

## MX3 Portal Guide ( May 2023)

The MX3 Portal is a centralized database for MX3 measurement data.

This guide will walk you through how to use the MX3 Portal to set up your team or organization, manage user accounts, and export data.

If your organization is **already using MX3 products**, please contact your MX3 administrator to request access.

For video guides on using the MX3 Portal and App visit: <https://mx3diagnostics.com/setup>

# Account Registration

To register for an account visit <https://portal.mx3.app> and click "Sign up".

## Portal Overview

The MX3 Portal allows you to review your team or organization's data and manage user accounts.


You can use the portal to:

- Create new user accounts, individually or in bulk (**see: User Accounts**)
- Categorize users with "Tags" for easier analysis and management (**see: Tags**)
- Grant permission to users to conduct measurements, view, edit and delete measurement data (**see: Permissions**)
- Upgrade users to administrators (**see: Administrators**)
- Generate measurement reports (**see: Dashboard Reports**)
- View and export historical data and summary statistics (**see: Measurement Data**)
- Set up Measurement Surveys (**see: Measurement Surveys**)
- Set up alerts and notifications (**see: Dehydration Notifications**)
- Customize measurement recommendations (**see: Custom Recommendations**)
- Manage organizational settings (**see: Privacy Settings**)

**The Dashboard** shows a summary of recent measurements by your organization. You can use the dashboard to get a quick overview of recent measurements, a day-to-day measurement history, a comparison between tags and other statistics.

**The Measurements Tab**, accessed by clicking "Measurements" in the top panel, is where you can explore, analyze and export your organization's measurement history.

**The People Tab**, accessed by clicking "People" in the top panel, is where you can view and manage the members of your organization.

**The Settings Page**, accessed by clicking the  icon in the top panel, is where you can customize hydration guidance, set up notifications, manage administrators and manage other account services.

# User Accounts

## Creating user accounts

To add a user to your organization, go to the People Tab and click “New individual” in the sidebar. Users can also be added in bulk (see: **Bulk Import**)

### **Required: First/Last Name**

The only information required when adding a user is their first OR last name.

### **Optional: Picture**

A picture of the user which will be displayed in the MX3 App and Portal.

### **Optional: Email/Password**

If a user requires access to the MX3 App or Portal to manage users, conduct measurements of or view measurement data, they must have an email AND password.

### **Optional: Membership**

The MX3 App and Portal uses tags to categorize users for monitoring and analysis (see: **Tags**). Users may be assigned to multiple tags. Examples of a tag could be a shift, such as the AM shift on a worksite, or a location, such as the Perth Office

### **Optional: Visibility**

Hidden users and their measurement data do not appear in the portal and mobile application but may still log in to the MX3 App or Portal if they have login credentials.

### **Optional: Permissions**

Permissions are used to grant a user access to view, edit or delete users and measurement data in your organization (see: **Permissions**) Permissions may be restricted to specific tags.




### **Optional: Additional Information**

Custom information fields may be added if required

## Bulk Import – Adding multiple users at once

To access the Bulk Import page, go to the People Tab and click “Bulk import” in the sidebar.

The Bulk Import users:

1. Download and fill in the Excel template. Multiple Tags should be separated with a semicolon.
2. Choose your filled in file and click Upload
3. Review the list of users and tags and address any import issues
  - a. If a user with the same name is detected, it will be highlighted with a yellow  and not be imported by default. You can override this by checking the box.
  - b. If an email which has already been used is identified, it will be highlighted with a red . Such users cannot be imported unless the email address is changed.
  - c. Hover over any  to see the reason for the alert.
4. Click **Apply**


Users may also be imported in bulk using the Client API which allows for programmatic access. More information about the MX3 API can be found at <https://api.mx3.app/doc/>

MX3 accounts may also be managed through the Azure Active Directory SSO feature. Setup documentation for this feature can be found at <https://learn.microsoft.com/en-us/azure/active-directory/saas-apps/mx3-diagnostics-connector-provisioning-tutorial>

## Editing/Deleting user accounts

To edit a user, go to the **People Tab** and click on the photo (or the circle with their initial if no photo has been uploaded) next to the desired user. Click **Update** to finalize the changes.

To delete a user account, click on the  icon on the user profile page.

To edit or delete user accounts in bulk, go to the **People Tab** and select the desired user profiles using the checkboxes to the left of the user profiles then click on the  icon above the table and select the desired option.

# Tags


The MX3 Portal and App uses Tags to categorize users. Users may be assigned as many tags as desired.

Examples of a Tag could be:

- A team (e.g., Football Team),
- A position within a team (e.g., Goalkeepers),
- A shift (e.g., Morning Shift),
- A location (e.g., New York Office).

## Creating a Tag

To create a new tag:



1. Click on the  icon to open the settings page
2. Click on **Tags** in the side panel
3. Click on **+NEW** button
4. Type the new Tag name in the pop-up box and click **OK**
5. Select the users you would like to group with this Tag
6. Click **Update**

You can also create Tags during user account creation by typing the name of a new Tag and clicking **CREATE NEW TAG**.

You can also create Tags during bulk user import by typing the name of a new Tag in the Tags column.

## Adding or removing members from a Tag

To modify Tag membership:

1. Click on the  icon to open the settings page
2. Click on **Tags** in the side panel
3. Click on the  icon to the left of the desired Tag
4. Click on the **Members** Tab
5. Click on the box next to **Bulk add/remove mode**
6. Select/Deselect the desired users
7. Click **Update**

You can also modify a user's Tag(s) on their individual profile (see **Editing a User Account**)


# Administrators

By default, the administrator is the person who registered your MX3 Account in the MX3 Portal or MX3 App.

Administrators are your organization's direct contact with MX3 and can view, edit and delete all accounts and measurement data from your organization.

Administrators are the only user type which can edit other users' permissions and upgrade other users to administrators.

## Managing administrators

To manage your organization's administrators, click on the  icon in the top right, then click **Administrators** in the sidebar.

To upgrade a user to an administrator, Use the search box to find the desired user account and click **Add**. Only users with an associated email and password can be upgraded.

To remove an administrator, click on  icon next to the desired user.

If a current administrator is not available to add a new administrator, please contact MX3 Support: [support@mx3diagnostics.com](mailto:support@mx3diagnostics.com).

## Permissions

Permissions are used to grant a user access to view, edit or delete users and measurement data in your organization. To be assigned permissions a user **must have** an email and password assigned to their account.

Permissions are separated into “Accounts” and “ Past Measurements” permissions and can apply to all users in your organization or be restricted to a specific tag.

All users, regardless of permissions, can measure themselves and view their own measurement data if they have been assigned an email and password. Administrative accounts have full permissions which cannot be restricted.

Below is a summary of the permissions granted at each level:

### Accounts Permissions

Level	Description
None	Can only view their own account/data
View	Can view users but cannot edit/create accounts.
View and Measure	Can view and measure users but cannot edit/create accounts
View, Measure and Edit	Can view, measure and edit/create users but cannot delete accounts
View, Measure, Edit and Delete	Can view, measure, edit/create and delete user accounts

### Past Measurements Permissions

Level	Description
None	Can only view their own measurement data
View	Can view historical measurement data but cannot edit (reassign to another user, modify notes or modify linked measurements) or delete measurement data
View and Edit	Can view and edit historical measurement data, but cannot delete measurements
View, Edit and Delete	Can view, edit and delete measurements.

To assign permissions to a user:


1. Go to the desired user’s profile (see **Editing a User Account**)
2. In the Permissions section of the user profile click “**Add additional permissions**”
3. Select “**All Users**” or the desired tags
4. Select the desired level of Accounts and Past Measurements Access in the pop-up the click **Submit**
5. Click **Update**

## Dashboard Reports

The Dashboard shows a summary of recent measurements by your organization. You can use the dashboard to get a quick overview of recent measurements, a day-to-day measurement history, a comparison between tags and other statistics.


### Modifying the Dashboard

Information displayed on the dashboard may be modified by clicking on the **View** button on the top left and selecting the desired filters.

Some graphs on the dashboard may also be modified by hovering over the graph and clicking the  icon.

### Exporting Dashboard information

A PDF report of the currently displayed dashboard information can be exported by clicking the **Export** button on the top right.

Individual dashboard images may also be downloaded by hovering over the graph and clicking the  icon.



# Measurement Data



## Viewing Measurement Data

You can view measurement data by clicking on the **Measurements Tab**.

Measurements may be filtered using the quick filters on the left side of the page or using the filter button above the table.

You can also view data for a single user by clicking on the user's name on the measurements tab.

## Edit/Delete Measurement Data

You can modify a measurement by clicking on the  icon next to the desired measurement and clicking the  icon next to the user's name.

A measurement may be reassigned to another individual (i.e., where the incorrect user was measured), reassigned as a baseline measurement (See the [MX3 App user guide](#) for more information about baseline measurements), and assigned a Tag.


Click **SAVE** to finalize changes.

To edit or delete user measurements in bulk, go to the **Measurements Tab** and select the desired measurements using the checkboxes to the left of measurement records. Click on the checkbox counter above the table and select the desired option.

## Exporting measurement Data

You can export filtered or unfiltered measurement data as a CSV by clicking **export data** in the sidebar of the **Measurements Tab**.

## Generating Measurement Reports

You can generate a pdf measurement report by clicking on the  icon next to the desired measurement and clicking the PDF Report button.


# Measurement Surveys


A Measurement Survey is a list of questions presented to a user during or after a Hydration Measurement. Responses to a Measurement Survey are paired with a hydration measurement result and can be viewed in the MX3 App and MX3 Portal.

Survey questions can be one of the following types

- Text field – e.g. “Where are you currently located?”
- Number – e.g. “How much did you drink this shift in mL?”
- Options (select one) – e.g. “How fatigued do you feel right now?”
- Multi-select choices (select all that apply) – e.g. “Are you experiencing any of the following symptoms?”

To set up a Measurement Survey

1. Click the  icon and click “Measurement Survey” on the sidebar.
2. Set up the desired questions.
  - a. Click ADD QUESTION to add an additional question
  - b. Drag the questions to rearrange the question order.
3. Click Save

Measurement Survey data paired with a specific measurement can be seen by going to the **Measurements Tab** and clicking on the  icon next to the desired measurement.


Measurement Survey data can also be seen on the measurement CSV export. (see **Exporting Measurement Data**)

# Dehydration Notifications



## Dehydrated notifications

The MX3 Portal can send automated email notifications to alert relevant individuals if a user measures as moderately or severely dehydrated.

To enable dehydrated notifications for your whole organization:

4. Click the  icon and click **Notifications** on the sidebar.
5. Check the box next to **Enable Dehydration Notifications**.
6. Type in the email address you would like to receive notifications and click **Add**.
7. Click **Save**


To enable dehydrated notifications for a specific Tag

1. Click the  icon and click **Tags** on the sidebar.
2. Click the  icon next to the desired Tag
8. Check the box next to **Enable Dehydration Notifications**.
3. Type in the email address you would like to receive notifications and click **Add**.
4. Click **Save**

## Food/Drink Screening Confirmation Message

It is important for users to restrict from food or drink for at least 5 minutes before a hydration measurement is conducted.

To prompt users to confirm they have not eaten or drank in the last 5 minutes before each measurements:


1. Click the  icon
2. Click **Settings** on the sidebar
3. Tick the box next to **Ask users to confirm no recent food and drink consumption before measurements**
4. Click **Save**

## Custom Recommendations

The MX3 Portal may be used to customize the guidance displayed in the MX3 App on the measurement results page, and on measurement records.

Custom recommendations may be displayed for both Hydration and Sweat measurements and displayed to a whole organization, a specific tag or specific users.

To customize recommendations:

1. Click the  icon and click **Recommendations** in the sidebar
2. Select the type of recommendation you would like to modify (In-App or PDF reports) and the type of users you would like this to be displayed to (Entire Organization, Specific Tags, or Specific Users)
3. Select the type of measurement (Hydration or Sweat Sodium) and the measurement status
4. Type in your customized advice.
5. Click **Save**

To reset to MX3's default recommendations click **Reset**, then click **Save**.

## Privacy Settings

You can adjust your account privacy settings by clicking the  icon.

On this page you can:

- Allow MX3 to login to your account for assistance when contacting support.
- Permit MX3 to contact you if our automated systems detect you are getting high rates of error or abnormal readings.
- Adjust your communication preferences with MX3
- Enable two-factor authentication
- Close your account. Due to technical reasons, it may take up to 30 days for your data to be removed from our systems.