

Heaton Eye Staff Directory - Admin Portal User Guide

Version 1.0 | Last Updated: November 2025 **Portal URL:** <https://staff.heatoneye.com/admin>

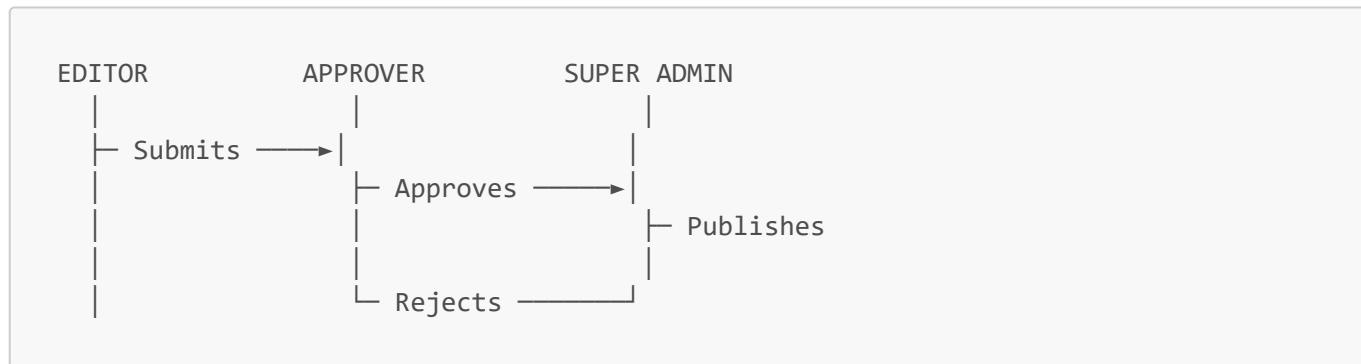
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System Overview

The Heaton Eye Admin Portal manages the public employee directory at <https://staff.heatoneye.com>. Changes flow through a three-stage approval workflow to ensure accuracy.

Approval Workflow Diagram



Available Tabs (by Role)

| | Super Admin | Approver | Editor |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Employees Tab | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pending Changes | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Version History | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Users Management | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Note: SSO/OAuth integration is planned for future implementation to streamline the login process.

Role-Specific Instructions

Approver Guide

Review & Approve Only

Login Credentials

- **Email:** m.balderas@heatoneye.com
- **Password:** Balderas2025!

What You Can Do

- View all employees in the directory
- Approve or reject pending changes
- View version history
- Cannot publish changes (Super Admin only)
- Cannot manage users (Super Admin only)

Common Tasks

Review & Approve Changes

1. Click "Pending Changes" tab
2. Review each submission carefully:
 - **ADD:** New employee being added
 - **EDIT:** Existing employee info being updated
 - **DELETE:** Employee being removed
3. Click "Approve" if change is correct
4. Click "Reject" if change has errors
5. Approved changes wait for Super Admin to publish

Bulk Approve Multiple Changes

1. Check the checkbox next to each valid change
2. Click "Approve Selected (X)" button
3. All selected changes move to approved status

What Happens After You Approve?

- Changes move to "Approved & Ready to Publish" section
 - You'll see message: "X changes ready for Super Admin to publish"
 - Super Admin receives daily email notification
 - Super Admin will publish changes to live directory
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Editor Guide

Submit Changes Only

Login Credentials

- **Email:** editor@internal
- **Password:** HeatonEditor2025

What You Can Do

- View all employees in the directory
- Submit new employee additions
- Submit edits to existing employees
- Submit employee removals
- View pending changes you submitted
- Cannot approve or reject changes
- Cannot publish changes
- Cannot manage users

Common Tasks

Add New Employee

1. Click "Employees" tab
2. Click "Add New Employee" button
3. Fill in all required fields:
 - First Name
 - Last Name
 - Email
 - Extension
 - Location (Tyler, Athens, Longview, Gun Barrel City)
 - Title (optional)
4. Click "Submit for Approval"
5. Change appears in "Pending Changes" tab with "Awaiting Approval" badge

Edit Existing Employee

1. Click "Employees" tab
2. Find the employee to edit
3. Click "Edit" button
4. Update the necessary fields
5. Click "Submit for Approval"
6. Change goes to pending review

Delete Employee

1. Click "Employees" tab
2. Find the employee to remove
3. Click "Delete" button
4. Confirm deletion
5. Deletion request goes to pending review

View Your Submissions

1. Click "Pending Changes" tab
 2. Your submissions appear with "Awaiting Approval" badge
 3. You cannot approve your own changes
 4. Wait for Approver or Super Admin to review
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Approval Workflow

Step-by-Step Process

Step 1: SUBMISSION (Editor)

- Editor makes a change in the Employees tab
- Change is saved as "pending" status
- Change appears in Pending Changes tab

Step 2: REVIEW (Approver or Super Admin)

- Reviewer sees change in "Pending Review" section
- Reviewer examines before/after data
- Reviewer clicks "Approve" or "Reject"

Step 3: APPROVAL (Approver or Super Admin)

- If approved: Change moves to "Approved & Ready to Publish"
- If rejected: Change moves to "Rejected" section (greyed out)
- Email notification sent to Super Admin (daily at 9:00 AM)

Step 4: PUBLISH (Super Admin Only)

- Super Admin clicks "Publish X Approved Changes"
- All approved changes apply to live directory
- Version snapshot created automatically
- Published changes removed from pending list

Change Statuses

Pending Review

- Waiting for Approver or Super Admin review
- Editor sees "Awaiting Approval" badge
- Approver sees approve/reject buttons

Approved & Ready to Publish

- Change has been approved
- Waiting for Super Admin to publish
- Highlighted in green

Rejected

- Change was rejected during review

- Will not be published
 - Displayed greyed out for record keeping
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Email Notifications

Who Receives Emails?

- Currently, the Super Admin receives email notifications when approved changes are ready to be published
- This is an interim solution - the workflow will eventually move to a fully automated publishing process

When Are Emails Sent?

- Daily at 9:00 AM UTC (3:00 AM CST / 4:00 AM CDT)
- Only if approved changes are waiting to be published
- No email if no approved changes exist

What's in the Email?

- Count of approved changes waiting
- Breakdown by type (Add, Edit, Delete)
- Direct link to admin portal
- Professional Heaton Eye branding

Sample Email Content

 Approved Changes Ready to Publish

There are 3 approved employee directory changes waiting to be published:

Change Summary:

- Add: 1 employee
- Edit: 2 employees

[Review & Publish Changes] (button)

Troubleshooting

Can't log in / "Invalid credentials"

Solution:

- ✓ Verify email address is correct (case-sensitive)
- ✓ Verify password is exact (case-sensitive, includes special chars)
- ✓ Try copying password directly from this guide
- ✓ Contact support if password needs reset

Don't see "Approve" button on pending changes

Solution:

- ✓ Check your role: Editors cannot approve changes
- ✓ Editor role sees "Awaiting Approval" badge instead
- ✓ Only Approvers and Super Admins can approve

Don't see "Publish" button

Solution:

- ✓ Only Super Admin can publish changes
- ✓ Approvers will see message about waiting for Super Admin
- ✓ This feature is restricted to Super Admin role only

Don't see "Users" tab

Solution:

- ✓ Only Super Admin has access to user management
- ✓ Approvers and Editors cannot manage users
- ✓ This is expected behavior for security

Changes not appearing on public directory

Solution:

- ✓ Verify changes have been published (not just approved)
- ✓ Check staff.heatoneye.com to confirm
- ✓ Try hard refresh: Ctrl+F5 (Windows) or Cmd+Shift+R (Mac)
- ✓ Allow 30 seconds for CDN cache to clear

Didn't receive email notification

Solution:

- ✓ Emails only sent if approved changes exist
- ✓ Emails sent once per day at 9:00 AM UTC
- ✓ Check spam/junk folder
- ✓ Email notifications are currently sent to Super Admin only
- ✓ Manually check portal instead of waiting for email

Security Best Practices

Password Security

- ✓ Change default passwords after first login
- ✓ Use strong, unique passwords (12+ characters)
- ✓ Include uppercase, lowercase, numbers, symbols

- ✓ Don't share passwords between users
- ✓ Store passwords in secure password manager

Account Security

- ✓ Log out when finished using the portal
- ✓ Don't share login credentials
- ✓ Report suspicious activity immediately
- ✓ Use private/incognito browser on shared computers

Session Management

- ✓ Sessions expire after 7 days of inactivity
- ✓ You'll need to log in again after expiration
- ✓ This protects against unauthorized access

Data Protection

- ✓ Only submit accurate employee information
 - ✓ Double-check data before submitting
 - ✓ Don't submit personal/sensitive information beyond directory needs
 - ✓ Version history maintains audit trail
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Support Contact

For technical support or questions about the admin portal:

 **Email:** tickets@heatoneye.com

For Heaton Eye-specific questions, contact your internal IT department or authorized admin.

End of User Guide