

Real Life

Life Changing

Changing Healthcare

User Guide

November 2019



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Real Life

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Changing Healthcare

User Guide

December 2019



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NAVVIS Unified Ecosystem Experience (UEE) user guide release 1.00.

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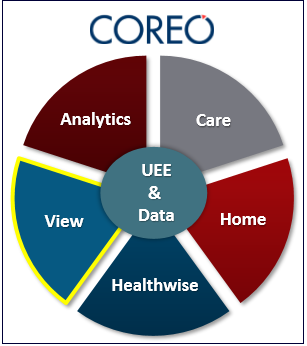
# Preface

Welcome to the release of the NAVVIS Unified Ecosystem Experience user guide.

## About Navvis Coreo Unified Ecosystem Experience

Navvis Coreo UEE application supports the display of other Coreo ecosystem applications including Coreo View, Coreo Home, and Coreo Analytics in a single-panel view for standard screens and widescreens, and in multiple-panel view for widescreens.

The Coreo ecosystem includes the following applications as illustrated below:



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

Navvis & Company 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 primary source of information about Navvis Unified Ecosystem Experience. It contains overviews, processes, and procedure to use the Unified Ecosystem Experience application effectively.

## Intended audience

1. The regular users of the Unified Ecosystem Experience application who 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 or entity involved in the care of the patient including patient's care providers, patient's insurer or payer, or a social worker, or government agencies.

1. Unified Ecosystem Experience administrator users who are assigned the task of managing the regular users of the Unified Ecosystem Experience application

## Organization of the document

This document contains the following modules:

* Module 1, “User onboarding”
* Module 2, “UEE panel view—Screen layout and navigation”
* Module 3, “Display settings for UEE panel view”
* Module 4, “Creating presets for single panel format”
* Module 5, “Creating presets for multi-panel format”
* Module 6, “Editing the toolbar”
* Module 7, “Panel formats and screen resolutions”
* Module 8, “Synchronizing patient records”

## Document Conventions

This document uses the following conventions:

| Convention | Item |
| --- | --- |
| **boldface** font | **Menu** items, **Tab** names, **Text** **box** names, **List** **box** names, **Button** names and **Navigation** paths |
| Text in blue | Hyperlinks |
|  | Note: Notes contain helpful suggestions. A note will inform 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 will help the user solve a problem faster, or to perform an action in a different way. |
|  | Caution alerts the reader to avoid doing something that could result in loss of data or any other damage. |

## Browsers Versions for UEE

The Unified Ecosystem Experience application is available on desktops, laptops, and IOS devices for standard screens and widescreens.

| Browser | Version |
| --- | --- |
| Google Chrome | 74 |
| MS Internet Explorer | 11 |
| MacBook - Safari | 12 |

Unified Ecosystem Experience-User Function



# User onboarding

A first-time user of Unified Ecosystem Experience (UEE) receives an automated email verification link from the Okta system administrator to activate the Okta account. Okta Single Sign-On(SSO) provides a single secure home page to use the UEE application.

## Log into UEE—first time user

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

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



1. Email Notification
2. Select the ActivateAccLinkGreenBox.png link. The **Create your Navvis account** screen opens.



1. Create Your Navvis Account Screen
2. Enter the new password in **Enter new password**. The password must be at least 8 characters long and a maximum of 25 characters.

The password 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 | ~ ! @ # $ % ^ & \* \_ - + = ` | \ () {} [] : ; " ' < > , . ? / |

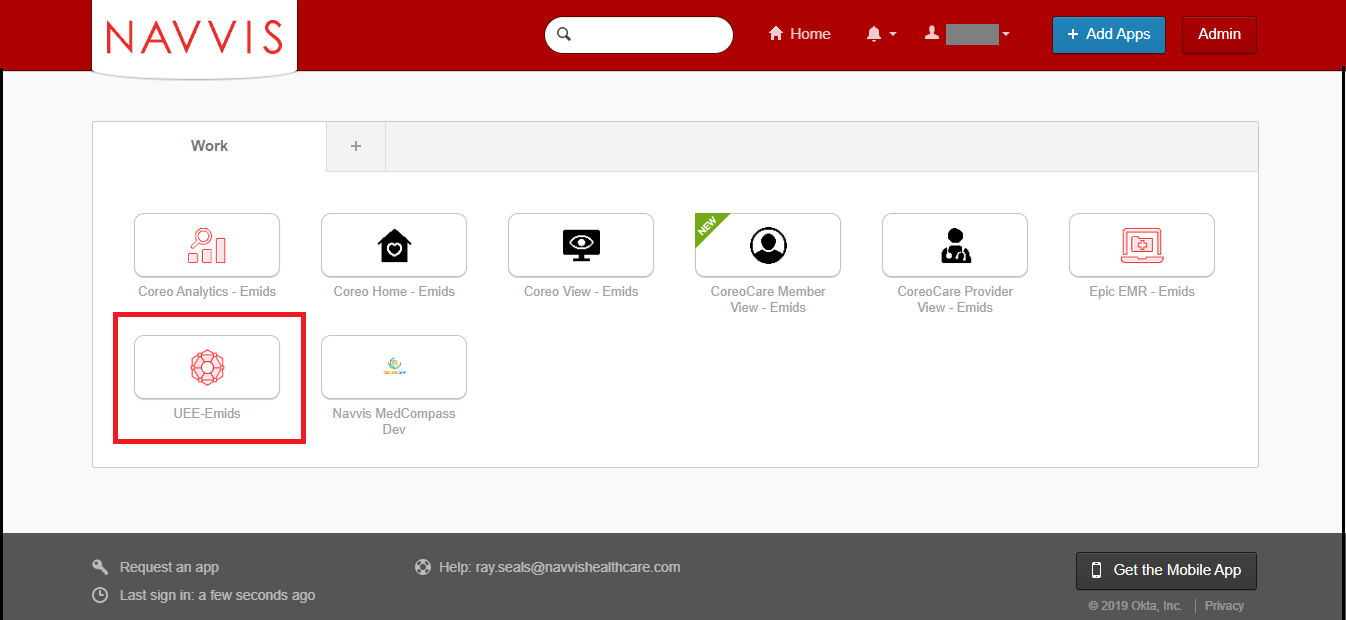
1. System Accepted Password Characters
2. Reenter the password in the **Repeat new password** box.
3. The user must add a security question to reset a new password in the scenario where user may forget the password during the future use.
4. Under **Choose a forgot password** question, select the arrow to view the questions.



1. Choose A Forgot Password Question
2. Choose a security question from the list.
3. 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.
4. Choose a picture as a security image in the **Create your Navvis account** screen and then select **Create My Account**.

|  |  |
| --- | --- |
|  | The security image displays in the [NAVVIS Sign In screen](#NAVVISsignInScreen) on entering the user name. |

1. The **Navvis** landing screen opens.

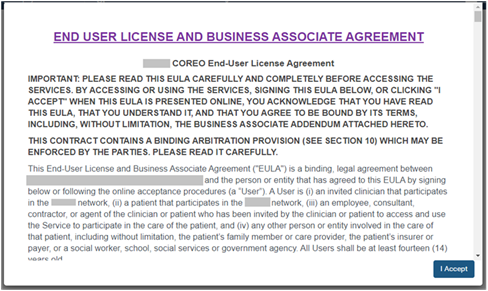


1. NAVVIS Landing Screen
2. Select the **UEE - Emids** button on the landing screen. The Coreo applications that you see on the Navvis landing screen depends upon the user role and permissions assigned to you by your NAVVIS system administrator.
3. The **NAVVIS Sign in** screen opens.

|  |  |
| --- | --- |
|  | Once the user accepts EULA and the Navvis-Okta SSO account is activated, the new user becomes an existing user.  As an existing user, go to [navvis.oktapreview.com](https://navvis.oktapreview.com/) to open the NAVVIS Sign in screen. |



1. NAVVIS Sign In Screen
2. Enter the user ID in the **Username** box.
3. Enter the password in the **Password** box. The [password](#PasswordCharacters) must be at least 8 characters long and a maximum of 25 characters.
4. Select **Sign In**.
5. 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.



1. EULA PAGE
2. Read the terms and conditions and select the **I Accept** button. Your NAVVIS account is activated successfully and the UEE home page opens.

## About locked Navvis-Okta SSO account

The Navvis-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 Okta system administrator.

|  |  |
| --- | --- |
|  | To unlock the NAVVIS account immediately after the five failed login attempts, contact the Okta system administrator. |

* The Okta system administrator can lock the NAVVIS-Okta SSO account as per the company lock account policy.

## Reset a forgotten or expired password

The Okta Single Sign-On 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, Navvis-Okta gives the option to reset the password.

Follow these steps to reset the password:

1. Go to [navvis.oktapreview.com](https://navvis.oktapreview.com/) to open the **Navvis Sign in** screen.



1. NAVVIS Sign In Screen - Forgot password? Option
2. Select the **Need help signing in?** drop-down list.
3. Select the **Forgot password?** option to open the **Reset Password** screen.



1. Reset Password Screen
2. Enter the e-mail or the user name in the **Email or Username** box.
3. Select **Reset via E-mail**. The user can reset the password using the verification link sent to the user’s email address.
4. 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 after five failed login attempts. The login attempts fail when the user enters an incorrect password. Contact the Okta administrator to reset the password.

On the successful resetting of the password, the new password is reset for the Navvis-Okta Single Sign-On account.

# UEE panel view— screen layout and navigation

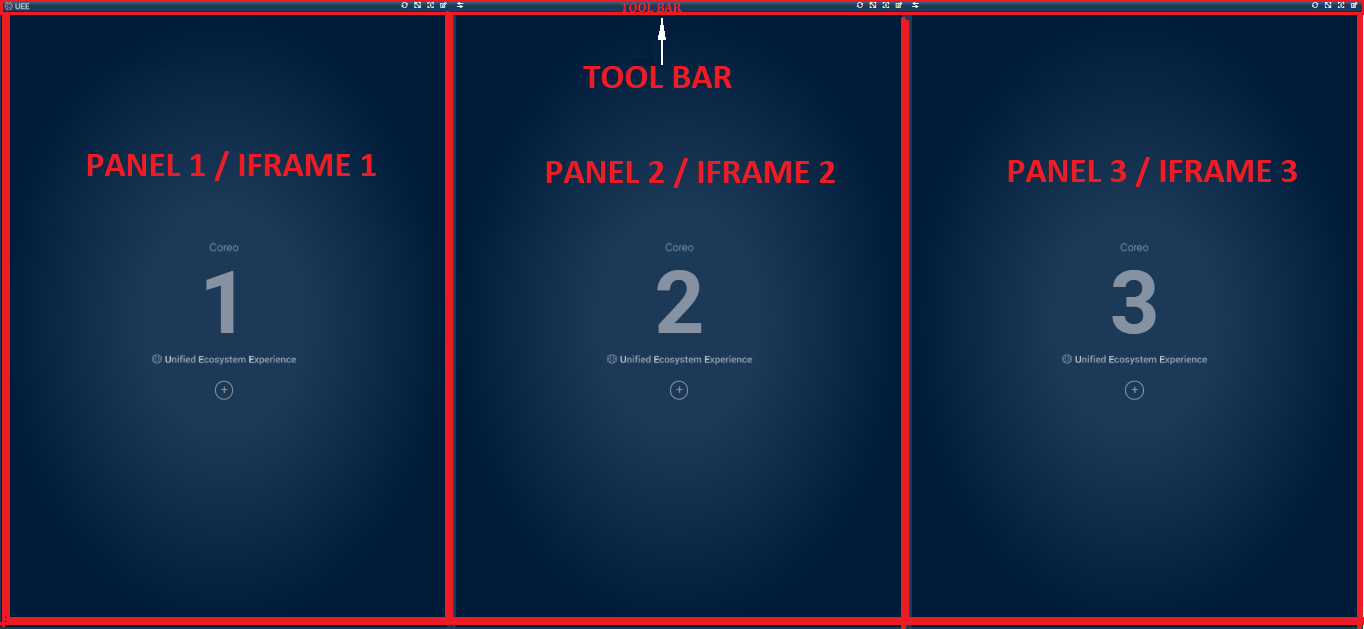
The screen layouts in the UEE application are similar in appearance. However, a few user interface elements differ depending upon the following reasons:

* 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

Use the display settings feature in UEE to configure the following panel views on your device screens:

* Single panel view: You can configure a Coreo application to view it in a single panel. The single panel layout is available on standard screens (4:3 aspect ratio resolutions) and widescreens (16:9 and 16:10 aspect ratio resolutions)
* Double panel view: You can configure the Coreo applications to view them in a double panel layout, with each application assigned to a panel. The double panel view is compatible with widescreens only.
* Triple panel view: You can configure the Coreo applications to view them in a triple panel layout, with each application assigned to a panel. The triple panel view is compatible with widescreens only.

You can save each of these configurations, which can be applied to the device screen, as a preset.



1. Three Panel View

The UEE home page layout includes the following areas:

* Toolbar: Includes buttons to apply the presets to the panels, to access the display settings for the panel, and to control the magnification settings of the panel screen.
* Panel or Iframe: Each Coreo application can be assigned to a panel and can have a maximum of three panel views.

The user can assign the following Coreo applications to a panel at a time:

* + Coreo Analytics
  + Coreo Home
  + Coreo View
  + Coreo Care - Member View
  + Coreo Care – Provider View
  + Epic EMR
  + Navvis MedCompass Dev

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 and 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 tool bar.

Refer to the following table to view details about the elements on the tool bar.

| Icon | Element name | Description |
| --- | --- | --- |
|  | **UEE** Logo | The UEE logo |
|  | **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 device. Select the same button or select **Esc** on the keyboardto 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 tool bar using this window. |

1. Toolbar Elements

## Panel elements

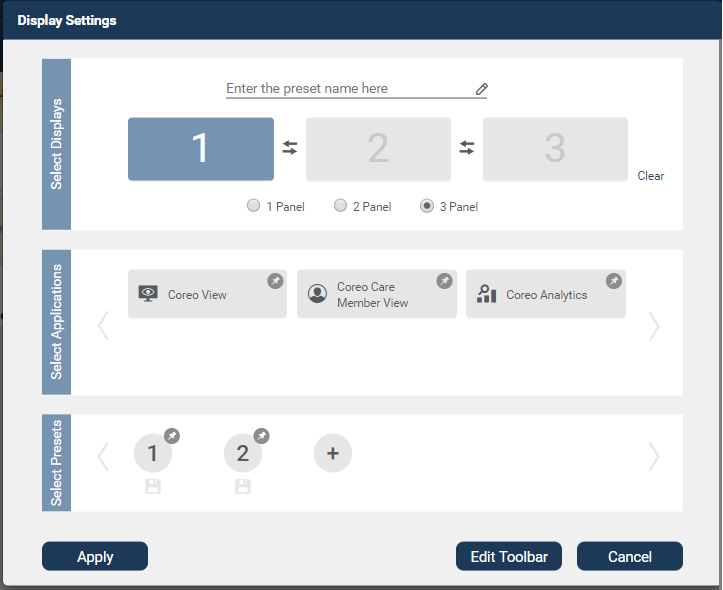
Refer to the following table to view details about the elements in the panel.

| Icon | Element name | Description |
| --- | --- | --- |
|  | Panel 1 | The first panel. The UEE screen can display a maximum of three panels. The first panel is the Left (**L**) panel. |
|  | Panel 2 | The second panel. The second panel is the Central (**C**) panel. |
|  | 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](#DisplaySettingsWindowPopup). You can click anywhere in the panel area to open the **Display** **Settings** window . |
|  | UEE logo | The UEE logo |

# Display settings for UEE panel view

## Display Settings window—layout and navigation

UEE provides the flexibility to configure different Coreo applications to view in different panels on the device screen.



1. Display Settings pop-up window

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

| Icon | Element name | Description |
| --- | --- | --- |
|  | **Select Displays** group | Use this group to do the following:   * Select the number of panels to display on the device screen. * Save the configuration as presets to apply to the screen for a double panel view and a triple panel view. * Swap the applications between the panel slots when configuring the applications for a double panel view and a triple panel view. * Delete the applications assigned to the panel slots using the **Clear** button |
|  | Panel radio button group | In this button group, select the number of panels to display on the device screen. |
|  | **1 Panel** button | Select this button to display the Coreo application in a single panel on the device screen. |
|  | **2 Panel** button | Select this button to display the Coreo applications in a double panel on the device screen, with an application configured to a panel. |
|  | **3 Panel** button | Select this button to display the Coreo applications in a triple panel on the device screen, with an application configured to a panel. |
|  | Panel 1 slot | Use this slot to assign a Coreo application to the first panel on your display screen.  In a single panel view, you can display the Coreo application either in the left panel, or in the central panel or in the right panel. |
|  | Panel 2 slot | Use this slot to assign a Coreo application to the second panel on your display screen. |
|  | Panel 3 slot | Use this slot to assign a Coreo application to the second panel on your display screen. |
|  | Swap button | Use this button to swap the Coreo applications between the panel slots when configuring the applications for a double panel view and a triple panel view. |
|  | **Clear** button | Use this button to delete the applications assigned to the panel slots. |
|  | LCR position buttons | Use these buttons to position the application view either in the (**L**) left panel, or in the (**C**) central panel or in the (**R**) right panel on the device screen.  These buttons are available only when you select the **1 Panel** button. |
|  | Preset name box | Enter the name of the preset in this box to save the preset and apply it to the device screen.  You can save only two panel and three panel configurations as presets. |
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# Configuring a Single Panel View

## Create a Single Panel View

## Apply a Single Panel View

## Pin a Single Panel View to the Toolbar

# Creating Presets for Multi-Panel View

## Create presets for double panel view

## Apply a double panel preset

## Pin a double panel preset to the toolbar

## Save and apply a double panel preset

## Create presets for triple panel view

## Apply a triple panel preset

## Pin a triple panel preset to the toolbar

## Save and apply a triple panel preset

## Switching between single panel view and multi-panel view

## Switching between double panel view and triple panel view

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## Panel formats in standard view and widescreen view

## Screen resolutions for optimal display of pinned applications

# Viewing synchronized patient records

Synchronize patient records across applications in panel view

Appendices

Credits

[www.bloomberg.com/profile/company/3553499Z:US](http://www.bloomberg.com/profile/company/3553499Z:US)

[www.navvishealthcare.com/](http://www.navvishealthcare.com/)

[www.linkedin.com/company/navvishealthcare](http://www.linkedin.com/company/navvishealthcare)

[www.pitchbook.com/profiles/company/88126-75](http://www.pitchbook.com/profiles/company/88126-75)

[www.crunchbase.com/organization/navvis-company](http://www.crunchbase.com/organization/navvis-company)

[www.healthcareitnews.com/blog/defining-population-health](http://www.healthcareitnews.com/blog/defining-population-health)

Glossary

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Index

[Depending on the size or complexity of the final document, insert an index to assist the user in locating specific information. Index entries correspond to tags or categories, and are useful in navigating long books.]

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