

Managing Sub-User Accounts:

There are two types of sub-user accounts that can be created: a Sub-User with Supervisory Rights and a non-supervisory Sub-User.

- Sub-Users with Supervisory Rights have the ability to **review and submit results for all sample sets**. They will receive the same reminder emails as the primary account holder, excluding tracking number emails. They are also able to create other Sub-User accounts, as well as delete and edit non-supervisory Sub-User accounts.
- Non-supervisory Sub-Users are **only able to enter and save results for sample sets that have been assigned to them** by the primary account holder or a Sub-User with Supervisory Rights. They will receive limited email notifications regarding the account but will only receive due date reminders if that option was selected during the account set-up. They cannot edit their own accounts or any other Sub-User accounts. **Non-Supervisory Sub-Users cannot submit results.**

Creating a Sub-User with Supervisory Rights:

- 1) Log in to Paperless Proficiency Testing™

LOGIN TIPS:

- a. When you open your browser window, type the web address into the address bar [www.api-pt.com]. Sometimes a link, bookmark, or search engine won't load the most recent version of the website.
 - b. On the API homepage, click the "Login" button in the **teal** section, directly underneath "Paperless Proficiency Testing™."
 - c. Enter your User ID in the appropriate field. When entering the password, turn the CAPS Lock button off and use the Shift key for all capital letters.
- 2) Once you have logged in successfully, move the cursor to "My Account" in the **teal** section, on the left-hand side of the screen.
 - 3) Click on "Manage Sub-Users."
 - 4) On the "My Account – Manage Sub-Users" page, click on "click to Add User."
 - 5) On the "Account Settings – Advanced Options – Add User" page:
 - a. Enter the name of the new Sub-User in the "Name" field.
 - b. Enter the Sub-User's email address in the "Email field."
 - c. The system generates a password of a combination of capital letters and numbers. If desired, you are able to change it during this set-up.
 - d. Under "Options," check the box next to "Check to allow this person to review all results and to submit results to API ('Supervisory Rights')."

- i. Please Note: The list of tests in the “Sample Sets Available to Assign” section will gray out because a Sub-User with Supervisory Rights has access to all tests.
- e. If desired, under “Options,” check the box next to “Check if this person should receive due date reminder emails.”
- 6) When all information is complete, click “Save and Email Password to New User.”
- 7) The new sub-user will receive an email with his/her newly created User ID and password. They will be able to log in to the API website immediately after the account has been created.

Creating a Non-Supervisory Sub-User:

- 1) Log in to Paperless Proficiency Testing™ as outlined above.
- 2) Once you have logged in successfully, move the cursor to “My Account” in the **teal** section, on the left-hand side of the screen.
- 3) Click on “Manage Sub-Users.”
- 4) On the “My Account – Manage Sub-Users” page, click on “click to Add User.”
- 5) On the “Account Settings – Advanced Options – Add User” page:
 - a. Enter the name of the new Sub-User in the “Name” field.
 - b. Enter the Sub-User’s email address in the “Email field.
 - c. The system generates a password of a combination of capital letters and numbers. If desired, you are able to change it during this set-up.
 - d. **Do not** check the box under “Options” next to “Check to allow this person to review all results and to submit results to API (‘Supervisory Rights’).
 - e. If desired, under “Options,” check the box next to “Check if this person should receive due date reminder emails.”
- 6) Under “Sample Sets Available to Assign,” select the tests that should be assigned to this sub-user. To select more than one sample set at a time, hold the CTRL button down while clicking on the name of the test.
 - a. Please Note: You may assign the same sample set to multiple users. To do this, check the box next to “Show All” under “Sample Sets Available to Assign.” Once that has been done, you will see the entire list of sample sets ordered for your facility and you may assign them as you usually would.
- 7) Once the tests are selected, click the arrow button that points toward the “Sample Sets Assigned to This Person” section on the right-hand side. The selected tests should move to the “Sample Sets Assigned to This Person” section.

- 8) When the tests show in the “Sample Sets Assigned to This Person” section correctly and all other information is complete, click “Save and Email Password to New User.”
- 9) The new sub-user will receive an email with his/her newly created User ID and password. They will be able to log in to the API website immediately after the account has been created.
- 10) **Once a Non-Supervisory Sub-User enters results and saves them, only the primary accountholder or a Sub-User with Supervisory Rights can “unlock” the results for editing.**

Editing a Sub-User:

- 1) Log in to Paperless Proficiency Testing™ as outlined above.
- 2) Once you have logged in successfully, move the cursor to “My Account” in the **teal** section, on the left-hand side of the screen.
- 3) Click on “Manage Sub-Users.” You will see a list of all of the existing Sub-Users for your facility.
- 4) Locate the Sub-User that you wish to edit and click “Edit,” located on the right end of the row.
- 5) On the “Account Settings – Advanced Options – Edit User” page, all of the current information for the selected sub-user will appear.
- 6) Make the necessary changes.
- 7) Click “Save” at the bottom of the page.
 - a. Please Note: If you are changing the email address for an existing Sub-Users, an email with the User ID and password will not be sent. If you would like to resend the email with that information, enter his/her email address after clicking “Lost Your Password?” on the Paperless Proficiency Testing™ Login page.

Deleting a Sub-User:

- 1) Log in to Paperless Proficiency Testing™ as outlined above.
- 2) Once you have logged in successfully, move the cursor to “My Account” in the **teal** section, on the left-hand side of the screen.
- 3) Click on “Manage Sub-Users.” You will see a list of all of the existing Sub-Users for your facility.
- 4) Locate the Sub-User that you wish to delete and click “Edit,” located on the right end of the row.
- 5) On the “Account Settings – Advanced Options – Edit User” page, all of the current information for the selected sub-user will appear.

- 6) Click the “Delete User” button, located to the right of the displayed “User ID.”
- 7) Click “Confirm Delete” at the bottom of the page.
- 8) On the “My Account – Manage Sub-Users” page, you should see that the sub-user is no longer listed.

These instructions may not cover all of the issues and/or questions that you may encounter. If, at any time, you have a question about managing sub-user accounts, please contact us. We will be happy to answer your questions or help walk you through the process!

API Customer Service

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