

Firstbeat Lifestyle Assessment User Manual

May 2018

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Introduction

This manual contains instructions and information about the new Lifestyle Assessment, including step-by-step instructions for how to conduct a Firstbeat Lifestyle Assessment. The software can be used with both Bodyguard 2 and the old Bodyguard device. For Bodyguard 2, you need to install the Firstbeat Plugin on your browser. When using the old Bodyguard device, you will need a separate Firstbeat Uploader tool. Instructions for installing Firstbeat Plugin and Firstbeat Uploader can be found in this manual. Before you attempt to make the installations, make sure you have administrator rights for your computer. If you experience any problems with this, you need to get in touch with your company's local IT-support.

Both servers function concurrently, so you can sign-in in the same address (www.lifestyleassessment.com) and with the same credentials. Also the same profiles and measurements are found in both the new and old Lifestyle Assessment.

Partner Extranet **(www.firstbeat.com/partner-extranet):**

In the Partner Extranet, you will find, for example, marketing materials, the Learning center, and webinar podcasts.

The Learning center includes all instructions for conducting a complete Lifestyle Assessment service.

You can sign in to the Partner Extranet with your Lifestyle Assessment credentials.

The Learning Center can also be reached from the main page of the Lifestyle Assessment by selecting **Tools > Learning Center**.

In Firstbeat Lifestyle Assessment -related questions, please contact Firstbeat support via email: support@firstbeat.fi or via phone: +358 841 541 541 (Mon – Fri 9 am to 4 pm GMT + 2). From our web pages you can also find our support site: www.firstbeat.com/support/

1. System requirements

Works in Windows 2000, XP, Vista and 7 operating systems
(Win 98 and ME operating system functionality has not been tested)

RAM memory at least 512 MB

Processor speed minimum 1 GHz

Display resolution at least 1024 x 768 and 16-bit color package

Free hard disk drive space at least 50 Mb

Software: Adobe Acrobat Reader 5.0 or newer

USB port

Internet connection

Compatible devices:

- Firstbeat Bodyguard 2.0
- Firstbeat Bodyguard (needs Firstbeat Uploader tool)

2. Getting started

2.1. Logging in

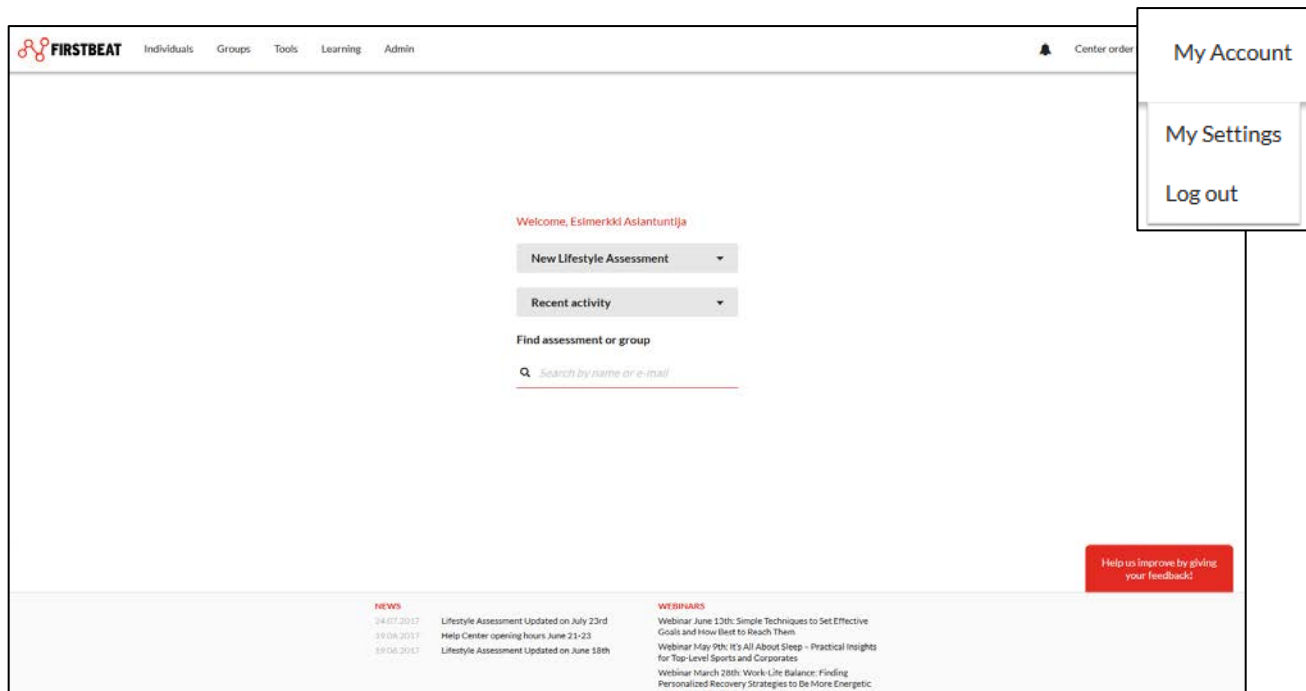
You can log in to the Firstbeat Lifestyle Assessment at www.lifestyleassessment.com. You will need personal login credentials, which will be sent to you via email when you purchase access to the account. Write the user name and password to the appropriate fields. Select the desired language above the *Login* window and click *Login*.



When you login to the program the first time, you will get a *Welcome dialogue*. Please fill in your name and email address and select your default language. Change your password, and if you wish, you can also change your user name.

2.2.Home page functions

The home page of the Lifestyle Assessment provides access to all the functions that are required for conducting Lifestyle assessments or downloading programs. You can find *My Account* button from the upper right corner of the page. Via that button you can logout and change the settings of your own user account.



The latest Firstbeat news and upcoming webinars can be seen at the bottom of the page. By clicking these headlines (links), you can access the full story or document.

From the low right corner of the view you can find feedback from. Via this form you can send us feedback about Lifestyle Assessment.

Under your *Person information* settings (*My settings*) you can change your login credentials. You can also set a signature to the automatic emails (marked with red).

MY SETTINGS

Person information Settings

First name

Last name

Language What effect does this have?

E-mail Show in e-mail signature

Phone Show in e-mail signature

Username

[Change username/password](#)

Save Cancel

In the *Settings* tab you can select the time zone and desired date format. You can also choose if you want to create Physical Workload report only from worktime and if the Training Effect boxes should be shown on the Lifestyle Assessment reports. Additionally, if you have Firstbeat Center or Center + service in use, you can select if you want an email notification when your client's measurement is uploaded to server in Center or when Firstbeat has created reports.

MY SETTINGS

Person information Settings

Timezone

Date format 26.07.2017 26 Jul 2017

Create Physical Workload report from worktime only

Show the Training Effect boxes on the Lifestyle Assessment reports

Receive e-mail notifications when

Firstbeat creates reports

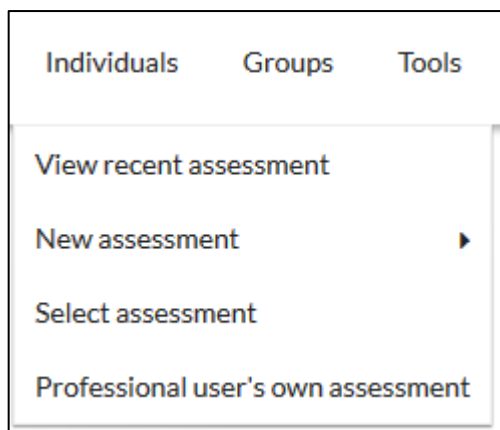
Firstbeat adds notes to assessment.

Save Cancel

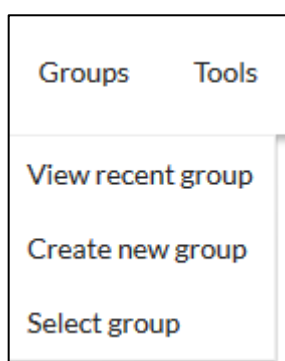
If you make changes to the settings, remember to click *Save*.

On the top of the main page you will find a navigation bar.

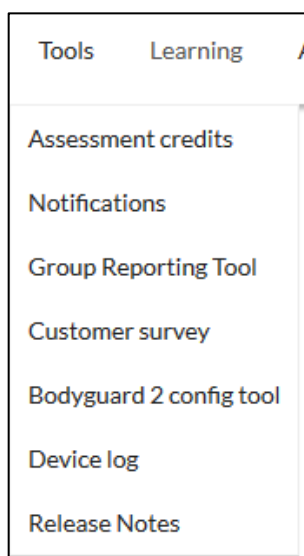
You can view a recent assessment, start a new assessment, select an assessment or start a measurement on yourself under the *Individuals* tab.



Via the *Groups* tab you are able to open the recent group, create new group or select one of the already existing groups.



Via *Tools* tab you can check your account's assessment credit statistics and possible notifications, open the Group reporting tool, Customer survey results, Bodyguard 2 config tool and Device log and check the latest release notes.



Note! New notifications related to your assessments will be shown also in the main page of the Lifestyle Assessment. Notifications will be given for example when our clients measurement has been uploaded to server and it needs to be analyzed.

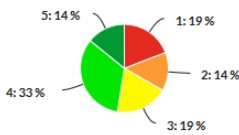
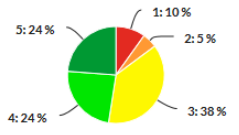
Customer survey results will be shown after there are at least 10 answers to the survey. The survey is sent to your clients after their lifestyle assessments are ready. You can edit the survey sending date for individuals and groups separately. More about setting the surveys can be read from chapters **3 Individuals** and **4 Groups**.

CUSTOMER SURVEY RESULTS

Results Informal feedback

Select group OR From To

21 responses were found with given search conditions.

I gained valuable information about my personal stress factors.	I would like to take part in a new Lifestyle Assessment for example in 6 months.	
YES 86% NO 14%	YES 67% NO 33%	
I gained valuable information about my recovery.	I would recommend the Lifestyle Assessment to others.	
YES 57% NO 43%	YES 43% NO 57%	
I gained valuable information about my physical activity habits.	Lifestyle Assessment results were easy to understand. (1-5)	How would you evaluate the Lifestyle Assessment service as a whole? (1-5)
YES 71% NO 29%		
I made at least one change in my lifestyle/habits as a result of the Lifestyle Assessment.	Average: 3.1	Average: 3.5
YES 48% NO 52%		
The Lifestyle Assessment helped me boost my personal well-being.		
YES 52% NO 48%		

With Bodyguard 2 config tool you can check the device memory and battery states, clear the device memory and sync device clock with your computer. You can also check the amount of measurements done and the firmware version of the device.

FIRSTBEAT BODYGUARD 2 CONFIG TOOL

Serial number	Device time	Memory in use	Battery charge	Measurement duration	Firmware version	Time zone
BG35140265	26.07.2017 12:39 <input type="button" value="Synchronize"/>	1% <input type="button" value="Clear"/>	100%	77 (74d 13h 54min)	1.38	UTC+3 <input type="button" value="v"/>

Device log shows you all the Bodyguard 2 devices used in your account. You can also check the current and latest assessments were the device has been prepared to.

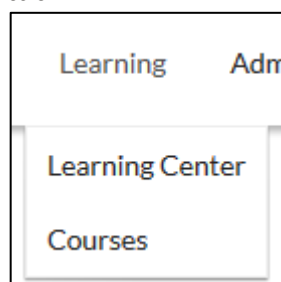
DEVICE LOG			
Device ID	Ongoing assessment	Previous assessment	
BG21140274	-	ESSE ESIMERKKI 21.04.2015	View
BG21140307	-	report comparison 21.04.2015	View
BG21140311	-	Mary Bloomer 21.04.2015	View
BG21140286	-	Esko Esikoinen 21.04.2015	View
BG21140312	-	21.04.2015	View
BG271400482	-	21.04.2015	View
BG241300969	-	Tim Black 21.04.2015	View
BG35140957	-	Aku Ankka 21.04.2015	View
BG21140291	-	Kate Burrows 21.04.2015	View
BG391300414	-	Essi Esimerkki 13.11.2014	View
FB090424	-	Ässä Ässänen 25.03.2012	View
FB100577	-	Maila Mallinen 21.03.2012	View

Search by name or device ID

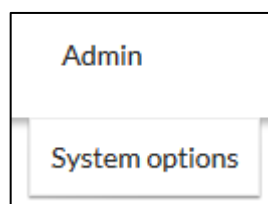
Close

Via *Learning* tab you can enter to Learning Center from where you can find lot of useful material about Lifestyle Assessment.

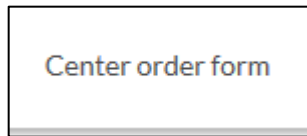
Note! If you are conducting Lifestyle Assessment courses you can find them also under the Learning tab.



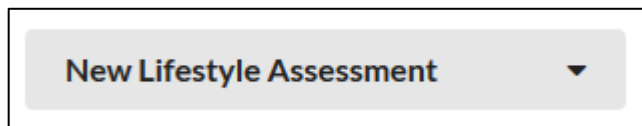
Via the *Admin* tab you can open *System options*. More about these options can be read from chapter 7. **System options**.



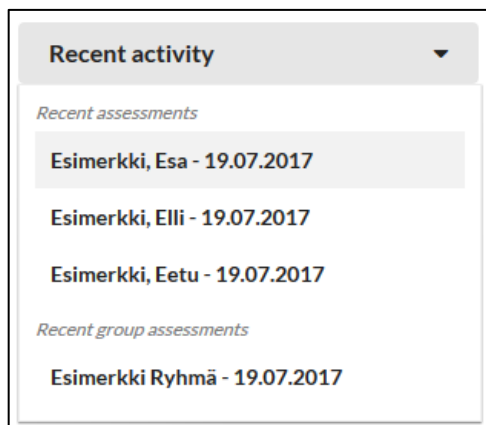
Center order form allows you to order devices from Firstbeat Center for your clients. More about this feature can be read under chapter **6 Lifestyle Assessment with Firstbeat Center**.



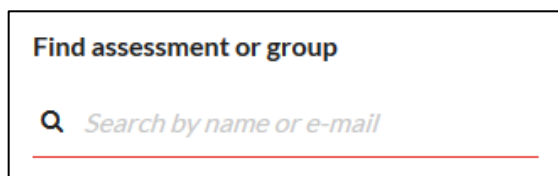
New Lifestyle Assessment tab allows you to create a new assessment either to a new or already existing customer. More about the assessment creation can be read from chapter **3 Individuals**.



Recent Activity feature shows you the latest assessments you have been working with. You can view the assessment by clicking it.



Find assessment or group field lets you search lifestyle assessments or groups from the server. When you write the name of your customer to the search field, the server lists all the assessments and the reports with that name.



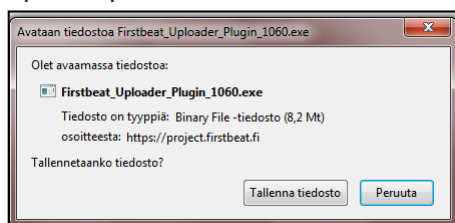
2.3. Firstbeat Uploader plugin installation

Firstbeat Uploader Plugin is required for preparing devices and uploading data from Firstbeat Bodyguard 2 directly in the Lifestyle Assessment server. The Plugin tool is downloaded from our web pages and takes app. 5 minutes, depending on your internet speed.

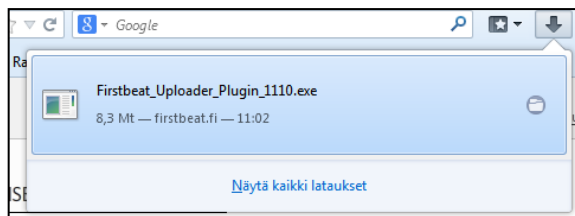
The installation packages of Firstbeat Uploader Plugin can be found [here](#).

The packages can be found also with following bath: www.firstbeat.com > Support > Lifestyle assessment professional users > Uploader downloads > Uploader Plugin for browser

When you have chosen *Download the Uploader Plugin*, press *Save file* on the window that opens up.



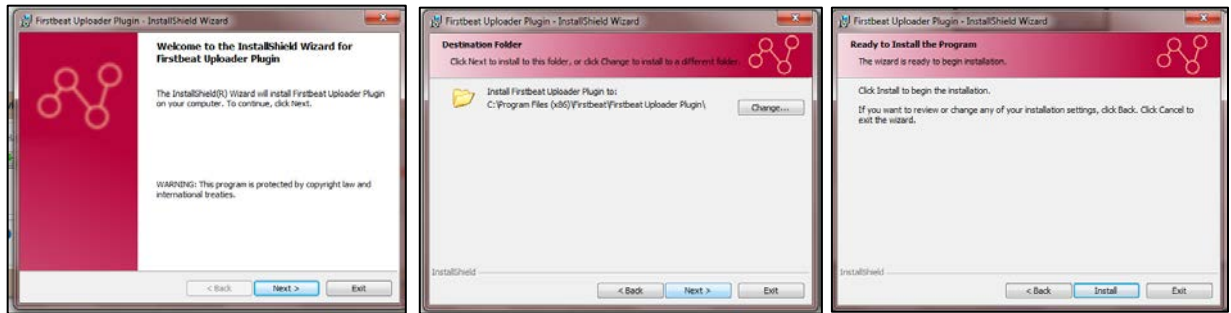
The file is downloaded to your computer and checked for viruses. If the file does not open in its own window, the computer's default is that the downloaded files are saved in the *Downloads* folder. If necessary, open this folder and bring the mouse cursor on top of the name *Firstbeat Uploader Plugin* and double click it.



In some cases, you will get a window informing you that an unknown program wants to use your computer. In this case, select *Allow*. The computer then asks you if you want to start the application.

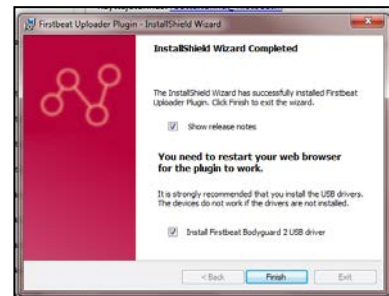
Note! The steps of installation may vary a bit depending on the browser you are using.

Please allow the following steps suggested by the pop-up windows. When the installation window opens, (picture below), proceed by selecting *Next*. In the end, press *Install*.



In the window that opens next, you can select the drivers to be installed. Select *Install Firstbeat Bodyguard USB driver*. Then press *Finish*.

Uploader Plugin has now been installed on your computer. In order to get the tool to work, please restart your browser.



2.4. Firstbeat Uploader installation

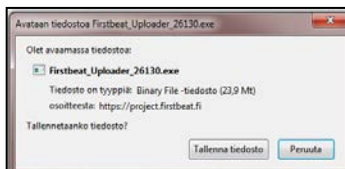
If you are using an older version of Firstbeat Bodyguard or some other measurement device, you will need to install a separate Firstbeat Uploader software on your computer for data upload.

The Plugin tool is downloaded from our web pages and takes app. 5 minutes, depending on your internet speed.

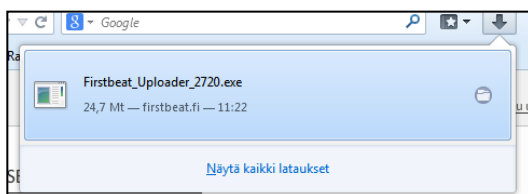
The installation packages of Firstbeat Uploader Plugin can be found [here](#).

The packages can be found also with following path: www.firstbeat.com > Support > Lifestyle assessment professional users > Uploader downloads > Uploader desktop tool

When you have selected *Download the Uploader software*, press *Save file*.

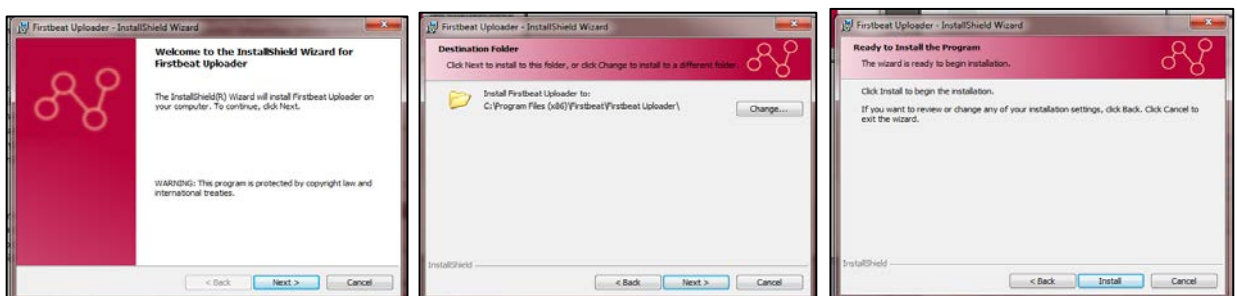


The file is downloaded to your computer and checked for viruses. If the file does not open in its own window, the computer's default is that the downloaded files are saved in the *Downloads* folder. If necessary, open this folder and bring the mouse cursor on top of the name *Firstbeat Uploader* and double click it.

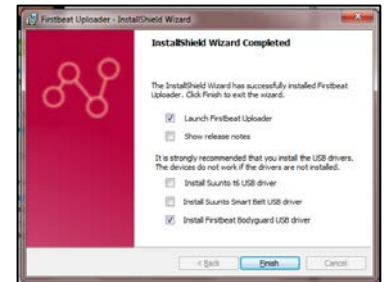


In some cases, you will get a window informing you that an unknown program wants to use your computer. In this case, select *Allow*. The computer then asks you if you want to start the application.

Please allow the following steps suggested by the pop-up windows. When the installation window opens up, (picture below), proceed by selecting *Next*. In the end, press *Install*.



The next window allows you to choose which device drivers to install. The recommendation is to install all drivers to allow you to upload data from all possible devices. At the same time, you can choose whether to launch the Uploader after the installation and if you want to open the Release notes. When done with selections, press *Finish*.



Next the drivers for Suunto t6 and Suunto Smart Belt are installed. If you did not select these drivers, you can skip the next section.

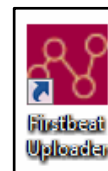
When the installation window opens, press *Next* in the next 2 windows. Please also note that **you should not plug in the device's USB cable** before the installation is completed. The Suunto driver installation is completed when the installation bar in the window is all green. In the end press *Finish*. The installation process for Suunto t6 and Smart Belt drivers is identical, so follow the exact same steps when installing the Smart Belt driver.



The Firstbeat Uploader installation is now complete. Click *OK*. If the release notes open up, you can close the pop-up window from the *Close* tab in the upper right corner.

When the installation is complete, you can login to the program. Your User name and password are the same as to the Firstbeat Analysis server.

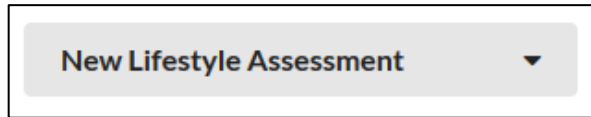
The shortcut to Firstbeat Uploader is now on your computer's desktop, allowing you to start it there whenever you need to.



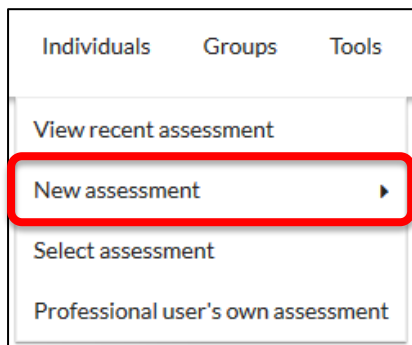
3. Individuals

3.1. Creating a new lifestyle assessment

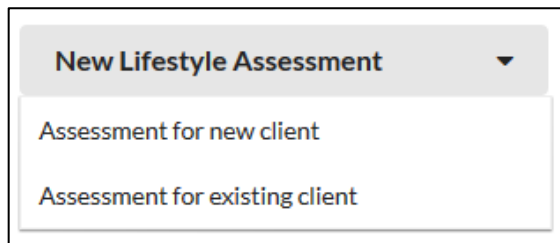
You can create a new lifestyle assessment either from the main page, via the *New Lifestyle Assessment* tab, or by selecting *Individuals* → *New assessment*.



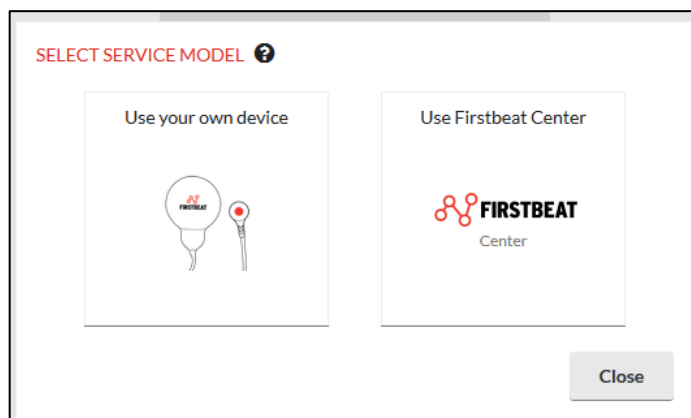
or



Select if you want to create a lifestyle assessment for a new or an already existing client.



Select whether you will use your own device or Firstbeat Center service. If you will use the Firstbeat Center, check more instructions from chapter **6 Lifestyle Assessment with Firstbeat Center**.



When you select assessment for a new client, fill in the assessment details in the opening window: name, language and email address of your customer. Set also the sending and expiration date for the link. If needed, you can also allow the client to upload measurements by him/herself via the journal link.

ASSESSMENT DETAILS

Client Edward Example

First name

Last name

Language ▼

E-mail

Journal link will be sent on

Journal link expires on

Professional user ▼

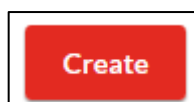
Service model Own device

Allow the client to upload measurements

Note! If you create an assessment to an existing client, check the assessment details and set the sending and expiration dates of the link. From this step forward, the process will be similar for new and existing clients.

The server will send an email to your customer that includes a link to the personal information form and journal. The email will be sent automatically on the date that you specified above. The language of the email is determined by the language that you choose in assessment details.

When you have filled the required information, click *Create*.



If there already exist profiles with the same name, the software asks if you are creating the assessment for an existing client.

Are you creating an assessment for an existing client? Select from below.

Name	E-mail
Eddie, Example	eddie.example@example.com

If one of the listed profiles is correct, click the name and select *Yes, create for selected client*. If you want to create a new profile, select *No, create new client*.

The assessment is now created. If you want to edit the assessment details, select *Edit*.

Eddie, Example - 28.07.2017

ASSESSMENT DETAILS

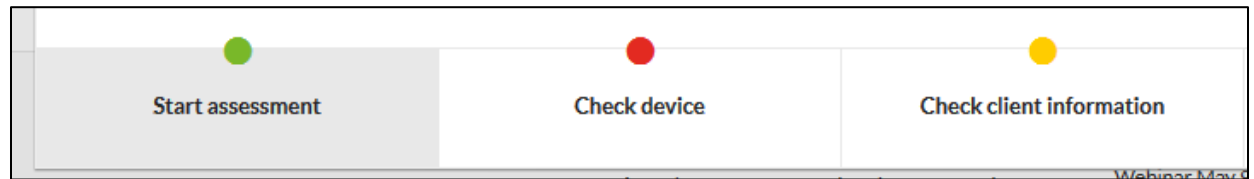
First name	Example
Last name	Eddie
Language	English
E-mail	eddie.example@example.com
Link will be sent on	28.07.2017
Link expires on	17.08.2017
Professional user	Esimerkki Asiantuntija
Use Firstbeat Center	No ?
I use my own device	Yes ?

The top left corner shows the name of the customer (marked with blue). From the same corner, you can refresh or delete the assessment.

From the *Close* button on the top right corner (marked with red) you can close the assessment window.

With the steps on the bottom border of the view, you are able to move across the assessment tasks.

When a certain task is ready, the mark above the step changes to green. Tasks not started are marked with white.



3.2. Checking a device

Before the device can be given to the client, it should be checked.

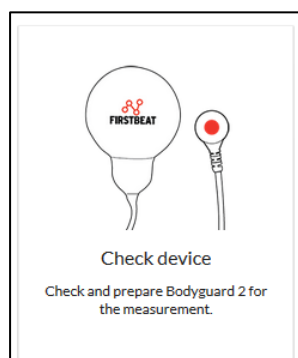
The checking

- confirms that the device has not been reserved for another assessment
- sets the device to the right time
- empties the device memory
- check that the battery of the device is full
- reserves the device to the desired assessment

The checking steps differ depending on whether you are using Bodyguard or Bodyguard 2; below you will find the instructions for both. Bodyguard 2 can be prepared in either way.

3.2.1. Firstbeat Bodyguard 2

1. Move to the *Check device* step and plug the Bodyguard 2 device to your computer's USB port.
2. Choose *Check device*.

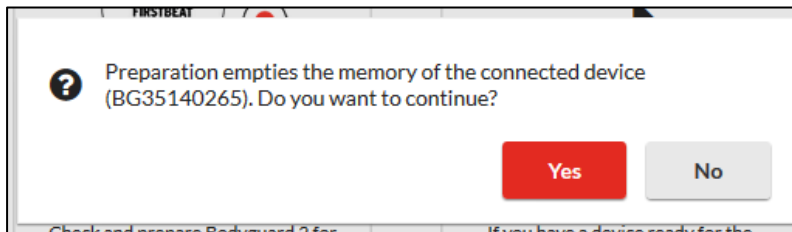


If you have already prepared some device to the assessment (for example with Uploader), select *Skip this step*.



If you have not yet installed the Firstbeat Uploader Plugin function on your computer, the program will ask you to do it now. From the window that opens up, select *Download Plugin* and follow the instructions (installation is also instructed at page 8 of this guide **Firstbeat Uploader Plugin installation**).

3. If the device contains measurements, the software makes sure if you want to continue.



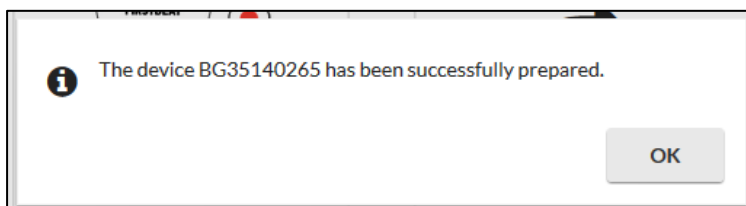
If you have already uploaded the measurements in the device and the device memory can be emptied, choose *Yes*. The preparation process will continue.

If you have not yet uploaded the measurements in the device or you do not want the device memory being emptied for some other reason, choose *No*. The preparation process will be discontinued.

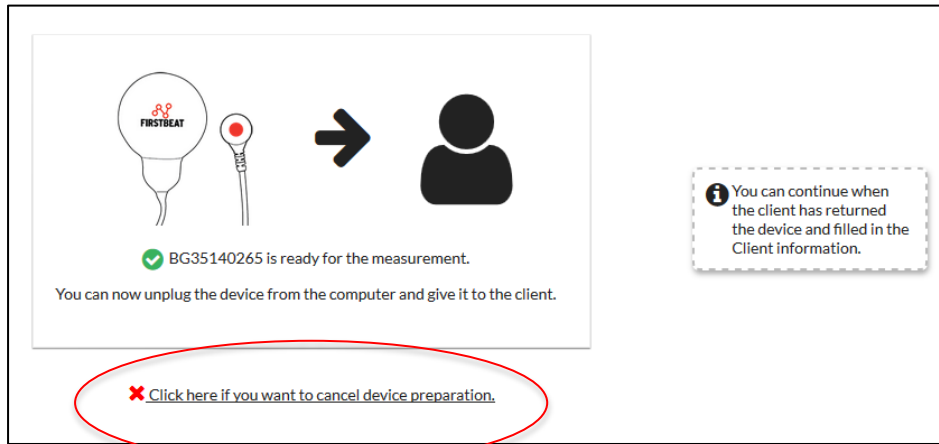
4. The program automatically starts to prepare the found device for the assessment that is open.

During the preparation process, the program also checks the battery charge of the device. If the battery is not fully charged, you will get a notification message (below):

When the preparing is ready, click *OK*.



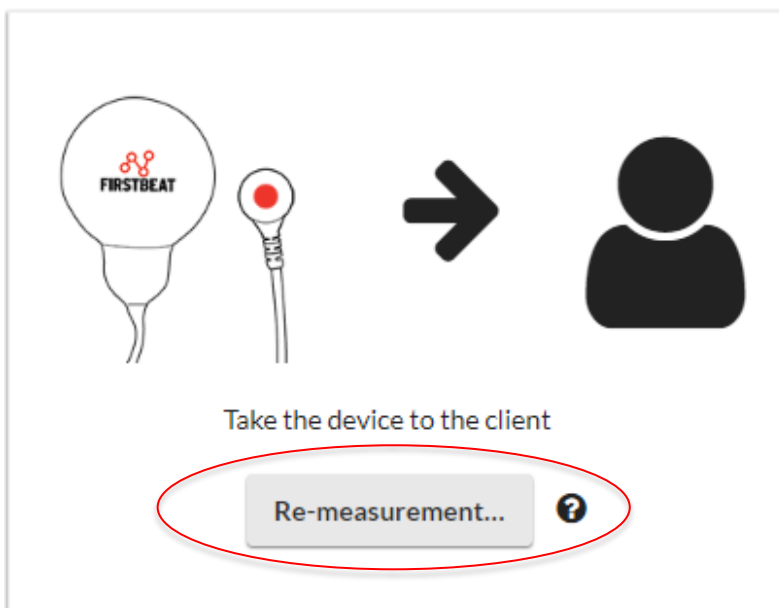
5. The preparing is now ready and you can give the device to your customer. If needed you can release the device by selecting *Click here if you want to cancel device preparation*.



If a client needs to do a re-measurement, e.g. due to an unsuccessful measurement, it can be done from the client's lifestyle assessment from *Check device* tab. Depending on whether you are using your own devices or the Center-model, you can choose *Re-measurement* or *Re-order*. Below there is an example of doing a *Re-measurement*. Instructions on doing the *Re-order* (Center-model) can be seen from page 78.

Re-measurement (own devices)

1. Go to *Check device* tab and click *Re-measurement*.
2. Select a reason and click on *Start re-measurement*. Add additional information if needed.
3. Check the device again if necessary.



Select the reason for the re-measurement for the client
Esimerkki, Eetu.

The measurement did not start / Empty device

The measurement ended too early

Lots of missing heart rate

Other reason

Additional information:

? [What is re-measurement?](#)

Start re-measurement

3.2.2. Firstbeat Bodyguard

When you are using an older version of Bodyguard, the preparation occurs via a separately installed Uploader program. You can also follow these preparation steps if you are using Bodyguard 2.

1. Prepare devices with the Firstbeat Uploader Tool. Open the Firstbeat Uploader from the icon on your desktop.

Note!

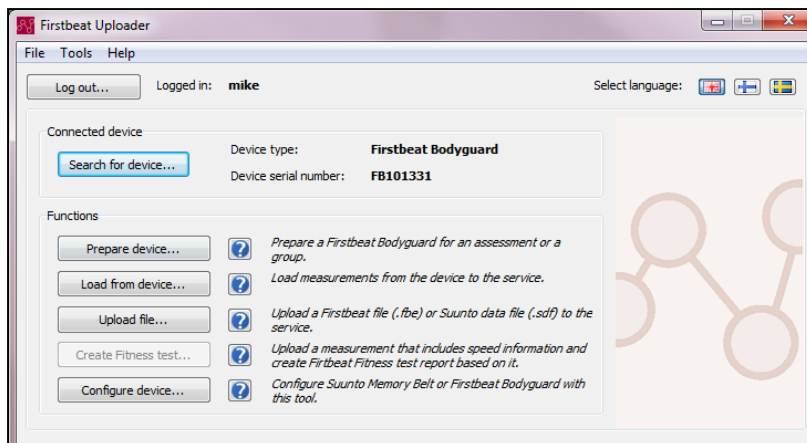
If you have not yet installed the Uploader on your computer, you can install it from our web pages and following the installation instructions (page 11).



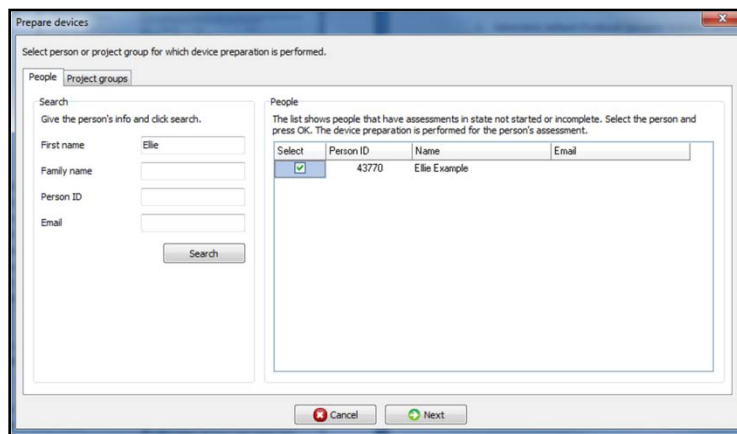
2. The Uploader will open a sign-in window. Sign in to Uploader with the same username and password that you used to sign in to the Firstbeat Lifestyle Assessment.



3. After plugging the device to the cable, select *Search for device* and then *Search Firstbeat device*. When the Bodyguard has been found, click *Prepare device* on the lower left corner of the view.

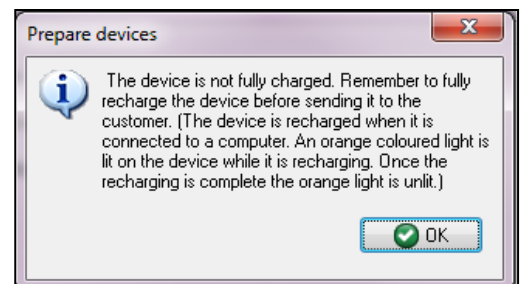


- From the list that opens, select the person for whom you wish to prepare the device and press *Next*. If only one assessment has been made for this person, the Uploader will select it automatically.

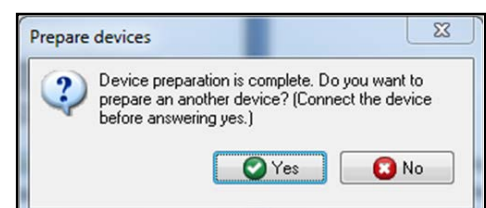


- Uploader will run through the preparation steps automatically. The steps include setting the clock, emptying the device's memory and reserving the device. If the device is not fully charged, the Uploader will remind you to charge the battery.

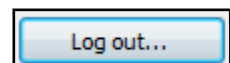
Note! The device has been charged long enough when the orange led has turned off. Charging the battery takes 1-2 hours, depending on earlier charge.



- The device has now been prepared and - if the battery is charged – is ready to be given to the client. If you wish to prepare other devices, plug in the next device and choose *Yes*. Otherwise, close the device preparation by selecting *No*.



After the preparation is complete, you can log out from Uploader by clicking *Log out* in the upper left corner.

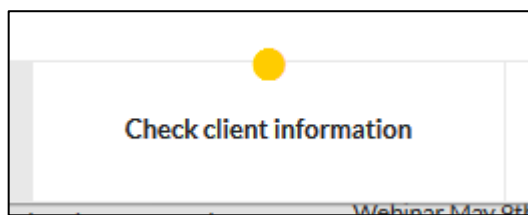


3.3. Client information (client fills)

On the first day of the Firstbeat Lifestyle assessment the client will receive an email message from service@firstbeat.fi with a link for filling out the pre-questionnaire, personal information, journal during the measurement days and goals. If an email is not sent (i.e. the client's email address has not been provided), the specialist can later complete this information.

Personal information and journal markings are required for analysis. It is recommended for the specialist to check the information filled by the client before creating reports, to make sure that it is appropriately filled.

You can check and edit the client information in the *Check client information* step.



When your client has finished the personal information and the journal, the mark above the step is green. The mark is yellow if some information is missing.



From the client information, you can see which tasks are ready and which still remain unfinished or not started.

You can fill, edit and save any task for your client.

Note! If you want to re-send the link to the personal information and journal to your customer, it can be done below the tasks. There is also a possibility to send a reminder that prompts your client to fill in the unfinished information. Both of the messages include the same journal link.

✔ The link was sent 27.07.2017 15:43. [Re-send](#) [Send reminder](#)

Note! The client information user interface is similar to you and to your client.

3.3.1. Pre-questionnaire

The pre-questionnaire is sent to the client in the same email as the other personal information.

	Completely agree	Partially agree	Cannot say	Partially disagree	Completely disagree
I think I am physically active enough to get health benefits.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I think my physical activity is intensive enough to improve my fitness.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In my opinion, my eating habits are healthy.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel that my alcohol consumption is not excessive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I don't generally feel stressed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
My days include breaks that allow me to recover.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I usually feel rested and energetic.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel that I sleep enough.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel that I can influence the things that affect my health.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In my opinion, I feel well at the moment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Personalized Recovery Strategies to Be More Energetic

If the pre-questionnaire is filled completely, it will be saved as ready.

Pre-questionnaire
✔ OK

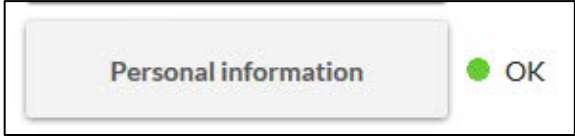
If there are some unanswered questions the pre-questionnaire task is in state *Answers missing*.



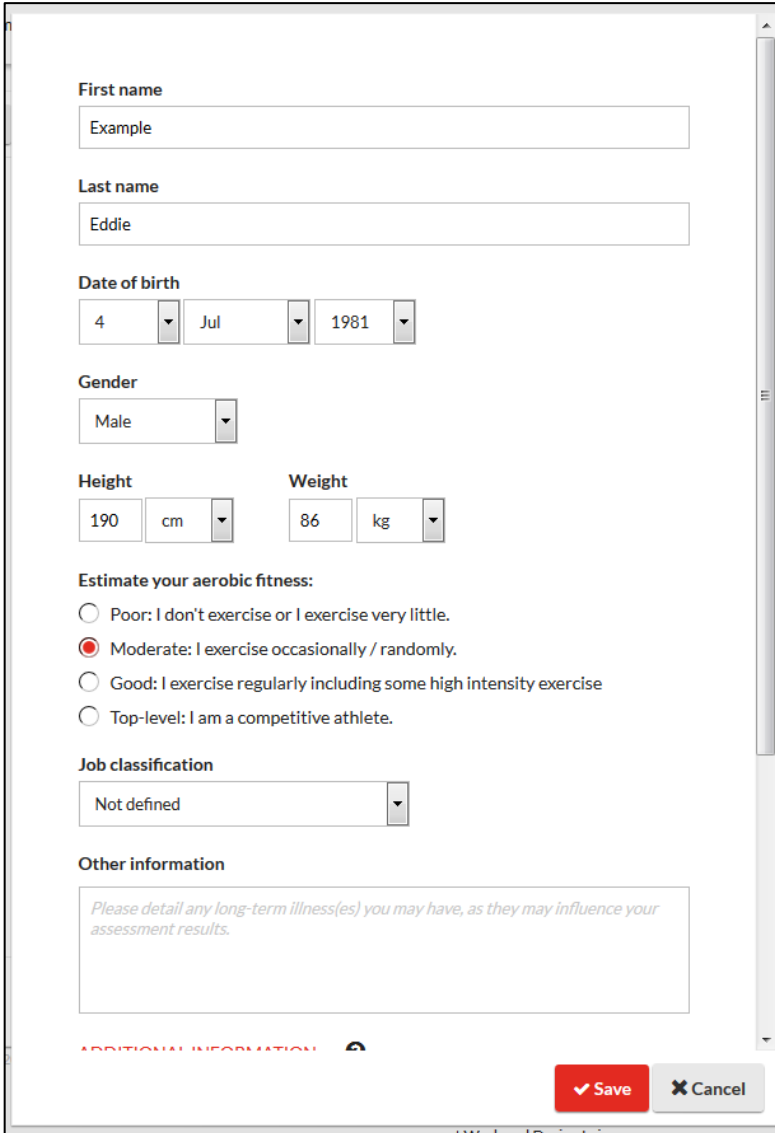
A rectangular button labeled "Pre-questionnaire" with a yellow circle icon and the text "Answers missing." to its right.

3.3.2. Personal information

Personal information task is ready if the client has filled all the required fields.




A rectangular button labeled "Personal information" with a green circle icon and the text "OK" to its right.





A screenshot of a web form titled "Personal information". The form contains the following fields and options:


- First name:** Text input field containing "Example".
- Last name:** Text input field containing "Eddie".
- Date of birth:** Three dropdown menus for day (4), month (Jul), and year (1981).
- Gender:** Dropdown menu containing "Male".
- Height:** Text input (190) and dropdown (cm).
- Weight:** Text input (86) and dropdown (kg).
- Estimate your aerobic fitness:** Four radio button options:
 - Poor: I don't exercise or I exercise very little.
 - Moderate: I exercise occasionally / randomly.
 - Good: I exercise regularly including some high intensity exercise
 - Top-level: I am a competitive athlete.
- Job classification:** Dropdown menu containing "Not defined".
- Other information:** Text area with placeholder text: "Please detail any long-term illness(es) you may have, as they may influence your assessment results."
- ADDITIONAL INFORMATION:** Section header with a plus icon.
- Buttons:** "Save" (red) and "Cancel" (grey).

Required information is date of birth, gender, height, weight and estimate of aerobic fitness. The Additional information fields are not visible for your client. You can edit these fields if you have more detailed information about your client's heart rate and fitness levels. Without manual editing the software automatically fills in these information based on the measurements done.


ADDITIONAL INFORMATION 

Min. heart rate
 beats/minute 

Max. heart rate
 beats/minute 

VO2 max ml/kg/min **MET max** METs 

If some of the needed information is missing the software notifies about it in the state of Personal information task.

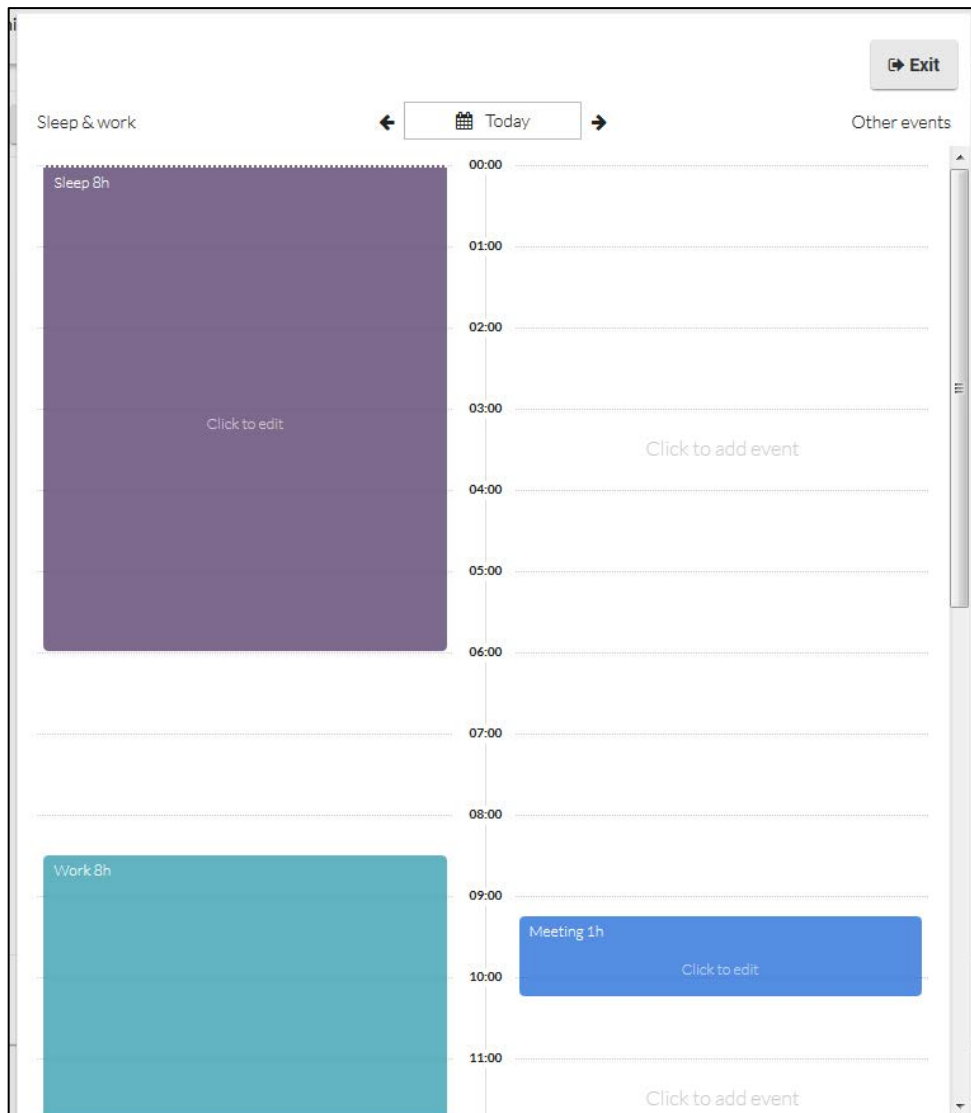
Personal information  Weight is not marked.

3.3.3. Journal

Journal task is ready if the client has filled and saved it as ready.



You can edit the journal by adding, deleting and editing the events.



To add an event, click the desired spot of the journal.

Select the type of the marker and set the start and end times. By selecting *Write own event*, you can write a marker of your own. Markers *Alcohol* and *Medication* do not need a start or end time.

Choose an event, or write your own.

Write own event...

Sleep

Work

Computer

Driving/travel

Eating

Exercise

Meeting

Nap

Reading

Relaxation

Shower/bath

TV

Alcohol

Medication

Cancel

Write own event...

Description

Starts *Today* :

Ends *Today* :

Save Cancel

When you want to add Sleep marker you need to add quality of sleep as well as starting and ending times.

Choose an event, or write your own.

Write own event...

Sleep

Work

Sleep

Starts *Thu 27 Jul* :

Ends *Today* :

How did you sleep?

Select

Well

Fairly well

Not well but not badly

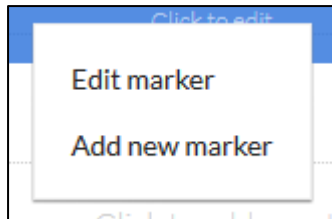
Fairly badly

Badly

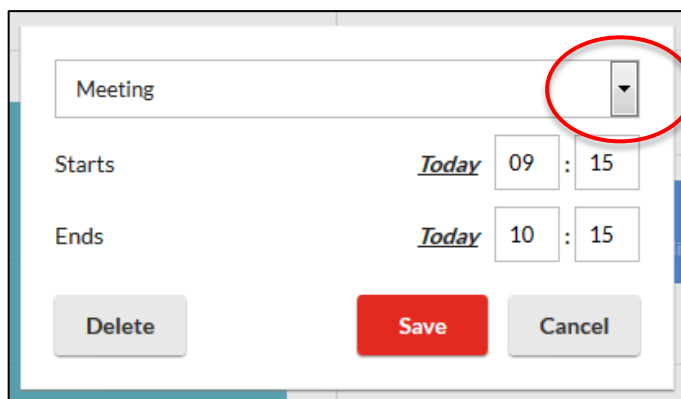
Save

Save your event by clicking *Save*.

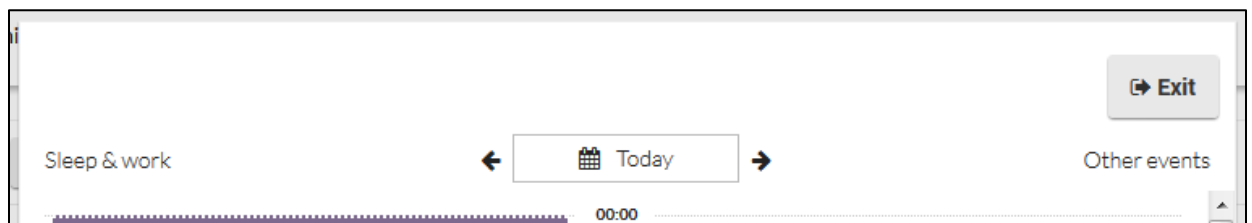
The event can be edited or deleted by clicking an event in question and selecting *Edit marker*.



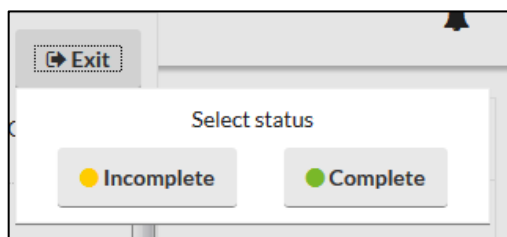
In the opening window, you can either change the marker type (marked with red), edit the starting and ending times or delete the event (select *Delete*).



You can scroll the days from the calendar or by clicking the arrow buttons.



With *Exit* button you can shut and save the journal. If the journal is not yet ready, select *Incomplete*. If you have finished the journal, select *Complete*. When you select you are ready, the journal will be saved on state *OK*.



Note!

A successful Lifestyle Assessment requires that at least sleep times are recorded in the journal for all the measured days!

3.3.4. Goals

The goal questionnaire allows the client to set some goals to improve his/her well-being.

Please set 1-3 personal goals for improving your well-being. You can write your personal goals, or choose from the list below.

Own goals

Write goal...

Write goal...

Write goal...

Stress management

I will set a realistic work schedule.

I will take regular short breaks during the work day.

After the workday, I will try to disengage from work by doing things that I enjoy.

I will learn to say "No".

Recovery and sleep

I will continue to engage in my hobbies because positive experiences enhance my well-being.

I will try to relax on a regular basis (e.g. relaxation techniques, music, TV, reading).

I will avoid stressful things just before bedtime (e.g. alcohol, work and electronic devices).

I will attempt to go to bed early enough to get enough sleep.

Physical activity

I will find an enjoyable form of exercise to engage in regularly.

I will increase the amount of light physical activity, e.g. by using the stairs, walking short distances and avoiding uninterrupted sitting.

I will attempt to engage in physical activity at least times per week.

I will take care of my muscles by including stretching as part of my weekly exercise routine.

Nutrition

I will maintain a regular meal rhythm.

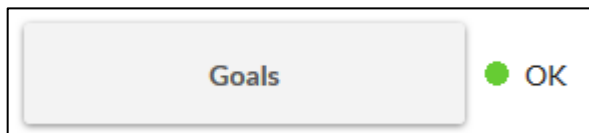
I will pay attention to the quality of what I eat, e.g. avoid products that contain excessive fats, sugar or salt.

Save **Cancel**

The goals can be chosen from the list.
Own goals can be set to the *Own goals* fields.

When the goals have been set, press *Save*.

If even one goal is set, the *Goals* tab is saved as complete.



If there are no goals set, the state is not ready.



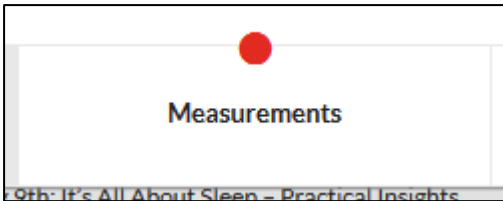
The selected goals will be printed to the *Goals* page of the assessment report package.

3.4. Upload and edit measurements

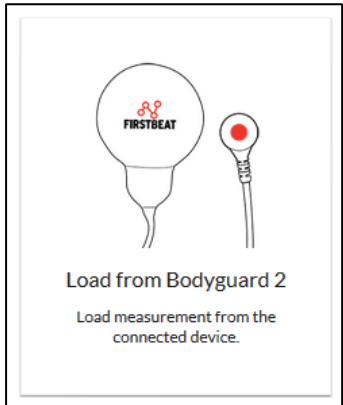
After the client has returned the device, the measurements in the device can be uploaded to the Firstbeat Lifestyle Assessment. Uploading occurs either directly to the server (Bodyguard 2) or with the Firstbeat Uploader software.

3.4.1. Firstbeat Bodyguard 2

1. Find your client’s assessment (see chapter 1 Home page functions) and select *Measurements* step.



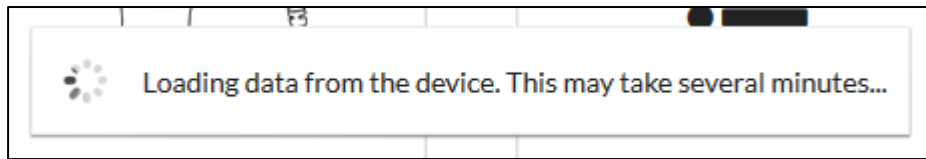
2. Plug in the Bodyguard 2 to the computer’s USB port and select *Load from Bodyguard 2*.



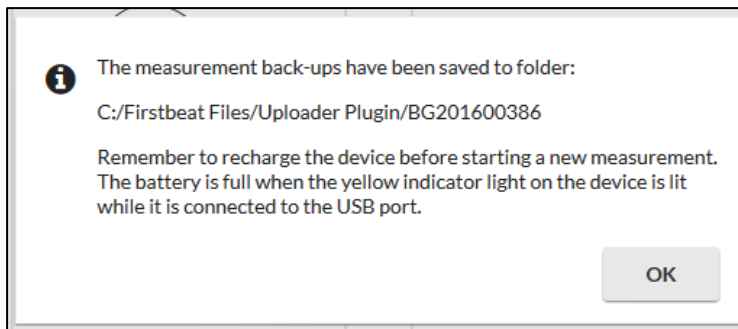
If you want to add data to the assessment from some previously uploaded measurement, select *Select measurement*.



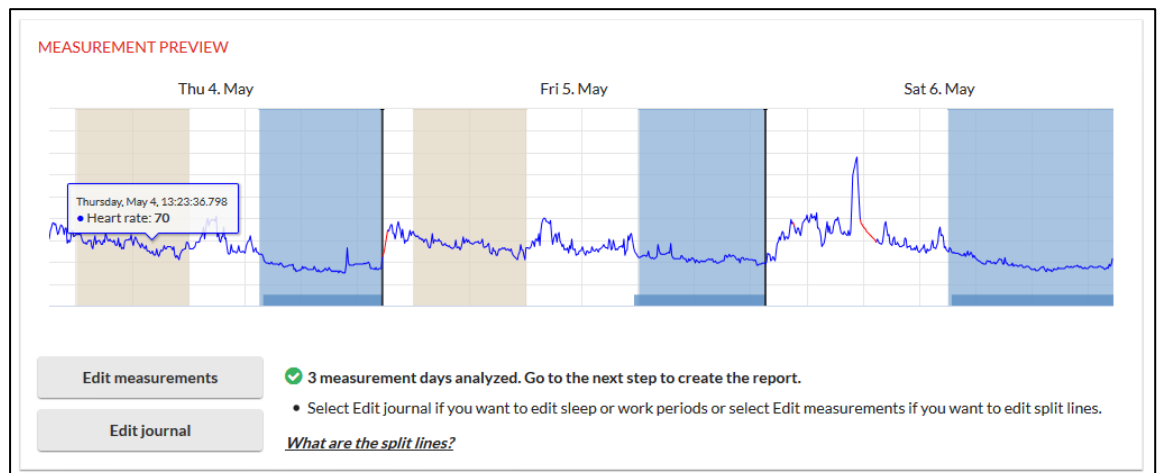
- The program now uploads the measurement to the server. Loading of the measurements may take several minutes depending on the speed of your computer and the internet connection.



- When the upload is done, you will get an info view that tells you where the measurement back-ups have been saved. Press *OK*. The upload is complete.

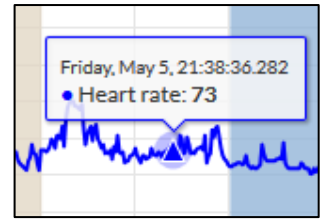


- The next view that opens up automatically shows the measurement that you just uploaded.



In addition to the heart rate graph, you can see the work and sleep periods that were marked in the journal. The measurement has been initially divided so that the split points are placed at awakening times. Possible “artefact tails” have been removed from the start and end of the measurement. Thus, a typical 3-day measurement has been divided into 3 app. 24-hour segments.

You can view the measurement information at any point by moving mouse pointer to the desired location.

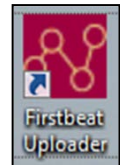


6. If the measurement is successfully divided and you do not want to do any changes to it, you can move to the next step (Reports).

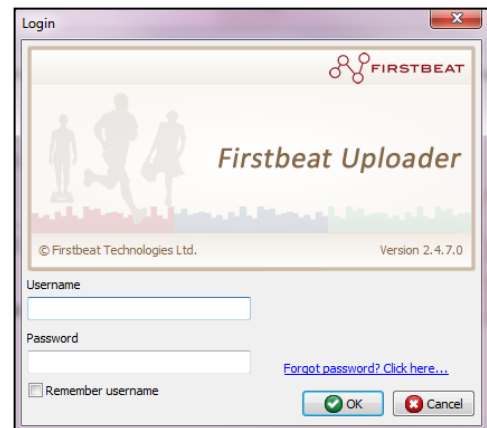
3.4.2. Firstbeat Bodyguard

If you are using an older Bodyguard device, data upload is done via the Firstbeat Uploader software. You can also follow these steps with Bodyguard 2.

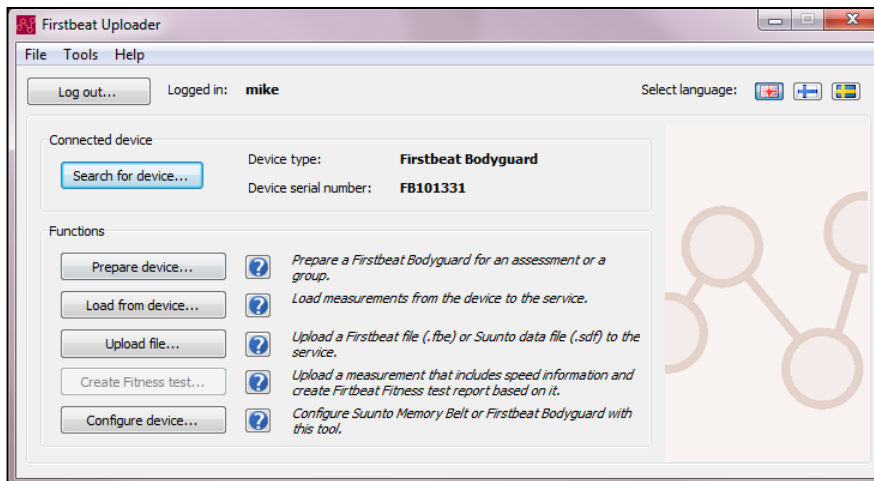
1. Upload measurements with Firstbeat Uploader. Open the Uploader from the icon on your desktop.



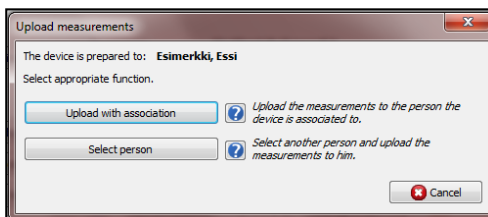
2. The Uploader will open a sign-in window. Sign in with the same username and password that you used to sign in to the Firstbeat Lifestyle Assessment.



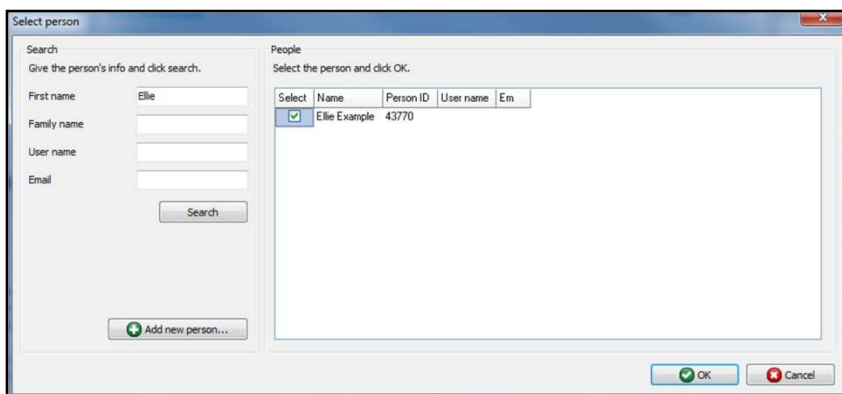
3. After plugging the device to the cable, select *Search device* and then *Search Firstbeat device*. When the Bodyguard has been found, click *Upload measurements*.



4. The program will ask you if you want to upload the data to the person for whom the device has been prepared. If this is the right person, click *Upload with association*. After this, continue from step 6.
If you want to upload the data to another person, press *Select person* and follow the directions in step 5.



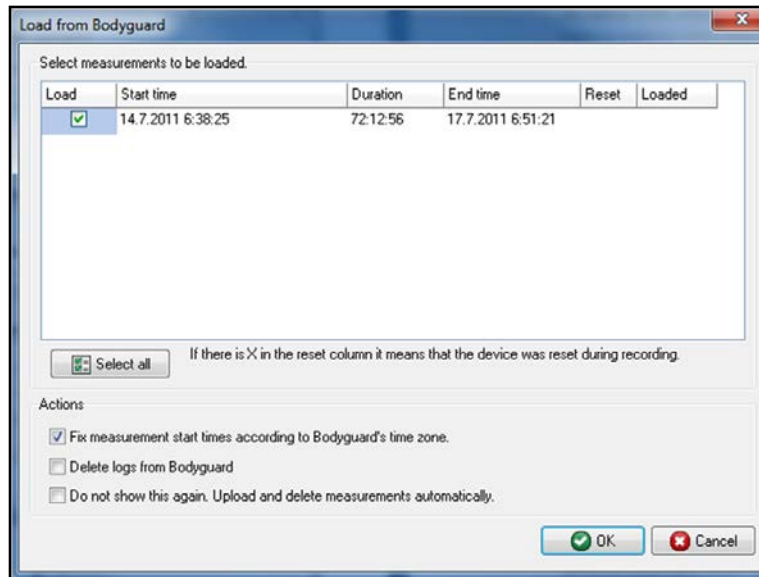
5. If the device has not been prepared ahead of time to a specific assessment, select the profile for which to upload the measurement and press *OK*. You can define the search by providing information on the left and clicking *Search*.



*Note! If you skipped the profile creation in chapter 5.1, create a new profile now by selecting **Add new person...** and follow the instructions.*

6. Select the measurements to be uploaded. If the starting time is wrong for some reason,

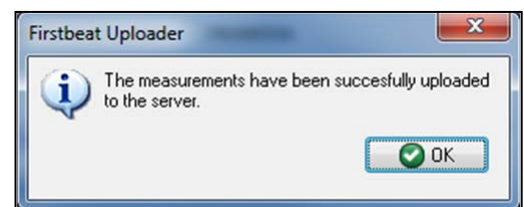
you can fix it here by double clicking the starting time and typing in the correct date and time. In the end, press *OK*.



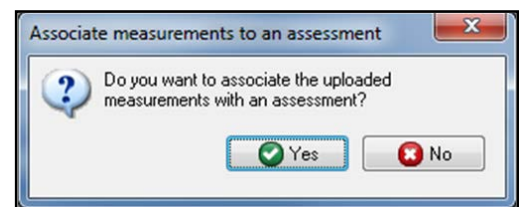
Note! There might be more than one measurement in the device, if the recording has been interrupted for a while during the measurement period. The selected measurements are later combined into one segment.

Note! If for some reason the measurement is later not found on the server or is accidentally deleted from there, copies of all uploaded measurements are saved on the computer's hard drive: (C:\Firstbeat Files\Firstbeat Uploader\\Loaded RR files).

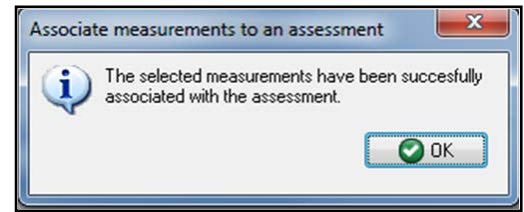
7. The Uploader will inform you when the measurements have been uploaded to the server. Click *OK* to confirm this.



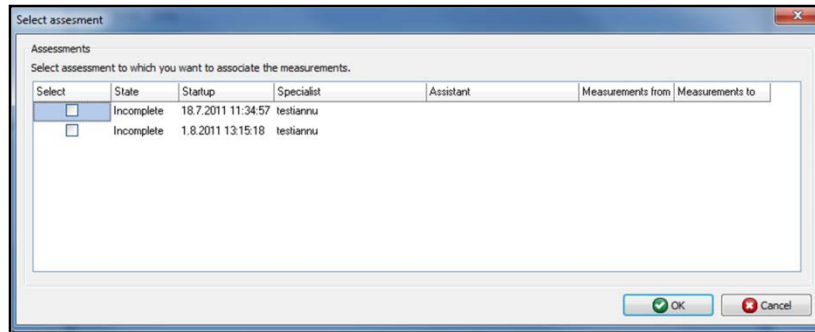
8. Next the Uploader will ask you if you wish to associate the measurement with an assessment. This step adds the measurement to an assessment that has not been started or is incomplete. If you choose *No*, the program will upload it to the person's profile, but will not associate it with a specific assessment. In this case, you can make the association later under *Edit measurements* by clicking *Add*.



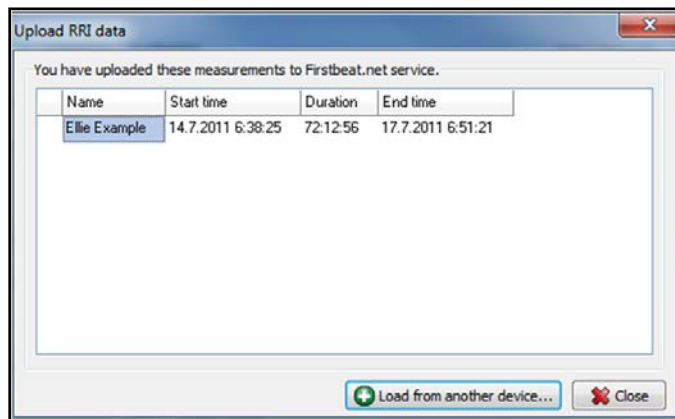
If you choose *Yes*, and the person only has one assessment, the program will automatically add the measurement to this assessment. In the end, press *OK*.



If the person has several incomplete assessments, you will get a pop-up window where you can choose the desired assessment. In the end, press *OK*.



- Once the measurement has been uploaded to the server and associated with an assessment, you will get a pop-up window that shows which measurements have been uploaded to the server, and for which persons. If you wish to upload measurements from another device, choose *Load from another device*. Otherwise, close the window by choosing *Close*.

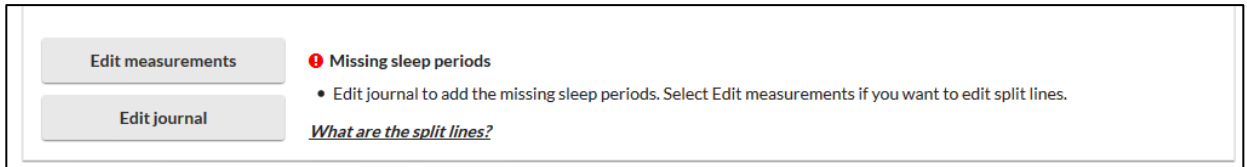


- You can view the measurement that you just uploaded by clicking the *Measurements* step.

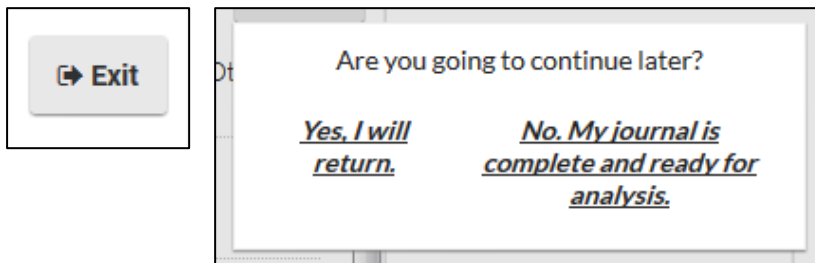
3.4.3. Edit measurements

In some cases, the measurement may need editing before reports can be created.

- If preparing of the measurement does not succeed, for instance the sleep time is divided into several periods or there are sleep times missing, the software recommends you to fix the sleep times in the journal.

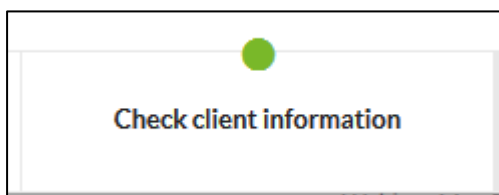


Open the journal, fix the sleep times and select *Exit > No. My journal is complete and ready for analysis.*

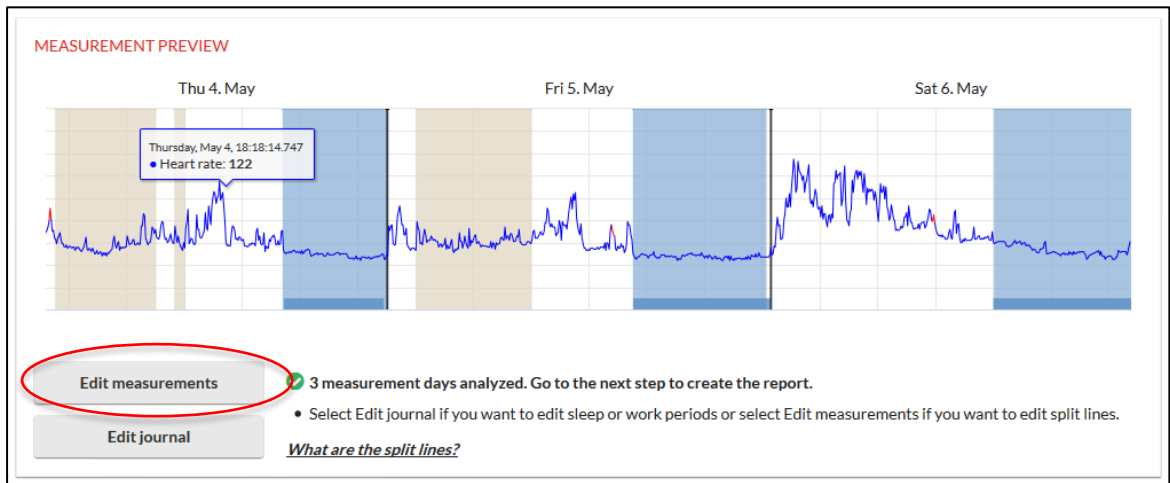


The journal will be saved and the *Measurement preview* returns.

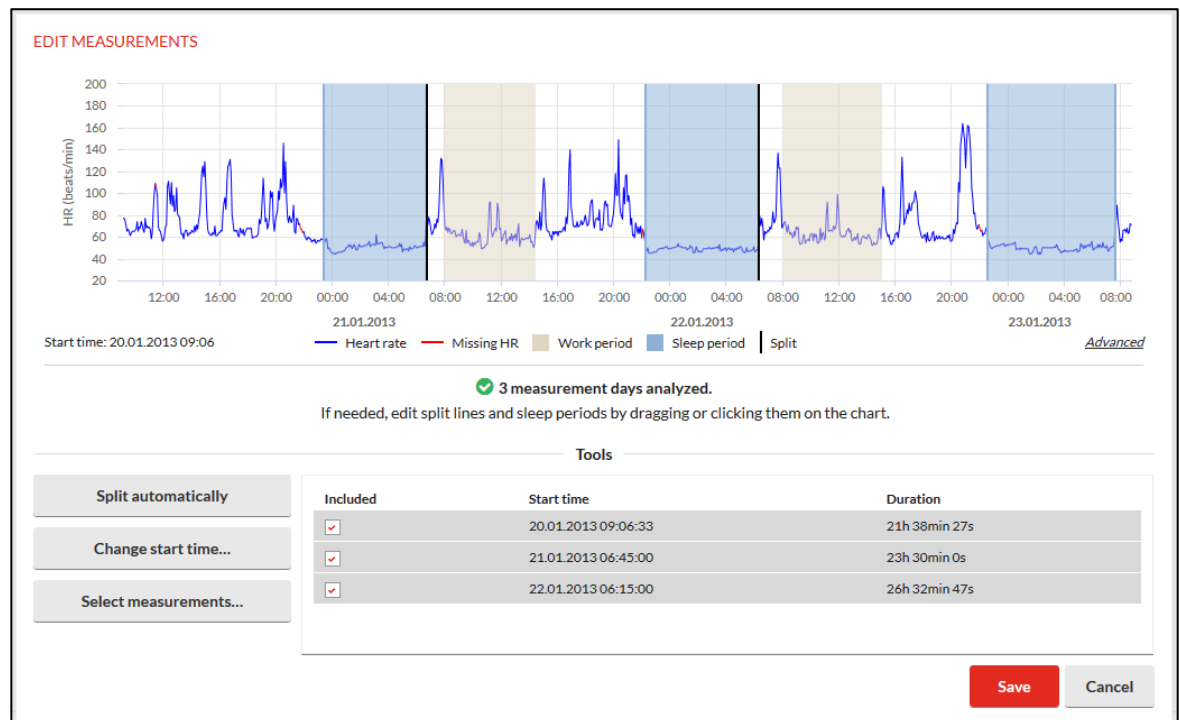
You can also re-send the link to the journal to your client by selecting *Start assessment* step and clicking *Re-send*.



- If you want to change the measurement's start time, points of split lines or the measurements used in the assessment, select *Edit measurements*.

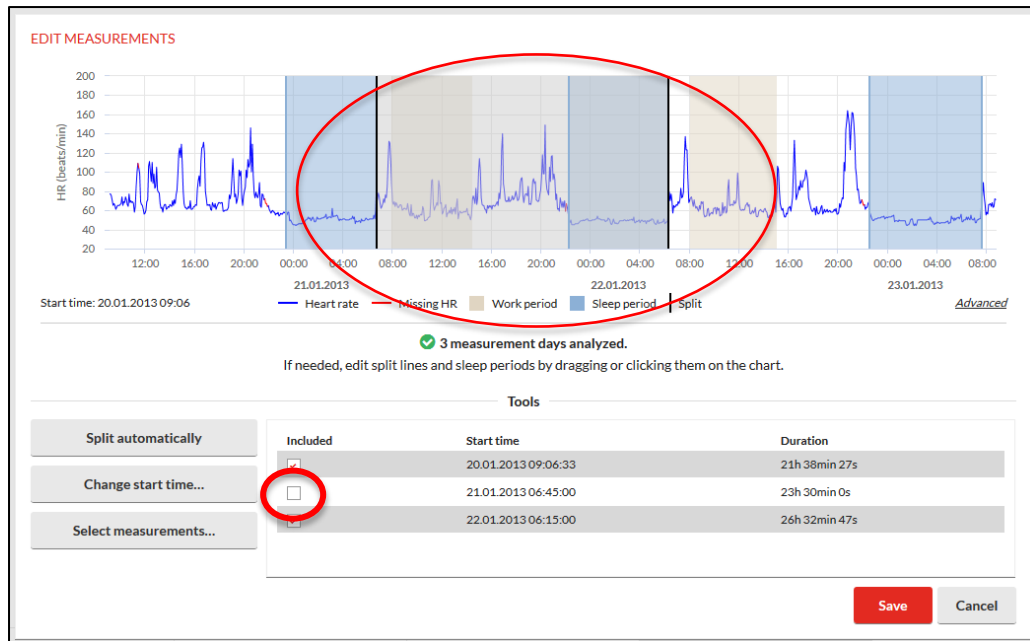


Edit measurements view opens.

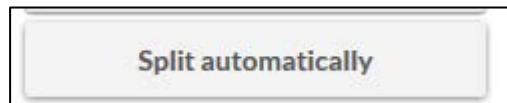


Measurements included to the assessment can be seen listed in the table on the right. When there is a selection in the *Included* column the measurement period in the same row will be included to the report.

If you want that some of the measurement periods is left out from the report, remove the selection. Now the measurement period in question will be shown with the grey background.



- **Split automatically** tab sets the split lines automatically to the ends of sleep periods or approximately in every 24 hours.



- **Editing split lines:** If needed you can fix the points of split lines by dragging or clicking.

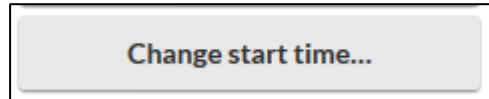
You can add new split lines by clicking the measurement chart and setting the time of split line to the opening window. To edit or delete existing split lines click the desired line and choose the actions. Existing split line can be moved by dragging it to another place in heart rate graph.

Edit split

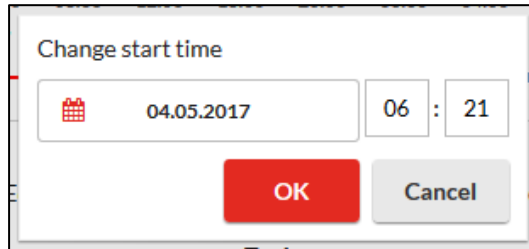
06.05.2017 08 : 33

Buttons: Delete, OK, Cancel

- **Change start time** tab allows you to make changes to the start time of the measurement if needed.



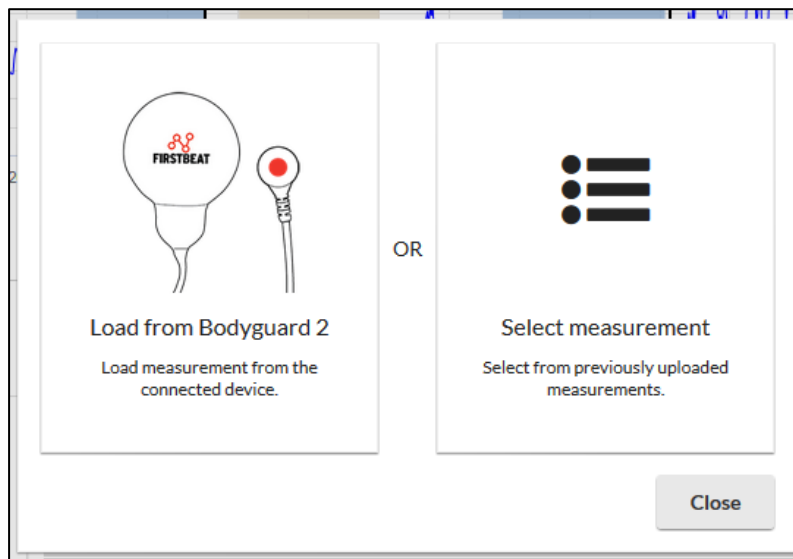
Set the start time in the opening window and click *OK*.



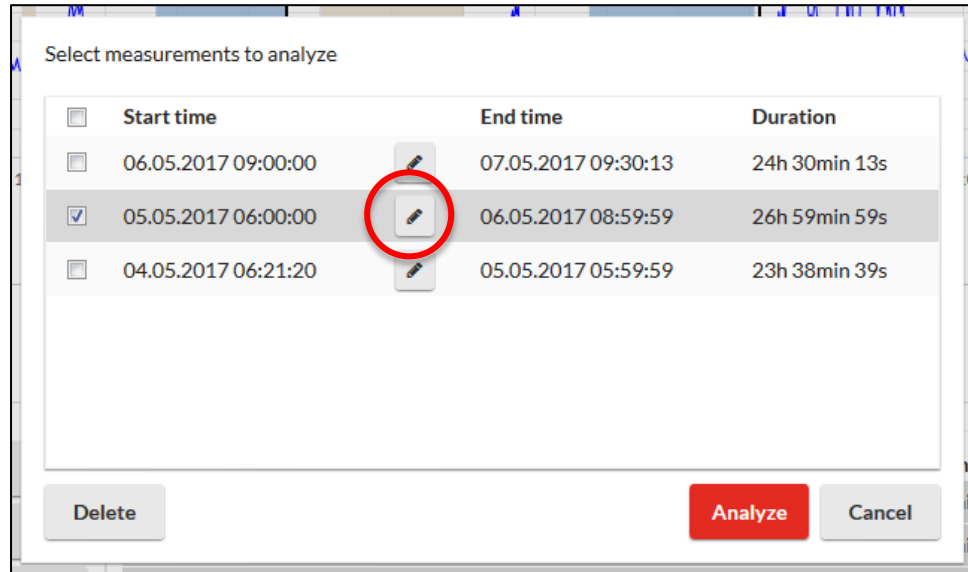
- With **Select measurements feature** you can remove, add or change the measurements used in the assessment.



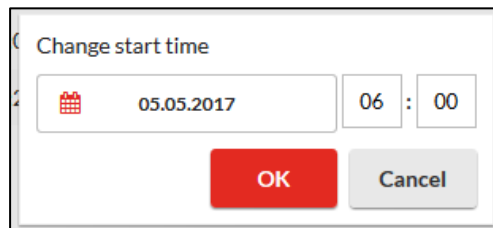
Choose if you want to load new measurements from Bodyguard 2 device or select from previously uploaded measurements.



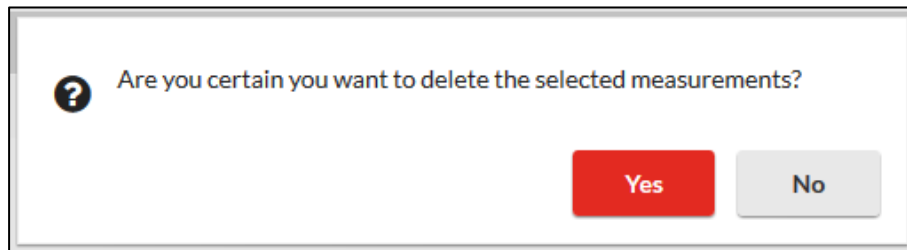
If you choose *Select measurement*, a window with a list of all measurements loaded to the profile in question opens.



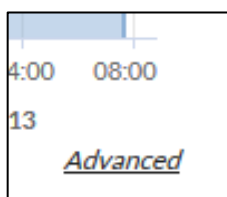
Select the measurements you want to analyze and click *Analyze*. If needed you can change the start time of some measurement by clicking the edit button in the same row (marked with red).



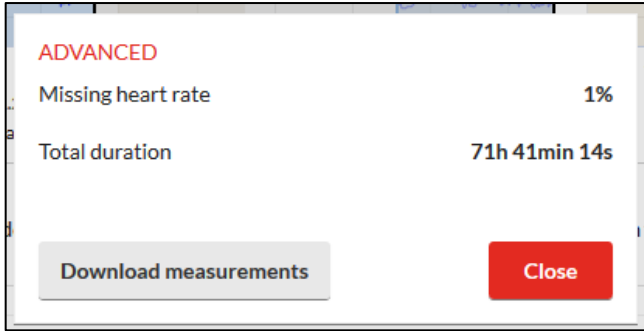
If you want to delete measurements, select the desired measurement/measurements and click *Delete*. The software will confirm are you certain you want to delete the measurement/measurements in question.



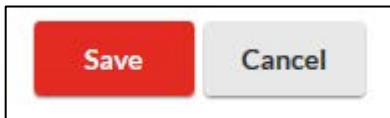
Note! When you delete the measurement, it will be deleted from the server completely. If you want to restore the measurement you need to upload it again.



Under the heart rate graph, you can find *Advanced* button. Via that function you can check the measurement length and error percentage. If needed, there is also an option to download measurements as .fbe file.



If you have done any edits to the measurement, click *Save* from the low right corner.

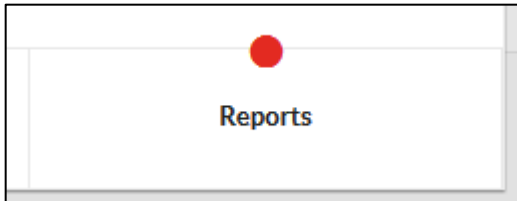


You will now return to the *Measurement preview*.

3.5. Creating reports

When the information filled by the client has been checked and the measurement has been uploaded and edited, you can create reports.

Move to the *Reports* step.



In this view you can set the report settings and create reports and follow-up report.



From *Report settings* tab you can select the report language, reports you want to create and the measurement units. If you don't want the person's name to show up on any of the reports, select *Print person identifier instead of name*. Select also whether to include a front page, pre-questionnaire and goals page in the report package.

REPORT SETTINGS

Language

Reports

Measurement units SI units Imperial units

Print person ID instead of name

Include front page

Include pre-questionnaire page

Include goals page

To select the reports, you want to create click *Select* tab.

REPORTS TO CREATE

Lifestyle assessment reports

Lifestyle assessment report

Lifestyle assessment summary

Additional reports

Training Effect report

Physical Workload report

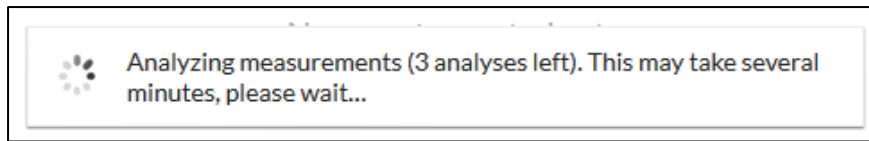
Specialist report

Select the reports and click OK.

When you have done all the settings, click *Save*.

When you are ready to do the reports, click *Create reports*.

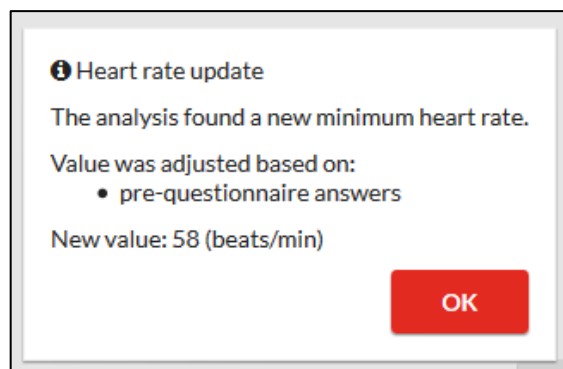
Now software begins to create the reports.



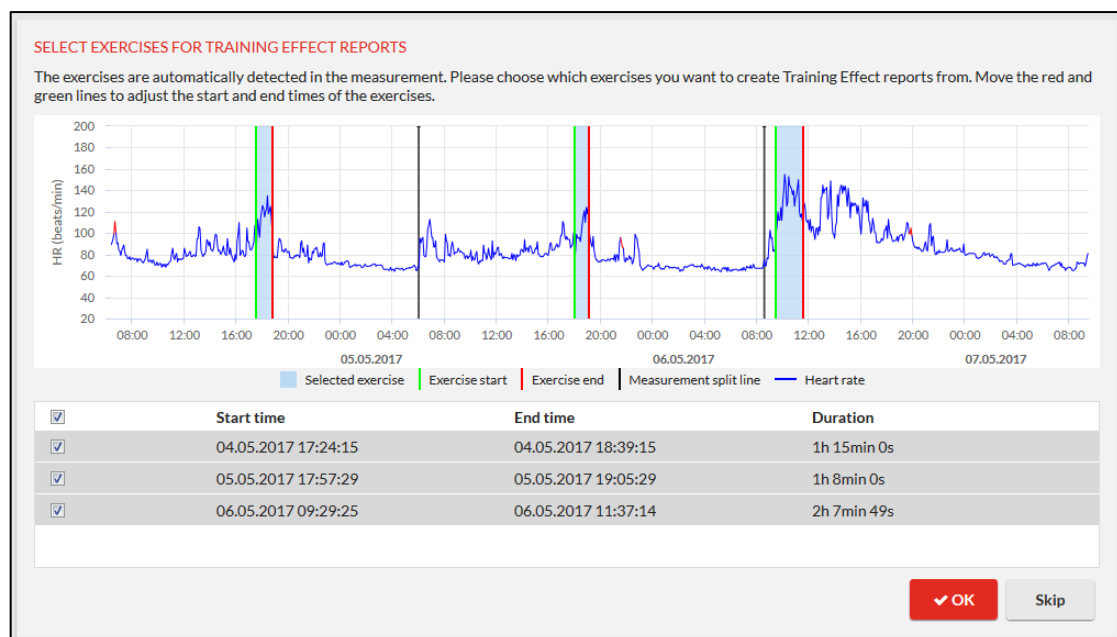
Creating the reports takes a few moments. Typically, the program will inform you that some new heart rate values were found in the measurement.

The program also does an automatic reduction of resting heart rate if the person has consumed alcohol on all measurement days, slept poorly or recorded feeling stressed and not well in the pre-questionnaire.

Click *OK* to confirm the update.





If you are going to create a Training Effect report, select the training periods you want to analyze. If there are no training periods in the measurement, the Training Effect report will not be created.

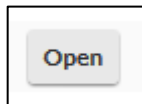


You can also edit the start and end times of exercises by dragging the split lines or the whole exercise period. After selecting the exercises, click *OK*.
If you do not want to create Training Effect report, select *Skip*.

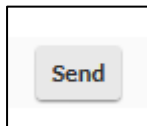
All the created reports can be found from the *Reports* table. New reports can still be created in the *Create reports* button.

REPORTS						
Report	Created	Sent	Language			
 Lifestyle Assessment reports	18.05.2018 11:42	18.05.2018 11:44 example123@customer.com	English	<input type="button" value="Open"/>	<input type="button" value="Send"/>	<input type="button" value="Delete"/>
 Specialist report	18.05.2018 11:42	-	English	<input type="button" value="Open"/>	<input type="button" value="Send"/>	<input type="button" value="Delete"/>

You can open the reports by clicking *Open*.



If you want to send reports by email, select *Send*.

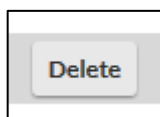


Type an email address and select the language of the message in the opening window. In the end click *Send*.

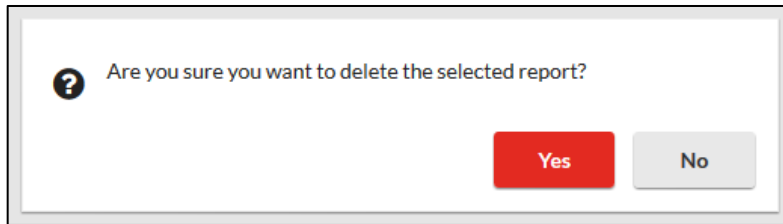
E-mail address

Message language

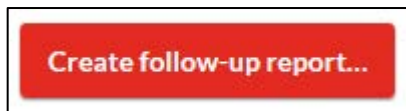
The reports can be deleted by selecting *Delete*.



Software still makes sure whether you really want to delete the report.



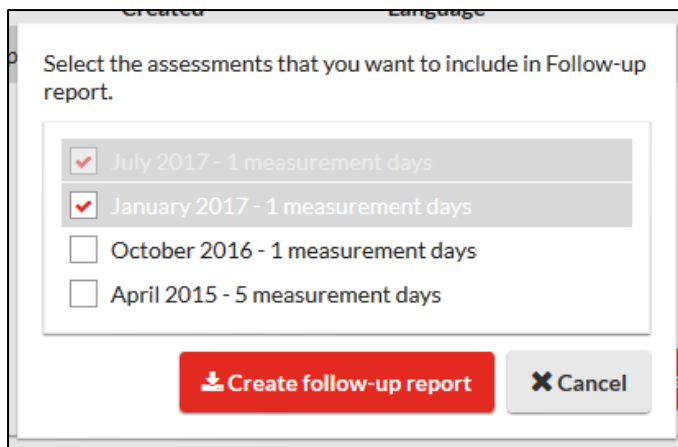
Follow-up report can be created by selecting *Create follow-up report*.



Select the lifestyle assessments you want to include in the follow-up report.

These assessments will be compared with each other.



After selecting the desired assessment/assessments, click *Create follow-up report*.




3.6. Customer survey

After the Lifestyle Assessment, a customer survey will be automatically sent to the client. The survey will allow clients to evaluate the measurement process. With the results of the customer survey, Lifestyle Assessment service providers can measure and improve the quality of their service. The results are shown anonymously and they can be viewed via Customer survey function on the main page (*Tools > Customer survey*).

By default, the feedback survey will be sent to the client two weeks after the assessment report has been created. If needed, you can disable the sending of feedback surveys or change the sending schedule by choosing *Edit*.

REPORTS						
Report	Created	Sent	Language			
 Lifestyle Assessment reports	18.05.2018 11:42	18.05.2018 11:44 example123@customer.com	English	<input type="button" value="Open"/>	<input type="button" value="Send"/>	<input type="button" value="Delete"/>
 Specialist report	18.05.2018 11:42	-	English	<input type="button" value="Open"/>	<input type="button" value="Send"/>	<input type="button" value="Delete"/>

 Customer survey will be sent on 01.06.2018. [Edit...](#)


If you want to send the customer survey instantly select *Send now*.


Send customer survey automatically on:

 29.07.2017

You can also set a new schedule to the sending of the survey by clicking the date field and selecting the desired sending day.

Send customer survey automatically on:

 29.07.2017

 Customer

« < July 2017 > »

M	T	W	T	F	S	S
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
24	25	26	27	28	29	30
31	1	2	3	4	5	6
7	8	9	10	11	12	13

If you do not want the survey to be sent at all, remove the selection from *Send customer survey automatically on*.



The screenshot shows a settings dialog box with the following elements:

- Checkbox: Send customer survey automatically on:
- Date picker: 29.07.2017
- Buttons: Send now, Save, Cancel

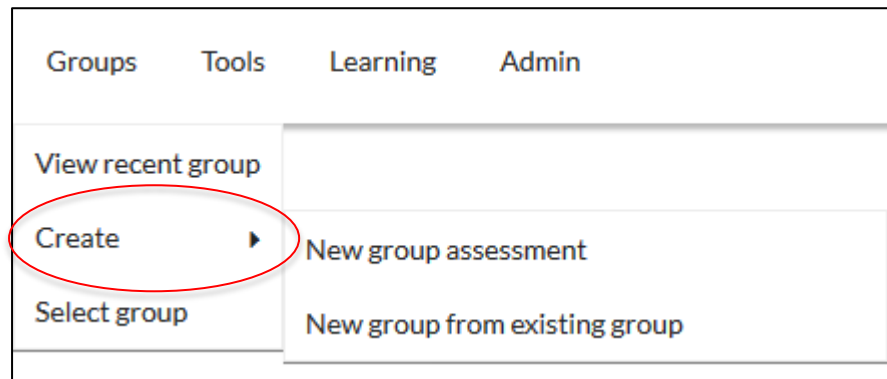
After doing the changes needed click *Save*.

Note! If you want to set off the Customer survey function completely, the setting can be done in System options (Administration → System options).

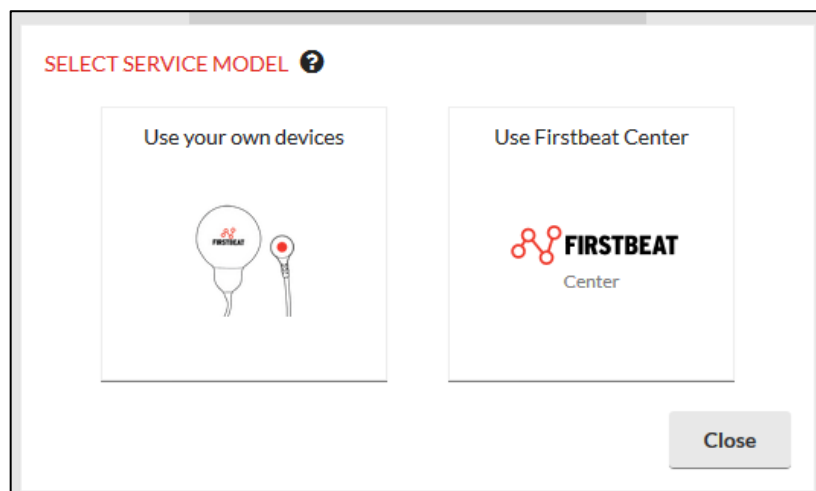
4. Groups

4.1. Creating new group

Create a new group by selecting Groups > Create and select if you are going to create a completely new group or follow-up measurement for existing group.



Select whether you are using your own devices or Firstbeat Center.



Note! Service model cannot be changed afterwards. If you do not have Firstbeat Center in use, this step is not needed. More about conducting group assessment with Firstbeat Center is described at chapter **6 Lifestyle Assessment with Firstbeat Center**.

Note! If you are going to do a follow-up for an existing group, select first the correct group.

Give a name to group and set links sending and expiring dates. You can also add professional users to groups by clicking the edit button (marked with red).


When doing a follow-up group, you can also select the participating group members at this step.


GROUP DETAILS


Group name

Link will be sent on

Link expires on

Professional users 

Use Firstbeat Center 

I use my own devices 

When you have filled all the information, click *Save*.

The group view will now open and the groups basic information are shown in the left and the group members in the right side of view. The basic information can be modified by clicking *Edit* button.

Example Group


GROUP DETAILS


Group name Example Group

Link will be sent on 01.08.2017

Link expires on 21.08.2017

Professional users Esimerkki Asiantuntija

Use Firstbeat Center No 

I use my own devices Yes 

Members (0)

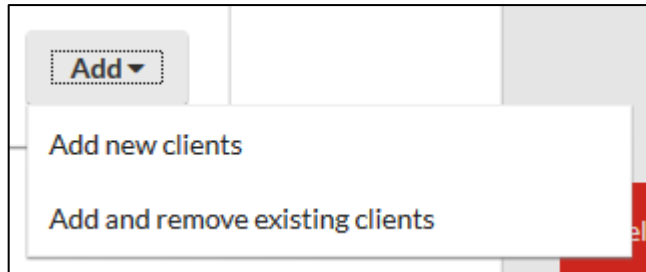
Name

Group details Devices Clients' information Measurements Individual reports Group reports Customer surveys

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You can add members to the group by selecting *Add* from the left column.

Select whether you are adding new or already existing clients.



If you are adding new clients the following view opens:

 A screenshot of a web form for adding clients. The form is divided into two main sections. On the left, there is a text input field with the placeholder text 'Write a list of client e-mail addresses below, one address per line.' The field contains the email address 'estrella.example@example.com'. Below the input field are two buttons: 'Add' and 'Remove'. On the right, there is a 'Preview' section containing a table. The table has two columns: 'Clients' and 'Language'. The first row of the table shows 'example.client@example.cc' under 'Clients' and 'English' under 'Language'. At the bottom right of the form are two buttons: 'Save' (in red) and 'Cancel'.

Clients	Language
example.client@example.cc	English

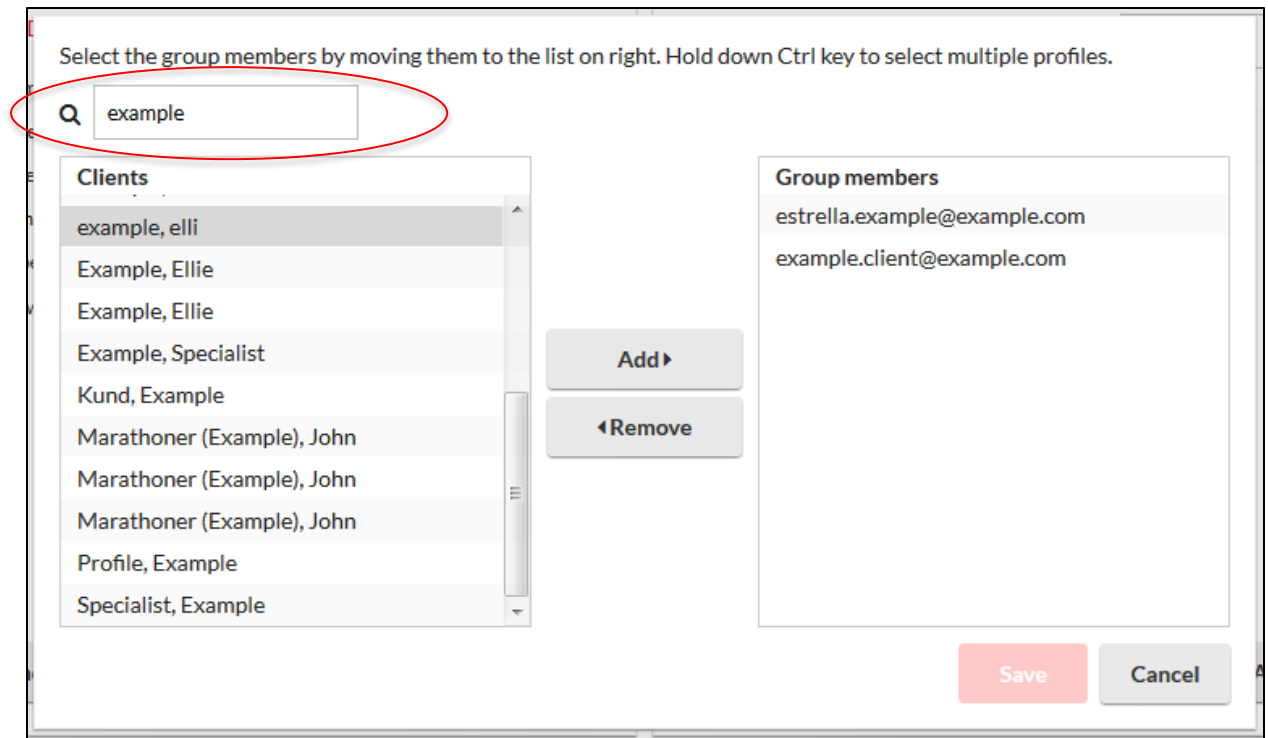
Add your clients' email addresses to the left field and click *Add*.

Added clients can be seen in the *Preview* field. In this field you can also add the language of your clients.

If you want to remove the added client from the group, select the name from the *Preview* field and click *Remove*.

When you have added all the profiles and set the languages, click *Save*.

If you are going to add already existing clients the following view opens:



Select the clients from the list on the left side and click *Add*. You can also use the *Search* field to search for the clients.

The added clients can be seen in the list on right side. If you want to remove some client from the group, select the name and click *Remove*.

When you are ready, click *Save*.

In the group view you will now see the added members next to the group information. If needed the members can be removed from the group by clicking the red cross next to the name.

In the top left corner of the view you can see the name of the group (marked with blue). Next to the name there are also options to refresh the view or delete the group. The view can be closed by clicking the *Close* in the top right corner. You can move across the steps of the group measurement from the low border of the view.

When a certain step is ready, the circle above the step name changes green. Circle above the not started steps is red and incomplete steps have yellow circle.

4.2. Preparing devices to the group

Before the devices can be given to the clients, they need to be prepared for the measurements.

Preparation

- set the device clock to the correct time
- ensures that the device is free
- empties the device memory
- ensures that the device battery is charged full
- reserves the device to this lifestyle assessment

Note! The checking steps differ depending on whether you are using Bodyguard or Bodyguard 2. If you use the older Bodyguard device, check the instructions from the page 18.

In order to prepare devices to the group move to the step *Devices*.

The screenshot displays the 'Devices' management interface. At the top, there are 'Refresh' and 'Delete' buttons. The main content area is titled 'DEVICES' and includes instructions: 'Connect the devices to be prepared and press "Search devices" button.' A search input field is present. Below this is a table with the following structure:

Client	Selected / Prepared device	Battery	Prepare / Cancel
estrella.example@example.com			
Example, Ellie			
example.client@example.com			

At the bottom of the table area, a 'Search devices' button is circled in red. To its right, the text 'Devices not searched' is visible. Further right are 'Export list...' and 'Prepare selected' buttons. The bottom navigation bar contains several tabs: 'Group details', 'Devices' (highlighted), 'Clients' information', 'Measurements', 'Individual reports', 'Group reports', and 'Customer surveys'.

You will now see all the group members listed. Plug in one or more devices to your computer's USB port/ports and select *Search devices*.

Found devices will now be listed and automatically paired with the free clients. You can also change the device selected to the client by clicking the arrow next to the serial number.

DEVICES

Select the devices to be prepared for each client. Prepare devices one by one or prepare multiple devices at once with "Prepare selected" button.

Search...

Client	Selected / Prepared device	Battery	Prepare / Cancel
estrella.example@example.com	BG201600386	70 %	Prepare
Example, Ellie	BG35140265	100 %	Prepare
example.client@example.com	Not selected		

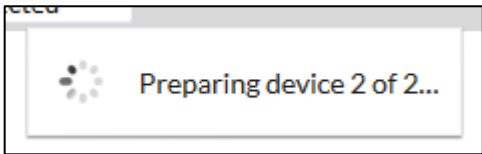
Search devices 2 devices detected

Export list... Prepare selected

In the list you can also see the state of the device batteries. If the battery charge is not 100% it is recommended to charge it full before giving device to the client.

When you have selected to who you want to prepare the plugged devices you can prepare them either one by one by clicking *Prepare* in the client's row, or all at the same time by clicking *Prepare selected*.

Preparing the devices takes couple of minutes depending on the number of devices.



When the device preparation is ready you can unplug devices and plug in the new devices for the preparation.

If you want to cancel the preparation of some device, select *Cancel* in that row.

DEVICES

Select the devices to be prepared for each client. Prepare devices one by one or prepare multiple devices at once with "Prepare selected" button.

Search...

Client	Selected / Prepared device	Battery	Prepare / Cancel
estrella.example@example.com	BG201600386		Cancel
Example, Ellie	BG35140265		Cancel
example.client@example.com			

Search devices 2 devices detected

Export list... Prepare selected

You can also export the list of prepared devices as an excel file by selecting *Export list*.

When you have prepared devices to all group members and made sure that the device batteries are full, you can give the devices to your clients.

4.3. Clients' information (clients fill)

At the date you have set to the group assessment the clients will receive an email message from Lifestyle Assessment with a link for filling out the pre-questionnaire, personal information, journal during the measurement days and goals. If some email is not sent (i.e. some client's email address has not been provided), the specialist can later complete this information.

Personal information and journal markings are required for analysis. It is recommended for the specialist to check the information filled by the clients before creating reports, to make sure that they are appropriately filled.

You can check, and if needed edit, the clients' information by moving to *Clients' information* step.

The screenshot shows a web interface for managing client information. At the top, there are buttons for 'Refresh' and 'Delete', and a 'Close' button in the top right. The main content area is titled 'CLIENTS' INFORMATION' and contains a table with the following columns: Name, View link information, Pre-questionnaire, Personal information *, Journal *, and Goals. Each cell in the table contains a 'View' button and a colored dot indicating the status (red for missing, green for complete). A search bar is located in the top right of the table area. Below the table is a 'Send reminders...' button and a note: '*These tasks must be complete before reports can be created.' At the bottom, there is a progress bar with seven steps: Group details (green dot), Devices (yellow dot), Clients' information (yellow dot), Measurements (red dot), Individual reports (red dot), Group reports (red dot), and Customer surveys (red dot).

Name	View link information	Pre-questionnaire	Personal information *	Journal *	Goals
estrella.example@exan	View	● View	● View	● View	● View
Example, Ellie	View	● View	● View	● View	● View
example.client@examp	View	● View	● View	● View	● View

From the first column (*View link information*) you can check the state of the link and if needed resent it.

The modal dialog box contains the following text: 'The link will be sent automatically on 01.08.2017.' Below this is a label 'Client's e-mail address' and a text input field containing 'example.client@example.com'. At the bottom, there is a note: 'NOTE: The e-mail address will be updated to the client's profile.' and two buttons: 'Send now' (red) and 'Cancel' (grey).

In the other columns you can see pre-questionnaire, personal information, journal and goals. If the mark next to the questionnaire is red, your client has not started filling the information. If the mark is yellow, there are some information filled but the form is not saved as ready. Green marks indicate that the information is filled and the form is saved as ready.

More about viewing and editing the clients' information can be read under the individual assessments beginning at page 22.

4.4. Uploading and editing measurements

When devices are returned from clients, the measurements need to be uploaded to Lifestyle Assessment.

Note! The upload process is different whether you use Bodyguard 2 device or older Bodyguard. If you use old Bodyguard device, check the instructions from page 33.

To upload the measurements, move to *Measurements* step in the group view.

Example Group Refresh Delete Close

MEASUREMENTS Search...

Name	Prepared device	Status	
Example, Client	-	No measurements	Load
Example, Ellie	BG35140265	No measurements	Load
Example, Estrella	BG201600386	No measurements	Load

Re-measurement... ?

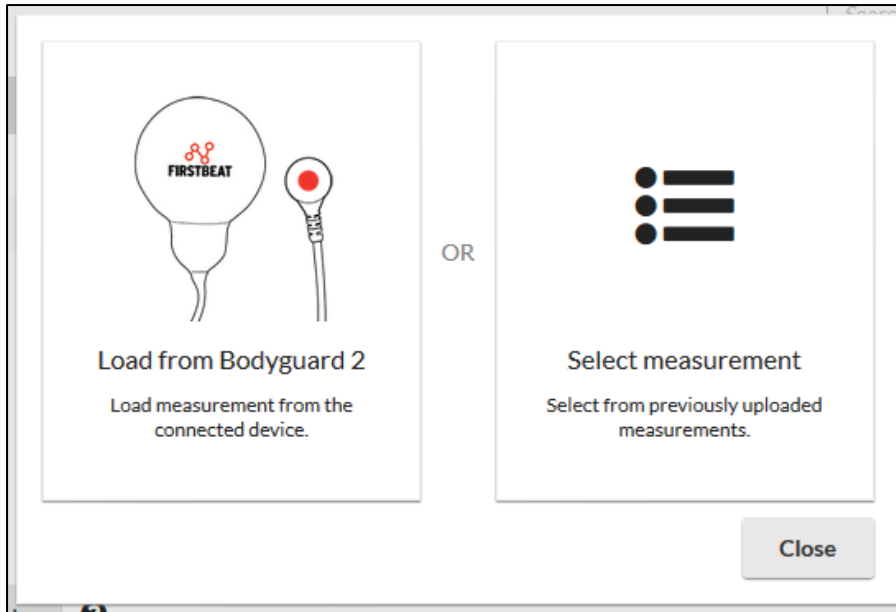
Group details Devices Clients' information Measurements Individual reports Group reports Customer surveys

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You will see all the group members with the devices prepared to them listed in the view. *Status* column shows the status of the measurements.

To upload the measurement of your client, plug the Bodyguard 2 device to USB port and select *Load* in the correct row.

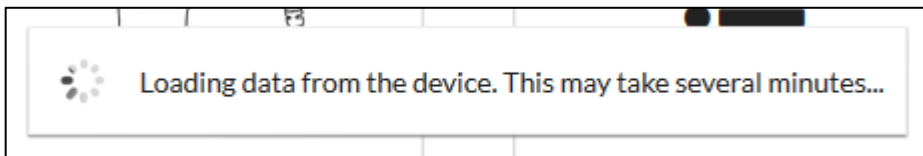
Software asks whether you want to load measurement from device or to use some previously uploaded measurement.



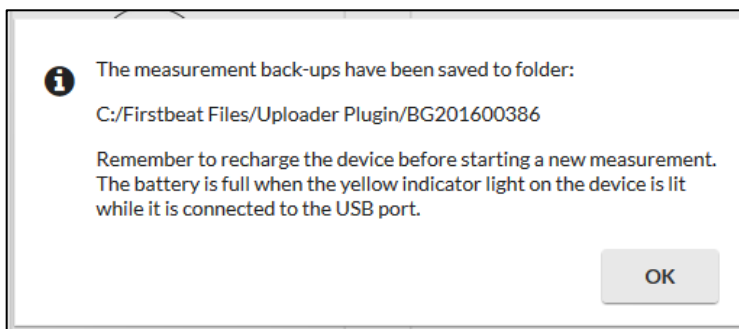
Select *Load from Bodyguard 2*.

Note! Select option Select measurement if you have already uploaded measurement to your client for example via Uploader or if you want to use some other previously uploaded measurement in this analysis.

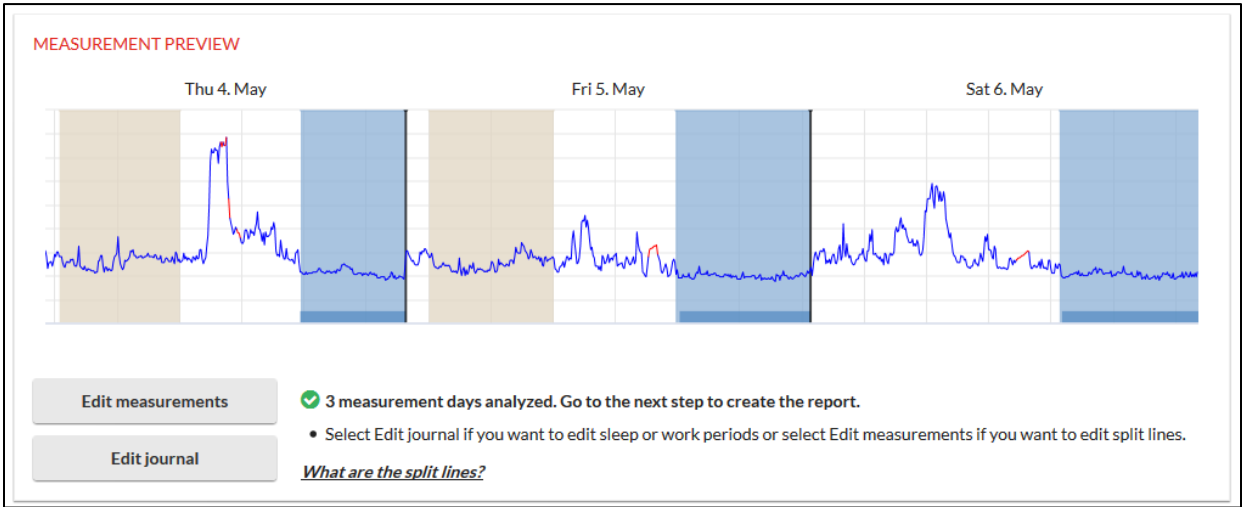
Software starts to load the measurement from the device.



When the measurements are uploaded, software notes you about the backup file. Select *OK* and software starts to analyze measurements.



When the measurements are analyzed, the Measurement preview opens. There you can check and, if needed, edit the measurement.



Read more about the editing the measurements under the Individuals starting from page 36.

When you are ready with this measurement, click Close and continue by uploading next client's measurement.

The screenshot shows the 'MEASUREMENTS' table. At the top right is a search bar labeled 'Search...'. The table has three columns: 'Name', 'Prepared device', and 'Status'. There are three rows of data. The first two rows have a status of 'No measurements' (red dot) and a 'Load' button. The third row has a status of 'Analyzed' (green dot) and an 'Open' button, which is circled in red. At the bottom left, there is a 'Re-measurement...' button with a question mark icon, circled in blue.

Name	Prepared device	Status	Action
Example, Client	-	No measurements	Load
Example, Ellie	BG35140265	No measurements	Load
Example, Estrella	BG201600386	Analyzed	Open

Besides the uploading you can also preview and edit again the already uploaded and analyzed measurements. Select *Open* to do that.

If there is a need, for example because of high error percentage, to do a re-measurement to some of your clients, it can be done by selecting the client in question and clicking *Re-measurement*.

Now you can prepare and give a new device to you client. New journal link will be sent from software automatically and it is valid three weeks. Also, the original measurements are saved so you can view them if needed. When the re-assessment is ready you can upload the measurements via these same steps and the measurement is added to your group analysis.

4.5. Creating reports to group

When the measurements are uploaded and clients have filled their personal information and journals, you can create reports.

4.5.1. Individual reports

Move to *Individual reports* step. You will now see the list of group members.

Center example Refresh Delete Close

INDIVIDUAL REPORTS Search...

Name	Status	Reports
Example, Eddie	● Reports created	Create/view...
Example, Ellie	● Reports created	Create/view...

2/2 reports created Download all

2/2 ready for reporting Create all...

●
Group details

●
Device orders

●
Clients' information

●
Measurements

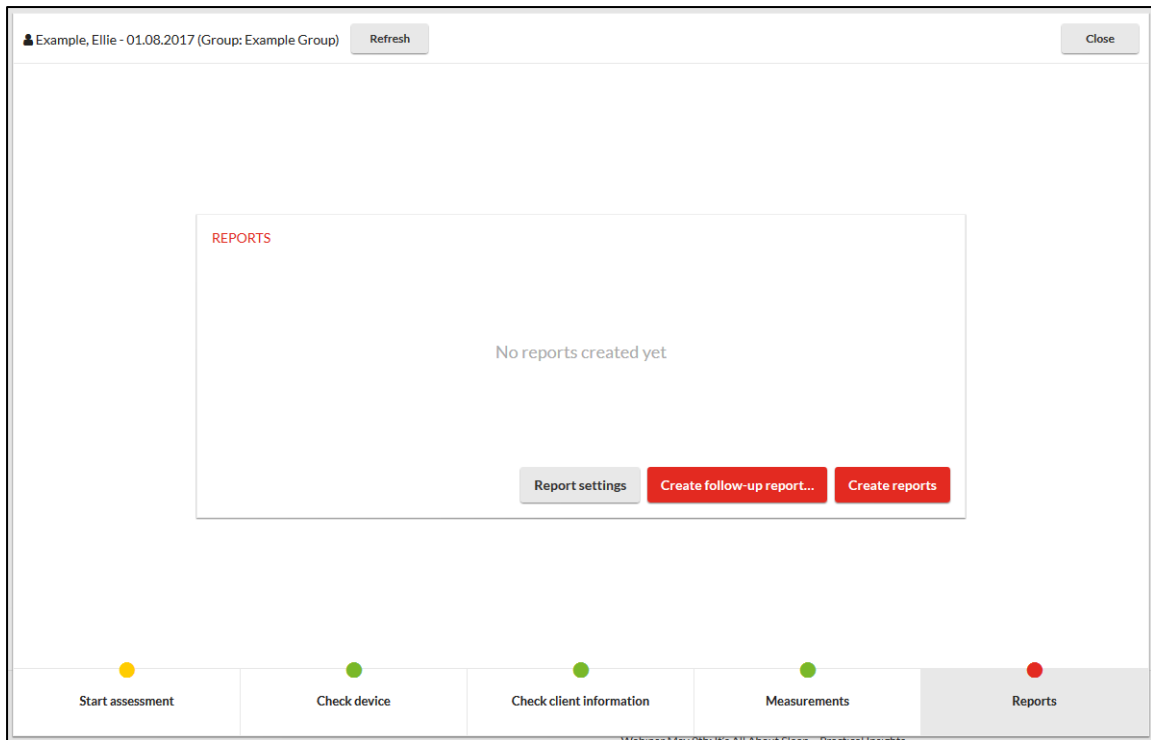
●
Individual reports

●
Group reports

●
Customer surveys

From the *Status* column you can check the status of the reports. In order to create or view the report of some client, click *Create/view* button next to the client's name.

The client's *Create reports* view opens.



Via the Report settings button you can select the report language, the reports you want to create and set other report settings. Remember to save the changes.

REPORT SETTINGS

Language

Reports

Measurement units SI units Imperial units

Print person ID instead of name

Include front page

Include pre-questionnaire page

Include goals page

When the report settings are done, you can create reports by clicking *Create reports*.



After the reports are created you can see them listed in the same view.

The screenshot shows a user interface for viewing reports. At the top, there is a header with a user profile icon, the name 'Example, Eddie - 08.11.2016', a group name '(Group: Center example)', and a 'Refresh' button. A 'Close' button is circled in blue in the top right corner. Below the header is a 'REPORTS' table with the following data:

Report	Created	Sent	Language	Open	Send	Delete
Lifestyle Assessment reports	18.05.2018 11:54	-	English	Open	Send	Delete
Specialist report	18.05.2018 11:54	-	English	Open	Send	Delete

Below the table are three buttons: 'Report settings', 'Create follow-up report...', and 'Create reports'. A red circle highlights a notification below the table: 'Customer survey will be sent on 01.06.2018. [Edit...](#)'.

Now you can open reports, send them via email or delete them.

Below the report table you will see also the status of Customer survey. The Customer survey includes general feedback questions about Lifestyle assessment. The survey is automatically sent at the next day of the report creation. If you want to edit the sending date or prevent the survey sending, select *Edit*.

When you have created you client's reports, you can move back to group view by selecting *Close* in the top right corner.

INDIVIDUAL REPORTS Search...

Name	Status	Reports
Example, Eddie	● Reports created	Create/view...
Example, Ellie	● Reports created	Create/view...

2/2 reports created Download all
2/2 ready for reporting Create all...

In the group view you can also create all the reports of the measurements ready for reporting at the same time by selecting *Create all*.

You can also open all the created report by selecting *Download all*.

4.5.2. Group reports

In order to create group reports move to *Group reports* step.

Click *Create group reports*.

The screenshot shows a web interface for a group. At the top, there's a header with 'Example Group', 'Refresh', 'Delete', and 'Close' buttons. Below this is a main content area with a 'GROUP REPORTS' section. This section contains a table with columns: 'Report', 'Created', 'Language', 'Assessments', and 'Open'. Below the table, there's a 'Remove' button, the text '3 / 3 assessments ready for reporting', and a 'Create group reports...' button which is circled in red. At the bottom, there's a navigation bar with tabs: 'Group details', 'Devices', 'Clients' information', 'Measurements', 'Individual reports', 'Group reports' (which is highlighted), and 'Customer surveys'.

In the next step you can select which reports you want to create as well as the report settings.

The 'Report settings' dialog box contains the following elements:

- Report settings**
 - Language: English (dropdown menu)
 - Measurement units: SI units Imperial units
 - Print person ID instead of name
- Reports to create**
 - Project Summary
 - Lifestyle Group report
 - Pre-questionnaire Summary
 - Specialist Group report
 - Physical Workload Group report
- Buttons: **Create reports** (red), Cancel

When you are ready, click *Create reports*.

If you chose Project summary, select the content of the summary in the opening window.

Select contents for Project Summary

The report will be summarized from the results of group Example Group. You can include another group assessment to see the results alongside.

Group 1: Example Group (3 assessments)

Group 2:

 0 assessments

Front cover text (max. 50 characters)

Write e.g. group's name, month and year.

Include also

Goals page

Recommendations page

Write the recommendations that you give for the group based on the results. Recommendations will be shown in the report.

Feedback from participants

You can select this if there are at least 10 responses to the customer survey.

Changes between the selected group assessments

The comparison includes only the persons who are involved in both of the selected groups.

If you want, you can include to summary also results of some other group. You can also add some identifying text to summary's cover page. In addition you can include goals page, a page with your own recommendations, feedback from participants or comparison of the changes of the results of those clients who have taken part in both selected groups.

After the group reports are created, you will see them listed in the *Group reports* step.

GROUP REPORTS				
Report	Created	Language	Assessments	Open
Project Summary	31.07.2017 13:08	English	3 / 3	Open
Lifestyle Group report	31.07.2017 13:08	English	3 / 3	Open

[Remove](#) 3 / 3 assessments ready for reporting [Create group reports...](#)

You can open the report by clicking *Open* or, if needed, delete them by using the *Remove* button in the low left corner.

4.6. Customer surveys to group

In the *Customer surveys* step you can view and edit the surveys sent to your clients. More about the Customer survey can be read from the page 46.

The screenshot shows a web interface for managing customer surveys. At the top, there are buttons for 'Refresh' and 'Delete', and a 'Close' button in the top right. The main content area is titled 'CUSTOMER SURVEYS' and contains a table with the following data:

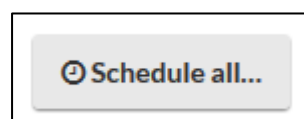
Name	Customer survey status	
Example, Client	Will be sent 01.08.2017	Edit
Example, Ellie	Will be sent 01.08.2017	Edit
Example, Estrella	Not sent	Edit

Below the table is a 'Schedule all...' button. At the bottom of the interface is a navigation bar with several tabs: 'Group details', 'Devices', 'Clients' information', 'Measurements', 'Individual reports', 'Group reports', and 'Customer surveys'. The 'Customer surveys' tab is currently selected and highlighted.

Customer survey status column shows you is the survey already sent and has the client answered to it. Click *Edit* to change the survey sending date, resend the survey or prevent the sending.

The dialog box shows a checked checkbox for 'Send customer survey automatically on'. Below this is a date picker set to '01.08.2017'. At the bottom, there are three buttons: 'Send now' (with an envelope icon), 'Save' (with a checkmark icon), and 'Cancel' (with an X icon).

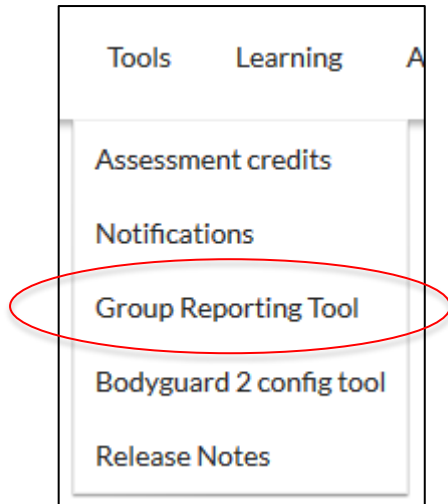
Schedule all function allows you to set the sending date to whole group.



5. Group reporting tool

With Group reporting tool you can create group reports from individual lifestyle assessments.

Select *Tools > Group Reporting Tool* from the main page of Lifestyle Assessment.



In opening view you can see listed all the group reports created with the tool.

The screenshot shows a table titled 'GROUP REPORTING TOOL' with the following data:

Created	Group identifier	Report type	Group size	Language	Open	Edit
08.05.2017 12:32	Example	Project Summary	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Lifestyle Group report	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Specialist Group report	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Pre-questionnaire Summary	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Physical Workload Group report	25	Finnish	Open	Edit
06.02.2017 15:00	Example reports	Lifestyle Group report	3	English	Open	Edit

At the bottom right of the interface, there is a red button labeled 'New group report...' and a 'Close' button, both circled in red.

There are listed report creation date, group identifier, report type, group size and language of the report. You can open or edit the reports by selecting either *Open* or *Edit* next to the report you want to handle.



In order to create a new group report select *New group report* from the low right corner of the view.

NEW GROUP REPORT

Collect assessments for the group report. When you have selected the assessments, click Create reports to continue to report settings.

Name	Link sending date	Group	Artefact %
------	-------------------	-------	------------

Add individual profiles or groups to the report by clicking *Add individuals/groups* buttons.

Select the assessments by moving them to the list on right. Hold down Ctrl or Shift key to select multiple rows.

Q example

Name	Name
▶ Athlete (Example), Jane	▼ Eddie, Example
▶ Example, Client	Assessment 28.07.2017
▶ Example, Eddie	
▼ Example, Ellie	
Assessment 01.08.2017	
Assessment 23.02.2012	
▶ Example, Estrella	

Select the assessments or groups you want to add and move them to table on the right-hand side with *Add* button. *Remove* button allows you to remove selected assessment/group.

When you have done the selections, click *OK*.

Selected individuals and groups can now be seen in New group report view.

NEW GROUP REPORT

Collect assessments for the group report. When you have selected the assessments, click **Create reports** to continue to report settings.

Name	Link sending date	Group	Artefact %
Client Example	01.08.2017	Example Group	0 %
Ellie Example	01.08.2017	Example Group	0 %
Elli Esimerkki	14.10.2016	Esimerkkiryhmä	3 %

Delete
+ Add individuals...
+ Add groups...
Create reports
Cancel

If you want to remove some lifestyle assessment, select it and click *Delete*.

The group report can be created by selecting *Create reports*.

Next you will need to define the report settings.

Report settings

Group identifier

Language ▼

Measurement units SI units Imperial units

Print person ID instead of name

Reports to create

Project Summary

Lifestyle Group report

Pre-questionnaire Summary

Specialist Group report

Physical Workload Group report

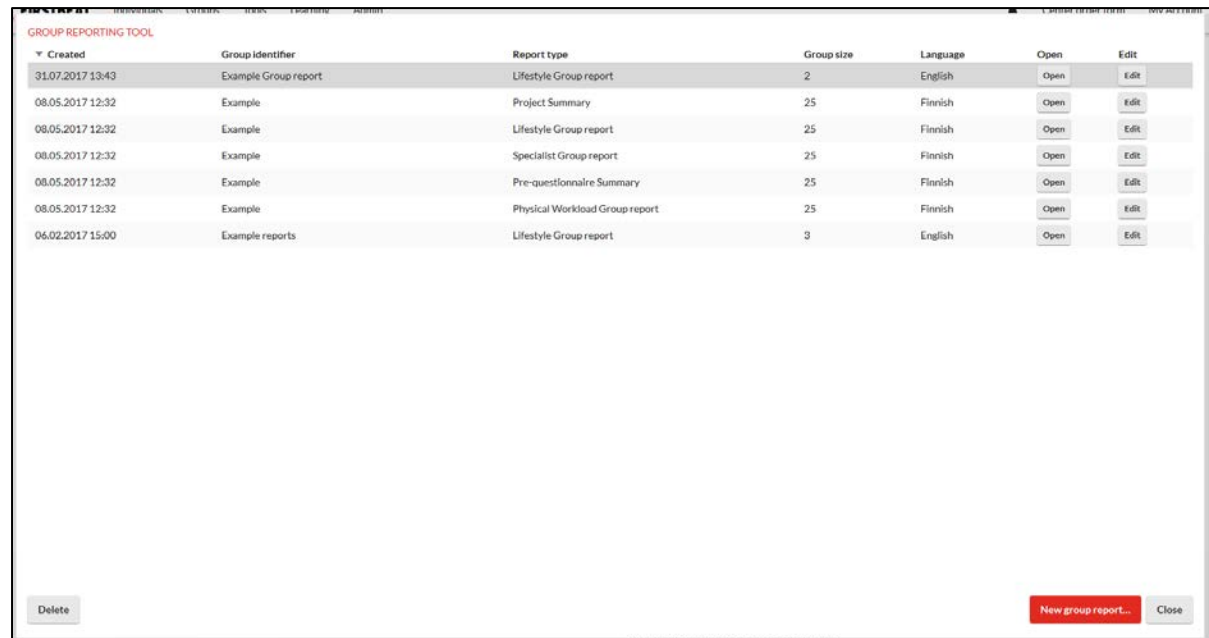
Create reports
Cancel

Group identifier helps you to recognize the group in question. Select also the report language and reports you want to create.

When you are ready with the settings, click *Create reports*.

If you selected Project summary, set next the settings for this report. More about Project summary can be read under Group reporting page 66.

When reports are created, you can see them in the *Group Reporting Tool* view.



The screenshot shows the 'GROUP REPORTING TOOL' interface. It features a table with the following columns: Created, Group Identifier, Report type, Group size, Language, Open, and Edit. The table contains seven rows of example reports. At the bottom of the interface, there are buttons for 'Delete', 'New group report...', and 'Close'.

Created	Group Identifier	Report type	Group size	Language	Open	Edit
31.07.2017 13:43	Example Group report	Lifestyle Group report	2	English	Open	Edit
08.05.2017 12:32	Example	Project Summary	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Lifestyle Group report	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Specialist Group report	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Pre-questionnaire Summary	25	Finnish	Open	Edit
08.05.2017 12:32	Example	Physical Workload Group report	25	Finnish	Open	Edit
06.02.2017 15:00	Example reports	Lifestyle Group report	3	English	Open	Edit

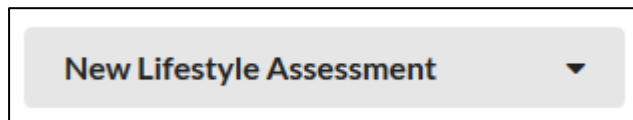
6. Lifestyle Assessment with Firstbeat Center

This section provides instructions for how to conduct lifestyle assessments if you have the Firstbeat Center service in use. Starting the assessment process, checking the client information and creating reports is done essentially in the same way as normal assessments. Sending devices and uploading measurements will be carried out by the Firstbeat Center.

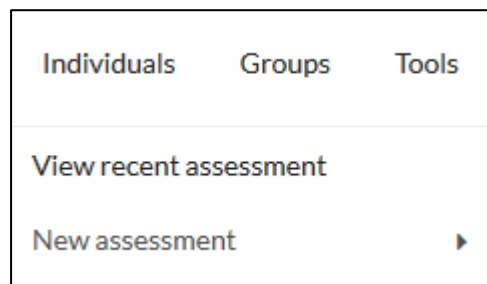
6.1. Lifestyle assessment to individuals

6.1.1. Creating a lifestyle assessment

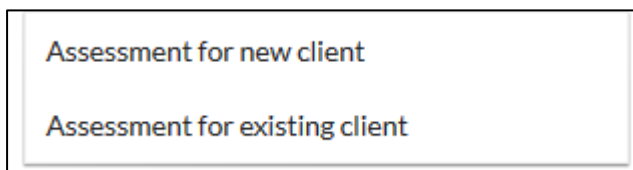
1. Select *New Lifestyle Assessment* (Either from the Home page, via *New Lifestyle Assessment* tab, or by selecting *Individuals* → *Start new assessment*)



or



2. Select if you want to create a lifestyle assessment for a new or an already existing client.



Select **Use Firstbeat Center**.

SELECT SERVICE MODEL ?

Use your own devices

Use Firstbeat Center

Close

When you select assessment for a new client fill in the assessment details in the opening window: name, language and email address of your customer. Set also the sending and expiration date for the link.

ASSESSMENT DETAILS

Client Ellie Example

First name Ellie

Last name Example

Language Finnish

E-mail ellie.example@example.ex

Journal link will be sent on Today

Journal link expires on 14.11.2017

Professional user Specialist, Example

Service model Center ?

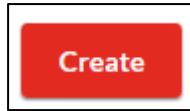
Create Cancel

Note! If you create an assessment to an existing client, check the assessment details and set the link sending and expiration dates. From this step forward, the process will be similar for new and existing clients.

Center+ service: If you have Center+ service in use select 'Use Firstbeat Center+'. This differs from the normal Center service in the way that reports are created by Firstbeat. In other parts, the lifestyle assessment will be handled similarly than other Center assessments.

The server will send an email to your customer that includes a link to order the lifestyle assessment. The email will be sent automatically on the date that you have set. The language of the email is determined by the language you choose in the assessment details.

3. When you have filled the information needed, click *Create*.

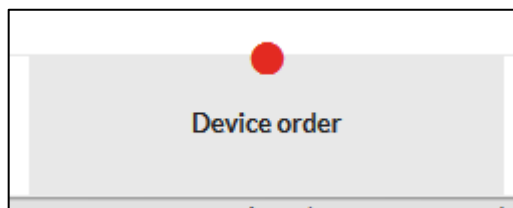


4. Lifestyle assessment has now been created successfully. You can edit the assessment details by selecting *Edit* in Start assessment task.

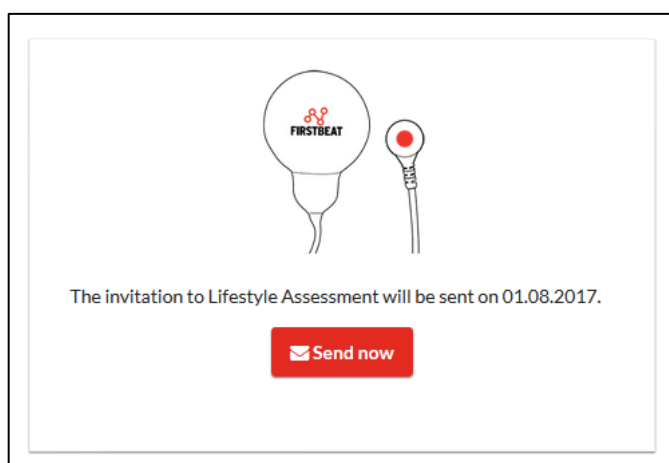
6.1.2. Device order

Your client will get an email with an **Invitation to Lifestyle Assessment** on the date that you set. Via the invitation, your client can order a device for the measurement.

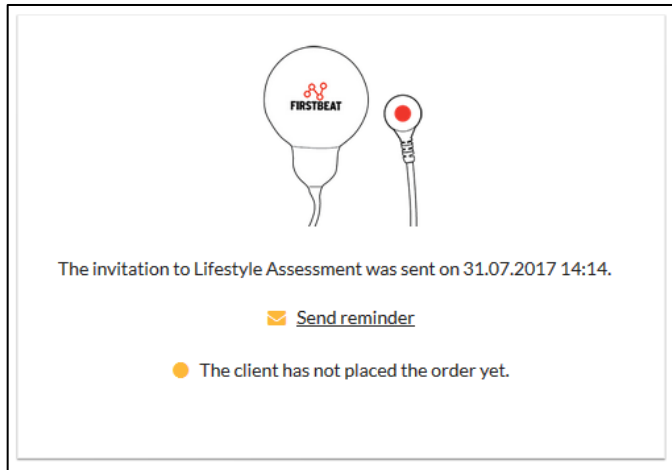
The status of the invitation and the order can be checked under the Device order task.



The view shows you the sending date. The invitation can also be sent right away by selecting *Send now*.



When the invitation has been sent, you will see the sending date and if the client has already made the order. If needed, you can re-send the invitation by selecting *Send reminder*.



When the order has been made, you will see the ordering date.



After making the order, your client will get an email with a link to the background information form and journal. The device will be sent the next work day after the order.

Your client will now do the measurement and return the device to Firstbeat Center, where the measurement is uploaded to the server.

If your client's device is lost or has got faulty during the measurement you can create a new order to him/her via the *Reorder* button. By doing a reorder, a new lifestyle assessment will be created to your client and a new device will be sent. A new journal link will also be automatically sent. The new link is valid for three weeks.

Reorder

1. Go to *Device order* tab and click *Reorder...*
2. Select a reason and click *Next*. Add additional information if needed.
3. Select how to order the new measurement device.

- a. By sending the order link to the client, the client themselves can input their order information (e.g. delivery address).

The client ordered the device on 11.11.2016.

Reorder... ?

Select the reason for the reorder for the client Example, Eddie.

- The measuring device is lost
- The measurement did not start / Empty device
- The measurement ended too early
- Lots of missing heart rate
- Other reason

Additional information:

[? What is reorder?](#)

Next Cancel

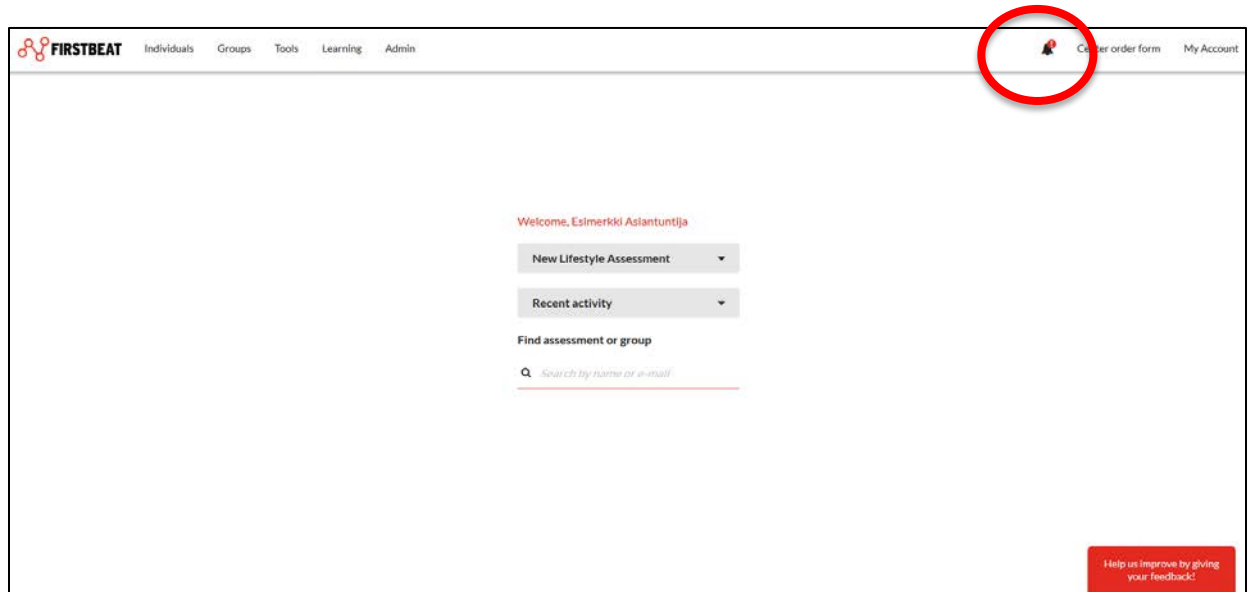
Select how to order the new measurement device.

- Order to the client's address (Check the address!)
example street 1, 50500, example city, China
- Send the order link to the client
- Order for the client (Center order form)

Place order Cancel

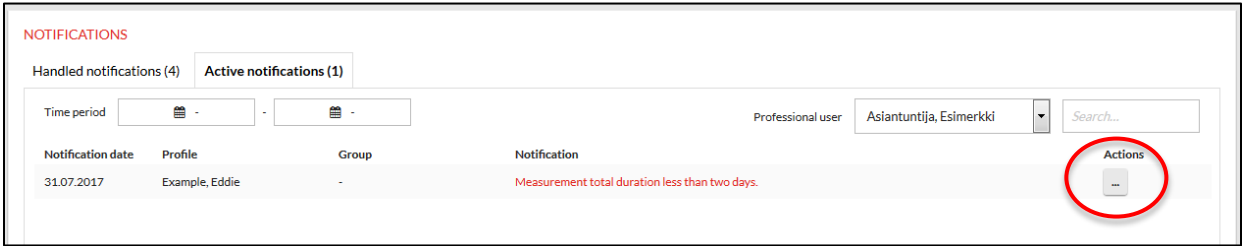
6.1.3. Actions after the measurement

After your client's device has returned to Firstbeat Center and the measurement has been uploaded, you will see the notifications on the home page of Lifestyle Assessment.



All the notifications that you have not checked are listed under Active notifications. This means that the lifestyle assessments, where the measurement has been uploaded by Firstbeat Center are shown in this list. Notifications may also include other automatic notes about the measurement, for example if the measurement is too short or there is lot of error. An employee at the Firstbeat Center can also manually add some notes that your client has sent with the device.

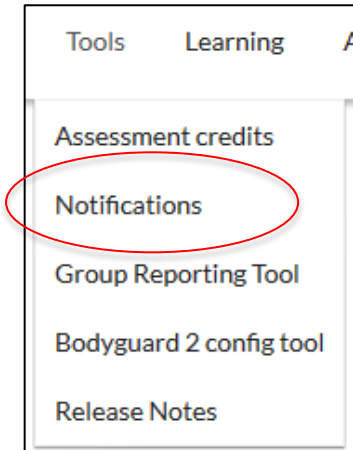
You can view the measurement and finish the lifestyle assessment by clicking the button at *Actions* column.



Check client information and measurement and create reports in the same way as with normal lifestyle assessments. The instructions for these steps can be found in sections **3.3 Client information**, **3.4.3 Edit measurements**, **3.5 Creating reports** and **3.6 Customer survey**.

If you have **Center+ service** in use the notifications will show you the assessments to where Firstbeat has created reports ready. Select *Actions* button to view the reports and to print them to your client for feedback.

When you have checked all the lifestyle assessments with notifications, the notifications will move under the Handled notifications tab. All notifications can also be checked by selecting *Tools > Notifications* from the home page.



If you want to receive the notifications also to your email you can do the setting at *My settings*. Select *My account > My settings* and select *Receive e-mail notification when Firstbeat Center uploads measurements*.

My Account

My Settings

Log out

MY SETTINGS

Person information Settings

Timezone Europe/Helsinki

Date format 31.07.2017 31 Jul 2017

Create Physical Workload report from worktime only

Show the Training Effect boxes on the Lifestyle Assessment reports

Receive e-mail notifications when

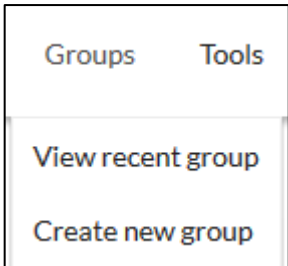
Firstbeat Center uploads measurements

Save Cancel

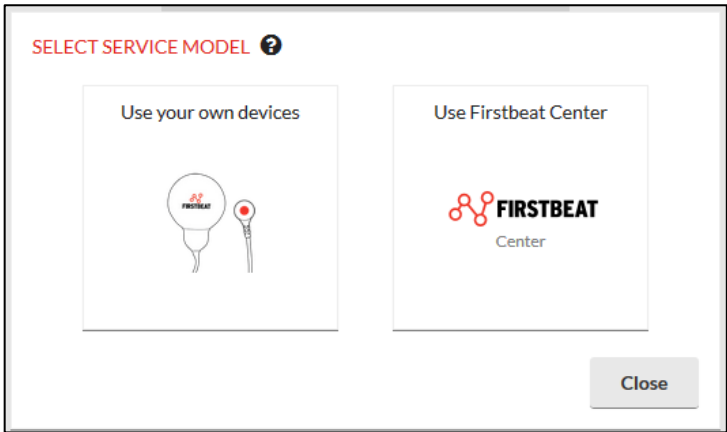
6.2. Lifestyle assessment to a group

6.2.1. Creating a group

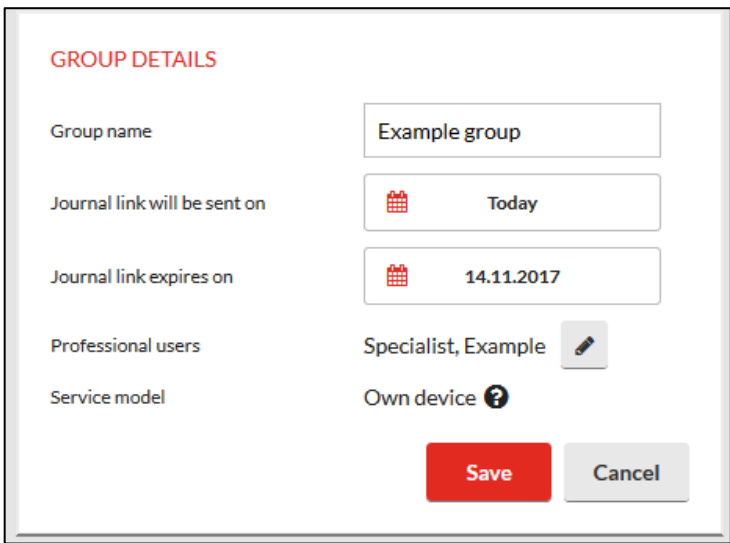
Start creating a group by selecting *Groups > Create new group*.



Select option **Use Firstbeat Center**.



Fill in the group details: group's name and sending and expiration dates of the link. You can also change and add professional users to the group from the editing tab next to the professional user's name.



Center+ service: If you have Center+ service in use select 'Use Firstbeat Center +'. This differs from the normal Center service in the way that reports are created by Firstbeat. In other parts the lifestyle assessment will be handled similarly than other Center assessments.

When you are ready, click *Save*.

Group is now created and the group view opens.

The screenshot shows a web interface for managing a group. At the top, it says 'Example Group Center' with a 'Refresh' button on the left and a 'Close' button on the right. The main content is divided into two panels. The left panel, titled 'GROUP DETAILS', contains a table with the following information:

Group name	Example Group Center
Link will be sent on	31.07.2017
Link expires on	21.08.2017
Professional users	Esimerkki Asiantuntija
Use Firstbeat Center	Yes ⓘ
I use my own devices	No ⓘ

Below the table are two buttons: 'Advanced...' and 'Edit'. The right panel, titled 'Members (0)', has a search box with the placeholder text 'Search...'. Below the search box is a table with a single header 'Name'. At the bottom right of this panel is an 'Add' button with a dropdown arrow. At the bottom of the interface is a navigation bar with seven tabs: 'Group details' (selected), 'Device orders', 'Clients' information', 'Measurements', 'Individual reports', 'Group reports', and 'Customer surveys'. Each tab has a red dot above it. At the very bottom, there is a small text string: 'Webinar May 9th: It's All About Sleep - Practical Insights'.

To add members to group, select Add. Note that members need email addresses so that the order links can be sent.

6.2.2. Device orders

You can view the statuses of your clients' invitations and orders in the *Devices* step.

Client	Invitation status	Order status
Example, Eddie	Will be sent 31.07.2017	Order not placed
Example, Edward	Will be sent 31.07.2017	Order not placed
Example, Ellie	Will be sent 31.07.2017	Order not placed

0/3 orders placed

If the invitation link is not already sent, you can send it manually by clicking *Send now*.

If you need to send the link again to some client, click *Send reminder*.

When your client does an order, he/she will get an email with journal link at the same day. The device will be sent at the next work day.

When the order has been made but the device has not yet been sent, the status of the order is following:

Order status

● Order in progress

When the order has been done and the device sent the order status is following:

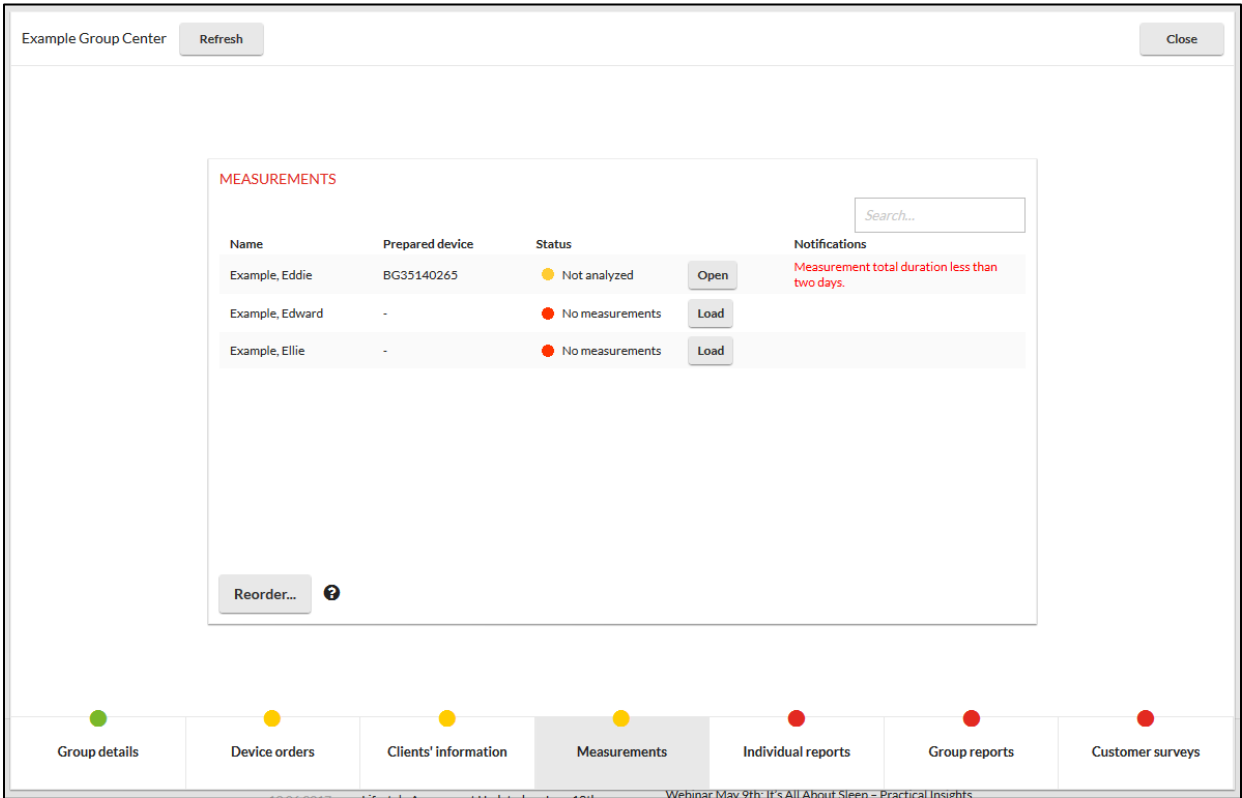
Order status

● Order handled on 31.07.2017

Your client will now do the measurement and return the device to Firstbeat Center where the measurement is uploaded to Lifestyle Assessment.

When the measurement is done, the device returned to Firstbeat Center and the measurement uploaded, you will see a notification in the home page of Lifestyle Assessment. More about the notification can be read from chapter 5.1.3. **Actions after the measurement.**

You can view the uploaded measurements also in the group assessment's *Measurements* step.



Uploaded measurements can be previewed and edited via the *Open* button.

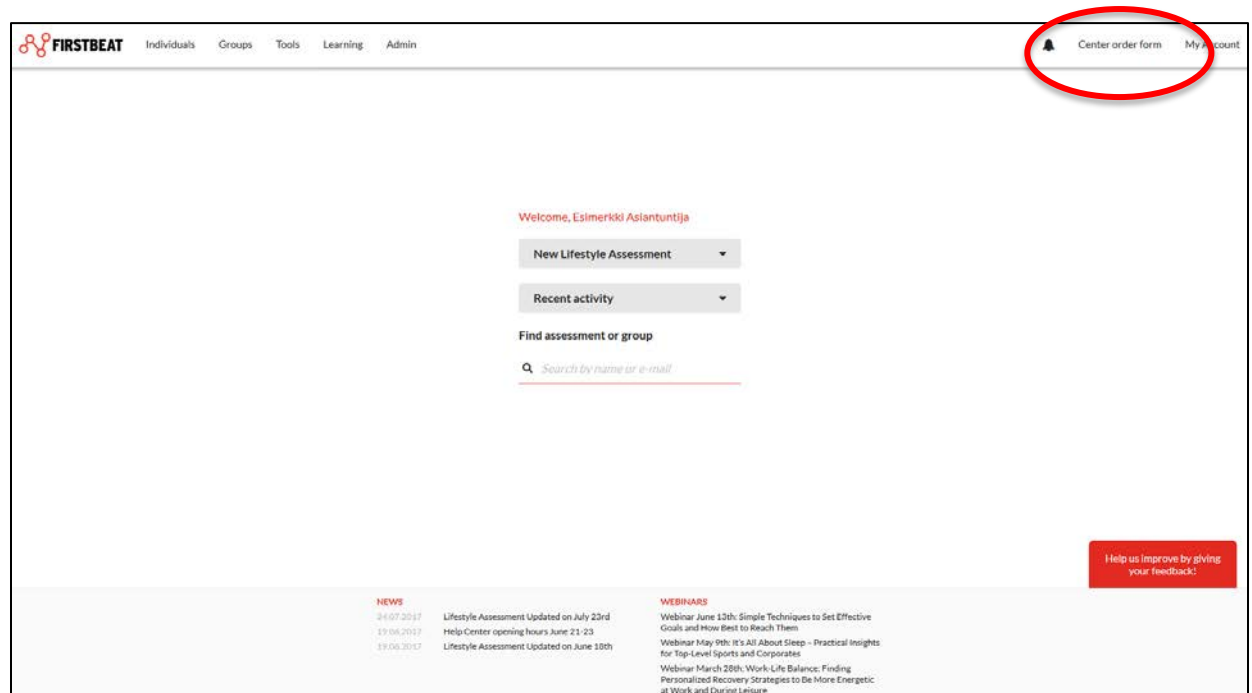
If you have **Center+ service** in use you will see the assessments to where Firstbeat has created reports ready via Notifications. Select *Open* to view the reports and to print them to your clients for feedback.

Check your clients' information and the quality of the measurements and create reports as in normal group assessments. These steps are described in chapters **4.3. Clients' information**, **4.4. Uploading and editing measurements**, **4.5. Creating reports to group** and **Customer surveys to group**.

6.3. Ordering the measurement for client

When you want to order measurement for your client use the *Center order form* in the Lifestyle Assessment main page.

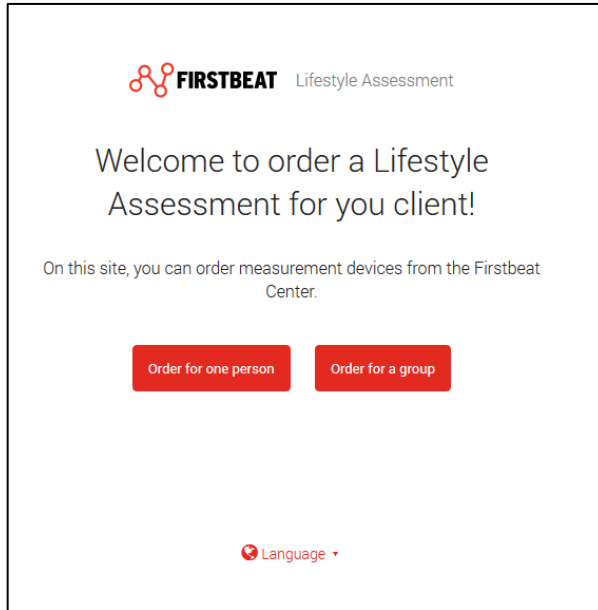
Note! When you do an order via the Center order form, the software automatically creates a new assessment to your client/group. You will not need to create assessments separately.



The screenshot shows the Firstbeat web interface. At the top left is the Firstbeat logo and navigation links: Individuals, Groups, Tools, Learning, Admin. At the top right, the 'Center order form' link is circled in red, along with a 'My account' link. The main content area displays a welcome message: 'Welcome, Esimerkki Asiantuntija'. Below this are two dropdown menus: 'New Lifestyle Assessment' and 'Recent activity'. A search bar is labeled 'Find assessment or group' with the placeholder text 'Search by name or e-mail'. At the bottom right, there is a red button that says 'Help us improve by giving your feedback!'. The footer contains two columns of news and webinars.

NEWS	WEBINARS
24.07.2017 Lifestyle Assessment Updated on July 23rd	Webinar June 13th: Simple Techniques to Set Effective Goals and How Best to Reach Them
19.06.2017 Help Center opening hours June 21-23	Webinar May 9th: It's All About Sleep - Practical Insights for Top-Level Sports and Corporates
19.06.2017 Lifestyle Assessment Updated on June 10th	Webinar March 28th: Work-Life Balance: Finding Personalized Recovery Strategies to Be More Energetic at Work and During Leisure

In the opening view select if you want to do an order for one person or for a group.



When you order lifestyle assessment to one person, first fill in the client's information.

The screenshot shows the "Order for one person" form. The title is "Order for one person" with the instruction "Place the order by filling this form. Fields marked with an asterisk are required." Below the title is a progress indicator: "Step 1/4" and a green bar showing "25%". The form is titled "Person information" and contains the following fields:

- Person's name**
 - First name*:
 - Last name*:
- Person's email***:
- Person's language***: (dropdown menu)

At the bottom right is a red "Next" button. At the bottom left are two links: "Back to main page" and "Clear fields".

Then give the delivery information. You can order the device either directly to your client or some other address (e.g. to yourself if you give the device to client during your meeting).

Order for one person

Add delivery address of the measurement device.
Fields marked with an asterisk are required.

Step 2/4

50%

Delivery information

Delivery address
Company name (if ordered to company's address)

First name*

Last name*

Street address*

Postal code*

City*

Country*

[Back to main page](#) [Clear fields](#)

In the next phase set the sending date. As a default the device will be sent from Firstbeat Center during the next workday but you can also schedule some other sending date if needed.

Order for one person

Select when the measurement device will be sent.
Fields marked with an asterisk are required.

Step 3/4

75%

Order schedule

Measurement device will be dispatched the next workday
Estimated delivery date is 2-3 workdays from order date

I want to schedule the dispatch of the measurement device for later

Date when the journal link will be sent*

[Back to main page](#) [Clear fields](#)

Check that all the information is filled correctly. When everything is correct, click *Send order*.

Order for one person

Please check carefully once more to make sure that all information is filled correctly. After this, send your order.

Step 4/4

100%

Person information

Person's name
Eddie Example

Person's email
eddie.example@example.esim

Person's language
English

Delivery information

Recipient
Example company, Example Specialist

Delivery address
Exampleroad, 131313, Examplecity

Country
Finland

Order schedule

Shipping date of device
09.02.2017

Date when the journal link will be sent
08.02.2017

[Back to main page](#)

When you have sent the order your client's assessment will appear to Lifestyle Assessment and the device will be sent from the Firstbeat Center at the date you scheduled.

When you order a lifestyle assessment to a group, first fill in the group information.

Order for a group

Place the order by filling this form.
Fields marked with an asterisk are required.

Step 1/4

25%

Group information

Group name*

Example group

Participants' e-mail addresses*

One e-mail address per line. Language selection determines the language of the e-mails and instructions sent to the client.

Language: English

eddie.example@example.esim
elsie.example@example.esim

Do you want to add participants in different languages?

Number of participants: 2

Next

[Back to main page](#) [Clear fields](#)

Add the participants' email addresses to the given field one per line. Above the field you will see the language of the participants. If you want to add also participants in different languages, click *Do you want to add participants in different languages?* and select the languages you want. Now you can see an own field for each language.

Select languages that you want to show.

English
 Finnish
 Swedish
 German

Close **Show**

Participants' e-mail addresses*
 One e-mail address per line. Language selection determines the language of the e-mails and instructions sent to the client.

Language: English

eddie.example@example.esim
 elsie.example@example.esim

Language: German

Add participants here...

[Do you want to add participants in different languages?](#)

Number of participants: 2

When the group information has been filled, move to the next phase and fill in the delivery address. All the devices will be delivered to one address.

Order for a group

Add delivery address of measurement devices.
 Fields marked with an asterisk are required.

Step 2/4

50%

Delivery information

Delivery address
 Company name (if ordered to company's address)

Example company

First name*

Example

Last name*

Specialist

Street address*

Exampleroad

Postal code*

131313

City*

Examplecity

Country*

Finland

[Previous](#) [Next](#)

[Back to main page](#) [Clear fields](#)

Next set the sending date of the devices. As a default the devices will be sent from Firstbeat Center during the next workday but you can also schedule some other sending date if needed.

Order for a group

Select when measurement devices will be sent.
Fields marked with an asterisk are required.

Step 3/4

75%

Order schedule

Measurement devices will be dispatched the next workday
Estimated delivery date is 1-2 workdays from order date

I want to schedule the dispatch of measurement devices for later

Date when the journal link will be sent*

📅

Previous
Next

Back to main page
Clear fields

Check that all the information is filled correctly. When everything is correct, click *Send order*.

Order for a group

Please check carefully once more to make sure that all information is filled correctly. After this, send your order.

Step 4/4

100%

Group information

Group name
Example group

Participants' e-mail addresses
English:
eddie.example@example.esim
elsie.example@example.esim

Number of participants: 2

Delivery information

Recipient
Example company, Example Specialist

Delivery address
Exampleroad, 131313, Examplecity

Country
Finland

Order schedule

Shipping date of devices
09.02.2017

Date when the journal link will be sent
08.02.2017

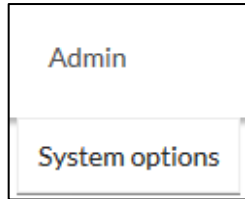
Previous
Send order

Back to main page

When you have sent the order the group will appear to Lifestyle Assessment and the devices will be sent from the Firstbeat Center at the date you scheduled.

7. System options

System options can be found from the main page of Lifestyle assessment by selecting '*Admin*' > '*System options*'.



7.1. General options

Under the *General* tab you can add the appointments system you use if this functionality is on at your account.

Here you can also set the other service options: If you want to use pre-questionnaire, customer survey and/or goals questionnaire.

 A screenshot of the 'SYSTEM OPTIONS' configuration page. The page has a header with the title 'SYSTEM OPTIONS' and four tabs: 'General', 'Specialists', 'Service branding', and 'Event log'. The 'General' tab is active. Under the 'APPOINTMENT' section, there are three radio button options: 'Use Appointments system' (unchecked), 'Manual appointments' (checked), and 'MyFirstbeat appointments' (unchecked). Below these is a text input field for 'Appointments address'. Under the 'SERVICE OPTIONS' section, there are three checked checkboxes: 'Use pre-questionnaire', 'Use customer survey', and 'Ask Goals in end-user interface'. At the bottom right of the form area, there are two buttons: a red 'Save' button and a grey 'Close' button.

7.2. Specialists

Under the Specialists tab you can check all the specialists of your account as well as the Lifestyle assessment statistics.

SYSTEM OPTIONS

General **Specialists** Service branding Event log

Time period -

<p>Name</p> <p>Kara, Omena</p> <p>veli-matti.polonen@firstbeat.fi</p> <p>eero.vestola@firstbeat.fi</p> <p>The Admin, Teppo</p> <p>mikke.salminen@firstbeat.fi</p> <p>Koistinen, Nelli</p> <p>Asiantuntija, Esimerkki</p> <p>Model, Mike</p> <p>Trainer, Tom</p> <p>413896</p>	<p>STATISTICS</p> <p>The statistics is collected for the selected specialist during the selected time period. ?</p> <p>Assessments created 394</p> <p>Billable assessment reports created 77</p> <p>Credit reports created 61</p> <p>Credit reports created (Center) 0</p> <p>Assessment reports re-created 89</p>	<p>USER INFORMATION</p> <p>Name -</p> <p>Language -</p> <p>E-mail -</p> <p>Phone -</p>
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Total amount of specialists 10

7.3. Service branding

Via *Service branding* settings the main user of the Lifestyle assessment can edit the front page of Lifestyle assessment reports and the email send from the service.

SYSTEM OPTIONS

General **Service branding**

SERVICE PROVIDER LOGO

The logo is shown in the front page below the service name and in the footer area in the other pages. Upload the logo and also select e-mail message signature details.

Selected logo ? **End user e-mail message signature** ?

Show service provider logo
 Show service provider name

REPORT BOOKLET FRONT PAGE

Upload a picture to be shown in the front page of the report booklet. The picture replaces the top half area. Add also your service name which will be placed below the picture.

Selected picture ? **Text in front page** ?


Service name
Firstbeat Lifestyle Assessment

Text color #

At the top part of the view you can add your company's logo. The logo will be shown in the front page of Lifestyle assessment reports under the report name and in footer of other report pages. Besides that you can set the logo and your company's name to signature of automatic emails.

SERVICE PROVIDER LOGO

The logo is shown in the front page below the service name and in the footer area in the other pages. Upload the logo and also select e-mail message signature details.

<p>Selected logo ?</p> <div style="border: 1px solid gray; padding: 10px; text-align: center; width: 100%;">  </div> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> Upload... Remove </div>	<p>End user e-mail message signature ?</p> <p><input checked="" type="checkbox"/> Show service provider logo</p> <p><input checked="" type="checkbox"/> Show service provider name</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; width: 100%;"> Example Company </div>
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The image requirements for the logo are following:

- Format: JPG, PNG or GIF
- Width: at least 250 pixels
- Height: at least 120 pixels
- Size: max. 4 Mt

At the bottom part of the view you can edit the Lifestyle assessment front page by setting the picture and your own service name. You can also select the color used in the service name.

REPORT BOOKLET FRONT PAGE

Upload a picture to be shown in the front page of the report booklet. The picture replaces the top half area. Add also your service name which will be placed below the picture.

<p>Selected picture ?</p> <div style="border: 1px solid gray; padding: 10px; text-align: center; width: 100%;">  </div> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> Upload... Remove </div>	<p>Text in front page ?</p> <p>Service name</p> <p style="color: red;">Firstbeat Lifestyle Assessment</p> <div style="text-align: center; margin: 5px 0;"> Edit </div> <p>Text color # E32A21 </p>
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The picture needs to be either JPG, PNG or GIF format and maximum size for it is 4 Mt.

To add your own service name in different languages, select *Edit*.

Give the service name in appropriate languages.

Finnish	<input type="text" value="Hyvinvointianalyysi"/>	French	<input type="text" value="Évaluation du mode de vie Firstbeat"/>
English	<input type="text" value="Firstbeat Lifestyle Assessment"/>	Hungarian	<input type="text" value="Firstbeat életmód felmérés"/>
Swedish	<input type="text" value="Firstbeat Livsstilsanalys"/>	Norwegian	<input type="text" value="Firstbeat Livsstilvurdering"/>
German	<input type="text" value="Firstbeat Bericht"/>		

Remember to save the changes.

When you have added the picture and logo and finished with the settings select *Save*. You can always undo the changes by selecting *Restore defaults*.

SYSTEM OPTIONS

General **Service branding**

SERVICE PROVIDER LOGO

The logo is shown in the front page below the service name and in the footer area in the other pages. Upload the logo and also select e-mail message signature details.

Selected logo ?

End user e-mail message signature ?

Show service provider logo

Show service provider name

REPORT BOOKLET FRONT PAGE

Upload a picture to be shown in the front page of the report booklet. The picture replaces the top half area. Add also your service name which will be placed below the picture.

Selected picture ?

Text in front page ?

Service name

Firstbeat Lifestyle Assessment

Text color #

7.4. Event log

Under the *Event log* tab, you can view the events done by any of the specialists.

SYSTEM OPTIONS

General Specialists Service branding **Event log**

Select specialist

Asiantuntija, Esimerkki

Time period Sun 1. Oct - Today All time

Time	Event
24.10.2017 15:24:42	Logged in
11.10.2017 14:00:11	Logged in
06.10.2017 16:05:01	Observed measurement information: lines Anikka (id: 83946)
06.10.2017 16:05:01	Observed journal information: lines Anikka (id: 83946)
06.10.2017 16:05:00	Opened group: Group name 1 (id: 760)
06.10.2017 16:05:00	Opened assessment: Measurement start: 23.08.2015 (id: 4724) Profile: lines Anikka (id: 83946)
06.10.2017 16:04:52	Opened assessment: Measurement start: 11.08.2015 (id: 4594) Profile: lines Anikka (id: 83946)
06.10.2017 16:04:52	Opened group: kbgkjhu (id: 756)
06.10.2017 16:04:46	Opened group: Ryhmänimi (id: 1115)
06.10.2017 16:04:46	Opened assessment: Measurement start: 18.10.2016 (id: 7698) Profile: lines Anikka (id: 83946)
06.10.2017 16:04:46	Opened person profile: lines Anikka (id: 83946)

Close

Select the specialist from the drop-down list and set the time period you want to view.