URIM Management Panel Fast Start User Guide

Version 15.0
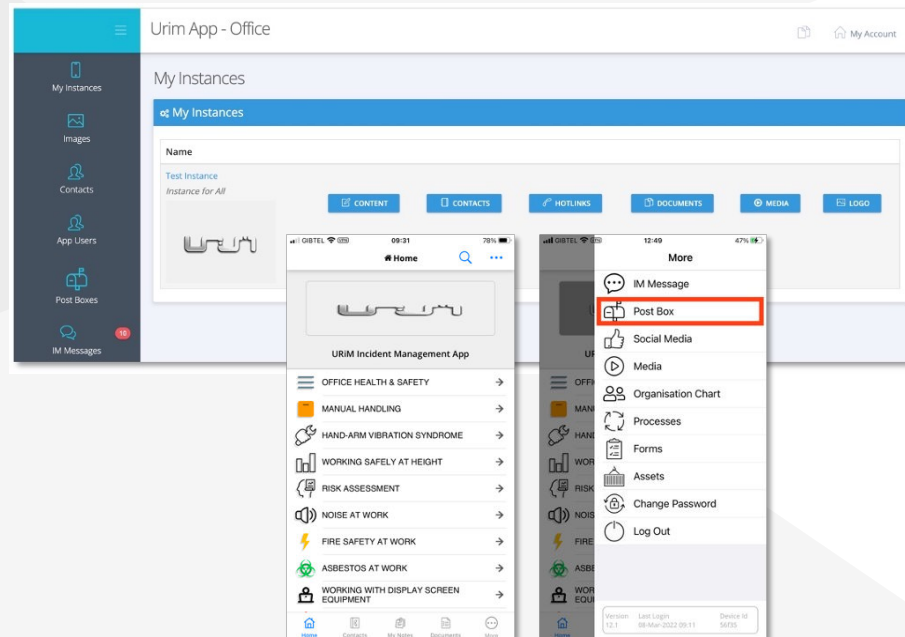
User Guide Contents

Topic   Page

Guide Objectives

Start Simple	Add Knowledge	Move Fast	Go Further

Start Simple

- Provide basic guidance about some easy-to-use techniques
- Provide an overview of some frequently-used functions
- Encourage User confidence by gaining familiarity with consistent system elements

Add Knowledge

- Build on basic navigation tips
- Compound knowledge, through system principles that complement each other
- Combine multiple sequences of actions into productive & powerful areas of growing system know-how

Move Fast

- Provide pointers to features and functions that support bulk actions, to make your workflow more productive
- Introduce you to reporting & display tools that allow URIM to interact smoothly with wider corporate systems & audiences
- Provide Group Management & bulk action pointers, as future pathways to enterprise-wide User engagement initiatives

Go Further

- Signpost additional tools and features that help take your learning journey to the next level
- Provide increasing familiarity with the URIM administration interface, to boost confidence with functions beyond those covered within this Guide
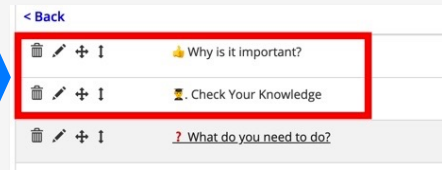
2. Add & Edit App Content

Navigating the Main Screen – Key Elements

- **Content** – Edit App Content (start here, by clicking on the blue box, on-screen)

- **Contacts** – This section is where you manage your App Contacts

- **Hotlinks** - Manage your useful Hotlinks here

- **Documents** – Upload & manage files within your Document "Library"

- **Logo** – Set your corporate Logo within the App, for all App Users
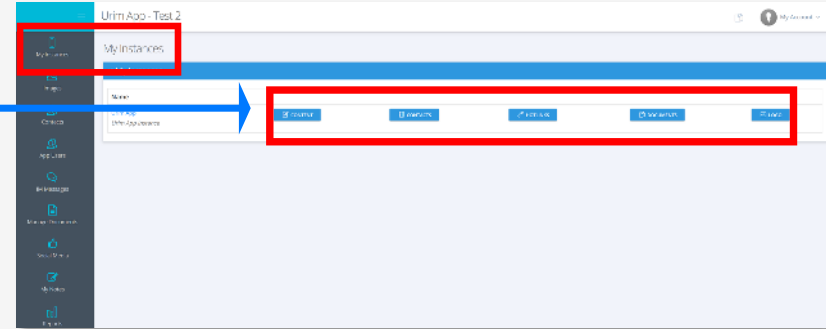
Editing App Content – Key Icons

- Navigation Arrows – move instructions around

- Trash – deletes all Instruction Content

- Pencil – edits various Instruction details

Adding App Content

- Content is added as Instruction "tabs". The new tab Text goes in Instruction box

- To link the tab to another Action, then select the relevant Action "Type". Type defaults to "None", meaning plain Text content only.

- Enter the relevant "Value" for your selected Type – Eg telephone number +44…

- After editing & configuring your Instruction correctly, then click "Submit"

- When all editing is completed, click the red "Apply Changes" button, located on the Main Manager Panel administration screen (called the "Home Page")
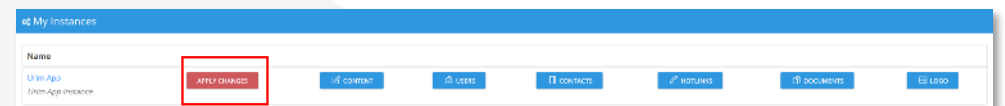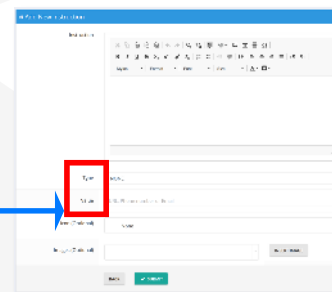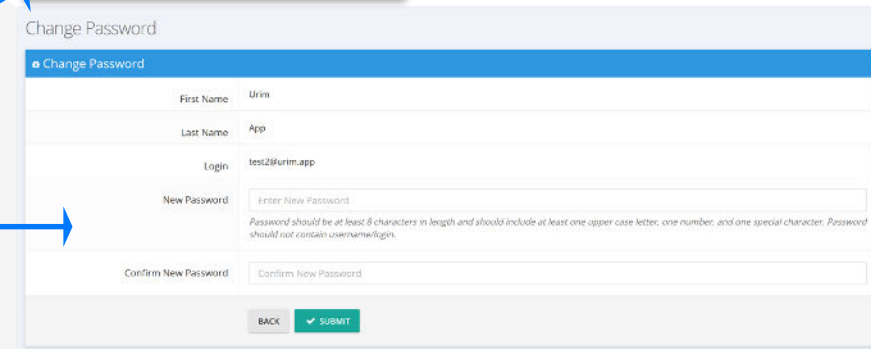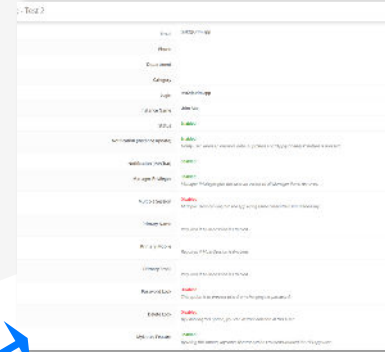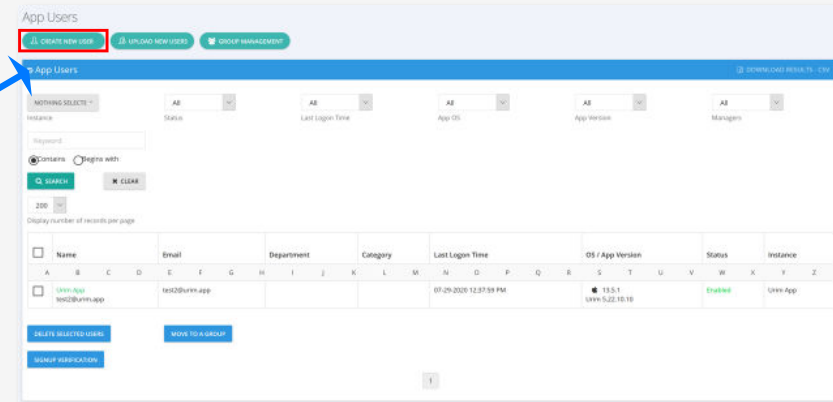
3. App User Setup

Adding a New App User

- Click on the "App Users" area of the left-side Menu, from the Home Page screen

- To add a new App User:
  - Click "Create New User" & fill in the correct App User information
  - Check email address & login address match & are correct
  - An email will be sent to the address, but **manual activation** may be needed

New App User Activation

- Depending on the security settings associated with the recipient's email account, the email may appear in their "junk" or "spam" folders.

- In some cases, corporate email security systems may block, or "quarantine" such emails, due to the embedded account activation web link, which the emails necessarily contain. In such cases, the email account admin@urimapp.com should ideally be whitelisted. Otherwise, manual User Account activation is necessary.

New App User – Manual Activation

- New User Accounts remain disabled, until activated, via email, or manually. This is editable under "Status", within the **User Profile** page for the Username. User Profile is accessible, by clicking on the relevant Username, in the App Users section.

- Users must create **minimum strength** passwords. Once correctly activated, the "status" within the Manager Panel changes from "disabled" to "enabled"

- Correctly activated Users can also access URIM via Microsoft Single Sign On (**SSO**). This option is available via a button on the URIM login screen, at the bottom.

3. App User Setup

Uploading Multiple App Users At Once

- **Activation** steps for adding a single New User, also apply to bulk User Uploads

- Click the "Upload New Users" button & follow the instructions on-screen. Bulk activation emails need to be clicked on within the initial 24 hour period.

- Resending activation emails, after link expiry, is achieved via the User Profile page. Click on the "Email Verification" green button at the bottom of the User Profile.
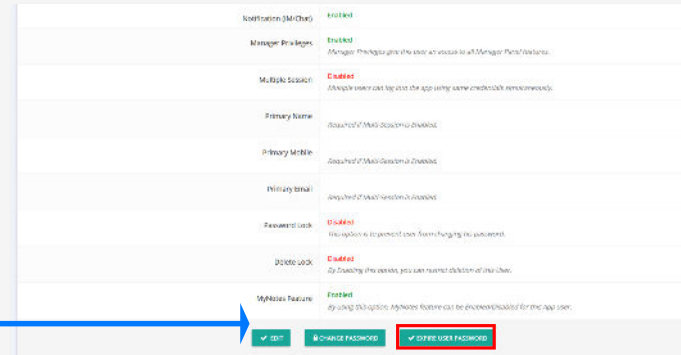
Removing App Users

- Click on "App Users" on the left-side Manager Panel menu

- Search for & select the Username(s) you want to delete, by clicking on the checkbox by the Username(s). A **tick** will appear in the checkbox, to confirm your selection(s)

- Click "Delete Selected Users" to delete the selected User records. After deletion, such Users can only be restored, by completing the 'Add User' process from scratch.
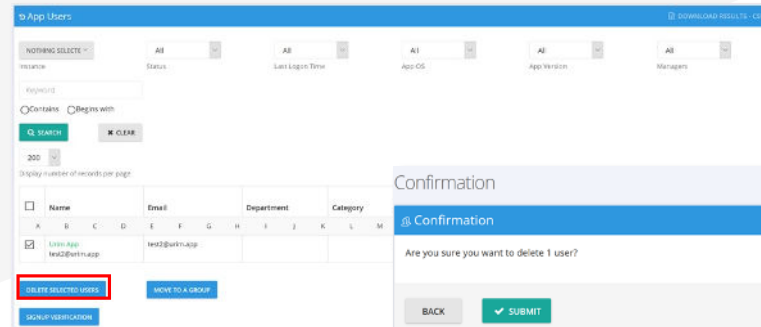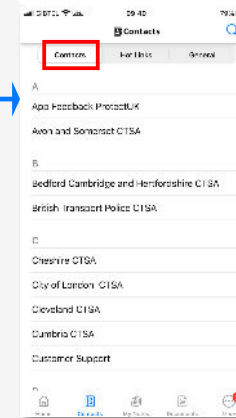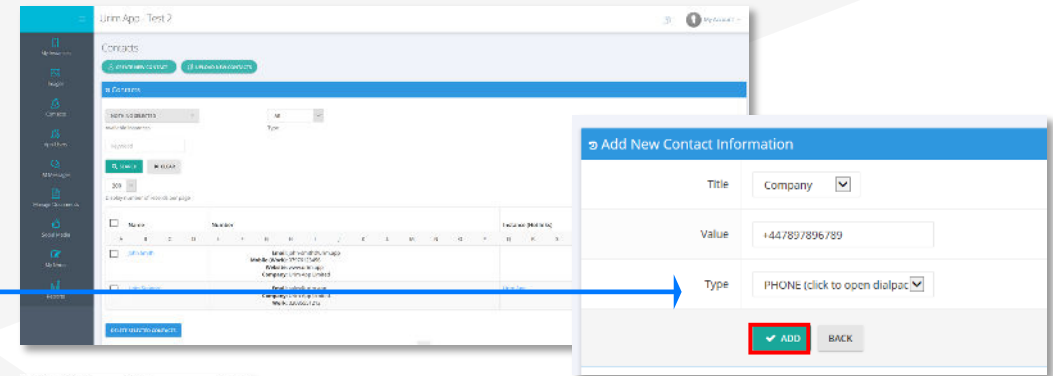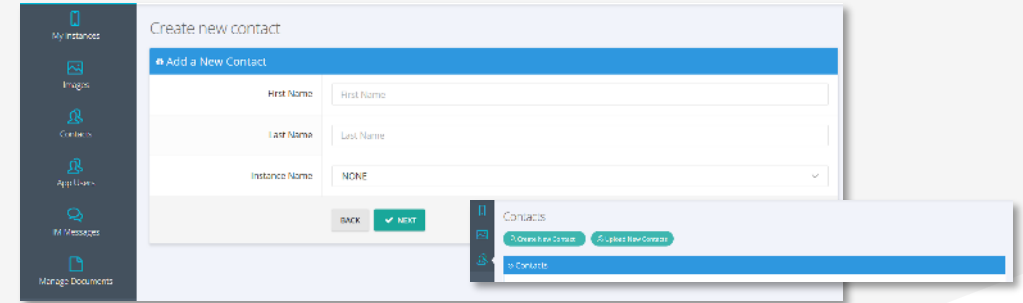
4. Contacts Setup

Contacts – Add/Remove

- Click on the "Contacts" tab, on the left-side Menu of the Main Manager Panel page.

- Click on the green "Create New Contact" button. This leads to a simple form for the relevant basic Contact details

Contact Details

- Fill in the relevant Contact information

- Select the suitable Instance name (if multiple options exist), then click "Next"

- Fill in the further Contact details in the given Data Fields, including the adding of any new Data Fields of various Types, available from the drop-down selection menu. Then select "Add"

Contacts Layout in the App

- The Contact details are then published to the App and will appear in the Contacts tab section of the App immediately. (Note: Adding Hotlinks is covered later in this Manual.)

4. Contacts Setup

Adding Multiple Contacts

- Select "Upload New Contacts"

- Select "Click here" which will ask you to download an Excel/CSV file

- To upload Contacts in bulk, you will first need to correctly populate the CSV file provided. Once that step is complete, "Upload" the finished file, which will then populate your Contacts information accordingly

Removing Contacts

- Click the "Contacts" tab on the left-side Menu of the Manager Panel

- Select the Contact(s) you wish to delete, by clicking on the matching checkboxes

- Click the "Delete Selected Contacts" button

5. Adding Hotlinks

First Add a Contact

- Ensure your target Contact is already added, via the Add Contact guidance above

- Ensure the Contact information is correct, then click "Next"

- Ensure the "Type" information is correct, eg the exact phone number, or web address in the "Value" section. Ensure your phone number is in the standardized international +… format. This will ensure it works on all standard mobile phones.
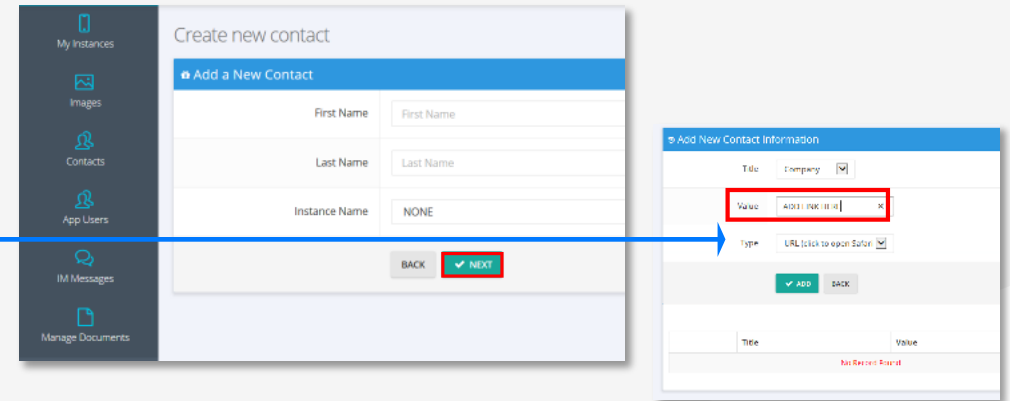
Make a Contact into a Hotlink

- From the Main Menu page, select the **blue** Hotlinks button

- The left-side panel shows the available Contacts to choose from. Scroll down to the relevant Contact(s) that you want to make Hotlink(s) & click on it, within the panel.

- The Contact record selected should now appear in the right-side panel as a Hotlink. To remove a Hotlink, simply click on that record, in the right-side panel, to undo.
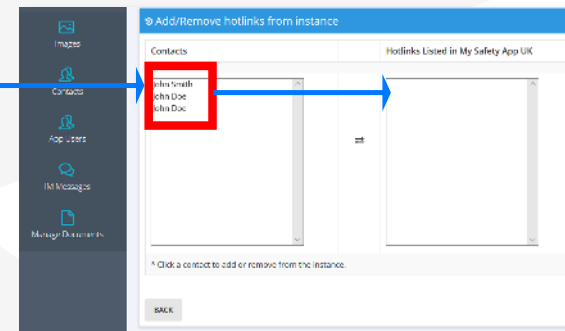
Hotlinks Display in the App

- All activated Hotlinks will appear replicated within the Hotlinks tab, within the Contacts section of the App
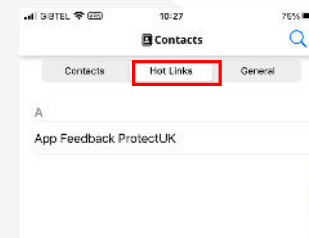
6. Instant Messaging

Instant Messaging – Initiating a Message

- Instant Messages (IM's) can be initiated via the Manager Panel

- Select "IM Messages" from the left-side Menu & then "Create New Message" button

- You can select individual Recipients, Groups of Usernames, or upload a simple CSV Username list on-the-fly. Any Groups must be **pre-built** & configured.

- Search for specific Usernames from the List, using the "Search" function. Select any Username(s) by clicking on the checkbox next to the Username. The checkbox at the very top of the list selects all Usernames at once. A counter shows the Total.

- **Note**: there is a checkbox at the top of the Page List, which selects all records on that page – for example, all those Usernames matching specific Filter/Search terms.
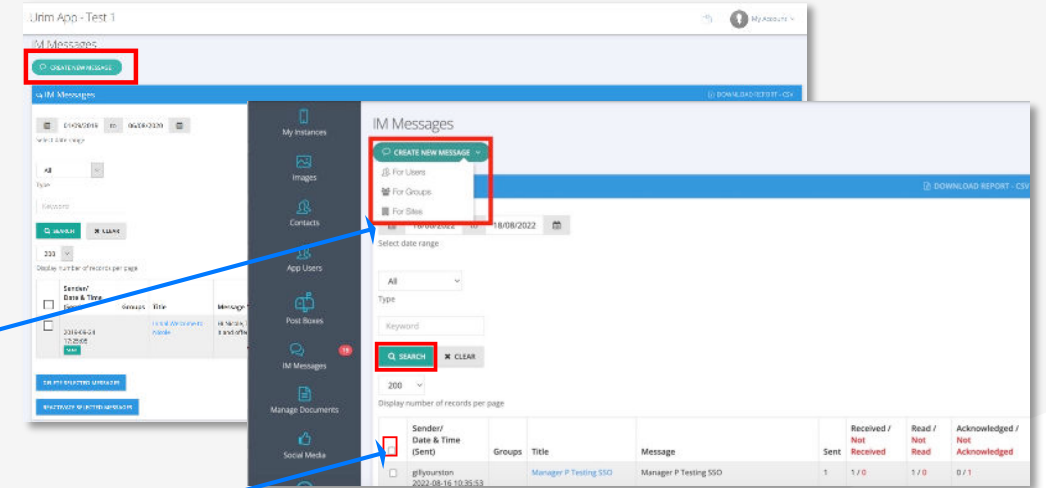
## Instant Messaging – Creating a Message

- Type the Title of the Message. This is the Title that Recipients will see in the banner of the Push Notification alert, received by the User Device (where PN's are allowed)

- Type in the message content & edit the other message Settings as required. You can select Attachments from your list of Public Documents. These will be embedded.

- You can either allow User Replies where needed, or send the IM as "Read Only"

- Once you click "Submit", you will directed to a processing page, where you can track the ongoing status of your Sent IM's. You will need to refresh your browser screen to update the information displayed, to the latest available information from Users.

- (If multiple copies of User responses show on-screen, simply **refresh** your browser)


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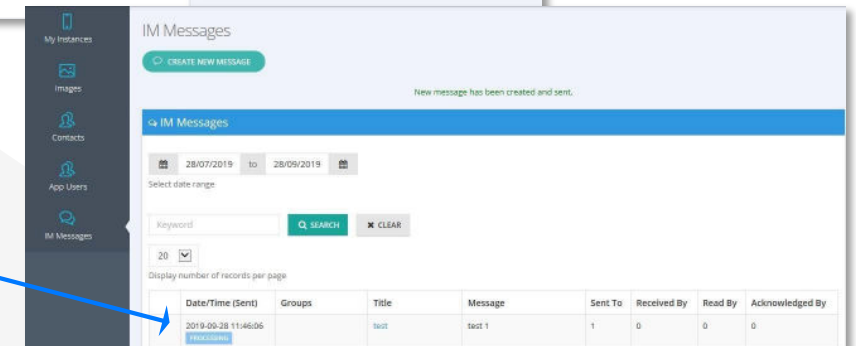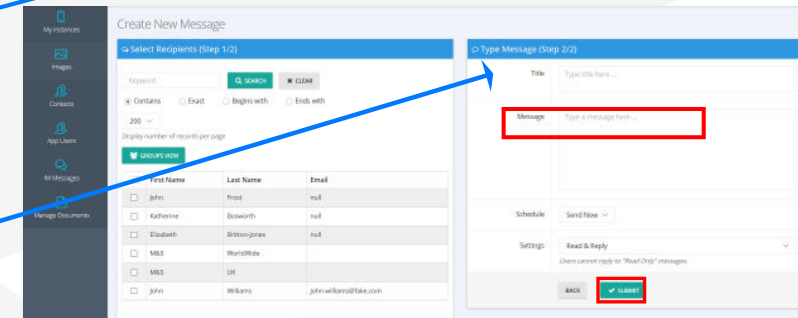
6. Instant Messaging

Instant Messaging – How the User Views the Message

- Users who <u>allow</u> Push Notifications (PN's) will receive banner alerts on their device "lock screen", that an IM has arrived, showing the Title & <u>some</u> lines of the message.

- On the URIM App "tile" icon, unread messages are also displayed with a red counter button, on the top-right, with a number showing how many messages are left unread.

- A red button counter icon also appears against the "More" Menu icon in the App.
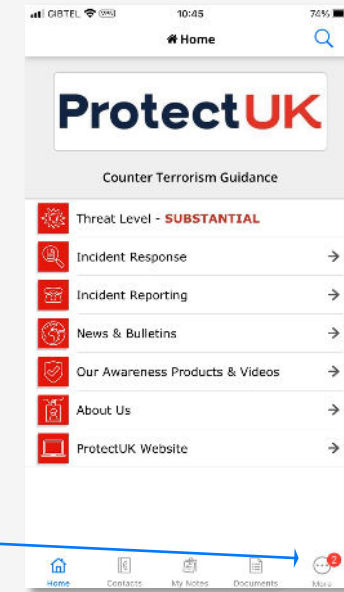
Accessing Received Instant Messages

- IM's are accessed via the "More" Menu button, on bottom-right of the Home Screen. Then select "IM Message" option from the slide-out Menu (note blue counter icon)

- This takes Users to the IM List page, displaying IM's in order, most recent at the top. Unread IM's will have a counter next to them. Each IM works like a self-contained chat history, so in some cases, multiple message "bubbles" appear in a single IM chat. Note that IM content can be **dynamic**, eg email addresses, web links & attachments
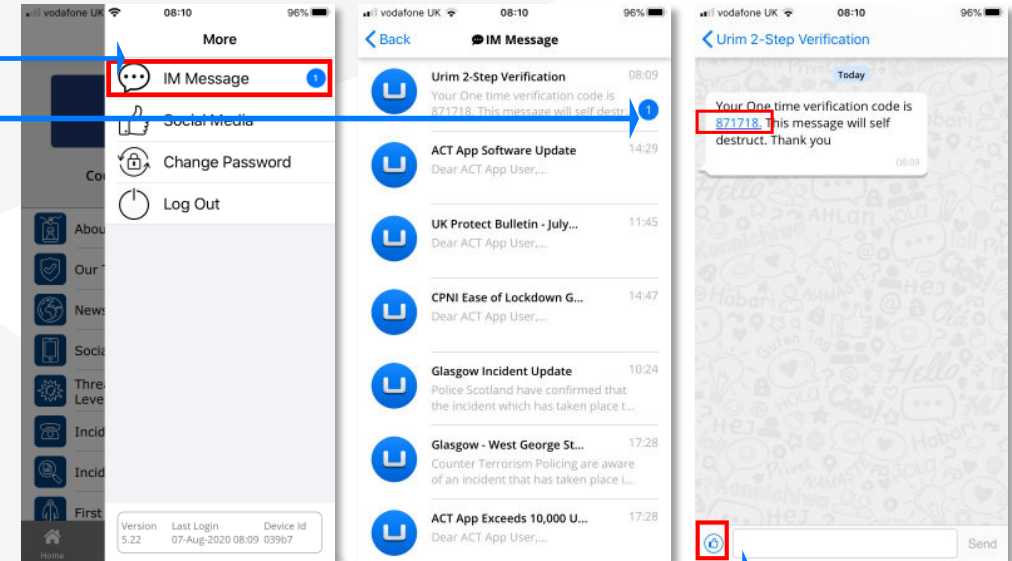
Replying to an IM

- The IM sender sets whether any IM can be replied to, by Recipients. Where this is permitted, each Recipient effectively enters a private Chat with the Manager Panel. Hence the central Administrator can see responses, but other IM Recipients cannot.

- Where IM responses are not permitted, the App User will receive a pop-up message ("!") warning them that such a response action was not permitted. Note the thumbs-up icon to the left of the Text response window, allowing certain pre-set responses.
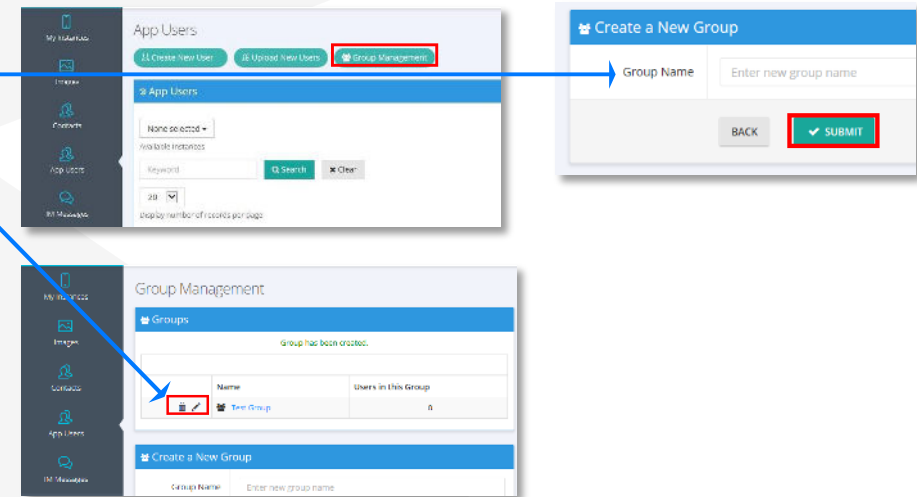
6. Instant Messaging

Instant Messaging – Tracking the Message

- To track progress on sending IM's to a list of Recipients, click on any IM Title from the list. This will take you to an on-screen report of that IM's delivery progress.

- Message Status, per Recipient, can be tracked, with associated action timestamps. Where replies & responses have been permitted and received, you can drill down into the individual Chat History with that Recipient, to view their Response(s).
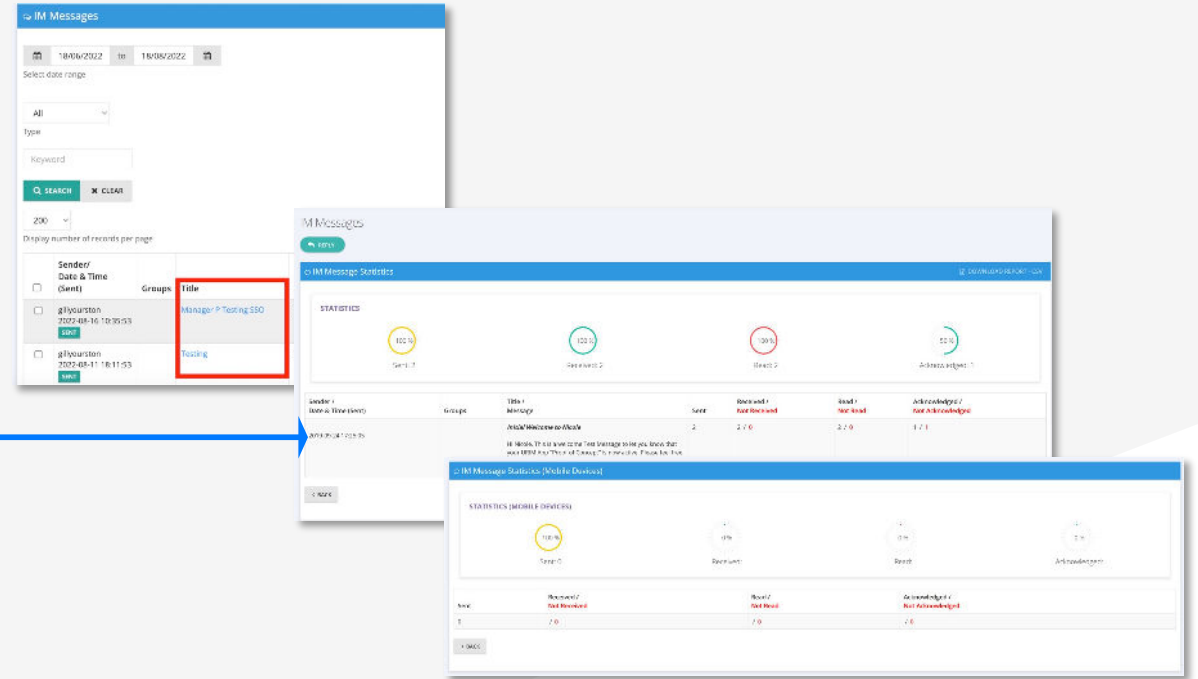
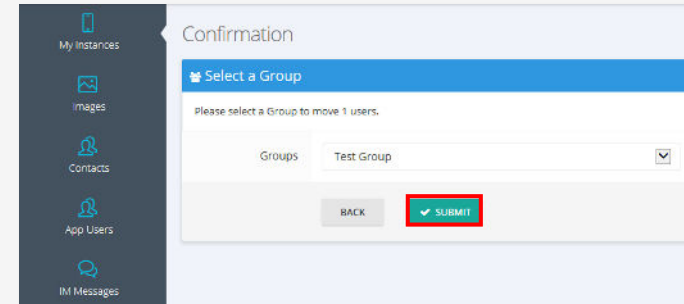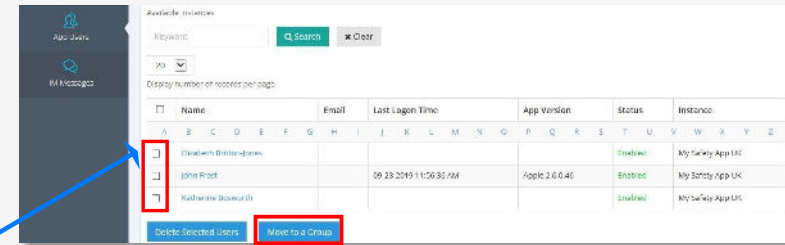## Instant Messaging – Sending Messages to Target Groups

- Where IM's are to be sent to Groups of Recipients, those Groups must first be created. This is achieved through the App Users/Group Management functions. Create a Group, give it a relevant & distinct Group Name, then click "Submit".

- That Group Name will now appear under "Groups", for you to access & edit. Click on the pencil icon to Edit Group Membership, through standard addition & deletion.

6. Instant Messaging

Instant Messaging – Add a User to a Group

- Simply go to "App Users", locate the Username(s) you want to add

- Click the matching checkbox, then click "Move to a Group" button for those selected User(s), then select the desired target Group, from the displayed drop-down list.

- Then click on the **green** "Submit" button

## Instant Messaging – Sending a Message to a Group

- Click on "IM Messages" on the left-side Menu

- Select "Groups" as the sending option from the drop-down list

- Select the Group(s) you wish to send to, from the available list of Group Names

- Then proceed to complete the Message portion of the screen (on the right side), including all relevant **Message Settings**. Finally, click "Submit" to send the message.
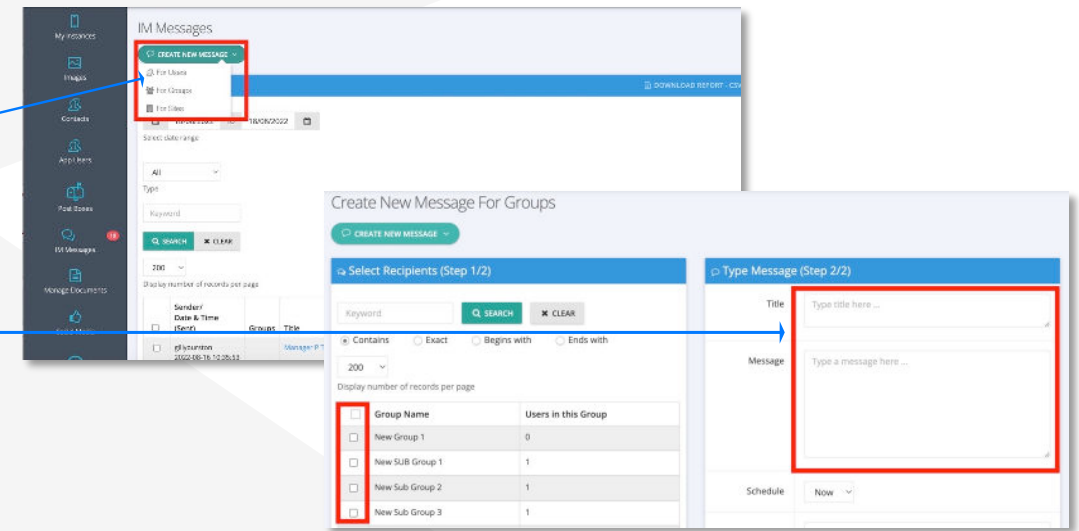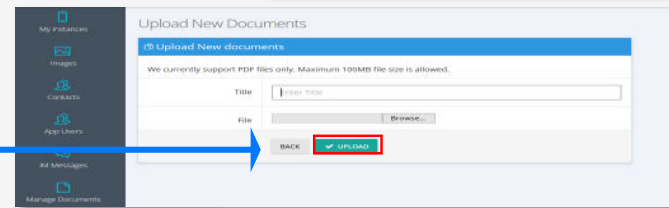
7. Manage Documents

Adding a Document

- Select "Manage Documents" from the left-side Menu, at the main Home Page

- Click the "Upload New Documents" green button
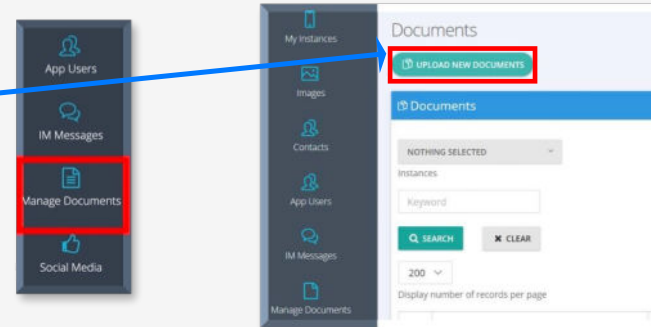
Document Details

- Type the Title of your Document

- Browse your device file library for the PDF/Excel file you wish to upload

- Click the **green** "Upload" button (note the 100MB maximum file size limit)

- The Document now appears listed in your Library of uploaded Documents

Publishing a Document

- Uploaded Documents still need to be Published, in order to be seen within the App.

- From the Manager Panel Home Page, click the **blue** Document button

- Unpublished Documents appear in the left-side display panel. To Publish any uploaded Document, simply click on the Document name, within the left-side panel. It immediately moves to the right panel & appears in the App after "Apply Changes".
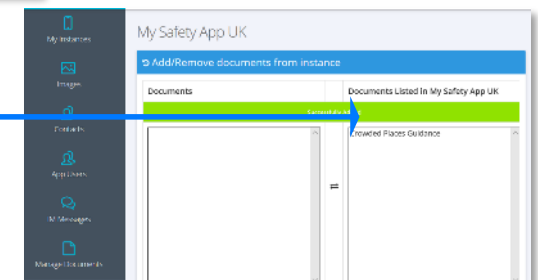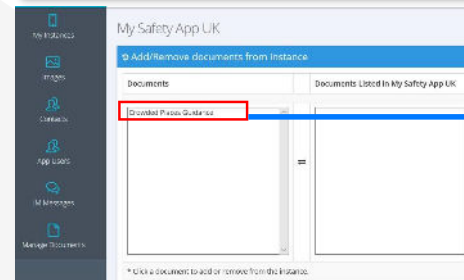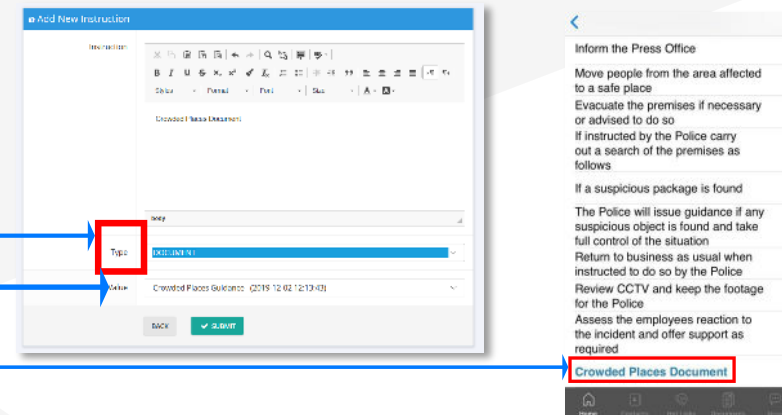
7. Manage Documents

Document & Folder Layout in the App

- Published Documents appear in the relevant section of the User's App. There are Public, Private & Restricted Folders, located within the App "Documents" section.

- Clients can build their **own** additional Folders structures, beyond these 3 categories. If present, these will appear as Client-named Folders in the Documents section.

- Folders administration functions are accessed via the "Folder Management" button.
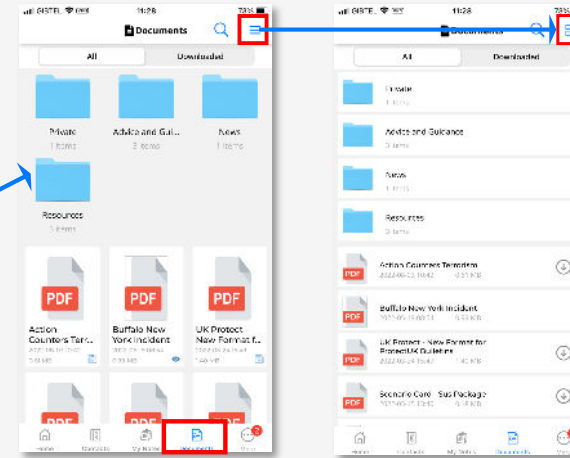
Linking a Document to an Instruction Tab

- Documents (and other items) can be dynamically linked to Instruction Tabs in Apps.

- Select the Page location & Instruction tab that you want to link a Document to. Then click on the pencil icon, to Edit that instruction tab. This opens up the configurable elements of that Instruction, including the "Type" setting.

- Select the "Document" Type, then select the specific Document you wish to link to, from the drop-down list in the "Value" section. Click "Submit" to confirm changes. The selected Document will now become a clickable App link, from that Instruction.

Removing a Document

- Select "Manage Documents" from the left-side Menu. This lists all your Documents.

- Select the Document(s) you wish to delete, using the checkbox next to it. Click "Delete Selected Documents". Following "Apply Changes", all Apps will be updated.
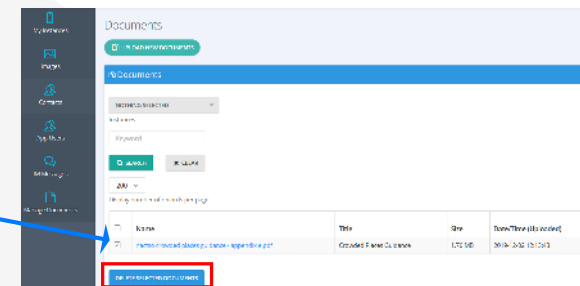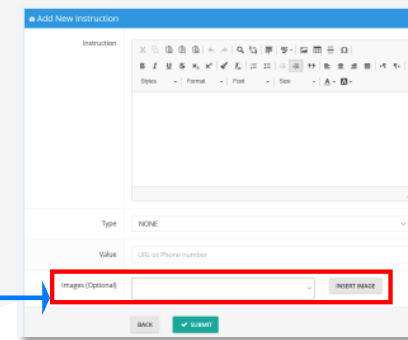
8. Images

Uploading an Image

- URIM supports JPG & PNG file types, up to 1MB in size

- Select "Images" from the left-side Menu. Click the grey "Browse" button, to navigate around your Device, to select the relevant Image file that you wish to upload.

- Type in the Title you wish to give the Image File within the App, then click "Upload". Your Image should then appear under "My Images", lower down the page.
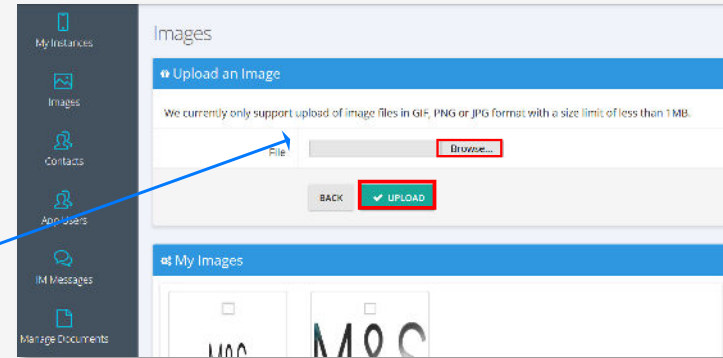
Linking an Image to an Instruction Tab

- To be used in the App, any Image must first be included within your **Image Library**.

- From the Home Screen, click the **blue** Content button & then navigate to the exact place where you wish to include an Image. This will be achieved by embedding the Image within an Instruction tab. (Note: Images only display in **Portrait** mode)

- Within the Instruction, select the "Images (Optional)" box. Then select your Image from your drop-down Library list of options available. Click "Insert Image" button.

Inserting/Resizing an Image

- Having inserted your Image successfully, it will usually need to be **resized**. Resizing tools vary with different web browsers used. Some will allow the dragging of 'handles' at the corners of the Image. Others will not.

- Double-clicking on the Image will take you to the **Image Details** screen. Here, you can adjust numerical values for the Image. Changing Width **auto-adjusts** Height. Width of '300' works well for most phone screens. * Cross-check this via the App.
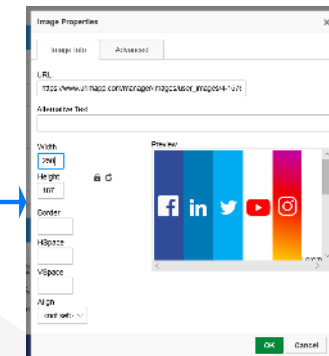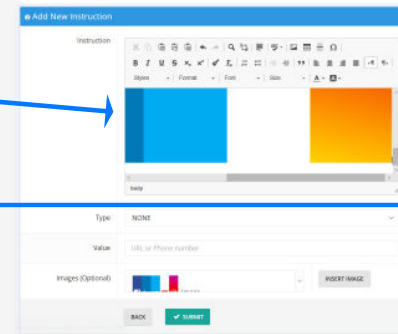
8. Images

Image Layout Inside the App

- Always **cross-check** appearance of Images within the App & adjust dimensions to fit.

- For <u>detailed</u> Images, an additional dynamic link to a full **PDF** Document of the Image is recommended. PDF's allow full **pinch/zoom** actions, for closer Image inspection.

- Always "Apply Changes" to make all adjustments visible & published within the App.
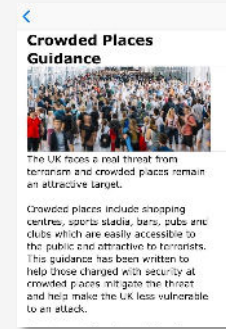
9. Reports

Reports – User App Login Activity

- At the bottom of the left-side Menu, **hover** the mouse cursor over "Reports" & then sub-select the "Users App Activity" Report option. Note other Report options. All Reports operate in a similar way, with consistent settings & layout formats.

- Select your Report, target time/date ranges & other search/sort **filters**, as needed. The **Activity** Report defaults to the last 30 mins & lists all successful Login attempts for the period, together with associated details, as allowed by User Settings choices.

Reports – Download Report as CSV

- As is consistently the case across the URIM platform, on-screen Reports can be downloaded to your Device, in CSV format, for further manipulation in Excel etc.

- Look out for the blue "Download Report" button, for any on-screen Data Report. Clicking on this button will download the full set of associated Data, to your local Device, via your browser session. (Note: this download process varies, by browser).

- Open the downloaded CSV file & continue to apply various additional Data manipulations via Excel, or similar, as required. Note that you may need to "Save As" a different file type, to **retain** additional features only available in XLSX, rather than CSV, for example.