Content-loading your first Bulletin Board

Prepared for:
First time users of VisionsLive Bulletin Boards

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If you have any questions about your bulletin board that aren't covered in this guide, please get in touch with the team via support@visionslive.com.

Creating your First Bulletin Board

This is a guide to setting up your first bulletin board including:

- Creating a new project and a new board
- Adding respondents
- Adding questions and stimulus to your board

Getting Started

Log in to your account at https://client.visionslive.com. You should have received an email regarding setting up your login details; if you have not, contact support@visionslive.com.

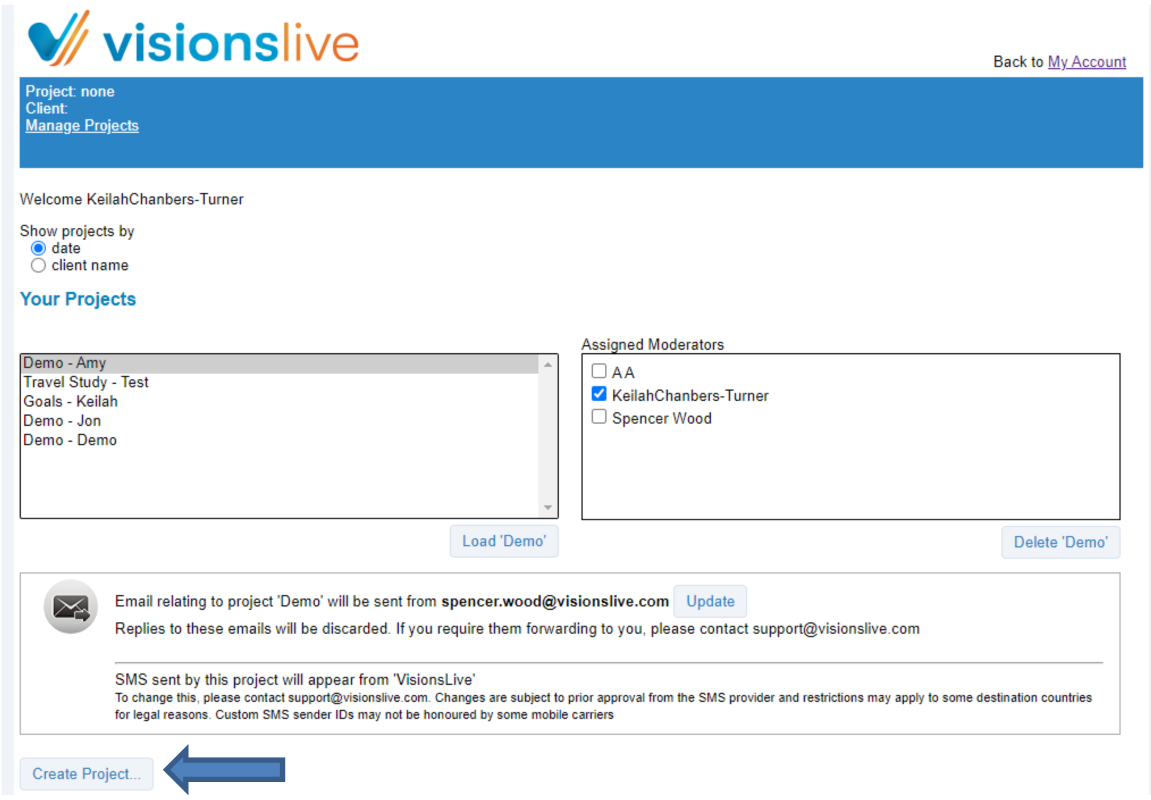
If you have forgotten your password, click on the “Forgotten your password?” link to be sent a new one.

Once logged in, click on ‘View Modules’ under the ‘Moderator Options’ header, followed by selecting ‘Bulletin Boards Manager 2.3’. This will give you access to the Bulletin Boards account dashboard.

Creating a New Project

The first page you see is the company dashboard, which shows all projects on the account. On this page, you can load projects, or create new ones.

To create a new project, select the ‘Create Project’ button on the bottom-left of the screen. This will then ask you to type the Project Name and Client Name. You can change the language of specific boards within each project, so you can leave the language as English. You can then select ‘Create Project’ again to confirm and save your new project.



Once you have created your project, it will be added to the 'Your Projects' section above. You can then select it, and then tick the names of the moderators you would like assigned to it in the box to the right-hand side.

Accessing a Project

The 'Your Projects' section by default is ordered by date and has the most recent project chronologically at the top. You can also change this to order by 'Client Name' by selecting the corresponding option, which orders the projects alphabetically by client name.

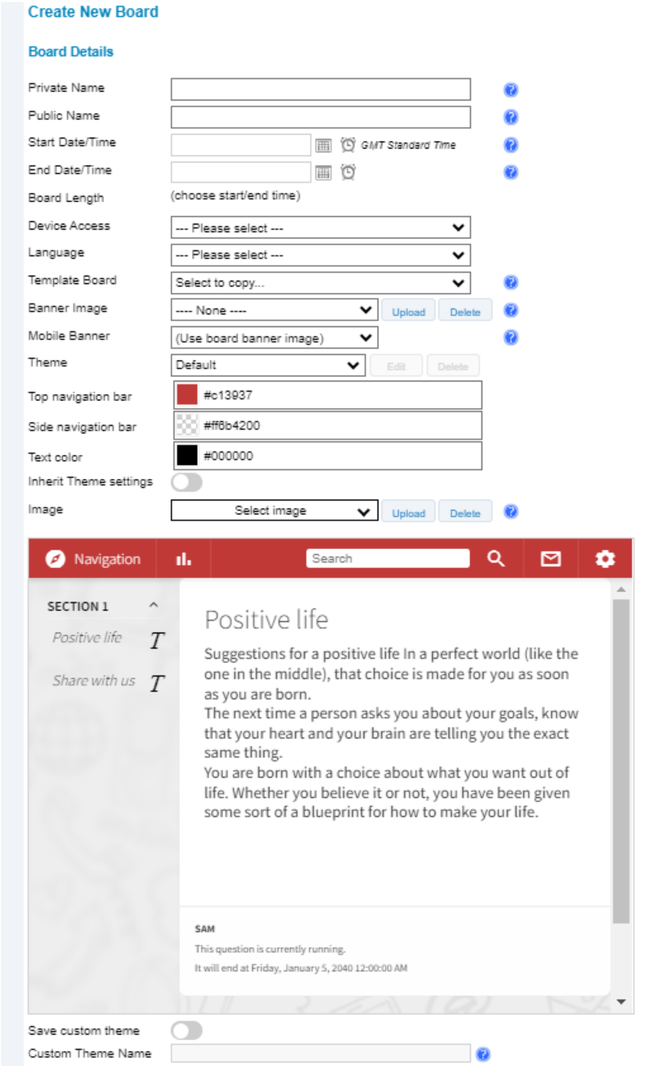
To access a project, click the project you want to open and then press the 'Load' button below the project box.

If nothing happens, please ensure you are assigned to the project by clicking your name in the 'Assigned Moderators' box, and then try again.

Once you load the project, it will bring you to the project's dashboard, showing all boards within that project if there are any. The project name and client name will also be confirmed in the top left corner.

Creating a New Board

To create a new board within a project, select the 'Create Board' button on the top toolbar. This will bring you to the setup wizard. Follow the wizard, using the '?' icons for additional information.



Steps in the Create Board Wizard:

1. **Board Details** Enter the Private and Public board names, start date and times, device access, language, and banner (logo) images, and choose a theme (background image and colours). You can also copy across templates from any existing boards within the same project under ‘Template Board’.
2. **Themes** You can add a default theme to your board, and you can preview the themes by clicking on the dropdown list. You can also customise your own theme and save this as a template which can be used for any new boards you set up within the same project.

Notes:

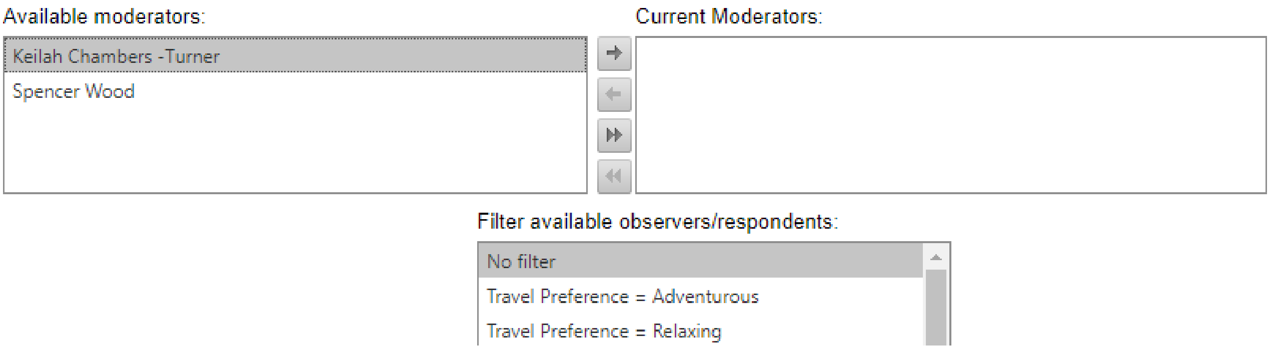
- Usage time is charged in 24h blocks, so it is recommended to end the board at the time it opens, where appropriate, to get the most out of it.
- Assigned Moderators can access the board at any time – Respondents can only access during the times/dates selecting at this stage.
- If you set browser access to Browser only, respondents can still access via mobile by opening the link in their mobile browser.
- Language selection changes user-interface elements (e.g., buttons), however does not translate any content put in by moderator (e.g., question text)

3. Select Participants

This section allows you to add people to the board. If you have not added anyone to the project yet, you can add only moderators and add others at a later stage

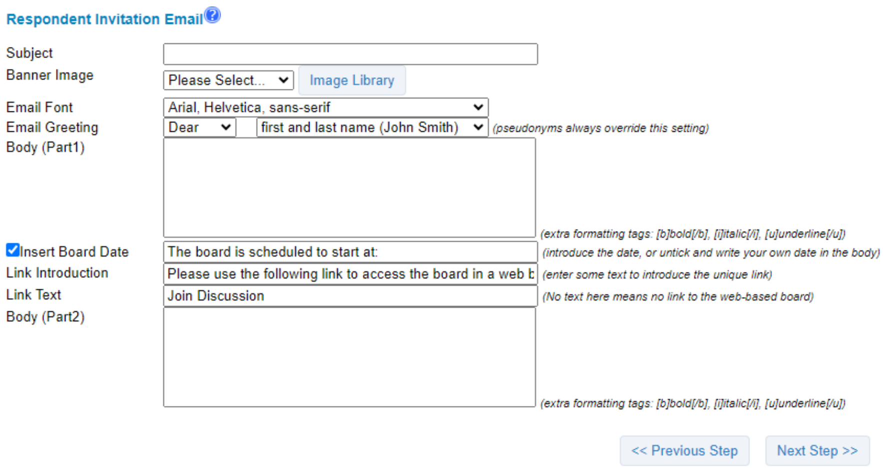
Participants on the left are ‘available’ to be added to the project by selecting them and clicking the single right-facing arrow to move them to the ‘current’ section. Everyone in a section can be moved by clicking the double arrow icon.

If you have filters, you can select these to only show participants with those profile fields in the ’available’ section to ensure that only those participants are selected when you move them across to the ‘current’ section.



4. Invitation Emails

When respondents and/or observers are added to the board, you are brought to the Invitation Email page. Emails are sent on the final confirmation of the wizard setup, so if you don’t want invitations sent yet, you can go back and deselect the participants.



This page gives you options to customize your invitations per your requirements, including multiple free-text text boxes. There are tips in brackets on the right to guide you on what should be in each section.

Certain aspects are automatically added, such as respondent name, board start date and time (unless this is unticked), and everyone’s unique link (represented by whatever is input in the ‘Link Text’ section)

You will have the option to create separate invitations for respondents and observers.

5. **Confirmation**

On the final confirmation page, you can check your information is correct. Clicking ‘Finish’ will create the Board and send any invitations out to participants who have been added.

Most details can be changed at any point after the board has been setup, however the exception is that once the board is live, the start date cannot be adjusted. To edit these, select the ‘Edit Board Details’ button on the project’s dashboard.

Adding Content to a Board

Once a board has been created, return to the dashboard by clicking ‘Boards’ on the top toolbar.

To add content, simply select the “Edit Board Content” button within the moderator tools column.


Question Test Board - 17583

Hide Details

Name	Role	Messaging Activity	Last Seen	Last Message	Send Message
KeilahChanbers-Turner	Moderator	no posts yet	28 days ago		
Superman	Observer	no posts yet	never	never	
Oracle (Barbara Gordon)	Respondent	no posts yet	never	never	
Batman (Bruce Wayne)	Respondent	no posts yet	never	never	
Commissioner (Jim Gordon)	Respondent	no posts yet	never	never	
Princess Peach (Peach Toadstool)	Respondent	no posts yet	never	never	
Catwoman (Selena Kyle)	Respondent	no posts yet	never	never	

Start: 12 Jun 2023 13:28
End: 04 Feb 2024 23:30
Duration: 237.46 days (238 days usage)
Language: English

View Discussion
Edit Board Details
Edit Board Content
Manage Board Participants

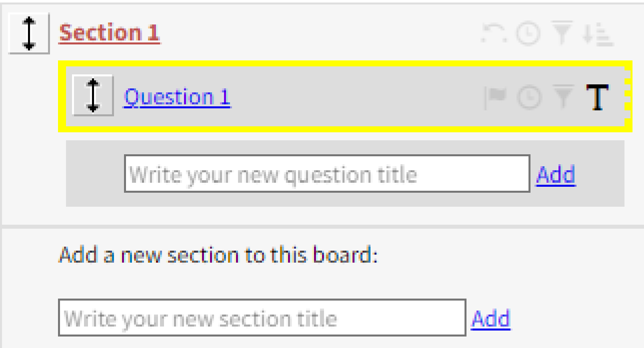
Adding Sections and Questions

The initial blank bulletin board simply shows a single text box and an “add” button. This is for you to create the first section. Each Section will set the rules that will apply to the questions that are created inside it. Sections are the ‘wrapping’ for the questions, and can be used to define topics or days, and can have their own default rules and publish dates.

To create a section, type the name for the section in the text box and hit the “add” button.

The section details are then displayed on the right-hand side, to be filled in as required (see definitions ➢ below). Whenever you make any changes, ensure you click the Save Section button before moving on.

You will then have the option to add questions to the section or create new sections.



To add a new question within a section, type the title of the question inside the text box within it, and then click ‘Add.’ The title of the question is used for signposting and should be kept short. When a question has been added, you can use the Body textbox to enter the actual question detail.

Next, confirm the details of the question, including various question and answer types and content as required, then hit the Save Question button.

You can add as many Sections and Questions as you like, and can reorder them, if necessary, by dragging the arrows to the left of the titles. You can edit section details or titles at any point by clicking them.

Board Content and Settings Definitions

When adding sections or questions, you have the option to enable and dictate different settings. When you choose these for sections, they become the default settings for any questions in that section, however most settings can be changed for each individual question. Some of these options may be under Advanced Features.

Respondent Journey

- **Sequence –** Each question in the section must be answered in order before the Respondent can move on to the next available question. *[section setting only]*
- **Dependence** – This section is not available until the section it depends on has been fully answered. *[section setting only]*
- **Checkpoint –** This assigns a profile field to any respondent that answers that question, which can be used as a filter for later questions (e.g. creating a dependence for a few questions rather than the whole section). *[question setting only]*

Section/Question Visibility

- **Start Date** - The date/time when this section/question becomes visible, and available to be answered.
- **End Date** - The date/time when this section/question will close and be hidden to respondents.
- **Respondent Filter** – When selected, only respondents who have a certain profile field assigned to them can see and answer that section/question.

Appearance

- **Private Title** – An alternative title for the section/question that can only be seen by moderators. Useful for signposting any filters used.
- **Header Text –** Adds text that is displayed at the top of every question within the section. Can be used for prompts or task instructions. *[section setting only]*

Respondent Interaction

- **Respondents see other answers** –
    - After they answer - Respondents can see other respondents' answers only once they have replied to the question themselves.
    - Before they answer - Respondents can see other respondents' answers at any time.
    - Never - Respondents can never see other Respondent's answers.
- **Uploads –** Selecting/deselecting these options dictates whether respondents can add additional files with their answers. *[question setting only]*

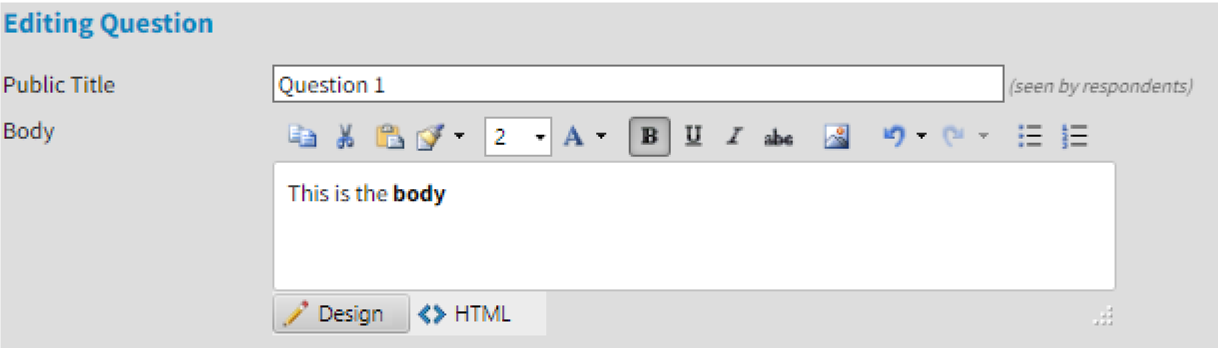
Board Question and Answer Types

Question Types

There are two types of Question Types used within the boards: Text Only, and Text + Drawn Image:

- **Text Only** – This is the standard question text box, which allows you to add your question details. You can use the formatting tools to edit the size and colours, and even use the HTML tools to customize it further if you are confident to do so.

  You can add images directly to the text with image icon or add one as an attachment with the 'Attach File' button below.



- **Text + Drawn Image** – This gives you the text box and all additional features as above, as well as a whiteboard space for respondents to **view only** i.e. if you use the drawn image for the <u>question type</u>, respondents cannot use this or interact with it. If you want to an interactive whiteboard, you will need to select it as an <u>answer type</u>.

Answer Types

There are six different answer types to choose from for each question:

- **Information** – This type doesn't give the respondent an answer space and requires no action from them to continue. It can be used for introductory text and task instructions.
- **Text** – Respondents can write open ended text answers, with the ability to allow multiple submissions and attach media files if enabled if selected.
- **Heatmap** – Present an image to respondents, allowing them to add positive, negative, or neutral comments to it directly. This requires uploading an image by pressing the 'select' button.
- **Single Answer Polls/ Multi Answer Polls** – These give the respondent multiple options and allow them to select either one/multiple of them to submit. You can enable the option to add a text answer alongside their poll choices.

  Poll answers can also be used to assign profile fields to respondents by selecting 'Link to a profile field', selecting a pre-added profile field category (new ones can be added under Tools > Profile Fields on the top toolbar), and choosing a specific profile field option to be associated with each poll answer. This only works with Predefined Options.

- **Whiteboard** – This is an interactive space allowing respondents to use various tools to mark up images, create mood boards, engage in drag and drop exercises etc. When selecting this answer type, you can give respondents an empty whiteboard to start with, or add elements for them to interact with, depending on what is appropriate for your activity. E.g. You can set up arrows and images for a scale and sort exercise.

There are multiple tools you can use on the whiteboard, as well as giving the respondents the option to use:

Selector – to move content around on the aboard, adjust images sizing etc.

Pencil – to draw or mark up content.

Line – useful for creating scales for drag and drop exercises. Ability to add arrows on either side of the line.

Image upload – for uploading images directly onto the whiteboard. Once an image is added to the whiteboard, use the icon to lock images into place.

Images library – create a 'bank' of 'public' images that can be used by respondents. Can also be used by moderator to add images to the whiteboard.

Text – add text to the whiteboard, change the sizing etc.

Tick – useful for indicating 'likes' on an image being presented, for 'liking' or 'agreeing' with statements on a grid.

Cross – useful for indicating 'dislikes' on an image being presented, for 'disliking' or 'disagreeing' with statements on a grid.

Highlighter – allow respodnents to highlight text on an image, indicating interesting statements, sentences, words etc.

Square – draw a square or rectangle, to create shapes or tables (with the use of the line tool as well).

Circle – draw a circle to create shapes, mind/word map etc.

Note: anything you add to the whiteboard that is not to be moved by a respondent must be locked into place by using the icon.

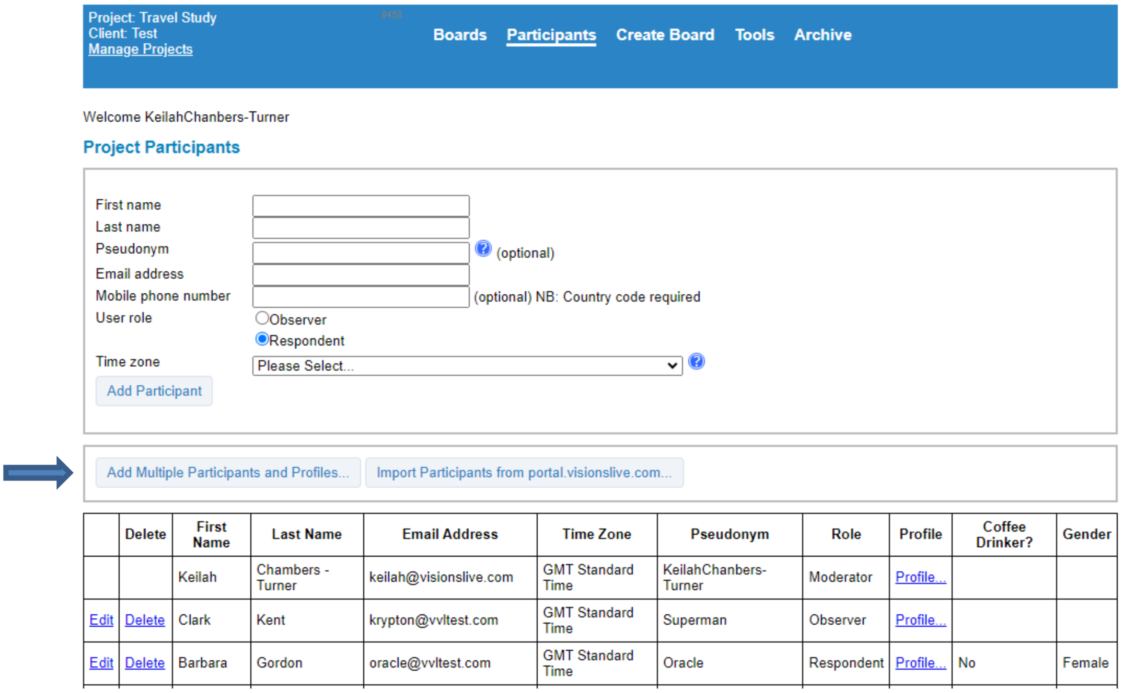
When make any changes to a question, including changing any settings or adding text to the question body, ensure you press 'Save Question' before moving on.

Adding Participants

Adding Participants to a Project

Before you can add participants to a board, you need to first add them to the project.

To do this, first click on the 'Participants' button on the top toolbar. This will bring you to the 'Project Participants' page. This page gives you the option to either add individual participants or upload multiple at once.



To add participants individually:

Simply fill out the form on the Participants page, ensuring all non-optional fields are filled and that you select the correct user role and time zone. Then, select ‘add participant’ and this will add them to the project and show them in the table below.

To add participants in bulk:

1. Click on the ‘Add Multiple Participants and Profiles’ button (highlighted above). This will open a Wizard to guide you through the steps.

   When asked about ‘User Default Values’, please ensure that when you add participants in bulk, they are all the same role and time zone as each other. If you have participants of different groups, these will need to be uploaded separately.

   If you are reuploading participants that have already been added before but need information changed (e.g. adding new profile fields, or changing time zones), you can use the ‘Existing User Handling’ section to decide which information the system matches new entries to.

2. One the next step, you will need a prepared Excel sheet with your participant information. You will need headers with the following: First name, Last name, Email address. This is the minimum information the platform requires to add a participant.

   You can include Mobile Numbers (with country codes), Pseudonyms which will overwrite participant first name and last name fields in public areas of the board, or any additional ‘profile field’ data such as age, gender, user type etc. These are optional, but mobile numbers are mandatory if you will be using SMS messaging through the platform.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Mobile Number	Pseudonym	Coffee Drinker?	Gender
2	John	Smith	john.smith@vvltest.com	+447711223344	Jonboy	No	Male
3	Joanna	Smyth	joanna.smyth@vvltest.com	+447799887766	Jojo21	Yes	Female
4							
5	Key:						
6	Compulsary						
7	Optional						
8	Custom: Profile Fields						

You then need to copy the data all the columns of information you want to be added to the platform, including the headers. Then, paste the data into the text box in the wizard. It should look like below:

Add Participants with Profile Fields

Please copy your user data out of Microsoft Excel and paste it below

Your data must have a header row
*Your headers must, as a minimum, contain: **First Name**, **Last Name**, **Email Address***
*You can have a column for **Time Zone**, but it must follow the time zone rules*
*If you want to send text messages, one of your columns must be **Mobile Number**. It must include the country code (examples: 0044789123456, +44-789-123456, 44 789 123456)*
Users that already exist will be updated according to the options chosen on the previous page

```
First Name      Last Name       Email   Mobile Number   Pseudonym       Coffee Drinker?
Gender
John    Smith   john.smith@vvltest.com  +447711223344   Jonboy  No      Male
Joanna  Smyth   joanna.smyth@vvltest.com        +447799887766   Jojo21  Yes     Female
```

Previous Next

3. When you select ‘next’, it will bring you to a page to confirm the categories of data you are uploading. For basic information, the ‘Your Sheet Has…’ column should match the category under ‘Store This Data In’. If the latter column says ‘—Create New—’, it will create a new profile field based on the column header that was imported, with a text box to change the name if needed. It is recommended to change the dropdown from ‘Text’ to ‘Predefined values’ and leave it as ‘Moderators Only’ if you would like profile information to be private.

Add Participants with Profile Fields

Choose which user profile fields to store your data in, or make new fields if none are suitable

Your Sheet Has..	Store This Data In..	(Field Definition)		
First Name	First Name		Predefined values	Moderators Only
Last Name	Last Name		Predefined values	Moderators Only
Email	Email Address		Predefined values	Moderators Only
Mobile Number	Mobile Number		Predefined values	Moderators Only
Pseudonym	Pseudonym		Predefined values	Moderators Only
Group	--Create New--	Group	Predefined values	Moderators Only

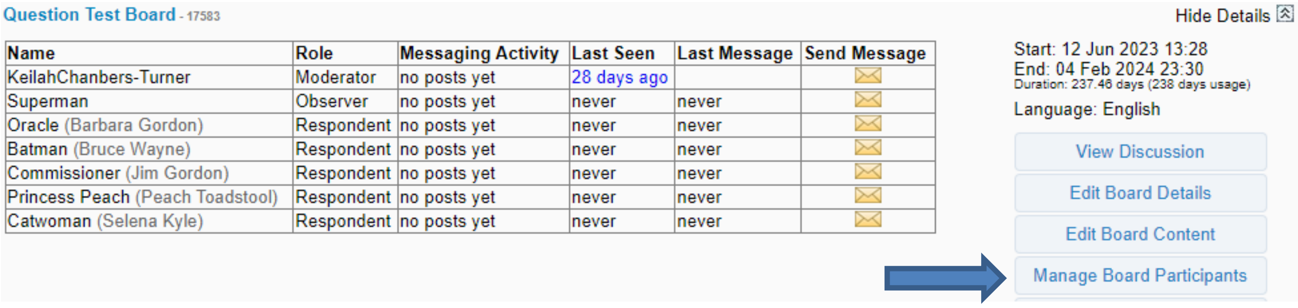
Previous Finish

When you’re happy, click ‘Finish’, and these respondents will be added to the project.

Adding Participants to a Board

Once a project has participants added, you need to add them directly to a board for them to be able to interact with it.

If you have added your participants before creating the board, you can add them on the 'select participants' page when it is first set up (pg.5). If you are adding them after the board is created, return to your board dashboard, and select 'Manage Board Participants' under the moderator tools.



Name	Role	Messaging Activity	Last Seen	Last Message	Send Message
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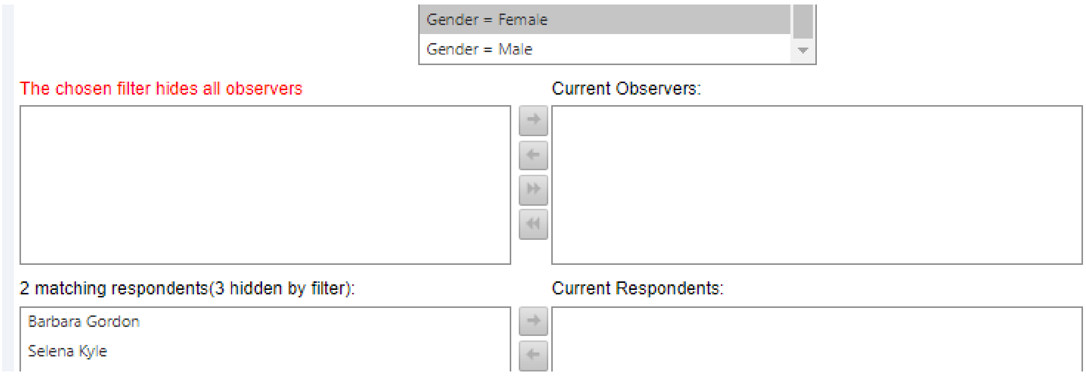
Commissioner (Jim Gordon)	Respondent	no posts yet	never	never	
Princess Peach (Peach Toadstool)	Respondent	no posts yet	never	never	
Catwoman (Selena Kyle)	Respondent	no posts yet	never	never	

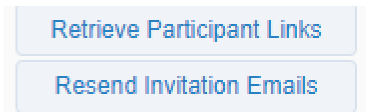
This will bring you to a page to add or remove participants from the board.

Participants on the left are 'available' to be added to the project by selecting them and clicking the single right-facing arrow to move them to the 'current' section. Everyone in a section can be moved by clicking the double arrow icon.

If you have filters, you can select these to only show participants with those profile fields in the 'available' section to ensure that only those participants are selected when you move them across to the 'current' section. This is useful if you have multiple boards in a project, each with different participants.



Whenever you add someone new, and click 'next step', it will prompt you to send an invitation email to send them a link to the board.



You can resend the invitation emails again at any point, by returning to the board dashboard and selecting 'Resend Invitation Emails'.

In addition, you can select 'Retrieve Participant Links' instead to have access to every participant's joining links, which can be copied and pasted to send to them directly outside of the platform. This can be useful if you used dummy emails for the respondents, or if someone has said they haven't received their link as expected.