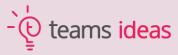


Welcome to Teams Ideas and thank you for purchasing our extended features!

We hope that this guide will help you navigate your way through to get the best experience from our tool.



BOARD VIEW

Board view is an easy way to create your own customized stages and easily drag and drop ideas from one stage to the other, allowing for easy tracking of where they are in development.



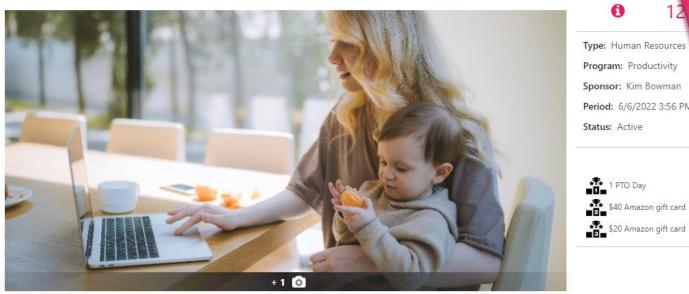




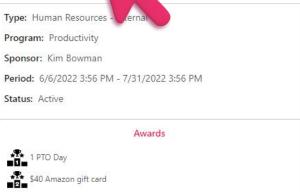
Only Campaign
Creators can access
the Board View.

To access, while in an active campaign, click on the button to the left of Manage Campaign that says "Board".

HOW TO MAINTAIN PRODUCTIVITY WORKING FROM HOME



Because our workforce has transitioned to working from home, we want to stay supportive of the transition since it's preferred by most. Because of this, we are looking for ways that colleagues can stay productive while working from home. Please share any ideas that you have or tips that have personally helped you keep your focus.



emaining

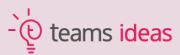
Attachments

IDEAS

Most Recent

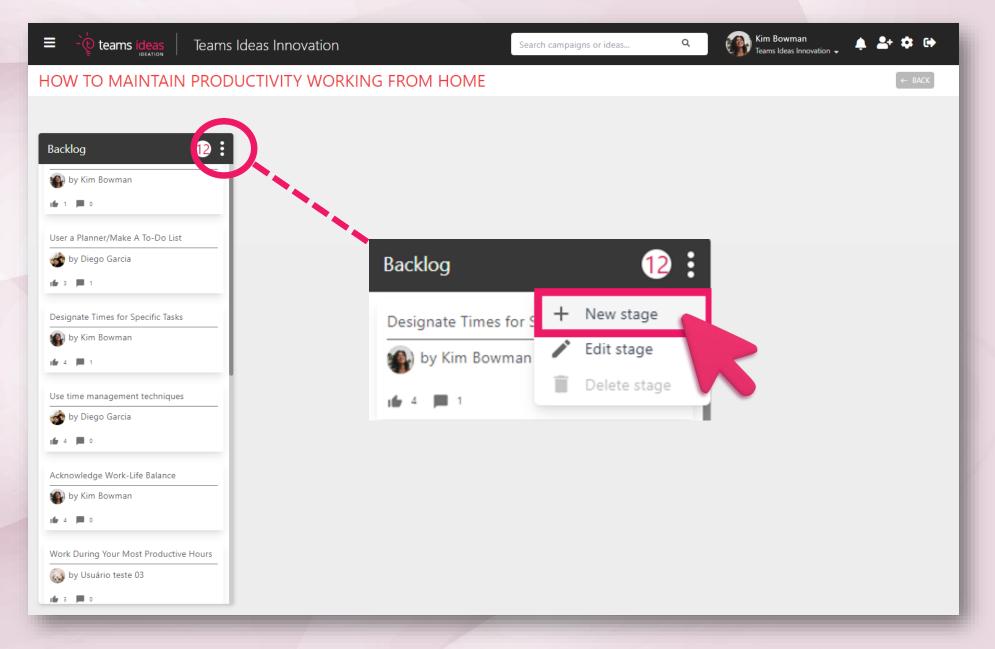
Filter Idea by Title...

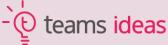




Here you will see all of the ideas from this campaign entered into a single column labled "Backlog".

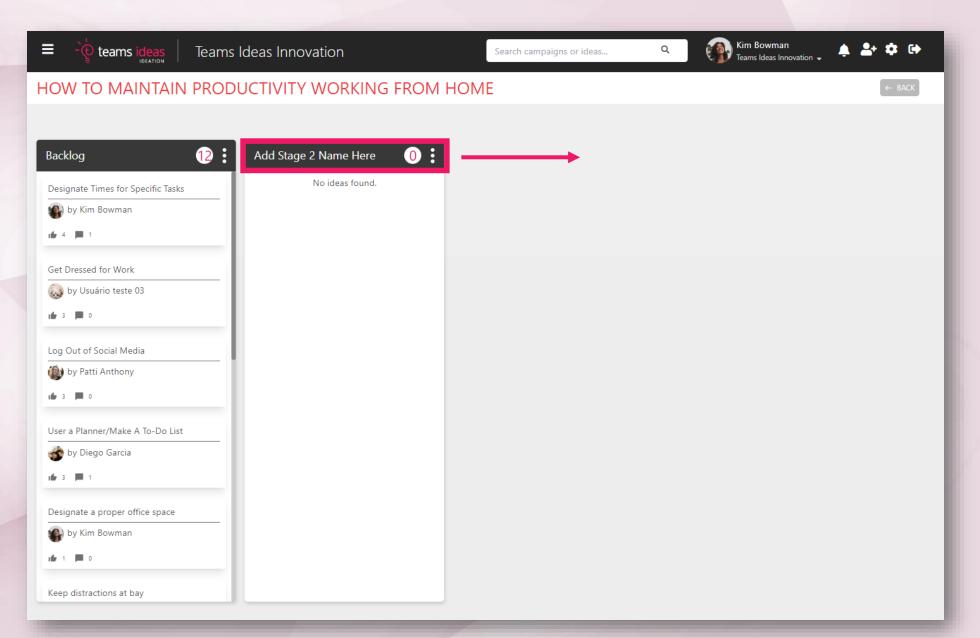
If you click on the three white dots, you will see a screen that gives you the options to add a New Stage or to Edit a Stage.

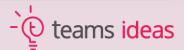




It is recommended to add every stage that you want to have on your board and name them accordingly.

After you do that and see the big picture view of how the ideas will flow, it is recommended to edit each stage to the desired requirements.



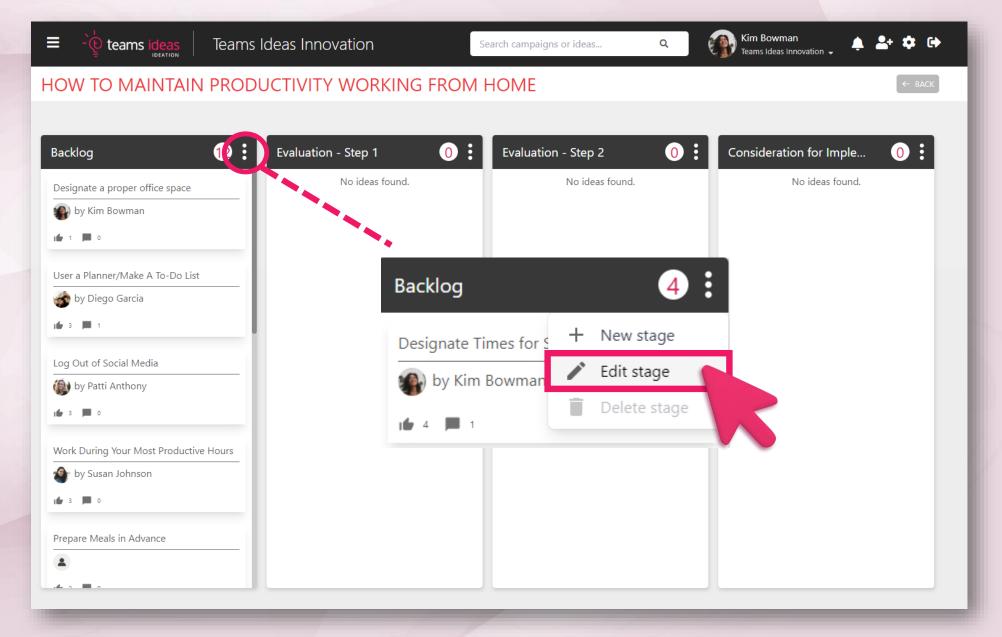


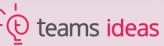
EDITING BOARD STAGES

Customize your board environment and experience with different fields and forms where you can define how the ideas move, how they are categorized, and when they move through each stage of your process.



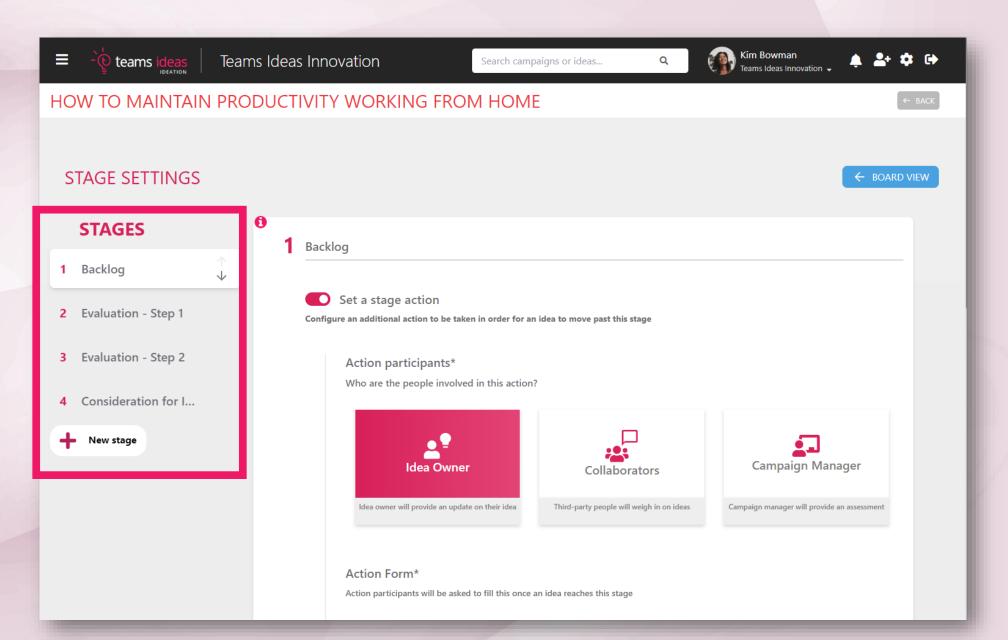
To edit any stage within the Board, click on the white dots and then select "Edit Stage".

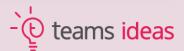




This section shows your campaign's stages. You can reorder stages, edit a stage's settings by clicking on it, or create a new stage.

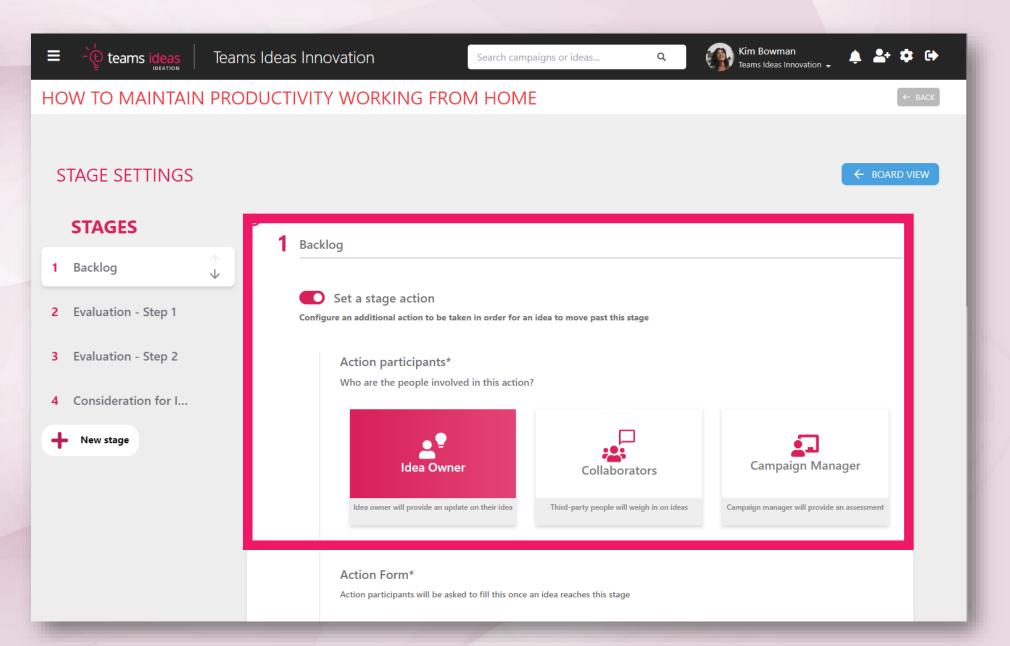
Once an idea arrives at a stage, the stage action will be triggered and participants will be prompted to act on it.

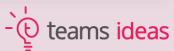




Now you must choose your participants. These are the people who will be prompted to perform the action once it is triggered.

They can be the idea owner, the campaign admin or a selected group of third-party people.

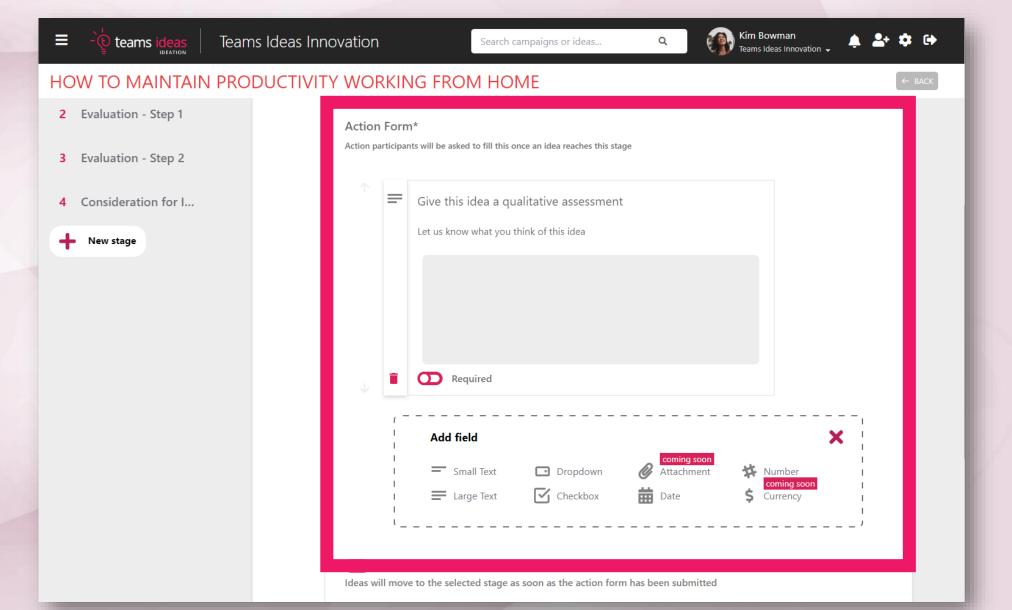


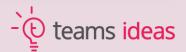


The participants will be asked to fill out a form. Once filled, this form will enrich an idea by becoming a part of it.

The form will start out as a template containing one text field. You can edit the characteristics of this field and add new ones from scratch (like making your form a checklist they submit instead of a text field).

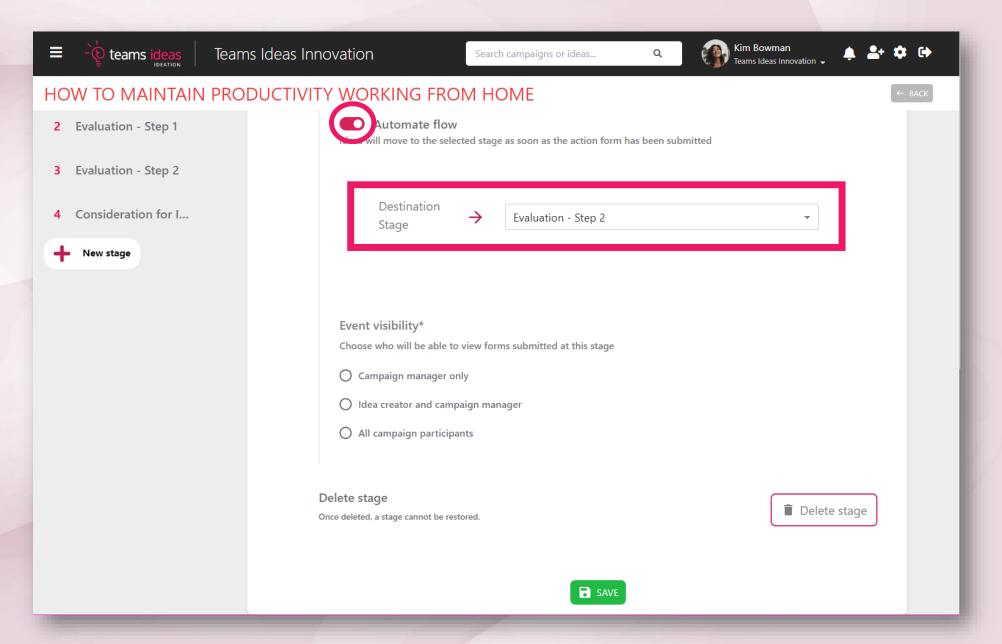
Fields can be one of several different types, so make sure to try them all!

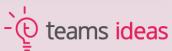




You can add automation to this stage by toggling it on. You can then select a destination stage ideas will be moved to once the action has been completed.

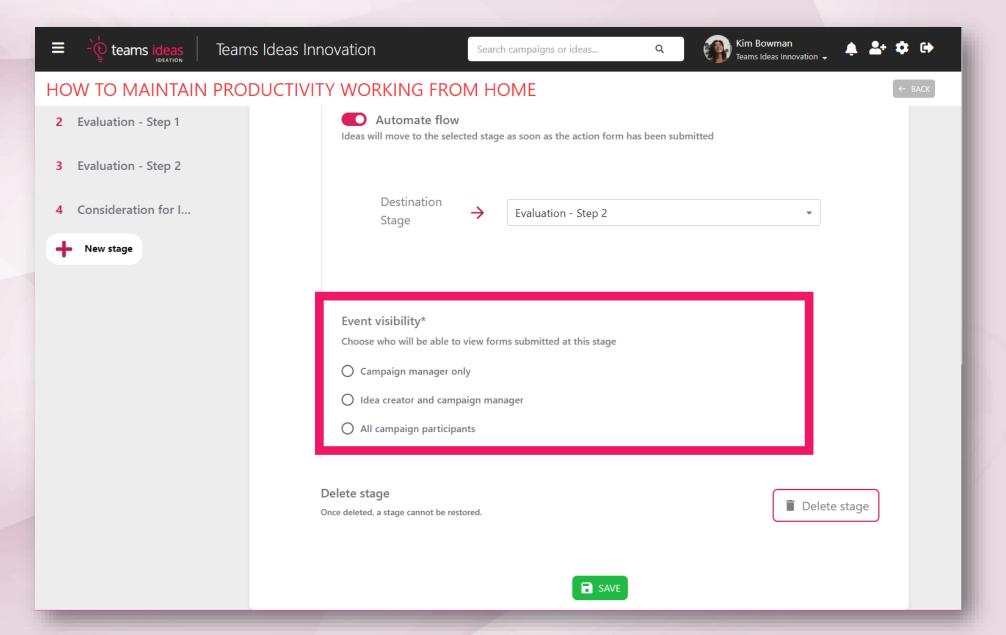
This allows ideas to flow through stages with contributions from selected participants, not needing to be gated by the campaign manager every time.

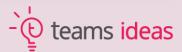




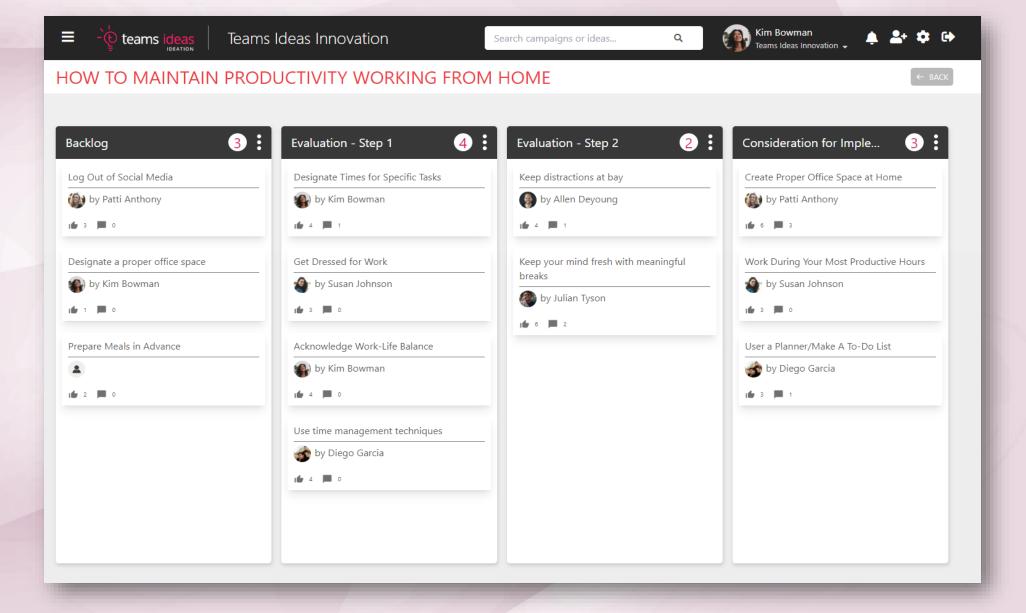
As mentioned, action forms will become a part of their corresponding ideas, however, you may want them to be hidden from some of the users in your campaign.

Choose a more restrictive visibility to create a more intimate process of feedback and development, or a less restrictive one to allow for a more open approach to innovation.





Once you've edited all your stages with the appropriate actions you require and users complete the evaluation steps, your board will eventually begin to look similar to this.





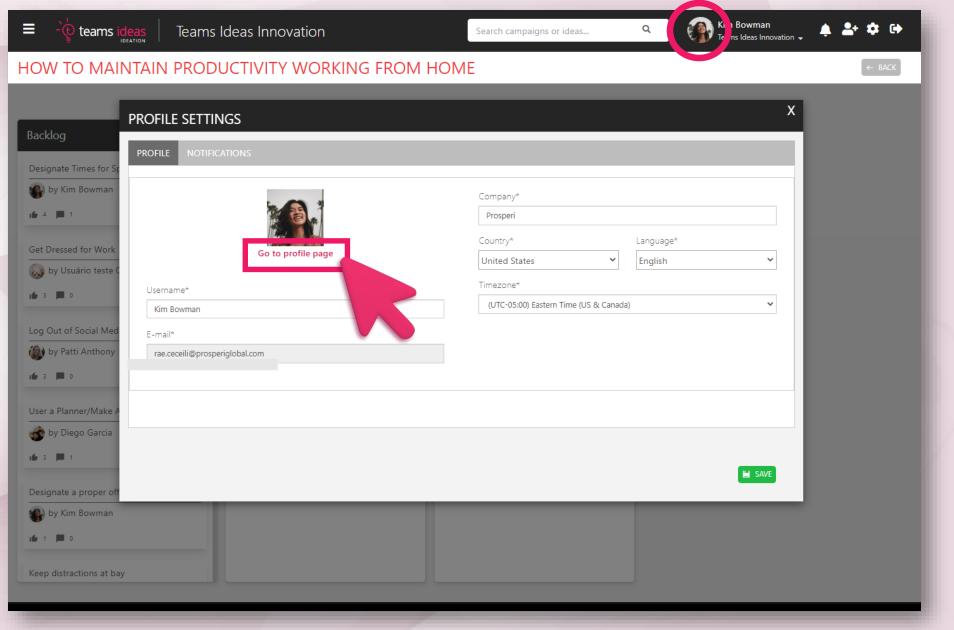
USER PROFILES

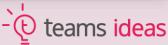
Users can create their own personalized profiles for a more unique and custom experience which allows other colleagues to see the contributions and increase participation. The features provides a skill-building aspect and includes users advancing to different levels, highlighting their top skills with skill analytics, and the opportunity to earn badges.



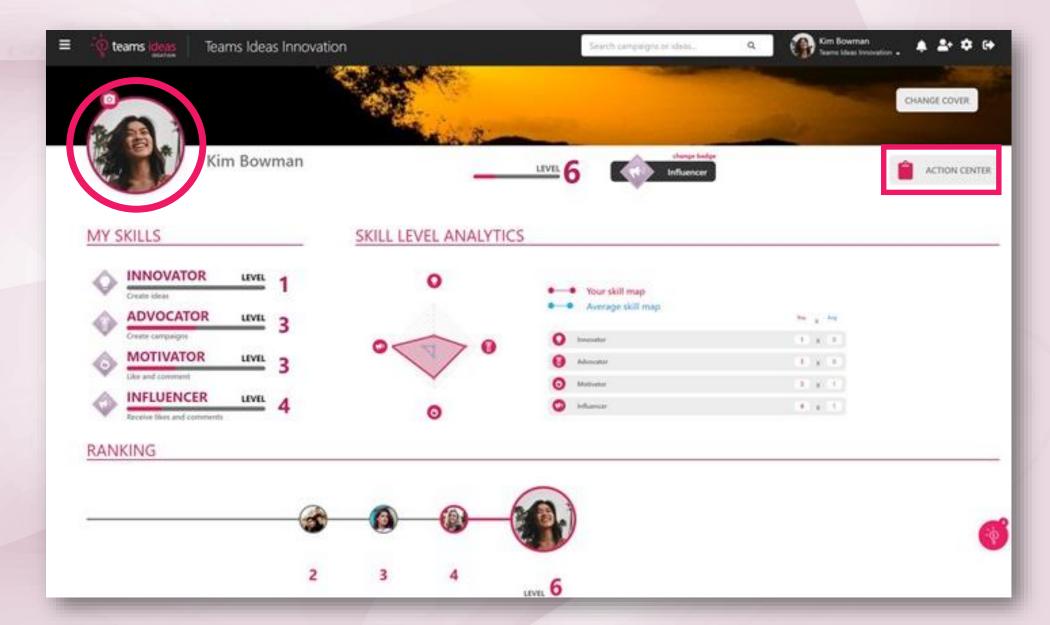
To access your user profile, click your photo by your name in the top right corner of the screen, which will then open your Profile Settings screen.

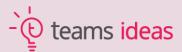
Here you can select your Country, preferred Language, Timezone, etc. You can also access your profile by clicking "Go to profile page".



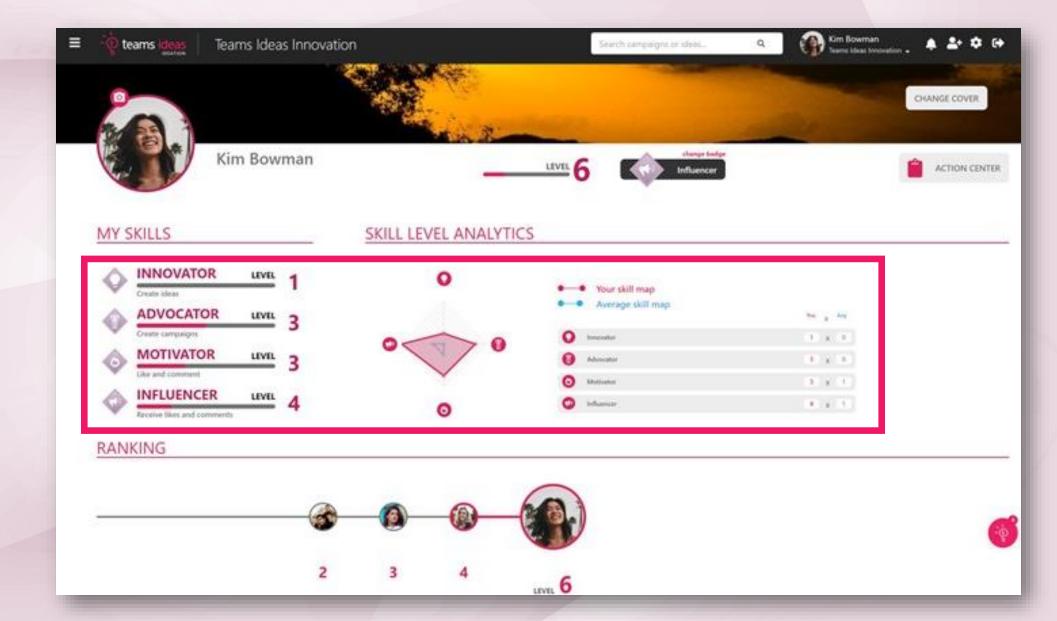


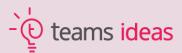
To personalize your profile more, you can change your profile picture and your cover photo by selecting each section to give a more unique feel.





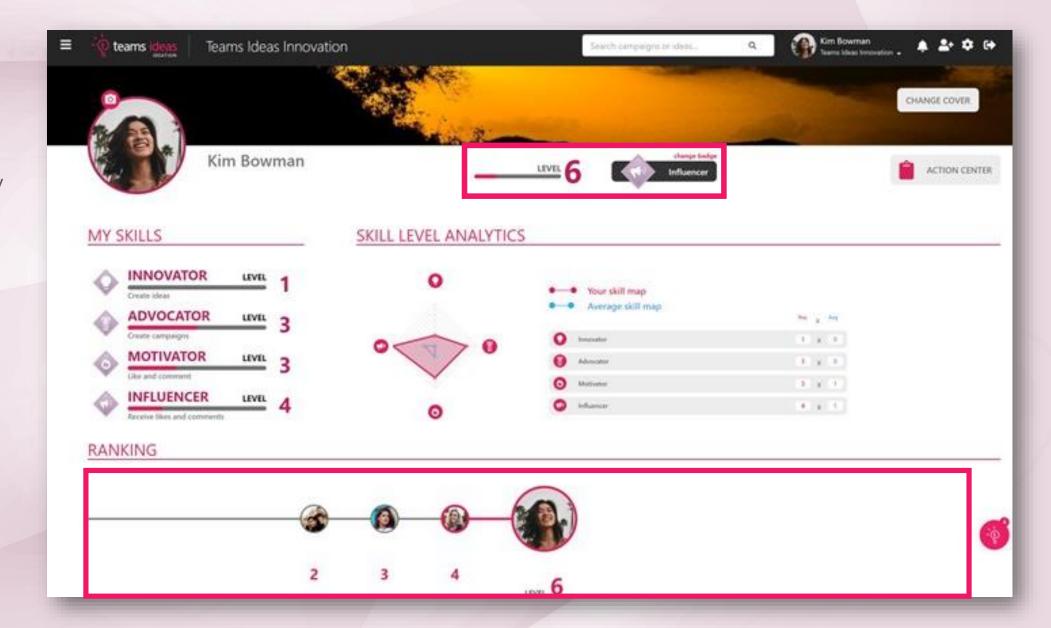
As users collaborate and contribute to the portal, their profile will build points which will show which skill area they are strongest in and how they align compared to others in their portal.





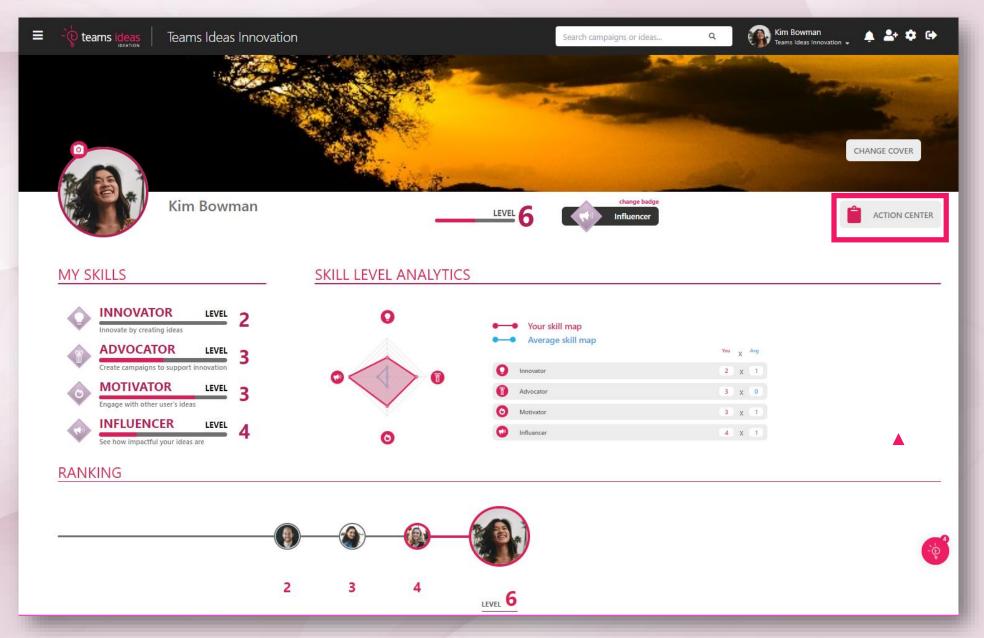
These points will then show what level each user is by providing a ranking. Users will only be able to see the 3 users closest to them, below and above their own ranking.

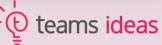
Users can also change their badge to show the skill they want to highlight most.





From the profile is where users can access their own Action Center which is a an easy-to-see, centralized location for all pending actions for that user.





ACTION CENTER

The action center will list all pending actions by campaign, what the user's role is related to that action, and what action needs to be taken so that the idea can continue in its flow of development. Users can easily access and complete each request from this board.

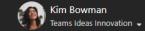


It is where you will find all your pending stage actions each one being an opportunity to help ideas being further developed, whether they be your own or others.



Teams Ideas Innovation

Search campaigns or ideas...





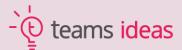


ACTION CENTER

0

Drag a column header here to group by that column					Q Search actions	
Role	Campaign	Idea Y	Date	T	Quick Action	
	Q	Q	Q			
ldea Owner	How to Reduce Long Lines for Customers	Add More Staff During Peak Hours	06/08/2022 11:47		â	
Collaborator	How Can We Digitally Transform our Pro	Integrate customers needs into an app	06/08/2022 11:49		â	
Campaign Manager	Discovery of New Service Offering	Create a Loyalty Program	06/08/2022 11:50		â	
ldea Owner	Discovery of New Service Offering	Create Digital Engagement Campaign	06/08/2022 11:55		Î	
ldea Owner	How to Maintain Productivity Working fr	Designate Times for Specific Tasks	07/20/2022 16:36		ĝ	



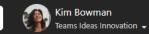


The role column, for instance, helps identifying whether the idea being developed is your own or you are giving feedback on someone else's idea.



Teams Ideas Innovation

Search campaigns or ideas...





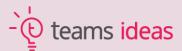


ACTION CENTER

0

Drag a column header here to group by that column					Q Search actions	
tole	Campaign	Idea Y	Date	Y	Quick Action	
	Q	Q	Q	ݨ		
Idea Owner	How to Reduce Long Lines for Customers	Add More Staff During Peak Hours	06/08/2022 11:47		Î	
Collaborator	How Can We Digitally Transform our Pro	Integrate customers needs into an app	06/08/2022 11:49		Î	
Campaign Manager	Discovery of New Service Offering	Create a Loyalty Program	06/08/2022 11:50		Ô	
Idea Owner	Discovery of New Service Offering	Create Digital Engagement Campaign	06/08/2022 11:55		Î	
ldea Owner	How to Maintain Productivity Working fr	Designate Times for Specific Tasks	07/20/2022 16:36		â	





By clicking on it, you will be taken to the form page, where you'll be able to review the idea and fill out an action form in order to complete your action.



Teams Ideas Innovation

Search campaigns or ideas...





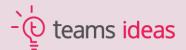


ACTION CENTER

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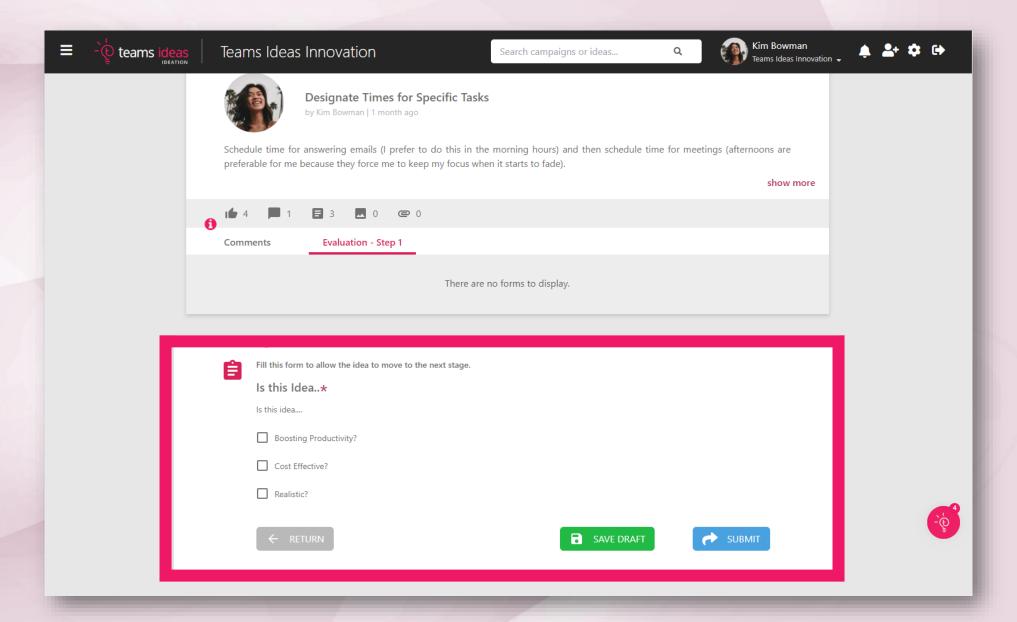
Drag a column header here to group by that column				Q Search actions	
Role	Campaign	Idea Y	Date	Quick	Action
	Q	Q	Q	⊜	
ldea Owner	How to Reduce Long Lines for Customers	Add More Staff During Peak Hours	06/08/2022 11:47		7
Collaborator	How Can We Digitally Transform our Pro	Integrate customers needs into an app	06/08/2022 11:49		7
Campaign Manager	Discovery of New Service Offering	Create a Loyalty Program	06/08/2022 11:50		2
ldea Owner	Discovery of New Service Offering	Create Digital Engagement Campaign	06/08/2022 11:55		7
ldea Owner	How to Maintain Productivity Working fr	Designate Times for Specific Tasks	07/20/2022 16:36		2

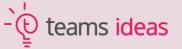




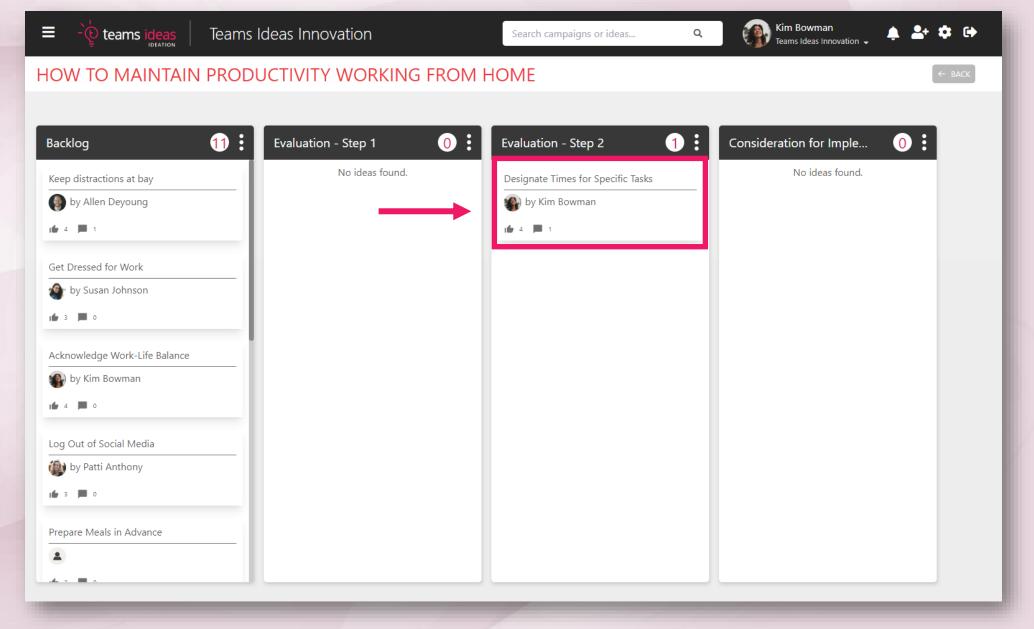
Once opened, you will see the idea and also show the form that needs to be filled out for that stage.

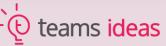
After that, click submit and the pending action will now be completed and the idea will move to the next step (if the flow was automated).





For example, this idea was automated so once it was completed, it automatically moved from Evaluation – Step 1 to Evaluation – Step 2.





MISC. FEATURES

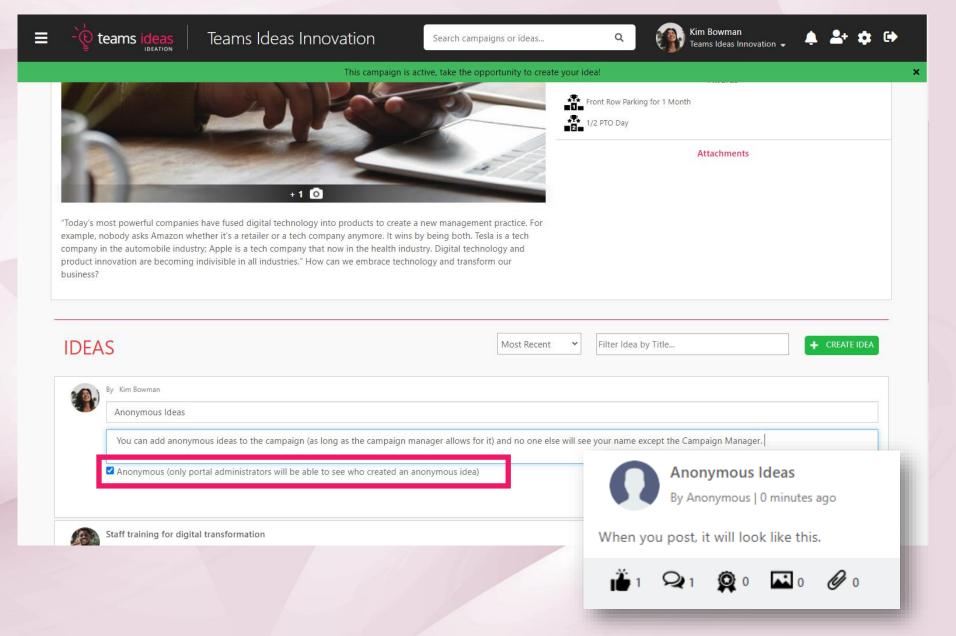
There are some features that have been added within the tool but won't get their own section-shout out just because there is not enough to share. Here we will highlight adding ideas anonymous, new campaign creator configuration options, and more!

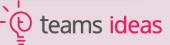


ANONYMOUS IDEAS

Ideas can now be submitted anonymously, however, the campaign creator and manager will have to allow it and will still be able to see the idea owner's identity.

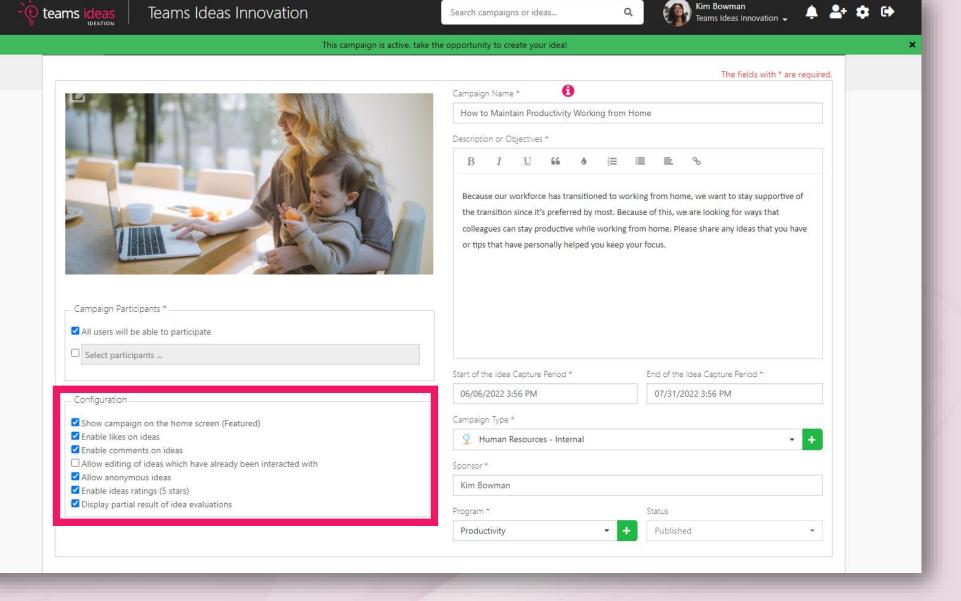
To submit anonymously, select the box and submit the idea.

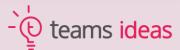




EDITING OF IDEAS

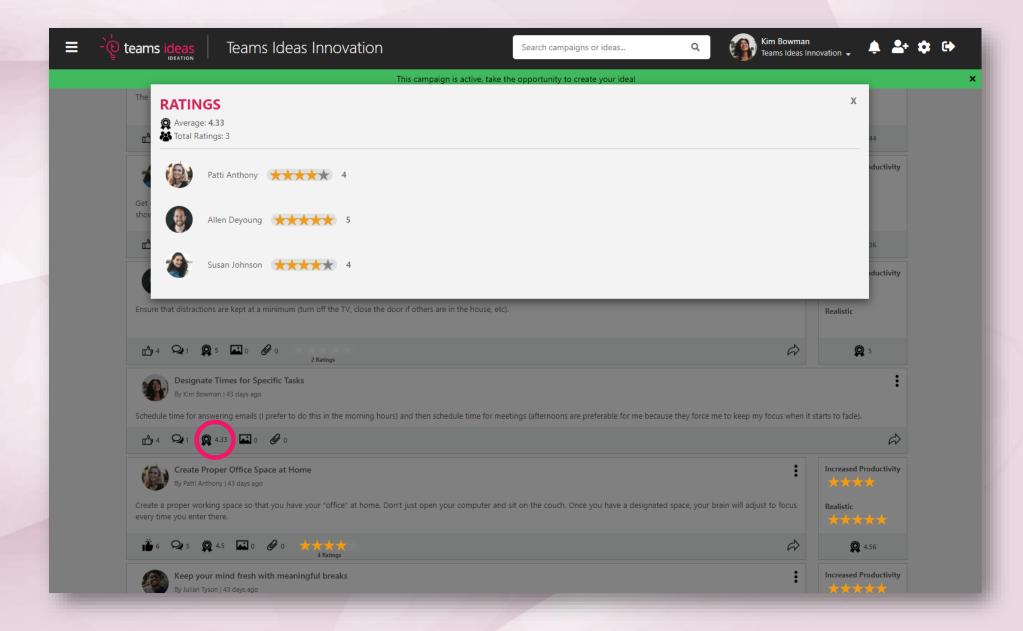
There are new options under Campaign Configurations including the option to allow for anonymous ideas, but also the option to allow users to edit their ideas after they have already been interacted with (someone has commented, liked, etc.).

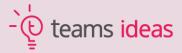




SEEING INDIVIDUAL RATINGS

By clicking on the ribbon icon below any idea, a screen will appear with individual user ratings.





We truly hope you enjoy the use of and reap many benefits from these new features.

If you have any additional questions, feel free to reach out to us at theteam@teamsideas.app

