Login & Registration & Forgot password:

1. Every user who has an account can click login and entering the information to login to system
2. Any user who didn't have an account can click Create one in login page and entering their information to register an account
3. Any user who forgot their password can click Forgot Password? in the login page and entering their information to match with the database to reset a new password.

View and edit leader Profile:

1. After log in, you will see the leader home page, clicking the profile button on the top navigation which is on the top right corner of the home page to enter the profile page.
2. Then in this profile page, you will be able to see all information about this leader account, clicking on the button which looks like three dots to enter the profile edit page.
3. In the profile edit page, you can modify each value inside the page, after the changes are made, clicking on the save button, all changes will be saved into the database. In this page, age can be only numbers and it is between 0 to 99. In addition, the username you input will be compared with other usernames in the database, if the new username you set is already used by other users, the changes will not be made when you click on the save button.

Admin:

1. Login in as admin. Username: admin, Password: admin
2. In Dashboard, click match to manually match a coach for a leader or remove, change coach for a leader by selecting name in the dropdowns.
3. In Dashboard, click approve to approve any in progress AI matchmaking result
4. Click Coach
5. In Coach, click add and entering the fields(zoom key and zoom secret of this coach is input here) to add a new coach to database
6. In Coach, admin can delete any coach in the table by clicking the delete button
7. Click Leader
8. In Leader, click add and entering the fields to add a new leader to database
9. In Leader, admin can delete any leader in the table by clicking the delete button
10. Click Feedback
11. In Feedback, admin can approve any in progress feedback sent from leader, and the approved feedback will be send to coach
12. In Feedback, admin can delete any in progress or finished feedback by click delete button

Coach application:

1. In landing page, any user can click Join Us button in coach section and entering their information to apply for a coach
2. The entered information will be sent to admin's email by external API

View and edit coach Profile:

4. After log in, you will see the coach home page, clicking the profile button on the top navigation which is on the top right corner of the home page to enter the profile page.
5. Then in this profile page, you will be able to see all information about this coach account, clicking on the button which looks like three dots to enter the profile edit page.
6. In the profile edit page, you can modify each value inside the page, after the changes are made, clicking on the save button, all changes will be saved into the database. In this page, age and the years of experience can be only numbers and it is between 0 to 99. In addition, the username you input will be compared with other usernames in the database, if the new username you set is already used by other users, the changes will not be made when you click on the save button.

Feedback system:

leader provides feedback -> admin approve the feedback or delete -> if approve, coach can find feedback on coach's feedback page

leader provides feedback:

1. Log in as leader, you can see the home page of leader, clicking on the your coach button on the top navigation bar to enter that page.
2. If the leader has a coach, the schedule and coach information will be shown in this page, choose to click the good button or bad button under the question "Feedback for this coach?" to give an impression to this leader's coach. This needs to be done at first.
3. Clicking the feedback button on the top navigation bar.
4. In the feedback page, the leader can simply give a comment to the coach by writing some text in the text box on the bottom of the page and after pressing the enter key on the keyboard to send the comment.
5. Clicking the start survey button, a small window will pop up, it contains some information about the survey, and click next button to go to the next page.
6. This page contains a set of questions for leaders to rate their coach in different aspects, after the rates are given, just click on the done button to finish the survey.
7. this page will not be performed if (2) is not done

admin approve the feedback or delete:

1. Login as admin, click on the feedback button on the left side of the page.
2. You will be able to see all feedback sent by leaders inside a feedback table including information like average mark leaders give in the survey, who sent it, comment of this leader and impression of this leader, if you want to approve a feedback, just click the approve button after each feedback on the feedback table, if you want to delete it, just click on the delete button which is on the right of the approve button.

if approve, coach can find feedback on coach's feedback page

1. Log in as a coach, you will see the coach's home page, clicking on the feedback button on the top navigation bar.
2. You will be able see all leaders of this coach and all feedback sent by these leaders and have been approved by admin.

AI matching system:

process: newly registered leader input details to find a coach -> admin review the matching result to deicide agree or not -> if the matching is agreed, leader can see a coach is matched with this leader, coach can see a new leader is added into this coach's leaders list

newly registered leader input details to find a coach:

1. register a new leader(instruction can be seen above) and log in as this new leader, clicking the yourcoach button on the top navigation bar to enter the yourcoach page.
2. After clicking the 'find a coach' button, it will be redirected to the application page where leaders should provide information based on the different criteria.
3. After submission, the client will be notified in the dashboard and judge the result of the AI matching.
4. If the admin agrees with the result, the AI matching procedure is completed and the leader can see the information of the coach either in your coach page and assessment page.

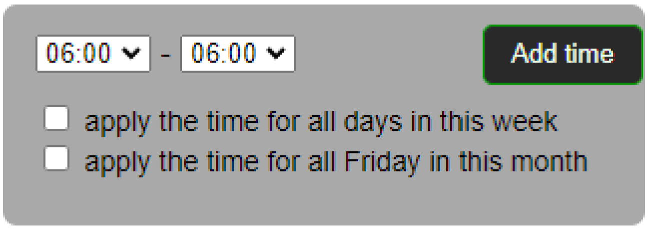
Schedule functionality:

coach provide available time by adding time into calendar -> leader pick time from calendar to schedule a meeting with this leader's coach -> leader and coach can see new meeting is add into the next sessions list

coach provide available time by adding time into calendar:

1. Log in as coach, click the schedule button on the left side of the page to check the calendar.
2. Click on a date which is not earlier than current time(since an available time can't be added into a date in the past), there shows all available time that have been provided by this coach on the right side of the calendar, if it is blank, it means the coach hasn't add an available time on that date. By choosing a time period (e.g. 6:00 - 8:00), few different one-hour time will be added into the calendar (e.g. 6:00 - 7:00 and 7:00 - 8:00 will be added into the calendar if 6:00-8:00 be chose). If the `apply the time for all days in this week` option is checked, these one-hour available times will be added to all dates in the same week, the second option follows the same logic but adds those times to all (Monday/Tuesday … Sunday) in that month. After the time period and option are selected, click on the add time button, those available times will be

added into the calendar.




3. In the calendar, the added time will look like this:


This one is the time that hasn't been picked by anyone and the one below is picked by someone and it shows the name of the leader who picked the time.

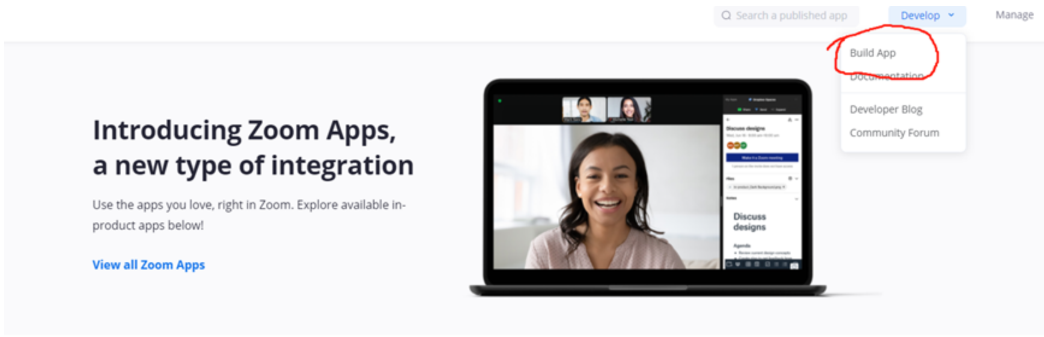

leader pick time from calendar to schedule a meeting with this leader's coach

1. Log in as leader, click the your coach button to enter the your coach page and check the calendar.
2. All available times provided by the coach will be shown on the right of the calendar, leaders are able to pick time to schedule meetings by clicking on the pick button, it will show picked after leaders clicked on it.
3. On the home page, the next sessions section contains a list of scheduled meetings . Each scheduled meeting's time and a zoom button containing the zoom meeting link are displayed there, leaders can just click on the zoom button to join the meeting.
4. Log in as coach, on the coach's home page there is a next sessions list as well, it contains some extra information for each meeting, it shows the leader who will take this meeting with this coach.

# How to get Zoom API key and secret

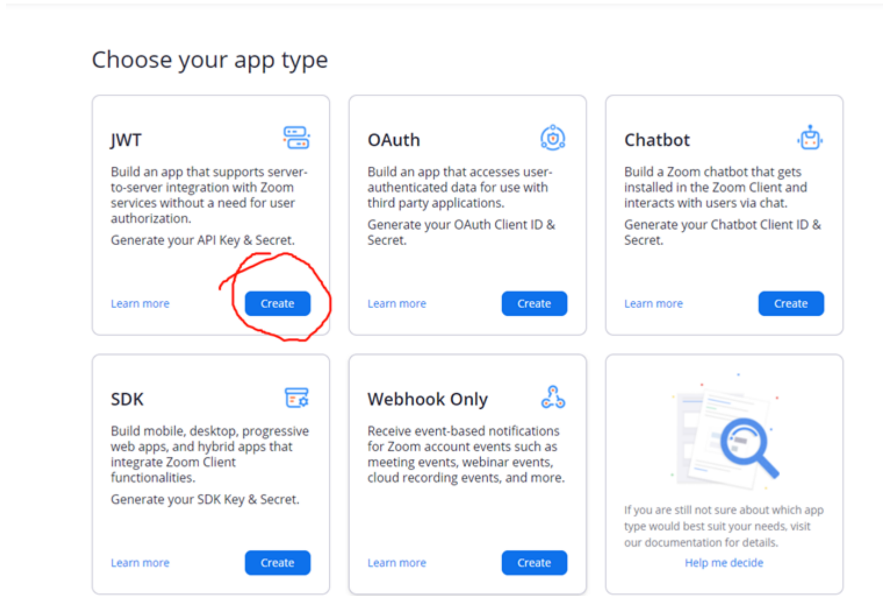
1:

Enter zoom market page, click 'Build App'



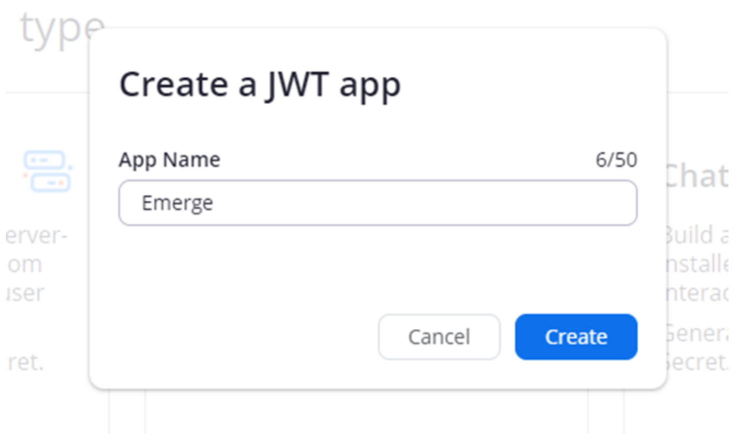

2:

Select JWT and click ‘Create’



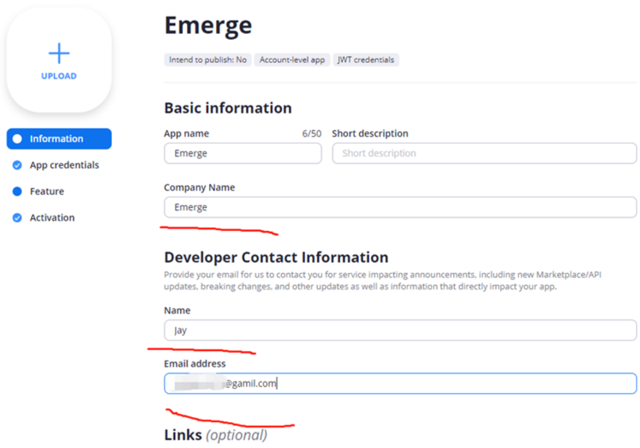

3:

Add name



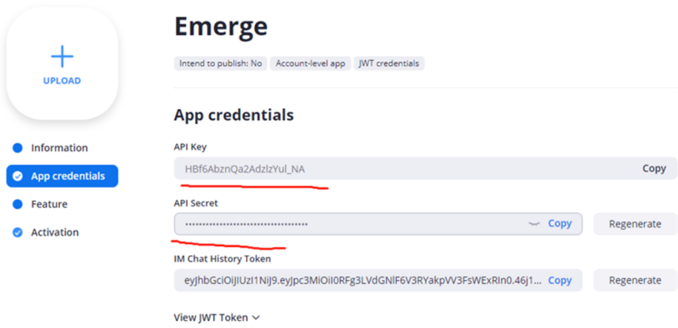

4:

Fill the company name, name ,email



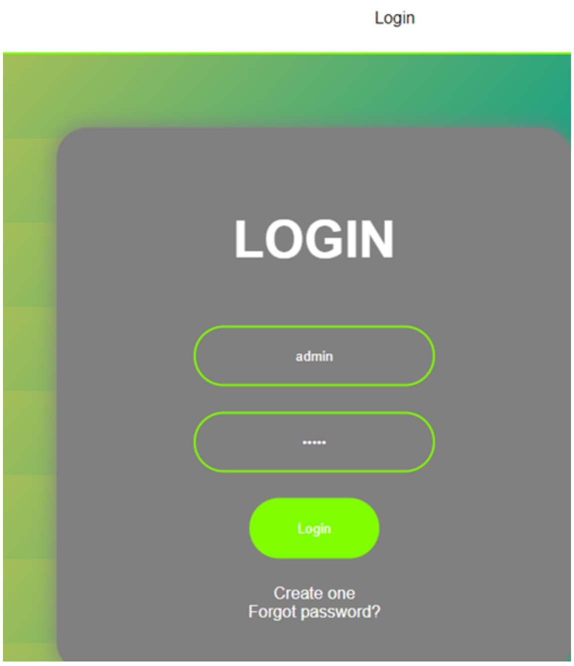

5:

Congratulate, you get it!



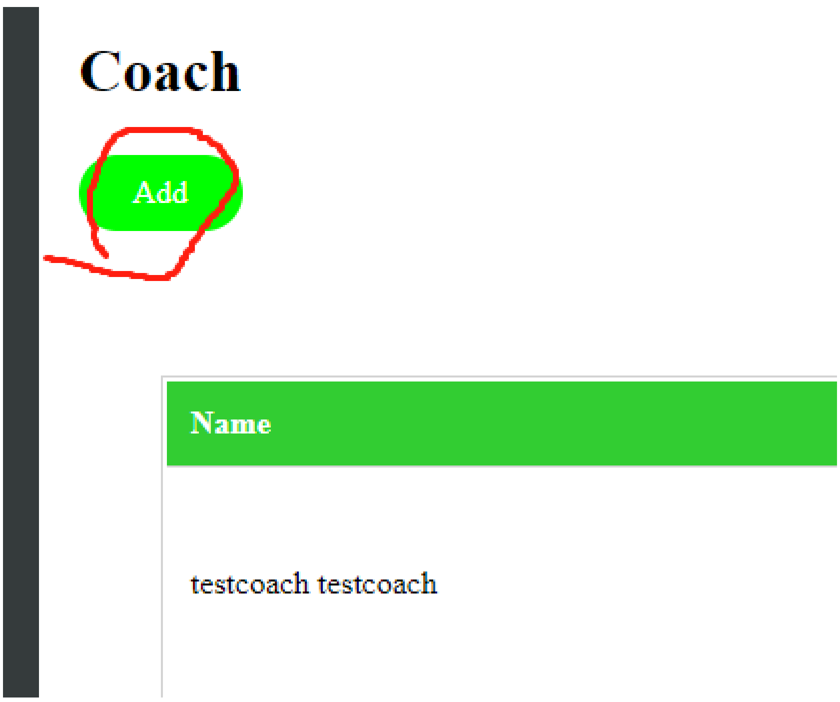
6.

Back to Emerge website, login with admin account




7.

Click ‘add’




8. Input zoom API key and secret into the related form, then click ‘add’


Message function

1. Login as leader, pressed YourCoach page.
2. Click on Message icon to start chatting with the coach
3. Login as coach, pressed on the leader’s name.
4. Click on the Message icon to start chatting with the leader.

Goals setting

1. login as leader, click on the goal section
2. click on the “+” sign to create a goal
3. press “made progress” after a session with the coach
4. login as coach, lick on the leader’s name
5. able to see the progress of the leader