



Managing and Inviting Users in the PDWS

Users with a Coordinator or Super User role can invite new users (for equal access or lower) to access the PDWS using the User Management Tool (UMT) in the Setup tab.

When users are invited:

- The system sends an email to the new user and tracks the status of the invitation
- The invited user receives an email invitation with a link to the PDWS and instructions to:
 - Register for an AAMC account or log in with an existing AAMC account and
 - \circ $\;$ Verify their email account (only if a new AAMC account was created).
- After the user logs into the PDWS and accepts the Terms and Conditions, the user will be able to access the system.

Follow the steps below to send the invitation.

1. From the Dashboard, click on the Setup tab.

Dashboard	Applications 🗸	Scheduler 🗸	Rankings	Reports	Archives	Setup	Program Messages
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 Click on Manage Users to be redirected to redirected to the User Management Tool (UMT).

					Q Sea	rch Applicants	6	?	Richard Peng 21060331 RP
AAMC POWS	Da	ishboard	Applications	Scheduler	Rankings	Reports	Archives	Setup	Program Messages
Bulk Print Requests Link to EAM History						l	ERAS TEST SP	ONSOR MD	1 Emergency Medicine
General	Data Filters								
Data Filters Reports	Data Filters hide sensitive informati results. You can switch data to scre		wable at any time		ss. Screened da	ta will not be	displayed in a		
Comparison Tool Manage Users C	Basis for Work Authorization		Screened Vi	ewable	Limitations			Sore	ened Viewable
Applications	Birth Date		0		Misdemeanor	Conviction		(
Statuses	Current Work Authorization		0		Photograph			(
Scores	Designated Pronouns		0		Self Identifica	tion		(
Attributes	Felony Conviction		0		Visa Sponsor	ship Needed		(
Scheduler	Gender		0		Visa Sponsor	ship Sought		(
Calendar	Hometown(s)		0						
Interview Locations									CANCEL SAVE
Scheduler Reports									





The view and available options in the **Setup** tab are dependent on your assigned role. You must have either a Program Coordinator Role, Program Super User Role, or Institutional Super User Role to manage or invite users.

3. Select the appropriate tab to view your institution(s) or program(s) that you have access to.

To manage access at the <u>institutional level and grant an institution specific role</u>, click on **Manage Access** for the institution you would like to configure under the **Institution** tab.

			Holly Flax (HF)
AAMC User Management Tool			ft Home
	Select an Application to Manage		
	Institution	Program	
	Q. Search COLUMN FILTER 🛹 REORDER 🍖 SHOW / HIDE		
	Application 🕈 Institution 🕈	Manage	
	ERAS Program Director Work Station Duke University Health System	MANAGE ACCESS	
	Total Items: 1	Items per page: 200 💌 Page 1 of 1	

To manage access at the <u>program level and grant program specific roles</u>, click on **Manage Access** for the program you would like to configure under the **Program** tab.

				Holly Flax HF)
AAMC User Management Tool				↑ Hom	10
Se	elect a Program to Manage				
_	Institution	P	rogram		
	Q Search COLUMN FILTER - REORDER	🗞 SHOW / HIDE			
	Program Name 🛧 Institu	ation 1	Manage		
	Duke University Hospital Program - Dermatology Duke	University Health System	MANAGE ACCESS		
	Duke University Hospital Program - Medical Genetics Duke	University Health System	MANAGE ACCESS		
	Duke University Hospital Program - Endocrinology. Duke Diabetes, and Metabolism (Internal Medicine)	University Health System	MANAGE ACCESS		
	Duke University Hospital Program - Gastroenterology Duke (Internal Medicine)	University Health System	MANAGE ACCESS		

Your view may vary depending on the institution(s) or program(s) you have access to.





4. Configure current users' access in the Users tab using the available Actions drop-down menu items.

KC User Management Tool			
ERAS Program Directo	r Work Station - Duke University Health System	- Emergency Medicine	
Users . Search . Search	COLLIMN FILTER > REORDER & SHOW / HIDE	ACTIVE USERS INACTIVE USERS	BULK ACTIONS -
Active Roles (1)	Example	example@samc.org Inactive Roles (0)	Actions ^ Extend Roles Grant Roles
Active Roles (1)	Diana Program Coordinator	Example@aamc.org	Revoke Roles View All Roles
□ ✓ PCtwo	Diana	example@aamc.org	Actions ~
□ ∨ Dagnone	Cal	example@aamc org	Actions ~

Use the tools at the top of the page to quickly identify users you need to configure and expand user details to view Active roles.

5. Click on the Invitations Tab to manage existing invitations or to send new invitations to new users. Click on the Actions drop-down menu to manage an existing invitation or click on Invite User to invite a new user to access the PDWS.

AAMC User Management Tool										ft Home	Users Holk	Flax HF + Invitations
	ERAS Progr	am Director)	Work Station - D	uke University Healt	h System							
	Invitations	2 INVITE USEF	1									
	Q Search		COLUMN FILTER	REORDER 💩 SHOW	/ HIDE			B	ULK ACTIONS -			
	~	First Name 🛧	Last Name 🕈	Email 🕈	Status 🕹	Date Issued 🛧	Date Redeemed 🕈	Expiration Date 🛧	Actions			
	• •	Richard	Peng	rpeng@aamc.org	Sent	11/02/2022		11/30/2022	Actions ~			
	□ •	Irving	Example	example@aamc.org	Redeemed	11/02/2022	11/02/2022		Actions ~			
	□ ~	Lisa	Example	example@aamc.org	Redeemed	11/02/2022	11/03/2022		Actions ~			
	•	Hasan	Example	example@aamc.org	Expired	10/31/2022	10/31/2022		Actions ~			





6. Insert the first name, last name, and email address. Select a role appropriate for the invited user.

					Ho	elly Flax (HF)
AAMC User Management Tool		1		n Home	Users	+ Invitations
	ERAS Program Director Work Station	- Duke University Hospital Progra	m - Dermatology			
	Invite New User					
	2 First Name *	Last Name *	Email Address *			
	Enter First Name	Enter Last Name	Enter Email Address			
	Notify me when redeemed					
	Roles *					
	Alternative Program Super User - The Al Capabilities		Program Super User with the exception of granting the PSU role.			
	Program Coordinator - The PC role has r Capabilities: • Apply Saved Filters • Assign Applicants • Create Report (user created only) • Create/Grant/Revote roles • Edit All Assigned Applicant scores and + Show More	ead and write access allowing them to view inform	nation and make changes.			

Click on the Show More toggle below each role to view the comprehensive list of role capabilities. Choose a role based on the needs of the user in the PDWS.

7. Click on Send Invitation at the bottom of the page to invite the respective user. Once the user has received the invitation and completed steps to sign into the PDWS, their status within the Invitations section of UMT will change to "Redeemed".

	Reviewer/Interviewer Read only - The R/I Read Only role limits users to see the applicants to whom they are assigned or scheduled to interview. Capabilities: • Apply Saved Filters • Restricted Applicant View • View Application(s) • View Attributes and Qualifying Experience • View Data Filters + Show More
	CLEAR SEND INVITATION
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