smartcrowds

improve together

In association with

Scottish Federation of Housing Associations

sfha
Scottish Federation of
Housing Associations

Quick Start Guide

Innovation Management and Organisational Improvement

Contents

About this document

This document is a short guide for general users of smartcrowds, describing how to find and join Challenges that have been launched, contribute Ideas to Challenges, and browse, comment on, react to and rate existing Ideas that have been added by other users.

The document also describes how to find and 'follow' people, groups or ideas, keeping yourself informed of the things that interest you the most.

Overview

smartcrowds is a sophisticated, enterprise Innovation Management and Organisational Improvement solution.

smartcrowds enables organisations to engage with workers and external participants by publishing campaigns, challenges and day to day improvement initiatives, and efficiently collating and managing user **Submissions and Feedback** that can initiate change in the organisation.

smartcrowds progresses all user input through a structured and visible **change management framework** which is delivered within an easy to use **collaborative user forum,** enabling the user community to share their thoughts and collectively contribute to the organisational improvement process.

The solution is a modern web application that is delivered on the Microsoft Cloud.

Getting Started

Welcome to smartcrowds!

We have created a secure account for you within the SFHA smartcrowds Cloud service.

You will have received (or will shortly receive) an email invitation from smartcrowds, from which you can access your account and browse and interact with the system.

When you select the emailed user invitation link, you will be directed to the following page from which you will be prompted to change your password.

Choose a password and hit the **Submit** button to continue. The system will take you to the **Sign In** page (see below).

Signing In to smartcrowds

smartcrowds provides 2 sign-in methods:

- Single-Sign-On (SSO) using Microsoft Active Directory / Office 365 credentials
- Email / password login.

For your account with **SFHA**, only the email/password option should be used.

Enter your email address and the new password you have just created into the fields at the right-hand side of the **Sign In** page and choose the green **Login** button.

If you have used the correct username and password, you will be taken to the smartcrowds homepage for SFHA.

Accessing the smartcrowds URL

To access the system at any time, you can simply enter the URL

https://trial.smartcrowds.com/Account/Login

into your Browser. You may want to save this URL as a Browser favourite for ease of access later.

☁ smartcrowds also works on mobile!

If you wish to use smartcrowds on your mobile device, use the same URL as above on your favourite mobile browser.

You may also wish to add a shortcut to your device's home screen for ease of access:
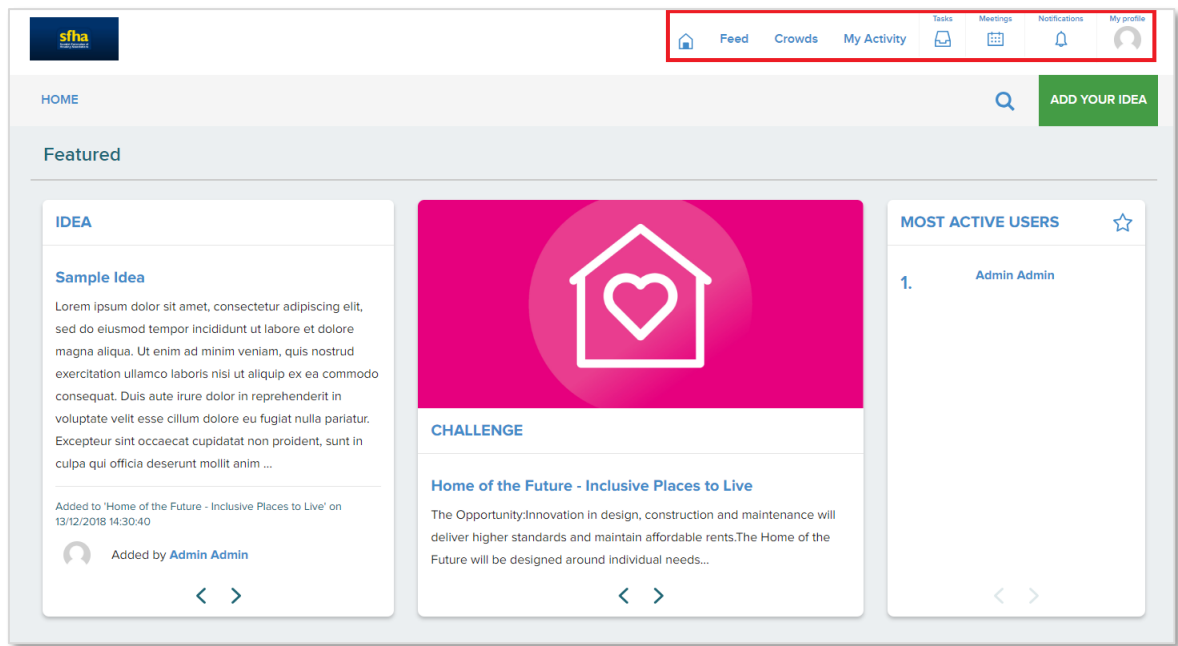
a) On Android (using the Chrome browser app), enter the smartcrowds Sign-In URL and choose the ellipses menu option (⋮) at the top right of the screen. Choose the 'Add to Home Screen' option.
b) On iOS (using the Safari browser app), enter the smartcrowds Sign-In URL and choose Share icon (⬆). Scroll through the options and choose the 'Add to Home Screen' option.
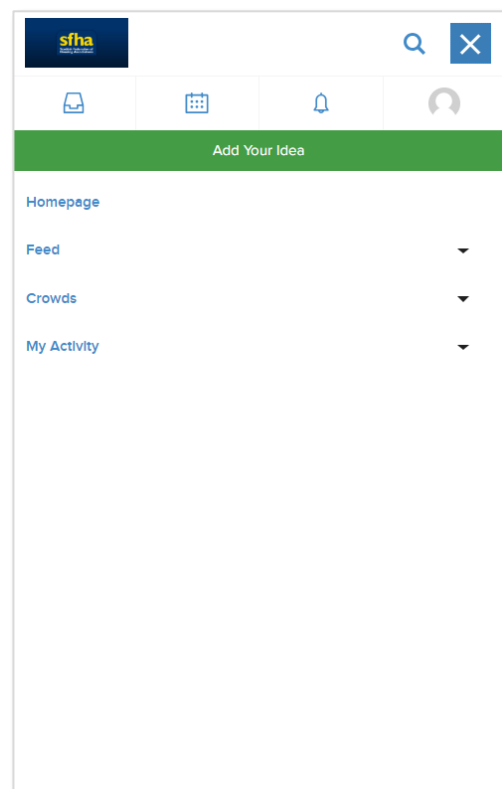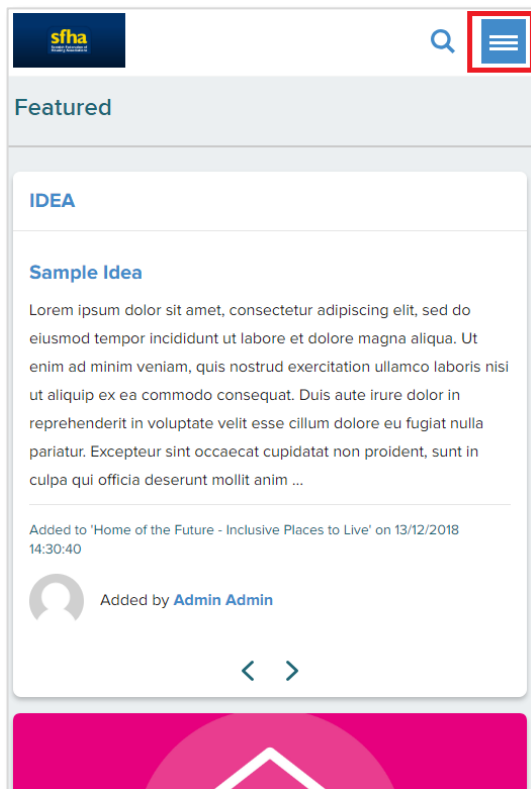
☁ Finding your way around

smartcrowds provides a clean, easy to use interface to access your Crowds and Challenges.

On desktop devices, a **Home** screen similar to the example below will be displayed, showing your available menu options in the red highlighted area.

On mobile devices, the same **Home** screen menu options can be accessed using the *hamburger* menu highlighted in red below. When selected, the menu options will be displayed as shown below on the right-hand screenshot.

smartcrowds Menu Options

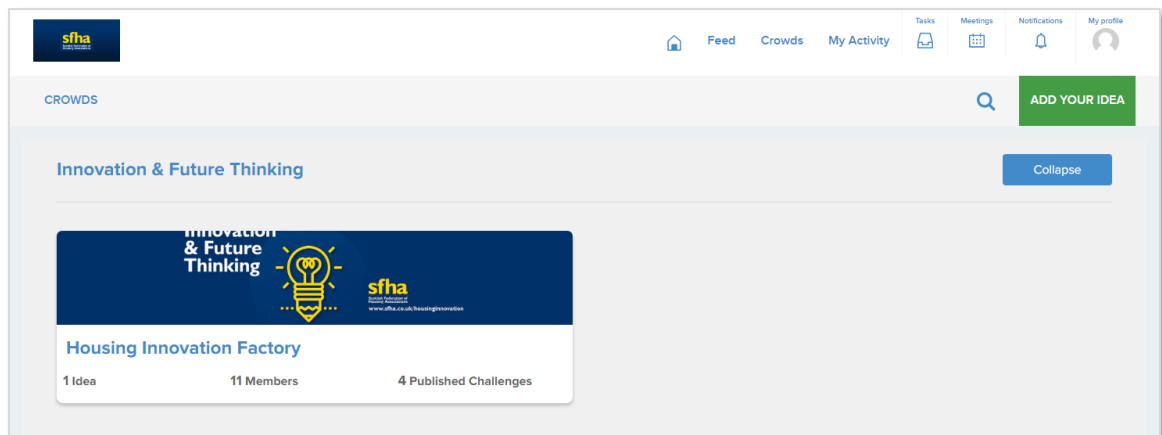On both desktop or mobile versions, the following menu options are available.

Option	Details
Home	Your **Homepage**, showing featured Ideas and Challenges, leaderboards and latest/popular activity across the Crowds that you are a member of.
Feed	A **news/activity feed** page, using popular social feed styling and layouts to keep you up-to-date with the latest things that Crowd members have been submitting into the system.
Crowds	A list of the **Crowds** that you are a member of, with links to the Crowd profile page for each.
My Activity	Access to information that is unique to you, including all **submissions** you have added, any **actions** that have been assigned to you, **surveys** you have been requested to complete, and **meetings** you have been invited to.
Tasks	A list of **tasks** that have been assigned to you. Where new tasks have been added since your last login, a red dot will appear above this icon.
Meetings	A list of **meetings** that you have been invited to. Where new meetings have been added since your last login, a red dot will appear above this icon.
Notifications	A list of **notifications** for your attention. This includes information on Ideas added into Challenges or by people you follow, or more detailed information on Ideas that you follow. Where new notifications have been added since your last login, a red dot will appear above this icon.
My Profile	Details about **your account**. On this page you can change your personal details, including password. The **logout** function is also available from this menu.

Browsing your Crowds

A good way to get started is to browse the **Crowds** that you are a member of.

You are currently a member of the SFHA Crowd **'Housing Innovation Factory'.**

Choose the **Crowds -> My Crowds** option from the main menu. A screen similar to the example below will be displayed.

To find out summary information about this Crowd, roll-over the Crowd image with your mouse pointer (or select the image if you are using a mobile device).

To explore the Crowd fully, click on the Crowd name. This will open the **Crowd Profile** page, which will look similar to the example below.

Here you will find an introduction to the Crowd, along with summary information for each of the Challenges that have been launched in the Crowd.   You can find out more about each Challenge by clicking on the Challenge name or the Read More link.

You can also add an idea to any 'Published' and 'Open' Challenges by choosing the green **+ Add Idea** button at any time.

At the foot of the page, further information may also be presented - for example details about how to get involved, case studies etc.

Accessing Challenges in your Crowd

After selecting a Challenge from a Crowd, the **Challenge Profile** page will be displayed, similar to the example below.

Here you can find more detailed information about the Challenge that has been set, including the deadline stating when the Challenge will close for new submissions, and information on who the Challenge Moderators, Assessors and Authorisers are.

The most recently added Ideas are also listed, with direct links to each Idea.

Adding your own Idea

To add an Idea to your chosen Challenge, choose the **+ Add new Idea** button for that Challenge.

A screen similar to the example below will be displayed, giving you the opportunity to enter your Idea and submit it for assessment.

Some tips on completing your submission are:

- 'Title' and 'Description' are mandatory – you cannot **Save** your idea until these have been added.
- Whilst your 'Title' is limited to 50 characters, your 'Description' can be as long as you like – in fact the more descriptive your idea is the better!
- If your Description is quite long, you can make it more easy on the eye by using the various formatting options to break things up a bit.
- If you want your submission to be anonymous, choose the **Tick to be Anonymous** option. Note that this option will hide your identity from standard Crowd

members, but not from users with the Moderator, Assessor, Group Owner and Admin roles.

- After entering your 'Title', you can choose the **Show Similar** option which will help you find out if someone else has already submitted something similar. This can be a handy way of avoiding duplicate ideas from being added.
- You don't need to add an associated item image, but a well-chosen image can really help spark interest in your idea! To save an image, just choose the **+ Choose Image** button to find and select an image that you have already saved to your device.
- If you do add an image, the best shape to choose is a horizontal rectangle (longer width, shorter height)
- If you want to add supporting documents and/or web links for your idea, you can add as many as you like using the **+ Add Link** or **+ Attach File** options.

When you are happy with your idea, choose **Save** to submit it.
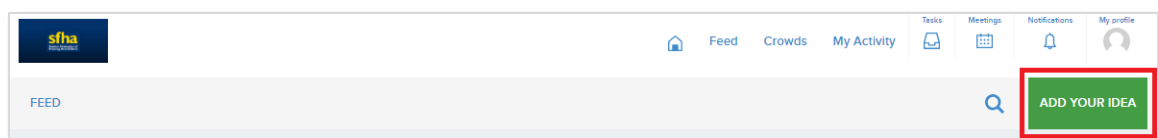
If you choose **Cancel**, your Idea will not be saved.

Quick Add

smartcrowds always provides a **Quick Add** option, no matter what screen you have navigated to.

This can be found under the main menu bar, highlighted in red below.

When you select this option, the following screen is displayed, showing all open Challenges across all Crowds that you are a member of.

To add an Idea to any of these Challenges, simply choose the **+ Add** button for the Challenge of interest to you, and complete the details using the instructions and tips from the previous section.

Checking your Activity Feed

The Activity Feed is a great way to find out what other people in your Crowd have been adding to the system.

To access the Activity Feed, choose the **Feed** option from the main menu. Six sub-options are available.

Option	Details
All Activity	Shows **everything** that has been added, in descending chronological order (most recent at top)
Items	Only shows **Ideas** that have been added, in descending chronological order
Assessments	Only shows **Assessments** that have been added, in descending chronological order

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Plans	Only shows **Plans for change** that have been added, in descending chronological order
Actions	Only shows **Actions** that have been added and assigned to users, in descending chronological order
Outcomes	Only shows **Outcomes** that have been added, in descending chronological order

Getting started with Feed

The easiest way to get started with Feed is to choose the **Items** (i.e. Ideas) sub-menu option. A screen similar to the example below will be displayed, showing all Ideas in the system with the most recent Idea at the top, with scroll capability to browse all ideas.

The **Items** (i.e. Ideas) tab is pre-selected as a filter, and by default the Ideas that are displayed are from all Crowds of which you are a member.

For each Idea (within its own Idea panel), you can:

- View the detail of any Idea by clicking on the Idea title (in the above example "Sample Idea")
- React to or Rate the Idea
- Read any Assessments that have been added to the Idea
- Access any Links or Attachments that have been added to the Idea
- Read, like or respond to any comments that have been added
- Add a new comment of your own

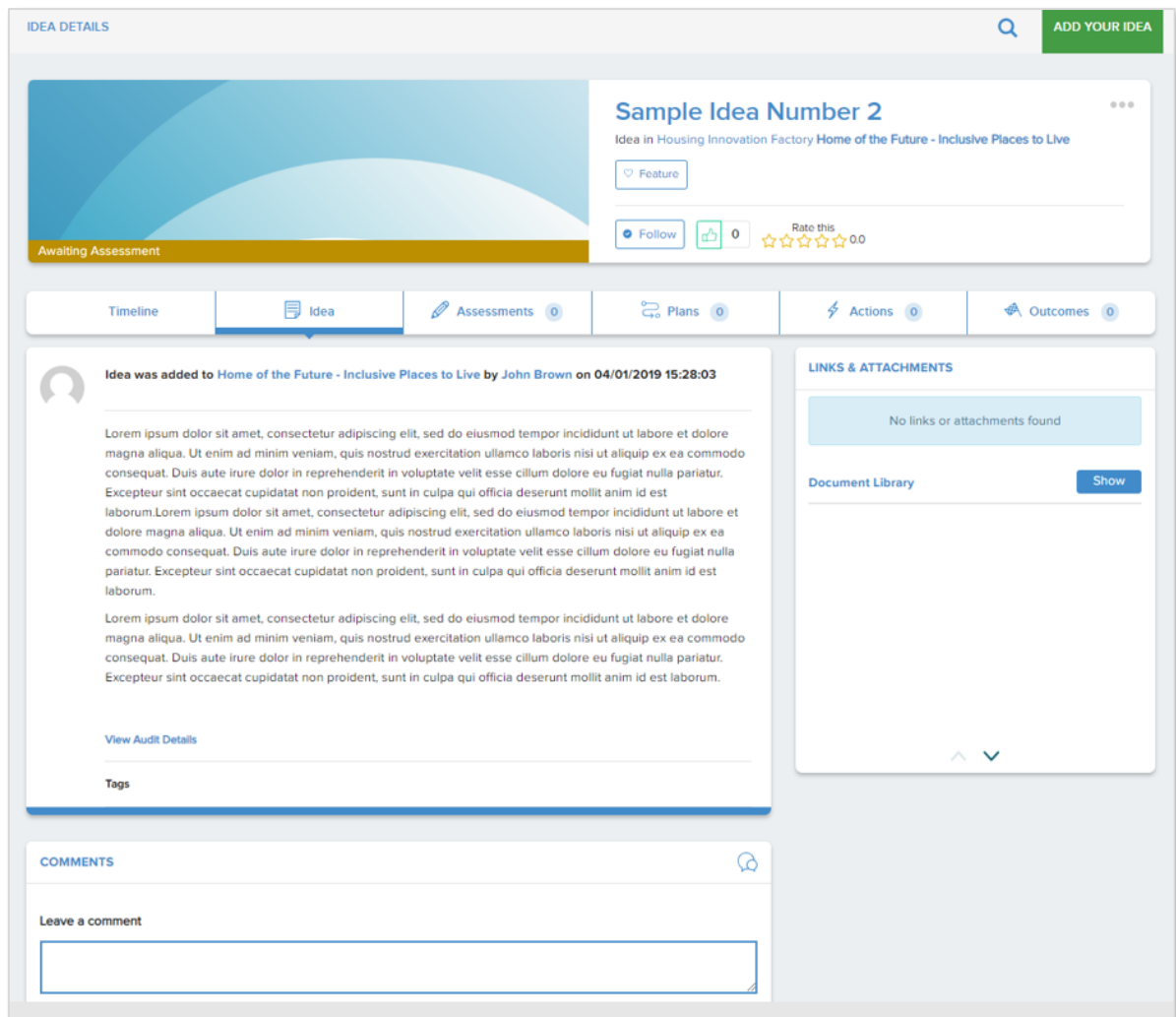## Changing Feed's Display Information

Using the top Tab panel, you can toggle the displayed data between each of the activity types (Ideas, Assessments, Plans, Actions or Outcomes), or by selecting the **All Activity** tab a full chronological history (most recent at top) is displayed that includes each of the activity types.

Using the right-hand side filter panel, filters can be applied to further control the information that is displayed. This panel enables filtering by all Crowds or selected Crowds, and all Groups (in this case Challenges) or selected Groups.

Reading, Reacting to & Rating Ideas

Anytime you click on the title of an Idea in smartcrowds, the **Idea Details** page will be opened, collating together and displaying all of the detail that has been recorded against the Idea, as illustrated below.

As well as browsing the available information, the **Idea Details** page enables you to:

- React to an idea with a thumbs-up or (optionally depending on settings) thumbs-down
- Rate an idea between 1 and 5 stars
- Comment on an idea
- Reply to someone else's comment
- Like someone's comment

Following Challenges, People and Ideas

To keep yourself informed with the things that interest you most, smartcrowds has a 2 Level Follow function, as follows:

Level 1 – Follow **People** and **Challenges**

When you follow a person or a challenge, smartcrowds will notify you **anytime that an Idea is added**:

- by the person you follow, or;
- to the group you follow

Notifications are sent to you by email, including a link directly back to the Idea, and also via the red dot on the notification menu alerting you to new activity.

- **To follow a person**, click on the person's name from anywhere in the system, and choose the **Follow** button that is displayed on the person's profile page. To unfollow, press the button again.

- **To follow a challenge**, find and open the challenge profile page and choose the **Follow** button at the top of the page. To unfollow, press the button again

Level 2 – Follow **Ideas**

When you follow an Idea, you are stating the highest level of interest in that Idea. smartcrowds therefore alerts you **any time any of the following occurs to an Idea**:

- A comment, or reply to a comment is added
- An assessment is added
- A plan is added
- An action is added
- An outcome is added

Notifications are sent to you by email, including a link directly back to the Idea, and also via the red dot on the notification menu alerting you to new activity.

- **To follow an Idea**, find and open the Idea Details page and choose the **Follow** button at the top of the page. To unfollow, press the button again.

Follow your own Submitted Ideas

When you submit an idea, you are treated as a follower of the idea by default, meaning that you will receive the same notifications as those listed above for Level 2 – Follow Ideas.

Note that this cannot be changed, and you will continue to receive notifications until your idea is set to Complete.

CONGRATULATIONS!

You now know pretty much all you need to know to start adding your own Ideas, finding out about what others are adding, and getting more involved by reacting to and commenting on your Crowds activity.

Happy Crowdsourcing!