

NE CSU Sustainability App User Guide

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1. Introduction

The **Sustain** app helps in achieving Sustainability Goals through Hybrid Work by bringing the workforce together on a single solution built on Teams that ignites employee engagement, tracks individual or organization-wide progress, and raises awareness around Sustainability.

The Sustain app allows users to:

- Create personal views to track how users are making impact and contributing to organization-wide, company-wide goals or individual goals
- Brings resources, company campaigns, trainings, and local community news into one library so that users can stay informed around activities they can participate in
- Allows users to send praise to colleagues who are contributing to Sustainability goals, create leaderboards and enables users to share their stories to boost engagement and inspire others to get involved
- Track organization-wide efforts and ignite a holistic workforce that is contributing to Sustainability to attract talent and meet industry standards/regulations

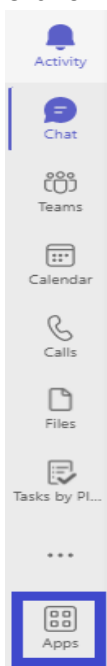
This document will help End Users to understand the Sustainability app features, how to Accept a Challenge and complete it. Also gives the visualization of the points earned by the end user and what Badge user has earned.

This document will also help Admin users to understand how the configuration of Challenges, SharePoint Site, News & events, Carousel items are done.

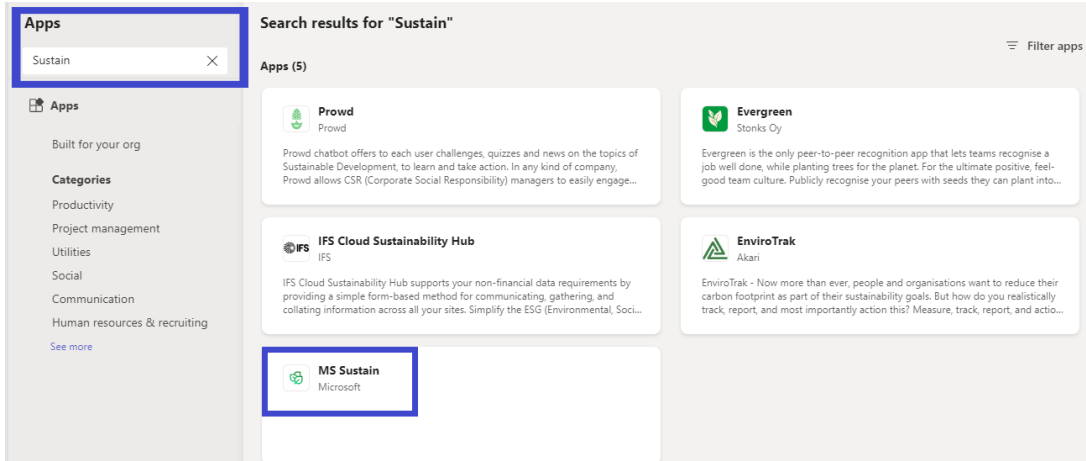
Let's get started,

How to Open an app –

1. Open the link <https://teams.microsoft.com> with user's id and password.
2. Click on Apps on left menu



3. Search for 'Sustain' app and click to Add the app



4. Once app gets added, Home screen for the User/Admin will get open

2. User/Employee

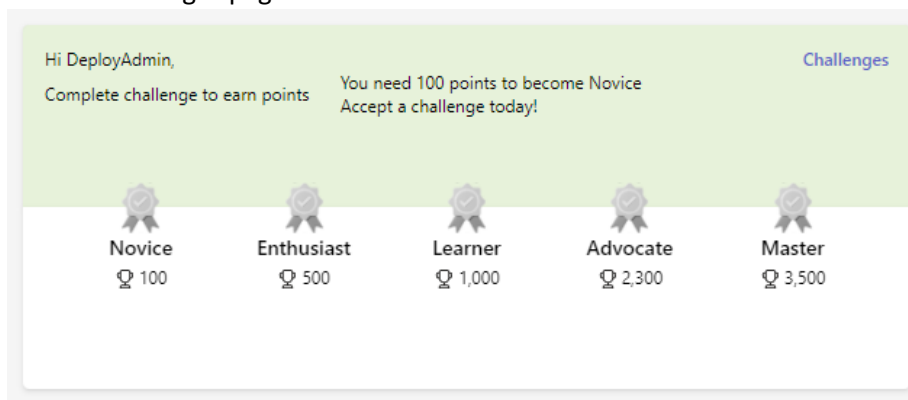
2.1 Home

2.1.1 Personal Card

This card shows the personal information about the user's progress in the sustainability cycle so that user can take necessary actions for his/her learning and contributing path.

Personal Card displays below information,

- Message
 - Hi "First Name", points and information on how to reach to next level
- Highlight current level/badge
- Badges/level information
- Link to Challenges page

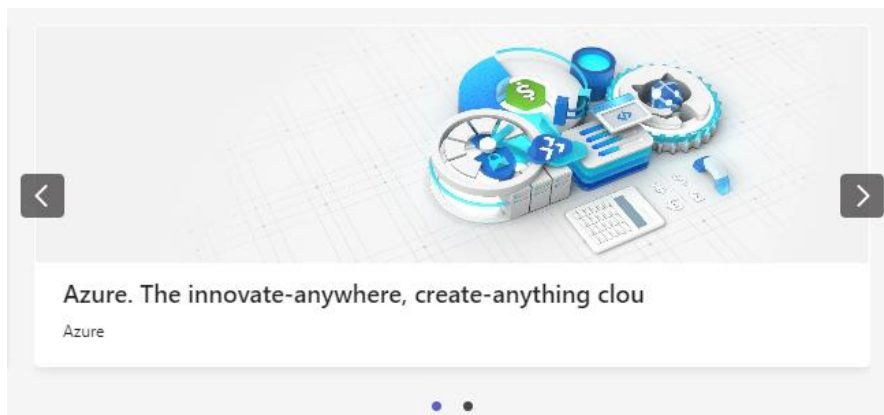


2.1.2 Carousel Card

This card shows the organization related information so that User can learn more about the information and initiatives taken by an organization

Carousel Card displays below information,

- Max carousel 5 items are displayed on the card
- On click of carousel item, the information page opens in new tab



2.1.3 News

This card shows local news from the SharePoint site so that the User can learn more about what's happening around.

(This is configurable card, if Admin has enabled this card from settings screen, then only User will see this card on Home screen.)

- Max 4 News articles displays on the card
- On click of news item, News details opens in new tab
- See all button redirects User to a browser with all News items

2.1.4 Events

This card shows events from the SharePoint site so that the User can learn more about what's happening around.

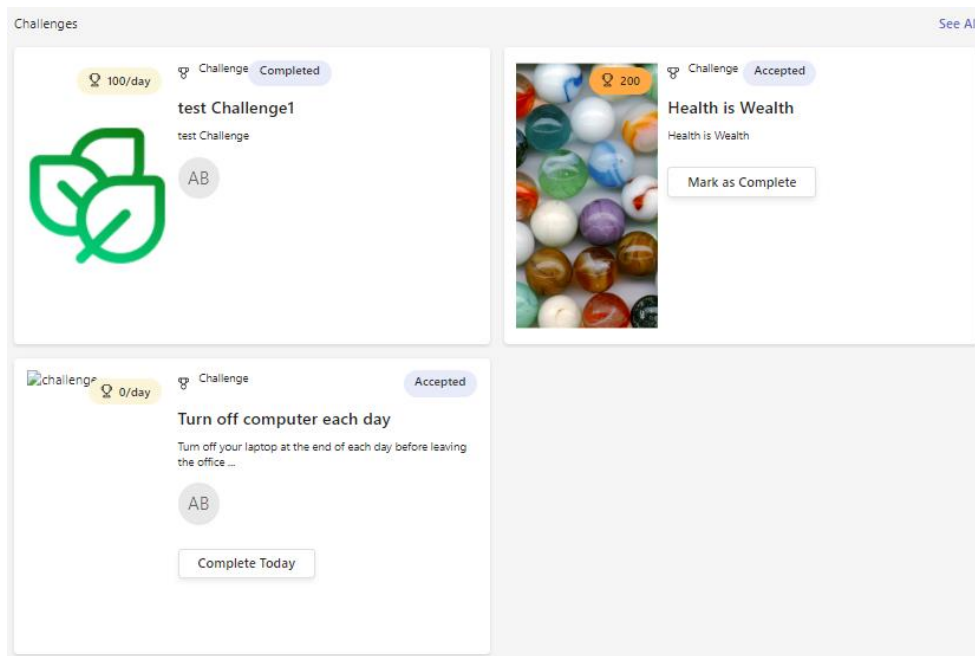
(This is configurable card, if Admin has enabled this card from settings screen, then only User will see this card on Home screen.)

- Max 2 events are displayed based on upcoming date nearest to today, including today (not past events)
- On click of item, event details open in new tab
- See all button redirects User to a browser with all events

2.1.5 Challenges Card

This card shows the important Challenges to be completed by User so that he/she can progress through the sustainability path

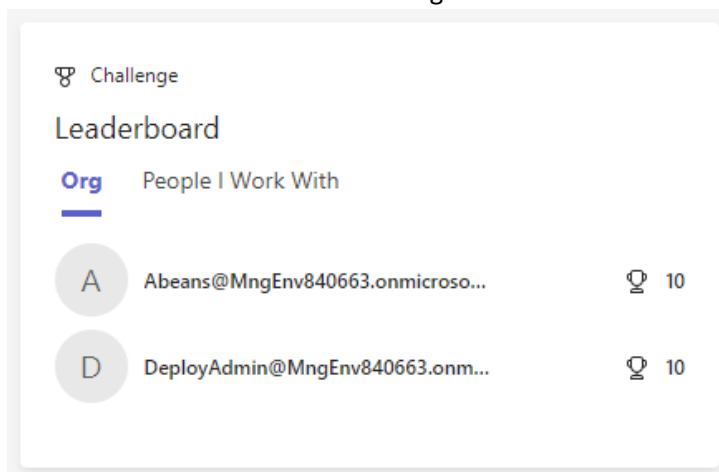
- Max 4 challenges are displayed
- Each challenge card displays the information about challenge,
 - Points for the challenge
 - Status of the challenge (Accepted/Completed)
 - Title
 - Description
 - Button for next action
 - Learn More – If Challenge is not accepted
 - Mark as Completed – If Challenge is Accepted and is One Day Challenge
 - Complete Today – If Challenge is Accepted and is Recurring/Daily Challenge
- Challenges are sorted based on
 - Pinned challenge by Admin (Admin has a feature of pin up to 4 challenges that appear in the home tab/dashboard)
 - Challenge created date (recent challenge first)



2.1.6 Leaderboard

This card shows the leaderboard of people relevant to logged in User and organization so that User can have complete visibility on his/her colleagues position in their sustainability journey

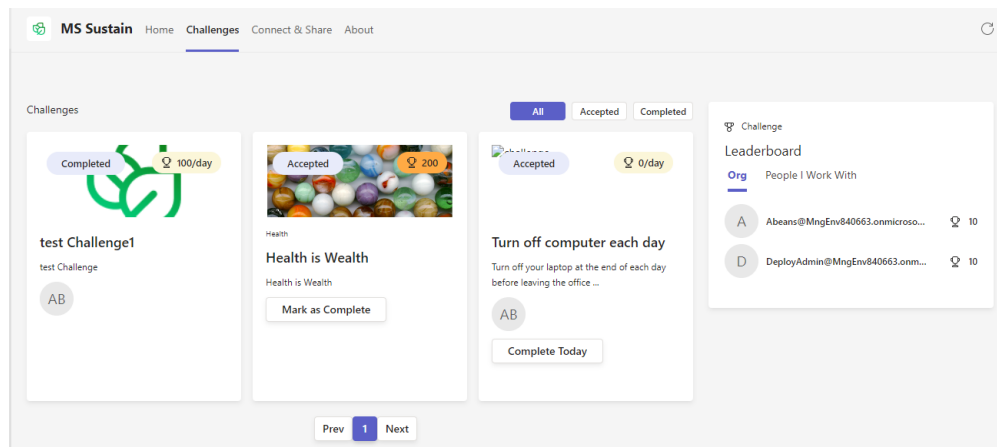
- Title of the card: Leaderboard
- 2 pivots are displayed
 - Org
 - People I work with
- Displays max 5 users in both the pivots
- Sorting of the people in Leaderboard is based on:
 - Points in descending order
 - For same points, the user who completed the challenge earlier is placed at top.
- Default view for Leaderboard is "Org"



2.2 Challenges

This tab has different view of challenges so that User can easily filter on challenge that he/she Joined or Accepted for better tracking

- There are 3 Primary views for user
 - **All** - All active challenges published by admin. Active challenges are challenges that with due date/active until date > today.
 - **Accepted** - All accepted challenges by the user which are still active
 - **Completed** - All completed challenges. For recurring challenges which are still in progress, we will show all previous completed instances in single card view with details on how many instances were completed.
- Archived/Expired challenges appear in the Completed view if user has completed the challenge
- All views are sorted based on:
 - Pinned challenge by Admin (Admin has a feature of pin up to 4 challenges that appear in the home tab/dashboard)
 - Created date by descending order



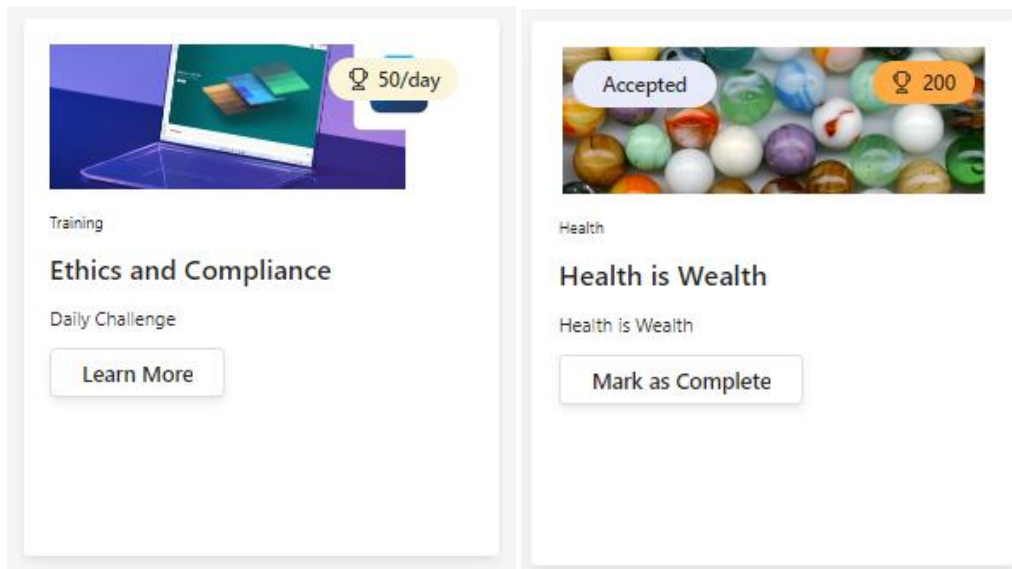
2.2.1 Challenge card (individual card)

This card shows the key information on challenge within the card view itself so that accordingly User can opt to learn more

Below are the key components of the challenge card

- Status
 - None, if not yet accepted
 - "Accepted" if challenge is accepted
 - "Completed" if challenge is completed
- Image for the Challenge
- Points for the Challenge
- Focus Area (if applicable)
- Title
- Brief description - 50 chars in 2 lines and then "...." in the end
- Relevant people (me/people/)
 - Max 4 displays and then total number of remaining people

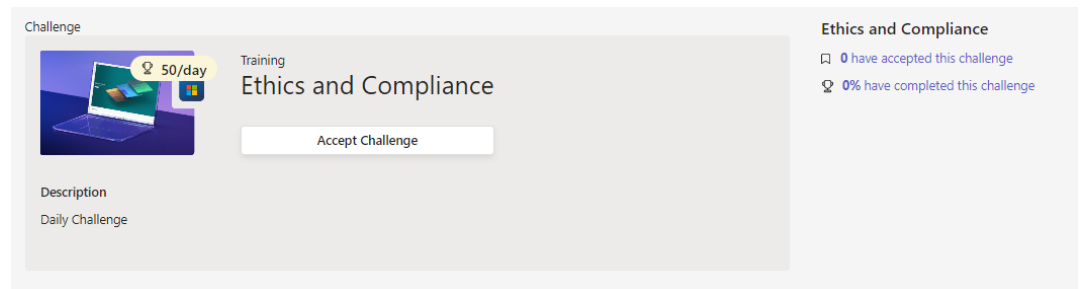
- Buttons
 - Learn More - for new challenge that is not yet accepted
 - Mark as complete - for accepted challenge



2.2.1.1 Challenge - Learn More

Learn more screen briefs about the challenge so that user can accordingly take actions

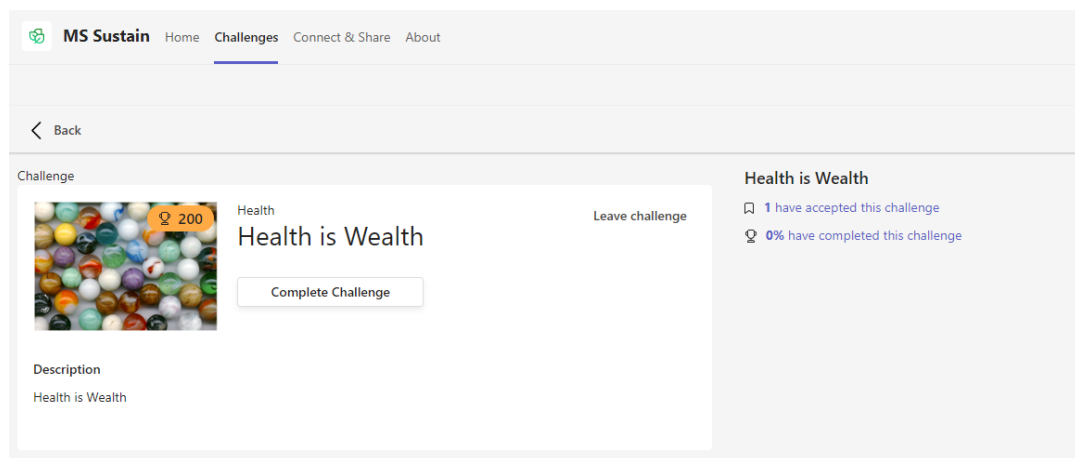
- On click of "Learn more" within a challenge card, a page will appear with below layout
 - Back button - to go back to challenges tab OR dashboard from where "Learn more" was invoked
 - Challenge details
 - Image
 - Points
 - Focus area (if applicable)
 - Title
 - Button (Accept challenge)
 - Description
 - Useful resources (if any)
 - Key metrics/analytics
 - how many in organization have accepted this challenge
 - % of users who completed challenge
 - People I work with in this challenge
 - Displays all people I work with who accepted/completed this challenge
 - Sorted based on the order followed by me/people
 - Underneath each people card showcase whether the challenge is accepted OR completed
 - If completed and is a recurring challenge, then # of times completed is displayed
 - If no one in my circle/people, I work with accepted the challenge then message "You can be the first one in your circle to accept the challenge" is displayed



2.2.1.2 Accept and Complete Challenge

From the learn more page, User can accept the challenge using "Accept Challenge" button

- On clicking "Accept Challenge" button new page will appear with all the details,
 - For one time challenge, instead of "Accept Challenge", user will have "Complete challenge" button
 - Once clicked on "Complete challenge". Status of challenge will move from "Accepted" to "Completed" in Challenge tab
 - For recurring challenge, instead of "Accept Challenge", User will have "Complete Today"
 - Once clicked on "Complete Today", it will be logged as completed instance for today and text over button will disappear and appears again at 12AM. Challenge will appear under Accepted tab only.
- Leave challenge button will be displayed at the top to Leave the challenge.

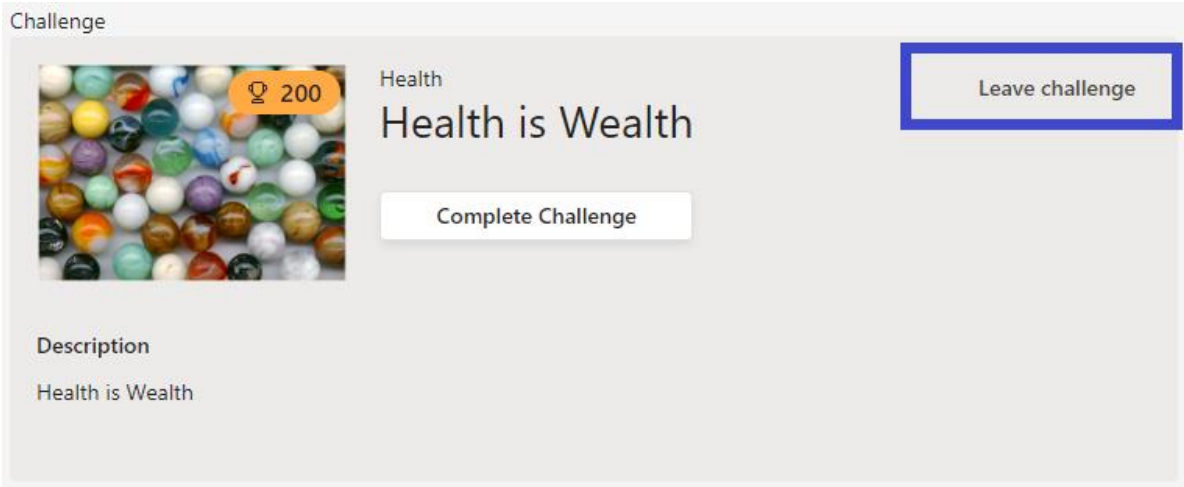


2.2.1.3 Leave Challenge

User can leave a challenge in a situation wherein User cannot complete the challenge, he/she have a way to opt out

On click "Leave challenge", the challenge will be left by the User, and it will be again available in the Challenges tab under All challenges.

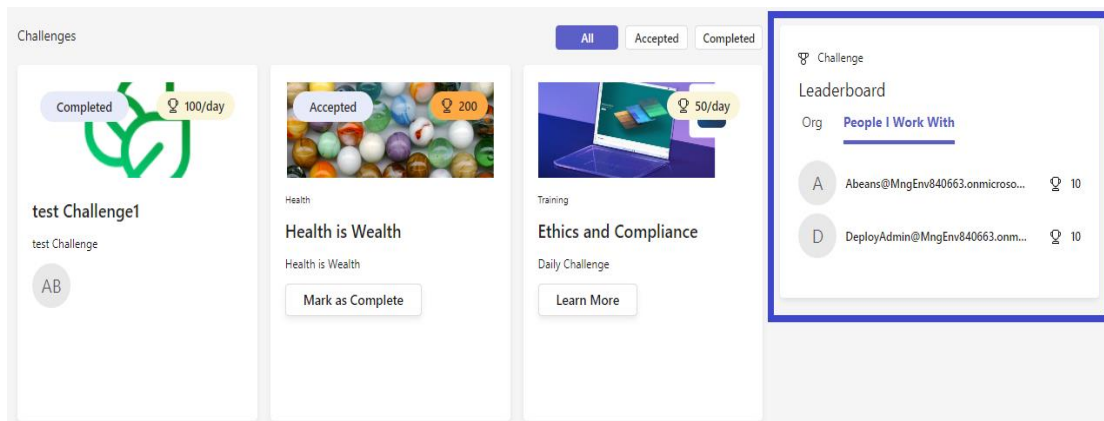
Left challenge will be removed from the Accepted tab and if the challenge is recurring then all accumulated points till, he/she left will be counted.



2.2.2 Leaderboard

Leaderboard on Challenge tab displays below details,

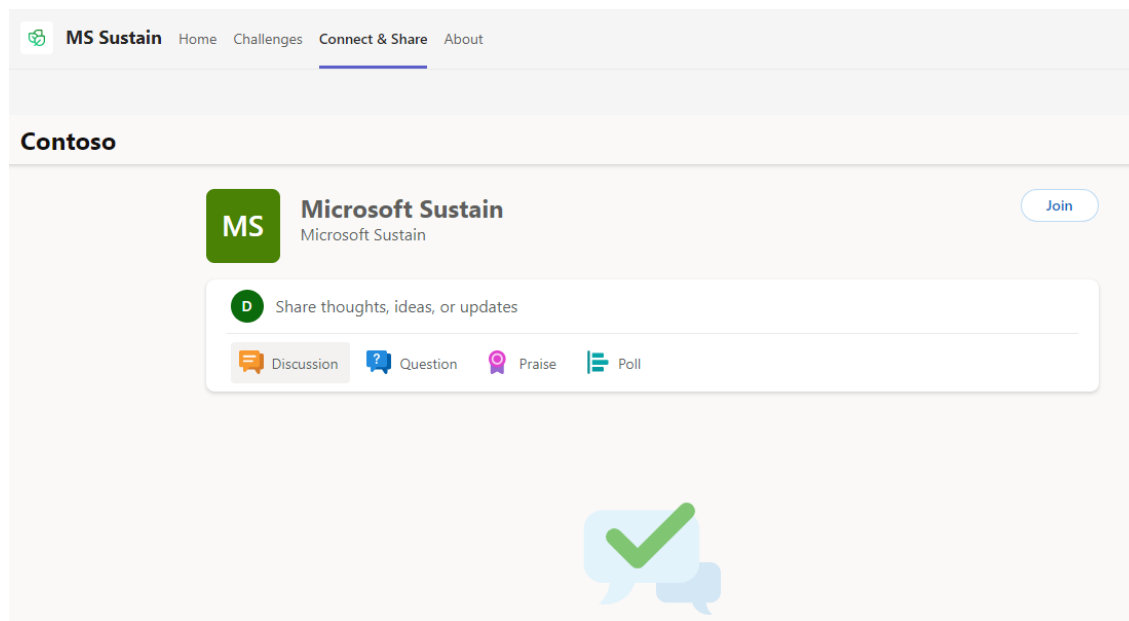
- Title of the card: Leaderboard
- 2 pivots
 - Org
 - People I work with
- Display max 10 users in both the pivots
- Sorting of the people is based on:
 - Points earned in descending order
 - For same points, the user who completed the challenge earlier is placed at top.
- If display picture is missing, then the name initials are displayed



2.3 Connect & Share

In this screen, User collaborates with other colleagues/employees so that User can recognize them. Also User can share his/her story related to sustainability so that other colleagues/employees can be inspired.

Users can see the Yammer community where users can view or share their thoughts.



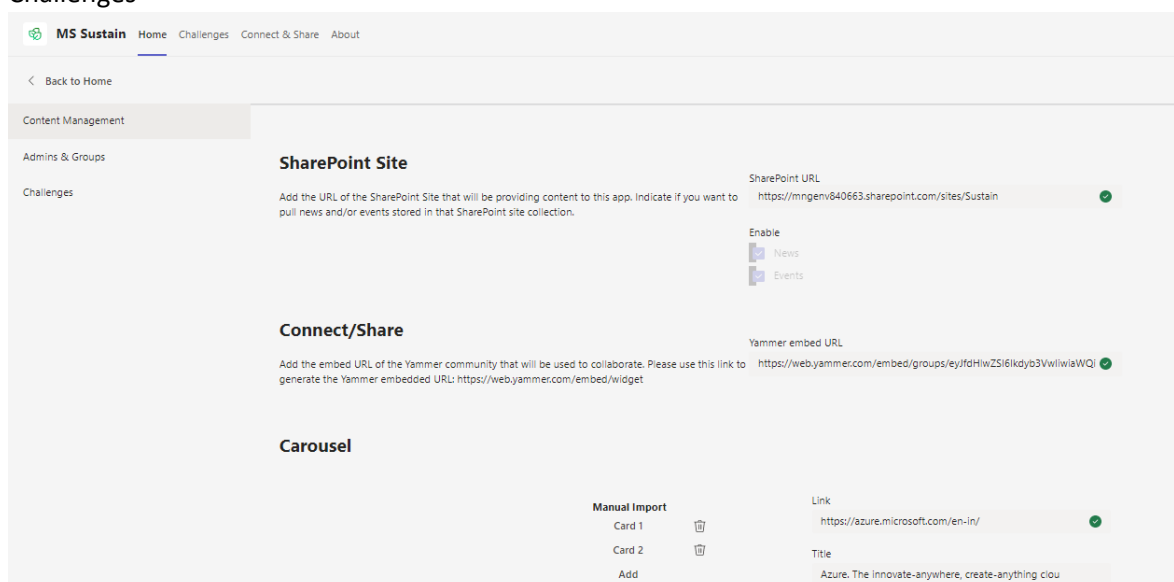
3. Admin

When user is added as an Admin to the Sustainability app, then upon login into the app. Admin will see a notification bar at the top of all the screens.

Notification message content "This notification only appears for admins. Please click "Admin settings" to manage configuration." A clickable button 'Admin Settings' will be displayed on the notification bar.

Clicking on 'Admin Settings' button, a new screen with 3 tabs for configurations will appear.

1. Content Management
2. Admins & Groups
3. Challenges



3.1 Content Management

Content Management includes 3 configurations,

1. SharePoint Site
2. Connect/Share
3. Carousel

3.1.1 SharePoint Site

In this configuration, Admin can add the SharePoint url to which the app will be connected so that News and Events data can be populated

- After updating the SharePoint url, on click away or navigating to other fields, the site url is validated
 - If validation is successful, a green tick mark is shown at the right end of text box
 - If validation fails, a red cross is shown, and an error popup is thrown asking user to update the right SharePoint url.
- News and Events checkbox field are disabled by default, once the SharePoint url is validated, both the options get enabled.
- None of the fields will be auto saved. Admin will click the save/submit button to save the changes.

< Back to Home

Content Management

Admins & Groups

Challenges

SharePoint Site

Add the URL of the SharePoint Site that will be providing content to this app. Indicate if you want to pull news and/or events stored in that SharePoint site collection.

SharePoint URL
https://mngenv840663.sharepoint.com/sites/Sustain

Enable

☒ News

☒ Events

3.1.2 Connect/Share

In this configuration, Admin needs to add the embed URL of the Yammer community that will be used to collaborate.

- After updating the Yammer url, on click away or navigating to other fields, the site url is validated
 - If validation is successful, a green tick mark is shown at the right end of text box
 - If validation fails, a red cross is shown, and an error popup is thrown asking user to update the right Yammer url.

< Back to Home

Content Management

Admins & Groups

Challenges

SharePoint Site

Add the URL of the SharePoint Site that will be providing content to this app. Indicate if you want to pull news and/or events stored in that SharePoint site collection.

SharePoint URL
https://mngenv840663.sharepoint.com/sites/Sustain ✓

Enable
☒ News
☒ Events

Connect/Share

Add the embed URL of the Yammer community that will be used to collaborate. Please use this link to generate the Yammer embedded URL:
https://web.yammer.com/embed/widget

Yammer embed URL
https://web.yammer.com/embed/groups/eyJfdHlwZSI6Ikdyb3VwIiwiaWQi: ✓

Carousel

Manual Import

Link
https://azure.microsoft.com/en-in/ ✓

3.1.3 Carousel

In this configuration, Admin can add the links and associated image for the carousel so that the same can reflect to end user/employees.

- Admin can add Max 5 carousel items
- Admin can remove the added carousel item by using bin icon

Configuration of carousel item contains,

- Link - To be validated like SharePoint site url validation
- Title - Max 50 chars
- Thumbnail/Picture - Only non-animated pictures (png, jpg, jpeg, Max size - 1 mb)
- Remove bin to remove the Thumbnail/picture uploaded
- Description - Max 255 chars

None of the fields will be auto saved. An admin needs to click the Save button to save the changes.

Carousel

Manual Import

Card 1 Card 2 Card 3 Card 4 Card 5

Link
https://www.microsoft.com/en-in/windows?r=1 ✓

Title
Make every day easier

Thumbnail
RE59lHb_438fa66b-e8f3-477d-b545-f9b840b6de75.png
Choose File No file chosen Remove

Description
Make every day easier

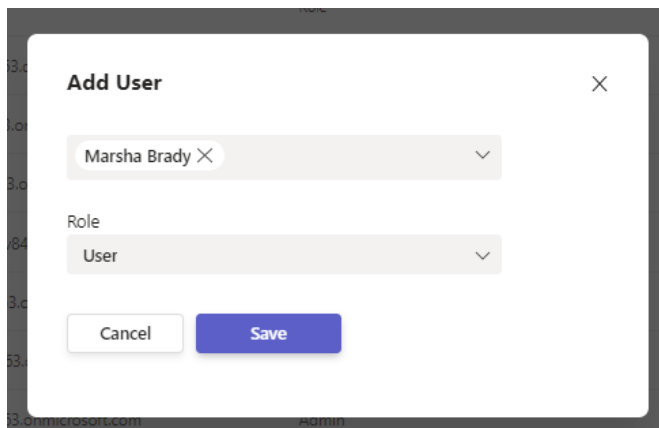
3.2 Admins & Groups

In this configuration, Admin can update/add Admins/Users for the teams app so that within single app experience Admin is able to manage users.

3.2.1 Add new user

In Admin Settings -> Admin & Groups tab, click on New User button. A popup will appear to enter the New User's data.

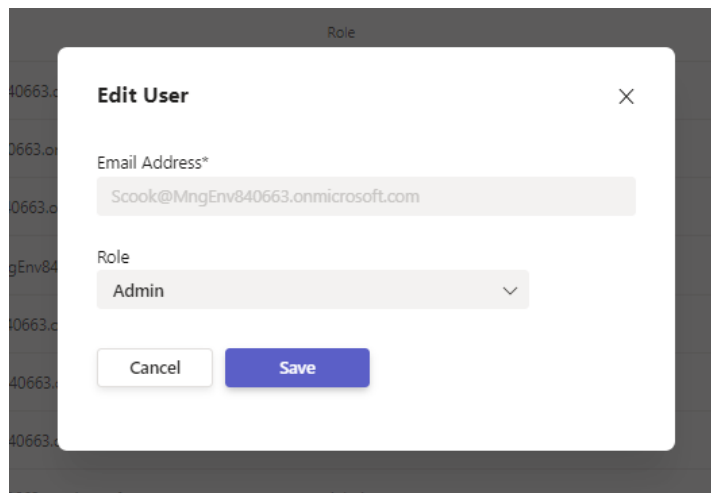
1. Username – Start typing the name of the user. It's a people picker field which will suggest the user's name according to the entered name. Select the Username from list.
2. Select the role of the User (User/Admin) from Role drop down.
3. Click on Save to save the user into the list.



3.2.2 Edit User

In the Admin Settings -> Admin & Groups tab, click on edit button in front of user email address. Admin can only change the role of the user, other fields will be disabled.

Change the role and click on Save. Changes will get saved for the user.

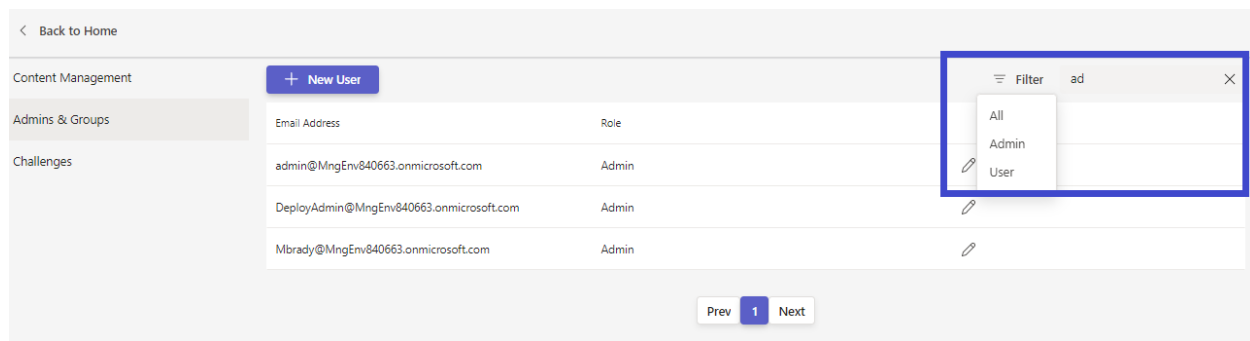


3.2.3 Filter and Search the user

In the Admin Settings -> Admin & Groups tab, go to Filter option at the top. Admin can see 3 options to filter,

1. All – Selects all the users
2. Admin – Filters the users with Admin role
3. User- Filters the users with User role

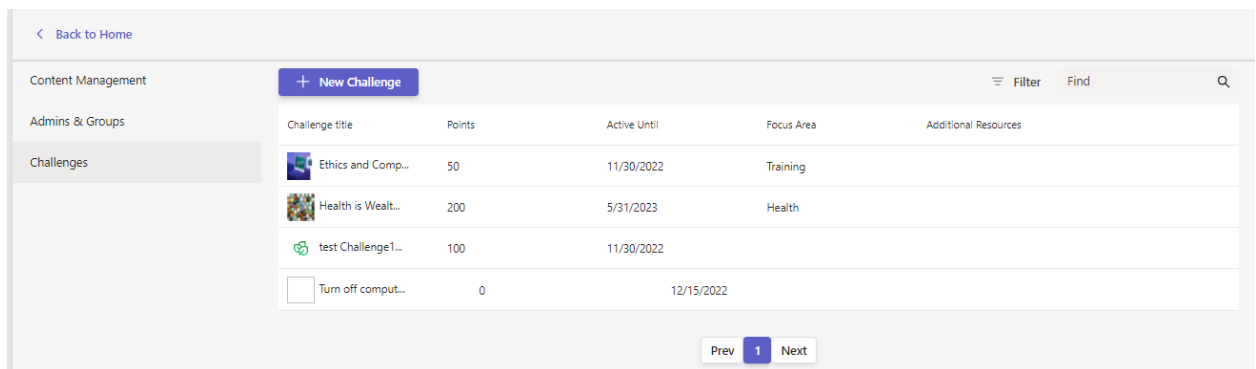
Admin can search the user by searching email id in Search box.



3.3 Challenges

In this configuration, Admin can create, update and archive challenges so that employee/end user experience can be controlled.

- Admin can filter the Challenges using Filter option at the top.
 1. "Active" challenges – default filter, displays all active challenges
 2. "Archived" challenges – archived challenges of past date
- Admin can search the challenge based on title or description using Search box.
- No bulk actions can be taken for updating challenges, admin needs to select one challenge at a time



3.3.1 Create challenge

For creating a new challenge, click on "New challenge" button. Popup will appear with below fields,

1. Challenge title - Max 50 chars
2. Pin to Dashboard - Yes/No (Max 4 challenges can be pinned by admin)
3. Challenge Frequency
 - a. For Daily, label for Points field will be "Points per day"
 - b. For One-time challenge, label for Points field will be "Points"
4. Points/Points per day - number field
5. Thumbnail/Picture - Only non-animated pictures (png, jpg, jpeg, max size - 1 mb)
6. Description - Max 255 chars
7. Active until - Date picker (future date only, include today based on users timezone)
8. Focus area – text field
9. Additional resources - Web url with validation functionality

10. Save and Cancel buttons

Fill in all the required fields and click on the Save button. Challenge will be saved and is available for all Users/Employee in their Challenge tab/on Home screen in Challenges section (if challenge is pinned).

Add Challenge

Challenge Title*

Pin to dashboard

☐ Yes

☒ No

Challenge Frequency

☐ Daily

☒ One-time challenge

Points*

Thumbnail*

Choose File

No file chosen

Description*

Active Until

November 21, 2022

☒

Focus Area

Additional Resources

Cancel

Save