

User Guide

ORTHO PLUSSM Solutions

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Revision History

Date	Page	Description
2011-04-27	All	Initial release
2013-03-12	1-2 1-2 1-2 1-2 2-1 2-1 2-2 3-1 3-3 3-6 3-9 3-12 4-1 to 4-2	1st paragraph, 2nd bullet: “Ship To and there” changed to “Ship To. There” 2nd paragraph, 2nd sentence: <i>DELETED</i> 2nd paragraph, 1st bullet: <i>DELETED</i> 3rd paragraph: “Features are also known as applications. The following features are” changed to “Features, also known as applications, are” Step 1: “Logon Name and” inserted before “Password” Step 2, 2nd sentence: “OrthoConnect applications that do not require a contract” changed to “OrthoConnect/ ORTHO PLUS SM by clicking Register Now” Step 3: “using the provided Forgot Password utility” changed to “by clicking Forgot Password” Step 1: “Logon Name and” inserted before “Password” Step 6, 3rd sentence: “OCD recommends that you select” changed to “Select” Step 1: “Logon Name and” inserted before “Password” Step 1: “Logon Name and” inserted before “Password” Step 1: “Logon Name and” inserted before “Password” New Chapter 4 “Managing Automatic Alerts” added
2013-10-09	2-1 to 2-10 2-11, 3-1, 3-6, 3-9, 3-13 2-11 3-3 3-10 and 3-11	New Sections “Registering for New Users” and “Registering for Current Users” added Step 1: changed to read “enter your User Name and Password, and click Log In” with new screen capture Step 2: Revised instructions for Forgot Password Step 6: “Logon Name” changed to “User Name” Steps 4-7: Revised instructions for managing alerts
2013-11-22	3-1 to 3-12 throughout	New Chapter 3 “e-Communications” added All screen captures have been updated as needed

Date	Page	Description
2018-04-13	All	Removed Johnson & Johnson references and updated screenshots.

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About This Guide

Purpose

The purpose of this guide is to provide Users and Customer Administrators information on ORTHO PLUSSM Solutions. It explains how to use it as a Web Portal for access to ORTHO PLUSSM applications and services.

Audience

This guide was written for users of ORTHO PLUSSM.

Key Terms/Glossary

TERM	DEFINITION
Application	The various programs within ORTHO PLUS SM .
Customer Administrator	Customer representative given administrative authority and access for all Users within their Organization.
Feature	A term used interchangeably with Application.
Location	A term used interchangeably with Ship To.
Ortho Administrator	Ortho representative with authority to manage all aspects of organization, site and user setup and support.
Organization	The highest level of customer within the ORTHO PLUS SM Solutions application. May include one or more Ship To's
Ship To	Individual customer site (laboratory) within a customer organization. It is the actual location of the analyzer(s).
Site	A term used interchangeably with Ship To.
UCN	Universal Customer Number: A term used interchangeably with Ship To.
User	Customer / individual account user with limited access to ORTHO PLUS SM features.

ORTHO PLUSSM Solutions Structure

Organization

The highest level within the ORTHO PLUSSM Solutions application.

- Each organization must have 1 and only one customer administrator.
- An organization must have at least 1 affiliated Ship To. There is no limit to the number of affiliated Ship To's each organization can have.
- Ship To's within the same organization can share data and users.
- Preferences set at the Organization level affect the Features and Properties available at the Ship To and User Levels.

Ship To's are also known as UCN (Universal Customer Number), Site or Location.

- Each Ship To can be affiliated with one and only one organization
- Feature access is also controlled at the Ship To level with each Ship To being assigned a subset of those made available at the organization level.

Features, also known as applications, are available within ORTHO PLUSSM Solutions.

- ORTHO PLUSSM Services – Access the specific ORTHO PLUSSM features.

(For a complete list of ORTHO PLUSSM Services, see <https://www.orthoclinicaldiagnostics.com/en-us/home/services.>)

Each organization must have one and only one Customer Administrator, who is granted access to manage all aspects of account setup and management including:

- Create/edit/delete users
- Grant/edit/remove the access rights of a user to a specific feature
- Grant/edit/remove the access rights of a user to access a specific Ship To
- Reset user passwords

The Customer Administrator maintains access for all authorized ORTHO PLUSSM users at the customer site(s) and updates security permissions to align with every change in personnel or roles and responsibilities.

Users are granted access rights to use specific features at specific Ship To's within an organization.

- Each user can be granted access to one and only one organization
- Users are granted access to one or more Ship To's within the organization.
- Users are granted access to specific Features at the Ship To level.
- Users may be granted no access, read-only access or read-write access at the by-Feature by-Ship To level.

Where to Get Help

This guide should answer all the questions you may have about the ORTHO PLUSSM Solutions.

For further information please contact us:

- 800-421-3311 option 4 Monday - Friday, 8 AM - 5 PM (Eastern Time)
- orthoplus@orthoclinicaldiagnostics.com.

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Getting Started

Registering for New Users



- 1 Go to <https://orthoplus.orthoclinicaldiagnostics.com> and click **Register Now**.

I am an employee of Ortho Clinical Diagnostics or an affiliated company

Already Registered? Please Log In

User Name

Password

Log In

[Forgot Password](#)

Register Now



 (continued)

- 2 Complete all of the required fields (fields with *) on the Registration Profile Information screen and click **Next**.

Registration

1 Profile Information 2 Security Questions 3 Customer Enhanced Features 4 Consent Agreement

Enter User Profile Information

* = required field

User Title

First Name *

Middle Initial

Last Name *

Email *

Your email address will function as your user name.

Confirm Email *

Telephone Number * Ext.

Fax Number Ext.

Company/Affiliation

Street

City/Region

State (US)

Or

Province (International)

Zip/Postal Code

Country

Note: The address information that you enter on this page may differ from the address for product shipments and/or official product notifications.

 (continued)

- 3 On the Registration Security Questions screen, select and answer three security questions, then click **Next**.

Registration

1 Profile Information
 2 Security Questions
 3 Customer Enhanced Features
 4 Consent Agreement

Select Security Questions

Your security questions are used for ORTHO PLUSSM features such as requesting a password reminder. Please select your security questions and provide your private answers.

* = required field

Security Question 1

What was the name of your elementary / primary school?

Answer 1*

Security Question 2

What is the name of the company of your first job?

Answer 2*

Security Question 3

What was your favorite place to visit as a child?

Answer 3*

- 4 On the Customer Enhanced Features screen Click in the checkbox next to "Yes, associate this account with my customer number(s)" and the screen will change.

Registration

1 Profile Information
 2 Security Questions
 3 Customer Enhanced Features
 4 Consent Agreement

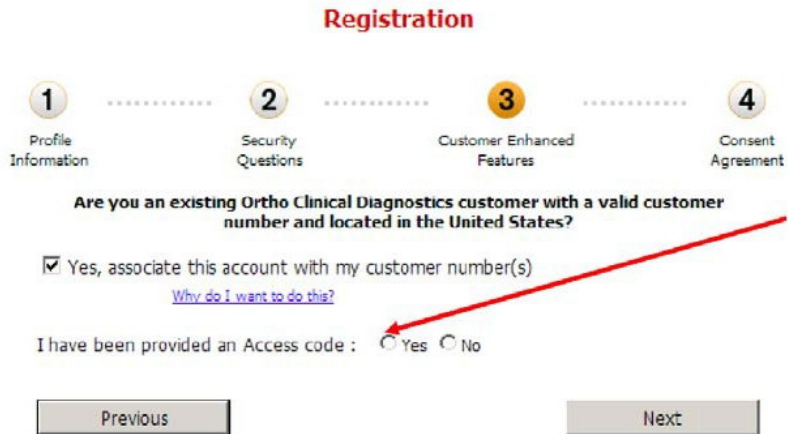
Are you an existing Ortho Clinical Diagnostics customer with a valid customer number and located in the United States?

Yes, associate this account with my customer number(s)
[Why do I want to do this?](#)

If no, please select the 'Next' button.

 (continued)

- 5 Click **Yes** option next to "I have been provided an Access Code" and the screen will change again.



Registration

1 Profile Information 2 Security Questions **3 Customer Enhanced Features** 4 Consent Agreement

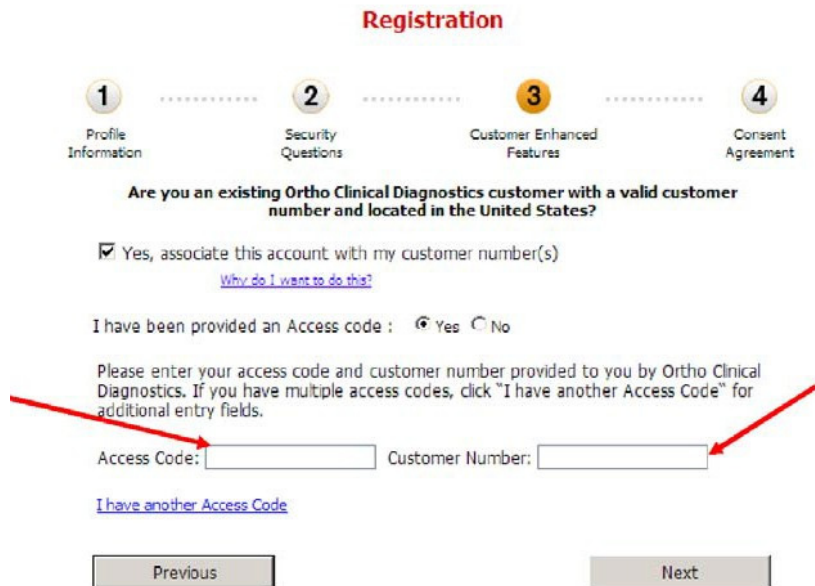
Are you an existing Ortho Clinical Diagnostics customer with a valid customer number and located in the United States?

Yes, associate this account with my customer number(s)
[Why do I want to do this?](#)

I have been provided an Access code : Yes No

Note: If you have not been provided an Access Code, click **No** and proceed to step 7.

- 6 Fill in your Access Code and Customer Number (UCN) and click **Next**.



Registration

1 Profile Information 2 Security Questions **3 Customer Enhanced Features** 4 Consent Agreement

Are you an existing Ortho Clinical Diagnostics customer with a valid customer number and located in the United States?

Yes, associate this account with my customer number(s)
[Why do I want to do this?](#)

I have been provided an Access code : Yes No

Please enter your access code and customer number provided to you by Ortho Clinical Diagnostics. If you have multiple access codes, click "I have another Access Code" for additional entry fields.

Access Code: Customer Number:

[I have another Access Code](#)

Proceed to step 8.

 (continued)

- 7 If you were not provided an Access Code, complete all of the required fields (fields with *) on the screen shown below and click **Next**.

Registration

1
Profile Information

2
Security Questions

3
Customer Enhanced Features

4
Consent Agreement

Are you an existing Ortho Clinical Diagnostics customer with a valid customer number and located in the United States?

Yes, associate this account with my customer number(s)
[Why do I want to do this?](#)

I have been provided an Access code : Yes No

Please provide your company name, and customer number(s) in the fields below

User Title :
 First Name :
 Middle Initial :
 Last Name :
 Email :
 Telephone Number :
 Company :*
 City/Region:*
 Zip/Postal Code:*
 User Customer Numbers :*
 Comments :

*** Indicates a required field**
 If you do not have the information needed for the required fields, [Please contact an Ortho Plus Support Specialist](#)

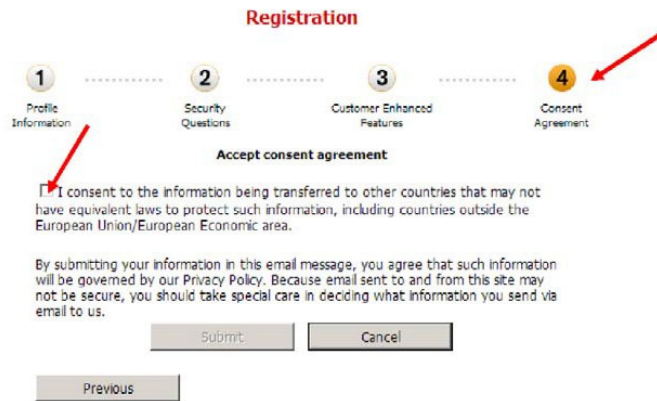
After completing registration, your request and the information entered above will be sent to an administrator for evaluation. An email record of this request will be sent to you. Once your request has been completed you will be notified by email.

You will receive the following email, and further information regarding your account access will be provided in the near future.

Your registration request has been submitted and you will be notified via email as soon as the process is complete. [Please contact an Ortho Plus Support Specialist](#) if you have any questions.

 (continued)

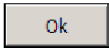
- 8 On the Consent Agreement screen, click in the checkbox next to "I consent to the information ..." The screen will change so that the Submit button is no longer greyed out. Click **Submit** when the button becomes available.



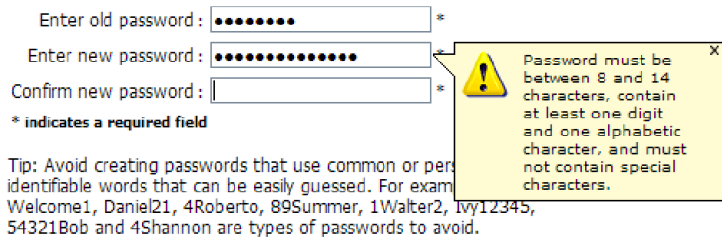
- 9 Click **OK** on the screen that thanks you for registering.

Registration

Thank you for registering with OrthoPlus. You will be emailed a temporary password shortly that you can use to access the site.



- 10 After you receive your temporary password via email, follow the link provided in the email message and you will see the Change your password screen. Create a new password following the boxed guidelines and click **Save**.



Registering for Current Users



- 1 If you know your User Name and Password go to <http://orthoplus.orthoclinicaldiagnostics.com>, Enter your User Name and Password, and click **Log In**. If you do not know your User Name or Password, click **Forgot Password**.

I am an employee of Ortho Clinical Diagnostics or an affiliated company

Already Registered? Please Log In

User Name

Password

[Forgot Password](#)

Register Now



If you selected **Forgot Password**, complete the information on the **Forgot Password** screen and click **Submit**. You will receive an email with your password

Forgot Password

Please enter your user name

-- Or --

Please enter your email address

 (continued)

- 2 Select and provide answers to three security questions and click **Next**.

Registration

1 Profile Information 2 Security Questions 3 Customer Enhanced Features 4 Consent Agreement

Select Security Questions

Your security questions are used for ORTHO PLUSSM features such as requesting a password reminder. Please select your security questions and provide your private answers.

* = required field

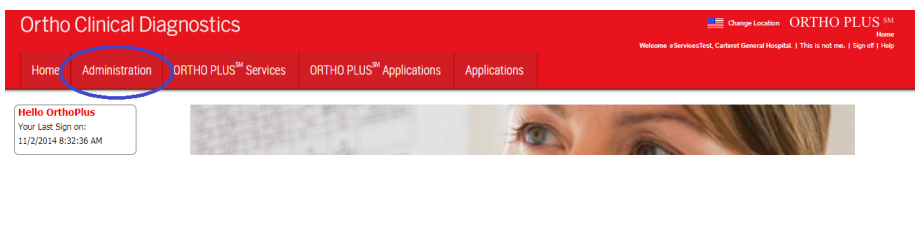
Security Question 1
What was the name of your elementary / primary school?
Answer 1*

Security Question 2
What is the name of the company of your first job?
Answer 2*

Security Question 3
What was your favorite place to visit as a child?
Answer 3*

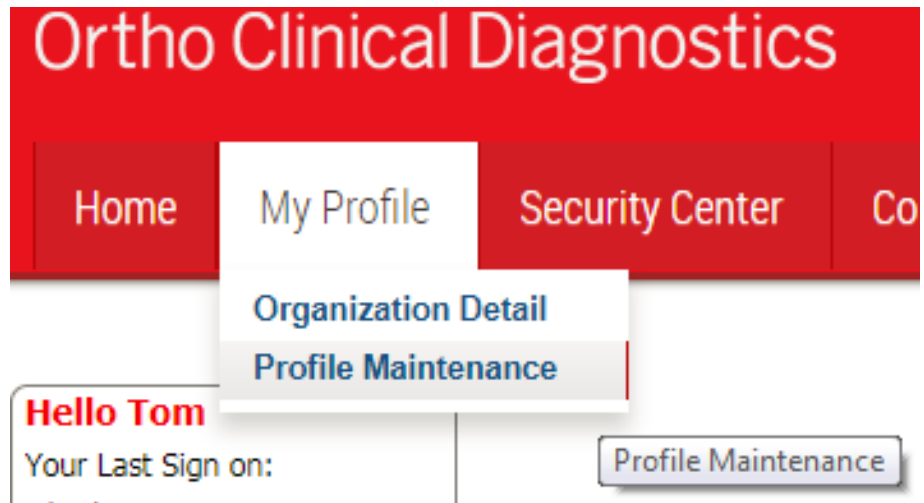
Previous Next

- 3 At the ORTHO PLUSSM home page select **Administration** to associate your account with an Access Code and Customer Number or to review the addresses associated with your account.



❖ (continued)

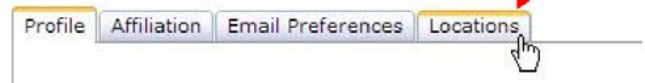
- 4 Locate your cursor over **My Profile** and select **Profile Maintenance** from the drop down menu.



- 5 Click the **Locations** tab.

Menu > [My Profile](#) > Profile Maintenance

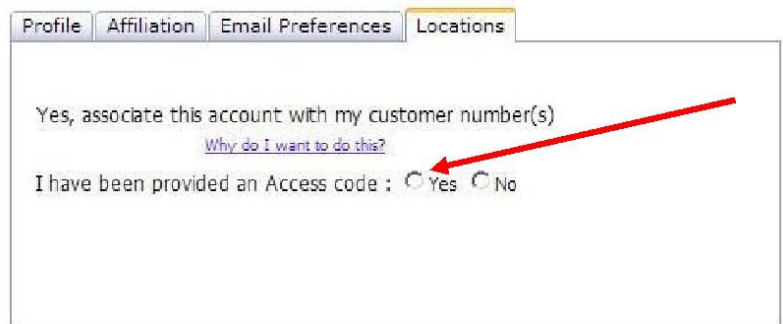
Profile Maintenance for:



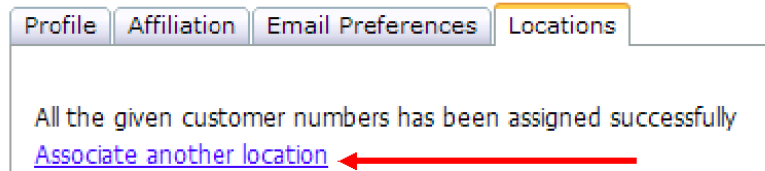
 (continued)

- 6 If you do not have any addresses associated with your account but you have been provided an Access Code, click **Yes** button next to "I have been provided an Access Code" on the Locations screen.

Note: If you do not have any addresses associated with your account and you have not been provided an Access Code, click **No** and proceed to step 8.



Note: If you already have address(es) associated with your account, you will see the screen below. If you want to associate your account with another address, click **Associate another Location**.



The screen will change to the one below Step 6 that asks you if you have been provided an Access Code. Complete Step 6 and proceed to Step 7.



(continued)

- 7 Fill in your Access Code and Customer Number, and click **I have another Access Code** if you wish to enter more Access Codes and Customer Numbers. When you have finished entering your information, click **Register**.

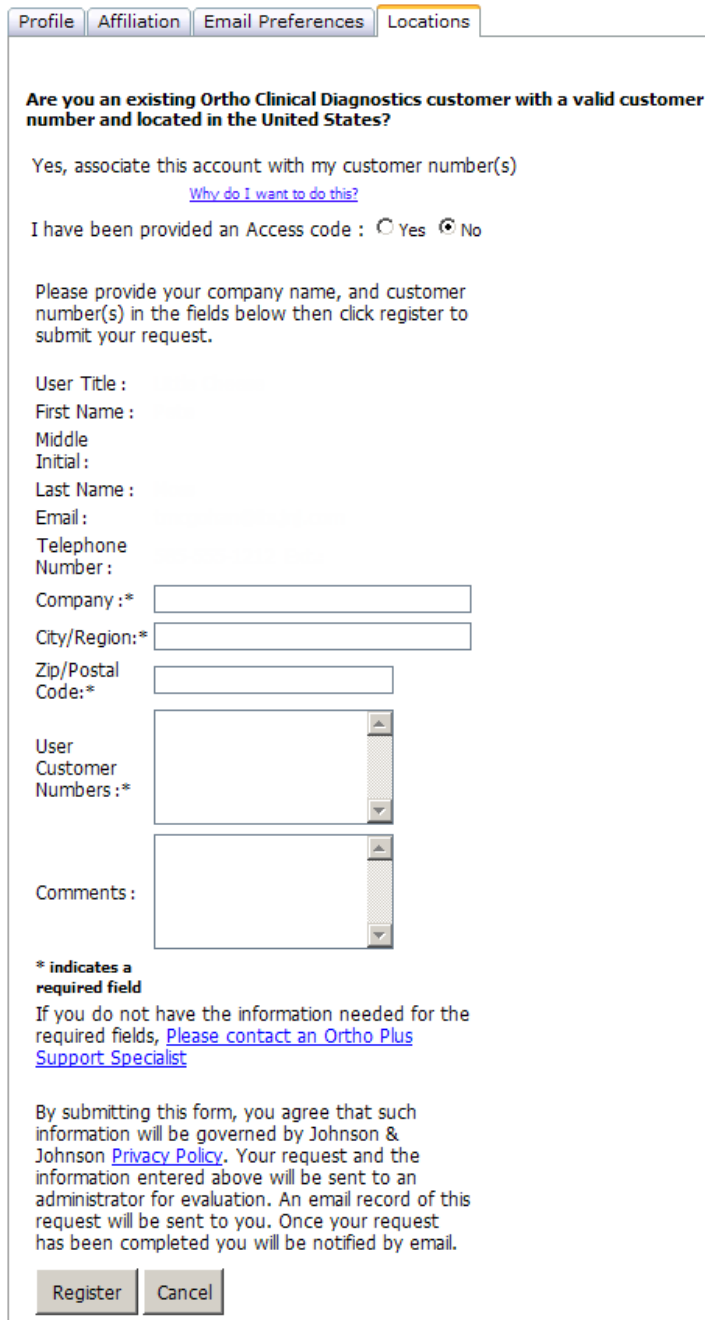
The screenshot shows a web form with tabs for Profile, Affiliation, Email Preferences, and Locations. The 'Locations' tab is active. The form contains the following text and elements:

- Text: "Yes, associate this account with my customer number(s)"
- Link: [Why do I want to do this?](#)
- Text: "I have been provided an Access code : Yes No"
- Text: "Please enter your access code and customer number provided to you by Ortho Clinical Diagnostics. If you have multiple access codes, click 'I have another Access Code' for additional entry fields."
- Input fields: "Access Code: Customer Number: - Link: [I have another Access Code](#)
- Buttons: "Register" and "Cancel"

Two red arrows point to the "Access Code" and "Customer Number" input fields.

 (continued)

- 8 If you were not provided an Access Code, complete all of the required fields (fields with *) on the screen shown below and click **Register**.



Profile Affiliation Email Preferences Locations

Are you an existing Ortho Clinical Diagnostics customer with a valid customer number and located in the United States?

Yes, associate this account with my customer number(s)
[Why do I want to do this?](#)

I have been provided an Access code : Yes No

Please provide your company name, and customer number(s) in the fields below then click register to submit your request.

User Title :
First Name :
Middle Initial :
Last Name :
Email :
Telephone Number :
Company :*
City/Region:*
Zip/Postal Code:*
User Customer Numbers:*
Comments :

*** indicates a required field**

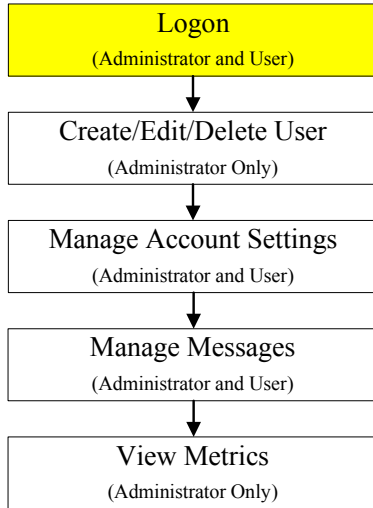
If you do not have the information needed for the required fields, [Please contact an Ortho Plus Support Specialist](#)

By submitting this form, you agree that such information will be governed by Johnson & Johnson [Privacy Policy](#). Your request and the information entered above will be sent to an administrator for evaluation. An email record of this request will be sent to you. Once your request has been completed you will be notified by email.

Register Cancel

You will receive a confirmation email, and further information regarding your account access will be provided in the near future.

Logging In



- 1 To access ORTHO PLUSSM Solutions, go to <http://orthoplus.orthoclinicaldiagnostics.com>, enter your User Name and Password, and click **Log In**.

User Name

Password

- 2 If you have misplaced the Password, it can be recovered by clicking **Forgot Password**. Complete the information on the Forgot Password screen and click **Submit**. You will receive an email with your password. You may also contact your Customer Administrator.

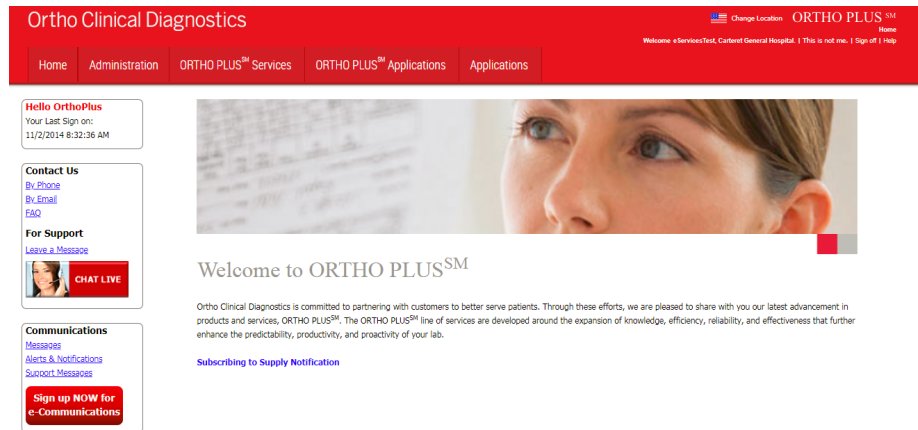
Forgot Password

Please enter your user name

-- Or --

Please enter your email address

The Home Page



Ortho Clinical Diagnostics

Change Location ORTHO PLUSSM


Home Administration ORTHO PLUSSM Services ORTHO PLUSSM Applications Applications

Welcome e-ServicesTest, Carteret General Hospital. | This is not me. | Sign out | Help

Hello OrthoPlus
Your Last Sign on:
11/2/2014 8:32:36 AM

Contact Us
[By Phone](#)
[By Email](#)
[FAQ](#)

For Support
[Leave a Message](#)

 **CHAT LIVE**

Communications
[Messages](#)
[Alerts & Notifications](#)
[Support Messages](#)

Sign up NOW for e-Communications

Welcome to ORTHO PLUSSM

Ortho Clinical Diagnostics is committed to partnering with customers to better serve patients. Through these efforts, we are pleased to share with you our latest advancement in products and services, ORTHO PLUSSM. The ORTHO PLUSSM line of services are developed around the expansion of knowledge, efficiency, reliability, and effectiveness that further enhance the predictability, productivity, and proactivity of your lab.

[Subscribing to Supply Notification](#)

Options on the main page include:

- Home – Return to this screen
- Administration – move to ORTHO PLUSSM Solutions security and account management center
- ORTHO PLUSSM Services – access the specific ORTHO PLUSSM features.
- ORTHO PLUSSM Applications – access features that share the same login, navigation and security features of ORTHO PLUSSM Solutions.

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e-Communications

e-Communications delivers Ortho communications directly to your preferred email address. This service provides a more effective and manageable means of receiving and accessing important Ortho product information.

In order to access e-Communications, you must use one of the following browsers:

Internet Explorer® version 8 or later; Google Chrome™ version 16 or later; Safari® version 5 or later; Mozilla® / Firefox® version 8 or later.

How to Register for e-Communications



- 1 To register for e-Communications, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

User Name

Password

Log In

- 2 Click on **Sign Up NOW for e-Communications** under **Communications** in the left sidebar.



 (continued)

- 3 Click the box next to each mailing address for which you would like to receive communications, then click **Save**.

Associate Mailing Addresses

Save Reset

You have no mailing addresses associated with your account. You will not receive communications electronically until you have associated at least one mailing address. Please select your mailing addresses below, and click save to receive communications electronically.

In order to receive communications electronically, you must link your ORTHO PLUS account to all postal address(es) for which you would like to receive communications. Please select the appropriate address(es) below and save changes.

Note: We will use these postal address(es), in the event that a communication contains materials that are unable to be sent electronically (i.e. software)

If you cannot find your mailing address in the list below or would like to change it, please fill out this [form](#).

Order by: Show Addresses: All Selected

	Customer #		Address
<input type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories.	Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	Immunodiagnosics – Includes VITROS® 3600, ECIQ/ECI, And All MicroWell Products (Including Those Run On VITROS 5600) And Accessories.	Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	ID-Micro Typing Systems™ (ID-MTS™) – Includes Ortho® ProVue Analyzer, ORTHO Workstation™, MTS™ Incubator, MTS™ Centrifuge, And IDMTS™ Gel Cards.	Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	IMMUNOHEMATOLOGY – Includes Ortho® Reagent Red Blood Cells And Other Traditional Bloodbank Products.	Universal Labs 123 Acme Street, Anywhere, USA

Show Addresses: All Selected

- 4 Your address selection(s) will be confirmed.

Associate Mailing Addresses

Your changes were saved successfully. Save Reset



Order by: Show Addresses: All Selected

	Customer #		Address
<input checked="" type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories.	Universal Labs 123 Acme Street, Anywhere, USA

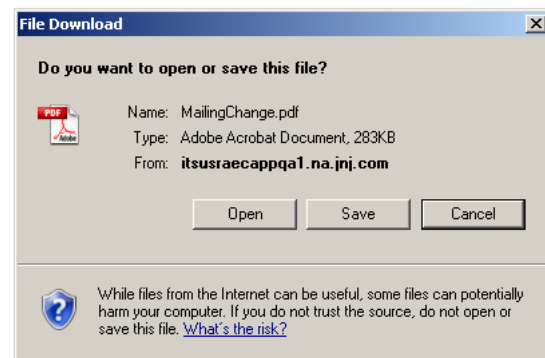
Show Addresses: All Selected



- 5 If you did not find your mailing address in the list provided, click the word **form** in message shown below.

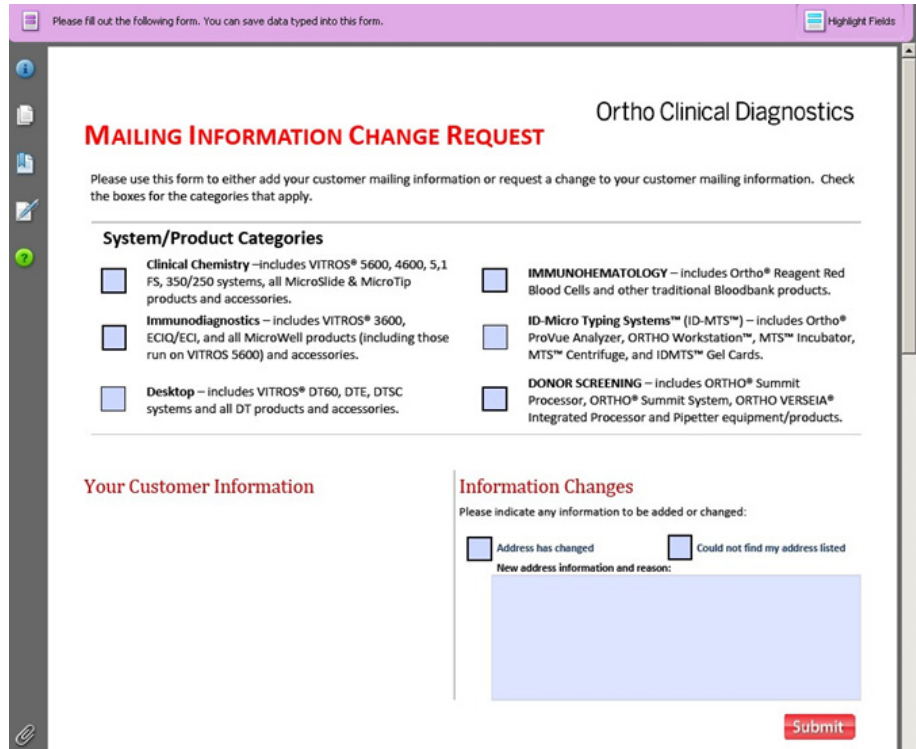
If you cannot find your mailing address in the list below or would like to change it, please fill out this [form](#).

- 6 Click **Open** to access the Mailing Information Change Request form.



 (continued)

7 Complete the Mailing Information Change Request form and click **Submit**.



Please fill out the following form. You can save data typed into this form. Highlight Fields

Ortho Clinical Diagnostics

MAILING INFORMATION CHANGE REQUEST

Please use this form to either add your customer mailing information or request a change to your customer mailing information. Check the boxes for the categories that apply.

System/Product Categories

<input type="checkbox"/> Clinical Chemistry – includes VITROS® 5600, 4600, 5,1 FS, 350/250 systems, all MicroSlide & MicroTip products and accessories.	<input type="checkbox"/> IMMUNOHEMATOLOGY – includes Ortho® Reagent Red Blood Cells and other traditional Bloodbank products.
<input type="checkbox"/> Immunodiagnosics – includes VITROS® 3600, ECIQ/ECI, and all MicroWell products (including those run on VITROS 5600) and accessories.	<input type="checkbox"/> ID-Micro Typing Systems™ (ID-MTS™) – includes Ortho® ProVue Analyzer, ORTHO Workstation™, MTS™ Incubator, MTS™ Centrifuge, and IDMTS™ Gel Cards.
<input type="checkbox"/> Desktop – includes VITROS® DT60, DTE, DTSC systems and all DT products and accessories.	<input type="checkbox"/> DONOR SCREENING – includes ORTHO® Summit Processor, ORTHO® Summit System, ORTHO VERSEIA® Integrated Processor and Pipetter equipment/products.

Your Customer Information

Information Changes
Please indicate any information to be added or changed:

Address has changed Could not find my address listed

New address information and reason:

Submit

You will receive an email confirming your new address selection.

How to Manage e-Communications Access

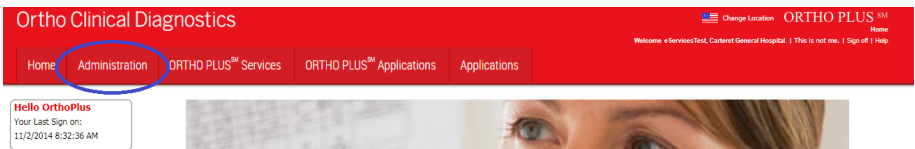


- 1 To manage your access to e-Communications, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

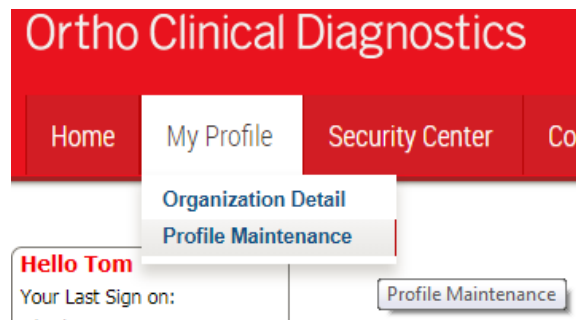
User Name

Password

- 2 From the top menu select **Administration**.



- 3 From the **My Profile** drop down menu, select **Profile Maintenance**.



 (continued)

- Click the **Mailing Addresses** tab, then click on the link **Manage your Electronic Communications (e-Communications) Mailing address association**

Home My Profile Security Center Communications Metrics

Menu > [Communications](#) > [Email Settings](#)

Profile Maintenance for:

Profile	Email Preferences	Locations	Mailing Addresses
Manage your Electronic Communications (e-Communications) Mailing address association			
Customer #			Mailing Address
00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories.		Universal Labs 123 Acme Street
00003399	ID-Micro Typing Systems™ (ID-MTS™) – Includes Ortho® ProVue Analyzer, ORTHO Workstation™, MTS™ Incubator, MTS™ Centrifuge, And IDMTS™ Gel Cards.		Universal Labs 123 Acme Street
00003399	Immunodiagnosics – Includes VITROS® 3600, ECIQ/ECI, And All MicroWell Products (Including Those Run On VITROS 5600) And Accessories.		Universal Labs 123 Acme Street
00003399	IMMUNOHEMATOLOGY – Includes Ortho® Reagent Red Blood Cells And Other Traditional Bloodbank Products.		Universal Labs 123 Acme Street

- To deselect a current mailing address, click in the checked box next to the address to remove the check mark

Order by: [Customer # and Product](#) Show Addresses: All Selected

	Customer #		Address
<input checked="" type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories.	Universal Labs 123 Acme Street, Anywhere, USA

Show Addresses: All Selected

Order by: [Customer # and Product](#) Show Addresses: All Selected

	Customer #		Address
<input type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories.	Universal Labs 123 Acme Street, Anywhere, USA

Show Addresses: All Selected


 (continued)

- To change the mailing addresses selected, click the **All** button next to Show Addresses.

Order by: Show Addresses: All Selected

	Customer #	Address
<input checked="" type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories. Universal Labs 123 Acme Street, Anywhere, USA

Show Addresses: All Selected



- Click the box next to each mailing address for which you would like to receive communications and click **Save**.

If you cannot find your mailing address in the list below or would like to change it, please fill out this [form](#).

Order by: Show Addresses: All Selected

	Customer #	Address
<input type="checkbox"/>	00003399	Clinical Chemistry – Includes VITROS® 5600, 4600, 5,1 FS, 350/250 Systems, All MicroSlide & MicroTip Products And Accessories. Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	Immunodiagnostics – Includes VITROS® 3600, ECIQ/ECI, And All MicroWell Products (Including Those Run On VITROS 5600) And Accessories. Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	ID-Micro Typing Systems™ (ID-MTS™) – Includes Ortho® ProVue Analyzer, ORTHO Workstation™, MTS™ Incubator, MTS™ Centrifuge, And IDMTS™ Gel Cards. Universal Labs 123 Acme Street, Anywhere, USA
<input type="checkbox"/>	00003399	IMMUNOHEMATOLOGY – Includes Ortho® Reagent Red Blood Cells And Other Traditional Bloodbank Products. Universal Labs 123 Acme Street, Anywhere, USA

Show Addresses: All Selected

- If you want to create a new mailing address, click on the word **form**, then **Open** and complete the Mailing Information Change Request form and click **Submit**.

If you cannot find your mailing address in the list below or would like to change it, please fill out this [form](#).

How to Manage Messages



- 1 To manage your messages, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

User Name

Password

Log In

- 2 Click on **View Messages** under **Communications** in the left sidebar.

Communications
[View Messages \(5\)](#)
[View Alerts](#)

- 3 You can view the list of messages in your mailbox and click on any message to open it.

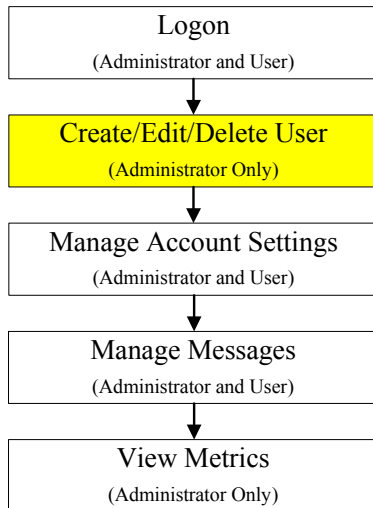
Alerts | Messages (10)

From	Applications	Subject
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-023 - Important Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-023 - Important Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-022 - Urgent Product Correction Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-022 - Urgent Product Correction Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-021 - Urgent Product Correction Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-004-01 - Test_qa
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-016 - Important Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-015 - Important Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-013 - Urgent Product Correction Notification
orthoplusecomm@its.jnj.com	e-Communications	ID: 2013-014 - Important Notification

4

Customer Administrator and User Functions

How to Add a New User



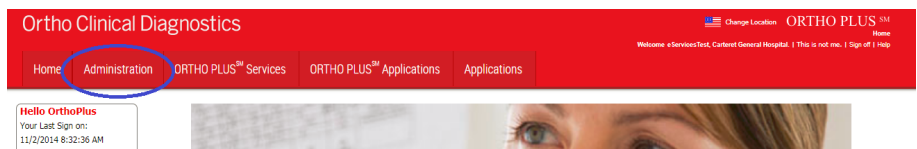
- 1 To create a new user for your organization, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

User Name

Password

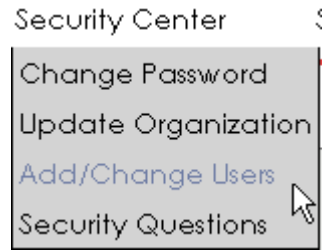
Log In

- 2 From the top menu select **Administration**.

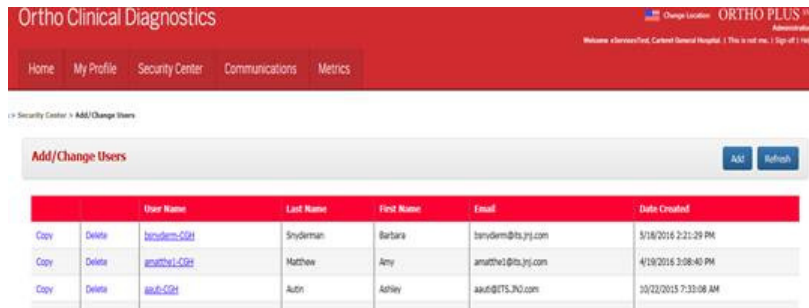
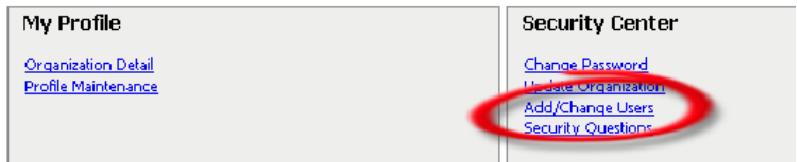


 (continued)

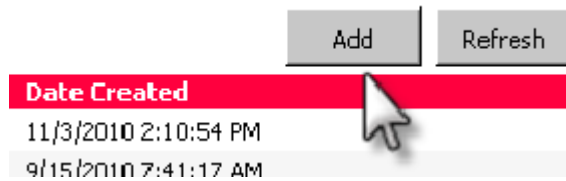
- 3 From the **Security Center** drop down menu, select **Add/Change Users**.



- 4 Or click on **Add/Change Users** in the **Security Center** box.



- 5 To create a new user, click on the **Add** button.





(continued)

- 6 On the **Profile** tab enter a unique User Name and password. Reconfirm the password and enter all required information (denoted by *). Select a User Name that is easy for the user to remember, such as a network logon or email address.

Profile Maintenance for:

Profile	Affiliation	Email Preferences	Locations	Features	Access Levels
Organization Name : Framework-Testing					
User Name:	<input type="text" value="BReuben"/>				
Enter new password :	<input type="password" value="*****"/>	Confirm new password:	<input type="password" value="*****"/>		
Account Status:	<input type="text" value="Active"/>				
User Role:	<input type="text" value="User"/>				
User Title :	<input type="text" value="Lead Tech"/>				
First Name : *	<input type="text" value="William"/>				
Middle Initial :	<input type="text" value="E"/>				
Last Name : *	<input type="text" value="Reuben"/>				
Telephone Number: *	<input type="text" value="585-555-1212"/>	Ext.:	<input type="text"/>		
Fax Number:	<input type="text"/>	Ext.:	<input type="text"/>		
Changed By:	eServicesAdmin				
Date Created:					
Date Last Changed:					

- 7 Enter your organization's name and address on the **Affiliation** tab.

Profile Maintenance for: BReuben

Profile	Affiliation	Email Preferences	Locations	Features	Access Levels
Company/Affiliation :	<input type="text" value="Framework Testing Labs"/>				
Street :	<input type="text" value="2100 Elm St"/>				
	<input type="text"/>				
	<input type="text"/>				
City :	<input type="text" value="Rochester"/>				
State/Territory :	<input type="text" value="NEW YORK"/>				
Province (International) :	<input type="text"/>				
Zip/Postal Code :	<input type="text" value="14610"/>				
Country :	<input type="text" value="UNITED STATES"/>				

 (continued)

8 Enter the **Email Preferences** for the new user on the next tab.

Profile Maintenance for: BReuben

Save Cancel

Profile Affiliation **Email Preferences** Locations Features Access Levels

Email address : * breuben@gmail.com

I would like to receive ongoing news and announcements about Ortho-Clinical Diagnostics products and services via email.
 I would like to be removed from ongoing news and announcements about Ortho-Clinical Diagnostics products and services via email.

Select the item(s) of interest to you. Select All

General Ortho-Clinical Diagnostics News and Announcements
 WITROS® 5,1 FS
 WITROS® 350

9 If multiple sites exist for your organization, assign the appropriate site(s) on the **Locations** tab.

Profile Maintenance for: BReuben

Save Cancel

Profile Affiliation Email Preferences **Locations** Features Access Levels

Select All

Default	Customer Number	Customer Locations	AllowAccess
<input checked="" type="radio"/>	00005005	ACME Clinical Labs 100 Maple Street Rochester, NY 14610 US	<input checked="" type="checkbox"/>
<input type="radio"/>	00006556	Framework Test Labs 2100 Elm Street Rochester, NY 14610 US	<input checked="" type="checkbox"/>

 (continued)

- 10 On the **Features** tab, you can allow the new user access to one or multiple ORTHO PLUSSM features.

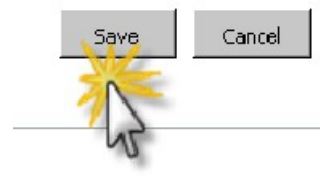
Profile Maintenance for: BReuben

Save Cancel

Profile Affiliation Email Preferences Locations **Features** Access Levels

Feature	Online	AllowAccess	Select All <input type="checkbox"/>
Complaint Form	True	<input type="checkbox"/>	
Donor Screening Credit	True	<input type="checkbox"/>	
Drop Box	True	<input type="checkbox"/>	
Inventory Management Administrator	True	<input type="checkbox"/>	
Inventory Management	True	<input checked="" type="checkbox"/>	
Productivity Management Reports	True	<input checked="" type="checkbox"/>	
Quality Management Reports	True	<input checked="" type="checkbox"/>	
Reports	True	<input checked="" type="checkbox"/>	

- 11 Click on the **Save** button to create the new User and to update Features and Locations.



- 12 On the Access Levels tab, you can specify the User access to Features by Ship To location. The user will automatically have Read/Write access unless the box for Read Only is selected.

Profile Maintenance for: BReuben

Save Cancel

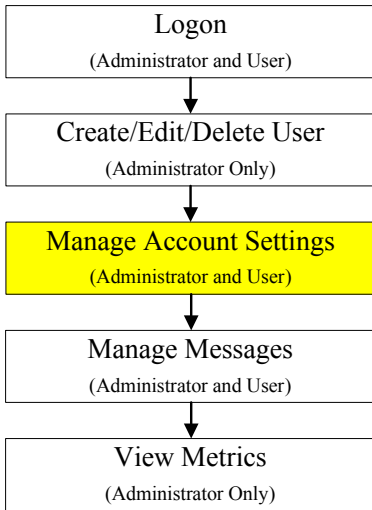
Profile Affiliation Email Preferences Locations Features **Access Levels**

Location	Feature Access	Access Properties
(All Locations)	<input checked="" type="checkbox"/> Inventory Management	<input checked="" type="checkbox"/> Group Admin <input type="checkbox"/> Read Only
ACME Clinical Labs	<input checked="" type="checkbox"/> Productivity Management Reports	<input type="checkbox"/> Read Only
	<input checked="" type="checkbox"/> Quality Management Reports	<input type="checkbox"/> Read Only
Framework Testing Labs	<input type="checkbox"/> Productivity Management Reports	<input type="checkbox"/> Read Only
	<input checked="" type="checkbox"/> Quality Management Reports	<input checked="" type="checkbox"/> Read Only
Rochester Testing Labs	<input type="checkbox"/> Productivity Management Reports	<input type="checkbox"/> Read Only
	<input checked="" type="checkbox"/> Quality Management Reports	<input checked="" type="checkbox"/> Read Only

- 13 Click on the **Save** button to create the new Access Levels.

- 14 When logging on for the first time, the new user will be prompted to change his/her password.

How to Manage Account Settings

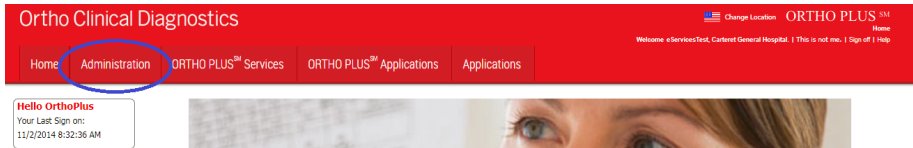


1 To manage your account settings, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

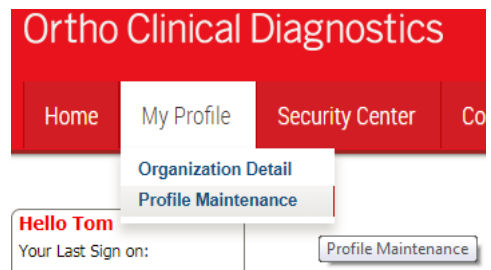
User Name

Password

2 From the top menu select **Administration**.



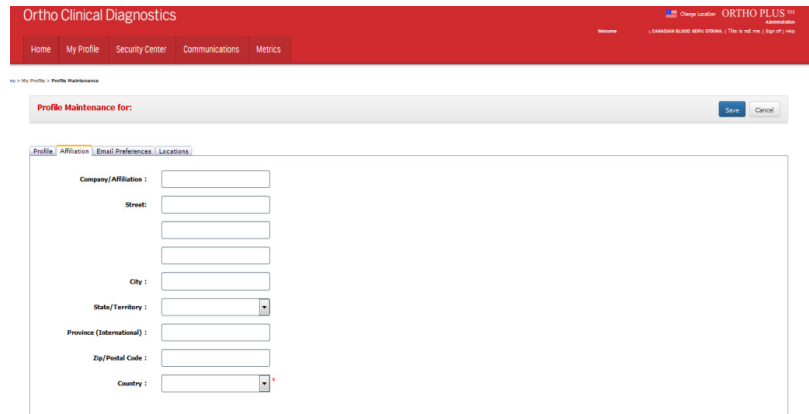
3 From the **My Profile** drop down menu, select **Profile Maintenance**.



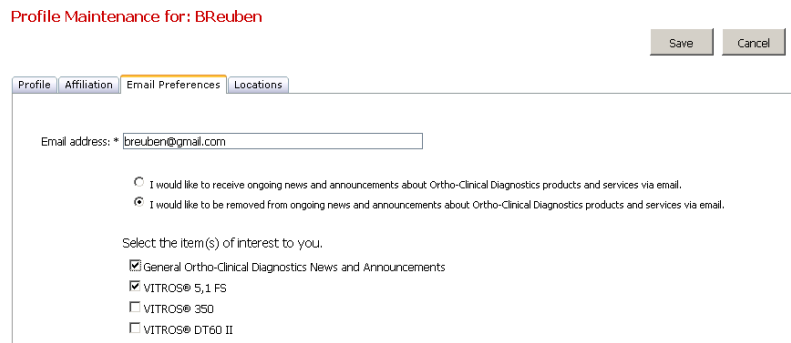
 (continued)

- 4 Click the **Affiliation** tab to update your company and address information.

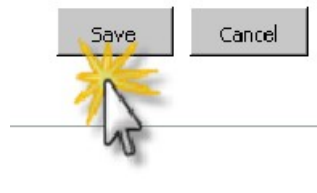
Note: This information is not used by any ORTHO PLUSSM services.



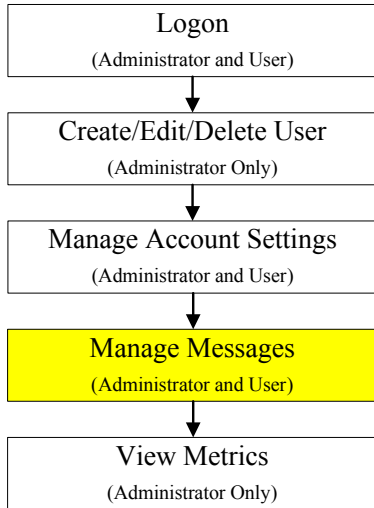
- 5 Update your **Email Preferences** including your email address and selection of Ortho News and announcements.



- 6 Click on the **Save** button to update your information.



How to Manage Alerts



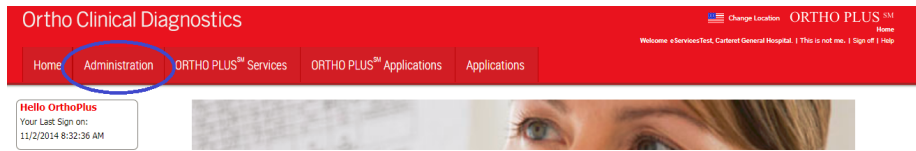
1 To setup and manage your messages, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

User Name

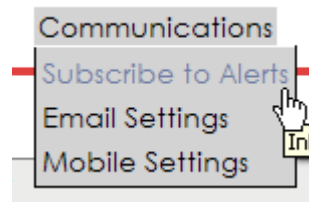
Password

Log In

2 From the top menu select **Administration**.



3 From the **Communications** menu, select **Subscribe to Alerts**.





 (continued)

- Choose the Alerts under Feature (Order Receipt Alerts, Shipping Status Alerts, and Shipping Status Updates) you want to receive and the appropriate Alert Type for each (Chemistry and Immunodiagnostic, Donor Screening or Blood Banking).

Subscribe to Alerts

Save Cancel

Email and SMS text messages will be sent in your preferred language: **English** [Change preferred language.](#)



Feature	Email 	SMS 	Alert Type	Select Sites for Alert
Order Receipt Alerts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	Select Sites
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	
Shipping Status Alerts	<input type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	
Shipping Status Updates	<input type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	

- Choose the sites for each alert. Click **Save** before leaving the screen.

Subscribe to Alerts

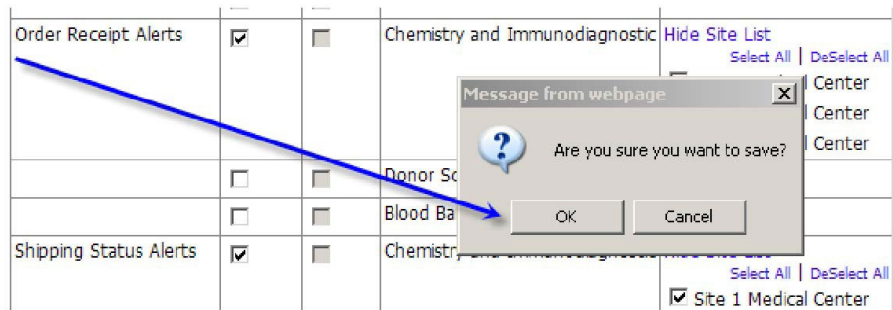
Save Cancel

Email and SMS text messages will be sent in your preferred language: **English** [Change preferred language.](#)

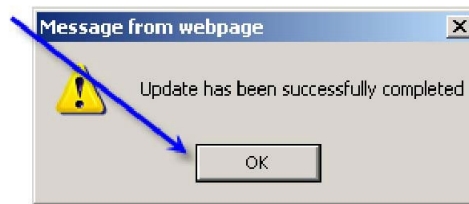
Feature	Email 	SMS 	Alert Type	Select Sites for Alert
Order Receipt Alerts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	Hide Site List Select All DeSelect All <input checked="" type="checkbox"/> Site 1 Med Center
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	
Shipping Status Alerts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	
Shipping Status Updates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chemistry and Immunodiagnostic	
	<input type="checkbox"/>	<input type="checkbox"/>	Donor Screening	
	<input type="checkbox"/>	<input type="checkbox"/>	Blood Banking	

 (continued)

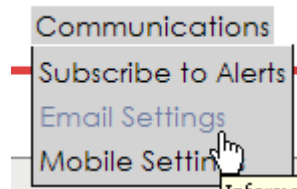
6 Click **OK**.



7 Click **OK**.



8 From the **Communications** menu, select **Email Settings**.





(continued)

- 9 Email Settings – allows you to edit your email address and update your preferences for email notifications from Ortho. This is an identical screen to that seen in the Profile Maintenance and Add/Change Users screens.

Profile Maintenance for: BReuben

Profile | Affiliation | **Email Preferences** | Locations

Email address: *

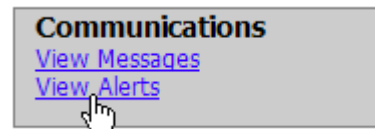
I would like to receive ongoing news and announcements about Ortho-Clinical Diagnostics products and services via email.
 I would like to be removed from ongoing news and announcements about Ortho-Clinical Diagnostics products and services via email.

Select the item(s) of interest to you.

General Ortho-Clinical Diagnostics News and Announcements
 VITROS® 5,1 FS
 VITROS® 350
 VITROS® DT60 II

- 10 Click on the **Save** button to update your preferences.

- 11 Click on **View Alerts** under **Communications** in the left sidebar.



View Alerts is a “mailbox” where you can view system generated messages that have been sent to you through the embedded mailbox or email.

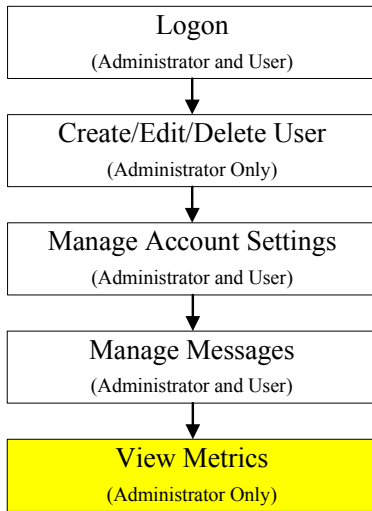
Alerts (356) | Messages

Select All | [Hide Selected](#) | [Unhide Selected](#)

Select	From	Applications	
<input type="checkbox"/>	ORTHO PLUS SM Inventory Management	Inventory Management	e-Connectivity® Data Alert -
<input type="checkbox"/>	ORTHO PLUS SM Inventory Management	Inventory Management	e-Connectivity® Data Alert -
<input type="checkbox"/>	ORTHO PLUS SM Inventory Management	Inventory Management	e-Connectivity® Data Alert -
<input type="checkbox"/>	ORTHO PLUS SM Inventory Management	Inventory Management	Reconciliation Alert - SPECIAL

- 12 Mobile Settings are not currently available, but are being developed as a future enhancement to ORTHO PLUSSM Solutions.

How to View Metrics

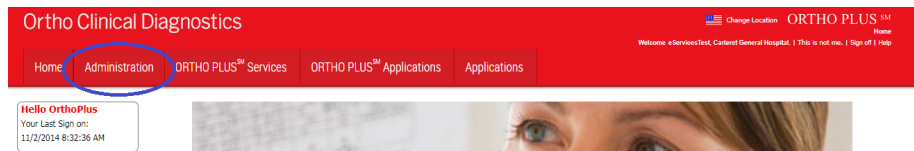


1 To view metrics for logon activity and usage, log on to ORTHO PLUSSM Solutions, enter your User Name and Password, and click **Log In**.

User Name

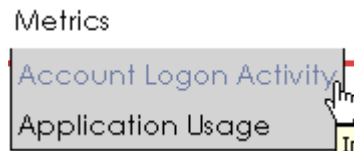
Password

2 From the top menu select **Administration**.



3 Account Logon Activity enables the Customer Administrator to see which accounts are logging into the ORTHO PLUSSM Solutions account at the Organization level.

From the **Metrics** menu, select **Account Logon Activity**.



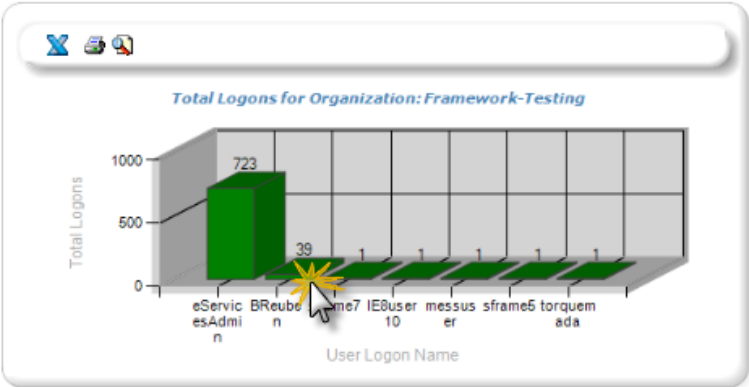
(continued)

4 The Customer Administrator will see a bar chart showing each user's number of logons for the time period selected.

Account Logon Activity

Start Date: End Date:

Logon Summary: Framework-Testing

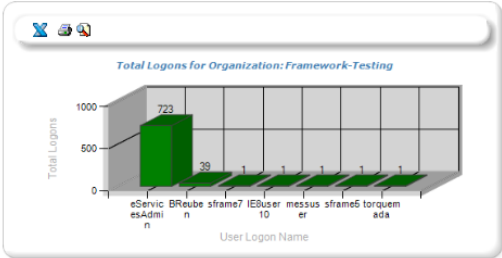


5 To view detailed logon activity for a specific user, click on the bar chart to create a table with logon details for the user.

Account Logon Activity

Start Date: End Date:

Logon Summary: Framework-Testing



Logon Detail: Reuben, William Total Logons: 39

Logon Date/Time	Logon Name	Logon Status	Application
4/18/2011 1:34:55 PM	BReuben	Success	ORTHO PLUS
4/18/2011 1:18:52 PM	BReuben	Success	ORTHO PLUS
4/18/2011 1:08:52 PM	BReuben	Success	ORTHO PLUS
4/18/2011 12:56:27 PM	BReuben	Success	ORTHO PLUS
4/18/2011 12:06:43 PM	BReuben	Success	ORTHO PLUS

 (continued)

- 6 A User selecting Account Logon Activity will see a table listing all of his/her logons.

Account Logon Activity

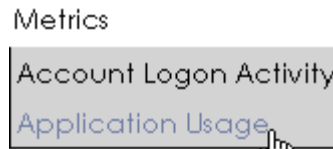
Start Date  End Date 

Logon Detail: Hurley, Terrence Total Logons: 3



Logon Date/Time	Logon Name	Logon Status	Application
4/18/2011 4:28:23 PM	thurley	Success	ORTHO PLUS
4/18/2011 4:23:52 PM	thurley	Success	ORTHO PLUS
4/18/2011 4:23:14 PM	thurley	Success	ORTHO PLUS

- 7 Application Usage enables the Customer Administrator to see which applications have been accessed within the organization.

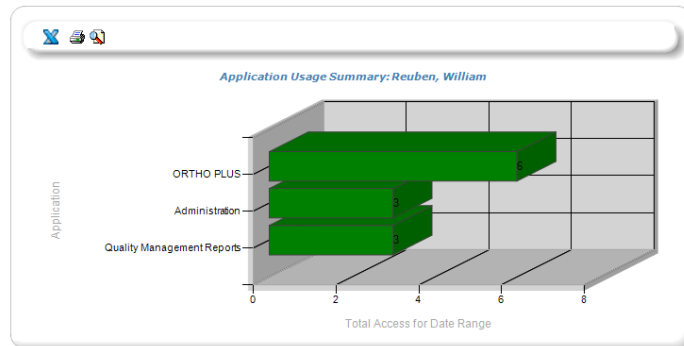
From the **Metrics** menu, select **Application Usage**.



Application Usage

Start Date  End Date 

Application Usage Summary: Reuben, William



5

Managing Automatic Alerts

ORTHO PLUSSM Solutions Alerts

One of the features of ORTHO PLUSSM Solutions is that it provides automated alerts.

In order to protect confidential customer information, all proactive notifications are stored within your password protected ORTHO PLUSSM Solutions account, and new alerts are accompanied by a notification email that will be sent to your email address based on the alerts you have selected to receive (see How to Manage Alerts).

Each individual with an account receives selected alerts and manages their own mailbox. You will receive an email notification to the address on file upon receipt of one or more new alerts.

The list of alerts includes:

- Order Receipt Alert
- Shipping Status Alert
- Shipping Status Update

Order Receipt Alert

The Order Receipt Alert will be sent when a new order is found in the system, which looks for new orders throughout the business day. The alert includes information about your order such as order number, items and quantities.

Note: Any discrepancies between the information in the Order Receipt Alert and the order you placed should be reported to Customer Service immediately.

Shipping Status Alert

The Shipping Status Alert will be sent when an order that Ortho receives is placed on hold due to inventory availability. This alert will only be sent if an item on your order is not being filled. The Shipping Status Alert will include only information about the specific item such as original quantity, shipped quantity and expected inventory availability date.

Shipping Status Update

The Shipping Status Update will be sent when specific items listed in a previous Shipping Status Alert have been released from insufficient inventory hold and will be made ready for shipment.

Ortho Clinical Diagnostics

Ortho-Clinical Diagnostics

