K-Pulse

for

SharePoint Online

Targeted Messaging for SharePoint

Installation and User Guide

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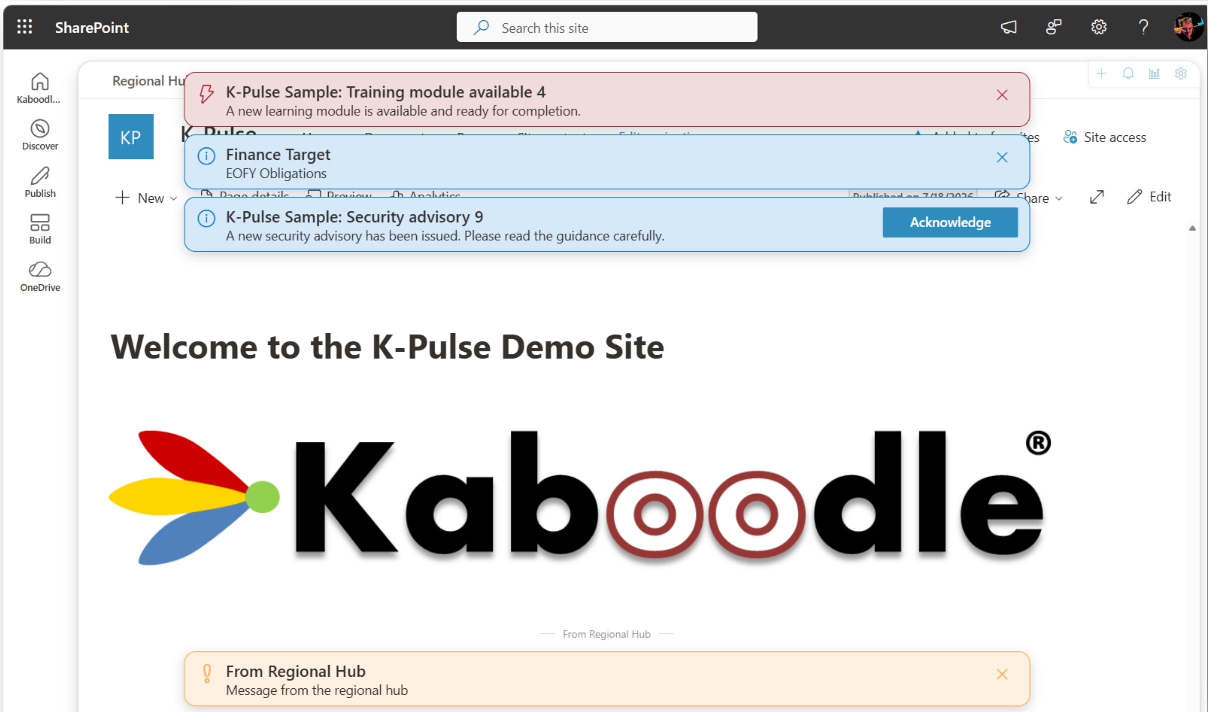
Contents

What is K-Pulse?

K-Pulse allows authorised users to create short notification messages in SharePoint to be displayed in site pages.



Typically, these messages might be used to:

- Communicate urgent information that should be pushed to all users immediately.
- Make targeted announcements to specific user communities.
- Report system outages or maintenance windows.
- Remind users of upcoming deadlines such as when timesheets are due.
- Advise users of updates to key documents such as policies and procedures.

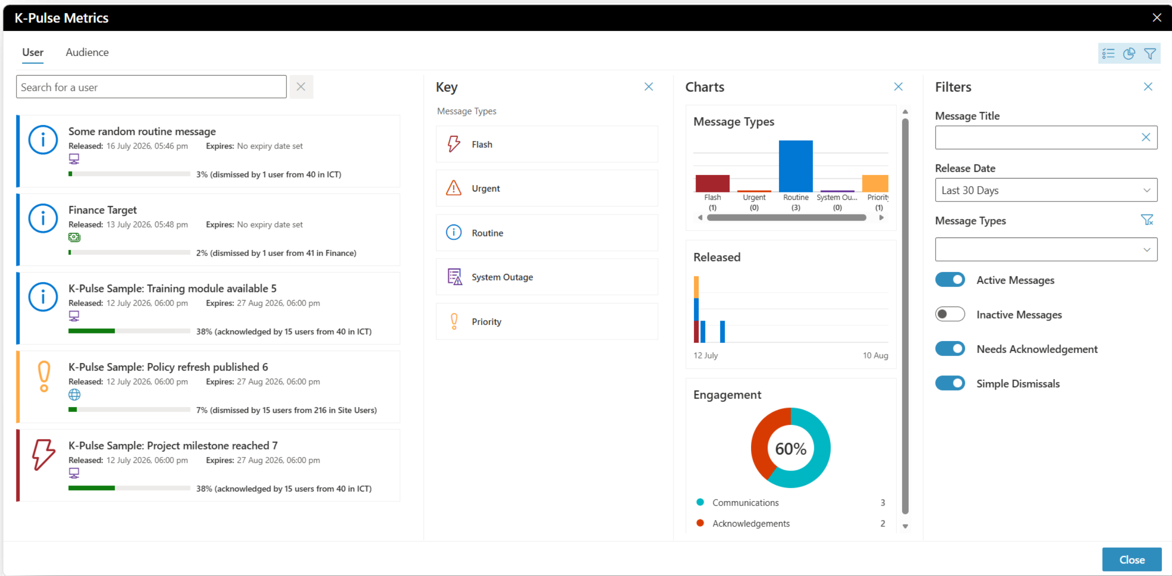
Messages:

- Are shown to all site users by default but can be targeted for specific users or communities (using SharePoint Groups).
- Are assigned a message type with a unique colour and icon to help orientate users to the purpose and relative importance of the message. There are 4 standard message types, but these can be changed and new custom message types can be created by site owners/administrators.
- Can be displayed for a specific time window.
- Can be configured for simple one-click dismissals or to request user acknowledgements.
- Can be displayed as a full width banner message or as a simple notification dialog (shown above) stacked at either the top or bottom of the page.

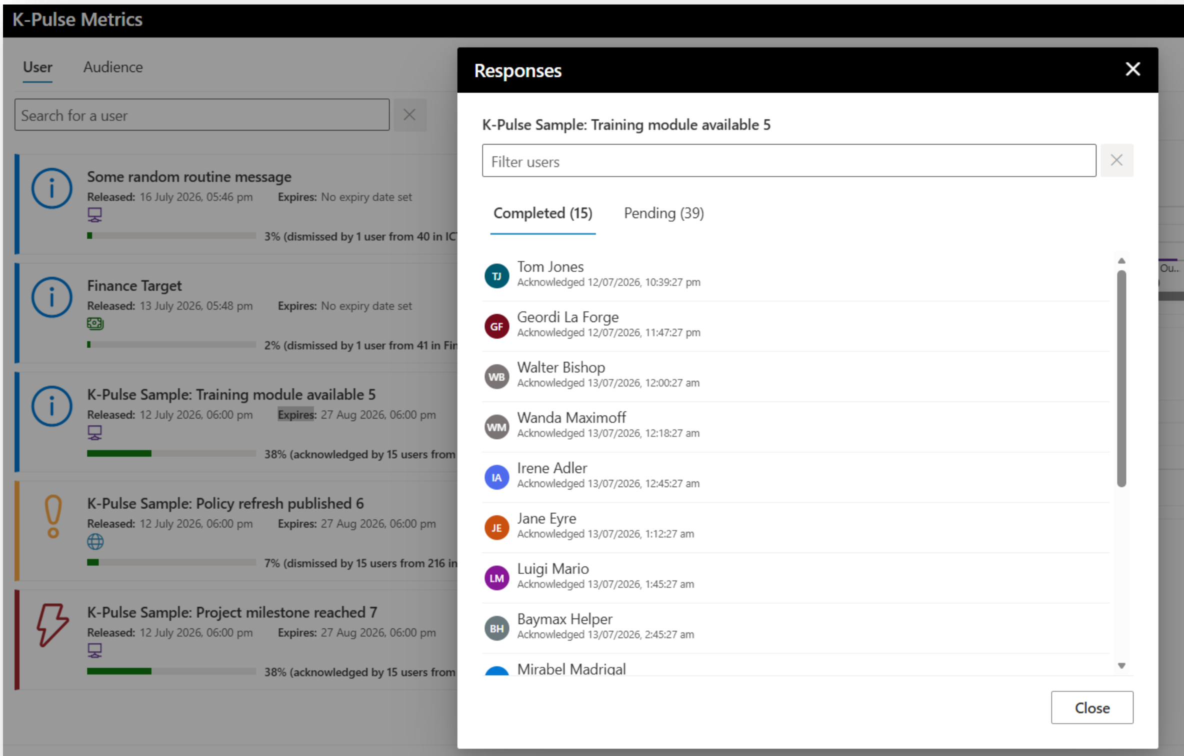
— Can be scoped at the site, SharePoint Hub (including ancestor hubs) or tenancy-wide level.

— Can be defined with a details link so that users can access additional information if required.

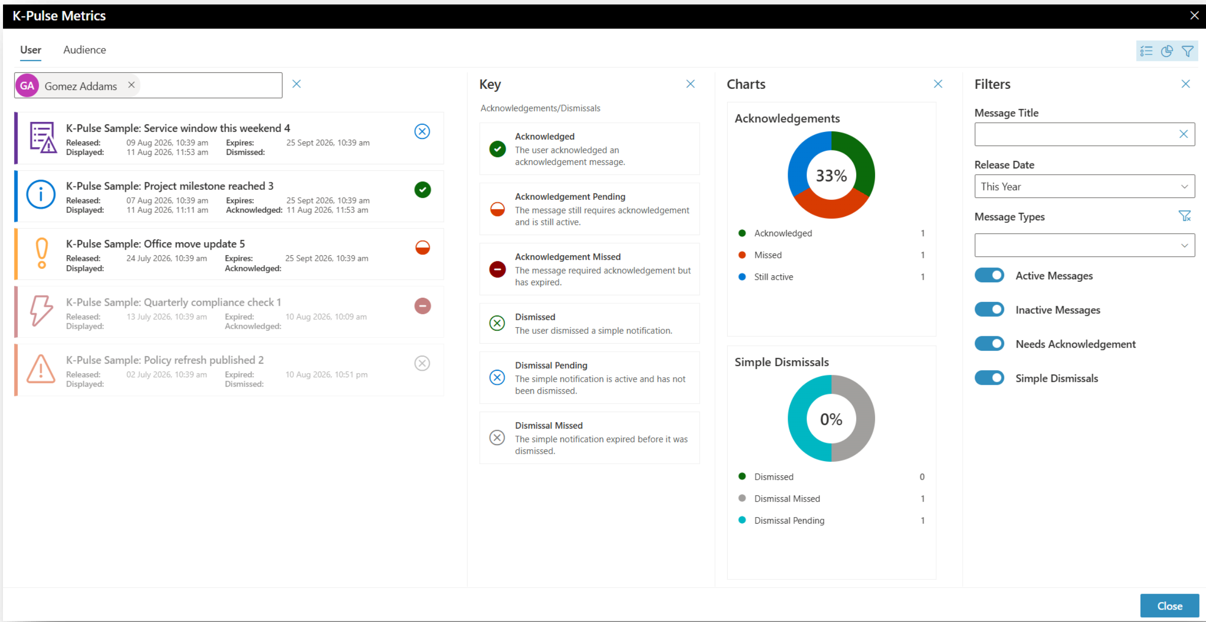
Customers with a paid license can access the metrics dashboard to review dynamic reports and engagement data.



You can check on the current engagement data for specific messages.



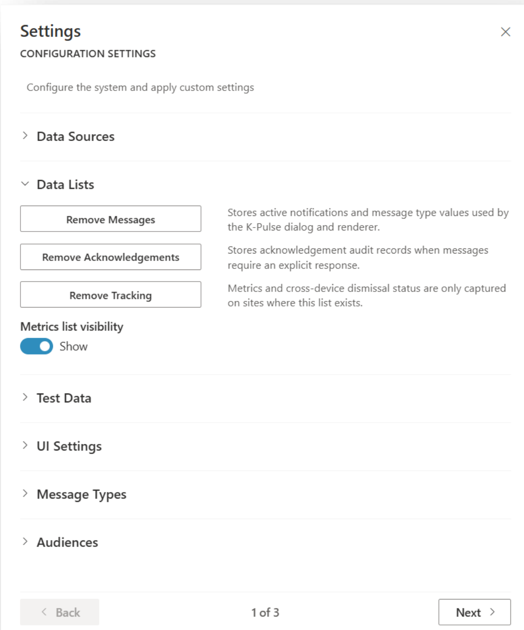
Or check on the engagement for a specific user.



How K-Pulse Works

K-Pulse is a SharePoint Application Customizer extension, built using React and the SharePoint Framework (SPFx). When the solution is deployed to a site, active notification messages will be displayed to users, which can then be dismissed or acknowledged with a single click.

All data is stored in standard SharePoint lists, provisioned automatically by site owners/administrators using the configuration pane.



Using the above configuration pane (only available to users with full control of the site) up to 3 data lists can be set up:

- **K-Pulse Messages**: Used to store the notification messages.
- **K-Pulse Acknowledgements**: Used to store user acknowledgement data.
- **K-Pulse Metrics**: Used to store user engagement metric data and maintain dismissal and acknowledgement date across different devices and browsers.

All 3 of these data lists are optional, as the application can display messages defined in other sites such as a parent (or ancestor) hub site or the SharePoint home site.

No information ever leaves your tenancy and because all data is stored in standard SharePoint lists, the solution fully respects the permissions and access control settings as can be set using the standard SharePoint web UI.

The configuration pane is also used to create and manage message types and target audiences and to apply custom UI settings. It can also be used to generate sample data (messages and mock metrics) for test and evaluation purposes.

Aim

The aim of this document is to guide you through the processes of installing, configuring, and using **K-Pulse**.

Installing the Solution Package

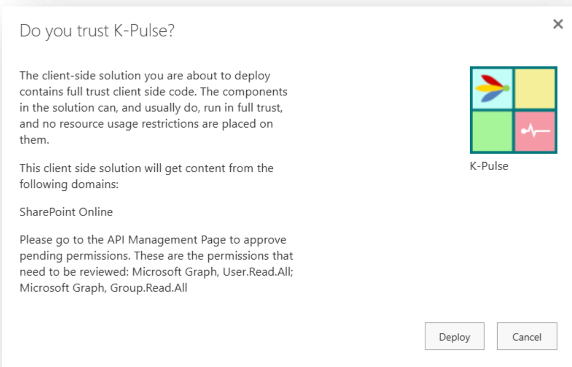
The solution package can either be installed manually or from the Microsoft App Source.

Uploading and Deploying the Solution Package Manually

The packages can be downloaded from the **K-Pulse** product page on the Kaboodle Software web site at https://kaboodle.software/Solutions/K-Connect/K-Connect-Pulse or directly from the Kaboodle CDN at https://kaboodlecustomers.blob.core.windows.net/kconnectpulse/k-connect-pulse.sppkg

This package can be added to an Application Catalog in the same way as with every SPFx solution, that is by uploading the solution package file to the **Apps for SharePoint Gallery** in the Global App Catalog site for the tenancy, or a Site Collection App Catalog, if preferred.

Uploading the solution package will trigger the display of the deploy solution dialog. The screenshot below shows the dialog for the **k-connect-pulse.sppkg** solution package.

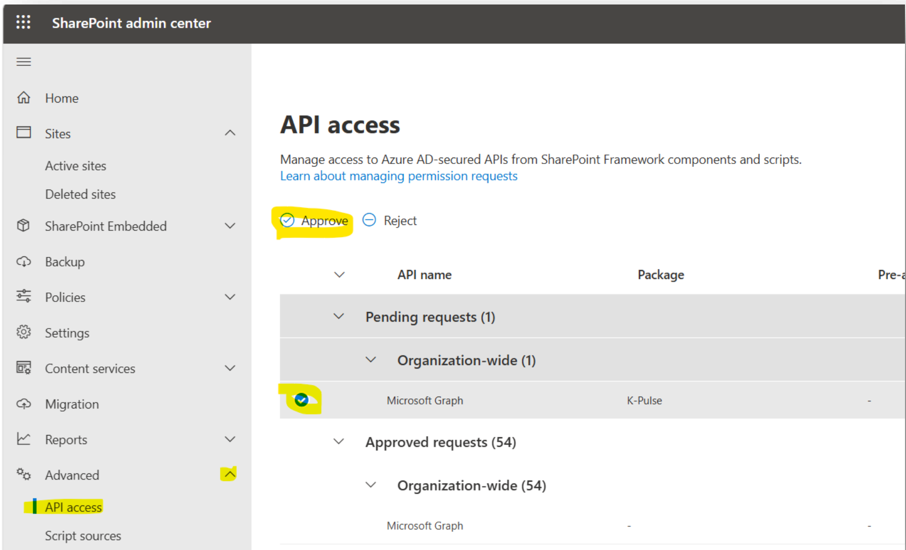


As this is an application customizer solution, we have removed the option to skip feature deployment and so the application cannot be deployed globally. This means that the app must be explicitly added to all sites where **K-Pulse** messages should be created, managed and viewed, as detailed later in this document.

Note that the application requests access to two endpoints of the **Graph API**, specifically:

- **User.Read.All**: Required so the solution can access information about users.
- **Group.Read.All**: Required so the solution can access information about Entra ID security groups and group membership.

Access to one or both Graph API permissions may already be granted but it may be that a tenancy administrator will be required to approve the permission request from the **API access** page in the **SharePoint admin center**.



These permissions are required for metrics tracking and to identify if users belong to target audiences.

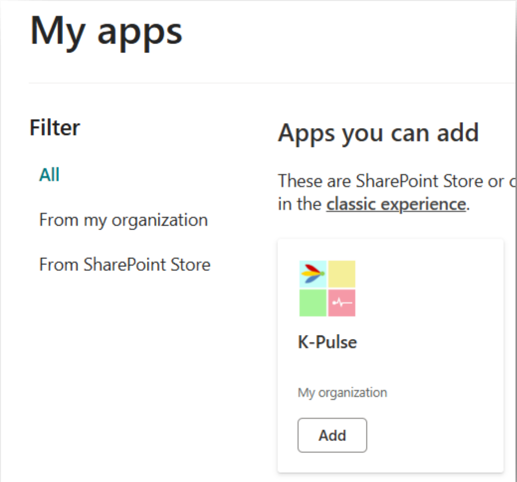
In **K-Pulse**, target audiences are implemented as SharePoint Groups which may contain users and Entra ID security groups. If the requested **Graph API** permissions are not granted, the application will only be able to determine if a user belongs to an audience if that user is assigned as member of the SharePoint Group directly as opposed to having membership indirect via Entra ID security group.

Installing K-Pulse

As mentioned above, K-Pulse cannot be globally deployed and must be explicitly installed on every site where notification messages are to be displayed.

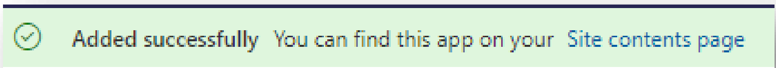
To do this, click on the ***App an app*** link from the ***Site Actions*** menu (the cog icon on the top right corner of every page) or from ***New > App*** menu item from the site homepage or **Site Contents** page.

From the ***My apps*** page you will see the **K-Pulse** app card in the ***Apps you can add*** section of the page as shown below.

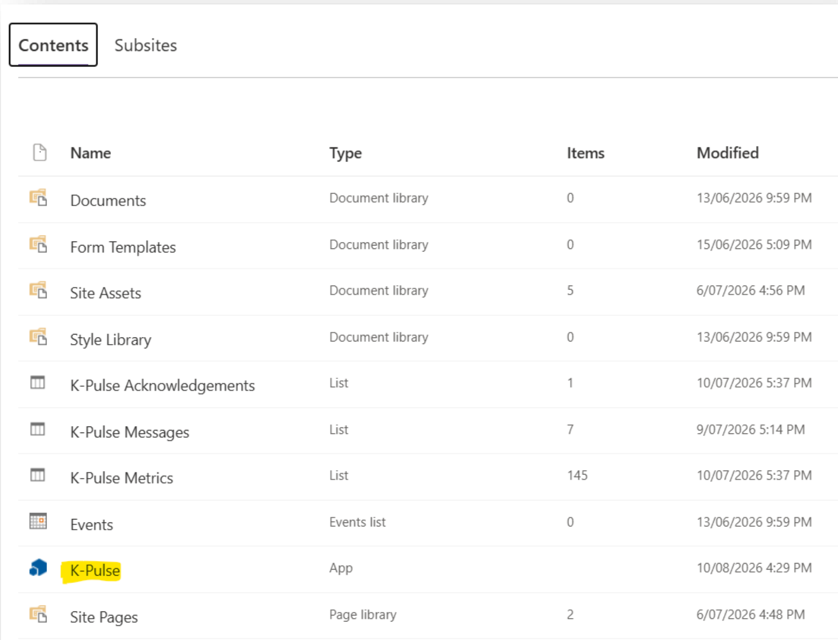


Note that you must be logged in to the site with at least Designer-level permissions to be able to add an app to the site.

To add **K-Pulse**, simply click the ***Add*** button on the **K-Pulse** app card. It may take several seconds but the SharePoint UI will report when it has been successfully installed and display a green status message, like that shown below.



If you click on the ***Site contents page*** link, you will see the app listed, as highlighted below.



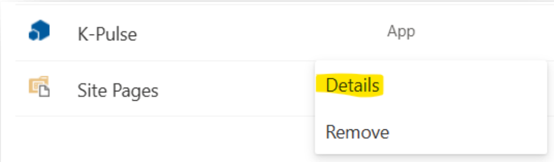
This is all that is required for the solution to display messages that may be defined in a parent hub site, the tenancy root site or the SharePoint Home Site.

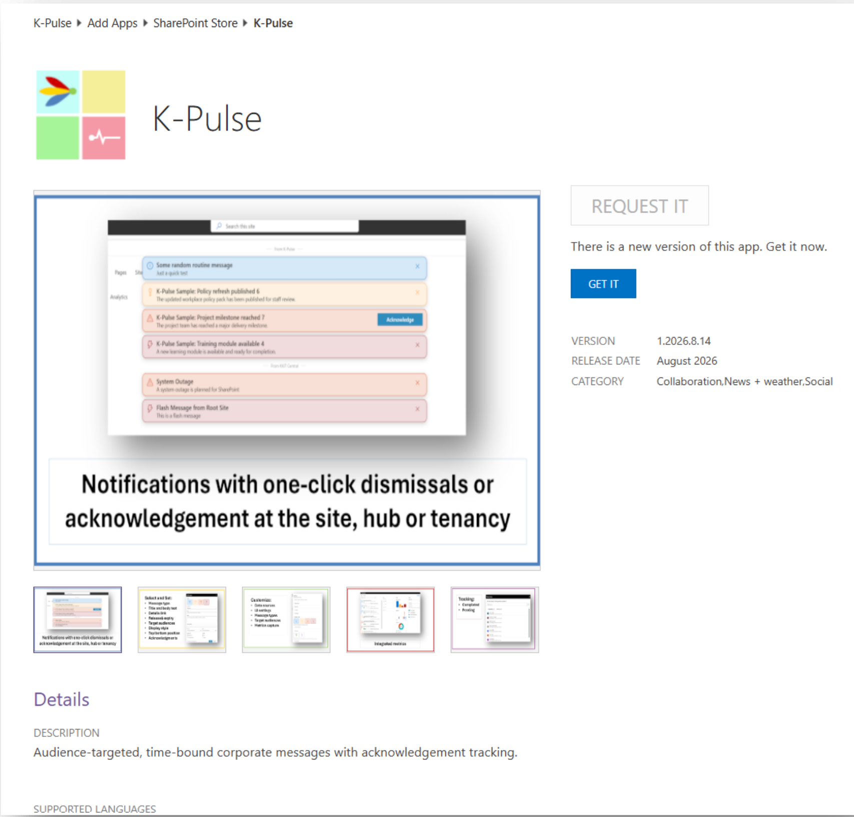
However, to create messages within local site, the application and site must be appropriately configured, as described in the next section of this document.

Updating the Solution Deployment

To update the solution package simply download the new solution package file from the Kaboodle web site or CDN link and upload it to the app catalog and redeploy the solution in the same way as for every SPFx solution.

It is not usually necessary to explicitly update the application on each SharePoint site, although after an update, accessing the Details menu item from Site Contents will report that a newer product version is available for installation.[1]



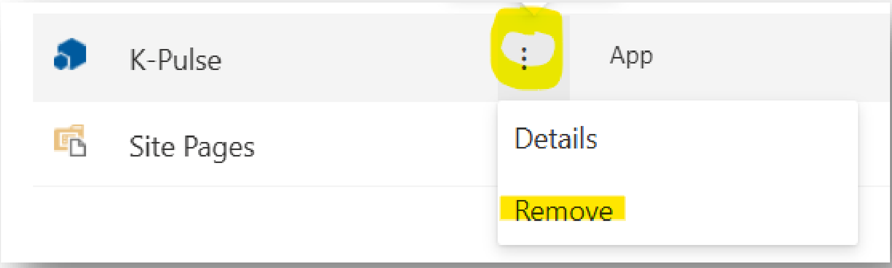


[1] This is standard SharePoint behaviour. An explicit update installation is only required if the solution packages have been significantly extended to include additional SPFx components (web parts or customizers).

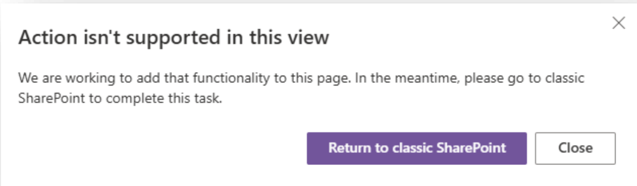
Clicking the **GET IT** button will ensure that the app reports that site is up to date.

Uninstalling the App

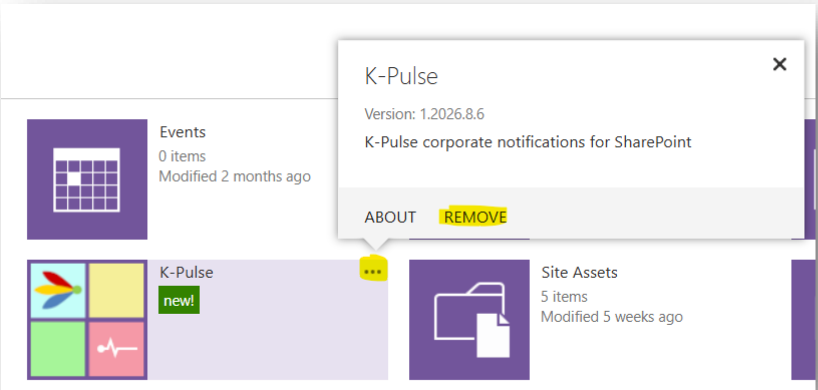
To remove the app, select the **Remove** menu item from the app ellipsis menu for the app in the **Site Contents** page.



SharePoint will then report that apps can only be removed when in classic mode and so you are required to switch to classic.



From classic mode, select the option to remove the app from the button on the app callout



After confirming the action, a few seconds later the app will be removed from the site. To confirm that the app has been removed you can return view Site Contents in the modern UI.

Installing from the Microsoft App Source

To be provided.

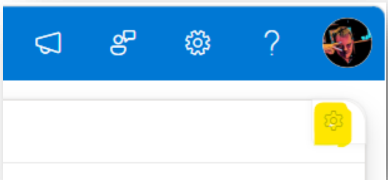
Configuring K-Pulse

Once K-Pulse has been installed on a site, you will want to configure the application.

Note that if the intention is for the site to simply display messages created in another site (such as a parent hub site) additional configuration steps may not be required, but in most cases, you will likely want to create messages locally within the site.

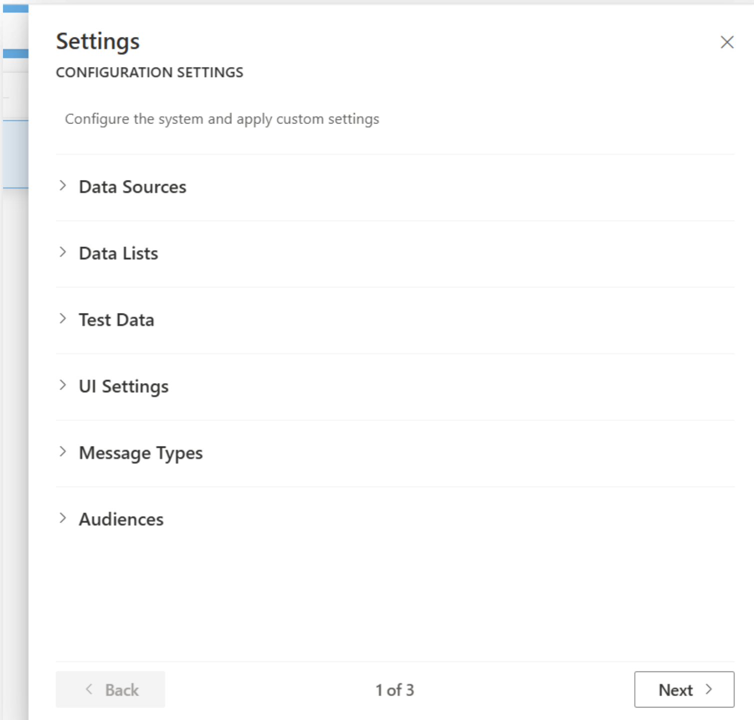
This section provides detailed guidance on how to configure **K-Pulse**.

All **K-Pulse** configuration settings are applied using the **Configuration Pane**, which is accessed by clicking the **Settings Button** in the mini-menu bar displayed on the top-right corner of all site pages.



Note that the **Settings Button** is only displayed for users who have full control of the site. This usually means users in the site owners group and site collection administrators.

Clicking the **Settings Button** will display the **Configuration Pane** as shown below:

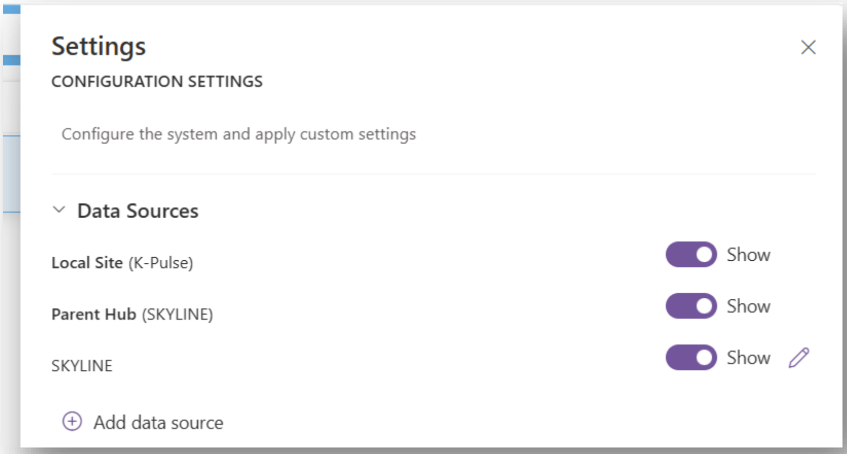


As the above screenshot shows, the **Configuration Pane** consists of 3 pages which can accesses using the **Next** and **Back** buttons, at the bottom of the panel.

The Configuration Settings Pane

This page contains all the controls required to configure **K-Pulse**. These controls are grouped into 6 expandable sections.

Data Sources



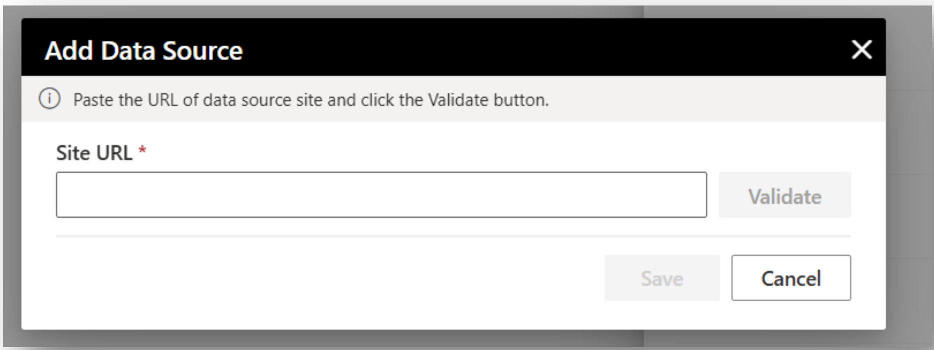
The controls in the **Data Sources** group allows you to select and identify sites that may provide messages to be shown when users access the site.

The local site is always listed first, followed by the hub site with which the local site is associated (if any). Any grandparent or great-grandparent hub sites will be listed next, potentially followed by the root site of the tenancy and the SharePoint Home Site (if specified).

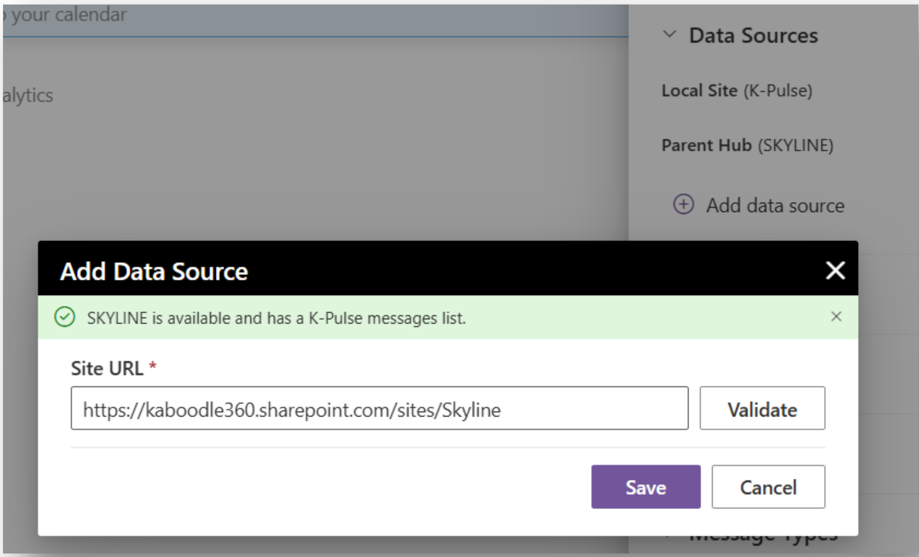
Note that these sites are only listed if **K-Pulse** has been installed on the sites and the contain a **K-Pulse Messages** list.

You can also select a specific site as a data source site using the **Add data source** link button.

Clicking this button will display the **Add Data Source Dialog**.



In the dialog, set the URL of any site within the tenancy to act as a data source and click the **Validate** button to ensure that the link is valid and the site can be accessed.

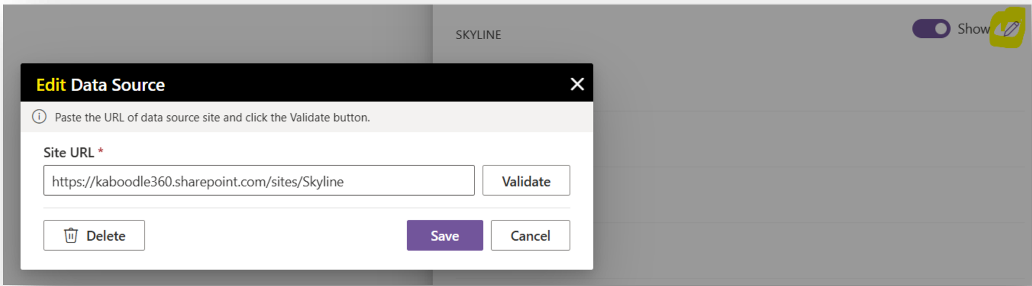


Click the **Save** button to create the data source.

Using specific sites as data sources provides the option to create one or more dedicated messaging sites, so that messages may be managed centrally as an alternative to a more distributed messaging architecture.

K-Pulse fully respects access control as applied in SharePoint and will simply not display any messages from any sites for which the user has no access.

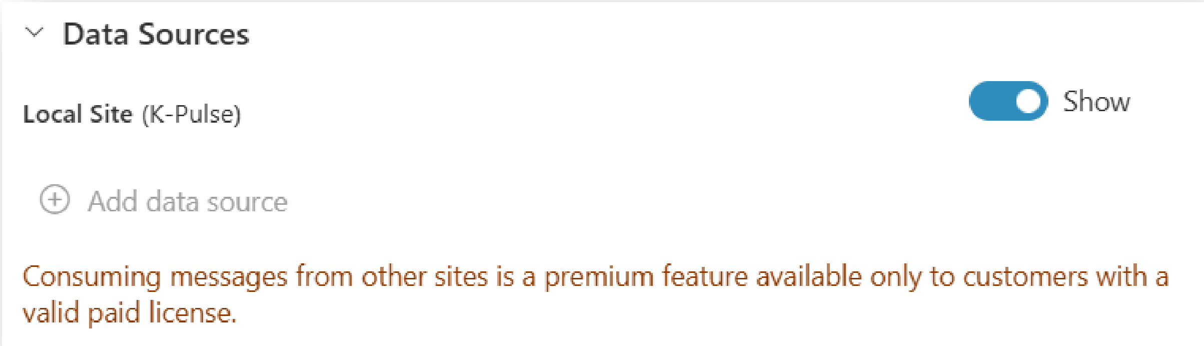
You can use the **Edit Button** next to explicitly defined data sources to open the data source dialog in edit mode.



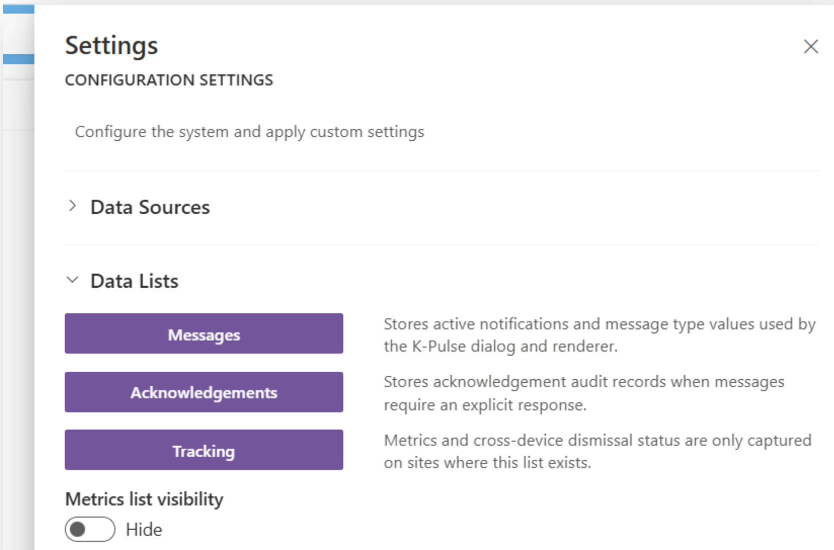
The **Edit Data Source Dialog** allows you to update the URL or delete the data source.

Use the relevant toggle switch to show or hide messages originating from these data source sites.

Note that consuming messages from multiple sites is a premium feature that is only available to license-paid customers. The screenshot below shows the **Data Sources** group when K-Pulse is operating in Freemium mode.

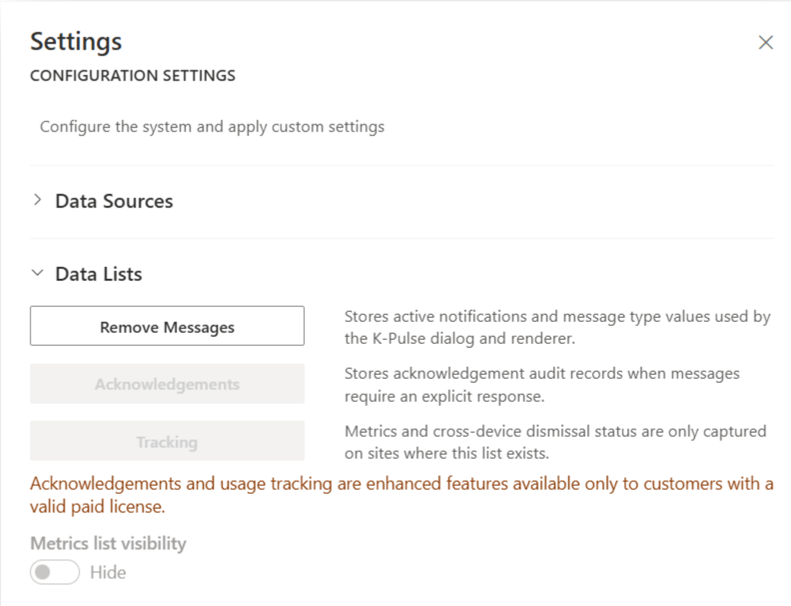


Data Lists



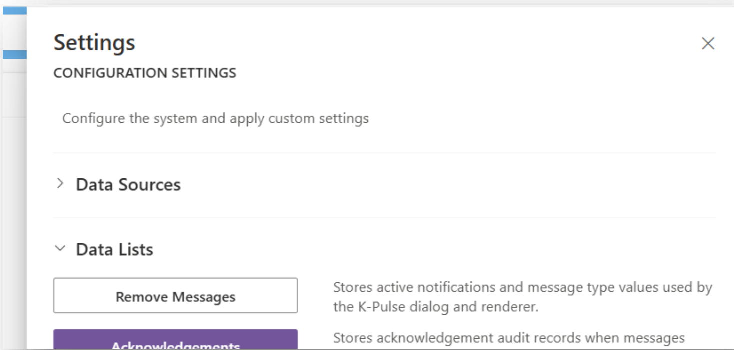
As mentioned previously, all application data is stored in up to 3 custom lists. The controls in this section allow these lists to be automatically provisioned at the click of a button.

Note that acknowledgments and usage tracking are enhanced feature, available to license-paid customers only. Freemium customers will be presented with the following:

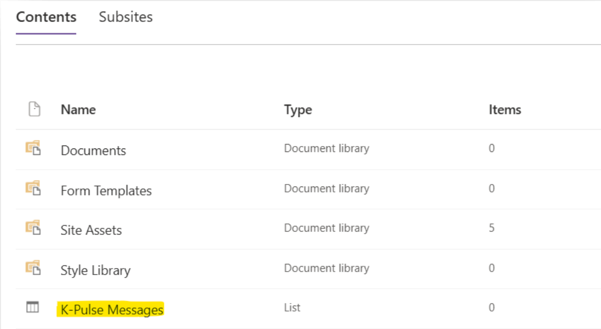


The Messages Button

Click the **Messages Button** to provision a **K-Pulse Messages** list in the local site. The process will take a few seconds, and the UI will update to show the **Remove Messages** button which can later be used to send the current **K-Pulse Messages** list to the recycle bin, if the application is no longer needed.



Once a **K-Pulse Messages** list has been provisioned, it can be viewed from **Site Content**.

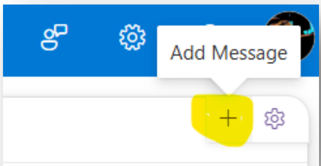


Contents Subsites

Name	Type	Items
Documents	Document library	0
Form Templates	Document library	0
Site Assets	Document library	5
Style Library	Document library	0
K-Pulse Messages	List	0

The title of this list can be updated if desired, but this is not necessary because new messages are usually created from the mini toolbar rather than from the list directly. Whilst creating messages directly in the list is technically possible it will require detailed technical knowledge of how the application has been configured and so this approach is not recommended.

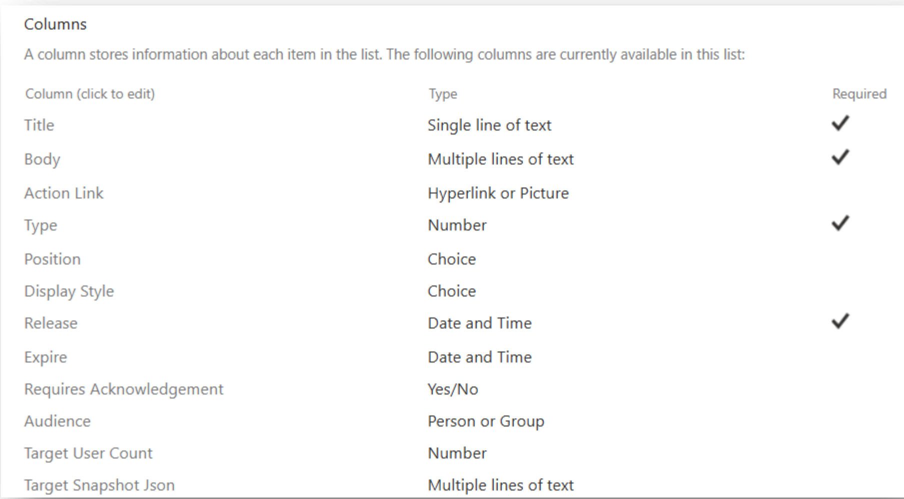
Once a **K-Pulse Messages** list has been added to the site, the mini toolbar updates to display the **Add Messages Button**.



The **Add Message Button** is only displayed to users who have permissions to add items to the **K-Pulse Messages** list.

Clicking the button will display the **Add Message Dialog**, detailed later in this document.

The screenshot below shows the columns defined in the **K-Pulse Messages** list.



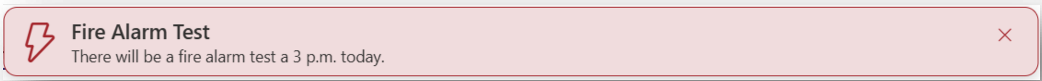
Columns

A column stores information about each item in the list. The following columns are currently available in this list:

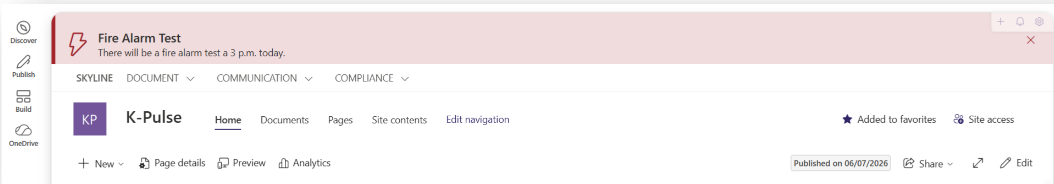
Column (click to edit)	Type	Required
Title	Single line of text	✓
Body	Multiple lines of text	✓
Action Link	Hyperlink or Picture	
Type	Number	✓
Position	Choice	
Display Style	Choice	
Release	Date and Time	✓
Expire	Date and Time	
Requires Acknowledgement	Yes/No	
Audience	Person or Group	
Target User Count	Number	
Target Snapshot Json	Multiple lines of text	

The purpose of each of these columns is summarised below:

- **Title**: The default single-line text column used to provide the header title text of the message
- **Body**: A multi-line text field that will contain the message content
- **Action Link**: Optionally used to specify a link to another page or resource
- **Type**: A number column used to define the unique identifier for the selected message type.
- **Position**: A Choice column with the just 2 options:
    - **Top**: The message will appear at the top of the page
    - **Bottom**: The message will appear at the bottom of the page
- **Display Style**: A Choice column with just 2 options:
    - **Floating Pill**: The message will be displayed as a floating dialog with rounded corners



    - **Full Width Banner**: The message will be displayed as a full-width banner



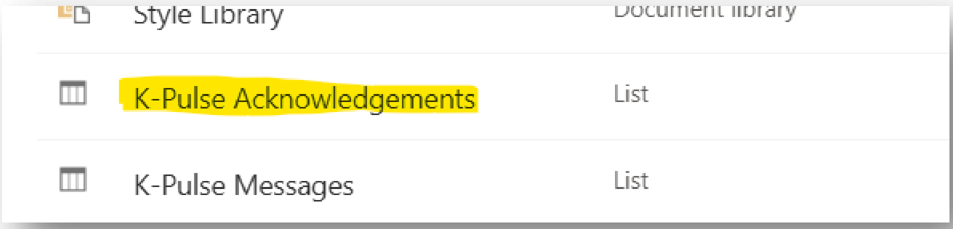
- **Release**: A date column used to specify the date and time from which the message will be active and so displayed to users. Be default, the Release column value will be the date and time when the message was created but the value might be a future date time so messages can be scheduled in advance.
- **Expire**: A date column used to specify the date and time from which the message should no longer be shown. An expiry value is not set by default. Messages without an Expire value are considered not to have expired and so will continue to be displayed until the message is dismissed or acknowledged but the user.
- **Requires Acknowledgement**: A Yes/No column used to designate whether the message requires users to explicitly acknowledge that they have read and understood the message or if a simple message dismissal is adequate.
- **Audience**: This is a user column which supports multiple users and groups. By default, (when no users or site groups are selected), the audience for a message will be all users who can access the site (the union of **Site Owners**, **Site Members** and **Site Vistors**) but the message may be targeted at one or more specific audiences. In **K-Pulse** an audience is simply a SharePoint Group. If a message is associated with an audience SharePoint Group, the message will only be displayed if the user is a member of at least one of these associated groups. This is implemented by setting unique permissions on those messages with a custom audience.

- **Target Audience Count**: This number column is set when a message is created or updated and stores the number of distinct users that may potentially access the message. Note that this is an approximate value and not an exact one, as it does not include users who can access the site as guests or via direct access links.
- **Target Snapshot JSON**: This multiline text field is used to store a fragment of JSON which assists with metrics and usage reporting. The value in this column should not be updated manually.

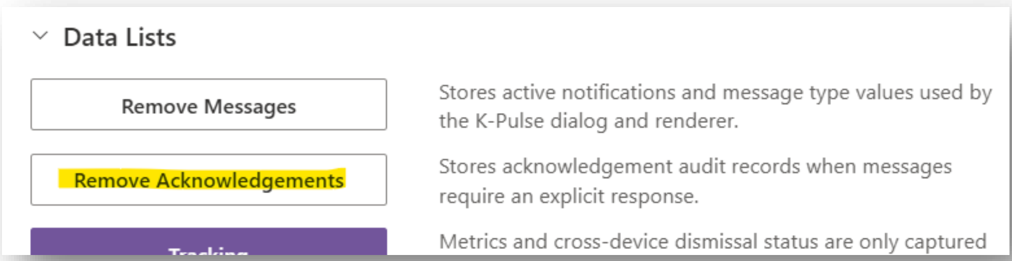
When the **K-Pulse Messages** list provisioned, a new SharePoint Site Group called **K-Pulse Managers** is added to the site and unique permissions are applied such that members of the **K-Pulse Managers** SharePoint Group have **Full Control** of the **K-Pulse Messages** list and users in the standard site visitors group have read-level permissions.

If these default permission settings are not to your liking, they can be adjusted by a site owner/administrator using the standard SharePoint web UI. However, be careful when changing these permissions as you may want message managers to be able to use target audiences and for that to work, it will be necessary for the users to be able to change item permissions and hence the need for Full Control (at the list level only – not at the site level).

The Acknowledgements Button
Click on this list to automatically provision a list to stores user acknowledgment data.

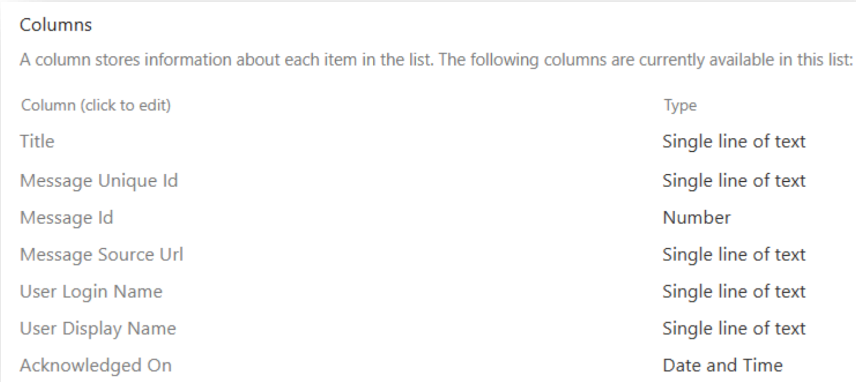


As with the **K-Pulse Messages** list, when the list has been created, the button will be updated to show the **Remove Acknowledgements Button** which can be used to send the **K-Pulse Acknowledgements** list to the recycle bin.



You only need to provision a **K-Pulse Acknowledgements** list if some of the messages create in the **K-Pulse Messages** list will require explicit user acknowledgements. If your messages require simple dismissals only, you do not need to provision a **K-Pulse Acknowledgements** list.

The columns defined in a **K-Pulse Acknowledgements** list are shown in the screenshot below:



Columns

A column stores information about each item in the list. The following columns are currently available in this list:

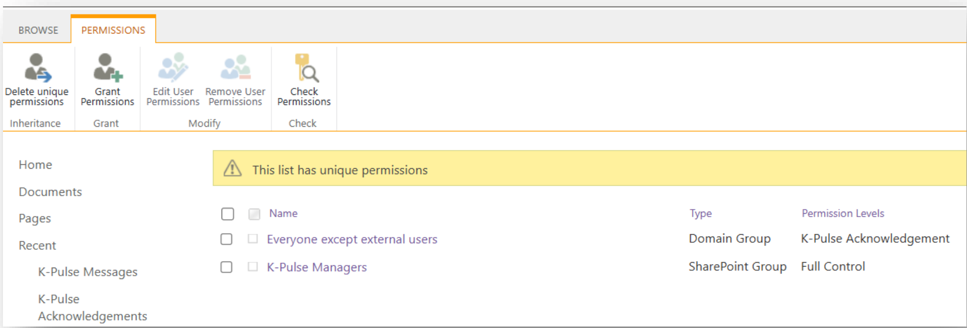
Column (click to edit)	Type
Title	Single line of text
Message Unique Id	Single line of text
Message Id	Number
Message Source Url	Single line of text
User Login Name	Single line of text
User Display Name	Single line of text
Acknowledged On	Date and Time

The **K-Pulse Acknowledgements** list is used to provide a record of when a user clicked the **Acknowledge Button** of a message to indicate that they have read and understood the message. The option to create a message that requires an acknowledgement is set when the message is created but this option is only available if a **K-Pulse Acknowledgements** list has been provisioned on the site.

The purpose of each column is as follows:

- **Title**: The default single line text column, set to the same value as the message.
- **Message Unique Id**: A single line text column containing the unique ID (GUID) of the message list item.
- **Message Id**: A number column containing the list item integer ID of the message.
- **Message Source URL**: The URL of the site in which the message was created.
- **User Login Name**: The login/email address of the user who acknowledged the message.
- **User Display Name**: The display name of the user who acknowledged the message.
- **Acknowledged On**: The date and time that the user acknowledged the message.

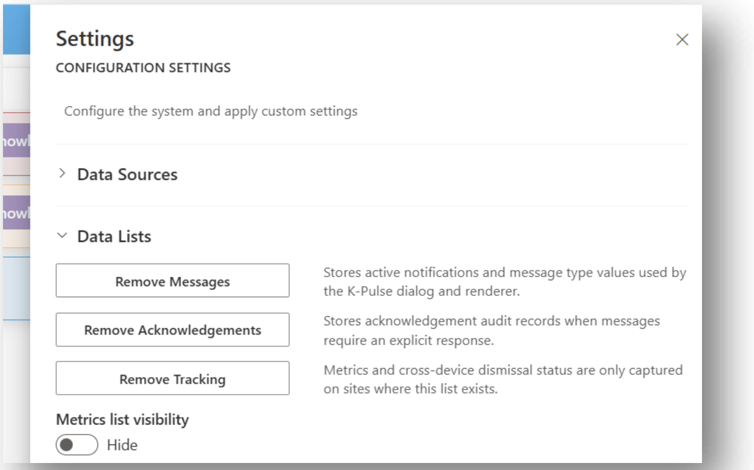
When a **K-Pulse Acknowledgements** list is provisioned, a custom **Permission Set** called **K-Pulse Acknowledgement** is set up. This **Permission Set** has been configured to grant users with the permissions needed to add an acknowledgement list item but not to delete or edit any existing list items. By default, the standard **Everyone except external** users group has been granted these permissions and the **K-Pulse Managers** group (set up when the messages list was provisioned) is granted **Full Control**.



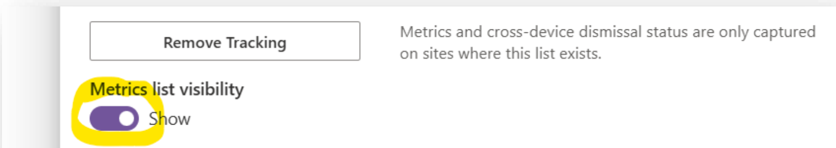
As with the messages list, the permissions on this list can also be adjusted, but you must make sure that users required to acknowledge messages have the necessary permissions to do so, or else the acknowledgement will be treated as a simple dismissal.

The Tracking Button

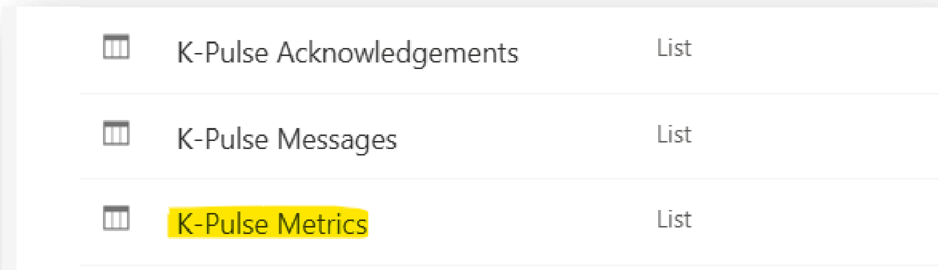
Clicking this button will generate a metrics tracking list in the site. As with the other lists, when a tracking list is found, the **Remove Tracking Button** will be displayed, allowing the tracking list to be sent to recycle bin if need be.



By default, the tracking list is hidden, but the visibility can be changed using the toggle switch.



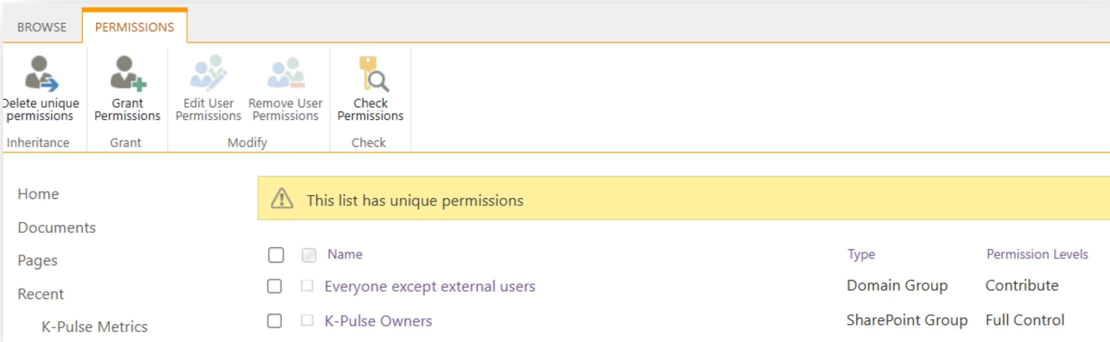
When set to **Show**, the list is then displayed in **Site Contents**.



Unlike with the **K-Pulse Acknowledgements** list where an acknowledgement list item is added only when the user acknowledges a message, a record for every user is added to the **K-Pulse Metrics** list when the message is first displayed to the user.

Customers that use a Freemium version of **K-Pulse** will still be able to provision a metrics list, but no metric list items will be added to the tracking list. Usage and metrics tracking is premium feature, available to license-paid customers only.

When the metrics list is provisioned, unique permissions are set up such that the standard site **Owners** group are granted **Full Control** and the standard **Everyone except external users** group are granted **Contribute** level permissions.



As with the other data lists, the access control settings for this list can be updated as required, but note:

- You will need to set the list visibility to **Show** to access the **List Setting** in the standard SharePoint UI, but you can always set the visibility back to **Hide** once configuration changes are complete.
- If users do not have the permissions required to create and update items in the tracking list, no tracking data can be saved by the system.

The metrics tracking system (when available and configured), works like this:

- When a message is first shown to a user, an item is added to the **K-Pulse Metrics** list.
- When a message is dismissed or acknowledged, the list item for the user is updated.

The **K-Pulse Metrics** list is provisioned with the columns shown below:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Message Unique Id	Single line of text
Message Id	Number
Message Source Url	Single line of text
Message Title	Single line of text
Message Type	Single line of text
Message Release Date	Date and Time
Message Expiry Date	Date and Time
Requires Acknowledgement	Yes/No
Audience Json	Multiple lines of text
User Login Name	Single line of text
User Display Name	Single line of text
First Page Url	Single line of text
First Displayed On	Date and Time
Dismissed On	Date and Time
Acknowledged On	Date and Time
Action Clicked On	Date and Time
Action Click Count	Number
Restored On	Date and Time
Time To Dismiss Seconds	Number
Time To Acknowledge Seconds	Number

— **Message Title**: The standard single line text title field, set to the title of the message appended with a hyphen and the user's display name.

— **Message Unique Id**: The unique ID (GUID) of the item in the messages list.

— **Message Id**: A number column containing the list item integer ID of the message item.

— **Message Source URL**: The URL of the site in which the message was created.

— **Message Type**: A text value indicating the message type.

— **First Page URL**: The URL of the site page on which the message was first displayed to the user.

— **First Displayed On**: The date and time when the message was first displayed to the user.

— **Dismissed On**: The date and time when the message was dismissed (when the message was configured for a simple dismissal).

— **Acknowledged On**: The date and time when the message was acknowledged (when the message was configured for user acknowledgements).

— **Action Click On**: The date and time when the user clicked on the item link (when the message is configured with a link).

— **Action Click Count**: A number field which track the number of times the user clicks the link (when the message is configured with a link).

— **Restored On**: **K-Pulse** allows dismissed and acknowledged items to be restored so that they will again be displayed on site pages and this column is used to track when the user restored a message (if it was restored).

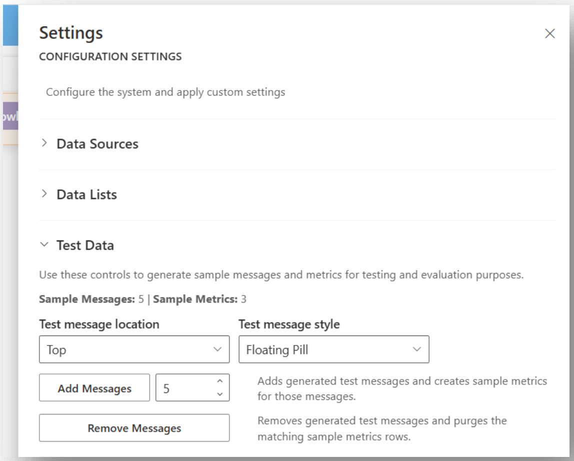
— **Time to Dismiss Seconds**: The number of seconds between when the message was first displayed to the user and when it was dismissed (when the message was configured for a simple dismissal).

— **Time to Acknowledge Seconds**: The number of seconds between when the message was first displayed to the user and when it was acknowledged (when the message was configured for user acknowledgements).

Using the **K-Pulse Metrics** list provides an additional feature. When users dismiss or acknowledge a message, that information is stored in browser local storage. This means that if users access the system via different browsers or devices or they drop browser local storage, they may be presented with messages that they have already seen and dismisses/acknowledged.

However, when metrics are enabled, a check is also made on the **K-Pulse Metrics** list to see if the message needs to be displayed. As this information is stored in SharePoint and not on user client devices, this ensures that users do not get presented with messages that they have already seen and dealt with.

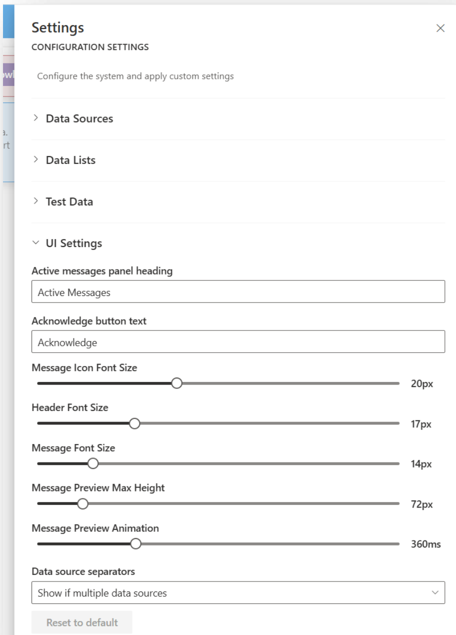
Test Data



The controls in this section can be used to create and subsequently remove sample test messages to can be useful for test and evaluation purposes.

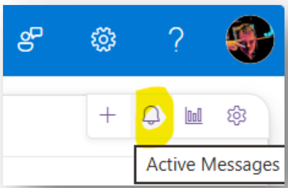
If the site is configured with a metrics tracking list, a set of sample metrics will also be added so that metrics tracking capabilities can also be evaluated.

UI Settings

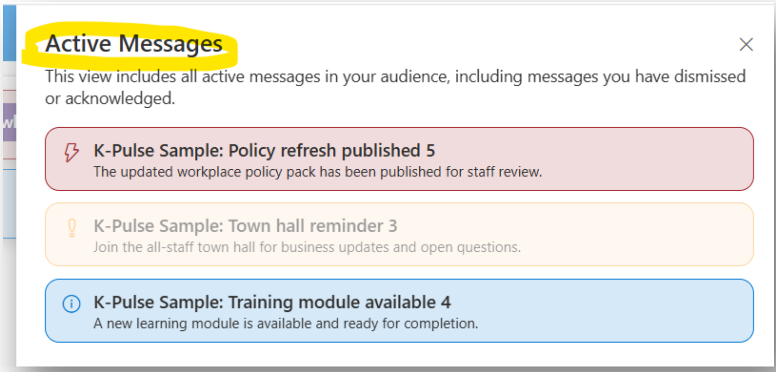


This section contains controls which allow the application UI to be customised.

Active Messages Panel Header Textbox
Controls the text that is displayed on the panel which displays the list of active messages. This panel is shown when the user clicks the **Active Messages Button** in the mini toolbar.



The **Active Messages Button** is only displayed when there are active messages for the user. Clicking the button, displays the panel as shown below:



The text value in the **Active messages panel header** text field control can be used to specify the panel header text, highlighted above.

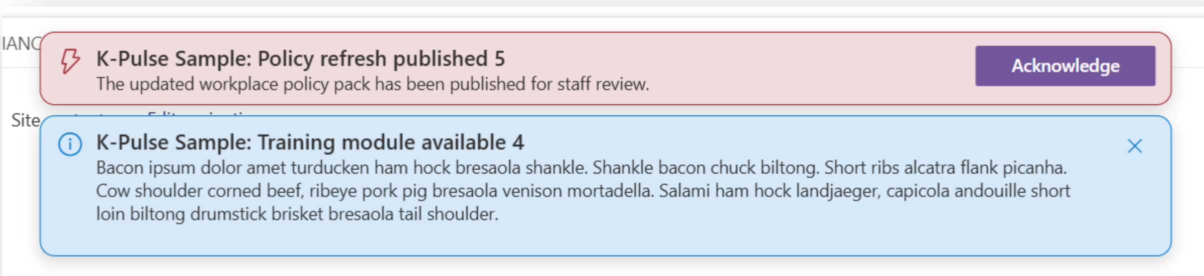
Acknowledge Button Textbox
This control is used to specify the button text displayed when a message is configured for user acknowledgment.

Message Icon Font Size Slider
This slider control is used to set the size of the icon displayed in the message. The icon (and colour) is defined by the message type assigned to the message.

Header Font Size Slider
This slider control is used to set the font size of the message header text.

Message Font Size Slider
This slider control is used to set the font size of the message body text.

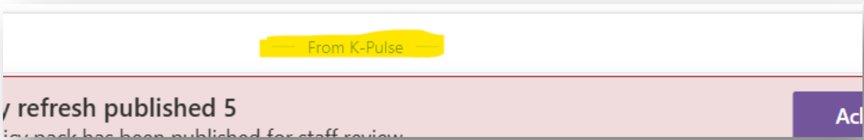
Message Preview Max Height Slider
If a message is configured with a long message body text, it can look ugly in the UI. Use this slider control to set the maximum height of message. The full message will be displayed when the user hovers over the messages. For example, the screenshot below shows a long message with the default value of 72px.



When the user hovers over the long message, the full body text is revealed.

Message Preview Animation Slider
This slider is used to control the time taken, in milliseconds, to reveal messages with long body text.

Data Source Separators Picker
This picker is used to control if and how messages from content sources are separated. A separator is a small site title as highlighter below:



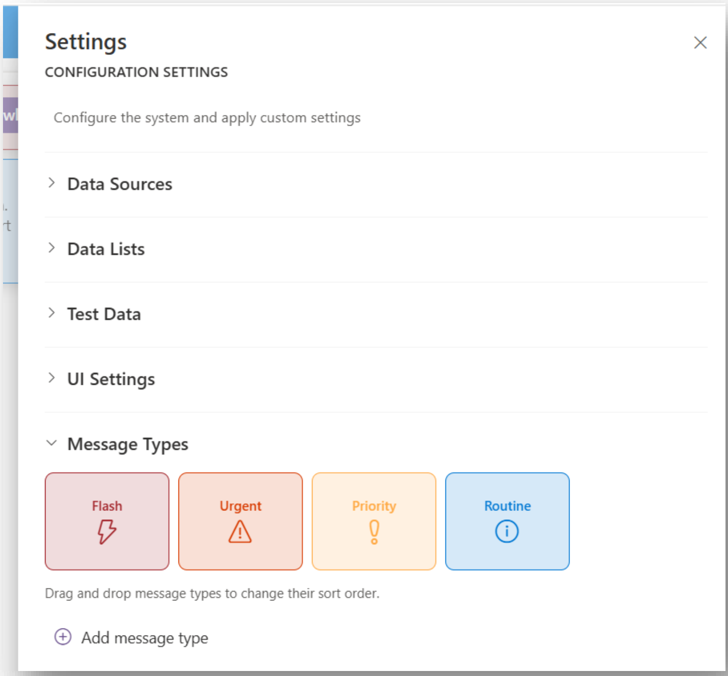
All messages are grouped according to their data source and ordered based on the release date value descending i.e. the most recently released messages are displayed first within each data source group.

The possible values are:

- **Always show**: A separator is always displayed as a header to all messages for every data source.
- **Show if multiple data sources**: A separator is displayed if, and only if, there are messages to display that come from more than a single data source.
- **Show if non-local data source**: A separator is always displayed for non-local data sources but not for messages hosted on the local site. This is the default value.
- **Never show**: No separators are ever displayed.

The Reset to Default Button
When any of the custom UI values deviate from the default value, this button will be enabled. When clicked, all custom UI settings will be reset to their default values.

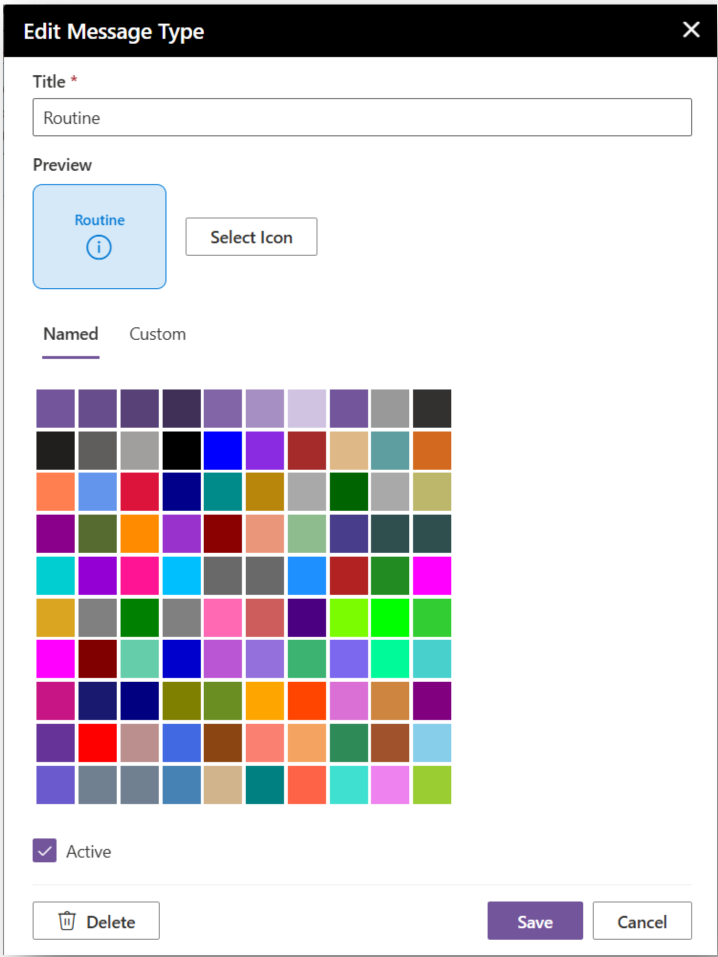
Message Types



This controls in this section are used to create a manage message types. Every message must be associated with a valid message type.

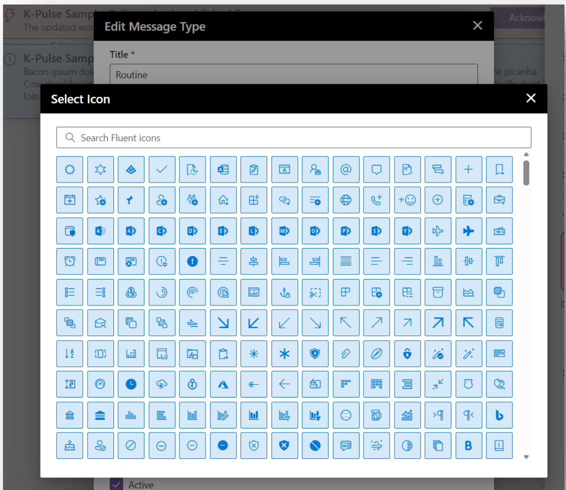
The 4 standard message types of **Flash**, **Urgent**, **Priority** and **Routine** are automatically set up by default.

To edit an existing message type, simply click on the message type tile to display the **Edit Message Type Dialog**.



Use this dialog to set the message type title, icon and color.

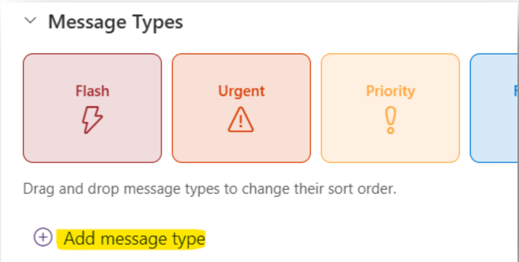
Clicking the **Select Icon Button** will display the **Select Icon Dialog**.



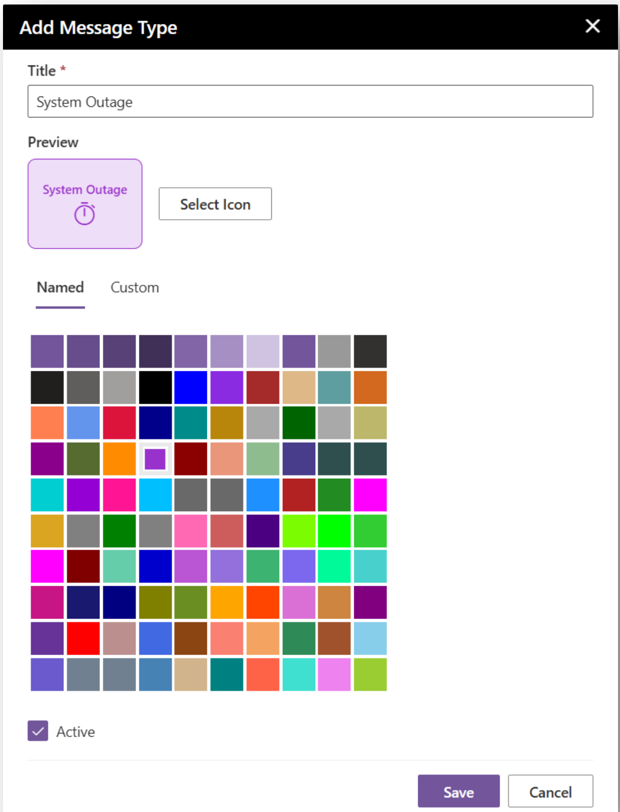
Use the controls in this dialog to select an appropriate icon for the message type.

You can use the **Active Checkbox** to temporarily disable a message type or the Delete button to permanently delete a message type.

To create a new message type, click the **+ Add message type** button.

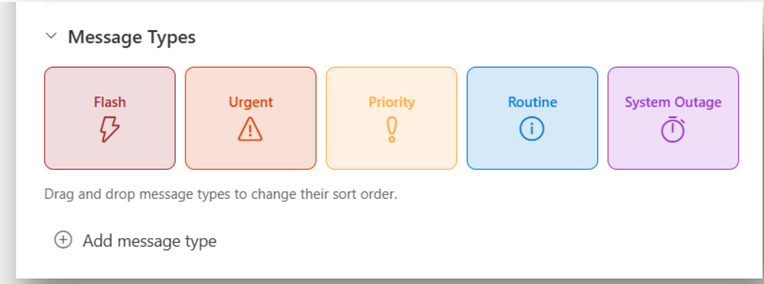


This will display the **Add Message Type Dialog** which is similar to the edit dialog. Provide an appropriate title, colour and icon.



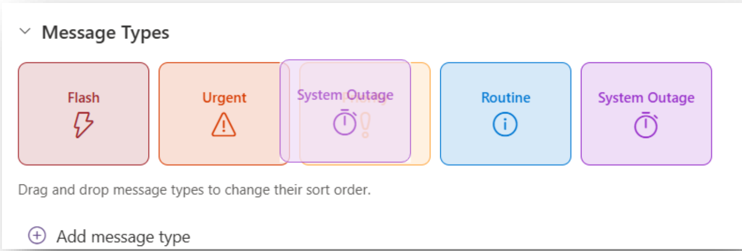
Click the **Save** button to add the new message type.

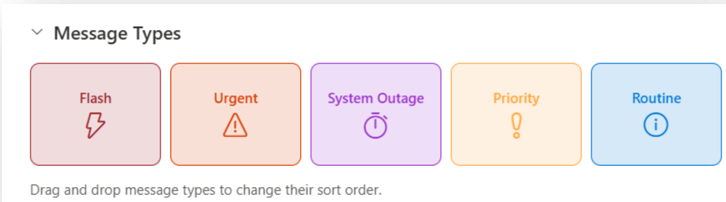
After a few seconds the dialog will close, and the new message type will be shown in the panel.



The order in which the message types are list in the panel will be the same order in which they are presented to users who will create new messages.

You can change the order, just by clicking-holding-and-dragging the item into desired position.

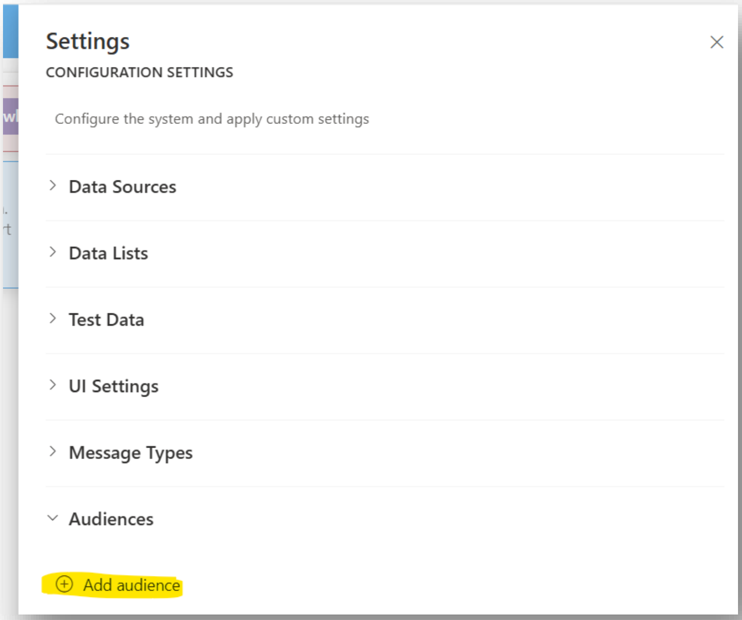




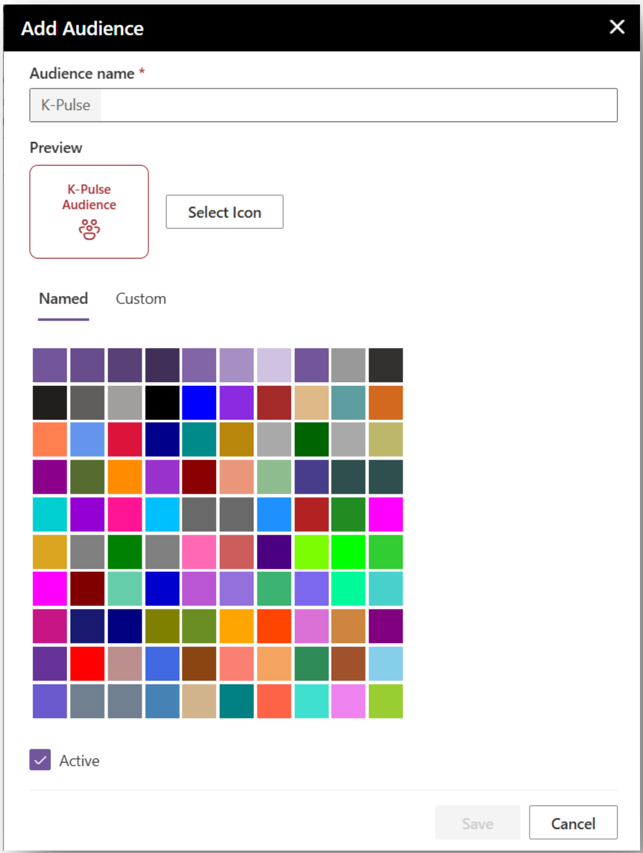
Audiences

As explained previously a **K-Pulse** audience is simple a SharePoint Site Group. Although to be selectable in the new message dialog, the SharePoint Group must be named with the “K-Pulse” as a prefix to the group title.

By default, no custom audiences will exist, but you can use the **+ Add audience** link button to create new audiences

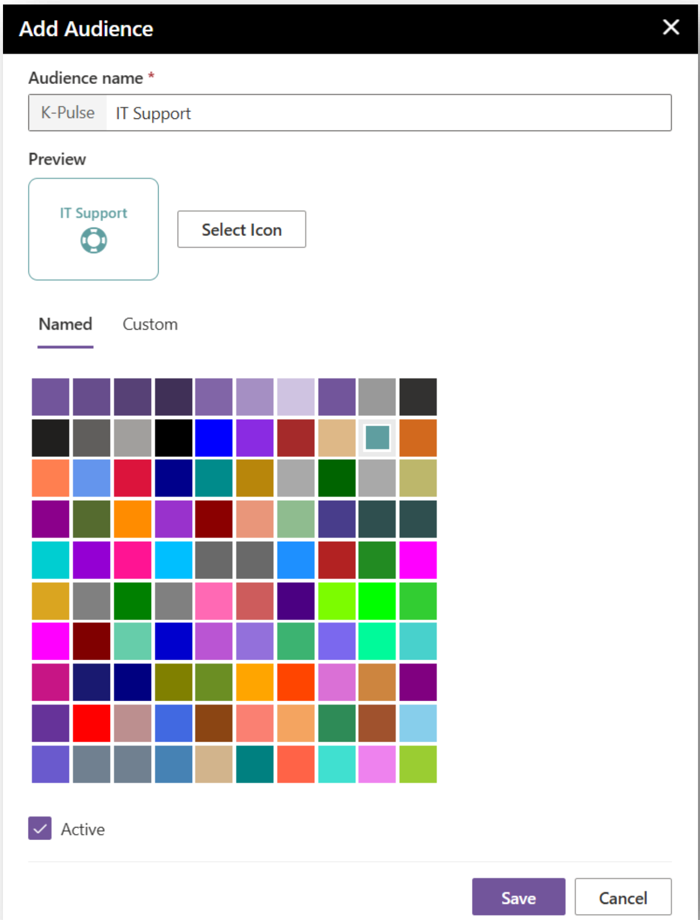


Clicking this link button will display the **Add Audience Dialog**.

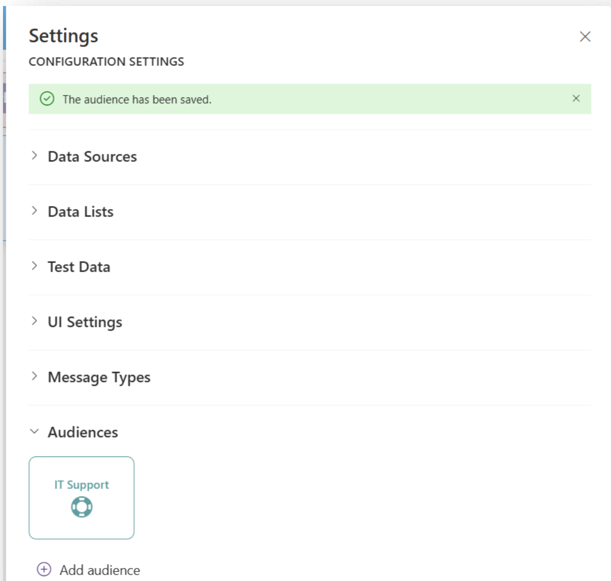


In a way that is similar to creating custom message types, to create an audience you must provide an audience name (the dialog will automatically add the K-Pulse prefix), select and icon and an icon color.

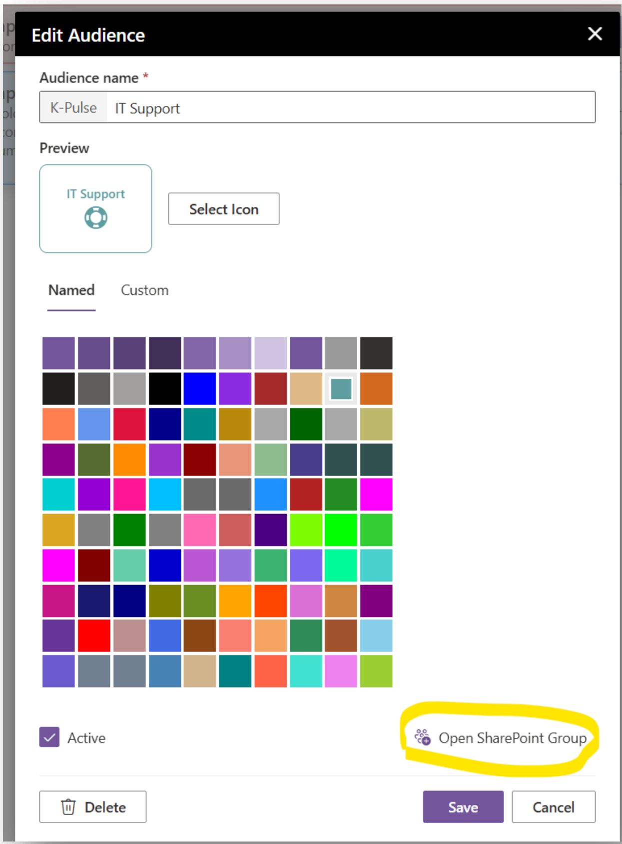
Click the **Save** button to create the new Site Group.



After a few seconds, the dialog will close and the new audience will be listed in the panel section.

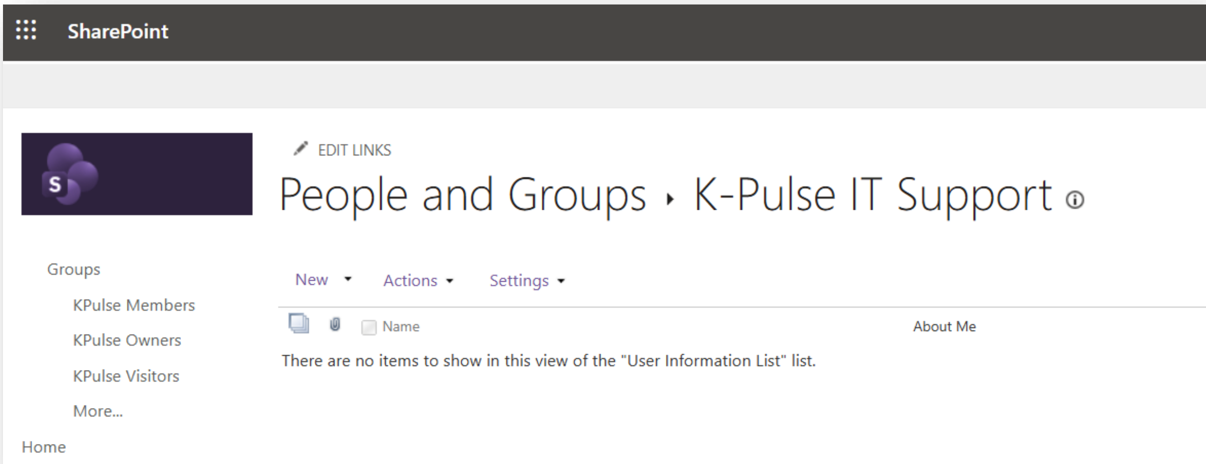


Simply click on the audience tile to open the **Audience Edit Dialog**.



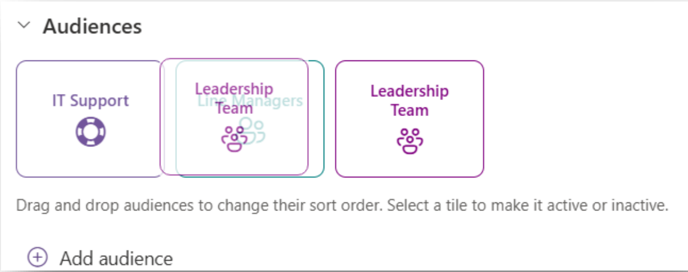
This dialog is similar to the **New Audience Dialog** and can be used to update audience settings.

However, it also provides an **Open SharePoint Group** link button that will open the membership page for the SharePoint Group, in a new browser tab. This button is simply a convenient short cut; you can access the same page via the standard SharePoint web UI if preferred.



As you can see, **K-Pulse** audience SharePoint groups are provisioned as empty containers. It is up to you to add the appropriate users and AD/Entra ID security groups that should be included in the audience.

You may wish to create several audiences and as with message types you can change the sort order simply by dragging them into position.



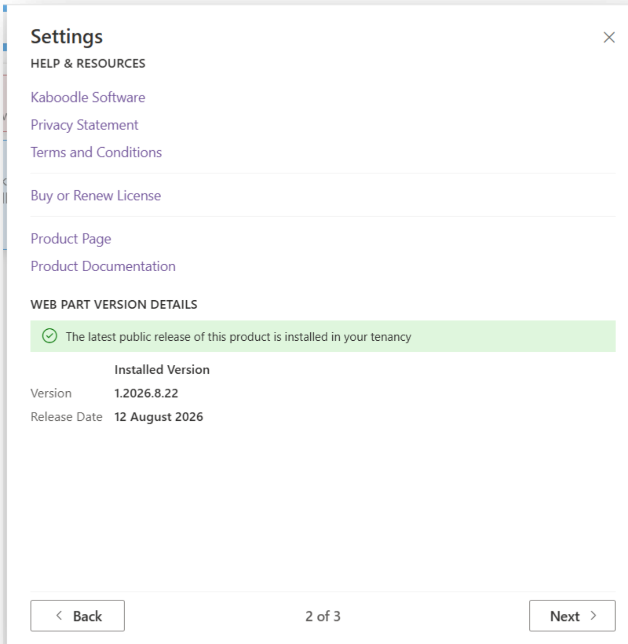
It is important that you understand how audiences work.

If now specific target audience is specified for a message, it will be assumed that the message is intended for all users who have access to the site. More specifically, all users who have at least read-level permissions to the **K-Pulse Messages** list in the site.

However, when one or more audiences are assigned to the message, the message list item is configured with unique permissions such that only users who have membership of the audience groups will have access to the message.

The Help and Resources Page

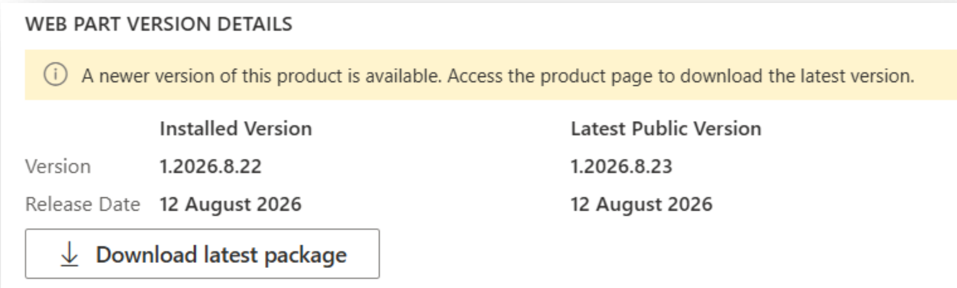
The second page of the **Configuration Pane** provides access to the help and resources.



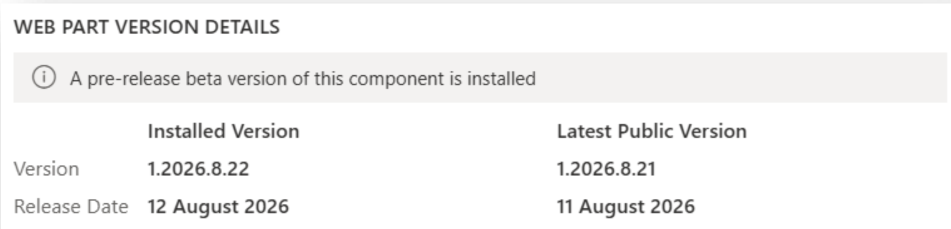
The includes key links to the Kaboodle web site, the product page and the latest product support documentation (this document). It also provides links to purchase or renew a paid license, to unlock **K-Pulse** advanced features.

It also shows which version of the solution is installed in your tenancy and if there is a product update available.

If an update is available, the UI will report the latest product release version and provide a button to download the latest solution package.

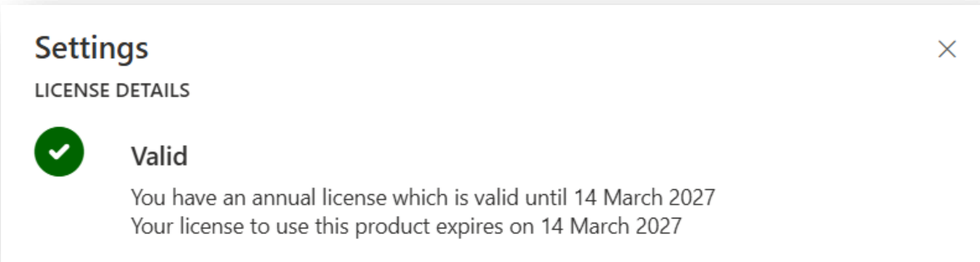


If you have are part of out beta testing program you might also have installed a version that is in advance of a formal release. In which the UI will report that as well:



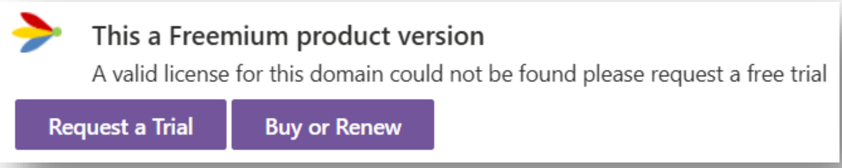
The Licensing Details Page

The 3rd page in the **Configuration Pane** will display your current license status.

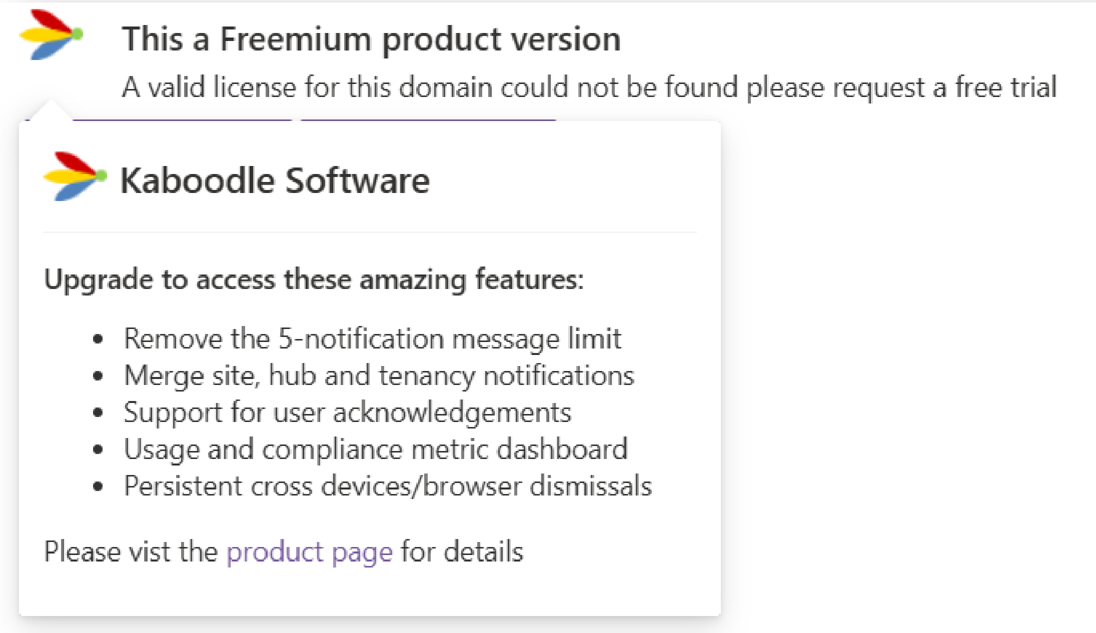


For license paid customers, this includes information about when your license will expire.

If you are using the Freemium version of **K-Pulse** you will see the following:



If you hover over the Kaboodle icon a call-out, it will display the benefits of being a licensed-paid customer.



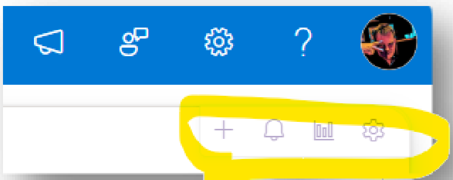
More information about the difference between Freemium and license paid products is provided at the end of this document.

Using K-Pulse

The previous section focused on how to set up and configure K-Pulse. In this section, we provide guidance on how this product is used.

The K-Pulse Mini Toolbar

The **K-Pulse** mini toolbar is displayed on the top-right of every site page and can display up to 4 buttons.

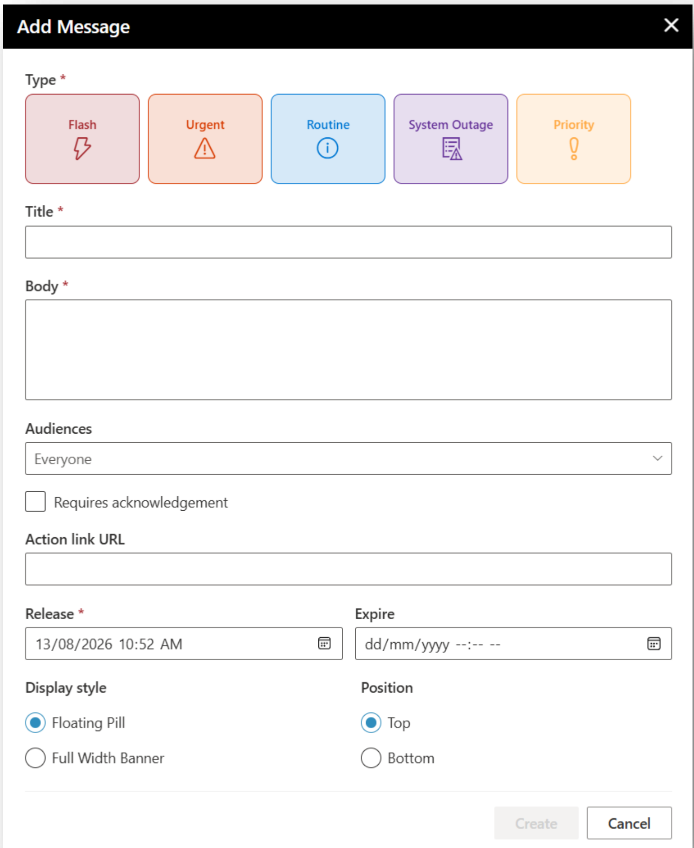


- **Add Message Button**: Used to open the **Create Message Dialog**, to add new messages. This button is only displayed if the current users has the permissions to create new messages.
- **Active Messages Button**: Used to display the **Active Messages Panel** which will list all active messages for the user. This button is only displayed if there are active messages available for the current user, regardless of whether then have been dismissed or acknowledged. Messages are considered active if the current date and time is greater than the **Release**, but less than the **Expire**, date/time column values, as specified in the message item. Note an item without an **Expire** value is considered to never expire.
- **K-Pulse Metrics Button**: Used to access the metrics dashboard. This button is only available:
  - To users with **Full Control** permissions at the site level (site owners/administrators).
  - For license paid customers - this an enhanced premium feature not available to Freemium customers.
  - When a **K-Pulse Metrics** list has been added to the site.
- **Settings Button**: Used to access the **Configuration Pane**, as described in the previous section. This button is only displayed to users who have **Full Control** of the site.

If no button should logically be displayed for a user, the whole toolbar is hidden, i.e. the toolbar is only displayed when it can show buttons to allow user interaction with the system.

Adding Messages

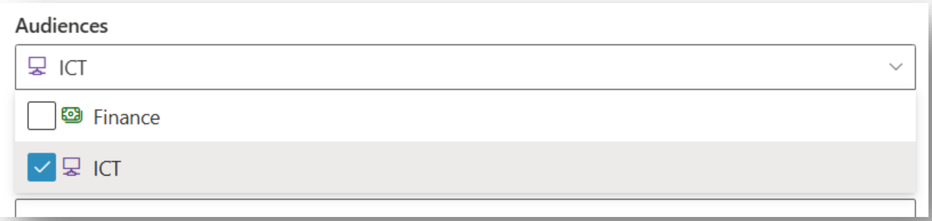
Users who have the permissions to create news messages will have access to the **Add Message Button** on the mini toolbar. Clicking this button will display the **Add Message Dialog** as shown below:



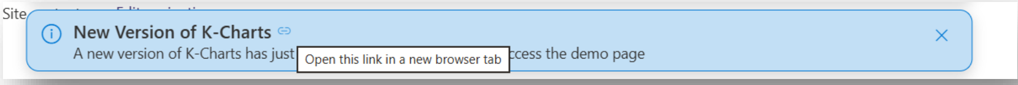
Users simply need to fill out the message details and click the **Create** button to add the message.

The key points to note are:

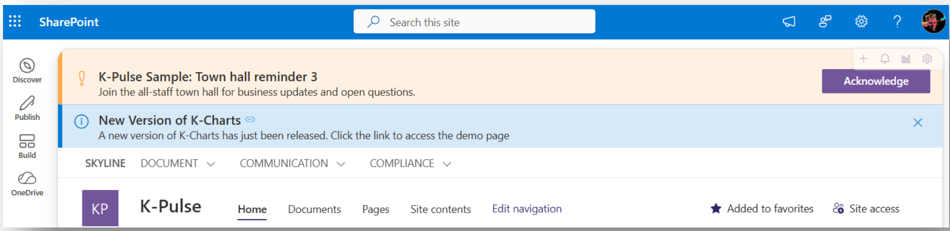
- The **Create** button is only enabled when a valid value has been entered or selected for all required properties of the message.
- These required values are:
  - **Type**: The message type selected by clicking one of the available message type choice buttons.
  - **Title**: A message must have a title.
  - **Body**: A message must have some body text.
  - **Release**: A message must have a release date/time value specified. By default, this is set to the date and time when the dialog was opened and so the message will be displayed immediately. However, you can set this to a date and time in the future so that the message will only be shown to users from that time forward.
- The dialog also contains controls to set the following optional properties:
  - **Audiences**: By default, this property is set to **Everyone** which means that the message will be displayed to all users who have at least read-level access to the **K-Pulse Messages** list. However, if one of more custom audiences have been defined, the message can be targeted so that is only shown to users who are included in those audiences specifically.



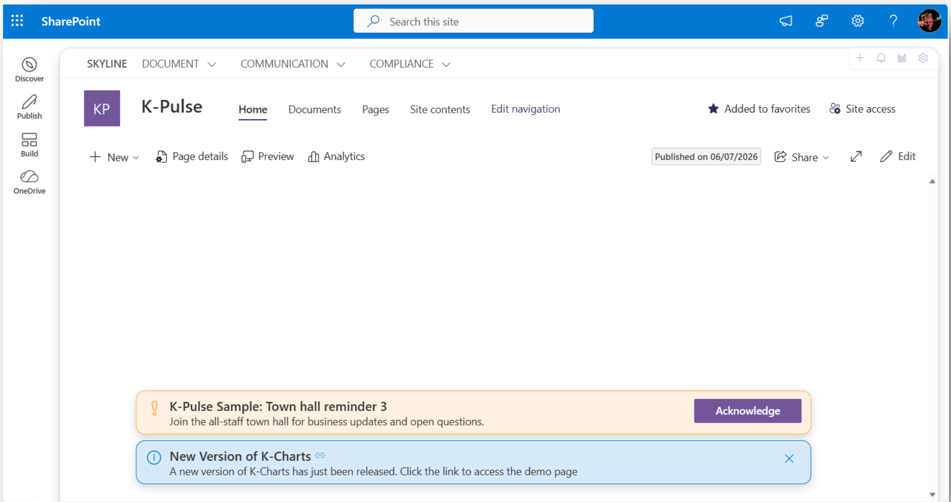
  - **Requires acknowledgement**: The checkbox is unchecked by default. This property is used to specify that the message required user acknowledgement, in place of a simple dismissal, and the checkbox is only displayed:
    - For license-paid customers – user acknowledgements are considered an enhanced feature and it not available to customers who use the Freemium product.
    - If a **K-Pulse Acknowledgements** list has been provisioned.
  - **Action link URL**: You can optionally paste in a hyperlink to any resource that can be accessed by a valid URL. When a URL is provided, the message title will be rendered as a link which users can click to open the linked resource in the current browser windows. It also renders a small link icon next to the header. When users click on this icon (rather than the header) the linked resource will open in a new browser tab.



- **Expire**: By default, a message is not set with an expiry date which means that it will continue to be displayed to users until such time as the dismiss or acknowledge the message. However, you can set an explicit expiry date and time, after which the message will no longer be considered active and so will not be displayed to users, regardless of whether they have dismissed or acknowledged the message. For many routine messages we recommend that you set an expiry value as this will prevent K-Pulse displaying stale or irrelevant messages say when a user returns from leave.
- **Display Style**: The default display style is **Floating Pill**, but you can change this to **Full Width Banner** if preferred. The display style setting is set at the message level and so it is possible to mix and match both message style. However, we generally advise against this as it makes the UI look cluttered and recommend that you pick one style and stick with it. The screenshot below shows messages rendered in **Full Banner Width** mode.

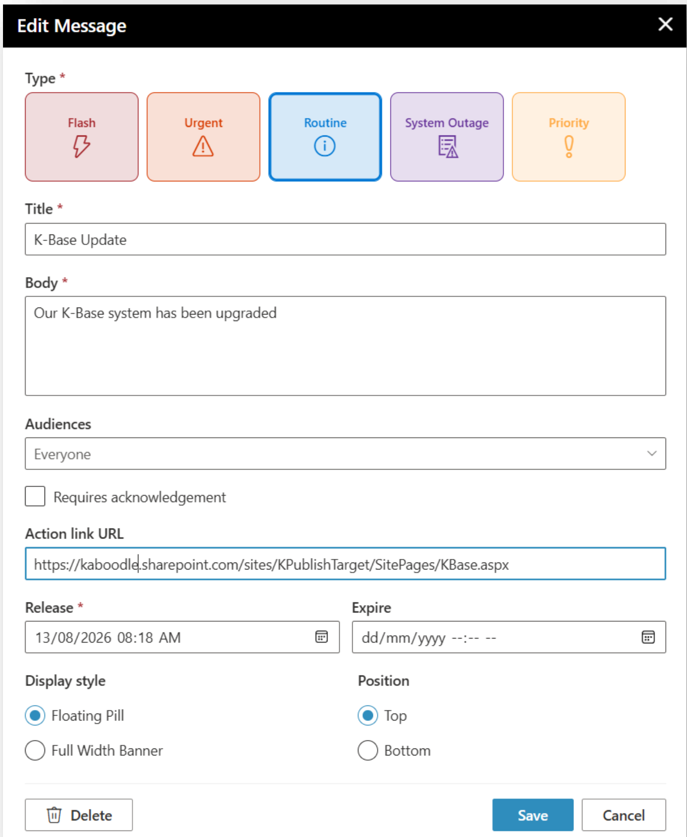


- **Position**: By default, messages are displayed at the top of the screen, but you can set them to display at the bottom if preferred. As with the style, it is possible to mix and match things so that some messages appear at the top and others appear at the bottom but again, this tends to make the UI cluttered and confusing, so we again recommend that you use the position property consistently. The screenshot below shows items rendered at the bottom of the screen.



Editing Messages

Messages can only be edited by users who have the necessary permissions on the **K-Pulse Messages** list. Empowered users can simply double click an active message item to display the **Edit Message** dialog.



Changes can be made to any properties of an active message, simply by using the controls and clicking the **Save** button.

However, care should be taken if acknowledgments are enabled for an active message as some users may have dismissed the message when configured for simple dismissal, and so will not necessarily know that an acknowledgement is now required.

Deleting Messages

Messages can be removed by opening the **Edit Message** dialog and clicking **Delete** button. When the Delete button is clicked, the user will need to confirmation before the message is removed.

Note that delete messages are sent to the recycle bin and can be restored from there, if they were inadvertently deleted by mistake.

Viewing Active Messages

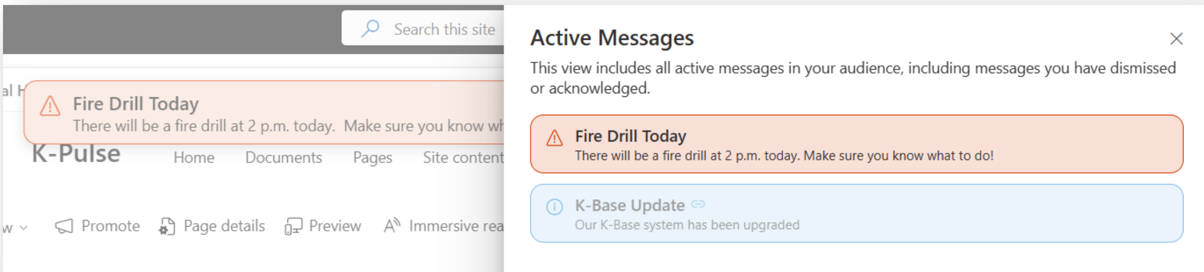
Active messages will be displayed on every standard site page in the site where K-Pulse has been installed until such time as the user dismisses or acknowledges the message or it is inactive i.e. the current date/time is not between the bounds set by the **Release** and **Expire** properties, noting that if the Expire property has not been set with a valid date/time value, the message will be deemed to never expire.

Messages are not limited to being displayed in the site homepage solely, but once they have been dismissed or acknowledged they will no longer be displayed on any page.

Messages are not displayed on system pages or pages managed by SharePoint such as list or library view pages.

Messages are also only displayed when in normal page view mode. The mini toolbar is also hidden when in page edit mode.

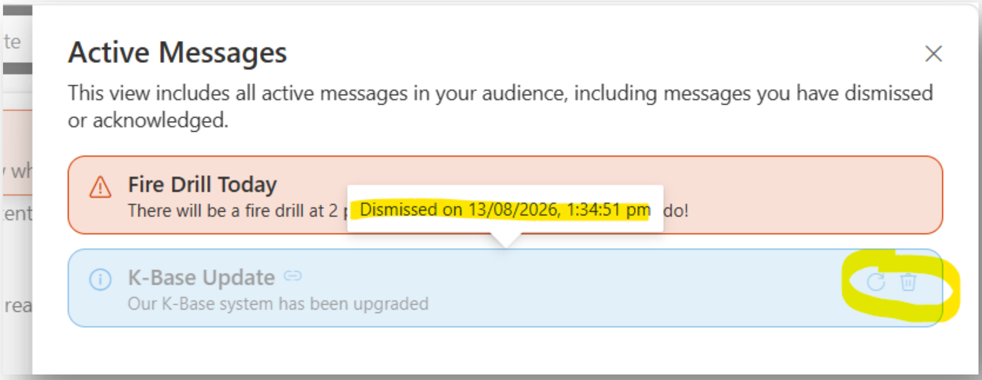
If the user has any active messages, regardless of whether they have been dismissed or acknowledged, the **Active Messages Button** will be displayed on the mini toolbar. Clicking this button will display the **Active Messages Panel** as shown below:



In the above example, the user has not yet dismissed the fire drill alert and so that message will appear both on the site page and in the **Active Messages Panel**.

However, the K-Base Update message appears greyed out and this is because the user has already dismissed this item.

Users can hover over message to display a tooltip which reminds them when they dismissed the message.



The above screenshot also shows 2 buttons are displayed in the message list item:

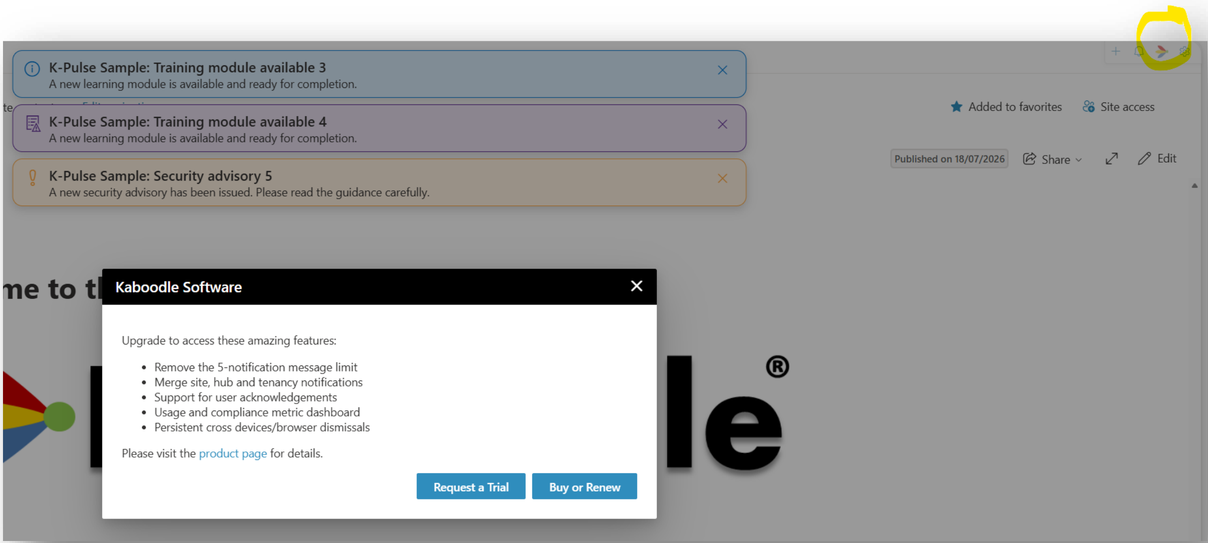
- **Restore Button**: This is shown to all users who have dismissed or acknowledged the message. When clicked the dismissal/acknowledgement is cleared and so the message will once again be displayed on the site page.
- **Delete Button**: The **Delete** button is only displayed if the user has the permissions required to delete the message. As when deleting messages from the **Edit Message** dialog, a confirmation is required before the message is sent to the recycle bin.

The K-Pulse Metrics Dashboard

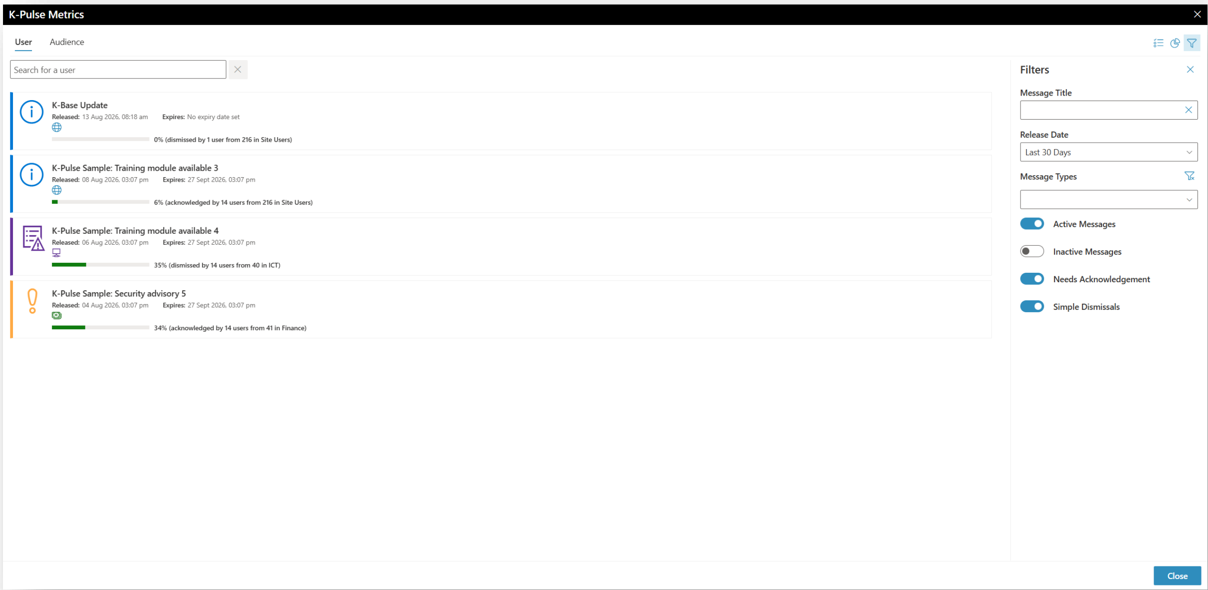
Metrics and usage reporting is an integrated feature of the **K-Pulse** but because it is an enhanced feature, it is only available to license paid customers when **K-Pulse Metrics** list has been provision (as detailed in the **Configuring K-Pulse** section of this document.

If metric are available and enabled, the mini toolbar will display the **K-Pulse Metrics Button**.

For Freemium customers the **Kaboodle Button** is displayed instead of the metrics button, which when clicked displays the **Kaboodle Software** upselling dialog, as shown below:

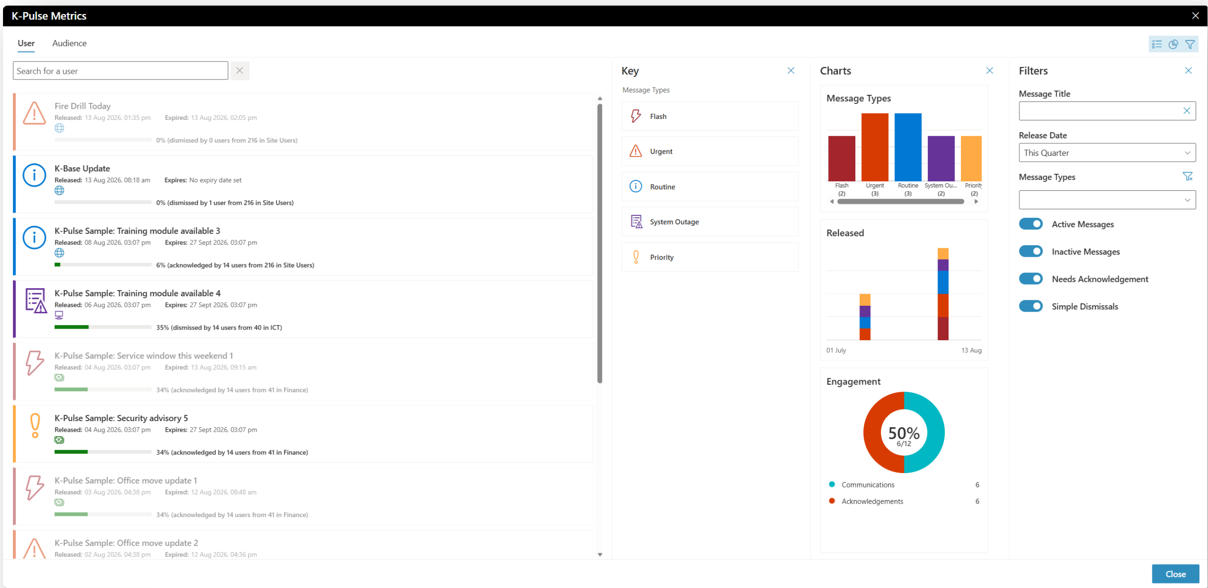


Clicking the **K-Pulse Metrics Button** will open the metrics dashboard in full page panel, as shown below:



When first opened only the filter panel is open, on the right side of the panel. The default filter settings are to display on active messages released within the last 30 days, but you can use controls in the panel to filter which messages are displayed on the left side of the panel.

You can use the mini toolbar to toggle visibility of the charts panel, information panel and filter panel. The screenshot below shows the UI when all 3 panels are displayed.

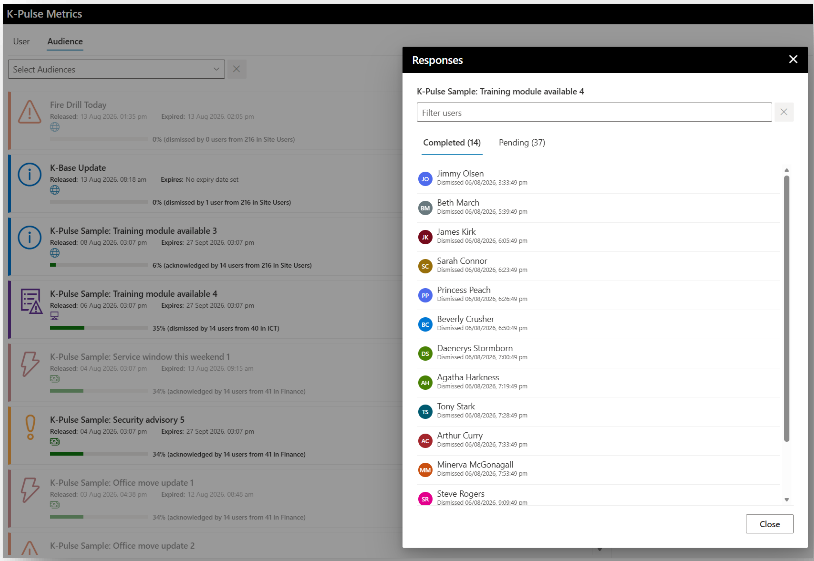


If the filters are set to show inactive messages these will appear greyed out in the list on the left.

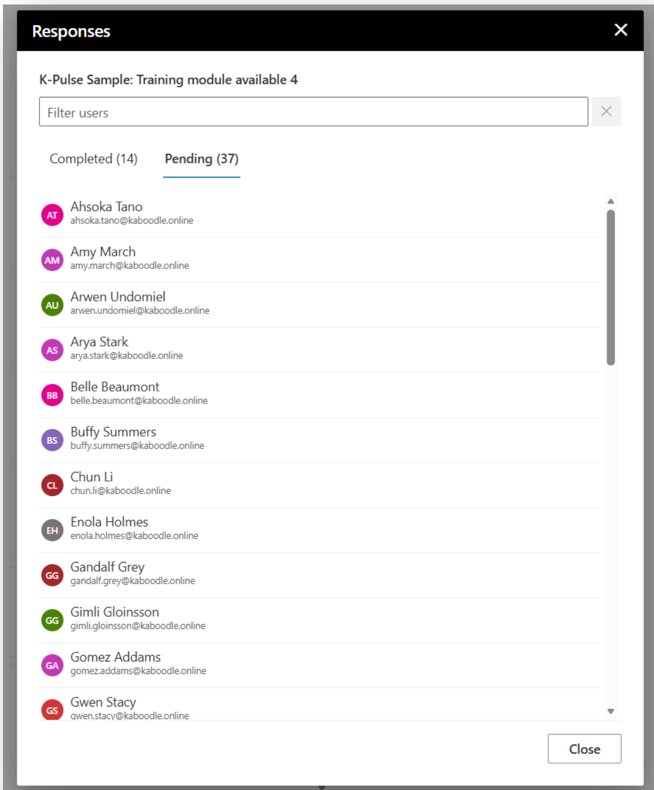
The charts are generated dynamically based on the collection of items selected by the filter settings.

The information panel shows the message types as a key reference table.

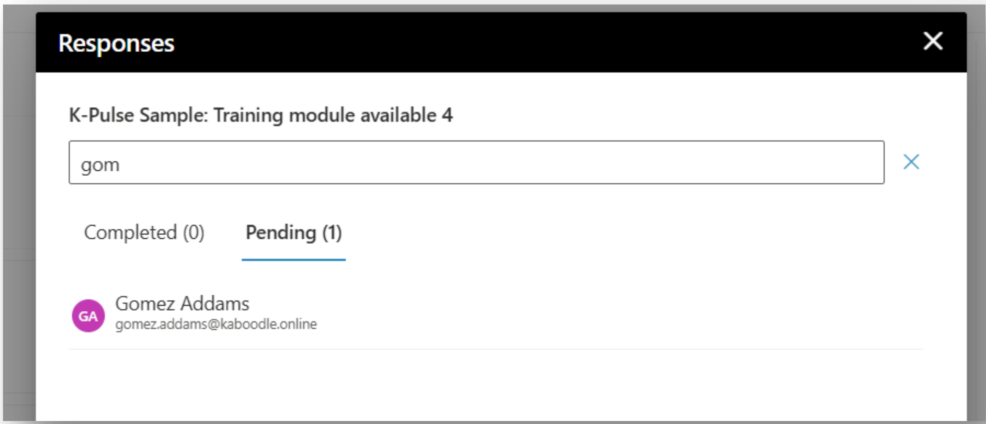
Double click a message to display the **Responses Dialog**, which will provide a list of the users who have dismissed or acknowledges the message, and when they did so.



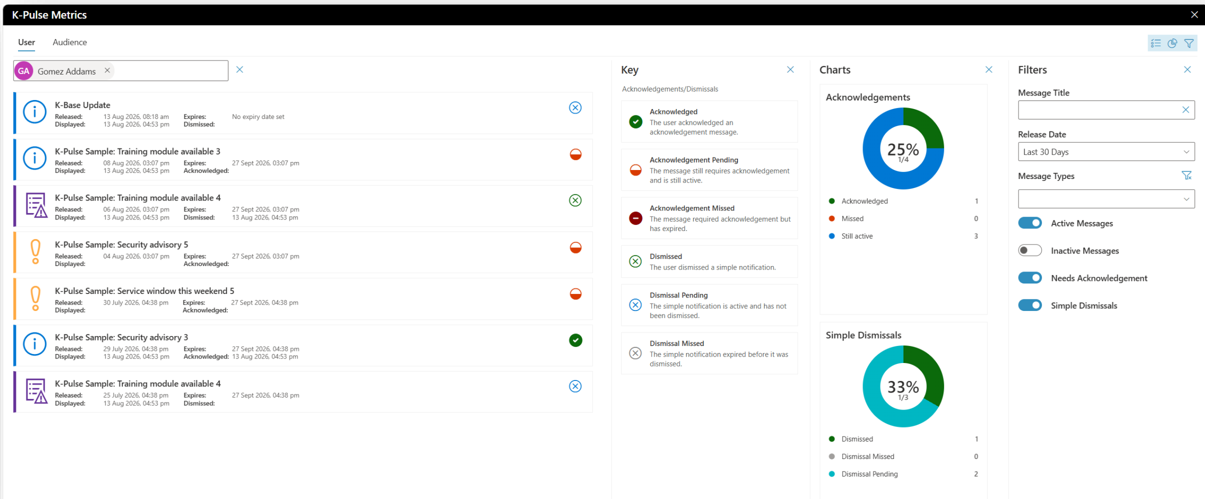
Switch to the **Pending** tab to show users who can access the message, but who have yet to respond.



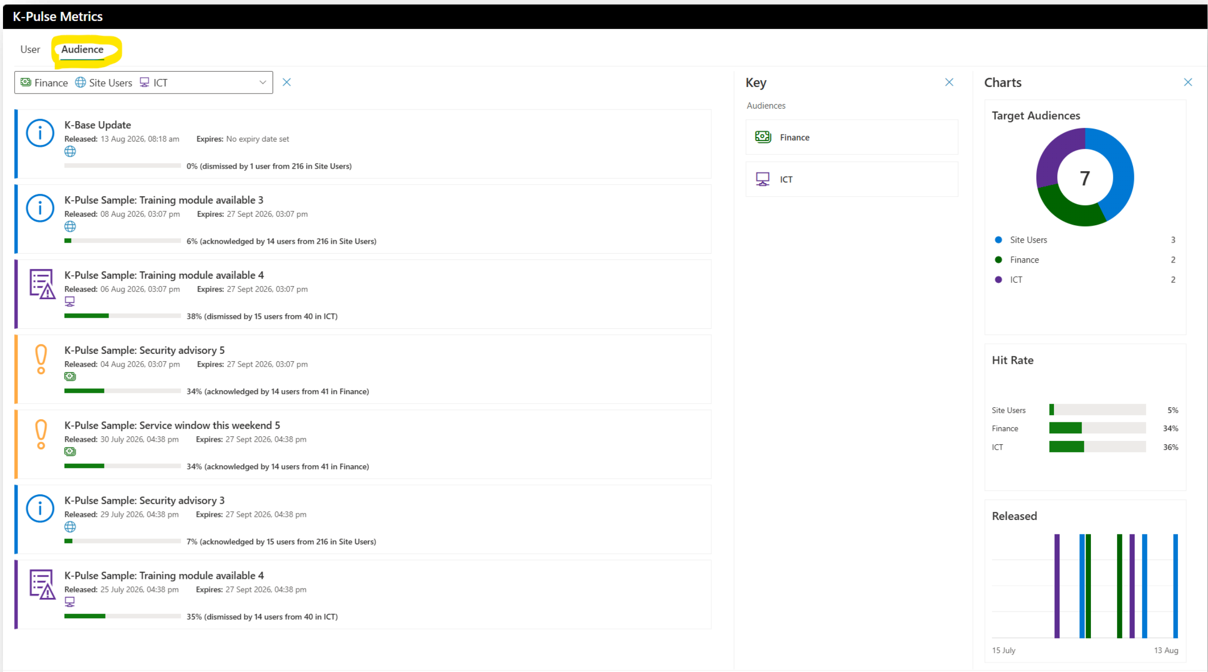
Use the user filter button to check on the response or pending status of specific users.



Use the user picker to view the responses specific users and notice that the information panel key now provides information on the user's response status.



Switch to the Audience tab to filter and view message metrics based on target audiences.



Licensing

K-Pulse is a Freemium product, which means that no licensing or registration is required. Just download, deploy and use. All we ask is that if you find this product useful, please promote it through your social media channels.

Limitations of the Freemium version

The Freemium version of K-Pulse currently has the following functional limitations:

- There is a maximum limit of 5 active notification message. If there are more than 5 active notifications for a user, only the 5 most recently released messages, which have yet to be dismissed, are displayed.
- Messages are displayed from the local site only. Messages are not pulled from other sites such a parent hub site or the SharePoint Home Site.
- User acknowledgements are not supported.
- Usage metrics are not tracked, and no metrics dashboard is available.
- Persistent cross devices/browser dismissals are not supported as this relies on the above listed metrics tacking feature. Instead, dismissals and acknowledgements a held in browser local storage only.

The above list of Freemium limitations is correct as at the time this document was authored but Kaboodle Software reserves the right to change this limitation at any time and without notice.

The active list of limitations will be displayed on the Kaboodle web site and via the **K-Pulse** UI.