

# Indie Admin Guide

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

Version	1.3
Release Date:	4 March 2024

# Table of Contents

<b>1. Preconditions</b>	<b>3</b>
1.1. Chrome is our preferred browser to use for this process.	3
1.2. Microsoft Preconditions	3
1.3. Slack Preconditions	4
<b>2. Enable Users to Install Apps</b>	<b>6</b>
<b>3. Install Indie App</b>	<b>6</b>
<b>4. Add into Microsoft O365/M365/Teams Tenant</b>	<b>6</b>
<b>5. Add to Slack Workspace</b>	<b>11</b>
<b>6. Configure your Indie Service</b>	<b>12</b>
<b>7. Invite Users to use Indie</b>	<b>14</b>
<b>8. Changes</b>	<b>15</b>
<b>9. Further Information and Support</b>	<b>16</b>

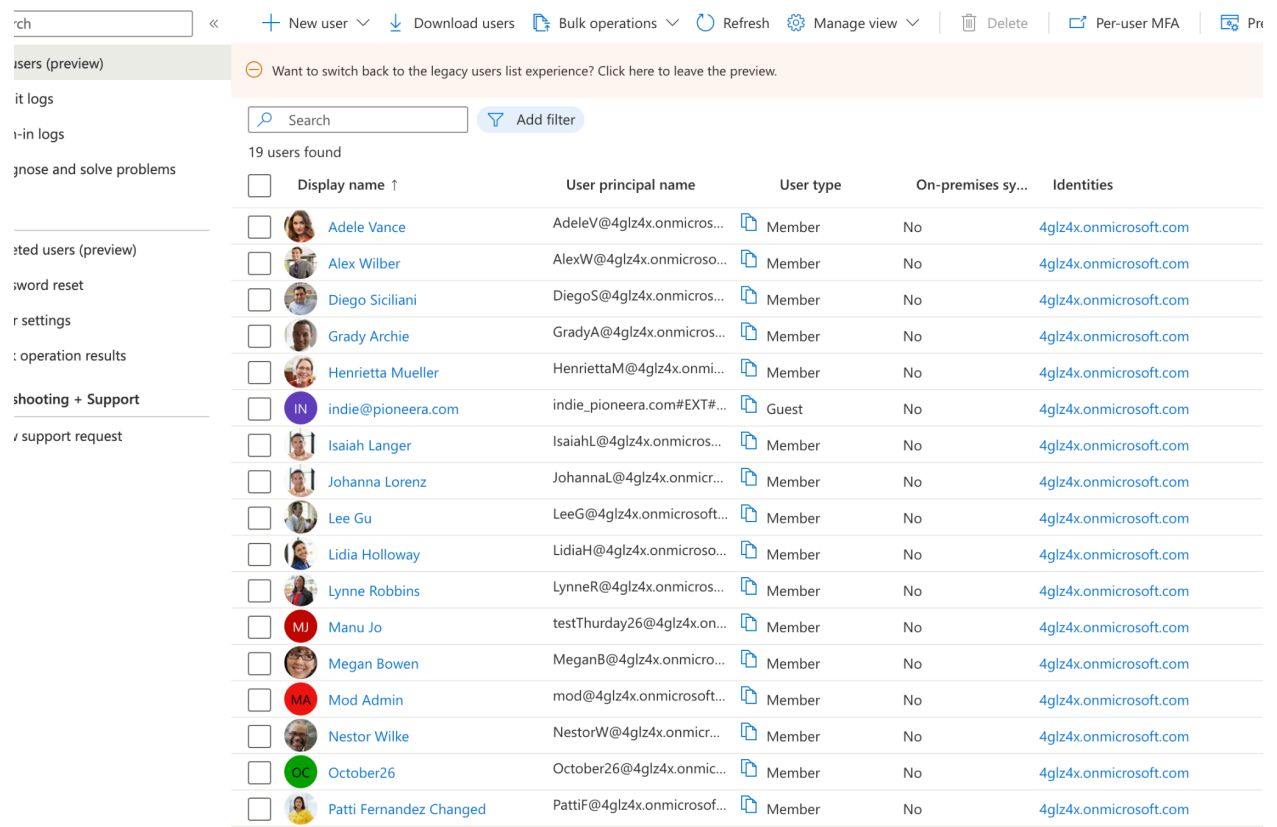
# 1. Preconditions

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 [Users - Azure Active Directory admin center](#) and click on your name e.g. “Mod Amin” in below screenshot.



Your details will be displayed:

Basic info



**Mod Admin**  
 mod@4glz4x.onmicrosoft.com  
 Member

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

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?

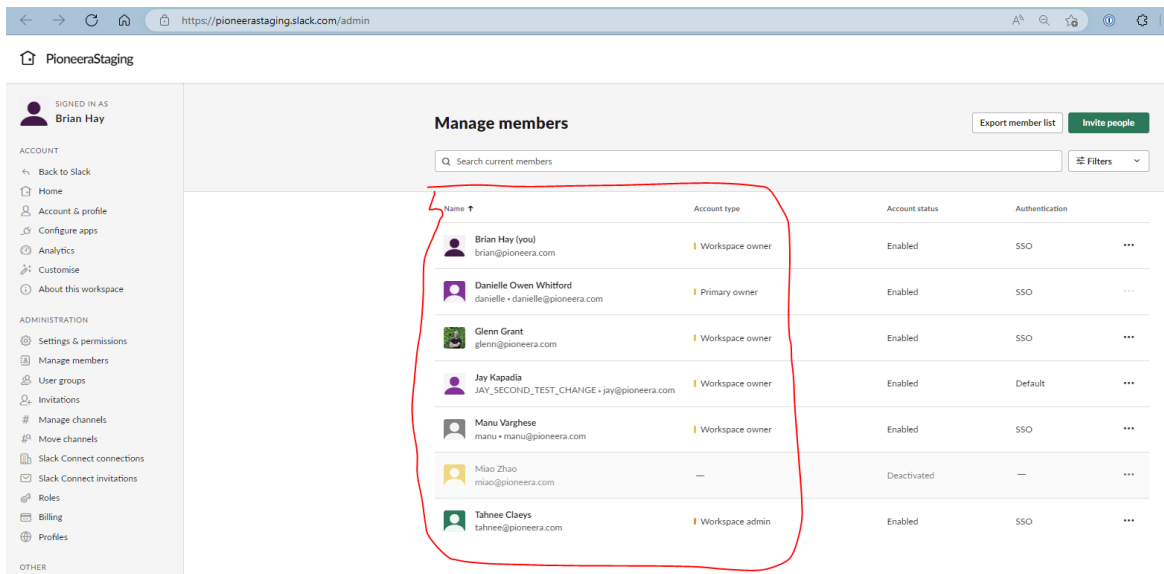
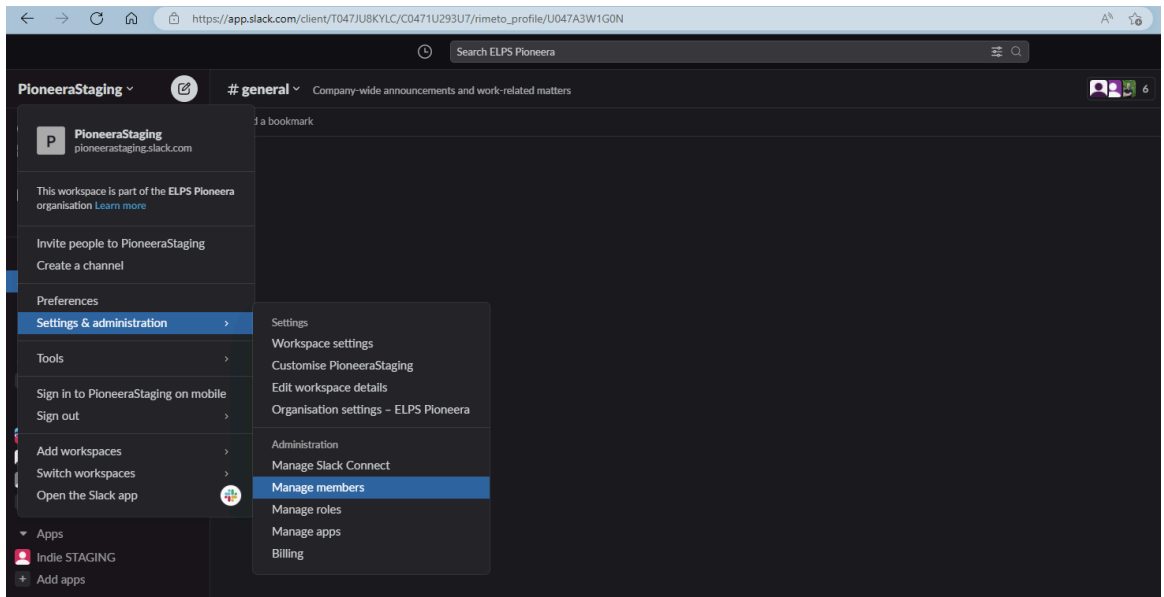
Eligible assignments **Active assignments** Expired assignments

Search by role

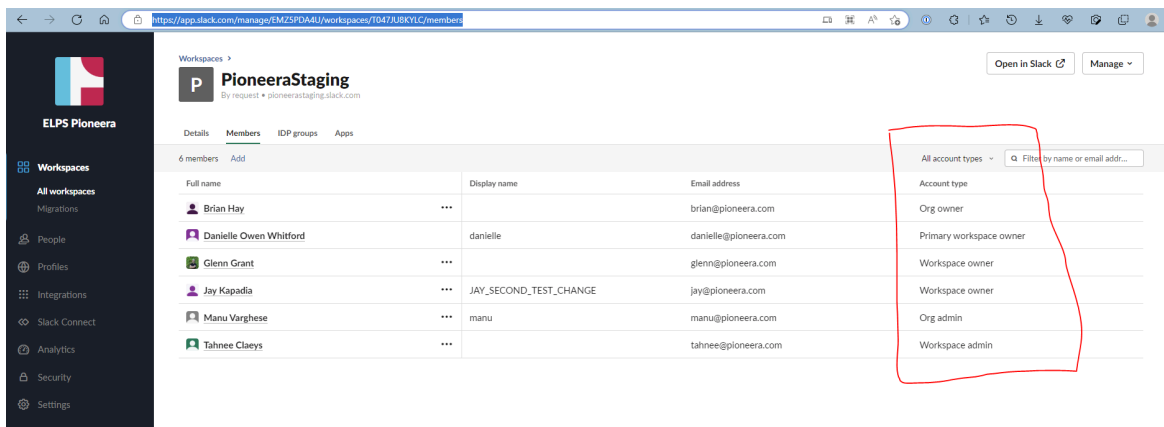
Role	Principal name	Scope	Membership	State	Start time	End time	Action
Global Administrator	mod@4glz4x.onmicrosoft.co...	Directory	Direct	Active	-	Permanent	Remove   Update

### 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:



Or via your Enterprise Grid workspace administration screen:



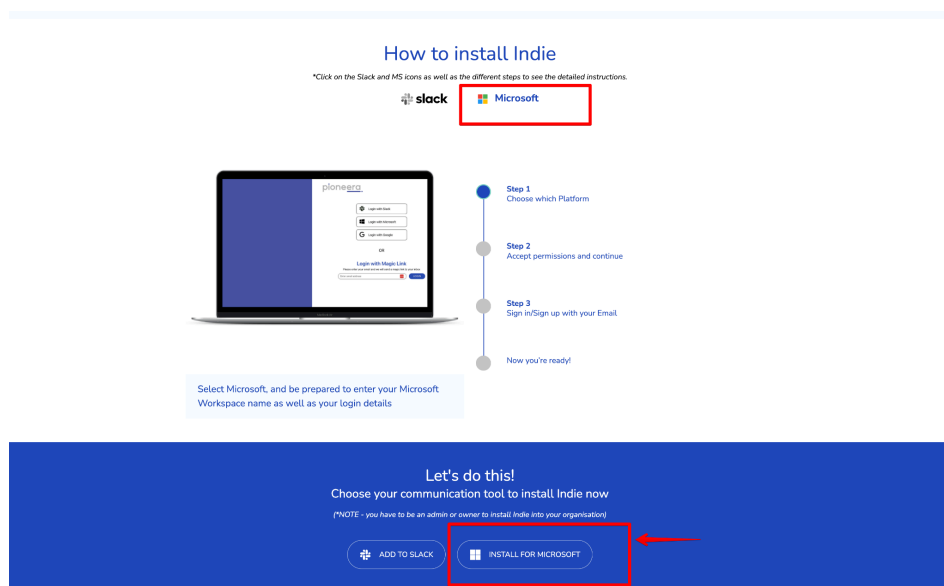
## 2. Enable Users to Install Apps

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 [Microsoft instructions here](#). Specifically configure consent process [here](#), and approve requests [here](#).
- 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 [Slack instructions here](#).

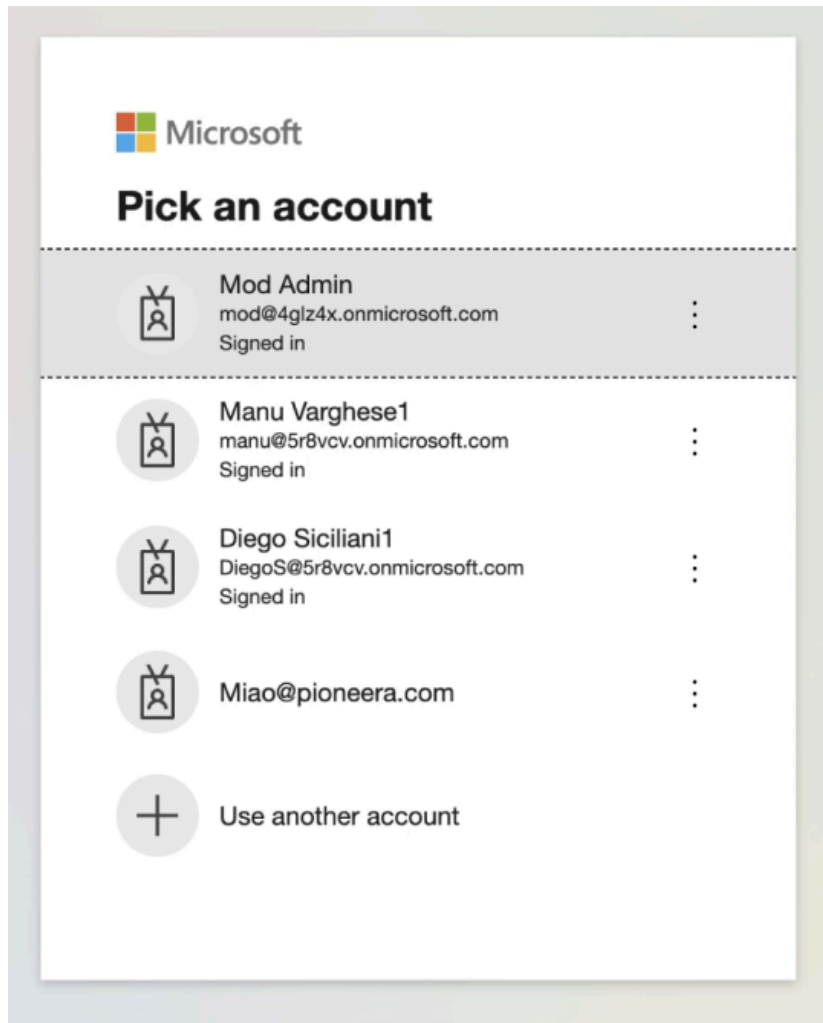
## 3. Install Indie App

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

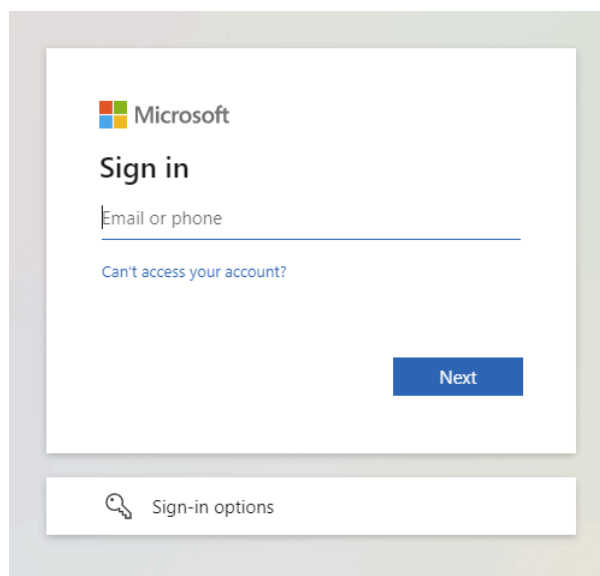


## 4. Add into Microsoft O365/M365/Teams Tenant

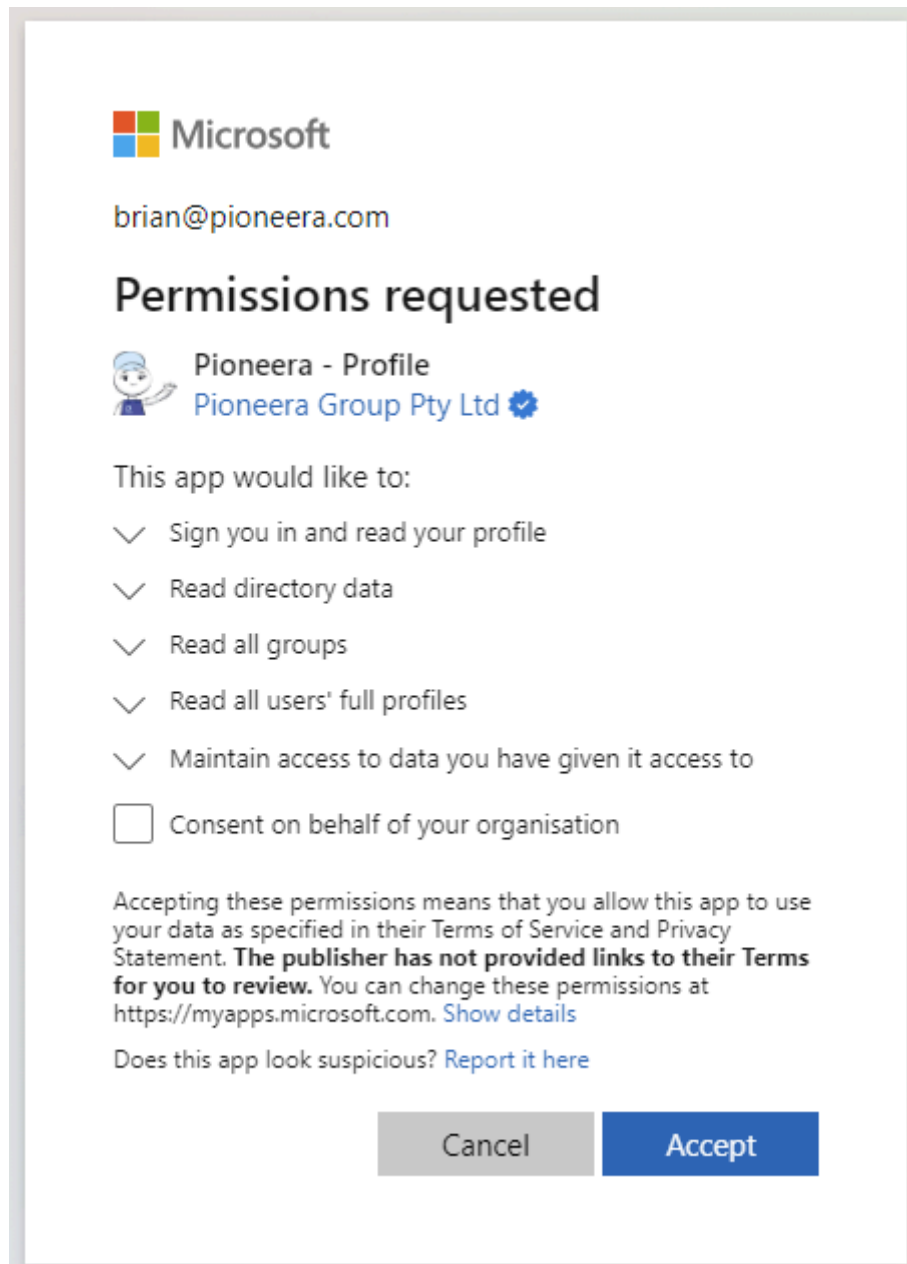
- 4.1. Indie makes use of the Microsoft Azure Enterprise Applications platform and specifically the OAuth standard to authenticate both you and the Pioneera Indie Enterprise App and enables you to install the Indie Azure Enterprise App. The first step in the install process is that we redirect you to 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.



4.2. Then login using your credentials:

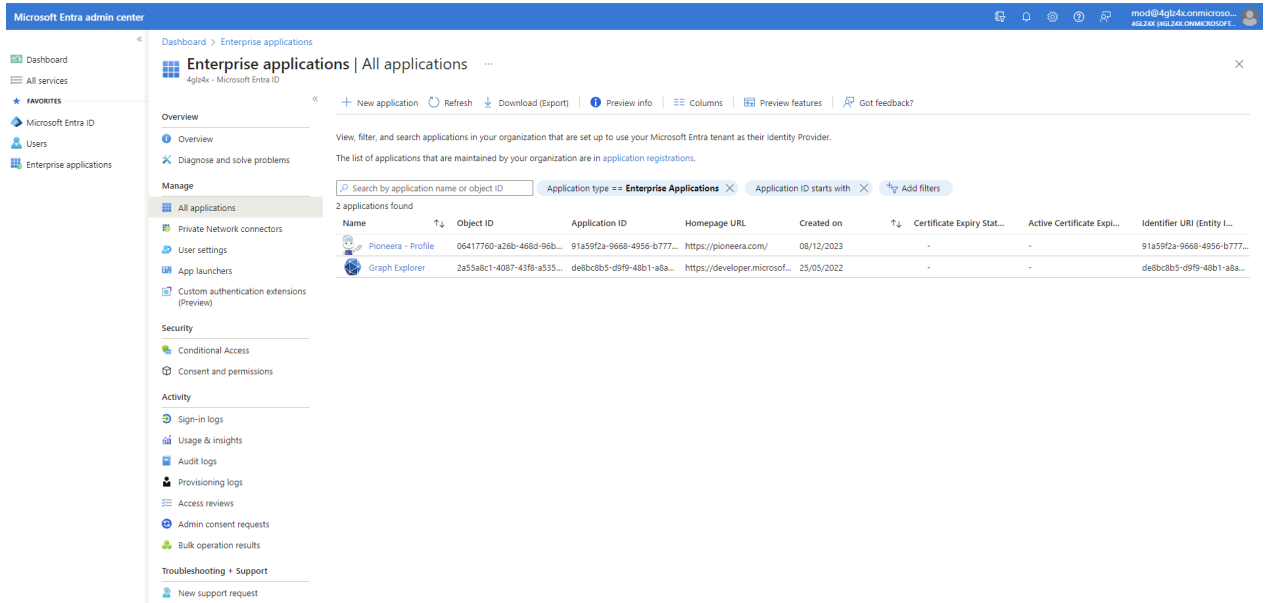


- 4.3. Next you will be asked for permission for the Indie Enterprise App to verify your role and discover groups. This allows us to present you with a list of groups from which you select a group to control what employees we can then see and also what employees can see and/or use Indie. Please click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



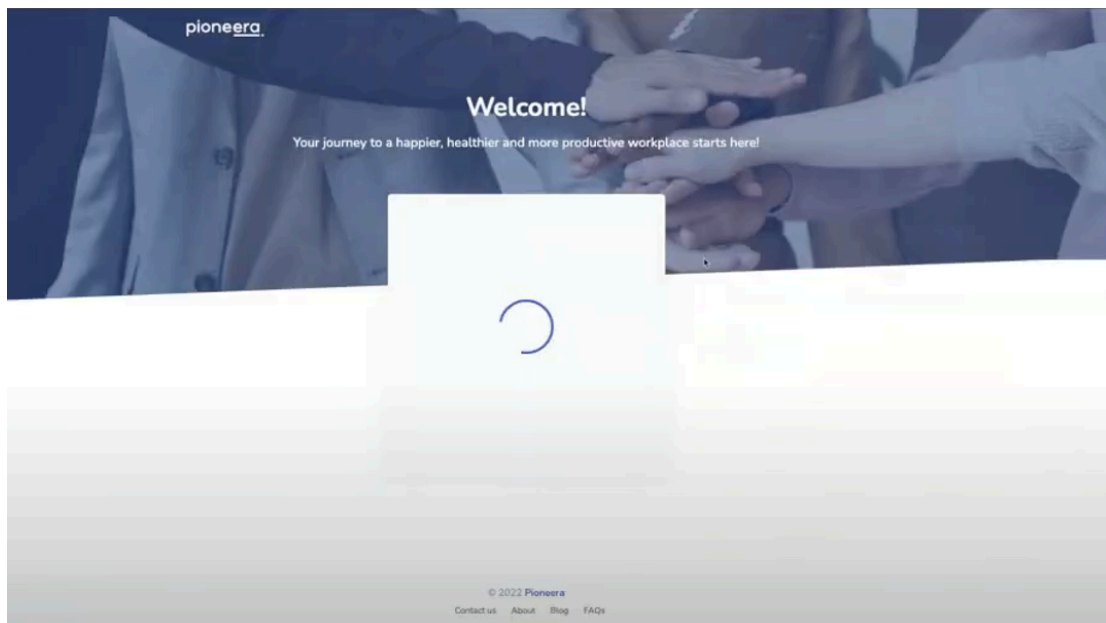


4.4. Once you have approved the Indie App scope permissions, the Indie Enterprise App will appear in your Microsoft Azure Portal Enterprise Apps page:

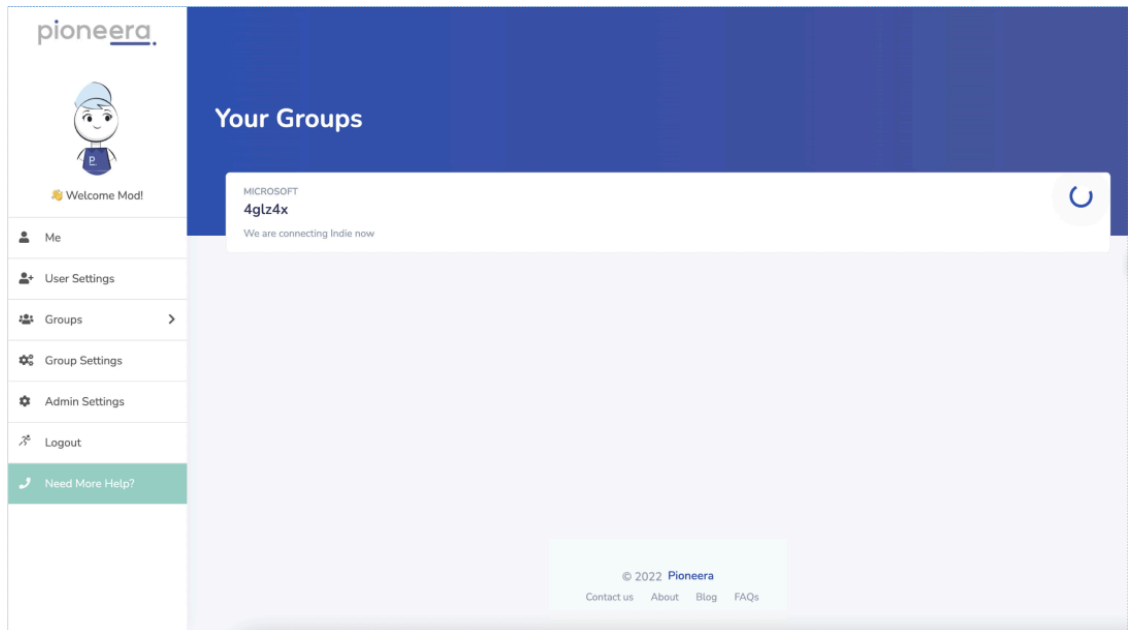


4.5. Microsoft will send a reply via your browser to confirm this to the Pioneera Platform, and we will then show a loading page indicating we are provisioning your org in our system.

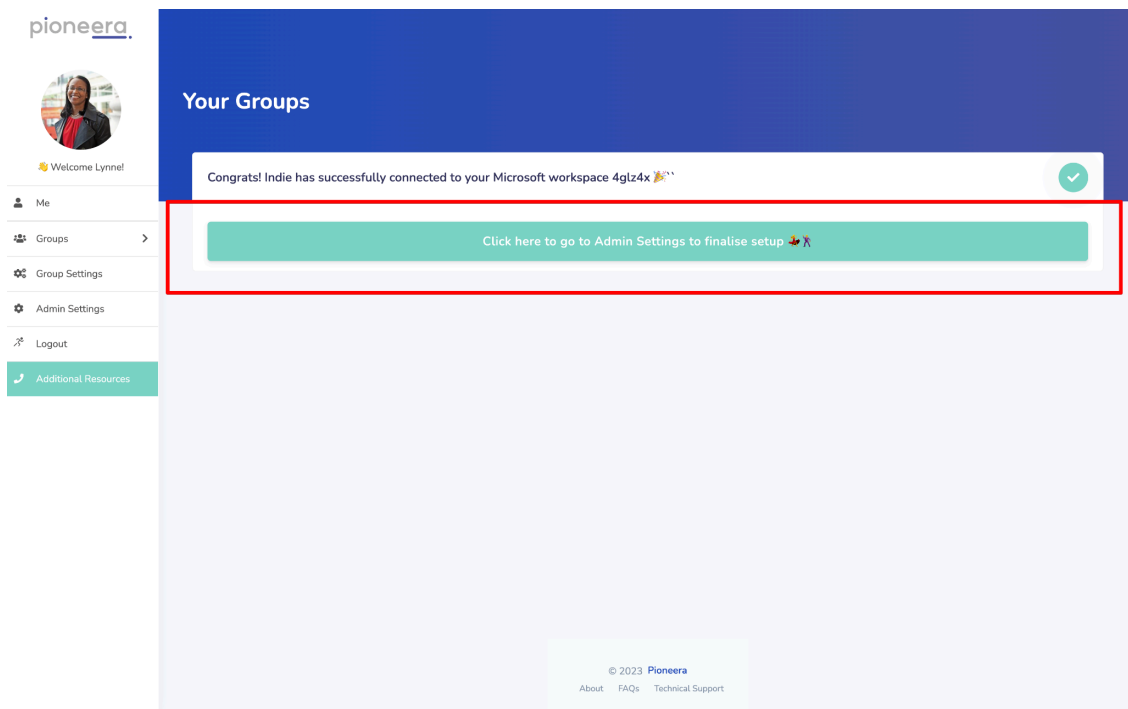
**PLEASE DO NOT CLOSE OR REFRESH YOUR BROWSER OR ACCESS MENU ITEMS ELSE YOU WILL NEED TO RESTART FROM Step 1.**



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.**



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.



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

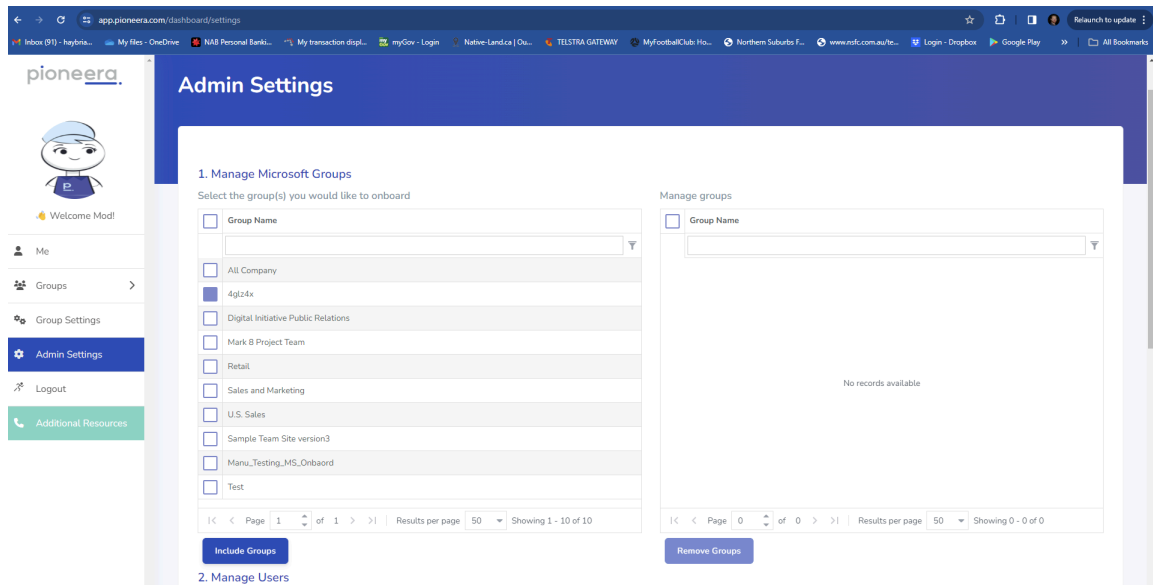
## 6. Configure your Indie Service

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.

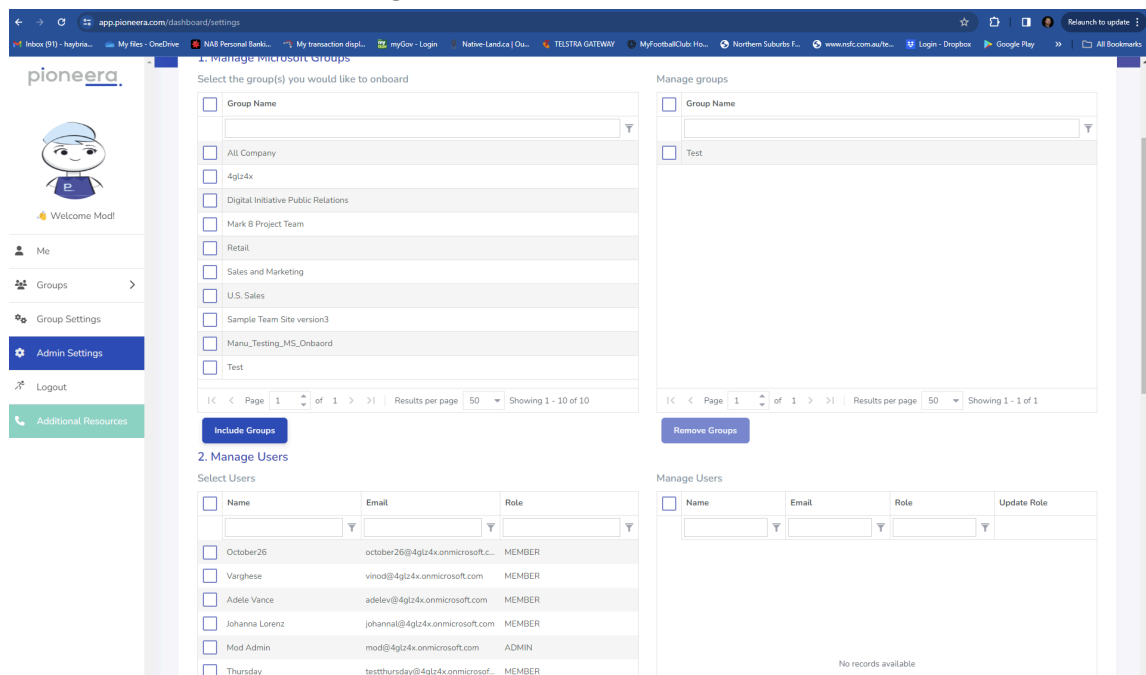
### 6.1. For Microsoft only:

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:



6.1.3. The Pioneer 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.**



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

 .

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.  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

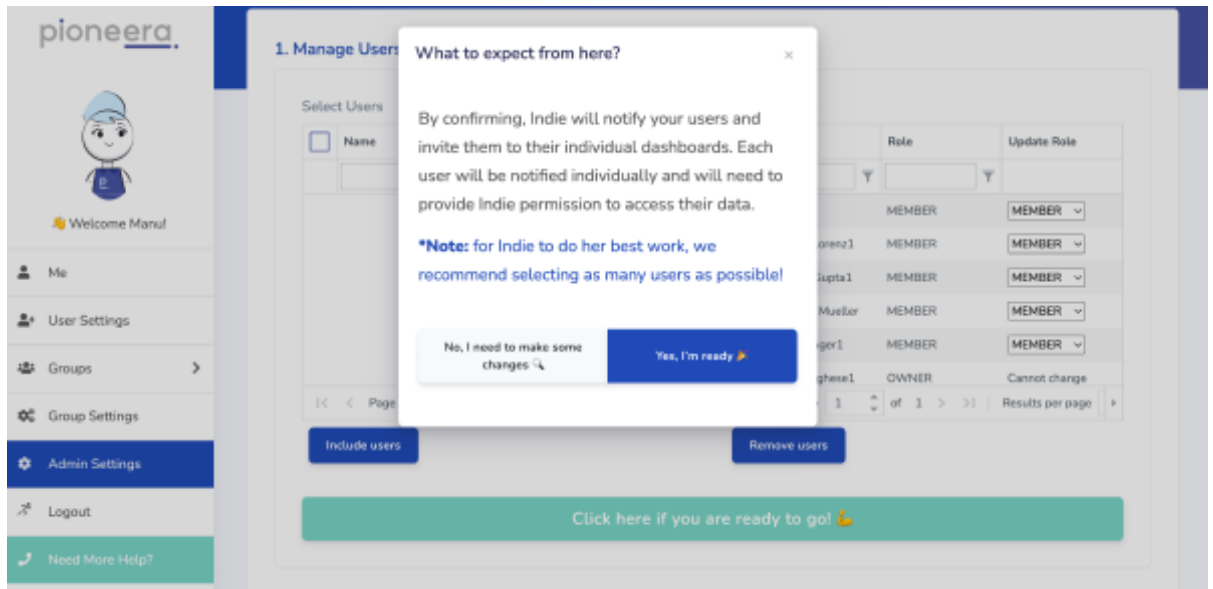
government recommended aid organisations are already shown. Click  to save these additional contact resources. Make all fields blank and click save to remove.

## 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! 🏃

7.2. You will be prompted again to confirm:



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 [indie@pioneera.com](mailto:indie@pioneera.com) to every included user containing information and a button to “Accept Invite” by next business day:



## You have been invited to join Indie!

Accept Invite

Hi .

Your admin has installed Indie for your organisation. Join them in building healthy work habits and improving your team's overall well-being and productivity.

### What's Indie?

Our app Indie plugs into your company's chat system and checks for evidence-based indicators of stress and well-being.

This allows Indie to:

- Understand and provide you with insights into your stress and well-being;
- Proactively send you evidence-based tips to help improve your well-being and productivity;
- Help your manager better support you and your team through anonymised stress & well-being insights.

### Who are we?

The team at Pioneera is on a mission to unleash everyone's potential to be happier, healthier and more productive at work, whilst working towards a world where burnout is a thing of the past. Indie is just the start!

Questions? Just hit the reply button!

The Pioneera Team



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:**

<https://app.pioneera.com>.

**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 [support@pioneera.com](mailto:support@pioneera.com) during Australian Eastern (Sydney) business hours.