selerix engage

User Guide

2022 REVISED EDITION

Get the most out of Selerix Engage
with our new and improved user guide

Selerix Systems, Inc.
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selerix

2022 User Guide Revised Edition

Thank you for choosing Selerix Engage to enhance your workforce communication and engagement needs. Based on our experience and industry reputation, Selerix is confident this communication tool can increase the effectiveness of your employee communications while streamlining the resources and effort required to achieve your engagement goals.

Designed with communications professionals in mind, this innovative tool arms you with the ability to revolutionize the way you communicate with employees.

INTUTITVE AUDIENCE TARGETING

- Easily define your target audiences
- Leverage hundreds of data points

MEASURABLE OUTCOMES

- Intuitive goal setting process
- Campaign performance
- Open (Click) rates
- Survey results
- Quiz results

DYNAMIC MESSAGING

- Scheduled & event-driven communication
- SMS, emails & push notifications
- Ask HR: 2-way communication
- Surveys/Quizzes

Welcome to our 2022 Revised Edition User Guide

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Section 1: Getting Started

ACCESSING SELERIX ENGAGE

FIRST LOGIN

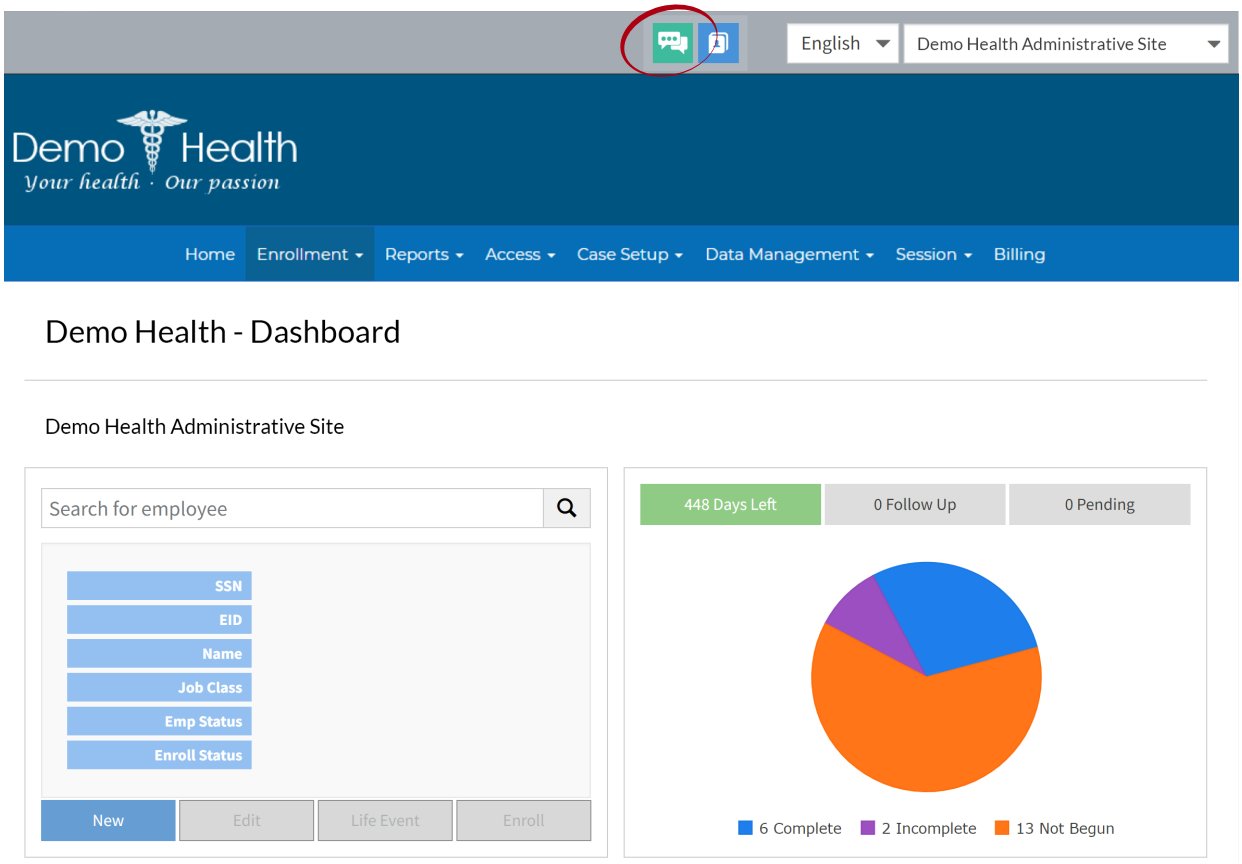
GROUP SETTINGS

Section 1: Getting Started

ACCESSING SELERIX ENGAGE

Access Selerix Engage by logging in to the BenSelect admin site dashboard. BenSelect users will use their current credentials. New users will need to be provided credentials via their case administrators authorized to grant access.

Click the Selerix Engage icon at the upper right corner of the screen.

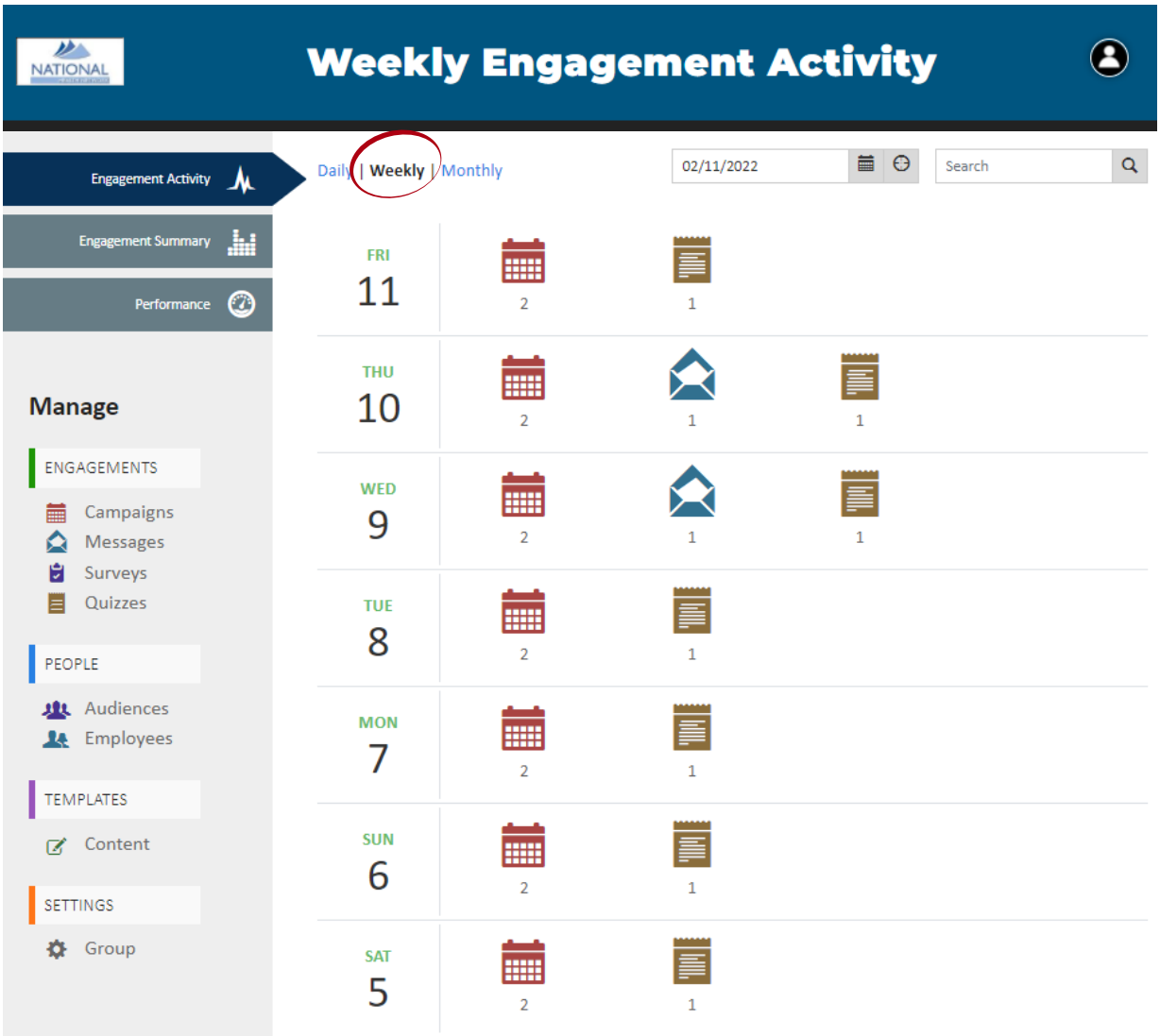


Section 1:
Getting Started

FIRST LOGIN

Once you have logged in, the Engage home screen will open. Your default home screen is the weekly view of the first tab labled "Engagement Activity."

This tab also allows you to view your engagement activity with both a daily and monthly snapshot, but we will cover all of these more in another section.

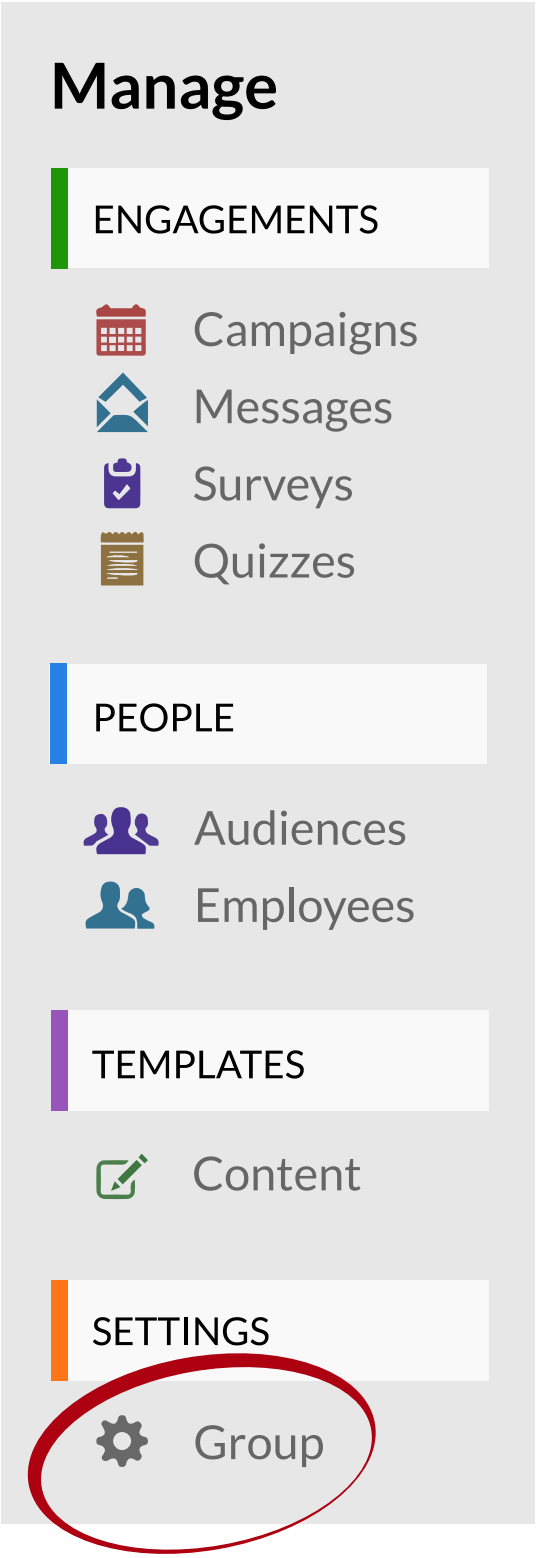


Section 1: Getting Started

GROUP SETTINGS

Before diving into creating any messaging and content, it is important to first ensure your global settings are set appropriately.

View and adjust group settings for your case by clicking on the Group link under Settings on the left-hand side of the page.

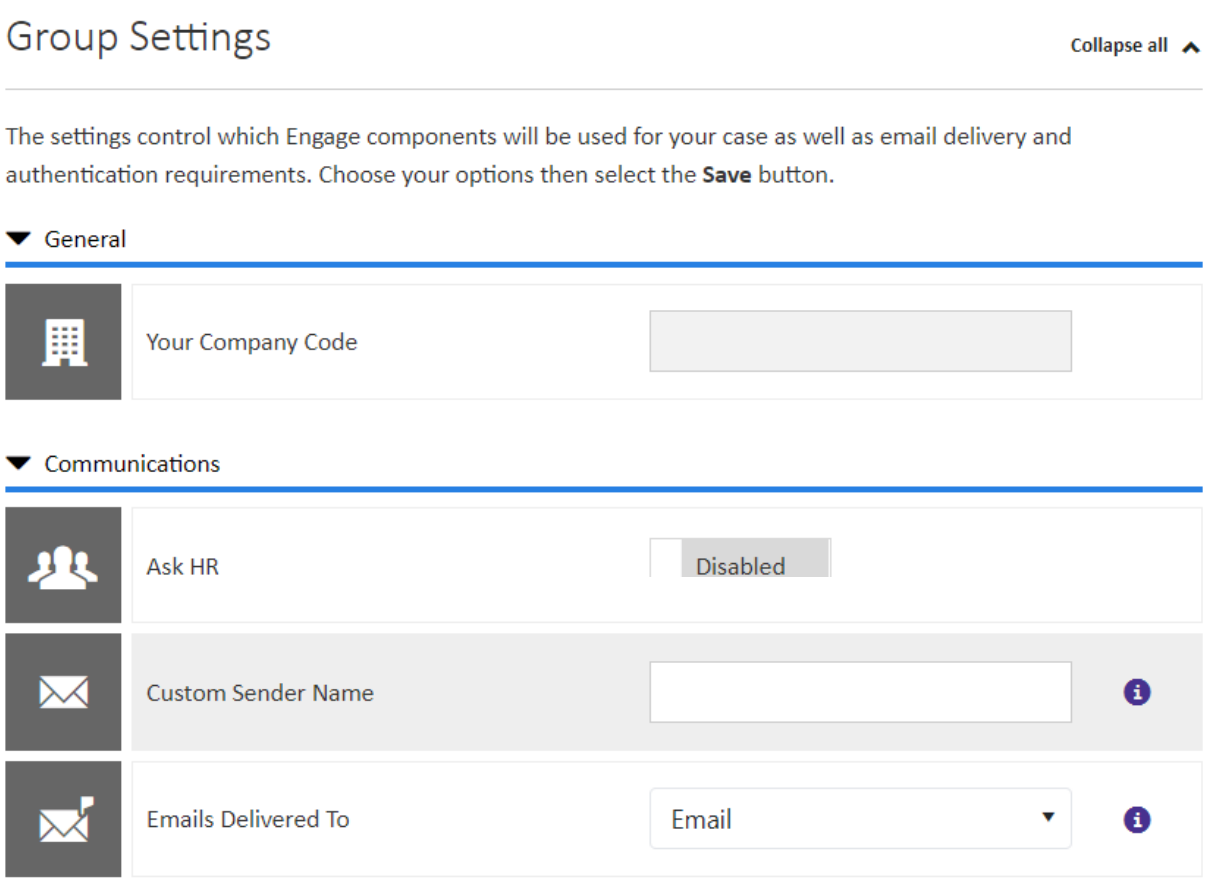


Section 1:
Getting Started

GROUP SETTINGS CONT.

What you will see and can change:

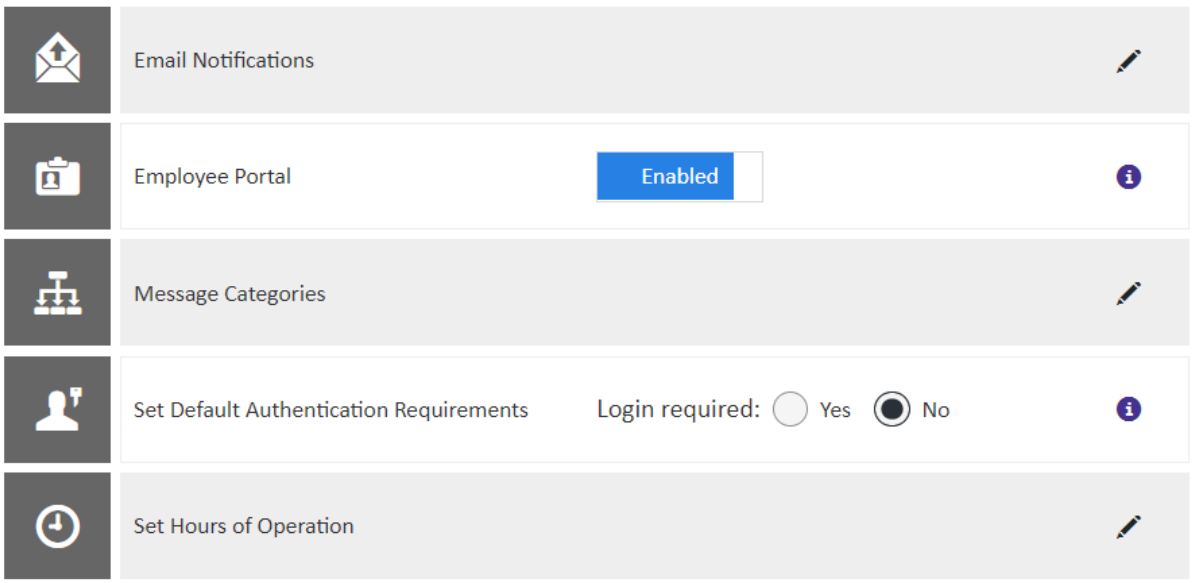
1. Your Company Code – this code is unique to your case. It is provided to employees who are having trouble logging into the Selerix Engage employee portal.
2. Ask HR – this toggle will enable the optional Ask HR feature for use by employees in the Selerix Engage employee portal.
3. Custom Sender Name – customize emails to make them more recognizable to recipients. Do not use the "@" or "." symbols.
4. Emails Delivered to – set the email address for delivery of emails – primary, personal or both.



Section 1: Getting Started

GROUP SETTINGS CONT.

5. Email Notifications – designate the administrative users who will receive email notifications generated by Selerix Engage.
6. Employee Portal – enable the optional Selerix Engage employee portal.
7. Message Categories – create and manage categories for your engagements. You have the option of making them optional or required for employees.
8. Set Default Authentication Requirements – set default setting for employee log in requirements. Note: if the employee portal is not enabled, set to "no."
9. Set Hours of Operation – indicate hours of operation. Engagements scheduled to deploy outside of hours of operation will be put "on hold" until the following day.



Section 2: Performance Metrics

ENGAGEMENT ACTIVITY PAGE

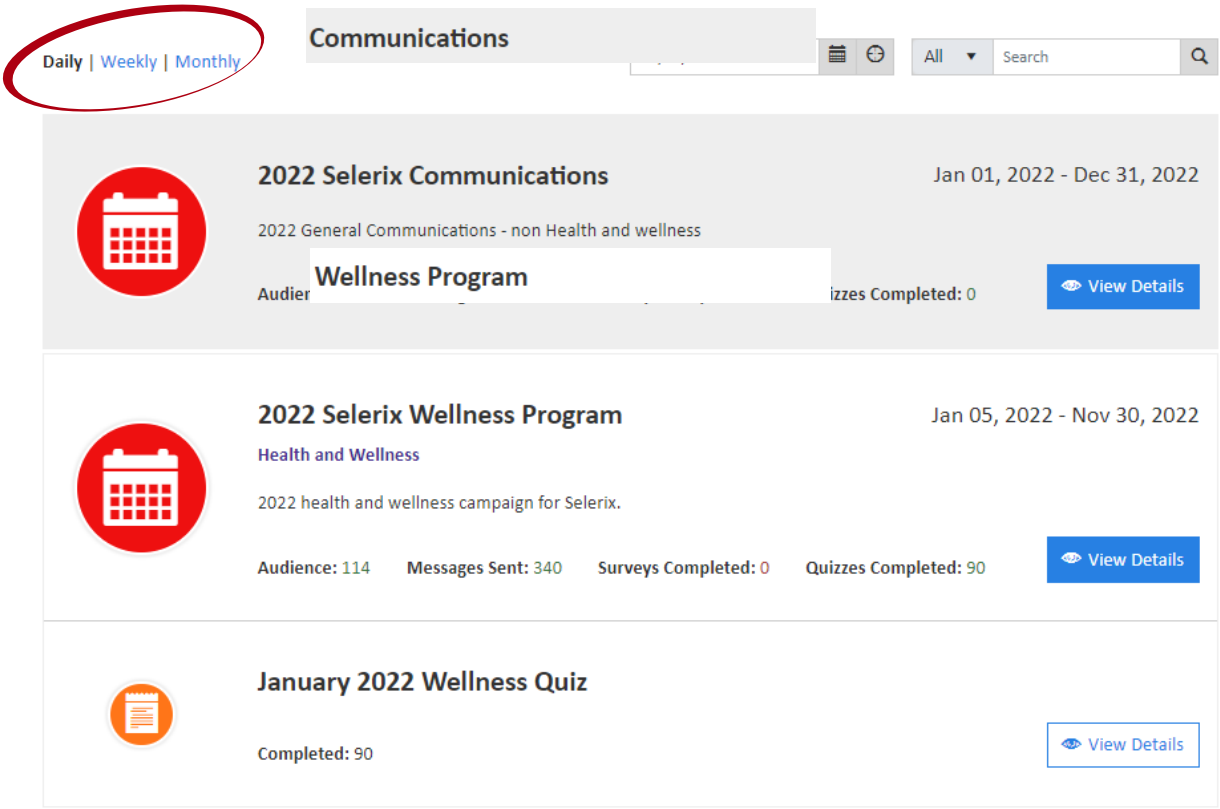
PERFORMANCE PAGE

ENGAGEMENT SUMMARY PAGE

Section 2: Performance Metrics

ENGAGEMENT ACTIVITY PAGE

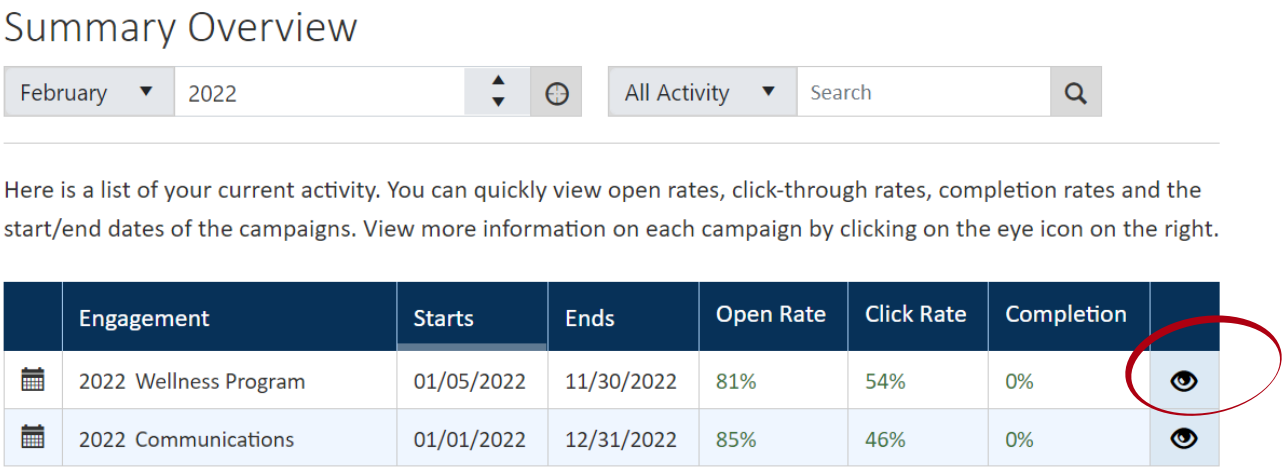
1. You will see the Weekly view on the Engagement Activity page upon first log in.
2. The Engagement Activity page displays what has deployed or is scheduled to deploy in three views – Daily, Weekly or Monthly.
3. You can view details of each deployment by clicking on the View Details button (daily view), the eyeball icon in the far-right column of the engagement (weekly view), or the engagement (monthly view). Details will show employees who were sent messages and their open or click status. Message failures are also shown along with the reason for the failure.
4. For surveys and quizzes, a list of recipients who completed their survey or quiz will also be shown.



Section 2:
Performance Metrics

ENGAGEMENT SUMMARY PAGE

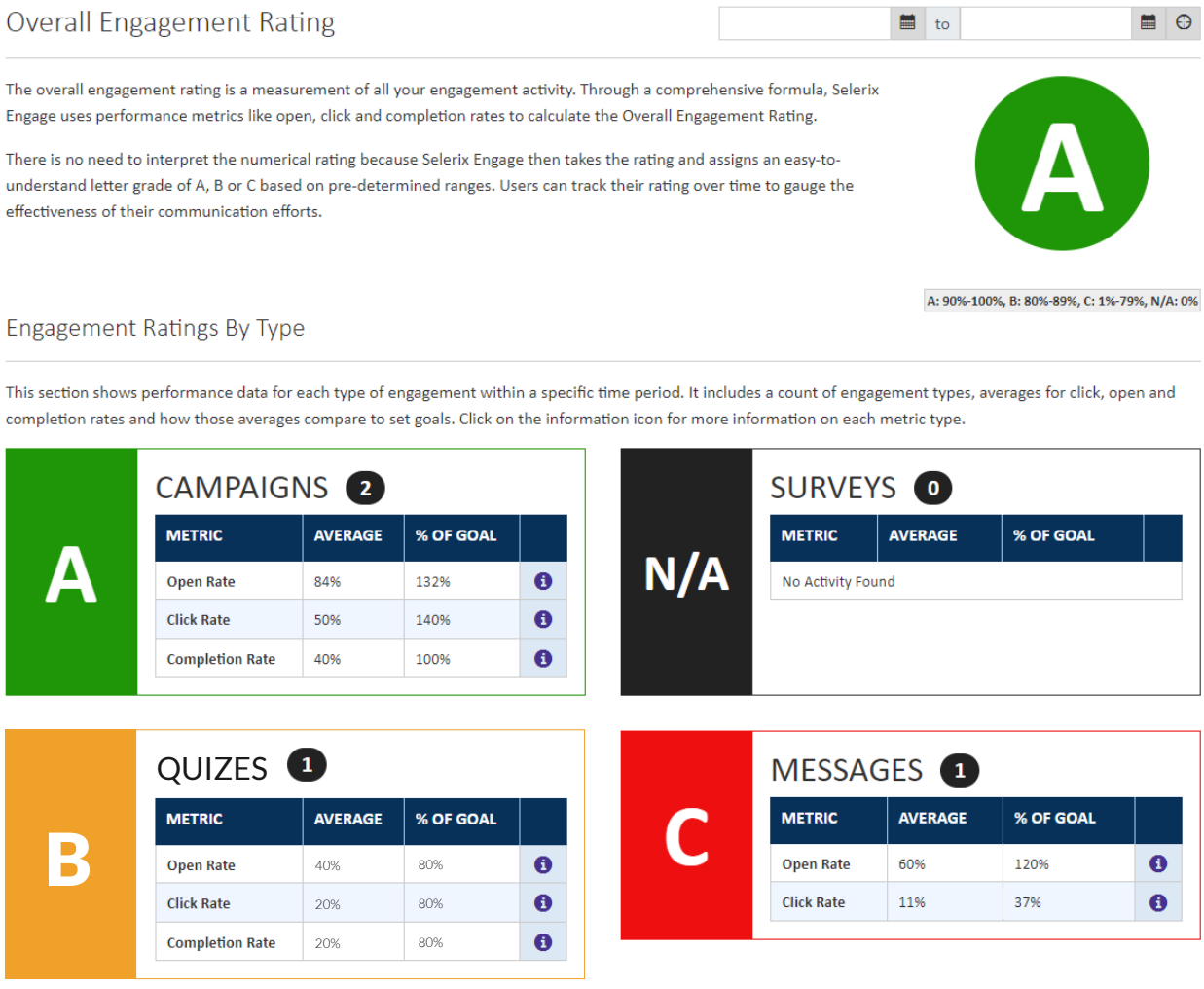
1. Provides high level metrics on engagement activity.
2. Search by month, year, engagement type or keyword.
3. View details of the engagement by clicking on the eyeball icon in the far-right column.



Section 2: Performance Metrics

PERFORMANCE PAGE

1. The Performance Page provides detailed metrics on all your deployed engagements. Engagements are assigned a letter grade of A, B or C based on a mathematical formula that compares the goals you set with actual open, click and completion rates.
2. The page is divided into three sections:
   - Overall Engagement Rating – a rating for ALL deployed engagements
   - Engagement Ratings by Type – a rating assigned by deployed engagement type
   - Performance Breakdown – a rating for EACH deployed engagement



Section 3: Creating Content

CREATING A CAMPAIGN

CREATING A MESSAGE

CREATING A SURVEY

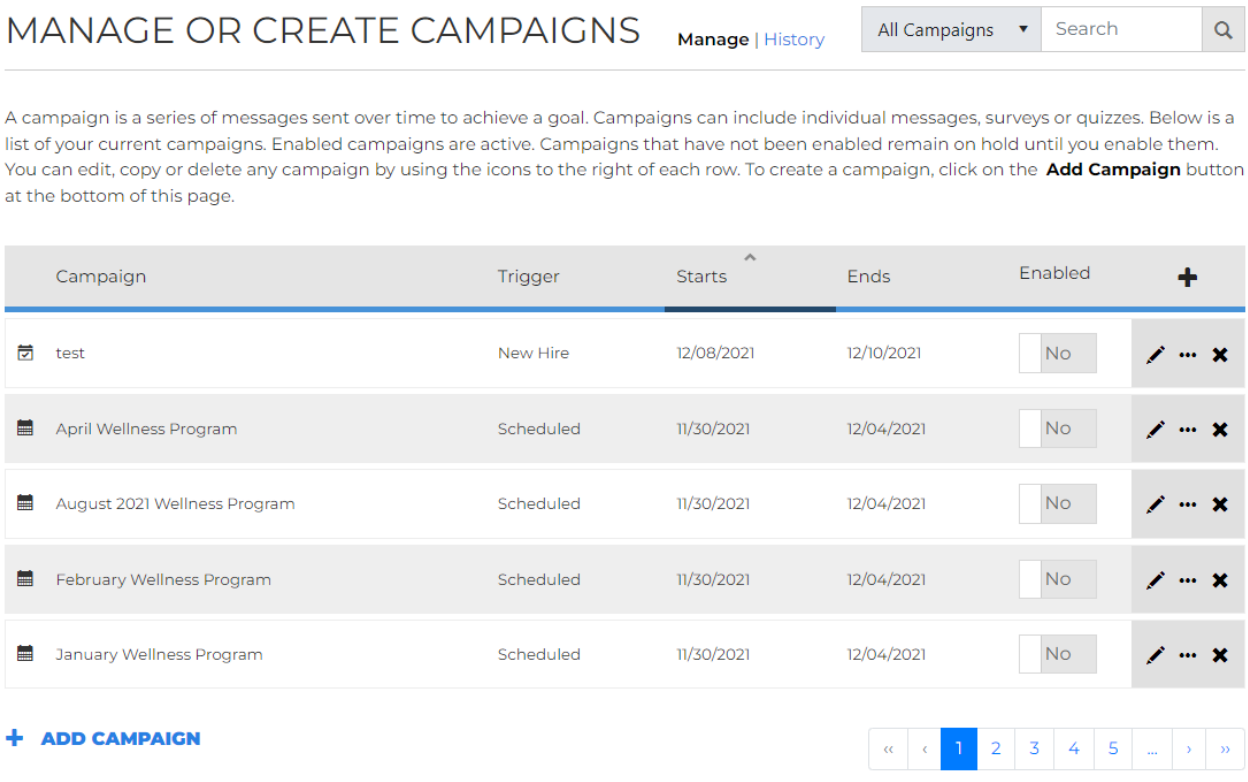
CREATING A QUIZ

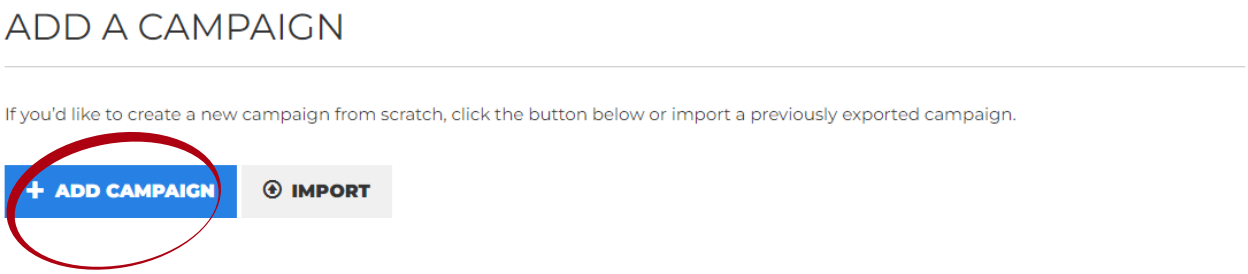
CREATING A CONTENT PAGE

Section 3: Creating Content

CREATING A CAMPAIGN

1. Create engagements via the Manage section.
2. Begin by clicking + Add Campaign, Copy an existing campaign, or import a campaign.
3. Give the campaign a title and indicate if it is scheduled or event driven.
4. Add an audience by clicking + AUDIENCE (see Build Audience section) or toggling the All Active Employees button to On. You can create a new audience or choose an existing global audience by clicking on the + AUDIENCE button.

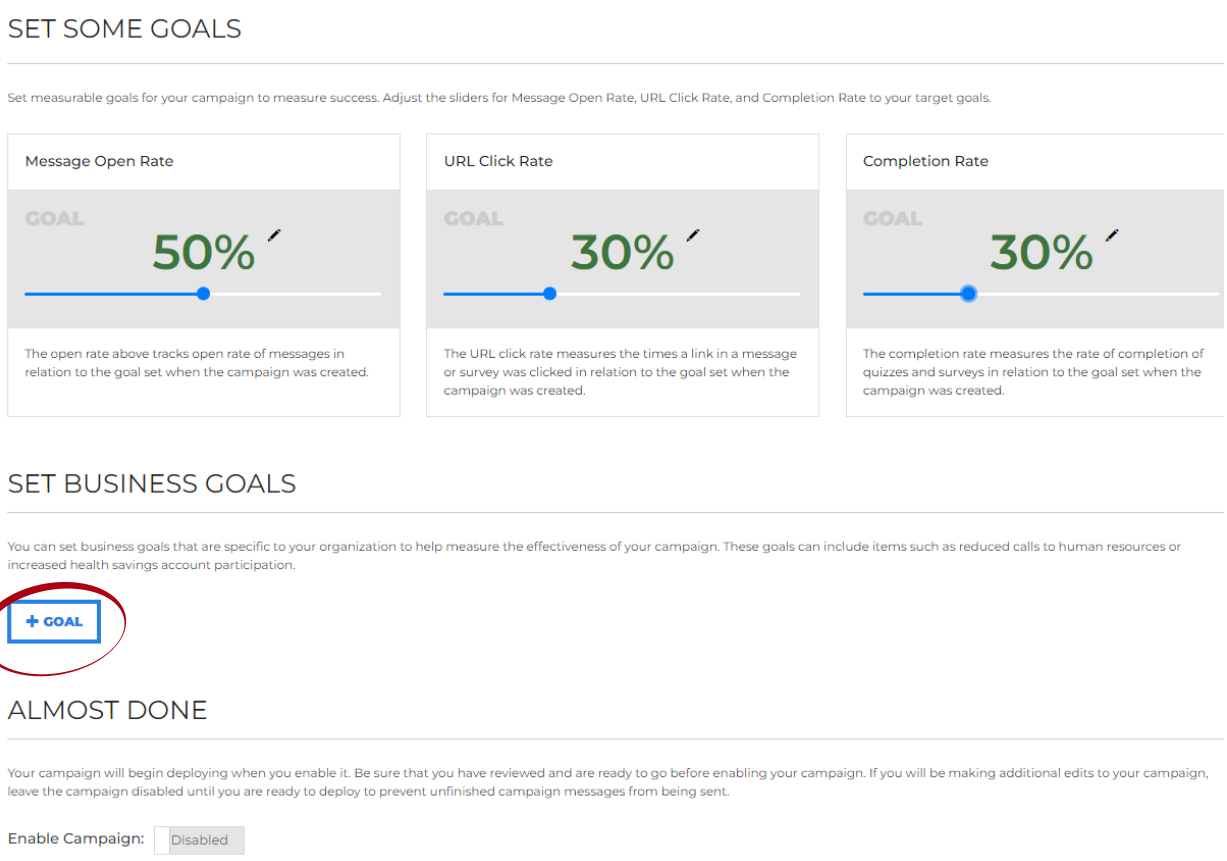




Section 3:
Creating Content

CREATING A CAMPAIGN

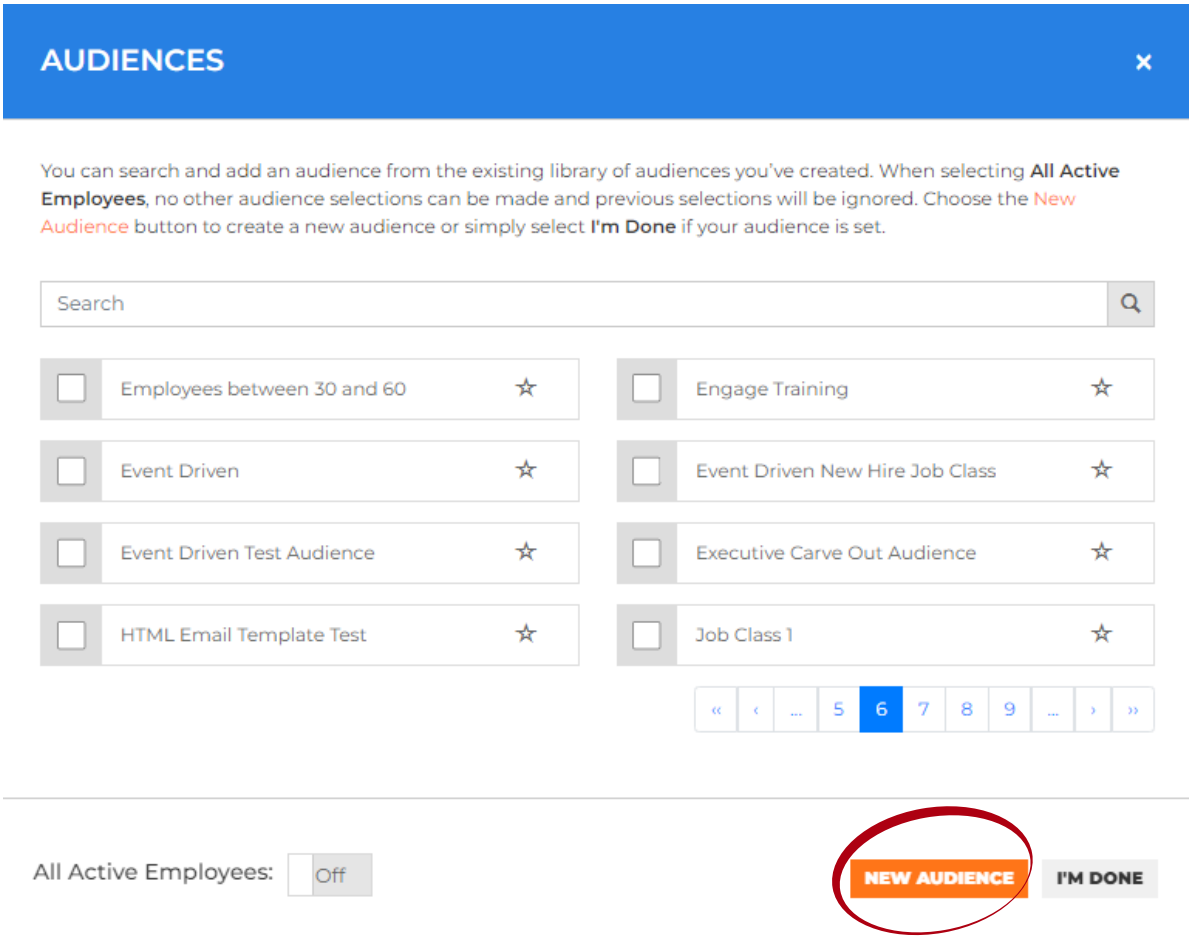
5. Optional: Add survey by clicking + SURVEY (see Creating Survey section).
6. Optional: Add quiz by clicking + QUIZ (see Creating Quiz section).
7. Optional: Add message by clicking + MESSAGE (see Creating Message section).
8. Add goals by using the slider or clicking on the pencil icon.
9. Optional: Add business goals by clicking + GOAL. It is highly recommended that goals be added to generate accurate performance metrics.
10. Toggle Enable Campaign to Enabled if the campaign is ready to deploy. Save the campaign as Disabled to make additional changes.



Section 3: Creating Content

CREATING A MESSAGE

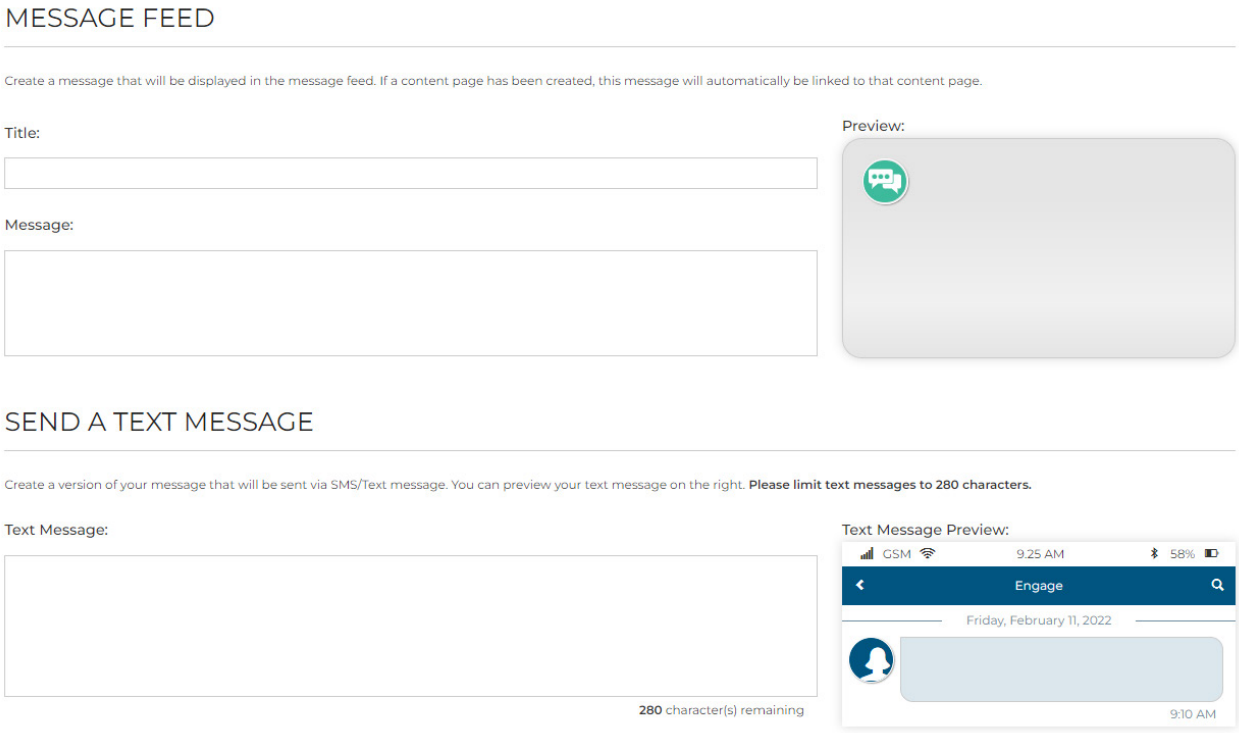
1. Begin creating a message by clicking on Messages under the Manage menu on the left side of your screen.
2. Click + Add Message, copy an existing campaign, or import a campaign.
3. Give the message a title and indicate if it is scheduled or event-driven.
4. Enter the delivery date, time and description.
5. Add an audience by clicking + AUDIENCE (see Build Audience section) or toggling the All Active Employees button to On. You can create a new audience or choose an existing global audience by clicking on the + AUDIENCE button.
6. Optional: Add content page by toggling the switch to Yes (see Creating a Content Page).



Section 3:
Creating Content

CREATING A MESSAGE, CONT.

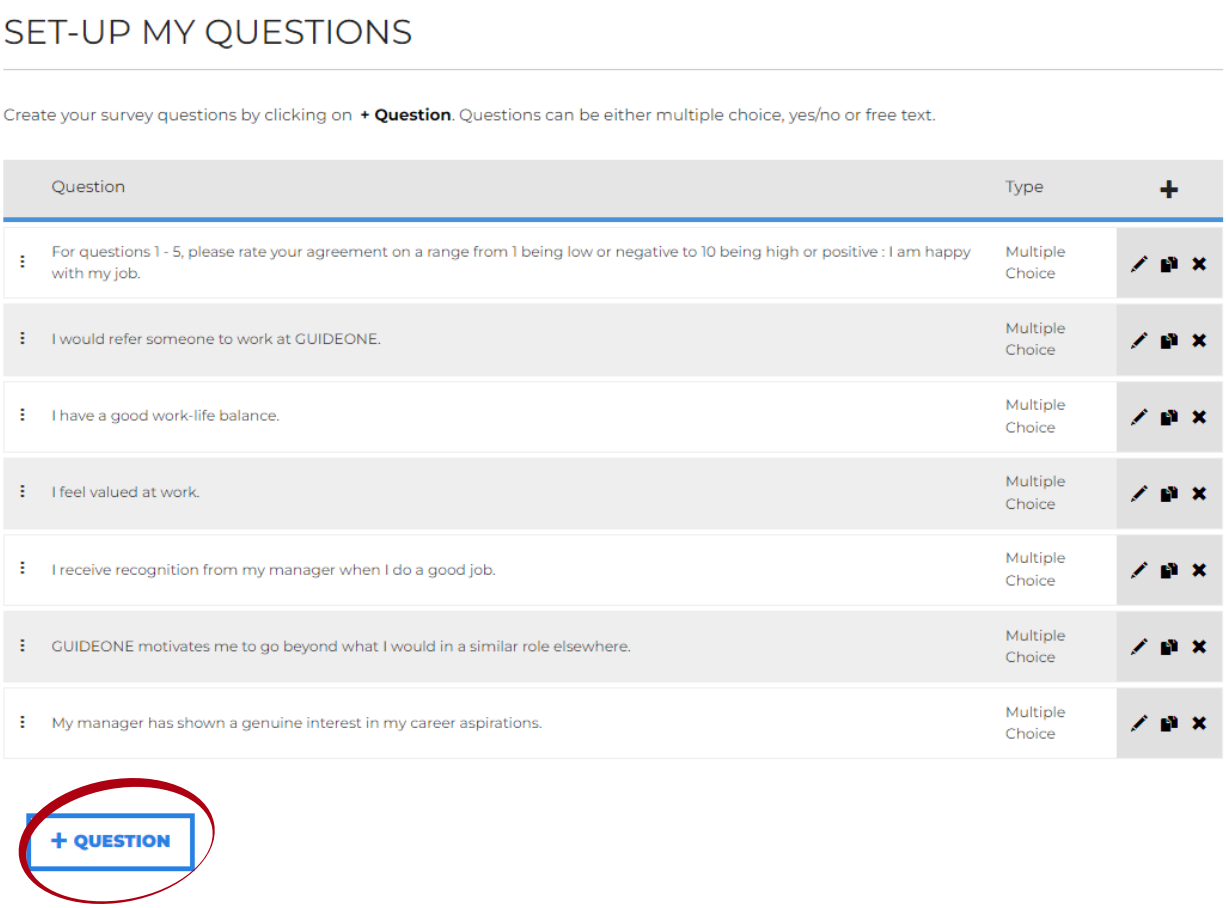
7. Create the message for the Message feed on the employee portal – desktop or mobile browser and mobile app. This step can be skipped if you are not using the employee portal.
8. Create the SMS text message. If you created a content page, a link will be included. This step can be skipped if you are not using the texting function.
9. Create the email version of your message. You can copy/paste content or HTML code to create your email.
10. Optional: Schedule a reminder email for those recipients who have not opened the email or clicked on a link.
11. Add goals by using the slider or clicking on the pencil icon. It is highly recommended that goals be added to generate accurate performance metrics.
12. If your message is ready to deploy, toggle Enable Campaign to Enabled. If further work is needed, save the message as Disabled.



Section 3: Creating Content

CREATING A SURVEY

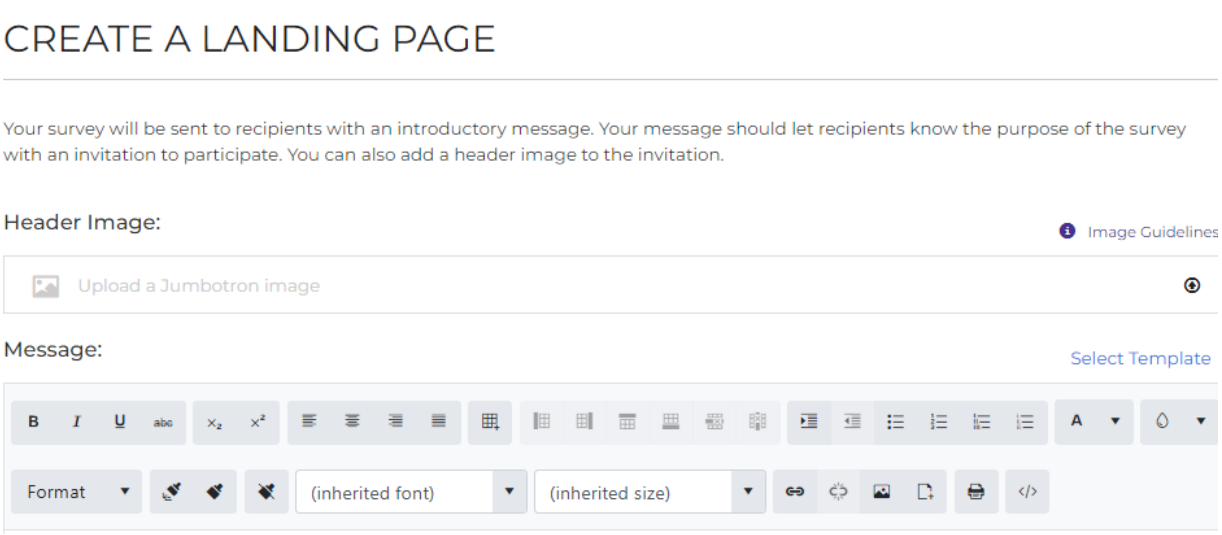
1. Begin creating a survey by clicking on Surveys under the Manage menu on the left side of your screen.
2. Click + Add Survey, copy an existing survey, or import a survey.
3. Give the survey a title and indicate if it is scheduled or event-driven.
4. Enter the start and end date for your survey, indicate if it will be anonymous and enter a description.
5. Add an audience by clicking + AUDIENCE (see Build Audience slide) or toggling the All Active Employees button to On. You can create a new audience or choose an existing global audience by clicking on the + AUDIENCE button.
6. Begin adding questions by clicking on + Question. You will be asked to indicate the type of question – yes/no, multiple choice or free text. Add the answer choices, if appropriate.

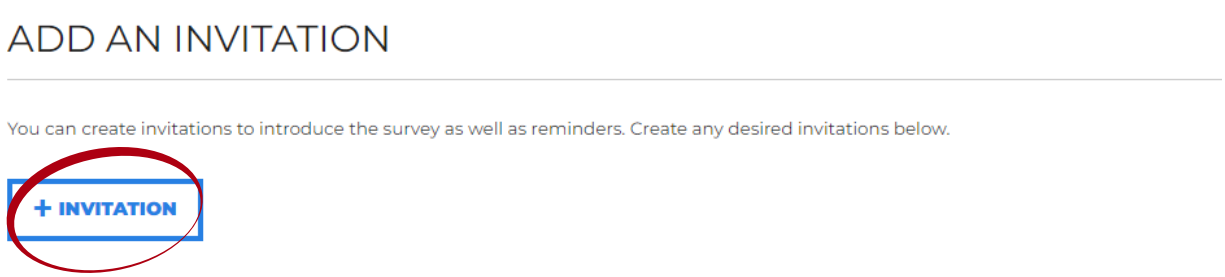


Section 3:
Creating Content

CREATING A SURVEY

7. Create the landing page for your survey. The landing page will include the button to begin answering the survey.
8. Create the invitation message. The invitation will let recipients know that there is a survey available. The survey will NOT deploy without the invitation message. Click + Invitation to create the invitation. The invitation can include a push notification, SMS text and email message.
9. Optional: Create a thank you page thanking the recipient for answering the survey.
10. Add goals by using the slider or clicking on the pencil icon. It is highly recommended that goals be added to generate accurate performance metrics.
11. If your survey is ready to deploy, toggle Enable Survey to Enable. If further work is needed, save the survey as Disabled.

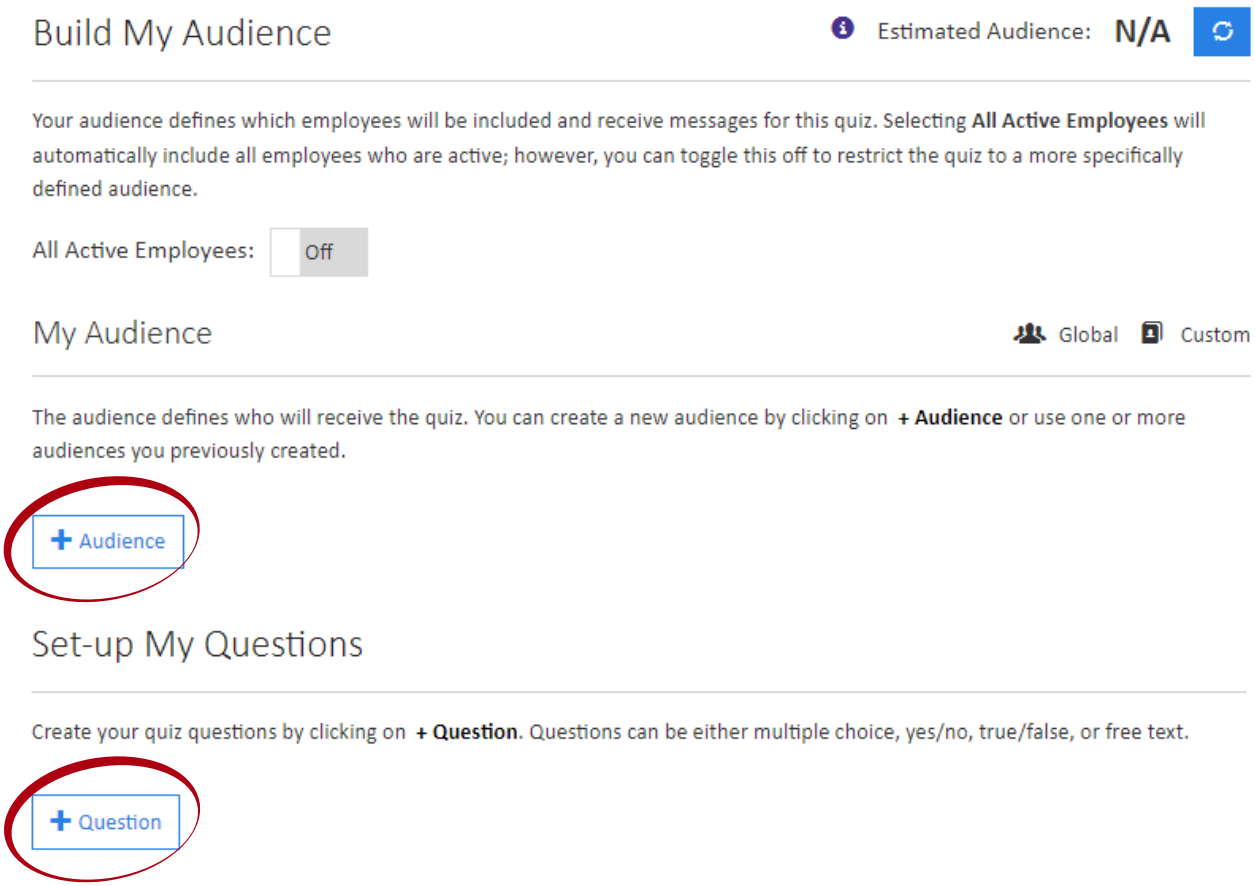




Section 3: Creating Content

CREATING A QUIZ

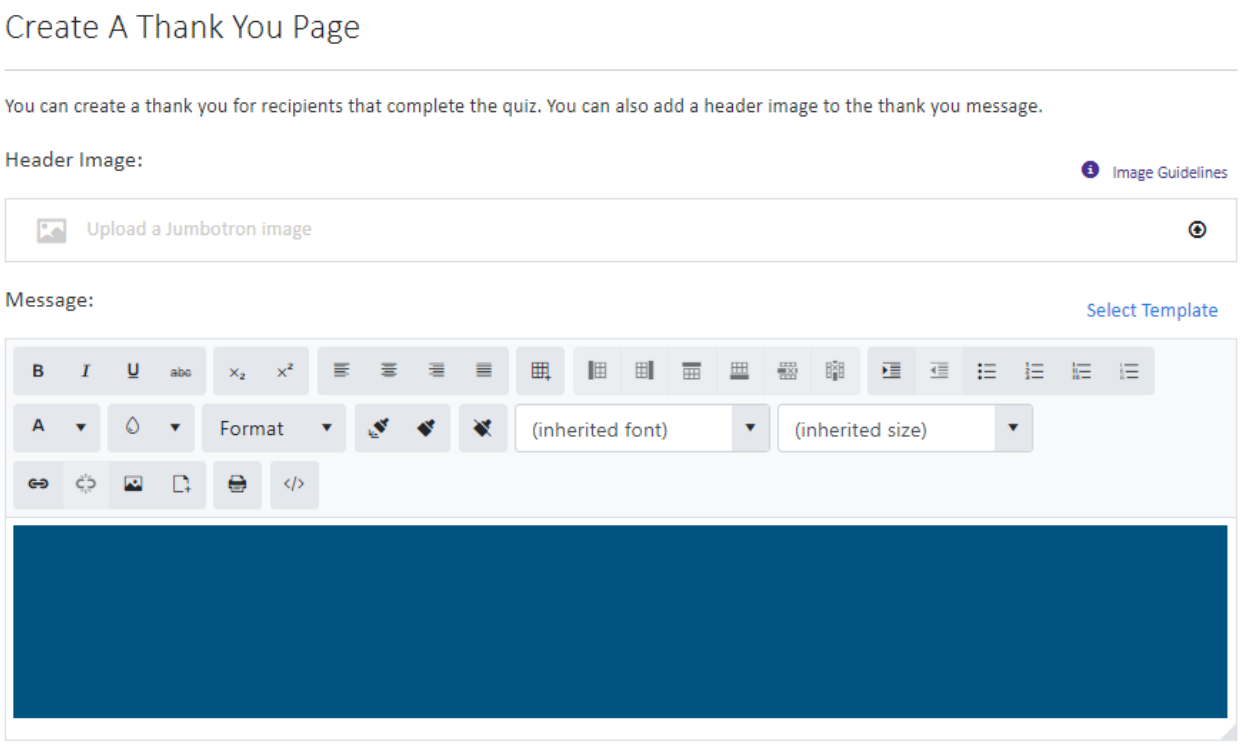
1. Begin creating a quiz by clicking on Quizzes under the Manage menu on the left side of your screen.
2. Click + Add Quiz, copy an existing survey, or import a Quiz.
3. Give the quiz a title and indicate if it is scheduled or event-driven.
4. Enter the start and end date for your quiz and enter a description.
5. Add an audience by clicking + AUDIENCE (see Build Audience slide) or toggling the All Active Employees button to On. You can create a new audience or choose an existing global audience by clicking on the + AUDIENCE button.
6. Begin adding questions by clicking on + Question. You will be asked to indicate the type of question – yes/no, multiple choice, true/false or free text. Add the answer choices and indicate the correct answer by clicking on the corresponding check mark. It will turn green.



Section 3:
Creating Content

CREATING A QUIZ

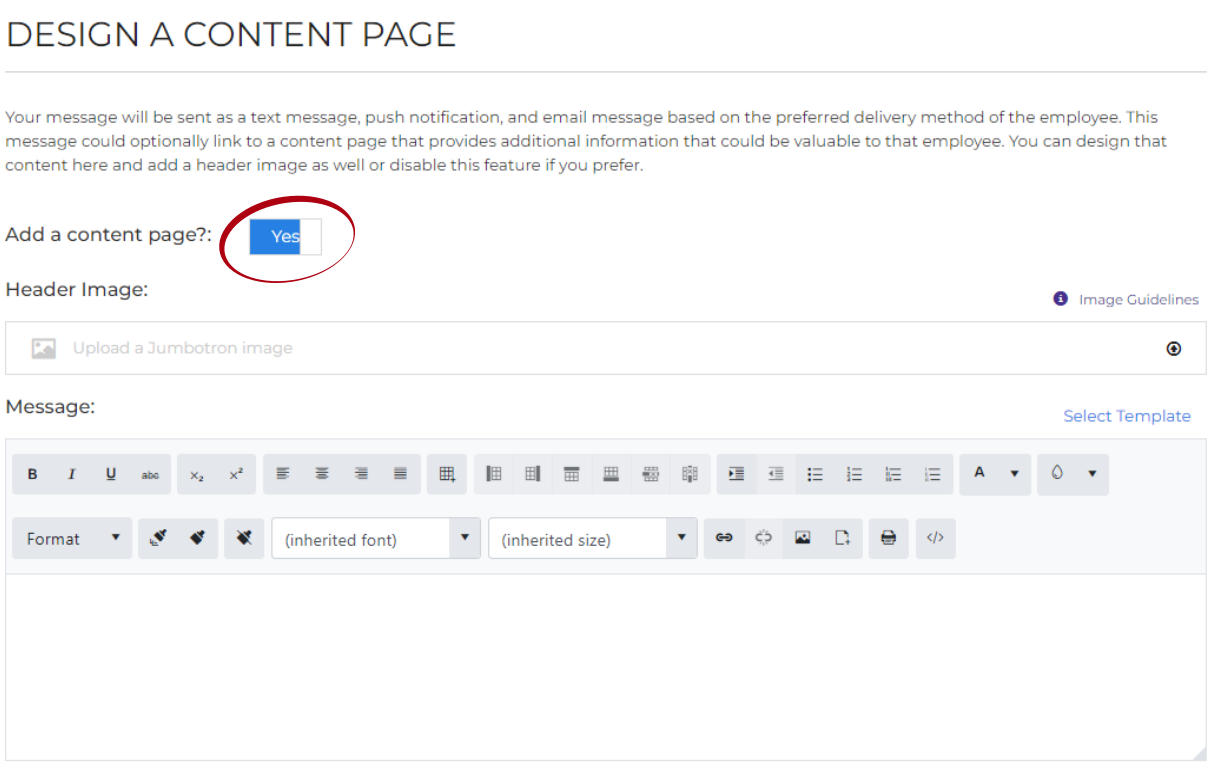
7. Create the landing page for your quiz. The landing page will include the button to begin answering the quiz
8. Create the invitation message. The invitation will let recipients know that there is a quiz available. The survey will NOT deploy without the invitation message. Click + Invitation to create the invitation. The invitation can include a push notification, SMS text and email message.
9. Optional: Create a thank you page thanking the recipient for taking the quiz.
10. Add goals by using the slider or clicking on the pencil icon. It is highly recommended that goals be added to generate accurate performance metrics.
11. If your survey is ready to deploy, toggle Enable Quiz to enable. If further work is needed, save the survey as Disabled.



Section 3: Creating Content

CREATING A CONTENT PAGE

Optional: Create a content page by toggling the switch to Yes. Content pages are meant to house additional information that may not fit with the message feed, SMS text message or email communication. Messages in the employee portal will be linked to the content page. A link to the content page will automatically be included in SMS text and email messages. You can create content directly in the window or you can copy/paste content or HTML code.



Section 4: Manage Content Settings

CREATING GLOBAL AUDIENCES

MANAGING EMPLOYEE DATA

CREATING TEMPLATES

MANAGING USER PROFILE

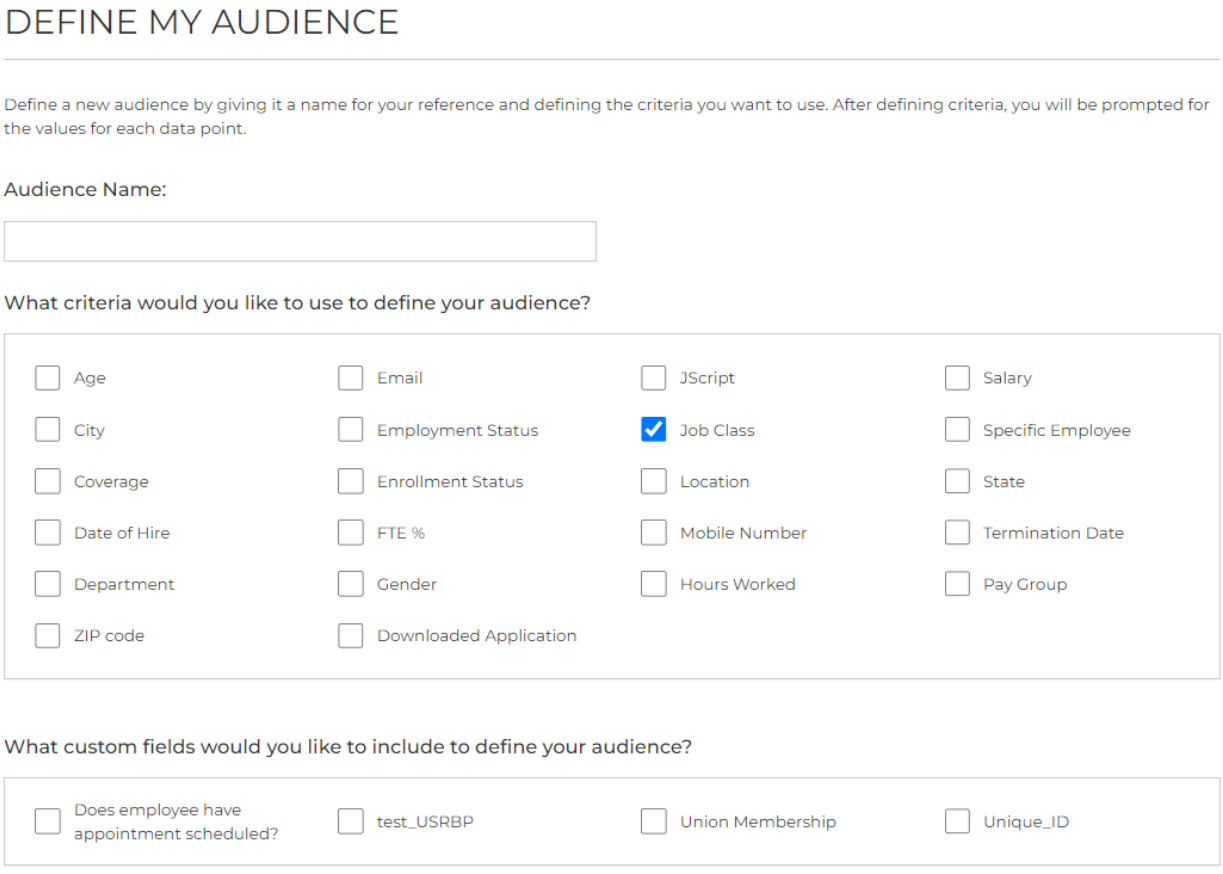
CREATING AN UNSUBSCRIBE LINK

SELERIX ENGAGE CHECKLIST

Section 4:
Manage Content Settings

CREATING GLOBAL AUDIENCES

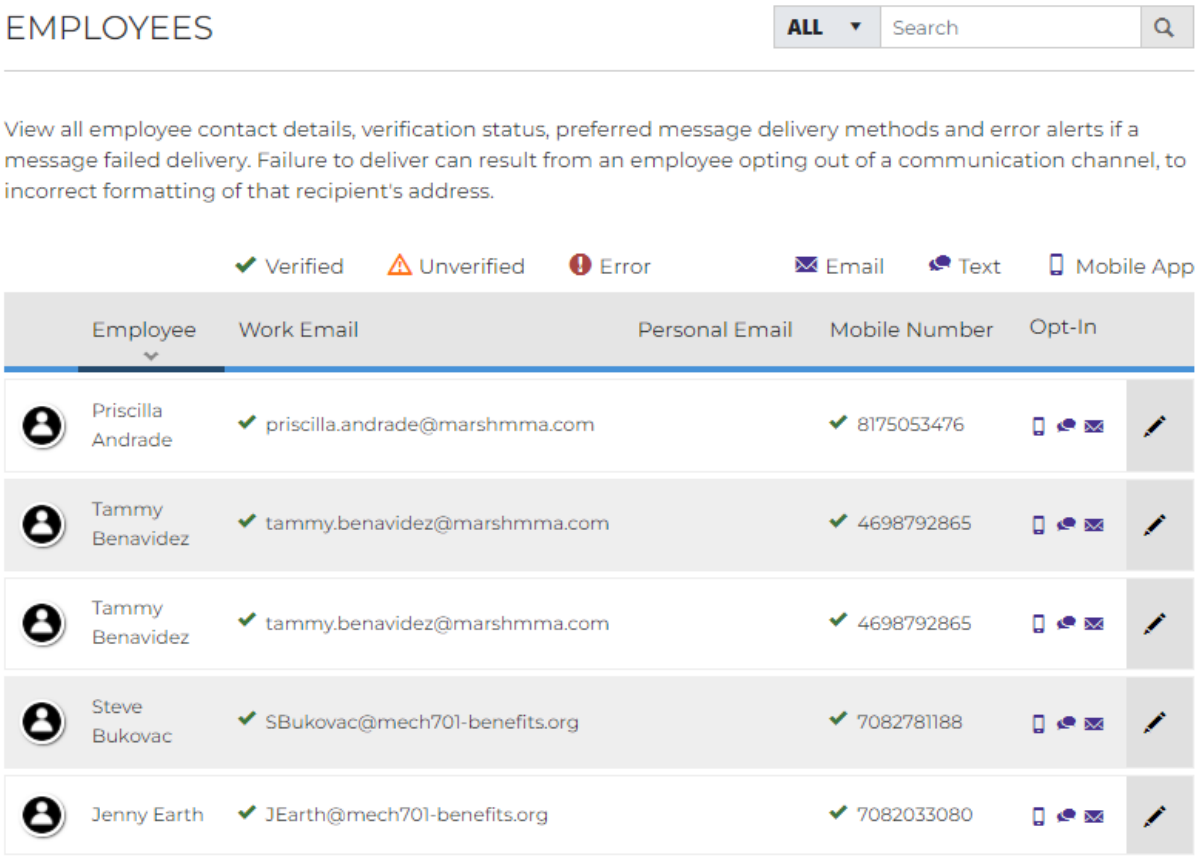
1. Create global audiences by clicking on Audiences under the People section on the left-hand side of the page.
2. Click on + ADD AUDIENCE.
3. Give the audience a name and select the criteria you will use to define the audience. Click Next.
4. Select the specifications for the criteria you selected and click on Save when finished.
5. The audience will be available for use with any engagement you create regardless of type.



Section 4:
Manage Content Settings

MANAGING EMPLOYEE DATA

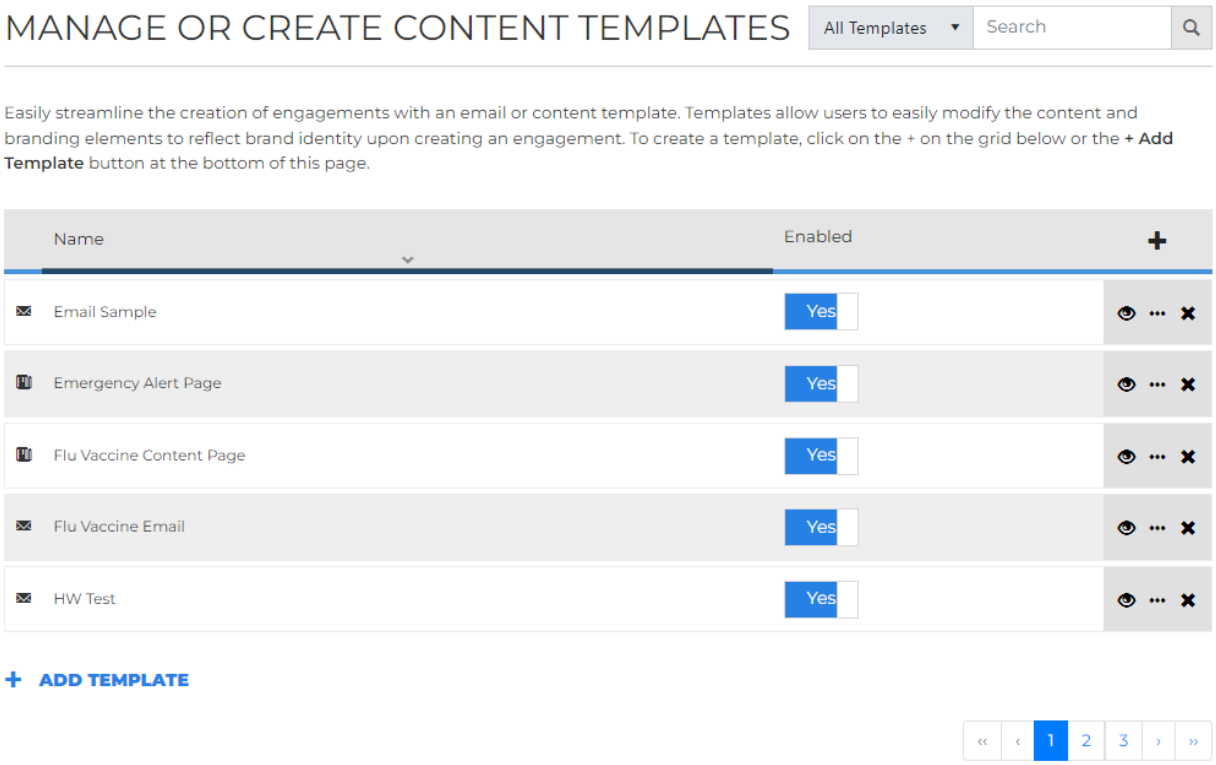
Add, edit or delete contact information for employees by clicking on Employees under the People section on the left-had side of the page.

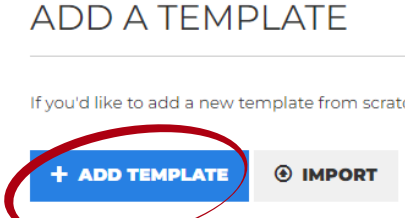


Section 4: Manage Content Settings

CREATING TEMPLATES

1. Create content page and email templates that can be available for use in all your engagements for the case. These can be copied and can be exported to other cases.
2. Click on the Content link under Templates on the left-hand side of the page.
3. Click on + ADD TEMPLATE to begin creating a template.
4. Give the template a name and indicate if it will be content page or email.
5. Create your template by using the tools in the editor or using HTML code.
6. Enable the template and click Save.

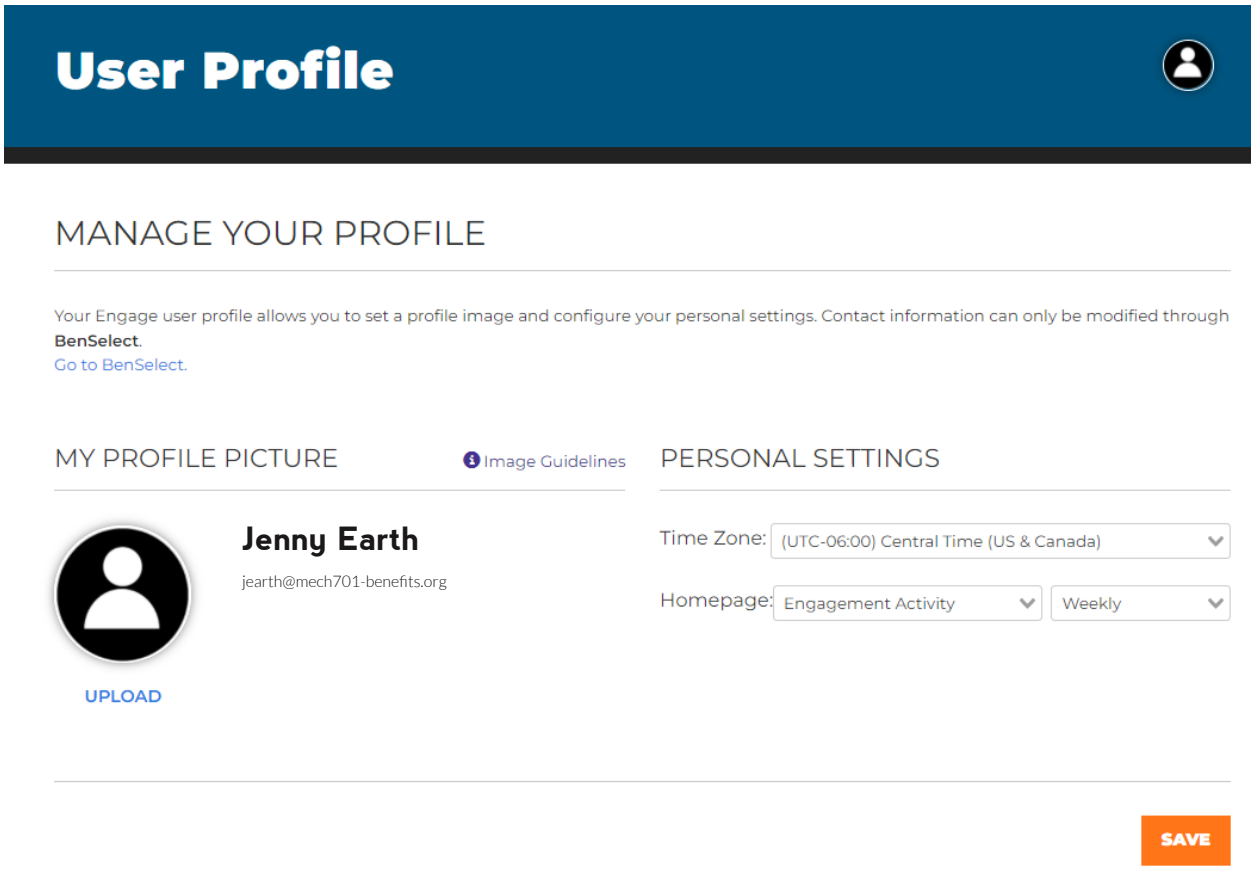




Section 4:
Manage Content Settings

MANAGING USER PROFILE

1. Manage your user profile by clicking on the profile icon in the upper right corner of the page.
2. Upload a profile picture by clicking on UPLOAD.
3. Choose your time zone from the drop-down menu.
4. Set your home page by using the drop-down menu.



Section 4:
Manage Content Settings

CREATING AN UNSUBSCRIBE LINK

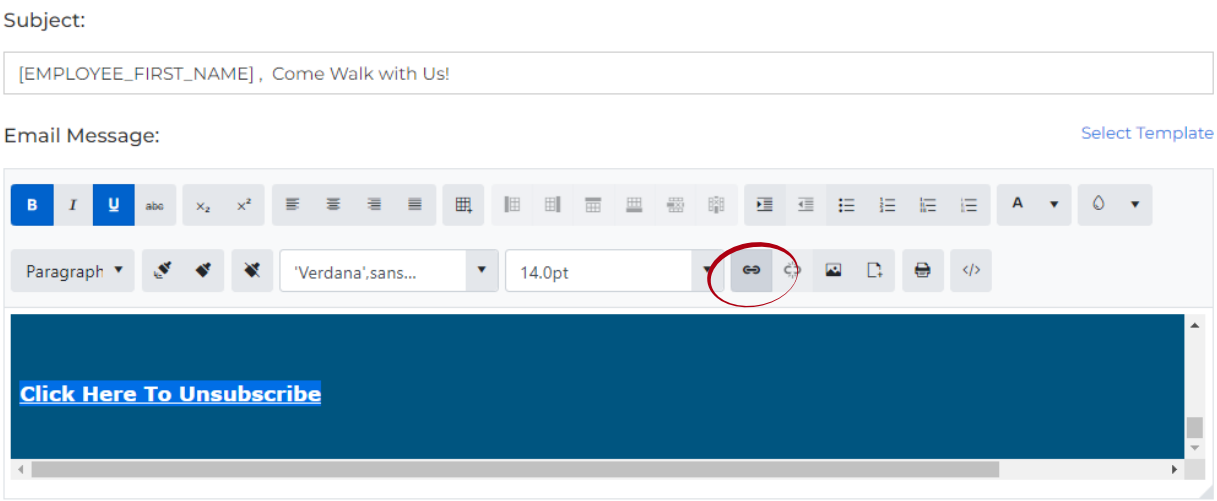
The CAN-SPAM Act of 2003 sets the rules for all commercial email, establishes email requirements, gives recipients the right to stop emails, and dictates penalties for violations.

If the primary purpose of your email is to advertise or promote a commercial product or service it is considered a commercial email and must comply with the requirements of the CAN-SPAM Act.

IMPORTANT DISCLAIMER: Selerix does not provide legal advice. This content is intended merely to raise awareness of some laws that may apply to your use of Selerix's offerings. You are responsible for ensuring your own compliance with any such applicable laws, and you should consult with a legal professional if needed.

To insert the unsubscribe link:

1. Select the content that you will use for the hyperlink.
2. Click on the hyperlink button on the toolbar.
3. Enter the placeholder, [EMPLOYEE_UNSUBSCRIBE_URL], in the web address window.
4. Click the Insert button.



Section 4:
Manage Content Settings

SELERIX ENGAGE CHECKLIST

- Make your selections on the settings page prior to deploying your engagements.
- Whitelist email address – do-not-reply@benselect.com
- Test all engagements (including links) prior to deploying to intended audience
- Preview HTML content pages, landing pages, thank you pages and emails prior to deployment
- Preview estimated audience to review mobile numbers and email addresses
- Download and review recipient spreadsheet
- Continue to review engagements until completed
- Set proper roles and permissions for all administrative users