qliqSOFT

ADMIN DASHBOARD GUIDE

Updated 9.16.2019

QliqSOFT Admin Dashboard

Managing and Supporting Your Qliq Group

INTRODUCTION

Welcome to Qliq! This guide will help you, a Qliq Administrator, successfully manage and support your Qliq group. If at any time you need assistance, please do not hesitate to reach out to us! Once you have been established as your groups' administrator you will be able to use your Qliq ID and password to login to the dashboard on the homepage of our website.

*Note**:** The Admin Dashboard left-side navigation panel is divided into three focus areas: Manage Group, Manage Activity, and Manage Features. Different options may be visible depending on the features and services you have purchased.*

TABLE OF CONTENTS

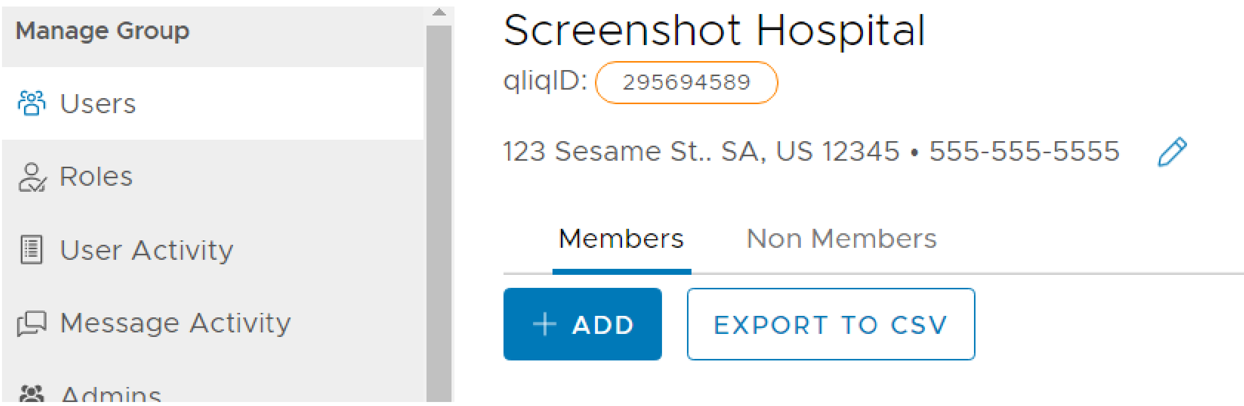
MANAGE GROUPS

ADDING / IMPORTING AND REMOVING USERS

Often one of the first steps of group setup is to add users to your group. We provide 3 simple options: Quick-Add users individually, import via CSV, or connect to your Active Directory.

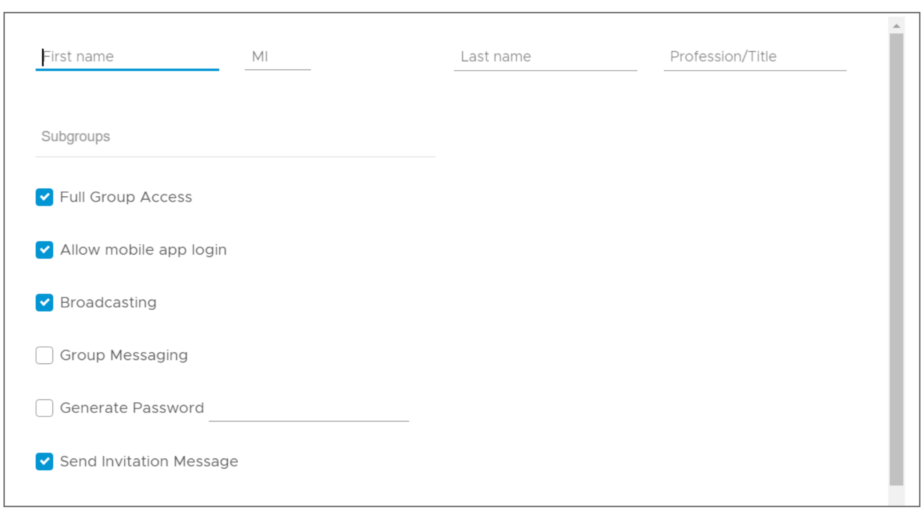
QUICK ADD

To add a user from the USERS page - simply click ADD then enter a mobile number or email address. You will be prompted with an invite form where you will need to fill-in basic user information and securities (See page 6 "Individual Securities" for definitions).



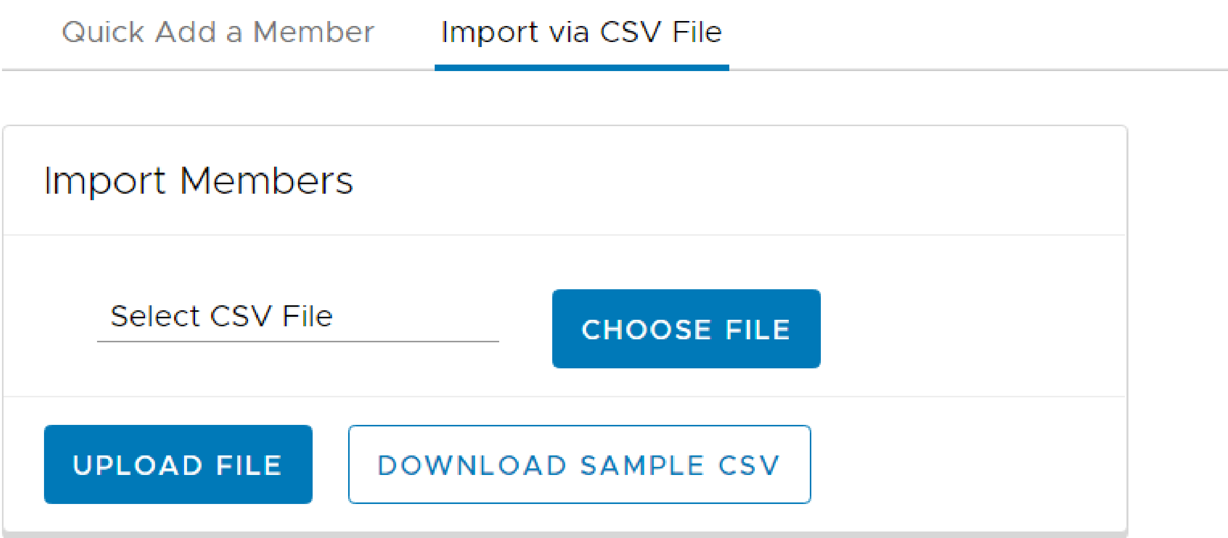
If you already have subgroups created, they will be displayed in the subgroups drop down menu. Click to add as many subgroup permissions to the user as needed. *(See page 9 "Subgroups").*

You can generate a password automatically, which will be included in the users' invitation to join, or uncheck the option to allow them to set their own. You are able to edit the invitation subject line but not the email itself. Invitations will include your group name, instructions for passwords, and reminders to download the application from the app store(s). The invite form allows you to uncheck "send invites" if you prefer to send the invitation at a later time and not notify the user immediately. The invitation email will appear to come from your groups "point of contact" - as designated on the Admins page. This helps prevent the invitations from going to SPAM *(See page 8 "Admins").*



CSV IMPORT

If you have multiple users you want to import at one time you can download and use the CSV template provided at: Users > Import Via CSV > Download Sample.



Download the template and fill in each column.

First Name, Middle Name, Last Name, Email/Mobile, Title and Department are used to identify the user.

Full Group Access, Mobile App Login, Broadcast Messaging, and Group Messaging, impact the user's individual security rights. (*See* page. 6 *"Individual Securities"* for definitions).

Group1, Group2, and Group3 - allow you to prepopulate the user to a specified subgroup. If you need more subgroups, insert that many columns and label them accordingly and with no spaces: Group 4, Group5, and so on.

The optional Password column allows you to pre-set the users' password. .

First Name	Mid Name	Last Name	Email/Mobile	Title	Departmen	Full Group Access	Mobile App Login	Broadcasting	Group Messaging	Group1	Group2	Group3	Password
John		Doe1	jdoe1@doe1.com	Staff	10200	y	y	y	n	Front Offic	Billing	Dallas	!123456
John		Doe2	jdoe2@doe1.com	Nurse	10200	y	y	y	n	OnCall	Floor A	Dallas	1!23456
John		Doe3	jdoe3@doe1.com	Physician	10200	y	y	y	n	OnCall	Clinic	Dallas	12!3456
John		Doe4	jdoe4@doe1.com	Staff	10200	y	y	y	n	Billing	Back Offic	Arlington	123!456
John		Doe5	jdoe5@doe1.com	IT/HIM Manager	10200	y	y	y	n	Support	IT	Fortworth	1234!56
John		Doe6	jdoe6@doe1.com	Administrator	IT	y	y	y	n	Front Offic	Admitting	Fortworth	12345!6
John		Doe7	jdoe7@doe1.com	Clinician	IT	y	y	y	n	Pediatrics		Dallas	123456!
John		Doe8	jdoe8@doe1.com	Nurse	Sales	y	y	y	n	Homecare		Fortworth	1234!6
John		Doe9	jdoe9@doe1.com	Administrator	Billing	y	y	y	n	Directors	Corporate	Fortworth	12346!
John		Doe10	9722352001	Administrator	Billing	y	y	y	n	Directors	Corporate	Fortworth	12346!

Once the file is complete, save it locally and then return to the Users > CSV Import page and upload the file. You will be prompted with a mapping window - ensure the system has correctly identified each column and then import.

If the password column in the CSV is completed. Qliq invitations containing those passwords will be automatically sent out as soon as the CSV is uploaded. If the Password column is left blank, then those uploaded users will be staged on the Qliq dashboard.

ACTIVE DIRECTORY

We provide a free and simple tool to connect your Active Directory to Qliq to easily manage users. QliqDIRECT is downloaded from the QliqDIRECT page. Please refer to the QliqDIRECT Admin Guide for more information.

REMOVING USERS

You're able to remove non-AD members from the Users page. Search for the user and select the gear icon on the far right.

Remove

To remove the user simply choose REMOVE and confirm from the gear icon menu.

Remote App Wipe

If the user has simply lost their device and doesn't need to be removed - you can choose to remotely wipe the Qliq app data from their device by choosing "Remote App Wipe".

Removing from AD

For AD users, removing the user from Active Directory will also remove them from your Qliq group.

Disable / Enable

From this same tools menu, you can temporarily pause a users' access by selecting Disable user.

ADDITIONAL USER SETTINGS

Users can be defined as either members or non-members and have unique individual-level securities.

USER TYPES

Member

"Members" are individuals in your organization who can see and contact users in the organization's contact list or subgroups.

Non-Member

A "Non-Member" is a special user type that restricts the contact list access for external users such as consulting physicians or patients. Non-members can see members, but they cannot see other non-members. For example, if external consulting physicians are non-members, then they can see your internal staff (members) but not other consulting physicians (non-members).

INDIVIDUAL SECURITIES

Individual securities are defined at the point of invitation and can be defined at any point by selecting the user from the Users page and accessing the tool icon to the far right. Choose "Edit" to manage individual user securities.

Full Group Access

If Full Group Access is on, this user will be able to see and contact all other users in the group. If Full Group Access is off, this user will be restricted to seeing and communicating only with other users sharing the same subgroup. *(See page 9 "Subgroups").*

Allow Mobile App Login

If Allow Mobile App Login is on, this user will be able to log on to the mobile version of the platform after downloading to a device from the app store. If Allow Mobile App Login is off, this user can only login to a computer on the Mac or PC version of the application.

Broadcast Messaging

If Broadcast Messaging is on, this user will be permitted to send broadcast messages to groups of users. A broadcast message can be sent to multiple recipients at once, however, any replies are seen only by the original sender.

Group Messaging

If Group Messaging is on, this user will be permitted to send group messages to groups of users. A group message can be sent to multiple recipients at once and all participants in the conversation will see the replies.

ADVANCED USER SETTINGS : GEAR ICON

Each user has additional tools or settings available for the admin. These are accessible on the User page under the gear icon to the far right of the user's name.

From here the admin can reset passwords, change/update email addresses, upload avatars and jump directly to this user's message activity (see page 8) or presence activity. t Presence activity reflects the % of time the user is in various states (Online, Away, Do Not Disturb) while logged into the app.

The admin is also able to Remotely Wipe a users Qliq App data (for instance, if they lose their mobile device), revert a recent wipe, and remove users all from the gear icon.

When editing a user from the gear icon an admin can adjust their individual securities, name/department displayed, and add/remove the user from established subgroups.

Call Escalation can also be setup via the gear icon if enabled for your group. If the user is unable to receive messages from Qliq due to being in an area with no connectivity, the message will be escalated by a phone call to the recipient letting them know that there is a message waiting for them. Users can also set this up on their own directly in the app. You're able to set a specific escalation number to call and a schedule for when escalation is permitted.

ROLES

This “Coming Soon” feature will allow you to assign Roles to users so that a role can be messaged without needing to research who is covering that position at the moment. You will also be able to setup message escalation to a role supervisor and attribute scheduled times to specific Roles. More to come in the very near future, stay tuned!

ADMINS

As an admin, you can see the power of this function with the access it provides you to managing your users and groups online. You can add as many admins as needed. Please note, you should only setup one admin as the “point of contact”.

POINT OF CONTACT

When an invitation to join your group is sent it will appear to come from the admin with this designation. This is a way for the invites to bypass most SPAM filters by appearing to come from a known sender in your company.

Name	Email	Title	Group Owner	Point of Contact	IT/Server Admin	Status
John Skowlund	john@qliqsoft.com	Admin	☑	☐	☑	active
Jolean Sheffield	jolean.sheffield@qliqsoft.com	Director of Customer Success	☑	☑	☑	active

ADMIN ACTIVITY REPORTS

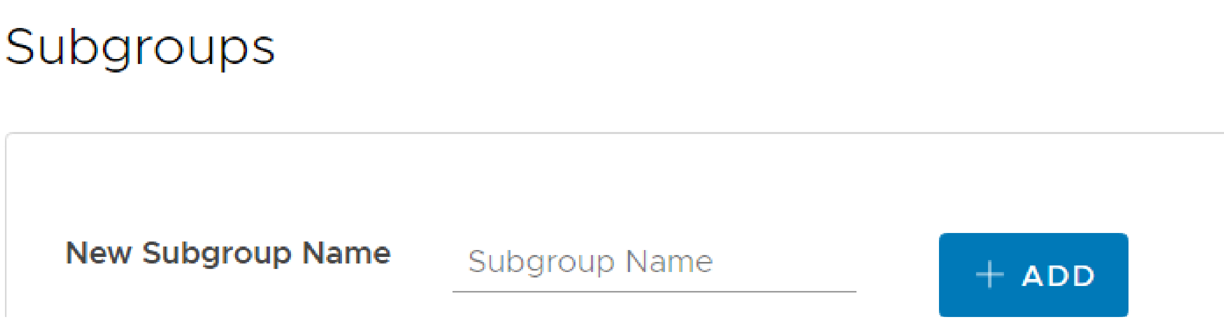
Please see "Activity Reports" above.

SUBGROUPS

Subgroups provide a forum for your users to communicate in smaller subsets of the group. These can be thought of similar to chatrooms, each with their own security and type. This can help organize users by specialty, location, or other grouping characteristic.

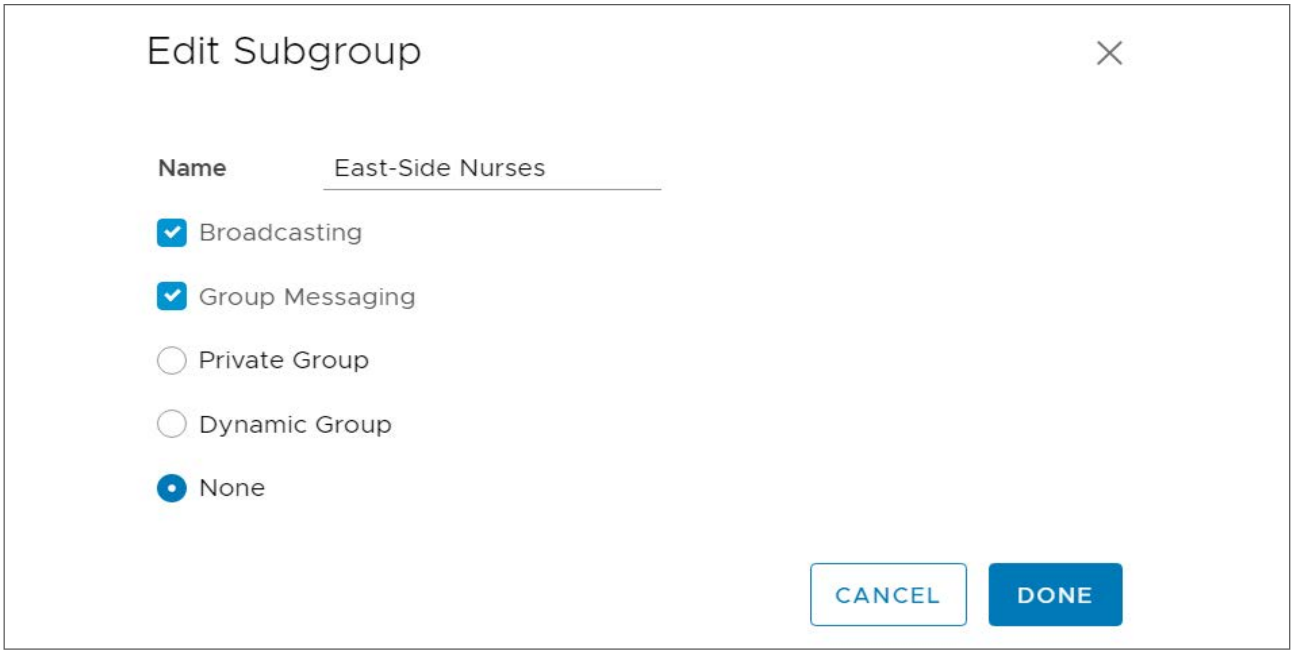
CREATING AND EDITING A SUBGROUP

To add a subgroup, enter the desired name and choose ADD.



To edit a subgroup, choose the gear icon to the far right of the subgroup name and select EDIT.

Subgroups are typically visible to all group users, but this can be modified by editing the sub-group and making it either Dynamic or Private.



DYNAMIC

Normally an administrator has to manage what users participate in which subgroup, however, dynamic groups can be joined by users on their own directly from the app. Likewise, users will be able to leave a dynamic subgroup without admin involvement.

PRIVATE

Private subgroups are visible in the app only to those users who have been added to the sub-group by an administrator.

ADDING USERS TO A SUBGROUP

When a subgroup has already been created, you can edit the participants of that subgroup by selecting the subgroup name from the list. Then, you will see a list of participants. Click Add to choose additional users from your main group list.

You can also add users to a subgroup by selecting the gear icon on the far right of the user name on the Users page and selecting Edit > Add To Subgroups.

SUBGROUP SECURITIES

Messaging

From the edit menu you can establish what message types each subgroup can receive.

No Full Group Access

Users with No Full Group Access who are placed into a subgroup will be restricted to that subgroup only. They will be able to see other Members in the subgroup but not your entire, larger group.

EXTERNAL GROUPS

If you would like to combine your contact list with the contact list of another existing Qliq customer we are able to establish an “external group link”. Because there are archive and other implications to consider it is recommended that you contact support or your account representative at Qliq to discuss.

QUICK MESSAGES

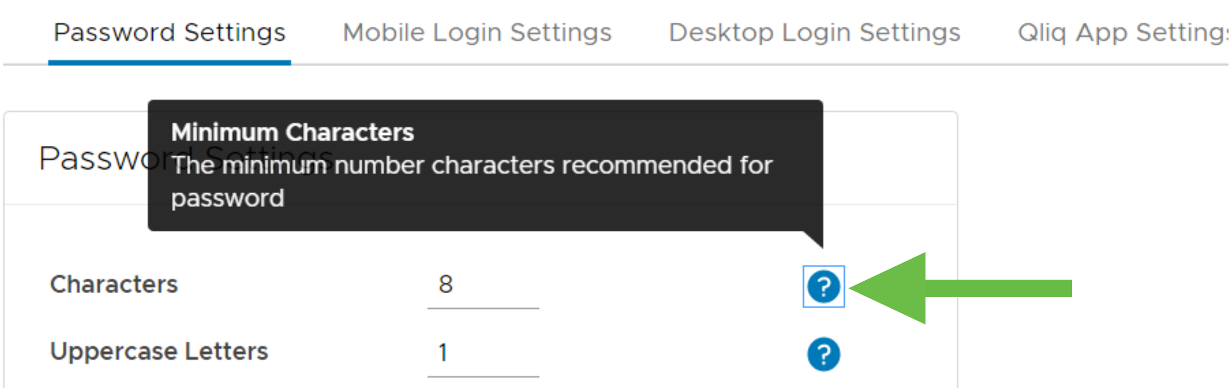
Quick messages are an easy way for users to send pre-typed messages on the fly from any conversation. Users are able to create their own Quick Messages in the app but we provide you a starting list to review and revise from the Admin Dashboard portal.

DEVICES

Every time a user accesses their account their device is registered here. This will allow you to troubleshoot issues with their application version as well as apply filters to identify the users on specific platforms. For example, you can quickly filter to see how many users you have on iOS versus Android devices.

SECURITY SETTINGS

Securities are handled at both the individual and enterprise level and are, therefore, addressed separately. Most settings are self-explanatory, but most questions can be resolved by clicking the question mark icon for more information.



ENTERPRISE SECURITIES

Security settings that impact all of your users are managed on the Security Settings page.

Password Settings

We provide industry-standard defaults to your password settings, however, these can be adjusted to meet any of your needs. Active Directory, if connected, will trump these settings.

Mobile Login and Desktop Login

These two tabs allow you to manage the user experience when logging in from a mobile app or desktop platform. You can adjust each setting to meet your needs. For example, you may feel more comfortable with an extended Inactivity time for desktop users but choose more conservative time frames for users on mobile apps.

Qliq App Settings

This tab allows you to set the app's message retention period, screenshot blocking, and more. Remember, you can hover over any question mark in the Admin Dashboard for more information.

PERSONAL INVITES

Users are able to invite their own personal contacts to join them on Qliq. This forms a 1:1 connection between your user and the person they invited. The invited user does not see your group or have any access to it. From the Personal Invites page you can see these connections, and if needed, these individuals can be converted to members or non-members from the right-side gear icon. To disable the ability for users to send personal invites please contact support or your account representative at Qliq.

MONITOR ACTIVITY

ACTIVITY REPORTS

Qliq does not store message content, and as such we cannot show you detailed reports in the Admin Dashboard - however, we provide 3 high-level Activity Reports for your review.

User Activity

This will display certain searchable user actions such as app login/logout.

Message Activity

This displays the time stamp details for each message, including who sent the message, the recipient, and when that message was created, sent, received, read, acknowledged and deleted. This is searchable by participant name and assists with basic troubleshooting.

Admin Activity

When an admin makes any change to your group/users, those actions are logged in your Admin Activity tab. This is useful for groups with multiple admins.

For detailed message reporting, including access to message content - an archive must be set up behind your organization's firewalls. We provide a free tool, the QliqSTOR, to facilitate this for customers wishing to establish an archive and utilize more reporting. Please see page 12 "QliqSTOR" for more information.

SERVICE LOGS

Service logs allow you to monitor the success of certain user actions such as logging in and out of the application.

REPORTED ISSUES

Reported Issues allow you to monitor requests to our support team that are opened by your users via the application.

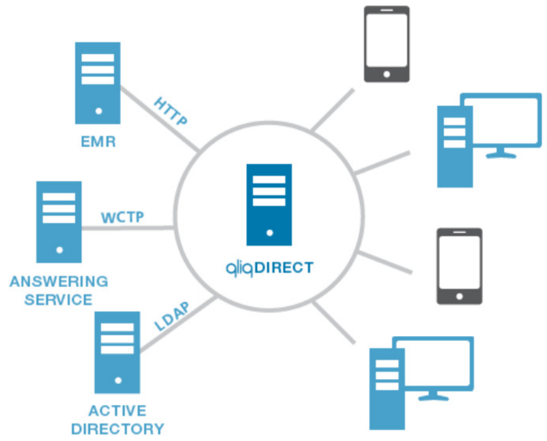
MANAGE FEATURES

QLIQSTOR

The QliqSTOR is a free archival application that we provide to customers who wish to store message content on their servers. Please refer to the QliqSTOR Admin Guide for specifications and installation instructions.

QLIQDIRECT

We provide an easy tool to connect your Active Directory to Qliq for easy user management. QliqDIRECT is downloaded from the QliqDIRECT page. Please refer to the QliqDIRECT Admin Guide for more information.



CLOUD MESSAGING API

We are able to integrate Qliq into various other applications, tools, and devices. For more information on a Cloud Messaging API project we recommend reaching out to support or your Qliq Account Representative. You can also review helpful information in our API Integration Guide.

ONCALL SCHEDULING

This add-on feature allows customers to establish on call schedules which can be viewed by members from within the application. From there, members can reach the appropriate on call staff member and initiate a secure message. On Call Schedules are created and maintained in the Admin Dashboard. For more information please review the On Call Scheduling Admin Guide and reach out to us if you would like to incorporate this feature.

QLIQ ASSISTED CALLS

From the Qliq app, you are able to select any phone number and call from the application one of two ways:

DIRECT CALL

This option passes the user to their native phone dialing screen and allows them to place a direct call. This will expose their personal caller ID information to the person they call.

QLIQ ASSISTED CALLING

With this add-on feature enabled, users will be able to select this option and a bridged call will be established between them and the number they are calling. This will cloak their personal Caller ID and, instead, displays the caller ID setup in the Admin Dashboard. This provides privacy for your members and presents a central point of contact for return calls.

To enable this feature, simply contact support or your Qliq Account Representative. This feature entails an extremely minimal annual fee.

CARE CHANNELS

Care channels are a unique approach to managing the patient conversation throughout the continuum of care. To learn more about Care Channels, check out this video and reach out to support or your Qliq Account Representative for more information. When enabled for your group you will manage this feature from the Admin Dashboard.

SNAP & SIGN

Snap & Sign is our answer to document capture, signature requests, and the ability to share documentation/media with other Qliq Users. This add-on feature must be enabled for your group with purchase. To learn more information watch this video and if interested, reach out to support or your Qliq Account Representative for more information.

VISIT PATH

This “Coming Soon” feature will allow users to check-in at various locations, record work activity, and share GPS information. Admins will be able to monitor the location of staff from a special viewer in the admin dashboard. This supports remote workers and resource managers. More to come in the very near future, stay tuned!

THANK YOU!

We appreciate the opportunity to serve your organization and look forward to helping you make the most use of our solutions. As always, please contact support if you have any questions or enhancement requests! support@qliqsoft.com.