

Indie User Guide

This document provided users - team members and managers - with instructions on using Coach Indie, their personal wellbeing productivity AI bot.

Version	1.3
Release Date:	5 March 2024

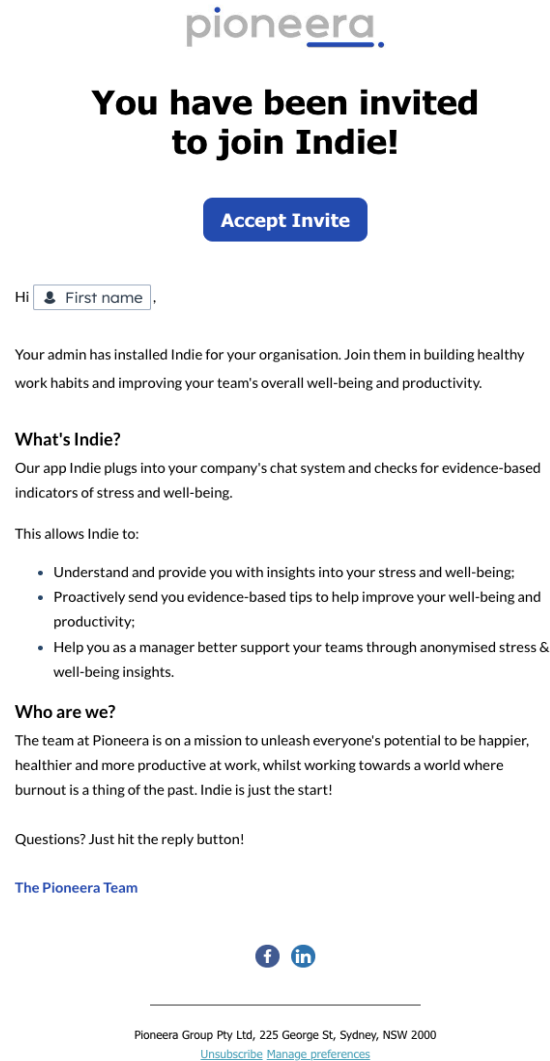
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1. Connect Indie

1.1. Receive Invite to use Indie

Your privacy and confidentiality are our top priority, so Indie can't access your data or work until 1. Your organisation system administrator has installed Indie/given permission; and 2. you give permission. Once Indie has been installed by your administrator, everyone licenced to use Indie will receive an email from Indie@pioneera.com (see image below) inviting them to use Indie using this optin url: <https://app.pioneera.com>.

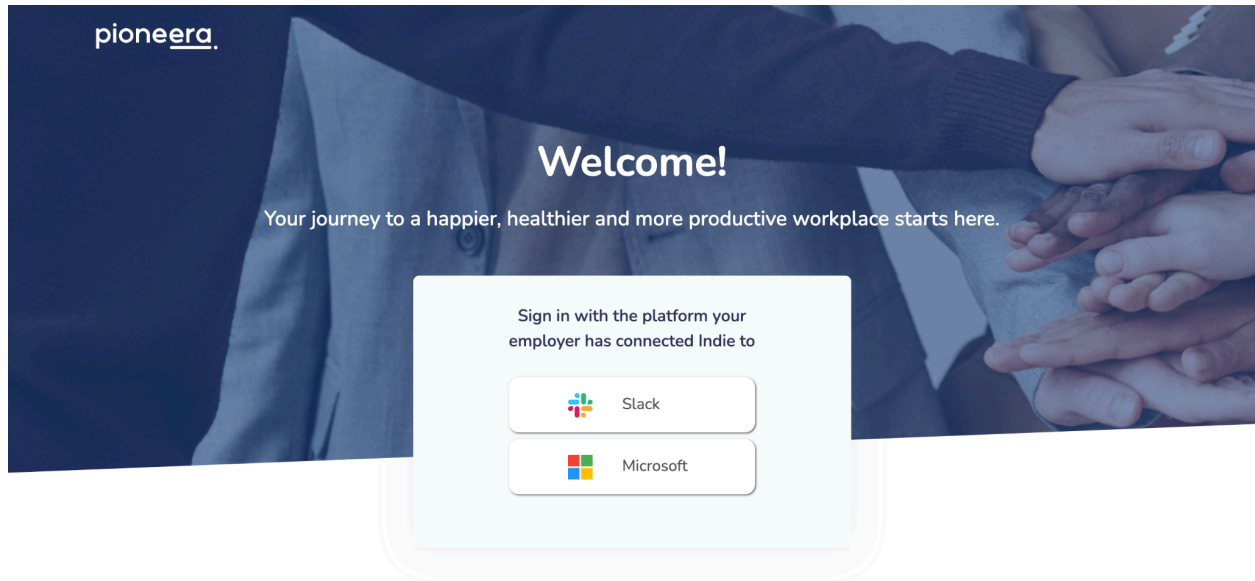


Note that this email may be treated as an unsolicited email by your company email systems, so it may go to spam. Your Manager or other representative in your company may send you this invite URL instead. Note that if you use the optin url before your Administrator has installed the Indie Enterprise App then you will receive an error asking you to have your Administrator install Indie first and setup a billing account.

1.2. Accept Invite & Optin to use Indie

When you click on the optin URL (you will be taken to the Pioneera dashboard. To receive notifications, you'll need to connect Indie to either your Slack or Microsoft Teams account (depending on what your organisation uses regularly).

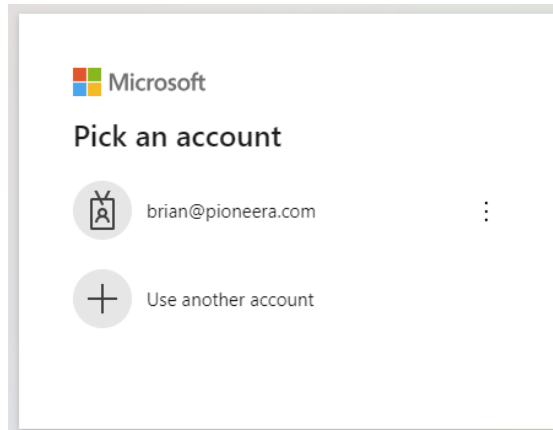
You will be prompted with the screen below to authenticate and sign in. Select the platform your employer has connected Indie to. If you're unsure we recommend checking with your administrator or manager.



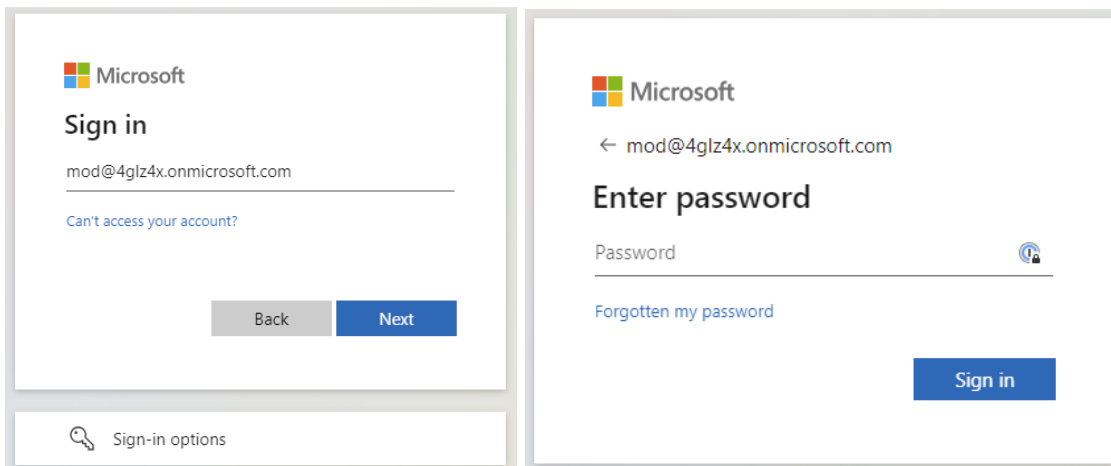
1.2.1. Microsoft

To get started using Indie, you'll need to opt in to integrating Indie to your Microsoft Teams environment.

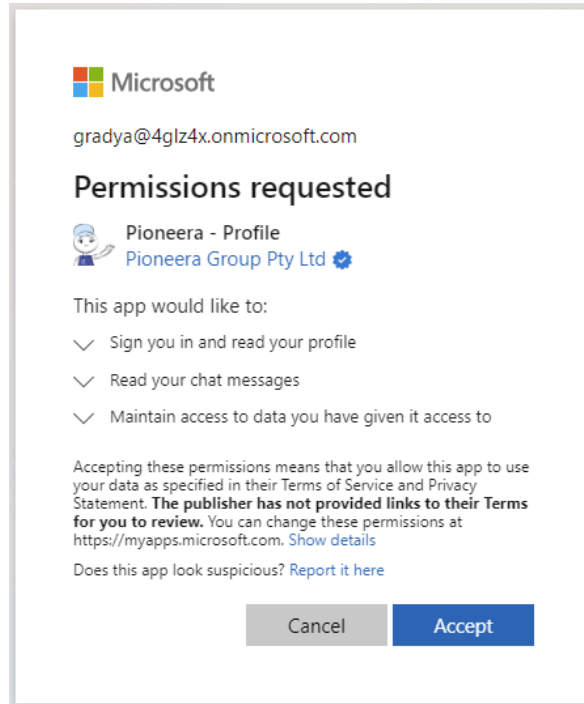
1. Select the Microsoft sign in option to start this process.
2. When you login you will opt in to using Indie. You will be prompted to select an account to authenticate with - ensure it is the same as the tenant domain the Indie Enterprise App has been installed in:



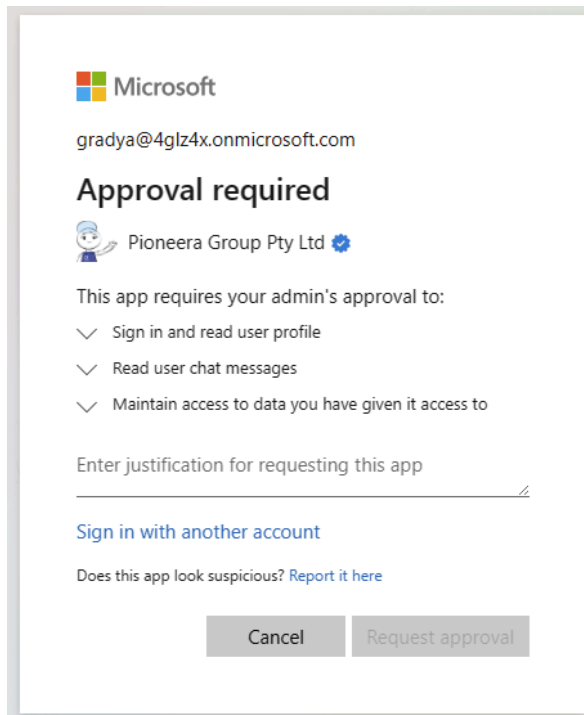
3. Enter credentials as per your organisations policy, e.g. username password:



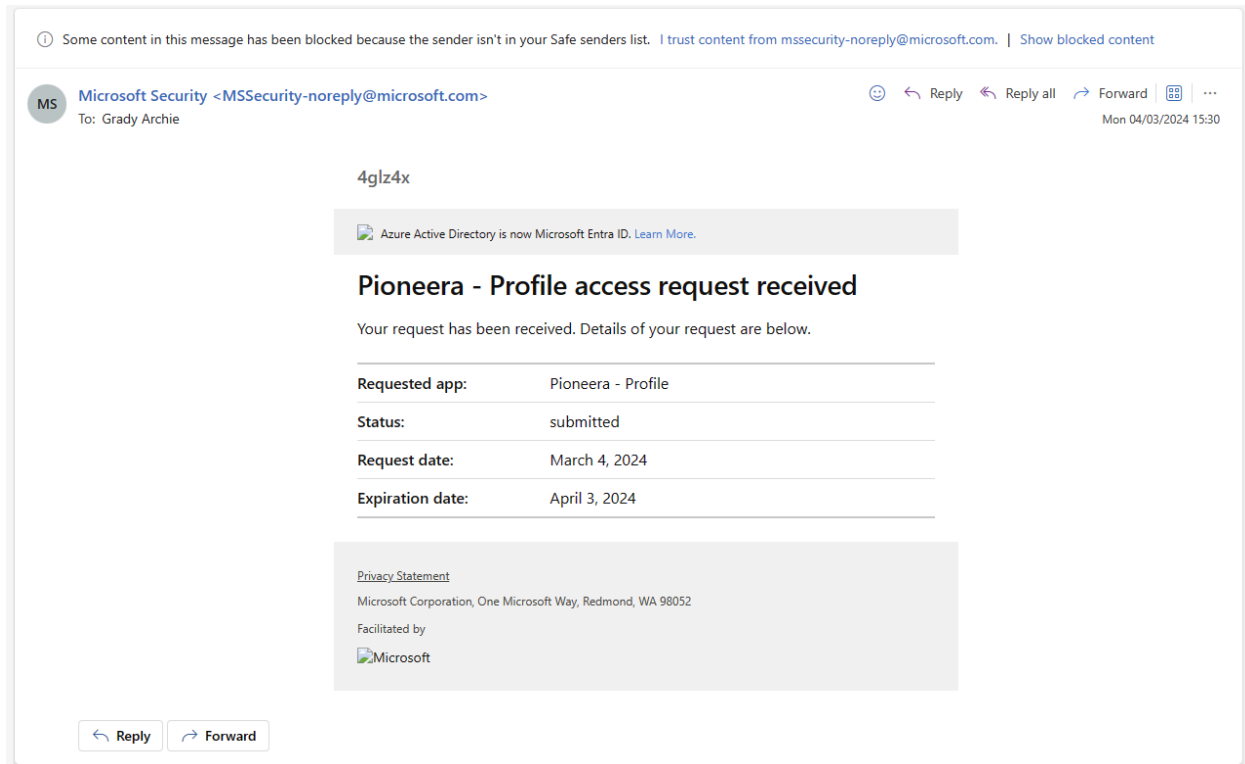
4. Then you are presented with the permissions Indie requires you to accept to integrate with your Microsoft Teams.
 - a. If your administrator has pre-approved use of Indie or has no approval process, then you will be presented with a permissions screen for you to just click "Accept";



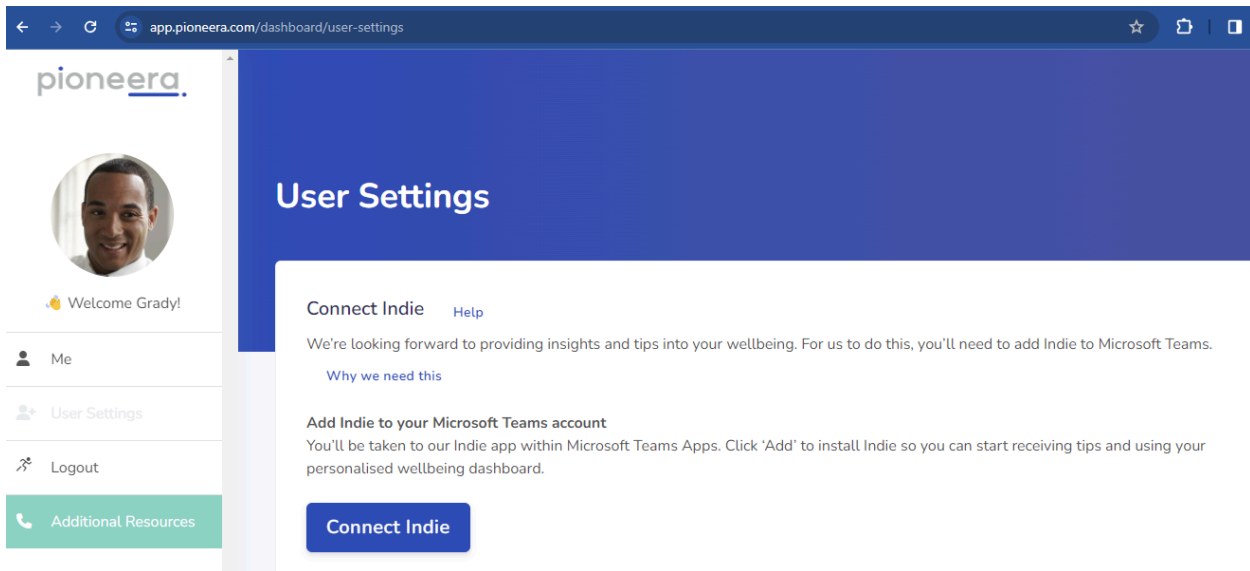
- b. If your administrator has setup policy requiring users to request permission to activate apps, then you will be presented with a screen to make the request:



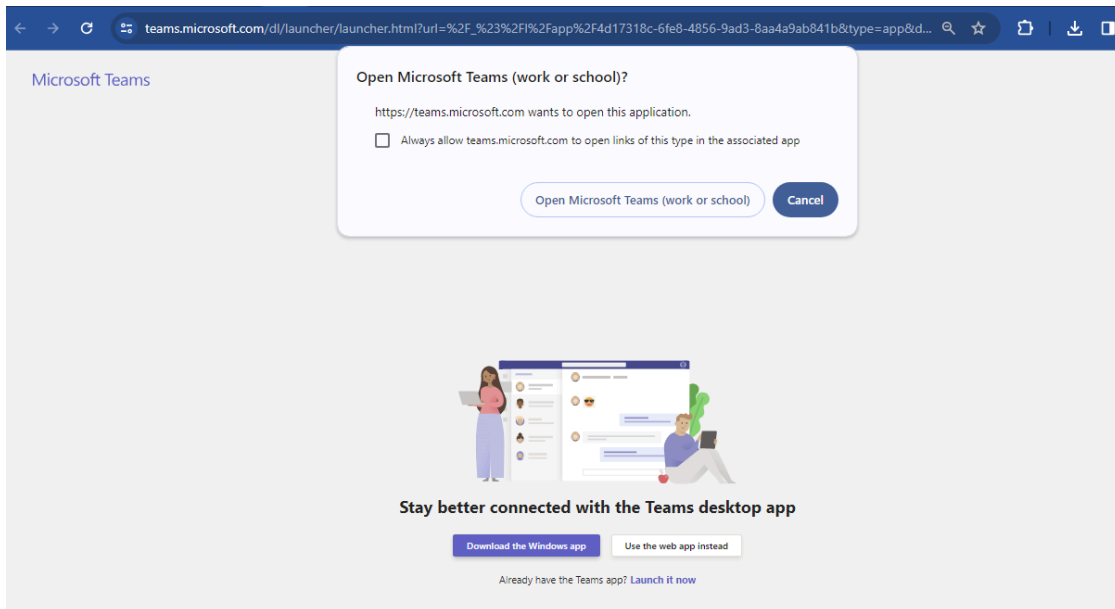
- i. You will receive a prompt in your email confirming the request, and then when your administrator approves, you will receive another email. At this point you can restart at step 1.



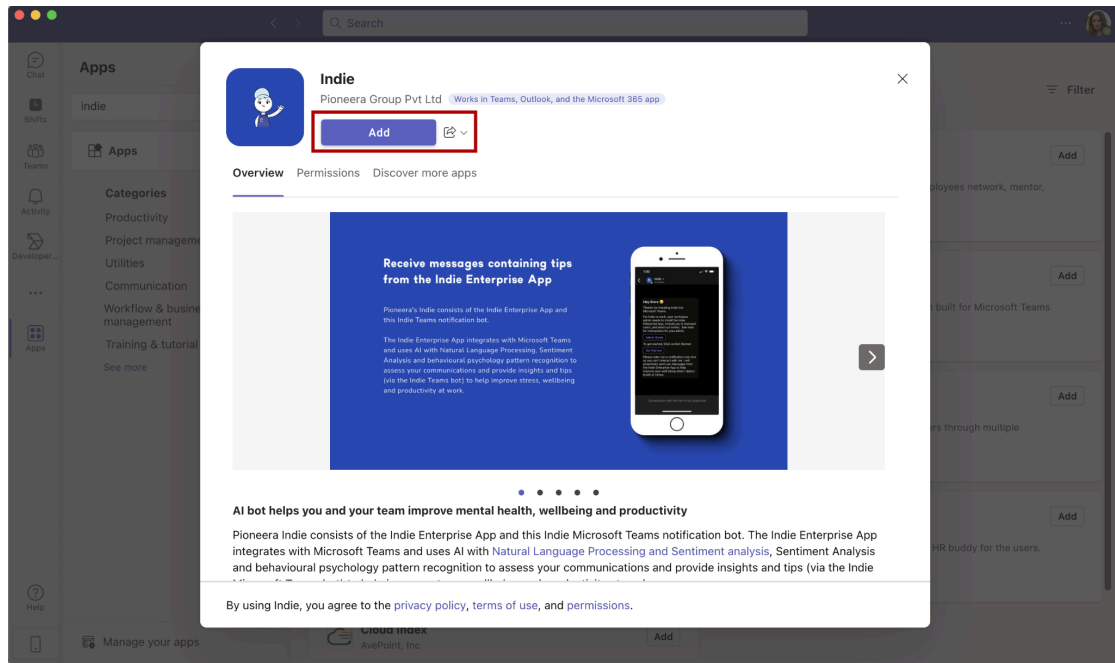
- You will be taken to your user settings page where you need to click “Connect Indie” to check you have the Microsoft Teams Indie App installed and to complete your optin:



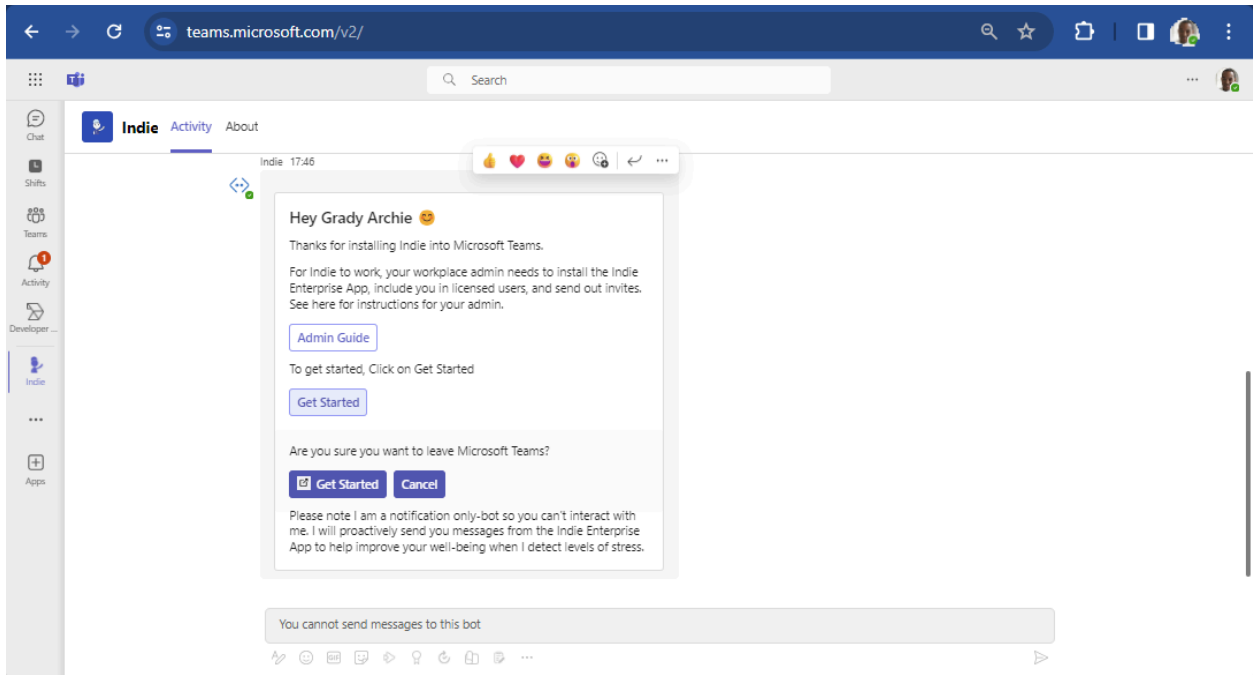
- If you have not yet installed Indie in Teams you will be directed to Microsoft Teams to Add the Indie App. Choose either browser/webapp or open Microsoft Teams:



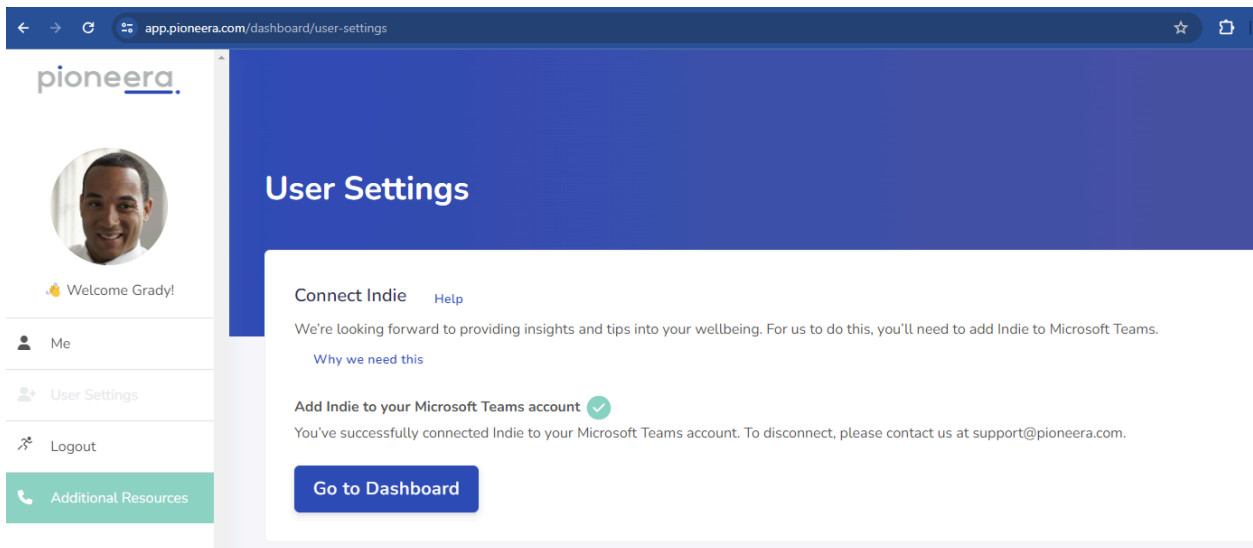
- Within your Microsoft Teams, you will be prompted to install the Indie App. Select “Add”:



- Once installed, you will be presented with your first interaction with Indie:

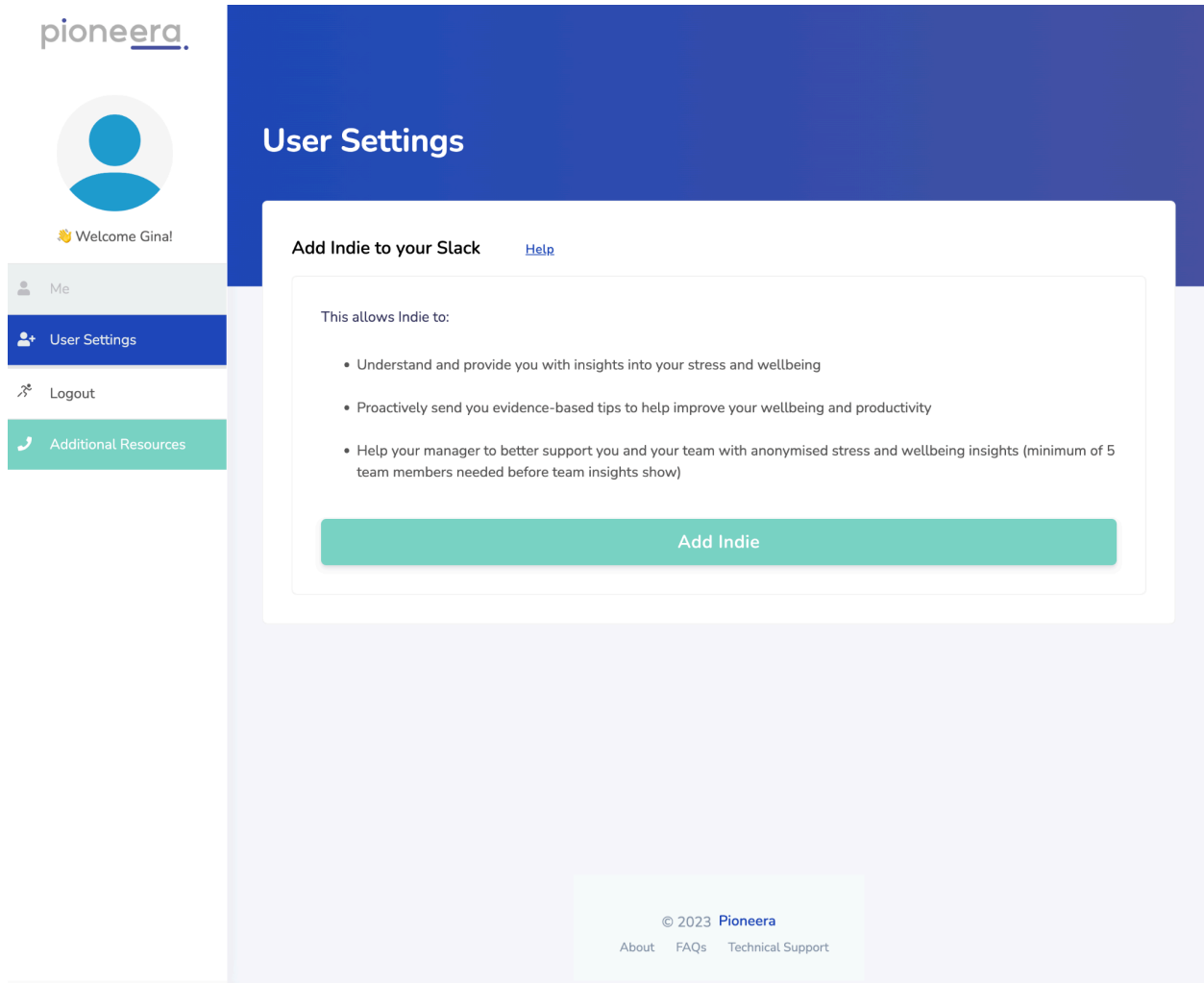


9. From here you can click “Get Started” to goto your Indie Dashboard:

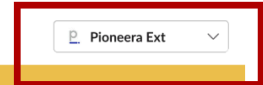


1.2.2. Slack

To get started using Indie, you'll need to optin to integrating Indie to your Slack Workspace. Select the Slack sign in option to start this process. You will be taken to your user settings page where you need to click "Add Indie" to optin:



You will be prompted to approve permissions, and you need to select your slack workspace first:



This app is not approved by Slack. [Learn more.](#)



Indie is requesting permission to access the Pioneera Ext Slack workspace

What will Indie Beta V2 be able to view?

- Content and info about you ▶
- Content and info about channels & conversations ▶
- Content and info about your workspace ▶

What will Indie Beta V2 be able to do?

- Perform actions in channels & conversations ▶
- Perform actions in your workspace ▶

Where should Indie Beta V2 post?

Indie Beta V2 requires a channel to post to as an app

June Fisher (you) June Fisher

Cancel Allow

Then you click “Allow”.

If your Slack Workspace Administrator has setup controls on applications, then you will receive a prompt to request approval:

You will get confirmation of this request to your Workspace Administrator via Slackbot:

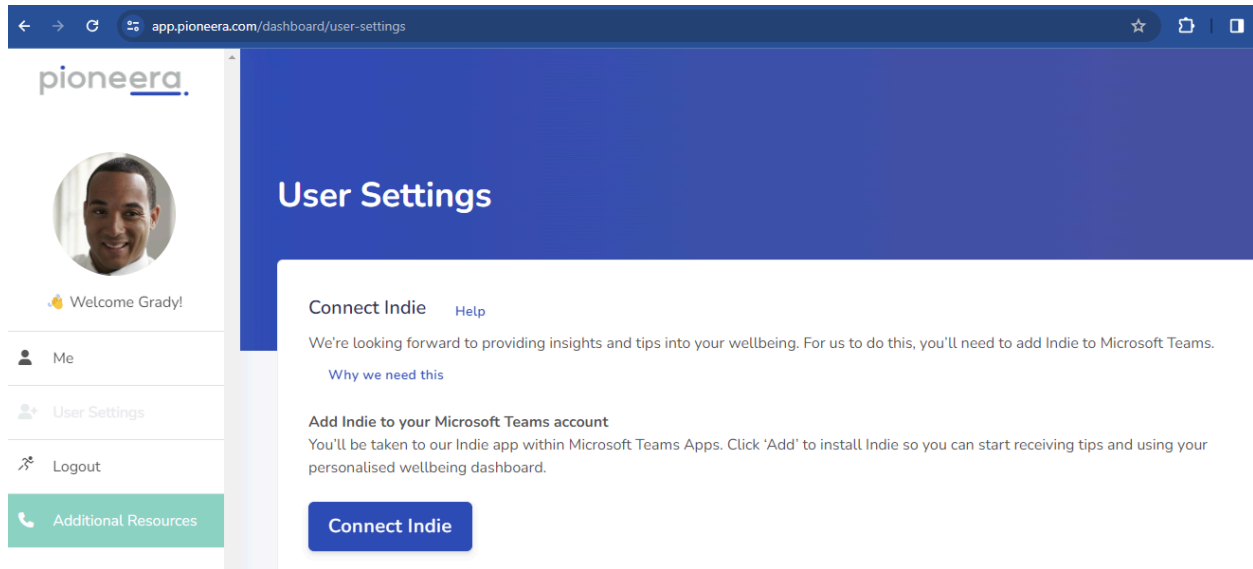
Your Administrator will also be prompted via Slackbot in their Slack app:

Once your administrator approves, you will get confirmation in your Slackbot:

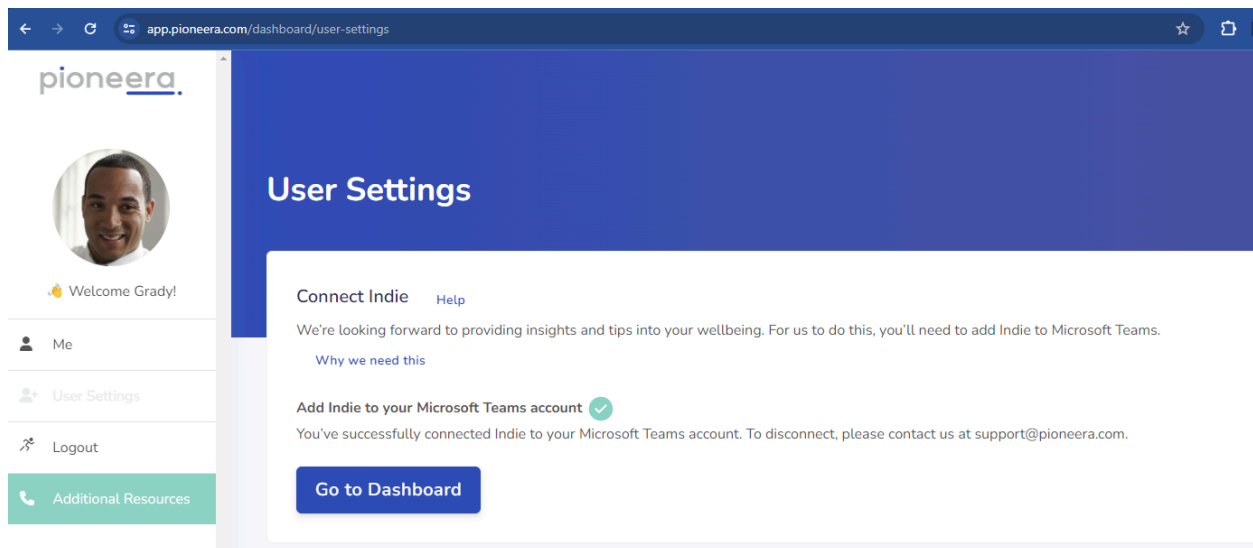
You can now use the optin url again to give your permission and start using Indie.

2. User Settings

This is the first experience a user will have with the Indie Dashboard. This page is where a user can optin (give permission) to Indie to access their data source. Indie needs this to assess your interactions to enable insights and coaching. User privacy and confidentiality is at the core of our service. Indie exists to serve and coach individuals and maintain confidentiality, and users have full control over data that Indie can use and how Indie interacts with them. We do not sell or share your data, and your workplace cannot access your insights and coaching. How we treat your data is defined in our [Privacy Policy](#).



Once connected it will show data and permissions Indie has been given:



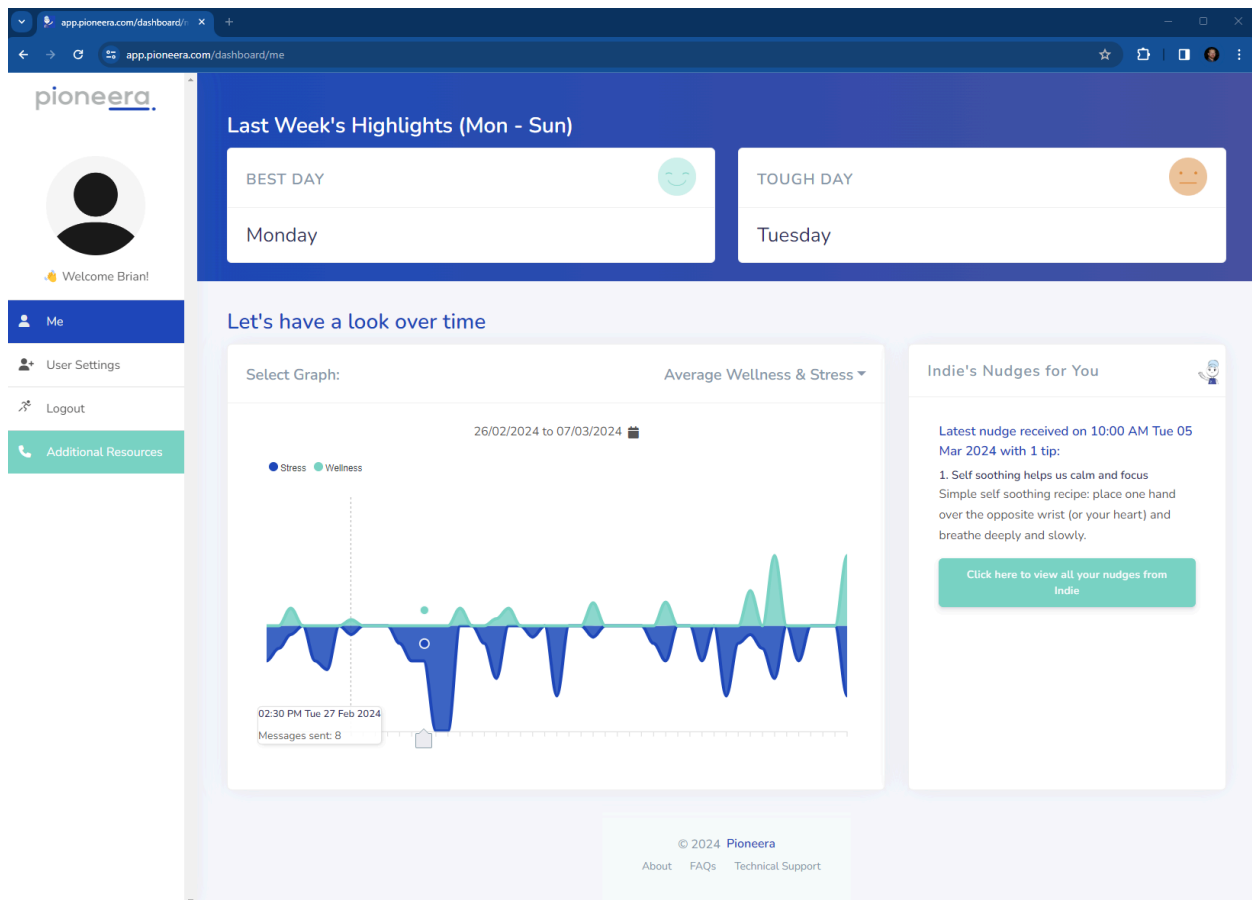
3. Me (User Dashboard)

When you first connect Indie, she sets your personal stress and wellness baseline. Your baseline is how Indie knows when you need help and what help you need and so she can personalise that help. It will take some time to get that data and analyse it (we need a minimum of 50 messages over a week or so - an example of your normal interactions), so you might not have any graphs for a while.

Once Indie has all your data and you have a baseline set, she gets to work when you do. Your dashboard will show your average stress and wellness trend for the last 7 days, plus the best and worst day in the last week (where a week is Monday to Sunday).

The features in the dashboard are explained below:

1. On your personal Me dashboard, you see the stress and wellness trends of the last week. A few things to note here. You want some blue (stress) and some green (wellness). Both at the same time usually indicates productivity (good job!). You can see in our CTO's dashboard, he's been experiencing some regular stress. However he doesn't have as much wellness. You can see periods that there is no wellness. That is something to work on.



- Best day and toughest day trend. We are excited about this one as people have been asking us this for a while. So we have provided it!! Click on the best or toughest day box at the top of your screen and it shows your trend below. Knowing the trend of your best and toughest days, helps you can target efforts in that direction.

The screenshot shows the Pioneer dashboard interface. At the top, there's a navigation bar with the Pioneer logo and a user profile section. Below the navigation bar, the main content area is divided into several sections:

- Last Week's Highlights (Mon - Sun):** This section features two boxes. The first box is labeled "BEST DAY" with a green smiley face icon and shows "Monday". The second box is labeled "TOUGH DAY" with an orange frowny face icon and shows "Tuesday".
- Let's have a look over time:** This section includes a "Select Graph:" dropdown menu set to "Best and Toughest Day". Below this is a calendar for February 2024. Each day in the calendar is marked with either a green smiley face (indicating a best day) or an orange frowny face (indicating a toughest day). For example, Monday the 12th and Friday the 2nd are marked as toughest days, while Wednesday the 14th and Friday the 9th are marked as best days.
- Indie's Nudges for You:** This section displays a notification: "Latest nudge received on 10:00 AM Tue 05 Mar 2024 with 1 tip: 1. Self soothing helps us calm and focus. Simple self-soothing recipe: place one hand over the opposite wrist (or your heart) and breathe deeply and slowly." Below the notification is a green button that says "Click here to view all your nudges from Indie".

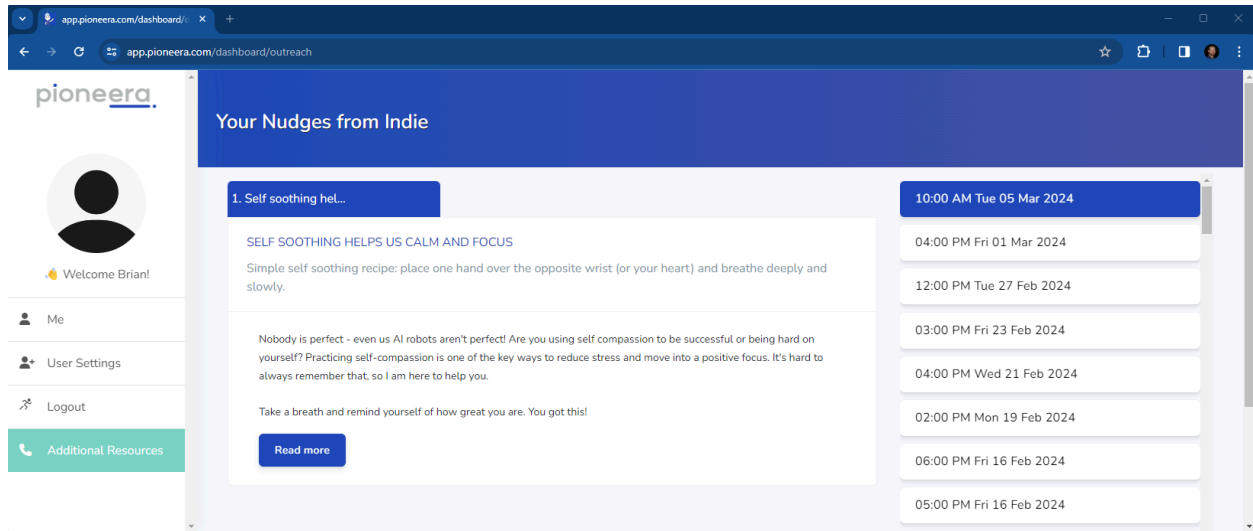
At the bottom of the dashboard, there is a footer with the copyright notice "© 2024 Pioneer" and links for "About", "FAQs", and "Technical Support".

- If you click on the message box, it will give you a view of your messages and how active you've been in your comms. We find that's good to look at and then match back to stress and wellness. Then you can do a bit of your own detective work to see if there are certain meetings/times of day/pieces of work you love, or you need more support on.

The screenshot shows the Pioneer app dashboard for a user named Brian. The dashboard is divided into several sections:

- Header:** "Last Week's Highlights (Mon - Sun)" with two cards: "BEST DAY" (Monday) with a smiley face icon, and "TOUGH DAY" (Tuesday) with a sad face icon.
- Left Sidebar:** A navigation menu with options: "Me", "User Settings", "Logout", and "Additional Resources". A "Welcome Brian!" message is displayed above the menu.
- Main Content Area:**
 - Let's have a look over time:** A section titled "Messages Trend" showing a line graph of "Messages Sent" from 26/02/2024 to 07/03/2024. The y-axis ranges from 0 to 16. The x-axis shows hourly intervals from 09:30 AM on Thursday to 03:30 PM on Friday.
 - Indie's Nudges for You:** A section titled "Indie's Nudges for You" with a sub-header "Latest nudge received on 10:00 AM Tue 05 Mar 2024 with 1 tip:". The tip is: "1. Self soothing helps us calm and focus. Simple self soothing recipe: place one hand over the opposite wrist (or your heart) and breathe deeply and slowly." Below this is a button that says "Click here to view all your nudges from Indie".
- Footer:** "© 2024 Pioneer" with links for "About", "FAQs", and "Technical Support".

- You can now see the most recent nudge received on the right hand side. They are targeted nudges to what you needed at that time. They will be the same ones Indie sends to you in teams or slack. Click to view all the nudges you have received to date:



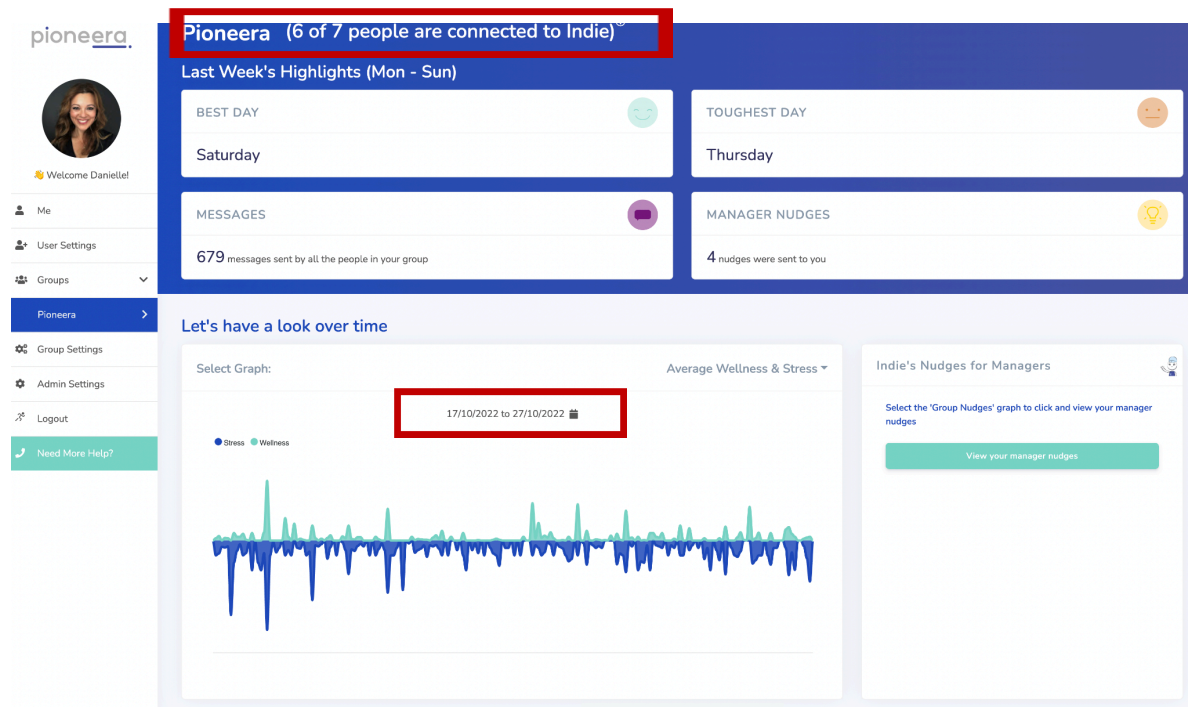
Nudges form a curriculum of skills for users to help them become more resilient to stress, as well as provide actionable goals for managers to address systemic stress causes i.e. hazards in their teams and environment. Individual patterns of stress and wellness over time (current analysis timeframe is one week) i.e. insights inform Indie to allow provision of nudges to address the identified situation.

4. Groups (Manager Dashboard)

You will only get the manager dashboard if you have Manager or Owner role in the system. If you think you should have it and you don't, please speak to your administrator.


A few things to note here:

1. The numbers at the top will tell you how many people have given their permission to connect Indie. You need a minimum of 5 users (admin's and managers don't count) in order for group data to be presented. If this number is below 5, then you won't get any data.
2. As with the individual, take note of the trends of the team. We can see here pretty positive stress patterns. Chronic stress is when there is all blue and no recovery back to normal in between. We can see here there is also gaps of no wellness in the team. If no wellness goes for more than 1.5 days, our CEO starts to check in with people and see how things are doing.
3. You can change the calendar dates to look at any period you like or compare periods to each other. Useful when you're looking for improvement/movement over time.



Best day, toughest day is a great way to understand how your team is tracking and many managers use to understand the impact of hybrid working. Is your best day always an office or home day? How are people on either side of these days? This is worth taking note of. Here the best day is a Saturday - our CEO doesn't want to see that trend continue!

pioneera.



Welcome Danielle!

- Me
- User Settings
- Groups
 - Pioneera
- Group Settings
- Admin Settings
- Logout
- Need More Help?

Last Week's Highlights (Mon - Sun)

BEST DAY 😊

Saturday

TOUGHEST DAY 😞

Thursday

MESSAGES 💬

679 messages sent by all the people in your group

MANAGER NUDGES 💡

4 nudges were sent to you

Let's have a look over time

Select Graph: Best and Toughest Day ▾

October 2022 ◀ ▶

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20 😞	21	22 😊	23

Indie's Nudges for Managers

Select the 'Group Nudges' graph to click and view your manager nudges

View your manager nudges

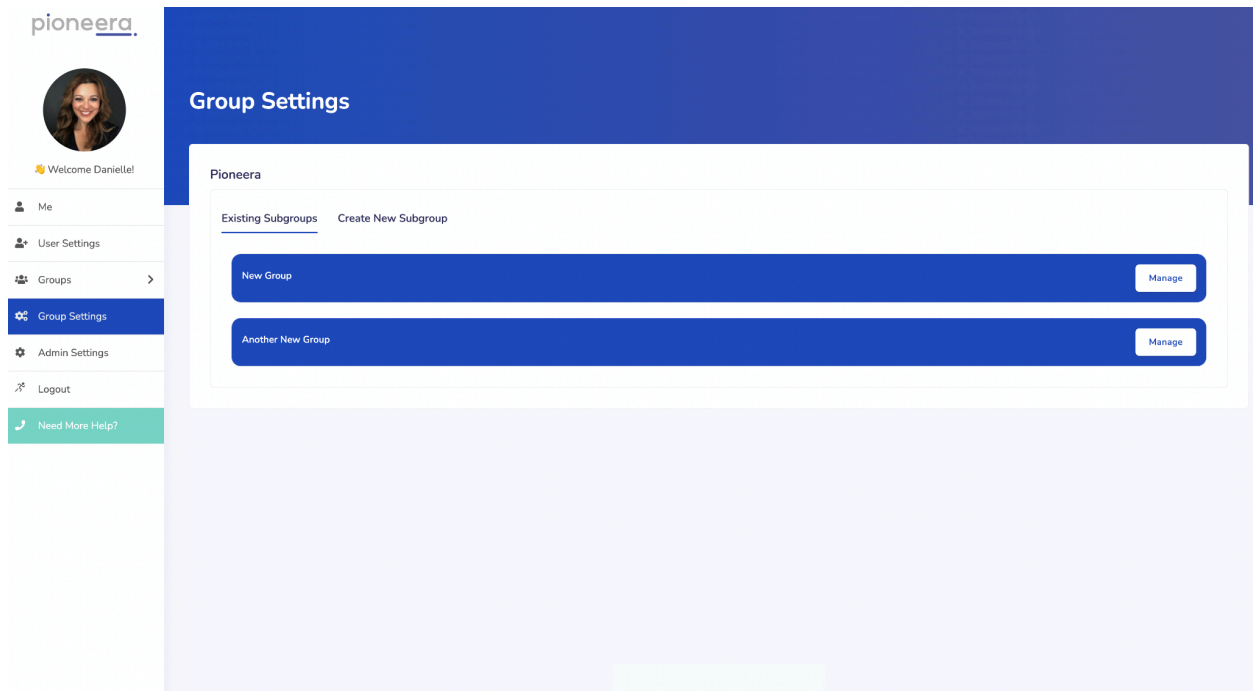
As a manager you can't see any individual data - we maintain people's privacy. The intent of the manager dashboard is to give you the data you need to support the team. In this view here of user nudges you can see how many nudges have been sent to your team and when. This is useful in 2 ways:

1. Are there specific times of the day my team needs help from Indie and how can I help them with that?
2. a great conversation to have with your team as to how they are using the Indie nudges. Some conversation starters: what's your fave, how have you used them, what did you do again, what nudges did you actually do!! Did any make you laugh and have you shared any with your peers/family/kids!!

The screenshot shows the Pioneer dashboard interface. On the left is a navigation sidebar with options like 'Me', 'User Settings', 'Groups', 'Pioneer', 'Group Settings', 'Admin Settings', 'Logout', and 'Need More Help?'. The main content area features a top navigation bar with four summary cards: 'BEST DAY' (Saturday), 'TOUGHEST DAY' (Thursday), 'MESSAGES' (679 messages sent), and 'MANAGER NUDGES' (4 nudges sent to you). Below this is a section titled 'Let's have a look over time' containing a bar chart. The chart shows 'Individual Nudges' (red bars) and 'Manager Nudges' (blue bars) over a period from 17/10/2022 to 27/10/2022. A dropdown menu for 'Manager Nudges' is open, showing options: 'Best and Toughest Day', 'Group Messages', 'Manager Nudges', and 'Average Wellness & Stress'. To the right of the chart is a panel titled 'Indie's Nudges for Managers' with a button to 'View your manager nudges'.

5. Group Settings

This page shows you your existing sub teams/groups, and you can create more. If you have a large group and you'd like to break it down further, you can create a subgroup. It's very simple to do, just go to the group settings tab and you can set up a new subgroup (under the one you're the manager of) or make some changes to move people in or out of the group. Again it needs to be a minimum of 5 - and that doesn't include you!!



You can create subgroups for any group of people - it doesn't have to just be the same functional team. You can do for project groups, cross functional teams, customer groups, new recruits, anything where you would like to support a specific group.

6. Additional Resources

If configured by administrator, contact details for your corporate Employee Assistance Program and other free, public services available in your jurisdiction will be presented here. This is if you need immediate help, specifically a person to talk to:

The screenshot shows a web browser window displaying the Pioneer dashboard. The browser's address bar shows 'app.pioneera.com/dashboard/eap'. The dashboard has a dark blue header with the Pioneer logo and a user profile section with a 'Welcome Brian!' message. A sidebar on the left contains navigation links: 'Me', 'User Settings', 'Logout', and 'Additional Resources' (which is highlighted). The main content area is titled 'Additional Resources' and includes a warning: 'If you're ever in an emergency, or at immediate risk of harm to yourself or others, please contact emergency services on 000.' Below this, there are two main sections. The first is 'Your organisation's Employee Assistance', featuring a blue lightning bolt icon and contact details for 'Mine': 'brian@pioneera.com' and '0409810160'. The second section is 'Other public services recommended by the Australian Government', listing five services with their logos, descriptions, websites, and phone numbers: Beyond Blue (24/7 mental health support service, beyondblue.org.au, 1300 22 4636), Lifeline (24/7 crisis support and suicide prevention services for those experiencing emotional distress, lifeline.org.au, 13 11 14), headspace (24/7 confidential support if you are feeling worried or having a difficult time, headspace.org.au), 1800RESPECT (24/7 national sexual assault, family and domestic violence counselling line, 1800respect.org.au, 1800 737 732), and MensLine Australia (MensLine Australia, mensline.org.au, 1300 789 978). At the bottom of the page, there is a footer with '© 2024 Pioneera' and links for 'About', 'FAQs', and 'Technical Support'.

