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

Contents

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1.1 How-to: create your first Room.

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Introduction

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

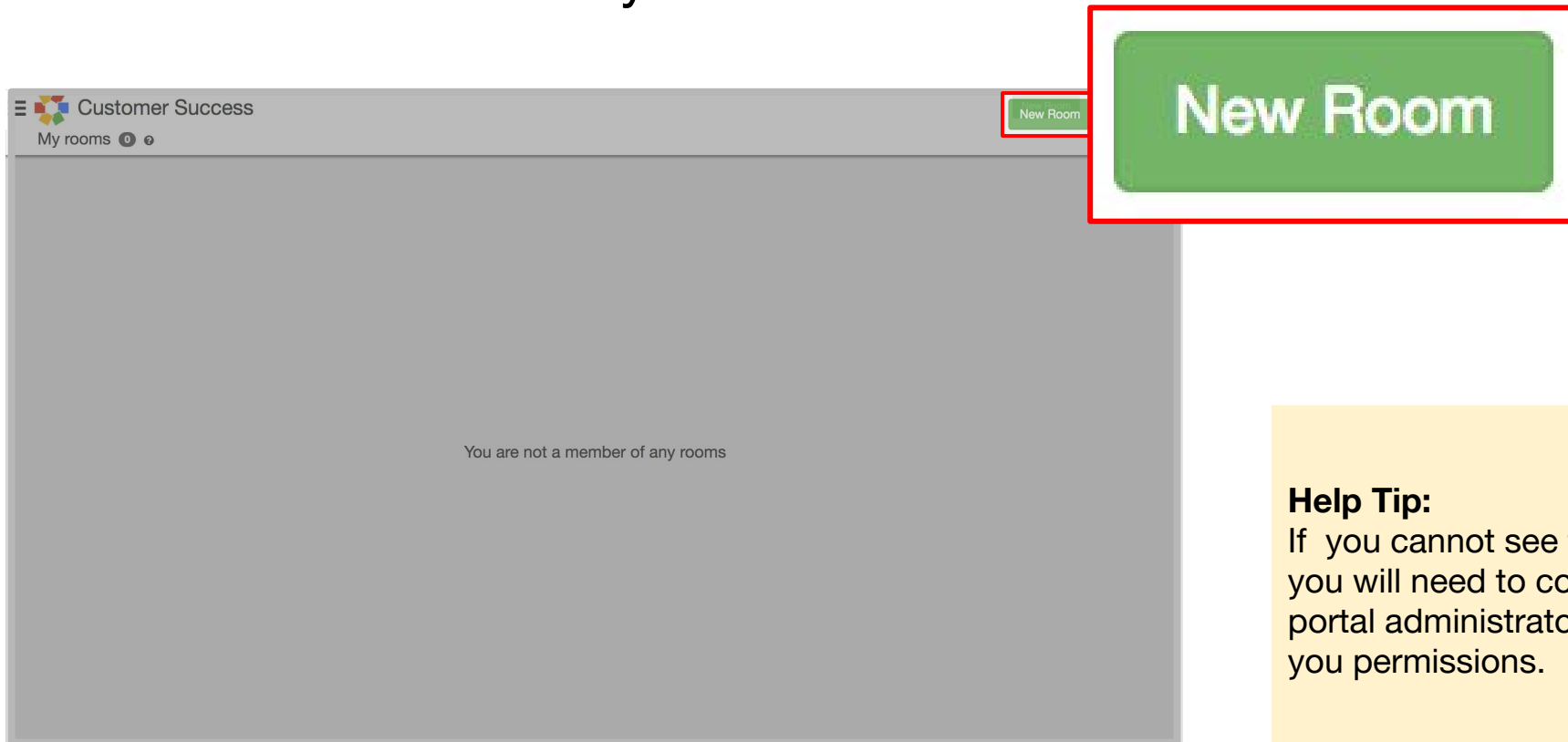This How-to explains how to create your first Room on your Stickyworld Portal.

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

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.

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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

[Your new room name...]

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

[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 ❓
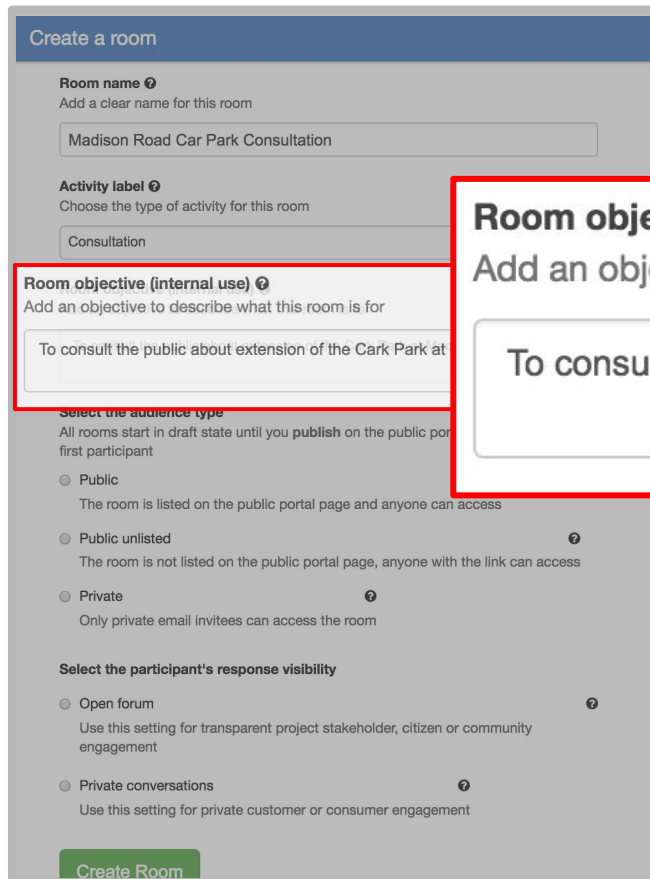Use this setting for private customer or consumer engagement

[Create Room]

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

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 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
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○ Public ❓
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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.

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Step 4. Add Room objective

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 Cark Park at

Select the audience type
All rooms start in draft state until you **publish** on the public portal
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 Cark Park at Madison Road

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

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Step 5. Select audience type

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

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.

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 Cark Park at Madison

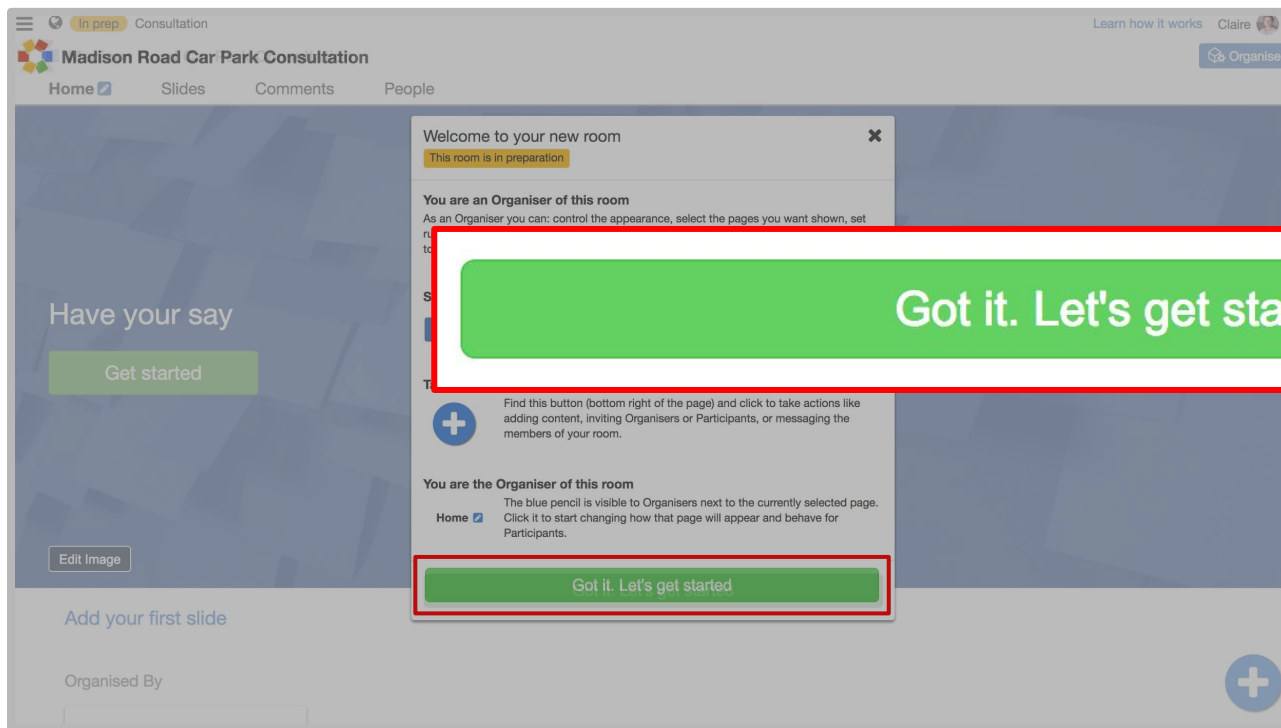**Select the audience type**
All rooms start in draft state until you **publish** on the public portal page or invite your first participant

○ 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

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Step 6: Select response visibility.

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 acces

Public unlisted
The room is not listed on the public portal page, anyone with the li

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 com engagement

Forum settings

Post-moderation
Comments and replies are published automatically and can be 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

Select the participant's response visibility

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

"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.

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Step 7: Create your Room

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

Step 8. Read welcome pop up

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'.

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

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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

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

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Step 2. In Summary find Timeframe

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

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Step 3. Add the start date

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

Step 4. Add the closing date

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

Step 5. Select View Room button

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

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

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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'.

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1.3   How-to: invite a co-organiser.

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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

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

Step 2. Select Invite organisers

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

Step 3. Add email address

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.

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Step 4: Include a message

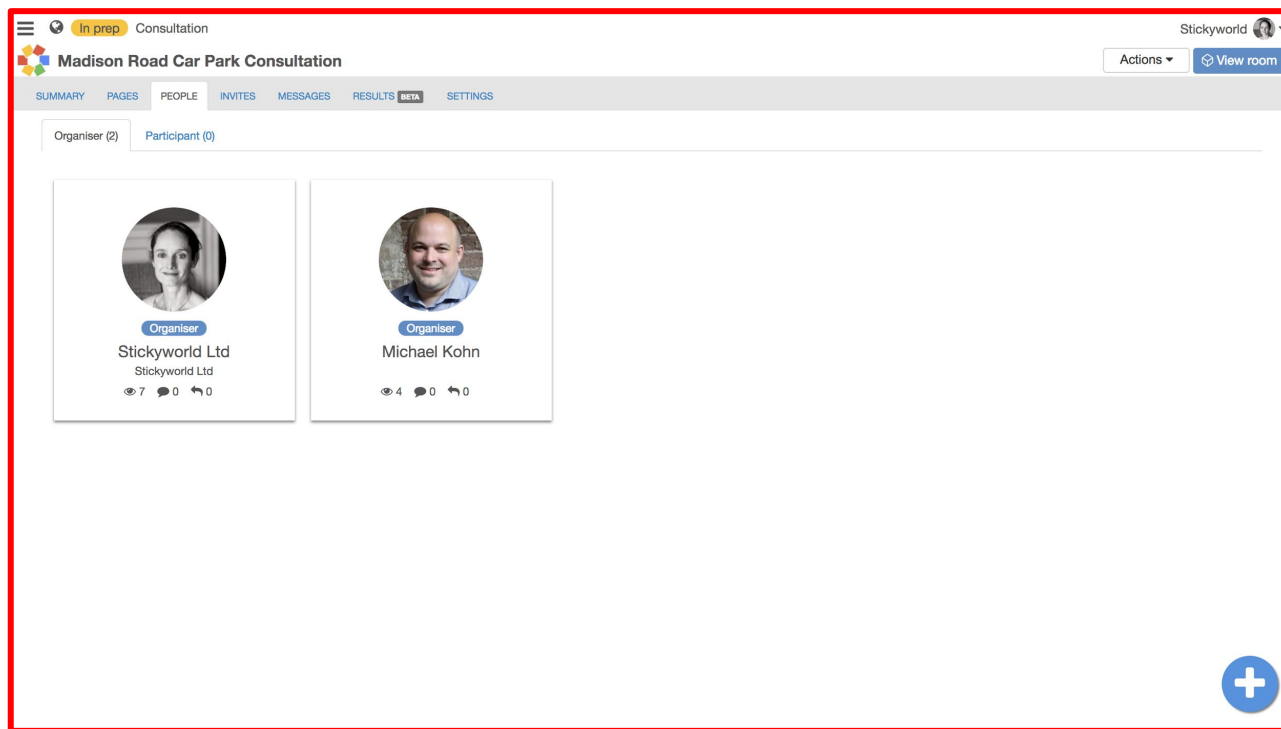Customise the message you want to add to your invitation.
Then click the blue Send invite button.

Invite organisers ⊘

Add email

✕ michael@stickyworld.com

Invite from a list

Contact list

Add a message

Please help me organise the Madison Road Car Pa...
Thanks.

Add a message

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

Send Invite

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Step 5. Check your People page

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.

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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'.

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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

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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

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Get in touch with your questions:

success@stickyworld.com

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