

# First Time Set-Up – Organization Set-Up

Welcome to the MX3 Organization Set-Up Guide.

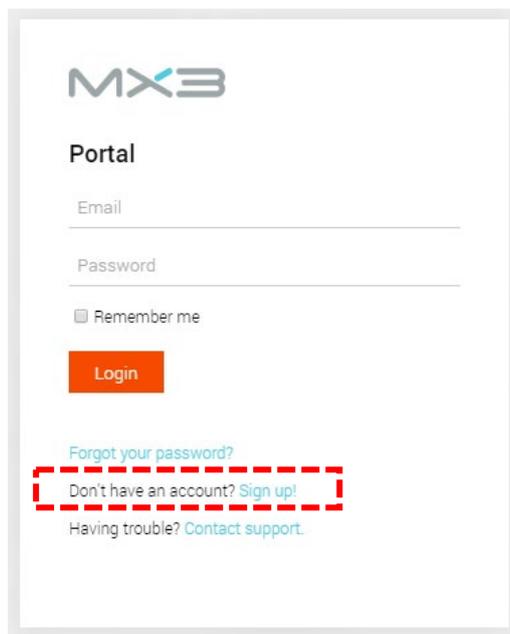
If your organization is already using MX3 products, please contact your MX3 administrator to request access.

If you already have log in details, skip to the guide on how to use the MX3 app to take hydration measurements.

## Account Registration

How do I register for an MX3 Account?

To register for an account visit <https://portal.mx3.app> and click "Sign up!" Fill in the required fields and click register.



MX3

Portal

Email

Password

Remember me

Login

[Forgot your password?](#)

[Don't have an account? Sign up!](#)

[Having trouble? Contact support.](#)

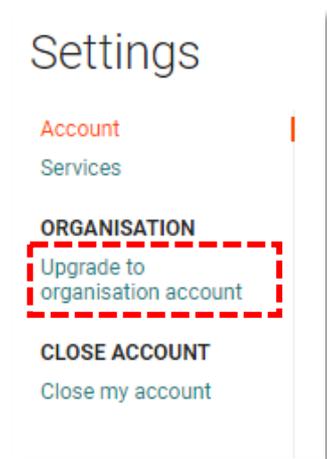
## How do I upgrade to a team/organization account?

By default, all new MX3 accounts are individual account. To upgrade to a team/organization account, log in to the portal, click on the settings icon in the top right and then click “upgrade to organization account” on the sidebar.



Nominate a name for your organization and click “upgrade”.

To finalize the upgrade, log out to the MX3 portal by clicking on the log out icon and then log back in using your login details.



## Portal Overview

The MX3 Portal allows you review your team or organizations data and manage user accounts.

**The Dashboard** shows a summary of recent measurement 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.

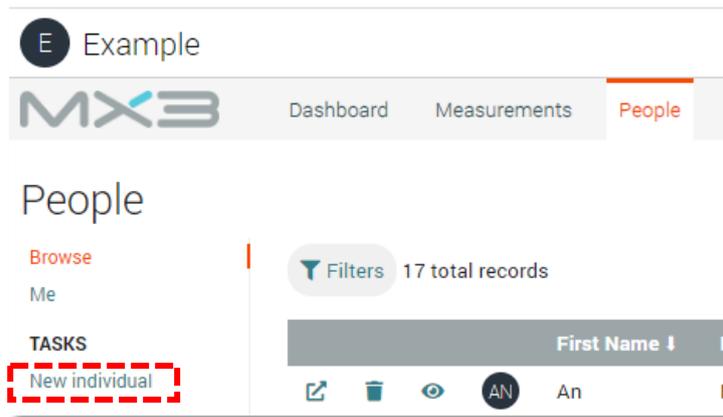
**The Measurements Tab**, accessed by clicking “measurements” in the top panel, is where you can explore, analyze and export your organizations measurement history.

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

For a more detailed explanation on how to use and customize these pages of the portal, see the portal guide available on our website ([www.mx3diagnostics.com/resources](http://www.mx3diagnostics.com/resources)).

## User Accounts

To add a user to your organization, go to the People Tab and click “New individual” in the sidebar.



The only information required when adding a user are their first or last name. You can also define an email and password for the user if they require access the MX3 App or Portal.

New individual	
First name	(blank)
Last name	(blank)
Picture	<input type="button" value="Choose file"/> No file chosen
Email	(blank)
Password	(Optional)

At this point you can also assign this user as a member of a tag.

## Tags

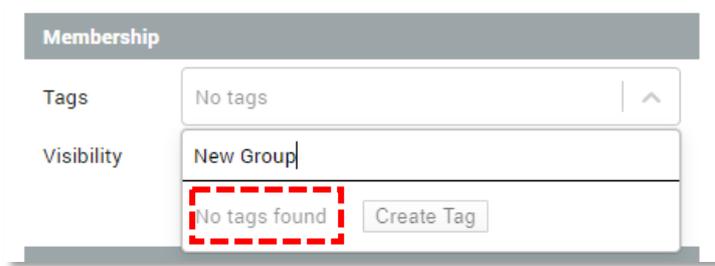
The MX3 Portal uses tags to categorize users for monitoring and analysis. Examples of a tag could be a shift, such as the AM shift on a worksite, or a location, such as the Perth Office.

Users may be assigned to multiple tags.

### How do I create a new tag?

To create a new tag:

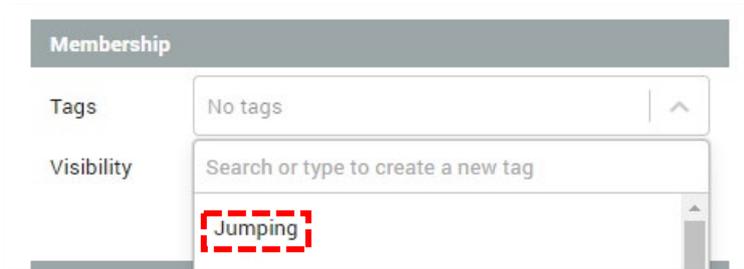
1. Click on the People Tab at the top of the portal.
2. Click on the  icon next to a user you would like to tag.
3. Type the name of the new tag in the Tags box. Then click "Create Tag"



## How do I add a tag to a user?

To add a user to an existing tag:

1. Click on the People Tab at the top of the portal.
2. Click on the  icon next to a user you would like to be tagged.
3. Type the name of the tag in the Tags box or select from the drop-down list.



## Tag Managers

A tag manager is an individual with additional permissions to modify and measure members with a specific tag. Examples of a tag manager would be a health and safety supervisor (e.g., OHS officer assigned to the AM shift) or an office manager (e.g., Manager of the New York office).

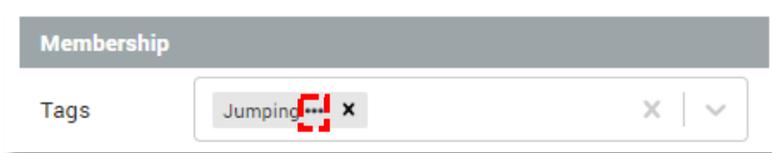
Users may be assigned as a tag manager for as many tags as desired.

## How do I make a user a tag manager?

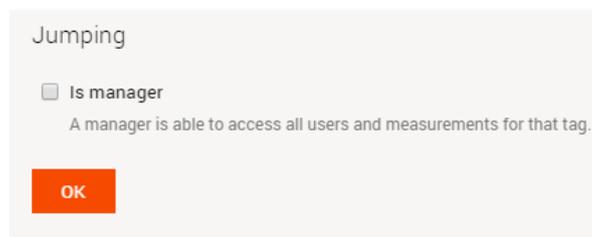
Only administrators can make a user a tag manager.

To create a new tag manager:

1. Click on the  People Tab at the top of the portal.
2. Click on the  icon next to a user you would like to manage the tag.
3. necessary, tag the user with the tag you would like them to manage (See **Tags**)
4. Click on the ... next to the Tag name in the Tags box



5. Tick the box next to Manager in the pop-up and press OK



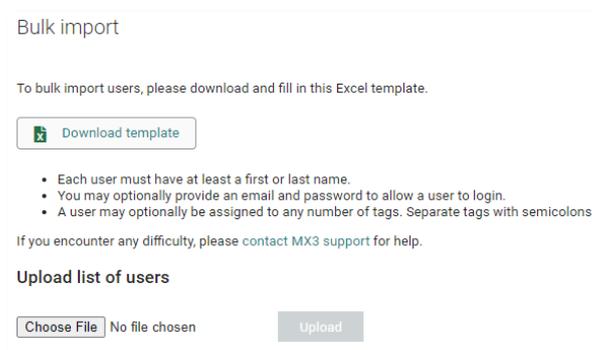
6. The tag will now appear red, indicating this user is a manager of this tag. Changes will be reflected next time the user logs into the MX3 App or Portal.



## Adding Users in bulk

### How do create users in bulk?

The Bulk Import page can be used to create many users at once.



1. Download and fill in the Excel template.
2. Choose your filled in file and click Upload.

3. You will be presented with a list of users which will be created.
  - If a user with the same name is detected, it will be highlighted with an exclamation ⚠ and not be imported by default. You can override this by checking the box.
  - If a user with an email which has already been used, it will be highlighted with a red exclamation ⚠. Such users cannot be imported unless the email address is changed.
  - Hover over any exclamation icons to see the reason.

**Users to create**

The following users will be created.

	First name	Last name	Email	Password	Tags
<input checked="" type="checkbox"/>	Alex	Holbrook			football
<input checked="" type="checkbox"/>	Austin	Goodrich	austin@example.com		football
<input checked="" type="checkbox"/>	Cade	Forester			baseball
<input type="checkbox"/>	⚠ D'Shawn	Williams			baseball
<input checked="" type="checkbox"/>	A user with the same name already exists.				baseball
<input checked="" type="checkbox"/>	Isaiah	Thompson			tennis

4. Once you are happy with the list of users, press Apply to create the users.

## Additional Features

The MX3 Portal has many other features including:

- Adding additional administrators to your organization
- Bulk tagging
- Report generation
- Hydration Notifications

For more information about these features see the Portal User Guide, available on our website ([www.mx3diagnostics.com/resources](http://www.mx3diagnostics.com/resources))

## Conclusion

Thank you for reading the organization set-up guide. For information about how to download the MX3 app and make hydration measurements see the MX3 App Set-Up guide.

If you require any further information about setting up your organization, you can find our portal guide documentation on our website resources page ([www.mx3diagnostics.com/resources](http://www.mx3diagnostics.com/resources)).

You can also get in touch with our customer support team by emailing [support@mx3diagnostics.com](mailto:support@mx3diagnostics.com)