**The Nudge Machine**

The Nudge Machine is a behavioral insight platform for coaches and coachees. It provides an instrumentation and measurement framework for behavioral interventions enabling coachees to track progress and coaches to tailor instruction. Using The Nudge Machine, coachees can set and track goals while the coach can reach out and support their coachees whether it be it inside the classroom or in the context of their daily lives. The tool is device independent and can be used on a mobile or desktop browser. It’s a virtual coach-in-your-pocket.

**Getting Started Guide**

A getting started guide aimed at coachees is covered in this documentation. The minimum you need to do to get started is to complete a once-off enrolment process. You can then configure your goals and begin the process of recording and monitoring your goal attainment performance.

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| Home Menu This is the home page which you can reach by entering [http://**DOMAIN**](http://DOMAIN) in your browser. The value of **DOMAIN** is described below.  There are three main sections to this application, a Home Menu, a Settings Menu and a Help Menu.  To access the Help Menu click the info icon located at the left of the page header. To access the Settings Menu click the gear icon located at the right of the page header.  **DOMAIN** can take the values of: [www.thenudgemachine.com](http://www.thenudgemachine.com) or [www.satimetry.com](http://www.satimetry.com)  Students on the POGO-8056 course must use [www.thenudgemachine.com](http://www.thenudgemachine.com)  The [www.satimetry.com](http://www.satimetry.com) site is a demonstration site for all other users. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.11.57 pm.png |
| Settings Menu The Settings Menu is where users can configure the application. An example of this is first-time enrolment and defining goals.  You can reach the Settings Menu by clicking the gear icon on the Home Menu or by entering [http://**DOMAIN**/settings.php](http://DOMAIN/settings.php) in your browser.  To use this application you need to first enroll. Select the Enroll option which will take you to the Enrolment Form.  Refer to the Home Menu documentation in this for the value of **DOMAIN** | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.13.07 pm.png |
| Enroll Complete the Enrolment Form as per the example to the right then click Enroll to save.  Note that this application supports the notion of programs. Programs are a way to organize coachees and their coach into a group. This application is multi-tenanted in the sense that it can support many programs.  For POGO-8056 students the program defaults to as listed on the right.  Visitors using the demonstration system at [www.satimetry.com](http://www.satimetry.com) will use the program known as “The Coach in Your Pocket”. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.14.55 pm.png |
| Login To verify that you have successfully enrolled, return to the Home Menu and select Login.  Complete the Login Form as per the example to the right then click Login.  Note again, for POGO-8056 students the program defaults to as listed on the right.  Visitors using the demonstration system at [www.satimetry.com](http://www.satimetry.com) will select the program known as “The Coach in Your Pocket”. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.16.00 pm.png |
| Goal Configuration To configure your goals, navigate to the Settings Menu then select Goals.  Goals follow the Goal Attainment Scale convention and so are organized as a three tier hierarchy for 1) higher order goals, 2) lower order goals and then the 3) goal attainment scale itself.  To begin with, goals use default settings and descriptions which you can customize. To describe your higher order goal click the gear icon to the right of the list entry. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.16.40 pm.png |
| Higher Order Goal Configuration Enter the description for your higher order goal and then click Update to save. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.21.36 pm.png |
| Lower Order Goal Navigation You will then be returned to the top level of the goal setting hierarchy and your customized goal will now appear.  To customize the lower order goal drill down to the next level by clicking on the list entry, e.g. somewhere around the text “Become more serene”. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.21.59 pm.png |
| Lower Order Goal Configuration You are now in the Lower order goals settings page.  As with the Higher order goal, click the gear icon to the right of the list entry to customize your goal.  You will then be presented with a form in which you can update your goal description as you completed earlier for the higher order goal. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.22.28 pm.png |
| Goal Attainment Scale Navigation To complete the goal attainment scale level, navigate down to the Lower order goal.  You can then reach the goal attainment scale level clicking on the list entry, e.g. somewhere around the text “Do more mediation practice”. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.23.36 pm.png |
| GAS Goal Configuration You will now be presented with the default entries for each of the five goal attainment scale levels. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.24.06 pm.png |
| GAS Configuration Example Each of the five goals at this level are customized as before, with the addition that you also need to add a low and high threshold for the goal.  Upon pressing Update your changes will be saved and then you will be navigated back to the Higher order goal level. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.26.22 pm.png |
| GAS Configuration Cont. To complete the remaining goals, navigate down and repeat as per the previous example. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.26.52 pm.png |
| GAS Configuration Cont. Note that in this example, the Low and High thresholds are 2 and 3. The thresholds across your five goal scale should completely cover but not overlap your goal scale. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.28.04 pm.png |
| GAS Configuration Cont. Once completed, your lowest goal level will look something like the example to the right.  In this example, goals are measured at the week level, but you may prefer to measure at the day level. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.30.31 pm.png |
| Goal Entry Now that your goals have been configured you can self-report goal attainment.  This function is located in the Home Menu, then click Goals.  Your customized Higher and Lower order goals will then be presented.  When you click the r-arrow icon to the right of the list you will be presented with a goal self-report entry form. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.31.23 pm.png |
| Goal Entry Form Complete the goal Form to record your attainment for the time period of interest.  Note that the page includes a Last updated: field which will display the last entry recorded. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.31.49 pm.png |
| Charts The application will create and update various charts to visualize your information.  This feature is accessible from the Home Menu then click Charts.  New chart types are added from time to time. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.35.06 pm.png |
| User Charts Charts related to your goal attainment scale performance are located under User.  From time to time, additional charts may be added to the application. For example, the Activity chart shows steps counted using a fitbit wearable sensor. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-17 at 9.55.51 am.png |
| GAS Charts To save the chart, just click the chart list entry and the chart of interest will be presented as a full page on your browser.  Use right-mouse-button-down to save. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.36.01 pm.png |
| Polls The application includes support for polls and surveys. Polls can point to externally hosted surveys or can be internally hosted simple likert scaled polls.  The Poll function is located under the Home upon which you will be presented with a list of available polls. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-17 at 9.17.25 pm.png |
| Poll Entry Clicking a poll of interest will take you to the poll which you can then complete and submit.  If the poll is externally hosted you need to return to the application using the back button or reentering the application home page URL. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-17 at 9.18.20 pm.png |
| Resources The application includes pointers to content of interest.  This feature is accessible from the Home Menu then click Resources. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.32.40 pm.png |
| Links The Links sub-menu is where useful external content pointers are located.  Your coach may update this with new content from time to time. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.33.39 pm.png |
| Support A support page has been built to support this application. It takes the form of a moderated blog site which is accessible from the Links page under the Resources sub-menu.  When you click the “User Feedback” item you will be directed to a blog page to which you can add comments | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-16 at 3.47.22 pm.png |
| Support Cont. The support page is hosted on wordpress.com as per a screen-short to the right. I will be alerted whenever a new comment appears. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-16 at 4.08.55 pm.png |
| Tools The Tools sub-menu is where useful tools are located.  For example, here you will find widgets and instructions for making this application easier to access from your device should you wish to. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.34.04 pm.png |
| Data The application includes a diary and observation entry function.  These features are accessible from the Home Menu then click Data. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.36.51 pm.png |
| Diary The diary function allows you to record journal entries.  To create an new entry click the plus icon. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.39.22 pm.png |
| Diary Entry Complete the Diary Form as per the example to the right then click Add to save. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.38.57 pm.png |
| Observations The observation data entry function allows you to record behavioral observations entries.  To create an new entry click the plus icon. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.41.15 pm.png |
| Observation Entry Complete the Observation Form as per the example to the right then click Add to save. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.40.49 pm.png |
| Nudges The application takes its name from its capacity to enable Coaches to nudge Coachees to make choices more aligned with their goals.  Nudges can take many forms. When you login to the application, a splash screen will appear if you have any unread nudges.  If you have configured pushover.net, nudges will also appear as notifications on your mobile. This is a Wi-Fi based notification app described in more detail in the Help Menu.  Click close to return to the Home Menu. If the nudge is an instruction to self-report a goal, complete a poll or e.g. peruse some content, the Go to site … button will direct you to the appropriate location. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.48.18 pm.png |
| Nudge Menu Nudges are also accessible from the Home Menu. Select Nudges to direct you to the list of nudges you have received. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.49.04 pm.png |
| Nudge Menu Items The Nudge Menu page will display a list of nudges as item. You can click on any item to read the complete nudge text.  As noted, nudges provide a communication channel by which your Coach can interact with Coachees anytime, anywhere including outside formal classroom and instruction hours.  Nudges can be manually generated by the Coach or system generated by the application itself. The nudge comment in the screen-shot to the right shows a system generated example.  System generated nudges are created each day using an automated batch style processing procedure. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-17 at 9.59.08 am.png |
| Help Menu Documentation is located in the Help Menu.  You can reach the Help Menu by clicking the info icon on the Home Menu or by entering [http://**DOMAIN**/help.php](http://DOMAIN/help.php) in your browser.  Refer to the Home Menu documentation in this for the value of **DOMAIN** | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.52.22 pm.png |
| About Once in the Help Menu you can navigate around to inspect the various content such as the About page. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.53.18 pm.png |
| Frequently Asked Questions FAQ details for each item can be inspected by clicking the plus icon. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.53.35 pm.png |
| Account Settings The application supports integration with pushover.net for mobile device notification and fitbit for activity monitoring.  Users wishing to make use of such capabilities would need to first download and configure the requisite third party application and then record their individual settings inside this application.  Such advanced settings are available from the Account sub-menu option of the Settings Menu.  Further details for users wishing to integrate pushover.bet and fitbit are available in the online help on the Help Menu. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.44.53 pm.png |
| Pushover The pushover app runs on iPhone and Android devices. If you choose to use this mobile app, place it on your home page.  New notifications will be indicated by a configurable sound and by a message count marker - in a similar way to SMS. | Macintosh HD:Users:stefanopicozzi:Downloads:photo (1).PNG |
| Notifications Notifications sent to Pushover can be inspected as per the example to the right. Just click the app and drill down into the messages of interest. | Macintosh HD:Users:stefanopicozzi:Downloads:photo.PNG |
| Rule Settings Application features are controlled by rules which are configurable by the user.  This function is located in the Rules sub-menu in the Settings Menu.  For example, the nudging mechanism is enabled or disabled by a program level rule.  For example, if the Coach has implemented a daily nudge that reminds you to complete your goal attainment self-report, you can choose to opt-out of this notification if you wish.  To do this, click the Program sub-menu. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.57.02 pm.png |
| Rule opt-in/out Configuration A list of program level rules will now appear. To opt-out of e.g. “daily survey reminders”, slide the switch to out. To save this change click the gear icon and select Save Changes. | Macintosh HD:Users:stefanopicozzi:Desktop:Screen Shot 2014-02-14 at 9.58.21 pm.png |