

WellRyde Volunteer Driver – Managing Users

Overview

This job aid provides an overview of how to manage users in the WellRyde Dispatch Portal. You can complete the following task with this job aid:

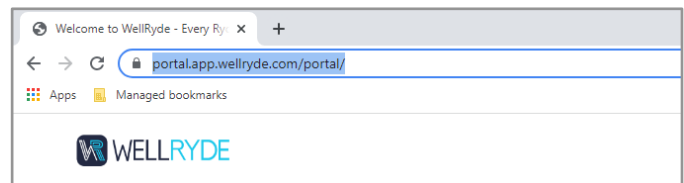
- [Navigating to the WellRyde Portal](#)
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- [Review Users detail](#)
- [Edit Existing Users and Manage their Record](#)
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Navigating to WellRyde Portal

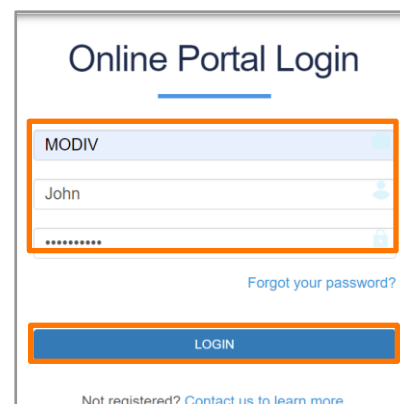
1. Navigate to :

<https://portal.app.wellryde.com/portal/> in your Google Chrome web browser, to access the WellRyde Dispatch Portal.

Note: If you currently do not have Google Chrome installed on your computer, it is recommended to download it as it is the preferred browser to access WellRyde.



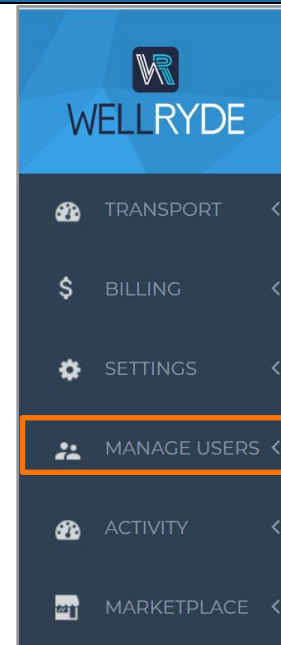
2. Enter your company code, username and password, all of which will be provided to you upon your first-time logging in. The company code and your username are not case sensitive, but your password is. Then, click **Login**.



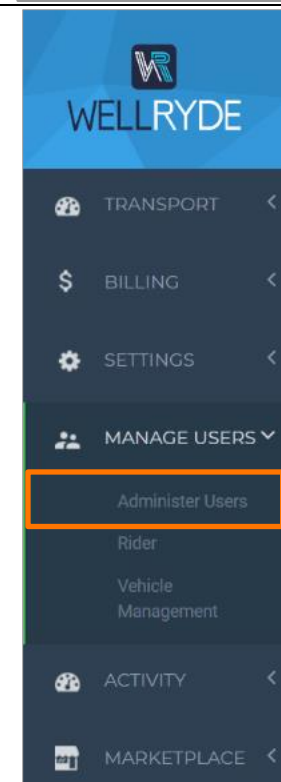
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Navigating to the Managing Users Tool

3. After logging into the Dispatch Portal, navigate to the left side toolbar and click on the Manage Users drop-down.



4. Click **Administer Users** and the Users screen will appear.



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Importing Users

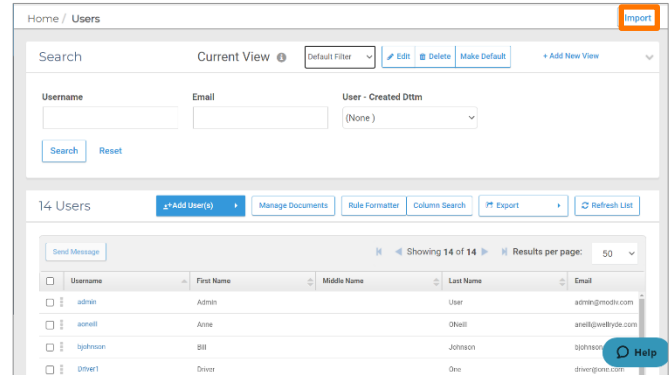
5. Click on the Import button to view all your credentialed drivers on the users list.

Note: You only need to import users when changes and/or updates have been made to a user's profile.

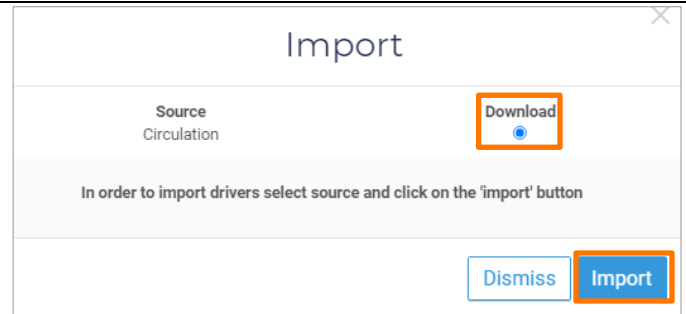
Common changes include:

- adding new credentialed drivers
- or, updating an existing driver's driver license information.

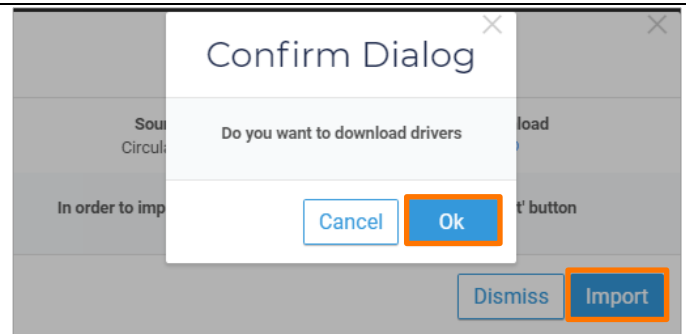
This ensures you have the most up-to-date information for all users within your organization.



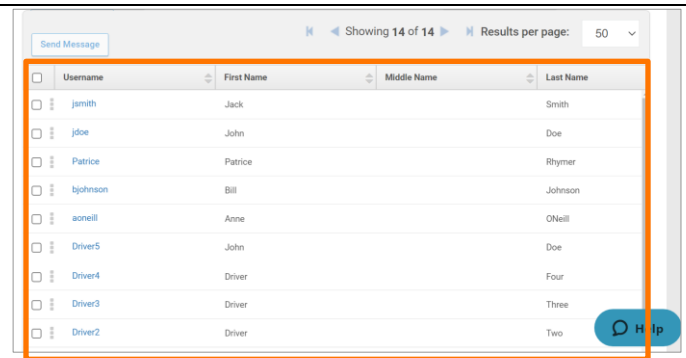
8. Click on the **Download** radio button next to the Circulation source. Then click **Import**.



6. Click **OK**.



7. You'll see an updated list of credentialed drivers on the users list.



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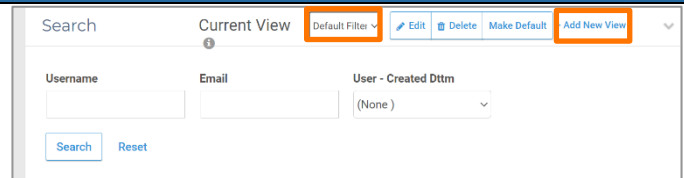
Filter the User List

8. After importing users, the **Administer Users** page provides you with a number of options to search, filter and view users.

The page will automatically default to the **Default Filter** view, which can be found at the top of the Users page and is the same for every new user in WellRyde and cannot be edited.

You also have the option to create a custom filter view and define the search criteria important to your organization. Creating custom filters helps to streamline your data, requires fewer keystrokes when searching and yields quicker search results.

To do so, click **+Add New View**



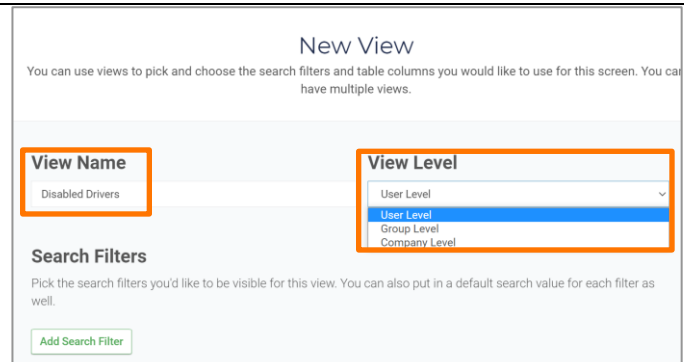
The screenshot shows the top of the 'Administer Users' page. At the top right, there are several buttons: 'Default Filter' (highlighted with an orange box), 'Edit', 'Delete', 'Make Default', and 'Add New View' (highlighted with an orange box). Below these are search fields for 'Username', 'Email', and 'User - Created Dttm' (set to '(None)'). There are 'Search' and 'Reset' buttons at the bottom left of the search area.

9. For example, if you want to create a specific view to see all disabled drivers, first give your new view a name.

10. Enter the name in the “**View Name**” field. In this case, we’ll call it “Disabled Drivers”.

11. Next, define the **View Level**, which designates who can see the view.

- **User Level** is specific to you,
- whereas company level allows everyone in your company to see this view.

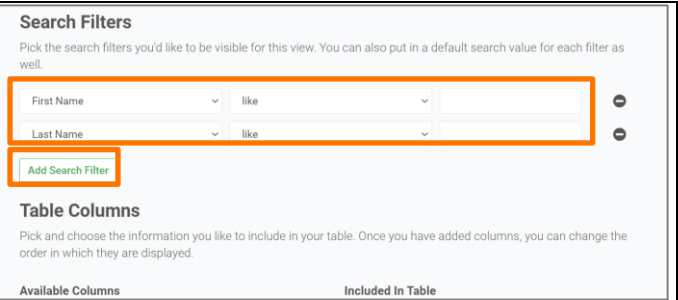


The screenshot shows the 'New View' configuration page. It has a title 'New View' and a subtitle 'You can use views to pick and choose the search filters and table columns you would like to use for this screen. You can have multiple views.' Below this, there are two main sections: 'View Name' and 'View Level'. The 'View Name' field contains 'Disabled Drivers' and is highlighted with an orange box. The 'View Level' dropdown menu is open, showing options: 'User Level' (highlighted with an orange box), 'User Level', 'Group Level', and 'Company Level'. Below these is the 'Search Filters' section with a subtitle 'Pick the search filters you'd like to be visible for this view. You can also put in a default search value for each filter as well.' and an 'Add Search Filter' button.

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12. Click **“Add Search Filter”** to select the specific data fields you’d like to be visible for this view in the Search box.

For our disabled drivers, we’d like to filter by first name, last name and user enabled.



Search Filters
Pick the search filters you’d like to be visible for this view. You can also put in a default search value for each filter as well.

First Name like

Last Name like

Add Search Filter

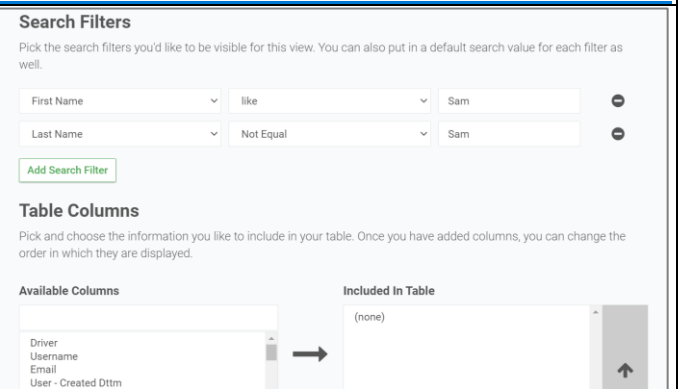
Table Columns
Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed.

Available Columns Included In Table

13. You can also put in a default search value for each filter as well by selecting an operator such as

- **“like”**
 - “Like” prevents you from having to type out an entire word.
- **“equal”**
 - “Equal to” provides an exact data match
- **or “not equal”.**
 - “Not equal to” is not exact.

For example, if the driver’s first name is Samantha, including a “Like” search value of “Sam” is an easy and quick way to generate results without having to search for the full name.



Search Filters
Pick the search filters you’d like to be visible for this view. You can also put in a default search value for each filter as well.

First Name like Sam

Last Name Not Equal Sam

Add Search Filter

Table Columns
Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed.

Available Columns Included In Table

Driver
Username
Email
User - Created Dttm

(none)

14. Finally, you’ll need to select table columns. They allow you to pick and choose the information you’d like to include in your user table.

For our Disabled Drivers, we’d like to see the driver’s username, first name, last name, email, if they are user-enabled, if their account is locked and the last known vehicle. To ensure these columns are included in the table, simply click on one available column category at a time, then click the right arrow to move it to the Included in Table column.

Repeat this process for each column you’d like to add. Use the up and down arrows on the right side of the

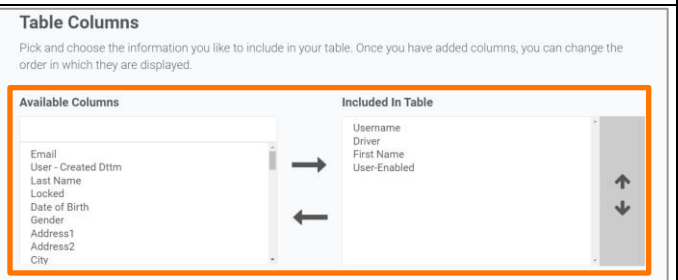


Table Columns
Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed.

Available Columns Included In Table

Email
User - Created Dttm
Last Name
Locked
Date of Birth
Gender
Address1
Address2
City

Username
Driver
First Name
User-Enabled

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<p>Included in Table box to change the order in which the columns appear.</p> <p>We recommend placing the most important columns at the top of the list for easier viewing access on the user table.</p>																			
<p>15. To save the new filter view you just created, click Save Changes.</p>																			
<p>16. After saving, you can easily apply the new view by clicking on the current view drop-down and selecting the new view's name.</p> <p>If you prefer to see this view all the time, make it your default view by clicking Make Default.</p> <p>If you need to edit a view...Click on the Edit button to do so, make your adjustments, and then click Save Changes to apply your changes.</p> <p>You can delete a custom view by clicking the Delete button.</p>																			
<p>17. After you've applied a view, use the search box to easily find the data you need.</p> <p>Enter your search in the designated boxes, then click Search to quickly generate results in the table below.</p> <p>For example, if we want to search for disabled drivers by the name of "Ryan", we can type "Ry" into the username field, click Search and find Ryan quickly.</p>	<table border="1"> <thead> <tr> <th>Username</th> <th>First Name</th> <th>Last Name</th> <th>User-Enabled</th> <th>Locked</th> <th>Driver's License</th> </tr> </thead> <tbody> <tr> <td>ryan.doe@none.com</td> <td>Ryan</td> <td>Doe</td> <td>✓</td> <td></td> <td>CD-13346</td> </tr> <tr> <td>Ryan</td> <td>Ryan</td> <td>Gauvin</td> <td>✓</td> <td></td> <td>R07272</td> </tr> </tbody> </table>	Username	First Name	Last Name	User-Enabled	Locked	Driver's License	ryan.doe@none.com	Ryan	Doe	✓		CD-13346	Ryan	Ryan	Gauvin	✓		R07272
Username	First Name	Last Name	User-Enabled	Locked	Driver's License														
ryan.doe@none.com	Ryan	Doe	✓		CD-13346														
Ryan	Ryan	Gauvin	✓		R07272														

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18. To search specific data, use **Column Search**.

When clicking on this button, a search field will appear for each column shown.

Type in what you're searching for and hit enter to narrow your search results.

Note: To organize your user list by last name from A to Z, click on the up arrow in the last name column to do so.

19. To export an item from the Dispatch Portal, click the **Export** button.

This triggers a drop-down list to appear.

Search Current View Active_Users Edit Delete Make Default + Add New View

Username First Name Last Name User-Enabled Is True

ry

Search Reset

2 Users +Add User(s) Manage Documents Rule Formatter Column Search Export Refresh List

Send Message Showing 2 of 2 Results per page: 50

Username	First Name	Last Name	User-Enabled	Locked	Driver's License
ryan.doe@none.com	Ryan	Doe	<input checked="" type="checkbox"/>		CD-1334a
Ryan	Ryan	Garwin	<input checked="" type="checkbox"/>		HD7272

Search Current View Default Filter Edit Delete Make Default + Add New View

Username Email User - Created Dttm (None)

Search Reset

15 Users +Add User(s) Manage Documents Rule Formatter Column Search Export Refresh List

Send Message Showing 15 of 15 Results per page: 50

Username	First Name	Middle Name	Last Name	Email	User-Enabled	Locked	Credentialing Stat...	Loc...
ryan.doe@none.com	Ryan		Doe	ryan.doe@none.com	<input checked="" type="checkbox"/>			
janeth	Jack		Smith	janeth@wellryde.com	<input checked="" type="checkbox"/>			
jdoe	John		Doe	jdoe@wellryde.com	<input checked="" type="checkbox"/>			
Patrice	Patrice		Rhymer	Patrice.Rhymer@...	<input checked="" type="checkbox"/>			
Johnson	Bill		Johnson	bjohnson@wellryde...	<input checked="" type="checkbox"/>			

Search Current View Default Filter Edit Delete Make Default + Add New View

Username Email User - Created Dttm (None)

Search Reset

15 Users +Add User(s) Manage Documents Rule Formatter Column Search Export Refresh List

Send Message

Username	First Name	Middle Name	Last Name	Email	User-Enabled	Locked
ryan.doe@n...	Ryan		Doe	ryan.doe@none.com	<input checked="" type="checkbox"/>	
jdoe	John		Doe	jdoe@wellryde.com	<input checked="" type="checkbox"/>	

Search Current View Default Filter Edit Delete Make Default + Add New View

Username Email User - Created Dttm (None)

Search Reset

15 Users +Add User(s) Manage Documents Rule Formatter Column Search Export Refresh List

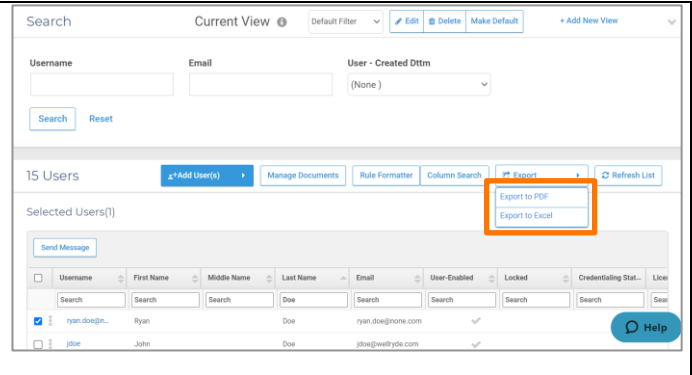
Selected Users[1]

Send Message

Username	First Name	Middle Name	Last Name	Email	User-Enabled	Locked	Credentialing Stat...	Loc...
<input checked="" type="checkbox"/>	ryan.doe@n...	Ryan	Doe	ryan.doe@none.com	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	jdoe	John	Doe	jdoe@wellryde.com	<input checked="" type="checkbox"/>			

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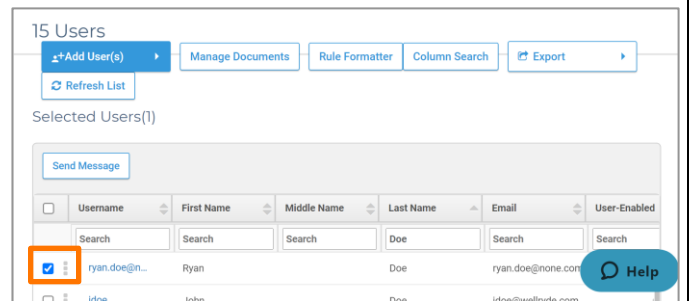
Note: You can either export the list to PDF or to Excel and save it to your computer for your records.



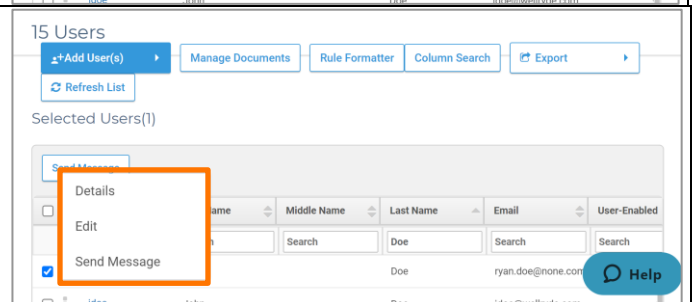
Review User Detail

20. To view details for a specific user, search for or find the individual's name within the user list.

Next, you can either click on their username or the three vertical dots next to their username.



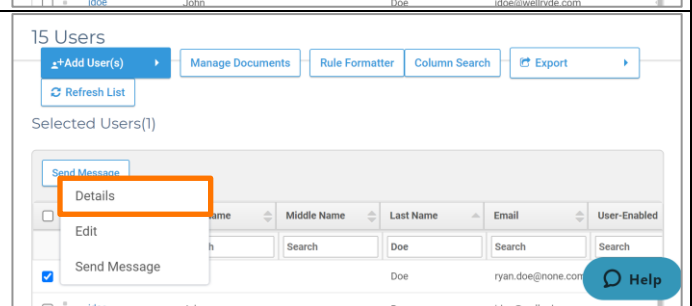
21. When clicking the 3 vertical dots, the menu option will appear.



22. Select Details on the menu

Note: A user's profile page provides additional insight into their assigned roles, details, message history and login history.

- Message history displays messages to the user from the Dispatch Portal,
- while the login history displays every instance the user has logged into the Dispatch Portal within the last 7 days.



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Edit Existing Users and Manage their Record

23. To edit and manage a user's profile page click **Edit Profile**

Home / Users / Ryan Doe

Ryan Doe

Created On Sat, Jul 17 2021 at 16:18:52

Edit Profile

Details

Username	ryan.doe@none...	Vehicle identification number (VIN)	G48MWAUDI07TESLA1
Password	*****	CDL Number	CD-1334s
Email	ryan.doe@none...	License Authority	
User Phone Number	555-555-5555	License State	
Practice		License Expiration Date	
SSN	222222222	Password Never Expires?	no
Date of Birth	Wed, Jul 12 1944	Account Locked?	no
Gender	Male	Unable to use app?	no
Address1			

Help

24. To unlock a user's account and reset their password, first navigate to "Account Locked" toggles to turn it from on to off, then click **Save Changes**.

For example, if you wanted to change a driver's last name from Forester to Johnson, do so in the last name field.

If the user role is a driver, include the user's Driver's License Number (this will go in the CDL Number data field), License State and License Expiration Date.

Note: These changes must be saved first before assigning a user a driver role.

Then, ensure all other fields containing a red asterisk are filled in, and click Save Changes to update the record.

Home / Users / Edit User

Save Changes **Cancel**

First Name * Ryan

Middle Name

Last Name * Doe

Username * ryan.doe@none.co **Change**

Password * ***** **Change |**
Reset

Email * ryan.doe@none.com

User Phone Number 555-555-5555

Practice --None--

SSN 222222222

Profile Picture **Change**

Vehicle identification number (VIN) G48MWAUDI07TESLA1

CDL Number CD-1334s

License Authority

License State

License Expiration Date mm/dd/yyyy

Password Never Expires? **off**

Account Locked? **off**

Unable to use app? **off**

Help

Password Reset Instructions

25. To reset a user's password. Click **Edit Profile** again and click Change next to the Password field.

Note: A password must be 8 characters in length, is case sensitive and cannot contain any special characters or numbers. After designating a new password, click Save Changes again.

Home / Users / Edit User

Save Changes **Cancel**

Edit Profile

* Indicates required details

First Name * Ryan

Middle Name

Last Name * Doe

Username * ryan.doe@none.co **Change**

Password * ***** **Change |**
Reset

Email * ryan.doe@none.com

Profile Picture **Change**

Vehicle identification number (VIN) G48MWAUDI07TESLA1

CDL Number CD-1334s

License Authority

License State

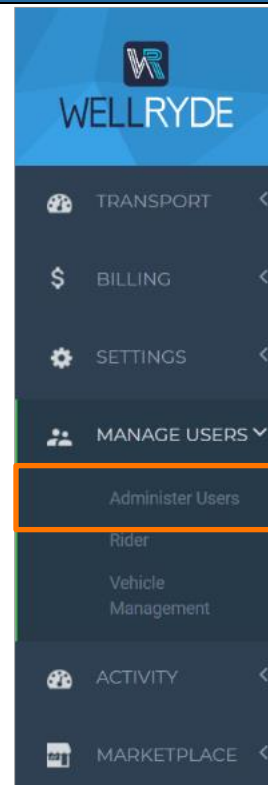
Help

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Add a New User

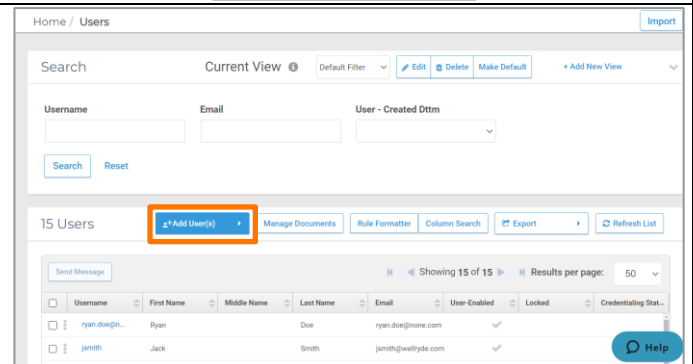
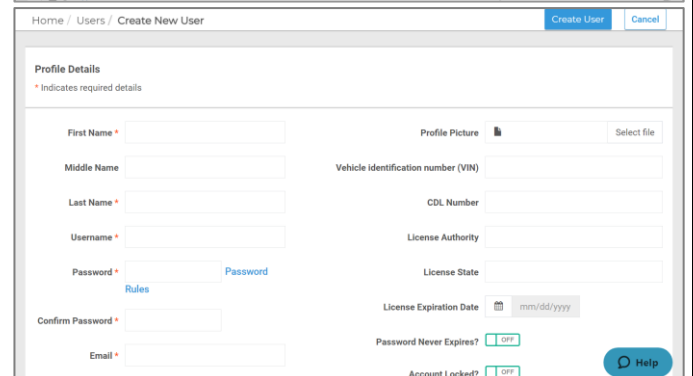
26. To add a new user to the Dispatch Portal ensure you are on the **Administer Users** page within **Manage Users**.

Note: Imported users are typically only Modivcare credentialed drivers.



27. Click **+Add User(s)**, then **Create New User**.

Note: When creating a new user for an Admin, fill in all fields with a red asterisk under the profile details.

Profile Details
* Indicates required details

First Name * Profile Picture

Middle Name Vehicle Identification number (VIN)

Last Name * CDL Number

Username * License Authority

Password * Password License State

Confirm Password * License Expiration Date

Email * Password Never Expires? OFF

Account Locked? OFF

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28. Scroll down to assign user’s role(s).
Select the role and click on the arrows to assign specific User Roles.

Click the **Create User** button

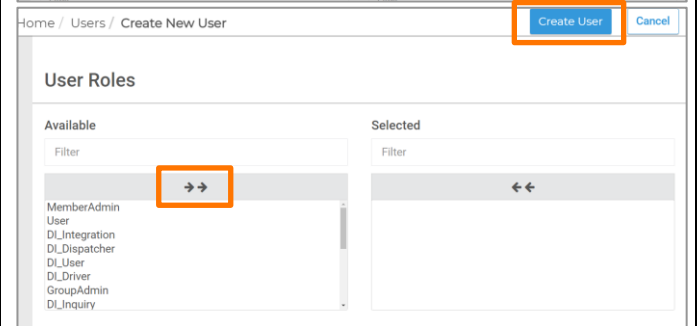
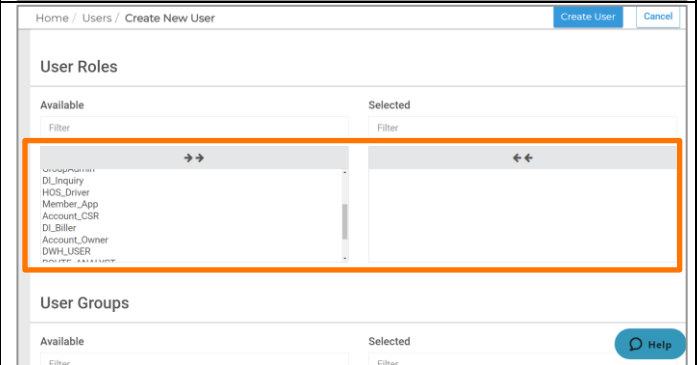
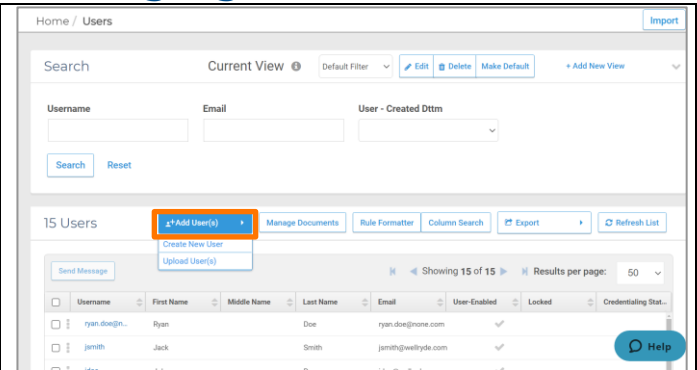
Note: Roles determine what access a user has to WellRyde.

There are 7 unique roles a user can be assigned to. Users can be assigned multiple roles at once if they will serve multiple functions within your organization.

- **Member Admin**- Allows the user to add/maintain users and vehicles within WellRyde.
- **DI_Integration**- Allows the user to perform integration with designated broker systems.

For example, this role allows the connection between Circulation and WellRyde.

- **DI_Dispatcher**- Allows the user to assign trips to a Driver’s WellRyde Mobile App
- **DI_Driver**-Allows the user to access the WellRyde Mobile App to perform trips.
- **DI_User**- Allows the user member admin access.
- **DI_Biller**- Allows the user to perform extensive billing functions.
- **Account Owner**-Allows the user to subscribe to add-on modules and



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purchase additional features within WellRyde.

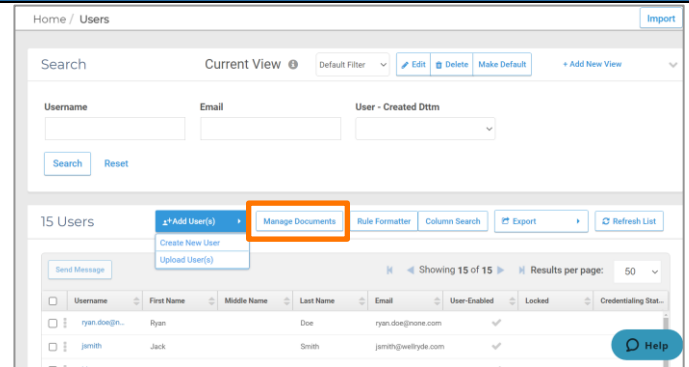
Manage Users' Documents

29. To save captured documents to store against a driver or dispatcher's record, use the **Manage Documents** function to do so.

Note: Navigate back to **Administer Users** and then click **Manage Documents**.

This allows your Admin to predefine required documents to be stored in the user's profile including:

- CPR certification
- driver's license
- COVID certification
- PPE certification



30. You can make the document mandatory or optional for each user, then click **Save**.

Note: When a document is deemed mandatory, you cannot **Save Changes** unless all the information is filled in.

