WAYSTAR

User Management Guide

V6 – June 2025

Contents

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Overview

Go to **ACCOUNT** > **Security**.

Waystar's Security Administration System allows your organization to define which areas of the Waystar system each user can access. To accomplish this, **one user** in your organization is assigned to be your organization's Domain Administrator while others can be assigned the role of Security Manager.

The safety and security of your information is Waystar's highest priority, that is why we follow strict security protocols to prevent any unauthorized access to your data. In the event you need to change your Domain Administrator, Waystar will reassign this function only after receiving a written request on your company's letterhead.

Domain Administrator and Security Manager(s)

The Domain Administrator and the Security Manager(s) can do the following:

- Add new users to the system
- Manage roles
- Set permissions, which indicates what each user is able to do within the system
- Reset passwords for users who have forgotten their password
- Inactivate users from the system
- Unlock users (after five consecutive failed logins, the system will automatically lock a user)
- Manage domain security settings/password rotation.

Anyone who uses the site must be set up as a user with their own username and password; this is for your security and ours.

Users will be deactivated if they do not log in to Waystar within a specified time. The default setting is one year but can be set to as little as one month. If the Domain Administrator is deactivated, a Security Manager can reactivate the account.

Note: Be sure to let your users know who the Domain Administrator and Security Manager(s) are and that users can contact them to have a password reset. Also, if the user has confirmed their email address via the Waystar portal, they can reset their own password when logging into the portal and clicking the **Forgot your username or password?** link on the WELCOME login screen.

Setting up Security Managers

IMPORTANT: Waystar strongly recommends that you designate ***at least one Security Manager*** with permissions to add users and reset passwords in the event that the Domain Administrator is not available when a user needs to reset their password.

To set users as Security Managers, see the Setting a user's role section.

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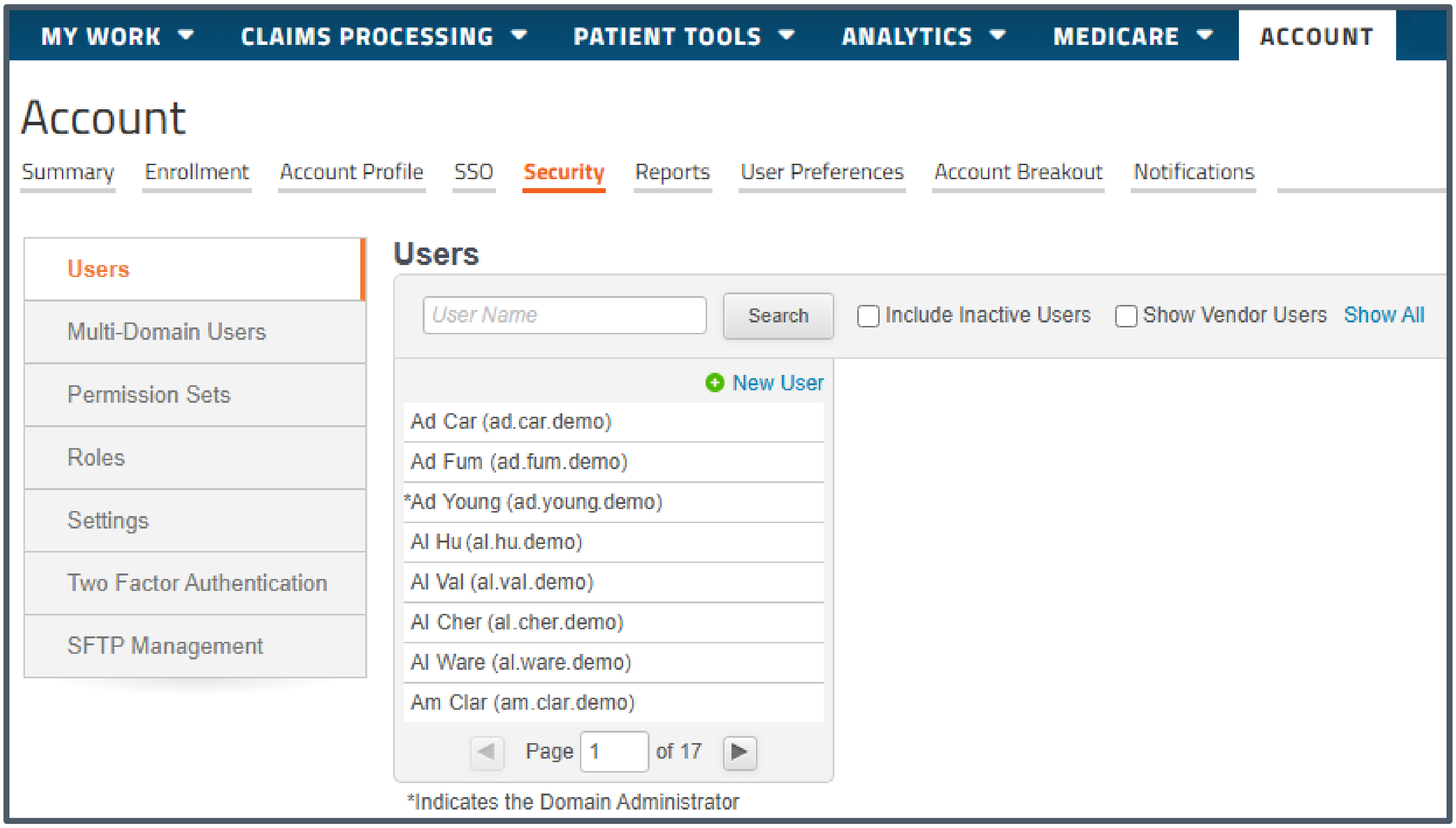
Managing users

This section explains for the Domain Administrator and Security Managers how to manage security settings in the Waystar portal.

Accessing the Users screen

Note: All Domain Administrators and Security Managers have access to the ACCOUNT > **Security** tab. However, not all end-users have access to this tab, which is based on your organization's settings.

Go to **ACCOUNT** > **Security** > **Users**. This is where you will manage all your users.



From the Users screen, you can:

- Add new users
- Set general information
- Set accounts
- Set permissions
- Set roles
- Reset passwords
- Update or deactivate any users.

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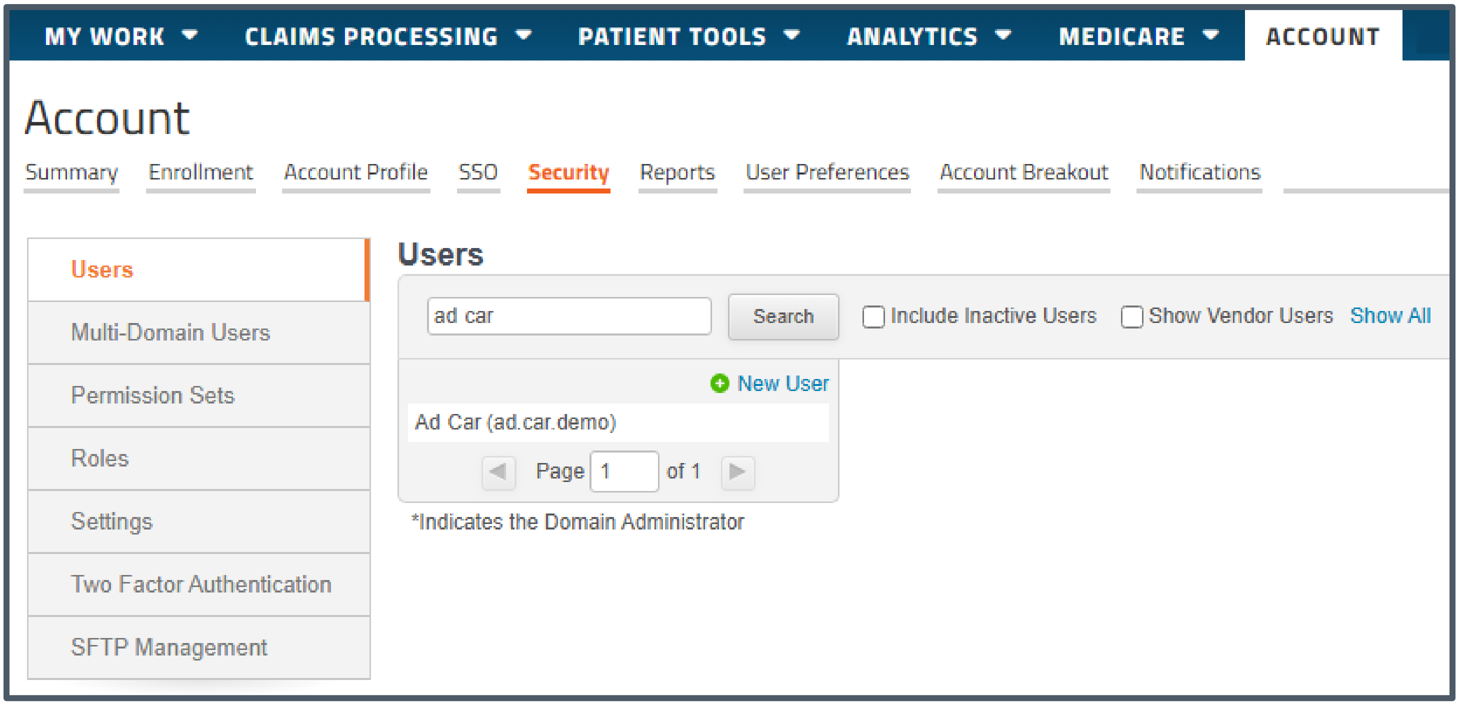
Finding a user

This section explains how to find a user within your list.

To find a user, go to the **ACCOUNT** > **Security** > **Users** screen and perform any of the following:

- **Additional users**: You can include inactive and vendor users in your list by selecting the **Include Inactive Users** and/or **Show Vendor Users** checkboxes at the top of the list. When selecting, those users will also appear in search results.
- **Scroll**: You can scroll the list using the page forward and backward arrow buttons at the bottom of the list.
- **Page**: You can go directly to a page by putting the page number into the **Page** field, and then clicking the forward arrow button.
- **Search**: In the Search field at the top of the list, type their name in the Search field, and then click the **Search** button. You can search by their entire name, their first or last name, or by using a partial match.
- **Show All**: Click the **Show All** link to remove any search criteria and redisplay the entire list of users.

The following example shows a search by a user's full name.



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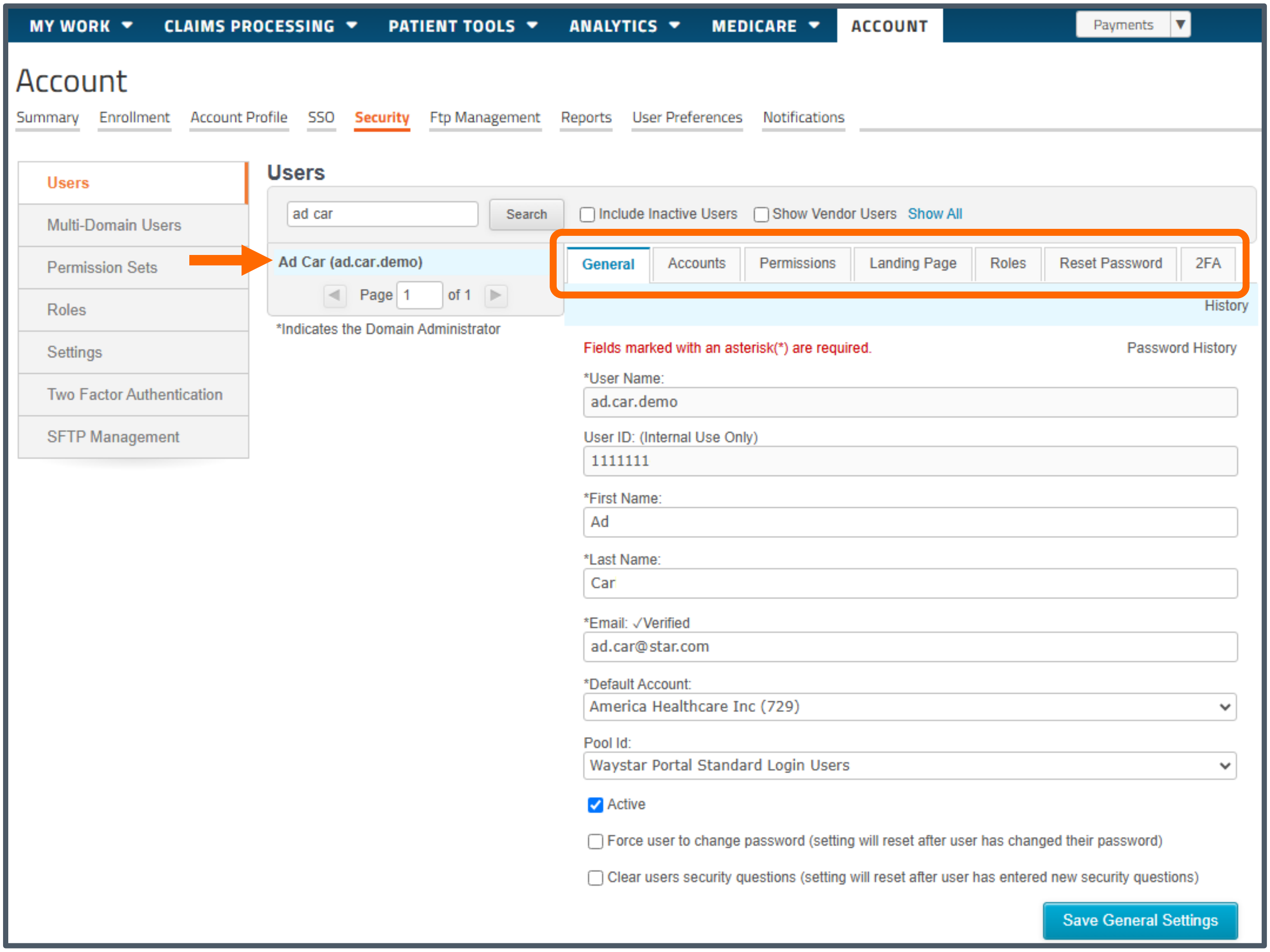
Understanding the user tabs

This section provides an overview of the user tabs that will appear after you find a user and click their name.



Click the following links to go to the corresponding section in this guide.

- General: Use to review and update a user's general information, such as their name, default account, and whether they are active.
- Accounts: Use to grant permissions to a specific account. When a user has a permission, that permission is applied to all accounts to which the user has access.
- Permissions: Use to set permissions for a user for accounts they were granted access to.
- Landing Page: Use to set the default Waystar portal landing page for the user.
- Roles: Use to set the roles in which a user can function.
- Reset Password: Use to change the password of a user.
- 2FA: Use to set a one-time code for users who lose access to their account.

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Using the General tab

The **ACCOUNT** > **Security** > **Users** tab is where you perform the most basic user management security tasks, such as adding, updating, activating, and inactivating users.

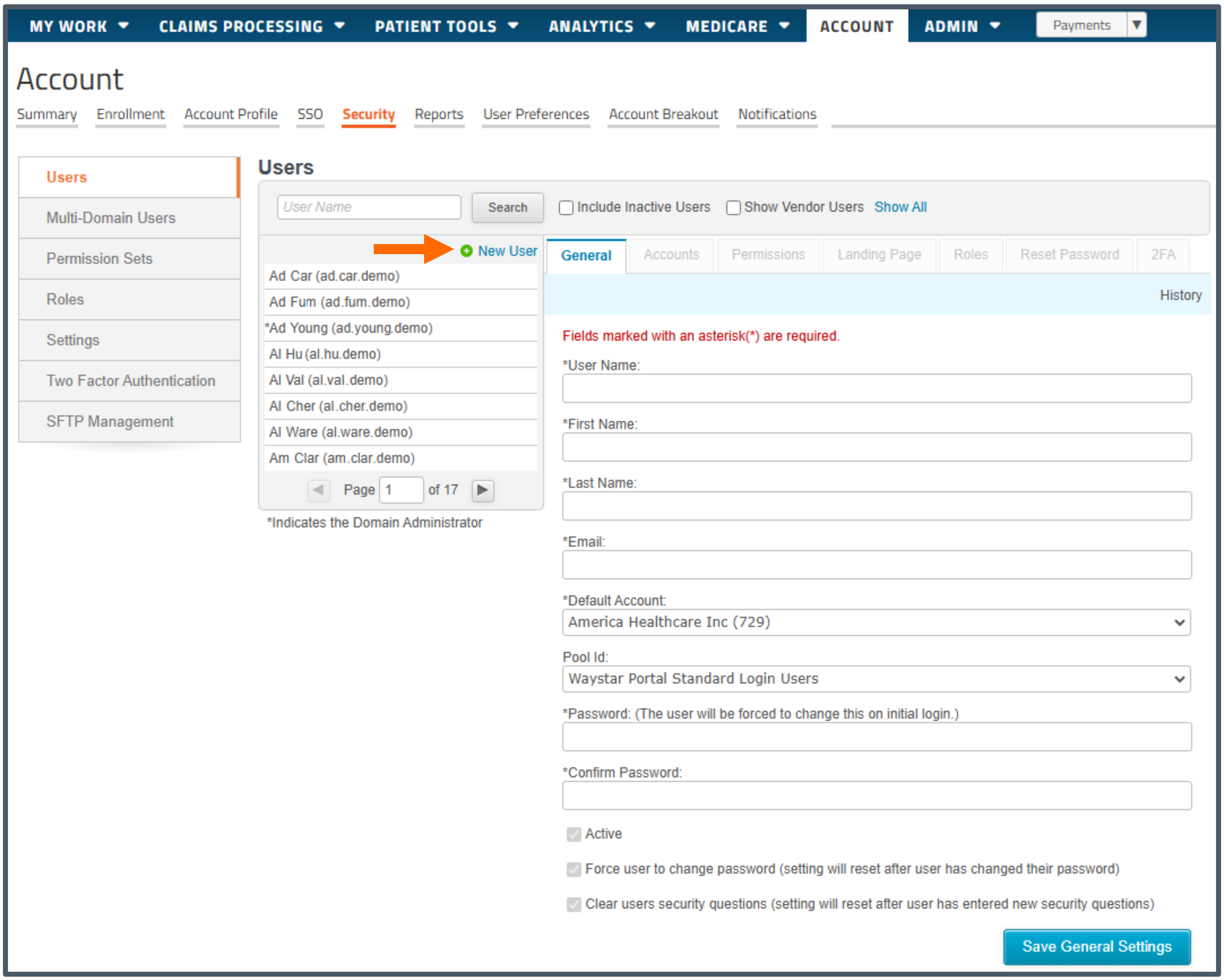
Adding a new user

This section explains how Domain Administrators and Security Managers can add a new user so that you can give them access to your organization's Waystar portal.

To add a new user:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Click the **New User** link.

   The General tab will display mostly blank fields.



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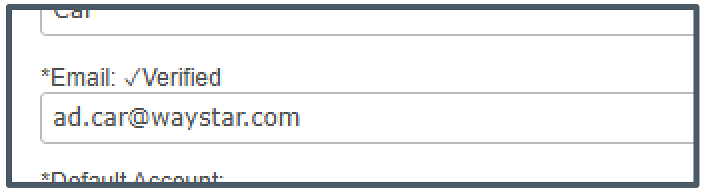
3. Enter the following information:

    - **User Name**: Provide a username. We recommend the user's first and last names with a period (dot) in the middle, such as jill.smith. The maximum allowable length is 100 characters and can include numeric and special characters, except for < > * % & : ? \
    - **First Name**: Provide the user's first name.
    - **Last Name**: Provide the user's last name.
    - **Email**: Provide the user's company email address. The email address must be verified by the user when they first log into the Waystar portal. When verified, the Verified icon will appear next to the field.



    - **Default Account**: If your organization has multiple accounts, select from the dropdown the account you want the user to have as their default. If your organization has a single account, it will automatically populate in the field.
    - **Pool Id**: Establishes how you expect the user to authenticate their login to the Waystar portal.
        – **Waystar Portal Standard Login Users**: A user who uses the standard Waystar login screen.
        – **Real-time API Users**: A user who uses a third-party tool, such as Okta, for login authentication.
    - **Password/Confirm Password**: This is a temporary password that is valid for 24 hours; the system will force the user to change this password.
        – Contains at least 15 characters
        – Contains at least one number
        – Contains at least one uppercase AND one lowercase character
        – Contains at least one special character
        – Cannot contain any of the following special characters **< > * % & : \ ?**
        – Cannot contain the user's first name, last name, or Waystar username
        – Cannot have consecutively repeating characters
        – Cannot repeat previous 24 passwords
        – Cannot be a commonly used password.

      For additional information, see the Setting password options section.
    - **Active**: Selected by default, when you add the user, they will automatically be active.
    - **Force user to change password**: Selected by default, the system will force the user to change their password when they first log in. After they change their password, this checkbox will be clear (not selected).
    - **Clear users security questions**: Selected by default, the system will ask the user for security questions when they first log in. After they answer the questions, this checkbox will be clear (not selected).

4. Click the **Save General Settings** button.

   As shown in the following section, the system will automatically generate and display the user's user ID.

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Updating a user's information

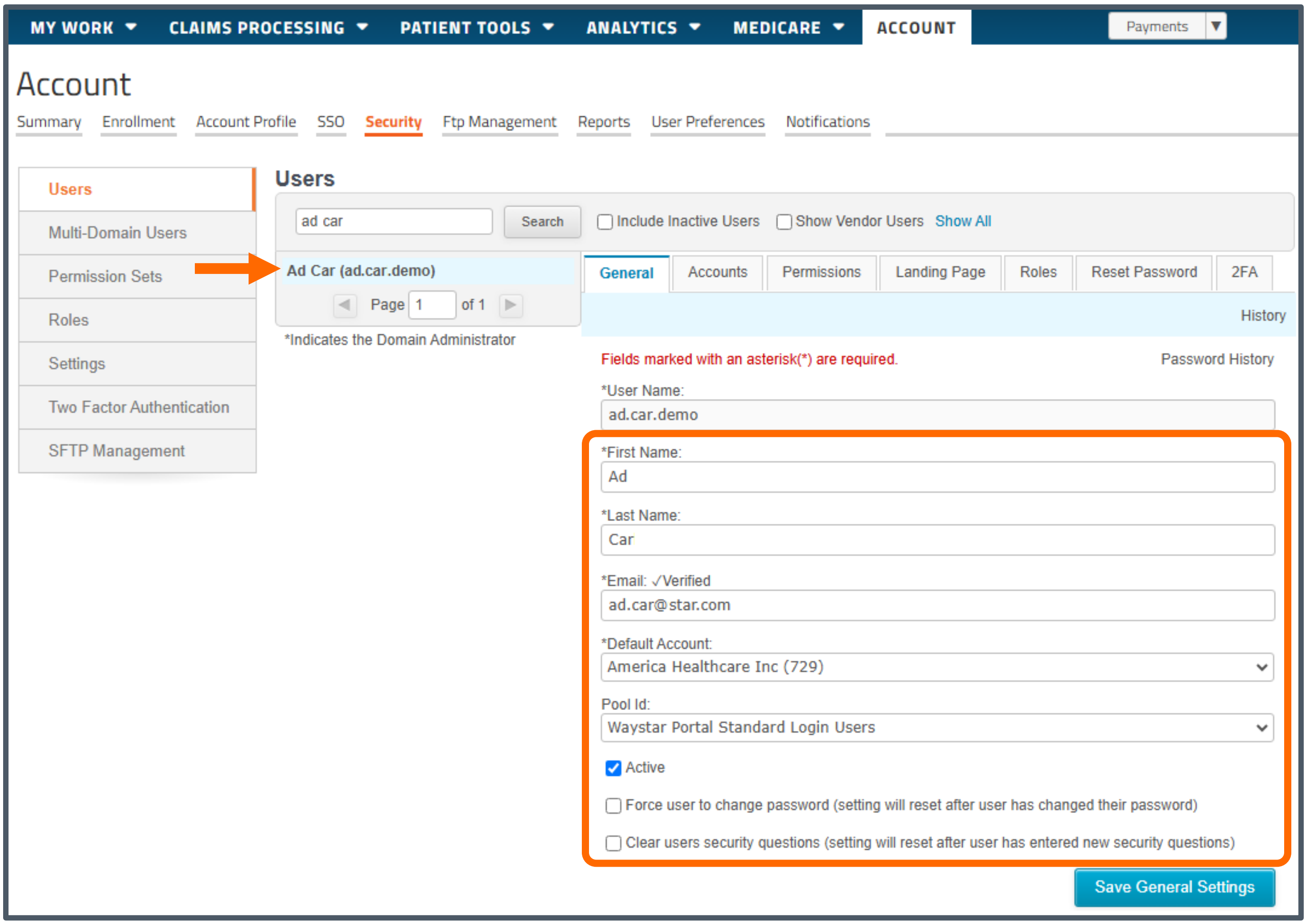
This section explains how Domain Administrators and Security Managers can update a user's general information.

To change a user's information:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.

   The General tab will display the user's information.
3. From the General tab, change field information as appropriate. For field descriptions, see the Adding a new user section.

   Note: You cannot change the User Name field.
4. When finished updating fields, click the **Save General Settings** button.



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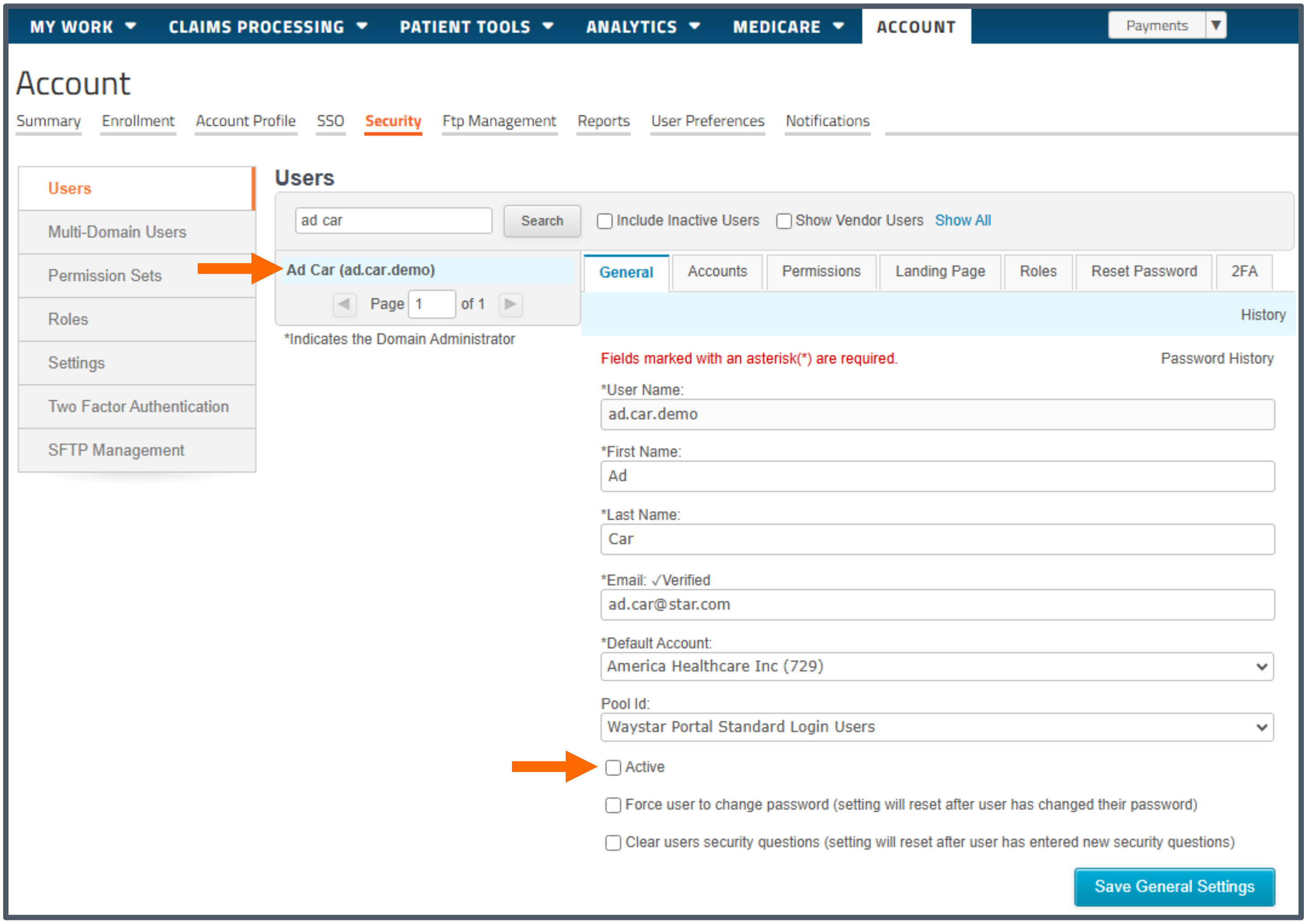
Deactivating a user

This section explains how Domain Administrators and Security Managers can deactivate a user, which will prevent that user from logging into your organization's Waystar portal.

To deactivate a user:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. From the General tab, clear (unselect) the **Active** checkbox.
4. Click the **Save General Settings** button.
5. To reactivate the user account, select the **Active** button and click the **Save General Settings** button.



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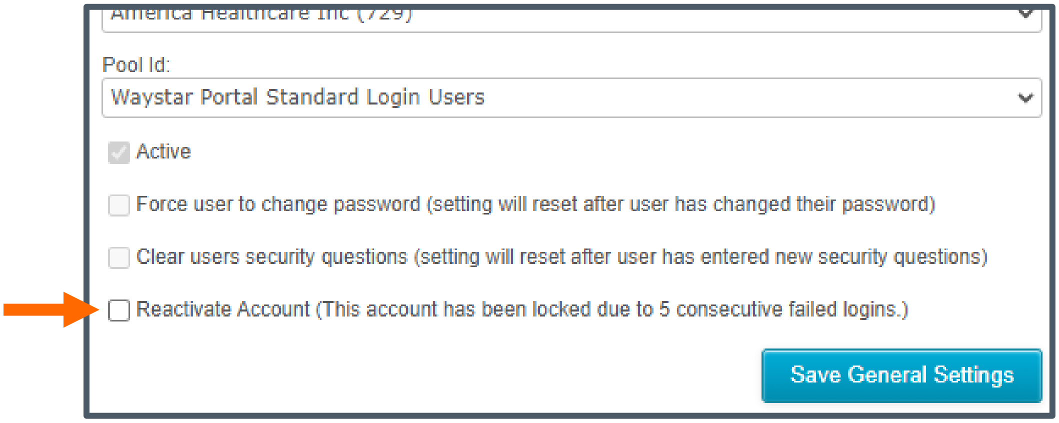
Reactivating users

This section explains how Domain Administrators and Security Managers can reactivate (unlock) a user after the user attempts ***five*** unsuccessful login attempts.

The Waystar system will display a notification message on the Waystar login screen when the user has failed five login attempts and their account is locked.

To reactivate (unlock) a user:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. From the General tab, select the **Reactivate Account (This account has been locked due to 5 consecutive failed logins.)** checkbox.
4. Click the **Save General Settings** button.



The Reactivate Account checkbox will disappear, and the **Active** checkbox will be active again.

5. Notify the user that you have unlocked their account.

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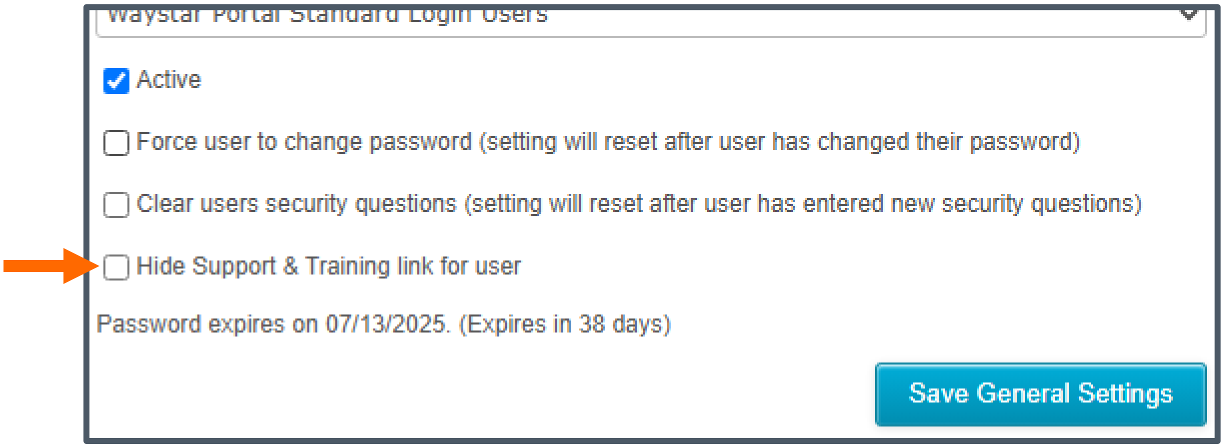
Hiding the Support and Training Center link

This option is primarily for Waystar Partners who need to hide the Support and Training Center (STC) from their users.

IMPORTANT: For our client organizations, we strongly recommend that you DO NOT hide the STC from your users so that they have access to valuable help articles and the ability to create Support cases.

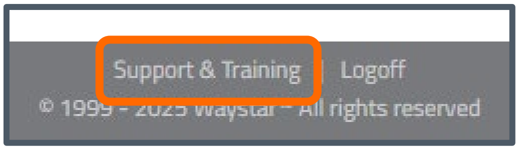
To hide the STC link:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. From the General tab, select the **Hide Support & Training link for user** checkbox.
4. Click the **Save General Settings** button.

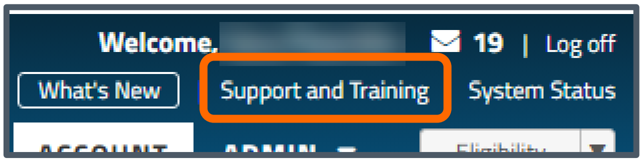


The selected user will no longer see the STC link in the Waystar portal, such as in the following locations:

- At the bottom of a portal screen:



- At the top of a portal screen:



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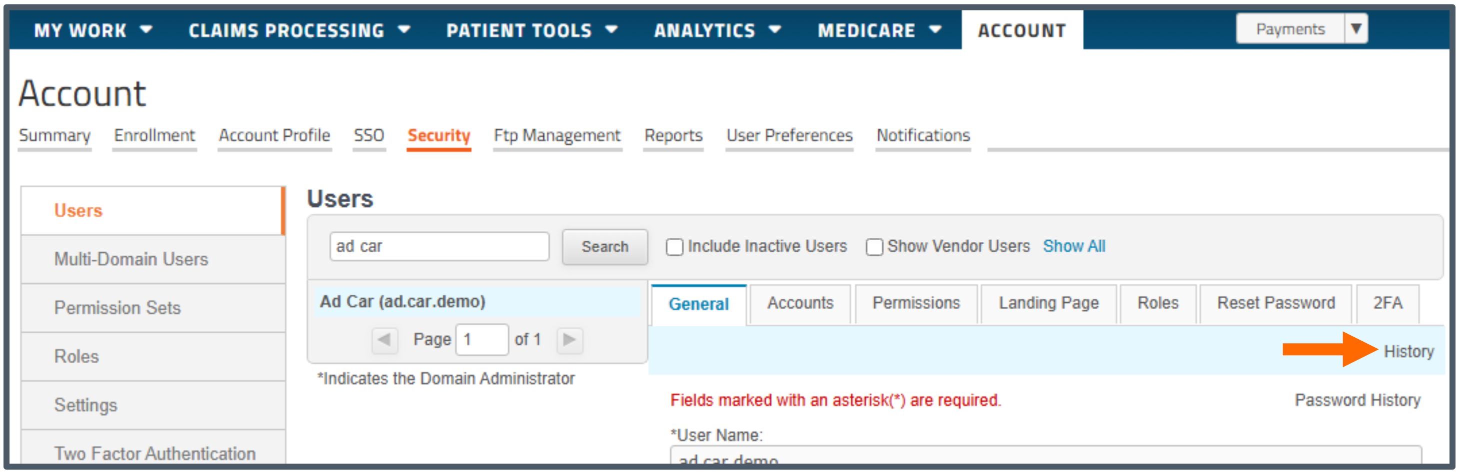
Viewing history

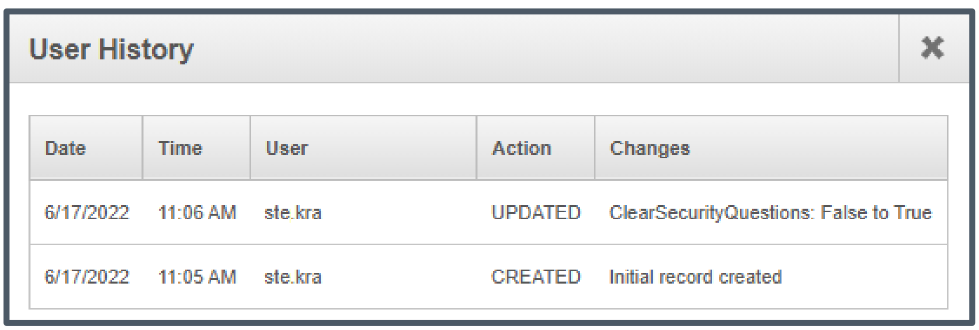
This section explains how to view the history of actions taken on the user via the General tab.

To view history:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. Click the **History** link on the right side of the blue bar at the top of the General tab.



The User History screen will open with a list of any actions taken on this user account.



- **Date**: The date the action was made.
- **Time**: The time of day the action was made.
- **User**: The user (DA or SM) who action the change.
- **Action**: The action status.
- **Changes**: A description of the action.

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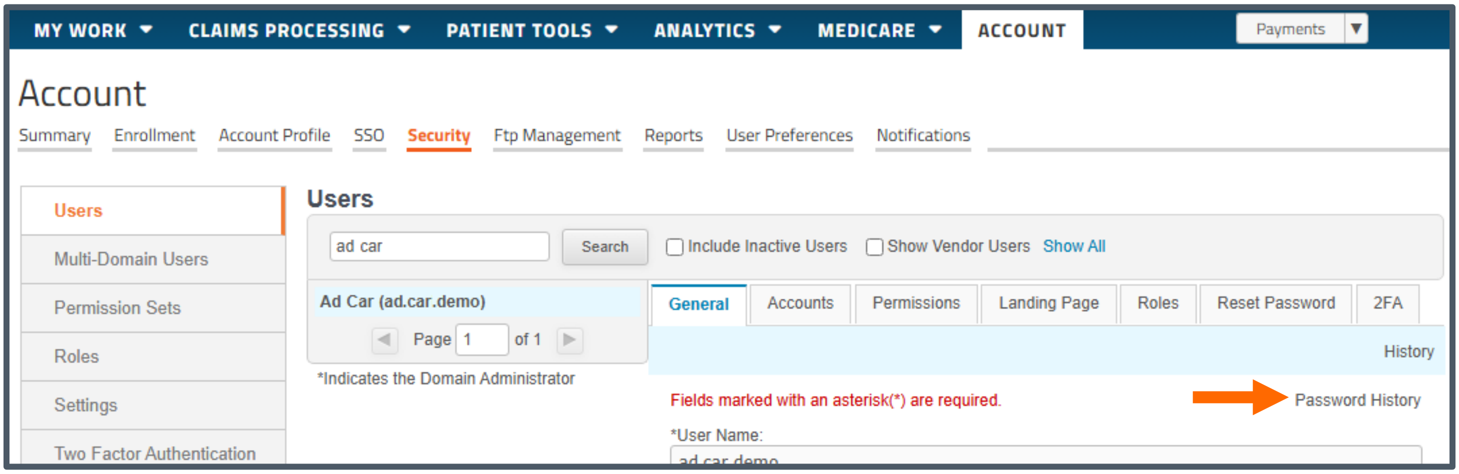
Viewing password history

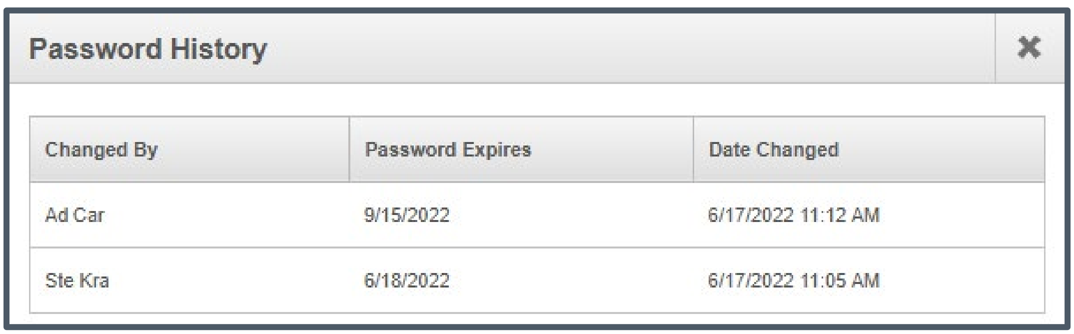
This section explains how to view the history of actions taken on the user via the General tab.

To view history:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. Click the **Password History** link near the top right of the General tab.



The Password History screen will open with a list of any actions taken on the password.



- **Change By**: The user (DA/SM or the user themselves) who changed the password.
- **Password Expires**: The date the user's password will expire.
- **Date Changed**: The date the password was changed.

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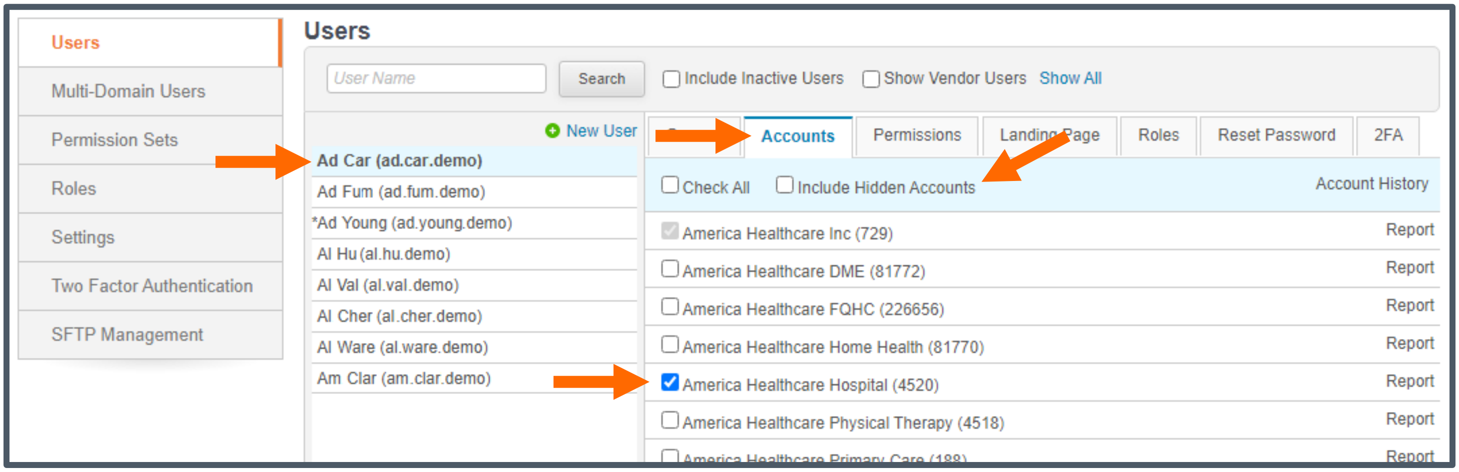
Using the Accounts tab

This section explains how Domain Administrators and Security Managers can grant user access to specific accounts within a domain.

To use the Accounts tab:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. To the right of the selected user, click the **Accounts** tab. All the child accounts for the domain are listed in alphabetic order after the Parent account.
4. *Optional*. To view hidden accounts, click the **Include Hidden Accounts** checkbox. To hide/unhide accounts, contact your Waystar Representative.
5. Complete one of the following:
   - Click individual checkboxes for each account to which the user will have access.
   - Click the **Check All** checkbox to select all accounts.
6. *Optional*. To view a list of users with access to a particular account, click the **Report** link to the right of an account name.



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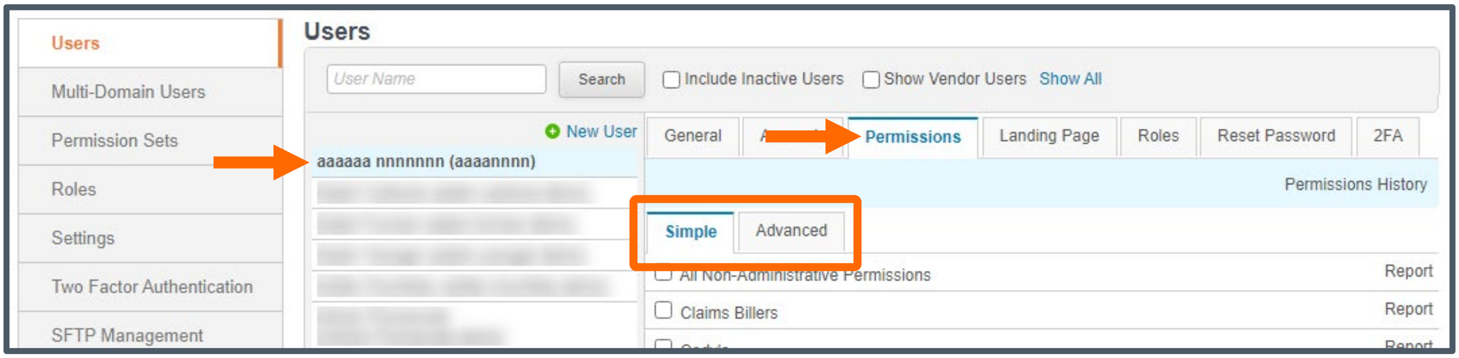
Using the Permissions tab

This section explains how Domain Administrators and Security Managers can assign or remove user permissions to solutions within the account(s) the user was granted access to.

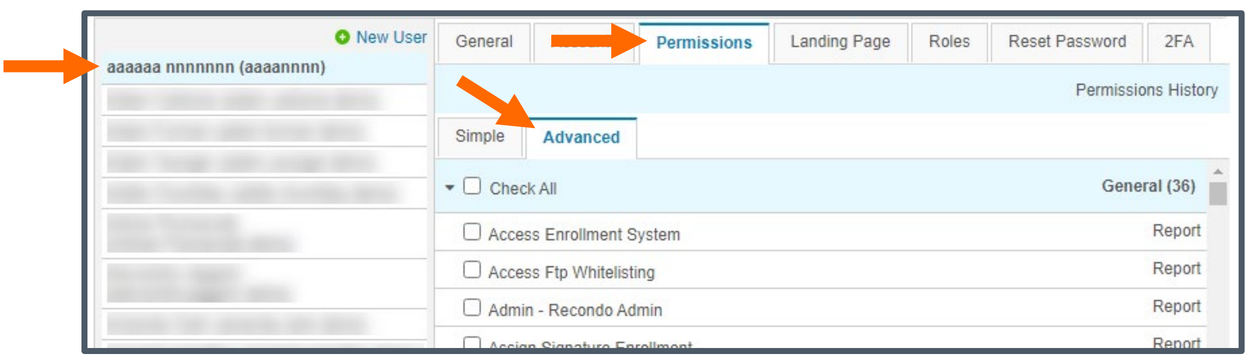
To use the Permissions tab:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. To the right of the selected user, click the **Permissions** tab.
4. To assign or remove permission sets, click the **Simple** subtab and select or clear the permission set checkbox(es). For more information, see the Working with Permission Sets section.

   When you select a permission set from the Simple tab, all checkboxes for the individual permissions included in the set are automatically checked (selected), grayed out, and cannot be changed on the Advanced tab.



5. To assign or remove individual permissions, click the **Advanced** subtab and perform any of the following:
   - To find the specific permission, either scroll the list or press **[ctrl]** **[f]** and use your browser's search function to locate a permission.
   - To assign or remove permissions, click individual checkbox(es).
   - To assign or remove all permissions for a solution, select or clear the **Check All** checkbox that appears in the blue heading bar for each solution.



6. *Optional*. To view a list of users granted permissions to a particular permission set or permission, go to the **Simple** or **Advanced** subtab, and click the **Report** link to the right of a permission.

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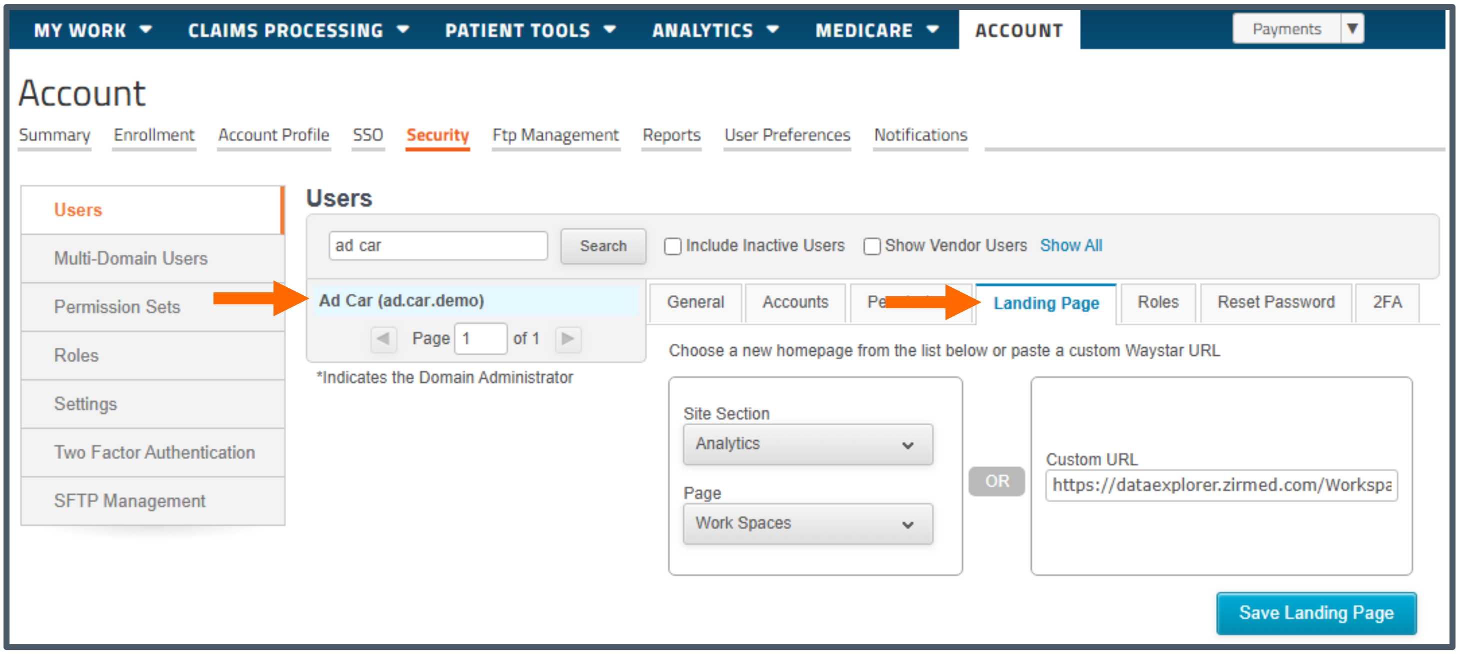
Using the Landing Page tab

This section explains how Domain Administrators and Security Managers can set a user's landing page when the user logs into the Waystar portal.

Note: The end user can set their default homepage by going to **ACCOUNT** > **User Preferences** > **Default Homepage**, as described in the "Customizing your User Preferences" article in the STC.

To set up a landing page:

1. To the right of the selected user, co to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. Click the **Landing Page** tab.



4. Complete either of the following:
   - **Site Section** and **Page** auto-select:
     – Using the **Site Section** dropdown, you have the option of setting the default Homepage to a number of high-level Waystar screens, including **Professional Claims**, **Work Centers**, and more.
     – If the screen you selected in the Site Section dropdown has more specific pages to choose from, select the desired screen from the **Page** dropdown. For example, select the **Analytics** Site Section and the **Work Spaces** Page.
   - **Custom URL**: If you do not see the screen in one of the above dropdowns, use your browser and copy any Waystar URL and paste it in the **Custom URL** field.

     Note: The URL you provide must be from a screen the user can access while logged into Waystar.
5. When finished, click the **Save Landing Page** button.

   The applied settings will appear the next time the user logs into Waystar.

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Using the Roles tab

This section explains how to set a user's role or how to create a new role. In the Waystar portal, roles allow you to define accounts and permissions that you can then assign to users, who will then inherit those settings. For example, you can set up a Front Desk role that has access to certain accounts and requires certain permissions that you can then assign to one or more users.

Creating a new role

This section explains how Domain Administrators and Security Managers can create a new role. Once you create the role you can then assign it to users who will automatically inherit the role's accounts and permissions.

To create a new role:

1. Go to **ACCOUNT** > **Security** > **Roles**.
2. Click the **New Role** link.

   A New Role entry area will open.
3. Enter the **Name** and **Description** of the new role.
4. Click the **Add Role** button.

   The new role will display in the role list of the **ACCOUNT** > **Security** > **Users** > **Roles** tab
5. After the role is created, you can add accounts, permissions, and users to the role.

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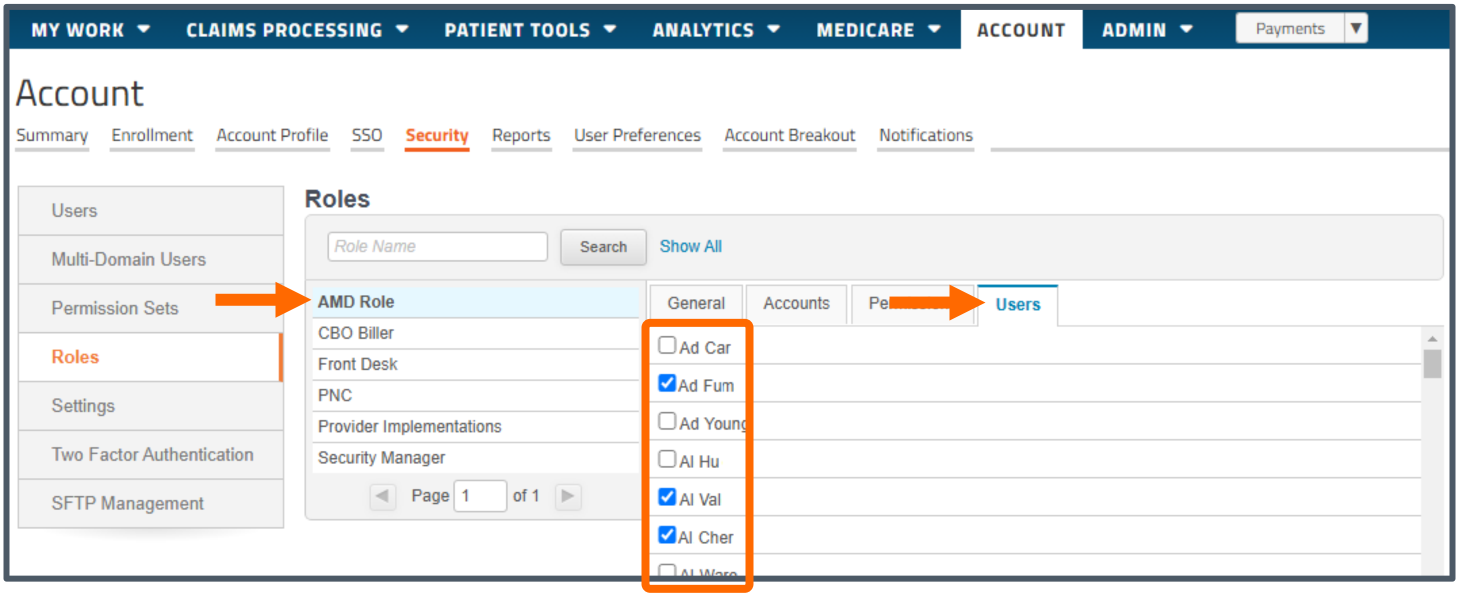
Assigning a role to multiple users

This section explains how Domain Administrators and Security Managers can set roles for multiple users. If a role does not exist, see the Creating a new role section.

To set roles for multiple users:

1. Go to **ACCOUNT** > **Security** > **Roles**.
2. From the list of roles on the left, select a role.
3. To the right of the selected role, click the **Users** tab.
4. Select one or more users.
5. Repeat as needed.



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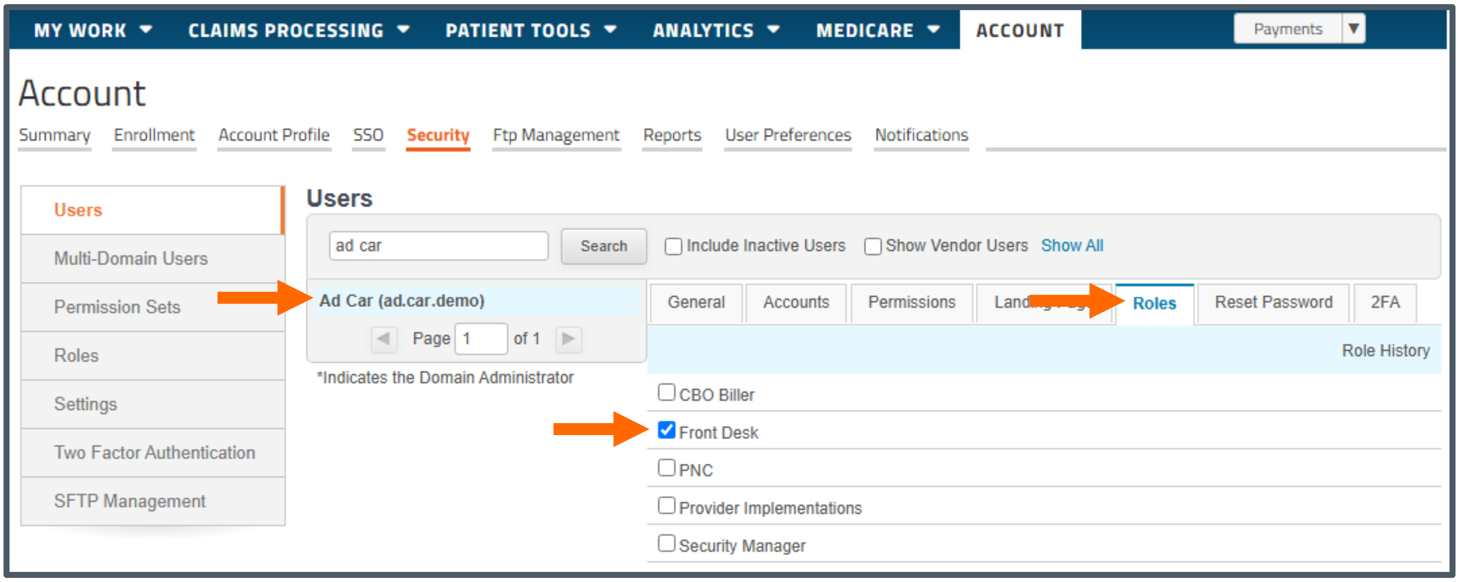
Assigning a role to individual users

This section explains how Domain Administrators and Security Managers can set an individual user's role, which can include setting up designated users as Security Managers. If a role does not exist, see the Creating a new role section.

To set a user's role:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. To the right of the selected user, click the **Roles** tab.
4. Select the checkbox to give the user the role.
5. Repeat as needed.



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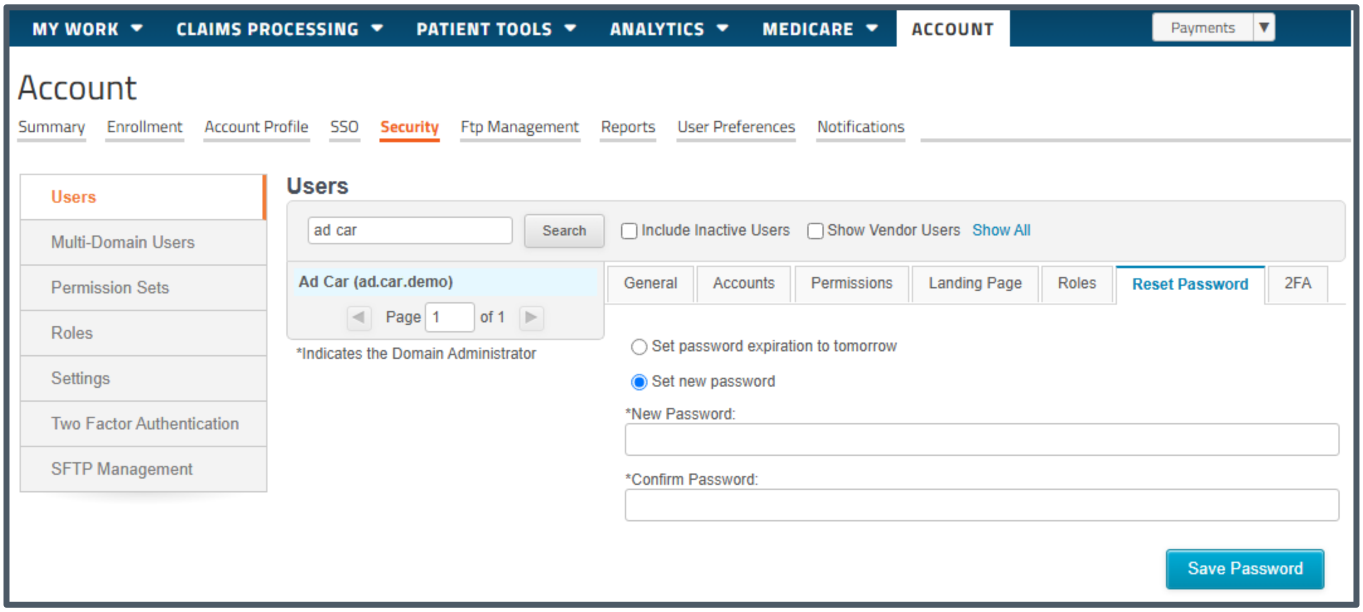
Using the Reset Password tab

This section explains how Domain Administrators and Security Managers can update/reset passwords for other users (but not for themselves). For end users to update their own passwords, they would go to the Waystar portal login screen and click the **Forgot your username or password?** link.

To reset a password:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. To the right of the selected user, click the **Reset Password** tab.



4. Complete one of the following as appropriate:
   - **Set password expiration to tomorrow**: Select this to force a user's password to expire the following day. The system will force the user to change their password when they log in.
   - **Set new password**: Select this to manually enter a **New Password** and **Confirm Password** for the user. A new password must adhere to the following parameters:
     - Contains at least 15 characters
     - Contains at least one number
     - Contains at least one uppercase AND one lowercase character
     - Contains at least one special character
     - Cannot contain any of the following special characters **< > * % & : \ ?**
     - Cannot contain the user's first name, last name, or Waystar username
     - Cannot have consecutively repeating characters
     - Cannot repeat previous 24 passwords
     - Cannot be a commonly used password.

     For additional information, see the Setting password options section.
5. Click the **Save Password** button.

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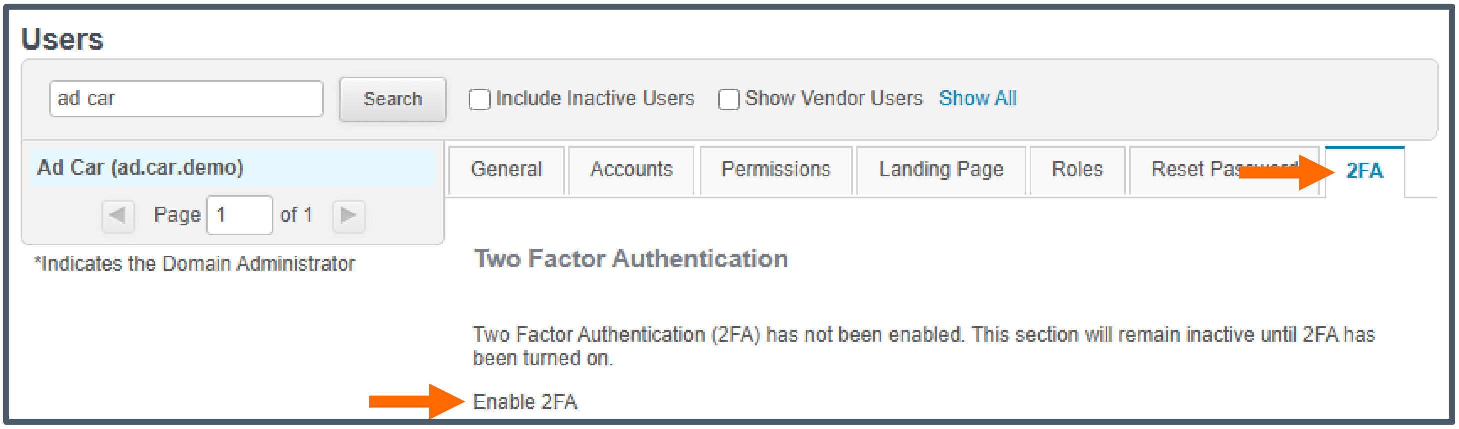
Using the 2FA tab

This section explains how Domain Administrators and Security Managers can use the 2FA (two-factor authentication) tab. When two-factor authentication is enabled for your organization (see the Enabling (requiring) two-factor authentication section), you can use this tab to send one-time codes to users who have lost access to their Waystar account.

To use the 2FA tab:

1. Go to **ACCOUNT** > **Security** > **Users**.
2. Select a user.
3. To the right of the selected user, click the **2FA** tab.
4. Do the following as appropriate:
   - If two-factor authentication is disabled for your organization, the tab will display a link that will take you to the Two Factor Authentication screen where you can enable it. See the Enabling (requiring) two-factor authentication section.



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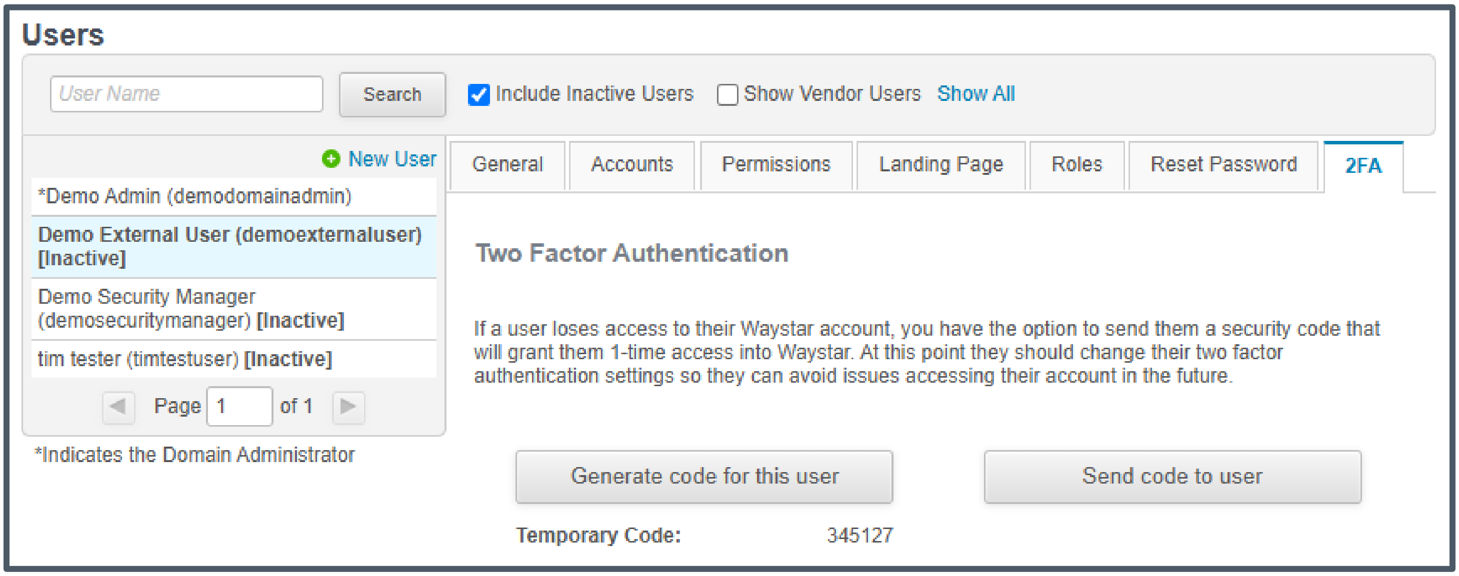
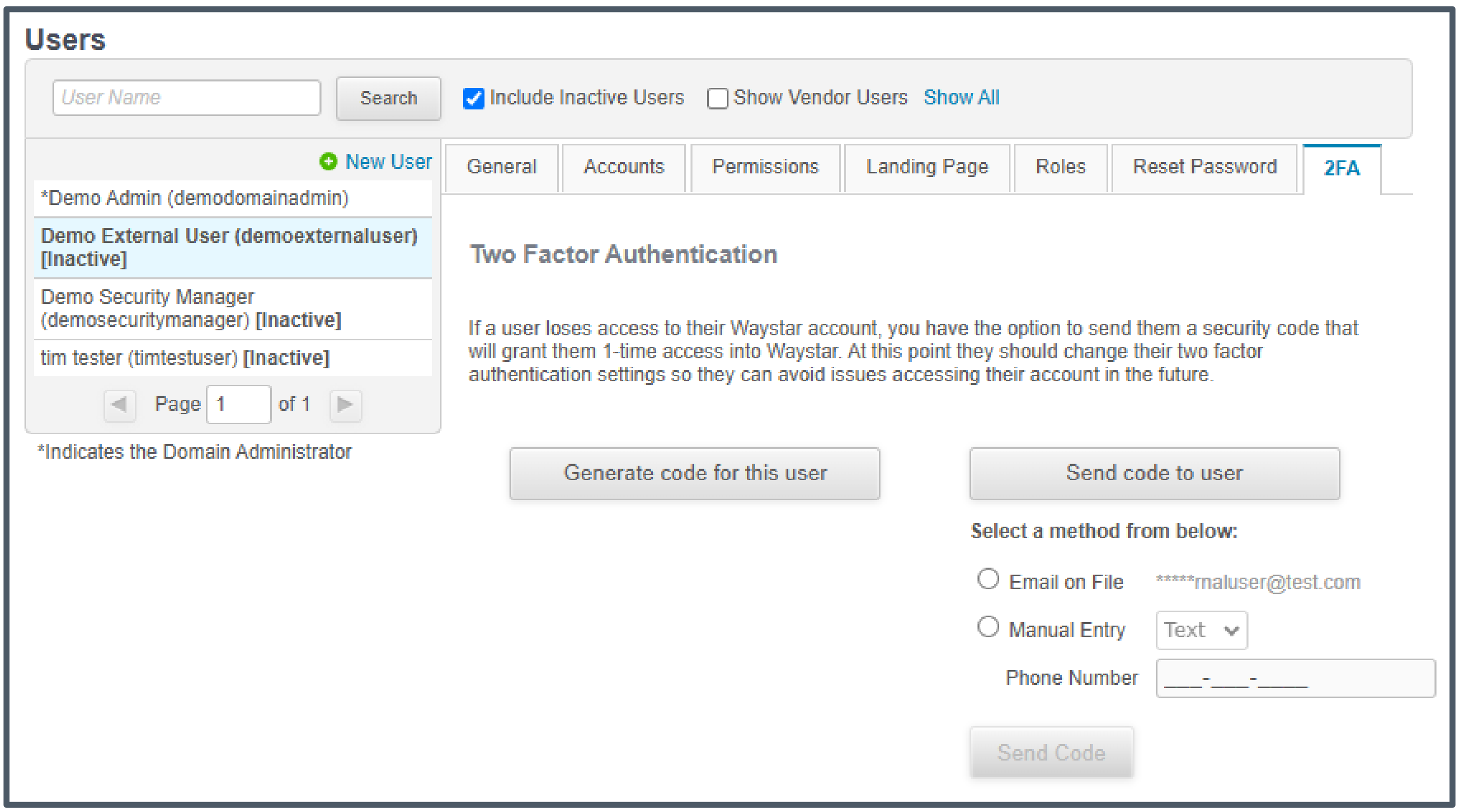
- If two-factor authentication is enabled and a user loses access to their Waystar account, you can do either of the following:
  - **Generate code for this user**: Will generate a code and display it on the screen.



  - **Send code to user**: Will email or text the code to the user, which you can select from the screen, so that they can receive the code and access the Waystar portal.



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Setting security

This section explains how a Domain Administrator can set up password and IP options.

Setting password options

This section explains how a Domain Administrator can set up allowed password rotation and auto-deactivation.

Note: Security Managers cannot update this screen.

To set password options:

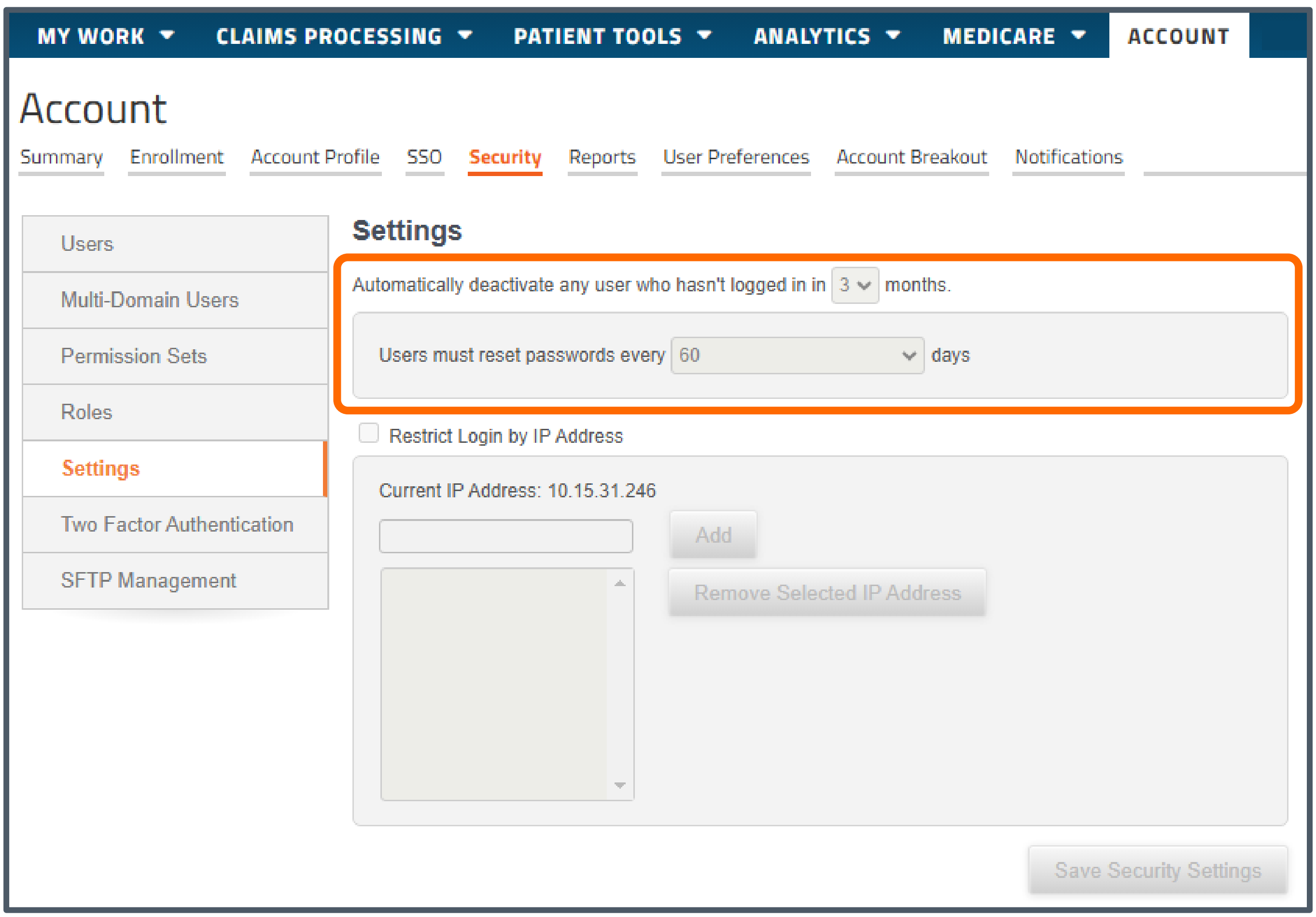
1. Go to **ACCOUNT** > **Security** > **Settings**.

   The Settings screen will open.

2. From the dropdown boxes, select:

   - **Auto-deactivation**: Set the **Automatically deactivate any user who hasn't logged in in *X* months** field using the dropdown. You can select from 1 to 3 months.
   - **Change frequency**: Set the **Users must reset passwords every *X* days** field using the dropdown. You can select from 30 to 60 days.

3. When finished, click the **Save Security Settings** button.



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Working with IP addresses

This section explains how a Domain Administrator can enable and restrict system access to the specified IP address(es) and how to remove an IP address restriction.

Note: Security Managers cannot update this screen.

Restricting login by IP address

This section explains how a Domain Administrator can restrict anyone logging into your system to one or more specific IP addresses, meaning the user must be using those specified IP address(es) to log into your system.

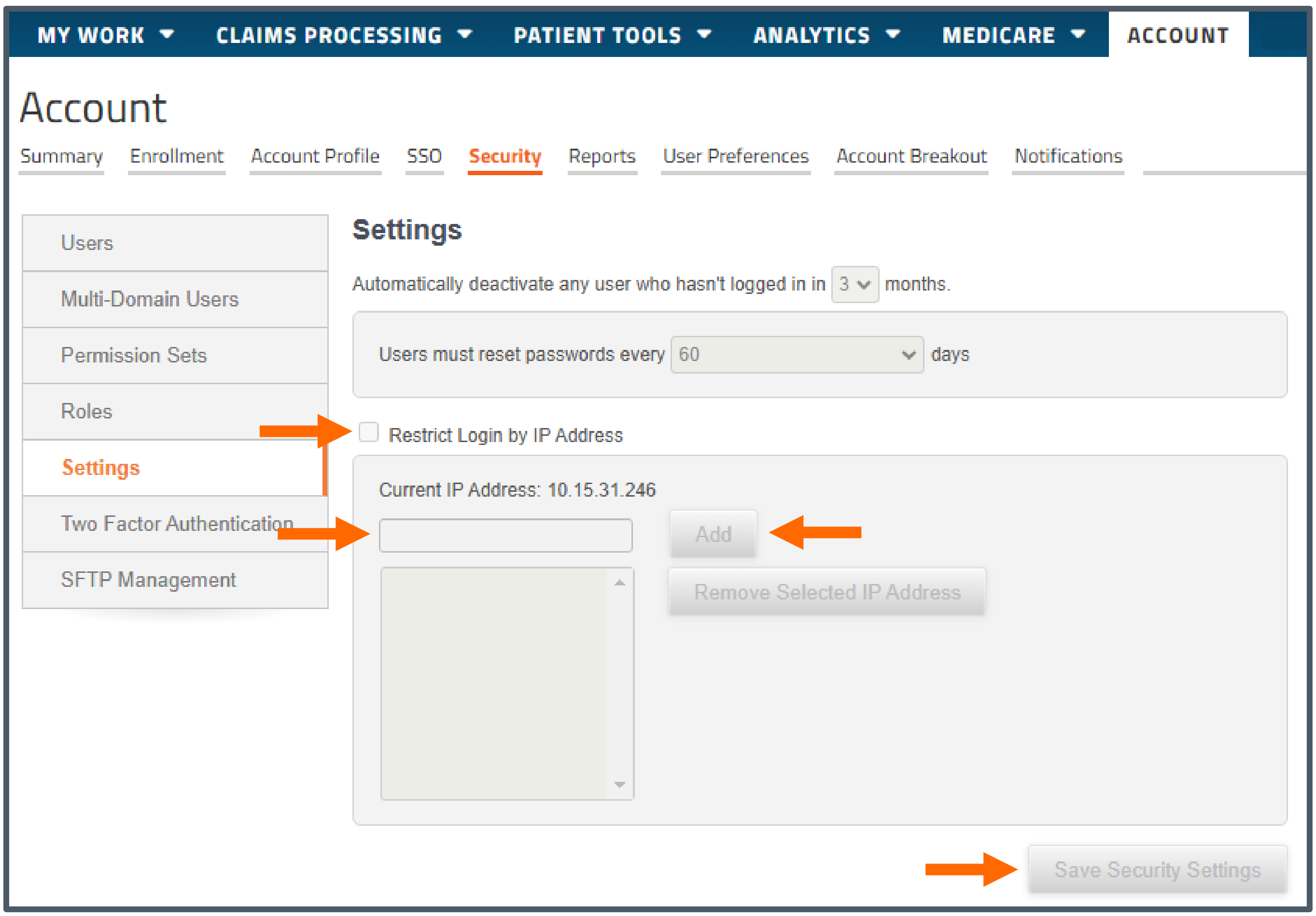
Note: Security Managers cannot update this screen.

To restrict login by IP address:

1. Go to **ACCOUNT** > **Security** > **Settings**.

   The Settings screen will open.
2. Select the **Restrict Login by IP Address** checkbox.
3. Enter the IP address from which a login is allowed.

   Note: To find a user's IP address, run the System Access Report.
4. Click the **Add** button.
5. When finished, click the **Save Security Settings** button.



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Removing an IP address restriction

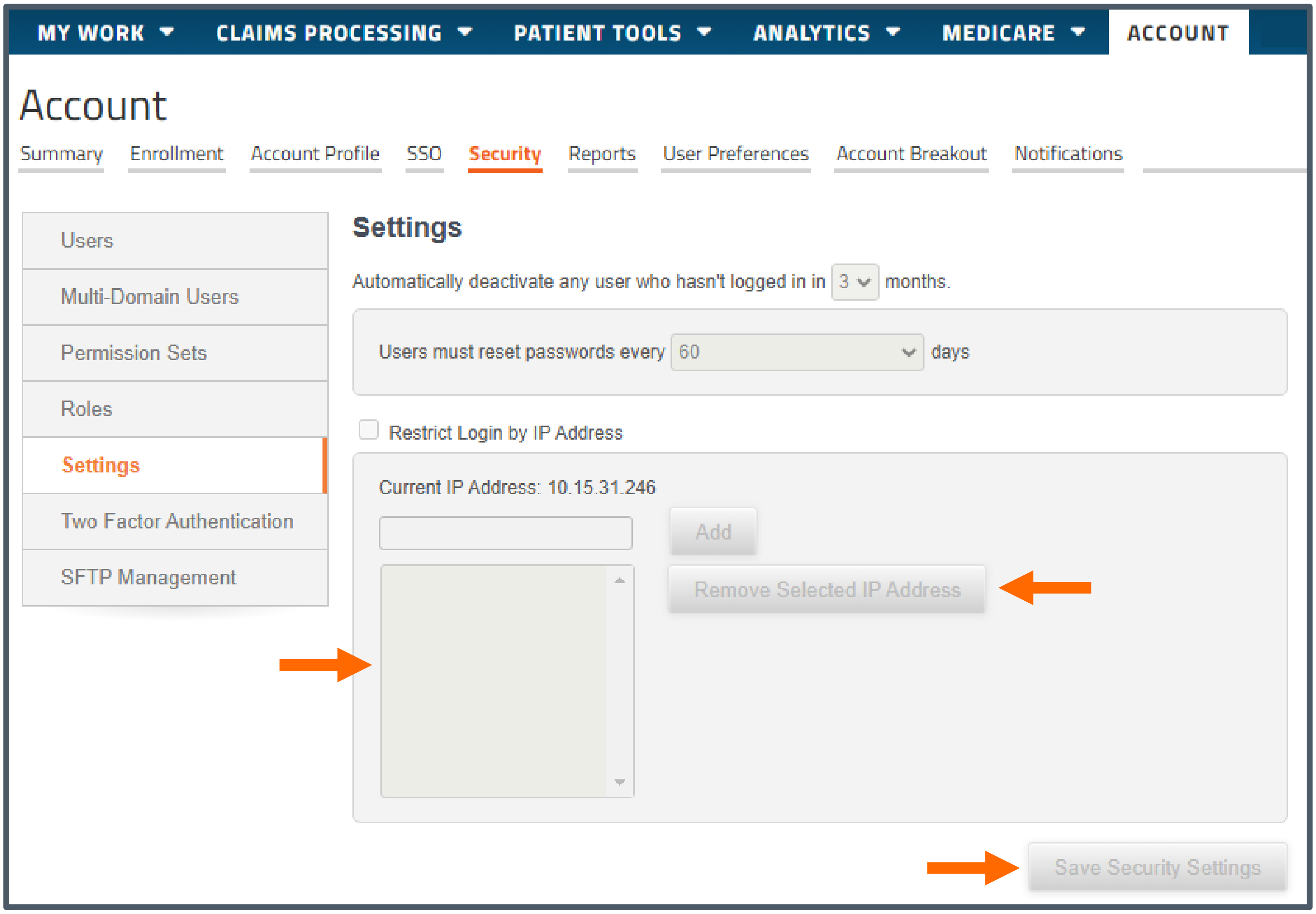
This section explains how a Domain Administrator can remove an IP address restriction.

Note: Security Managers cannot update this screen.

To remove an IP address restriction:

1. Go to **ACCOUNT** > **Security** > **Settings**.

   The Settings screen will open.
2. Select the **IP address** in the list of accepted addresses.
3. Click the **Remove Selected IP Address** button.
4. When finished, click the **Save Security Settings** button.



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Working with Permission Sets

Overview

Permission sets allow your organization to select and save a specific "set" of permissions that you want to grant to your users. Waystar provides the following permission sets:

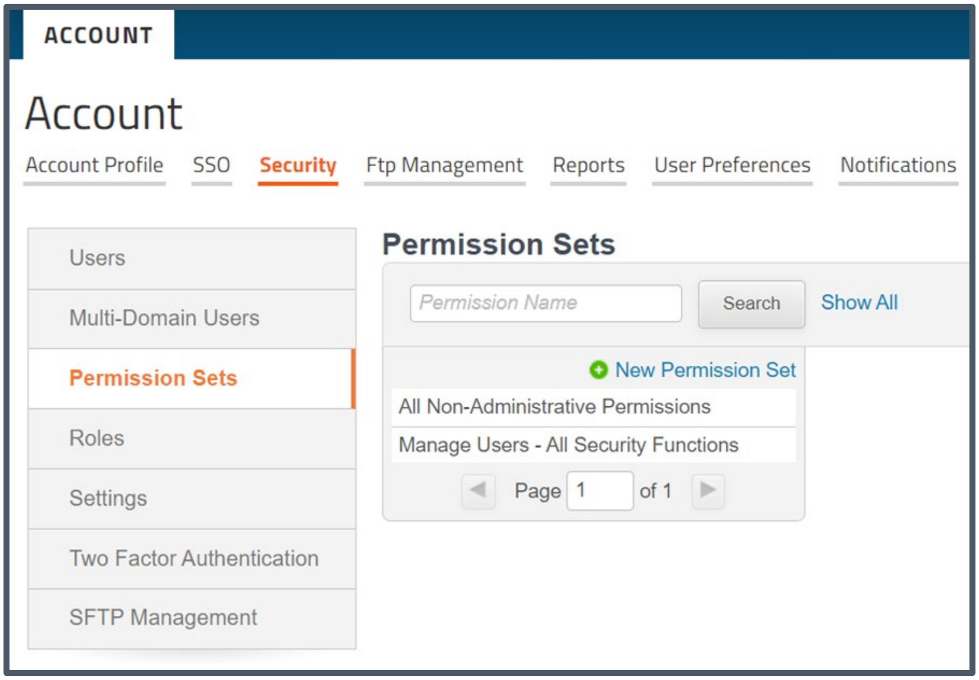
- **All Non-Administrative Permissions**: This permission set would give the user all permissions to every solution within the domain that fall outside those permissions for domain administrators and security managers.
- **Manage Users**: This permission set is for domain administrators and security managers, providing them access to all the screens necessary for them to manage their users.

Waystar recommends creating your own custom permission sets. This is because the All Non-Administrative Permissions set is most likely too broad for your non-admin users and you might have permissions outside of the Manage Users permission set that you want manager or admin users to have.

You can create as many permission sets as necessary, defining them as broadly or narrowly as you want. Once created, you would then use your custom sets to assign permissions to your users. For example:

- You might want a different permission set for your back-office users compared to your patient access users.
- You might want a permission set for each individual Waystar solution that you license, such as a permission set Patient Tools.

To view permission sets, go to **ACCOUNT** > **Security** > **Permission Sets**.



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Creating a custom permission set

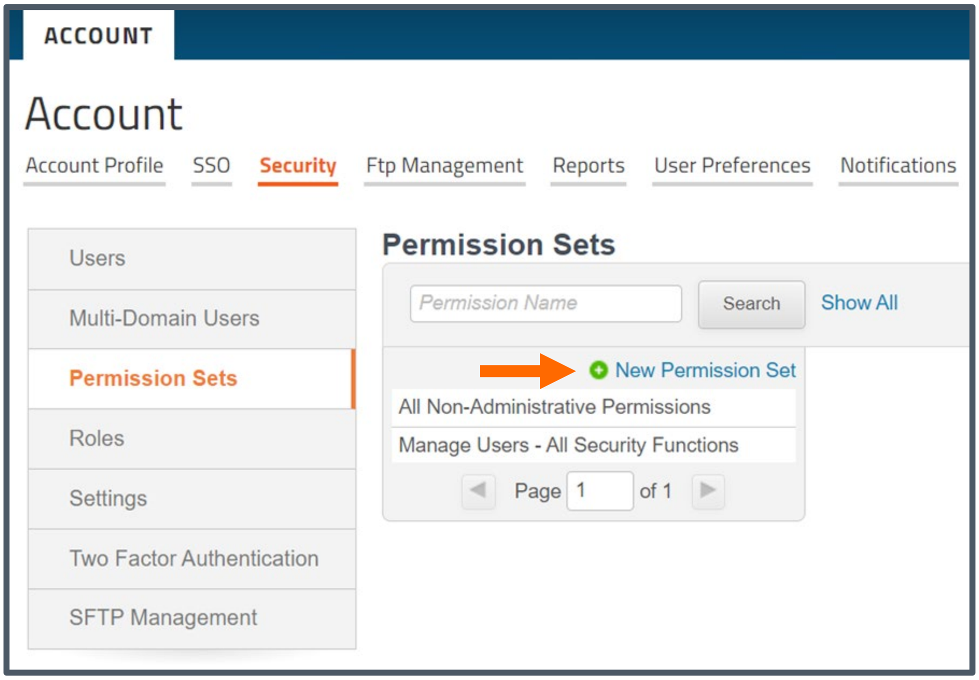
This section explains how Domain Administrators and Security Managers can create a custom permission set for your organization.

To create a custom permission set:

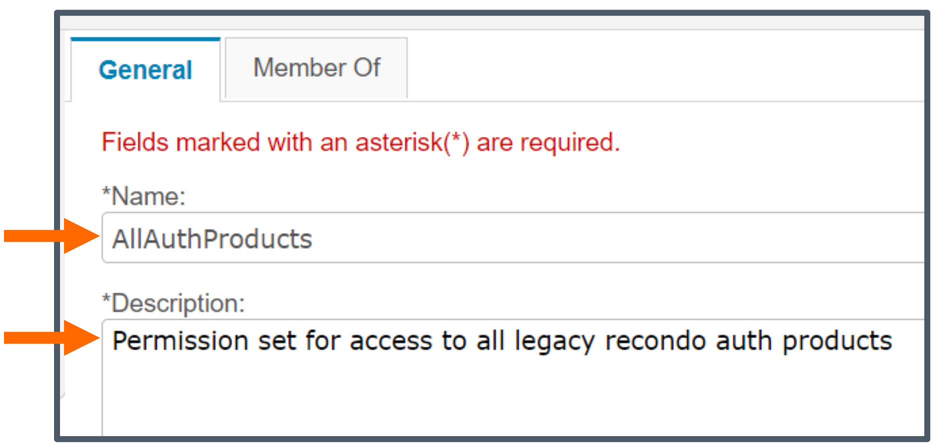
1. Go to **ACCOUNT** > **Security** > **Permission Sets**.

   The Permission Sets screen will open.

2. Click the **New Permission Set** link.



3. From the General tab that will open, enter the permission set **Name** and **Description**.



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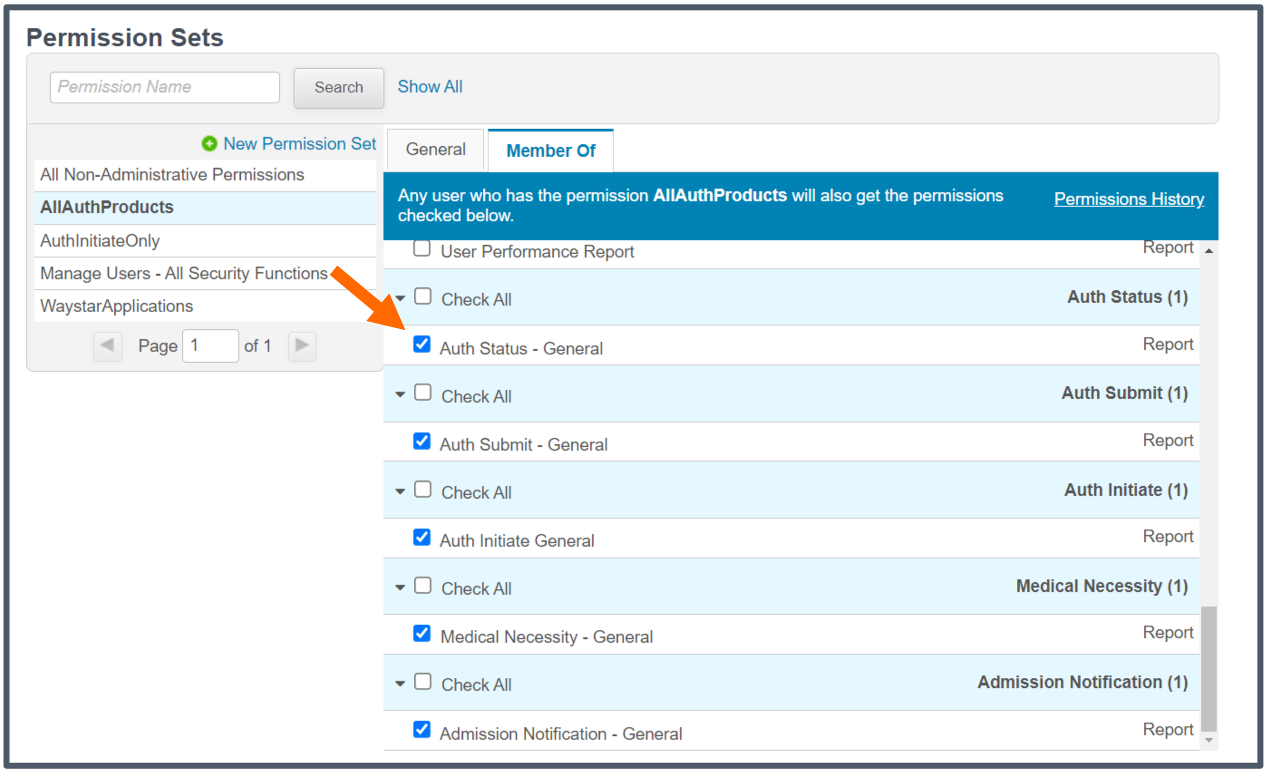
4. Click the checkbox to view the permission set in either the **simple view**, **advanced view**, or **both**.
5. Click the **Member Of** tab.
6. Select the checkboxes of all the permissions you want the new set to have.



7. To apply your changes, go back to the **General** tab and click the **Save** button.

Edit an existing permission set

This section explains how Domain Administrators and Security Managers can edit your organization's existing permission sets to add or remove permissions from the set.

IMPORTANT: If a permission set is edited or deleted, all users who have this permission set are affected.

To edit an existing permission set:

1. Go to **ACCOUNT** > **Security** > **Permission Sets**.

   The Permission Sets screen will open.
2. Locate the permission set name you want to edit. You can use the search field at the top of the screen.
3. From the list of permission set names, click the one you want to edit.
4. Click the **Member Of** tab.
5. Select or clear (unselect) the checkboxes of the appropriate permissions.
6. To save the changes, go back to the **General** tab and click the **Update Permissions Set** button.

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Enabling and using two-factor authentication

This section explains how a Domain Administrator can enable two-factor authentication, which lessens the risk of malicious attempts to access a user's account. When two-factor authentication is enabled, a user will be required to provide the following forms of identification when logging into the Waystar portal:

- Their username and password
- An authentication code that the user will be prompted to request and then receive from Waystar (as explained in this section).

Enabling (requiring) two-factor authentication

This section explains how a Domain Administrator can enable two-factor authentication.

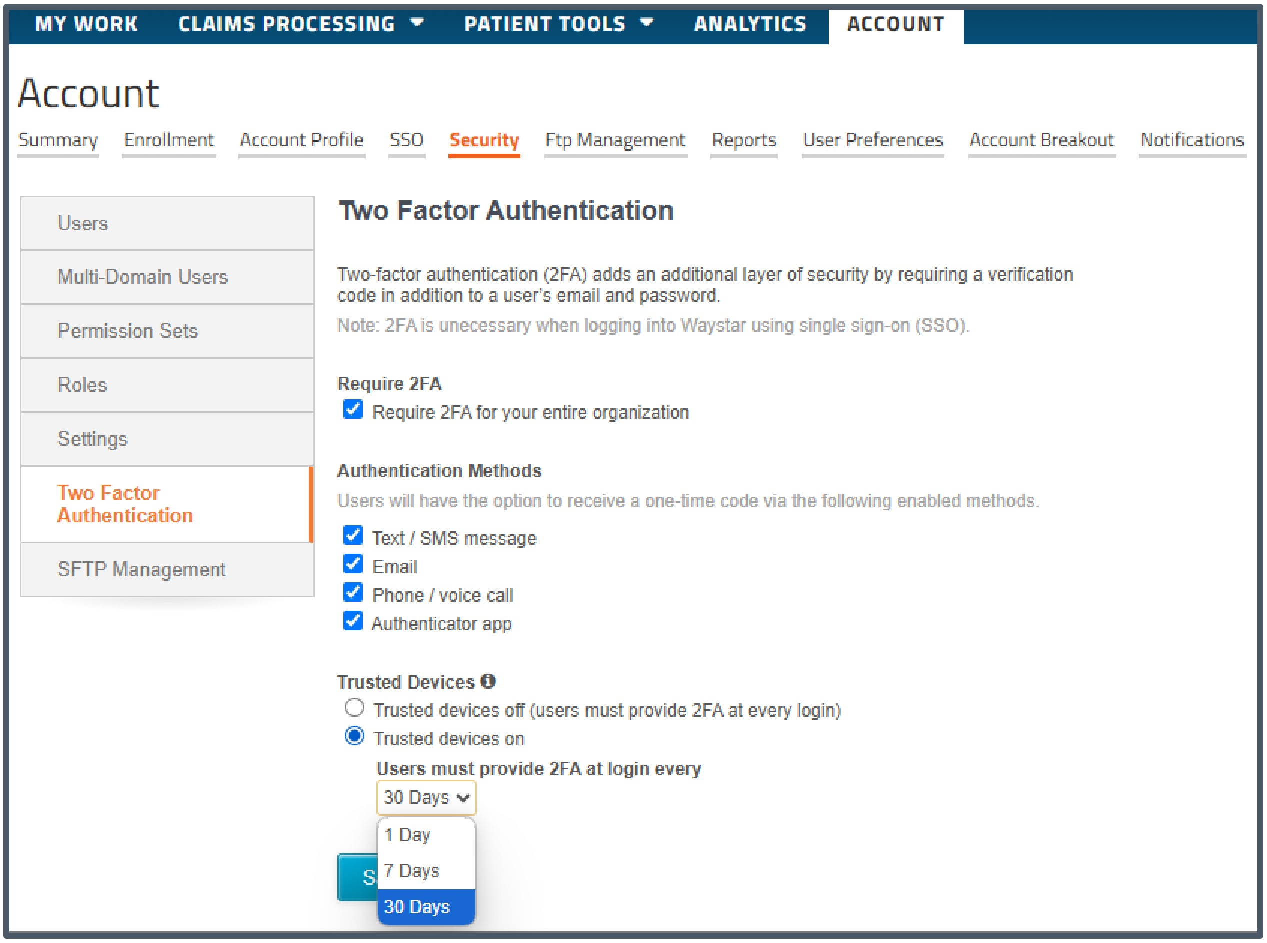
IMPORTANT:

- While it is optional for you to require two-factor authentication for your organization, if you enable this option, ***you cannot disable it***.
- Security Managers cannot update this screen.

To enable two-factor authentication for your organization:

1. Go to **ACCOUNT** > **Security** > **Two Factor Authentication**.

   The Two Factor Authentication screen will open.



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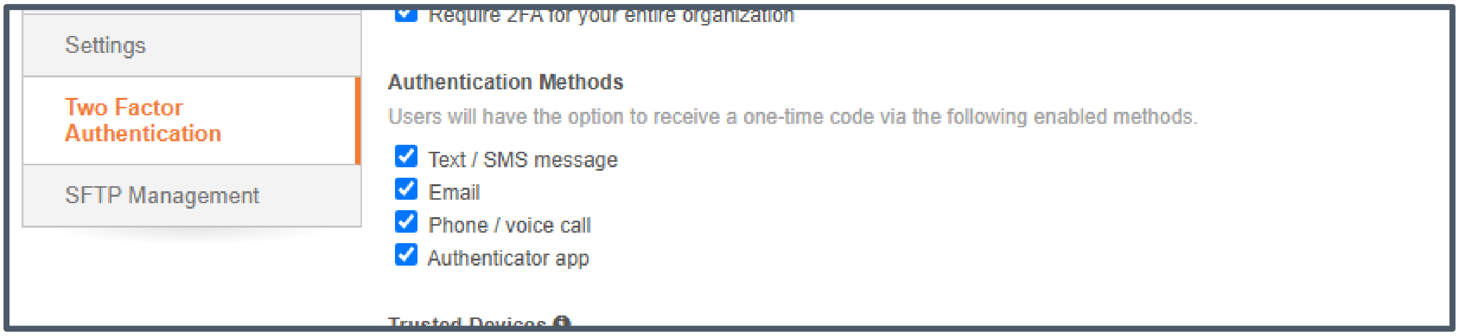
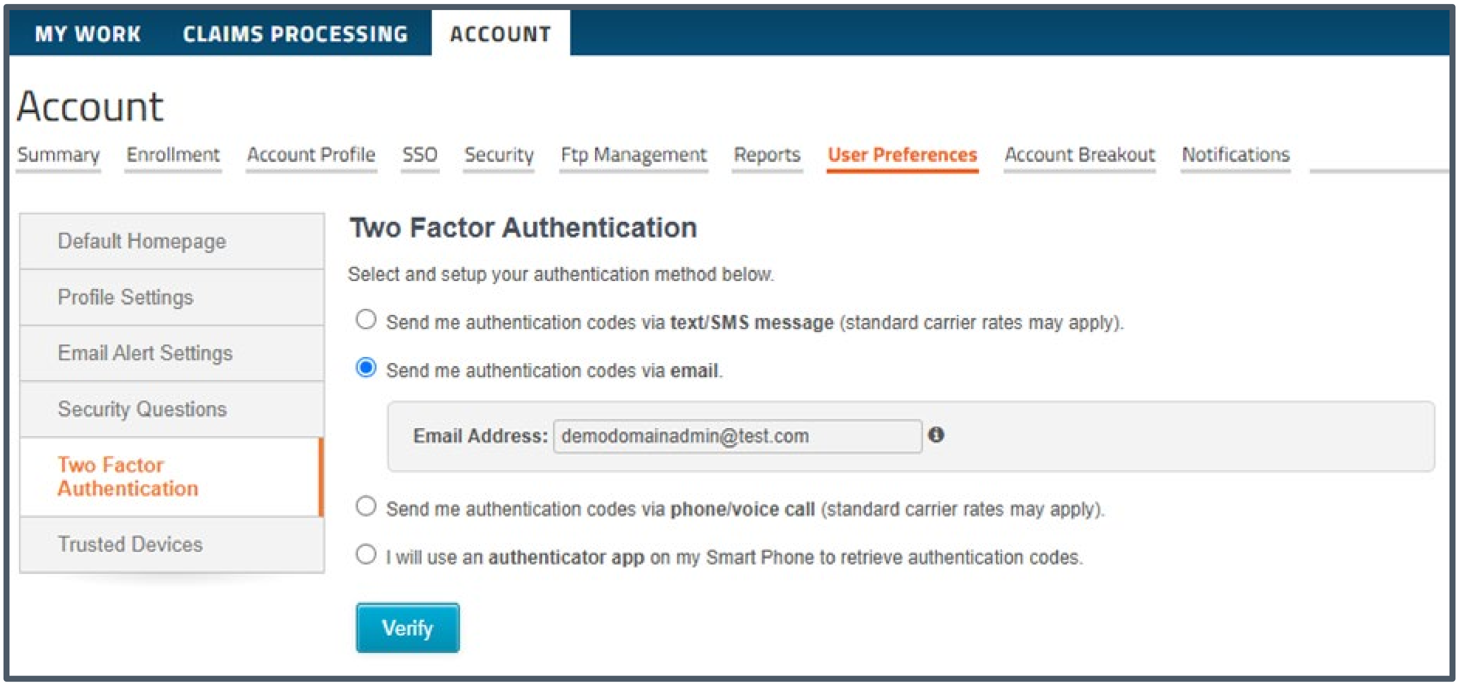
2. If you want to require two-factor authentication for your organization, select the **Require 2FA for your entire organization** checkbox. While requiring this for your organization is optional, if you do enable this option, ***you cannot disable it***.
3. To set the **Authentication Methods** that you want your users to have access to:
   a. Select one or more of the following methods:
      - Text/SMS message
      - Email
      - Phone/voice call
      - Authenticator app

      The selected methods will appear on the User Preferences > Two Factor Authentication screen as explained in the next step.



   b. The user needs to go to **ACCOUNT** > **User Preferences** > **Two Factor Authentication** to select one method they want to use.



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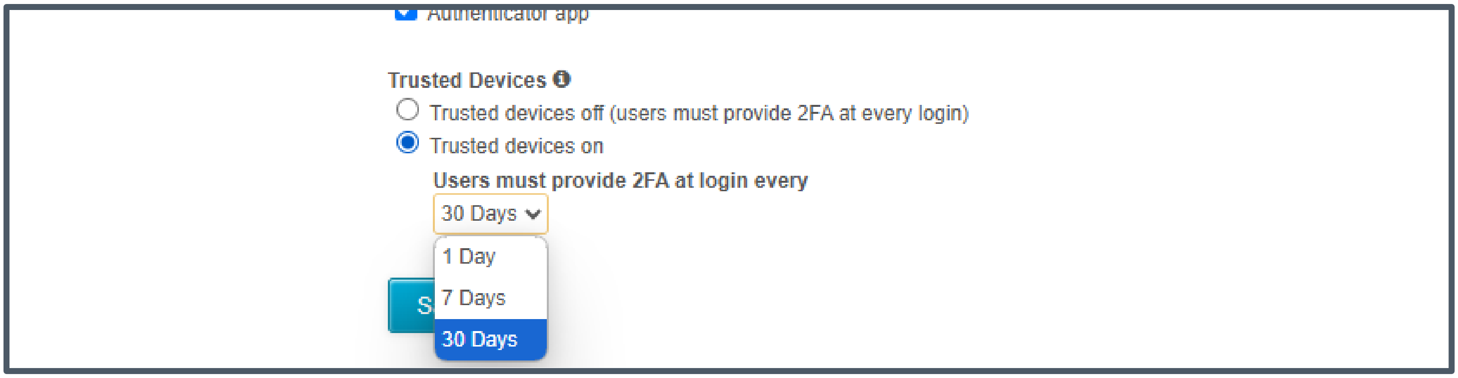
4. To set how you want your users to designate **Trusted Devices**, you have the following options:
   - **Trusted devices off**: Users must use two-factor authentication every time they log in.
   - **Trusted devices on**: From the dropdown, select how often a user must use two-factor authentication if they have designated a trusted device.



5. When finished making your two-factor authentication selections, click the **Save** button.

   When enabled, all users in your organization will have to use two-factor authentication when logging into the Waystar portal, as explained in the Using two-factor authentication section.

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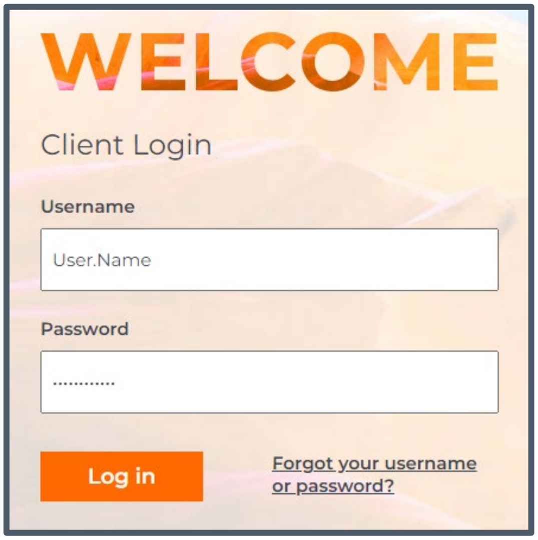
Using two-factor authentication

This section explains how an end-user interacts with two-factor authentication.

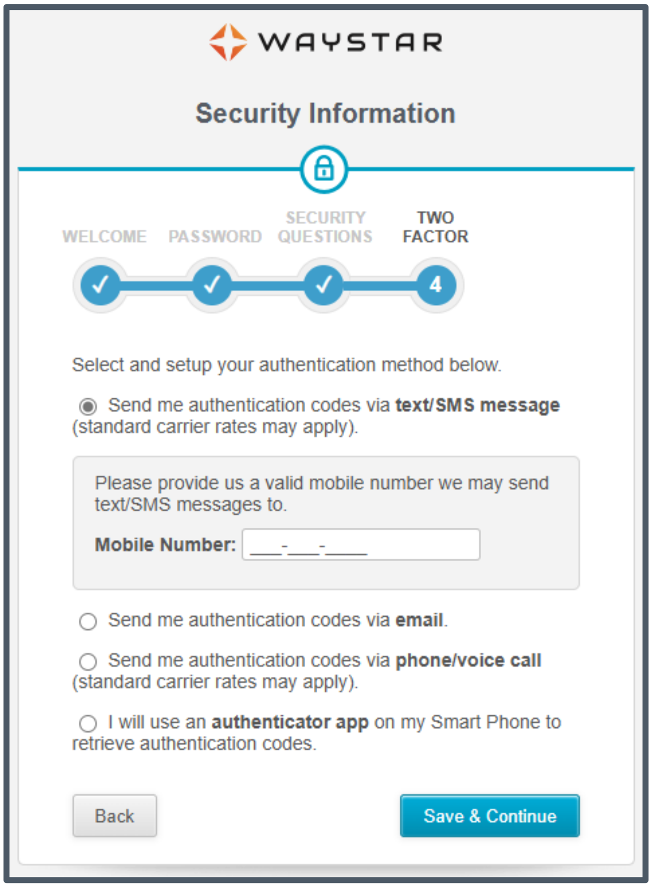
IMPORTANT: Your organization must enable two-factor authentication for it to appear for your users.

To use two-factor authentication:

1. On the Waystar portal's login screen, the user provides their username and password, and then clicks the **Log In** button.



   The initial Two Factor Authentication screen will open.



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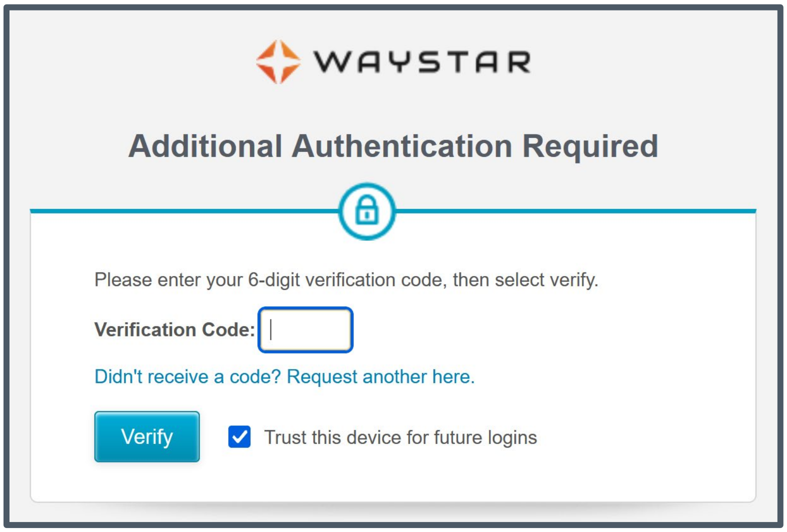
2. The user selects which method of authentication they want to use:
   - Text/SMS message
   - Email
   - Phone/Voice Call
   - Authenticator App

   Note: The user can also set this option from ACCOUNT > User Preferences > Two Factor Authentication.
3. The user then clicks the **VERIFY** button.

   The user will receive the authentication code and the subsequent Two Factor Authentication screen will open.

   Note: If the user did not receive the requested code, they can request another by clicking the link beneath the Verification Code field.



4. In the **Verification Code** field, the user enters the code provided to them by Waystar.
5. *Optional*. If the device they're using is secure, they can select the **Trust this device for future logins** checkbox, which will then bypass two-factor authentication.
6. The user clicks the **Verify** button.

   The Waystar portal will open to the user's default homepage.

   Note: The end user can set their default homepage by going to **ACCOUNT** > **User Preferences** > **Default Homepage**, as described in the "Customizing your User Preferences" article in the STC.

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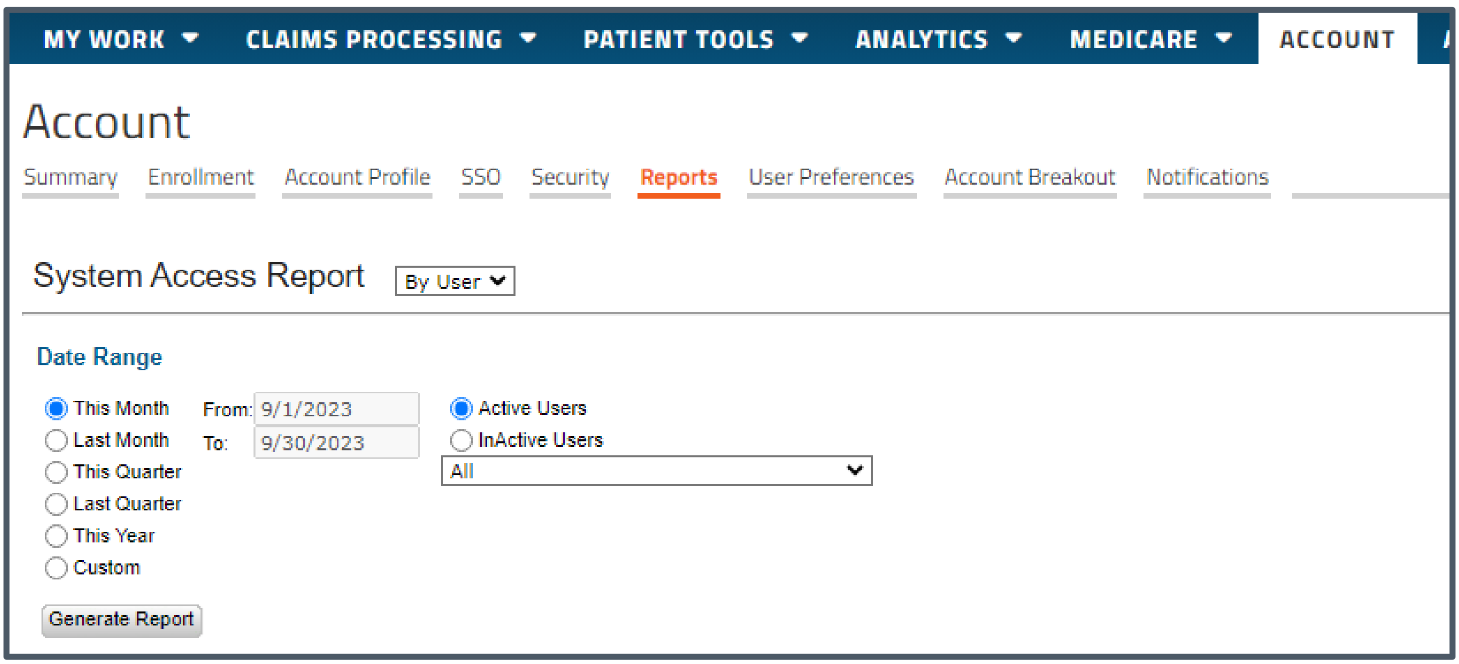
Using the System Access Report

This section explains how Domain Administrators and Security Managers can customize, view, and/or print the System Access Report. The report shows all active or inactive users who have accessed your domain within a specified date range.

To use the System Access Report:

1. Go to **ACCOUNT** > **Reports**.
2. Click the **System Access Report** link.

   The System Access Report screen will open.
3. Use any of the following filter options:
   - To sort the report by username or date, use the dropdown at the top of the screen to select **By User** or **By Date**.
   - To generate user information for the selected time period, select the appropriate date range in the **Date Range** area.
   - To show users in the following dropdown who can log into your domain or users who have been deactivated, select either the **Active Users** or **InActive Users** radio button.
   - To generate user information for a specific user, use the dropdown below the radio buttons to select the appropriate name (select **All** to see all active or inactive users).



4. After applying all desired filters, click the **Generate Report** button.

   If data is available for the selected filters, the report will display on the screen.

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Revision log

Date	Description	Version
June 2025	• Added the “Hiding the Support and Training Center link” section under the “Using the General tab” section • Updated the “Enabling (requiring) two-factor authentication” section	6
February 2025	Reviewed and updated the guide throughout	5

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