

HealthStream Learning Center

Administrator Role

Management

HLC Administrator Role Management

Administrator roles are the heart of security in the HealthStream Learning Center (HLC). This document will assist in managing administrator roles. This contains documents referencing role assignments, training and best practices for customization. This document is intended for new customers to HealthStream

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Administrator Role Assignments

HLC Administrator Roles	Description	Typical Recipients
HLC - Enterprise Administrator	Person(s) administering HealthStream at the highest level of the organization (i.e. able to view and impact all institutions within the organization). This role has access to all features throughout the entire organization.	People responsible for HealthStream administration throughout the entire hierarchy of the organization
HLC - Institution Administrator	Person(s) administering HealthStream at the institution (i.e. facility) level. This role has access to all features throughout the institution.	People responsible for HealthStream administration throughout a specific institution or affiliation within the organization
HLC - Associate Administrator	Person(s) who will make assignments and develop learning, but do not need to control institutional settings such as the management of buildings and resources, departments, institution highlights, or alerts.	Educators or directors
HLC – Executive View	Person(s) who require the ability to view but not edit administrator settings, course settings, resources, and job categories.	Executive level management
HLC - Instructor	Person(s) who will manage scheduling, enrollment, and grading of all classes.	Class instructors and educators
HLC – Manager View	Person(s) who will run reports and register their own staff members for classes.	Department managers
HLC - Education Office Assistant	Person(s) who will assist students with the use of HealthStream. This role allows the individual to enter data for administrator-developed learning, but not publish the learning to be active in the system.	Education administrative assistants
HLC - Password Assistant	Person(s) who will reset user passwords only.	IT support
HLC - CE Credit Manager	Person(s) who manages the CE Credit program.	CE course provider managers
HLC – Import Manager	Person(s) who can run the various import results reports.	HR or IT representatives who create the import file

HLC Feature Roles	Description	Typical Recipients
Feature - A.D.A.M. Resource Administrator	Provides access to the A.D.A.M. Resource Library for online content development purposes. Should be combined with either Course Builder or Course Builder/Publisher.	Content developers*
HLC – Feature – Course Builder	For administrators who will create but not publish content including: classroom, online, test, evaluation, etc.	Content developers only*
HLC – Feature – Course Builder/Publish	For administrators who will create and publish content including: classroom, online, test, evaluation, etc.	Content developers and publishers*
Feature – Team Author Administrator	Provides access to Team Author features. Team Author provides collaboration of course development.	Content team developers*
Feature – HealthStream Video Admin	Provides access to HealthStream Video. Enables the user to develop, edit and share video. Also provides access to the video learning activity.	Video editors*

* The role is typically combined with another role.

Typical Number of Administrator Roles

Administrator Roles	# per Institution
Enterprise Administrator	2 per entire organization
Institution Administrator	2 - 3
Associate Administrator	7 - 10
Executive View	1 - 5
Instructor	10 - 20
Education Office Assistant	1 - 4
Manager View	equals the number of managers
CE Credit Manager	1 - 2
Import Manager	1 - 2
Password Assistant	equals the number of IT staff

Administrator Training by Role

These courses have been specifically developed based on functions performed by administrators. The matrix below indicates which courses apply to each administrator role. Combined, these courses can be used to train your administrators. If interested in purchasing this additional content, please contact your account representative.

	HLC - Enterprise Administrator	HLC - Institution Administrator	HLC - Associate Administrator	HLC - Executive View	HLC - Instructor	HLC - Education Office Assistant	HLC - Manager View	HLC - CE Credit Manager	HLC - Import Manager	HLC - Password Assistant
Administrator Academy - Welcome to the HLC	x	x	x	x	x	x	x	x	x	x
Administrator Academy - Administrator Access	x	x	x	x	x	x	x	x	x	x
Administrator Academy - Add a Course	x	x	x					x		
Administrator Academy - Administrator Management	x	x								
Administrator Academy - Alerts	x	x								
Administrator Academy - Assignment Management & Reporting	x	x	x							
Administrator Academy - Assignments Overview	x	x	x	x		x	x			
Administrator Academy - Class Management	x	x	x		x	x	x			
Administrator Academy - Course Overview	x	x	x	x	x	x	x	x		
Administrator Academy - Course Pre-work	x	x	x		x					
Administrator Academy - Course Publishing	x	x	x							
Administrator Academy - Learning Events	x	x	x			x				
Administrator Academy - One-Time Assignment	x	x	x							
Administrator Academy - Recurring Assignments	x	x	x							
Administrator Academy - Regulatory Course Management	x	x								
Administrator Academy - Student Data Management	x	x	x	x	x	x	x	x	x	x
Administrator Academy - Student Group Management	x	x	x			x				

Best Practices of Role Customization

The considerations below will explain the process used to customize or create administrator roles. This information is helpful to ensure proper feature configuration and performance when implementing role customization. Customization requests will be performed by Operations Support.

- As a general rule, new customers should utilize the default roles for 6 months before considering customization. It is important to be familiar with the functionality of the default roles to understand what adjustments may need to be made.
- A unique identifier added as a suffix to the role name is recommended to identify the role as customized (e.g. Epic Instructor*). This is done to easily identify customized roles within the organization.
- The following are some considerations when changing roles:
 - To view assignments on the My Learning page or reports, Assignment Management features must be set to View.
 - To view the student transcript, the Student and Group Transcript report must be set to View.
 - Class Registration must be enabled for class grading.
 - To run class-based Analytic reports, ReportView_ClassRegistration must be set to View.
 - To access Learning Events, Outside Activity Management must be enabled.
 - To run any of the class reports, Class Administration must be enabled.
- When possible, it is recommended to add/remove role features to existing roles rather than creating a new role. A new role should only be created when access needs to be provided to a certain group without impacting all assigned to a particular role.
- Use the Role Features report (lists features associated with a role) as your main tool to review and customize a role.
- The Role Matrix is an Excel document that displays the system features associated to all HealthStream default administrator roles. This document can be utilized to see the relationships and compare roles and help guide discussions around features associated to existing administrator roles in the organization.

Administrator Role FAQs

What do the administrator role features mean?

Refer to the [HLC Admin Features](#) document available in the online Help. This document provides an explanation of the administrative features associated to the roles.

What is a default ('out-of-the-box') role?

A default role is a HealthStream provided administrator role that is utilized 'out-of-the-box'. This means no customizations have been made to the name or features associated to the role. And, the role is used 'as-is'.

What is a custom role?

A custom administrator role is created once the name and/or features associated to the role have been edited or a brand new role is built. Administrator role customization requests are handled by Operations Support.

How do I know what features are associated to a specific administrator role?

The Role Features report displays the system features that are associated to a selected administrator role. This report can be generated for one administrator role at a time which allows you to compare and contrast roles.

What is the Role Matrix?

The Role Matrix is an Excel document that displays the system features associated to all HealthStream default administrator roles. This document can be utilized to see the relationships and compare roles and help guide discussions around features associated to existing administrator roles in the organization.

Why is it best practice to use the Role Features report versus the Role Matrix?

The Role Features report provides a current reflection of what features are associated to the administrator roles within your organization. The Role Matrix is specific to the default roles. It will not reflect any customizations that could have been made to the administrator roles in use at your organization.

What is the difference between Enterprise and Institution Administrator roles?

Enterprise administrators are responsible for managing HealthStream for the entire hierarchy of an organization. Institution administrators are responsible for administration of a specific facility within the hierarchy of an organization.

How can I tell who is already assigned a specific administrator role?

The Role Utilization report lists all administrators within the hierarchy. It provides the option to report on all roles or specific roles provides the opportunity to gather each administrator's name, role and email address.

What is the best practice for providing an end user access as an administrator?

There are 2 ways to provide an end user access as an administrator. The table below advises when each option should be used to provide administrator access.

- **Promote to Administrator** – Use when the person you wish to add as an administrator is already a student in the system and the desire is to ensure that a single login can be used to access the system. (Best Practice)
- **Add an Administrator** – Use when the person you wish to add as an administrator is NOT currently a student within the system. Some may also elect to use this option if the desire is to keep the student login separate from the admin login.

What type of administrator training is available?

HealthStream offers various training options for new and existing clients. The training offerings include instructor-led online and in-person sessions, webinars and self-paced learning. For more information contact your Account Owner.

Can an administrator have more than one administrative role associated to their account?

Yes, it is very possible an administrator may have more than one role. Some roles are feature based. This means the role will only work in combination with another administrative role; i.e. an Institution Administrator may also have the HLC-Feature – Course Builder/Publish administrative role assigned to their account.

How does the option to “Acquire an Administrator” work?

Acquiring an administrator allows organizations with multiple facilities within their hierarchy to copy an administrator record from one institution to another. This allows the administrator to use a single login to access both institutions.

Administrators who have been acquired by another institution can:

- Log in to both institutions using a single login (user ID and password). When logging in, the administrator is presented with the Select Affiliation page and can choose the desired institution to log into.
- Be designated to different administrator roles for different institutions.
- Toggle from one institution login to another by clicking the **Administrator** link at the top of any page to return to the Select Affiliation page.



I am part of a large organization with multiple facilities. Some of the access we provide to our administrators varies based on the facility. Can an administrator have different administrative roles at multiple facilities within the same hierarchy?

Yes, it is very possible an administrator may have different roles at various facilities within the organization's hierarchy. For example, I may be an Institution Admin for Facility A and an Instructor for Facility B within the same hierarchy. When I log into Facility A, I will have access as an Institution Admin. And, when I log into Facility B, I will only have access as an Instructor.

As an Enterprise Admin, do I need to have every administrator role at multiple institutions within my organization's hierarchy?

No, as an Enterprise Admin, you **only** need to have the Enterprise Admin role and any additional feature roles at the highest level in the hierarchy. You can toggle and navigate the hierarchy through the Select Affiliation screen. Thus, allowing you to perform any task as an Enterprise admin throughout the hierarchy and eliminating the need to acquire the administrator account into multiple facilities.

To toggle the system as an Enterprise Admin at the highest level in the hierarchy:



Megan Heady | [KC Health System](#) | Administrator



Clicking the Affiliation/Facility Name will direct you to the Select Affiliation page where you can navigate to other locations within the hierarchy.

This link is only active when logged in at the enterprise level.

What is the process to remove administrator access?

It is recommended to have a policy in place to ensure administrator access is reviewed and updated accordingly. Remember – inactivating a student account does not automatically deleted administrator access. Access must be removed manually or via the 25th column (Inactivate All Accounts) in the Student Demographic Import file.