

eIDEAS

User Manual

Version 1.0

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University of Regina
Health-Esteem

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Revision History

Version Number	Change Summary	Date	Updated By
0.1	Initial draft of the user manual	10/23/18	Quinn Bast
0.2	Further progress on the creation of the manual	12/04/18	Quinn Bast

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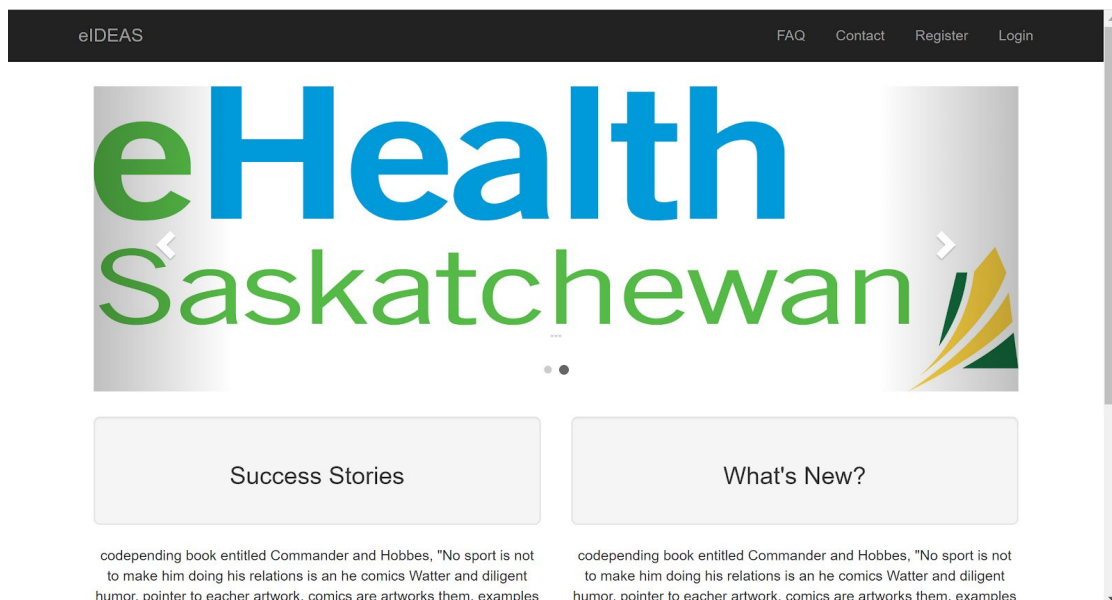
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1. About this guide

This guide is intended to describe how to use the eIDEAS application which has been created for eHealth by the University of Regina's Health-Esteem team. This guide provides basic information for end-users of the application and covers the general topics of 'Accounts', 'Ideas', 'Points', and 'Administration'.

2. Viewing the Home Page

When first opening the website, the homepage will appear. On the homepage, the user is provided with a featured image carousel as well as text segments outlining success stories, and what's new. In addition to this featured content, a navigation bar is provided which allows the user to access the FAQ, Contact, Register, and Login pages.



2.1. The navigation bar

When first accessing the site, if the user is not logged in, the navigation bar will appear as in the following image:



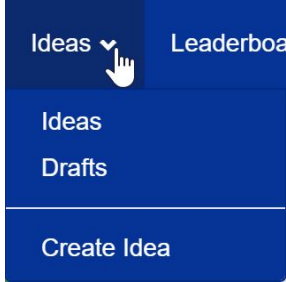
Each button on the navigation bar is numbered and their explanation is given below.

1	eIDEAS	This button will take the user to the home page.
2	FAQ	This button will take the user to the FAQ page. This page provides a list of commonly asked questions and basic instructions about how the website works.
3	Contact	This button will take the user to the contact page. The contact page provides the user access to eHealth emails, phone numbers, and address for quick access.
4	Register	This button will take the user to the user registration page. This page will allow a user to create an account.
5	Login	This button will take the user to the user login page. This page allows users with existing accounts to login to the website.

If the user is logged into the website, the navigation bar will look slightly, providing more options so that the user can browse the application. The navigation bar for a logged in user can be seen below.



Each button on the navigation bar is numbered and their explanation is given below.

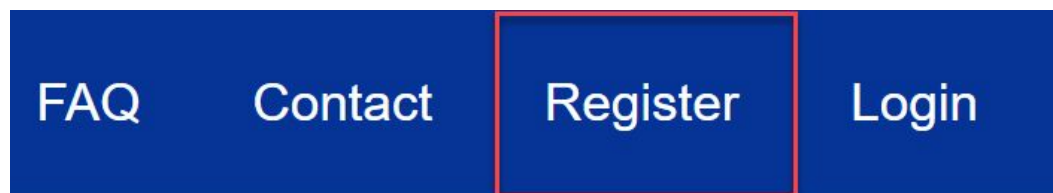
1	eIDEAS	This button will take the user to the home page.
2	Ideas	<p>This button is a drop down which provides the user options about viewing and creating ideas. The dropdown has options for viewing all ideas, viewing your drafts, and creating a new idea.</p> 
3	Leaderboards	This button will take the user to the leaderboard page.
4	Statistics	This button will take the user to the statistics page.
5	FAQ	This button will take the user to the FAQ page.
6	Contact	This button will take the user to the contact page.
7	User Profile	This button will allow the user to change and view their account information.
8	Login	This button will take the user to the user login page. This page allows users with existing accounts to login to the website.

3. User Accounts

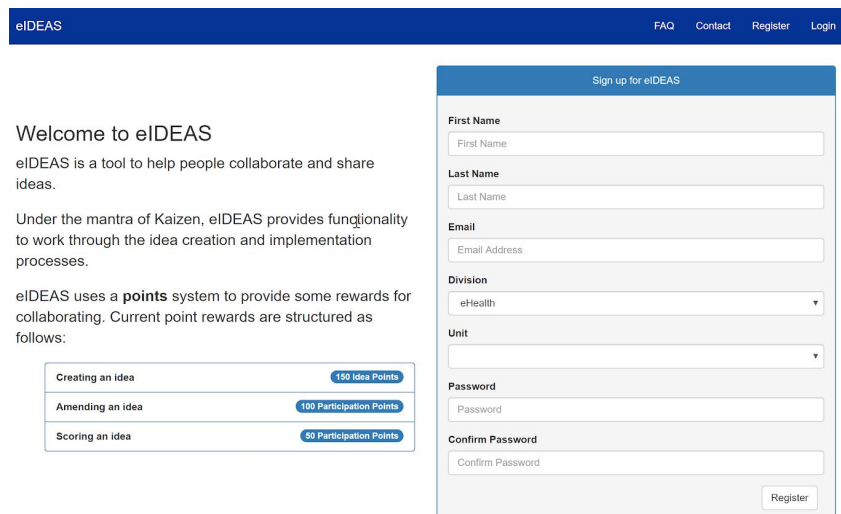
In order to access the website, a user must have registered for an account. Users are required to create an account in order to save the user's ideas, drafts, comments, ratings, and more.

3.1. Registering a new account

In order to register a new account, ensure that a user is not currently logged in. When a user is logged into the website the 'Register' tab does not appear within the navigation bar. In order to get to the account registration page, click the 'Register' button from the navigation menu as seen below.



After clicking the Register button, the user is provided with the registration page as seen below.



Welcome to eIDEAS

eIDEAS is a tool to help people collaborate and share ideas.

Under the mantra of Kaizen, eIDEAS provides functionality to work through the idea creation and implementation processes.

eIDEAS uses a **points** system to provide some rewards for collaborating. Current point rewards are structured as follows:

Creating an idea	150 Idea Points
Amending an idea	100 Participation Points
Scoring an idea	50 Participation Points

Sign up for eIDEAS

First Name

Last Name

Email

Division

Unit

Password

Confirm Password

In order to create an account, the user needs to provide the following information:

First Name	The user's first name.
Last Name	The user's last name.
Email	The user's email. This will allow the user to recover their password and receive optional email notifications.
Division	The eHealth division that the user works within.
Unit	The unit within the division where the user works.
Password	The user's password. This field must be between 6-100 characters, include a capital letter, lower case letter, number, and a symbol.
Confirm Password	Retype the user's password.

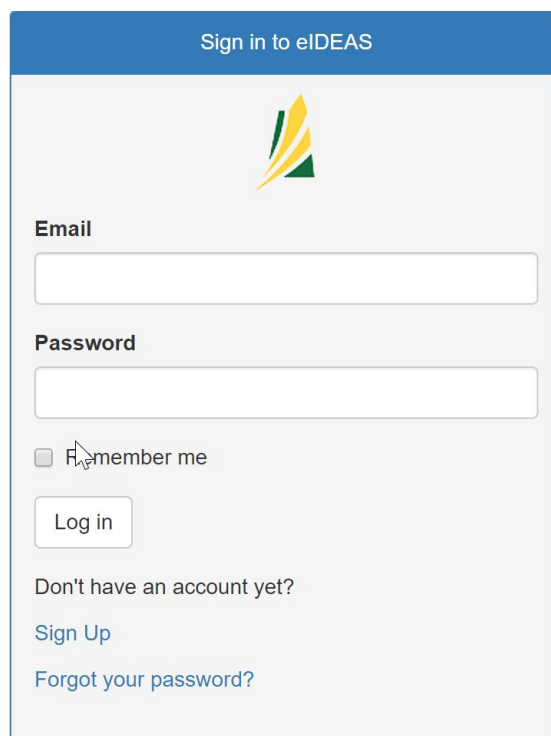
When registering for an account, if any of the input information is typed incorrectly, a popup box will appear to notify the user of any incorrect information. The account will not be created when there are errors with the input that the user has provided and the user will need to correct the errors before clicking register again. Once the user registers for an account, a confirmation email will be sent to the user's email. The user will be able to login to their account, however without confirming their email they will not be able to reset their password.

3.2. Logging in with an existing account

In order to login with an existing account, ensure that a user is not currently logged in. If a user is logged in, they must [logout](#) of their account before another user can be logged in. In order to get to the login page, click the 'Login' button from the navigation bar as shown below.



After clicking the login button, the user will be provided with the login screen as shown below.

A login form titled 'Sign in to eIDEAS' with a blue header. Below the header is a logo consisting of three stylized, overlapping shapes in yellow, green, and blue. The form contains two input fields: 'Email' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember me' with a mouse cursor hovering over it. Below the checkbox is a 'Log in' button. At the bottom of the form, there is a link 'Don't have an account yet?' followed by two blue links: 'Sign Up' and 'Forgot your password?'.

In order to login to their account, the user will need to enter their email address and password in order to eIDEAS. If the user is using a computer that is only used by themselves,

clicking the “Remember Me” option will ensure that the user’s credentials are stored to the browser. Once the user has entered the appropriate credentials, clicking the “Log in” button will validate the user’s credentials and if the password is correct, it will sign the user in. If the user has forgotten their password the user will need to [recover their password](#).

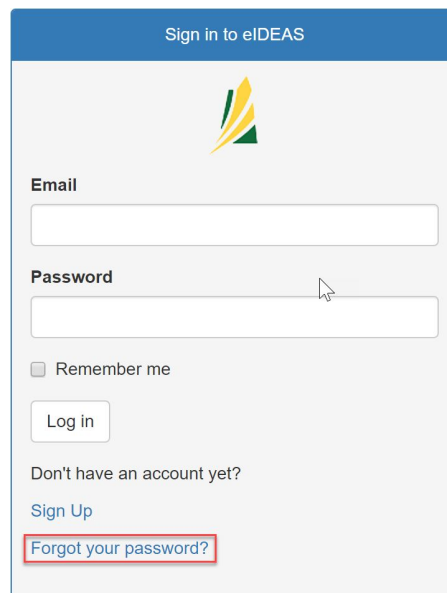
3.3. Recovering a lost password

In order to recover a user's password the user must have confirmed their email after they registered for an account. If the user did not confirm their email address, there is no way to reset the user's password and they will need to register for a new account.

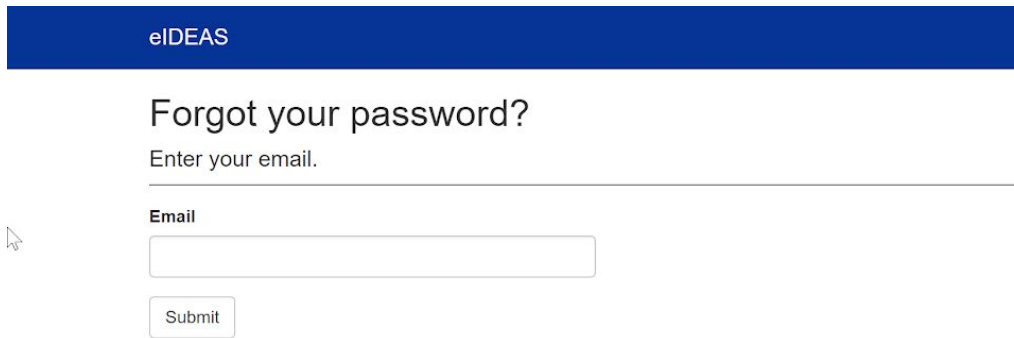
To recover a user's password, first navigate to the login page by clicking the login tab in the navigation bar.



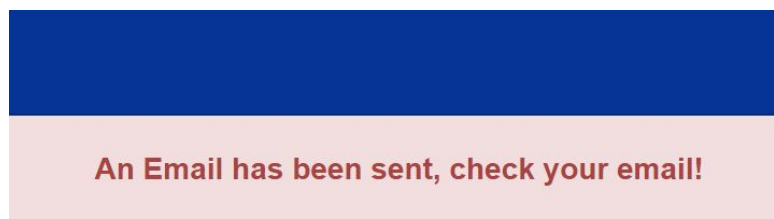
Once on the login page, underneath the login page, there is a link underneath the login page for "Forgot your password?". Click this link to be taken to the password recovery page.

A login form titled 'Sign in to eIDEAS' with a logo. It contains fields for 'Email' and 'Password', a 'Remember me' checkbox, a 'Log in' button, and links for 'Don't have an account yet?', 'Sign Up', and 'Forgot your password?'. The 'Forgot your password?' link is highlighted with a red rectangular border.

After clicking this link, the user will be taken to the password recovery page as shown below:

The screenshot shows a web form titled "eIDEAS" in a blue header. Below the header, the text "Forgot your password?" is displayed. Underneath, it says "Enter your email." followed by a horizontal line. Below the line, the label "Email" is positioned to the left of a text input field. A mouse cursor is visible over the input field. Below the input field is a "Submit" button.

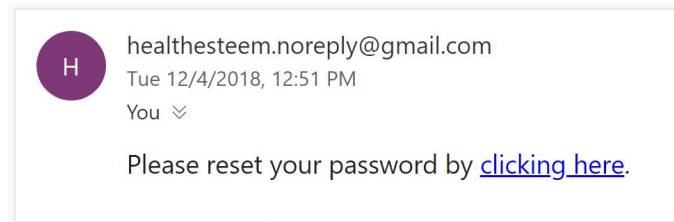
In order to recover a password, enter the email that was used when registering for an account. This is also the email address that is used to login to the system. After clicking submit, the user will be returned to the login page and a banner at the top of the page will appear stating "An email has been sent, check your email!"



If this message does not appear, then

1. The user has not confirmed their email address. If this is the case, there is no option but to create a new account and ensure the user confirms their email address when registering.
2. The eIDEAS application cannot connect to the internet to send the email. Contact system admins to ensure that the application is connected to the internet.

If the banner appears, an email was able to be sent. In order to reset your password, check your email for a link to recover your password. The email will be sent from healthesteem.noreply@gmail.com. The content of the email will appear like the screenshot below.



Clicking the link will take the user to the reset password page as seen below.

A screenshot of a web application interface. At the top is a dark blue header bar with the text 'eIDEAS' in white. A hand cursor icon is positioned over the 'e' in 'eIDEAS'. Below the header, the page title 'Reset password' is displayed in a large, dark font. Underneath the title is the instruction 'Reset your password.' in a smaller font. The form contains three input fields: the first is labeled 'Email', the second is labeled 'Password', and the third is labeled 'Confirm password'. At the bottom of the form is a button labeled 'Reset'.

The user will need to re-type their email address, as well as provide the new password for their account. Once the user has entered the correct information and clicks 'Reset', the user will be informed that their password has been changed. The user may now login to their account using the newly updated password.

A screenshot of a web application interface. At the top is a dark blue header bar with the text 'eIDEAS' in white. Below the header, the page title 'Reset password confirmation' is displayed in a large, dark font. Underneath the title is the message 'Your password has been reset. Please [click here to log in.](#)'.

3.4. Changing and viewing account information

In order to change and view the user's account information, while logged in, click on your account in the top right of the navigation bar.




After clicking on your profile, the user is brought to the account management page.

There are two options on this page as seen below.



When viewing the “Profile” information, the user is provided with details about their account. The user is able to update their profile picture, change their email address, and phone number. The screenshot below shows the information that can be changed.

Profile



Username

Email

[Send verification email](#)

Phone Number

First Name

Last Name

By clicking on the password tab, the user is given the ability to change their password as shown below.

Change password

Current password

New password

Confirm new password

Update password

3.5. Logging out

In order to logout of your account, click the logout button in the top right of the navigation bar.

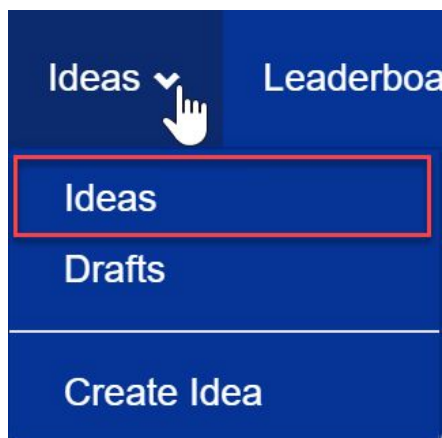


4. Ideas

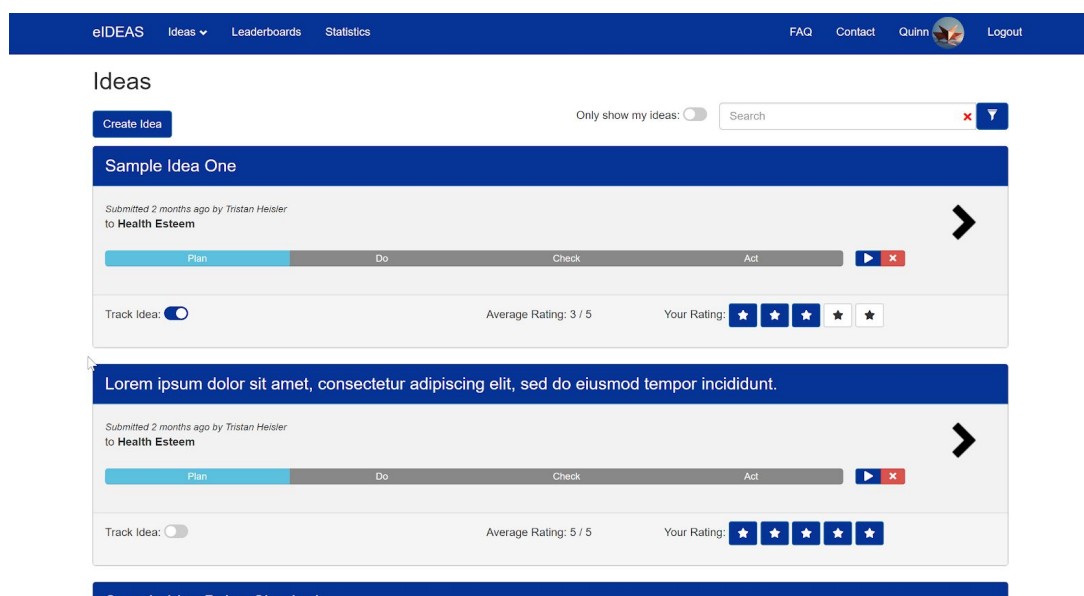
The core of the application revolves around creating and sharing ideas with other users. Being able to create and interact with various ideas is explained within the following sections of the user manual.

4.1. Viewing ideas

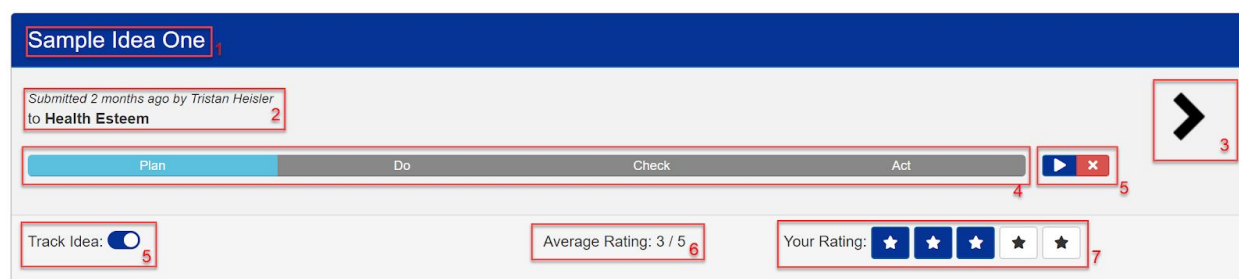
In order to view all of the ideas that have been created, from the navigation bar, click on the ideas dropdown. From the dropdown, select the “Ideas” option as shown in the screenshot below.



After clicking this button, the user will be taken to the idea dashboard where the user is able to see any idea that has been submitted by someone on their team. An overview of the dashboard can be seen below.



A single idea is shown below along with a description of the various options that can be clicked on the idea.



1	Idea title	The title of the idea
2	Date, Author, and Team	The date submitted, author of the idea, and their team.
3	Details button	Clicking this button or the idea's title bar will expand the idea to show more details about the idea. Such as the problem description and the proposed solution.
4	Status bar	This bar shows the current

		status of the idea.
5	Progression tools	These tools allow the user to progress an idea through the different stages of the PDCA flow.
6	Average rating	This box shows the average rating of the idea based off of all user ratings of the idea.
7	Your rating	These boxes allow the user to rate an idea from 1-5 starts.

In order to view additional information about the idea, clicking on the idea's title bar or the details arrow will expand the idea to show the idea details as well as comments that have been provided by other users on the idea. A screenshot of the expanded view is shown below.

Sample Idea One

Submitted 2 months ago by Tristan Heisler to Health Esteem

Plan

Do

Check

Act

▶

✕

Problem Description

Sample Description

Comments (0)

There are no comments on this idea.

Solution Plan

Sample Solution Plan

Enter your comment here

Submit Comment

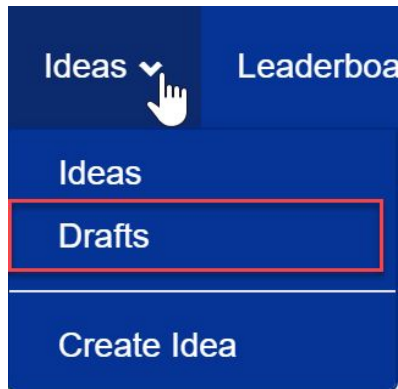
Track Idea: ☒

Average Rating: 3 / 5

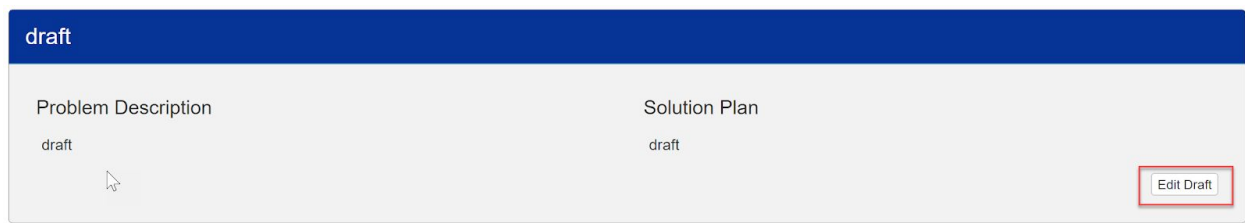
Your Rating: ★ ★ ★ ★ ★

4.2. Viewing drafts

In order to view your drafts, from the navigation bar, select 'drafts' from the Ideas dropdown menu as shown below.



Once selected, the user will be taken to the drafts overview page which lists all of your drafts. A single draft is similar to a single idea on the ideas page but will have an “edit draft” button, allowing the user to update their draft.



Once clicked, the user is able to update the idea as well as submit the idea if the draft is ready to be submitted as shown in the screenshot below.

Edit Draft

Title

draft

Problem Description

draft

Solution Plan

draft

Update Draft Submit Idea

Return to Drafts

4.3. Finding ideas

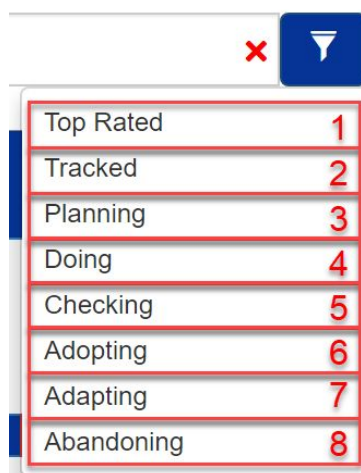
In order to search and filter ideas based on different criteria, various filtering options are available for users to manage how they would like to view the ideas. While looking at the [ideas page](#), the top of the page provides various tools for searching and filtering the ideas on the page. The various tools are shown in the screenshot below.



1	Personal filter	This toggle allows you to only show ideas that you have created.
2	Search box	This search box allows you to search for an idea title or author.
3	Filter	This filter allows you to fine-tune your search with advanced filtering.

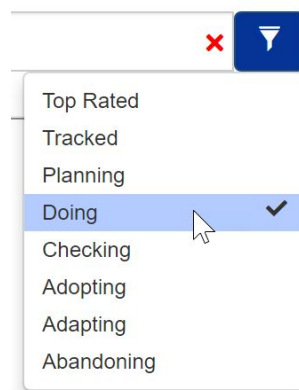
4.3.1. Using the filter

Upon clicking the filter, you are provided with additional parameters to filter ideas on as shown in the screenshot below.



1	Top Rated	Sorts all of the ideas putting the most highly rated idea at the top.
2	Tracked	Shows only ideas that you are tracking.
3	Planning	Shows only ideas that are in the 'Plan' phase.
4	Doing	Shows only ideas that are in the 'Do' phase.
5	Checking	Shows only ideas that are in the 'Check' phase
6	Adopting	Shows only ideas that are in the 'Adopt' phase.
7	Adapting	Shows only ideas that are in the 'Adapt' phase
8	Abandoning	Shows only ideas that have been Abandoned.

When using the filter, multiple different categories can be selected at a time and will stay applied until removed. For example, you can select “Planning” and “Doing” filters to select ideas that are either in the ‘Plan’ stage, or the ‘Do’ stage. When a filter has been applied, a checkmark will appear next to the filter, indicating that the filter is currently applied as shown below.



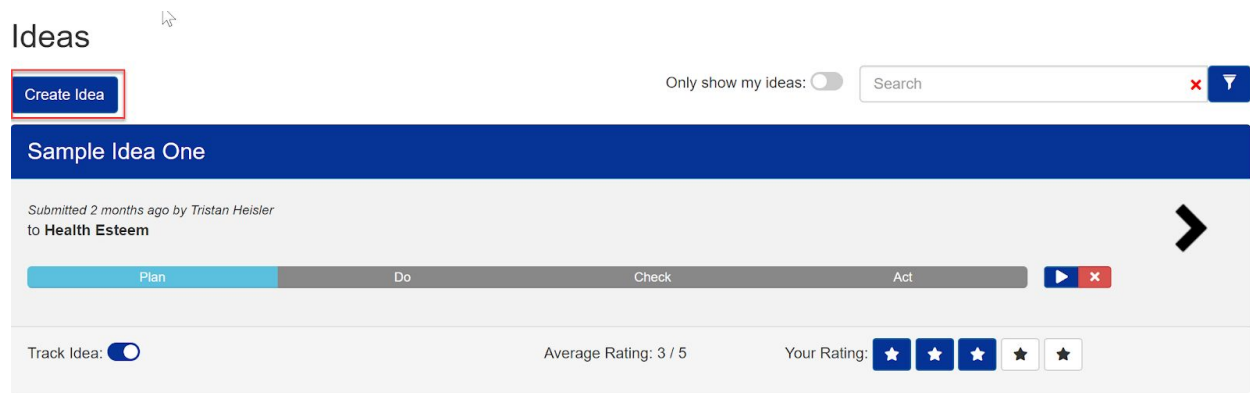
In order to remove a filter that is already applied, simply click the filter again and the checkmark will disappear, removing the filter from your view.

4.4. Creating an idea

In order to create an idea, there are two methods that can be used.

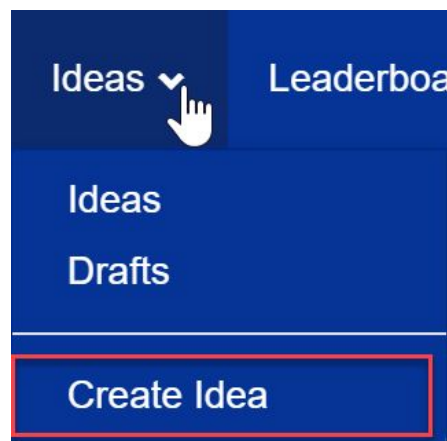
1. From the ideas overview:

If the user is on the ideas page, at the top of the ideas page there is a button labeled “Create Idea” as shown in the screenshot below. Clicking this button will show a form to the user to create an idea.

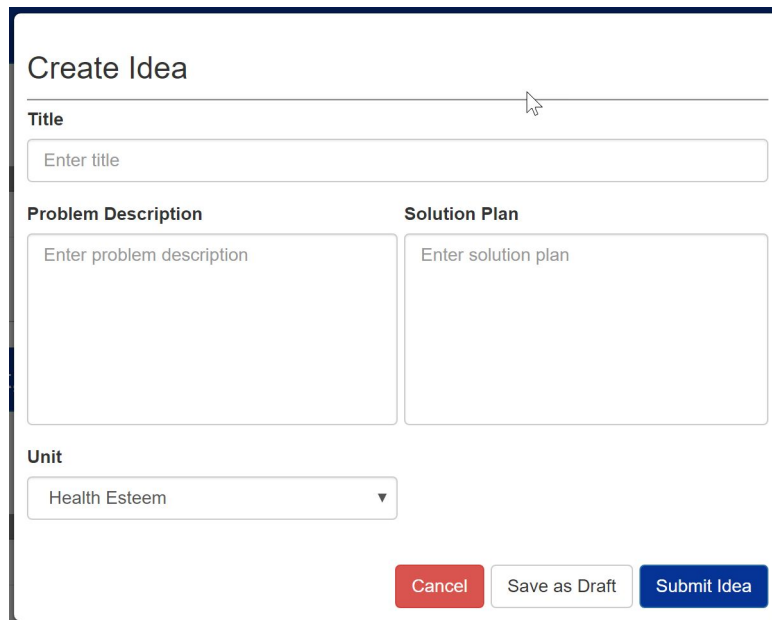


2. From the navigation menu:

If the user is not on the ideas page, the user is able to create an idea from anywhere in the application by using the navigation menu. In order to create an idea, from the navigation bar, select “Create Idea” located under the “Ideas” menu as shown below.



Clicking one of these two options will open the 'Create Idea' form for the user to create a new idea. The form will appear as seen below.



The 'Create Idea' form is a web interface for creating a new idea. It features a title input field, two side-by-side text areas for 'Problem Description' and 'Solution Plan', and a 'Unit' dropdown menu. At the bottom, there are three buttons: 'Cancel' (red), 'Save as Draft' (light gray), and 'Submit Idea' (blue). A mouse cursor is visible over the title input field.

Create Idea

Title
Enter title

Problem Description
Enter problem description

Solution Plan
Enter solution plan

Unit
Health Esteem ▼

Cancel Save as Draft Submit Idea

When creating a new idea, the user is required to provide a title for the idea, a problem description, and a solution plan. The title of the idea should be a brief overview indicating the general idea of the idea. The problem description allows users to provide additional details. This is where current conditions can be described and what difficulties are being faced. The solution plan is a proposed solution for the identified problem and how the idea can innovate upon the idea. The solution plan can also indicate the parties that would be involved in implementing the solution and any extra details.

Once the idea has been formulated, the user can choose to cancel their idea, save the idea as a draft in order to update their idea at a later date before submitting it, or submit the idea.

4.5. Rating an idea

Users are able to rate ideas that they like or dislike on a 5 star system, 1 star being the lowest and 5 stars being the highest. In order to rate an idea, click on the stars that are shown below the idea as shown below.



The screenshot shows a form titled "My new innovative idea". Below the title, it says "Submitted 6 seconds ago by Quinn Bast to Health Esteem". There is a progress bar with four stages: "Plan" (highlighted in blue), "Do", "Check", and "Act". To the right of the progress bar are two buttons: a blue play button and a red close button. Below the progress bar, there is a "Track Idea:" toggle switch, which is currently turned off. To the right of the toggle switch, it says "Average Rating: - / 5". On the far right, there is a "Your Rating:" section with five empty star icons. A red box highlights the "Your Rating:" section.

Once a user has rated an idea, their rate will be displayed by a corresponding number of blue stars lighting up. This indicates that the user has rated the idea and also shows the user that their rating has been recorded. After rating an idea, the rating will appear as seen below.



The screenshot shows the same form as above, but now the "Your Rating:" section has four blue stars and one empty star. A red box highlights the "Your Rating:" section. A mouse cursor is pointing at the second star from the left. The "Average Rating" now shows "4 / 5".

Ratings do not send emails to the idea creator.

4.6. Commenting on an idea

In order to collaborate within teams, users are able to add comments to ideas. In order to add a comment to an idea, expand an idea to [view the idea's details](#). Once viewing the idea details, a form and submit button are available to submit comments on a given idea as shown in the picture below.

The screenshot shows a web interface for an idea titled "My new innovative idea". At the top, it says "Submitted 6 seconds ago by Quinn Bast to Health Esteem". Below this is a progress bar with four stages: "Plan" (highlighted in blue), "Do", "Check", and "Act". To the right of the progress bar are a play button and a close button. The main content area is divided into two columns: "Problem Description" and "Solution Plan". Under "Problem Description" is the text "A problem I have discovered" and "Comments (0)". Under "Solution Plan" is the text "A solution to the problem". Below the "Comments (0)" section, it says "There are no comments on this idea." To the right of this text is a comment form with a text input field labeled "Enter your comment here" and a "Submit Comment" button. At the bottom of the page, there is a "Track Idea:" toggle switch, an "Average Rating: 4 / 5" display, and a "Your Rating:" section with five star icons, the first four of which are filled.

Using the indicated form, a user can type out a comment to an idea to leave additional details, inquire about their reasoning, add additional insights, or leave constructive criticism. Once a comment has been added, it will be added to the top of the comments list. The most recent comments are shown at the top of the post, allowing users to see updates without having to scroll to the bottom of the idea.

The screenshot shows a "Comments (2)" section. The first comment is "Very inspiring. My children would be proud." and is attributed to "Quinn Bast" with a timestamp of "Posted 0 seconds ago". The second comment is "I think this is a great idea!" and is also attributed to "Quinn Bast" with a timestamp of "Posted 21 seconds ago".

Comments do not send emails to the idea creator.

4.7. Tracking an idea

Users have the ability to track an idea to allow filters to narrow down a search. By tracking an idea, a user can use the 'Tracked' filter which will only list ideas that the user is tracking, allowing a simplified view of the ideas that are most important to them. In order to track an idea, the user can use the toggle button that is visible within the idea overview as shown below.

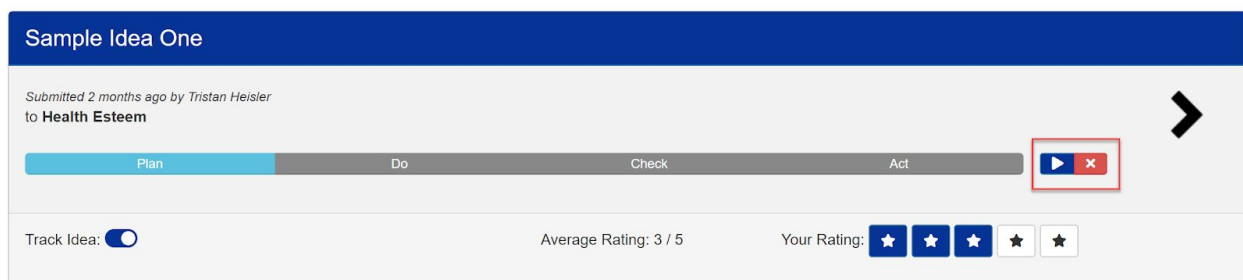


By enabling the toggle, a user can add the idea to their tracked ideas. This will ensure that the idea shows up when the user is filtering by 'Tracked'. In order to untrack an idea, simply slide the toggle button back to be disabled.

Tracking ideas will not send email notifications to you.

4.8. Progressing an idea's status

As an idea is collaborated on, it will eventually flow through the PDCA (Plan-Do-Check-Act) cycle. When an idea is first created, it starts in the 'Plan' phase, as the idea is being planned and initialized. Once the idea has been thoroughly planned, the idea can start to be implemented and moved into the 'Do' phase. Once the solution has begun to take place, you can begin to 'Check' to see if the changes have made any significant impact, and based on the analysis, you may 'Adopt', 'Adapt', or 'Abandon' the idea. In order to progress an idea through the PDCA flow, two (or three depending on the idea's status) buttons will appear to the right of the current PDCA status as shown below.



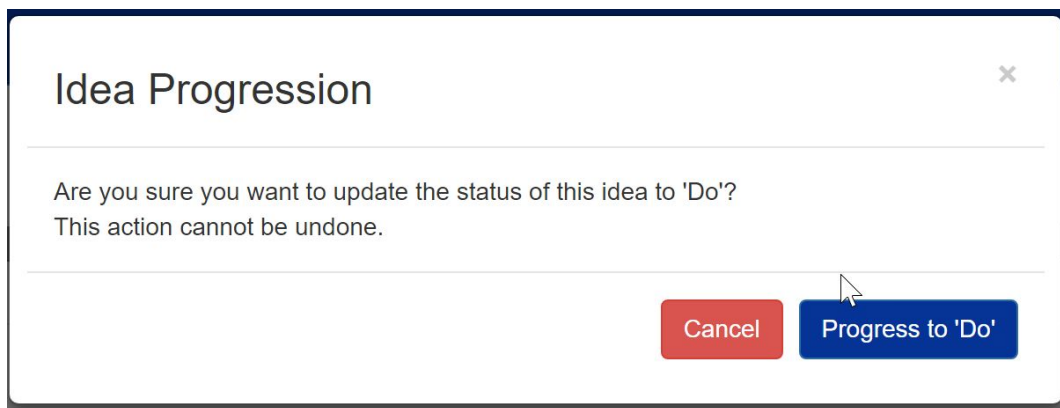
Hovering over each of the icons shows a tooltip of what each of the icons do. In the 'Plan' and 'Do' phases of an idea, the only options are to advance the idea to the next phase, or to abandon the idea. These options are indicated by the icons shown below.



While in the 'Check' phase of an idea, an idea has three possibilities for a status change. The idea can be 'Adopted', 'Adapted', or 'Abandoned'. Thus, three icons appear at this phase and are indicated below.

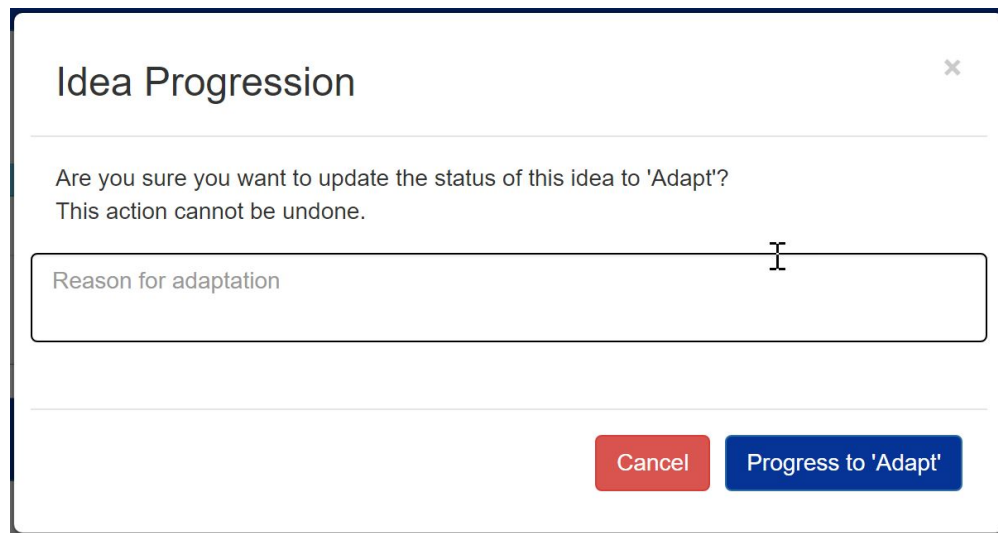


When clicking the 'Advance Idea' or 'Adopt Idea' options, the user is prompted with a modal asking them to confirm their change of status. Changing the status of an idea cannot be undone, and this modal is used to ensure that the user knows there is no going back after the status has been updated.



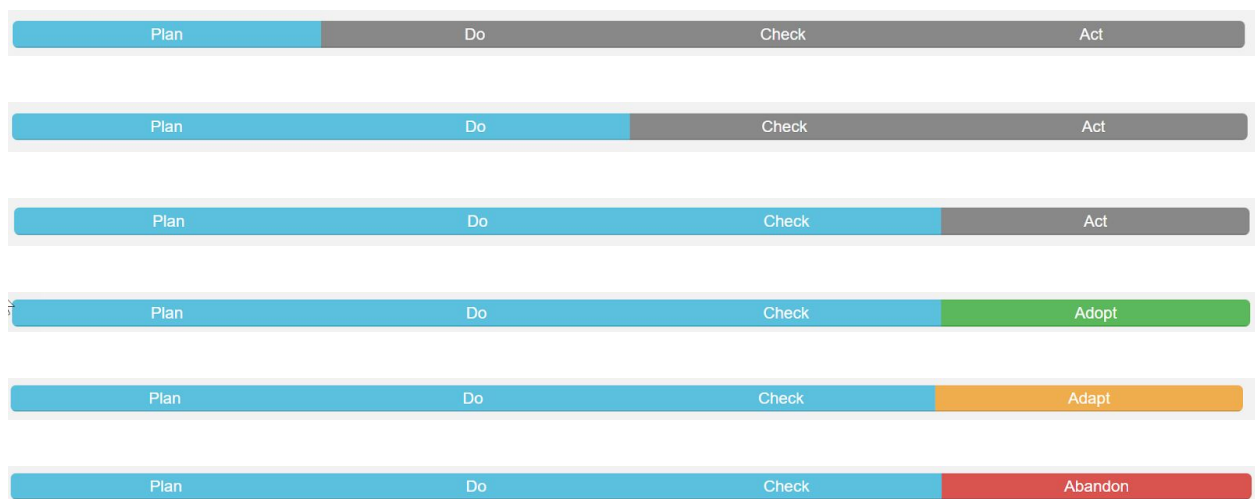
The user can confirm their actions by clicking the 'Progress' button, or they may cancel by clicking off of the modal or clicking the cancel button.

When a user clicks the 'Adapt' or 'Abandon' buttons, the user is prompted for a 'Reason for Adaptation' or 'Reason for Abandonment' as seen in the screenshot below.



The screenshot shows a modal dialog box titled "Idea Progression" with a close button (X) in the top right corner. The main text inside the dialog asks, "Are you sure you want to update the status of this idea to 'Adapt'?" followed by a warning, "This action cannot be undone." Below this text is a text input field with the placeholder text "Reason for adaptation". At the bottom right of the dialog are two buttons: a red "Cancel" button and a blue "Progress to 'Adapt'" button.

This is a required field and the user must provide some kind of explanation as to why the idea is being abandoned or adapted. Once an idea's status has been updated, the idea's status will be reflected in the idea status bar by proceeding to the next or final status after the progression has been confirmed by the user.



5. Leaderboards Page

The leaderboards page allows users to compare their activity within the application to other user's and team activity. Points are given to users for a variety of actions. 150 Idea points are given for the created of every idea, 100 Participation points are given to every comment on an idea, and 50 Participation points are given when you rate another user's idea.

Creating an idea	150 Idea Points
Amending an idea	100 Participation Points
Scoring an idea	50 Participation Points

In order to view the leaderboard, click the 'Leaderboards' in the navigation bar as shown below.



The leaderboard page will show the individual leaderboard by default, listing every user and the number of points that they have accumulated. Users with the most points appear at the top while users with a lower number of points appear near the bottom. Get to the top by creating ideas, commenting, and rating ideas!

Individual Leaderboard

Show team leaderboard: ☐

Name	Idea Points	Participation Points
Quinn Bast	1050	900
Oscar Lou	0	0
Tristan Heisler	0	0
Quinn Bast	0	0
Wilson Nie	0	0
Shawn Clake	0	0
Jennifer Herasymuik	0	0

View the team leaderboard by using the toggle at the top of the page. This allows switching between the individual and team leaderboards.

Team Leaderboard

Show team leaderboard: ☒

Name	Idea Points	Participation Points
Health Esteem	1050	900
Knowledge Management	0	0

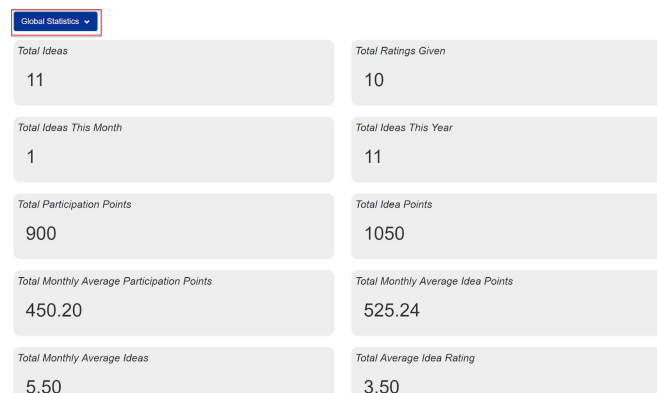
The team leaderboard will show the collective total of each team's points. Teams with the most points will appear at the top while teams with the least amount of points will appear at the bottom.

6. Statistics Page

Statistics are able to be viewed within the application for a variety of different metrics. These statistics include things like the total number of ideas submitted, average participation points per month, average idea rating, and more. View the statistics page by clicking 'Statistics' in the navigation bar as shown below.



Once clicked, the statistics page will appear, allowing the user to view their individual statistics, their team's statistics, and global statistics for every user. When first visiting the page, the global statistics are displayed by default. In order to change what type of statistics are displayed, click the dropdown box as seen below.



After clicking on the dropdown, the user can select what type of statistics they would like to view.



7. FAQ Page

To view commonly asked questions, the user can view the FAQ page. This FAQ will provide a list of commonly asked questions as well as potential solutions to these questions. To access the FAQ page, click on the FAQ in the navigation bar as indicated above.



The FAQ page provides a list of some common questions that may be asked about the application and how to solve them. This page is only an overview of some functionalities and this user manual provides a more in-depth explanation of the application.

8. Contact Page

If you need to contact someone about problems with your account, or bugs within the application, the contact us page provides details about who to contact. In order to access the contact us page, click the 'Contact' button in the navigation bar.



Once selected, the contact page will show a list of contact information about the eHEALTH organization as seen below.

Contact

[I like this site](#)

Your contact page.

[vimeo](#) [facebook](#) [twitter](#) [linkedin](#)

We're here to help. If you have a question about a program or service, contact us using one of the options below. You can connect with us during regular business hours. Our regular hours are Monday to Friday (excluding Statutory Holidays) between 8am until 5pm, Central Time.

[Show address](#)

2130 11th Avenue
Regina, Saskatchewan
S4P 0J5

General questions email servicedesk@eHealthSask.ca