

Setting up your Stickyworld Room

Customer Success Guide for Organisers No.1

Stickyworld

Welcome

This guide is designed for anyone about to organize a Room on their Stickyworld Portal.

It's a short read and split into easy to digest "How to" chapters taking you through different aspects of the setup.

Each "How to" explains the simple steps to take and provides helpful tips.

If you have any feedback on how we can improve the guide please do let us know. You can contact us at anytime on success@stickyworld.com

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1.1 How-to: create your first Room.

Introduction

By creating a Room you are setting up a time-limited online activity such as a online forum, consultation or design review.

This How-to explains how to create your first Room on your Stickyworld Portal.

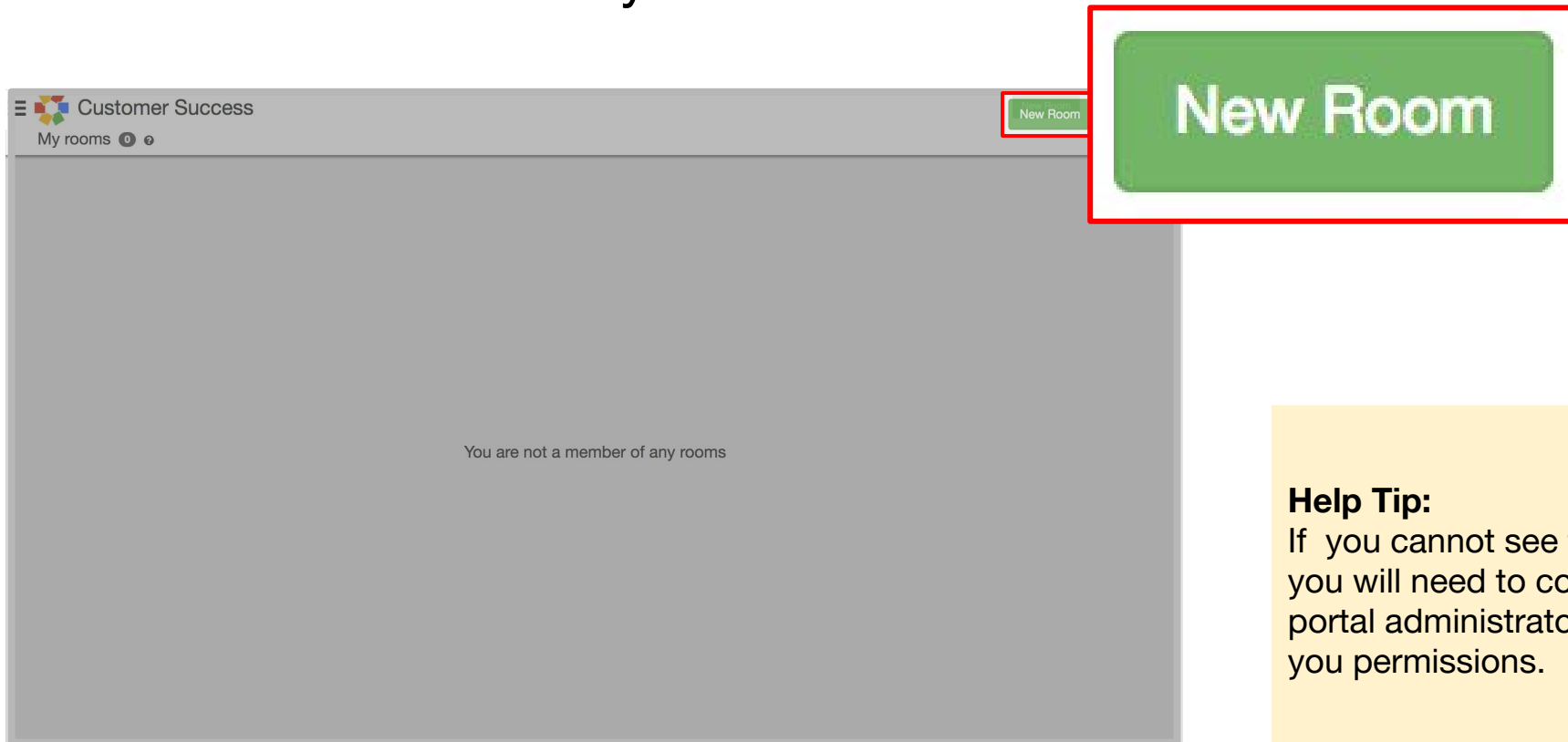
With Stickyworld you are always in control. There are different settings and easy to use tools so you can set up your Room to suit your needs.

It's quick and easy to select what you want, and this 'How to' takes you through the simple steps.

Step 1. Select New Room button

How to: create your first Room

Once signed into a portal, as an organiser, you will see a New Room button at the top of the page. Click on this to open the New Room form which you can edit.



Help Tip:

If you cannot see this button, you will need to contact the portal administrators to send you permissions.

Step 2. Understand New Room form

How to: create your first Room

For every new Room you create, Stickyworld asks you some basic questions so the Room is setup correctly.

Create a room

Room name ⓘ
Add a clear name for this room

Activity label ⓘ
Choose the type of activity for this room

None

Room objective (internal use) ⓘ
Add an objective to describe what this room is for

Select the audience type
All rooms start in draft state until you **publish** on the public portal page or invite your first participant

☐ **Public** ⓘ
The room is listed on the public portal page and anyone can access

☐ **Public unlisted** ⓘ
The room is not listed on the public portal page, anyone with the link can access

☐ **Private** ⓘ
Only private email invitees can access the room

Select the participant's response visibility

☐ **Open forum** ⓘ
Use this setting for transparent project stakeholder, citizen or community engagement

☐ **Private conversations** ⓘ
Use this setting for private customer or consumer engagement

Create Room

Step 3. Add Room name and activity

How to: create your first Room

Add a succinct and clear name for your Room.
Choose your activity from the drop down menu under Activity label

The screenshot shows the 'Create a room' form. A red box highlights the 'Room name' and 'Activity label' sections. A callout points to the 'Room name' input field, which contains 'Madison Road Car Park Consultation'. Another callout points to the 'Activity label' dropdown menu, which is set to 'Consultation'. The form also includes sections for 'Room objective (internal use)', 'Select the audience type' (with options: Public, Public unlisted, Private), and 'Select the participant's response visibility' (with options: Open forum, Private conversations). A 'Create Room' button is at the bottom.

Create a room

Room name ⓘ
Add a clear name for this room

Madison Road Car Park Consultation

Activity label ⓘ ⓘ
Choose the type of activity for this room

Consultation

Room objective (internal use) ⓘ
Add an objective to describe what this room is for

Type your room objective...

Select the audience type
All rooms start in draft state until you publish on the public portal page or invite your first participant

☐ Public ⓘ
The room is listed on the public portal page and anyone can access

☐ Public unlisted ⓘ
The room is not listed on the public portal page, anyone with the link can access

☐ Private ⓘ
Only private email invitees can access the room

Select the participant's response visibility ⓘ

☐ Open forum ⓘ
Use this setting for transparent project stakeholder, citizen or community engagement

☐ Private conversations ⓘ
Use this setting for private customer or consumer engagement

Create Room

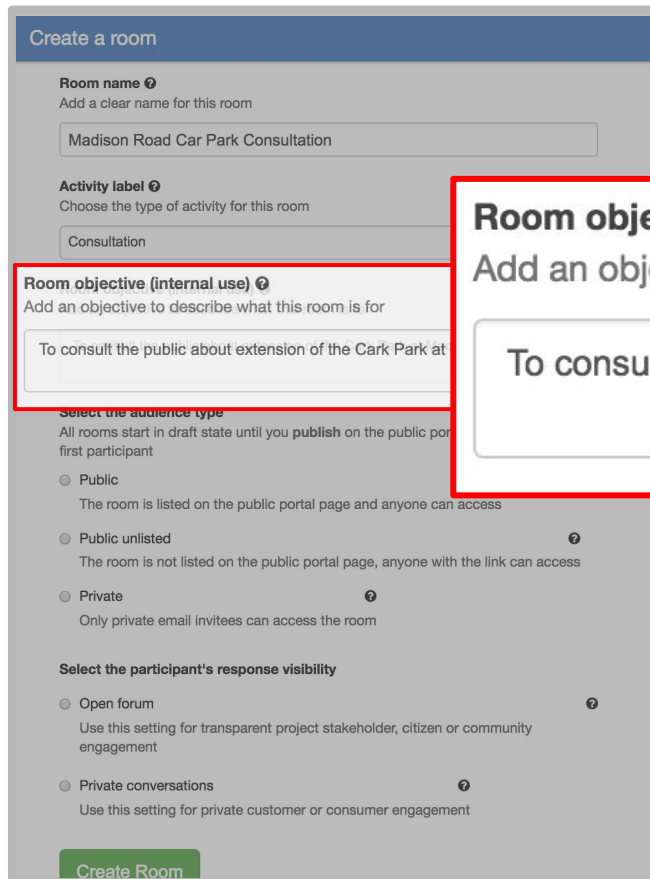
Give a clear short name that makes sense to both participants and organisers. If left blank a Room id will be assigned.

Decide if your activity is a Forum; Consultation; Design Review; Focus Group; Tour; Workshop or listed as Other.

Step 4. Add Room objective

How to: create your first Room

In Room objective add what you want to achieve with your engagement.



Create a room

Room name ⓘ
Add a clear name for this room
Madison Road Car Park Consultation

Activity label ⓘ
Choose the type of activity for this room
Consultation

Room objective (internal use) ⓘ
Add an objective to describe what this room is for
To consult the public about extension of the Car Park at

Select the audience type
All rooms start in draft state until you publish on the public portal page to the first participant

- ☐ Public
The room is listed on the public portal page and anyone can access
- ☐ Public unlisted ⓘ
The room is not listed on the public portal page, anyone with the link can access
- ☐ Private ⓘ
Only private email invitees can access the room

Select the participant's response visibility ⓘ

- ☐ Open forum ⓘ
Use this setting for transparent project stakeholder, citizen or community engagement
- ☐ Private conversations ⓘ
Use this setting for private customer or consumer engagement

Create Room

Room objective (internal use) ⓘ

Add an objective to describe what this room is for

To consult the public about extension of the Car Park at Madison Road

Help your co-organisers understand why you set up the Room and what you are trying to achieve.

Step 5. Select audience type

How to: create your first Room

Choose who you want to engage. Do you want your Room to be public, public but not listed on your portal, or private?

Create a room

Room name ⓘ
Add a clear name for this room
Madison Road Car Park Consultation

Activity label ⓘ
Choose the type of activity for this room
Consultation

Room objective (internal use) ⓘ
Add an objective to describe what this room is for
To consult the public about extension of the Car Park at Madison Road

Select the audience type ⓘ
All rooms start in draft state until you **publish** on the public portal page or invite your first participant

- ☒ **Public** ⓘ
The room is listed on the public portal page and anyone can access
- ☐ **Public unlisted** ⓘ
The room is not listed on the public portal page, anyone with the link can access
- ☐ **Private** ⓘ
Only private email invitees can access the room

☐ **Open forum** ⓘ
Use this setting for transparent project stakeholder, citizen or community engagement

☐ **Private conversations** ⓘ
Use this setting for private customer or consumer engagement

Create Room

All Rooms start in a draft state until you publish on the public portal page, or invite your first participant.

A public unlisted Room is helpful if you are running a forum, for example, and only want the attendees to participate.

Select the audience type

All rooms start in draft state until you **publish** on the public portal page or invite your first participant

- ☒ **Public** ⓘ
The room is listed on the public portal page and anyone can access
- ☐ **Public unlisted** ⓘ
The room is not listed on the public portal page, anyone with the link can access
- ☐ **Private** ⓘ
Only private email invitees can access the room

Step 6: Select response visibility.

How to: create your first Room

Response visibility controls whether participants can see each other's comments/ responses. Choose what's right for your project.

Create a room

Room objective (internal use) ⓘ
Add an objective to describe what this room is for

To consult the public about extension of the Cark Park at Madison Road

Select the audience type
All rooms start in draft state until you **publish** on the public portal page first participant

- ☒ **Public**
The room is listed on the public portal page and anyone can access it
- ☐ **Public unlisted**
The room is not listed on the public portal page, anyone with the link can access it
- ☐ **Private** ⓘ
Only private email invitees can access the room

Select the participant's response visibility

- ☒ **Open forum**
Use this setting for transparent project stakeholder, citizen or community engagement
- ☐ **Post-moderation**
Comments and replies are published automatically and can be flagged for your attention
 - ☐ Public visitor comments to be published automatically
- ☐ **Pre-moderation**
Comments and replies require your approval to be published
- ☐ **Private conversations** ⓘ
Use this setting for private customer or consumer engagement

Forum settings

☒ **Post-moderation**
Comments and replies are published automatically and can be flagged for your attention

☐ Public visitor comments to be published automatically

☐ **Pre-moderation**
Comments and replies require your approval to be published

☐ **Private conversations** ⓘ
Use this setting for private customer or consumer engagement

Create Room

?

“Open Forum” means each participant can see and possibly reply to other participant comments. There are moderation settings you can apply.

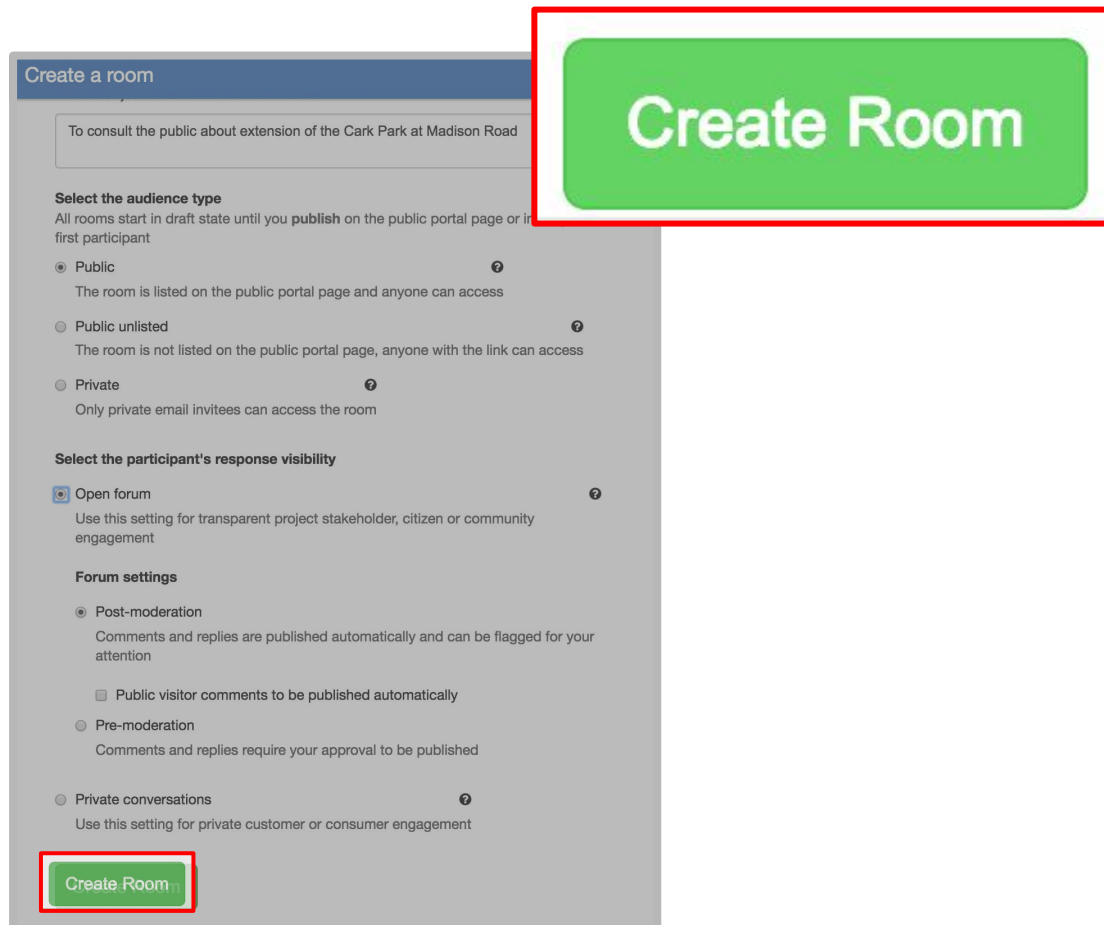
?

“Private conversations” mean that participant conversations are never shown to other participants.

Step 7: Create your Room

How to: create your first Room

Once you have selected your options, click the green button Create Room.



The screenshot shows the 'Create a room' interface. At the top, there is a title bar 'Create a room' and a text input field containing 'To consult the public about extension of the Cark Park at Madison Road'. Below this, the form is divided into several sections:

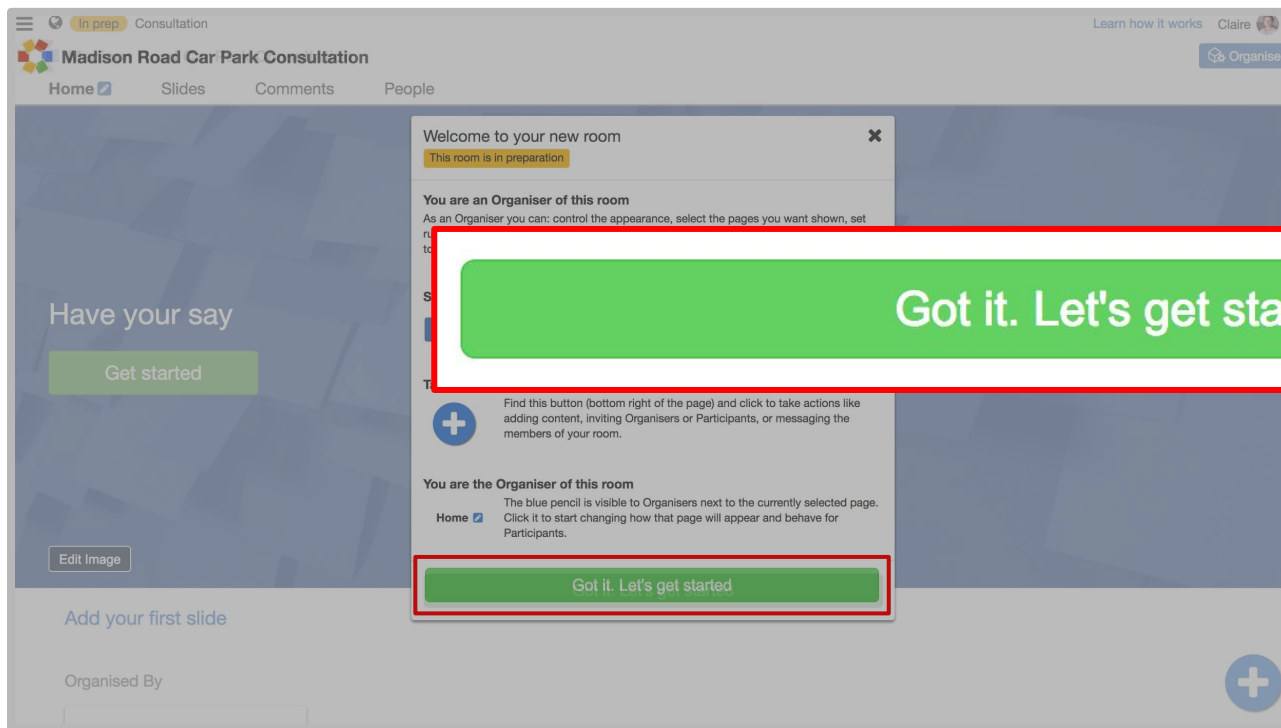
- Select the audience type**: This section includes a sub-header 'All rooms start in draft state until you **publish** on the public portal page or in first participant'. It contains three radio button options: 'Public' (selected), 'Public unlisted', and 'Private'. Each option has a brief description of its access level.
- Select the participant's response visibility**: This section contains a radio button option 'Open forum' (selected), with a description: 'Use this setting for transparent project stakeholder, citizen or community engagement'.
- Forum settings**: This section contains two radio button options: 'Post-moderation' (selected) and 'Pre-moderation'. The 'Post-moderation' option has a checkbox 'Public visitor comments to be published automatically' which is currently unchecked. Below these is a radio button option 'Private conversations'.

At the bottom left of the form, there is a green button labeled 'Create Room'. A large, semi-transparent green button with the text 'Create Room' is overlaid on the right side of the form, also highlighted by a red rectangular border.

Step 8. Read welcome pop up

How to: create your first Room

You will receive a welcome pop up. Read this through and click the green button Got it. Let's Get Started.



You've created your first Room

Congratulations! You have now created your first Room on your portal customising it to your exact requirements.

What's next?

Next, have a look at 'How-to: set the timeframe for your engagement'.

1.2 How-to: set the timeframe for your engagement.

Introduction

Setting a timeframe for when your Room opens/closes gives you control over when your engagement starts/finishes.

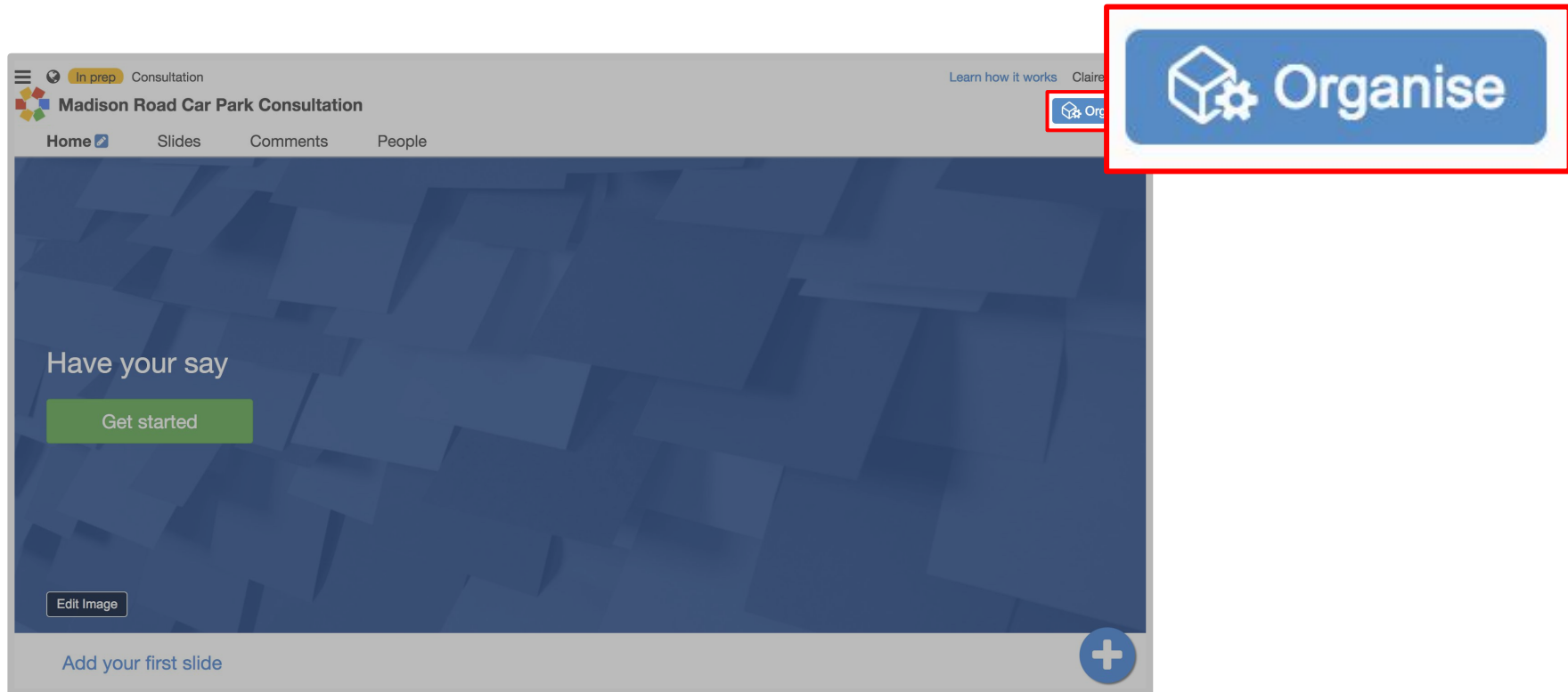
This How-to explains how to set the timeframe for your engagement.

The yellow In Prep tag indicates you are currently in preparation. Only you and your invited co-organizers can see this Room.

Step 1. Select Organise button

How to: set the timescale for your engagement

Click the blue Organise button in the header. This opens a Summary page you can edit.



Step 2. In Summary find Timeframe

How to: set the timescale for your engagement

In your Summary page look for the Timeframe which you can then edit.

The screenshot displays the Stickyworld interface for a consultation room titled "Madison Road Car Park Consultation". The interface is divided into several sections: "Room Details", "Target Audience", "Timeframe", and "Engagement". The "Timeframe" section is highlighted with a red box, indicating the area where the timescale for the engagement can be set. The "Engagement" section provides summary statistics for the consultation.

Room Details

ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-

Target Audience

Access	Public
Invitees	-

Timeframe

Created on	13/11/2017 13:52
Open scheduled for	-
Opened on	-
Close scheduled for	-
Closed on	-

Engagement

Total views	1
Total responses	-
Total members	1
Last participant visit	13/11/2017 13:52

Step 3. Add the start date

How to: set the timescale for your engagement

In Timeframe, click on the blue pencil next to Open scheduled for to edit your Room's opening date and time. Click Save.

The screenshot displays the Stickyworld interface for a consultation room titled "Madison Road Car Park Consultation". The interface is divided into two main sections: "Room Details" on the left and "Timeframe" on the right. The "Room Details" section includes fields for ID, URL, Name, Headline, Primary organiser, Activity label, Objective, Conclusion, Target Audience, Access, and Invitees. The "Timeframe" section includes a "Created on" timestamp and a "Timeframe" table with rows for "Open scheduled for", "Opened on", "Close scheduled for", and "Closed on". The "Open scheduled for" row is highlighted with a red box, and a modal dialog is open over it, allowing the user to edit the start date and time. The modal contains two input fields: "24/11/2017" and "14:00", and a "Save" button. The "Engagement" section at the bottom right shows statistics for Total views, Total responses, Total members, and Last participant visit.

Room Details

ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-
Target Audience	Public
Access	Public
Invitees	-

Timeframe

Created on 13/11/2017 13:52

Open scheduled for	24/11/2017 14:00
Opened on	-
Close scheduled for	-
Closed on	-

Engagement

Total views	1
Total responses	-
Total members	1
Last participant visit	13/11/2017 13:52

Step 4. Add the closing date

How to: set the timescale for your engagement

Follow the same process for editing when you want to close your Room. Remember to click Save.

The screenshot displays the Stickyworld interface for a consultation room titled "Madison Road Car Park Consultation". The interface is divided into two main sections: "Room Details" on the left and "Timeframe" on the right. The "Room Details" section includes fields for ID, URL, Name, Headline, Primary organiser, Activity label, Objective, Conclusion, Target Audience, Access, and Invitees. The "Timeframe" section includes fields for Created on, Open scheduled for, Opened on, Close scheduled for, Closed on, Total views, Total responses, Total members, and Last participant visit. A modal window titled "Close scheduled for" is open, showing a date picker set to 20/12/2017 and a time picker set to 14:00, with a "Save" button below. The modal is highlighted with a red border. The "Close scheduled for" field in the "Timeframe" section is also highlighted with a red border.

Room Details

ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-
Target Audience	Public
Access	Public
Invitees	-

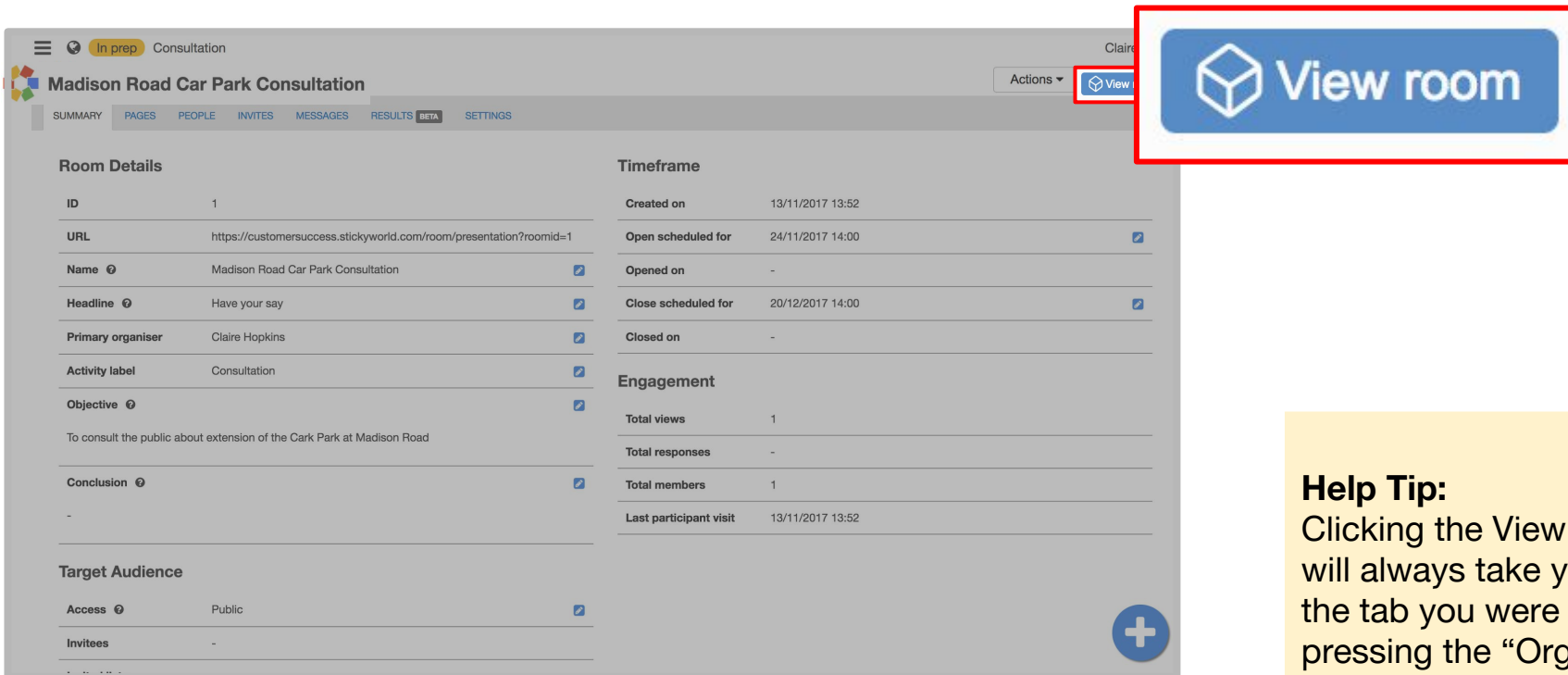
Timeframe

Created on	13/11/2017 13:52
Open scheduled for	24/11/2017 14:00
Opened on	-
Close scheduled for	20/12/2017 14:00
Closed on	-
Total views	1
Total responses	-
Total members	1
Last participant visit	13/11/2017 13:52

Step 5. Select View Room button

How to: set the timescale for your engagement

Click 'View room' in the header to return to your Room's landing page.



The screenshot shows the Stickyworld interface for a room titled "Madison Road Car Park Consultation". The room is in the "In prep" state. The header includes a navigation bar with tabs: SUMMARY, PAGES, PEOPLE, INVITES, MESSAGES, RESULTS, META, and SETTINGS. The "View room" button is highlighted with a red box. The main content area is divided into three sections: Room Details, Timeframe, and Engagement.

Room Details	
ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-
Target Audience	
Access	Public
Invitees	-

Timeframe	
Created on	13/11/2017 13:52
Open scheduled for	24/11/2017 14:00
Opened on	-
Close scheduled for	20/12/2017 14:00
Closed on	-

Engagement	
Total views	1
Total responses	-
Total members	1
Last participant visit	13/11/2017 13:52

Help Tip:
Clicking the View Room button will always take you back to the tab you were using before pressing the "Organise" button.

You've set the timeframe for your Room

Great. You have now set when you want to start and finish your engagement.

What's next?

Next, have a look at 'How-to: invite a co-organiser'.

1.3 How-to: invite a co-organiser.

Introduction

Having a co-organiser means you'll have help in managing your Room.

This How-to explains how to invite a colleague to help you set up and organize your Room.

The yellow In Prep tag indicates you are currently in preparation. Only you and your invited co-organizers can see this Room.

Step 1. Select organizer action button

How to: invite a co-organiser

Click on the organizer action button.
A menu will appear.



Stickyworld interface showing the 'Madison Road Car Park Consultation' room details. The interface includes tabs for SUMMARY, PAGES, PEOPLE, INVITES, MESSAGES, RESULTS (BETA), and SETTINGS. The room details are organized into sections: Room Details, Timeframe, Engagement, and Target Audience.

Room Details

ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-

Timeframe

Created on	13/11/2017 13:52
Open scheduled for	24/11/2017 14:00
Opened on	-
Close scheduled for	20/12/2017 14:00
Closed on	-

Engagement

Total views	2
Total responses	-
Total members	1
Last participant visit	16/11/2017 15:50

Target Audience

Access	Public
Invitees	-

A small blue circular button with a white plus sign is located in the bottom right corner of the interface, highlighted by a red square border.

Step 2. Select Invite organisers

How to: invite a co-organiser

In the menu, you will see Invite organisers.
Click on this to open the Invite organisers form.

Invite organisers

The screenshot shows the Stickyworld interface for a consultation room titled "Madison Road Car Park Consultation". The interface is divided into several sections: Room Details, Timeframe, Engagement, and Target Audience. A red box highlights the "Invite organisers" option in the engagement menu.

Room Details

ID	1
URL	https://customersuccess.stickyworld.com/room/presentation?roomid=1
Name	Madison Road Car Park Consultation
Headline	Have your say
Primary organiser	Claire Hopkins
Activity label	Consultation
Objective	To consult the public about extension of the Car Park at Madison Road
Conclusion	-

Timeframe

Created on	13/11/2017 13:52
Open scheduled for	24/11/2017 14:00
Opened on	-
Close scheduled for	20/12/2017 14:00
Closed on	-

Engagement

Total views	2
Total responses	-
Total members	1
Last participant visit	16/11/2017 15:50

Target Audience

Access	Public
Invitees	-

Engagement Menu:

- Add a comment
- Invite participants
- Send a message
- Invite organisers**
- Add a slide
- Add info note

Step 3. Add email address

How to: invite a co-organiser

Type in the email address of the person you want to invite and click enter. Or, you can issue invitations to a pre-prepared list. We explain how to prepare this list in another How-to Guide.

The screenshot shows the 'Invite organisers' interface. A red box highlights the 'Add email' and 'Invite from a list' sections. The 'Add email' section contains a text input field with the email address 'x michael@stickyworld.com' and a vertical bar. The 'Invite from a list' section contains a text input field with the text 'Contact list'. Below these sections is the 'Add a message' section, which contains a text area with the message 'Please help me organise the Madison Road Car Park Consultation. Thanks.' and a green circular icon. At the bottom of the interface is a blue button labeled 'Send Invite'.

Invite organisers ⓘ

Add email

x michael@stickyworld.com |

Invite from a list

Contact list

Add a message

Please help me organise the Madison Road Car Park Consultation.
Thanks.

Send Invite

Step 4: Include a message

How to: invite a co-organiser

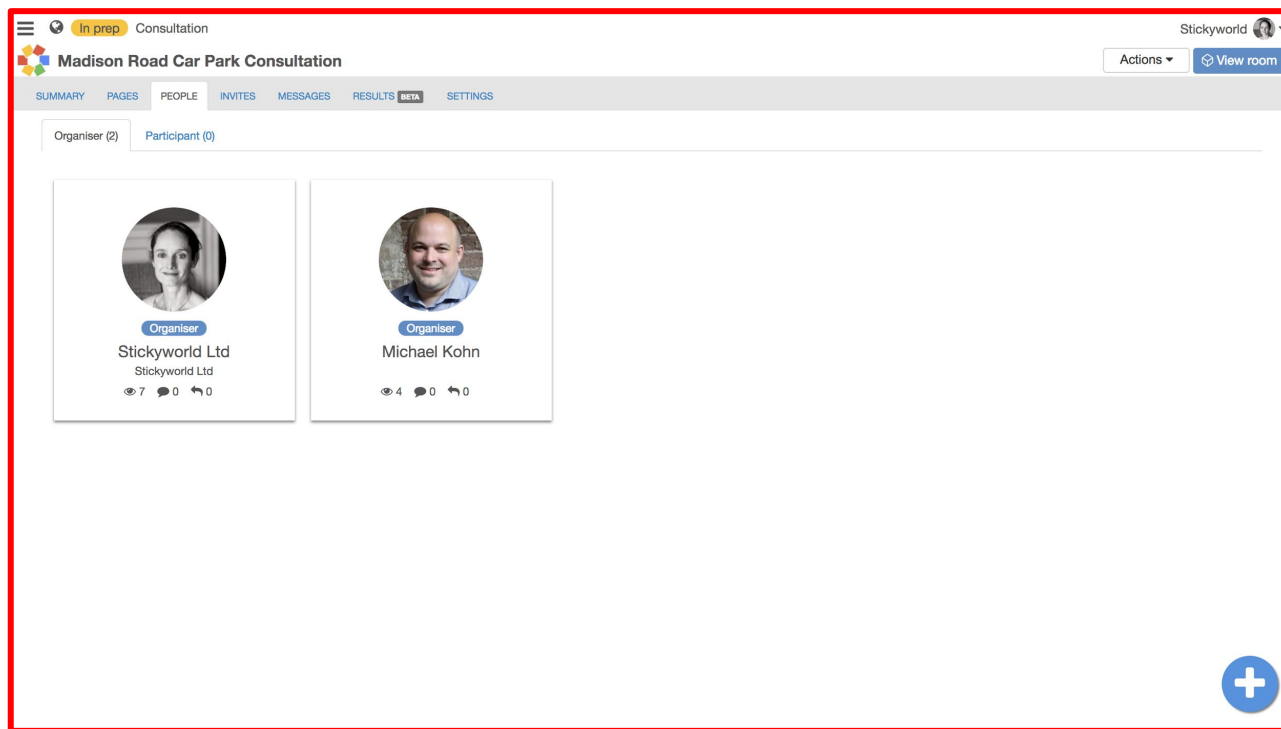
Customise the message you want to add to your invitation. Then click the blue Send invite button.

The screenshot displays the 'Invite organisers' interface. On the left, a sidebar contains options: 'Invite organisers ?' (with a help icon), 'Add email' (with a text input field containing 'x michael@stickyworld.com'), and 'Invite from a list' (with a 'Contact list' button). The main area is titled 'Add a message' and features a large text input field containing the message: 'Please help me organise the Madison Road Car Park Consultation. Thanks.' A red rectangular box highlights this message input area. At the bottom of the main area is a blue button labeled 'Send Invite'.

Step 5. Check your People page

How to: invite a co-organiser

After a few seconds you will receive a message to say that the invite was sent successfully. Your invitees will be notified by email. Once they accept they will be listed on the People page.



You've invited a co-organiser for your Room

That's it. You have now invited someone else to organize your Room with you.

What's next?

Next, have a look at the Customer Success Guide No 2: 'Creating content in your Stickyworld Room'.

Meet the Stickyworld team who can help you

You'll always find one of the team is available in the in-app support channel and able to help you.

Click the Help button which you will find under your profile, and then Contact Support.



Michael



Chris



Claire



Karsh

Thanks for reading

We hope this guide on how to set up your Stickyworld Room has been helpful.

If you have any feedback on how we can improve the guide please do let us know. You can contact us at anytime on success@stickyworld.com

Get in touch with your questions:

success@stickyworld.com

Stickyworld