

# **Firstbeat**

# **New Lifestyle Assessment**

## **User manual**

June 2016

## Contents

1. System requirements .....	3
2. Getting started .....	4
2.1. Logging in .....	4
2.2. Home page functions .....	5
2.3. Firstbeat Uploader plugin installation.....	8
2.4. Firstbeat Uploader installation .....	10
3. Individuals .....	12
3.1. Creating a new lifestyle assessment .....	12
3.2. Checking a device .....	14
3.3. Client information (client fills).....	19
3.3.1. Pre-questionnaire .....	21
3.3.2. Personal information .....	22
3.3.3. Journal.....	23
3.3.4. Goals.....	26
3.4. Upload and edit measurements.....	27
3.5. Creating reports .....	38
3.6. Customer survey .....	42
4. Lifestyle Assessment with Firstbeat Center .....	44
4.1. Lifestyle assessment to individuals .....	44
4.1.1. Creating lifestyle assessment.....	44
4.1.2. Device order .....	45
4.1.3. Actions after the measurement.....	47
4.2. Lifestyle assessment to a group .....	48

## Introduction

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

In the new Lifestyle Assessment, you can conduct individual assessments. Group assessments still need to be conducted in the old Lifestyle Assessment. Both servers function concurrently, so you can sign-in in the same address ([www.lifestyleassessment.com](http://www.lifestyleassessment.com)) and with the same credentials. Also the same profiles and measurements are found in both the new and old Lifestyle Assessment.

### Partner Extranet

([www.firstbeat.com/partner-extranet](http://www.firstbeat.com/partner-extranet)):

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

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

### The credentials to Partner Extranet

Username: Firstbeatpartner

Password: Wellness

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

In Firstbeat Lifestyle Assessment -related questions, please contact Firstbeat support via email: [support@firstbeat.fi](mailto:support@firstbeat.fi) or via phone: +358 20 7631 664 (Mon – Fri 9 am to 4 pm GMT + 2). From our web pages you can also find our support site:

[www.firstbeat.com/support/](http://www.firstbeat.com/support/)

## 1. System requirements

Works in Windows 2000, XP, Vista and 7 operating systems

(Win 98 and ME operating system functionality has not been tested)

RAM memory at least 512 MB

Processor speed minimum 1 GHz

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

Free hard disk drive space at least 50 Mb

Software: Adobe Acrobat Reader 5.0 or newer

USB port

Internet connection

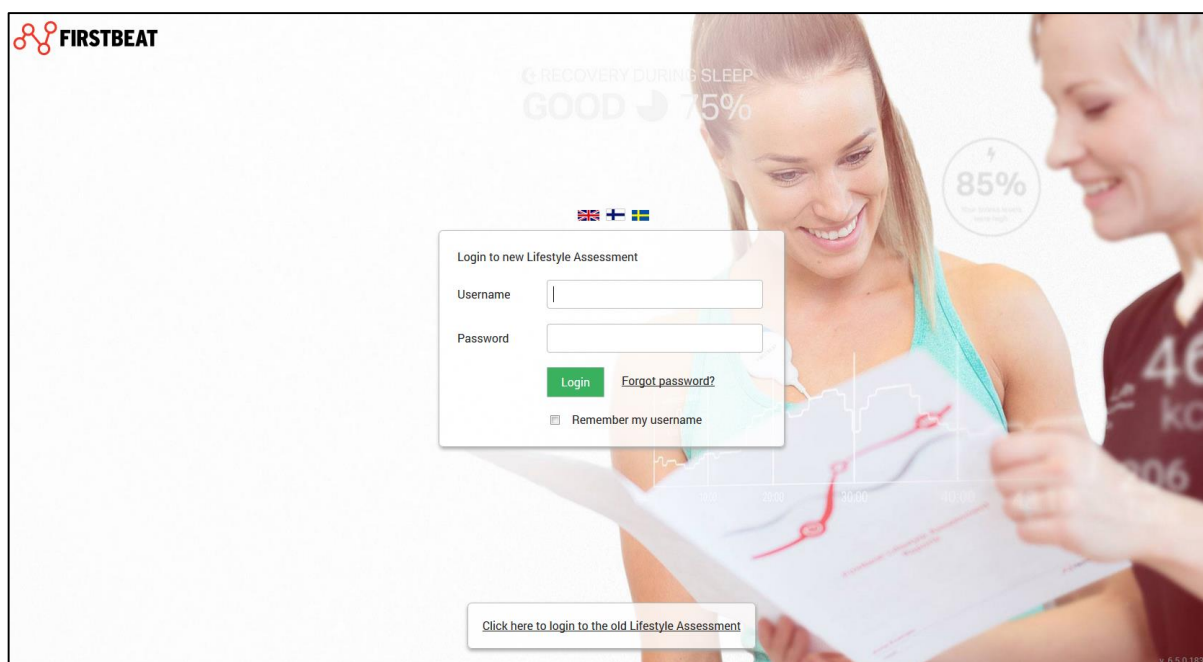
Compatible devices:

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

## 2. Getting started

### 2.1. Logging in

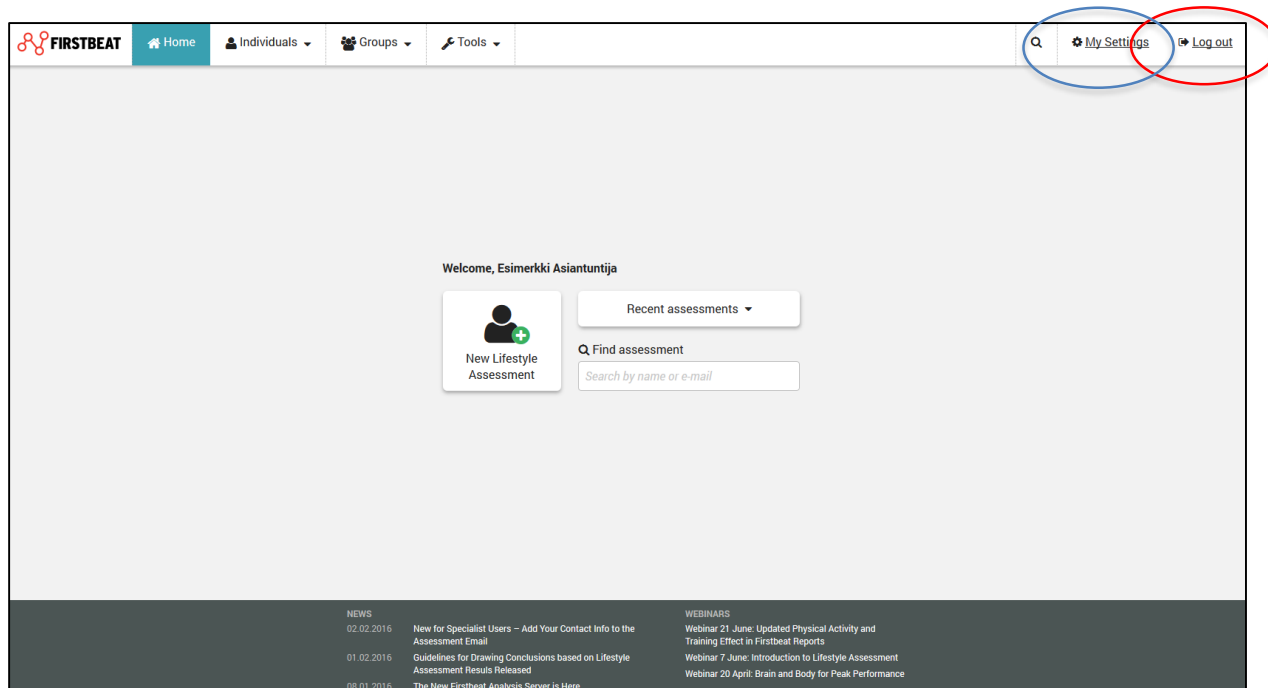
You can log in to the Firstbeat Lifestyle Assessment at [www.lifestyleassessment.com](http://www.lifestyleassessment.com). You will need personal login credentials, which will be sent to you via email when you purchase access to the account. Write the user name and password to the appropriate fields.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



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

## 2.2. Home page functions

The home page of the Lifestyle Assessment provides access to all the functions that are required for conducting Lifestyle assessments or downloading programs. You can logout from the upper right corner of the home page (circled in red on the picture). If you wish to change the settings of your own user account, select *My settings* (circled in blue).



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

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

In the *Settings* tab you can select the time zone and desired date format. You can also choose if you want to create Physical Workload report only from worktime and if the Training Effect boxes should be shown on the Lifestyle Assessment reports.

My settings

Person information Settings

Timezone Europe/Helsinki

Date format 17.12.2015 17 Dec 2015

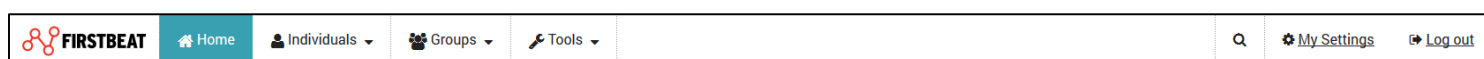
☐ Create Physical Workload report from worktime only

☐ Show the Training Effect boxes on the Lifestyle Assessment reports

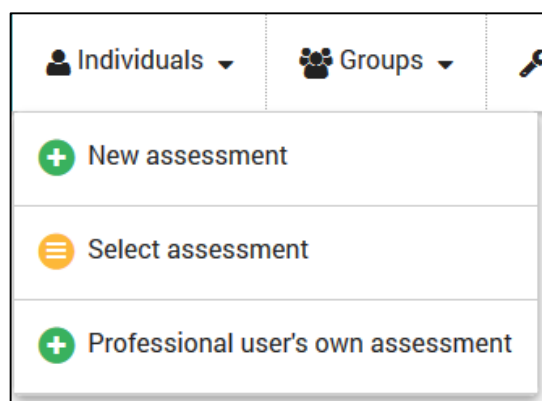
Save Cancel

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

On the top of the main page you will find a navigation bar. *Home* tab allows you to return to the main page in any time.

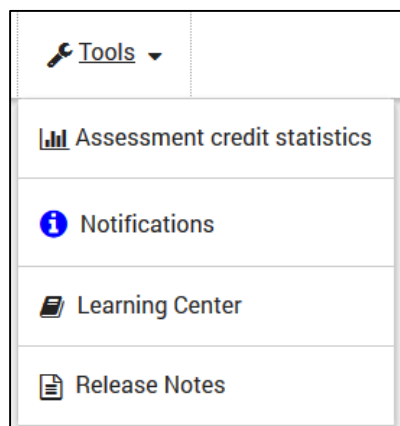


You can start a new assessment, select an assessment or start a measurement on yourself under the *Individuals* tab.



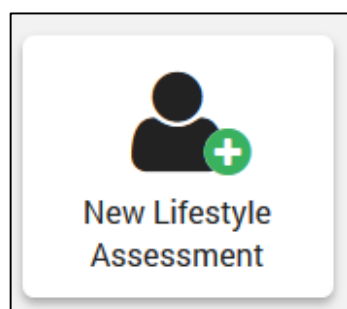
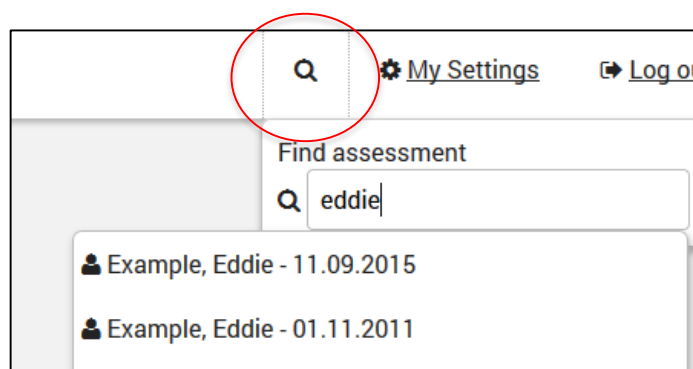
Via the *Groups* tab you will be able to log in to the old Lifestyle Assessment in order to create and modify group assessments.

Via Tools tab you can check your account's assessment credit statistics and possible notifications, sign in to Learning Center and check the latest release notes.

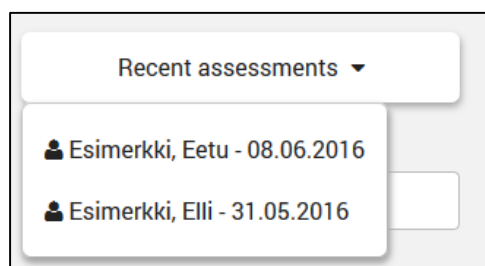


*Note! New notifications related to your assessments will be shown also in the main page of the Lifestyle Assessment. Notifications will be given for example when our clients measurement has been uploaded to server and it needs to be analyzed.*

Magnifying glass tab lets you search lifestyle assessments from the server. When you write the name of your customer to the search field, the server lists all the assessments and the reports with that name.

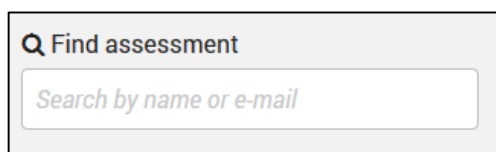


*New Lifestyle Assessment tab allows you to create a new assessment either to a new or already existing customer. More about the assessment creation can be read from chapter 3 Individuals.*



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





*Find assessment* field can be used in the same way than the magnifying class tab in the navigation bar.

## 2.3. Firstbeat Uploader plugin installation

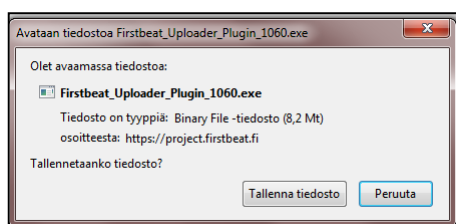
Firstbeat Uploader Plugin is required for preparing devices and uploading data from Firstbeat Bodyguard 2 directly in the Lifestyle Assessment server. The Plugin tool is downloaded from our web pages and takes app. 5 minutes, depending on your internet speed.

The installation packages of Firstbeat Uploader Plugin can be found here:

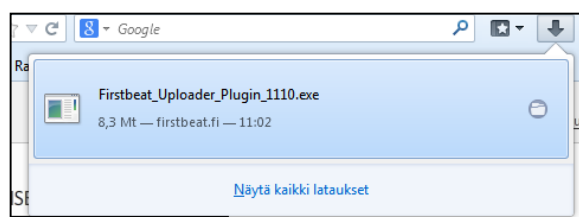
<http://www.firstbeat.com/partner-extranet/software-downloads/>

The packages can be found also with following bath: [www.firstbeat.com](http://www.firstbeat.com) > Support > Bodyguard 2 HRV Recorder > Downloads > Software downloads

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



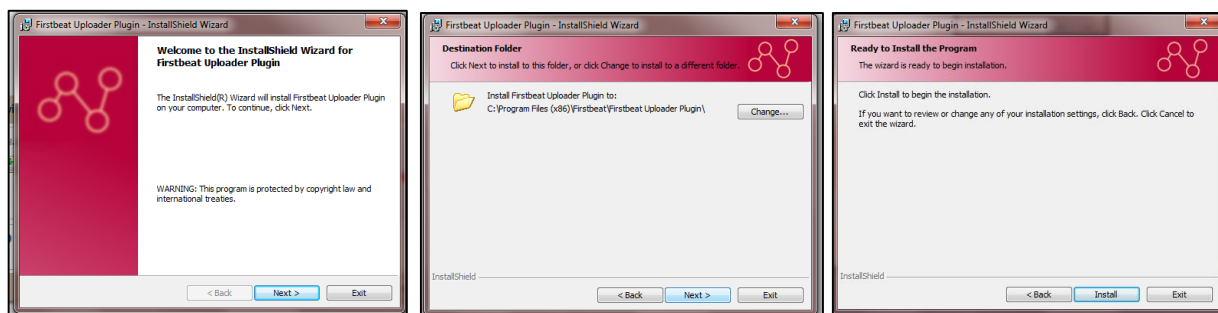
The file is downloaded to your computer and checked for viruses. If the file does not open in its own window, the computer's default is that the downloaded files are saved in the *Downloads* folder. If necessary, open this folder and bring the mouse cursor on top of the name *Firstbeat Uploader Plugin*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



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

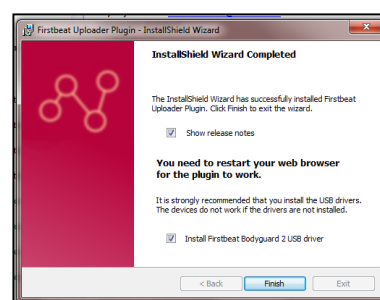
*Note! The steps of installation may vary a bit depending on the browser you are using.*

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



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

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



## 2.4. Firstbeat Uploader installation

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

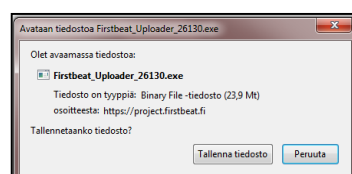
The Plugin tool is downloaded from our web pages and takes app. 5 minutes, depending on your internet speed.

The installation packages of Firstbeat Uploader Plugin can be found here:

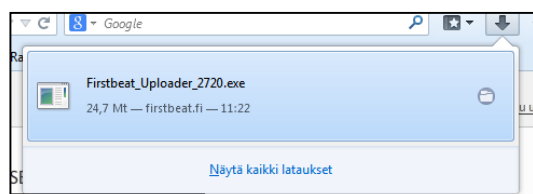
<http://www.firstbeat.com/partner-extranet/software-downloads/>

The packages can be found also with following bath: [www.firstbeat.com](http://www.firstbeat.com) > Support > Bodyguard 2 HRV Recorder > Downloads > Software downloads

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

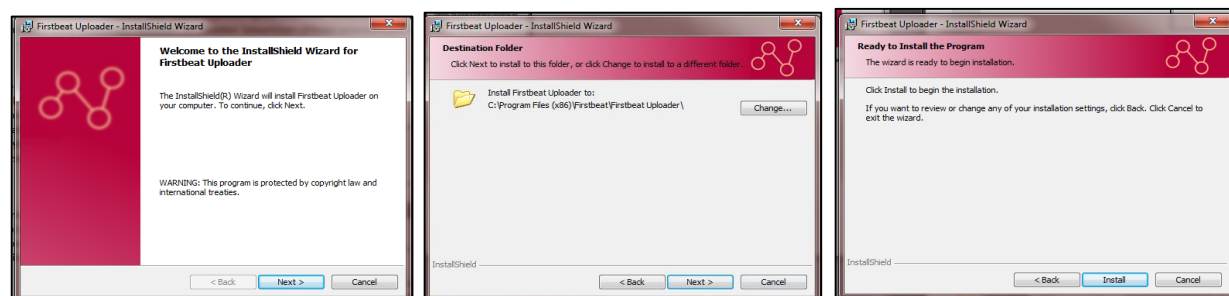


The file is downloaded to your computer and checked for viruses. If the file does not open in its own window, the computer's default is that the downloaded files are saved in the *Downloads* folder. If necessary, open this folder and bring the mouse cursor on top of the name *Firstbeat Uploader* and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

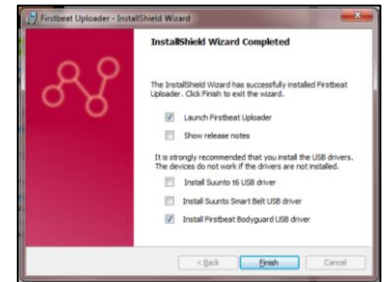


In some cases, you will get a window informing you that an unknown program wants to use your computer. In this case, select *Allow*. The computer then asks you if you want to start the application.

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

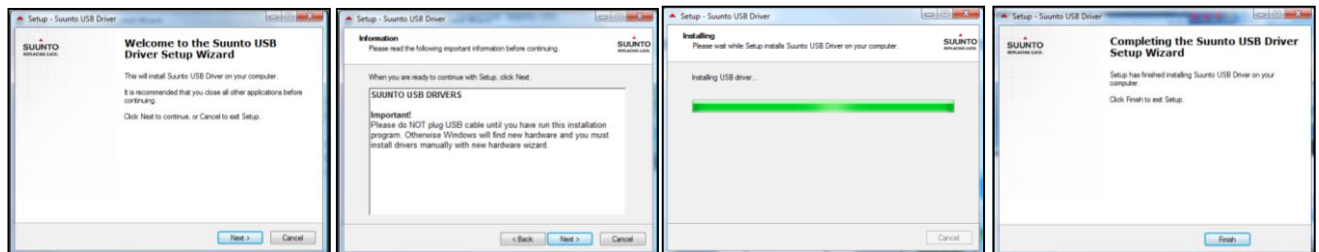


The next window allows you to choose which device drivers to install. The recommendation is to install all drivers to allow you to upload data from all possible devices. At the same time, you can choose whether to launch the Uploader after the installation and if you want to open the Release notes. When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



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

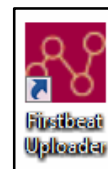
When the installation window opens, press *Next* in the next 2 windows. Please also note that **you should not plug in the device's USB cable** before the installation is completed. The Suunto driver installation is completed when the installation bar in the window is all green. In the end press *Finish*.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



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

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

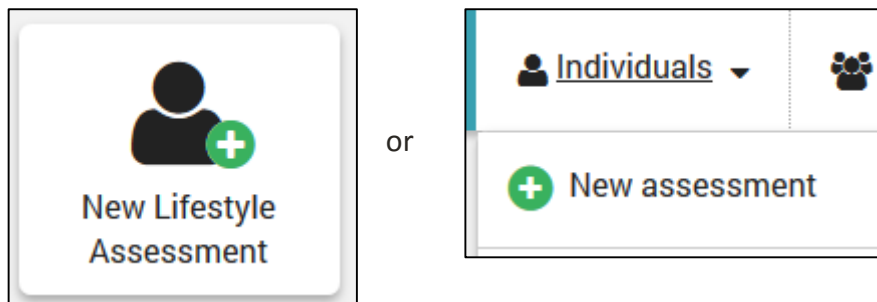
The shortcut to Firstbeat Uploader is now on your computer's desktop, allowing you to start it there whenever you need to.



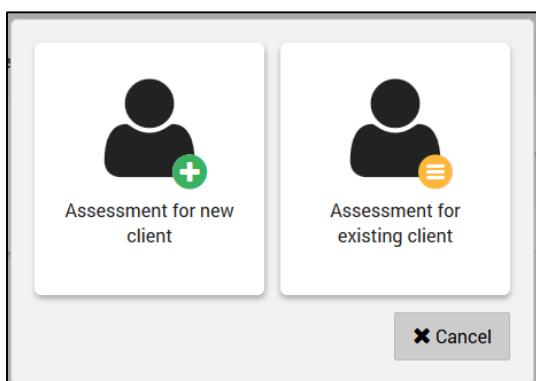
### 3. Individuals

#### 3.1. Creating a new lifestyle assessment

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



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



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

The image shows a form titled 'Assessment details'. It contains the following fields and options:

- First name**: Text input field.
- Last name**: Text input field.
- Language**: Dropdown menu with 'Finnish' selected.
- E-mail**: Text input field.
- Link will be sent on**: Date picker with 'Today' selected.
- Link expires on**: Date picker with '28.06.2016' selected.
- Use Firstbeat Center**: Checkbox (unchecked) and a help icon.

At the bottom right are two buttons: '+ Create' (green) and 'X Cancel' (grey).

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

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

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



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

Name	E-mail
Example, Eddie	

Yes, create for selected client    No, create new client    X Cancel

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

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

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

With the arrows on the sides (marked with red) or with the steps on the bottom border of the view, you are able to move across the assessment tasks.

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

### 3.2. Checking a device

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

The checking

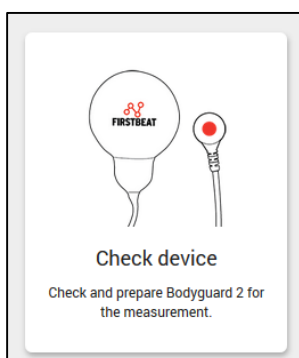
- confirms that the device has not been reserved for another assessment
- sets the device to the right time
- empties the device memory
- check that the battery of the device is full

- reserves the device to the desired assessment

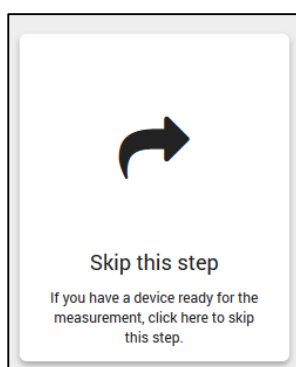
The checking steps differ depending on whether you are using Bodyguard or Bodyguard 2; below you will find the instructions for both. Bodyguard 2 can be prepared in either way.

### 3.2.1. Firstbeat Bodyguard 2

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



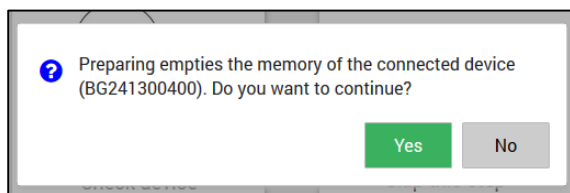
If you have already prepared some device to the assessment (for example with Uploader), select *Skip this step*.



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

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



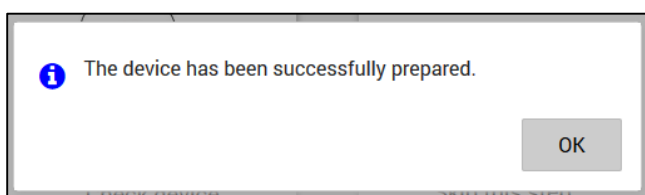


If you have already uploaded the measurements in the device and the device memory can be emptied, choose *Yes*. The preparation process will continue.

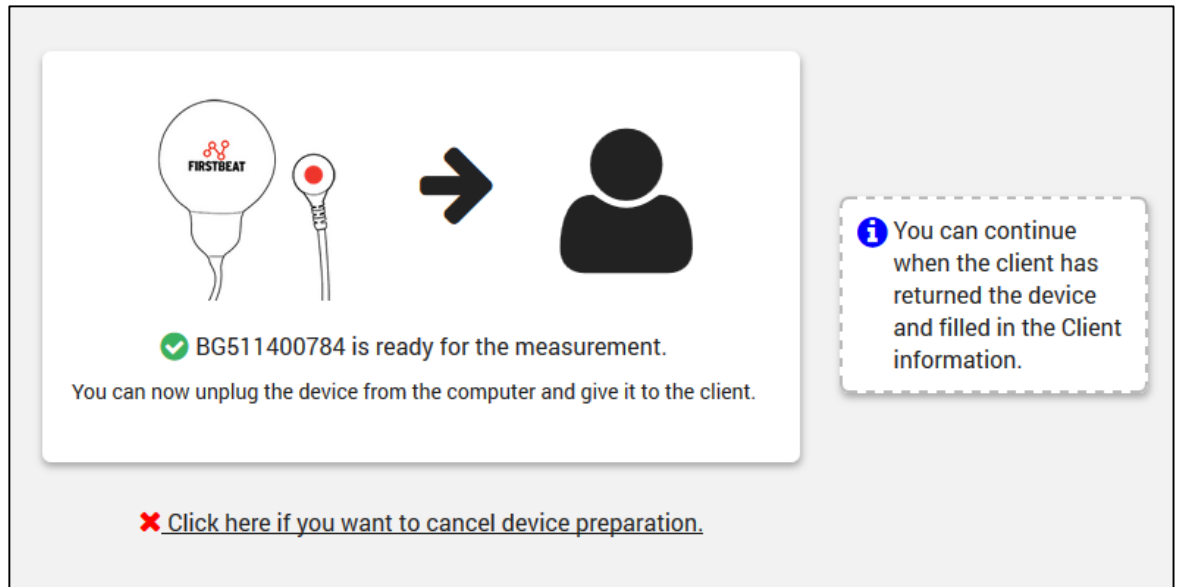
If you have not yet uploaded the measurements in the device or you do not want the device memory being emptied for some other reason, choose *No*. The preparation process will be discontinued.




4. The program automatically starts to prepare the found device for the assessment that is open.
5. During the preparation process, the program also checks the battery charge of the device. If the battery is not fully charged, you will get a notification message (below):

When the preparing is ready, click *OK*.



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



✔ BG511400784 is ready for the measurement.  
You can now unplug the device from the computer and give it to the client.

**i** You can continue when the client has returned the device and filled in the Client information.

✗ [Click here if you want to cancel device preparation.](#)

### 3.2.2. Firstbeat Bodyguard

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

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

*Note!*

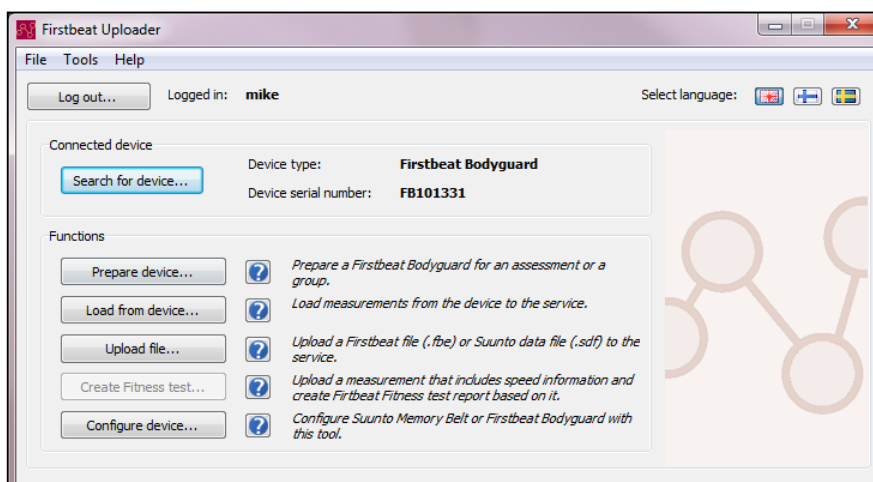
*If you have not yet installed the Uploader on your computer, you can install it from our web pages and following the installation instructions (page 11).*



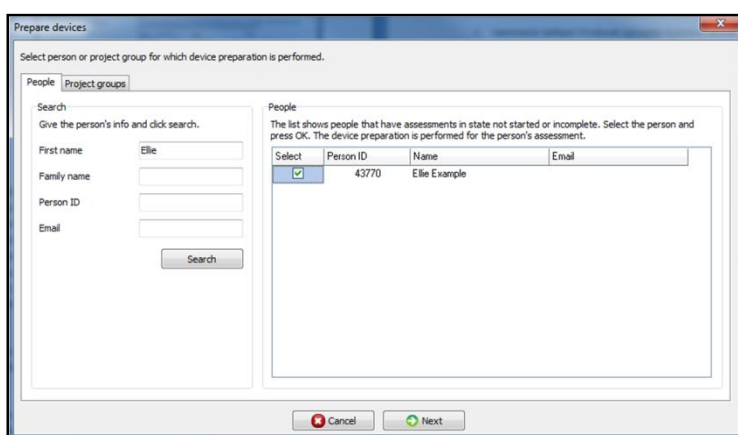
- The Uploader will open a sign-in window. Sign in to Uploader with the same username and password that you used to sign in to the Firstbeat Lifestyle Assessment.



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

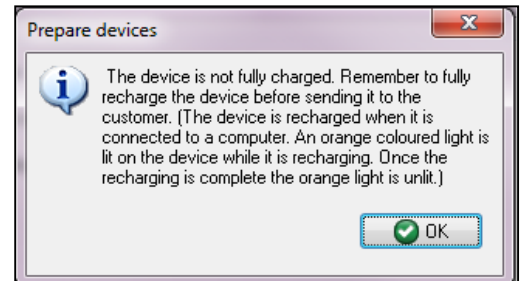


3. From the list that opens, select the person for whom you wish to prepare the device and press *Next*. If only one assessment has been made for this person, the Uploader will select it automatically.

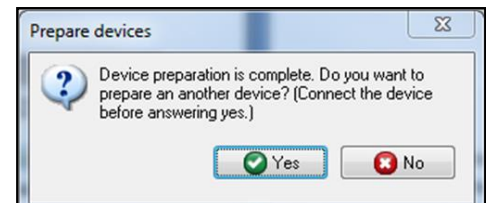


4. Uploader will run through the preparation steps automatically. The steps include setting the clock, emptying the device's memory and reserving the device. If the device is not fully charged, the Uploader will remind you to charge the battery.

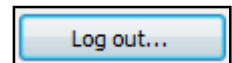
*Note! The device has been charged long enough when the orange led has turned off. Charging the battery takes 1-2 hours, depending on earlier charge.*



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



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

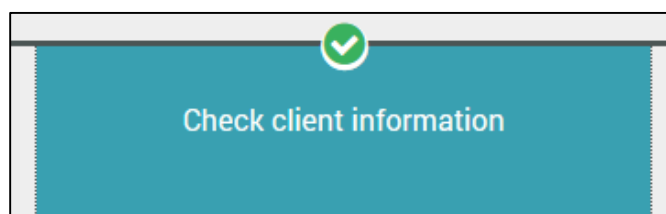


### 3.3. Client information (client fills)

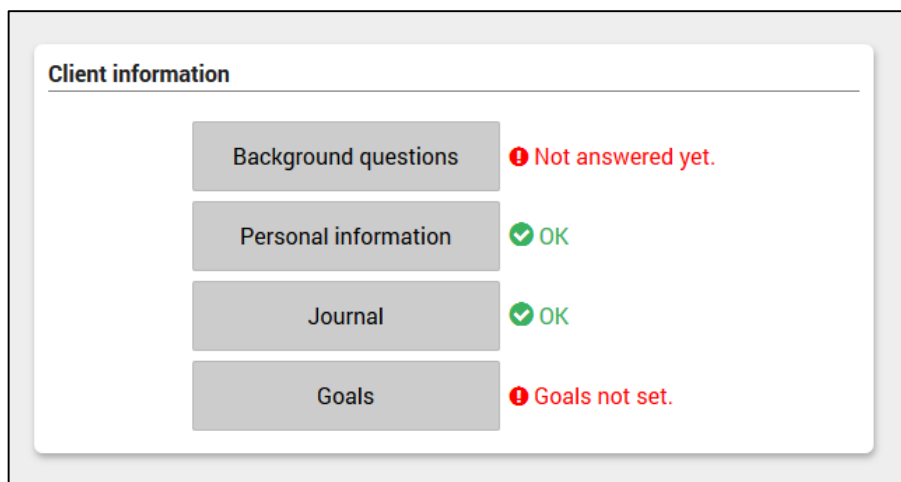
On the first day of the Firstbeat Lifestyle assessment the client will receive an email message from service@firstbeat.fi with a link for filling out the pre-questionnaire, personal information, journal during the measurement days and goals. If an email is not sent (i.e. the client's email address has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

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

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



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



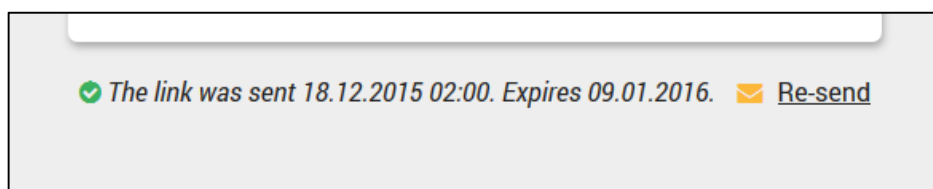
The image shows a 'Client information' progress bar with four steps: Background questions, Personal information, Journal, and Goals. Each step has a status indicator to its right.

Step	Status
Background questions	❗ Not answered yet.
Personal information	✅ OK
Journal	✅ OK
Goals	❗ Goals not set.

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

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

*Note! If you want to re-send the link to the personal information and journal to your customer, it can be done in the Start assessment step.*



The image shows a notification box with a green checkmark icon and the following text: 'The link was sent 18.12.2015 02:00. Expires 09.01.2016. 📧 [Re-send](#)'

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

### 3.3.1. Pre-questionnaire

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

<b>1/10. I think I am physically active enough to get health benefits.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>2/10. I think my physical activity is intensive enough to improve my fitness.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>3/10. In my opinion, my eating habits are healthy.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>4/10. I feel that my alcohol consumption is not excessive.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>5/10. I don't generally feel stressed.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input checked="" type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>6/10. My days include breaks that allow me to recover.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>7/10. I usually feel rested and energetic.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>8/10. I feel that I sleep enough.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>9/10. I feel that I can influence the things that affect my health.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
<b>10/10. In my opinion, I feel well at the moment.</b>				
<input type="radio"/> Completely agree	<input type="radio"/> Partially agree	<input type="radio"/> Cannot say	<input type="radio"/> Partially disagree	<input type="radio"/> Completely disagree
				<input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/>

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

Pre-questionnaire	<input checked="" type="button" value="OK"/>
-------------------	--

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

Pre-questionnaire	<input checked="" type="button" value="Answers missing."/>
-------------------	--

### 3.3.2. Personal information

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

Personal information
✔ OK

First name	<input type="text" value="Eddie"/>
Last name	<input type="text" value="Example"/>
Date of birth	<input type="text" value="3"/> <input type="text" value="Sep"/> <input type="text" value="1976"/>
Gender	<input type="text" value="Male"/>
Height	<input type="text" value="183"/> <input type="text" value="cm"/>
Weight	<input type="text" value="93"/> <input type="text" value="kg"/>
Min. heart rate	<input type="text" value="38"/> <span>beats/minute</span>
Max. heart rate	<input type="text" value="188"/> <span>beats/minute</span>
Job classification	<input type="text" value="Not defined"/>

**Estimate your aerobic fitness:**

☐ Poor I don't exercise or I exercise very little.

☐ Moderate I exercise occasionally / randomly.

☒ Good I exercise regularly and some of my exercise is of high intensity.

☐ Top-level I am a competitive athlete.

**Long-term illnesses**

Seasonal asthma medication

✔ Save

✕ Cancel

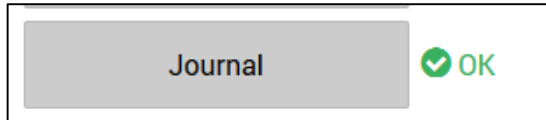
Required information is date of birth, gender, height, weight and estimate of aerobic fitness.

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

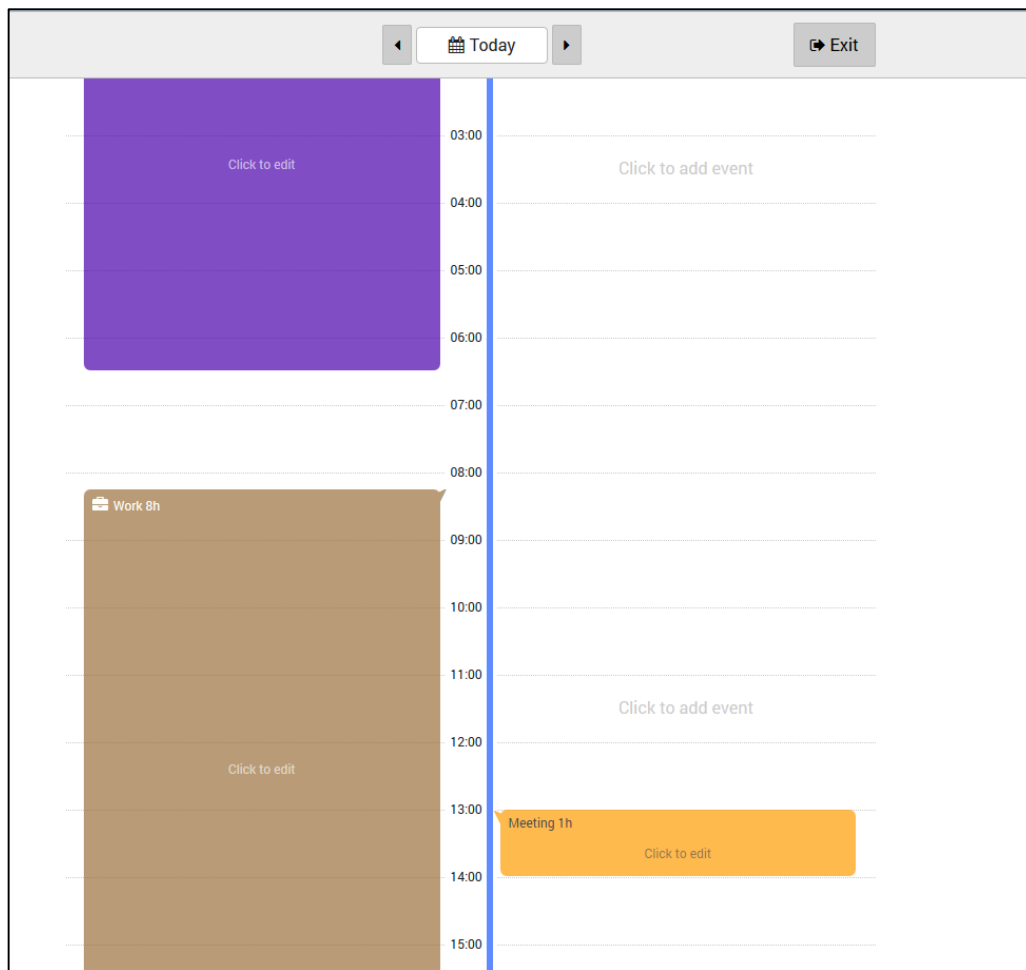
Personal information
! Height is not marked.

### 3.3.3. Journal

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



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



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

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



**Select marker type:**

- Write own event...
- Computer
- Driving/travel
- Eating
- Exercise
- Meeting
- Nap
- Reading
- Relaxation
- Shower/bath
- TV
- Alcohol
- Medication

Cancel

**Write own event...**

Description: Morning meeting

Starts: Today 10 : 00

Ends: Today 11 : 00

Save Cancel

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

**Select marker type:**

- Work
- Sleep
- Write own event...
- Computer

**Sleep**

Starts: Today 07 : 15

Ends: Today 08 : 15

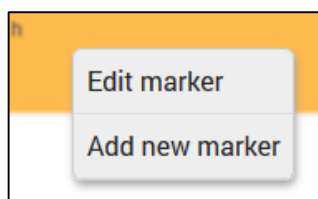
How did you sleep?

Select

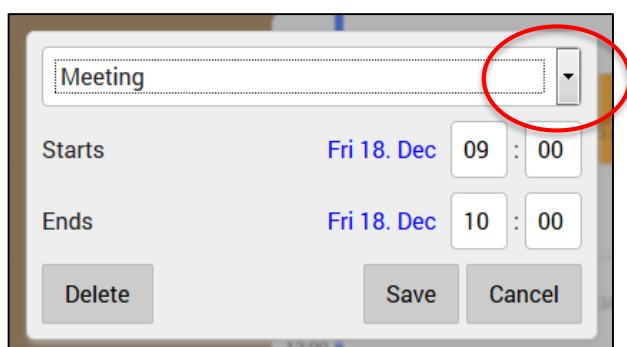
- Select
- Well
- Fairly well
- Not well but not badly
- Fairly badly
- Badly

Save your event by clicking **Save**.

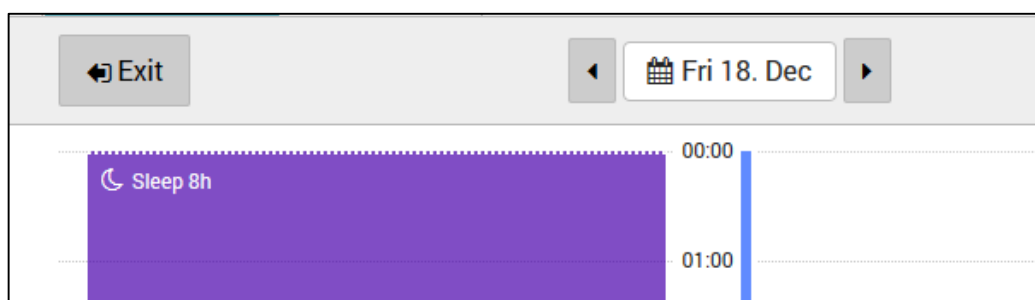
The event can be edited or deleted by clicking an event in question and selecting *Edit marker*.



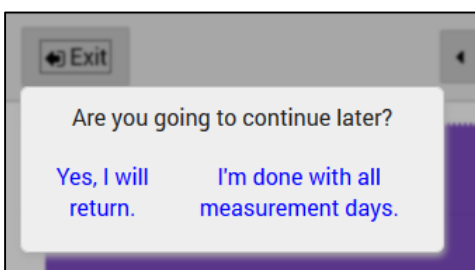
In the opening windows you can either change the marker type (marked with red), edit the starting and ending times or delete the event (select Delete).



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



With *Exit* button you can shut and save the journal. If the journal is not yet ready, select *Yes, I will return*. If you have finished the journal, select *I'm done with all measurement days*. When you select you are ready, the journal will be saved on state *OK*.



*Note!*

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

### 3.3.4. Goals

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

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

**Own goals**

Write goal...

Write goal...

Write goal...

**Work**

☐ I will remember to drink and eat regularly, even when I'm busy.

☐ I will include some light physical activity in my work days.

☐ I will set a realistic work schedule.

☐ I will set a "no-later-than" time for leaving work.

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

**Leisure time**

☐ I will engage in recovery activities that I feel work best for me (e.g. relaxation techniques, meditation, watching TV, reading).

☐ I will learn to say "No".

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

☐ I will maintain a regular meal rhythm.

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

☐ I will lose weight  kg.

☐ I will increase my amount of daily activity.

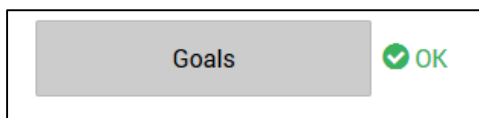
☐ I will attempt to engage in physical activity at least  times per week.

The goals can be chosen from the list.

Own goals can be set to the *Own goals* fields.

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

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



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



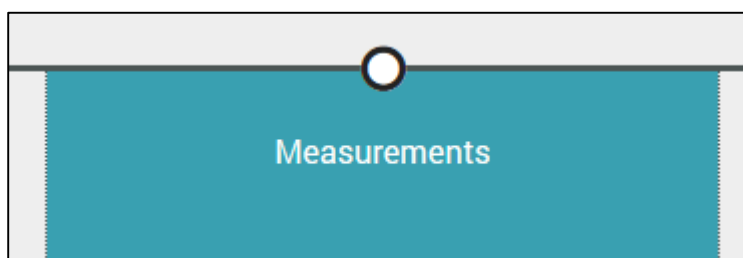
The selected goals will be printed to the *Goals* page of the assessment report package.

### 3.4. Upload and edit measurements

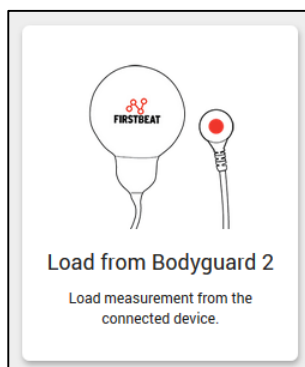
After the client has returned the device, the measurements in the device can be uploaded to the Firstbeat Lifestyle Assessment. Uploading occurs either directly to the server (Bodyguard 2) or with the Firstbeat Uploader software.

#### 3.4.1. Firstbeat Bodyguard 2

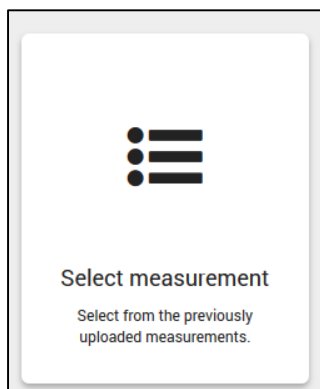
1. Find your client's assessment (see chapter 1 Home page functions) and select *Measurements* step.



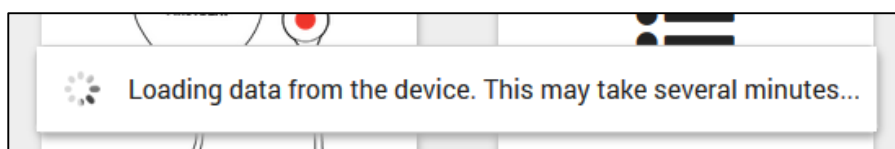
2. Plug in the Bodyguard 2 to the computer's USB port and select *Load from Bodyguard 2*.



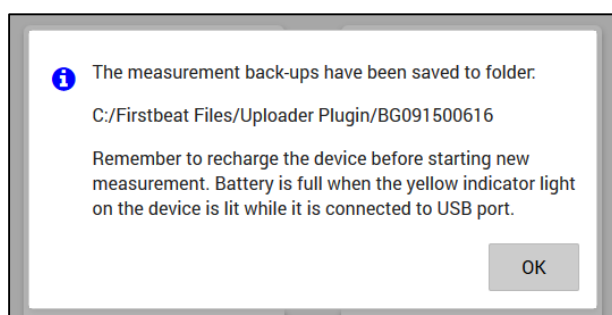
If you want to add data to the assessment from some previously uploaded measurement, select *Select measurement*.



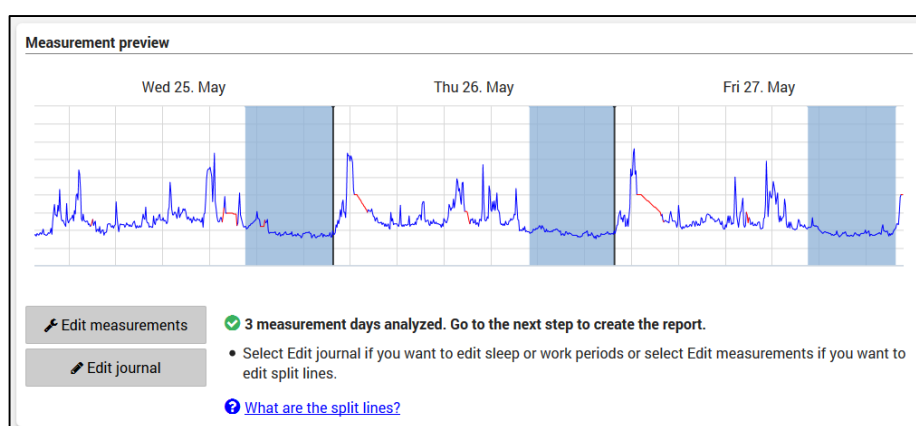
3. The program now uploads the measurement to the server. Loading of the measurements may take several minutes depending on the speed of your computer and the internet connection.



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

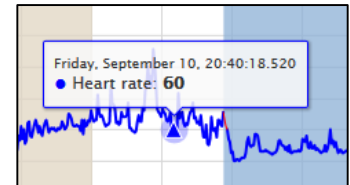


5. The next view that opens up automatically shows the measurement that you just uploaded.



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

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



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

### 3.4.2. Firstbeat Bodyguard

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

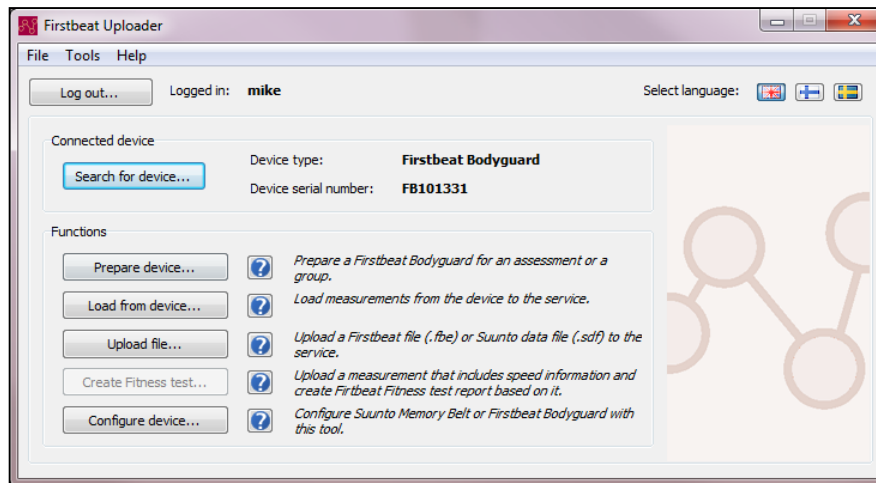
1. Upload measurements with Firstbeat Uploader. Open the Uploader from the icon on your desktop.



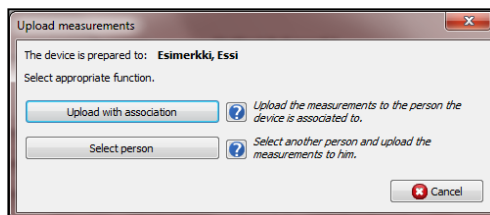
2. The Uploader will open a sign-in window. Sign in with the same username and password that you used to sign in to the Firstbeat Lifestyle Assessment.



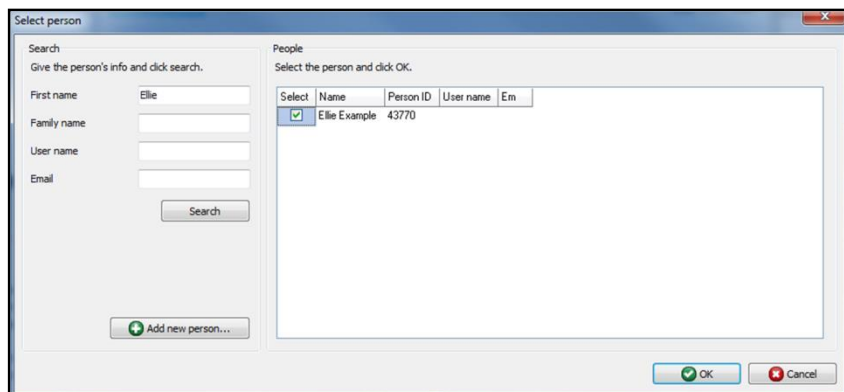
- After plugging the device to the cable, select *Search device* and then *Search Firstbeat device*. When the Bodyguard has been found, click *Upload measurements*.



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

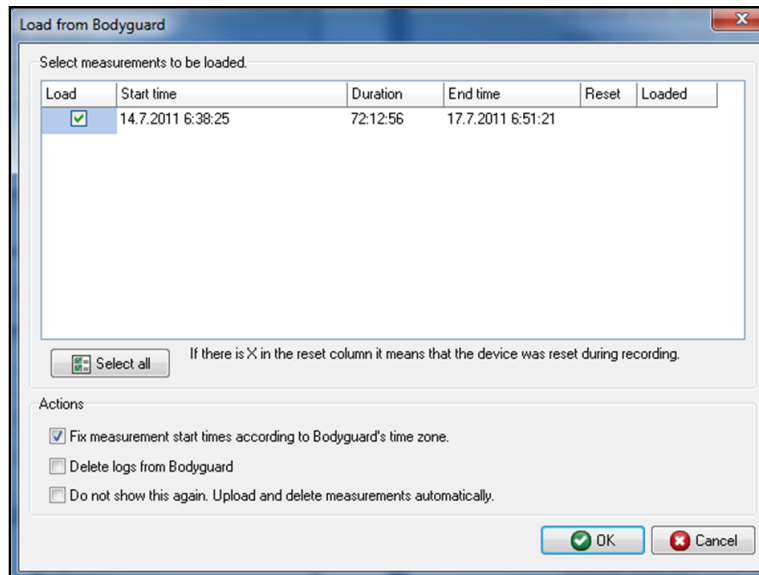


- If the device has not been prepared ahead of time to a specific assessment, select the profile for which to upload the measurement and press *OK*. You can define the search by providing information on the left and clicking *Search*.



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

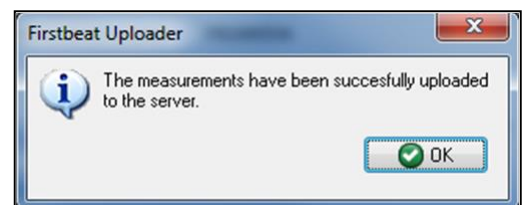
6. Select the measurements to be uploaded. If the starting time is wrong for some reason, you can fix it here by double clicking the starting time and typing in the correct date and time. In the end, press *OK*.



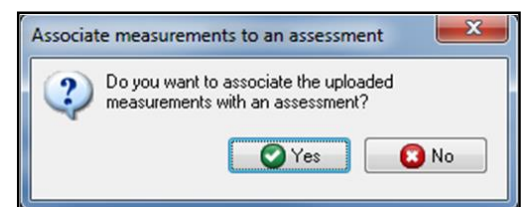
*Note! There might be more than one measurement in the device, if the recording has been interrupted for a while during the measurement period. The selected measurements are later combined into one segment.*

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

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

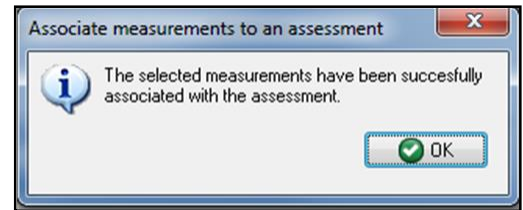


8. Next the Uploader will ask you if you wish to associate the measurement with an assessment. This step adds the measurement to an assessment that has not been started or is incomplete. If you choose *No*, the program will upload it to the person's profile, but will not associate it with a specific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

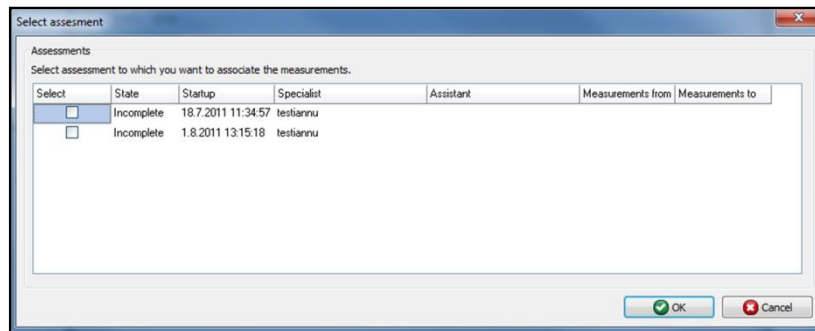




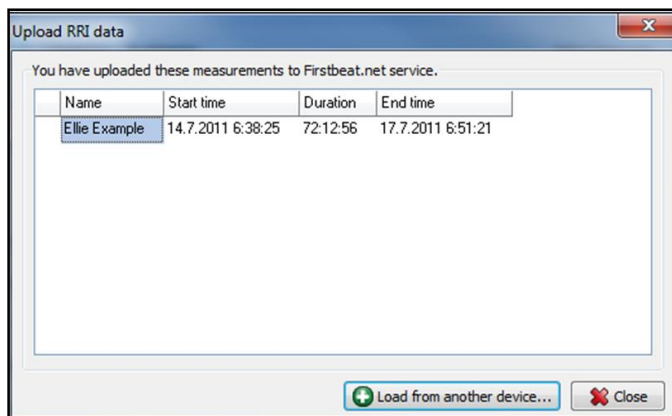
If you choose *Yes*, and the person only has one assessment, the program will automatically add the measurement to this assessment. In the end, press *OK*.



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



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





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

### 3.4.3. Edit measurements

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

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

 Edit measurements

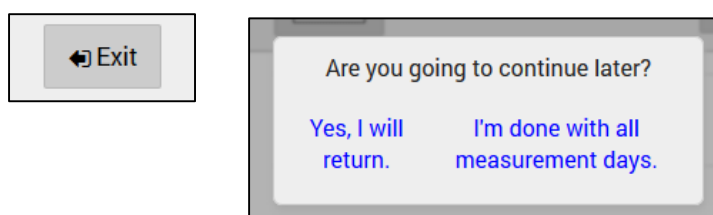
 Edit journal

**❗ Missing sleep periods**

- Edit journal to add the missing sleep periods. Select Edit measurements if you want to edit split lines.

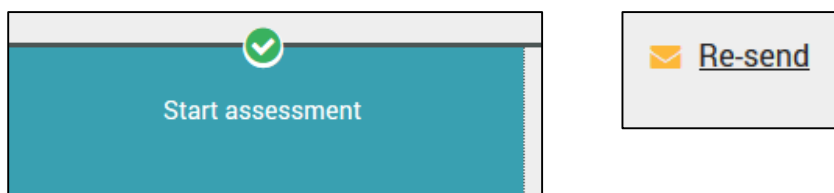
**?** [What are the split lines?](#)

Open the journal, fix the sleep times and select *Exit > I'm done with all measurement days*.

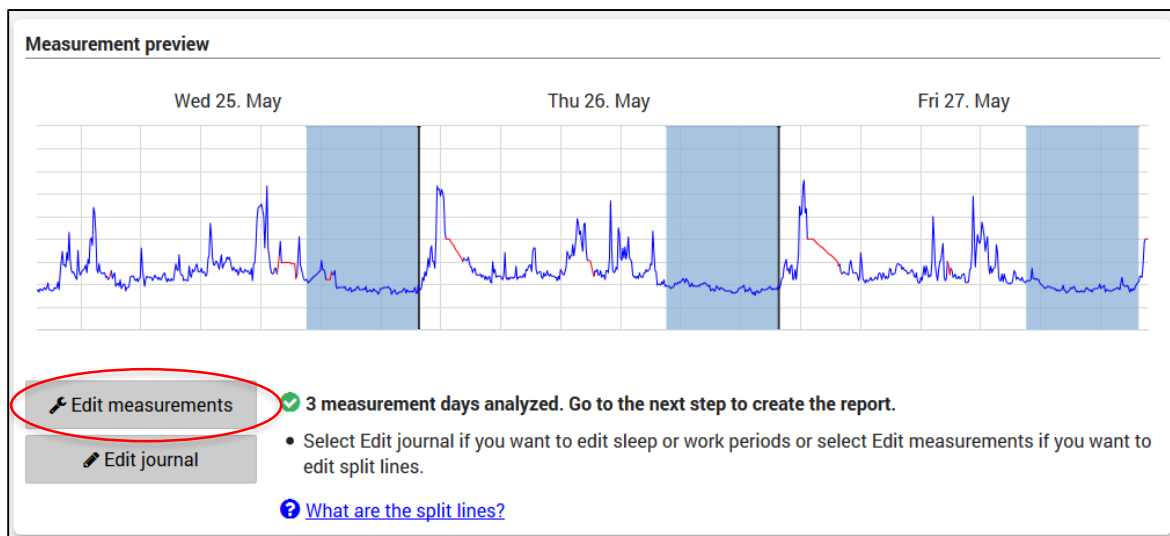


The journal will be saved and the *Measurement preview* returns.

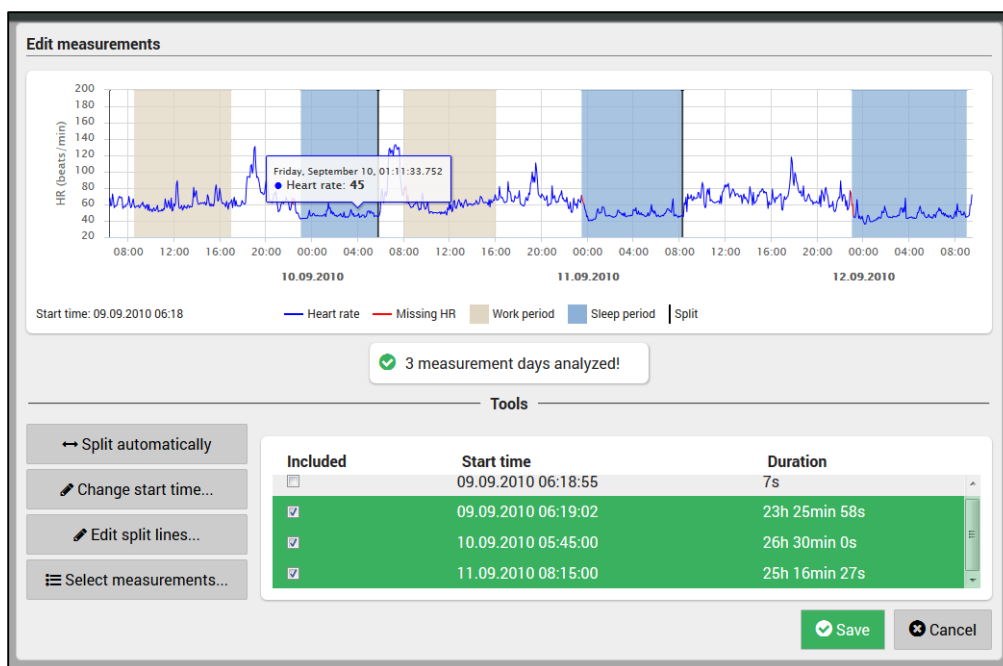
You can also re-send the link to the journal to your client by selecting *Start assessment* step and clicking *Re-send*.



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

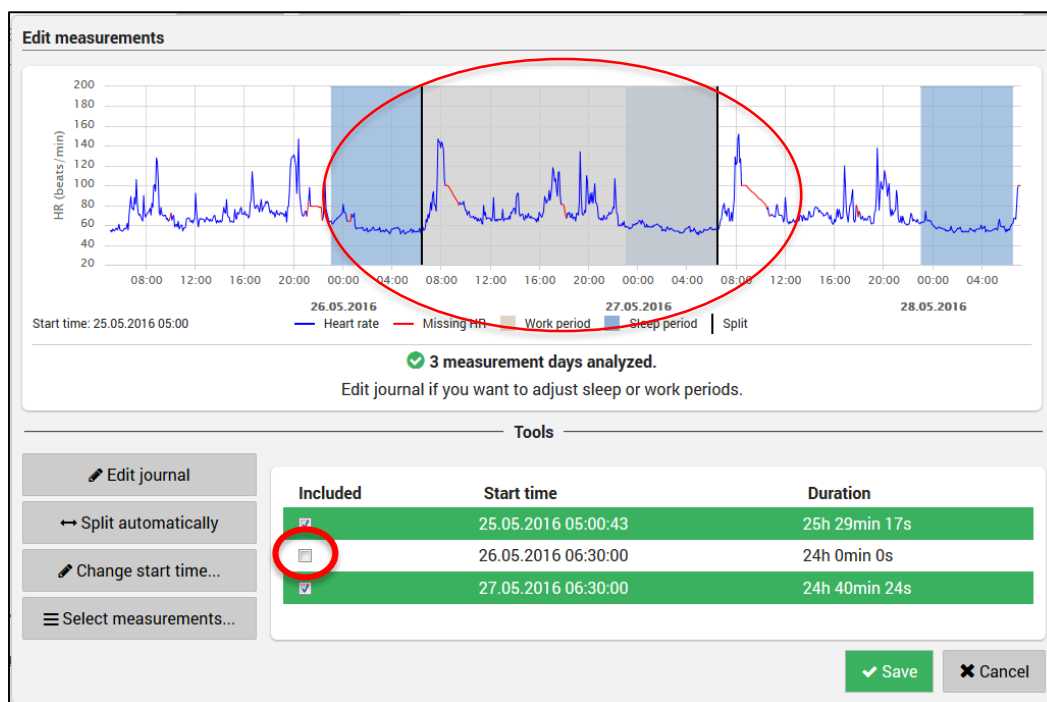


*Edit measurements* view opens.

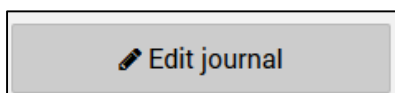


Measurements included to the assessment can be seen listed in the table on the right. When there is a selection in the *Included* column the measurement period in the same row will be included to the report.

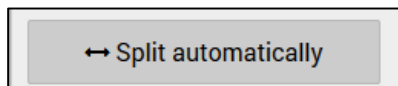
If you want that some of the measurement periods is left out from the report, remove the selection. Now the measurement period in question will be shown with the grey background.



- Via **Edit Journal** tab you can go to the journal to edit the journal markers



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

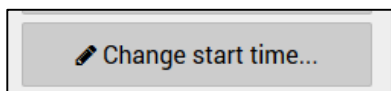


- **Editing split lines:** If needed you can fix the points of split lines by dragging or clicking.

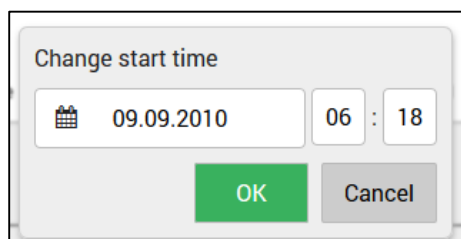
You can add new split lines by clicking the measurement chart and setting the time of split line to the opening window. To edit or delete existing split lines click the desired line and choose the actions. Existing split line can be moved by dragging it to another place in heart rate graph.

A dialog box titled 'Edit split'. It contains a date input field with a calendar icon, showing '11.09.2010', and a time input field showing '08 : 15'. Below these are three buttons: 'Delete', 'OK', and 'Cancel'.

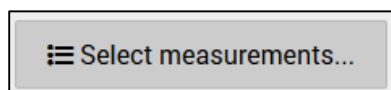
- **Change start time** tab allows you to make changes to the start time of the measurement if needed.



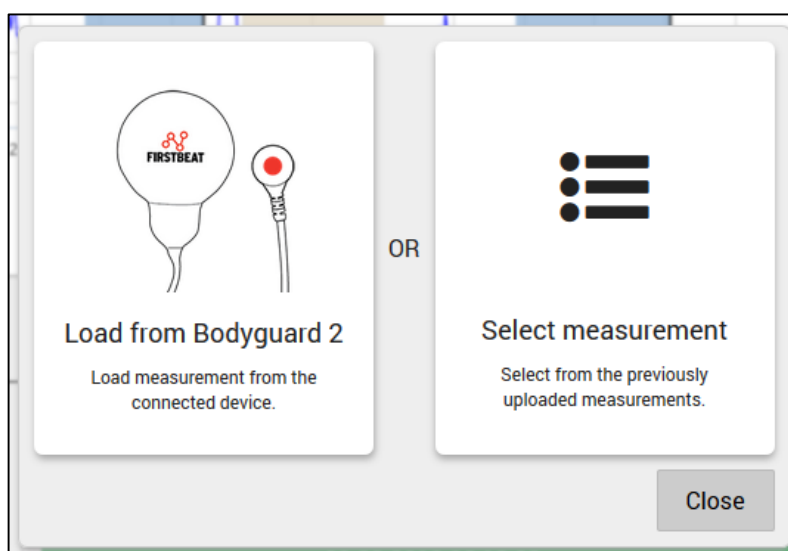
Set the start time in the opening window and click *OK*.



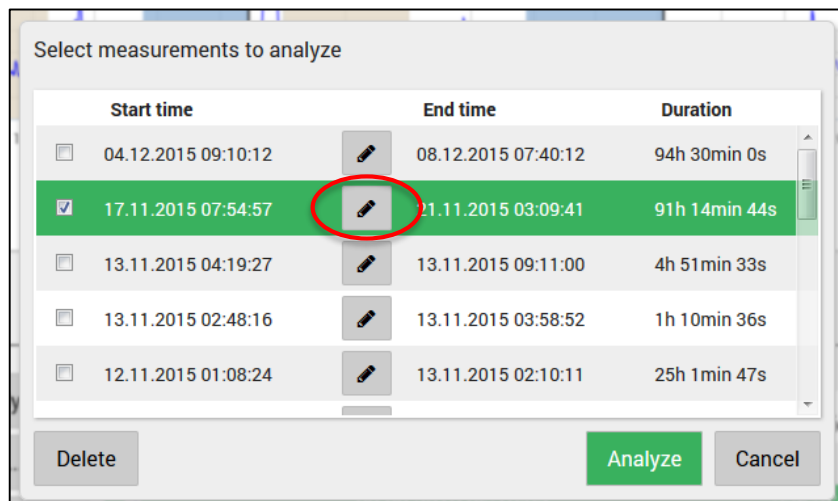
- With **Select measurements feature** you can remove, add or change the measurements used in the assessment.



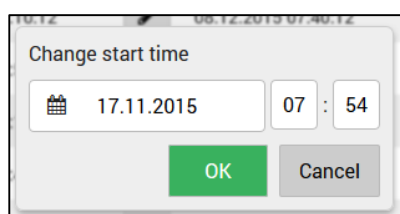
Choose if you want to load new measurements from Bodyguard 2 device or select from previously uploaded measurements.



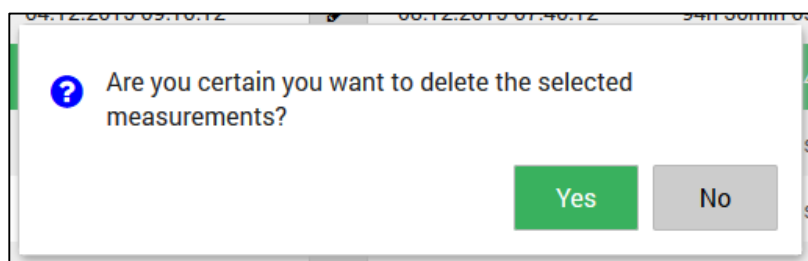
If you choose *Select measurement*, a window with a list of all measurements loaded to the profile in question opens.



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

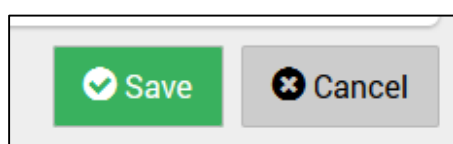


If you want to delete measurements, select the desired measurement/measurements and click *Delete*. The software will confirm are you certain you want to delete the measurement/measurements in question.



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

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

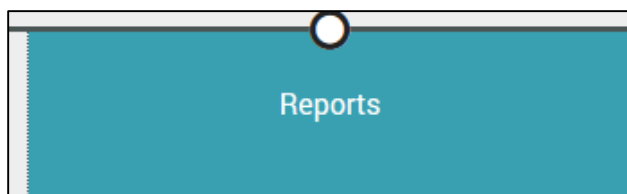


You will now return to the *Measurement preview*.

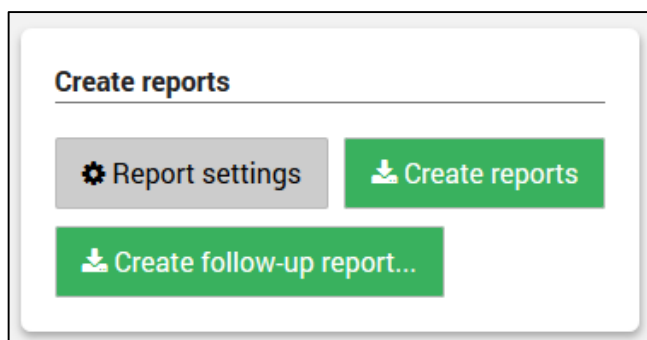
### 3.5. Creating reports

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

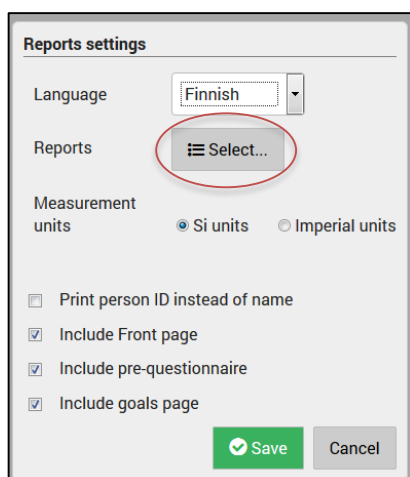
Move to the *Reports* step.



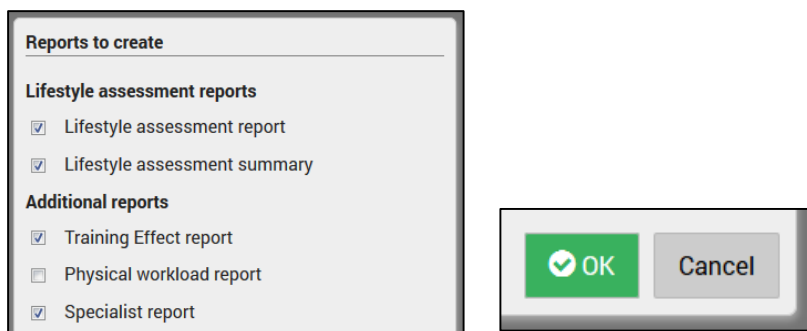
In this view you can set the report settings and create reports and follow-up report.



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



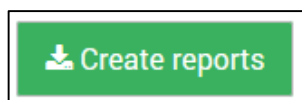
To select the reports, you want to create click *Select* tab.



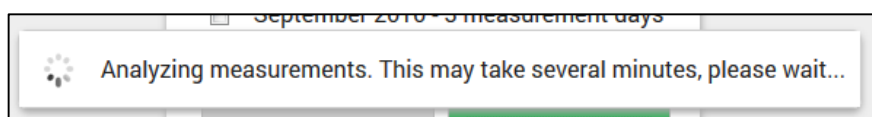
Select the reports and click OK.

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

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



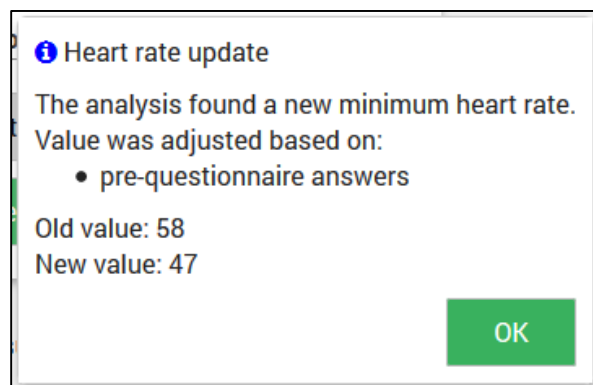
Now software begins to create the reports.



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

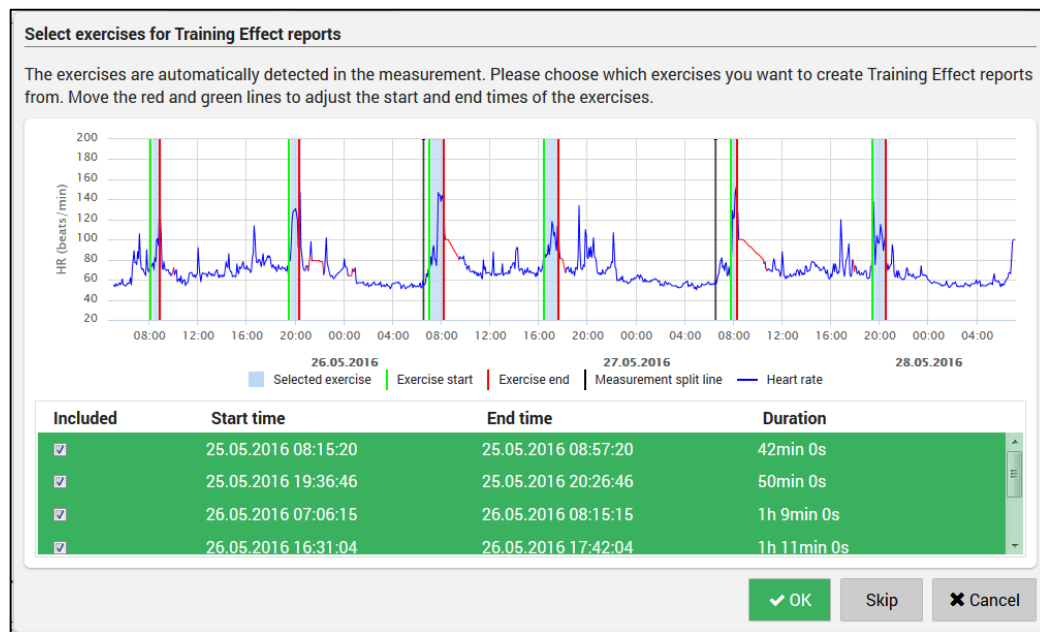
The program also does an automatic reduction of resting heart rate if the person has consumed alcohol on all measurement days, slept poorly or recorded feeling stressed and not well in the pre-questionnaire.

Click *OK* to confirm the update.





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



You can also edit the start and end times of exercises by dragging the split lines. After selecting the exercises, click **OK**.

If you do not want to create Training Effect report, select **Skip**.

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

**Create reports**

Report settings Create reports

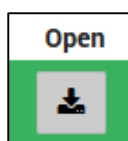
Create follow-up report...

**Saved reports**

Report	Open	Send	Delete
Lifestyle Assessment Eddie Example 25.05.2016.pdf			

Customer survey will be sent automatically on 21.06.2016 00:00. [Edit...](#)

You can open the reports by clicking *Open*.



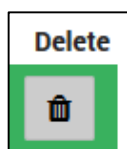
If you want to send reports by email, select *Send*.



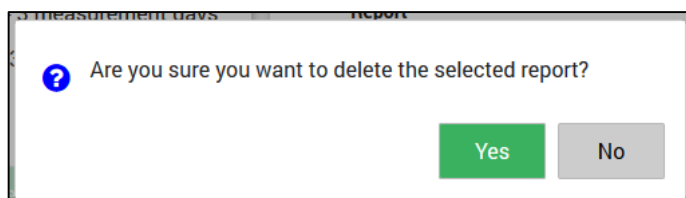
Type an email address and select the language of the message in the opening window. In the end click *Send*.

A dialog box for sending an email. It has two input fields: 'E-mail address' with the text 'sample.specialist@example.com' and 'Message language' with a dropdown menu set to 'English'. At the bottom right are two buttons: a green 'Send' button with an envelope icon and a grey 'Cancel' button with a close icon.

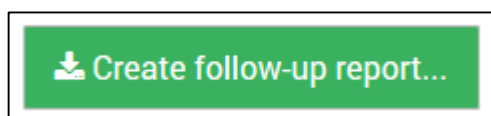
The reports can be deleted by selecting *Delete*.



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





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



Select the lifestyle assessments you want to include in the follow-up report.  
These assessments will be compared with each other.  
After selecting the desired assessment/assessments, click *Create follow-up report*.

Select the assessments that you want to include in Follow-up report.

- ☐ September 2010 - 3 measurement days
- ☐ May 2011 - 3 measurement days
- ☐ November 2011 - 3 measurement days
- ☒ September 2015 - 1 measurement days
- ☒ June 2016 - 3 measurement days



 Create follow-up report  Cancel


### 3.6. Customer survey

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





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



**Create reports**

 Report settings  Create reports

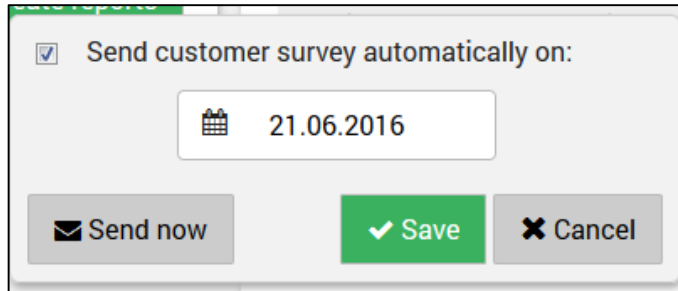
 Create follow-up report...

**Saved reports**


Report	Open	Send	Delete
 Lifestyle Assessment Eddie Example 25.05.2016.pdf			




 Customer survey will be sent automatically on 21.06.2016 00:00.  [Edit...](#)

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

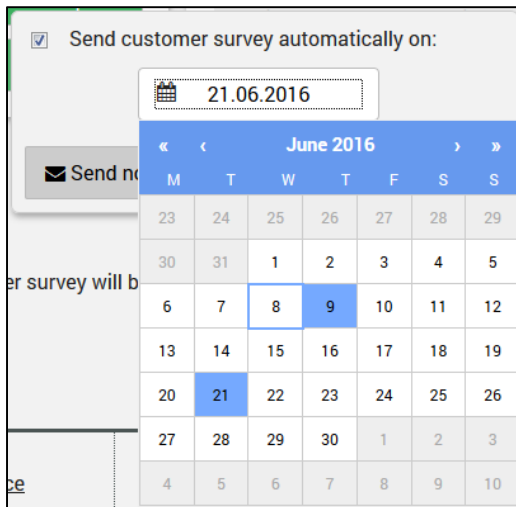


☒ Send customer survey automatically on:


 21.06.2016


 Send now  Save  Cancel

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



☒ Send customer survey automatically on:

 21.06.2016

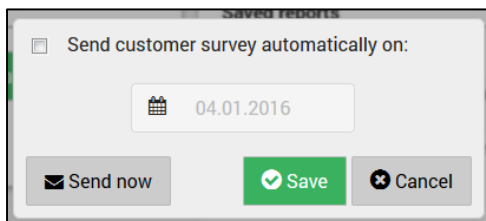
 Send now

er survey will b


ce




June 2016						
M	T	W	T	F	S	S
23	24	25	26	27	28	29
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

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



☐ Send customer survey automatically on:

 04.01.2016

 Send now  Save  Cancel

After doing the changes needed click *Save*.

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

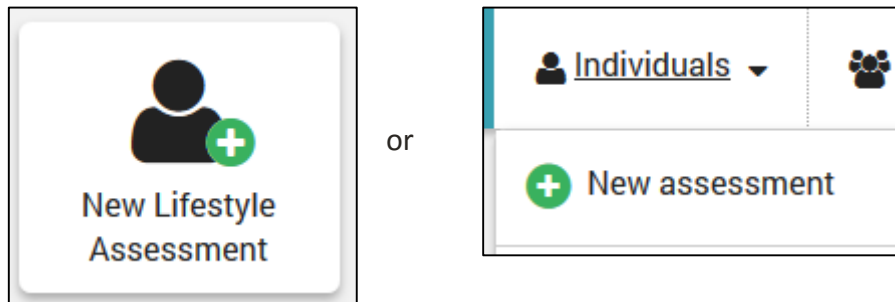
## 4. Lifestyle Assessment with Firstbeat Center

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

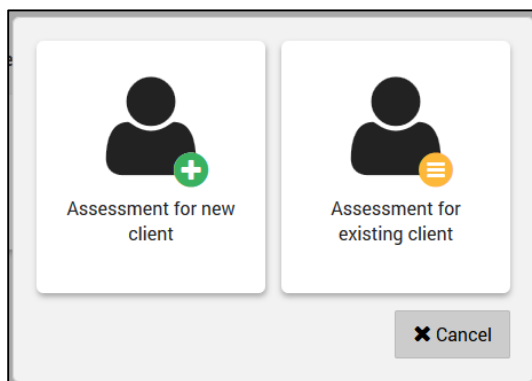
### 4.1. Lifestyle assessment to individuals

#### 4.1.1. Creating a lifestyle assessment

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



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



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

Select also *Use Firstbeat Center*.

**Assessment details**

Client Eddie Example

First name Eddie

Last name Example

Language English

E-mail eddie.example@example.fi

Link will be sent on Today

Link expires on 29.06.2016

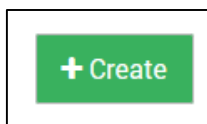
☒ Use Firstbeat Center

+ Create X Cancel

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

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

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

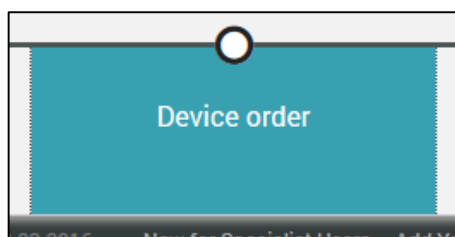


4. Lifestyle assessment has now been created successfully. You can edit the assessment details by selecting *Edit* in Start assessment task.

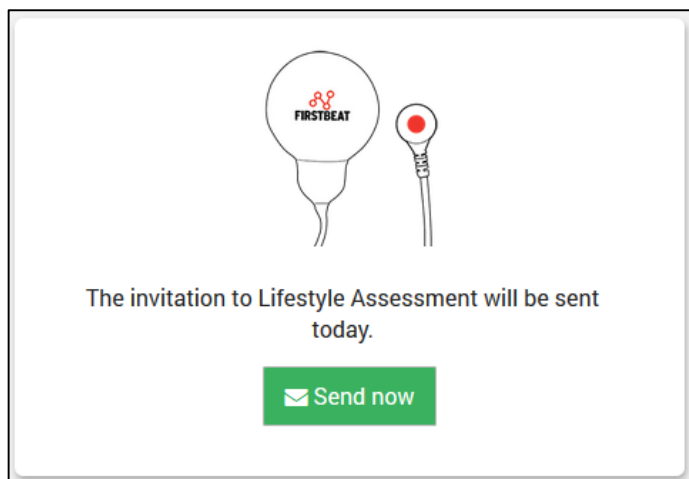
#### 4.1.2. Device order

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

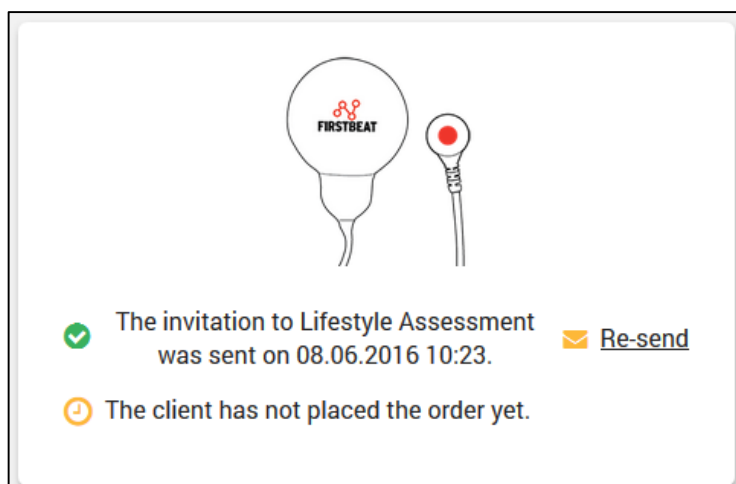
The status of the invitation and the order can be checked under the Device order task.



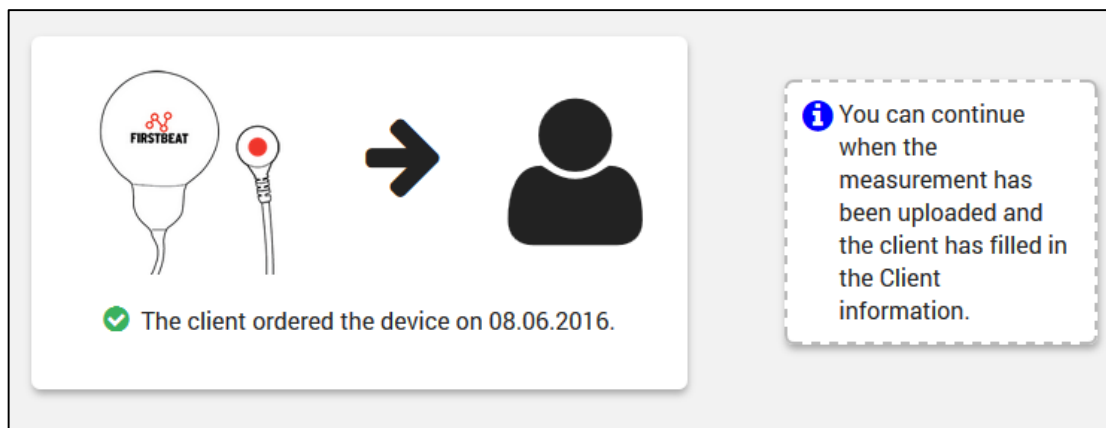
The view shows you the sending date. The invitation can also be sent right away by selecting *Send now*.



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



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

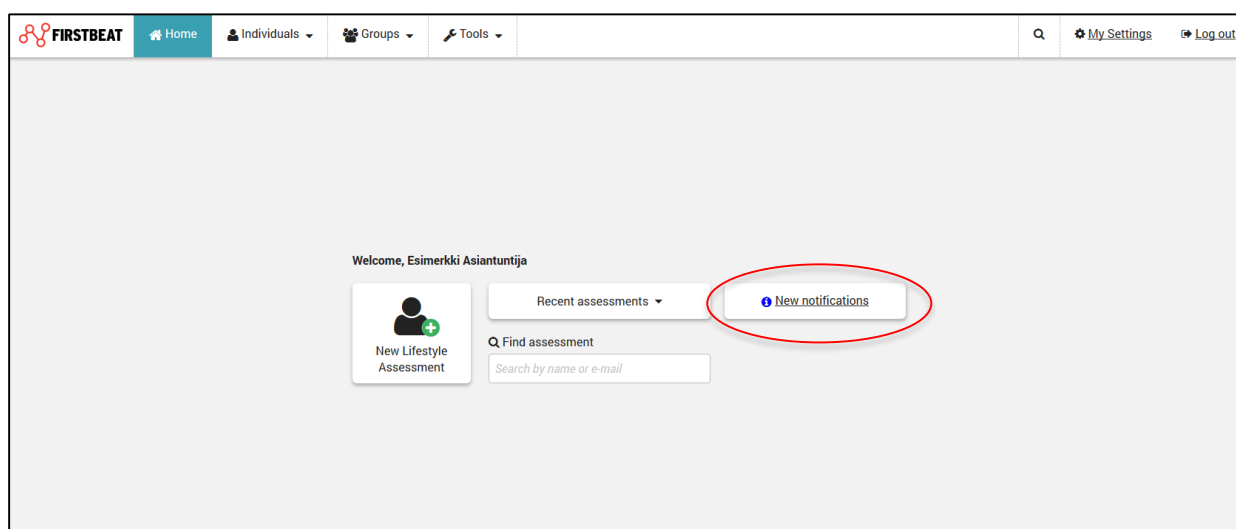


After making the order, your client will get an email with a link to the background information form and journal. The device will be sent the next work day after the order.

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

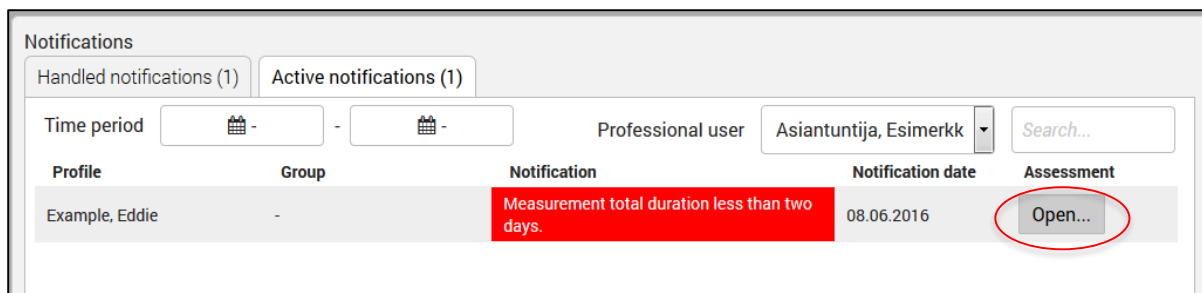
#### 4.1.3. Actions after the measurement

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



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

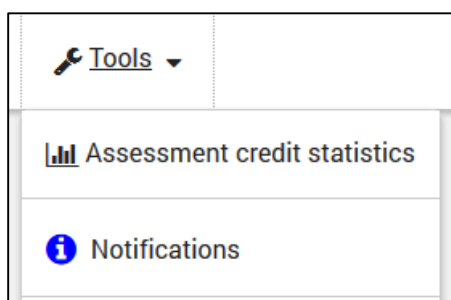




You can view the measurement and finish the lifestyle assessment by clicking *Open*.

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

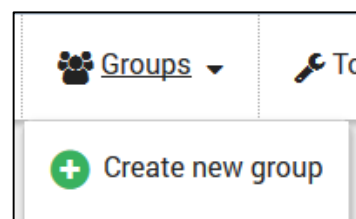
When you have checked all the lifestyle assessments with notifications, the notifications will move under the Handled notifications tab. All notifications can also be checked by selecting *Tools > Notifications* from the home page.



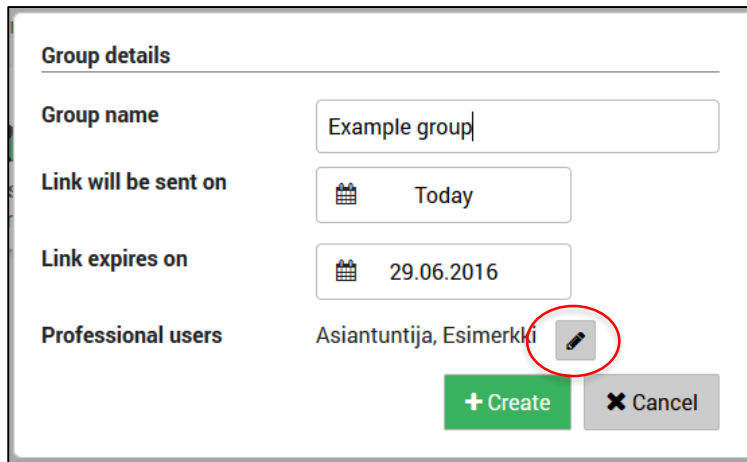
## 4.2. Lifestyle assessment to a group

The Group feature will mainly be added to the new Lifestyle Assessment in future releases. At this moment, you can create groups that are made with the Firstbeat Center service.

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



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



The screenshot shows a 'Group details' form with the following fields and controls:

- Group name:** A text input field containing 'Example group'.
- Link will be sent on:** A date picker showing 'Today'.
- Link expires on:** A date picker showing '29.06.2016'.
- Professional users:** A list containing 'Asiantuntija, Esimerkki'. To the right of this list is a small square button with a pencil icon, which is circled in red.
- Buttons:** At the bottom right, there are two buttons: a green '+ Create' button and a grey 'X Cancel' button.

After filling all the details, click *Create*.

The group has now been created to the Lifestyle Assessment server. To handle the group further, sign in to the old Lifestyle Assessment.