



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

Updating User Login procedure for HomeTrak V6.3

For Office Staff

Desktop, HTOnline and Mobile App

Why did HomeTrak change the log in procedure?

We changed the log in procedure for many reasons.

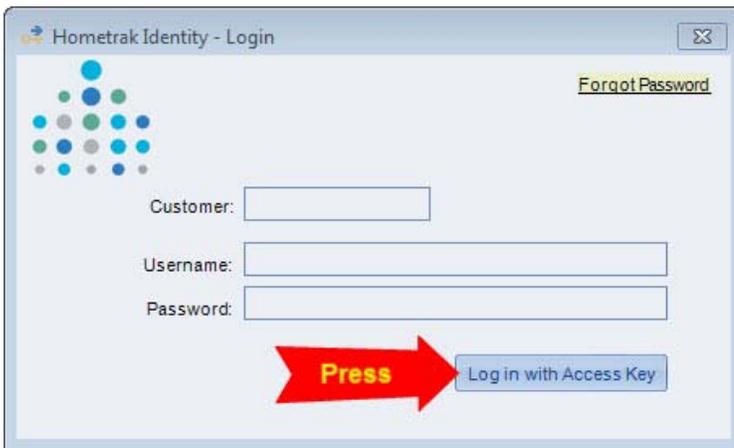
- We have eliminated the credentials that you would have to enter to change databases in the desktop version as well as the mobile app.
- The desktop version, mobile app as well as the HTOnline web portal all use the same user name and password.
- Users can now manage their own passwords without having to contact the office for a new password.

Steps to updating HomeTrak to the new login system.

The steps below assume that prior to installing version 6, it was confirmed that each office staff has a valid email address associated to them.

Step 1

The first time you log into HomeTrak, you will have to use the old log in procedure. In order to do so you must leave all the fields blank and click on the “Log in with Access Key” button.



Hometrak Identity - Login

Forgot Password

Customer:

Username:

Password:

Press



HomeTrak Login Screen

User Name:

Password:

Office:

Database: Language:

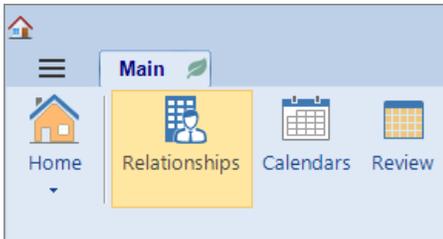
HTCloud

You will now log into HomeTrak as you normally would.

You will now email a new identity for yourself as well as each office staff entered into HomeTrak. (Step2)

Step 2

Press the *Relationships* icon in the main menu.



Step 3

Click on the *Office Staff* tab at the top of the window.

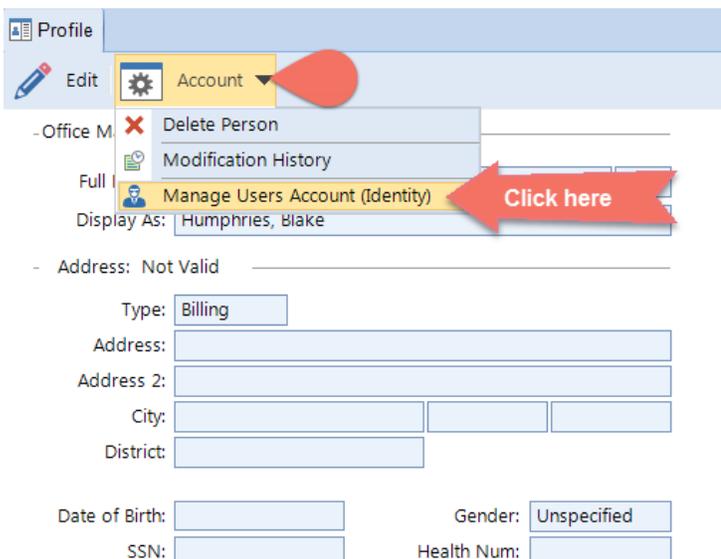


Step 4

Choose the office staff person you want to send the identity email to by choosing the person in the Result panel on the left-hand side.

Step 5

From the "Profile" tab, click on the **Account** drop down menu and choose the "Manage Users Account (Identity)" option.



Step 6

You will now create an identity account. Confirm that the “User Name” and “Email” fields have the correct email address for the office staff. The user name **must** be the email address!

The screenshot shows a 'Manage Identity Account' window. The 'User' field is 'Wright, Sue'. The 'User name' and 'Email' fields both contain 's.wright@hometrak.com'. A yellow callout box with red arrows pointing to these fields says 'Both the **User name** and **Email** fields must be the same.' A red arrow points to the 'Create and Email Identity Account' button with the text 'Click here'.

Click the “**Create and Email Identity Account**” button.

You will be prompted “**Are you Sure?**”. When you press Yes the account will be created and the new identity email will be sent to the office staff person.

The system may ask if you want to migrate the existing users account. Choose “yes”

Repeat step 4 – 6 for each active office staff person.

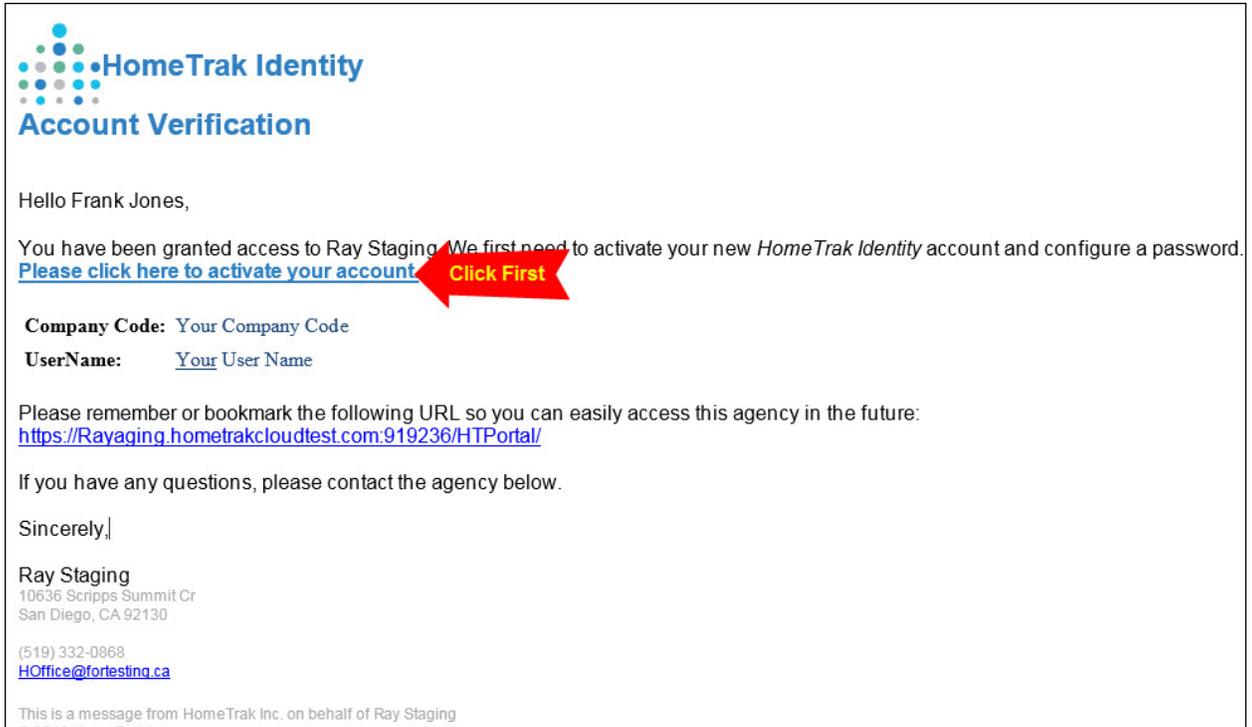
Congratulations! You have successfully setup new identity accounts for each office staff person within HomeTrak Companion.

Each user will receive an email with the procedure for activating their account. Follow the steps below for activating an account.

Activating New Identity Account HomeTrak Version 6.3

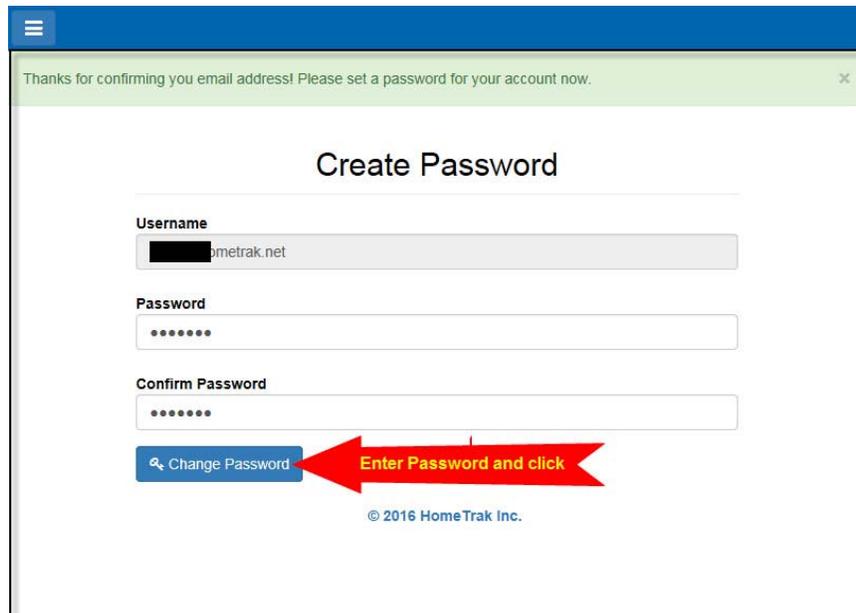
Step 1

An email will now be sent to the specified email address. Open the email and click on the “Please click here to activate your account” link.



Step 2

You must now enter in and confirm your password and click “Change password”



Step 3

You will now be directed to the HTOOnline portal login screen. It is important to log into the portal as you will be prompted to enter in security questions which will be required if you forget your password. Enter in your newly created password and click on “Log in” button.

Step 4

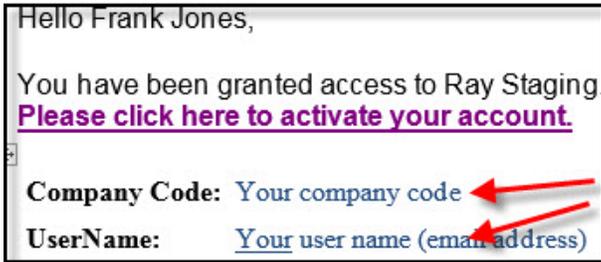
You must now enter in all the security questions and press save. These security questions will be used if you every need to reset your password.

Close the web browser.

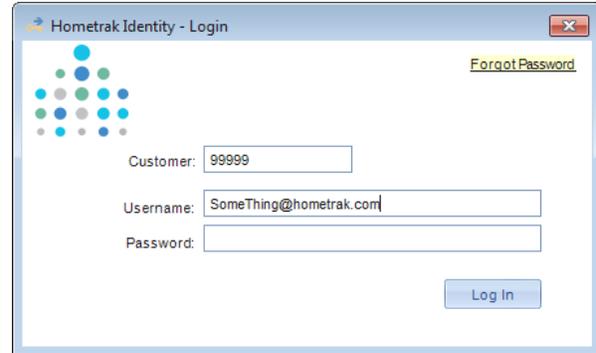
Step 5

You have now been updated with the new login identity. If you have not already done so, close down the HomeTrak program and log back in. You will now log into HomeTrak using the new identity. For the first time, the log in screen will have 3 blank fields. The "Customer" field is found in the email that was sent to you labeled "Company Code". The user name is the email address, and your password is the password you have created (once you have logged in the customer and username fields will be saved the next time). Press the "Log In" button to log into HomeTrak.

Section of email sent to each user



Example of new login screen



Congratulations! You have successfully completed the new log in procedure for HomeTrak Version 6.