile. See [Working with Users](#) on page 95 for additional information.

The screenshot shows a dialog box with the title 'Select a method to create the new user profile:'. There are two radio button options: 'Send an invitation by email' (which is selected) and 'Create the user manually'. At the bottom right, there are two orange buttons: 'Cancel' and 'OK'.

- Do one of the following:
 - Select *Send an invitation by email* and click OK.
The *Invite a User* page appears.

When you enter the requested information and click **Send**, the **Invitations** page appears and lets you see the invitation status. See [How to View Invitation Status](#) on page 102 for more information about reviewing the status of an invitation.

- Select **Create the user manually** and click **OK**.

The **Create User Profile** page appears. Continue creating the VST user profile as described in [Creating Users](#) on page 107.

After either the user's acceptance of the invitation or your manual creation of the user profile, the imported profile is linked to a full VST user profile, and the user has access to both the badge and the VST messaging client. In addition, the **Linked Vocera Product Accounts** section of the **Update User Profile Page** displays information about the linked user profile. See [Update User Profile Page Reference](#) on page 112 for more information.

How to Unlink a Badge and a VST User Profile


When a native VST user profile is linked to an on-premises user profile, the **Update User Profile** page displays a section called **Linked Vocera Product Accounts**. If necessary, you can use this section of the **Update User Profile** page to unlink a native VST user profile and an on-premises user profile.



Important: If an individual is both a badge and a VST user, the two profiles must be linked to avoid ambiguity in message delivery. Unlink the profiles only if you are troubleshooting or planning to disable one of the user profiles.

To unlink a badge and a VST user profile:

1. If you are not on the **Update Organization** page, navigate to it by selecting **Admin > Edit Organization** from the menu at the top right of any page.
The **Update Organization** page appears.

vocera  Admin Help Sign Out

ABELARD MEDICAL CENTER

Update Organization

Organization Details

Group name Required

Office number Required

Voice number ●

Default time zone

Secure Message Options



Members can send messages to whole organization ●

Message Expiration Time ●

Allow messages to non-users via email and SMS

High Priority Notification Sound Length

VST Administrators

[Blair, Steve](#) 
[Davis, Miles](#) 

Members (12)

Blair, Steve	Status: Available
Brown, Charlie	Status: None
Brown, Sally	Status: Available
Davis, Miles	Status: Available
Dog, Snoopy	Status: None
Marie, Rose	Status: Available
Patty, Peppermint	Status: None
Pepper, Art	Status: Available
Rollins, Maya	Status: Available
Schultz, Marcie	Status: None

- In the Members section, click the name of the user whose profiles you want to unlink. The Update User Profile page appears.

The screenshot shows the 'Update User Profile' page in the Vocera system. The page is for user 'Sally Brown' with Staff ID '122257'. The profile section includes fields for Email, PIN, Password, Time Zone, License, Cell (Private), and PIN is Temporary. The 'Linked Vocera Product Accounts' section shows a table with one entry for 'Abelard Medical Center'.

Update User Profile

Staff ID: 122257

Title: e.g. Dr

Status: Available

First Name Required: Sally

Last Name Required: Brown

Credentials: e.g. MD

Job Title: e.g. Director of Operations

Profile

Email Required: sblairster+sallybrown@gmail.com

Cell (Private) Required: (831) 239-6184

PIN Required: XXXX

Reset PIN

PIN is Temporary (Change at next login): No

Password: Password

Select Time Zone: US/Pacific

User Roles: ☐ VST Admin

License: None

Linked Vocera Product Accounts

Organization	User ID	Voice Status	Messaging Status	
Abelard Medical Center	2011ju-sbrown	None	None	Unlink

- In the Linked Vocera Product Accounts section, click Unlink. A dialog box appears and asks you to confirm your action.

The dialog box is titled 'Confirm' and asks 'Are you sure you want to unlink this external user?'. It has two buttons: 'Cancel' and 'Unlink'.

Confirm

Are you sure you want to unlink this external user?

Cancel Unlink

- Click Unlink. A message confirms that you have unlinked the user. Close the message to view the Update User Profile page again.

Unlocking a User Account

If a user fails to log into the client after 10 successive attempts, VST locks the user account. After the 5th failure, the system also enforces a three-minute wait between each successive login attempt. When a user account is locked, the user cannot access it until an administrator unlocks it.

How to Unlock a User Account

When VST locks a user account, the **Can Login** field on the **Update User Profile** page displays the message "Invalid login hard limit reached. Delaying login attempts." Unlock the account by using this field to enable it again.

To unlock a user account:

1. Locate the user whose profile you want to edit. See [How to Find a User](#) on page 109.
2. To the right of the user's name, click the **View** link.


The profile for that user is displayed.

vocera System Admin Admin Tools Help Sign Out

SYSTEM ADMIN / EDIT USER

USERS: [Find](#) [Create](#) [Invite Users](#) [Invitations](#)

Update User Profile



Drop new profile image here to upload.

StaffID: 121526

Title:

Status:

First Name Required:

Last Name Required:

Credentials:

Job Title:

Profile

Email Required:

Cell (Private) Required:

PIN Required: [Reset PIN](#)

PIN is Temporary (Change at next login):

Password:

Can Login:

Select Time Zone:

User Roles: ☒ VST Admin ☐ System Administrator (Vocera Employee)

Office

Address 1:

Address 2:

City:

State:

Zip:

Office Phone:

Office Fax:

User Type - Non-Physician

No additional attributes are available for non-physicians.

Groups

Name	Type	Action
St. Dominic's Urgent Care	Organization	Remove
ED Nurses	Subgroup	Remove

VST Number Provisioning

User's Devices

Name	Status	Most Recent Activity	Remove Access
Android	Device is Active. Push Notification Active	Thu Oct 06 17:03:44 UTC 2016	<ul style="list-style-type: none"> Disable Notification Wipe Device

- Set the value of the Can Login field to Login Enabled.
- Provide a new PIN for the user in the PIN field.

5. Optionally make the new PIN temporary, requiring the user to reset it at the next login, by setting the value of the PIN is Temporary field to Yes.
6. Click the [Update](#) button at the bottom of the page.

The account is unlocked and the user's PIN is changed. The user is not notified of the new PIN value; you must manually communicate it to the user.