# Indie Admin Guide

This document describes the steps to install and maintain Indie in source systems.

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### 1. Preconditions

There are specific conditions required of users in each of the environments Indie can be installed in.

- 1.1. Chrome is our preferred browser to use for this process.
- 1.2. Microsoft Preconditions

Ensure you have Microsoft Azure Global Administrator or Workspace Owner or Admin role before proceeding.

1.2.1. Goto <u>Users - Azure Active Directory admin center</u> and click on your name e.g. "Mod Amin" in below screenshot.

rch «	$+$ New user $\checkmark$ $\downarrow$ Download	users   Bulk operations $\vee$ 🕐 Refre	esh 🔅 Manage view	v ∨ 🗎 Delete	📑 Per-user MFA 🔯 Pi
isers (preview)	Want to switch back to the legacy us	ers list experience? Click here to leave the prev	view.		
it logs 1-in logs 2005e and solve problems	<ul> <li>Search</li> <li>19 users found</li> </ul>	√ Add filter			
,	Display name ↑	User principal name	User type	On-premises sy	Identities
	Adele Vance	AdeleV@4glz4x.onmicros	Member	No	4glz4x.onmicrosoft.com
eted users (preview)	Alex Wilber	AlexW@4glz4x.onmicroso	Member	No	4glz4x.onmicrosoft.com
word reset	Diego Siciliani	DiegoS@4glz4x.onmicros	Member	No	4glz4x.onmicrosoft.com
r settings	Grady Archie	GradyA@4glz4x.onmicros	Member	No	4glz4x.onmicrosoft.com
operation results	🔲 🅡 Henrietta Mueller	HenriettaM@4glz4x.onmi 👖	Member	No	4glz4x.onmicrosoft.com
shooting + Support	indie@pioneera.com	indie_pioneera.com#EXT#	Guest	No	4glz4x.onmicrosoft.com
v support request	📃 ወ Isaiah Langer	IsaiahL@4glz4x.onmicros	Member	No	4glz4x.onmicrosoft.com
	🔲 🔘 Johanna Lorenz	JohannaL@4glz4x.onmicr	Member	No	4glz4x.onmicrosoft.com
	🔲 🌒 Lee Gu	LeeG@4glz4x.onmicrosoft	Member	No	4glz4x.onmicrosoft.com
	🔲 🌘 Lidia Holloway	LidiaH@4glz4x.onmicroso	Member	No	4glz4x.onmicrosoft.com
	Lynne Robbins	LynneR@4glz4x.onmicros	Member	No	4glz4x.onmicrosoft.com
	MJ Manu Jo	testThurday26@4glz4x.on	Member	No	4glz4x.onmicrosoft.com
	Megan Bowen	MeganB@4glz4x.onmicro	Member	No	4glz4x.onmicrosoft.com
	MA Mod Admin	mod@4glz4x.onmicrosoft	Member	No	4glz4x.onmicrosoft.com
	Nestor Wilke	NestorW@4glz4x.onmicr	Member	No	4glz4x.onmicrosoft.com
	OC October26	October26@4glz4x.onmic	Member	No	4glz4x.onmicrosoft.com
	Patti Fernandez Changed	PattiF@4glz4x.onmicrosof	Member	No	4glz4x.onmicrosoft.com
	<b>—</b>	_			

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#### Your details will be displayed:

Basic info

	1od Admin od@4glz4x.onmicrosoft.com ember		
User principal name	mod@4glz4x.onmicrosoft.com 🜓	Group membe	8
Object ID	de180b90-a104-4dcf-852b-ae18b30d1d66 👔	Applications	5
Created date time	Mar 15, 2022, 2:31 PM		
User type	Member	Assigned roles	1
Identities	4glz4x.onmicrosoft.com	Assigned licen	1
My Feed			

1.2.2. You will see "Assigned Roles - click on the number, and you will see your roles listed. Make sure you have "Global Administrator".

- Add assignments 🕐 Refresh   🔗 Got feedback?										
Eligible assignments	Activ	e assignments Expired assi	ignments							
Role	$\uparrow_{\downarrow}$	Principal name	Scope	$\uparrow_{\downarrow}$	Membership	$\uparrow_{\downarrow}$	State	Start time	End time	Action
Global Administrator		mod@4glz4x.onmicrosoft.co	Directory		Direct		Active	-	Permanent	Remove Update

#### 1.3. Slack Preconditions

Ensure you are a Workspace Primary Owner, Owner or Admin. **If you are in an Enterprise Grid environment, ensure the installer is NOT an Org Owner or Admin.** Go to the slack app Slack Administration screen and select Manage Members (see diagram below) to discover members and roles:

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$\leftarrow$ $\rightarrow$ C $\textcircled{a}$ https	;//app.slack.com/client/T047JU8KYLC/C0471U293U7/rimeto_profile/U047A3W1G0N	A* 10
	Search ELPS Pioneera 😎	Q
PioneeraStaging ~ 🕜	# general ~ Company-wide announcements and work-related matters	6
PioneeraStaging	j a bookmark	
P pioneerastaging_slack.com		
This workspace is part of the <b>ELPS Pion</b> organisation Learn more	sera di	
Invite people to PioneeraStaging Create a channel		
Preferences		
Settings & administration	> Settings	
Tools	Vorkspace settings Customise PioneeraStaging	
Sign in to PioneeraStaging on mobi	Editoria darea en datalla	
Sign out	> Organisation settings - ELPS Pioneera	
Add workspaces	Administration	
Switch workspaces	> Manage Slack Connect	
Open the Slack app	Manage members	
✓ Apps	Manage roles Manage apps	
Indie STAGING	Billing	
+ Add apps		
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$ https://	pioneerastaging.slack.com/admin	A Q to 0 4

#### DioneeraStaging

SIGNED IN AS Brian Hay	N	Aanage members			Export member list	Invite people
ACCOUNT		Q. Search current members			3	Filters ~
6 Back to Slack		· · · · · · · · · · · · · · · · · · ·				
Home	1					
Account & profile	5	Name 🕇	Account type	Account status	Authentication	
്യ Configure apps		Brian Hay (you)				
② Analytics		brian@pioneera.com	Workspace owner	Enabled	SSO	
🐉 Customise						
(i) About this workspace		Danielle Owen Whitford danielle • danielle@pioneera.com	I Primary owner	Enabled	SSO	
ADMINISTRATION						
Settings & permissions		Glenn Grant glenn@pioneera.com	Workspace owner	Enabled	SSO	
A Manage members						
🖉 User groups		Jay Kapadia	Workspace owner	Enabled	Default	
Q <sub>+</sub> Invitations		JAY_SECOND_TEST_CHANGE • jay@pioneera.com				
# Manage channels		Manu Varghese				
# <sup>0</sup> Move channels		manu • manu@pioneera.com	Workspace owner	Enabled	SSO	
Slack Connect connections						
Slack Connect invitations		Miao Zhao miao@pioneera.com	-	Deactivated	-	
6 <sup>3</sup> Roles						
Billing		Tahnee Claeys	Workspace admin	Enabled	SSO	
Profiles		tahnee@pioneera.com	· ······	Enabled	550	
OTHER						

#### Or via your Enterprise Grid workspace administration screen:

	https://app.slack.com/manage/EMZ5PDA4U/workspaces/T047JL	J8KYLC/members			⊡ X A <sup>®</sup> ₹	≥) © G   & D ±	* <b>•</b> 0
	Workspaces > PioneeraStaging By request + pionerastaging.slack.com					Open in Slack (	Z Manage Y
ELPS Pioneera	Details Members IDP groups Apps				Ĩ		
Workspaces	6 members Add					All account types 👻 🔍 Filter by n	ame or email addr
All workspaces	Full name	Displa	iy name	Email address		Account type	
	Brian Hay			brian@pioneera.com		Org owner	
	Danielle Owen Whitford	danie	lle	danielle@pioneera.com		Primary workspace owner	\
	Glenn Grant			glenn@pioneera.com		Workspace owner	
	💄 Jay Kapadia	••• JAY_	SECOND_TEST_CHANGE	jay@pioneera.com		Workspace owner	$\mathbf{A}$
	Manu Varghese	··· manu	1	manu@pioneera.com		Org admin	
	Tahnee Claeys			tahnee@pioneera.com		Workspace admin	

# 2. Enable Users to Install Apps

You will need to allow users to install Apps. The Admin will need to configure their system to manage consent so users can install the Indie App.

- 2.1. For Microsoft Azure, the administrator needs to allow users to install apps out of the M365 App Marketplace. The administrator can setup a workflow to request authorisation from an admin or manager of a group. See <u>Microsoft instructions here</u>. Specifically configure consent process <u>here</u>, and approve requests <u>here</u>.
- 2.2. For Slack users, all users in a workspace can install apps by default. Admins for an Enterprise Grid or other Workspace can implement App approval controls, and if present, need to allow installation of the Indie bot. See <u>Slack instructions here</u>.

### 3. Install Indie App

- 3.1. You can start your install by going to the <u>Pioneera website</u>, click on "Get Started", fill in the form and then click "Get Started" at bottom of form. You will be taken to the <u>install Indie page</u>. Otherwise, get your install URL from Pioneera Sales by <u>booking a call</u>.
- 3.2. Select the system to authenticate users and connect Indie to. Click either "Install Microsoft" or "Install Slack".



- 4. Add into Microsoft O365/M365/Teams Tenant
  - 4.1. Indie makes use of the Microsoft Azure Enterprise Applications platform and specifically the OAuth standard to authenticate both you and the Pioneera Indie Enterprise App and enables you to install the Indie Azure Enterprise App. The first step in the install process is that we redirect you to authenticate, after which Microsoft will let us know you are a valid user. If you are not logged in you will be prompted to do so. You will also be prompted to select the account (if you have multiple). Make sure you select your administrator account.

Mod Admin         mod@4glz4x.onmicrosoft.com         Signed in         Manu Varghese1         manu@5r8vcv.onmicrosoft.com         Signed in         Diego Siciliani1         DiegoS@5r8vcv.onmicrosoft.com	:
Manu@5r8vcv.onmicrosoft.com Signed in Diego Siciliani1	:
Signed in	:
Miao@pioneera.com	:
+ Use another account	

4.2. Then login using your credentials:

Microsoft	
Sign in	
Email or phone	
Can't access your account?	
	Next



4.3. Next you will be asked for permission for the Indie Enterprise App to verify your role and discover groups. This allows us to present you with a list of groups from which you select a group to control what employees we can then see and also what employees can see and/or use Indie. Please click "Accept" to proceed.

Microsoft							
brian@pioneera.con	n						
Permissions	requested						
Pioneera - Pro Pioneera Grou							
This app would like	to:						
✓ Sign you in and re	ad your profile						
✓ Read directory data							
✓ Read all groups							
✓ Read all users' full	profiles						
V Maintain access to	o data you have give	en it access to					
Consent on behalf of your organisation							
Accepting these permissi your data as specified in Statement. <b>The publishe</b> for you to review. You c https://myapps.microsoft	their Terms of Service r has not provided I an change these perr	and Privacy inks to their Term					
Does this app look suspic	cious? Report it here						
	Cancel	Accept					

4.4. Once you have approved the Indie App scope permissions, the Indie Enterprise App will appear in your Microsoft Azure Portal Enterprise Apps page:

Microsoft Entra admin center								Ģ	Ф (	9 0	R	mod@4glz4x.onmicroso 4 46LZ4X (46LZ4X.ONMICROSOFT
«	Dashboard > Enterprise applications											
Dashboard All services	Enterprise applicatio	ons   All applicatio	ons									×
FAVORITES     Microsoft Entra ID	« Overview	+ New application 🕐 R	efresh 🞍 Download (Expo	rt) 🛛 🚺 Preview info 🗎 🗏	Columns 🛛 🖬 Preview	features   🖗 Got f	feedback?					
Lusers	<ol> <li>Overview</li> </ol>	View, filter, and search applica	tions in your organization tha	it are set up to use your Microso	oft Entra tenant as their Identi	ty Provider.						
Enterprise applications	🔀 Diagnose and solve problems	The list of applications that are	he list of applications that are maintained by your organization are in application registrations.									
	Manage	₽ Search by application nan	te or object ID Ap	plication type == Enterprise Ap	oplications × Applicati	on ID starts with $~ imes$	⁺ <sub>♥</sub> Add filters					
	All applications	2 applications found										
	Private Network connectors		Object ID	Application ID	Homepage URL	Created on	↑↓ Certificate Expiry S	tat	Activ	e Certificat	e Expi	Identifier URI (Entity I
	Dser settings	Pioneera - Profile	06417760-a26b-468d-96b.	. 91a59f2a-9668-4956-b777	https://pioneera.com/	08/12/2023	-					91a59f2a-9668-4956-b777
	🕮 App launchers	Graph Explorer	2a55a8c1-4087-43f8-a535.	de8bc8b5-d9f9-48b1-a8a	https://developer.microsof	. 25/05/2022			-			de8bc8b5-d9f9-48b1-a8a
	<ul> <li>Custom authentication extensions (Preview)</li> </ul>											
	Security											
	🍨 Conditional Access											
	Consent and permissions											
	Activity											
	Sign-in logs											
	🛍 Usage & insights											
	Audit logs											
	Provisioning logs											
	S⊟ Access reviews											
	Admin consent requests											
	🚴 Bulk operation results											
	Troubleshooting + Support											
	2 New support request											

4.5. Microsoft will send a reply via your browser to confirm this to the Pioneera Platform, and we will then show a loading page indicating we are provisioning your org in our system.

PLEASE DO NOT CLOSE OR REFRESH YOUR BROWSER OR ACCESS MENU ITEMS ELSE YOU WILL NEED TO RESTART FROM Step 1.



4.5.1. If Group Selection is enabled (by Pioneera Admin - default) then the Pioneera Platform will request your Teams Group information. This can take a while depending on how many groups you have in your organisation.



pione <u>era</u>			
the tag	Your Groups		
👋 Welcome Mod!	MICROSOFT 4glz4x		U
💄 Me	We are connecting Indie now		
+ User Settings			
🖶 Groups 🖒			
📽 Group Settings			
Admin Settings			
3ª Logout			
🤳 Need More Help?			
		© 2022 <b>Pioneera</b> Contact us About Blog FAQs	

4.5.2. At this point, we have fully provisioned your organisation in the Indie Service. Click the green button to go to the Admin Settings page to Configure your service.

	pione <u>era</u>	
		Your Groups
	👋 Welcome Lynne!	Congrats! Indie has successfully connected to your Microsoft workspace 4glz4x 🄊 ``
-	Me	
-	Groups >	Click here to go to Admin Settings to finalise setup 🎶
\$	Group Settings	
٥	Admin Settings	
X°	Logout	
ر	Additional Resources	
		© 2023 Pioneera About FAQs Technical Support

4.5.3. At this point you are billable for the group and users able to be licenced.



# 5. Add to Slack Workspace

To be completed



### 6. Configure your Indie Service

After installing the Indie App, you need to configure your Indie Service and provision licences for users, and then engage your users by emailing them an invite to join. This is done from the Admin Settings page that only Admin users or Owners in Slack have access to.

- 6.1. For Microsoft only:
  - 6.1.1. You must first select a group to control which users can be licenced.
  - 6.1.2. Starting at "1. Manage Groups & User Licences", select the group you wish to use in the "Manage Microsoft Groups" table:

← → C = app.pioneera.com/	dashboard/settings 😰 D 🖬 😜 Rélanch to update
🝽 Inbox (91) - haybria 🕋 My files - OneD	ne 🚨 NAB Personal Banku 🦏 My tensaction displ. 📆 myGov-Login 🤄 Native Landa   Ou. 🕴 TESTAK GATEWAY 💿 My Football Club Hou. 🕐 Northem Salavba F. 💿 www.rat.com.au/te. 💥 Login-Draphox ≽ Google Pay »   🗅 All Bookm
pione <u>era</u>	Admin Settings
	1. Manage Microsoft Groups Select the group(s) you would like to onboard Manage groups
🤞 Welcome Mod!	Group Name
L Me	
▲ Me	All Company
😫 Groups 💙	4globs
♥ø Group Settings	Digital Initiative Public Relations
	Mark 8 Project Team
Admin Settings	Retail
Å Logout	Sales and Marketing No records available
📞 Additional Resources	U.S. Sales
	Sample Team Ste version3
	Manu_Testing_MS_Onbaord
	Test
	I < < Page 1 → of 1 > >I   Results per page 50 ▼ Showing 1 - 10 of 10 I < < Page 0 → of 0 > >I   Results per page 50 ▼ Showing 0 - 0 of 0
	Include Groups Remove Groups
	2. Manage Users

6.1.3. The Pioneera Platform will then request the users details (name, email) in this group and populate the "Manage Users" table. This may take some time depending on the number of users. Press refresh if the group has not appeared in the "Manage Groups" table.

O iii) app.pioneera.com/						Ч	្រាប	🥘 Kelaun
Inbox (91) - haybria 🧰 My files - OneDr	brive 🚦 NAB Personal Banki 🧃 My transaction displ 😨 myGov - Login 💡 Native-Land.ca   Ou 🧃 TELSTRA GATEWAY	<u>е</u> м	FootballC	lub: Ho 📀 Northern Subur	ibs F 📀 www.nsfc.com.au/t	e 😻 Login - Dropbo	ax 🕨 Google Pla	
nioneera	1. Manage Microsoft Groups							
pione <u>era</u>	Select the group(s) you would like to onboard		Mana	ige groups				
	Group Name			Group Name				
		Ŧ						T
<b></b>	All Company			Test				
	4glz4x							
<u> </u>	Digital Initiative Public Relations							
4 Welcome Mod!	Mark B Project Team							
Me	Retail							
	Sales and Marketing							
Groups >	U.S. Sales							
Group Settings	Sample Team Site version3							
Admin Settings	Manu_Testing_MS_Onbaord							
Admin Secongs	Test							
* Logout	< < Page 1 + of 1 > >  Results per page 50 ▼ Showing 1 - 10 of 10				1 > >  Results			
Additional Resources	IN C Page 1 U OI 1 / /I Results per page 50 V Showing 1 - 10 01 10			< Fage I + OI	I / // Results	ber bage 50 *	Showing 1 - 1 of	1
	Include Groups		R	emove Groups				
	2. Manage Users							
	Select Users		Mana	ige Users				
	Name Email Role			Name	Email	Role	Update I	Role
	T	Ŧ		Ŧ	T		Ŧ	
	October26 october26@4gtz4x.onmicrosoft.c MEMBER							
	Varghese vinod@4glz4x.onmicrosoft.com MEMBER							
	Adele Vance adelev@4glz4x.onmicrosoft.com MEMBER							
	Johanna Lorenz johannal@4glz4x.onmicrosoft.com MEMBER							
	Mod Admin mod@4glz4x.onmicrosoft.com ADMIN							
	Thursday testthursday@4glz4x.onmicrosof MEMBER				No records a	wailable		



6.2. in the "Manage Users" table, select 5 or more employees who you wish to allocate a licence to use Indie by clicking in their adjacent check box, and then click

Include users

. Note: You must select at least 5 members or viewers NOT including people with Manager role. **Managers are not included in team data.** 

6.3. You can remove these users by clicking their adjacent check box in the "Manage

Users table and clicking



- 6.4. You can assign a role for the individual in the group/team by selecting the role from the drop down i.e. MEMBER adjacent to the user.
  - 6.4.1. You can select "Manager" to give this person access to see the Group Dashboard and edit the group members and sub-groups;
  - 6.4.2. Select "Viewer" to let the user see the Group Dashboard but not edit it.
- 6.5. In the "2. Manage Analytics and Nudges" section, all options are on by default. You can turn off notifications/tips for all users and for managers of teams:
  - 6.5.1. Turn on or off nudges to all individuals using the first switch. Note that the first switch MUST be on for the next two to turn on.
  - 6.5.2. Turn on or off the creation of group analytics and nudges with the second switch. Note that the second switch MUST be on for the last switch to turn on. Note that turning this off stops all team data creation.
  - 6.5.3. Turn on or off nudge notifications to all individuals with Manager role in this organisation with the third switch.
- 6.6. In the "3. Employee Assistance" section:

If you have a corporate Employee Assistance Program or other service that has a URL or contact details for the user, enter them here. This will then appear at the top of the "Need More Help?" page. Contact details for other publicly available and

government recommended aid organisations are already shown. Click to save these additional contact resources. Make all fields blank and click save to remove.



## 7. Invite Users to use Indie

7.1. When the green button appears on the Admin Settings page you can click it to begin the process of inviting included users who have not previously been invited:

Click here if you are ready to go! L

7.2. You will be prompted again to confirm:

pione <u>era</u>	1. Manage Users	What to expect from he	re? ×	1				
<b></b>	Select Users	By confirming, Indie will notify your users and invite them to their individual dashboards. Each			Role		Update Role	
1		user will be notified indi	vidually and will need to		Υ	Ŧ		
Nelcome Manul		provide Indie permission to access their data.			MEMBER		MEMBER ~	
- recomendation		*Note: for Indie to do he	r best work, we	orenz1	MEMBER		MEMBER V	
Me		recommend selecting as many users as possible!			MEMBER		MEMBER ~	
User Settings				Mueller	MEMBER		MEMBER ~	
		No, I need to make some Yes, I'm ready 🏓 changes 🔍	Yes, I'm ready 🍂	ger1	MEMBER		MEMBER ~	
Groups >				ghese1	OWNER		Cannot change	
C Group Settings	IC C Page			1	$\hat{\bar{\varphi}}$ of 1 $\rightarrow$		Results per page 🕨	
Admin Settings	Include users		Remove u	sers				
f Logout		Clie	ck here if you are ready to	go! 💪				
Need More Help?								

7.3. Click "Yes, I'm ready" to initiate the sending of emails to all the included users inviting them to opt in to using Indie. This will result in an email being sent from <u>indie@pioneera.com</u> to every included user containing information and a button to "Accept Invite" by next business day:

# pioneera

	pione <u>era</u>					
You have been invited to join Indie!						
	Accept Invite					
Hi contac	ts First name ,					
	n has installed Indie for your organisation. Join them in building healthy ts and improving your team's overall well-being and productivity.					
What's I	ndie?					
	die plugs into your company's chat system and checks for evidence-based of stress and well-being.					
This allow	s Indie to:					
<ul> <li>Proprocession</li> </ul>	erstand and provide you with insights into your stress and well-being; actively send you evidence-based tips to help improve your well-being and ductivity; p your manager better support you and your team through anonymised					
stre	ss & well-being insights.					
Who are						
	at Pioneera is on a mission to unleash everyone's potential to be happier,					
	and more productive at work, whilst working towards a world where a thing of the past. Indie is just the start!					
Questions	? Just hit the reply button!					
The Pione	era Team					
	6 6					
	Pioneera Group Pty Ltd, 225 George St, Sydney, NSW 2000 Unsubscribe Manage preferences					

Note that this step is optional. You can do your own process for inviting users to use Indie. You just need to communicate the following URL to licenced users: <a href="https://app.pioneera.com">https://app.pioneera.com</a>.

Users who receive the invite email can follow the "Indie User Guide" for instructions on opt in and using Indie.

Note: If you (the administrator) is an included user then you will need to logout and log back in so you will be prompted to opt in in User Settings.

### 8. Changes

- 8.1. The Admin and Owners can change these settings at any time.
- 8.2. Adding and removing users in the source system (Slack or Microsoft group) will result in that user being added/removed BUT the admin will need to go to the Admin Settings page and include user for a licence to be made available for that user.
- 8.3. Billing is monthly in advance based on employees provisioned.
- 8.4. If the person who installed Indie is removed from the customer system **Indie will stop working**. Ensure a new admin person is created in the customer system and

appears in the Admin Settings dashboard BEFORE removing the original user who installed Indie.

# 9. Further Information and Support

What to expect from here?

After your users are included they are able to log in and will be required to opt in to allow Indie to subscribe to and access their data, enabling Indie to be their own personal coach. Status information will appear in each users "Me Dashboard" and Managers of groups will have access to Group Dashboards via the "Groups" menu. With insights and nudges switched on (Admin controls in Admin Settings), included and opted in individuals will receive nudges as and when required for their personal use. Any Manager assigned to a group will receive nudges to help them and their team. Note that Admins, Owners, Managers and Viewers will NOT be able to see who has opted in. A Group Dashboard will only show how many people have opted in out of the total people in the Group.

- 1. See FAQS on our website;
- 2. See "Indie User Guide" for instructions on how to accept invite and opt in to using Indie;
- 3. All users can access support via <a href="mailto:support@pioneera.com">support@pioneera.com</a> during Australian Eastern (Sydney) business hours.