



NAVVIS

Unified Ecosystem Experience

User Guide

January 2020

NAVVIS | Real Life
Life Changing
Changing Healthcare

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NAVVIS Unified Ecosystem Experience (UEE) User Guide.

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Preface

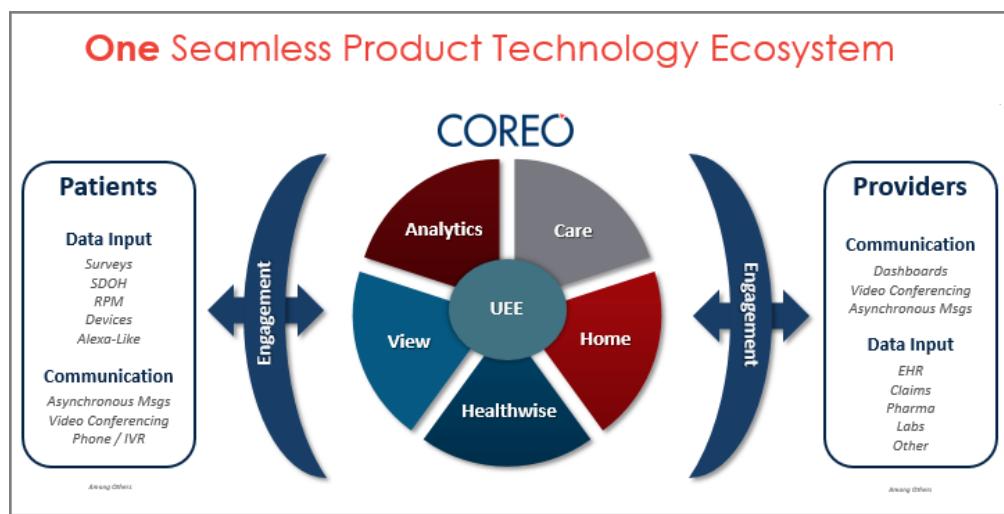
Welcome to the release of the NAVVIS Coreo UEE (Unified Ecosystem Experience) User Guide.

About Navvis Coreo UEE

The UEE application supports the display of Coreo ecosystem applications such as Coreo View, Coreo Home, Coreo Analytics and other external applications such as EMRs (Electronic Medical Records), resource directories, and clinical knowledge bases in a single-panel view for standard screen monitors and widescreen monitors, and in multi-panel view for widescreen monitors.

The user can view all those applications available through the Okta single sign-on (SSO) account on the UEE screen though one panel, two panels, or three panels.

The Coreo ecosystem includes the following applications as illustrated below:



UEE allows its users to configure an application and to view it in a single panel or configure multiple applications to view them in multiple panels on their monitor screens, with each application assigned to a panel.

About Navvis Healthcare

Navvis Healthcare provides counsel to health systems, hospitals, and physician groups on the development of innovative, market-linked strategies to build future-ready health systems, cultivate tomorrow's leaders, and strengthen strategic performance.

Purpose of this Document

This guide is the principal source of information about the Navvis Unified Ecosystem Experience. It contains overviews, processes, and procedures to use the Unified Ecosystem Experience application effectively.

You can refer to the Navvis Coreo View User Guide and the Navvis Coreo Home User Guide for additional sources of information.

Intended Audience

1. **Users:** The users of the Unified Ecosystem Experience application include the following personnel:
 - Clinical staff and hospital administrators
 - Employees, consultants, contractors, or agents of the clinicians or patients who have been invited by the clinician or patient to access and use the service to participate in the care of the patient
 - Any other person involved in the care of the patient, including patient's care providers, patient's insurer or payer, or a social worker, or government agencies
2. **Administrator-users:** The UEE administrator-users are assigned the task of managing other users of the Unified Ecosystem Experience application.

Organization of the Document

This document contains the following modules:

- Module 1: Coreo UEE Overview
- Module 2: User Onboarding
- Module 3: UEE Panel View—Screen Layout and Navigation
- Module 4: Display Settings to Configure UEE Panel View
- Module 5: Configuring a Single Panel Mode
- Module 6: Creating Presets for Multi-Panel Mode
- Module 7: Screen Displays in Maximized View

Document Conventions

This document uses the following conventions:

Convention	Item
boldface font style	Menu items, Tab names, Text box names, List box names, Button names and Navigation paths as displayed in the UEE application user interface (UI)
<u>Text in blue</u>	Hyperlinks
<i>Italics</i> font style	Example
	Note: Notes contain helpful suggestions. A note informs the reader about any deviation in the sequence of instructions or helps the reader save time in understanding why something is not working.
	Tip: The information helps the user solve a problem faster or to perform an action differently.

Unified Ecosystem Experience (UEE)—User Function



1 Coreo UEE Overview

Coreo UEE provides the convenience of viewing all the applications available through the Okta single sign-on (SSO) account that the users have access to on standard screen monitors and widescreen monitors either in a single-panel mode or in a multi-panel mode.

The following illustration gives an overview of how the UEE application works:

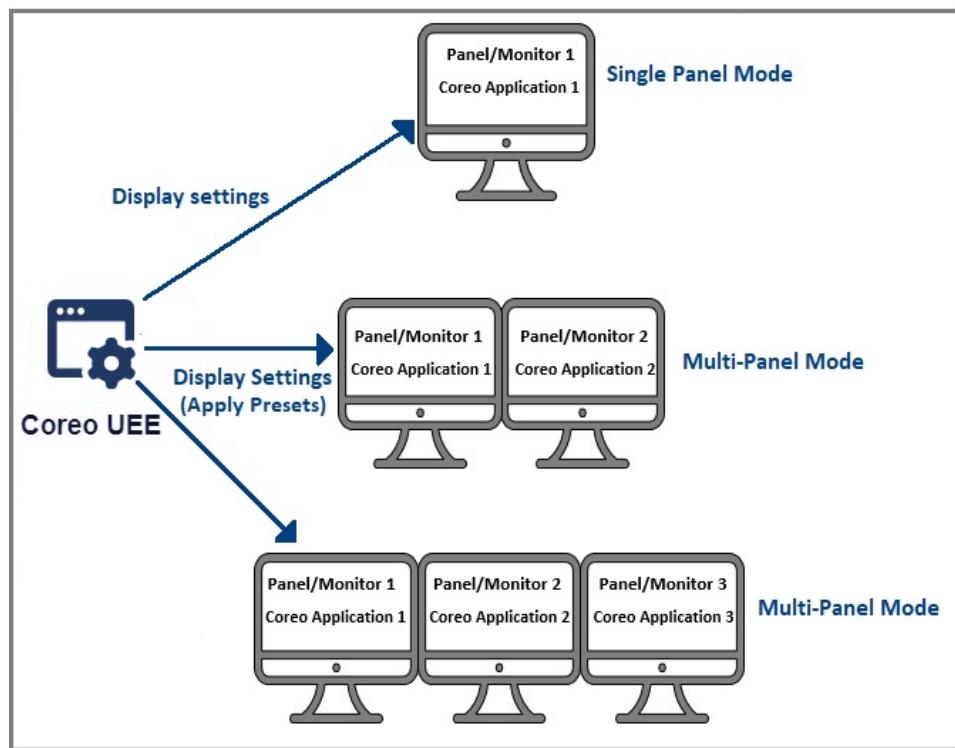


FIGURE 1. COREO UEE OVERVIEW



As a pre-requisite to use the Coreo UEE application, you must have the access rights to the Coreo View application given by your Navvis administrator.

Use the display settings feature in UEE to do the following:

- Configure the monitor screen to view the applications either in a single-panel mode or in a multi-panel mode.
- Change the toolbar preference on the UEE screen to pin the applications and presets so that the user can apply the required configurations to the screen easily.

2 User Onboarding

A first-time user of the Unified Ecosystem Experience (UEE) receives an automated email verification link from the Navvis administrator to activate the Okta SSO account.

The Okta single sign-on (SSO) service provides a single secure home page to log into the UEE application and other applications, including those that are part of the Coreo ecosystem.

You can use only those applications to which the Navvis administrator has given you access.

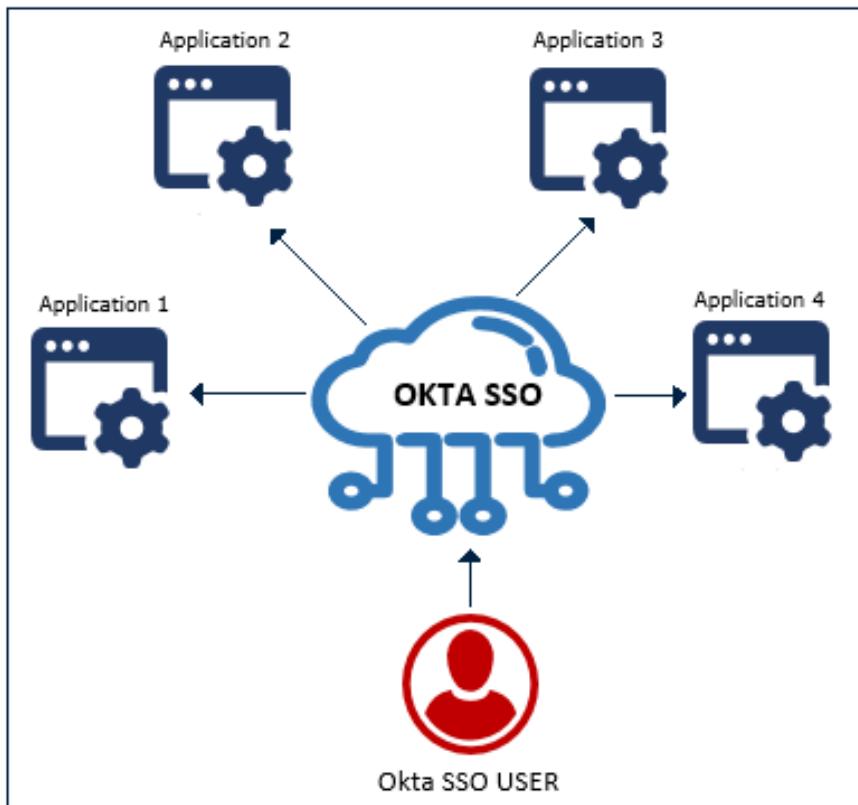


FIGURE 2. OKTA SINGLE SIGN-ON (SSO) LOGIN

2.1 Log into UEE–First-Time User

Follow these steps to activate the Okta SSO account to access the Unified Ecosystem Experience application:

1. Open the email link sent to your email inbox by the Navvis administrator.

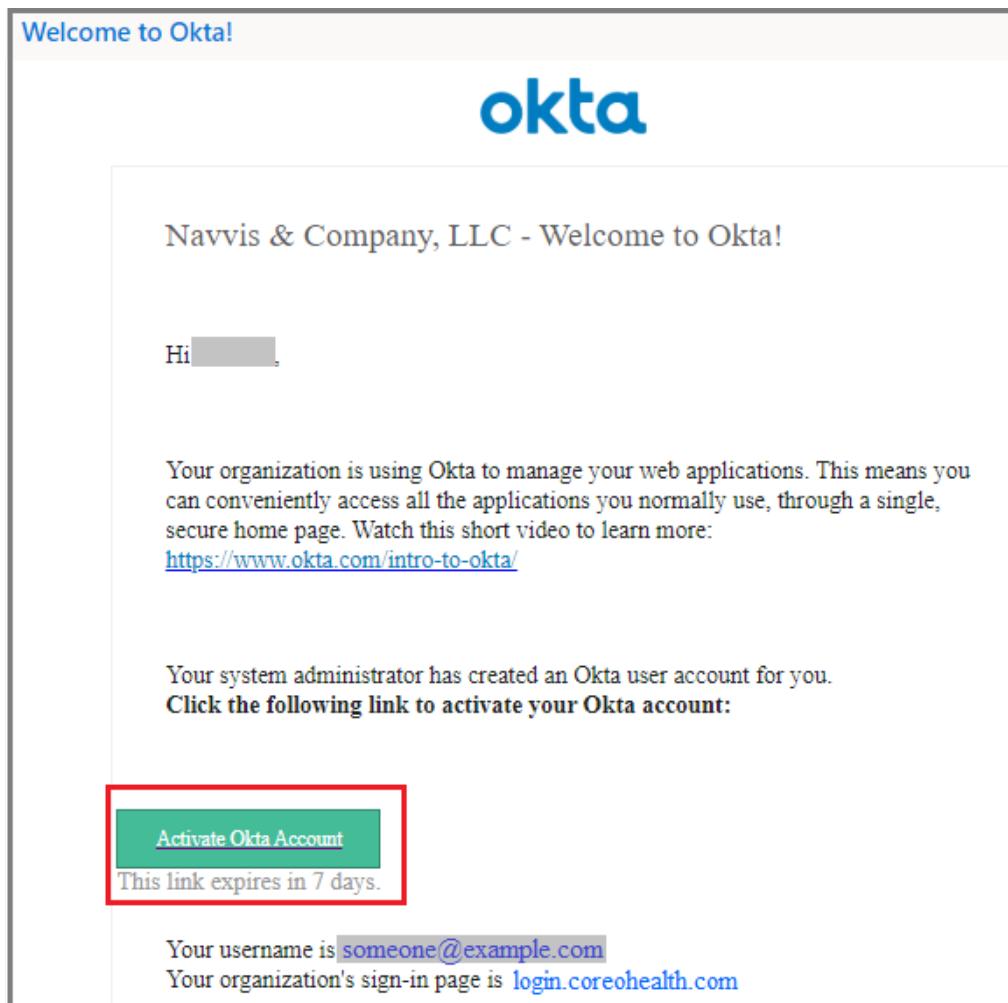


FIGURE 3. EMAIL NOTIFICATION

2. Select the [Activate Okta Account](#) link. The **Create your Navvis & Company, LLC account** screen opens.

Welcome to Navvis & Company, LLC. Create your Navvis & Company, LLC account

 Enter new password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username.

 Repeat new password

 Choose a forgot password question

What is the food you least liked as a child? ▾

Answer

 Click a picture to choose a security image

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.

FIGURE 4. CREATE YOUR NAVVIS & COMPANY, LLC ACCOUNT SCREEN

3. Enter a new password in the **Enter new password** box.

The password must be at least eight characters long and must be a combination of these following characters:

Description	Characters
Upper case characters	A – Z
Lower case characters	a – z
Digits	0 – 9
Special characters	~ ! @ # \$ % ^ & * _ - + = ` \(){}[]:;''<>, . ? /

Table 1. SYSTEM ACCEPTED PASSWORD CHARACTERS

4. Reenter the password in the **Repeat new password** box.

In case you forget the existing password, it is recommended to add a security question to reset a new password.

5. Under **Choose a forgot password** question on the **Create your Navvis & Company, LLC account** screen, select the arrow to view the questions.

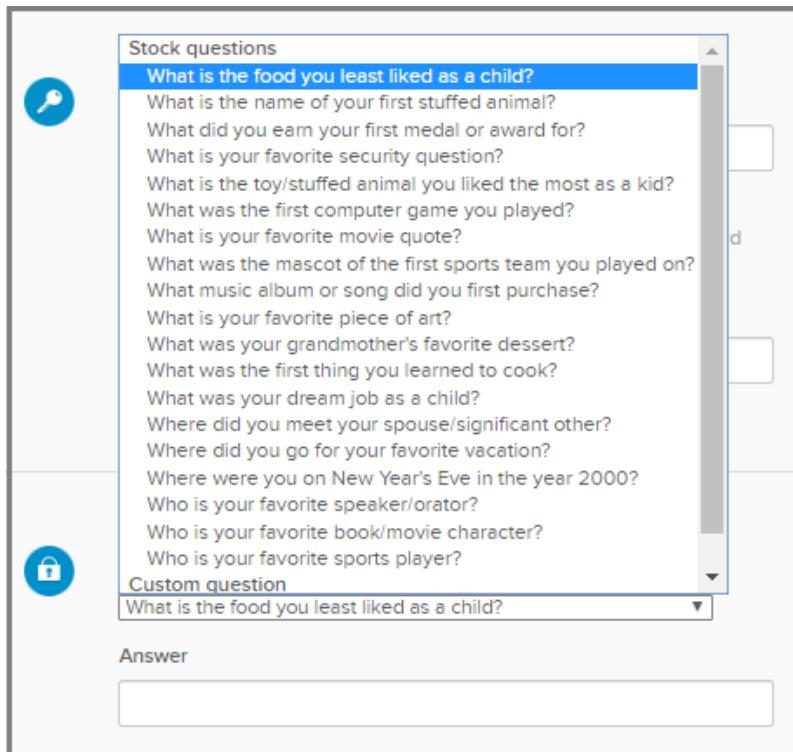


FIGURE 5. CHOOSE A FORGOT PASSWORD QUESTION

6. Choose a security question from the list.

7. In the **Answer** box, enter the answer. You must remember this answer because it is used at a later date to reset a forgotten or expired password.
8. Choose a picture as a security image on the **Create your Navvis & Company, LLC account** screen, and then select **Create My Account**.



The security image displays in the [Coreo Sign In screen](#) on entering the user name.

9. The **Coreo** landing screen opens.

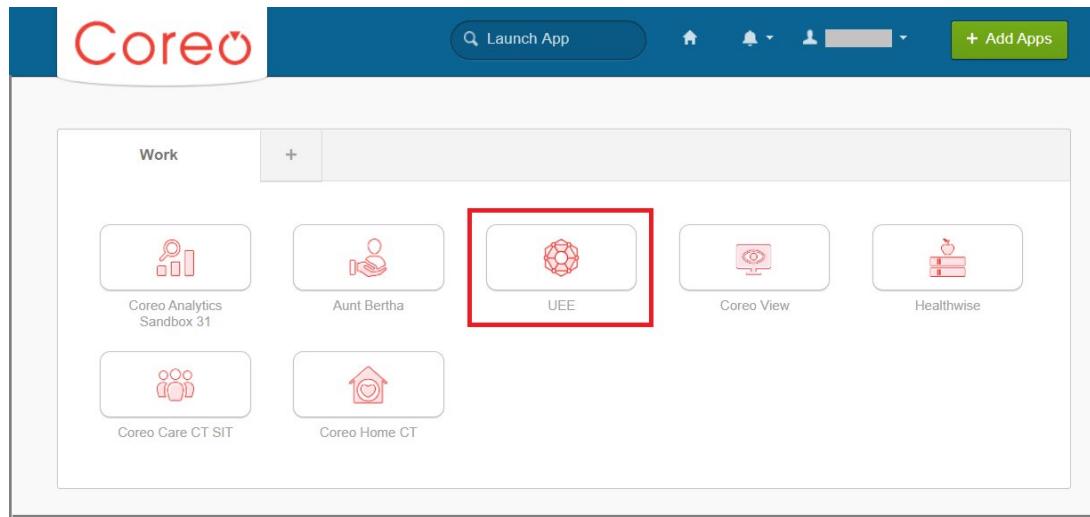


FIGURE 6. COREO LANDING SCREEN

10. Select the **UEE** button on the landing screen. You can view only those applications on the Coreo landing screen to which the Navvis administrator has given you access.

11. The **Coreo Sign In** screen opens.

Once the user accepts EULA and the Okta SSO account is activated, the new user becomes an existing user.

As an existing user, go to login.coreohealth.com to open the Coreo Sign In screen.

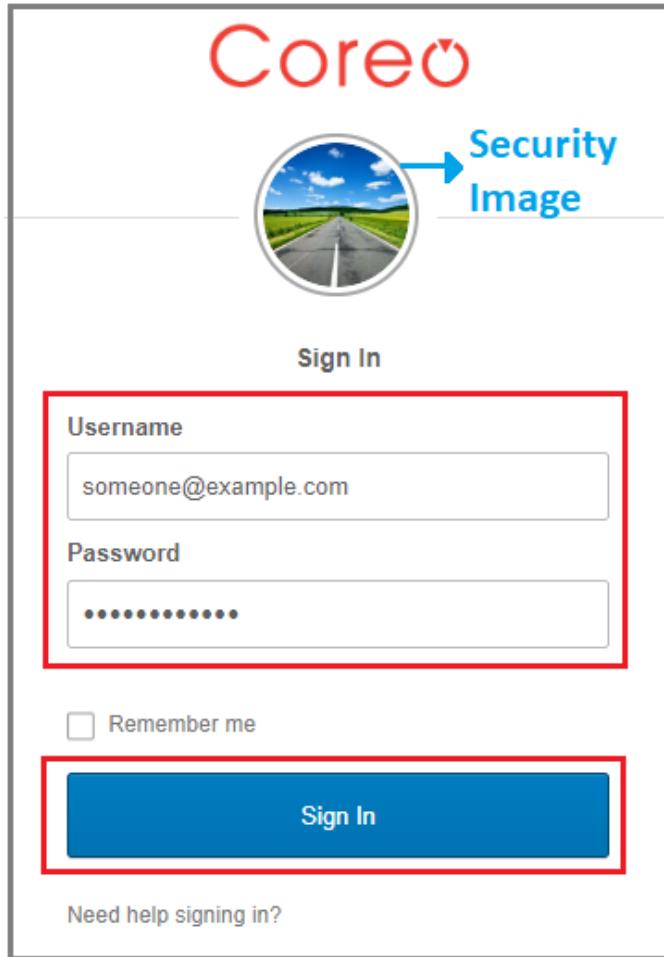


FIGURE 7. COREO SIGN IN SCREEN

12. Enter the user ID in the **Username** box.
13. Enter the **password** that you have set in the **Password** box.
14. Select **Sign In**.

15. The EULA screen displays for a first-time user of UEE. A first-time user of UEE is required to accept the EULA (End User License and Business Associate Agreement) before accessing the UEE application.

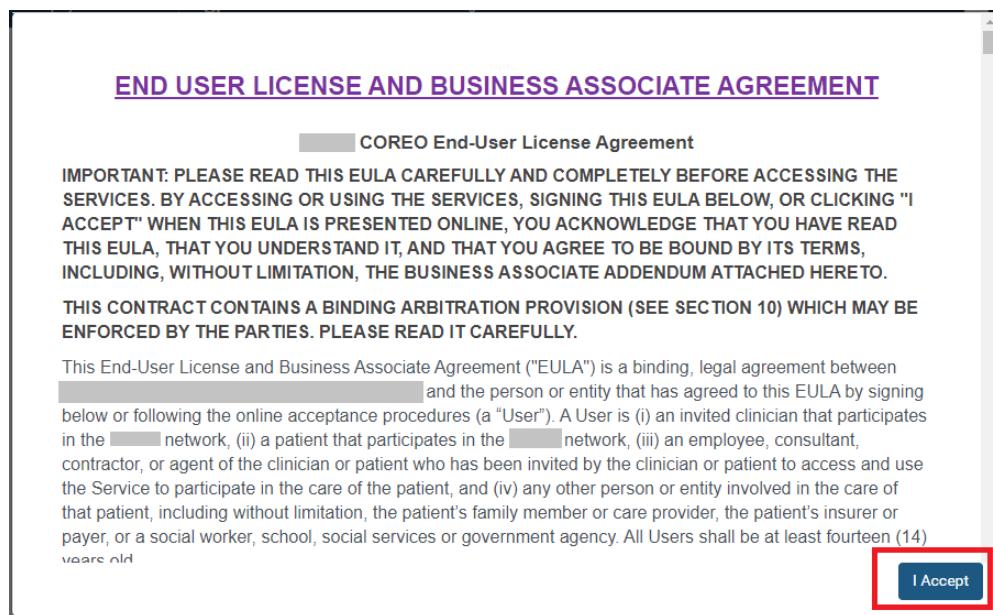


FIGURE 8. EULA PAGE

16. Read the terms and conditions and select the **I Accept** button. Your Okta SSO account is activated successfully, and the UEE home page opens.

2.2 About Locked Okta SSO Account

The Okta SSO account locks for the following reasons:

- The user exceeds five failed login attempts within 24 hours. The login attempts fail when the user enters an incorrect password.

The locked account resets after 24 hours, and the user can log in to the account after 24 hours without contacting the Navvis administrator.



To unlock the Okta SSO account immediately after the five failed login attempts, contact the Navvis administrator.

- The Navvis administrator can lock the Okta SSO account as per the company lock account policy.

2.3 Reset a Forgotten or Expired Password

The Okta SSO password policy specifies that the password expires after 60 days, and the user must reset the password periodically.

Also, if the user forgets the password, Okta gives the option to reset the password.

Follow these steps to reset the password:

1. Go to login.coreohealth.com to open the **Coreo Sign In** screen.

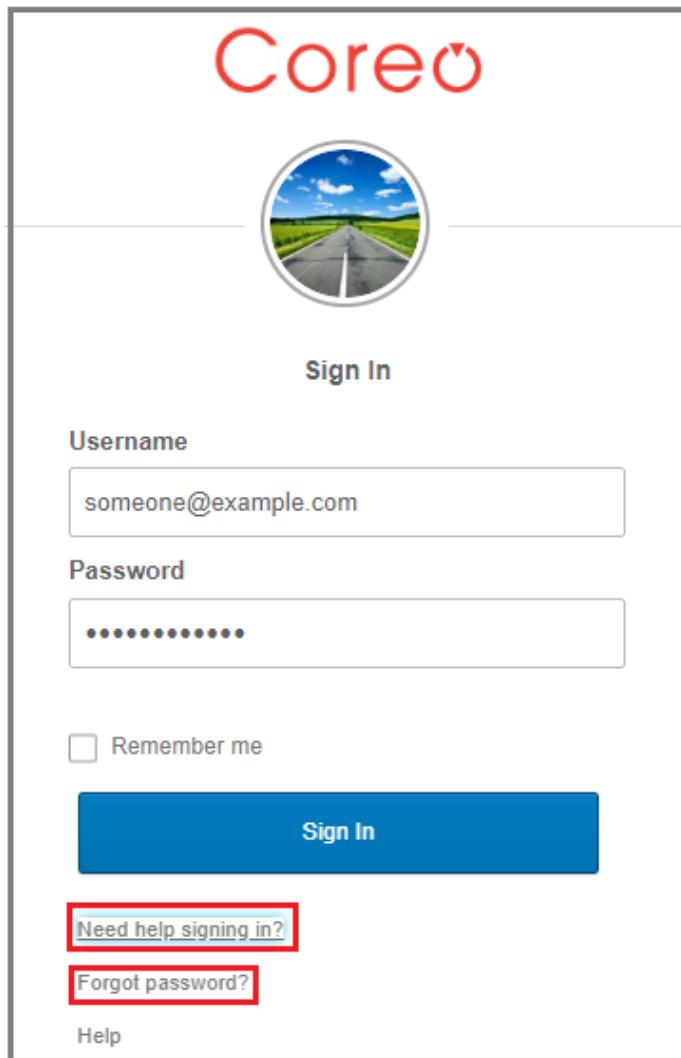


FIGURE 9. COREO SIGN IN SCREEN—NEED HELP SIGNING IN

2. Select the **Need help signing in** drop-down list.

3. Select the **Forgot Password** option to open the **Coreo Reset Password** screen.



FIGURE 10. COREO RESET PASSWORD SCREEN

4. Enter the email or the user name in the **Email or Username** box.
5. Select **Reset via Email**. You will receive an email with a verification link from the Navvis administrator. You can reset the password using the verification link sent to your email address.
6. Reset the password with the following considerations:
 - The new password cannot be among the previous six passwords.
 - The password expires after 60 days, and the user must reset the password periodically.
 - The user will be locked out of the application for 15 minutes after five failed login attempts. The login attempts fail when the user enters an incorrect password. Contact the Navvis administrator to reset the password.

On the successful resetting of the password, you can use the new password to log into your Okta SSO account.

3 UEE Panel View—Screen Layout and Navigation

The screen layouts in the UEE application are similar in appearance. However, a few user interface elements differ depending upon the following reasons:

- The number (one, two or three) of panels that are displayed on the screen
- The type of user login—a first-time user of UEE or an existing user
- The user's role and permissions

The following figure is the default screen view of the UEE application when the user logs into the application as a first-time user.

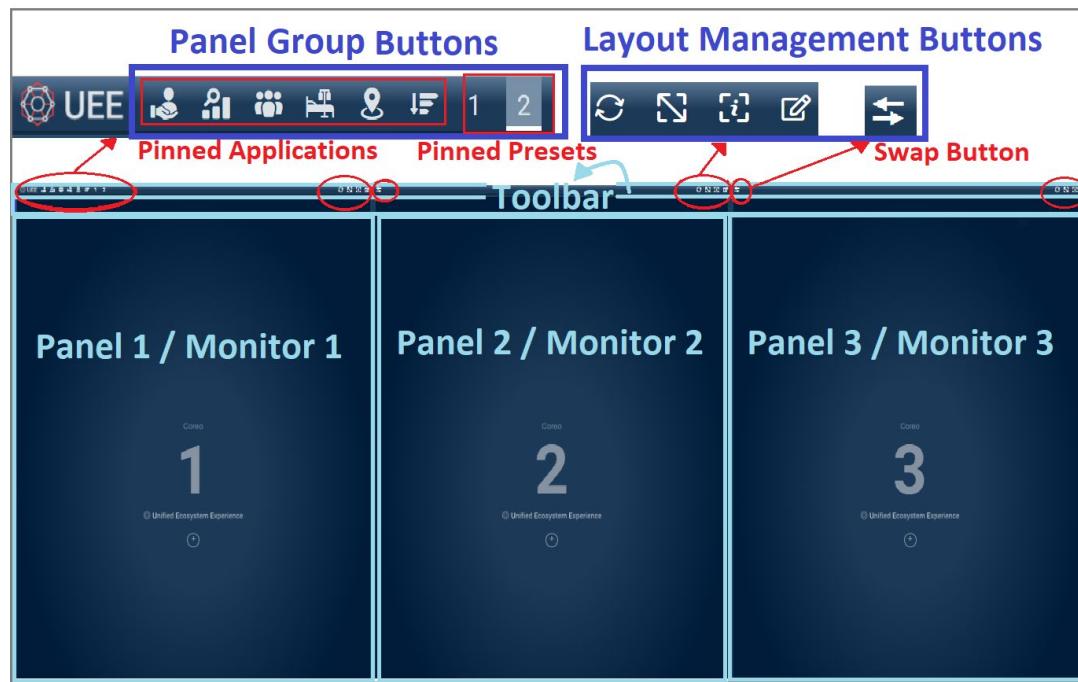


FIGURE 11. UEE SCREEN ON FIRST-TIME LOGIN—3-PANEL VIEW

The UEE home page layout includes the following areas:

- Toolbar: Includes buttons to display the applications and presets in the panels, to access the display settings for the panel, and to control the magnification settings of the panel screen.
- Panel/Monitor: You can assign an application to a panel and can have a maximum of a 3-panel view on the monitor screen.

3.1 Toolbar Elements

The toolbar runs across all the three panels on the UEE screen. The **Refresh** button, the **Maximize Display** button, the **Help** button, and the **Display Settings** button are available for each panel. These buttons are located in the upper-right corner of the panel on the toolbar.

The **Swap** button is located in the upper-left corner of the second panel and third panel on the toolbar.

Refer to the following table to view details about the elements on the toolbar.

Icon	Element name	Description
 UEE	UEE Logo	The UEE logo
Panel Layout Management Buttons		
	Refresh button	Use this to refresh the Coreo application of that panel.
	Maximize Display toggle button	Use this button to enlarge the panel layout view to fit the entire screen of the monitor. Select the same button or click Esc on the keyboard to exit the full screen.
	UEE Help button	Use this button to open the UEE user help document.
	Display Settings button	Use this button to open the Display Settings pop-up window. In the pop-up window, you can create, modify, or delete presets. You can also pin a Coreo application or a preset to the toolbar using this window.
	Swap button	Use this to interchange the applications between two panels.

Panel Group Buttons—Pinned Applications		
	Aunt Bertha application button	Click this button to view the Aunt Bertha application in a single-panel view on your monitor screen.
	Coreo Analytics application button	Click this button to view the Coreo Analytics application in a single-panel view on your monitor screen.
	Coreo Care CT application button	Click this button to view the Coreo Care application in a single-panel view on your monitor screen.
	Healthwise application button	Click this button to view the Coreo Healthwise application in a single-panel view on your monitor screen.
	Coreo Home CT application button	Click this button to view the Coreo Home application in a single-panel view on your monitor screen.
	Coreo View – Bed View application button	Click this button to view the Coreo View-Bed View layout in a single-panel view on your monitor screen.
	Coreo View – Geomapping View application button	Click this button to view the Coreo View-Geo-Map View layout in a single-panel view on your monitor screen.
	Coreo View – Prioritized View application button	Click this button to view the Coreo View-Prioritized View layout in a single-panel view on your monitor screen.
Panel Group Buttons—Default-Pinned Presets		
	Preset 1	A blank 2-panel preset to which you can assign applications in the Display Settings window
	Preset 2	A blank 3-panel preset to which you can assign applications in the Display Settings window

Table 2. TOOLBAR—UI ELEMENT NAMES



You can view only those applications to which the Navvis administrator has given you access.

The list of applications mentioned above is not exhaustive.

The icon representing each application may be subject to change in the newer versions of the applications.

3.2 Panel Elements

Refer to the following table to view details about the elements in the panel.

Icon and Element Name	Description
1 Panel 1	The first panel The UEE screen can display a maximum of three panels on the monitor screen. The first panel is the Left (L) panel.
2 Panel 2	The second panel The second panel is the Central (C) panel.
3 Panel 3	The third panel The third panel is the Right (R) panel.
 Display Settings button	Use this button to open the Display Settings pop-up window . You can click anywhere in the panel area to open the Display Settings window.
 UEE logo	The UEE logo

Table 3. PANEL-UI ELEMENTS NAMES

4 Display Settings to Configure UEE Panel View

Use the display settings feature in UEE to configure the following modes on your monitor screen:

- Single-panel mode: You can configure a Coreo application to view it in a single panel layout. The single panel mode is available on standard screen monitors and widescreen monitors.
- 2-panel mode (Multi-panel mode): You can configure the Coreo applications to view them in a 2-panel layout, with each application assigned to a panel. The 2-panel mode is compatible with widescreen monitors only. You can save the configurations of a 2-panel mode as presets.
- 3-panel mode (Multi-panel mode): You can configure the Coreo applications to view them in a 3-panel layout, with each application assigned to a panel. The 3-panel mode is compatible with widescreen monitors only. You can save the configurations of a 3-panel mode as presets.

UEE also allows its users to pin the Coreo applications and presets on the toolbar of the UEE screen to access and apply the screen configurations easily.

4.1 Display Settings Window—Layout and Navigation

UEE provides the flexibility to configure different applications to view them in different panels on the monitor.

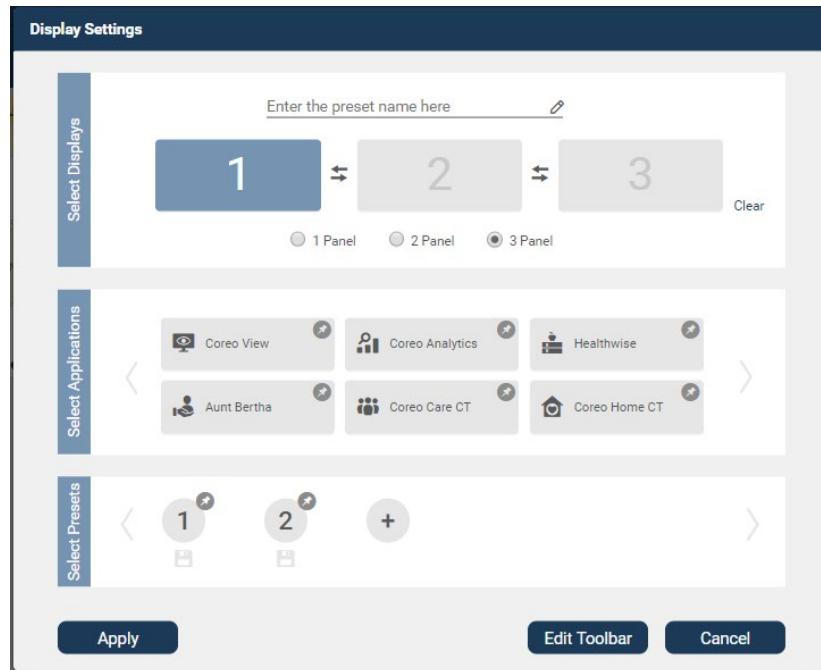
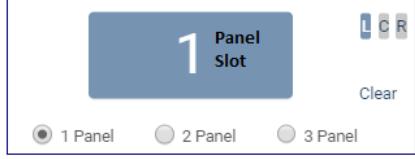
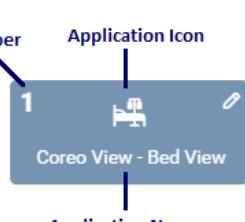
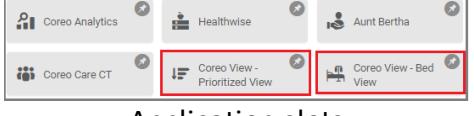


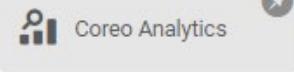
FIGURE 12. DISPLAY SETTINGS POP-UP WINDOW

Refer to the following table to view details about the elements in the **Display Settings** window.

Icon and Element Name	Description
 Select Displays group	<p>In this group, do the following:</p> <ul style="list-style-type: none"> • Select the number of panels to display on the monitor screen. • Swap the applications between the panel slots when configuring the applications for a 2-panel view and a 3-panel view. • Delete the applications assigned to the panel slots using the Clear button.
 1 Panel slot	<p>Use this slot to assign a Coreo application to the first panel on your display screen.</p> <p>In a single panel view, you can display the Coreo application either in the left panel or in the central panel or the right panel.</p>
 First-panel slot-Empty and Highlighted	<p>An empty panel slot. When the user selects a panel slot, it highlights a blue color.</p>
 First-panel slot-Assigned	<p>A panel slot with an application assigned to it</p>
 L C R position buttons	<p>Use these buttons to position the application view either in the (L) left panel or in the (C) central panel or the (R) right panel on the monitor screen.</p> <p>These buttons are available only when you select the 1 Panel button.</p>

Icon and Element Name	Description
 <p>2 Panel slot</p>	<p>Use this slot to assign a Coreo application to the second panel on your display screen.</p> <p>In a 2-panel mode, you can assign an application each to both panel 1 and panel 2.</p>
 <p>Second-panel slot—Empty and Highlighted</p>	<p>A selected panel slot to which an application can be assigned</p>
 <p>Panel slot—Non-Highlighted</p>	<p>A cleared panel slot.</p>
 <p>3 Panel slot</p>	<p>Use this slot to assign an application to the third panel on your display screen.</p> <p>In a 3-panel mode, you can assign an application each to panel 1, panel 2 and panel 3.</p>
 <p>Third-panel slot—Empty and Highlighted</p>	<p>A selected panel slot to which an application can be assigned</p>
 <p>Swap button</p>	<p>Use this button to swap the applications between the panel slots when configuring the applications for a 2-panel view and a 3-panel view.</p>
 <p>Clear button</p>	<p>Use this button to delete the applications assigned to the panel slots.</p>

Icon and Element Name	Description
 Panel button group	In this button group, select the number of panels to display on the monitor screen.
 1 Panel button	Select this button to display the application in a single panel on the monitor screen.
 2 Panel button	Select this button to display the applications in a 2-panel layout on the monitor screen, with each application configured to a panel.
 3 Panel button	Select this button to display the Coreo applications in a 3-panel layout on the monitor screen, with each application configured to a panel.
 3 Panel button–Selected	A selected radio button
<input data-bbox="285 1214 709 1256" type="text" value="Enter the preset name here"/> Preset name box	Enter the name of the preset in this box to save the preset and apply it to the monitor screen. You can save only 2-panel and 3-panel configurations as presets.
 Select Applications group	In this group, do the following: <ul style="list-style-type: none"> Select the application to assign to the panel slot. Pin the applications to the toolbar of the UEE screen using the Edit Toolbar button in the lower-right corner of the Display Settings window.
 Application slots	The applications to assign to the 1 Panel slot to configure a single panel mode. Coreo View – Prioritized View, Coreo View – Bed View, and Coreo View – Geomap View

Icon and Element Name	Description
	applications are available for 1-panel slot only.
 Application slot–blue	A selected application—an application that is assigned to a panel slot
 Pin icon–blue	A pinned application. An application that is pinned to the toolbar of the UEE panel screen on the monitor
 Application slot–grey	An application that is not assigned to a panel slot
 Pin icon–grey	An unpinned application. An application that is not pinned to the toolbar of the UEE panel screen on the monitor.
 Application slots	The applications to assign to the 2 Panel slots and 3 Panel slots. Configure the 2-panel mode and 3-panel mode, respectively.
 Left Chevron icon	Use this to navigate to the left side of the monitor-screen and access the applications that are not within the default view of the Display Settings window.
 Right Chevron icon	Use this to navigate to the right side of the monitor-screen and access the applications that are not within the default view of the Display Settings window.

Icon and Element Name	Description
 Select Presets group	<p>In this group, do the following</p> <ul style="list-style-type: none"> Save the configurations as presets to apply to the UEE panel screen for a 2-panel mode and a 3-panel mode. Pin the applications to the toolbar of the UEE screen using the Edit Toolbar button in the lower-right corner of the Display Settings window.
 Preset icon	A saved preset. Save a configuration as a preset for a 2-panel or a 3-panel view only.
 Pin icon--grey	A non-pinned preset A preset that is not pinned to the toolbar of the UEE panel screen
 Pin icon--blue	A pinned preset A preset that is pinned to the toolbar of the UEE panel screen on the monitor
 Preset icon--blue	A highlighted preset A preset icon highlights when you select an existing configuration (the number of panels and the applications assigned to them) in the Display Settings window
 Save button	Use this to save the preset.
	Use this button to create a new preset. You can save a configuration as a preset for a 2-panel or a 3-panel view only.

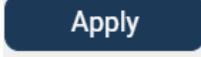
Icon and Element Name	Description
Add Preset button	
 Apply Apply button	Use this button to apply a single panel configuration or presets to the UEE panel screen.
 Edit Toolbar Edit Toolbar button	Use this button to edit the toolbar of the UEE panel screen. You can pin the applications and presets to the toolbar.
 Cancel Cancel button	Use this button to close the Display Settings window.

Table 4. DISPLAY SETTINGS WINDOW–UI ELEMENT NAMES

5 Configuring a Single Panel Mode

Single panel mode in UEE gives you the provision to view an application in a single panel frame. You can configure the view using the display settings feature to position the application view either on the left side of the monitor screen, or right side or in the center.

You, as a user, have the flexibility of customizing the toolbar by pinning the applications so that you can apply the application quickly to the monitor screen and switch between them easily.

5.1 Create a Single Panel View

Follow these steps to configure a single panel view on the UEE screen of your monitor:

1. Click the **UEE** application on the [Coreo Landing screen](#) to open the UEE screen.



For a first-time user of the UEE application, a blank [3-panel layout](#) displays as the default screen view. If you are an existing user, the panel view configuration (preset) or the application that you last applied during your previous login session displays on the UEE screen.

2. Select the **Display settings**  button on the toolbar or click anywhere in the blank panel frame to open the **Display Settings** window.

3. In the **Select Displays** group, select the **1 Panel** radio button. A single panel slot displays.

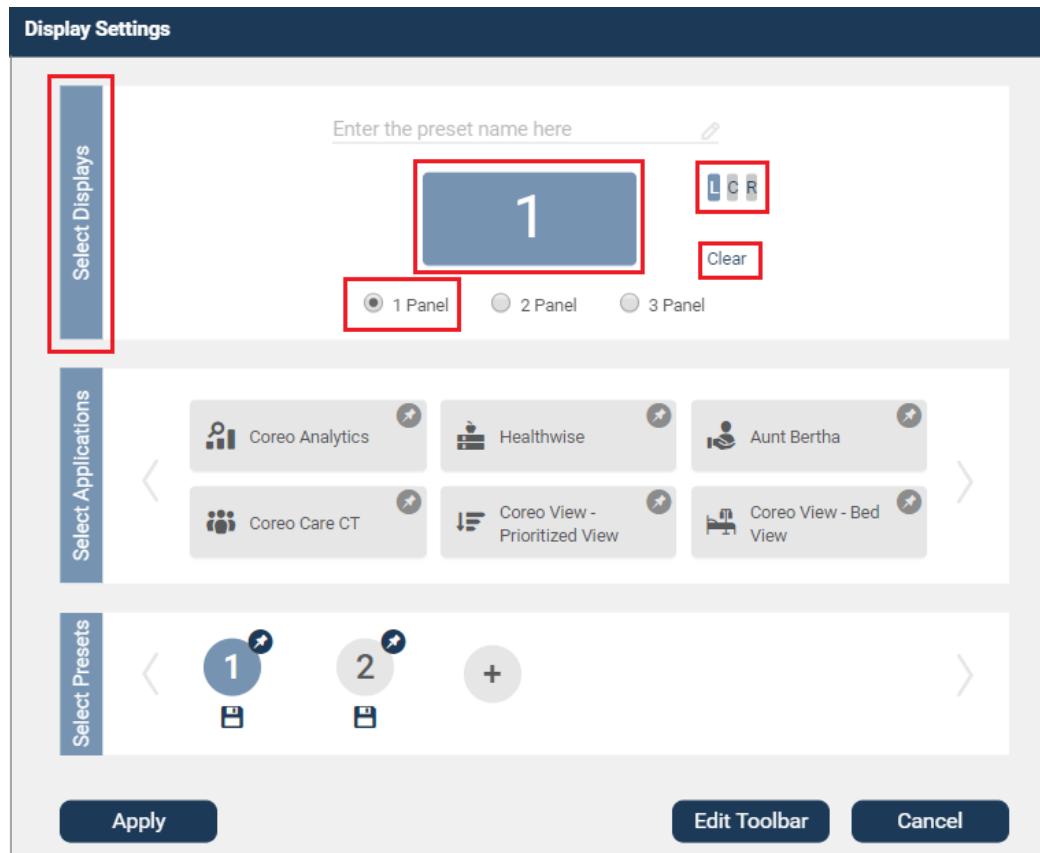


FIGURE 13. DISPLAY SETTINGS WINDOW—1 PANEL SLOT

If you switch from the 2-Panel button or 3-Panel button to the 1-Panel button, an existing application that is already assigned to the first panel displays in the Panel 1 slot. You can use the Clear button to clear the Panel 1 slot to reassign another application.



Similarly, if you switch from the 2-Panel button to the 3-Panel button, the existing applications that are already assigned to the first-panel and second-panel display in the Panel 1 and panel 2 slots, respectively.

4. In the **Select Applications** group, select the application to assign to the single panel slot.



In the Select Applications group, you can view only those applications to which the Navvis administrator has given you access.

For a single panel slot, the Coreo View application under the **Select Applications** group is available in three views, **Coreo View-Prioritized View**, **Coreo View-Bed View**, and **Coreo View-Geomapping View**.

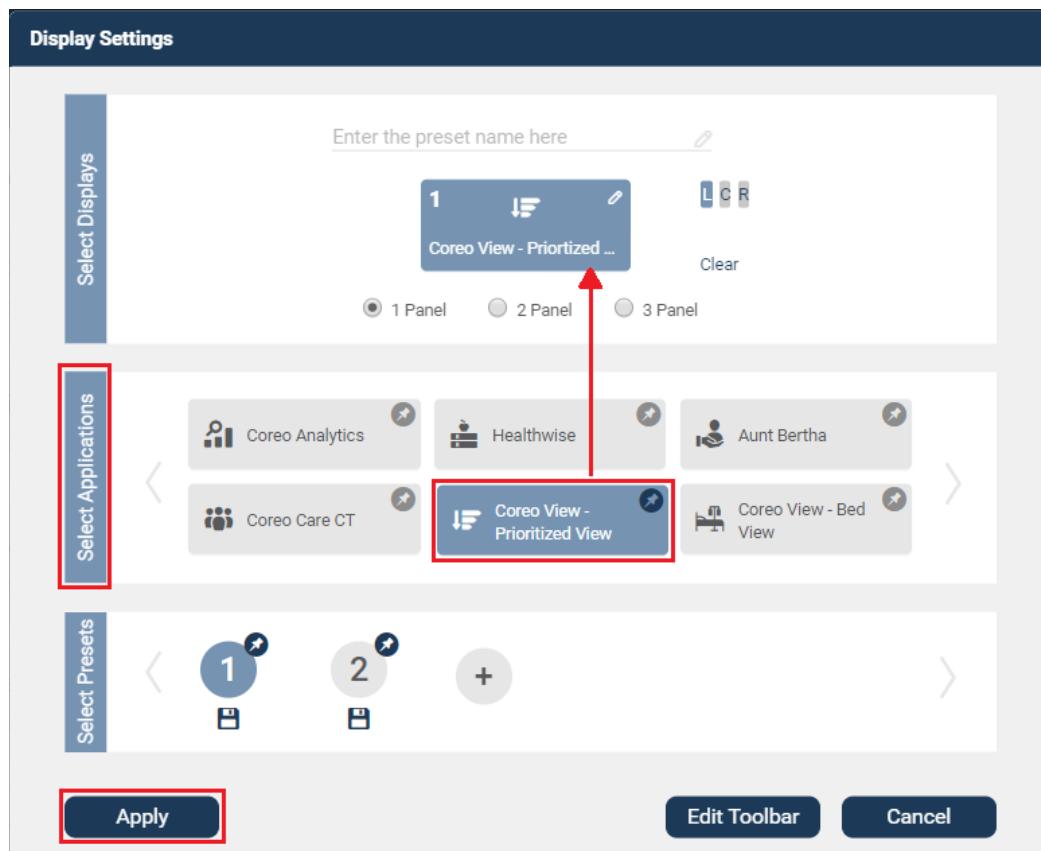


FIGURE 14. DISPLAY SETTINGS WINDOW—ASSIGNING AN APPLICATION

- Click the **Apply** button to apply the single panel configuration to the UEE screen on your monitor. The default position of the configured panel is on the left (L) side of the monitor screen.

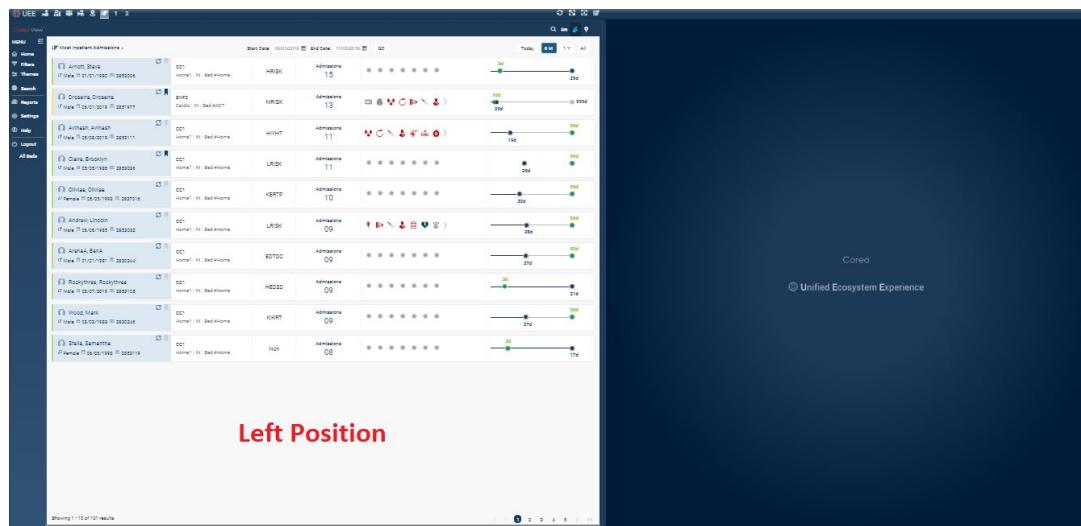


FIGURE 15. MONITOR SCREEN IN SINGLE PANEL MODE—LEFT (L) POSITION

- To position the configured panel at the center of the screen, click the **C** button in the Display Settings window and then click the **Apply** button.

The configured panel displays in the middle of the monitor screen.

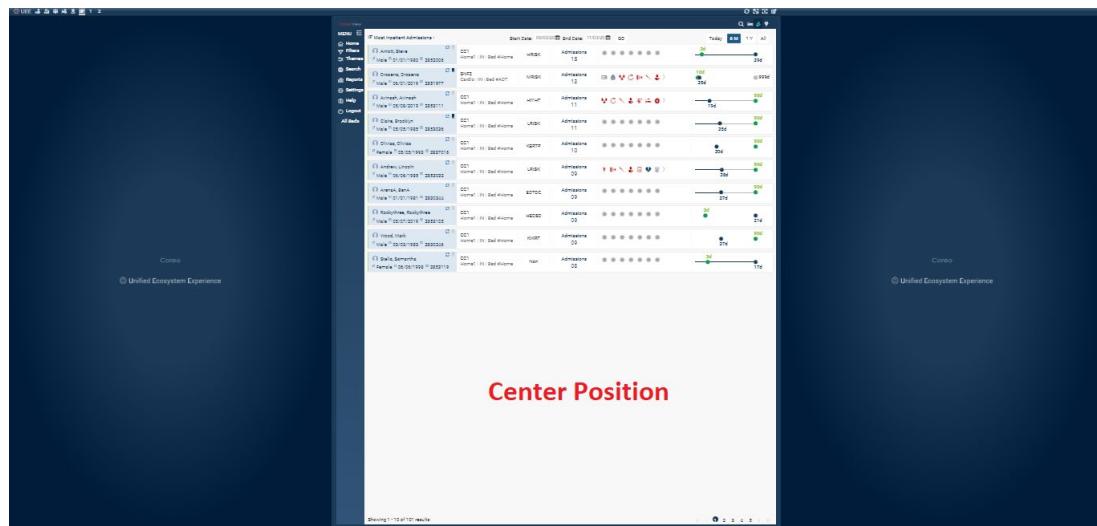


FIGURE 16. MONITOR SCREEN IN SINGLE PANEL MODE—CENTER (C) POSITION

7. To position the configured panel on the right side of the screen, click the **R** button in the [Display Settings window](#) and then click the **Apply** button. The configured panel displays on the right side of the monitor screen.

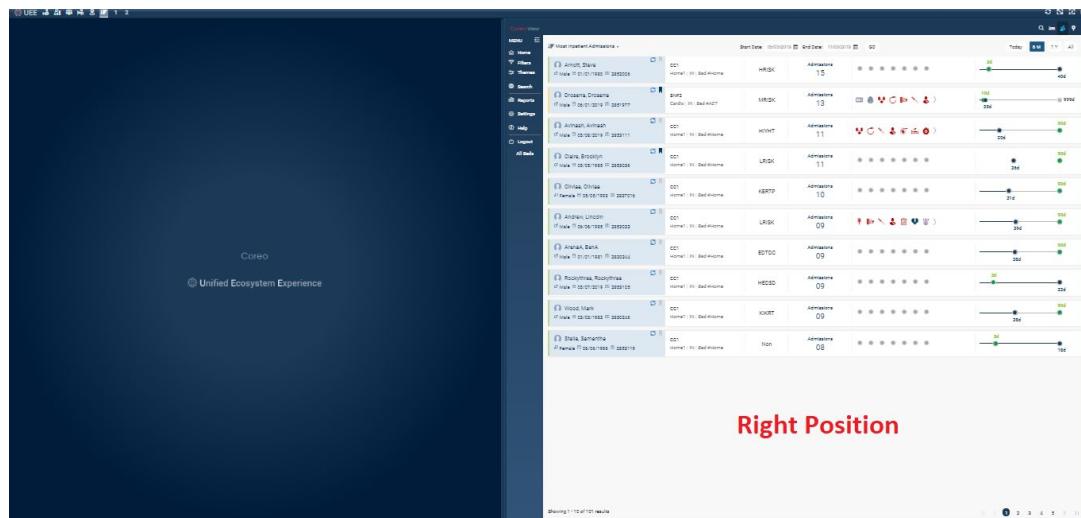


FIGURE 17. MONITOR SCREEN IN SINGLE PANEL MODE—RIGHT (R) POSITION

When you assign the **Coreo View-Bed View** application to the single panel slot in the **Display Settings** window and apply the configuration to the screen, the configured panel with the Bed view application stretches across the entire width of the monitor screen.

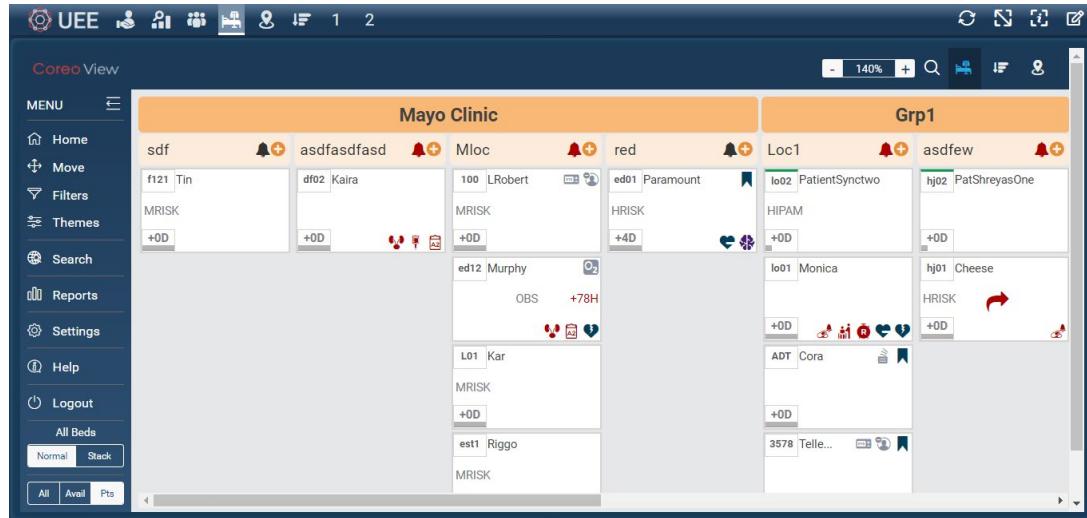


FIGURE 18. MONITOR SCREEN IN SINGLE PANEL MODE—BED VIEW

Similarly, when you assign the **Coreo View-Geomap View** application to the single panel slot in the **Display Settings** window and apply the configuration to the screen, the configured panel with the Geomap view application stretches across the entire width of the monitor screen.

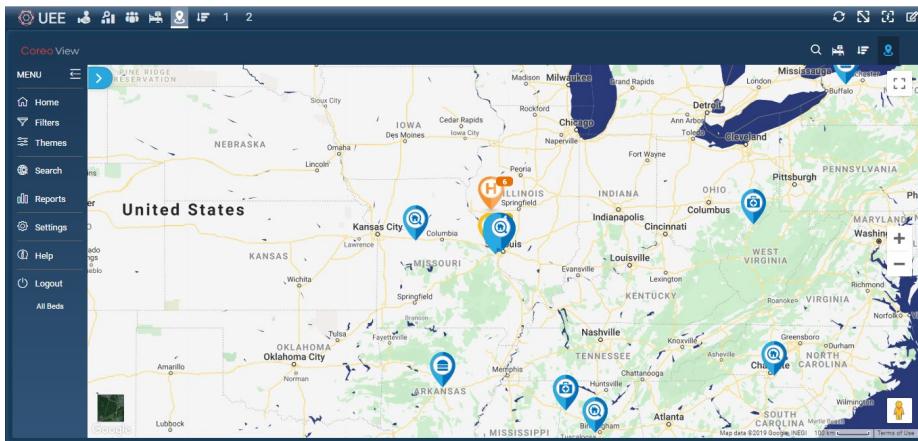


FIGURE 19. MONITOR SCREEN IN SINGLE PANEL MODE—GEO-MAP VIEW

5.2 Pin an Application to the Toolbar

You can customize the toolbar by pinning applications to it. You can switch between applications and apply them to the screen quickly. Select a pinned application on the toolbar and apply it to the UEE screen, it displays in a single panel mode on the monitor.

Follow these steps to pin an application to the toolbar:

1. Select the **Display settings**  button or click anywhere in the blank panel frame to open the **Display Settings** window.

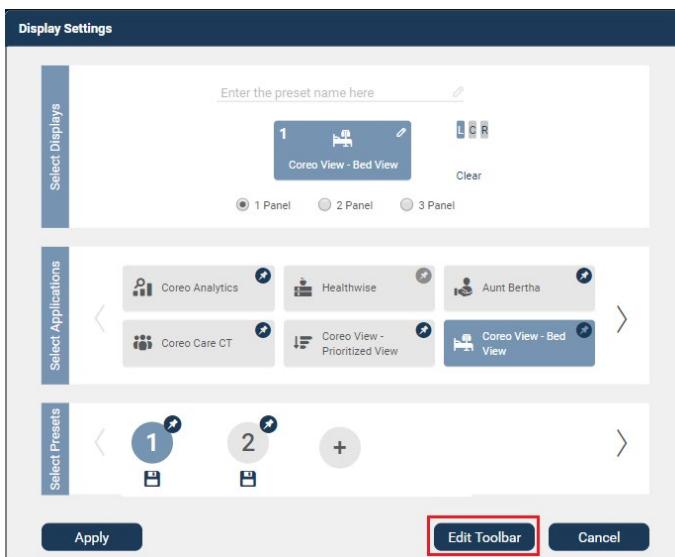


FIGURE 20. DISPLAY SETTINGS WINDOW—EDIT TOOLBAR BUTTON

2. Click the **Edit toolbar** button.

In the **Select Applications** group, each application slot has a pin icon displayed at the upper right corner of the slot-frame. The grey pin indicates that the application is not pinned to the toolbar.

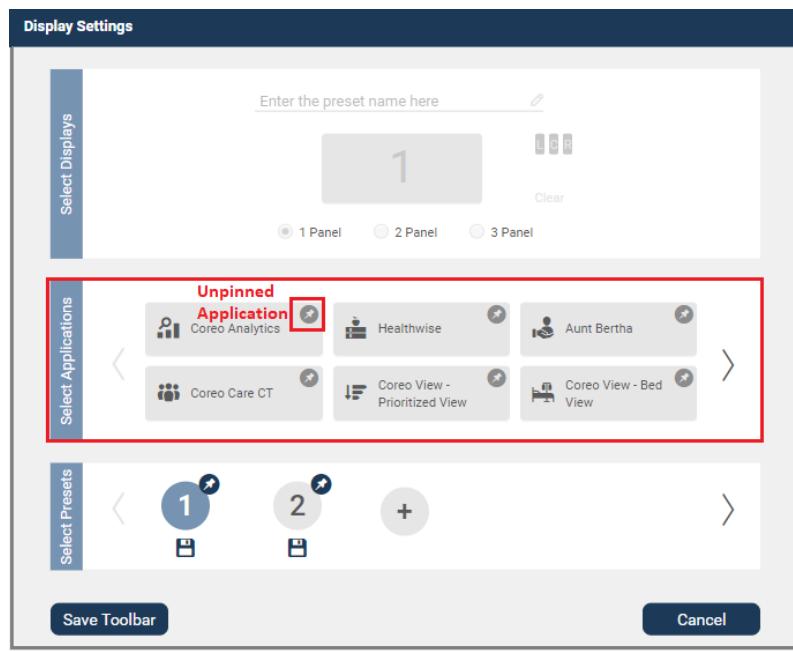


FIGURE 21. DISPLAY SETTINGS WINDOW—EDIT TOOLBAR—UNPINNED APPLICATIONS

3. Click the application slot and select the application that you want to pin to the toolbar. On selecting the application, the grey color pin changes to a blue color, indicating that the application is pinned to the toolbar.



FIGURE 22. DISPLAY SETTINGS WINDOW—EDIT TOOLBAR—PINNED APPLICATIONS

- Click the **Save Toolbar** button to save the changes that you made to the toolbar. The pinned applications display on the toolbar. When you apply an application to the screen, its icon on the toolbar highlights.

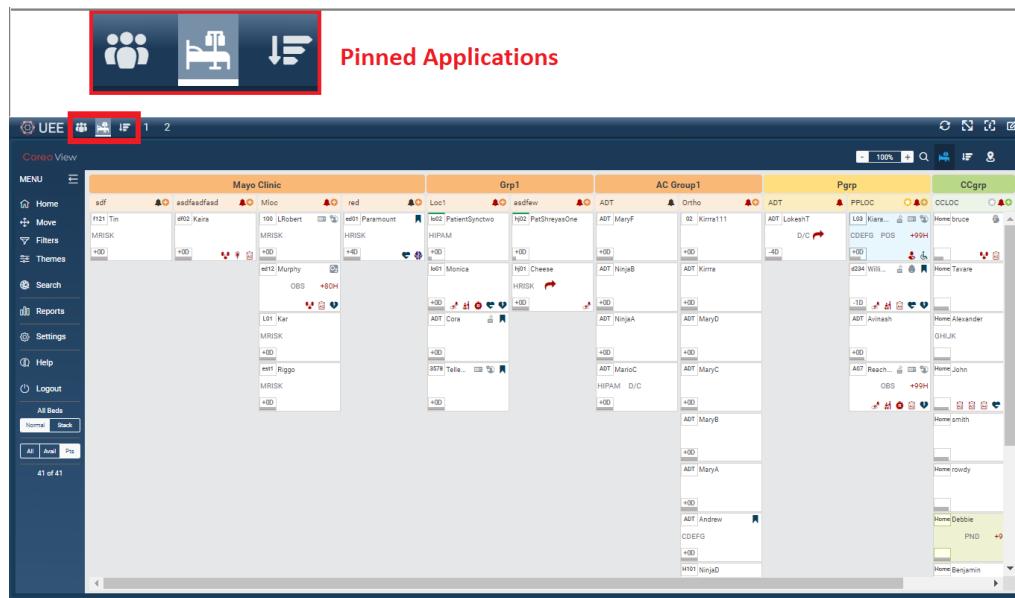


FIGURE 23. UEE SCREEN—PINNED APPLICATIONS

This pinned application displays in a single panel mode on the monitor screen.

6 Creating Presets for Multi-Panel Mode

UEE gives you the flexibility to view the applications that you have access to through a 2-panel, or a 3-panel display.

You can assign two different applications to two different panels/monitors or three applications to three panels/monitors and save these configurations as presets. The 2-panel mode and the 3-panel modes are compatible with widescreen monitors only.

Presets help you to store the most frequently used configurations for later use. You can also pin the presets to the toolbar. Pinning presets to the toolbar helps you to customize the toolbar to store and access the most frequently used presets with ease.

6.1 Configure a 2-Panel View

Follow these steps to configure a 2-panel view in the **Display Settings** window and apply it on the UEE screen of your monitor:

- Click the UEE application on the [Coreo Landing screen](#) to open the UEE screen.

2. Select the **Display settings**  button or click anywhere in the blank panel frame to open the **Display Settings** window.
3. In the **Select Displays** group, select the **2 Panel** radio button. A two-panel slot displays.

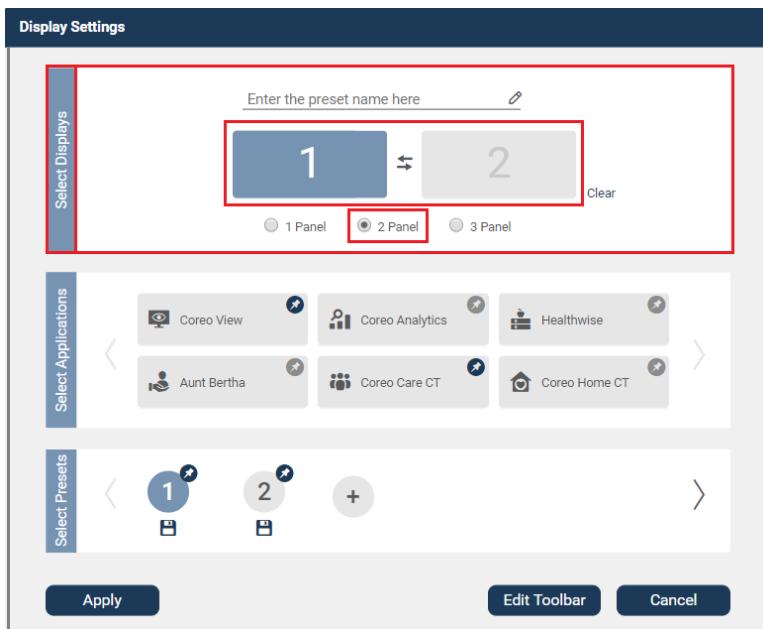


FIGURE 24. DISPLAY SETTINGS WINDOW—2 PANEL SLOT

4. Select the first panel, and in the **Select Applications** group, select the application to assign to the selected panel slot.



FIGURE 25. DISPLAY SETTINGS WINDOW—ASSIGNING APPLICATIONS TO PANEL SLOTS

5. Use the **Clear** button to clear the panel slots to reassign the applications if the panel slots have preassigned applications.
6. Select the second panel, and in the **Select Applications** group, select the application to assign to the selected panel slot.

If you choose to interchange the assigned applications between the panel slots, you can use the Swap button .

For example, if you have assigned the Coreo View application to panel 1 and Coreo Care application to panel 2 and if you click the Swap button, then the Coreo View application that was assigned to panel 1 is now assigned to panel 2 and Coreo Care application to panel 1.



UEE gives you the flexibility to select the panel slots in the order of your choice when assigning the applications; you can either select panel 1 first or panel 2 when assigning the application.

7. Click the **Apply** button to apply the 2-panel configuration to the UEE screen on your monitor.

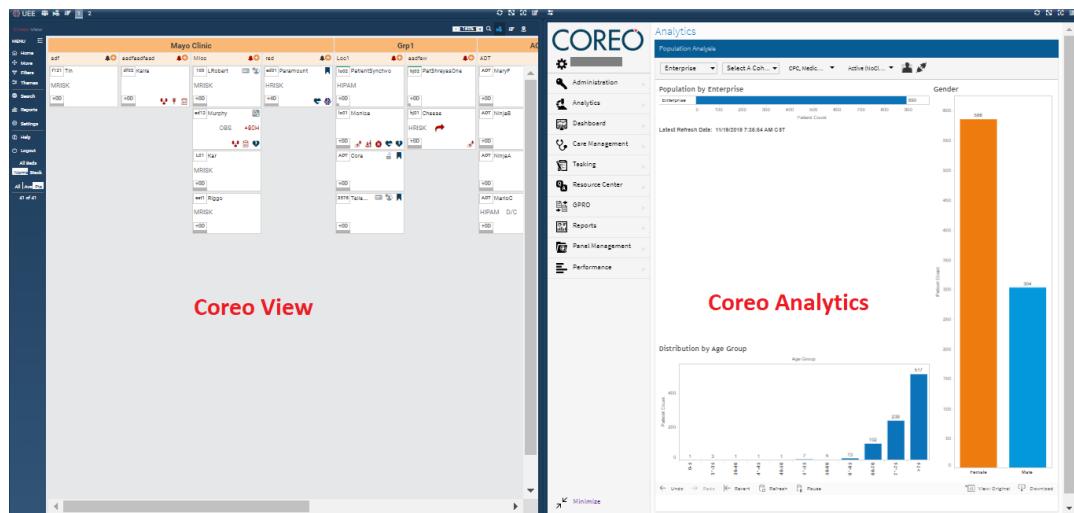


FIGURE 26. MONITOR SCREEN IN 2-PANEL MODE

6.2 Save a 2-Panel Configuration as a Preset

UEE gives the provision to save a 2-panel configuration as a preset, and the 2-panel mode is compatible with widescreen monitors only.

Follow these steps to save a 2-Panel configuration as a preset:

1. Select the **Display settings**  button or click anywhere in the blank panel frame to open the **Display Settings** window.
2. Click the Add Preset  button in the **Select Presets** group.

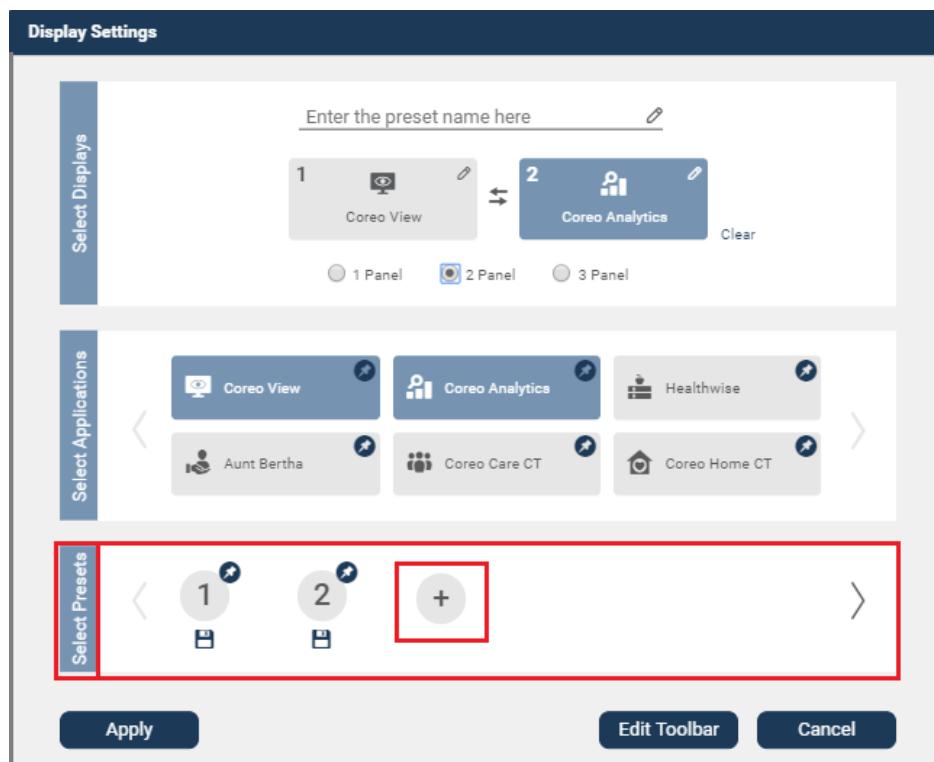


FIGURE 27. DISPLAY SETTINGS WINDOW—ADD PRESET BUTTON

A new preset icon is created with the preset number auto-generated by UEE.

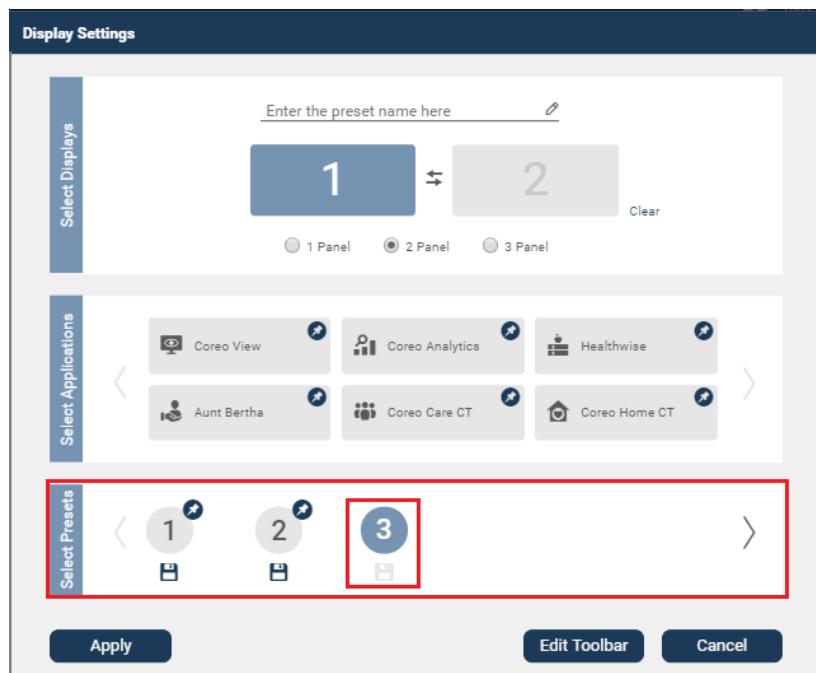


FIGURE 28. DISPLAY SETTINGS WINDOW—NEWLY ADDED PRESET

3. Select the **2 Panel** radio button in the **Select Displays** group.
4. Select the first-panel slot, and from the **Select Applications** group, select the application to assign to the selected panel.

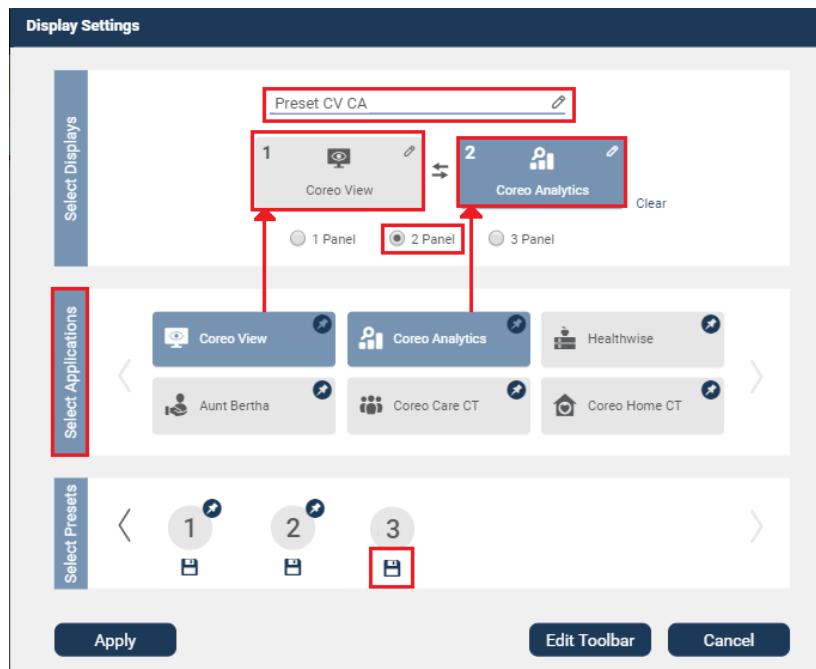


FIGURE 29. CREATING A 2-PANEL PRESET

5. Select the second-panel slot, and in the **Select Applications** group, select the application to assign to the selected panel.
6. Enter the preset name in the **Enter the preset name here** box. This preset name displays as a [tooltip](#) to the pinned preset on the toolbar. You also can enter the preset name before assigning the applications to the panel slot.
7. Click the Save button below the preset icon in the **Select Presets** group to save the 2-panel configuration as a preset.

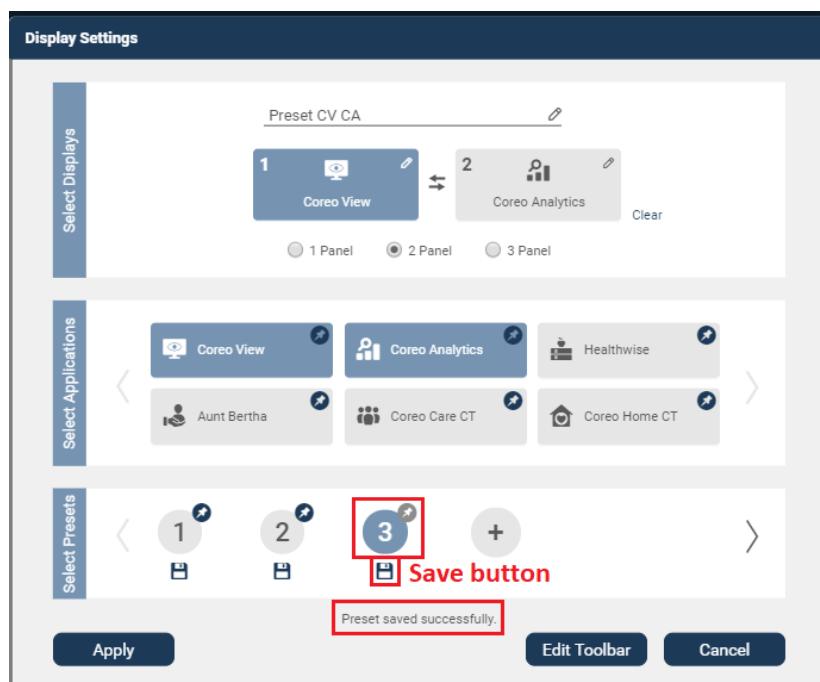


FIGURE 30. SAVING A PRESET

On saving the preset, a message, “**Preset saved successfully**” displays indicating that the preset is saved successfully. A grey pin icon displays with the saved preset, and you can [pin this preset to the toolbar](#).



When you create presets with the same configuration, that is, the same number of panels, the same applications in the same order, and with the same preset names, they are considered as identical presets, and UEE indicates this to the user by highlighting the identical preset icons.

If you try to exit the **Display Settings** window without saving the preset or without saving the changes that you may have made to an existing preset, a warning-message box displays alerting you about the unsaved changes; to save the changes that you made to the preset, select **Yes** or select **No** to discard the changes.



FIGURE 31. WARNING-MESSAGE BOX

8. Click the **Apply** button to apply the saved preset to the monitor screen immediately or click the **Cancel** button to exit the **Display Settings** window without applying the saved preset, but to use it when required.

6.3 Pin a 2-Panel Preset to the Toolbar

You can customize the toolbar by pinning the presets to it. Pinning the presets helps you to switch between presets and apply the required preset to the screen quickly.

Follow these steps to pin a 2-Panel preset to the toolbar:

1. Select the **Display settings** button or click anywhere in the blank panel frame to open the **Display Settings** window.

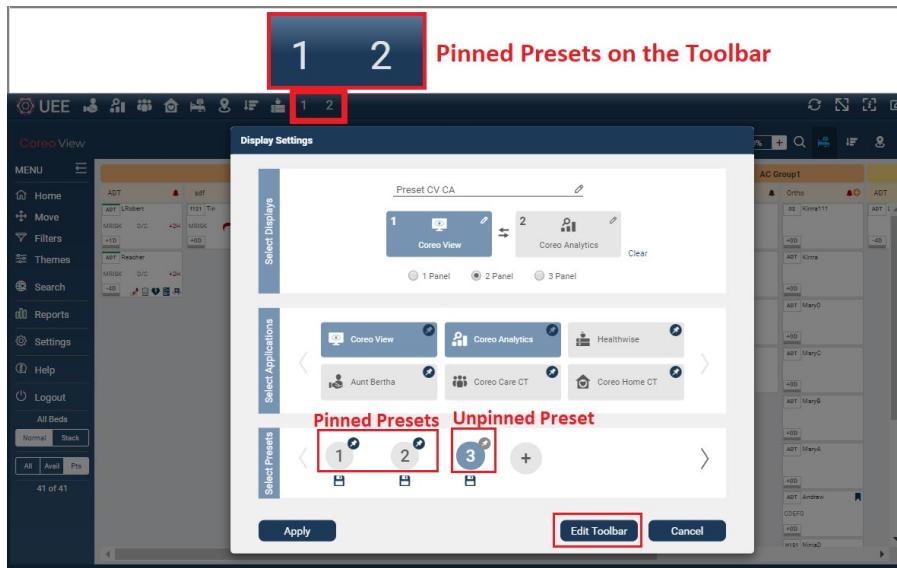


FIGURE 32. PRESETS PINNED TO THE TOOLBAR

The presets that are already pinned to the toolbar have blue colored pin icons, and the presets that are not pinned to the toolbar have grey colored pin icons.

2. Click the **Edit Toolbar** button.

3. Select the saved 2-panel preset icon to pin it to the toolbar of the UEE screen. On selecting, the preset icon displays a blue color pin indicating that the preset is pinned to the toolbar.

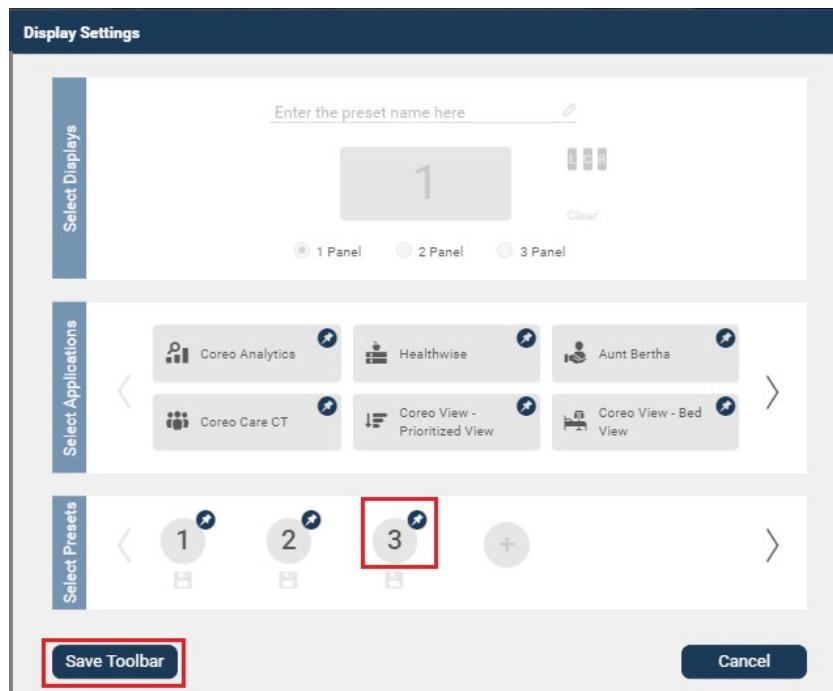


FIGURE 33. PINNING A 2-PANEL PRESET

4. Click the **Save Toolbar** button to save the changes that you made to the toolbar.

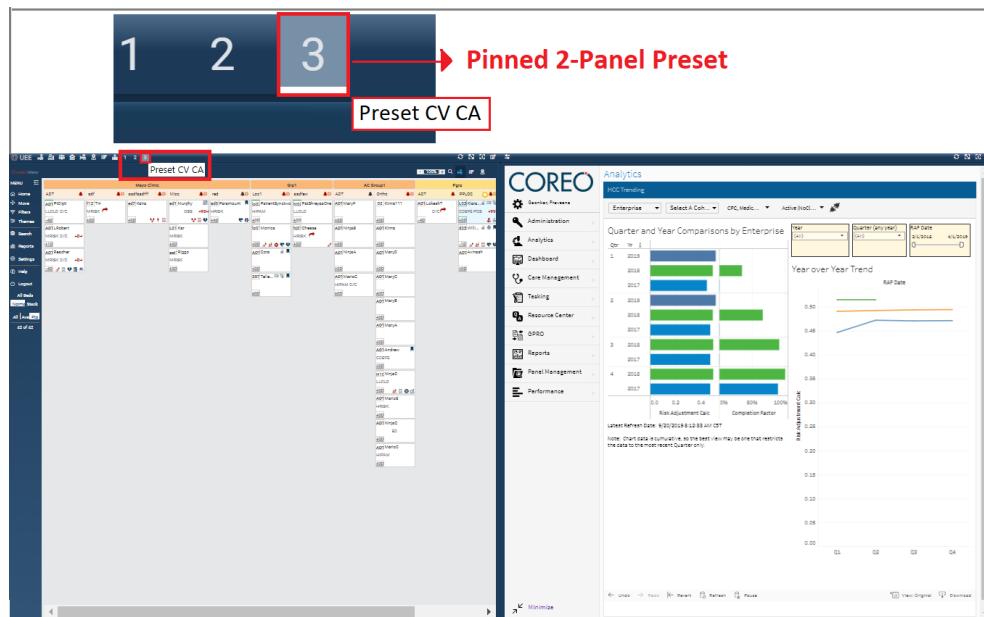


FIGURE 34. 2-PANEL PRESET PINNED TO THE TOOLBAR

The pinned preset displays on the toolbar. If the preset that you applied to the screen happens to be one of the pinned presets, then the preset icon highlights on the toolbar with a thin white bar below the preset number.

If you hover the mouse over the pinned preset icon, the [preset name that you had defined](#) in the **Display Settings** window shows as a tooltip, otherwise, UEE displays an auto-generated preset name in the format, **Preset 'Number,' for example, Preset 4.**

6.4 Configure a 3-Panel View

Follow these steps to configure a 3-Panel view in the **Display Settings** window and apply it on the UEE screen of your monitor:

1. Click the UEE application on the [Coreo Landing screen](#) to open the UEE screen.
2. Select the **Display settings**  button or click anywhere in the blank panel frame to open the **Display Settings** window.

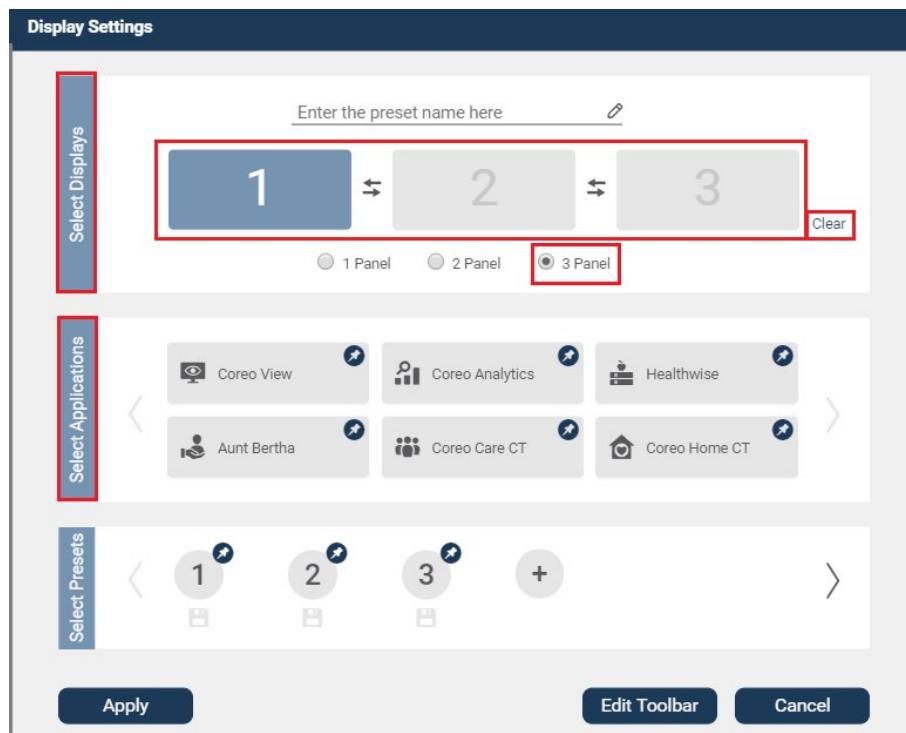


FIGURE 35. DISPLAY SETTINGS WINDOW—3-PANEL SLOT

3. In the **Select Displays** group, select the **3 Panel** radio button. A 3-panel slot displays.

You can use the **Clear** button to clear the panel slots to reassign the applications if the panel slots have preassigned applications.

4. Select the first panel, and from the **Select Applications** group, select the application to assign to the selected panel slot.
5. Similarly, select the second panel and third panel in the **Select Applications** group, and select the applications to assign to the selected panel slots.

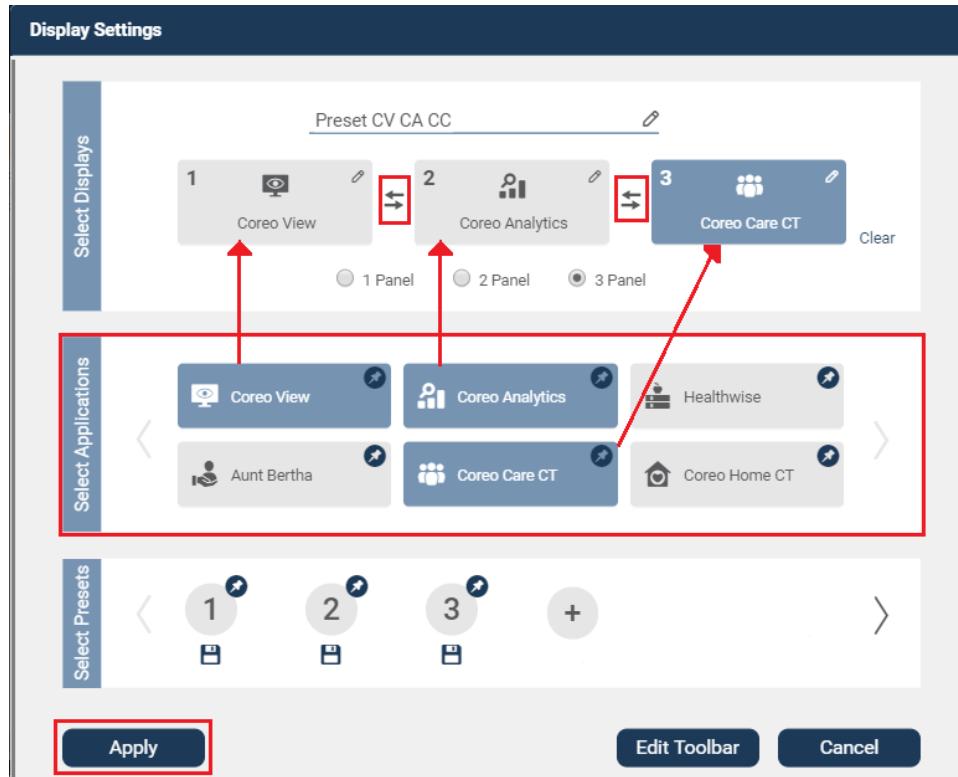


FIGURE 36. DISPLAY SETTINGS WINDOW—ASSIGNING APPLICATIONS TO PANEL SLOTS

If you choose to interchange the assigned applications between the panel slots, you can use the Swap button .

For example, if you have assigned the Coreo View application to panel 1 and Coreo Care application to panel 2 and if you click the Swap button, then the Coreo View application that was assigned to panel 1 is now assigned to panel 2 and Coreo Care application to panel 1. Similarly, you can swap the applications between panels 2 and 3.



UEE gives you the flexibility to select the panel slots in the order of your choice when assigning the applications to them; you can select panel 1, panel 2 and panel 3 in any order when assigning the applications.

6. Click the **Apply** button to apply the 3-panel preset to the UEE screen on the monitor.

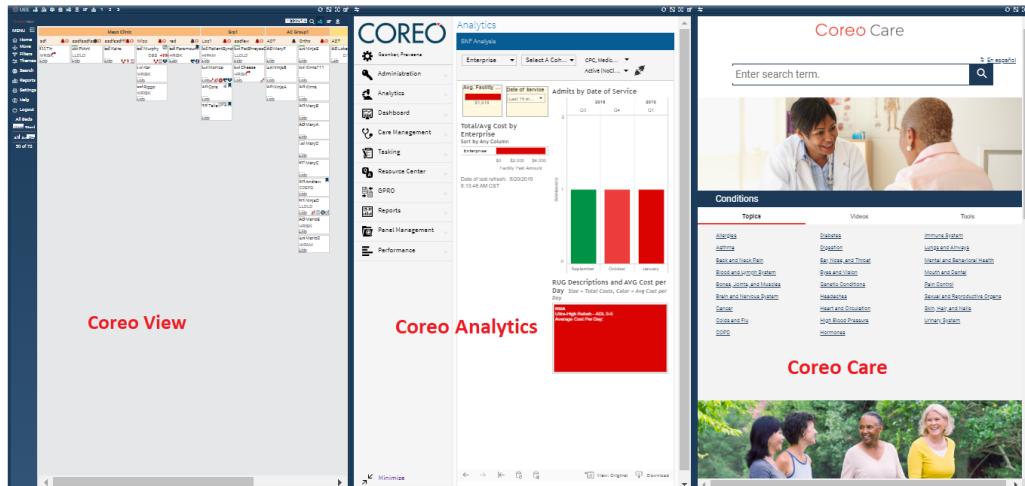


FIGURE 37. MONITOR SCREEN IN 3-PANEL MODE

6.5 Save a 3-Panel Configuration as a Preset

UEE gives the provision to save a 3-panel configuration as a preset. Saving the presets help you to store the most frequently used configurations for later use.

Follow these steps to save a 3-panel configuration as a preset:

1. Select the **Display settings** button on the toolbar or click anywhere in the blank panel frame to open the **Display Settings** window.
2. Click the Add Preset button in the **Select Presets** group.

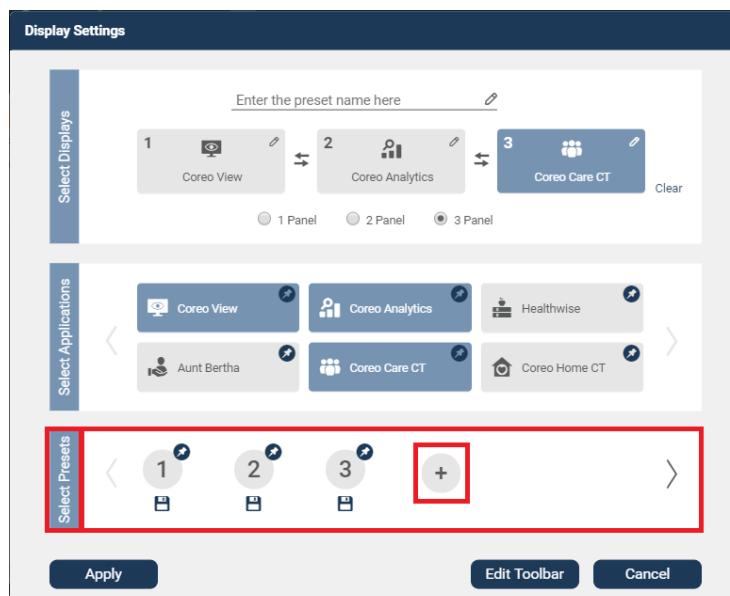


FIGURE 38. DISPLAY SETTINGS WINDOW—ADDING A PRESET

A new preset icon is created with the preset number auto-generated by UEE.

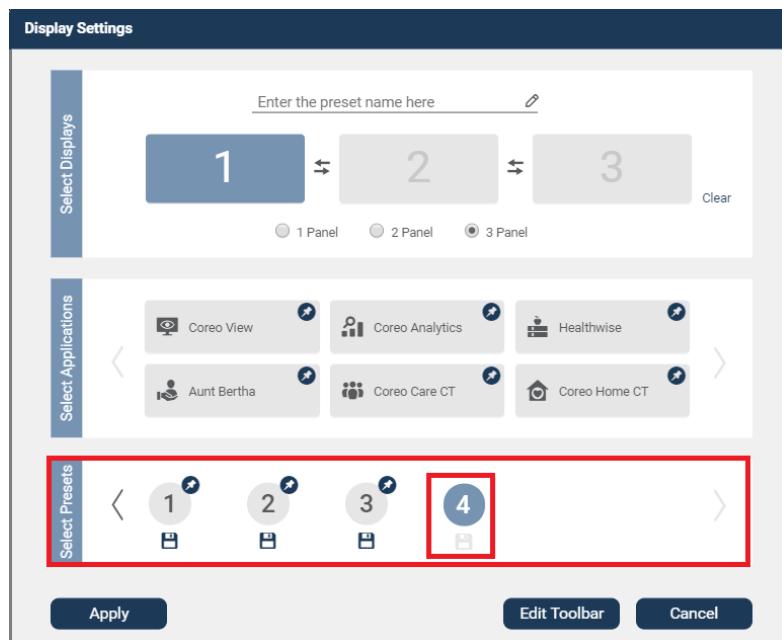


FIGURE 39. DISPLAY SETTINGS WINDOW—NEWLY ADDED PRESET

3. Select the **3 Panel** radio button in the **Select Displays** group.
4. Select the first-panel slot, and from the **Select Applications** group, select the application to assign to the selected panel.

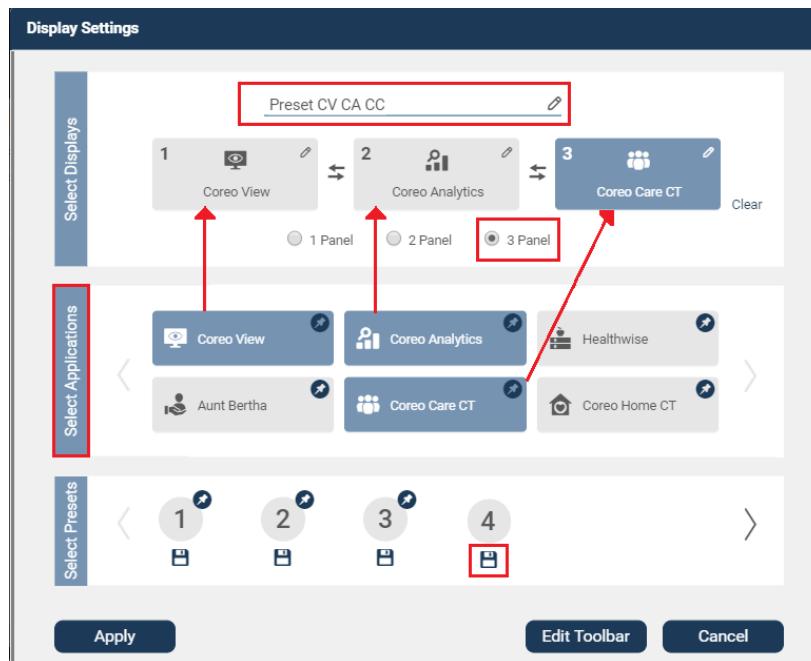


FIGURE 40. CREATING A 3-PANEL PRESET

5. Select the second-panel slot, and from the **Select Applications** group, select the application to assign to the selected panel.
6. Similarly, select the third-panel slot and assign the application.
7. Enter the preset name in the **Enter the preset name here** box. This preset name displays as a tooltip to the pinned preset on the toolbar. You can also enter the preset name before assigning the applications to the panel slot.
8. Click the Save button  below the preset icon in the **Select Presets** group to save the 3-panel configuration as a preset.

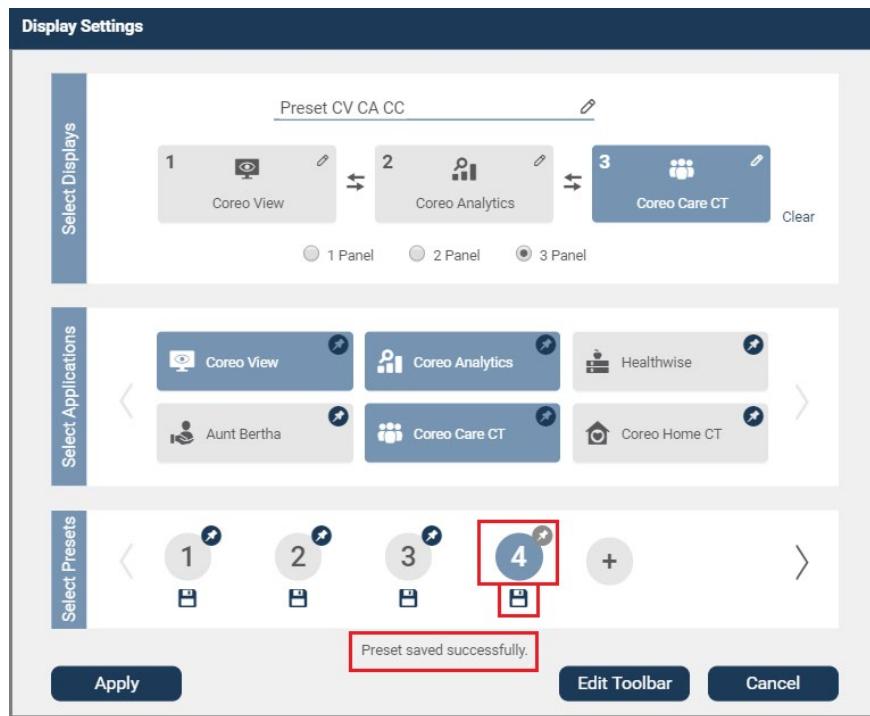


FIGURE 41. SAVING A PRESET

9. On saving the preset, a message, '**Preset saved successfully**' displays indicating that the preset is saved successfully. A grey pin icon displays with the saved preset, and you can [pin this preset to the toolbar](#).
10. Click the **Apply** button to apply the saved preset to the monitor screen immediately or click the **Cancel** button to exit the **Display Settings** window without applying the saved preset, but to use it when required.
11. Similarly, you can create more presets and save them for the next use.

6.6 Pin a 3-Panel Preset to the Toolbar

Follow these steps to pin a 3-Panel preset to the toolbar:

1. Select the **Display settings**  button on the toolbar or click anywhere in the blank panel frame to open the **Display Settings** window.
2. Click the **Edit Toolbar** button.
3. Select the 3-panel preset that you saved to pin it to the toolbar of the UEE screen.
On selecting the preset icon, the grey colored pin changes to a blue color, indicating that the preset is pinned to the toolbar.

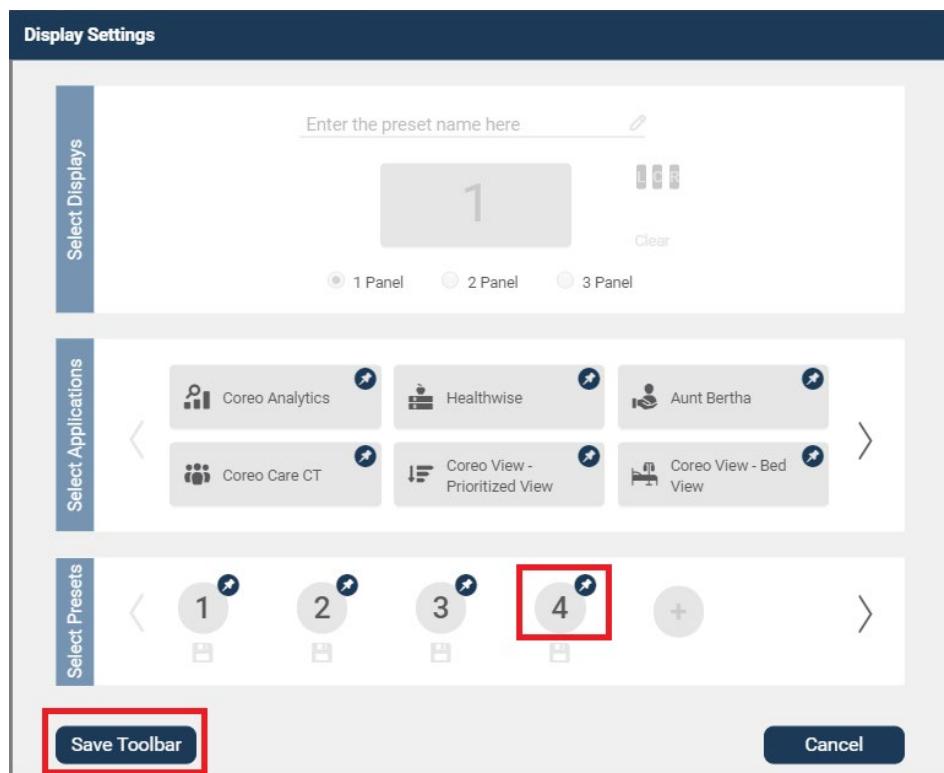


FIGURE 42. PINNING A 3-PANEL PRESET

4. Click the **Save Toolbar** button to save the changes that you made to the toolbar.

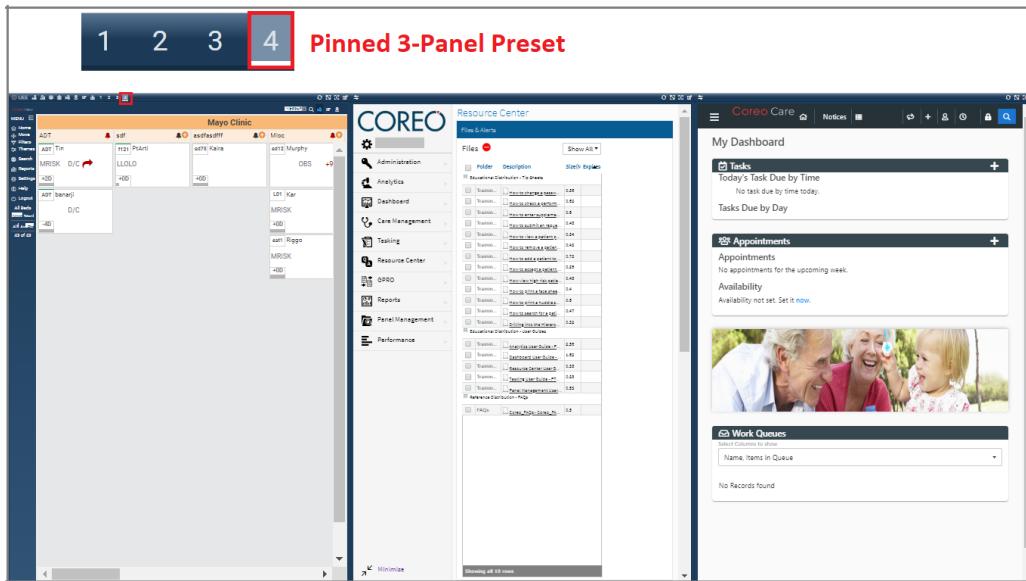


FIGURE 43. PRESET PINNED TO THE TOOLBAR AND HIGHLIGHTED

The newly pinned preset displays on the toolbar.

6.7 Screens for Optimal Display of Pinned Applications and Presets

You can view a maximum of 20 pinned applications and presets for a single panel display on standard screen monitors, beyond which you can use a chevron icon to navigate the screen and access the remaining pinned icons.

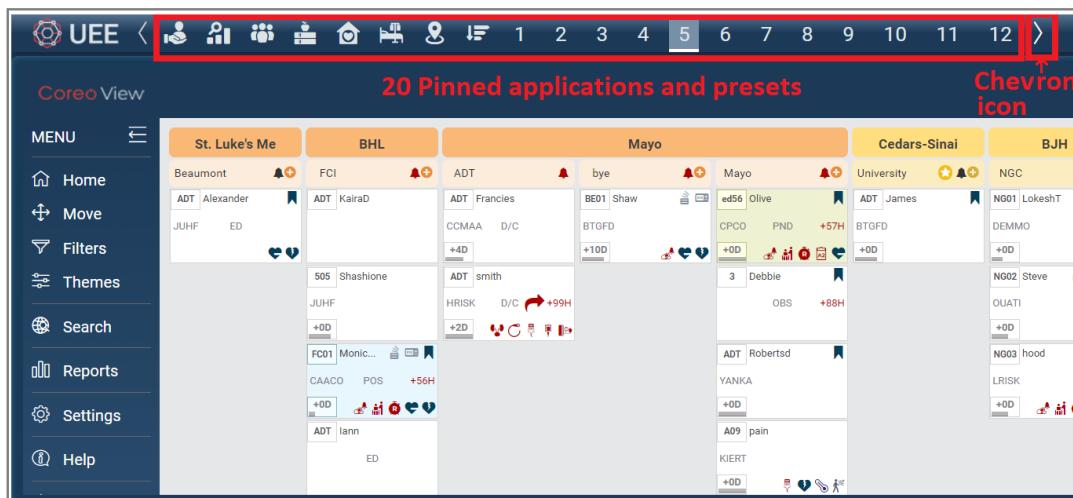


FIGURE 44. 20 PINNED APPLICATIONS AND PRESETS – STANDARD SCREEN- SINGLE PANEL MODE

On widescreen monitors, for a single panel display, you can view a maximum of 33 pinned applications and presets, beyond which the user can use a chevron icon to navigate to the rest of the screen and access the remaining pinned icons.

For a 2-panel view and a 3-panel view, a maximum of 20 pinned applications and presets can be viewed both on standard screen monitors and on widescreen monitors.

The following table gives details about the number of pinned applications and presets that display for different panel modes for each screen type:

Screen Type / Monitor	Panel Mode	Total No. of Pinned Applications and Presets on a single display
Standard Screen	Single panel	20
Widescreen	Single panel	33
Standard Screen	2-panel	20
Widescreen	2-panel	20
Standard Screen	3-panel	20
Widescreen	3-panel	20

Table 5. DETAILS ABOUT PINNED APPLICATIONS AND PINNED PRESETS

6.8 Editing an Existing Preset

UEE allows the user to modify an existing preset. Editing a preset includes the following:

- Change the applications that are assigned to the panel slots.
- Change from a 2-panel preset to a 3-panel preset and from a 3-panel to a 2-panel preset.
- Swap the applications between the panel slots to change the order in which the applications must display in a 2-panel or 3-panel view on the monitor.

The Swap button in the **Display Settings** window functions, as shown in the following illustration:

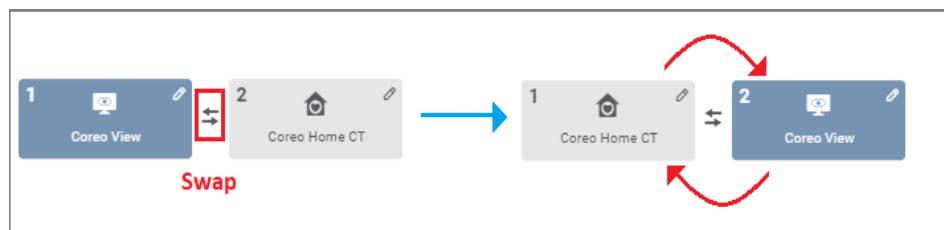


FIGURE 45. SWAP FUNCTION IN THE DISPLAY SETTINGS BUTTON

You can use the Swap button to interchange the applications between panels 1 and 2 slots and between panels 2 and 3 slots in the **Display Settings** window.

Follow these steps to make changes to an existing preset:

1. Select the **Display settings**  button on the toolbar or click anywhere in the blank panel frame to open the **Display Settings** window.

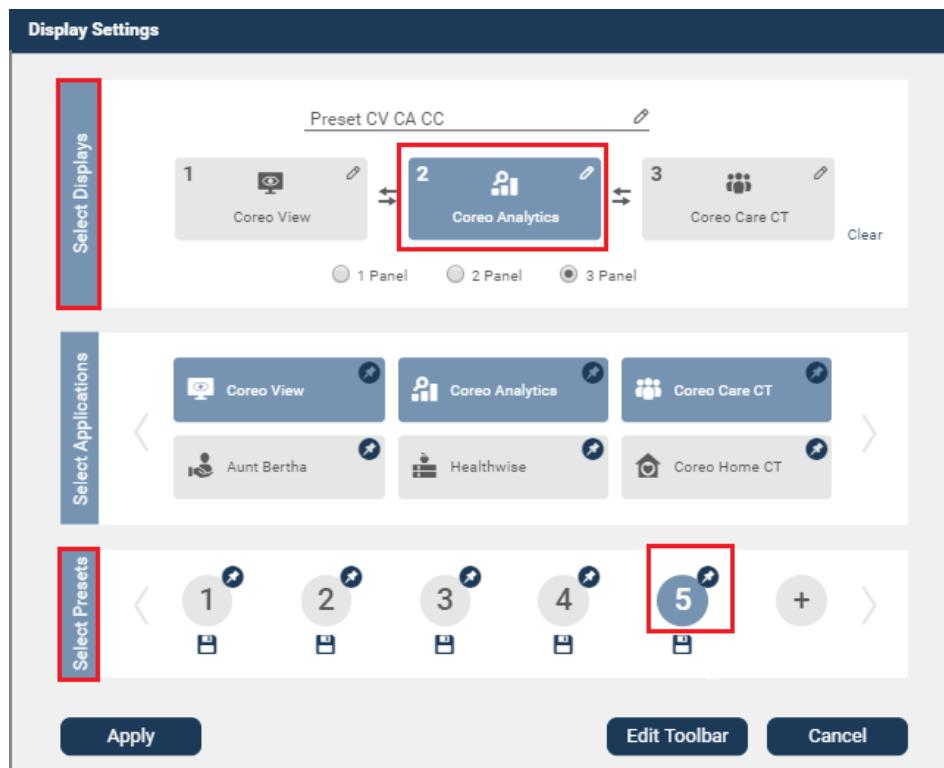


FIGURE 46. SELECT AN EXISTING PRESET

2. Select an existing 2-panel or a 3-panel preset that you want to edit from the **Select Presets** group.
3. Select the panel slot for which you want to assign a new application from the **Select Displays** group.

You can either change the applications in all the preset slots (two preset slots and three preset slots) or just one slot.



Use the Clear button to clear the applications of all the panel slots at a time.

4. Use the Swap button to only interchange the applications between the panel slots without assigning new applications.

5. From the **Select Applications** group, click the new application that you want to assign to the panel. The new application is assigned to the selected panel slot.
6. If required, you can change the preset name in the **Enter the preset name here** box.

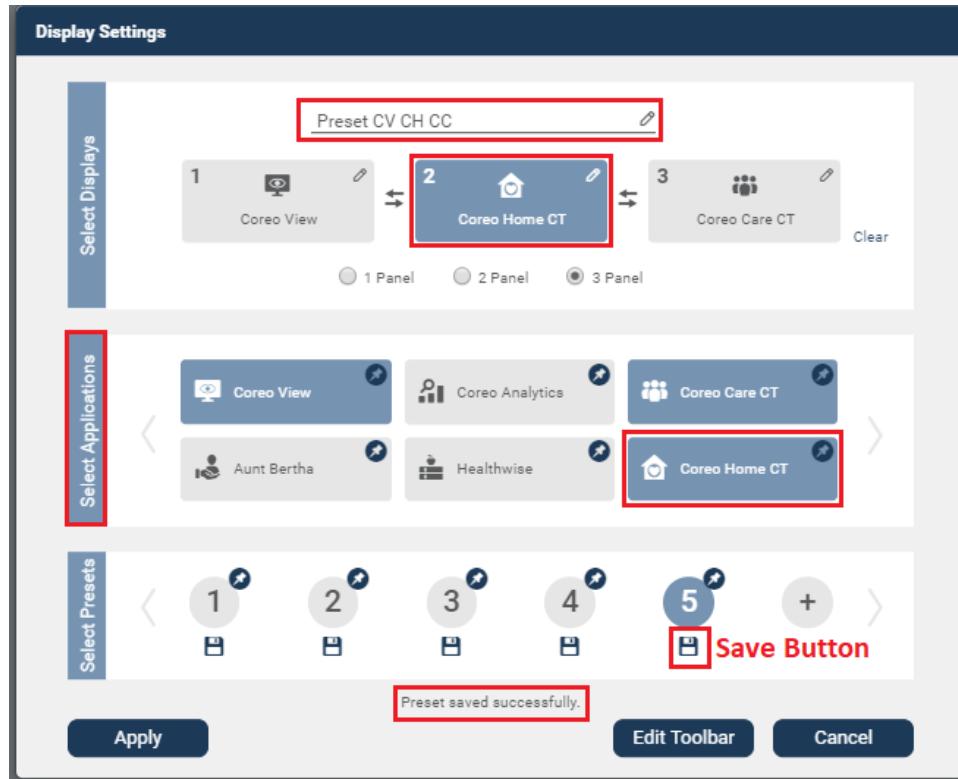


FIGURE 47. EDIT AN EXISTING PRESET

7. Click the **Save** button below the preset icon that you want to edit. The changes that you made to the preset are saved. The message, '**Preset saved successfully**' displays on successfully saving the preset.
8. Click the **Apply** button to apply the saved preset to the monitor screen immediately or click the **Cancel** button to exit the **Display Settings** window without applying the saved preset, but to use it when required.

6.9 Switch between Single-Panel Mode and Multi-Panel Mode

UEE gives the provision to view the applications that you have access to through a single panel, 2-panel, or a 3-panel display.

Use the pinned applications on the toolbar to apply one of the applications of your choice in a single panel mode.

Use the pinned presets on the toolbar to apply a 2-panel view or a 3-panel view on your monitor screen.

You can choose to switch the view on the monitor screen from a single panel mode to a multi-panel mode (2-panel or 3-panel views). You can do this directly from the toolbar on the UEE screen, or the **Display Settings** window and then apply the changes on the UEE screen:

Follow these steps to change the UEE screen view from a single panel mode to a multi-panel mode from the toolbar of the UEE screen:

1. If you are not on the UEE screen already, click the UEE application on the [Coreo Landing screen](#) to open the UEE screen.



When you open the UEE screen, the application or the preset that you last applied to the UEE screen in your previous login session displays.

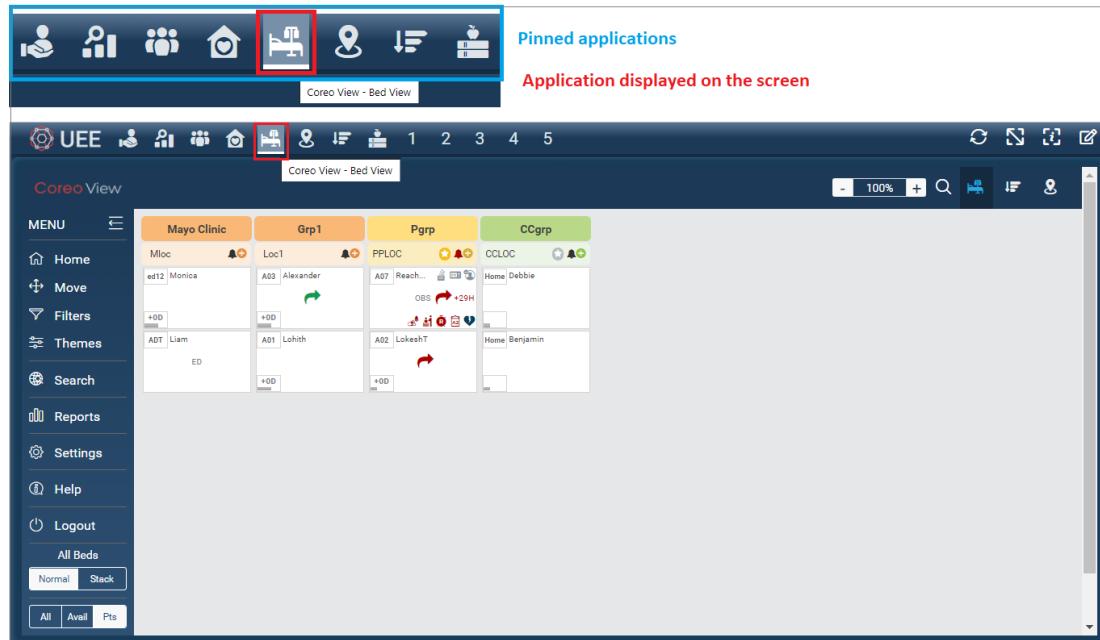


FIGURE 48. UEE SCREEN—SINGLE PANEL MODE—COREO VIEW-BED VIEW

2. Click preset **1** on the toolbar, which is a 2-panel preset, to apply to the UEE screen on your monitor.

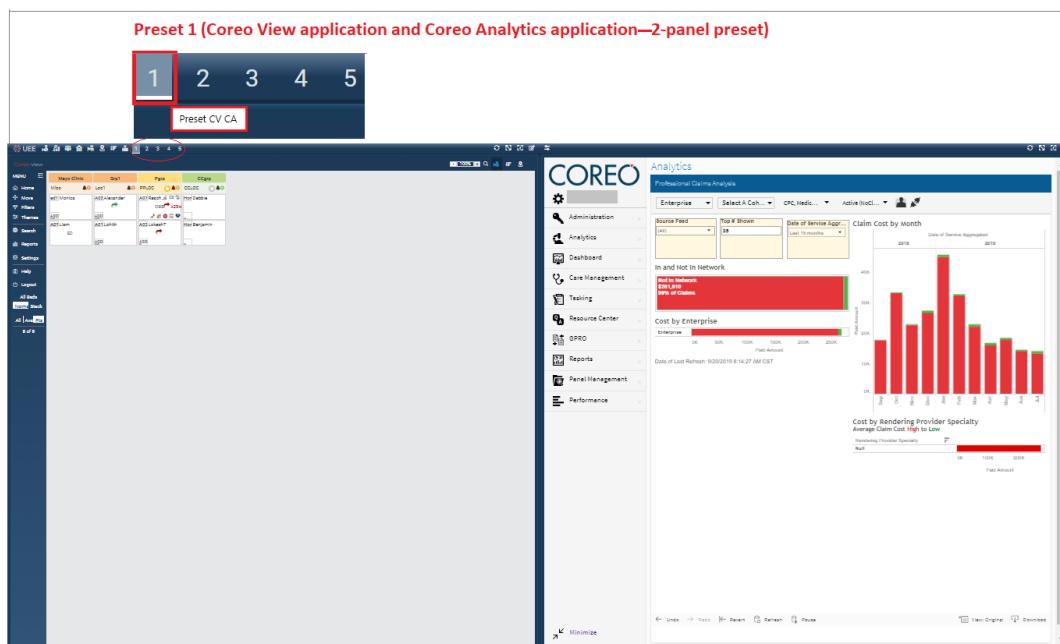


FIGURE 49. UEE SCREEN—SWITCHED TO A 2-PANEL MODE

You can click the **Coreo View-Bed View** application icon to switch back to the single-panel view, or any pinned applications on the toolbar to revert to the single panel mode.

3. Similarly, click preset **2** on the toolbar, which is a 3-panel preset, to apply to the UEE screen on the monitor.

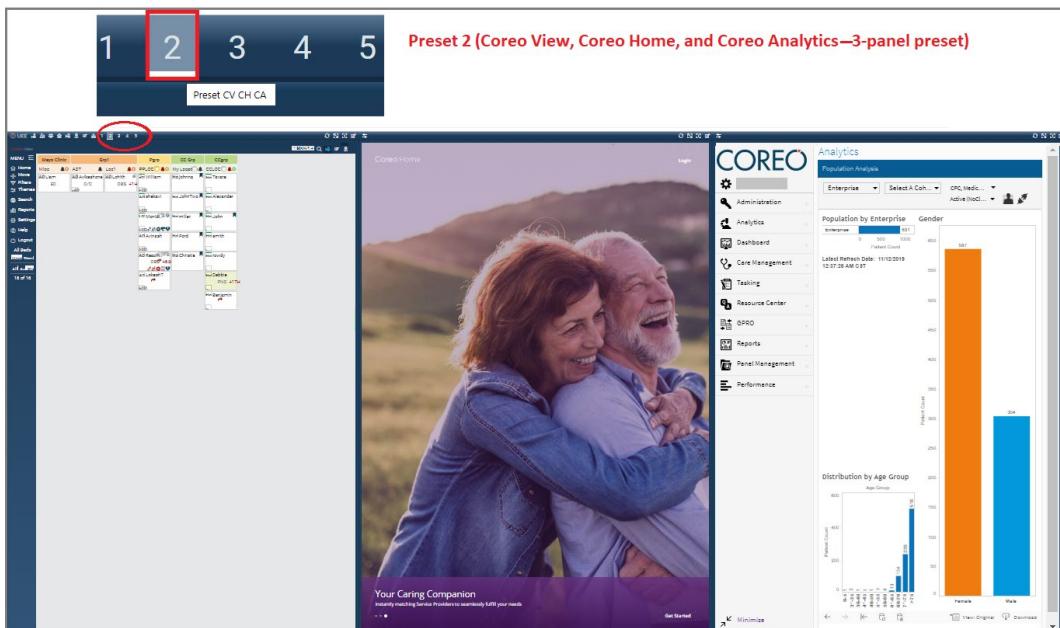


FIGURE 50. UEE SCREEN—SWITCHED TO A 2-PANEL MODE

4. Click the **Swap** button on the toolbar that is located in the upper-left corner of the second panel to interchange the applications between the first panel and the second panel on the UEE screen of your monitor.

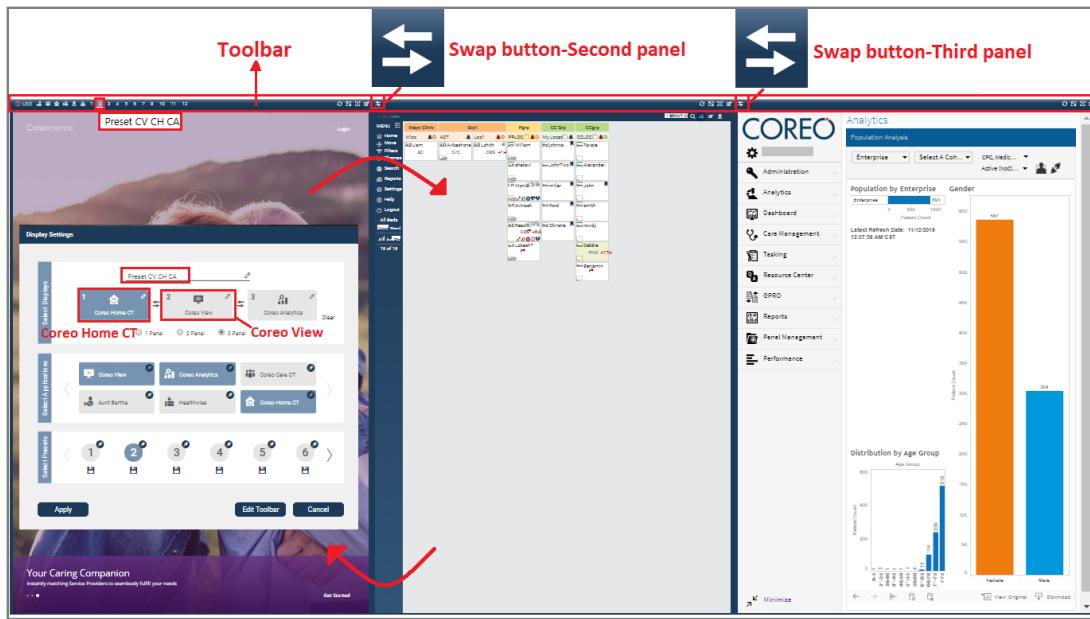


FIGURE 51. SWAPPING APPLICATIONS BETWEEN PANELS

Similarly, you can use the **Swap** button of the third panel to interchange the applications between the second panel and the third panel.



When you swap the applications of a saved preset on the UEE screen, UEE saves the changes in the Display Settings window as well.

You can click any pinned applications, or any pinned presets on the toolbar to apply it to UEE screen, thereby you can switch between different applications within a single-panel view, or switch from a single-panel view to 2-panel view, and from a single-panel view to a 3-panel view.

Refer to the below table to view the various combinations in which you can switch between panels:

Panel Mode		Panel Mode
Single panel view (Using pinned application) <i>Example:</i> Coreo Analytics 		Single panel view (Using pinned application) <i>Coreo Care</i> 
Single panel view <i>Example:</i> Coreo Analytics 		2-panel view (Using pinned preset) <i>Preset: Coreo View and Coreo Care</i>
Single panel view <i>Example:</i> Coreo View – Prioritized View 	 Switch	3-panel view (Using pinned preset) <i>Preset: Coreo View, Coreo Home, and Coreo Care</i>
2-panel view <i>For example, Preset: Coreo View and Coreo Analytics</i>		2-panel view <i>Preset: Coreo Care and Coreo Healthwise</i>
2-panel view <i>Preset: Coreo Home and Coreo Healthwise</i>		3-panel view <i>Preset: Coreo Analytics, Coreo Home, and Coreo Care</i>
3-panel view <i>Preset: Coreo Healthwise, Coreo Home, and Coreo Care</i>		3-panel view <i>Preset: Coreo View, Coreo Analytics, and Coreo Care</i>

Table 6. PANEL COMBINATIONS TO SWITCH BETWEEN VIEWS

7 Screen Displays in Maximized View

Coreo UEE gives you the convenience to maximize the UEE screen view in a single-monitor display and multiple-monitor displays.

The Coreo UEE application is compatible with a multiple monitor setup (2-monitors or 3-monitors). In multiple displays, you can view single or multiple applications configured in the panels of the UEE screen on two or three different monitors simultaneously without having to shift between different applications on a single monitor continually.

7.1 Maximize View in Single Display

Use the **Maximize Display** button to view the panel-display in the full-screen mode.

Follow these steps to view in the full-screen mode:

1. If you are not on the UEE screen already, click the UEE application on the [Coreo Landing screen](#) to open the UEE screen. The default view of the UEE screen on the browser page is the normal mode in which you can view the address bar.

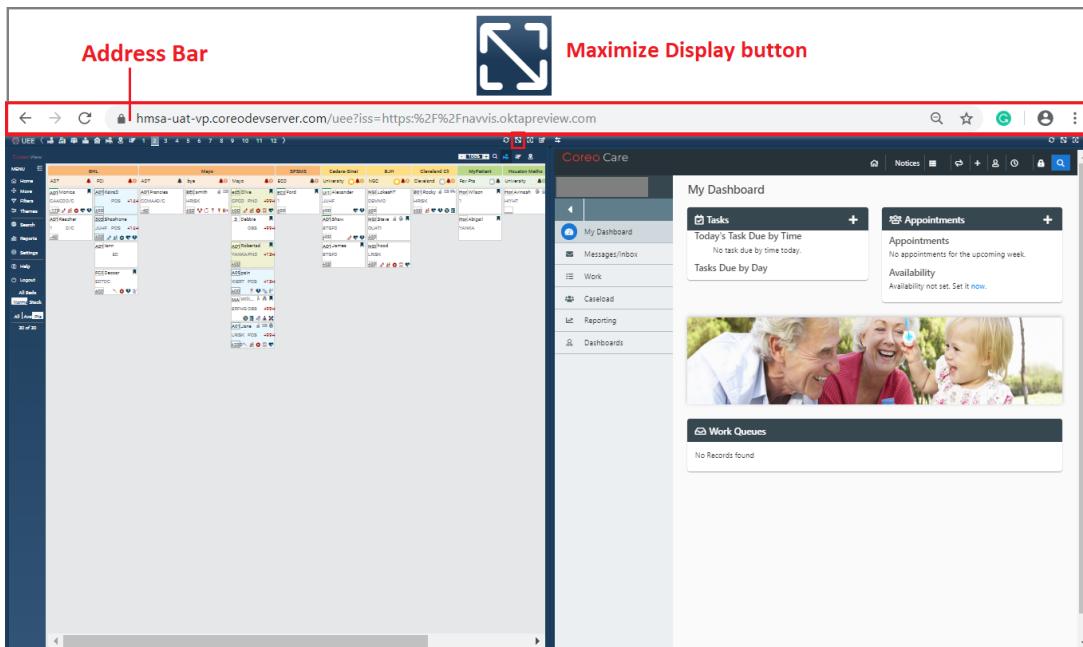


FIGURE 52. UEE SCREEN IN NORMAL MODE

2. Select the **Maximize Display** button on the toolbar to view it in the full-screen mode. You can also use the **F11** key on the keyboard to view the screen in a full-screen mode. The **Maximize Display** button is available for each panel and is located in the upper-right corner of the panel on the toolbar.

In the full-screen mode, the applications display in the entire area of the screen.

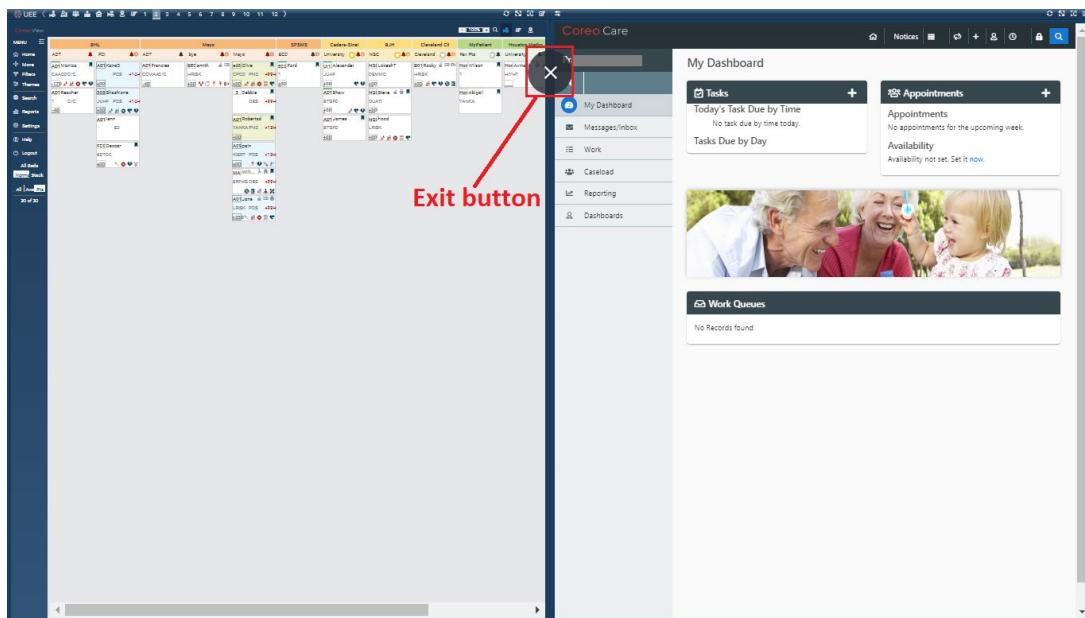


FIGURE 53. UEE SCREEN IN FULL-SCREEN MODE

3. Click the **Exit button** or click the **ESC** key on your keyboard to revert to the normal screen mode. You can also toggle the **Maximize Display** button or the **F11** key to revert to the normal screen mode.

7.2 Maximize View in Multiple Displays

You can stretch the borders of the UEE screen on the browser page along the length of the other two monitor screens to view the UEE screen in multiple displays.

Follow these steps to maximize the view for multiple displays:

1. If you are not on the UEE screen already, click the UEE application on the [Coreo Landing screen](#) to open the UEE screen in the browser on the first monitor.

The browser in the maximized mode covers the entire screen of the monitor. Click the **Restore Down** button in the upper-right corner of the browser page to view its borders.

2. Move the cursor over the border of the browser page until the cursor changes to a double-headed arrow.

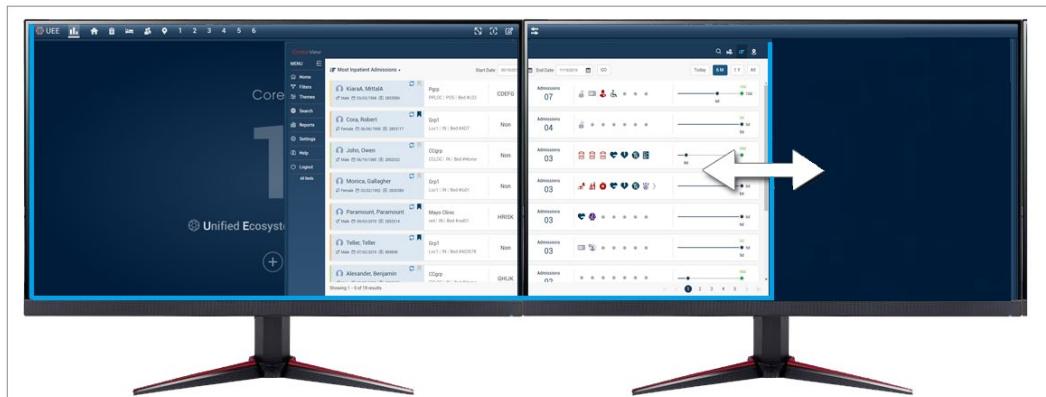


FIGURE 54. REPRESENTATION OF MULTIPLE DISPLAYS

3. Select the border and drag it across the second and (or) third monitor screens until the panels fit the monitor screens.



The panels in the UEE screen fit a monitor screen appropriately only if all the connected monitor screens have the same screen resolutions.

The Coreo View-Bed View layout and the Coreo View Geomap View layout when in a single panel stretch along the entire width of the screen on single and multiple monitors.

8 Glossary

Configuration: An arrangement in which the user can assign individual applications to different panels; The arrangement depends on the name of the application (such as Coreo View and Coreo Analytics), the number of panels (2-panels or 3-panels), and the order in which you assign them in the Display Settings window.

Coreo UEE: A Coreo ecosystem application that helps the users to view those applications in a single panel/monitor or in two panels/monitors or three panels/monitors that are accessible through the Okta single sign-on account.

Multi-panel mode: The monitor screen displaying the application(s) in two panels or three panels

Multi-panel mode: The monitor screen displaying two different applications in two panels or three different applications in three panels, even with the flexibility of leaving one or two blank panels

Panel: A standard screen monitor or a widescreen monitor. The terms ‘panel’ and ‘monitor’ are used interchangeably in a specific context when the panel displays on the monitor screen.

Single-panel mode: The monitor screen displaying the application in one panel. The terms ‘panel mode’ and ‘panel view’ are used interchangeably in this guide

User: The person who uses the Coreo UEE application

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