



ONCLOUD QUICK SETUP GUIDE

1. Login with the username and password provided by the OnCloud Administrator.
2. Click on the "Setup" tab in the **menu bar** on the left.
3. Click on "Program/Hospital Setup" and add your group's hospital(s) to the system.
4. Click on "User List and Setup" and add your **login users** to the system.
 - a. You will need to create a unique username and password for each login user.
 - b. Designate each OnCloud user as a "Group User" or "Group Admin." Admin users have access to the Setup and the Reports section. Group users can only enter procedures.
 - c. New users will default to "Active" status. Users can be deactivated in the future if they leave the group or no longer need access to OnCloud.
 - d. Each user can then be affiliated with one or more of your group's hospitals.
5. Click on "Personnel Setup."
 - a. Confirm that all your login users are already added to the window. OnCloud should automatically create a personnel record for all login users, as they need to be added to this section
 - b. Click on each login username and confirm that the "Associated Roles" and "Associated Programs/Hospitals" are correct. OnCloud designates all login users as a perfusionist by default. If any login users are not a perfusionist, you can update their role in this section.
 - c. The "Personnel Setup" section will then be used to add all your **non-login staff** to the system. At a minimum, you will want to add all of your surgeons. If there are multiple hospitals in your group, this is where you will specify the location(s) of each personnel.
 - i. To add non-login staff, begin by hitting the "Cancel" button, which will clear the name fields. Enter a first and last name, check the affiliated role(s) and hospital(s) boxes, and press "Save." Repeat these steps for each non-login staff member.
6. There are many additional parameters in the setup menu that can be modified. Proceed with caution before making any changes or consult with the OnCloud Support Team.
7. You are now ready to enter your first procedure. Click the OnCloud icon in the top left part of your screen, which will direct you to the **welcome screen**. Then click "New Case" to begin.