

**Important Notes:**

Before, we move into the dashboard, these are a few points that we need to keep in mind while accessing the dashboards:

Use the Back, Home buttons given on the dashboard**.** Do not use the back and forward buttons on the browser. Doing that will log you out of your profile and any changes made will not be saved.

If anything goes wrong even after following the steps given in this file, please contact Sakshi Sanjay Salokhe at [sakshisanjay.salokhe@wellnow.com](http://sakshisanjay.salokhe@wellnow.com)

**Levels of Access:**

There are 3 levels maintained so as to ensure security and maintain integrity of data as well as to maintain consistency.

1. Admin Level – Melissa Cortes
2. Managers of Each Dashboards – Sara, Jolene, John and Crystal
3. Employees – That handle the data entry for the parts they are responsible for in each individual dashboard.

**Basic working and features:**

1. **Registration:**
   * 1. Registration allowed using **wellnow.com** email addresses only.
     2. Password and confirm password during registration should match.
     3. Choose your own dashboard that you are responsible for.
     4. Choose **yes** if you are a manager. Else choose **No.**
     5. Upon successful registration, an email will be sent to you about confirmation and to your immediate manager as well.
     6. You will be approved by your immediate manager before you are able to log in.
     7. In between this time, if there were any mistakes made by you in registration (spelling mistake, wrong dashboard, wrong answer to if you are a manager or not), please email your immediate manager or the admin (Melissa) and hey can edit your details before approving your account.
     8. Once approved, you will receive an email about the approval and then you may log in using the same email address and password used during registration.
2. **Forgot Password**
   1. Once approved by the admin / manager, you can log into your account using the email id and the password used for registration. If you forget the password, use the **Forgot Password** link to restore the password.
   2. It will ask you to enter the email id used for registration. Once you hit submit, an email containing a unique code will be sent to that email address. Use that code to restore your password and reset it to a new one in the form you will be redirected to.
3. **Login**
   1. Once you are able to log in, you will be directed to the appropriate page based on your role (Admin, Manager, Employee) and your dashboard (AR, OS, OM, Patient Support).
   2. **Change Password:** You can change your passwordif you need to even after logging in. You can enter only your own email id to do that, otherwise it will throw an error.

If it throws an error even after you enter your own email id, try logout and login again and then try to change the password.

**Login Pages based on your roles:**

1. **Admin - Melissa:**
   * + **Approve / Edit/Delete Managers**:

She can edit the details and approve the newly registered managers. If an employee puts in Manager as his role by mistake, the admin can change that too.

If a person is found to be fake or something is found to be wrong, she can directly delete that profile.

* + - **Delete / Inactivate Existing Managers**:

If a manager has to be put on hold for certain amount of time, he can be deactivated here and activated again in the next button.

If a user leaves the company or is no longer responsible for his role, he can be deleted and all his rights will be removed.

* + - **Edit Dashboard Privileges**:

The admin can decide which manager can have access to enter data in which attributes. If no access given, the manager will not be able to enter / edit the data.

Any employee that is displayed with a red background color, is the one that has been deactivated i.e. he may not be able to log in at all unless he is activated again.

* + - **Approve / Edit/Delete Employees**:

If a manager enters his role as **No** for Manager, the admin can edit the details here and approve him.

If an employee needs to be urgently approved and his manager is not available, the admin can approve or delete or edit that employee.

* + - **View Dashboards**:

The admin will be able to choose the dashboards whose data he / she wants to view or visualize.

* + - * **View Data:** He can view the older data based on any date range he enters.

Or he can view todays data.

Both the views will have the total and the average for each attribute displayed.

* + - * **Visualize data:**

The admin can enter a date range and then choose which dashboard he wants to visualize the data for and how he wants to visualize it (Daily, Weekly, Monthly, Daily with goals).

Charts can also be visualized for today’s data.

* + - * **View goals:**

The manager for each dashboard might set goals for each attribute. The admin may view the goals for each month.

* + - * **Enter Today’s data:**

If the employee / manager fails to enter today’s data due to any reason, the admin should be able to enter the data for any dashboard.

* + - * **Enter Old data:**

If the employee / manager fails to enter the data or even if you find that some older data was wrong or missing, due to any reason, the admin should be able to enter the data for any dashboard by selecting the correct dashboard and the date.

1. **Managers –** Sara, Jolene, John, Crystal**:**
   * + **Approve / Edit/Delete Employees**:

A manager will only be shown the users that belong to his dashboard. If there is anyone who entered the dashboard wrong, edit the details and change it to the right dashboard.

The managers can approve the appropriate users that belong to their dashboard and delete the fake ones.

* + - **Delete / Inactivate Existing Users**:

If a user / employee has to be put on hold for certain amount of time, he can be deactivated here and activated again in the next button.

If a user leaves the company or is no longer responsible for his role, he can be deleted and all his rights will be removed.

* + - **Edit Dashboard Privileges**:

The manager can decide which user can have access to enter data in which attributes. If no access given, the user will not be able to enter / edit the data.

Any employee that is displayed with a red background color, is the one that has been deactivated i.e. he may not be able to log in at all unless he is activated again.

* + - **View Dashboards**:

The user will be able to choose the data he / she wants to view or visualize *only for their own dashboard*.

* + - * **View Data:** He / She can view the older data based on any date range he enters.

Or he can view todays data.

Both the views will have the total and the average for each attribute displayed.

* + - * **Visualize data:**

The manager can enter a date range and then choose which dashboard he wants to visualize the data for and how he wants to visualize it (Daily, Weekly, Monthly, Daily with goals).

Charts can also be visualized for today’s data.

* + - * **View goals:**

The manager for each dashboard might set goals for each attribute. The manager may view the goals for each month.

* + - * **Enter/Edit Today’s data:**

If the employee fails to enter today’s data due to any reason, the manager should be able to enter / edit the data for any dashboard.

* + - * **Enter/Edit Goals for the current month’s data:**

The manager can enter the goals for each attribute for that current month. At any point of the month, the manager can edit the goals if he wants to.

* + - * **Enter Old data:**

If the employee fails to enter the data or even if you find that some older data was wrong or missing, due to any reason, the managers should be able to enter the data for his/her particular dashboard by selecting the correct dashboard and the date.

1. **Employees / User:**
   * + **View Data:**

The employee will be able to view the data between the date range that he provides. The data will be shown with the calculated average and total for each attribute.

* + - **Enter / Edit Data:**

The manager / admin provides privileges to each user for which attribute of the dashboard is he responsible for.

In this section, the user will be able to enter/edit today’s data for the attributes that he is responsible for.

He will be able to view the other data if the other employees have entered but can edit or enter only where he has the access.