cme®

# Dashboard

## User Guide

# Contents

# Overview

The dashboard is designed to give you access to a live update on completion from your users, the ability to create team wheels, produce personalised Cs and to provide headline information on colour combinations. Where you have bought a block of credits, you will also be able to track the number of credits remaining.

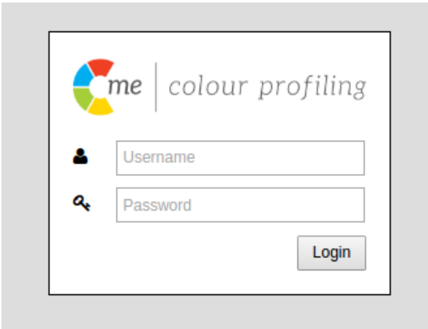
### Admin

The Admin Console is accessed at https://admin.cme-profiling.co.uk

*Data Limited*

You will only be able to see information for Reports, Users and Team Wheels generated for your own links (subdomains).

### Login




When accessing the site you enter your username and password to access the Admin Console. You will have been given your user credentials by one of the C-me Team along with the Dashboard User information.

### Logout

To log out of the Admin Console, click the three dots next to your login name in the top right-hand corner of the screen

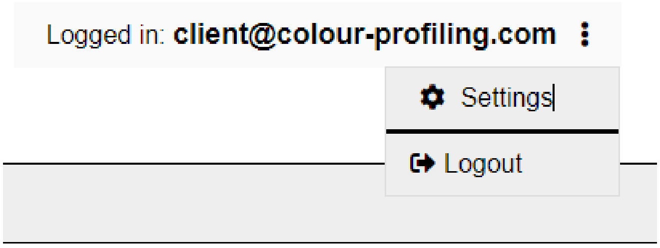

Select the option **Logout**

*Access Time*

A session on the Admin Console will persist for 30 minutes of inactivity. After that you will be logged out of the Console and you will need to login again.

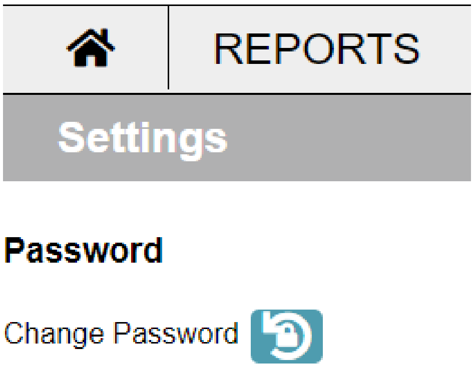
**Reset Password**

To reset your password, click on the 3 dots alongside your username in the top right-hand corner of the dashboard homepage:



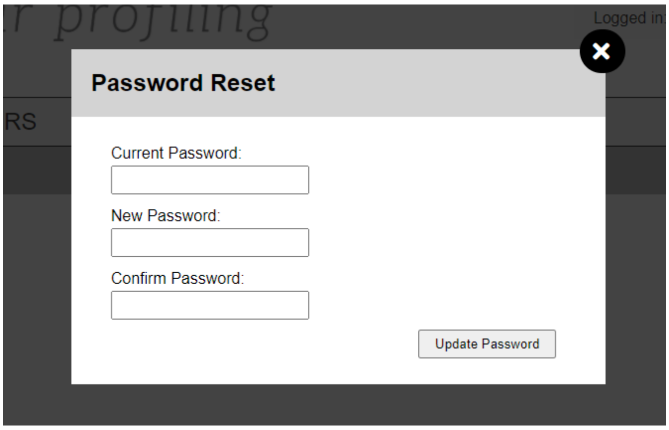

Then click 'Settings'

The Settings page will appear with the password change option below.




Click on the blue icon to the right of change password.

The password reset pop up will appear. Insert your existing password. Choose a new password and repeat this password in the confirm password field:

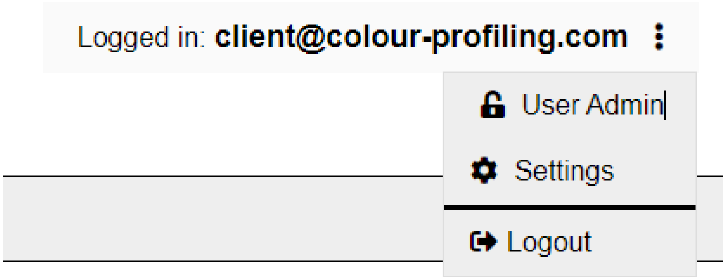



When ready click update password.

# Lead Admin Permission

As well as allowing you to edit users of profiles (see user section), if you have lead admin permissions you can also deactivate other dashboard users, edit their permissions and reset/change their passwords.

Click on the 3 dots next to your username in the top right hand corner:




Then click on User Admin. You should then see a list of Admin users for your dashboard. Their username, the billing client and whether or not they are currently active. Alongside each one you should see the following options:

The first icon is to deactivate a user. Where the user has left the company or should no longer have permissions for the dashboard. The second allows you to edit the dashboard user which essentially gives you a tickbox for each link (subdomain) under your dashboard. This is useful if you have different people with access to different links. The third icon allows you to change the password for that user.

***Note:*** The icons in blue are actionable. Any that appear in grey mean that you don't have permissions to make changes for that person (essentially other lead admins).

# Home Page

The Home Page shows the current usage of the system, remaining credits for your links (subdomains) and allows you to retrieve historic usage data as required.

## Recent Reports

This section shows the last 10 reports that have been generated for your links (subdomains), the status of the report and when it was created.

### Recent Reports

| User | Client | Top Colours | Status | Created At |
|---|---|---|---|---|
| Prince Holmes | Sales | | PROCESSED | 15:24:57 31/01/2018 |
| Klaudia Knight | Trial | | PROCESSED | 09:11:23 12/12/2017 |
| Paris Saunders | Trial | | PROCESSED | 21:20:58 07/12/2017 |
| Tiana Phillips | Trial | | PROCESSED | 17:51:15 07/12/2017 |
| Dalton Butler | Trial | | PROCESSED | 17:01:22 07/12/2017 |
| Klaudia Knight | Trial | | PROCESSED | 15:15:32 07/12/2017 |
| Neil Kennedy | Trial | | PROCESSED | 13:10:44 07/12/2017 |
| Leland Owen | Trial | | PROCESSED | 12:52:17 07/12/2017 |
| Iain Mason | Trial | | PROCESSED | 11:32:55 07/12/2017 |
| Zackary Ross | Trial | | PROCESSED | 10:19:06 07/12/2017 |

## Remaining Credits

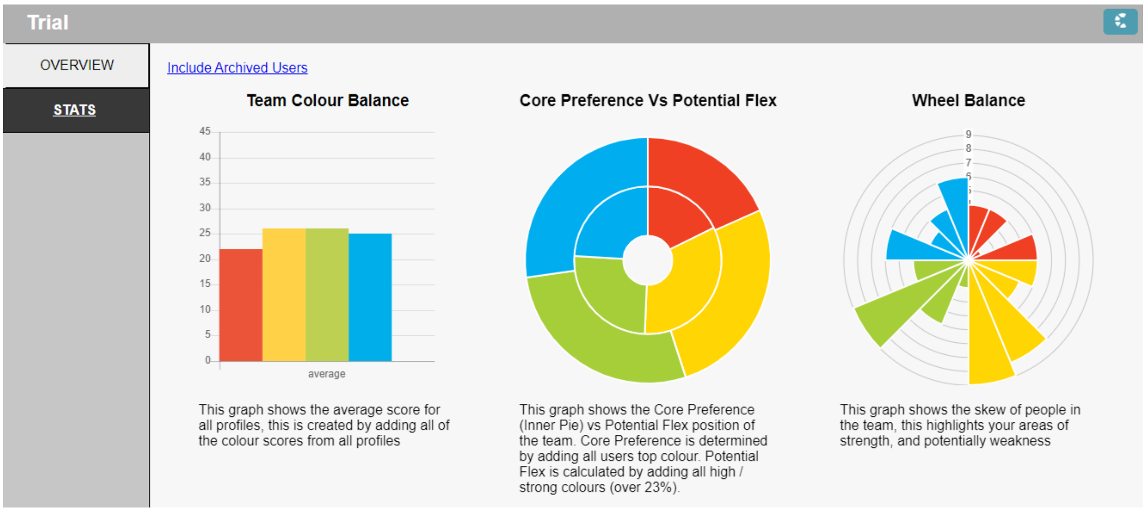
This panel shows each link (subdomain) per client and their remaining credits, sorted in alphabetical order.

### Remaining Credits

| Name | SubDomain | Report Type | Remaining Report |
|---|---|---|---|
| Client 1 | subdomain1 | Youth | 5 |
| Staging | staging | Core | 999999999 |
| test24 | test24 | Youth | 1000000000 |
| Mary's Sums | marysum | Summary | 1000000000 |
| No Logo | logolas | Summary | 1000000000 |

If a link (subdomain) has 10 or less credits remaining then the client will be highlighted in yellow showing that action is required to purchase further credits.

As well as showing the remaining credits, you can also click on the Name on the left hand side as a shortcut to an overview of your link and a stats summary.

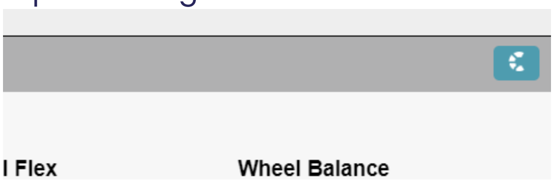



Here you can also see who has completed through this link and a summary of their colour preference. This information can be exported to an Excel spreadsheet using the export report details button:

**Profiles Generated**

| User | Top Colours | Status | Created At |
|---|---|---|---|
| | | | Export Report Details: |
| India Gray | | PROCESSED | |
| Klaudia Knight | | PROCESSED | |
| Paris Saunders | | PROCESSED | |
| Tiana Phillips | | PROCESSED | |

You can also download the personalised Cs for everyone that has completed a report through this link. These will be downloaded to a zip file.



## Link Set Up

Each link listed has its own associated invitation and produces a different report type. These links can be set up to return reports direct to clients via a designated email address supplied by yourselves to the C-me Team. This email address would normally be that of the person who administrates the C-me link/s.

We are only able to associate this link with a single email address but should you want more than one person to have access to returning reports you could set up a C-meprofiling@ email address with an internal distribution list.

If you would like for us to send reports direct to individuals as they complete them, this can also be arranged. In this instance we can also ask the system to return a copy to your designated email address at the same time, if this is required.

If you require further links, for a different report type or for another organisation you are working with for example, please contact the C-me Team and we can set this up for you.

## Monthly Report

**Monthly Usage Reports**

February 2020

| Client | Report Type | SubDomain | Reports Sent to | Num Reports | Free Reports |
|---|---|---|---|---|---|
| Staging Youth | Youth | staging-youth | profiles@colour-profiling.com | 2 | 0 |
| Staging HP Plus | High Performance PLUS | staging-hpplus | profiles@colour-profiling.com | 1 | 0 |
| Trial | Sales | staging-sales | profiles@colour-profiling.com | 1 | 0 |

profiles@colour-profiling.com Send

Select the month and year that you wish to see the usage report for. The reports are broken down by subdomain and report type.

Selecting the current month will give the usage to date for the month.

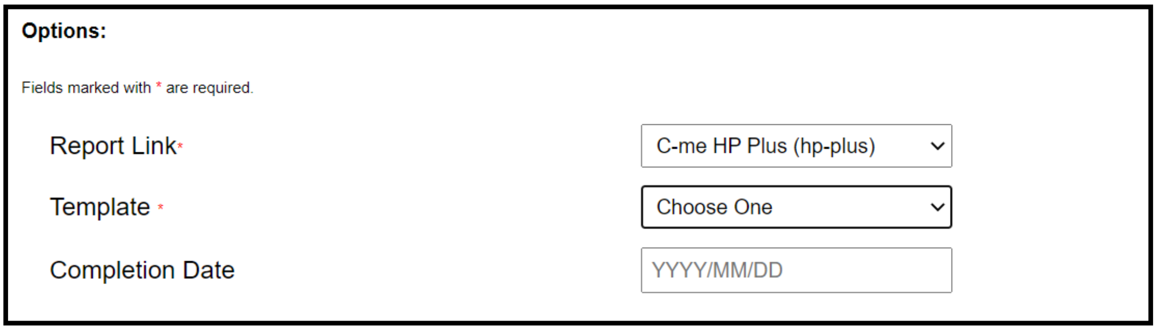
***Note**: Free Reports, these are reports that have been refunded by C-me for promotional or other reasons. These reports will appear highlighted in purple on your dashboard.*

***Note**: Selecting a month in the future will return no reports.*

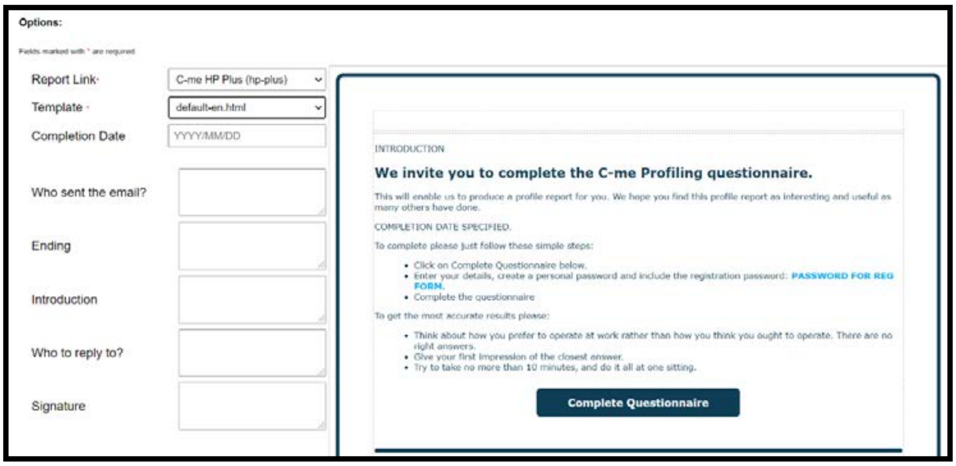
# Invitations

## Sending invitations

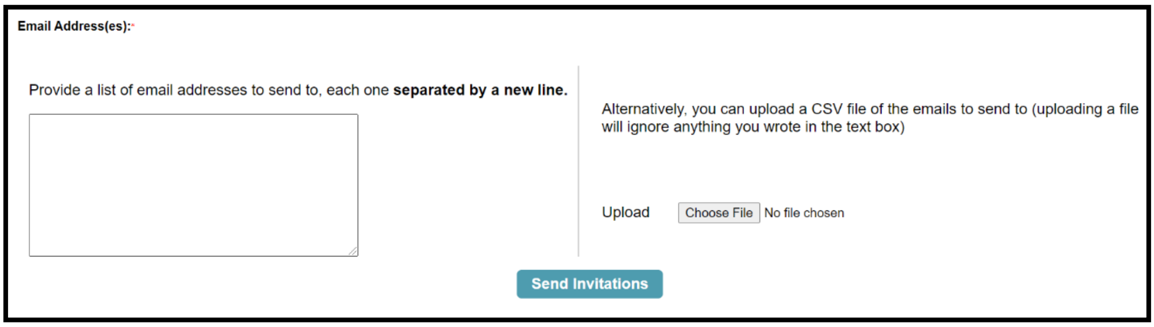
- Please log on to your dashboard and go to the 'Invites' tab where you will see the options screen below.




- Click on the dropdown under 'Report Link' and choose which invitation you would like to send.
- Then click on the dropdown next to 'Template' and choose the option **that isn't default.**
- Add a completion date if you'd like to. This will be displayed to delegates on the invitation they receive.
- You will see an invitation preview appear on the right-hand side of the screen as below:



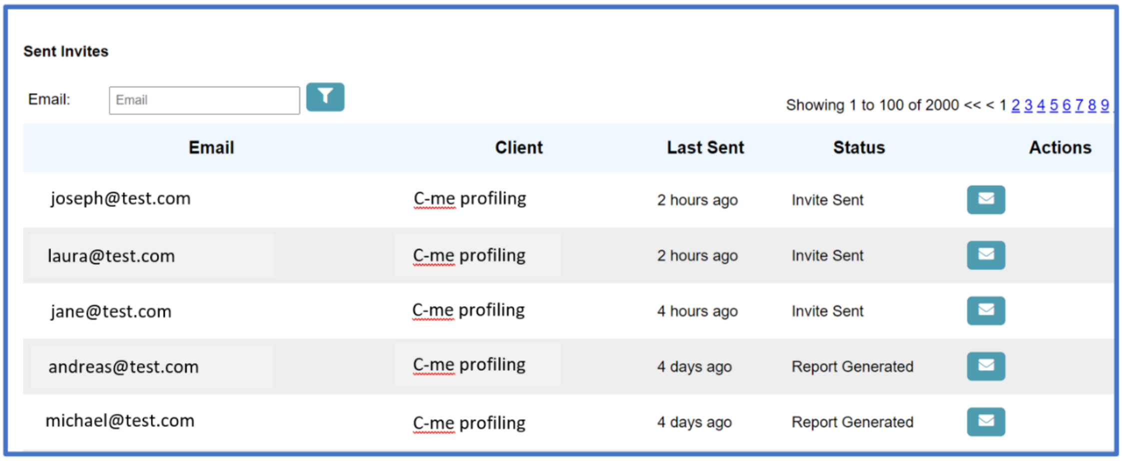

- Some of the boxes will be prefilled on the left-hand side and you can prefill other options as desired.
- Once you have added these, click the 'Save defaults' button. This allows you to make the invitations bespoke to you and not have to enter this information every time.
- Scroll down to the bottom of the preview and you will see a box to add the email addresses of those you want to send invitations to.




- Please add/paste all email addresses into the box separated by a new line. If you have a large list then you can upload this as a CSV file instead. Simply click the 'Choose file' button on the right-hand side and select your file.
- Click 'Send invitations' button.
- A pop up will appear saying 'Invitations sent to x number of people'.

## Tracking and resending invitations

- Go to the 'Invites' tab.
- Scroll to the bottom of the screen to 'Sent invites'.




- Here you will see a list of invitations that have been sent. You can use the search button to search for an email address.
- Next to each entry, you will see these details:

  **Last sent** This will tell you when they were last sent an invitation.

  **Status** This will either tell you that the invitation has been sent, that an account has been created or that their report has been generated.

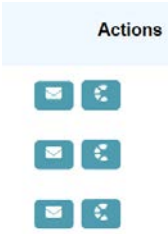
  **Actions** You will see an envelope button which can be used to resend the invitation if still not completed.

# Reports

This page gives details of the status of reports that are being/or have been processed by the system.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 63c5631cc21b073ce842eb82 | Trial HP | HP Plus Remote | Iris Hall | | 7 | 20,32,30,16 | 11,44,37,6 | PROCESSED | 8/15/22 |
| 63c5631cc21b073ce842eb81 | Trial HP | HP Plus Remote | Sean Hughes | | 11 | 16,20,38,25 | 2,20,46,31 | PROCESSED | 8/15/22 |
| 63c5631cc21b073ce842eb80 | Trial HP | HP Plus Remote | Alicia Morgan | | 11 | 14,18,34,32 | 4,6,51,37 | PROCESSED | 8/15/22 |

The table includes the link that the reports have been generated for and the status of the report.
At the end of each row are icons relating to actions




## Resending a Report

The Reports tab gives you the option to resend a report where needed by clicking the resend icon for example when time has lapsed and the report can't be found by the user. This will then resend the pdf to the email associated with your link (subdomain).

***Note:*** Resend does not deduct a credit from your account and will resend exactly the same report that the user first received.

## Personalised Report

You can download personalised Cs for individual reports in the report tab, using this icon . See information on Personalised Cs.

C-me
124 Wells Road, Bath, BA2 3AH
e: contact@colour-profiling.com
t: 01225 721971

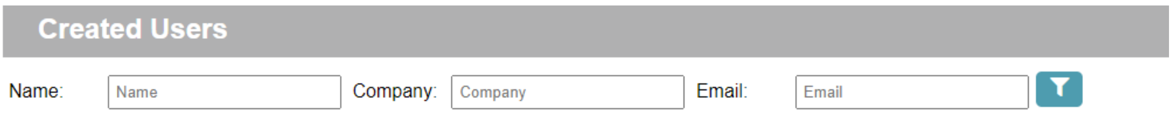
# Users

The Users table allows Admin Users to see if a user has registered to start creating a Profile. Fields displayed depends on the level of dashboard user access. Lead admin or dashboard user. The email address field will only be displayed if you are allocated lead admin status.

Under Report status it will either appear as completed, if they have finished the questionnaire and a report has been generated or it will be blank which will mean they have registered but not yet completed.

| Name | Email | Company | Created | Report Status | Actions |
|---|---|---|---|---|---|
| Scott Murphy | sm@blueberries.com | Blueberries | 04/12/2017 | Completed | |
| Myles Carter | mc@strawberries.com | Strawberries | 04/12/2017 | Completed | |
| Tiana Phillips | tp@kiwis.com | Kiwis | 04/12/2017 | Completed | |
| Chase Mitchell | cm@lemons.com | Lemons | 03/12/2017 | Completed | |

## Filter Users




Filter Users in the User Table by entering search text as per the description in the table.

| Filter | Description |
|---|---|
| **Name** | Matches against part or the whole of either the firstname or surname |
| **Company** | Matches against the Company if filled in during the registration process |
| **Email (lead admin only)** | Matches against part or the whole of the email |

***Note:*** *A user is created at the start of the profile generation on the website but may not have completed the profile generation steps at that point, please go to the Reports Section in order to access the time that the user profile was completed.*

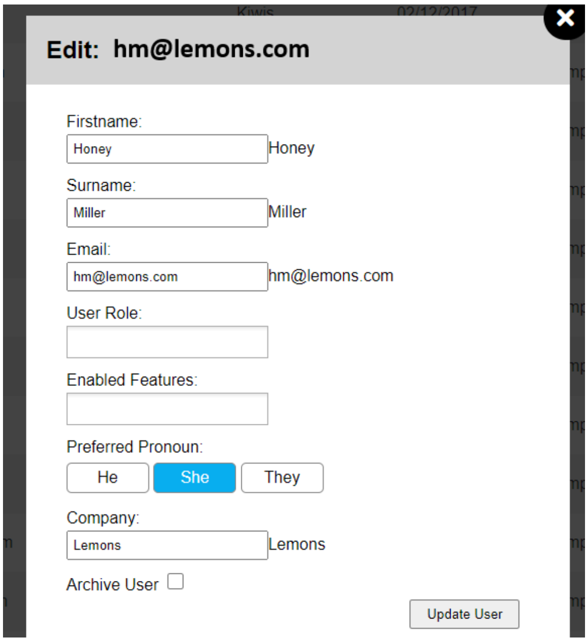
## Editing Users

Those with lead admin permissions will be able to edit names, email addresses and preferred pronoun for their users where mistakes have been made. This is particularly useful in the cases where people have entered their names in all caps for example which then appears in caps all the way through their reports.

In the User tab, click the edit icon alongside the user you wish to edit

| | | | | | |
|---|---|---|---|---|---|
| Maggie Allen | ma@blueberries.com | Blueberries | 01/12/2017 | Completed | |
| Rosa Cook | rc@strawberries.com | Strawberries | 01/12/2017 | Completed | |
| Nina Bailey | nb@lemons.com | Lemons | 01/12/2017 | Completed | |
| Honey Miller | hm@lemons.com | Lemons | 01/12/2017 | Completed | |
| Demi Parker | dp@blueberries.com | Blueberries | 01/12/2017 | Completed | |

The following dialogue box will appear:




You can then make the necessary changes and click update user when you are finished. All the fields excluding User role and Enabled features will be editable by lead admins. These two fields are only able to be edited by C-me Admin Users.

# Team Wheel – Adapted and Natural

The Team Wheel functionality allows you to add multiple people who have previously completed the C-me questionnaire on to a single wheel showing the behavioural preference make-up for that team. Both the adapted and the natural team wheels can now be calculated. Once all of the selected users have been added to the wheel, this can then be processed as a report. You will also have the option to add the natural team wheel to the processed report.

### Overview

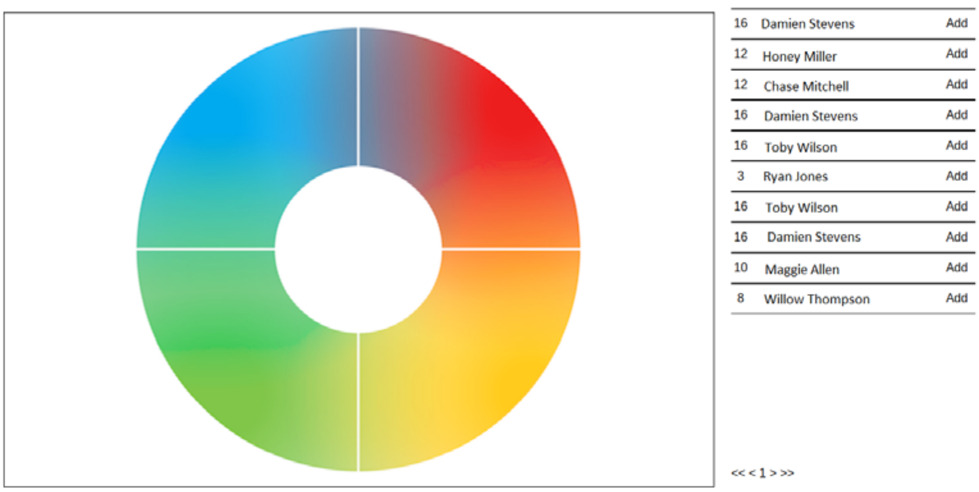
This page shows the current team wheels that are being created and the reports that have been completed and sent to the client.

### Create a New Wheel

Click "Create New", +, in the top right, the default setting will be to create an adapted wheel as this is the wheel position shown in the individual's report. This will open the editor on a blank Team Wheel.

### Team Wheel Creator

The Wheel is used to visualise the reports that should be added to a Team Wheel prior to the wheel being sent to the client.




### Users

On the right of the screen is the list of all of the users that have created a report, this can be filtered, see Filters. Please note that the Users may appear below the wheel on your screens.

### Adding a User

To add a User to the wheel simply click “Add” next to their name, this will place a small disc on the wheel representing their behavioural colour preference or wheel position.

### Removing a User

To remove a user from the wheel click “Remove” next to their name or click the X next to the user names that appear around the wheel in the wheel image box.

***Note:*** *When a User is added to the Team Wheel, a placeholder is added. When the wheel is saved the Users wheel positions are then ordered so that the numbers are arranged in a clockwise direction around the wheel.*

### Filter

| Filter | Description |
|---|---|
| **Billing Client** | Matches reports created for any link assigned to that billing client |
| **Sub-Domain** | Matches reports created on the selected link |
| **Name** | Matches on any part of the username, this is not case sensitive |

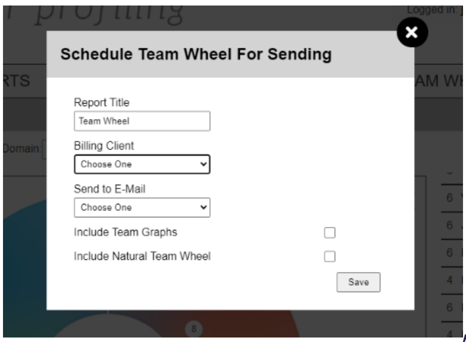
### Two Stage Filter

This filter works in 2 stages, typing in the “Name” field will filter the users currently shown, clicking “Filter” will send a request to the database and get all results that match.

Selecting Billing Client or Sub-Domain require “Filter” to be clicked in order to update the results.

### Saving a Wheel

To save the current status of a Team Wheel, click “Save”, , in the top right. A saved Team Wheel can be restored from the Overview screen for further editing or processing.



,

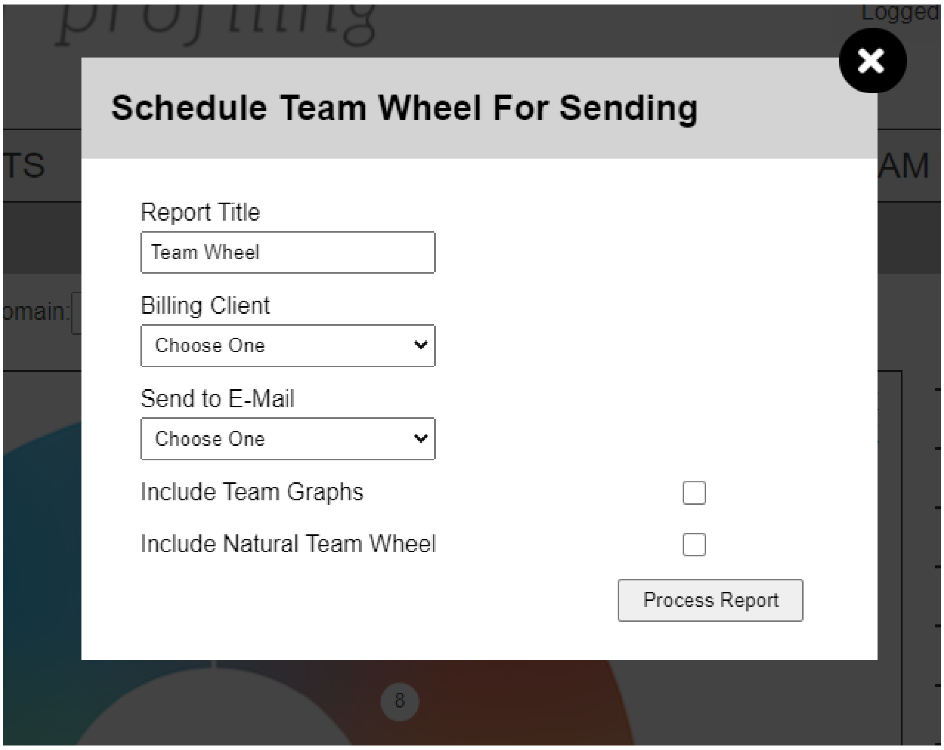
Give the team report a title that enables it to be easily identified in search options etc.

Choosing the billing client will then determine the email address options for sending the report. You will only see the billing clients you have been given permission for.

Tick to include team graphs and the natural team wheel depending on requirements. Then click save.

**Sending a Wheel**

To send a Team Wheel to a client click "Send", , this will open the send screen




Again, if you haven't already, give the team report a title that enables it to be easily identified in search options etc.

Choosing the billing client will then determine the email address options for sending the report. If you have already done this and saved the wheel it should automatically populate this. Again, you will only see the billing clients you have been given permission for.

Tick to include team graphs and the natural team wheel depending on requirements. Then click 'Process Report'.

A pdf report will then be scheduled for delivery to the email address associated with your account.

***Note:*** *You may experience display issues with wheels containing over 40 users. This will be largely dependent on density of colour preference as to maximum numbers of users displayed on a wheel. You are able to keep adding users beyond this but they may no longer display clearly in the exported pdf. The Wheel Balance graph can be a useful alternative visual for cases where the wheel doesn't comfortably hold the number of users you are wanting to display. See accompanying wheel visuals.*

The final icon in the team wheel creation page alongside the send and process icons is the export icon .

This creates a downloaded csv file for this team that illustrates the breakdown of colour scores for both adapted and natural preferences for each team member.

## Existing Team Wheels

The table on the left of the screen shows Team Wheels that have already been created arranged in date order.

Title: Billing Client: Any Client Created: Select Month Year

| Id | Client | Title | Num Profiles | Updated At | Actions |
|---|---|---|---|---|---|
| hNg3bJ9WwO | Trial | Sample Team Wheel Jan 18 | 12 | 17/09/2021 | |
| xhN0gTyfWK | Trial | Sample Team Wheel | 6 | 23/08/2018 | |
| Xutt88Xf3L | Trial | Sample Team Wheel Dec 17 | 9 | 23/08/2018 | |
| w1uLbVwcot | Trial | Team Wheel | 7 | 04/12/2017 | |

Most of the titles are self-explanatory. The client refers to the billing client. Number of profiles refers to the number of users that appear on this wheel.

The three action icons are edit, send and download Cs for the users in this team wheel (see personalised Cs). Clicking the C icon will create a download zip file of all the Cs.

You can filter the team wheels created by any of the fields above the list: team wheel title, billing client, month and year created. Followed by the filter icon

## Edit Team Wheel

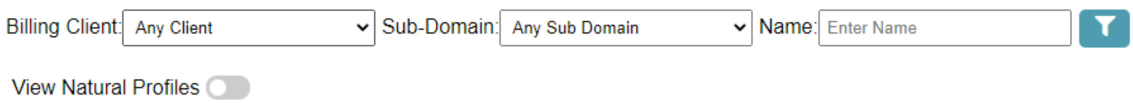
In order to edit an existing Team Wheel, click "Edit", , this will open the last saved state in Team Wheel Creator. You can then add and remove users as desired. The natural team wheel option will automatically appear in edit mode.

## Send Team Wheel

To send an existing Team Wheel to a client click "Send", , this will open the send screen.

## Including Natural Team Wheels

This option automatically becomes available to view when editing existing team wheels. Moving the slider across will show you the natural team wheel for those users.

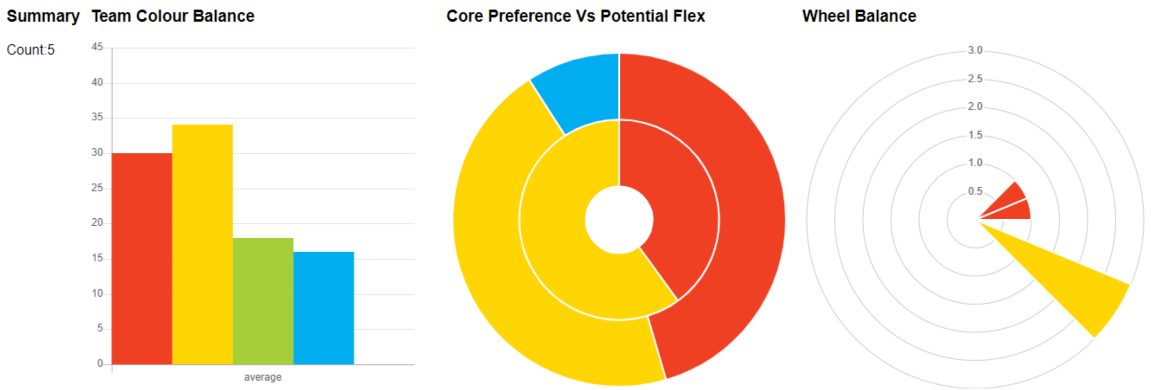



When creating new team wheels this option doesn't become available until you save the team wheel ticking the natural team wheel option in the saving team wheel dialogue box (See saving a team wheel) at which point the View Natural Profiles option pops up and you can then view the natural team wheel for these users by moving the slider across.

## Accompanying Wheel Visuals

You will notice as you create a team wheel that underneath the team wheel there are a number of other visuals that are created for the same team. These are the visuals referred to in the save and process dialogue boxes 'Include team graphs' which once checked the system will include these as part of the pdf. Which can provide valuable further insight into the team dynamics.

As mentioned in previous notes. The wheel balance graph can be useful when the amount of users you want to display on a team wheel exceed the optimum amount of users to fit comfortably around the wheel.




This graph shows the average score for all profiles, this is created by adding all of the colour scores from all profiles

This graph shows the Core Preference (Inner Pie) vs Potential Flex position of the team. Core Preference is determined by adding all users top colour. Potential Flex is calculated by adding all high / strong colours (over 23%).

This graph shows the skew of people in the team, this highlights your areas of strength, and potentially weakness

# C-exporter

On the Reports, Team Wheel and Subdomain page it is possible to generate C's for the users that have completed a report.

In order to export a C click the , this then downloads the Cs to your computer. This download will be a png if a single C or a zip file if there are more than one. Your link (subdomain) can be set up to provide these as default with your report pdfs when you have dashboard access to C generation.