



# empulse Employer finger on the pulse

*empulse* Web Workbench User Guide



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# Introduction

The purpose of this guide is to help you, our customer, to use the *empulse* Workbench / Dashboard.

The Web Workbench is a web application accessible through your browser from any device. It is the platform for publishing all types of messages, managing the system and reviewing the dashboard (data from the *empulse* Client).

It will be accessible by a URL which will be provided by your empulse System Administrator.

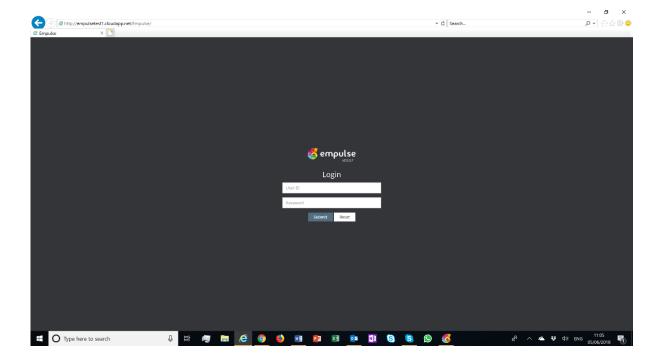
This guide includes the following information:

- 1. General Overview
- 2. The Dashboard Analysing data
- 3. Sending and managing messages, quick polls and alerts
- 4. Managing and creating subscriptions
- 5. Managing User Roles
- 6. Managing Widgets
- 7. Managing the Admin



# **Getting Started**

When you begin, you will come to the *empulse* login page. You can use your Single Sign On details to login.





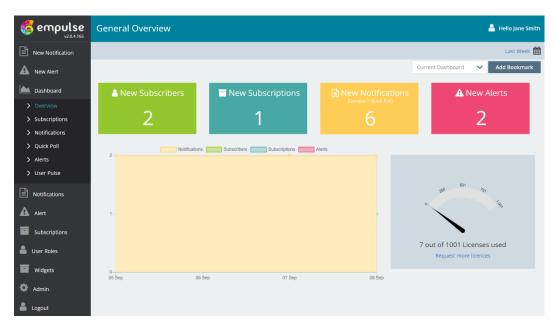
# **Dashboard**

The Dashboard is where Analytics received from the *empulse* client(s) are published. The analysis and information reporting provided by the *empulse* product is powerful and can be used to improve communications within an Enterprise. However, customers can extract maximum value from the *empulse* database by downloading the information into their business intelligence capabilities. This helps you gain deeper data insight.

### Overview

When you first enter the *empulse* workbench it will show you the Dashboard overview window. This tells you the following:

- Licenses How many licenses have been used this is to show consumption of licences against the number of licences purchased
- New Subscribers these are users that have subscribed to one of your Subscriptions.
- New Subscriptions these are any new Subscriptions (Communication Channels) that have been created within *empulse*.
- New Notifications these are messages or quick polls that have been sent. (Quick Polls are
  messages that include a one-off question that the user can answer with a thumbs up or
  thumbs down, i.e How was your IT service today?)
- New Alerts Emergency Alerts are real-time notifications that can't be ignored and help to keep your employees informed about any emergencies that may arise. They will take over the screen and will not shut down until the person does this manually to make sure they have read it. Alerts can also have an associated SMS text message.



The image above is the Dashboard overview screen. By default it tells you what has been happening in the **last week** to ensure you have visibility of the latest information. However you can change the dates you would like to see the statistics for when you

corner.

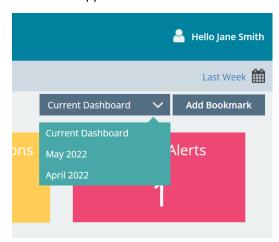




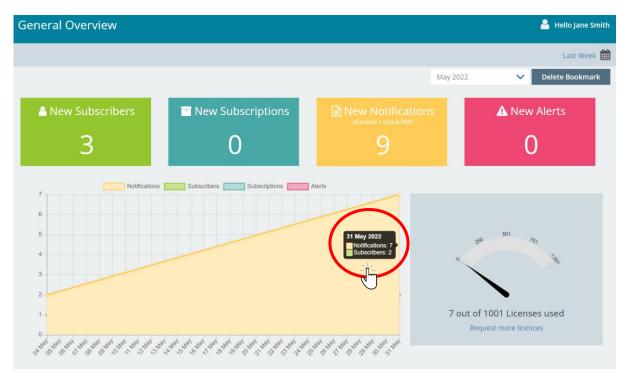
If there is a certain time frame you would like to see regularly, such as 'last week' 'last month' or a specific date range, you can create a 'Bookmark'. To do this, click on the dates (start date and end date) that you would like the data for then click on 'Add Bookmark', create a name for your bookmark and then click 'add'.



It will then appear in the 'Current Dashboard' drop-down box for you to choose at any time.

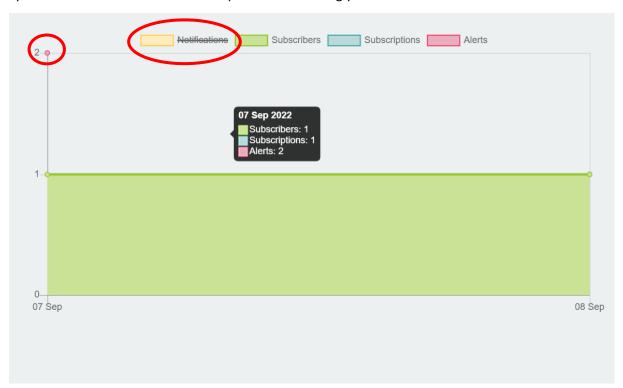


If you hover over the graph it will bring up the specific data of the Notifications sent and the number of new Subscribers there were on a certain date.





Throughout the Dashboards, you can toggle options to show or hide the details of specific metrics. For example, in the image below, the 'Notifications' metrics have been 'unselected' (indicated by the strikethrough on the metric title). The graph now only shows Subscribers, Subscriptions and Alerts metrics. By toggling and reviewing the graph you can quickly home in on the metrics that matter to you. Note the little red dot in the top left. This is telling you the number of Alerts sent.



Another example, below, shows 'Notifications' and 'Subscribers' toggled off, leaving just the results from the Subscriptions and Alerts. The graph shows 2 dots, a red one on 7<sup>th</sup> September and a blue dot on 8<sup>th</sup> September. This indicates that 2 alerts were sent on 7<sup>th</sup> September, but none were sent on the 8<sup>th</sup> hence there is no red graph line for Alerts. Similarly, the blue dot on the 8<sup>th</sup> September indicates a new subscription was created only on that date and no new subscriptions were created on the 7<sup>th</sup> hence there would be no graph line to show any trends between these 2 dates. The Dashboard not only allows you to see the results, but also helps you to visualise trends.

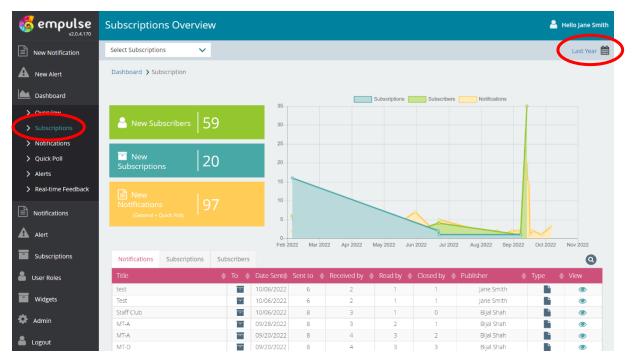




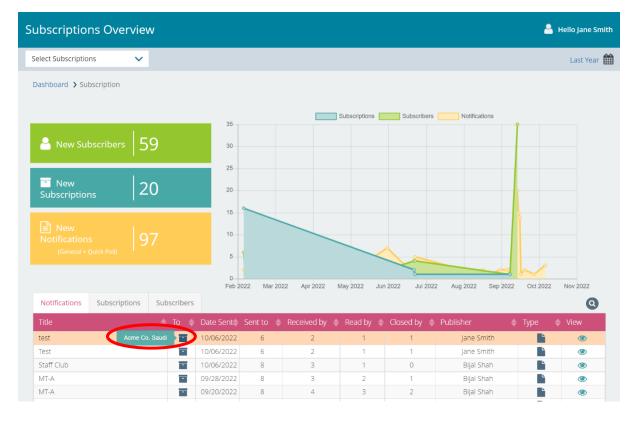
# **Subscriptions**

Subscriptions are the Communication Channels within empulse.

When you click on the Subscriptions option under the Dashboard menu, you will see a more detailed overview of the Subscription information. By default, it will show you results from the 'last week', but you can change that on the calendar icon at the top right of the page (same as in the overview previously).

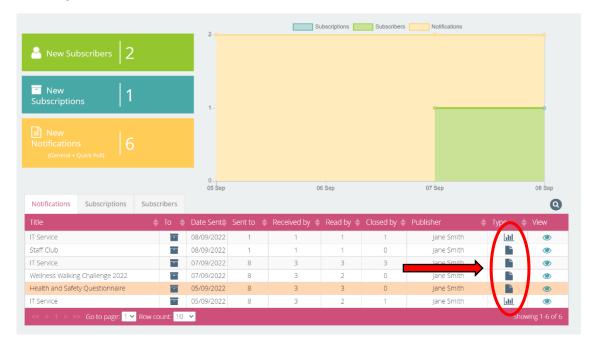


There is an overview at the bottom of the page detailing Notifications, Subscriptions and Subscribers. Hover over the icon under the 'To' field to see who the notification was sent to. (This hover feature works similarly throughout the workbench)

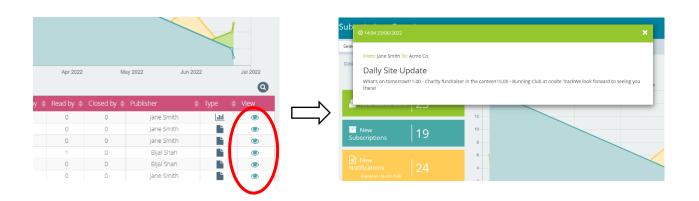




Under 'Type' the 🔟 icon means it was a quick poll that was sent, and the 🖺 icon means it was a general message.

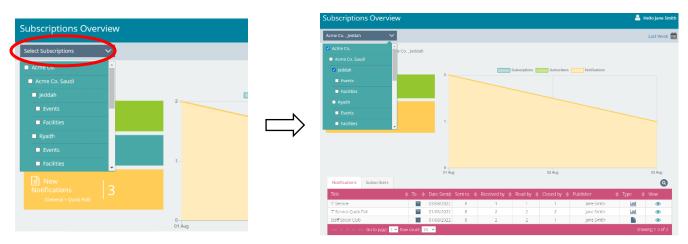


If you want to have a quick look at the message that was sent, then you can click on the icon and it will look like the example below. Clicking this icon throughout the workbench will show further details of the message sent.

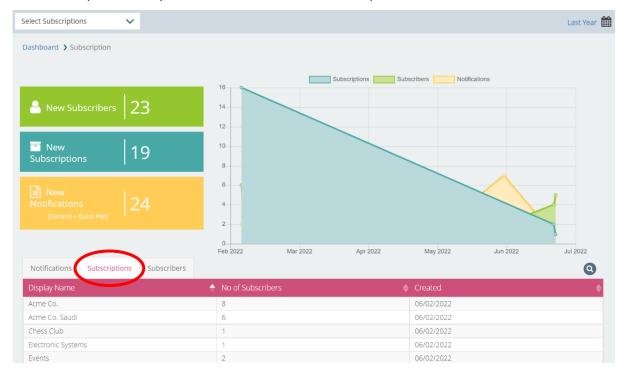




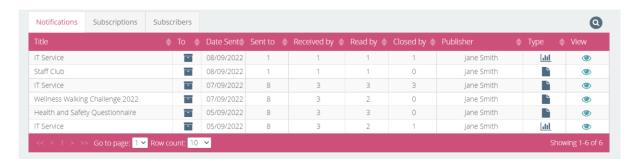
You can choose which subscription (or multiple) you would like to investigate in more detail.



When you click on the 'Subscriptions' option you will see the graph below that focuses on the Subscription analysis. The table below the graph tells you the number of subscribers you have in each Subscription and if you click on 'Subscribers' it will tell you who those subscribers are.



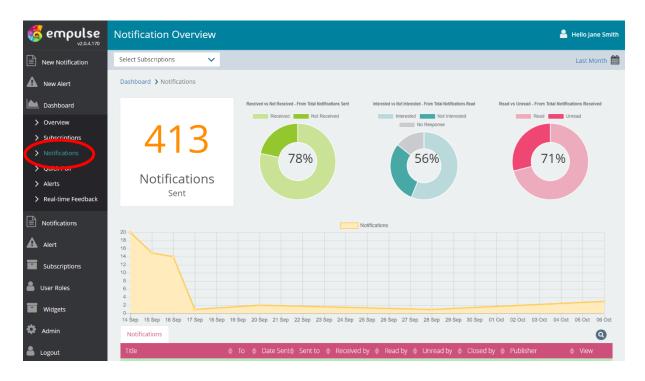
At the bottom of the table you can use the 'Go to page' option if there is more than one page, and you can choose the 'Row count' option to see more or less rows.



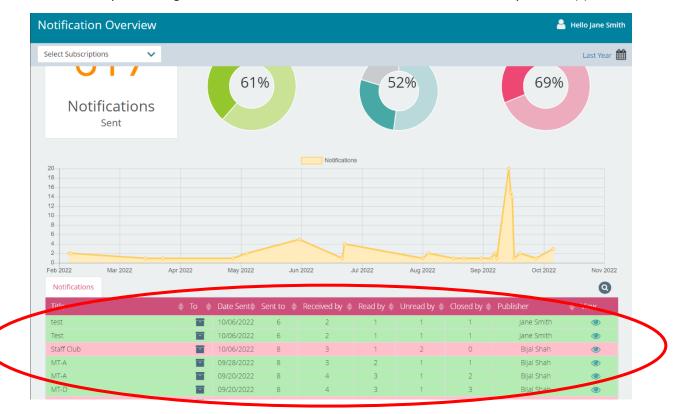


### **Notifications**

Click on the 'Notifications' option in the left-hand menu and it will show you statistics relating to the notifications that have been sent. Similar to the subscriptions, it will default to the 'last week', however you can change this. In the top left-hand side, it will show you the total number of Notifications that have been sent – for instance if there have been 8 notifications sent to 10 people, this number will show 80. You will see there are percentages shown ~(the lighter, detailed in the labels above them.



The information highlighted in red in the table below means notifications have been received by users but not yet read – green means notifications have been received and read by the user(s).





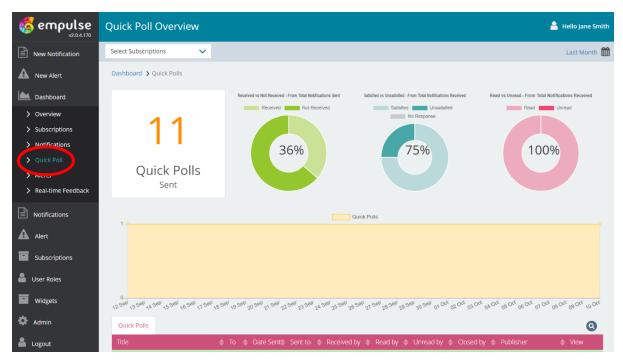
If you hover over the circles, it will show even more detail, for instance it will tell you the number of messages received / not received (not received means the 'Client' Application wasn't open on the computer for them to receive it).



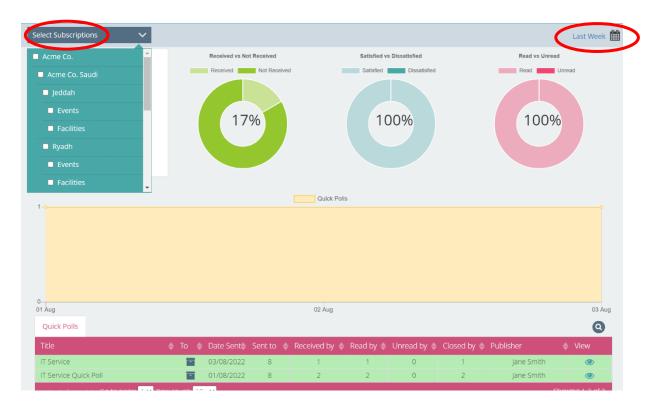


## **Quick Polls**

Click on the 'Quick Polls' option in the left-hand menu and it will give you all the statistics of the quick polls that have been sent in the last week. (Quick Polls are messages that include a one-off question that the user can answer with a thumbs up or thumbs down, e.g. How was your IT service today?)



You can select which subscription you would like to look at as well as the dates they were sent.

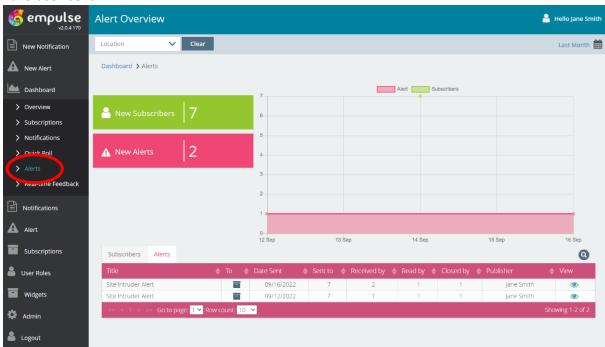




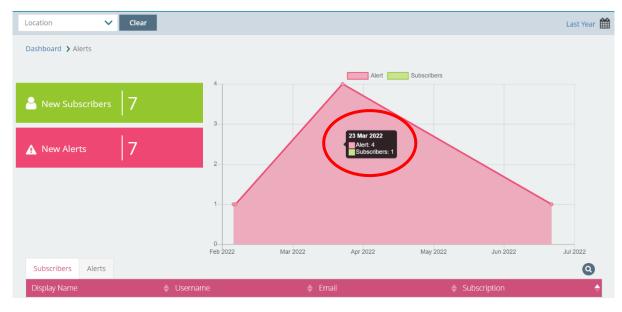
### **Alerts**

Alerts are real-time notifications that can't be ignored and are intended to keep your employees informed about any emergencies that may arise, such as intruder alerts or severe weather warning updates. Alerts can even reach employees away from their desk by sending critical messages to their mobile phone via SMS.

Click on the 'Alerts' option in the left-hand menu and it will show you the statistics of the Alerts that have been sent.



If you hover over the graph it will show more details of the Alerts sent and Subscribers they were sent to.



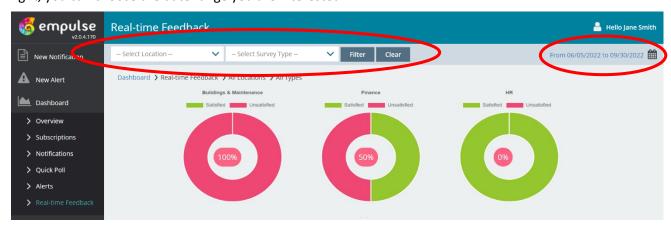


### Real-time Feedback

Real-time Feedback is a form of quick / short survey. It gives the user the opportunity to feedback to *empulse* Administrators that they are happy or unhappy about something. The way the User does this is by going to the Real-time Feedback widget in the *empulse* client. There they will see a drop-down list of items defined by the enterprise and configured by the *empulse* admin team. The user will select the item they wish to give feedback on and then click on either the happy or sad face. This information is then fed back to the Dashboard which will display this information by location, and/or the listed items from the drop-down list in the *empulse* client widget. This facility offers the business the ability to capture and monitor real-time feedback on items specified in the list. This will enable the business to quickly identify things that users are happy with or unhappy with and target the appropriate actions.



You can filter the Location or the Survey Type at the top. If you click on the calendar on the top right, you can choose the date range you are interested in.





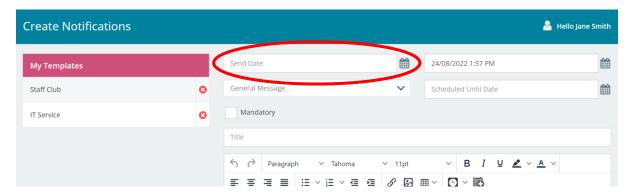
If you hover over one of the circles it will give you details of how many users were satisfied with that department. The green means satisfied and red means unsatisfied.



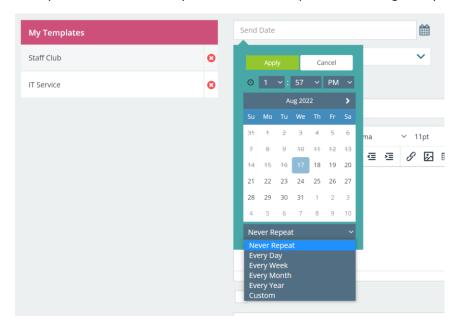


# **Creating Notifications**

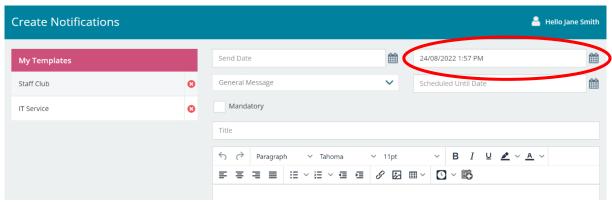
To send a new notification to users you can either choose the first option at the top that says 'New Notification' or use the option underneath the 'Notifications' option. Once you are in the New Notification screen you will see a box that says, 'Send date', here you are able to choose a future date to send the message or if you just leave it blank then it will send immediately.



Here you can also choose if you would like to repeat this message Daily / Weekly etc...

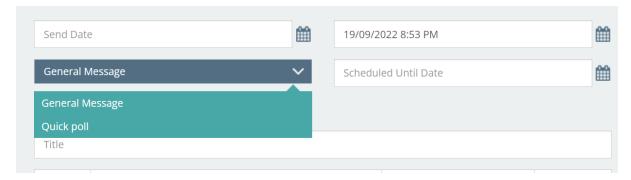


The box next to it is the date you would like the message to expire, this is automatically set for a weeks' time from when the message was sent but you can alter this.

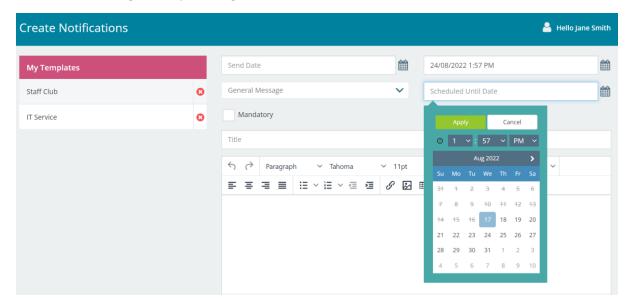




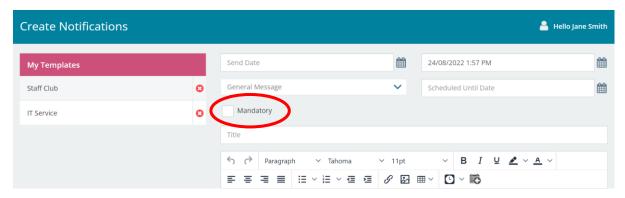
You have the choice of sending either a General Message or a Quick Poll, make sure you choose the right option for type of message you are sending.



The 'Scheduled until date' box is for if you have chosen to repeat the message, you can choose a date for the message to stop sending.



Click on the 'Mandatory' box if it is a message of importance that you would like everyone to read. It will automatically go to the top of their message queue, and they won't be able to delete it until it has been opened/read.



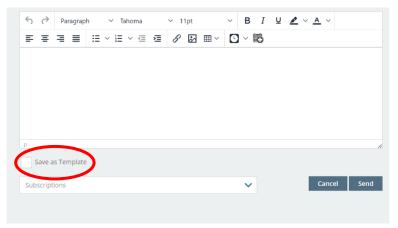




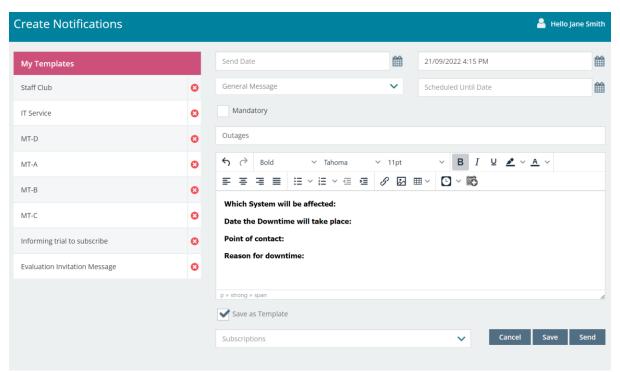
Once you have filled out your message as normal, you can click on  $\mathscr{O}$  to insert a web link, click on to insert an image, click on  $\boxplus$   $\vee$  to insert a table. To insert the date and/or time click on  $\boxdot$   $\vee$  and to create a new meeting click on  $\boxdot$ 

You can save any of your messages as templates for future messages by just ticking the 'save as

template' box.

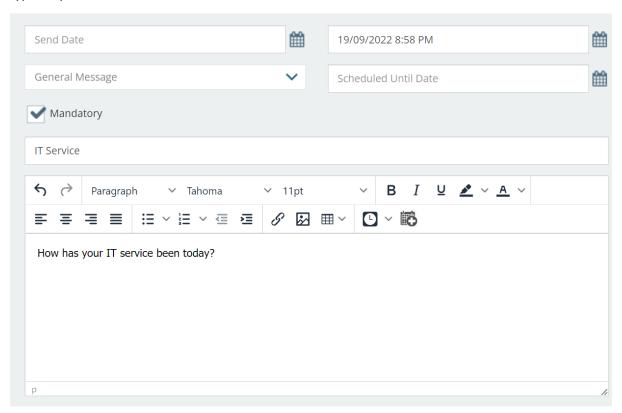


You can set templates so that they are easy for users to fill out, please see the example below.

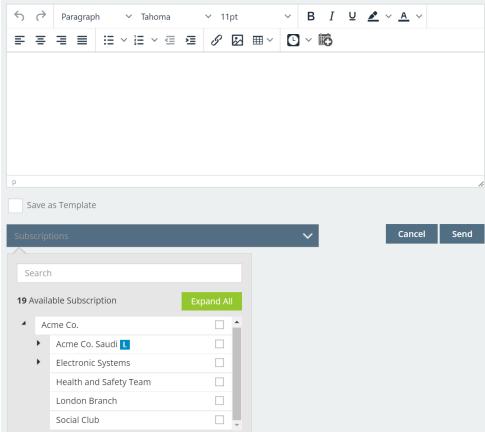




If you want to send a quick poll, make sure to ask a simple question as the user will only be given two options to answer this, a thumbs up or thumbs down so you need to make sure it is a 'Yes or No' type of question.



Lastly, select which subscriptions you would like the message / quick poll to be sent to. You can choose multiple subscriptions if you like.

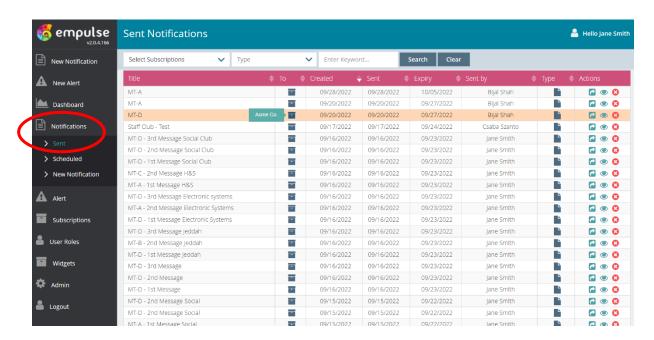




# **Managing Notifications**

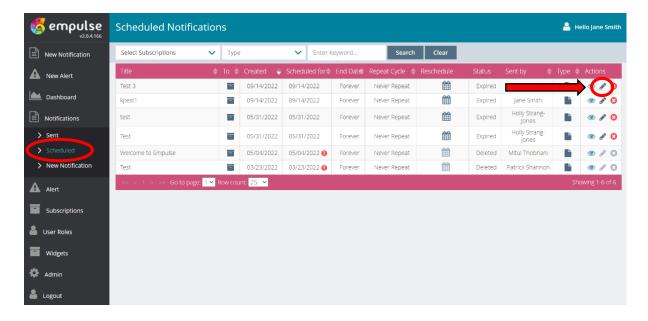
To look at the Notifications in more detail go to the Notifications option in the menu. You will need to choose Sent or Scheduled.

When you click on Sent the screen below will come up with all the details of the sent Notifications.



Once in this screen you can click on the to copy the message and forward it on. If you click on it will let you see a copy of the message that was sent. If you click on the this will recall and delete the message that was sent.

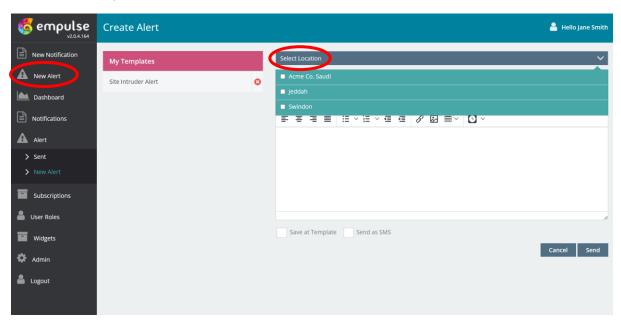
You can then look at the Scheduled Notifications (messages that are to be repeated or sent out in the future). If you click on the 
you can edit the message before it goes out.



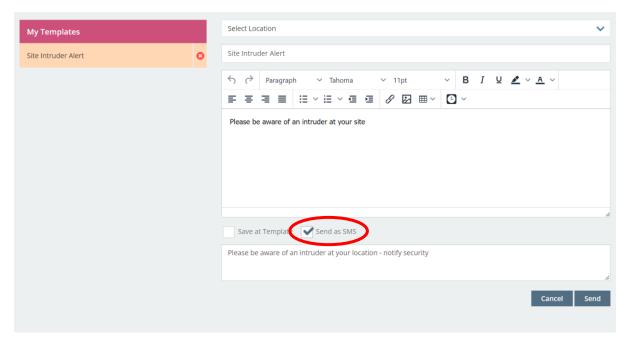


# **Creating Alerts**

To send a new Alert go to the 'New Alert' option on the menu bar and select the location/s you would like the Alert to go to (to send to everyone click on all locations). It will immediately be sent to all the computers in those locations and will stay on the user's screen until they close the message to make sure they have read it.

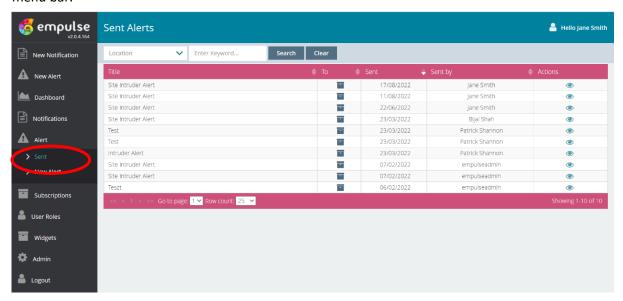


The message format is the same as for the notifications, and you can also save them as templates for quicker sending in the future. You can also send as an SMS so each user receives the message on their mobile phone.

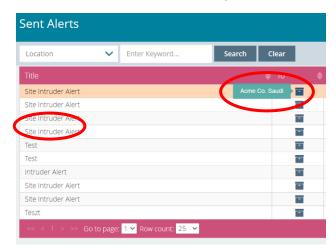




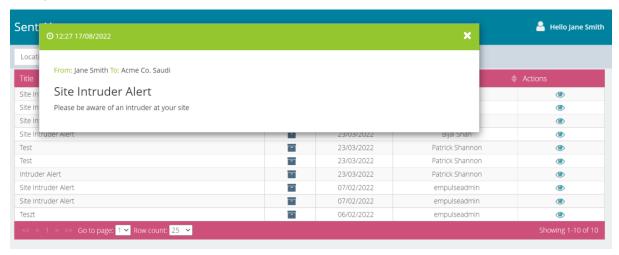
If you want to see what Alerts have been sent just click on the 'Sent' under the Alert option on the menu bar.



To show who the Alert was sent to just hover over the



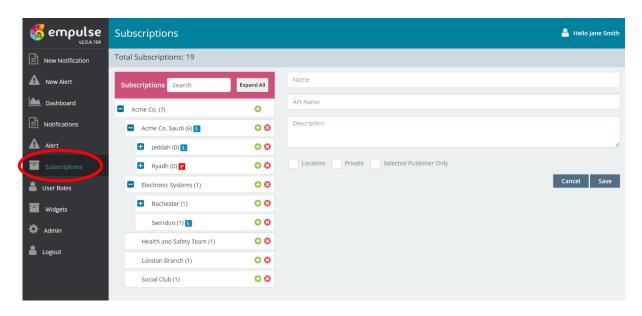
If you want to see the text of the Alert that was sent, click on the <a> and it will show the details of that specific Alert.</a>





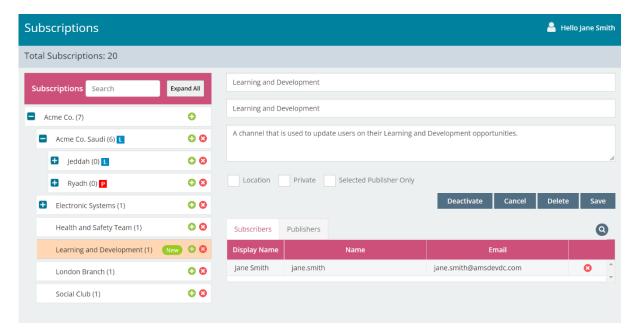
# **Creating Subscriptions**

Subscriptions are the 'Communication Channels' that users subscribe to. Navigate to the Subscriptions option in the menu bar to manage them.



To create a new Subscription, first decide whether you would like it under a Subscription that already exists, if you do then click on the green plus next to it and it will add your new one into that group. If you want to create a new one, just start typing out the information on the right-hand side in the blank boxes (leave the API box blank as this will auto-populate), and then click save and it will automatically save under your top Subscription (in this case, Acme Co.) When creating a new Subscription you can tick whether it is a Location, Private group (only specific users are invited to see this group) or Selected Publisher only (you can specify who is allowed to publish to this subscription). Once created it will come up with a 'New' sign next to it. To delete a Subscription just click on the red cross next to it, it will ask you to confirm this action just in case you clicked on it by accident.

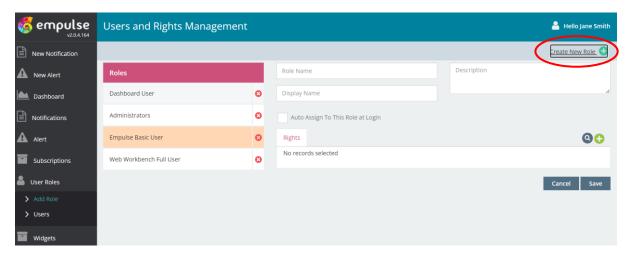
When looking at the existing subscriptions you can tell which type it is by the icon next to it, the ones with mean they are a 'location' for example 'Tower 1 Floor 1' or 'Tower 1 Floor 2'. The ones with mean they are private subscriptions that only those specifically invited to can see.



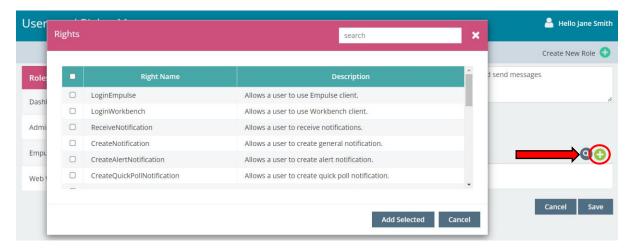


# **User Roles**

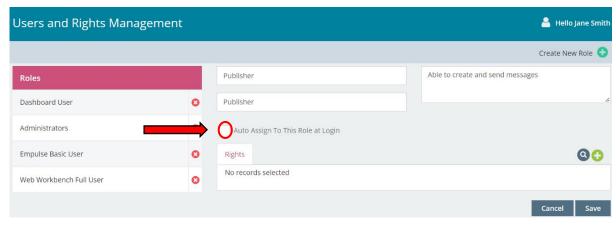
User Roles and rights management is where you manage the rights and permissions of each user. Every user will be automatically assigned a Basic empulse User role (this role does not need access to the dashboard) or other roles provide various permissions to use the Dashboard. You can create a new role on the right-hand side of the screen. More details on this can be found in our supporting document 'Web Workbench Initial Setup'.



You can choose a multiple of rights for each new role you create.



If you have a general user role that you would like to assign to all users, then click the 'Auto Assign' box and then when the users first login they will automatically be assigned this role.

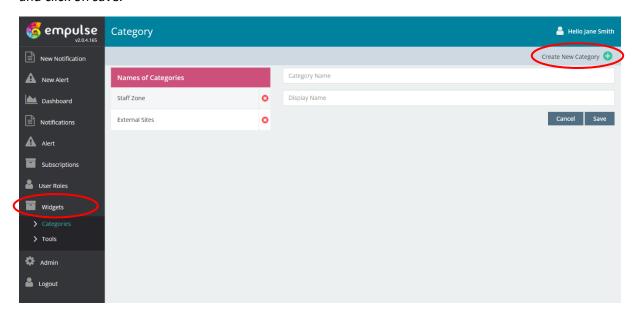




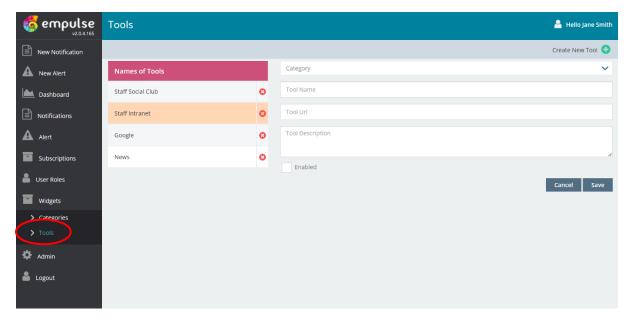
# Widgets

This section is used for creating shortcuts to frequently accessed web URL links, for easy access. This could include any of your online systems such as Intranet, Expense System, Timesheet System or other key online applications.

You can set up 'Categories' for your links to help users find them easily. Just click on Create New Category and then add in the Category Name and the Display Name (what will show on the Client) and click on save.

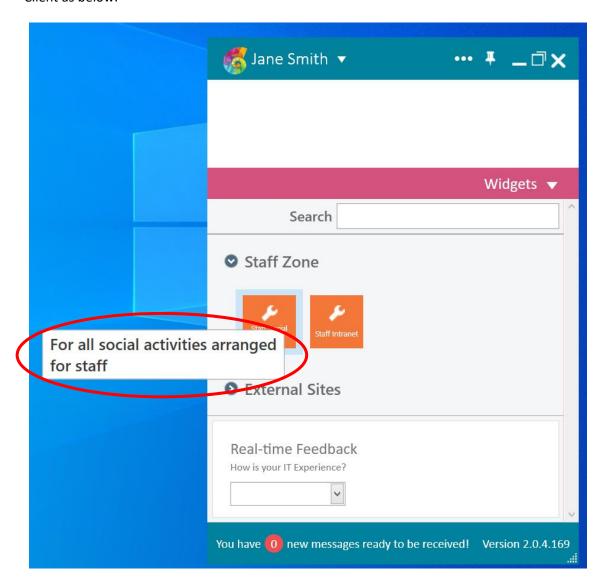


Then under 'Tools' you can add the web URL pages that you would like to link to and choose which of the categories to place them in on the Client.





When you add a description for the specific Tool, it will be shown when they hover over it in the Client as below.



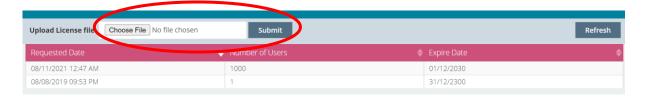


# **Admin**

### Licenses

This gives you the information on your licenses. When *empulse* is purchased, you will get to choose either an annual or multi-year license for a certain number of users. Once the license expires (either because the expiry date has been reached or you have more users using the system than the license permits) some of the system features get disabled.

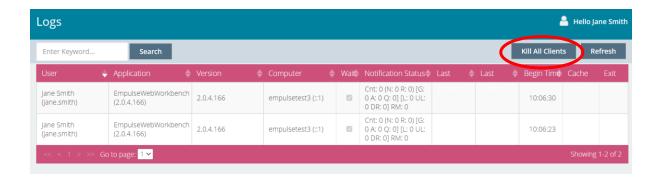
When a new license is due, you contact *empulse* and they will generate a license file which is sent to you to upload and then you can then continue to use the system as normal.



# Logs

This allows anyone who has permission to access this page to see all the various users on the *empulse* system. You can also, if needed, clear the local cache of any user or also to shut the individual client down.

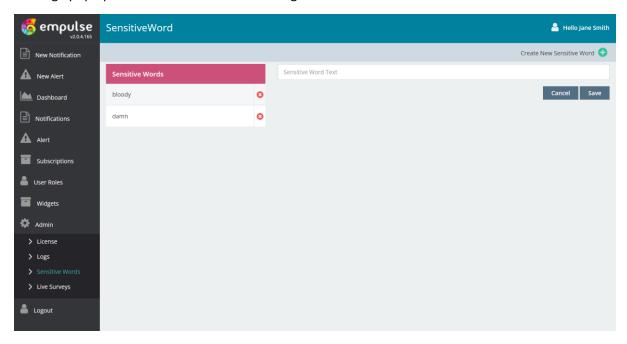
There is also a button called 'kill all clients' – which shuts down all clients across all desktops if there is a need to shut them all down – e.g. if there is a system wide update that is needed etc.





### **Sensitive Words**

You can program in any sensitive words that you do not want used across the system. If one of these words are used when creating General Notifications, Quick Polls or Alerts, the user will get a message pop up to tell them to edit the message.



# **Live Surveys**

This relates to the Real-time Feedback widget at the bottom of the client. You can choose the departments / services that users can feedback on. This list will appear on the Client where the user can select it and choose the happy or sad face. The client will then wait 5 minutes before the user can press it again, to stop people abusing the system and giving unclear or overly biased results.

