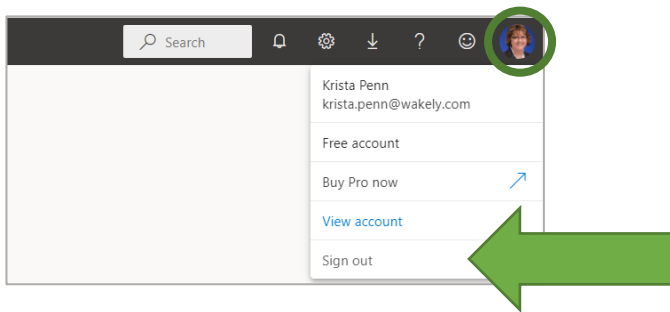


WakelyBCS Market Insights Benchmarking Solution

Demo Login Instructions - Benchmarking Dashboard & Plan Summary Report

Last Updated: March 30, 2022

1. Open your internet browser of choice. The dashboard and Plan Summary Report look best when you use Microsoft Edge as your internet browser. However, you can access the dashboard from other popular browsers like Google Chrome, Microsoft Internet Explorer, and Firefox.
2. If you have opened Microsoft Edge and it is not the browser you typically use, copy the following link into the search bar of your Microsoft Edge browser session. Otherwise, navigate to the Microsoft Power BI service login page by clicking on this link: <https://app.powerbi.com/home>.
3. Make sure you are logged out of Microsoft using your personal or work email. To do so, click on the profile icon in the upper right-hand corner of your screen and select "Sign Out."



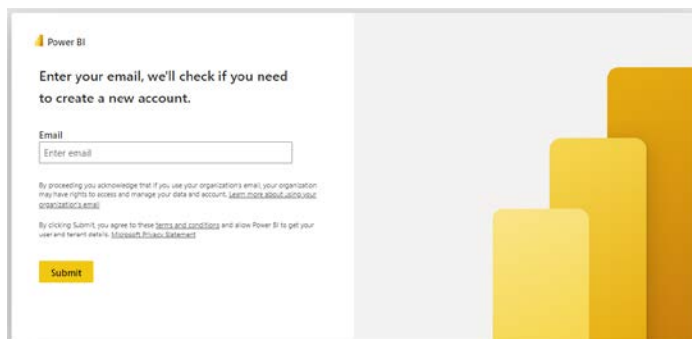
- a. NOTE: the profile icon may not include an uploaded photo. If it doesn't, the profile icon will look like this:



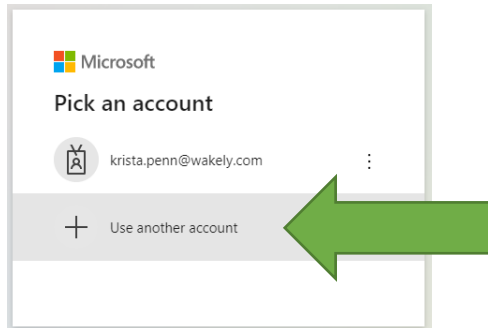
4. Is this your first time logging in to the view the dashboard?

- a. If yes:

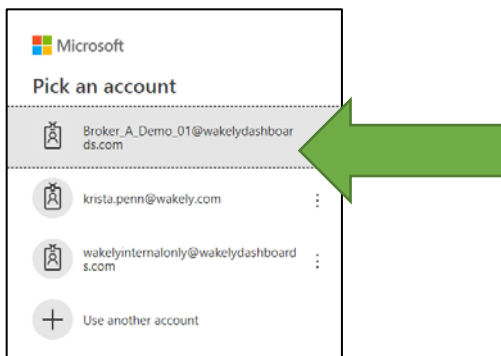
- i. You may receive the following popup window asking you to verify that your account exists. Enter the username "**Broker_A_Demo_01@wakelydashboards.com**" and click on the "Submit" button.



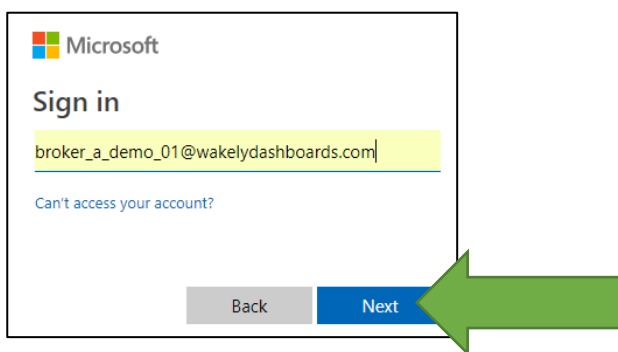
- ii. Alternatively, select the “Use another account” option. Go to Step 5.



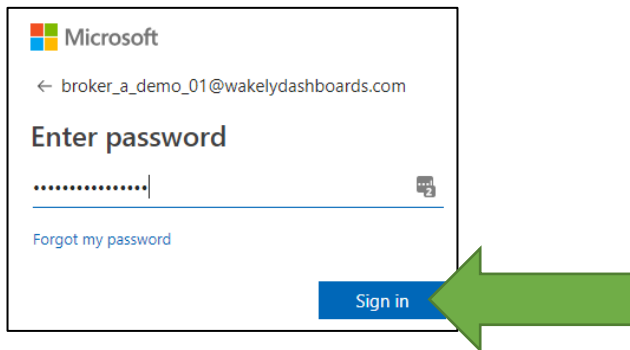
- b. If no, select the “**Broker_A_01@wakelydashboards.com**” username from your list of available accounts. Go to Step 6.



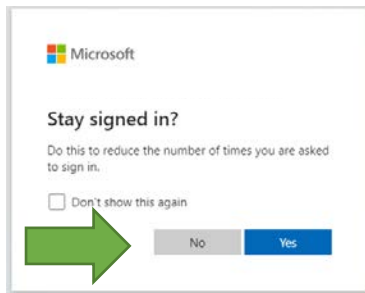
- 5. Enter the username “**Broker_A_Demo_01@wakelydashboards.com**” and click “Next.”



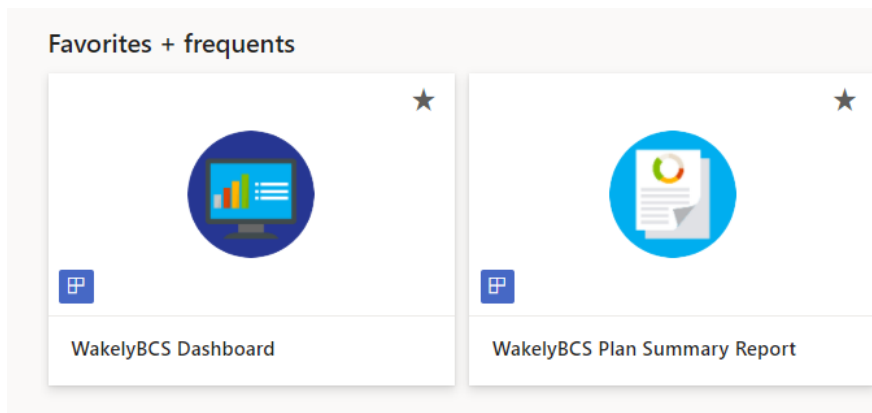
6. Enter the password “**BenchmarkDemo_01**” and click “Sign in.”



- a. You may get an alert prior to signing in asking you whether you want to stay signed in. If your organization uses Microsoft 365, Wakely recommends you select “No” to avoid confusion, since you will typically use Microsoft 365 with your work email.



7. You will be directed to the Power BI Portal home screen. Click on the “WakelyBCS Dashboard” or “WakelyBCS Plan Summary Report” app, depending on which report you would like to view.



Important Notes


1. All data in the demo data set is fictitious and only includes employer groups in California, Colorado, Georgia, Iowa and New York.

2. WakelyBCS Dashboard

- a. In the WakelyBCS Dashboard app, you will be directed to the Terms and Conditions page of the dashboard. After reviewing, navigate to the Home Page where you will select benchmarking filters by clicking on the “Show Filters” button.



3. Plan Summary Report

- a. Benchmarking filters are accessed by clicking on the filter icon in the upper right hand corner of each page to open the Benchmarking Filter Pane. 
- b. In order to pull in the demo benchmarking data into the Plan Summary Report, you will need to open up the Benchmarking Filter Pane as described above and set the Benchmarking Data Toggle to “All Participants – Demo”, as shown in the first screenshot below. Once you make this switch, the report will populate with benchmarking data, as shown in the second screenshot.

