LOGGGING INTO & SWITCHING SITE ACCOUNTS
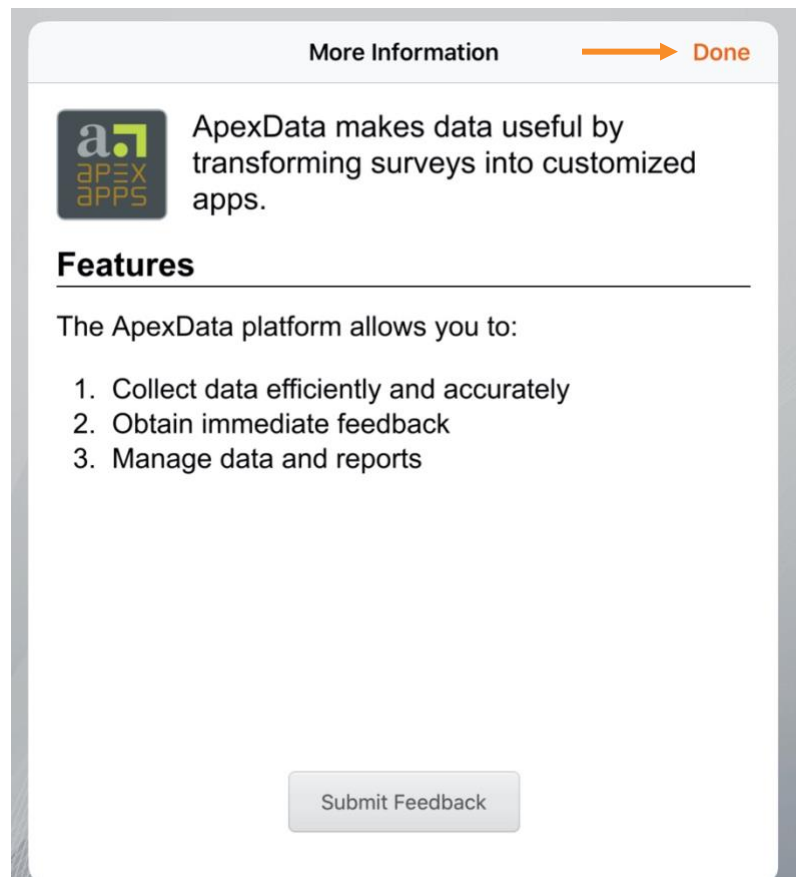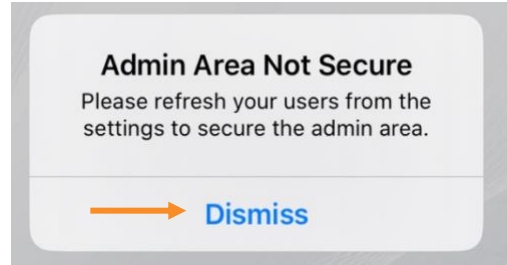
Note: You will need to have the login information for your site and a PIN number in order to complete the steps listed. If you do not know this information, or need to have a PIN created contact support@apexeval.org to get the information needed or to have a PIN created.
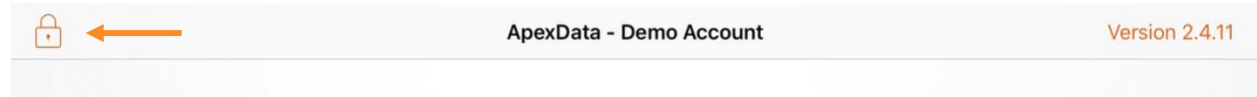
First Login:

Open the Apex Data application and tap on "Done" on the first pop-up message that comes up.

After clearing that initial pop-up message, you may see another message telling you the admin area is not secure. This is only because there is no site logged in yet. Tap on "Dismiss" to close this message.

Admin Area Not Secure
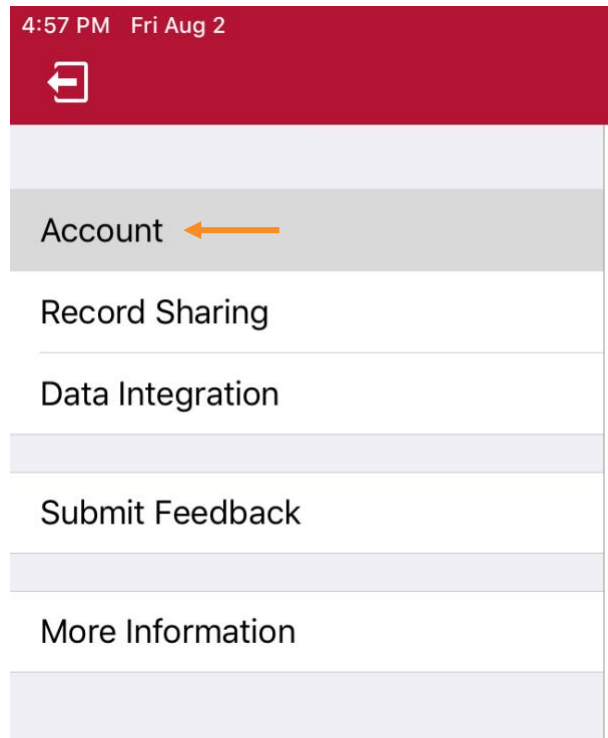Please refresh your users from the settings to secure the admin area.

⟶ **Dismiss**

Once all message boxes have been closed, tap on the orange lock at the top left of the page.
Note: You may be asked for a PIN when doing so. If you are, enter the default PIN of 123456 in order to continue.
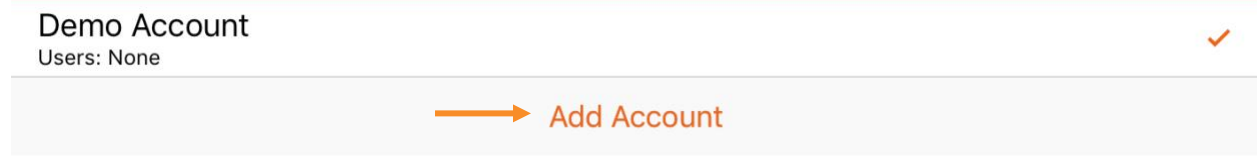
🔒 ⟵ **ApexData - Demo Account** **Version 2.4.11**

Look to the bottom of the screen and tap on the "Settings" icon.

Records | eSolutions | ⟶ Settings

On this page make sure "Accounts" is selected from the list of options on the left.

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Account ⟵

Record Sharing

Data Integration

Submit Feedback

More Information

With "Accounts" selected look to the right side of the screen and tap on "Add Account."

Demo Account
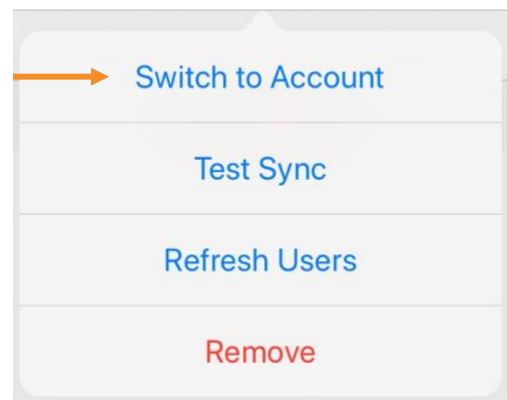Users: None   ✓

⟶ Add Account

Enter the username and password for your site in the appropriate fields and then tap "Login" to add the account.

Add Account
Enter your username and password.

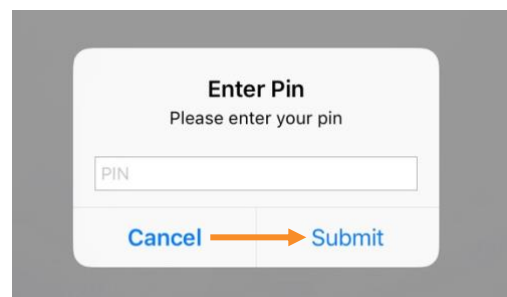| Username |
| Password |

Cancel   Login

You should see a message like the one to the right telling you the account has been added. If you do not get this message double check your login information and internet connection and then try again. If you are still unable to login after ensuring you have a working internet connection contact support@apexeval.org for additional support in adding your account.

Account Added

Dismiss

With the account added you now have to switch to the account to make it the active account on the iPad. To do so tap on the newly added account and select the "Switch to Account" option.
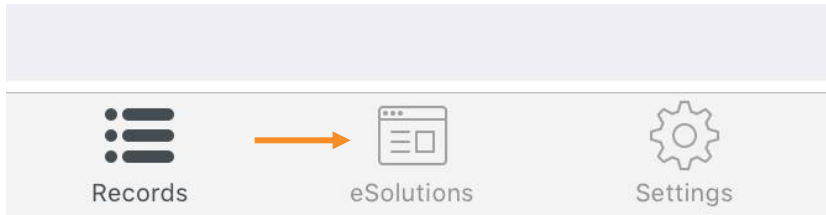
⟶ Switch to Account

Test Sync

Refresh Users

Remove

You will then be asked to enter your PIN in order to switch to the account. Enter your PIN and tap on "Submit" to switch to your sites account.

Enter Pin
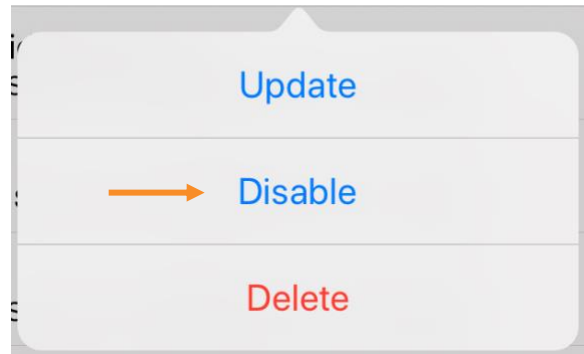Please enter your pin

| PIN |

Cancel ⟶ Submit

Once switched you will notice a checkmark to the right of your added account to indicate that it is now active, and the screenings automatically start downloading for you.

To complete the setup of this new account you will want to disable the provider reviews from showing up in the screening list. To do so tap on the eSolutions option from the bottom of your screen once the downloads have finished.

On this screen scroll down until you see the screenings that are grey in color and start with "Provider Review." Tap on each one and select "Disable."
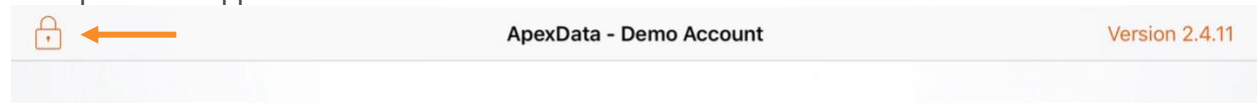

With each of the provider reviews disabled from appearing on the list of screens you are not set to being using the Apex Data application.

Switching Site Accounts:

If you are using your device at multiple locations, you will want to switch between accounts accordingly.
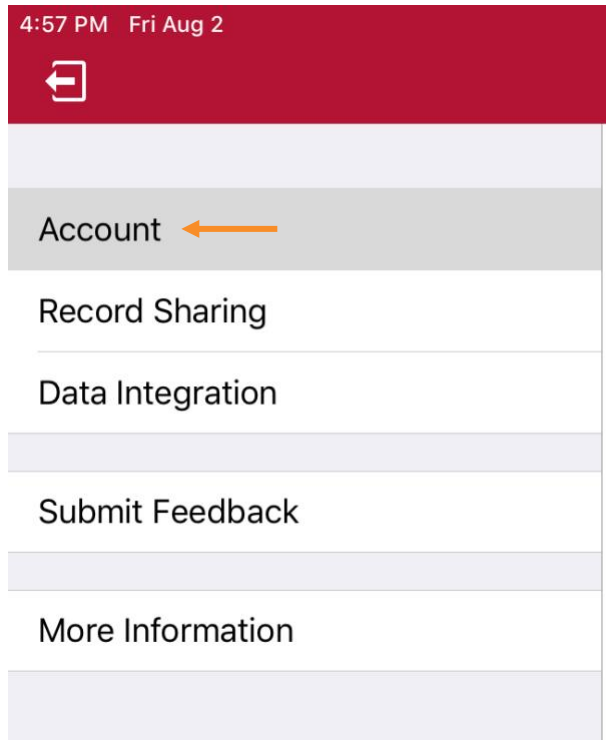
To switch between accounts, tap on the orange lock at the top left of the screen after opening the Apex Data application.
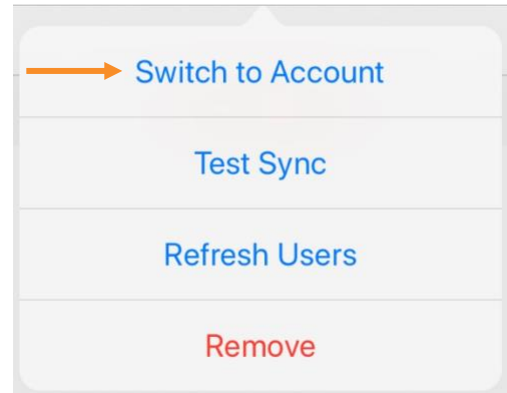

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Look to the bottom of the screen and tap on the "Settings" icon.

Records   eSolutions   →   Settings

On this page make sure "Accounts" is selected from the list of options on the left.

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Account ←

Record Sharing

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More Information

Find the account you would like to switch to on the right side of the screen and tap on the account. Form the options that appear select "Switch to Account."

You will then be asked to enter your PIN in order to switch to the account. Enter your PIN and tap on "Submit" to switch accounts.

Once you switch your screenings for that account will being downloading. Once the download is complete you are now ready to use Apex Data as normal with the different account.