

### Welcome

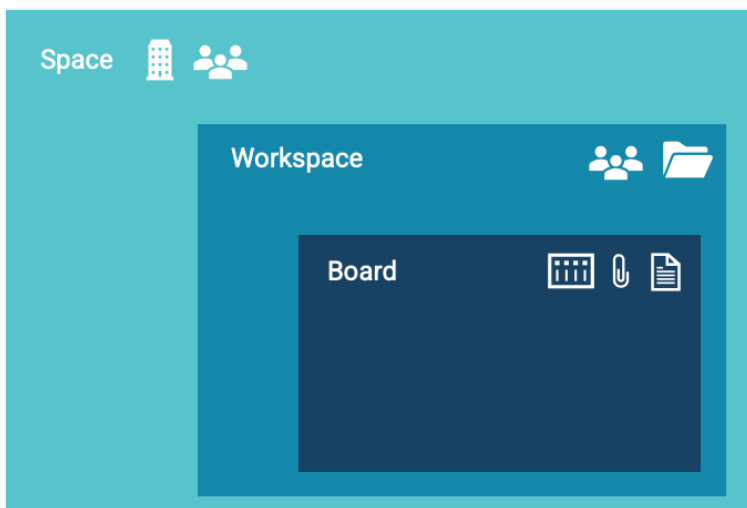
Welcome to PosterLab's Help & Support Page - we help you make partnerships succeed. The following is divided into a wiki - if you are curious to know more about Posterlab - and tutorials to guide you step by step through creating your own collaboration environment in PosterLab.

If you did not find what you were looking for, please contact our support. The contact data is given at the bottom of the page.

### PosterLab Wiki

#### About the platform structure

The platform imitates the usual structure you have in an organization. Your space (organization) where you can have multiple workspaces of people that work together with other companies on different partnership projects. More information on these individual levels is below.



#### The Workspace level

The Workspace is the heart of PosterLab. Here you get an overview of all your boards, the gallery (documents), people and partners.

Usually workspaces are business units or associations that are working together on projects.

There are three workspaces visibilities you can choose from:

- **Organization:** Organization members can see and optionally join the workspace
- **Private:** Only you and invited members can see and participate in the workspace

#### The Board level

A workspace can have multiple boards. On a board, you can give the projects associated with your workspace a structure by staging them in Tabs.

There are three board visibilities you can choose from:

- **Organization:** Organization members can see and optionally join the board
- **Private:** Only you and invited members can see and participate in the board
- **Shareable:** The board is accessible to anybody with the link

## Tabs

With Tabs you give the overview on your projects. You can use templates for staging projects based on their maturity in legal or procedural requirements or on their overall health ranking.

## Roles and permissions

PosterLab work with four roles that come with different permissions. To make it easier to decide who gets which role, we have included an overview:

- **Owner:** Has all permissions, is able to delete and add users, can give people admin rights
- **Admin:** Has the same permissions as the owner, except he cannot delete the owner
- **Member:** Can view and edit, but is not able to access users management
- **Guest:** Can only view and not edit

## Tutorials

### Getting started

Get started by logging into your PosterLab workspace. If you do not have an account yet, please ask one of your teammates to send you an invitation to the workspace. You should receive an email with a link. If not, please check that your email is spelled correctly and that it did not land in your spam folder. If you have successfully logged in, you can now see your workspace.

### Creating a workspace

Clicking on the Posterlab logo in the top left corner or the home icon underneath it will redirect you to an overview of all workspaces you have permission to. If you are in the role of "Admin" you can add, edit, and workspaces. When you click on "New Workspace" a pop-up window will appear that asks you for the workspace name and its visibility settings.

### Creating Boards

To create a board, you have to be inside a workspace. Here you will see a clickable "See all" text next to "Boards". Here you have an overview of all the boards you have access to inside the workspace. On

the top right corner, you can click "New board". In a pop-up window, you will be asked to type in the board name and set the visibility.

### **Setting general board information**

Once you selected a board you can see all the tabs inside it. The first tab is always "General Information". Here you can click on "Edit content". This will open a pop-up window, that lets you edit the description of the board or extract the text from an attached document with "Extract from attachment". On the right-hand side of the window, you can add the topics of a board. Underneath you can add Keywords related to the board. At the bottom of the window, you can upload attachments to the board (max 8 files. 10MB / file).

### **Adding Tabs to boards using templates**

When you selected a board you can see all the tabs inside it. On the right-hand side click "Add new tab". This will open a pop-up window that lets you set the tab title, and the tab type and lets you choose from pre-made templates. By clicking on "Add Tab" at the top right corner, you create the tab and are now able to see it next to other tabs on the board.

### **Inviting people to workspaces**

You can reach the "Invite People" pop-up window in three ways:

1. From the "All workspaces" view, click on the three dots at the top right of the workspace box. Then select "User Management". Inside the "User Management" view, you can select the "Invite" button on the top right corner. This will open up the "Invite People" pop-up window.
2. When you are inside a workspace, you can select the "Invite" button that is directly under the name of your workspace. This will open up the "Invite People" pop-up window.
3. When you are inside a workspace, you can select the gear wheel next to its name and click on "User Management". Inside the "User Management" view, you can select the "Invite" button on the top right corner. This will open up the "Invite People" pop-up window.

Inside the "Invite People" window you can invite people by email and select their role and the assigned partner. At the bottom of the window you can also click on "Copy Link" to save a link to your clipboard. Everybody with the link can gain access to your workspace, as long as you have the option "Share this link to invite people to the workspace" on "Enabled".

### **Adding partners**

When you are inside a workspace, click on "Partners". Here you can click on the "Add partner" button at the top right corner. This will open a pop-up window. Here, you can type the partner's name, nest the partner under another existing one, set the used domain, set skills to the partner, and upload a logo. Once you've put all the wanted options, choose "Add partner". The partner will now appear in the partner overview and people can be assigned to this partner.

### **Create cards**

Inside a board, you can add a task to a tab, by clicking on the "+" sign next to a column. You are then asked to name the task. After clicking on "Save" the task will appear in the selected column.

## Assign people and partners to tasks

When you click on a task inside a board, the task will open in a pop-up window. In the window you have multiple settings to specify the task. You also have the options to assign the task to different people or partners. When you click on the "+" sign underneath "Assignee" or "Partners", a list of the people or partners connected to the workspace will show up, where you can choose the people or partners to assign the task to.

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## Set up the RSS Feed link in Microsoft Teams

Receive notifications in the chats or channels you use with your partners in Microsoft Teams, by configuring the workshop RSS Feed link.

1. Once logged into **Teams**, click on the **Apps** icon located on the left-hand sidebar.
  2. Type **RSS** in the search box.
  3. Select **RSS Connector** that appears in the results.
  4. Select the **Add to a Team** button.
  5. Type the name of the channel to which you want to add the RSS feed and select it from the list. If you were already in a channel when you clicked "Apps," that channel will be automatically filled in, however, you can change to another Microsoft Teams channel if you want.
  6. Click **Set Up a Connector**.
  7. Enter the following:
    - Name of feed
    - RSS feed link
    - The frequency at which you'd like to check the feed.
  8. Select **Save**.
  9. The feed will now be added to the channel.
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## Contact support

We are very interested in meeting your needs in the best possible way. However, if you have any questions or comments, please feel free to contact our support team via one of the following ways:

- Email to: [support@posterlab.co](mailto:support@posterlab.co)

## Request a feature

Our app is under constant development. The best way to ensure that it meets your needs is with your help. So if there are any feature you would like to see in PosterLab, please contact us.

Just send an email to: [support@posterlab.co](mailto:support@posterlab.co)

