IMS
Identity Management Services

Quick Guide –

Setting IMS Preferences

Subject: IMS Set Preferences
Intent: Instructions for using the IMS Set Preferences utility.

Overview

The Identity Management System (IMS) Set Preferences module enables UPMC staff to modify the appearance of IMS in their web browsers.

With the IMS Set Preferences utility, you can:

- Set your default IMS startup menu.

- On the Application Request form, display only the computer applications used by your department.

- Pre-populate the Create New E-Sign-On form with common information such as department name, address and phone number.

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Starting the Set Preferences Utility

Go to the Infosec IMS web site (https://infosec.upmc.com) and log on using your E-Sign-On account ID and password. One of the IMS menus is displayed. The menu you see will either be the "My IMS" portal page, or one of the IMS function menus.
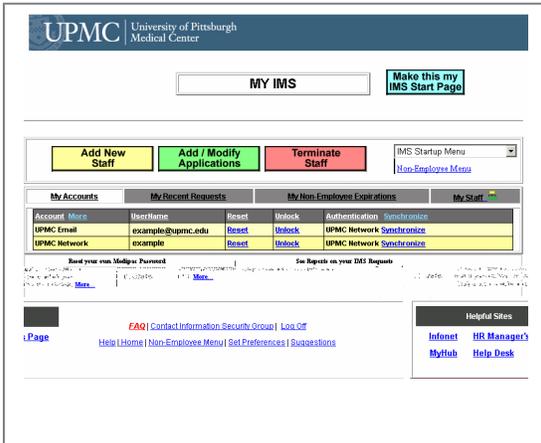
or
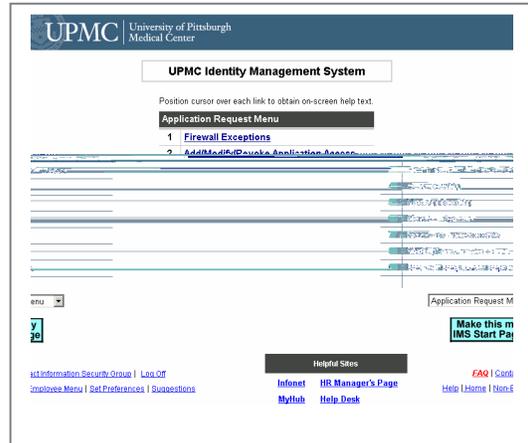
Select **Set Preferences** from the links at the bottom of the page. IMS displays the following menu:
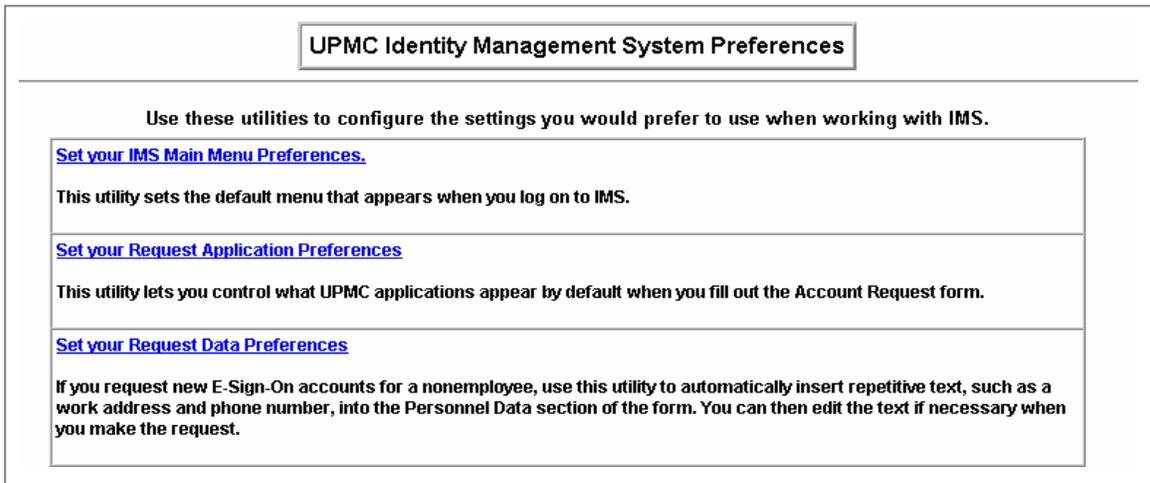
You can now identify the preference that you wish to set.

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Setting your IMS Main Menu Preference

In addition to the following process, any time you see the blue **Make this my IMS Start Page** button on a page, you can make that page your startup menu simply by selecting that button.

Step 1: Access the UPMC E-Sign-On Preferences utility

Log into IMS and select **Set Preferences** from the links at the bottom of the page.

Select **Set your IMS Main Menu Preferences**. IMS displays the following form:

Change UPMC E-Sign-On Preferences	
E-Sign-On ID :	Example1234
Menu Information	
My IMS Startup Menu :	Application Request Menu
Change Startup Menu Preference	

You can now select your default startup menu.

Step 2: Select a specific menu from dropdown list

From the drop-down list, select the menu you wish to use as the default.

Note: If you are trying to select a menu, and you do not see it on the dropdown list, it means you do not have access to that menu. Only UPMC managers are automatically granted access to some menus and forms. If you need access to one of those forms and you are not a UPMC manager, your manager must delegate access to you using the IMS Delegate utility.

Step 3: Finalize the change

When you are finished, press **Change Startup Menu Preference**.

Result: IMS Sets Your Default Menu Preference

IMS automatically displays the menu you have selected. This menu will now appear each time you log on to IMS.

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Setting your default computer applications

Step 1: Access the Set UPMC Application Request(s) Preferences utility

Log into IMS and select **Set Preferences** from the links at the bottom of the page.

From the IMS Set Preferences utility, select **Set your Request Application Preferences**. IMS displays the following form:

Set UPMC Application Request(s) Preferences

Select applications from Applications Available list to set Applicaiton Request(s) Preferences.

Back to UPMC Preferences

E-Sign-On ID :	Example1234

--Select A Location--

Applications Available

A.P. Imaging
AASM
Abacus
AccessAnyware
Achieve
Beaver Hospital
Canopy
Cerner
Churchill
Clarity
Clinician
Cognos

Applications Selected

>
>>
<
<<

Sort Order

Set Application Request(s) Preferences

You can now configure which applications you wish to see on the IMS Application Request form.

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Step 2: Select Applications

Scroll through the "Applications Available" list, to find the applications you wish to show, and highlight each one by clicking on it.

Note: You can hold down the CTRL key while clicking to highlight multiple applications at once.

When you are finished highlighting applications, press the **>** button to add those applications to the "Applications Selected" list. The page will look similar to this:

You can add more applications to the "Applications Selected" list in the same way, or remove some by highlighting them in the selected list and pressing the **<** button.

You can move all applications from the available list to the selected list by pressing the **>>** button, and move all selected applications back to the available list by pressing the **<<** button. You can select a pre-defined list of applications that are common for users at a particular location by choosing that location from the drop-down menu.

You can now sort the applications so they are displayed in the order you want them to appear on the form.

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Step 4: Arrange Order of Applications

When you add multiple applications at once, IMS places the applications you have selected in alphabetical order in the Applications Selected section of the form. If you add applications in several steps, the Applications Selected section displays the most recently added applications at the top of the list.
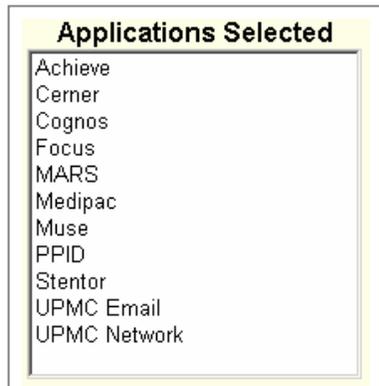
If you save this configuration setting, your default IMS Application Request form will display them as follows:

The IMS Preferences utility enables you to display the applications in any order you choose.

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For example, to place the UPMC Network application at the top of the column, highlight the application name in the Applications Selected list, and then press the "up arrow" button to move the highlighted application towards the top.

Pressing the button multiple times can move the application all the way to the top. You can also move applications down on the list using the "down arrow". When you finish positioning the selected applications, press **Set Application Request Preferences**.

Result: IMS Sets Your Default Menu Preference

IMS sets the applications you have selected to appear the next time you use the Application Request form.

Based on the example above, IMS would display your Application Request form as follows:

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Setting default data for creating a new E-Sign-On

Step 1: Access the Set UPMC Application Request(s) Preferences utility

Log into IMS and select **Set Preferences** from the links at the bottom of the page.

From the IMS Set Preferences utility, select **Set your Request Data Preferences**. IMS displays the following form in a new window:

Set Data Preference for New E-Sign-On Account

Demographics Preference

Job Title :		(Enter HR Job Title or User Title as Applicable)
Cost Center :	CostCenter Buisness Unit	(Enter HR Cost Code ex: 50027 01UPMCS)
Department Name :		
Hospital Affiliation :	– Select –	
Office Address1 :		
Office Address 2 :		
Office Address 3 :		
City :		
State :	AK	
Zip:	-	
Phone :	1-( ) - - Ext.	

Email Address Preference

Account Coordinator Email :	
Manager Email :	
Copy Request to Email :	

UPMC Network Preference

Attach To Hospital Unit: [Organizational Unit (OU)]	– Select –

Set Preference

You can now configure the default data to use when you are creating new E-Sign-On accounts using the IMS Request New E-Sign-On utility.

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Step 2: Fill Out Form

Use the form to enter data that will be entered into the New E-Sign-On utility auto-
matically whenever you use it. You will be able to change this default text when you use
the utility.

For example, if you commonly only create E-Sign-On accounts for computer users at a
particular location, enter the address information for that location and you will not have to
re-enter that information every time you create a new E-Sign-On. If you need to create
an E-Sign-On for a computer user at another location, simply delete the default infor-
mation from the form and enter the new location.

When you finish filling out the form, select **Set Preference**.

Result: IMS sets your default data preference

IMS sets your data preferences so that the next time you manually create an E-Sign-On
account for someone, the form is pre-populated with the default data you specified
through this utility.

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Related Documents:

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