IDEASCALE

Introducing Workspaces for Admins

Why Workspaces?

At IdeaScale, we understand the challenges organizations face. Managing multiple communities, campaigns, members, and groups can quickly become overwhelming, resulting in wasted time, frustrated employees, and decreased productivity.
That's why we created Workspaces.

Centralized Management
Workspaces empowers you to effortlessly manage multiple communities, allocate resources effectively, and foster seamless communication.

Enhanced Navigation
Effortlessly access and navigate through different segments of your organization.

Improved Organization
Easily organize groups and members within your company, providing a clear structure for your teams.

Enhanced Collaboration
Facilitate teamwork by providing a central platform for resource sharing and interaction.

Workspaces will revolutionize the way communities interact with our platform.

WorkSpaces Hierarchy

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        Workspaces
            │
            ▼
       User Profile
         ╱       ╲
        ▼         ▼
Community #1    Community #2
```
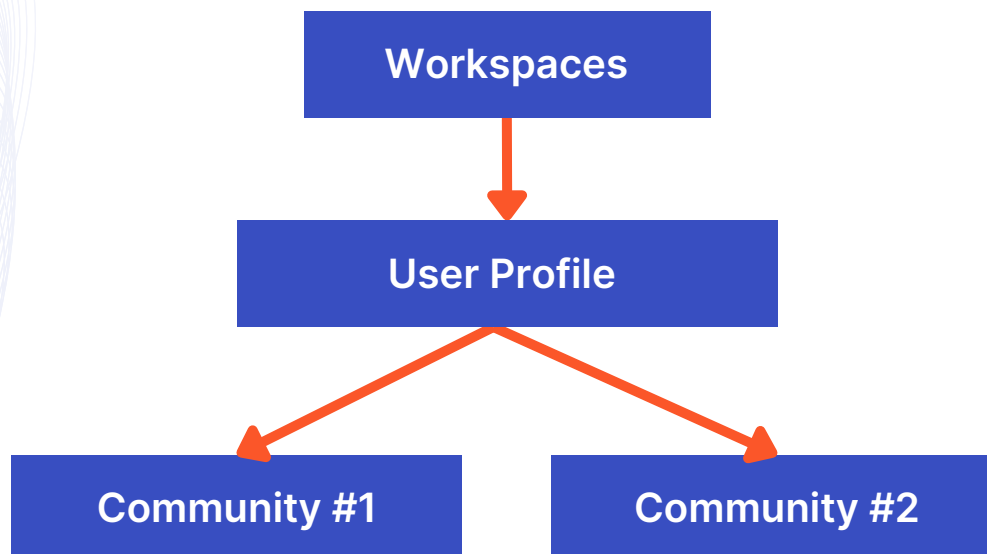
What Will Change for You and Your Members?

Registration and Login Process
Streamlined Member Registration and Authentication for Enhanced Security.

Pre-Workspaces	Post-Workspaces
• Members of multiple communities previously had to login separately to each one.	• Members of multiple communities will now have a centralized login. • Registration and authentication now occur at the workspace level. • For workspaces with mixed authentication, members must authenticate using each authentication method before gaining full access to the workspace.

Why?
Centralized authentication simplifies member management and ensures consistent security standards.

Additional Information:
- For workspaces that utilize a combination of authentication methods, members may be required to authenticate using each unique authentication method during their initial login. This ensures they have proper access to each community in the workspace.
- Workspaces with only a single community will not have their login process impacted and will not have to worry about changes for the mixed authentication use case.
- Post-workspaces, users will be prompted to re-accept all cookies, including the "Remember Me" cookie.
- If member approval is enabled, the workspaces admin will need to approve the member.

What Will Change for You and Your Members?

Enhanced Privacy Controls for Community Members

Give your community members greater control over their personal information with our privacy features.

Pre-Workspaces	Post-Workspaces
• The "Hide my Identity" option was available on the registration page only when enabled by community admins.	• Workspace Level: The "Hide my Identity" feature is not available at the workspace level. This means that users cannot hide their identity throughout the entire workspace. • Community Level: Community admins still have the option to allow members to hide their identity at the community level. This provides flexibility in managing privacy settings within individual communities.

Why?

Tailored Privacy: This change offers more granular control over privacy settings, allowing you to balance the needs of your community members with the overall security and transparency of your workspace.

Introducing a New Role: Workspace Owner

Workspace Owners are members who have the ability to edit and manage both the workspace and its communities.

Additional Information:
- The Workspace Owner will initially be set as the existing account owner, but this can be changed.
- The Workspace Owner also serves as the default workspace admin and can assign additional workspace admins as needed.

What Will Change for You and Your Members?

Member Approval

Enhanced Member Approval Workflow for Greater Control.

Pre-Workspaces	Post-Workspaces
• Member approvals were conducted at the community level.	• Workspace Level: Workspace admins now have the option to enable member approvals at the workspace level, providing greater control over who can join your workspace. • Community Level: Community admins and global moderators can still approve or reject members at the community level, allowing for tailored approval processes.

Why?
Clearly defined roles and responsibilities ensure a smooth approval process. You also have the flexibility to enable or disable member approvals at both the workspace and community level, making it easier to manage your community's membership.

Customization

While some customization options have changed, we've focused on maintaining essential features.

Pre-Workspaces	Post-Workspaces
• Security Polices were at the community level. • Admins were able to choose background image for login.	• Security policies are on the workspace level and configurable by workspace admin. • We've updated our login page for improved accessibility. While background images are no longer supported, the login text remains customizable. • You can only have one favicon per workspace and the same favicon will be used across all communities.

What Will Change for You and Your Members?
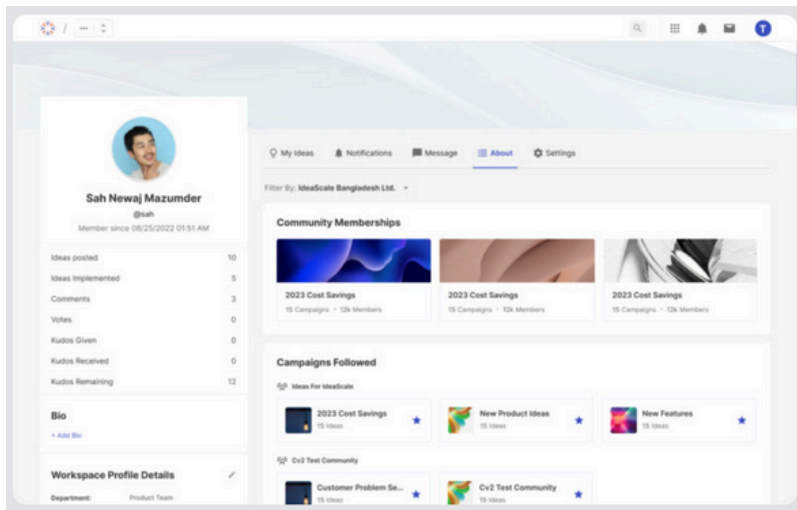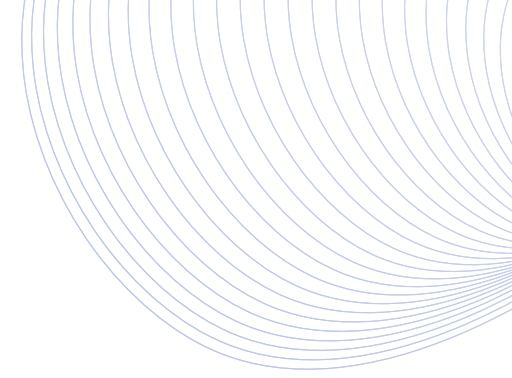
User Profile
New Profile Interface for Enhanced User Experience

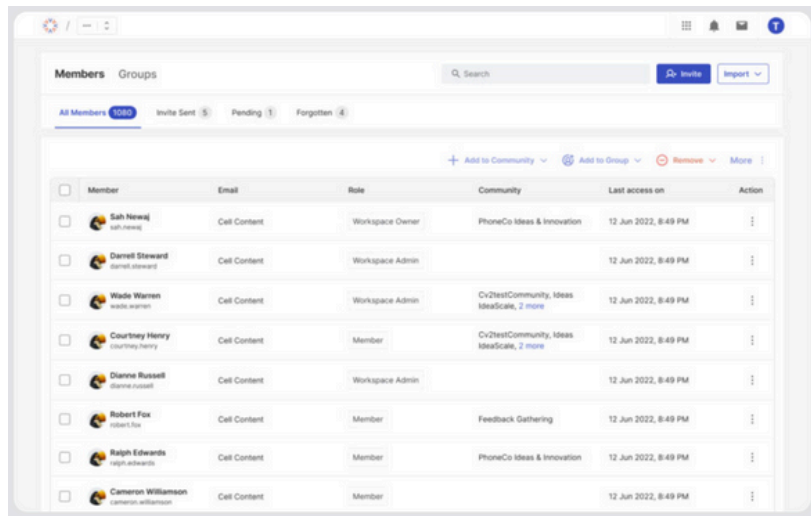| Pre-Workspaces	Post-Workspaces
• Users had a unique profile page per community.	• Workspace-Level Profiles: Users now have a unique profile page per workspace, providing a centralized view of their activities and memberships. • Community Filtering: The profile page includes a filter option to view details specific to individual communities.
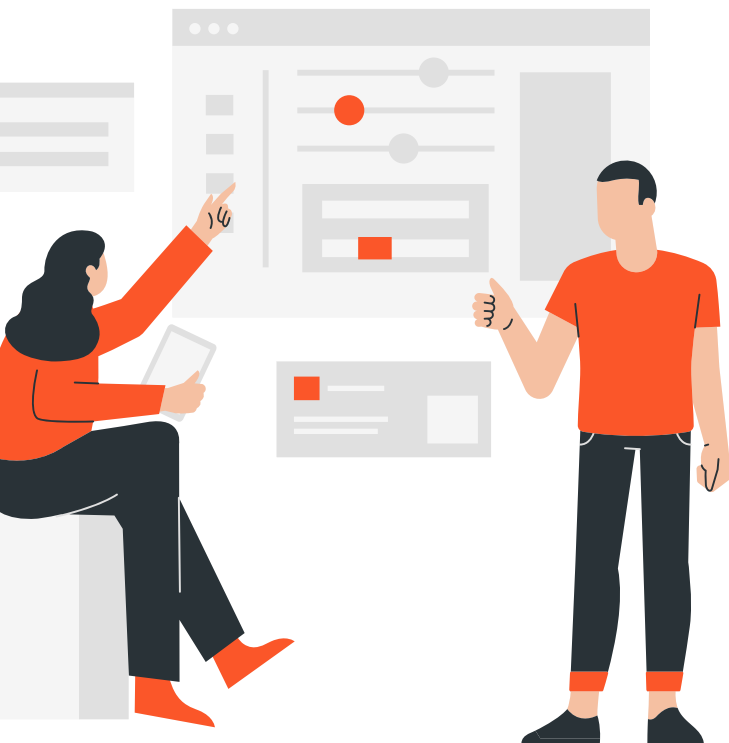
Why?
Enjoy a more tailored and informative profile page that showcases your activities and contributions across multiple communities.

Additional Information:
• The "Activity" page items have been moved to the "About" page for better organization.
• The "My Ideas - Action Items" tab has been moved to the first position to help users easily find all their action items.

What Will Change for You and Your Members?

Member Management
Streamlined Member and Group Management for Enhanced Collaboration

Pre-Workspaces	Post-Workspaces
• Member management and group management were separate processes.	• The updated design combines member details with a dedicated Group tab for managing groups. • Member management is now available on two levels: community and workspace, and admins can switch between them here. • Workspace-Level Groups: Groups created at the workspace level can be utilized across multiple communities, promoting collaboration and consistency. • It is possible to enable approvals at both the workspace and community levels. Communities will have the authority to approve, reject, or ban members within their own community.

Why?
- Improved Efficiency: The streamlined design and enhanced features make it easier for community administrators to manage members and groups.
- Enhanced Collaboration: The ability to create and use workspace-level groups fosters collaboration across multiple communities.

Introducing the New
Workspaces Home Page

The Workspaces Home Page is the central hub for users to navigate and interact with their communities within the platform. It provides a clear and intuitive interface for finding, joining, and managing communities.

Introducing the New
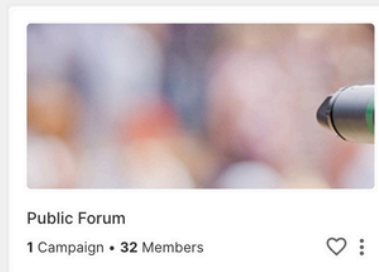# Workspaces Home Page

Workspaces Information

- Workspaces Name (editable in settings).
- Active Members count (excluding pending and banned members).
- Quick Add Members feature for Workspace Admins.
- Create Community button (for Workspace Admins, based on account settings).

Community Management
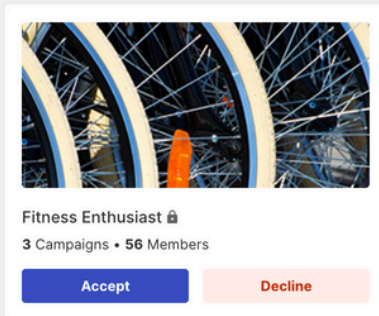
- Your Communities section:
  - Community name links directly to the community's homepage.
  - Favorite star to prioritize selected communities.
- 3 dots for options:
  - Community Settings
  - Leave Community
- Active members and campaigns display for each community.

Key Features
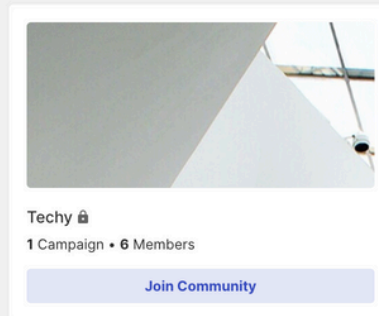
Communities You Can Join:

This section will display public communities available for joining, private communities to which the user has been invited, and private communities that allow members to request to join.

Community Discovery:

Search bar for easily finding communities and members.

- Displays communities a user can join, has been invited to, or declined.

Topbar Navigation:

9-Dot Apps Menu for accessing all apps (content varies based on user permissions).

Benefits for Users

- Efficient Navigation: Easily find and access your communities.
- Community Discovery: Discover new communities and opportunities.
- Personalized Experience: Prioritize your favorite communities.
- Simplified Management: Manage community membership and settings.

Topbar Navigation:
9-Dot Apps Menu

The 9-Dot Apps Menu is a centralized location for accessing various applications and features within the platform. The menu's content will vary based on the user's permissions and role.
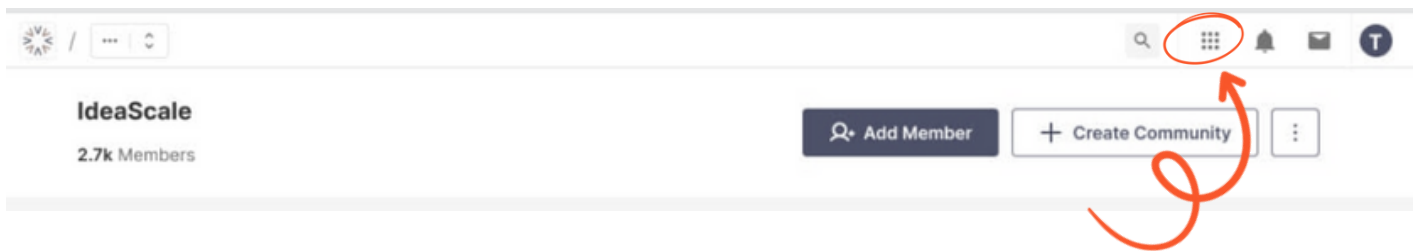
Key Features

Centralized Access:
Provides a single point for accessing multiple apps.

Role-Based Accessibility:
Displays relevant apps and features for each user type.

Efficient Navigation:
Streamlines access to frequently used tools.

Benefits for Users

- Improved Efficiency: Quickly find and access needed tools.
- Enhanced User Experience: Simplifies navigation and reduces confusion.
- Tailored Access: Provides relevant features based on user roles.

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