UpToDate
Subscriber Manager Console

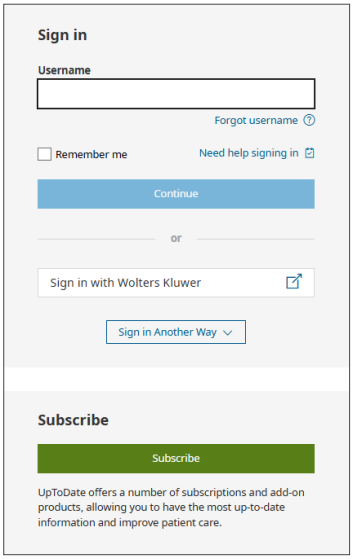
Instructions and best practices

Overview

The Subscriber Manager Console is an intuitive, web-based tool designed to enable you to easily manage access to UpToDate® for users from your organization. As the administrator, you will invite staff to register and create a username and password. Once registered, users can access UpToDate by logging in to www.uptodate.com/login from any computer or by using the UpToDate Mobile App.

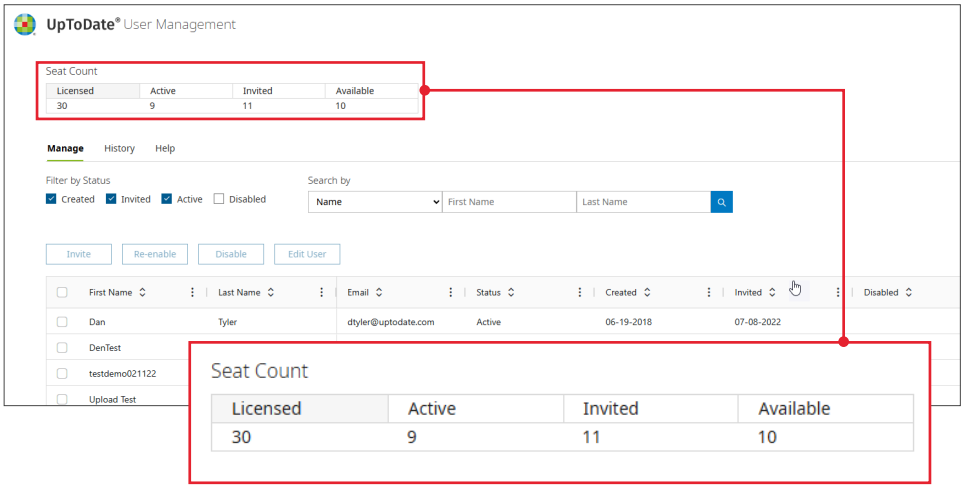
Step 1: Access the Subscriber Management Console

- You will receive an order confirmation via email following the signing of your contract.
- Visit usermanagement.uptodate.com/login.
- Log in with the credentials provided to you in the order confirmation email.
- Upon sign-in, you will automatically be redirected to the Subscriber Manager Console.



The number of UpToDate seats available in your organization was determined at the time your organization obtained its subscription and is reflected in your contract. The Subscriber Manager Console provides a display to keep you informed of seat utilization.

You can find and track the number of available seats in the upper left hand corner of the Subscriber Manager Console.



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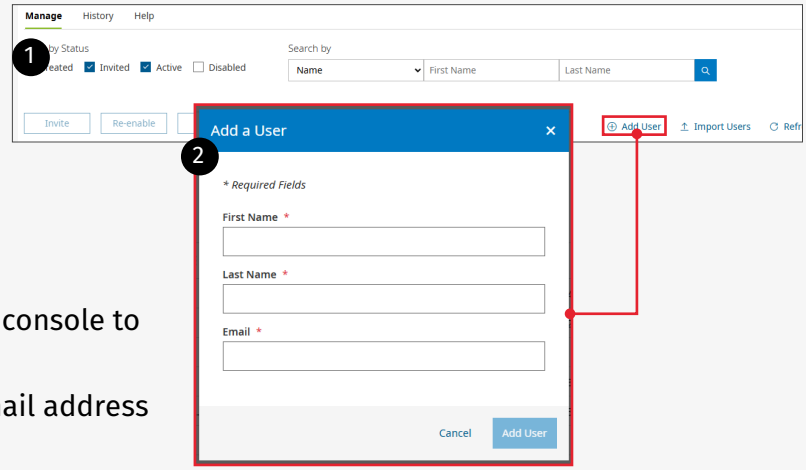
Step 2: Add users

Add invitees one at a time by clicking the “Add User” link or import a list of users by clicking the “Import Users” link.



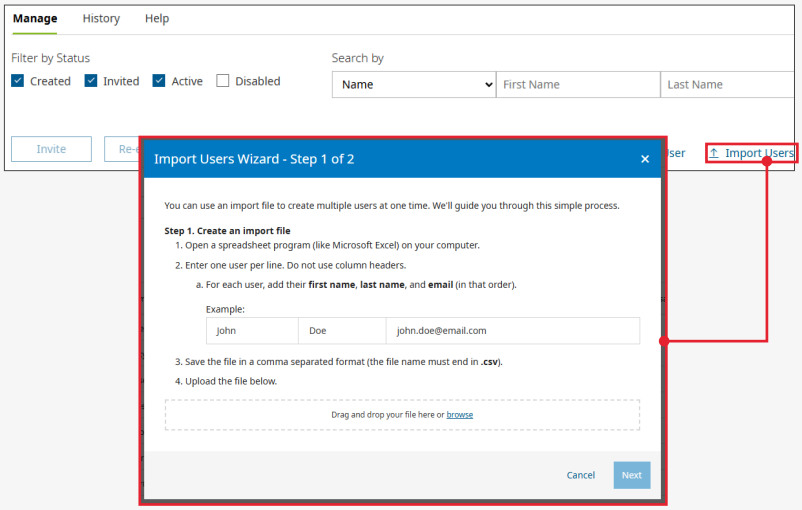
Add one user:

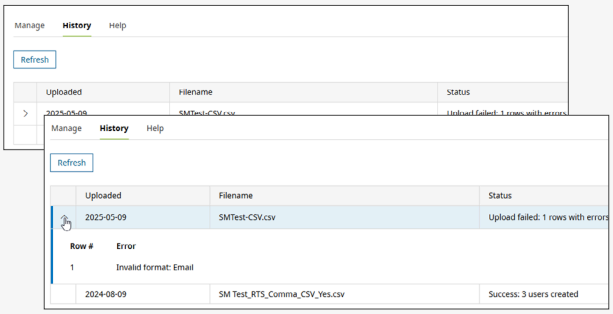
1. Click the link located on the right hand of the console to prompt the “Add a User” pop-up.
2. Enter the user’s first name, last name, and email address and select “Add User”.

The Subscriber Manager console will show a maximum number of 100 users per page, and pages can be navigated using the arrow buttons.

Import a list of users:

1. Click “Import Users” to launch an import wizard.
2. Follow the instructions in the wizard to set up and import a comma-delimited file.
3. **NOTE:** The file must include the user’s first name, last name, and email address.
4. Once the file is selected for upload, you can preview the first several rows of data to verify the fields are displaying correctly. After the file is uploaded, you will receive notification that the file has been submitted.



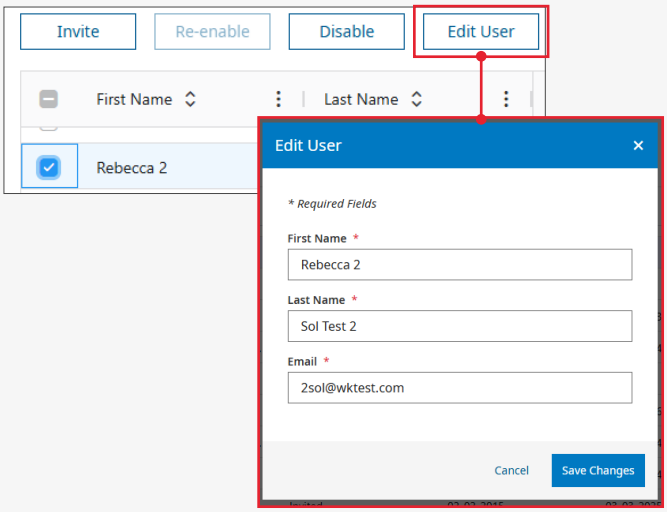


TIP: Once a file has been uploaded, check to ensure the file uploaded properly.

- Review any errors associated with the uploaded file on the “History” tab (each imported file is shown in chronological order).
- Click on the “>” symbol to expand the row and view the detailed errors that prevented data upload for that file.

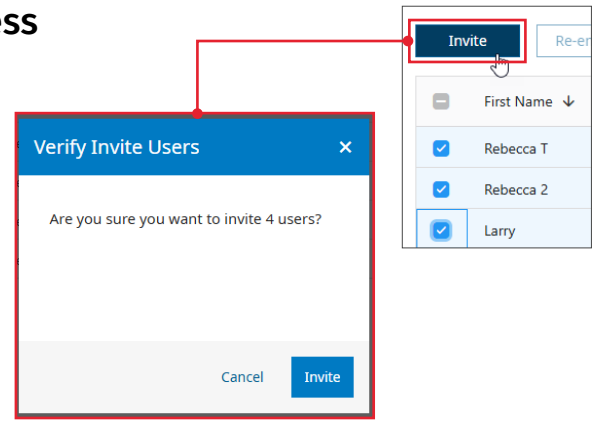
You can modify a user’s first name, last name, and email address after entry.

- Click the checkbox next to a user’s name and then the “Edit User” button.
- Only “Created” or “Invited” users can have their information modified. The “Edit User” button will be grayed out for those users who cannot have their information edited.



Step 3: Invite staff to register for UpToDate access

Once users have been added to the Subscriber Manager console, they will be in “Create” status.



To invite users to register for UpToDate access:

1. Click the checkbox next to each user you would like to invite.
2. Click the “Invite” button.

Important note: You will be able to invite as many staff members to register for UpToDate as contracted by your organization (i.e., # of licensed seats).

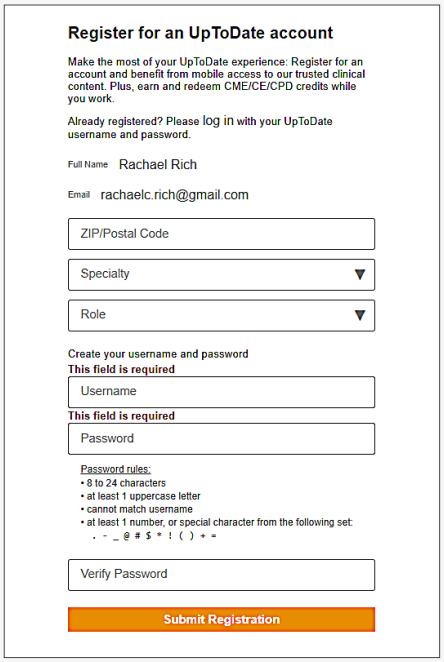
Each invited user will receive an email invitation to register and create their individual UpToDate username and password. You will see the user’s status change from “Created” to “Invited.” Each email will have a unique link for one-time registration specific to the recipient.

TIP: Once a user has registered their status will change to “Active”. Frequently re-invite the staff member to become a registered UpToDate user if their status does not change to “Active.” There is no limit on the number of invitations you can send each staff member. You can filter and search for users by utilizing the check boxes and search box.

Step 4: Invitees register for UpToDate

How it works:

- The email invite is specific to the end user and contains a link to a registration page that is valid for 30 days. Once consumed, it cannot be shared with others.
- The registration link brings the user into the application to self-register or to log in if the user has existing credentials.
- On the self-registration portion of the page, the user’s first name, last name, and email address are preloaded based upon the information the administrator had entered.
- Once a user completes the registration process or logs in with existing credentials, an automated email will be sent to the user confirming their registration and providing information on how to install the UpToDate Mobile App.

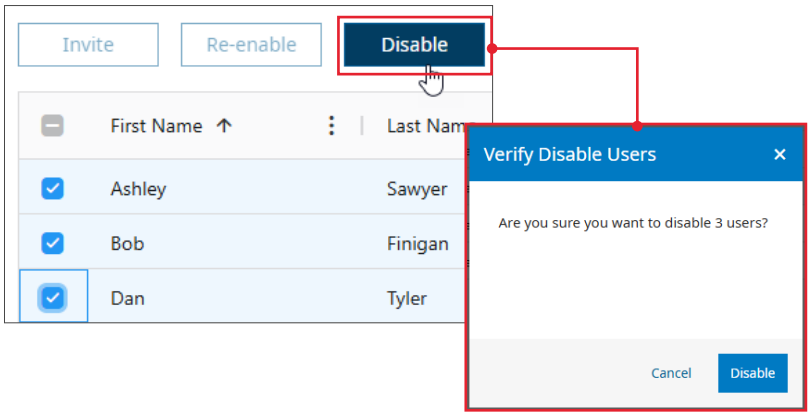


Step 5: Monitor seat usage and access

Should a user's affiliation with your organization cease, you can disable their access through the Subscriber Manager console and invite another user to utilize the seat that becomes available. It's important to disable the user's access in order to maximize utilization of your UpToDate licensed seats.

To disable a user:

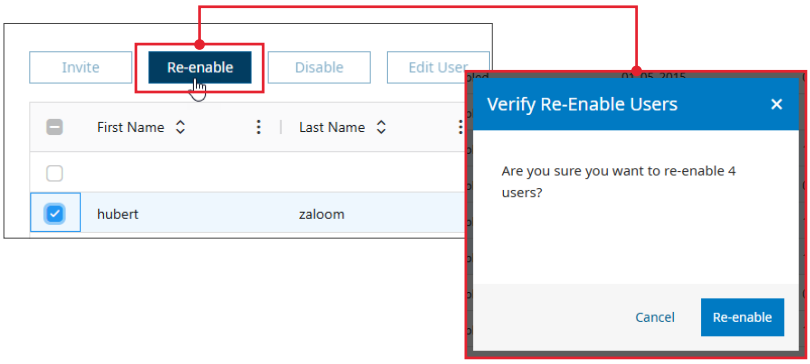
1. Select a user by checking the box by the user's name.
2. Click the "Disable" button.
3. Once users are disabled, the application sends the former user an email notification.



You can re-enable a returning user's account rather than create a new one.

To re-enable a user:

1. Select a user by checking the box by the user's name.
2. Click the "Re-enable" button.
3. Once re-enabled, the user will receive an email notification.

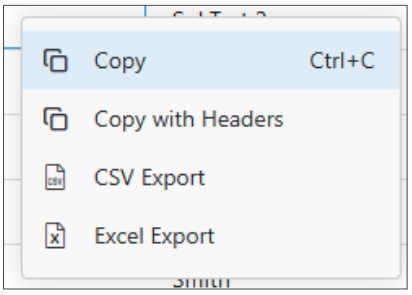


Export list

The list of users can be exported to either a CSV file or to an Excel file. Please note that the export will only include the users on the current page. It is recommended that you first filter your list by the status of the users that you wish to export.

Within the console, right click on any of the users and then select the type of file you'd like to export to.

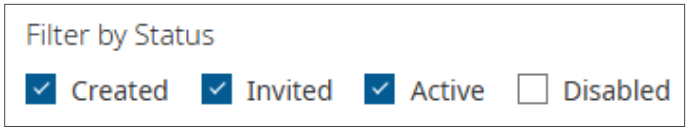
The file will be downloaded to your computer following your browsers download protocol



Additional functionality

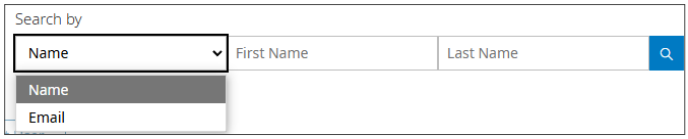
Filter by Status

Selecting any of these checkboxes will allow you to pull users with that status



Search by

Using the “search by” feature allows you to search for a user by name or by email. You can search by just the first name or just the last name or both.

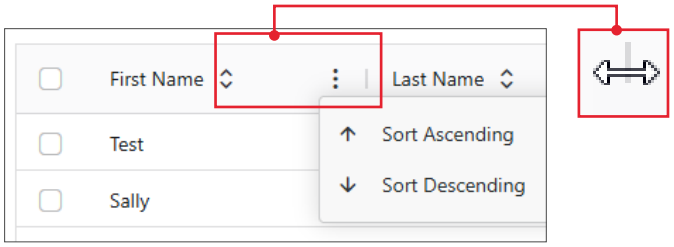


Additional sorting capability

The columns within the console can be sorted and the column width can also be adjusted.

To sort the data, you can click on the double arrows or on the 3 dots that can be found next to the column header.

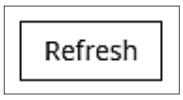
The column width can be adjusted by hovering on the solid line between each column and dragging it to the left or right.



Refresh

The Refresh Button within the console allows you to see the current information. Refresh is located on the right-hand side of the console where the add and import user buttons are located.

There is also a refresh button located in the history tab.



Customer Support

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