VST Practice Administrator Guide

Version 2.3.0

Notice

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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 6
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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 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	• VST iOS client version 2.3.0 client or greater • iOS 9.x or greater • Apple iPhone 5 or greater
VST Android Client	• VST Android client version 2.3.0 or greater • Android OS 4.4 or greater
Vocera Collaboration Suite	For interoperability between the VST and VCS clients: • 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	`wss://sync-texting.vocera.com/ws/SyncService` or the following IP addresses: • 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	`wss://sync-texting.vocera.com/ws/SyncService` or the following IP addresses: • 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

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.

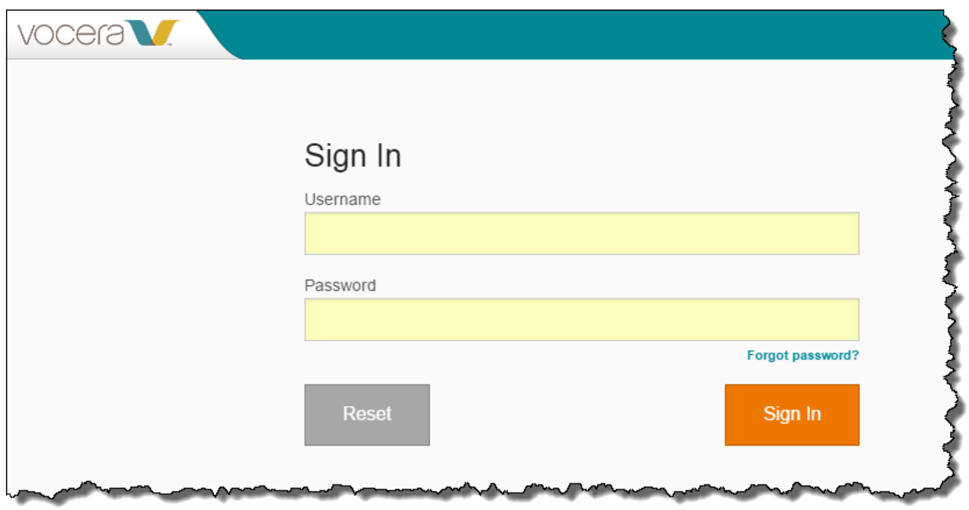
How to Log Into the VST Administration Console

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:

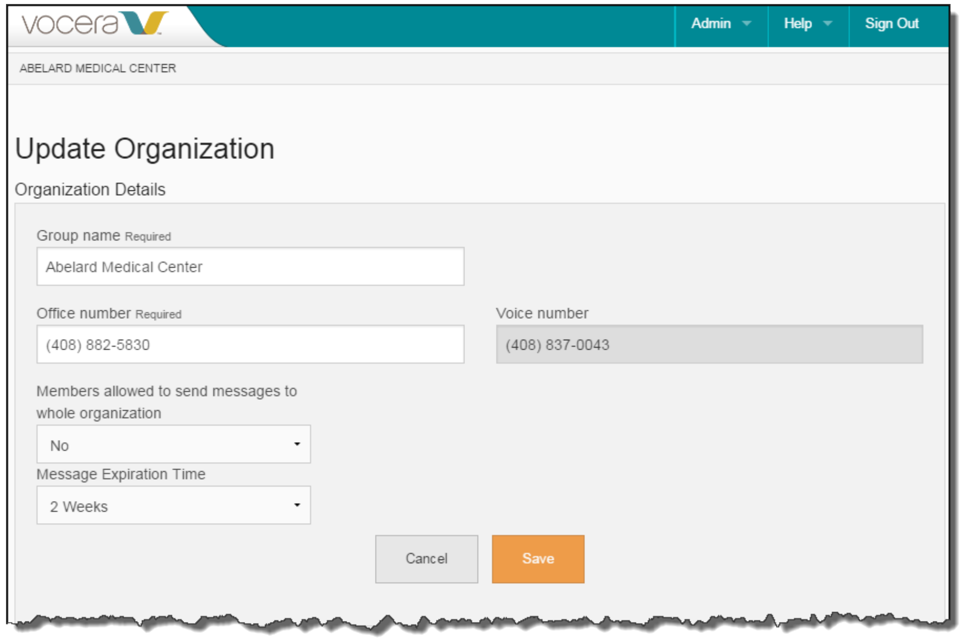
1. Open a web browser and navigate to https://vst-admin.vocera.com/.

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



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.



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 Practice 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.

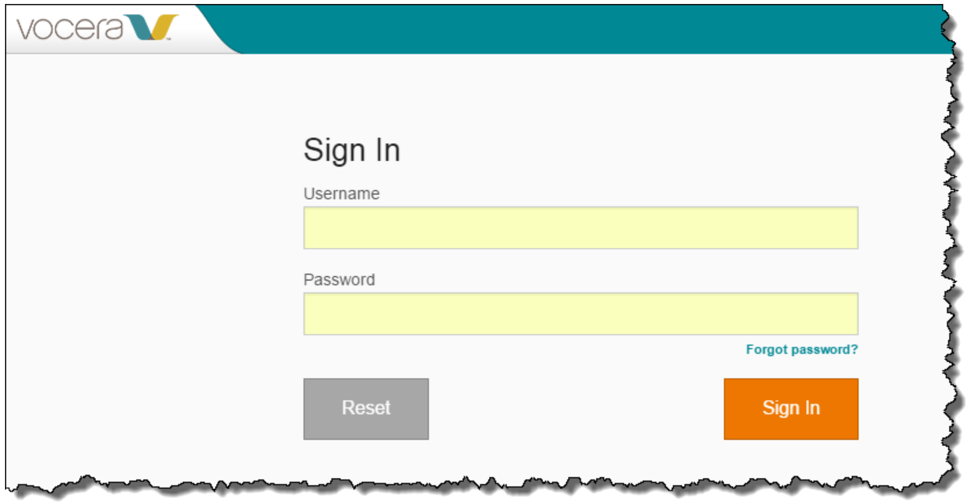
How to Reset the Administrator Password

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:

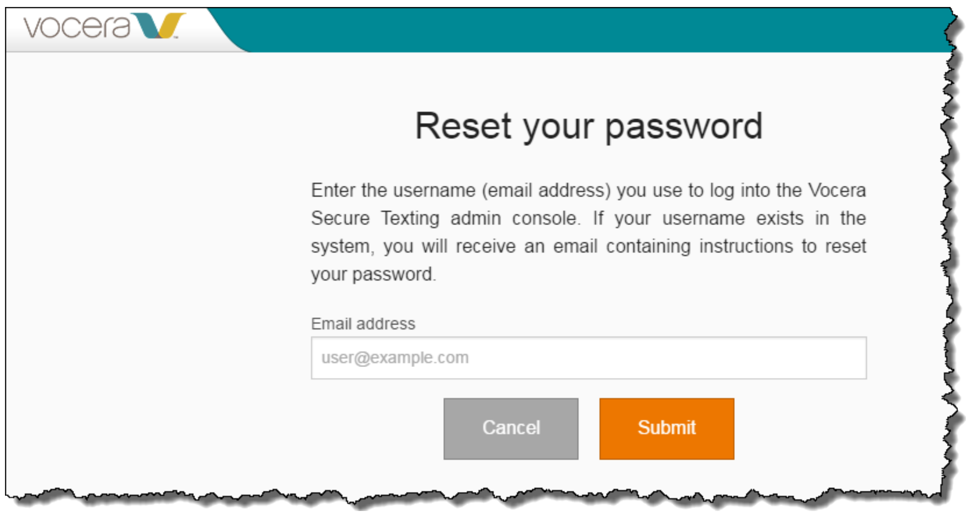
1. Open a web browser and navigate to https://vst-admin.vocera.com/.

   The VST Administration Console Sign In page appears.



2. Click the Forgot password? link.

   The Reset your password page appears.

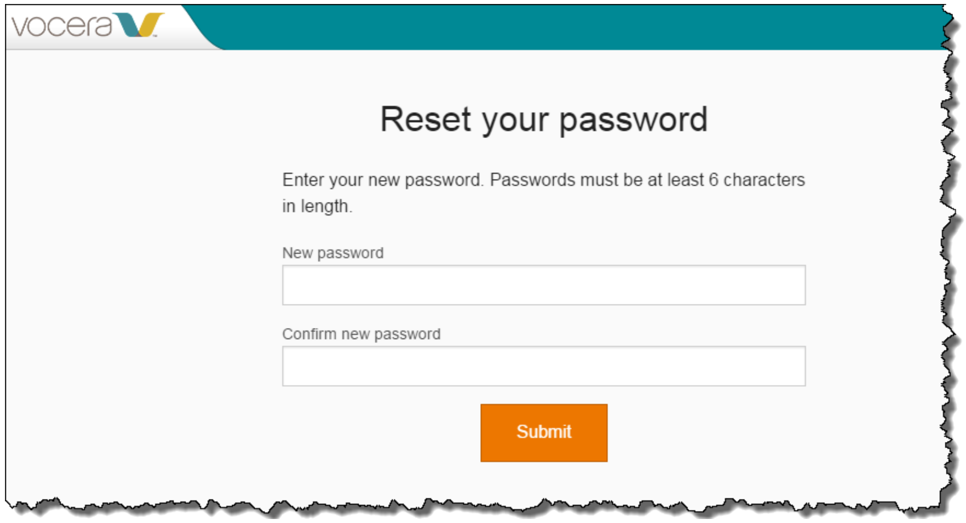


3. Enter your email address in the Email address field and click Submit.

   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.



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.

Administering the Vocera Secure Texting Solution

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.

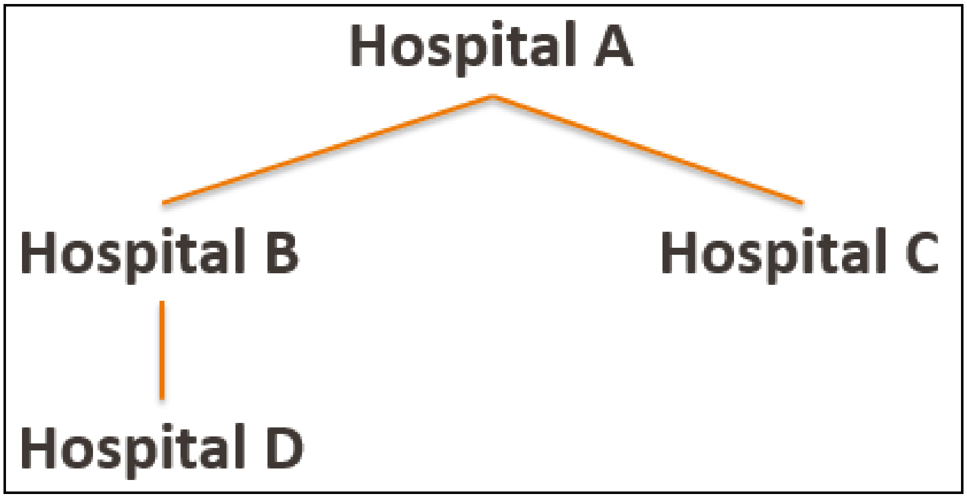
Only a Vocera employee may create a hospital. If your organization has an on-premises Vocera system and you want to have the messaging capabilities of VST, contact Vocera technical support for more information. Administrators of a hospital may both create a practice if it does not exist and also invite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

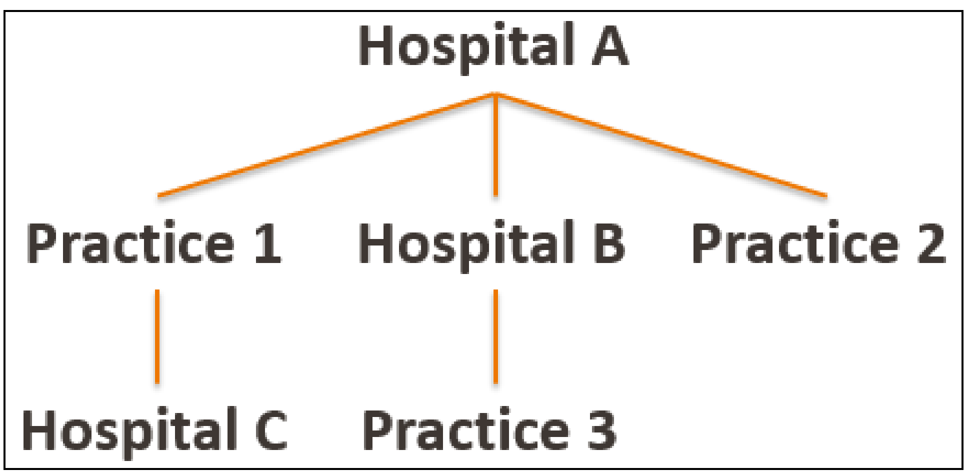


In addition, suppose Hospital D is an affiliate of Hospital B. In this situation, Hospitals A and D are both in the community of Hospital B, so their users are able to communicate with each other as well as with users of Hospital B. However, users in Hospital D and Hospital C are not able to communicate 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 18.

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.

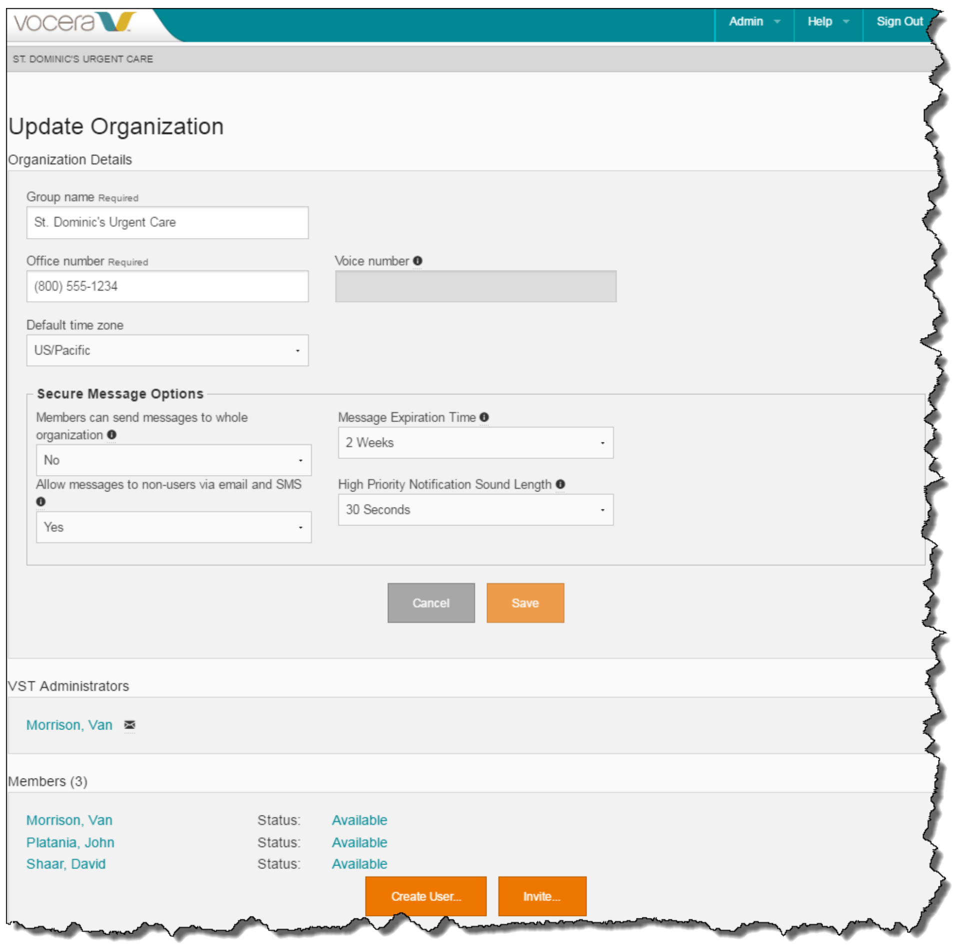
How to Update your Own Organization

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.



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 40 and **Creating Users** on page 46 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 32 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 21 for information about updating your list of affiliated organizations.
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 32.

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 4: 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 Voice Number based on the area code that you entered. If the Office Number has a toll-free area code, a Voice Number is not created. In this situation, use a conventional area code for the Office Number, save the organization, and let the third-party provider assign a number in that area code. Then change the Office Number 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.
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 5: 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 6: 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 7: 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.

Table 8: 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.
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.

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.

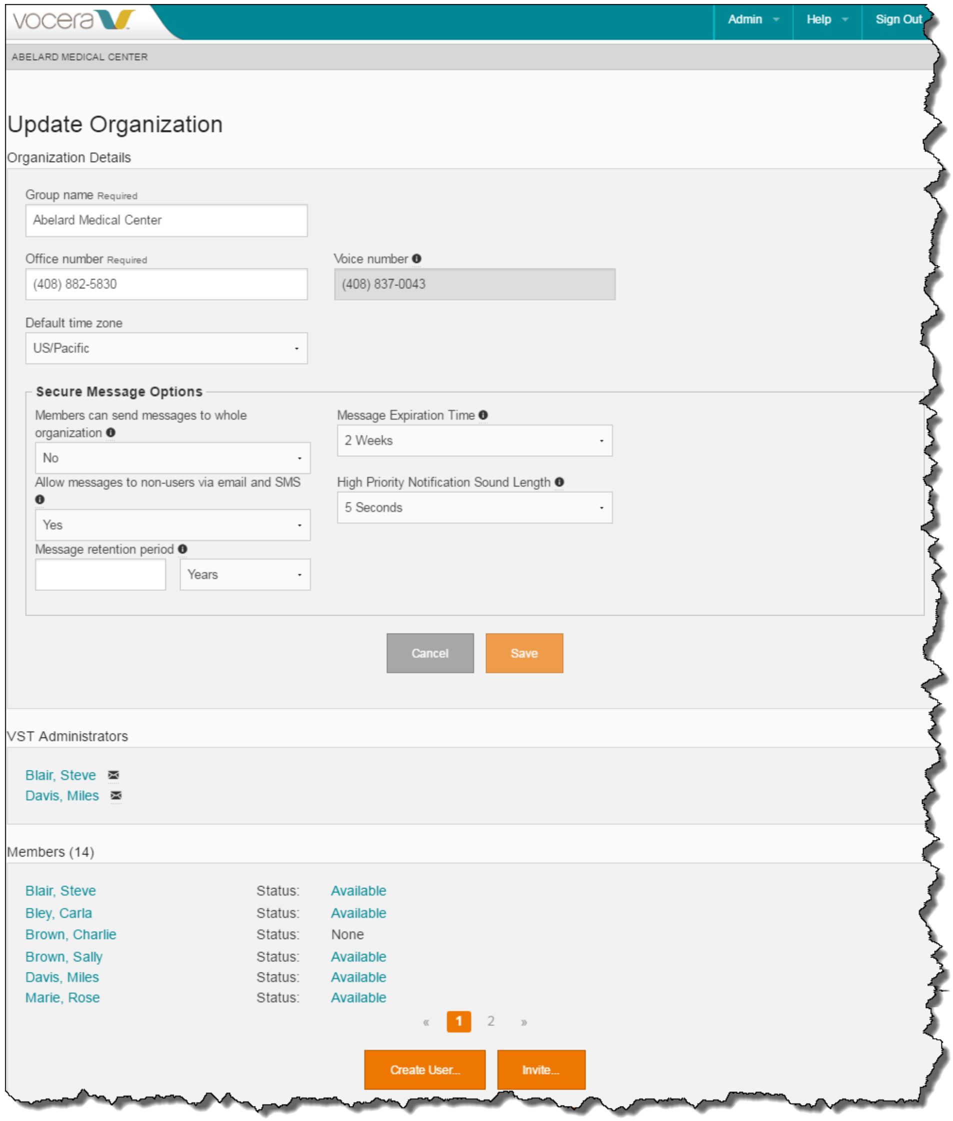
How to Invite an Existing Practice to Join an Organization

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:

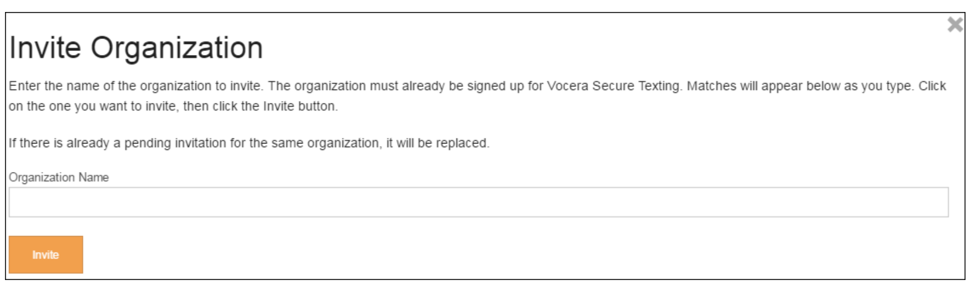
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



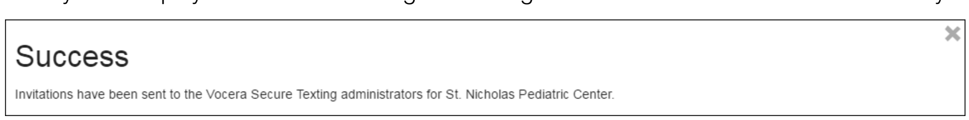
2. In the Organizations with whom we can communicate section, click Invite Existing Organization.

   The Invite Organization dialog box appears.



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

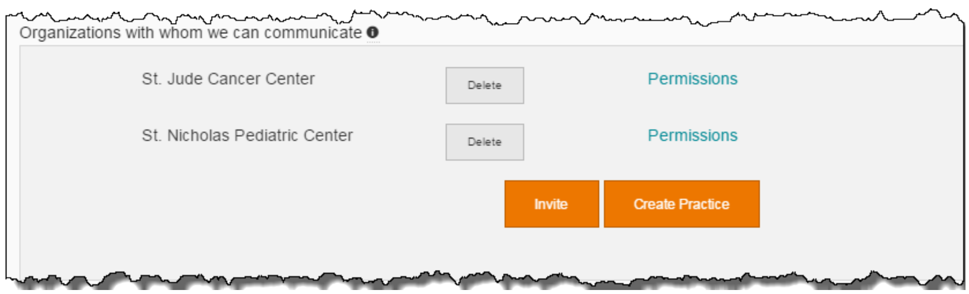
   The system displays a Success message indicating that the invitation was sent successfully.



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 23 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 26.

Responding to Invitations

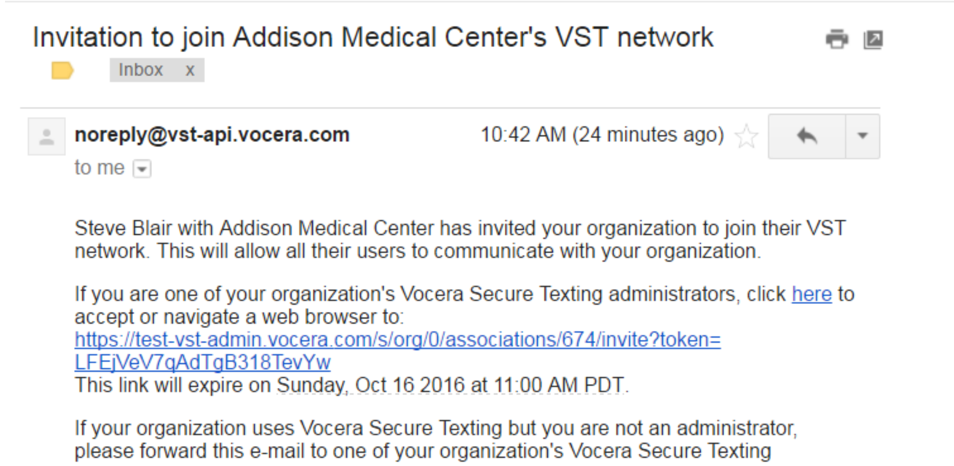
As a VST administrator, you will not only invite your affiliates to communicate with you, you will also respond to invitations from affiliates to communicate with them. When you respond to an invitation, you can allow all your members to communicate with an affiliate, or you can restrict the communication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

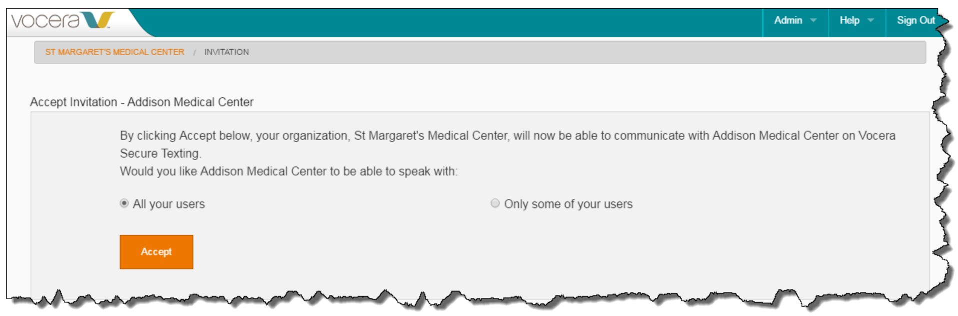
1. Open the invitation email you received.



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 10.

   The Invitation page appears.



3. Select All your users to allow all your users to communicate with the affiliated organization.
4. 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.

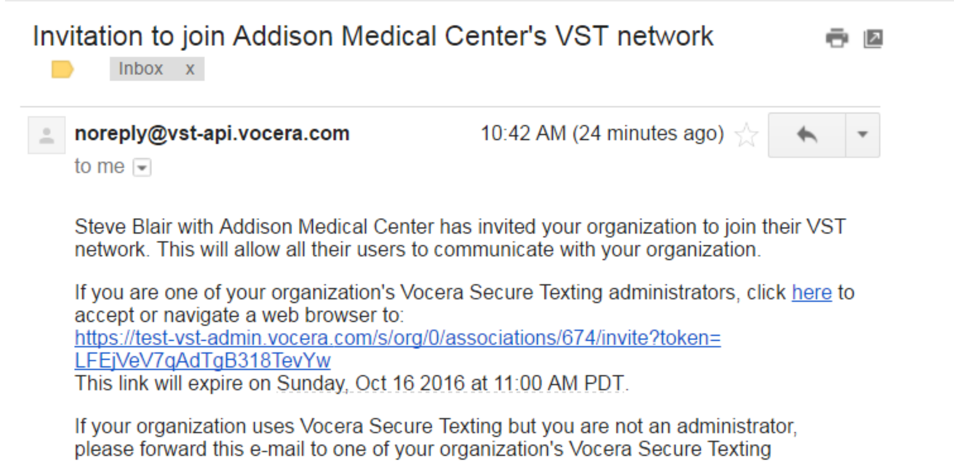
At this time, members of two organizations can communicate with each other, and they appear as contacts in each other's VST clients.

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:

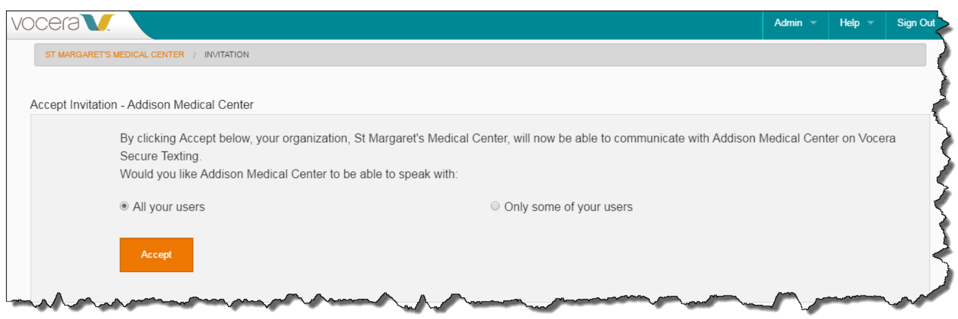
1. Open the invitation email you received.



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

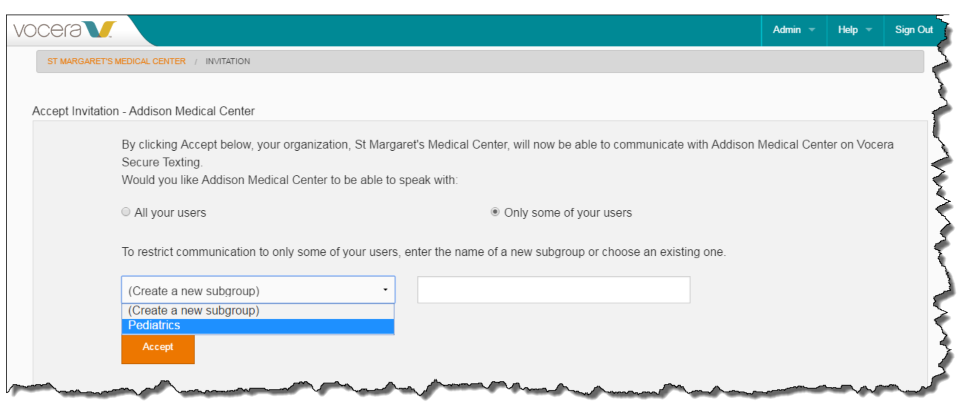
   If you are not logged into the Vocera Secure Texting Administration Console, the Login page appears. Log in as described at **How to Log Into the VST Administration Console** on page 10.

   The Invitation page appears.



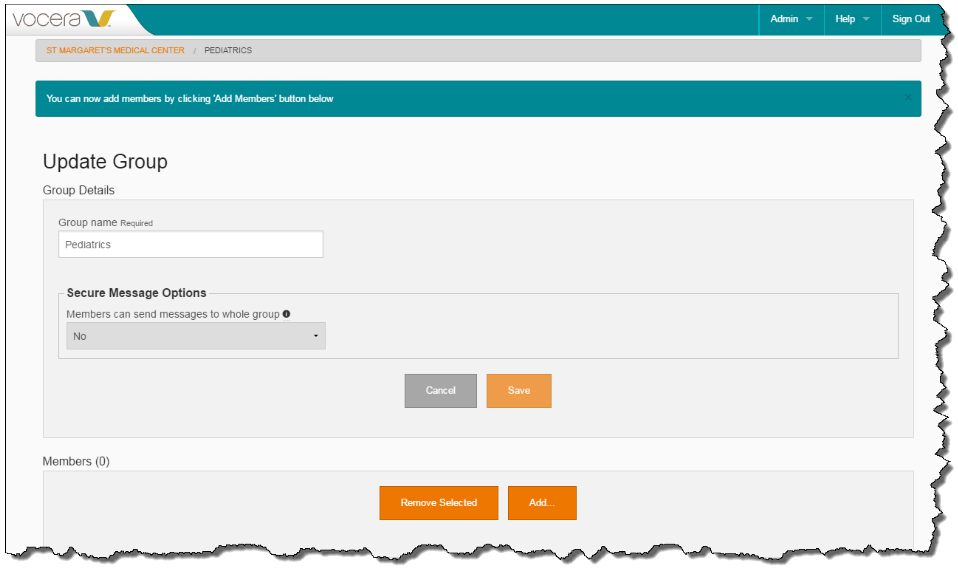
3. Select Only some of your users to allow a subset of your users to communicate with the affiliated organization.

   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.



5. Add users who need to communicate with the affiliate to the group. See **How to Manage Membership in a Group** on page 38.
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.

   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.

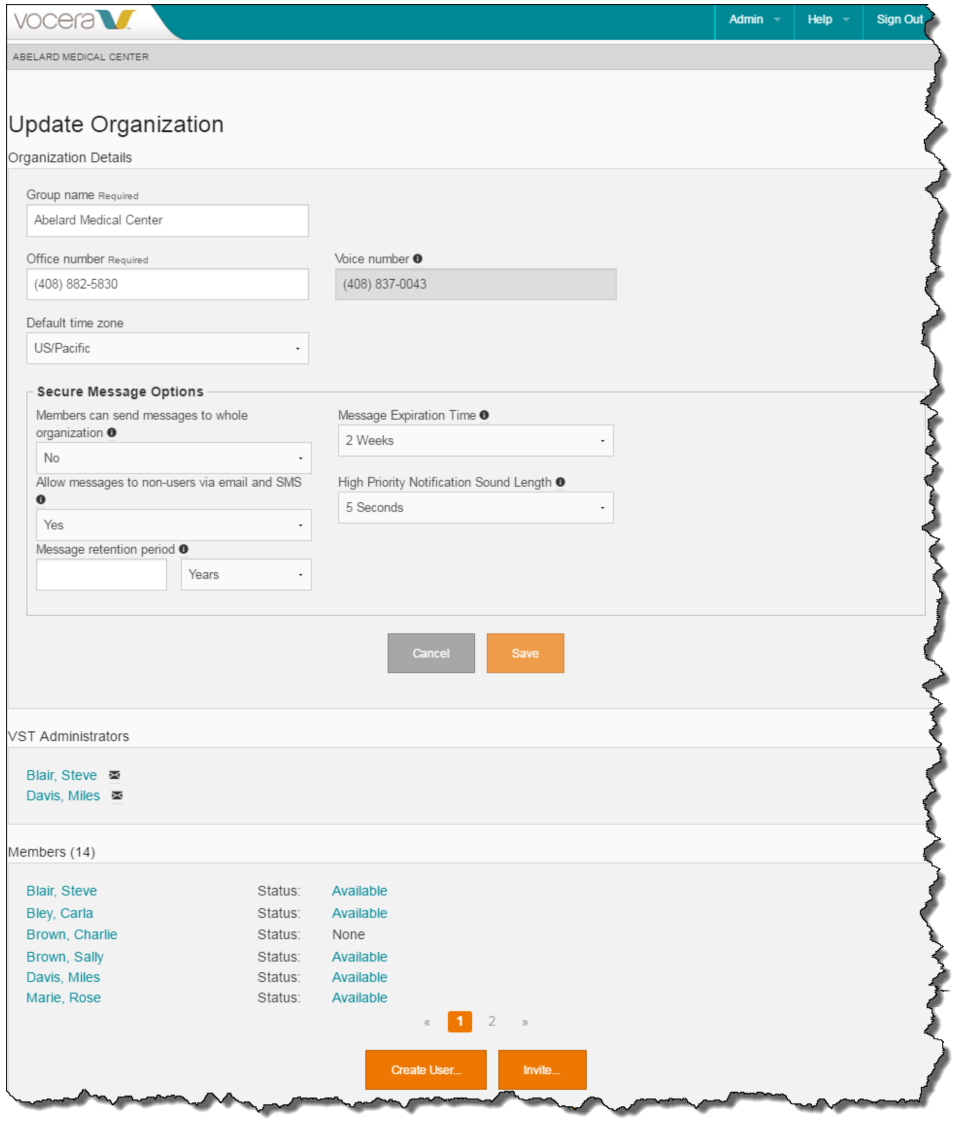
How to Limit Communication with an Affiliate

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:

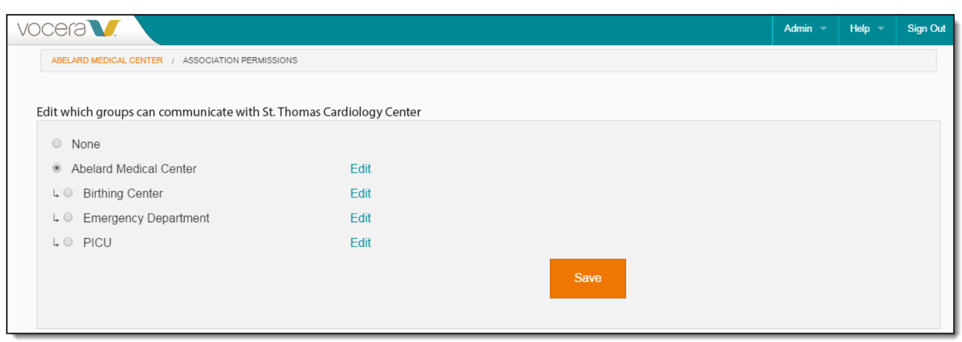
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



2. 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.



3. 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 32.

- 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 9: 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

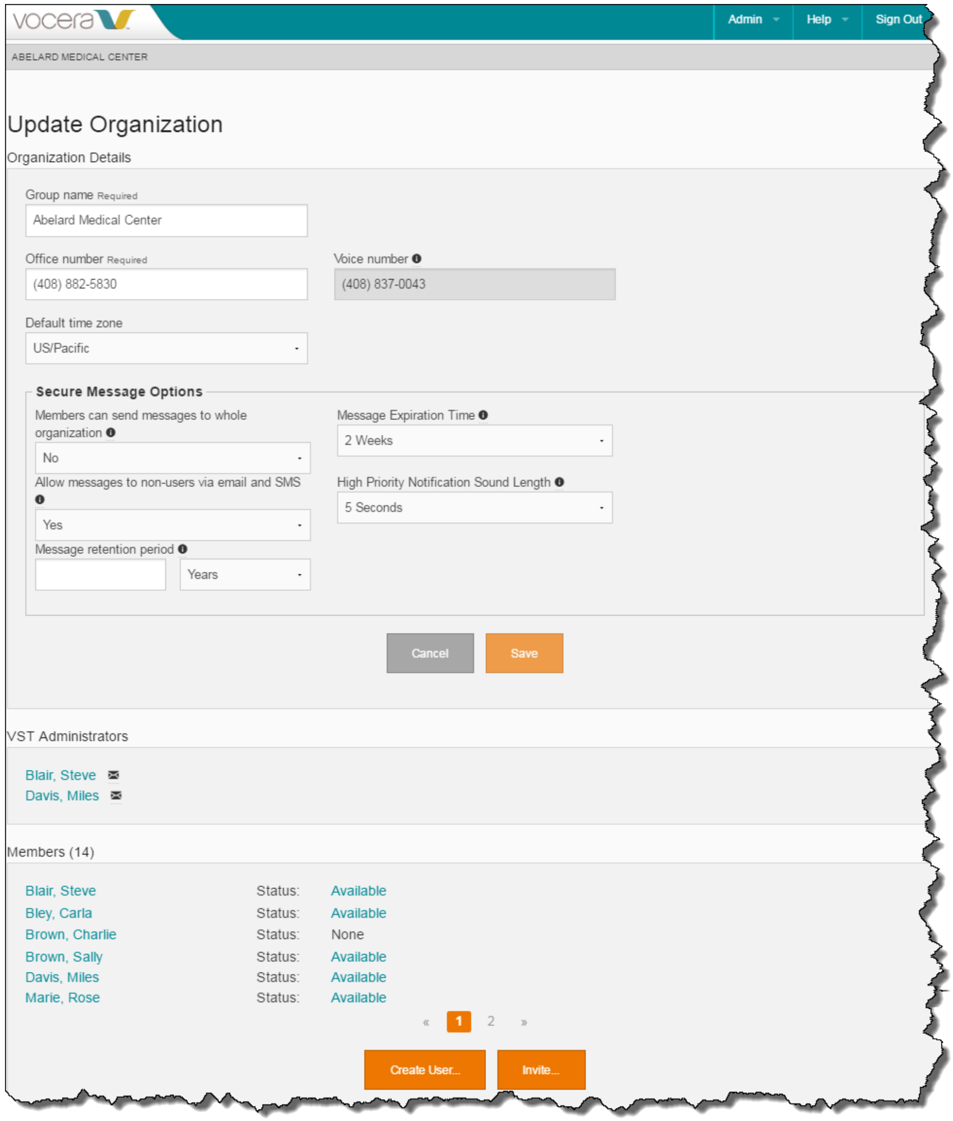
If necessary for any reason, you can end communication with an affiliate that you have already been communicating with. When you end communication temporarily, the organization remains an affiliate but no members have permission to communicate; when you end communication permanently, the organization 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.

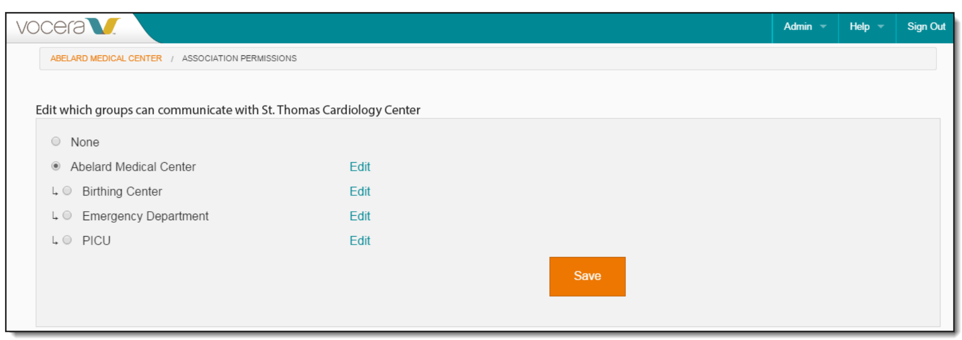
To temporarily stop members of another organization from contacting your own members:

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.



2. 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.



3. Select None, and then choose Save.

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

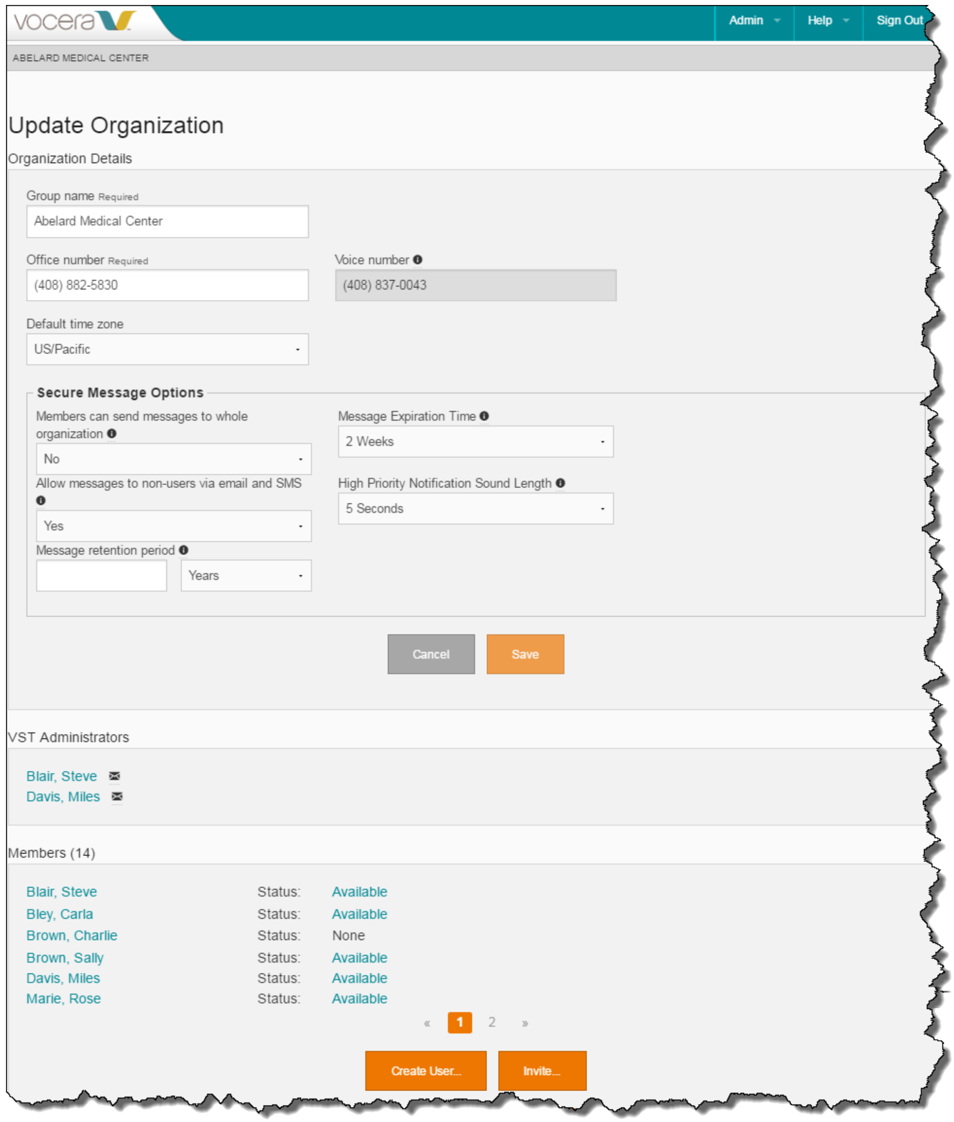
How to End Communication with a Practice Permanently

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:

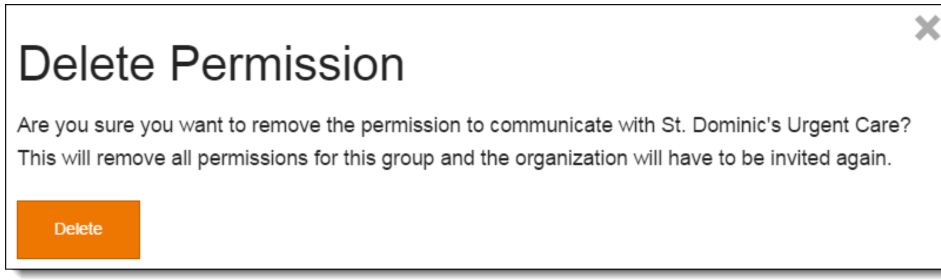
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



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.

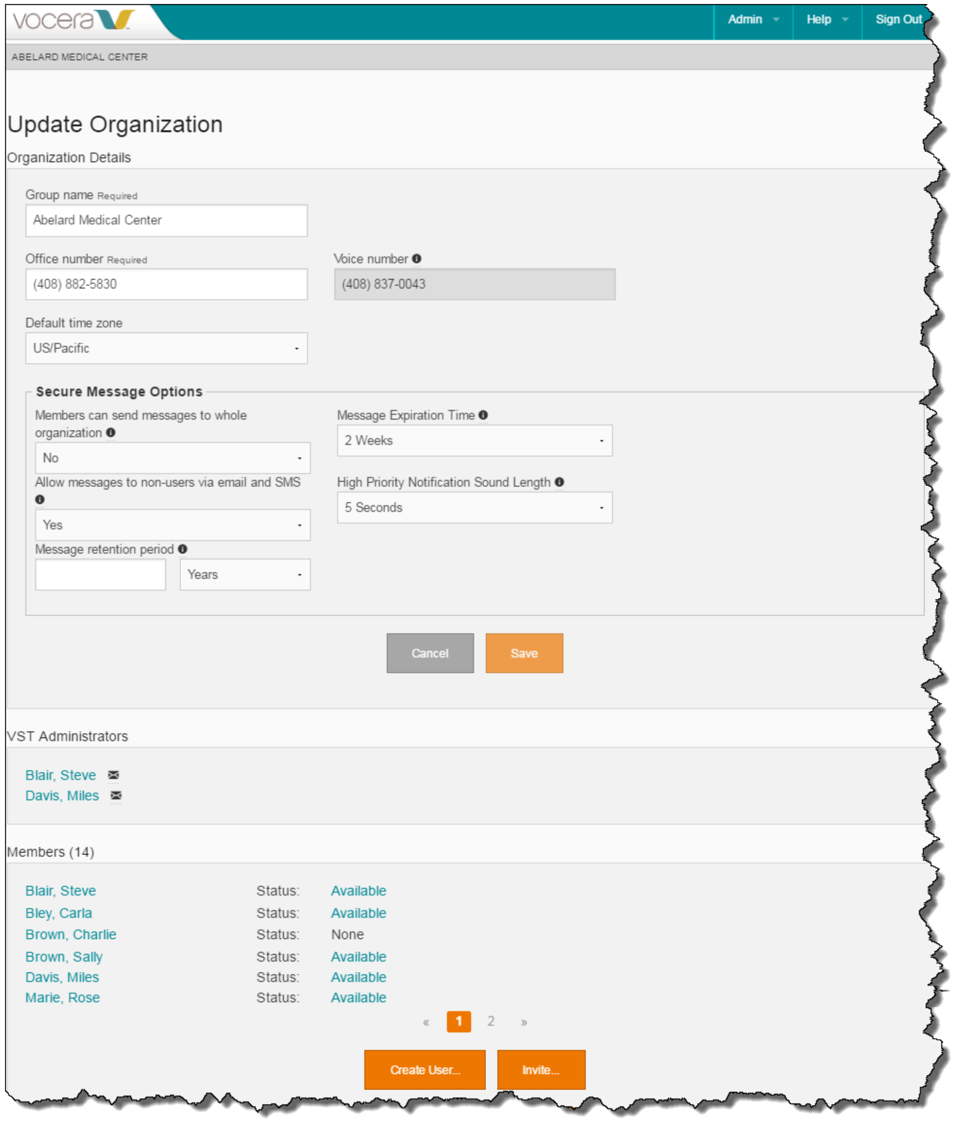
How to Create Groups in the Administration Console

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:

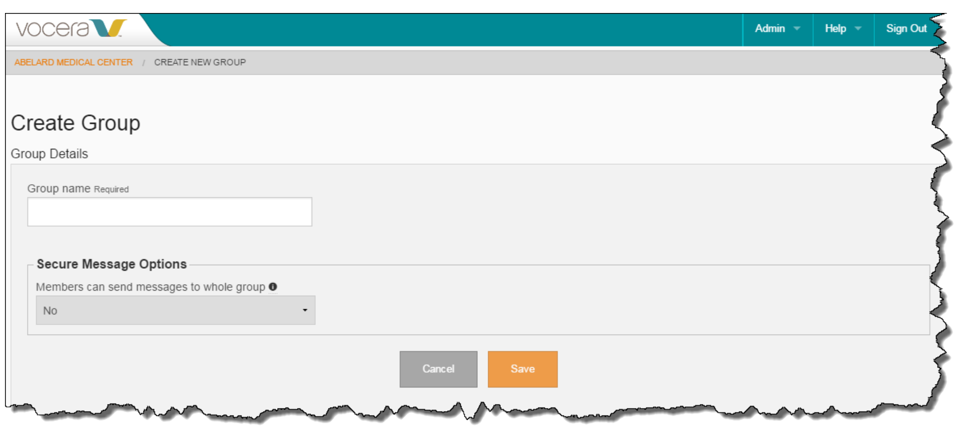
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



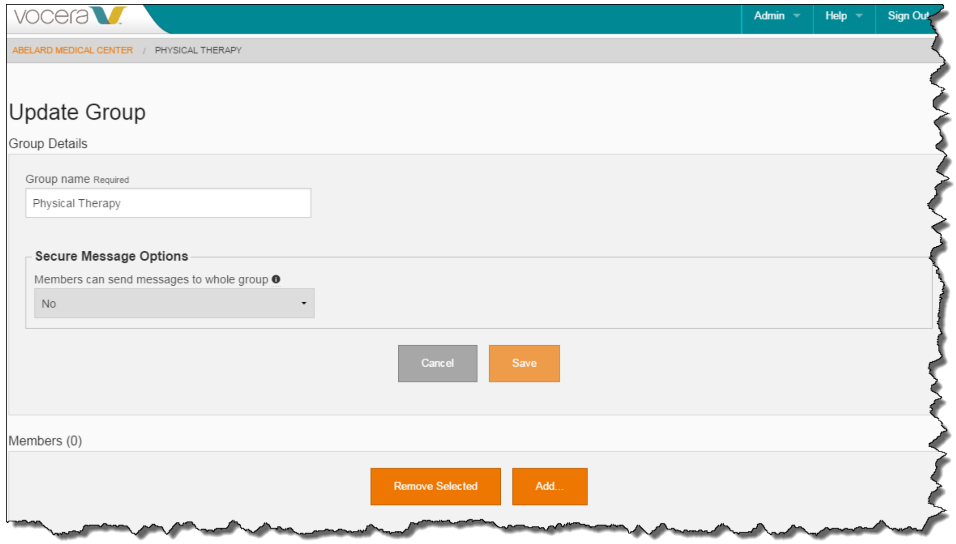
2. In the Sub groups section, click Create New Group.

   The Create Group page appears.



3. Enter the group details as described in **Create Group Page Reference** on page 34 and click Save.

   The group is created and the Update Group page appears.



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 38. You can also set permissions to restrict communication with other organizations. See How to Limit Communication with an Affiliate on page 26.

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 10: 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.

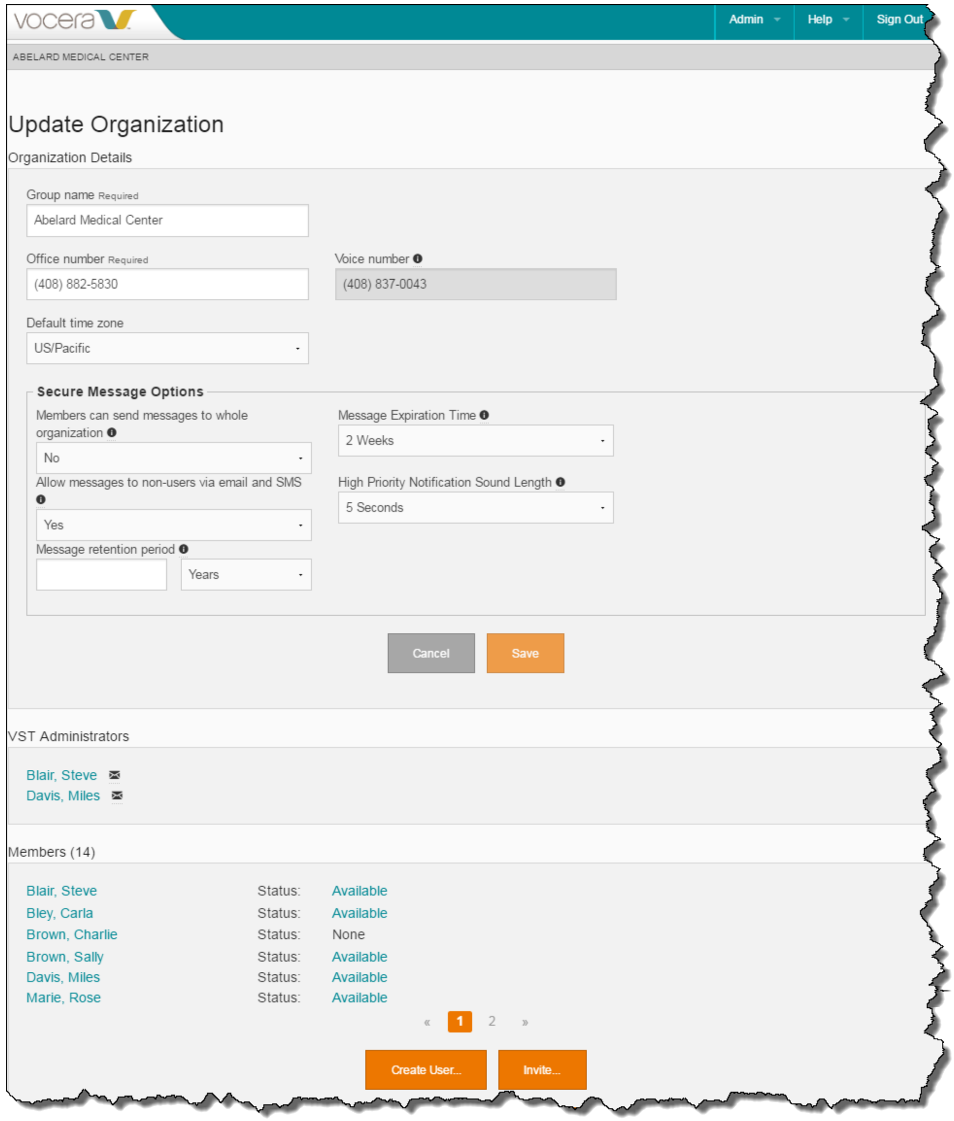
How to Create Groups by Importing a Spreadsheet

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:

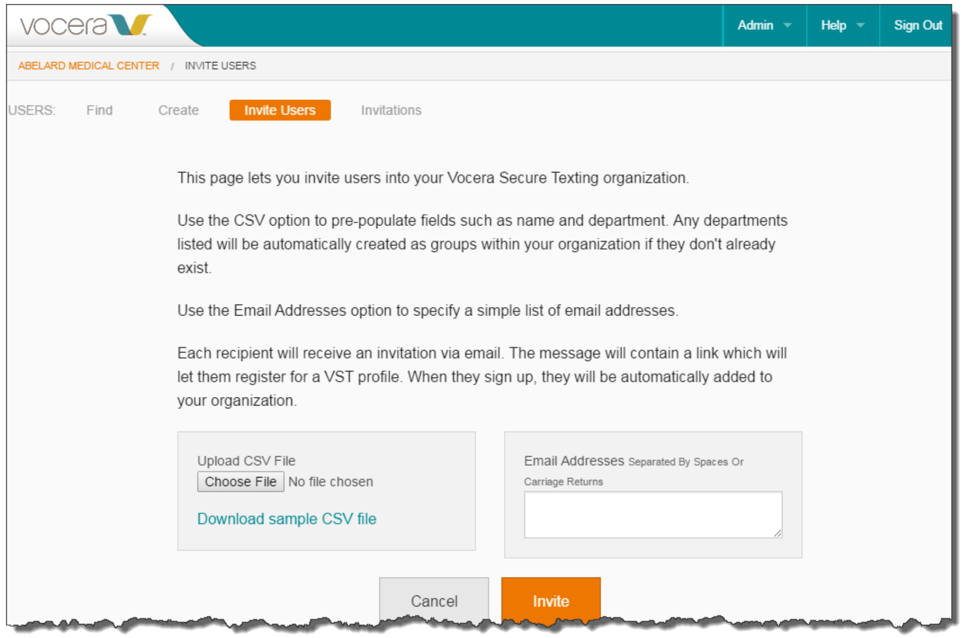
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



2. In the Members section, click the Invite button.

   The Invite Users page appears.



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.

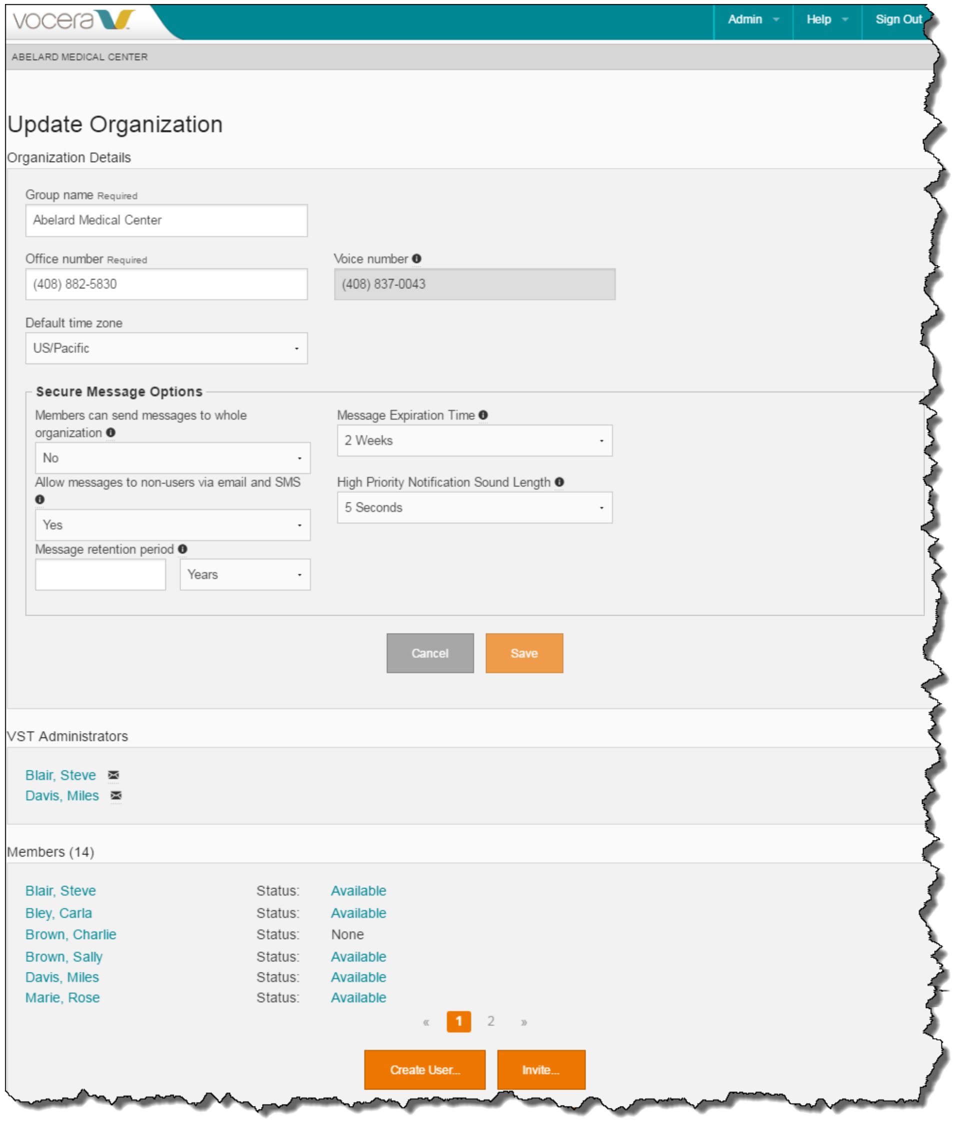
How to Update a Group

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

To update a group:

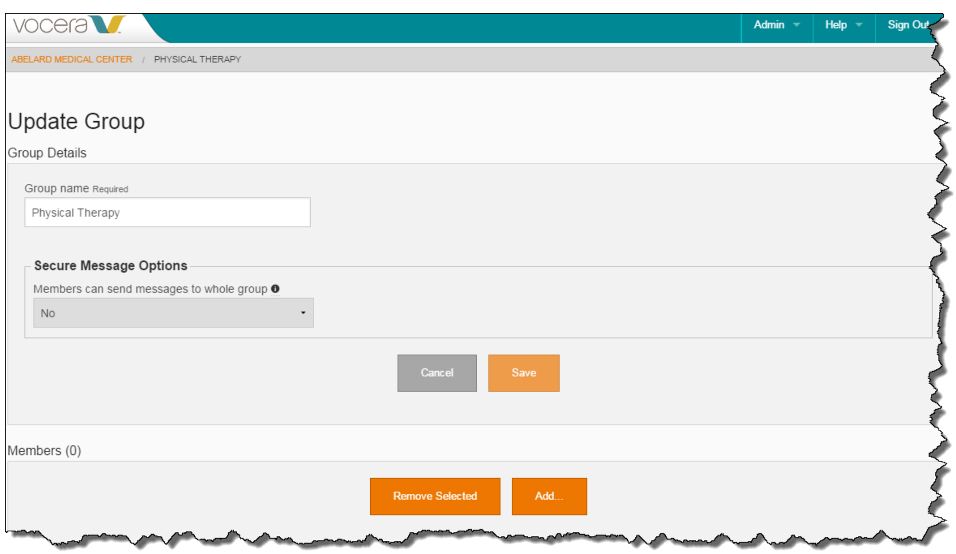
1. If you are not on the Update Organization page, navigate to it by selecting Admin > Edit Organization from the menu at the top right of any page.

   The Update Organization page appears.



2. In the Sub Groups section, click the Edit link to the right of the group you want to update.

   The Update Group page appears.



3. If necessary, update the membership in the group as described in **How to Manage Membership in a Group** on page 38.
4. If necessary, update the details as described in **Update Group Page Reference** on page 38 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 11: Group Details

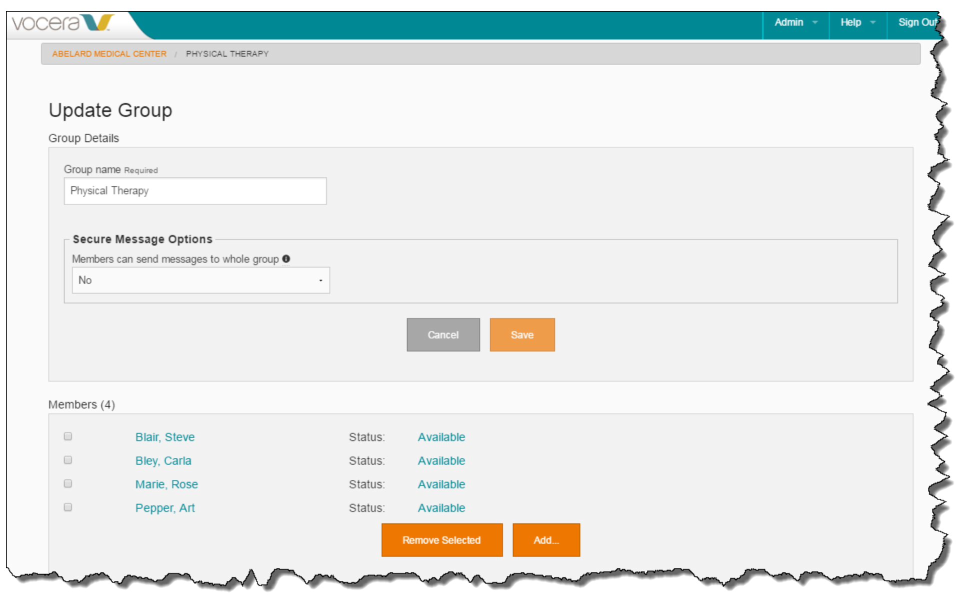
Field	Description
Group Name	The name of the group, specified using any combination of letters and numbers.
Members allowed to send messages to whole group	Specifies whether members of the parent organization are allowed to send messages to this group. If you set this value to Yes, the group appears 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 36.
2. If you want to remove members from the group, check their names in the Members section and click Remove Selected.

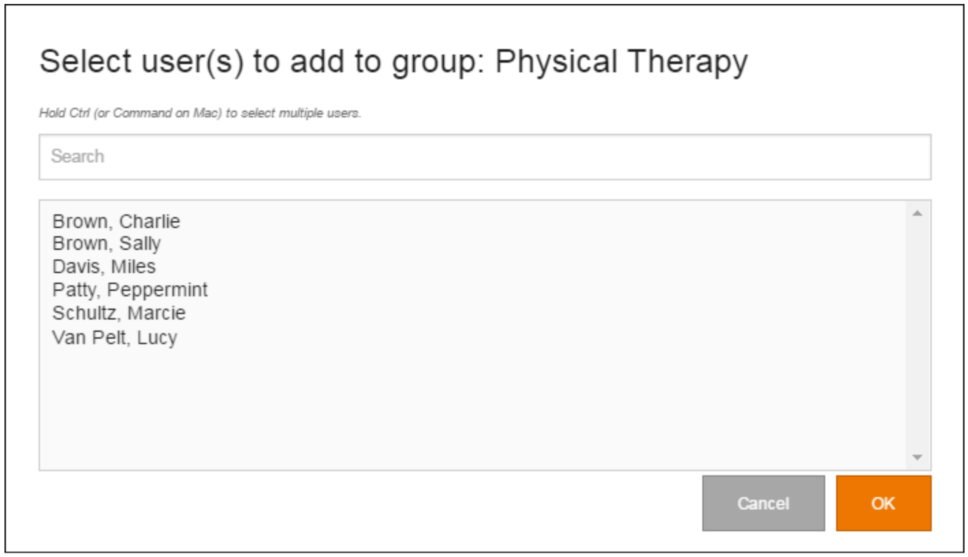


   The Update Group page removes the members from the list.

3. If you want to add members to the group, do the following:

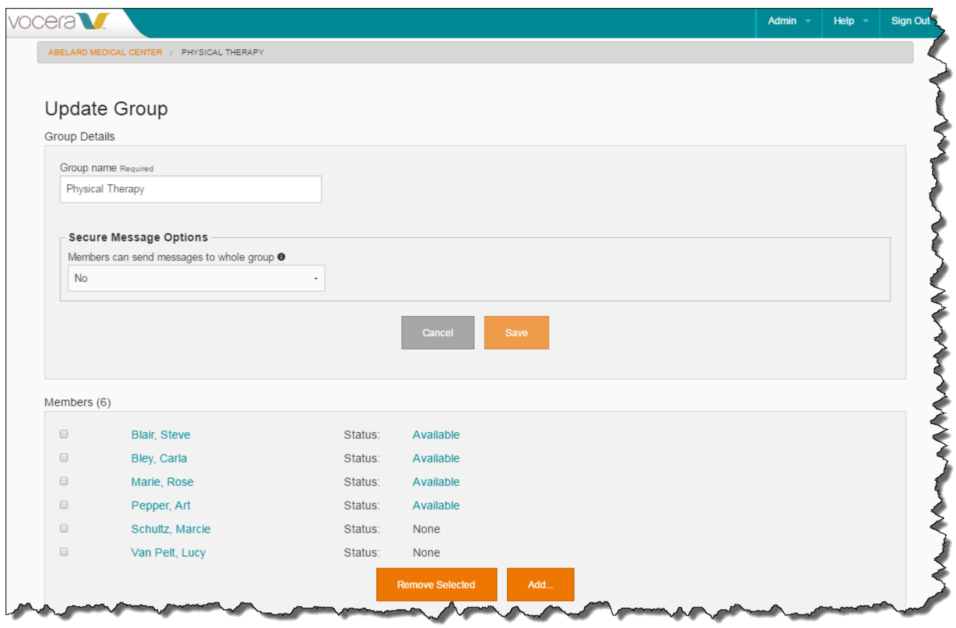
   a. In the Members section of the Update Group page, click Add.

      The Select users to add to group page appears.



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.



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 12: 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.

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.

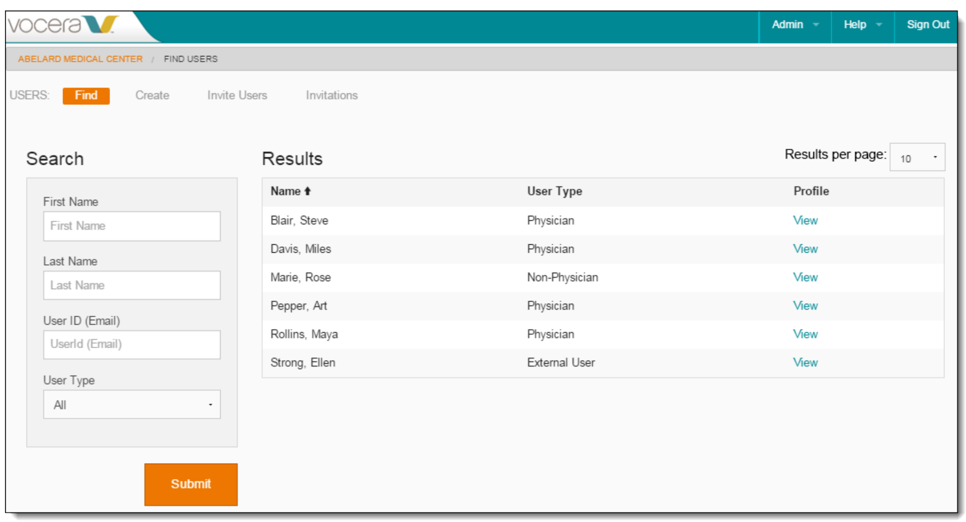
How to Invite a User

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:

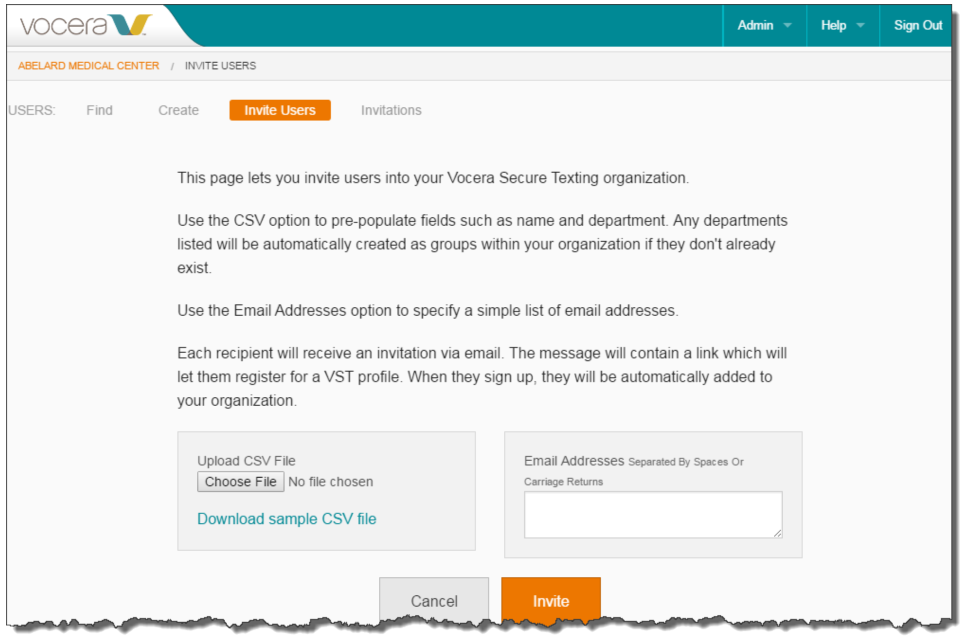
1. From any page in the VST Administration Console, select Admin > Manage Users from the menu on the top right.

   The Find Users page appears.



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

   The Invite Users page appears.



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 Consolewill 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 49.

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 13: 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.

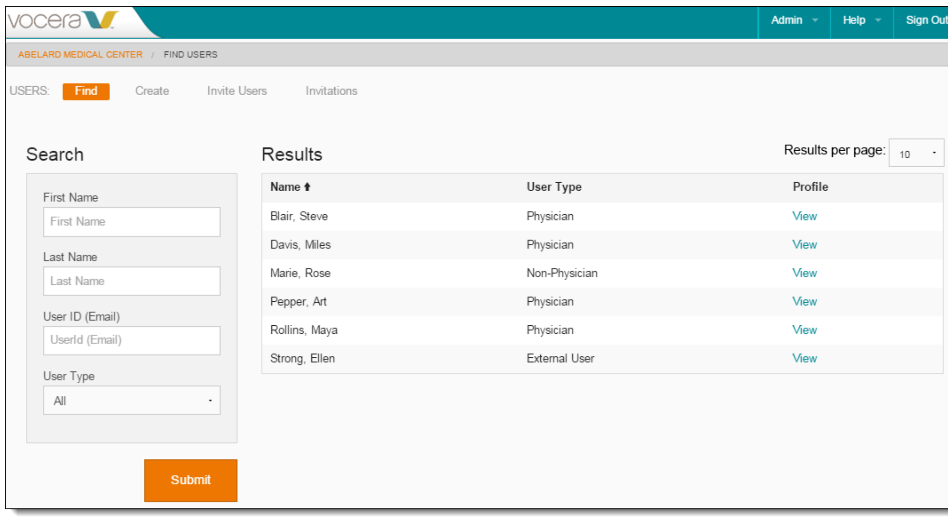
How to View Invitation Status

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:

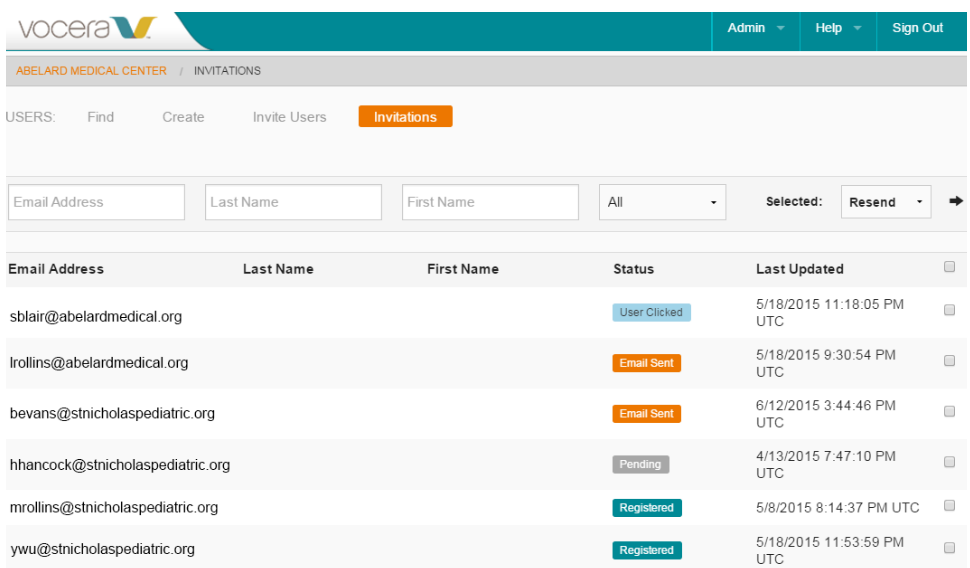
1. From any page in the VST Administration Console, select Admin > Manage Users from the menu on the top right.

   The Find Users page appears.



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. The Last Updated column shows the date and time that the invitation's status most recently changed.

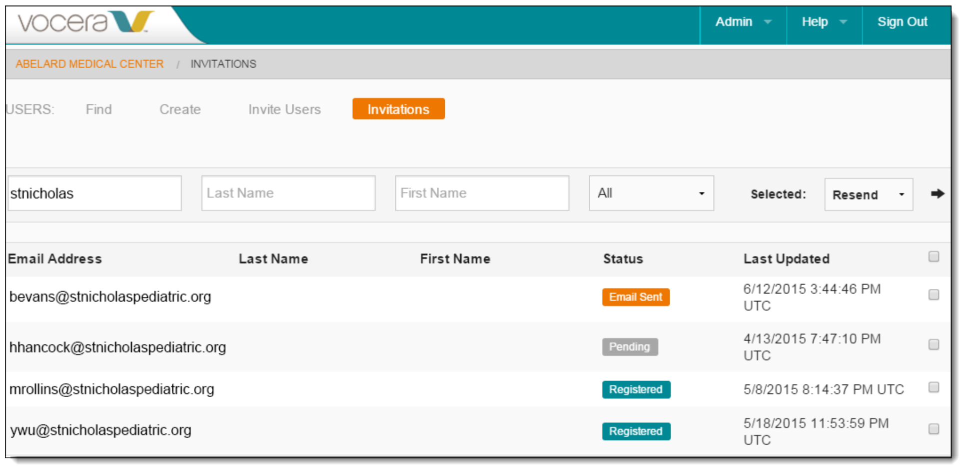


   Following are the definitions of each possible message status:

- 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.

3. 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.



   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".

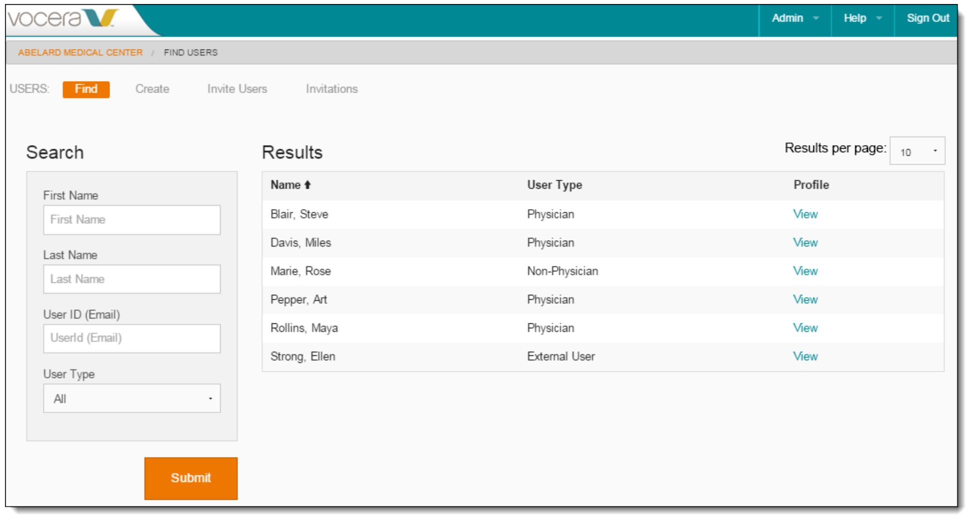
How to Resend an Invitation

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, of if you suspect that it was not delivered.

To resend a VST invitation:

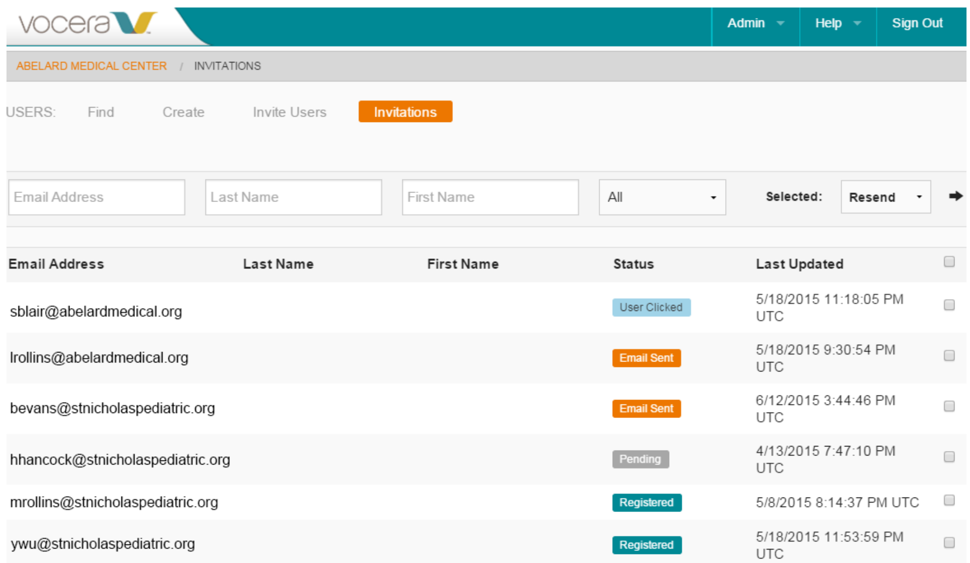
1. From any page in the VST Administration Console, select Admin > Manage Users from the menu on the top right.

   The Find Users page appears.



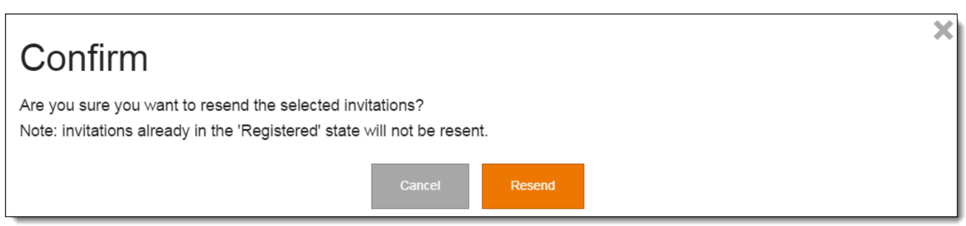
2. Select the Invitations link at the top of the Find Users page.

   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 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.



5. Click Resend.

   The system sends a new invitation to each selected user.

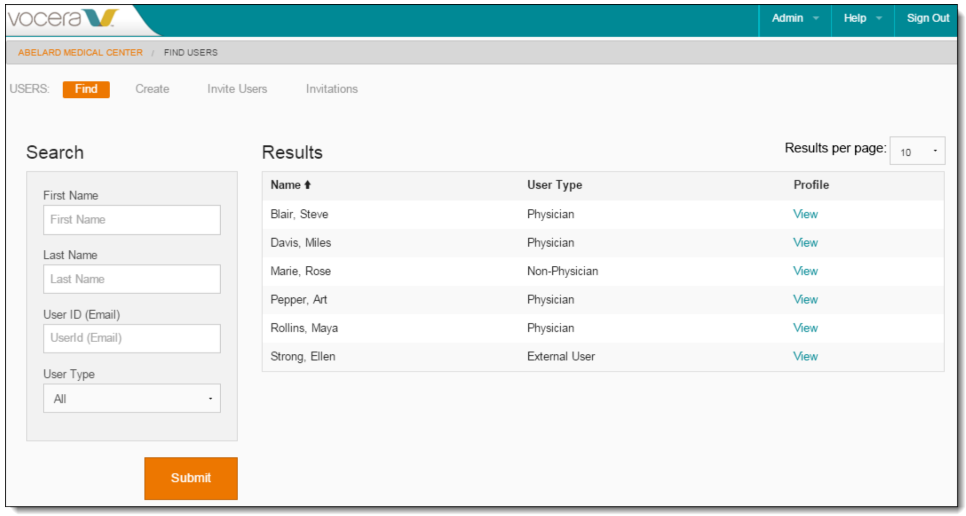
How to Delete an Invitation

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:

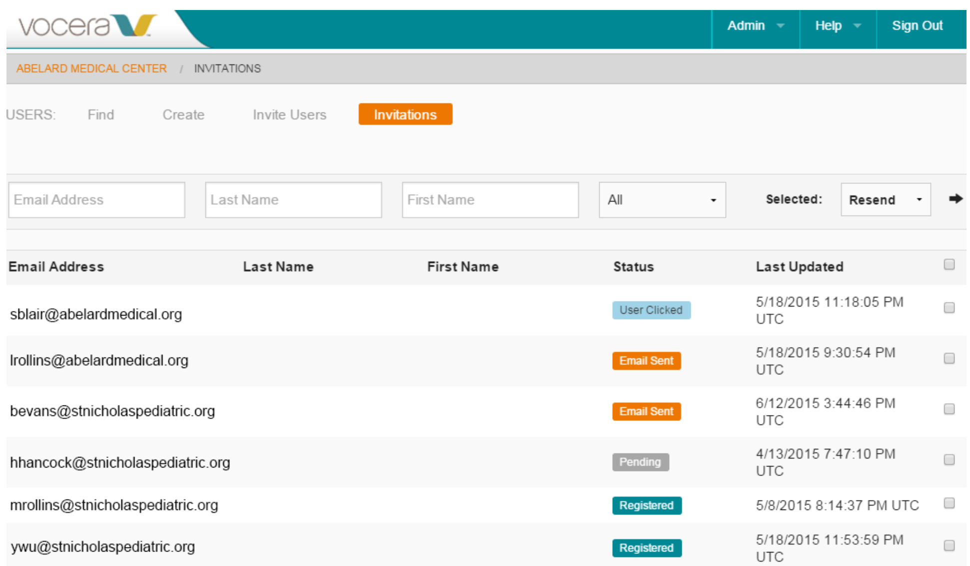
1. From any page in the VST Administration Console, select Admin > Manage Users from the menu on the top right.

   The Find Users page appears.



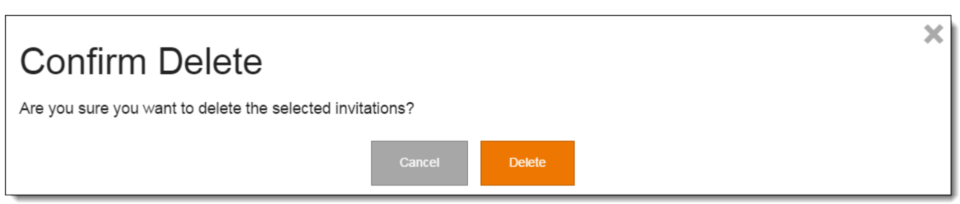
2. Select the Invitations link at the top of the Find Users page.

   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 14: 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	The status of the invitation, defined as follows: • 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

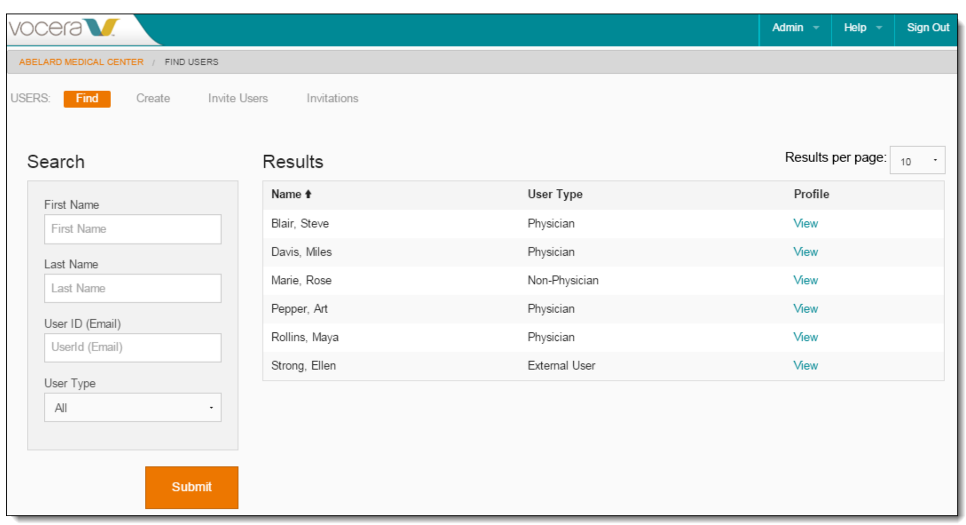
Unlike inviting a user, creating a user creates the user account in the database immediately, and provides additional control by allowing you to fill out the user profile more completely. However, you still need to send the users an invitation so they can register.

How to Create a User

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

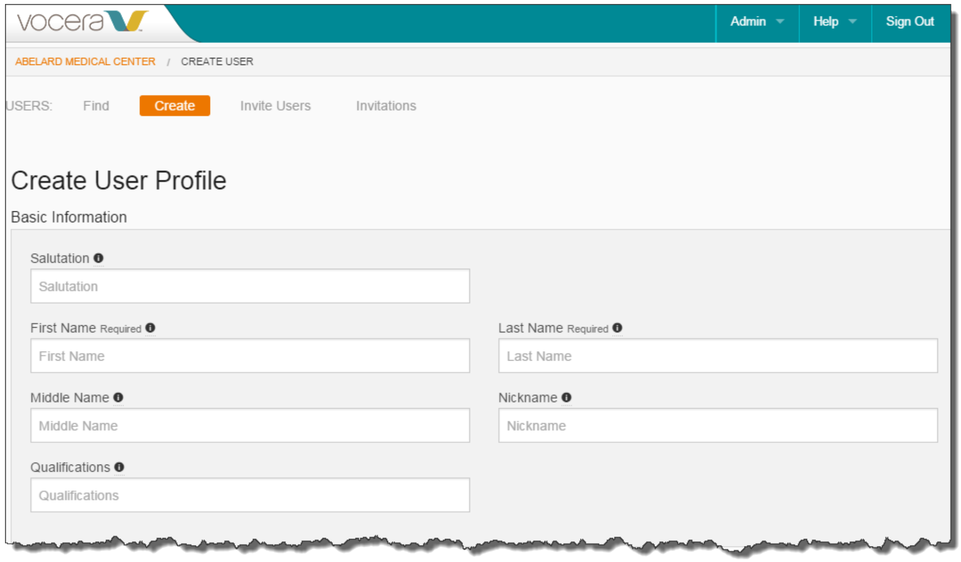
To create a user profile for VST:

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.



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

The Create User Profile page appears.



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 47.

Create User Profile Page Reference

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

Table 15: 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 16: 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 17: 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 18: User Type

Field	Description
Staff Type	The type of staff member. This is usually set to Physician. 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.

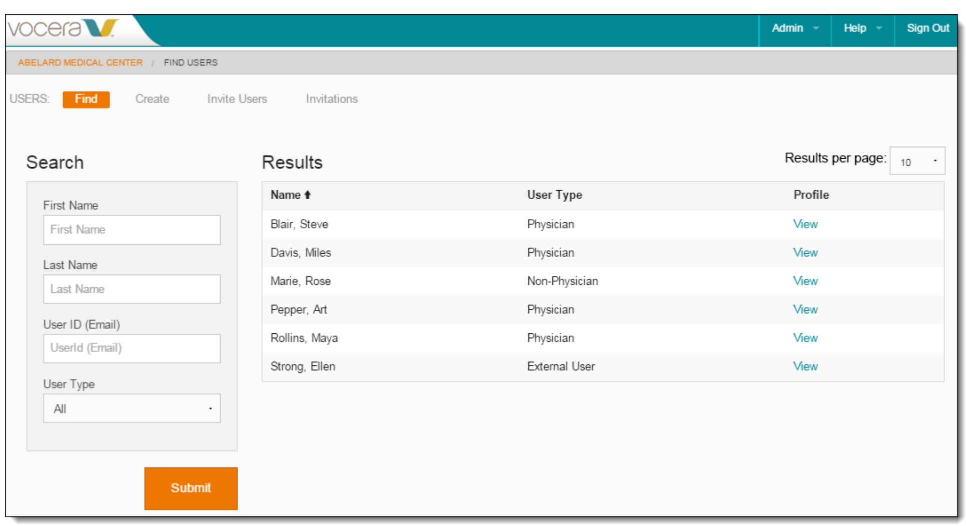
How to Find a User

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.



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.

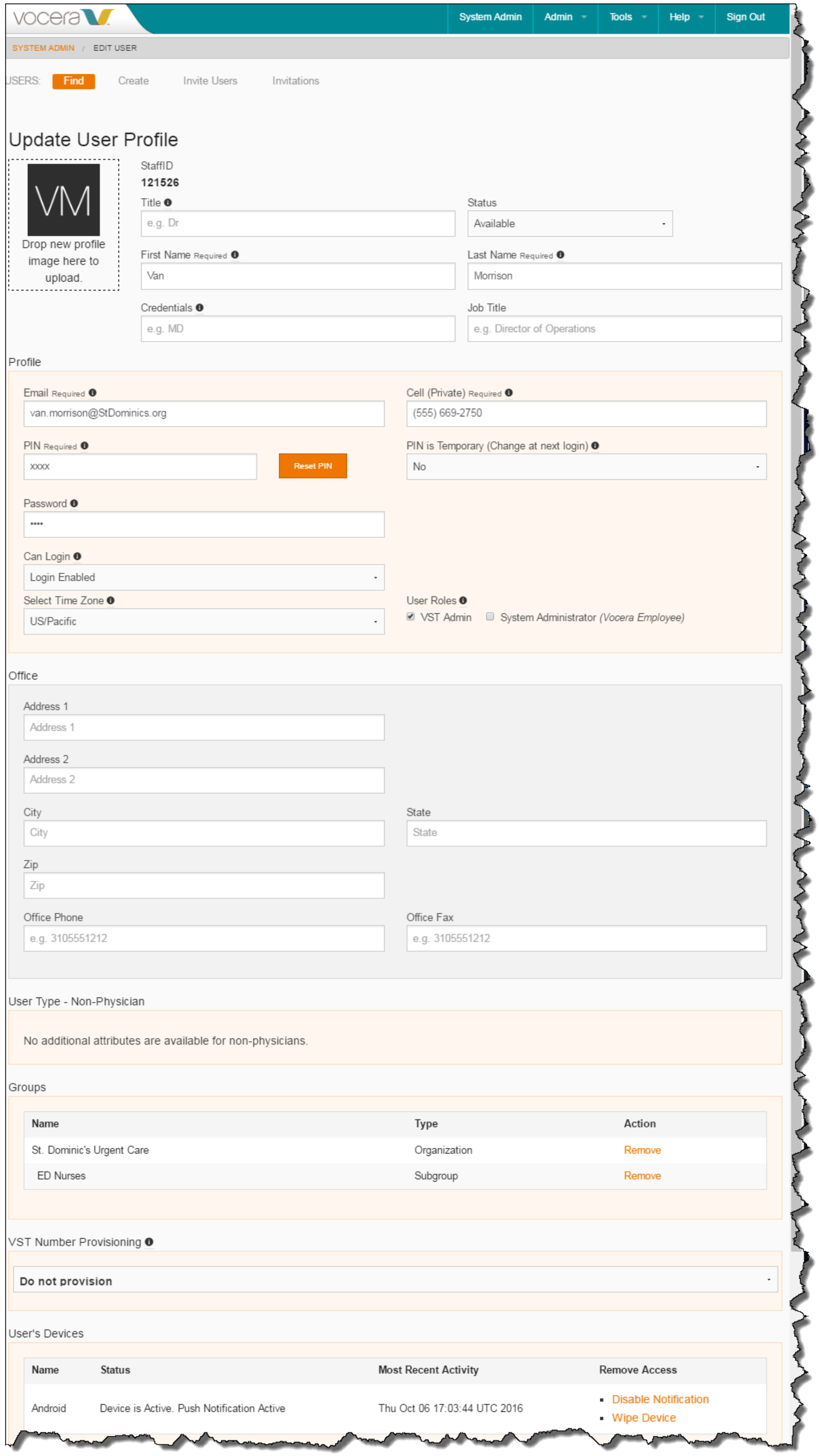
How to Update a User Profile

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 48.
2. To the right of the user's name, click the View link.

   The profile for that user is displayed.



3. 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 51.
4. 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 19: 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 None, Available, Busy, or Unavailable. The default is Available.
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 20: 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 VST Admin if the user is an administrator for this organization. Otherwise, leave this entry unchecked.

Table 21: 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 LoggedIn, LoggedOut, or DND 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 LoggedIn or LoggedOut 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 22: 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 23: 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 24: Groups

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

Table 25: User's Devices

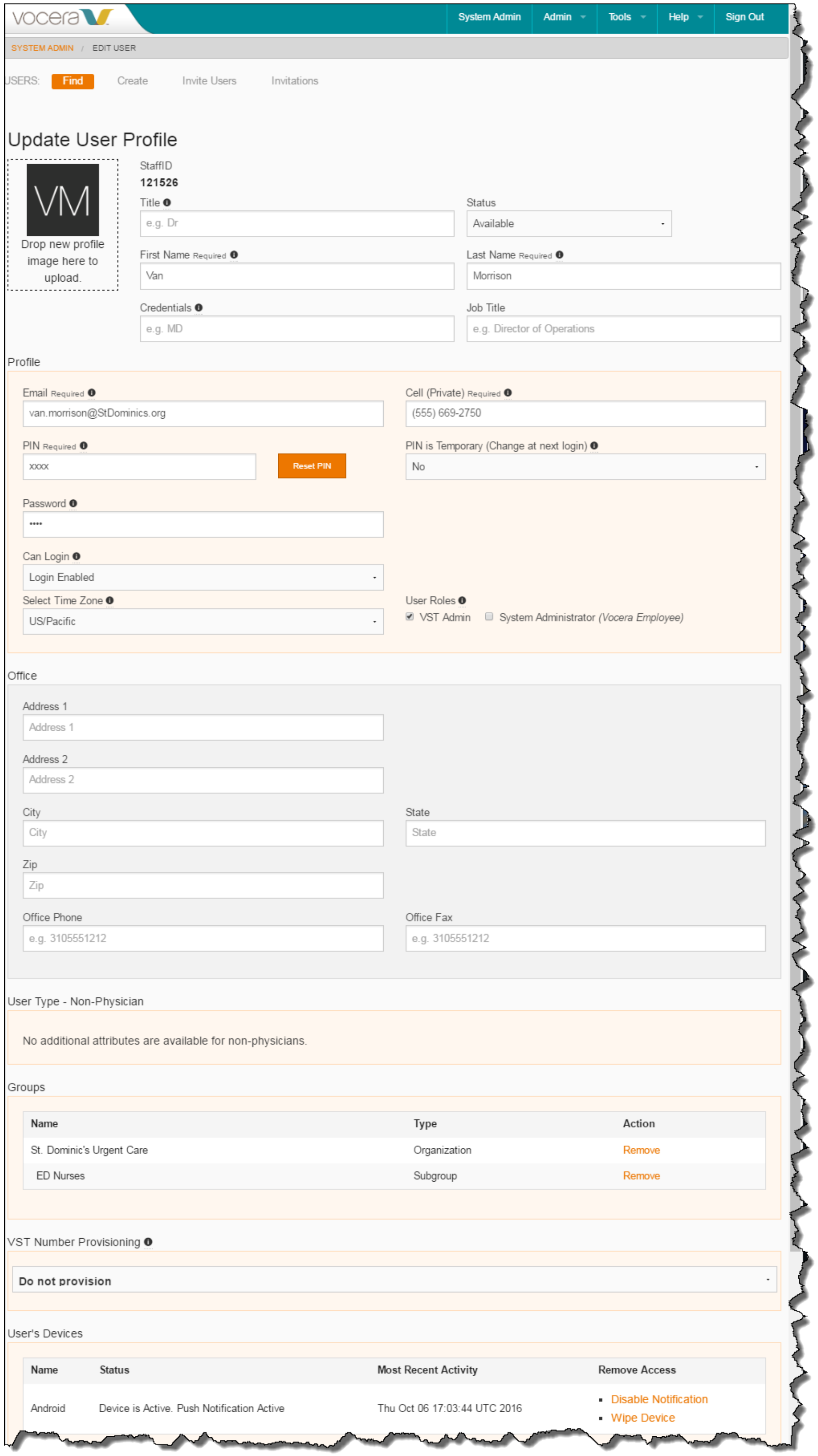
Field	Description
Name	The device name assigned by the user.
Status	Provides status information about the user's device, such as whether it is logged out or active. If the user has never logged into the VST handheld client, the device is considered logged out; after a user has logged in for the first 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. • Disable Notification prevents the device from receiving mobile push notifications. After clicking this link, the Status column displays "Device is active. Push notifications not active." and the Remove Access column displays Enable Notification. • Enable Notification allows the device to receive mobile push notifications. After clicking this link, the Status column displays "Device is active. Push notification active." and the Remove Access column displays Disable Notification. • Wipe Device removes VST data from the mobile device and logs the user out. After clicking this link, the Status column displays "Remote wipe requested." and the Remove Access column displays Delete Device Info. • Delete Device Info appears only when a user's device has been wiped. The command removes the device from the list in the User's Devices section of the Update User Profile page.

How to Reset a PIN

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

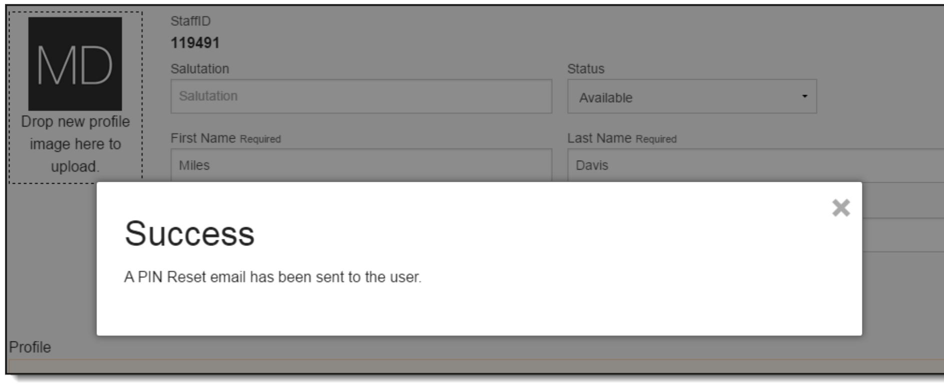
To reset a user PIN:

1. Locate the user whose profile you want to edit. See **How to Find a User** on page 48.
2. To the right of the user's name, click the View link.
   The profile for that user is displayed.



3. Click Reset PIN.

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



4. close the Success message dialog box.

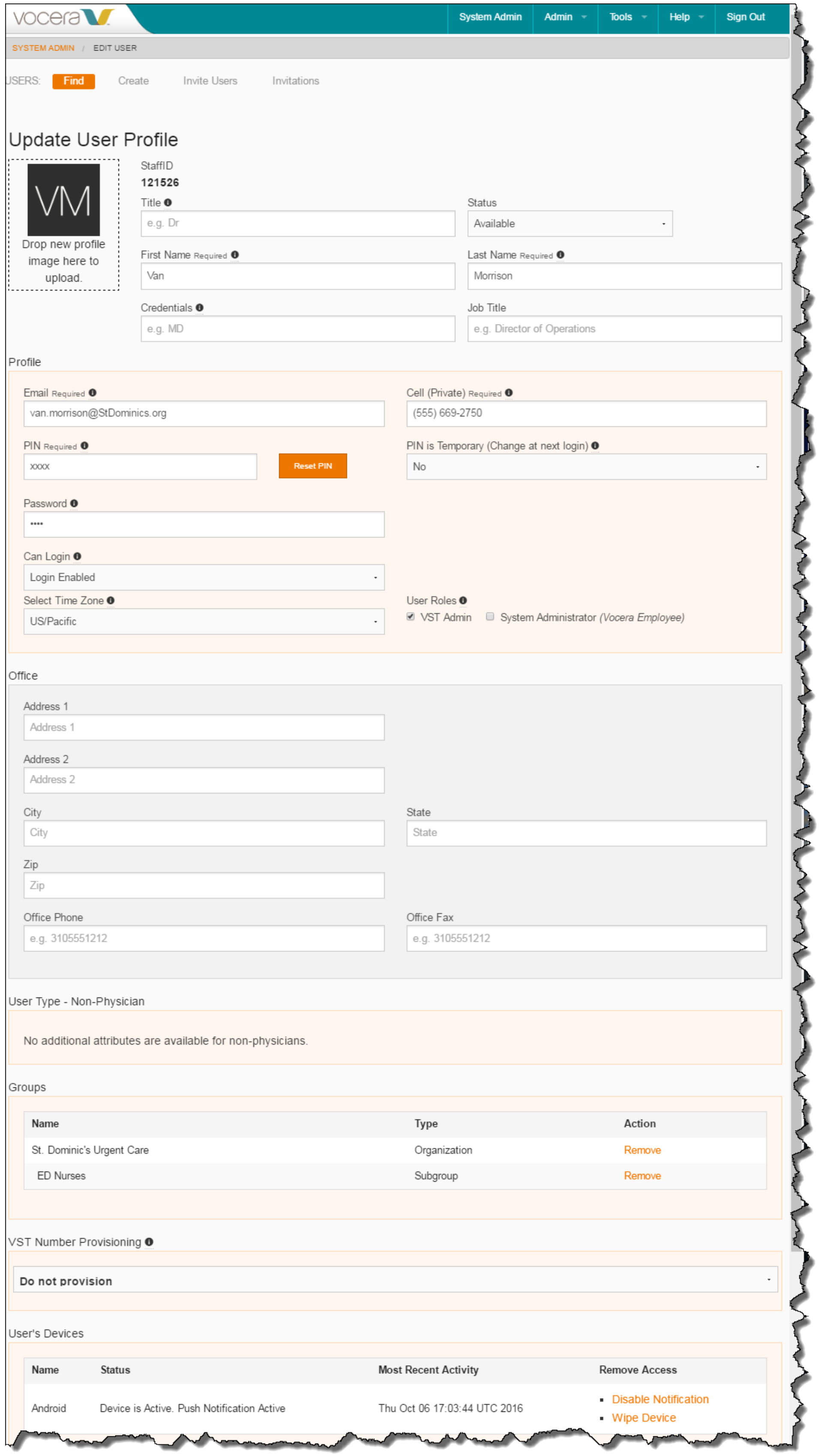
How to Change a PIN

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:

1. Locate the user whose profile you want to edit. See **How to Find a User** on page 48.
2. To the right of the user's name, click the View link.

   The profile for that user is displayed.



3. Enter the new PIN in the PIN field.
4. 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.

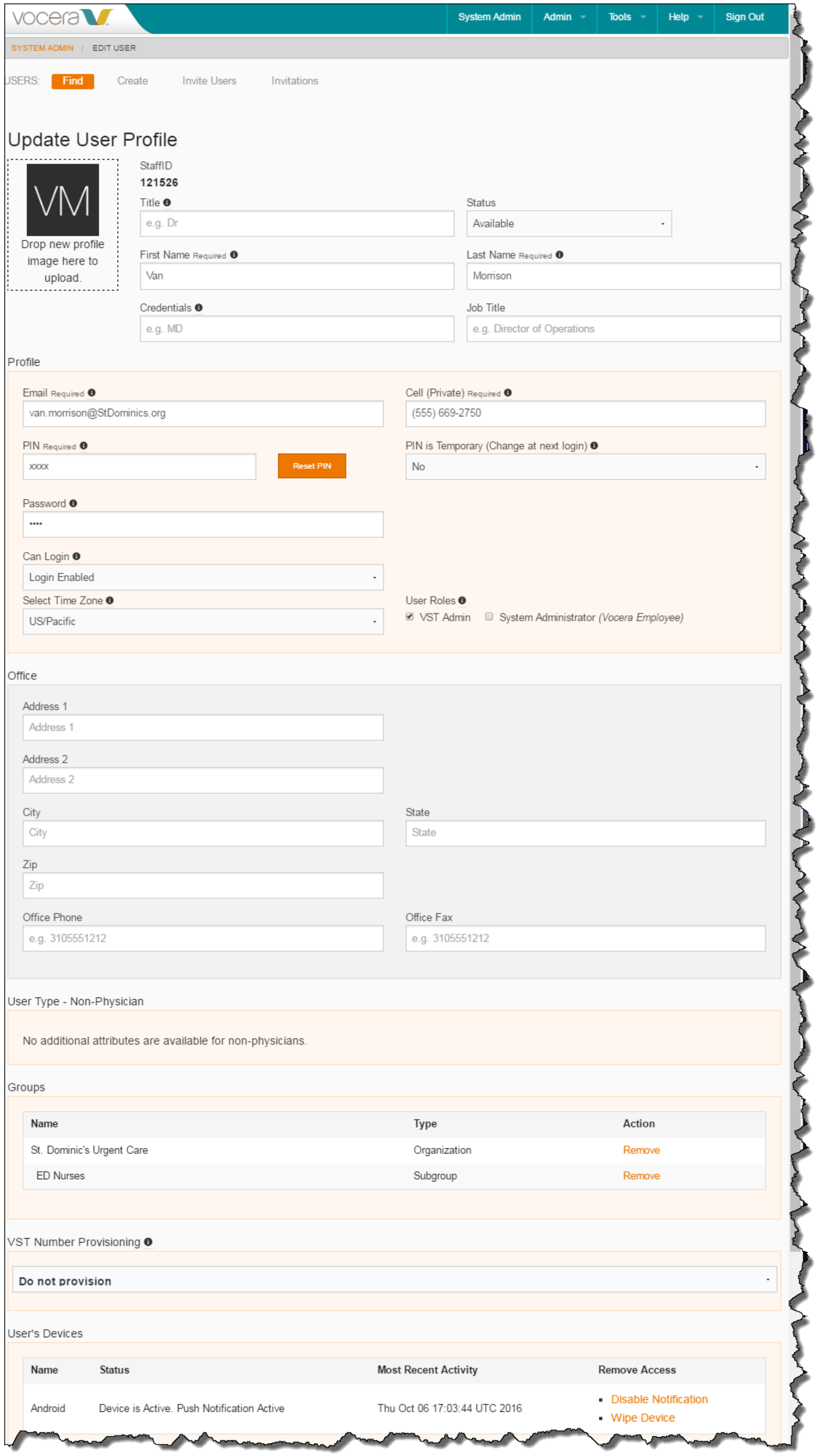
The user's PIN is changed. The user is not notified of the new PIN value; you must manually communicate it to the user.

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 48.
2. To the right of the user's name, click the View link.
   The profile for that user is displayed.



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.

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.

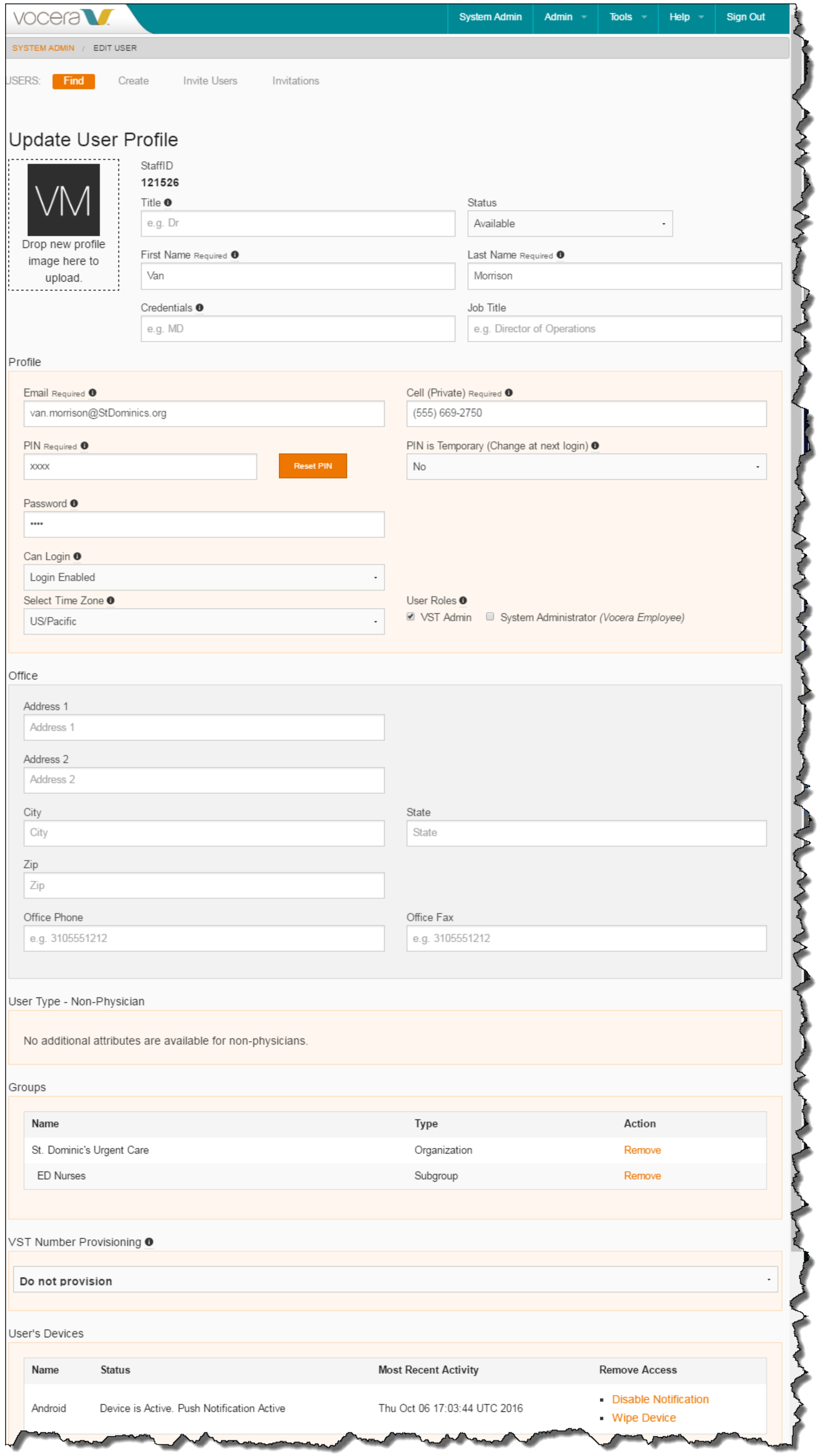
How to Unlock a User Account

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 48.
2. To the right of the user's name, click the View link.

   The profile for that user is displayed.



3. Set the value of the Can Login field to Login Enabled.
4. 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.