Fingertip for Microsoft Teams

User Guide

Full instruction to succeed with Fingertip

2022-01-11

FINGERTIP

Fingertip User Guide - Introduction

- This User Guide contains an overview of Fingertip, introductions to Fingertip objects, and step-by-step guides to get you started. Please use this guide to succeed on your Fingertip journey.
- Fingertip is best learned by using it. This guide helps you understand the logic and functionalities you need to get through the learning phase. The initial learning process takes around 30 minutes.
- The guides are also available in our knowledge base at help.fingertip.org
- You can also find some video tutorials on our Getting Started –playlist.

FINGERTIP

User Guide - Table of Contents

Fingertip Overview

How Fingertip helps you to get things done

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Reach your objectives

Fingertip is the

Easy way to Lead

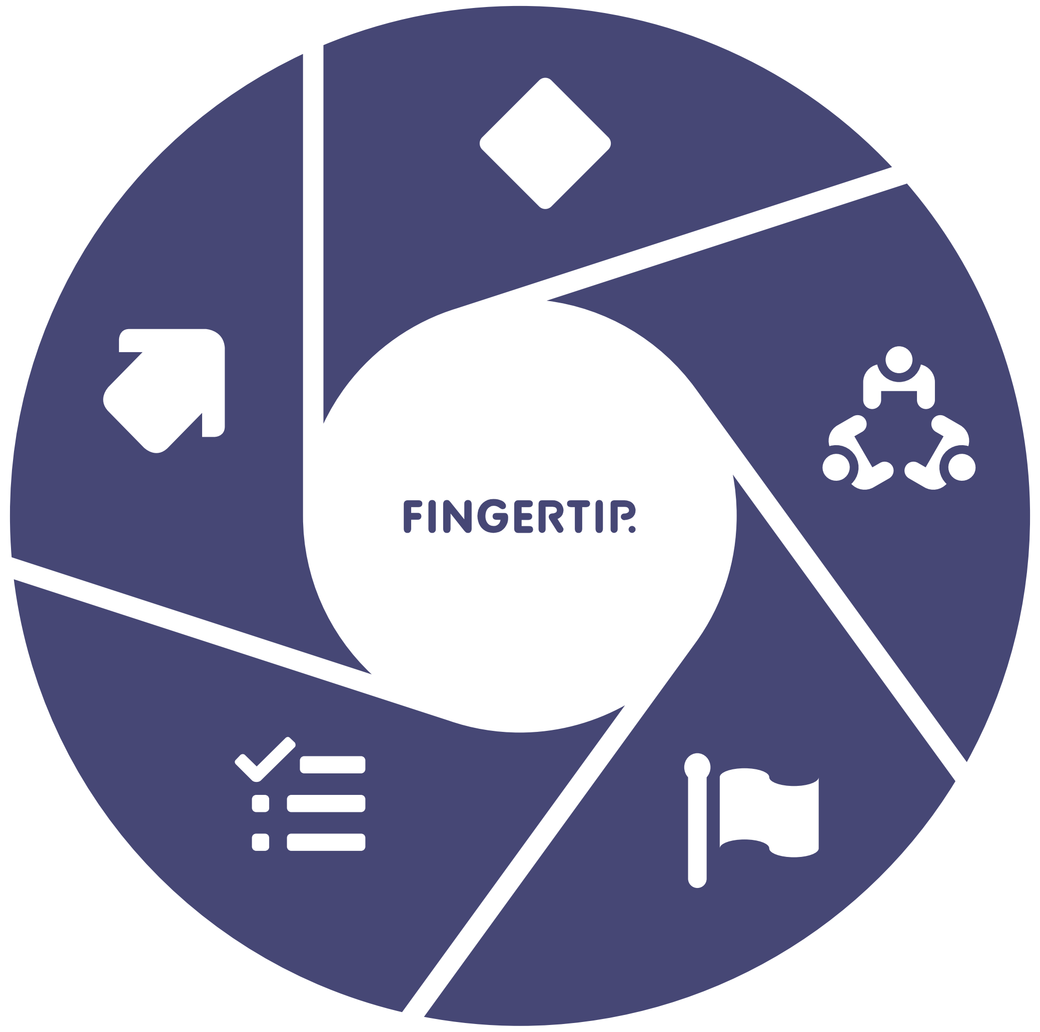
in Microsoft Teams

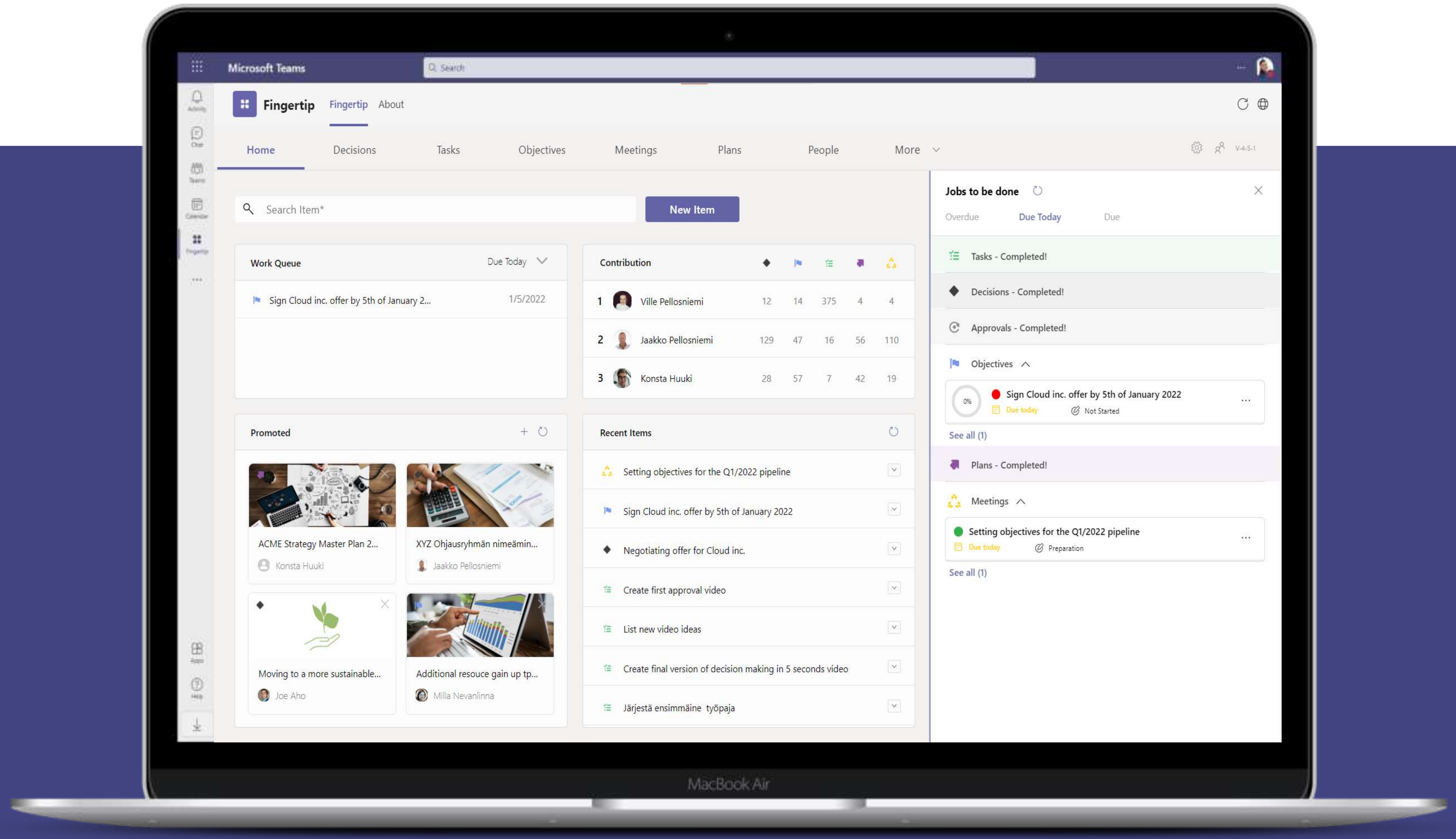
Sustainable – Documented – Transparent

Fingertip Teams

Easy way to Lead

Coordinate, manage, decide, track, plan, align, collaborate, and set objectives… in one place.



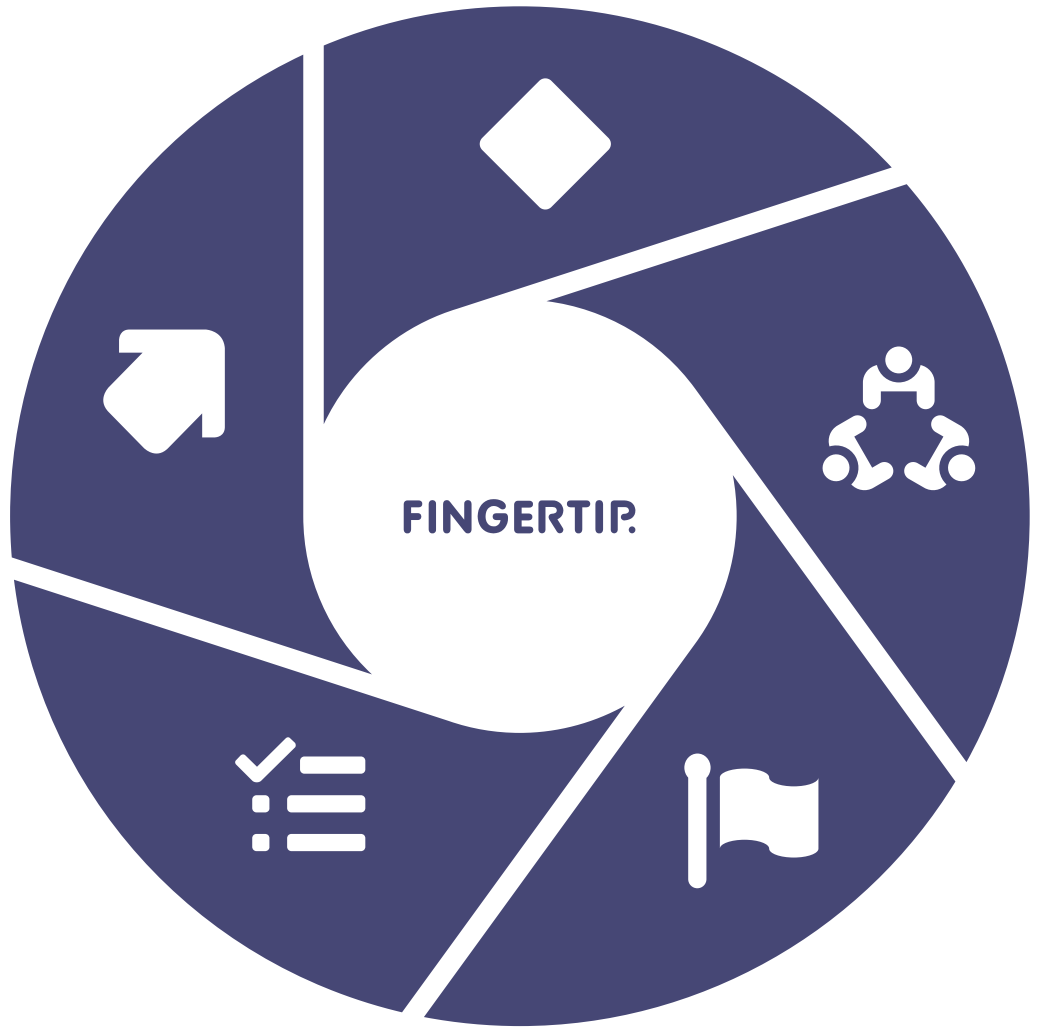


Microsoft Teams

Hub for Teamwork

Meet, chat, call, simple tasks, and co-create with files in one place

Modernize Leadership – Use Cases



Decision making & Approvals

- Fast Approvals and Complex decisions
- Participation & Commitment
- Formulating stances and proposals
- Approving of decision and follow-up
- Decision log / ledger and archiving

Meetings

- Preparation of the agenda
- Meeting invitation
- Background material and files
- Follow-up and activities
- Meeting evaluation

Objectives

- Set goals and sub-goals
- Follow-up of objectives
- Divide objectives into tangible activities
- Assessment of success

Planning

- Assignment and monitoring of tasks
- Project tracking
- Problem solving and Deviations
- Creating and coordinating contexts
- Portfolios

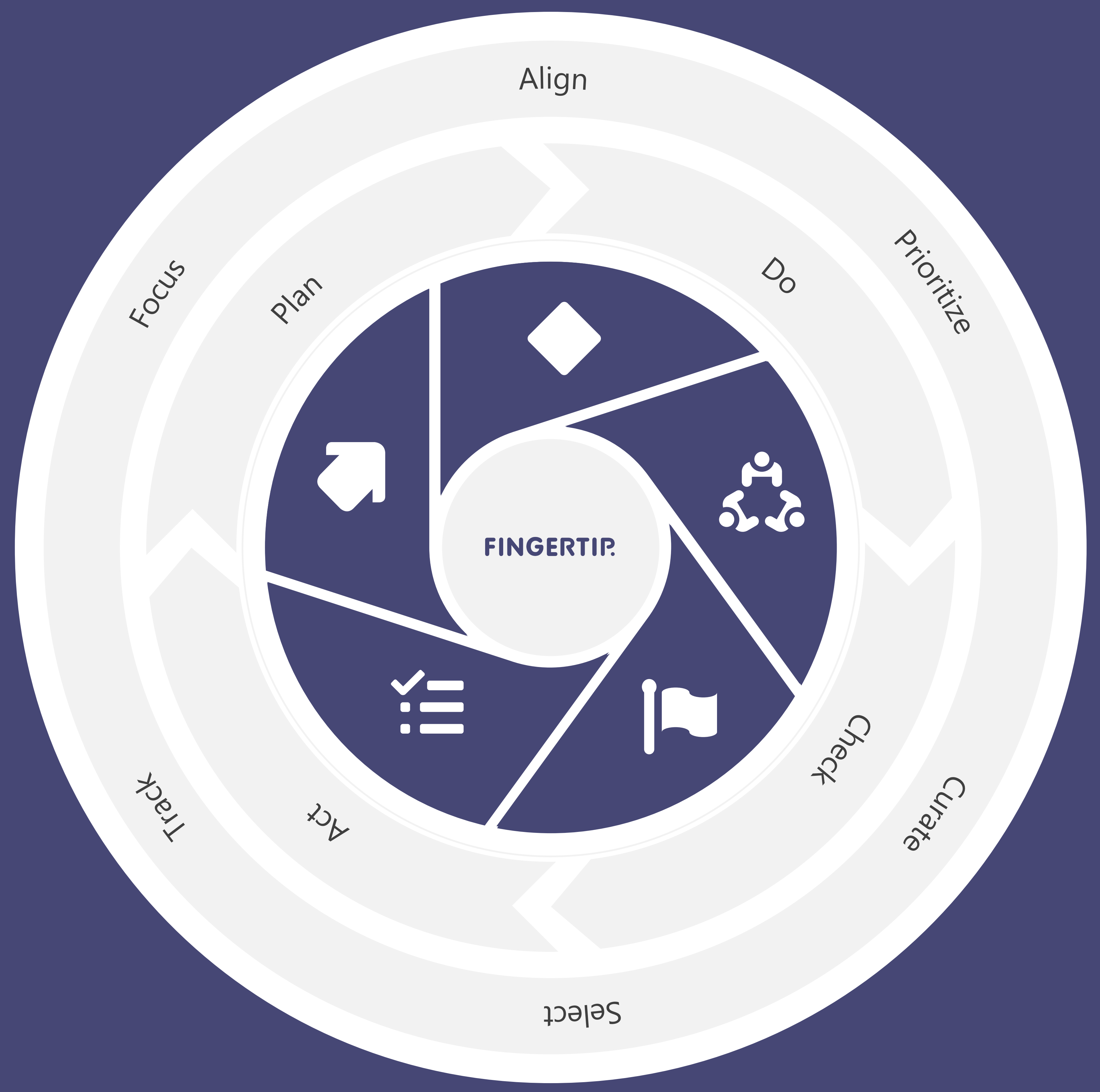
Leader’s Challenges

Most knowledge organizations struggle with long waiting times, while a lot of time is spent documenting and reporting.

Fingertip was designed from the ground up to provide leaders with an easy way to transparently lead entire organizations.

Decide together with great documentation, engage all employees in coordinating knowledge work, goals, and progress, and serve ecosystems using productivity and collaboration tools like no other.

Fingertip’s Flywheel

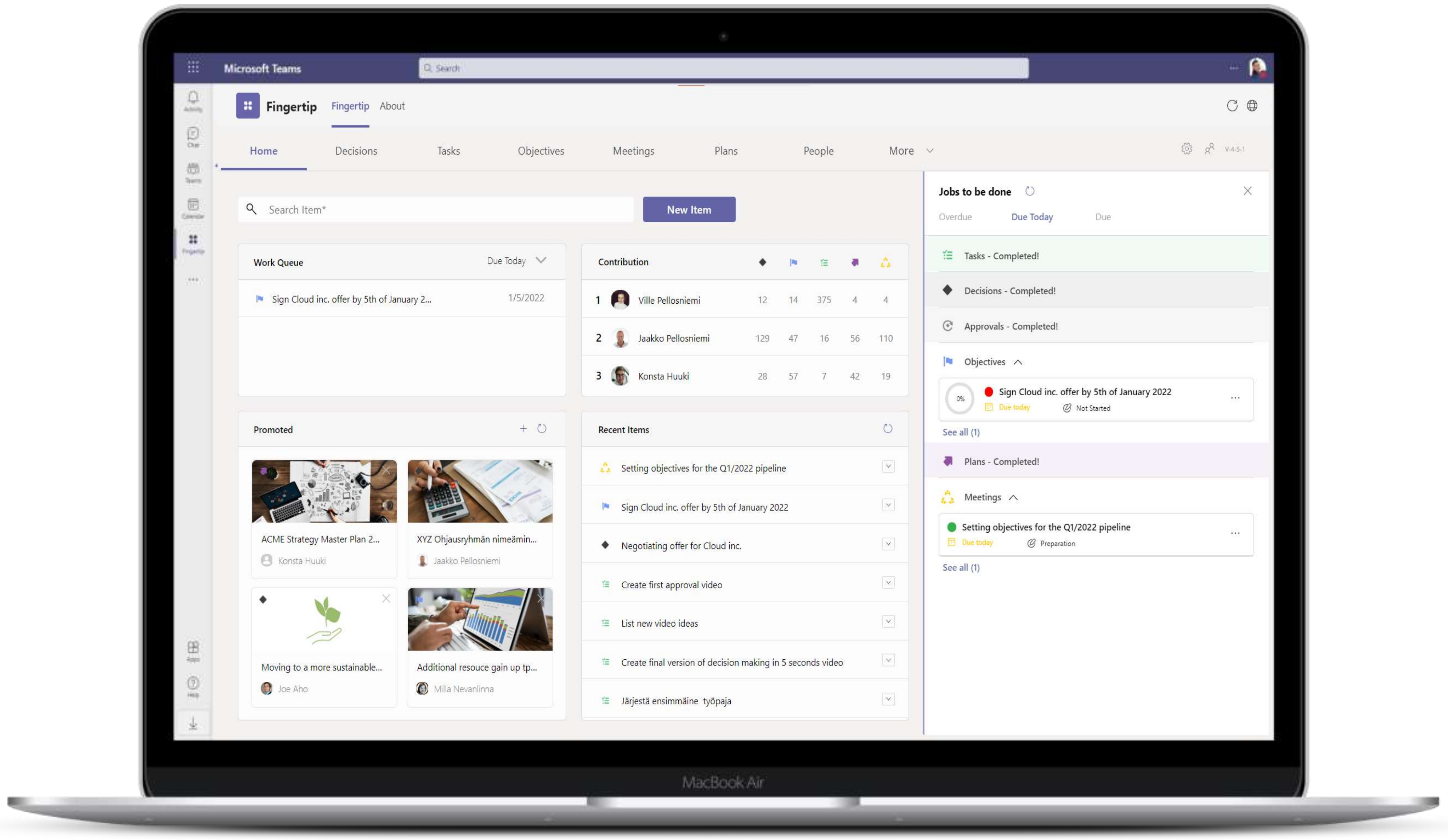


The value creating leadership system.

Proof of Value in leading

Become Efficient

- Faster decision making
- Time to Action reduced
- Time to Re-organization reduced
- Rapidly respond to volatile markets
- Cost of Adoption decreased
- Processes are resilient, compliant and in control
- Remote visibility of productivity
- Empowered organization with collective growth mindset
- Huge amount of data with insightful, analysis being the key differentiator



Earn 1 hour / day

8x Faster Clock Speed

30% Less overall Reporting

22% Cost Savings in decision making

3x Better Quality Decisions

41% Better likelihood to succeed in implementation

FINGERTIP

Fingertip is a pioneer in leadership and work digitization from Finland.

Our mission is to help organizations reach their goals, and make and execute better decisions.

Working and leading anywhere, anytime is more agile, transparent, collaborative and constant.

We tie together leadership with operational decision making, planning, execution, and objective management in an intuitive digital experience.

Fingertip for Microsoft Teams is a brilliant tool for all Microsoft Teams users to more transparent digital leadership.

www

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Get familiar with Fingertip for Teams

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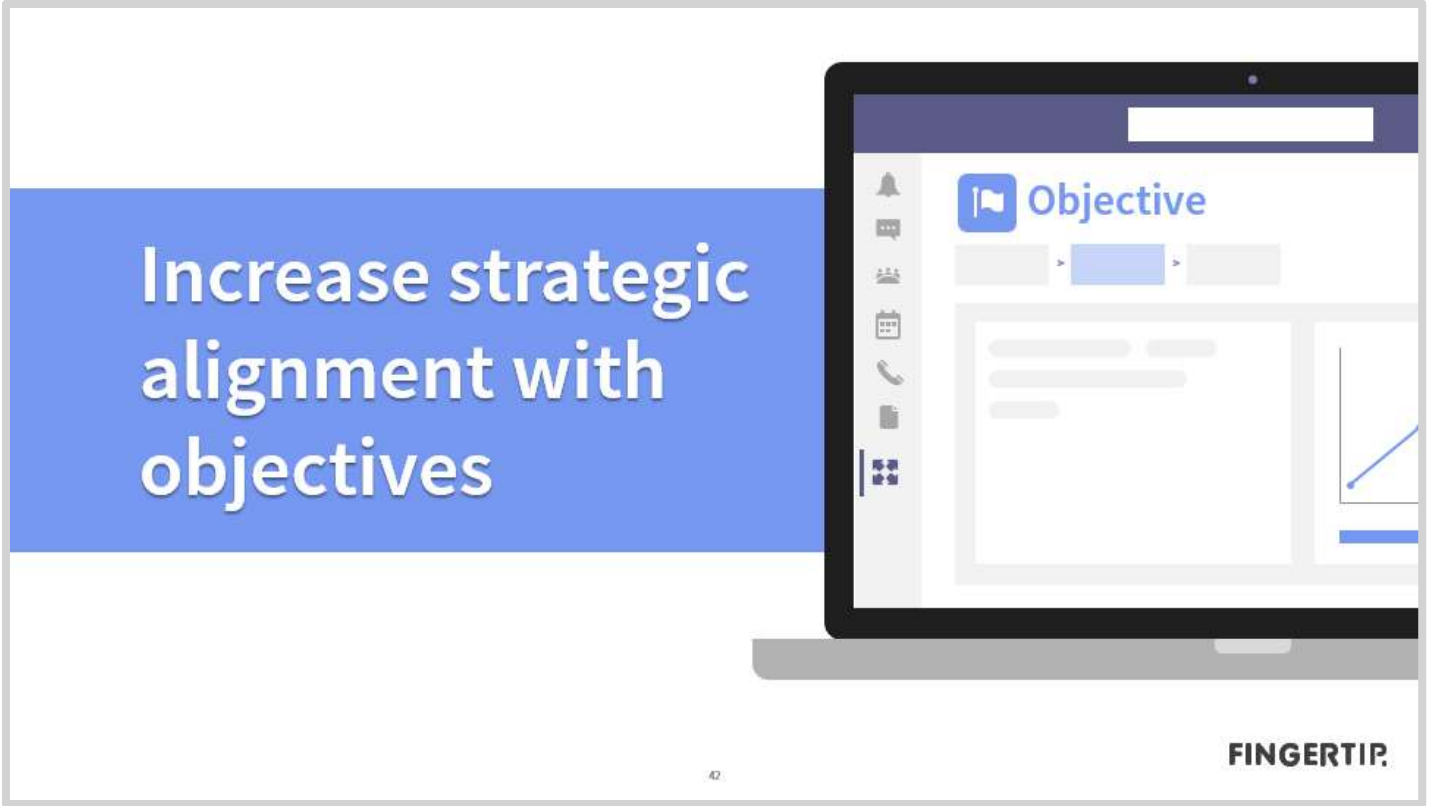
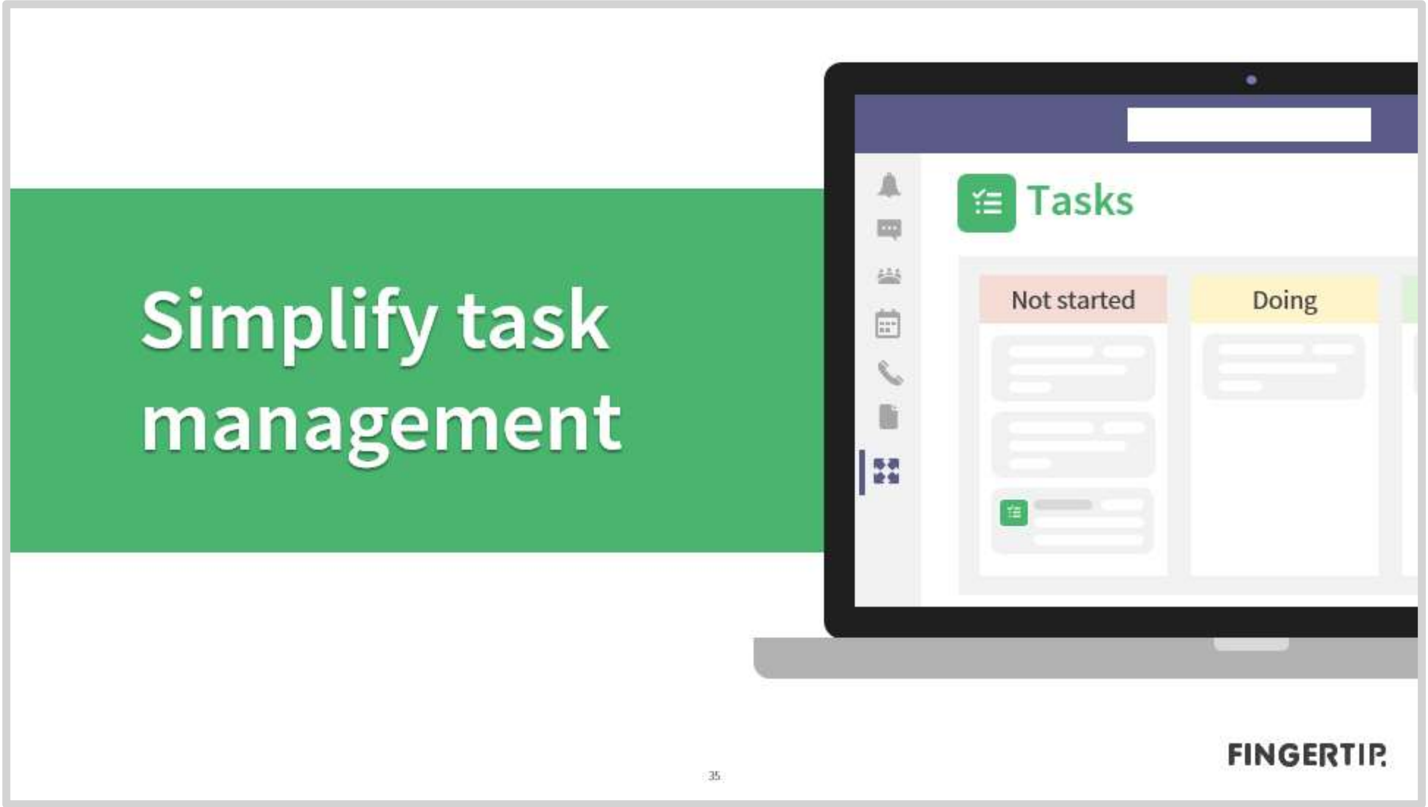
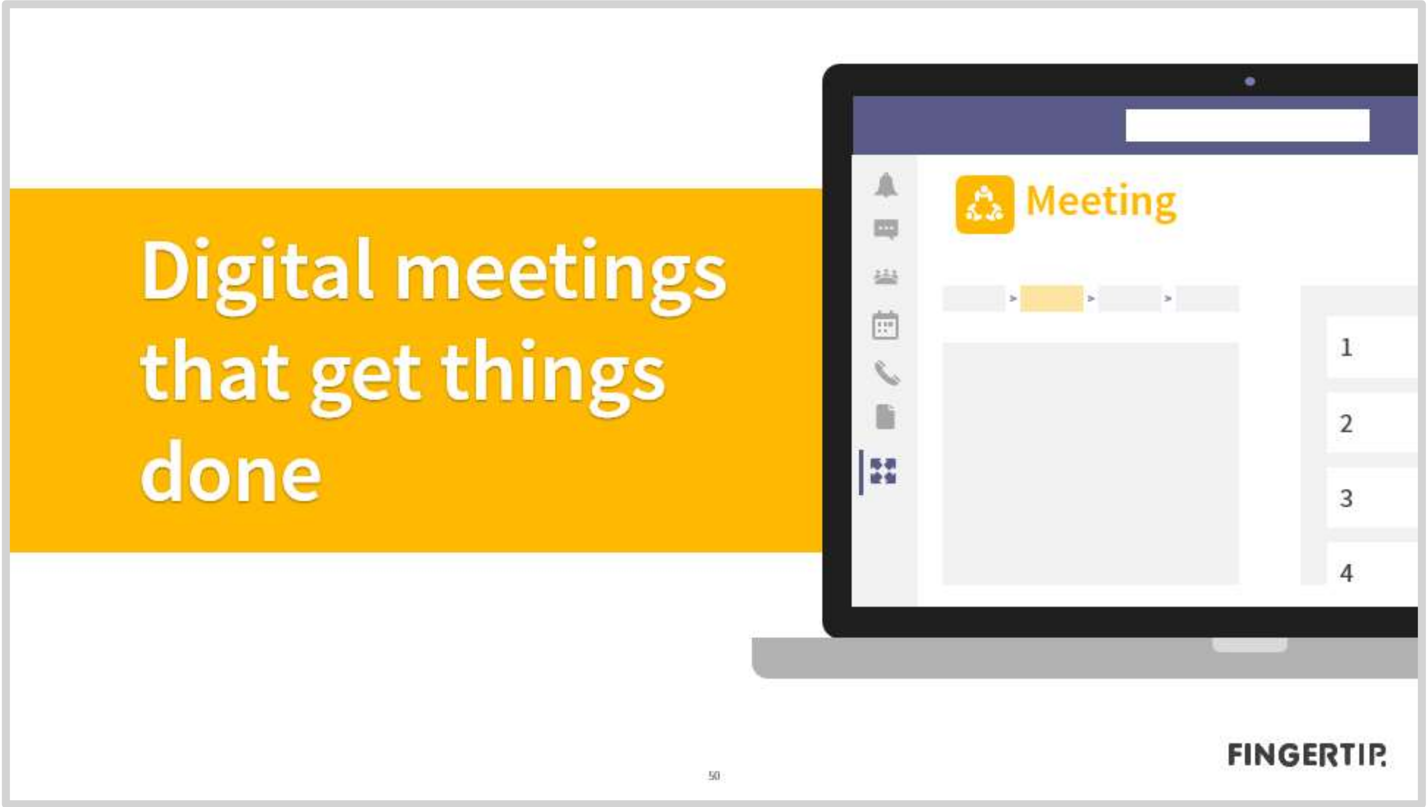
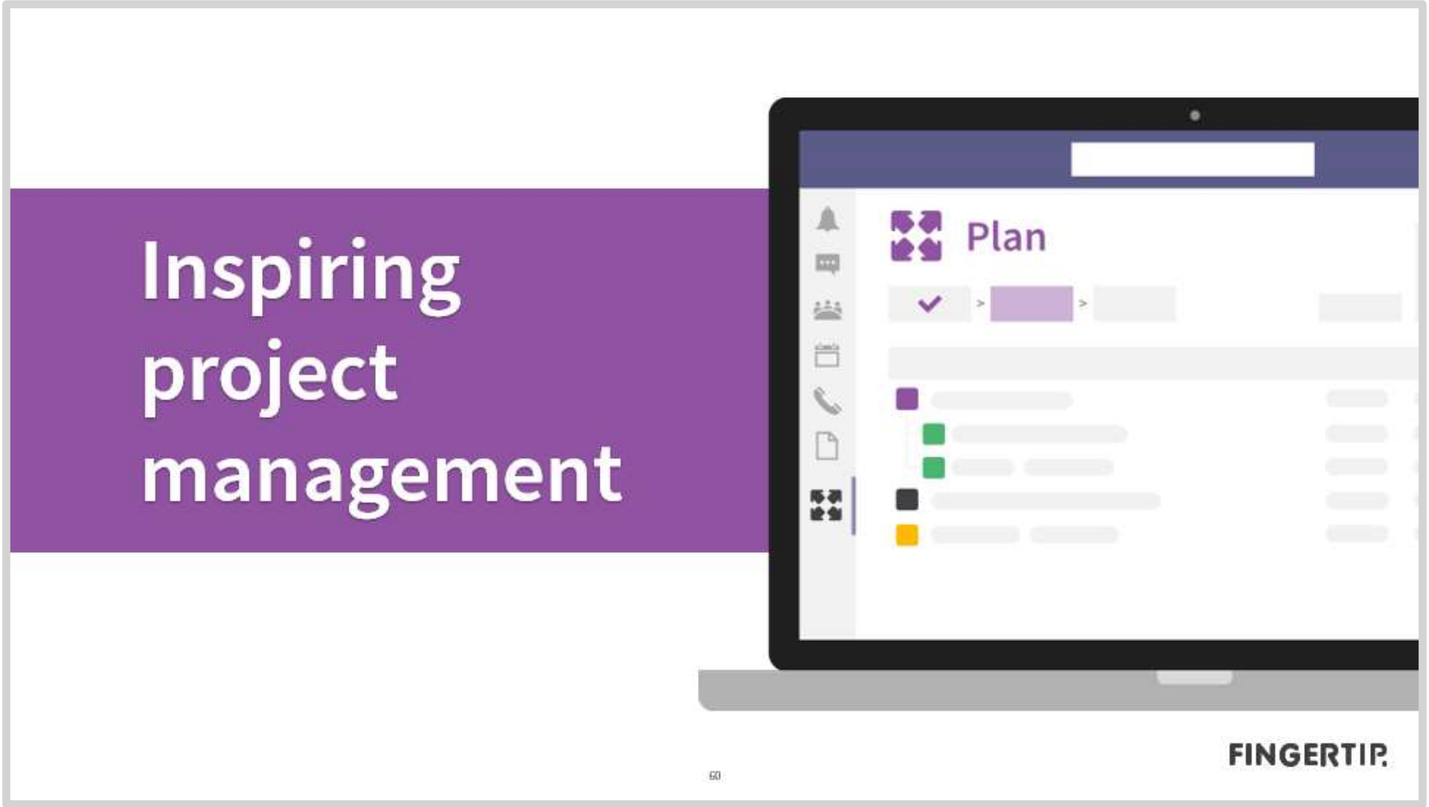
Get familiar with Fingertip objects
Table of Contents









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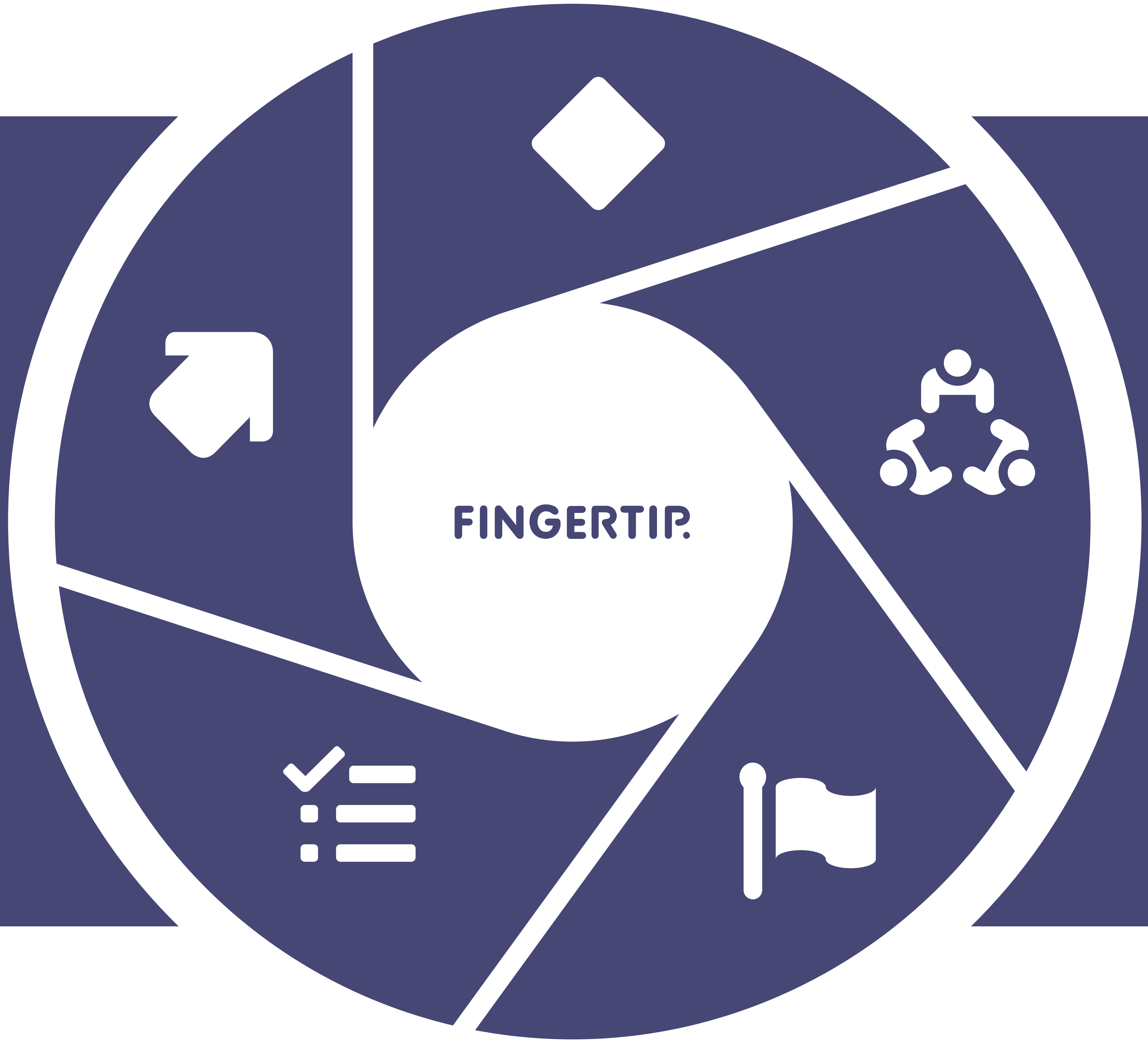
Fingertip
Home



Elements of Home page

Navigation bar
Navigate easily to different functionalities.

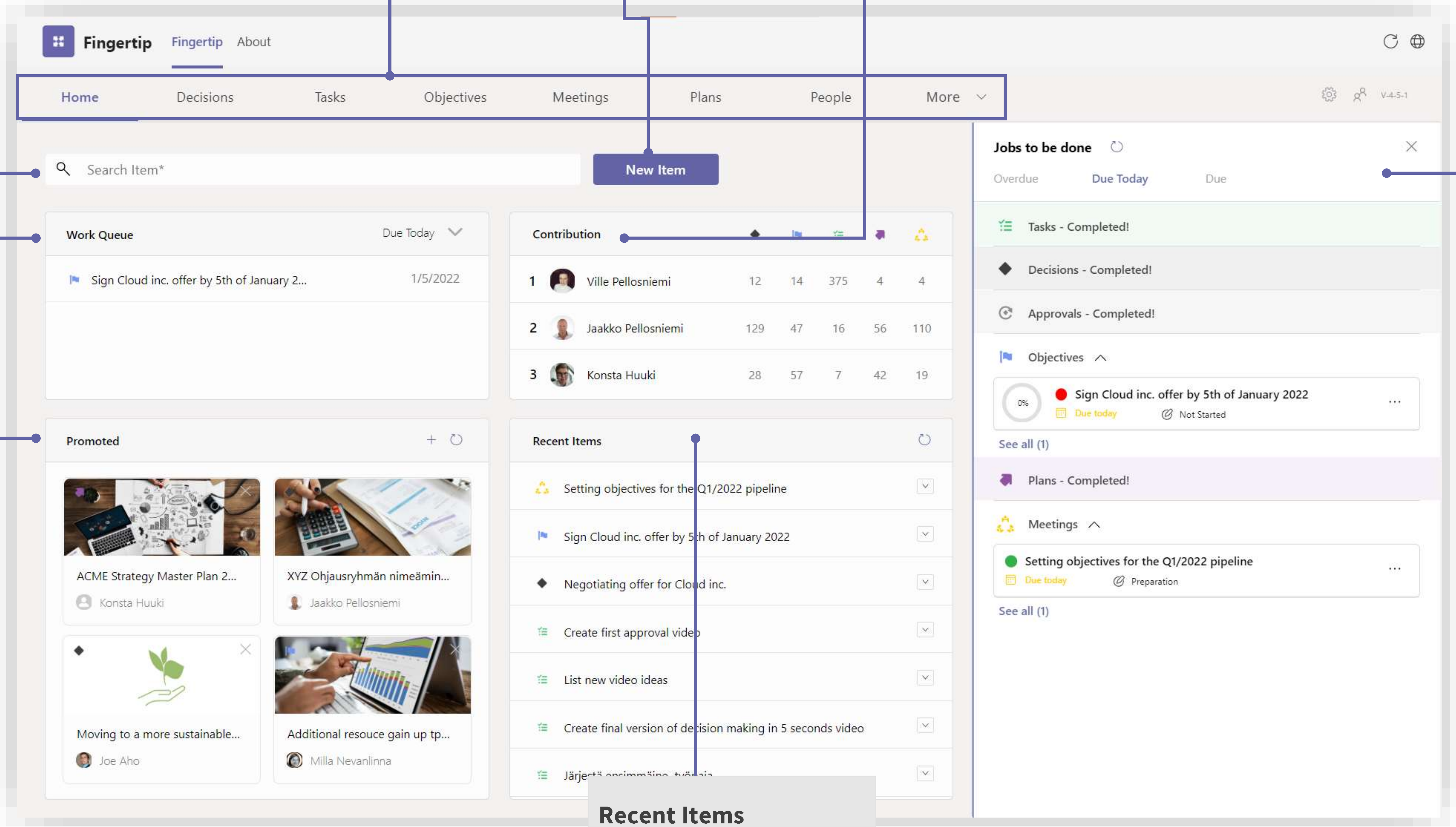
New Item
Quick link to create any new items in Fingertip

Contribution
Leaderboard in object interaction. See who is contributing internally.

Search bar
Search for the records available on the Home page

Work Queue
Work queue gathers together your work based on assigned due dates.

Promoted
Highlight important Decisions, Objectives, Tasks and Meetings you want your organization to see!



Jobs to be done
All your upcoming or overdue work items now shown by categories coming up.

Recent Items
Recently edited Fingertip items.

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Make the right decisions together

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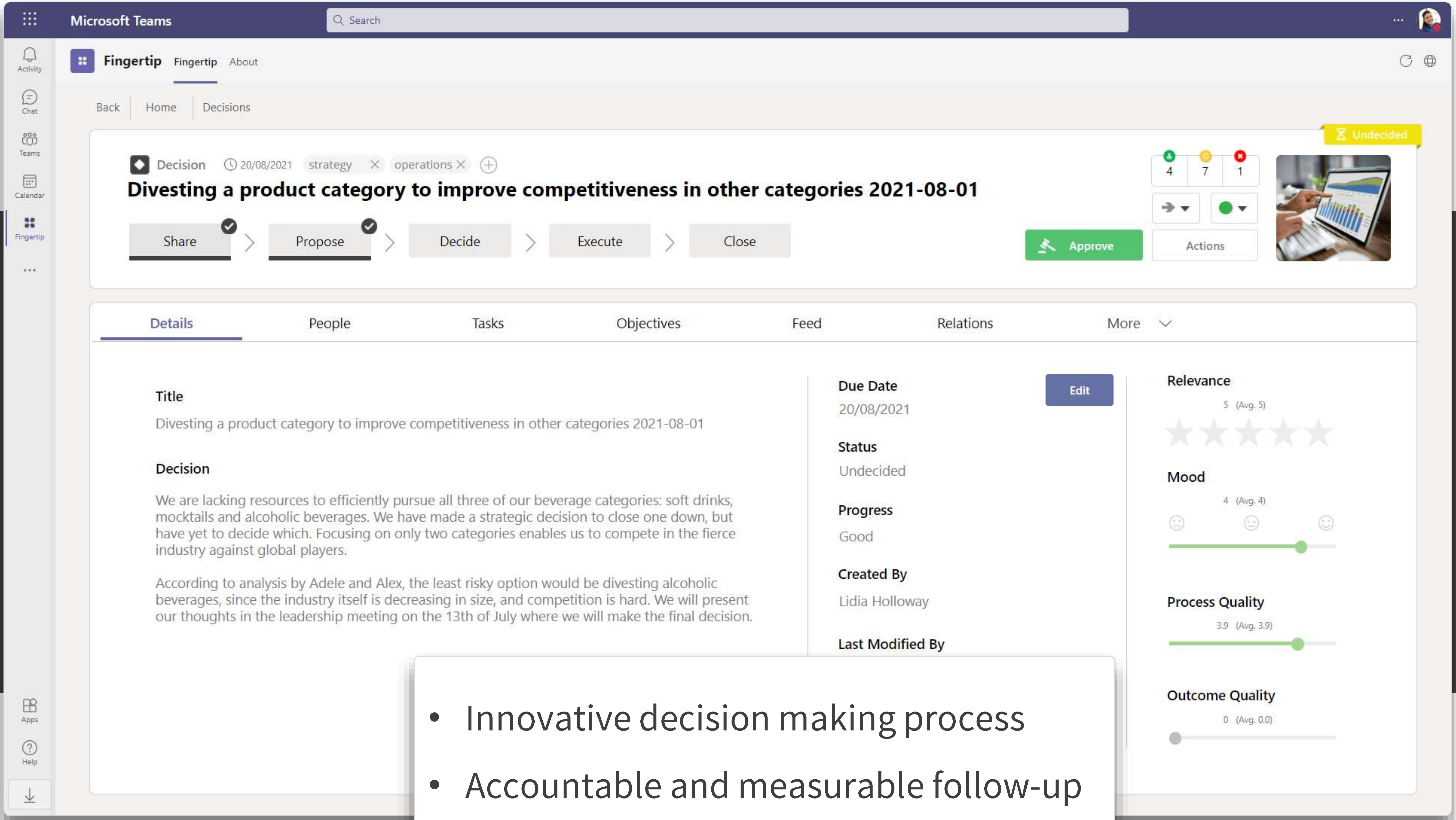
DECISION.

Fingertip gathers all the phases of decision making into one process.

- Write a problem statement, propose, decide and execute
- Use Responsible role to gather the right stakeholders together
- Document, create an audit trail and allow transparency with purpose
- Solve many types of problems flexibly with a documented, agile method.
- Include tasks, files or links to other systems

Make the right decisions together



- Innovative decision making process
- Accountable and measurable follow-up
- Make decisions with higher success

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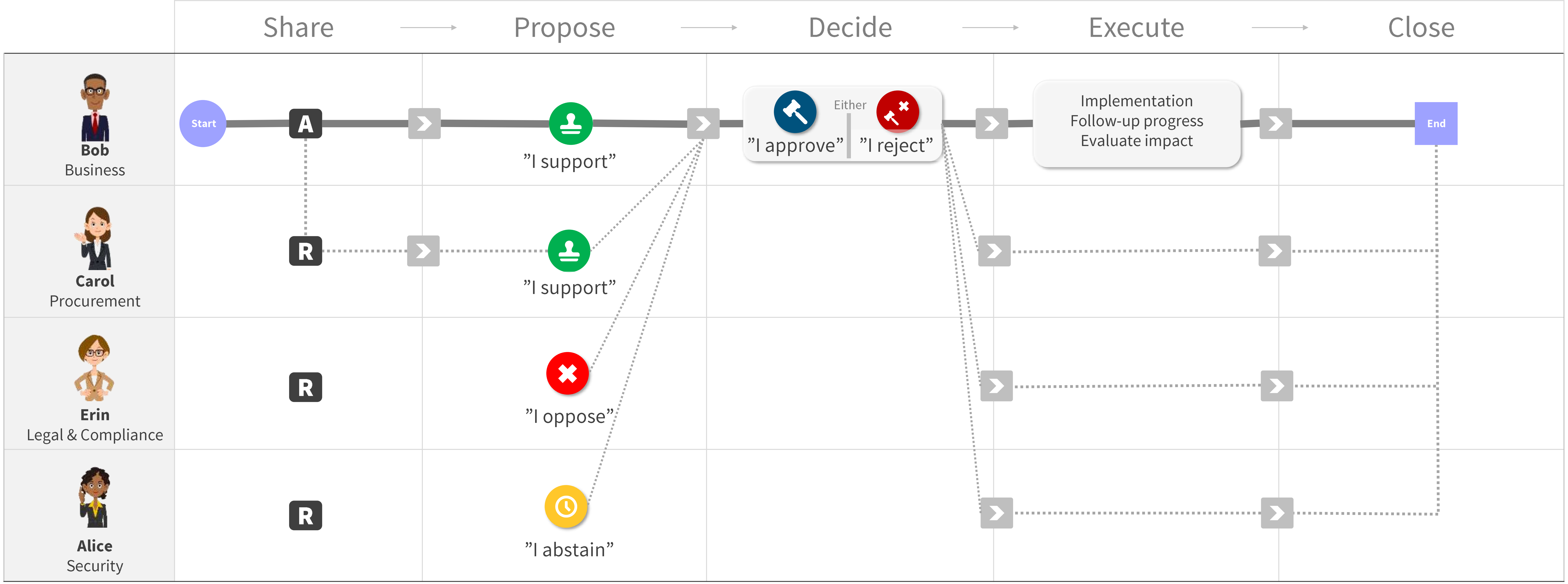
Decision Making Lifecycle



Role Assignment Matrix

A	Accountable	Drives progress and manages expectations. Final Decision approver.
R	Responsible	Key stakeholder in making the decision happen
I	Informed	Informed about the decision

Main route

Alternative route

Move to next phase

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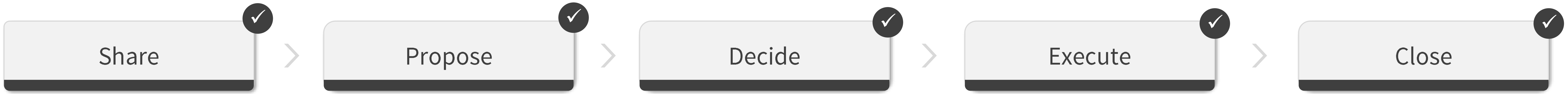
Decision Making lifecycle



- Fingertip’s 5-step decision making life cycle ensures accountable and fast idea-to-execution. It enables leaders to solve problems, escalate issues, and decide on business-critical topics with a clear process.
- The five stages of decision making are:
  - Share
  - Propose
  - Decide
  - Execute
  - Close

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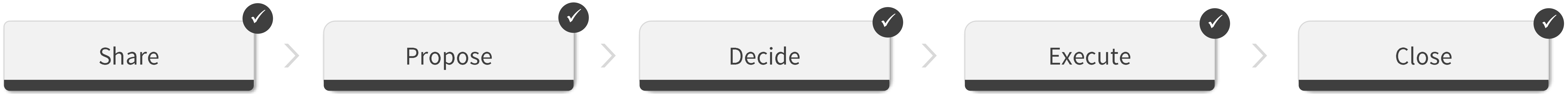
Decision Making lifecycle



- Share
  - In the share phase the person with the mission and motivation, named the accountable, drafts the general background of the decision making situation. They state clearly what is being decided upon and why it is important. At this stage, the people they invite to the decision can see and contribute to the decision proposal. They can also start creating tasks and objectives related to the decision's implementation.
- Propose
  - In the propose phase the accountable tests the validity of their decision proposal with the invited participants. Moving to the propose phase prompts stances from the responsible participants, who can support or oppose the decision, and give their comments as reasoning for their stance (or conditional stance).

Decision Making lifecycle

Share ✓ › Propose ✓ › Decide ✓ › Execute ✓ › Close ✓

- Decide
  - After seeing the stances, the accountable has the power to approve or reject the proposal.
  - **Approving** the decision proposal means we commit to the proposed decision and its implementation.
  - **Rejecting** the decision would mean going “back to the drawing board” in the share phase to reiterate the proposal or closing the decision entirely (it will still stay documented for later reference).

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Decision Making lifecycle

Share › Propose › Decide › Execute › Close

- Execute
  - An approved decision moves to the execute phase, if and when there are tasks to be executed to complete it. You can also report the effects of the decision for example with objectives.
- Close
  - After all is said and done; the tasks are completed, and the decision implementation is done, the decision is “archived” by putting it to the close phase. This way the decision stays available to reference after completion but doesn’t appear in ongoing decision process lists. The accountable also gives their final comments to tell how the process and the outcomes came to be.

Example decision making scenarios

How do we handle adhoc decision making situations as well as decision making over internal silos

Warranty Decision

The customer has most likely not followed product instructions and as consequences the product was damaged. However, to ensure the chance to win the major deal at this customer it would be advisable to offer the customer our warranty.

Participants	3 – 100's
Duration	1 - 3 months
Preparation	2 weeks
Value	★★★★☆ Very high
Difficulty	●●●○○ Complicated

Offer / Credit Decision

After lengthy negotiations, a new account in our system will be opened and the agreed terms of delivery approved.

Participants	10 - 25
Duration	1 - 3 d
Preparation	1 week
Value	★★☆☆☆ Medium
Difficulty	●○○○○ Easy

Investment Decision

After a long study and audit, we make the decision to invest/not to invest and start project implementation.

Participants	~20
Duration	12 months
Preparation	2 months
Value	★★★★☆ Very high
Difficulty	●●●●○ Complex

Special delivery Decision

In order to save customer satisfaction, we have to purchase 20x more expensive air freight for our tractor in Algeria.

Participants	3 - 5
Duration	1 - 3 d
Preparation	2 h
Value	★★★☆☆ High
Difficulty	●○○○○ Simple

Participation in a marketing event

Assemble approvers and payers for a marketing action and follow-up.

Participants	~10
Duration	2 weeks
Preparation	3 months
Value	★★★★☆ Very high
Difficulty	●●○○○ Medium

Resourcing Decision

In the new exit situation, we need a new allocation of current resources and, on the other hand, a rapid updating of competence.

Participants	~10
Duration	1 months
Preparation	1 week
Value	★★★☆☆ Medium
Difficulty	●●●●● Chaotic

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Elements of the Decisions Tab

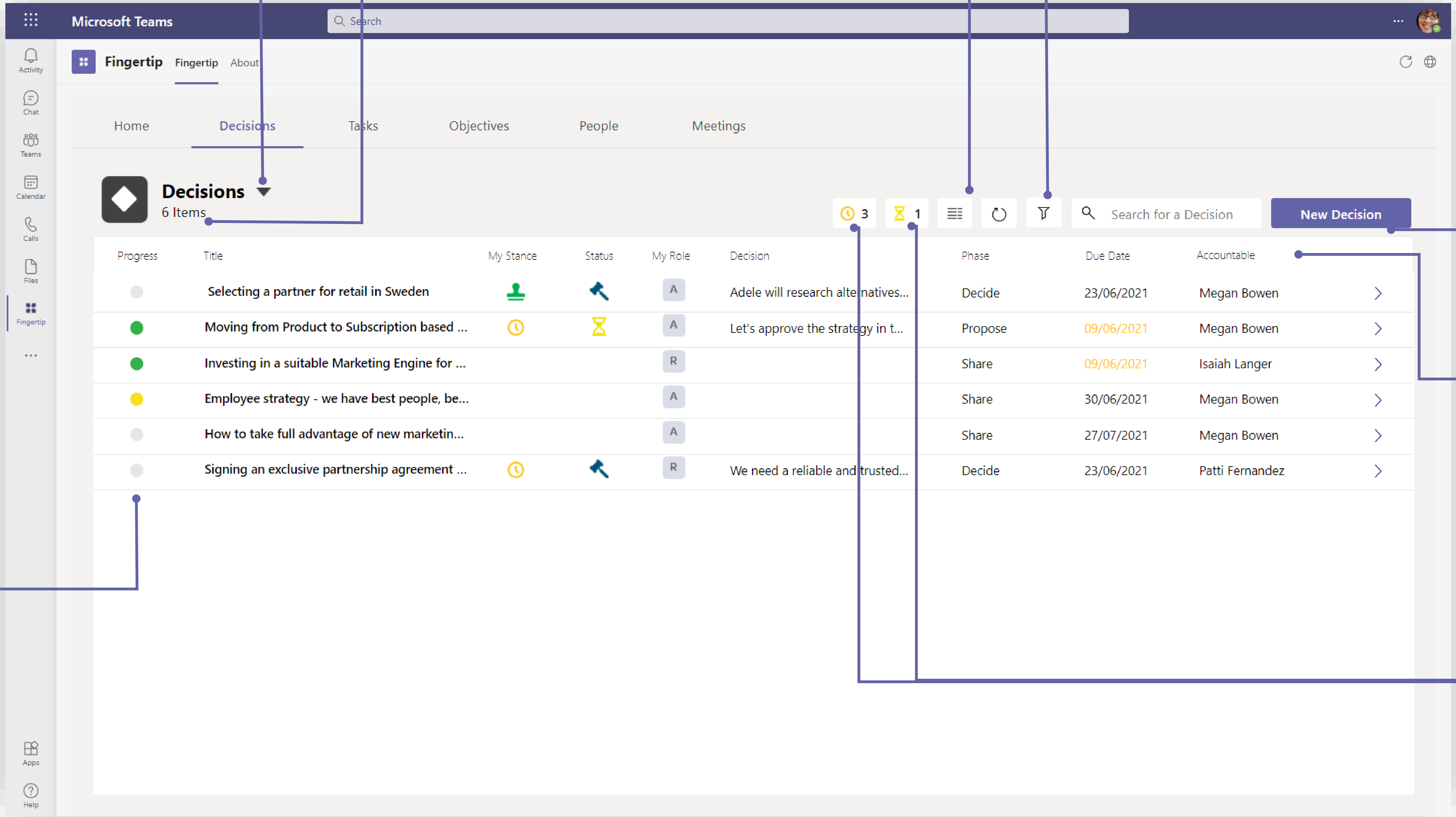
Record Count
Shows total number of Decision records which you part of

Decision Views
Select how to view decisions
1. List
2. Board
3. Insight

Decision log
This page gathers together all the decisions you are part of in a simple and visual list view.

Refresh
Update the Page with the latest records created and data.

Filter
Filters the decisions based on Priority, User, and Status



Create your new decision by entering all required details and share among people for approval

Accountable
The person Accountable for the decision.

Visual indicators

- Traffic lights for progress
- Stance shows your stance in the decision
- Status of the decision
- Your Role in the decision

Pending Approvals
Shows the number of decisions pending to be approved by you. Press to see the list.

Pending Stance
Shows the number of decisions waiting for your stance. Press to see the list.

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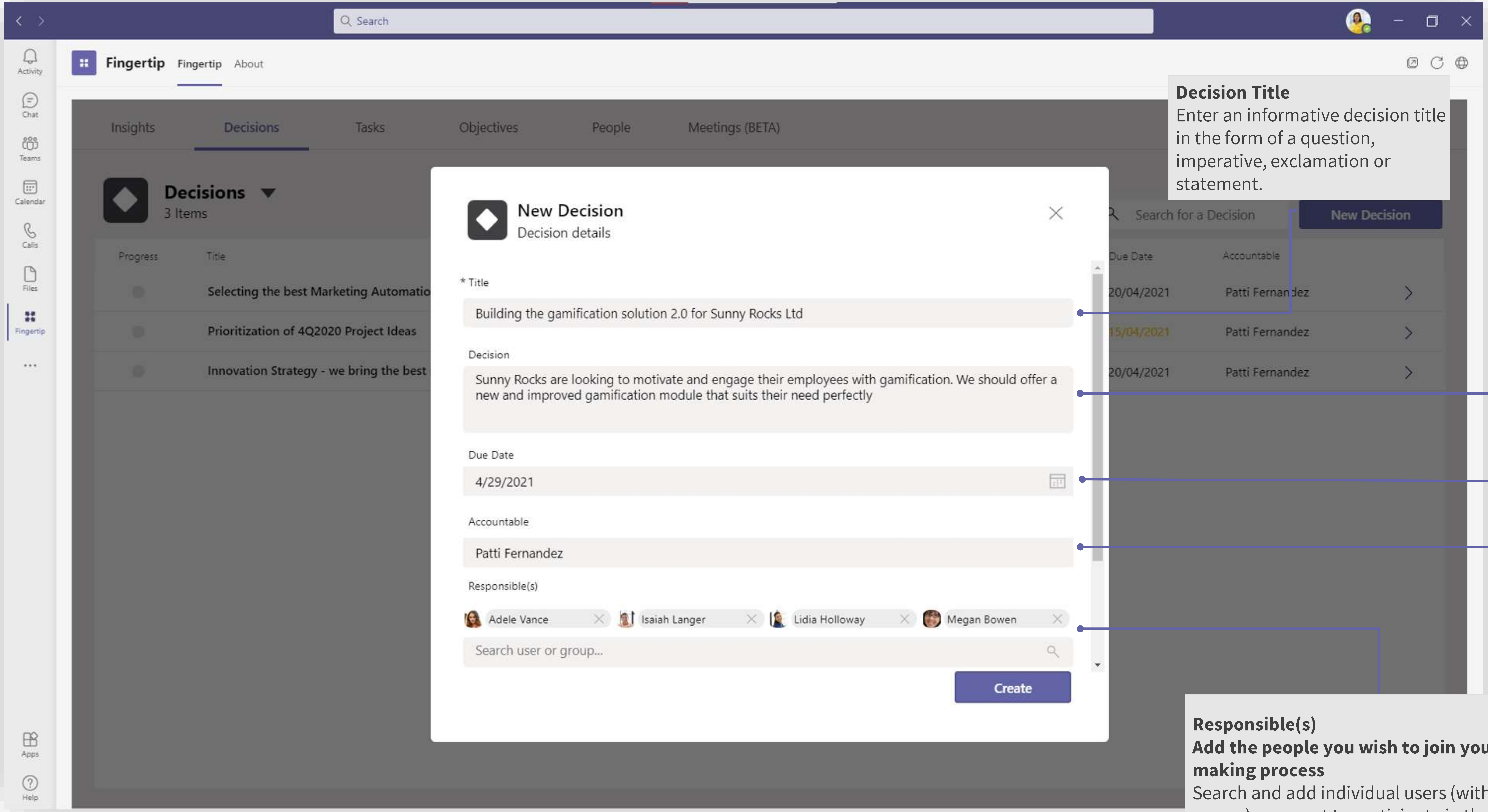
New Decision popup



Decision Title
Enter an informative decision title in the form of a question, imperative, exclamation or statement.

Decision
Here you will document the decision proposal and final decision once it is time for it

When should the decision be decided upon?
Add the due date/ deadline for the collaboration and stances.

Accountable
Stakeholders of the decision
Accountable field will by default set the user to login user.

Responsible(s)
Add the people you wish to join you in the making process
Search and add individual users (with Fingertip access) you want to participate in the decision. This list determines who can access the decision and give their insights on the decision.

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The Decision record page insights

Process Phase
We've created and shared the decision with everyone. Exciting! They will be notified that there's a new decision in town. When we are happy with our decision proposal, we can share it and ask for opinions!

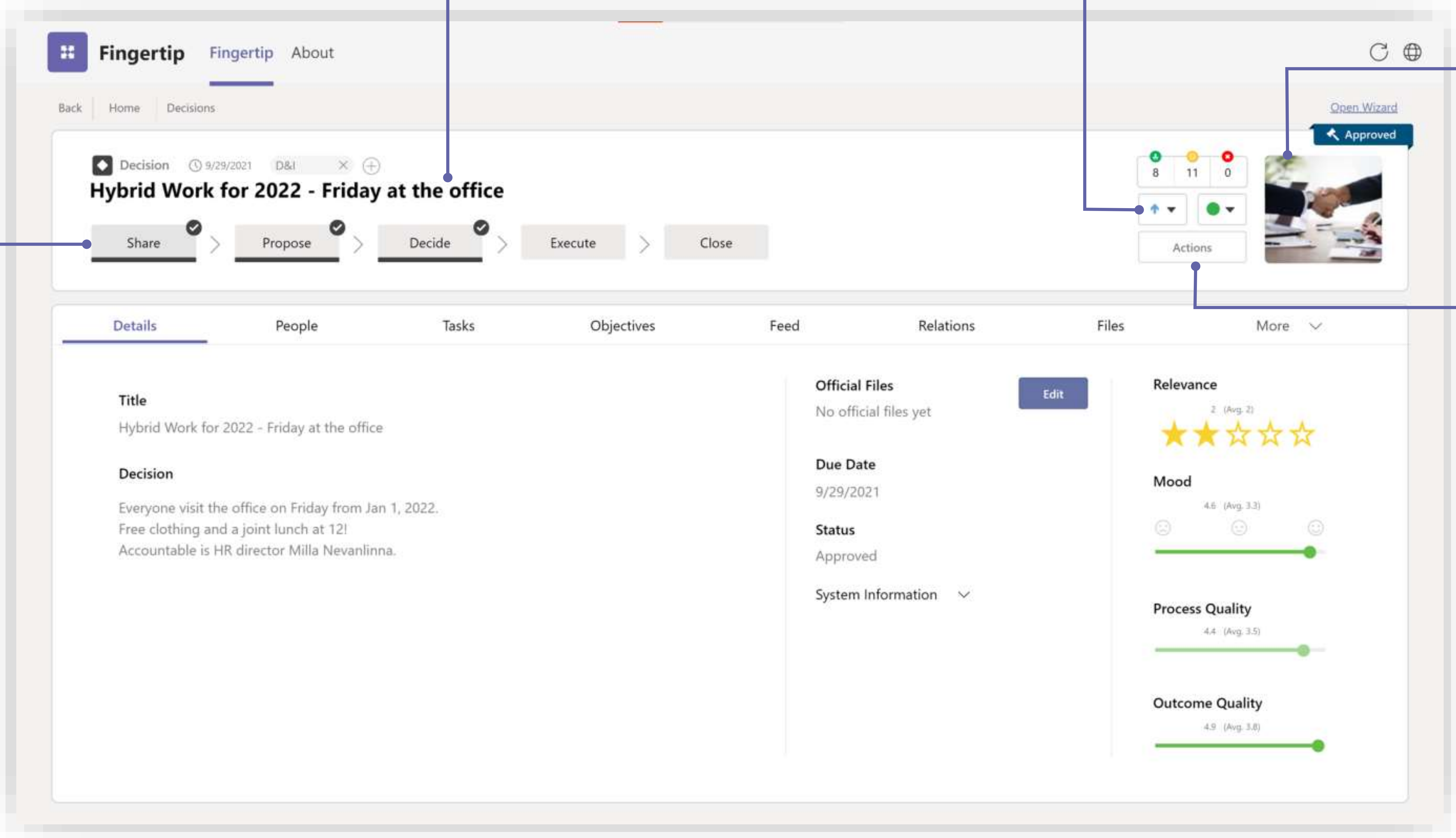
Share: Involve stakeholders & collaborate.
Propose: Gather the Stances
Decide: Make the decision. Decide!
Execute: Complete the required tasks
Close: Close when your decision has been successfully executed

Decision title
Inspiring summary and crystallization of the decision

Trend and Progress indicator
Allows you to set the severity/importance and progress status of a decision

Decision decoration image
When you click on it a popup will open where you can select the image and upload a decoration image to a decision

Manage decision
Action menu provides list of option such as New task, New Objective, Add people etc. for the ease of creating records inside decisions



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Accountability Assignment Matrix (AAM)

Use this framework to make effective and efficient group decisions.
Agreeing on Roles and Responsibilities in every decision - Everyone knows what's expected.

Icon	Role	Move to next Phase	Read	Edit	Chat	Stance	Final Decision Approval
Only ONE A	**Accountable** This Person will drive the team to a decision, makes the final decision, and is ultimately accountable for it.	✓	✓	✓	✓	I support I oppose I abstain	I approve I oppose
R	**Responsible** These People do the work, and they have the capability to drive the DM process forward.	✓ Without final approval	✓	✓	✓	I support I oppose I abstain	-
I	**Informed *** The people kept informed of progress and with whom there is one-way communication. These are people that are affected by the outcome of the decision, so need to be kept up-to-date.	-	✓	-	-	-	-

*) The "Informed" role is planned for H2 2021

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Iconography for Decision Making

Decision Making Process

Share › Propose › Decide › Execute › Close

Status of decision

Share	Propose	Decide	Execute	Close
Decision	Decision	Decision	Decision	Decision
Undecided Pending	Undecided Pending	Approved / Rejected	Approved / Rejected	Approved / Rejected / Undecided

Stakeholder actions in decision making

Stances (A, R)

- "I support"
- "I oppose"
- "I abstain"

Approval (A)

- "I approve"
- "I reject"

Role Assignment Matrix

A	Accountable	Drives progress and manages expectations. Final Decision approver.
R	Responsible	Key stakeholder in making the decision happen
I	Informed *)	Informed about the decision

*) The "Informed" role is planned for H2 2021

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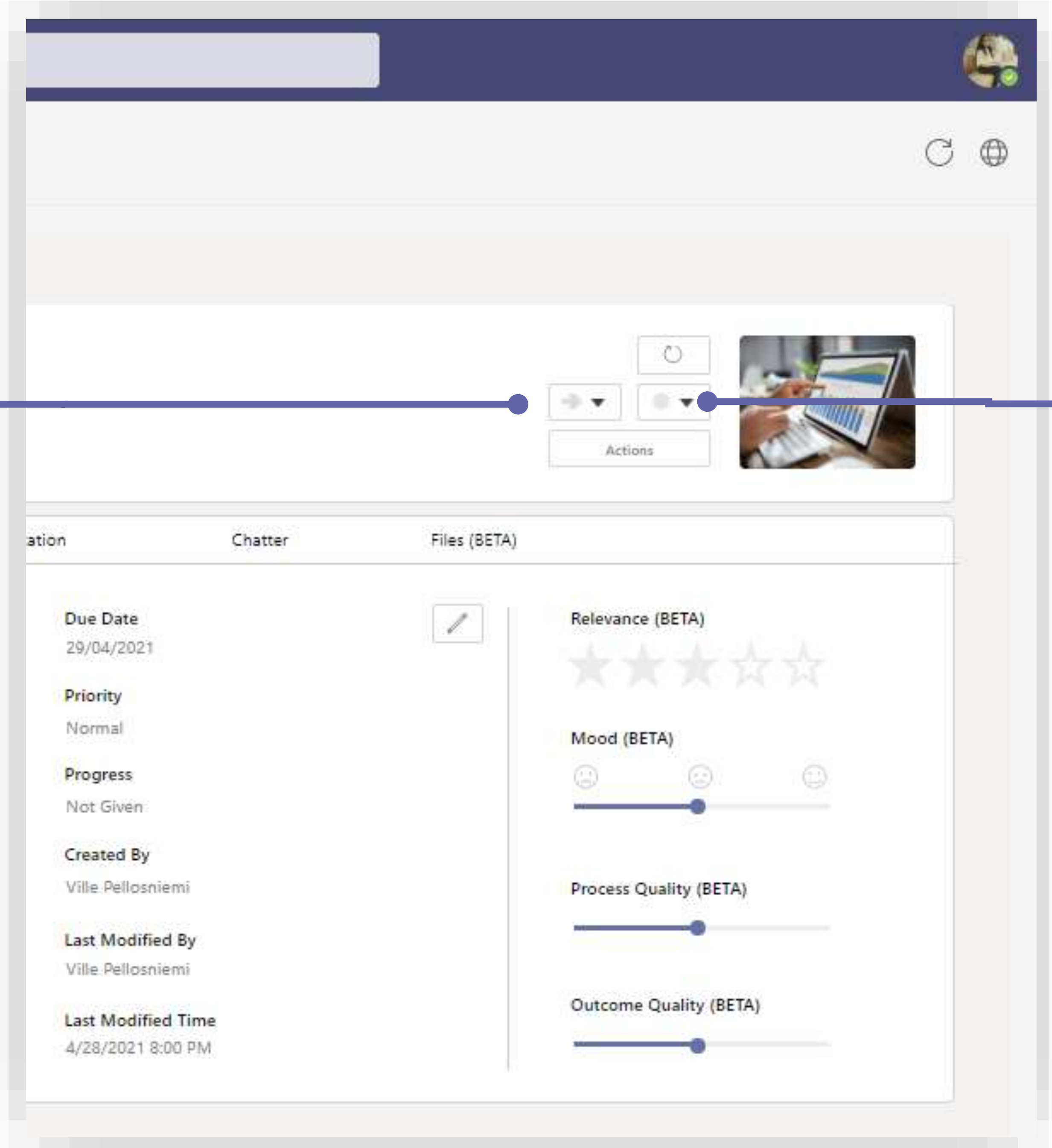
The concept of status indicators in Fingertip

Trend indicator

Trend indicator visualizes the current direction of progress in a business object. Is it thriving, steady or stagnating? - visualized in an intuitive way.



Progress indicator “Traffic Lights”

- Not Given

Current states:
- Good
- Minor Challenges
- Critical

End states:
- Completed
- Completed with Problems

Traffic lights in Fingertip show the current progress status of your business objects. Indicate challenges in the progress and see how others are doing reaching out to help if need be.

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Approval – a special case for quick decision making

- Sometimes all we need to commit for a decision is a small push. The encouraging words of a single team member, or the green light from our supervisor. For those situations, Fingertip offers the Approval item.
- The approval item’s lifecycle consists of only two phases:
  - Requested – The accountable sends their proposal to the approvers to evaluate, propose changes, and to get their stance: support or oppose.
  - Approved/Rejected – After processing the stances, Fingertip automatically sets the phase to either approved or rejected depending on the answers.

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Approval type

- Approval type stated the logic by which the proposal will be approved. Fingertip includes currently three approval types:

- **Everyone must approve** – The proposal will be approved once all approvers have given a supporting stance. One opposing stance will decline the approval.
- **First to approve** – The proposal is approved once any approver gives a supporting stance. Use for green light -approvals
- **Depending on the response** – The requestor holds the authority for the final approval to themselves, making the final decision after getting input from approvers

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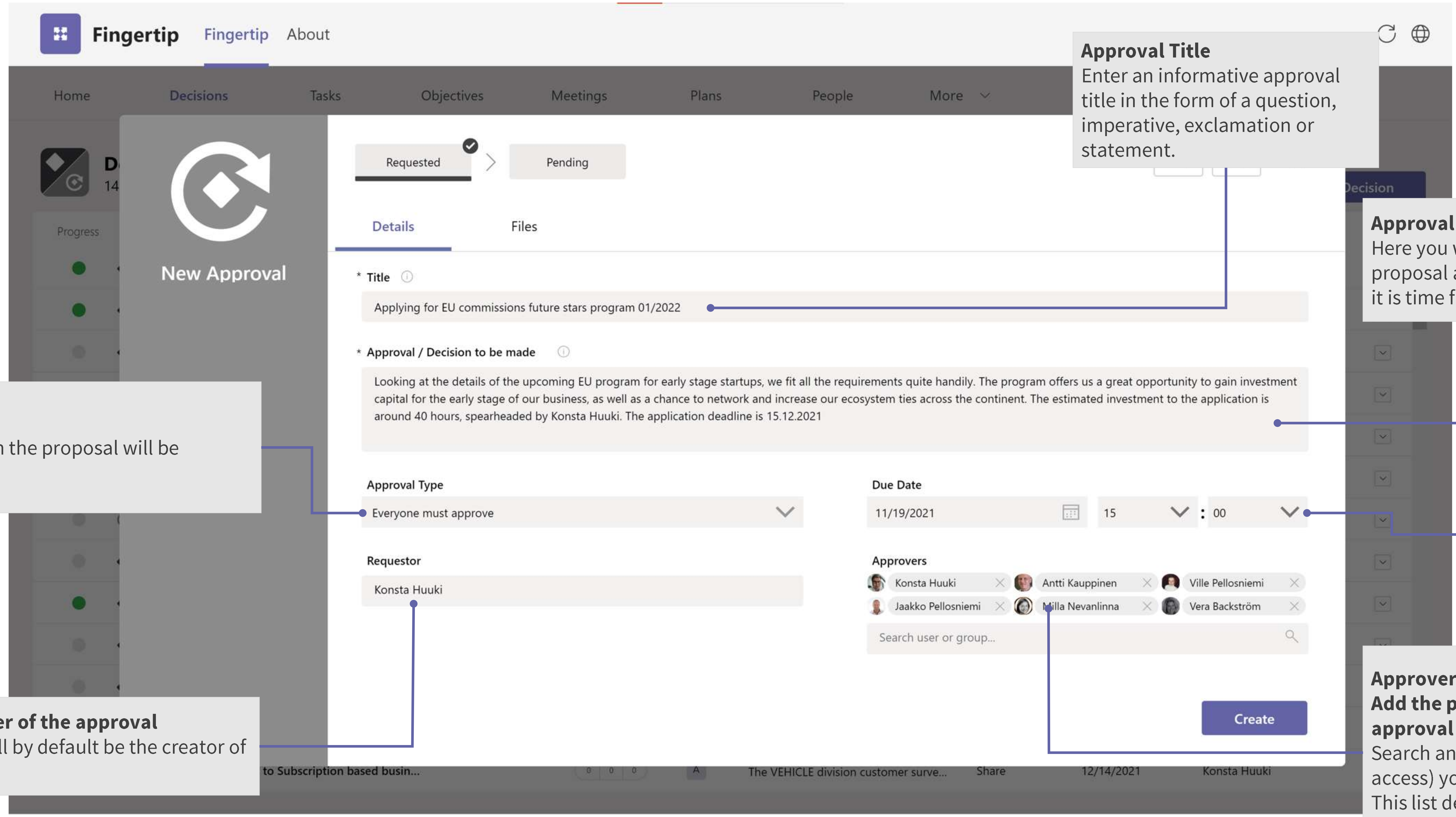
New Approval popup



Approval Title
Enter an informative approval title in the form of a question, imperative, exclamation or statement.

Approval
Here you will document the proposal and final approval once it is time for it

Approval type
The logic by which the proposal will be approved.

Due date
Add the due date/ deadline for the collaboration and stances.

Requestor - Owner of the approval
Requestor field will by default be the creator of the approval

Approver(s)
Add the people you wish to join you in the approval
Search and add individual users (with Fingertip access) you want to participate in the approval. This list determines who can access the approval and give their insights

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The Approval record page insights

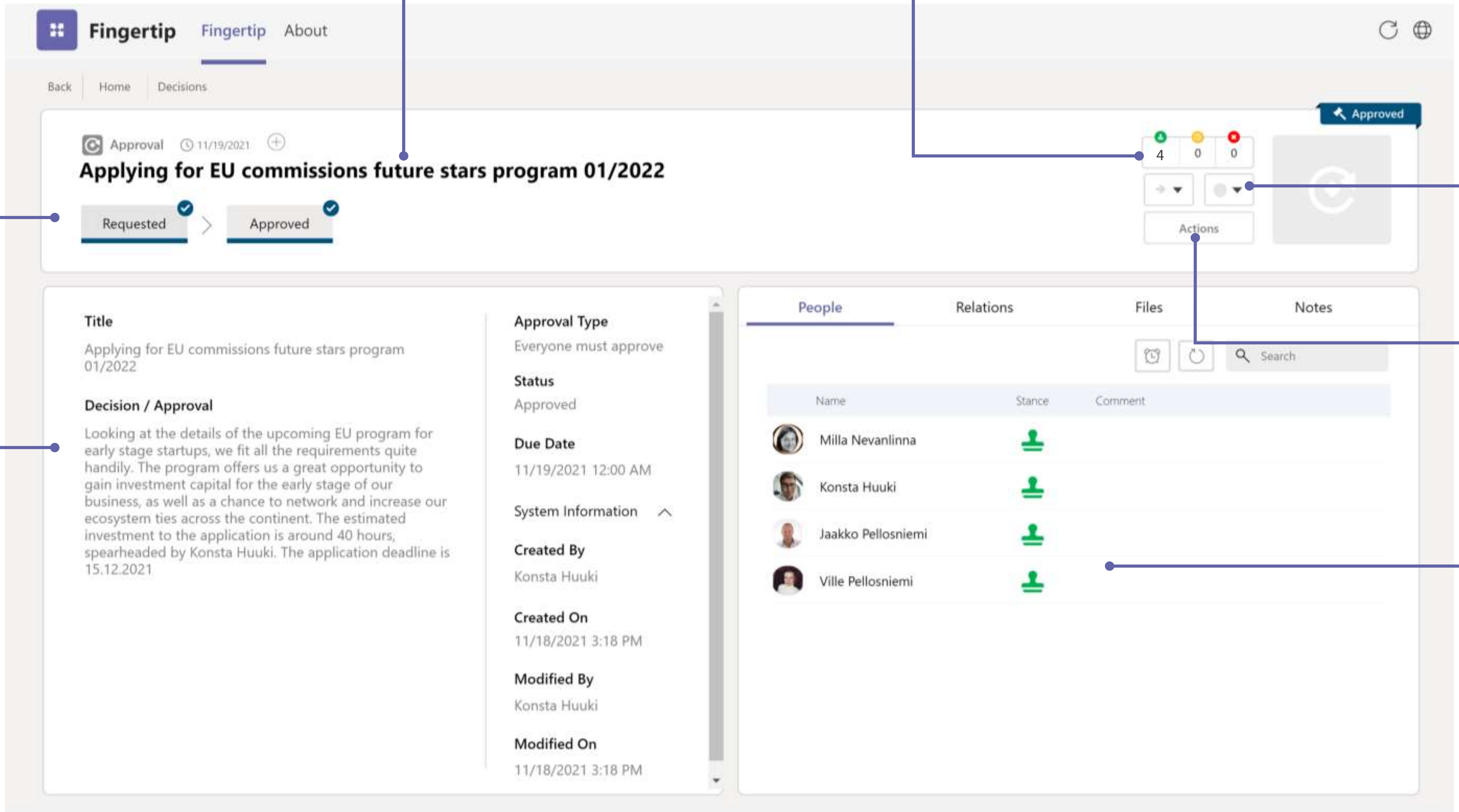
Approval title
Inspiring summary and crystallization of the approval

Approval stances
Number of supporting, opposing and abstaining participants

Trend and Progress indicator
Allows you to set the severity/importance and progress status of the approval

Approval phase
Tells you the life cycle stage of the approval

Approval details
More in-depth specification related to the approval



Manage approval
Action menu provides list of option such as add relations, export or delete approval

People and stances
View the given stances of the people in the approval

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Step-by-step guides [DECISIONS]

How to create a decision

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How to propose a decision

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How to give a stance to a decision

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How to approve a decision

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How to create an approval

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How to manage tasks in a decision

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How to manage objectives in a decision

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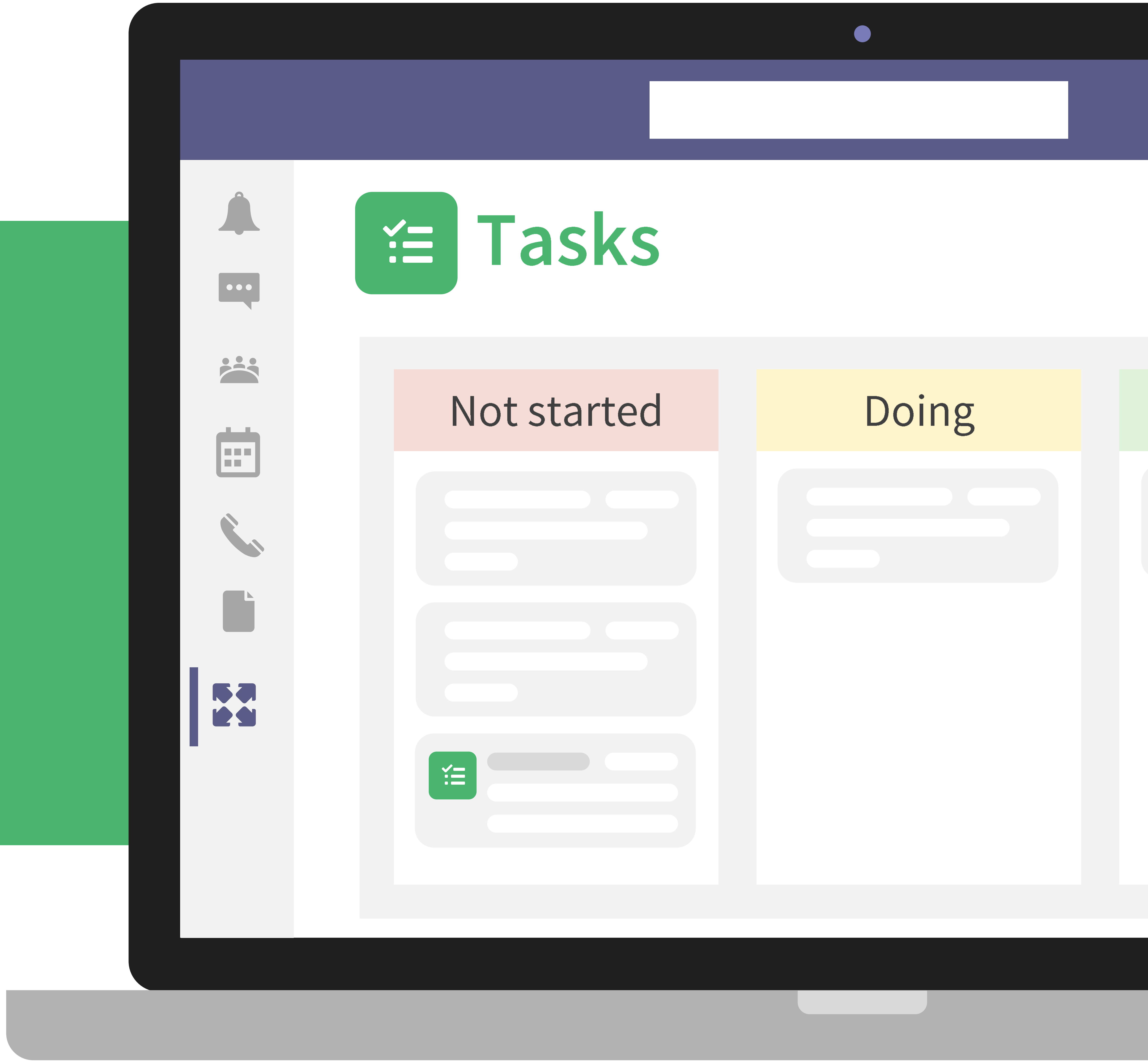
Simplify task management



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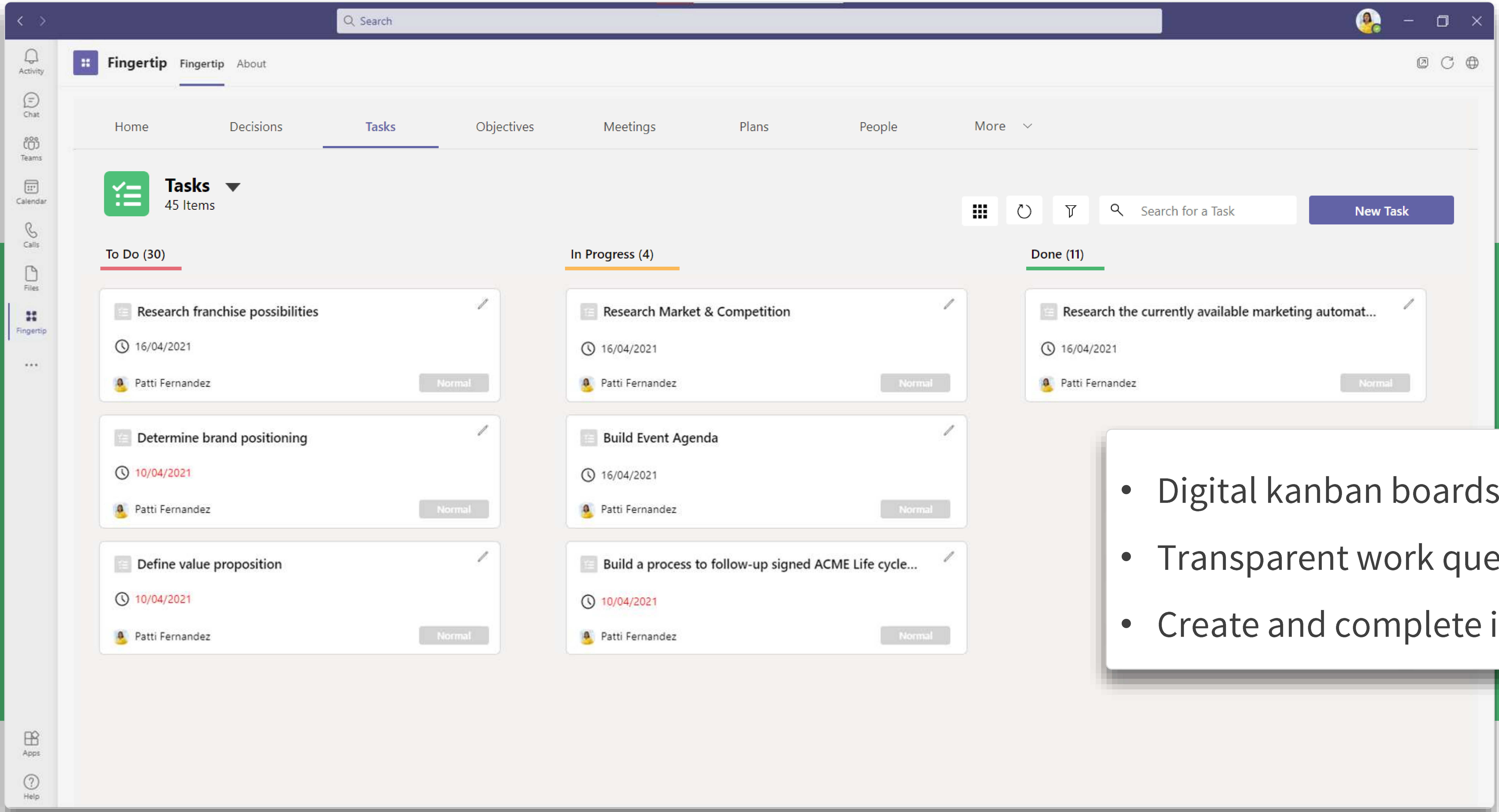
TASK.

Something that needs to be done

- Assign tasks to yourself or to other users
- Set a due date and follow the execution
- Communicate the status with others with task stages
- Display your tasks on a list or a Kanban board
- Prioritize the most critical tasks

Task management focusing on doing



- Digital kanban boards
- Transparent work queues
- Create and complete in seconds

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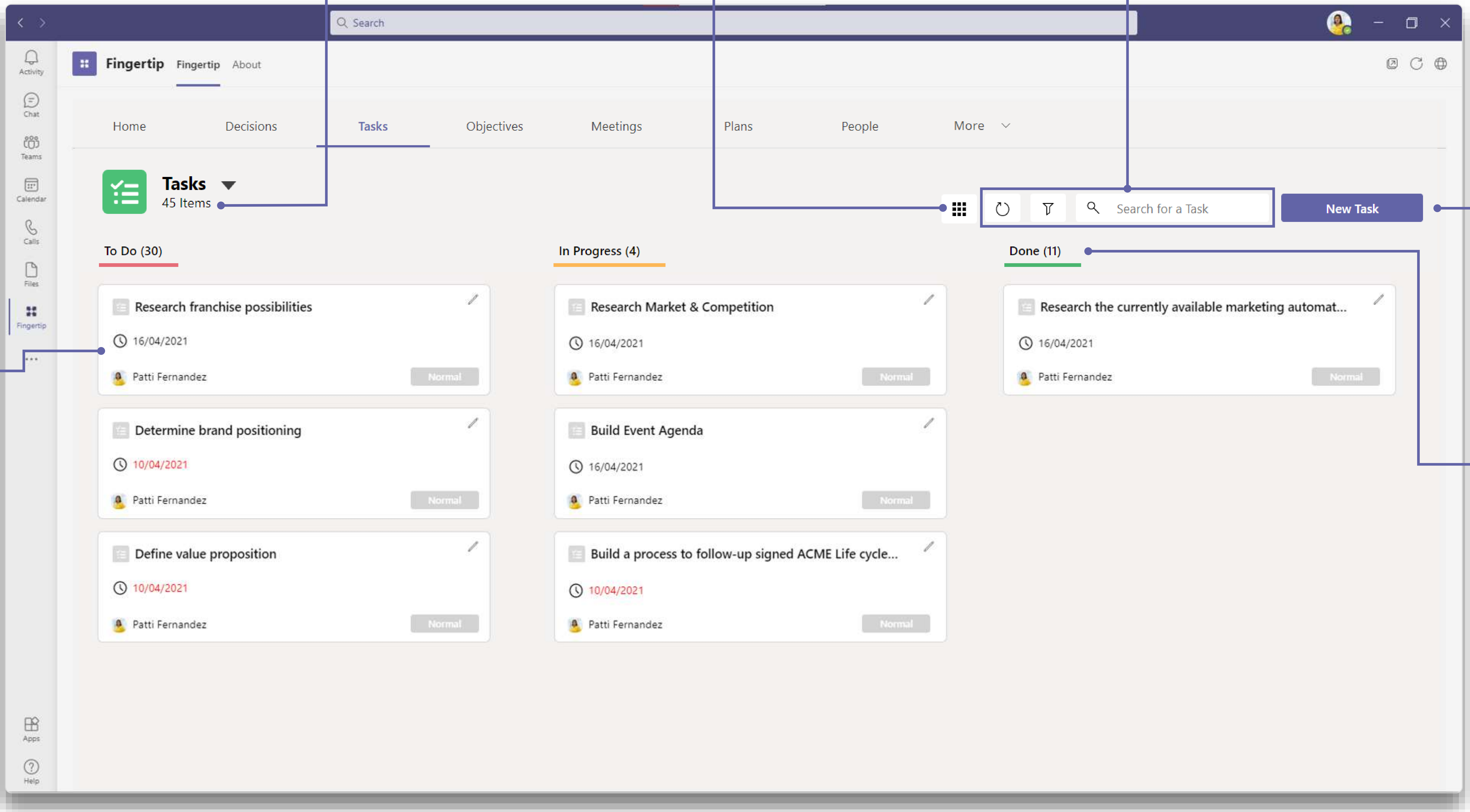
Elements of the Tasks tab

Total amount of Tasks
This field shows total number of Tasks you own

View the task in different layouts
Select between the different views the task tab to be viewed:
1. Kanban
2. List

Refresh, filter and search
Refresh the list for changes, filter by pre-determined information or search by title

Task cards
Display the most important task information (title, due date, owner and prioriry)



Create task
New Task button let's you create new Task

Task Kanban
Shows the tasks you own and their status. Most recently changed appear on top.

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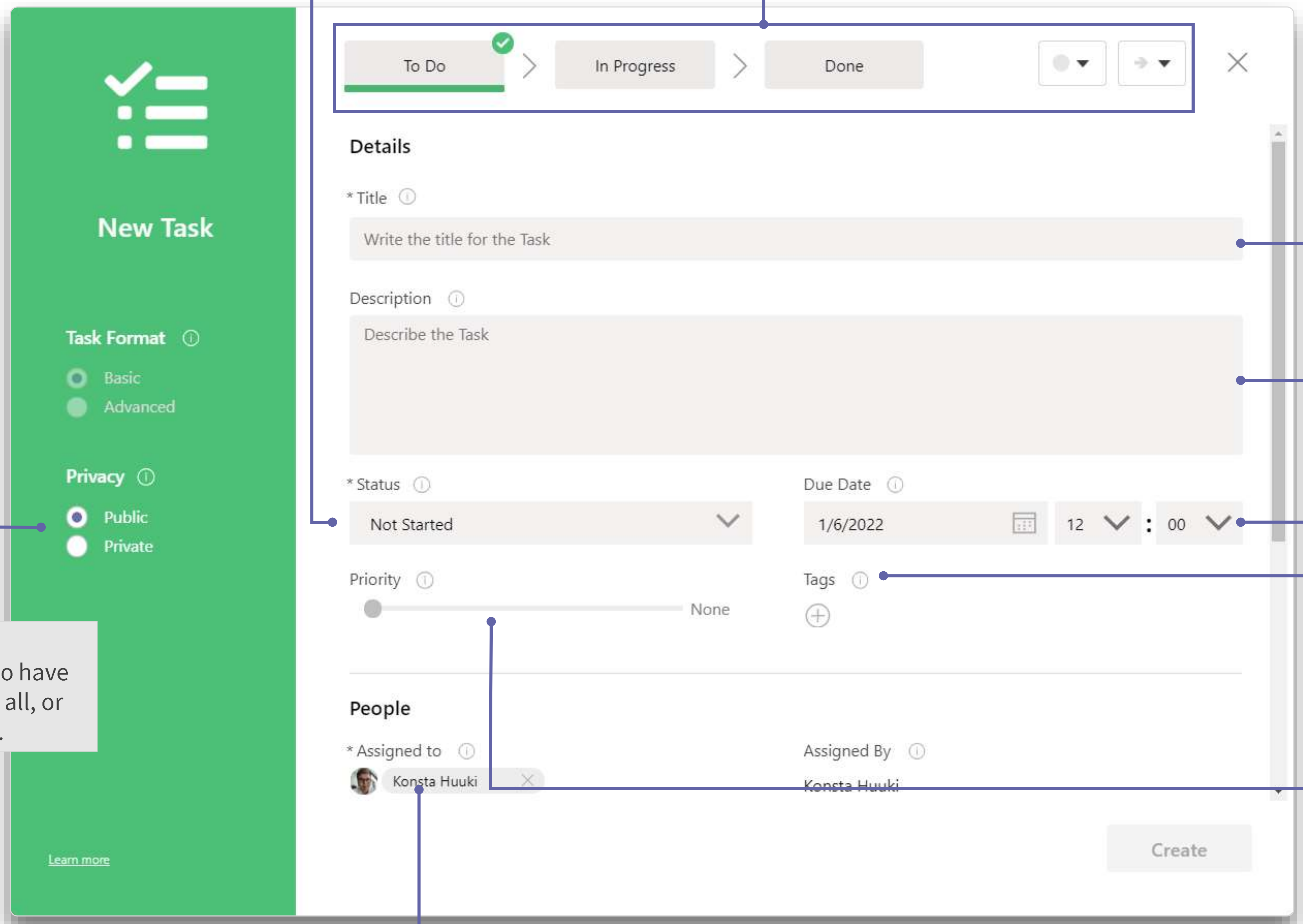
Elements of the *New task* popup

Status
The status indicates what is the current progress of the task

Title
Enter the Task you are looking to complete here

Description (optional)
Type additional details of the task in the description field

Due date
Select the due date and time for the Task's completion



Tags
Relate the task to a relevant business process or domain

Visibility
Choose whether to have the task visible to all, or only the assignee.

Priority
Urgency and importance. The higher the priority, the higher the task will appear on lists. Priority will also be shown on the Task card

Assigned to
Who is the responsible person for the task (by default yourself)

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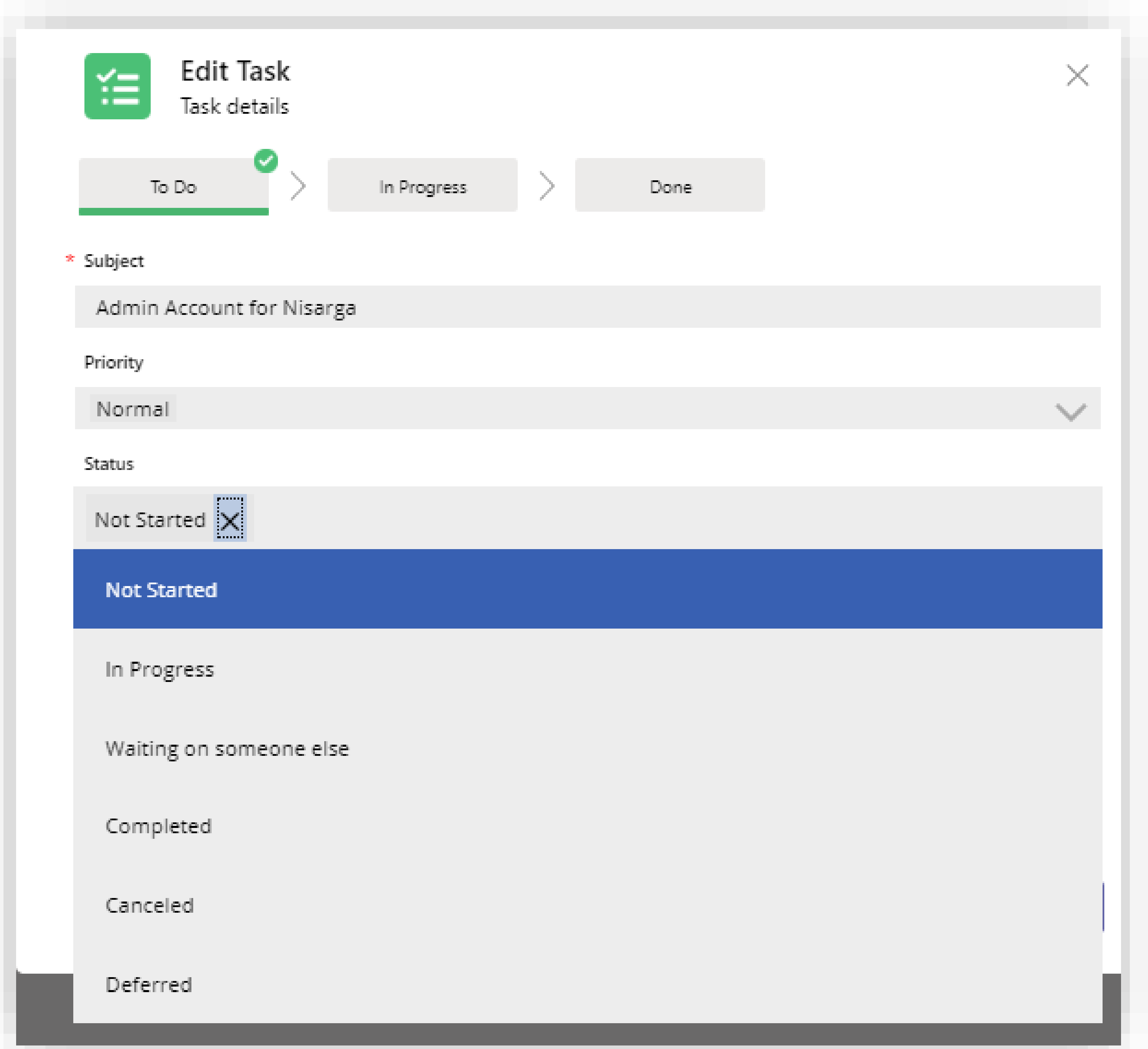
The Task undergoes three stages in its life cycle

To Do > **In Progress** > **Done**

To Do
- Not Started

In Progress
- Waiting for someone else
- In Progress

Done
- Completed
- Cancelled
- Deferred



1. Creation

You write down something you need to get done, and when it needs to be done. Then you can take it off your mind, freeing your brain capacity to another job at hand. Others are also able to see that you have the task on your to-do list.

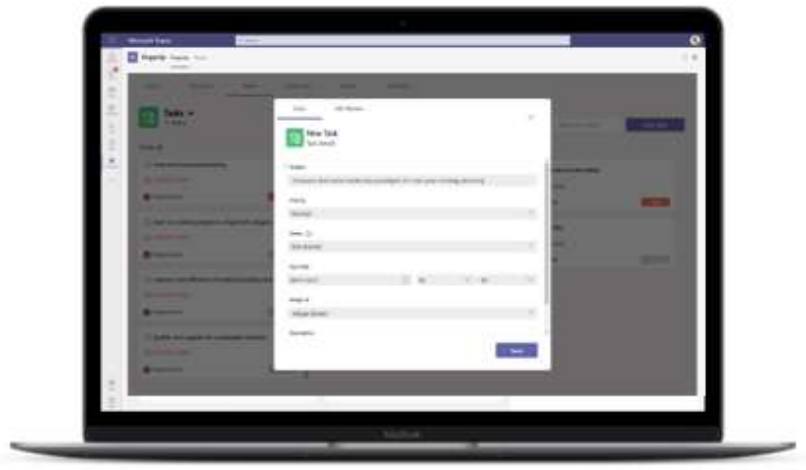
2. Working on it

You change a task's status to "Doing" or "In progress", when you start working on it. This communicates to others, that the task is being worked on. In Fingertip, we have several descriptive statuses for this phase.

3. Closing

When the task is complete, or no longer relevant, you can move it to the last phase of its life cycle. This tells also others that the task is complete. It feels good, closing tasks, doesn't it? Remember to do it often enough so they won't stay forever in your to-do list!

Step-by-step guides [TASKS]



How to create
a task

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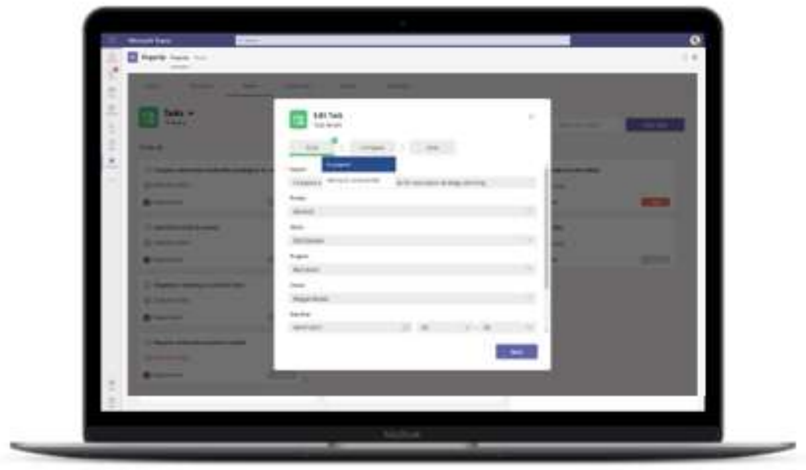

How to update
a task

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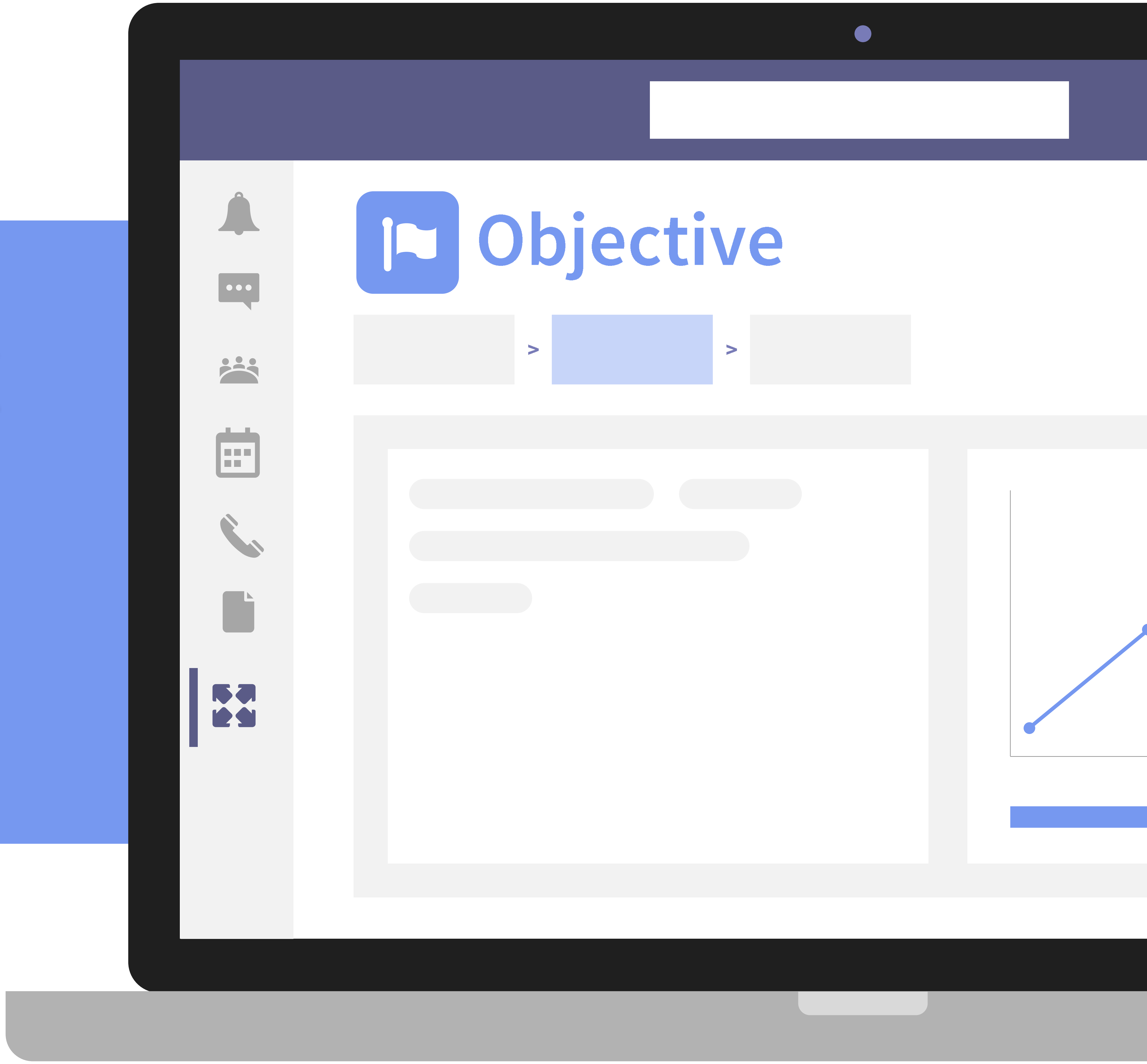
Increase strategic alignment with objectives



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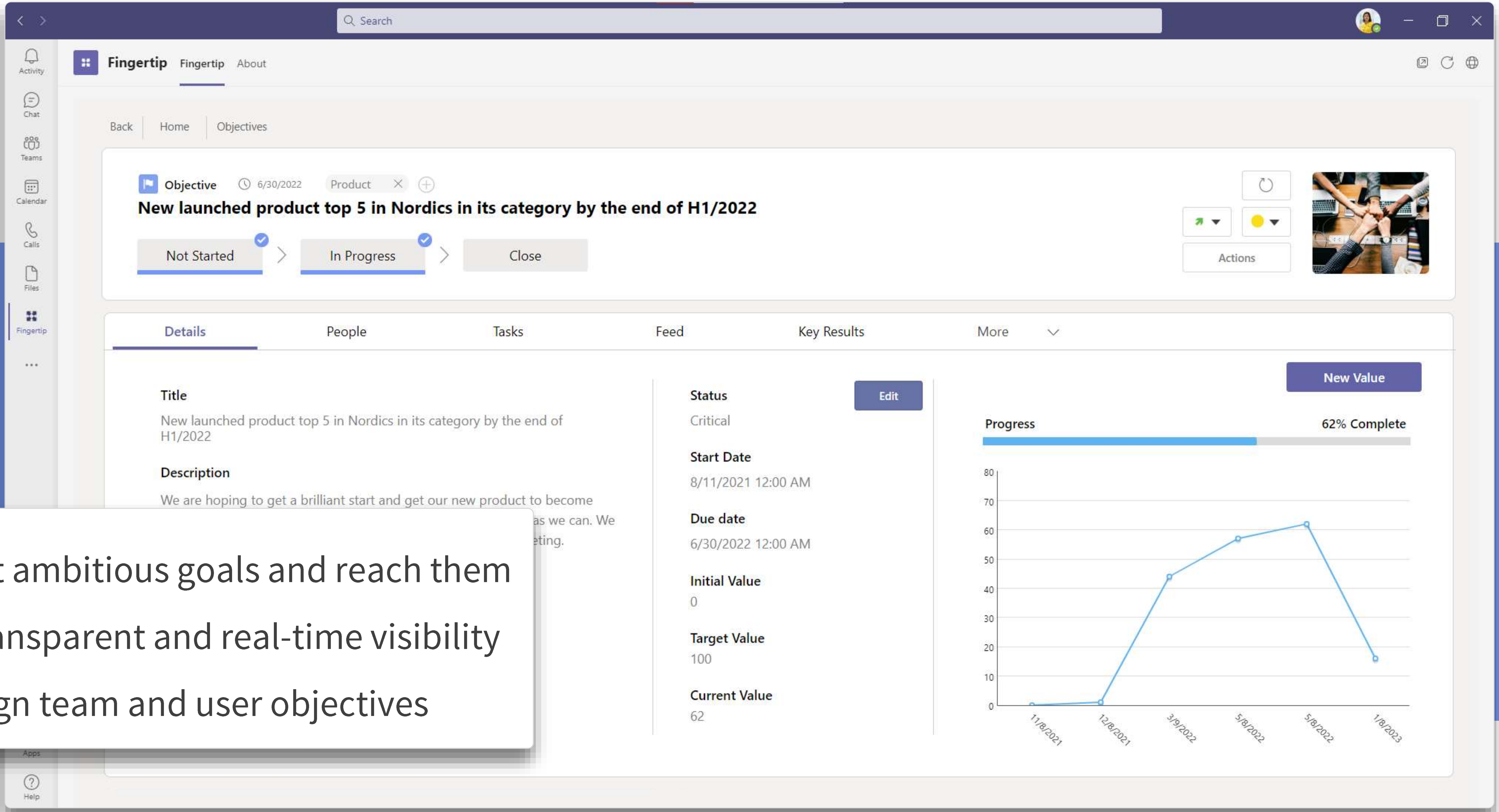
OBJECTIVE.

Ensure focus and alignment with Fingertip Objective

- With Objectives you can create goals that you can prioritize, categorize and discuss.
- Fingertip objectives are numeric, measurable and inspirational goals with high ambitions.
- A comprehensive, holistic system for managing objectives and linking them to daily operations.
- Boost motivation and engagement in employees and increase organizational performance.

Lead with your strategic goals in mind



- Set ambitious goals and reach them
- Transparent and real-time visibility
- Align team and user objectives

Microsoft Partner

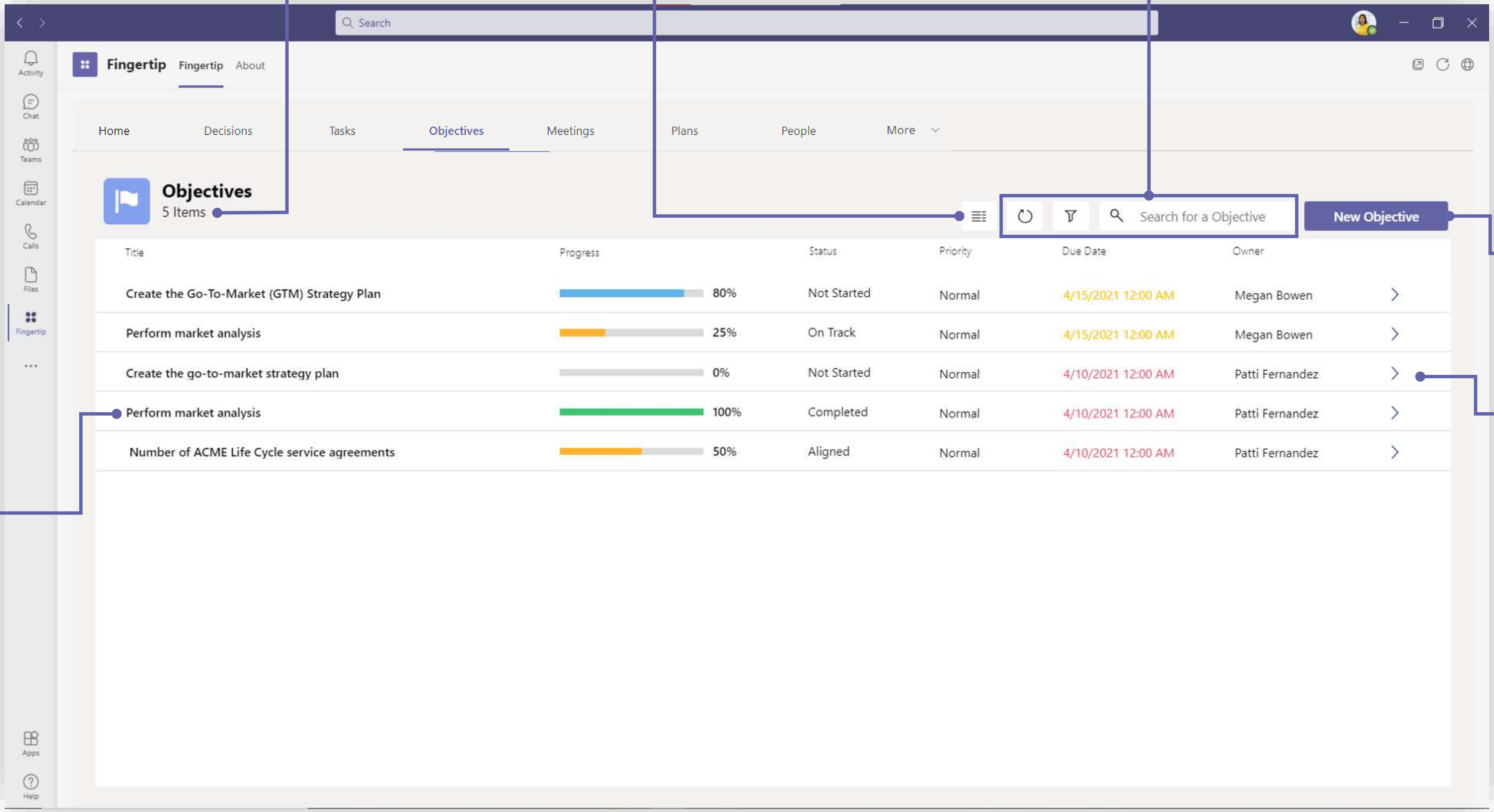
FINGERTIP

Elements of the Objective Tab

Record Count
This field shows total number of Objective records in which you're participating

Find different views the Objective
1. List
2. Kanban Board
3. Key Results

Refresh, filter and search
Refresh the list for changes, filter by pre-determined information or search by title



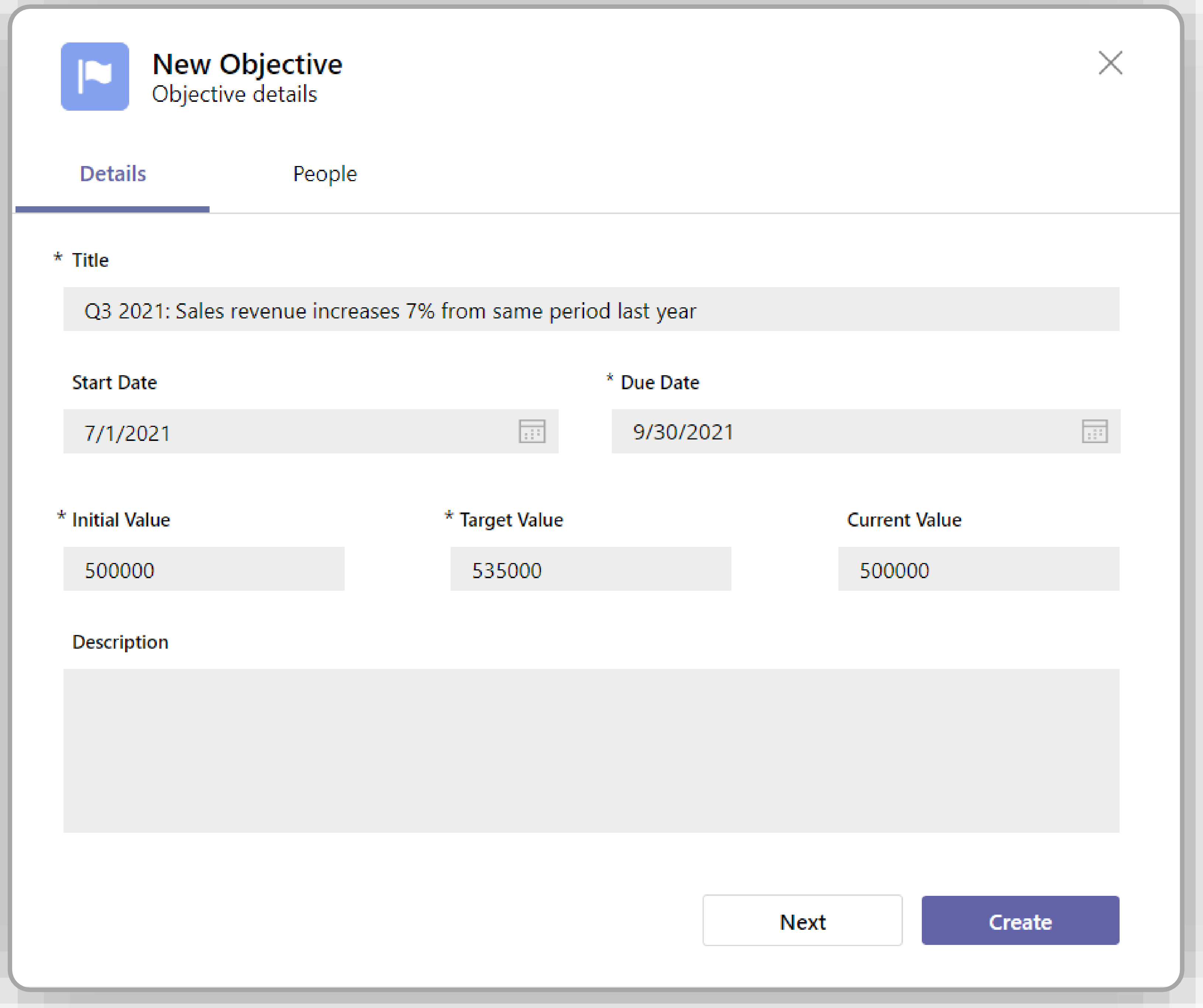
Create New Objective
New objective button let's you create new Objective

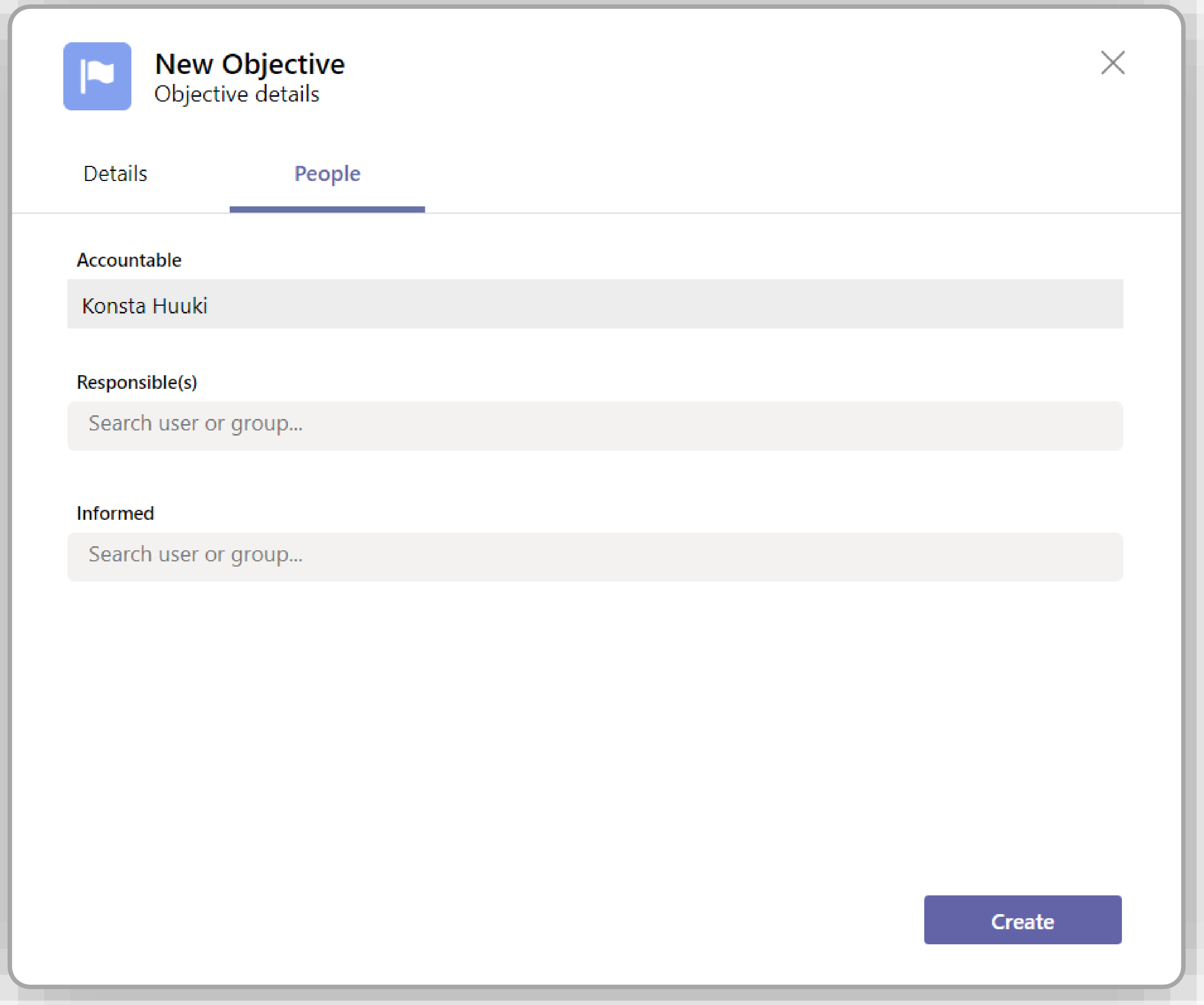
Open Objective
Press the arrow to see full details and historic info.

Objective record summary
View important details of your objectives: Title, Progress Bar, Life cycle status, Priority, Due date and Accountable person

FINGERTIP

New Objective popup





1. Enter a Title and Description for your Objective. Set the timing when you started to measure progress and when you will end. Insert the starting value, target value (and optionally current value). Describe more important details for the Objective if you want.

2. Switch to the people tab by clicking Next, or by navigating from the top

3. Add Responsibles (able to edit) and Informed (able to view) people to your Objective

4. Press Create to share and start measuring!

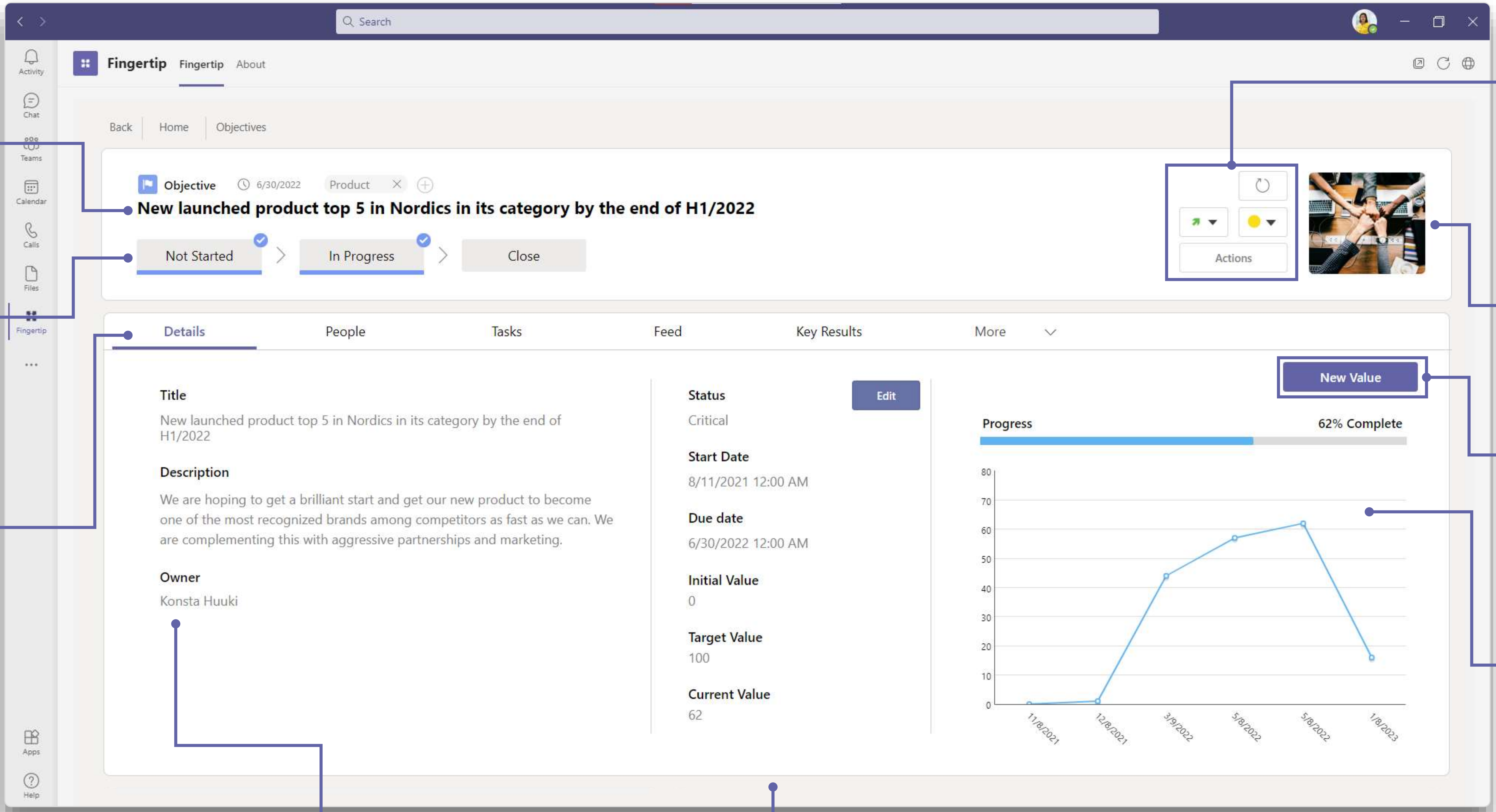
FINGERTIP

Elements in the Objective item

Title section
This element gathers the Objective title, timing and any tags attached to it

Objective life cycle
Visualizes all the phases as well as the current phase of the Objective process

Objective tabs
Navigate through the contents within your Objective. Show related items, Key Results, discuss the Objective and more



Refresh button, status indicators and action menu
Show the progress and status, and use the action menu to see all available actions in the Objective

Decoration image
Use one of the presets or upload your own to customize the object

New value button
Update the current objective progression

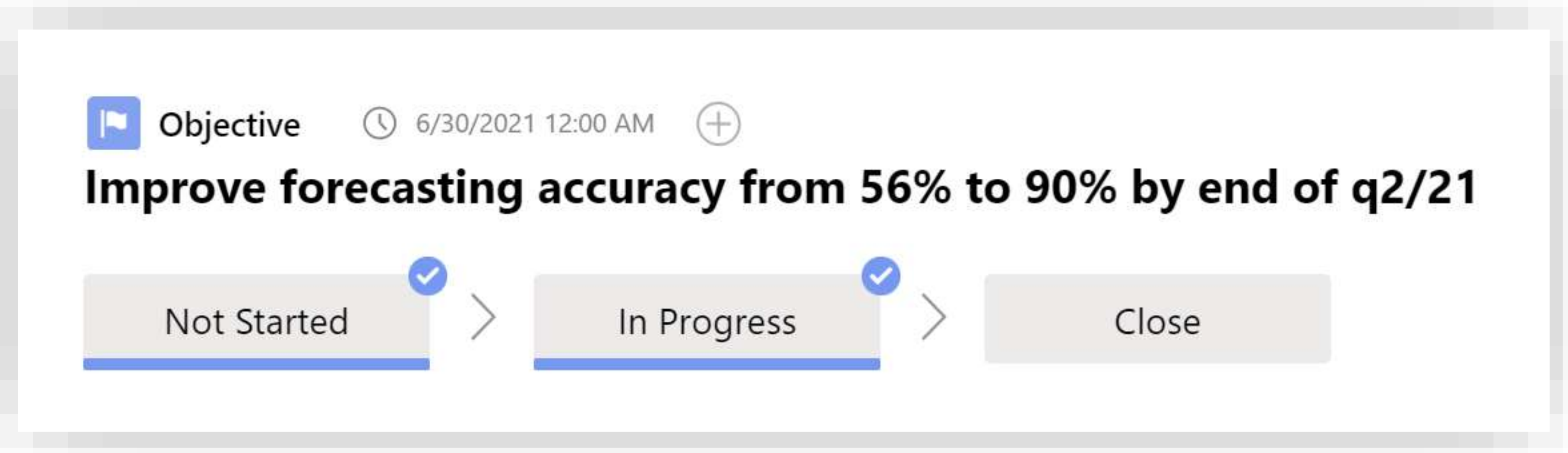
Progress bar and chart
Show the status towards your target as well as historic progress

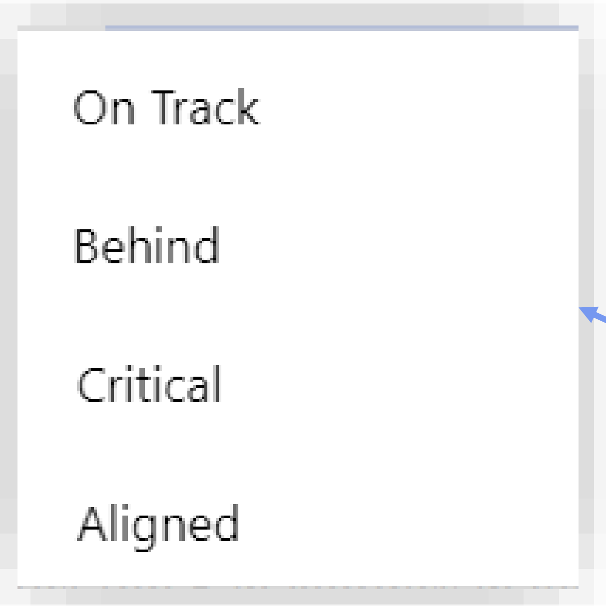
Objective details
The default tab. Shows the Title, Description and Owner of the Objective

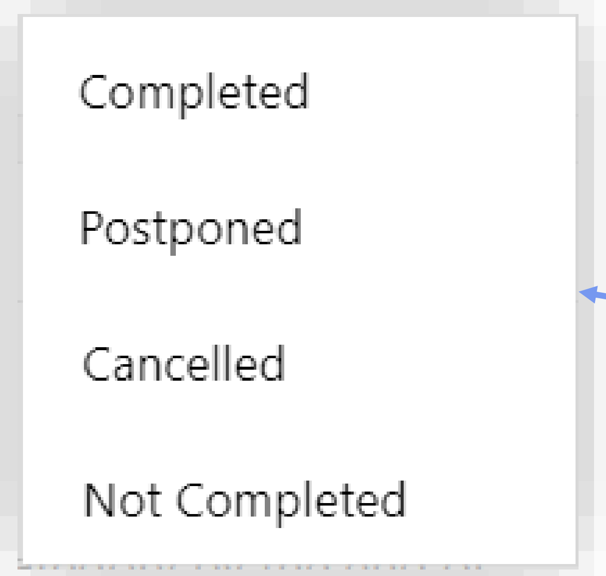
Plan details
Second column shows the status, timings and values attached to the objective measurement. Pressing the “Edit” button allows changing any details of the Objective

FINGERTIP

Objective Life Cycle





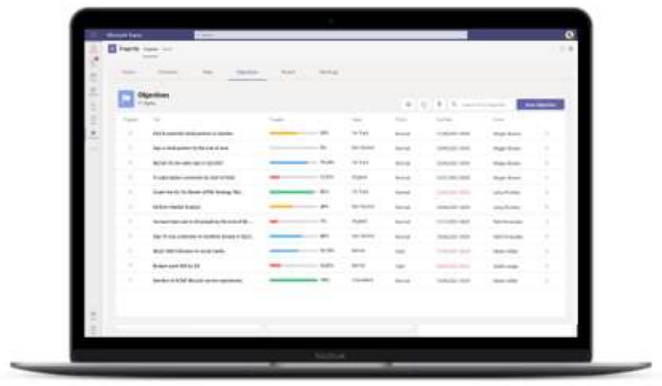


1. Not Started : Initial drafting phase. The accountable writes the goal in a single sentence and expands on their thinking through the description. They set the timeline, the initial values and invite the relevant people to follow or contribute to the completion of the objective,

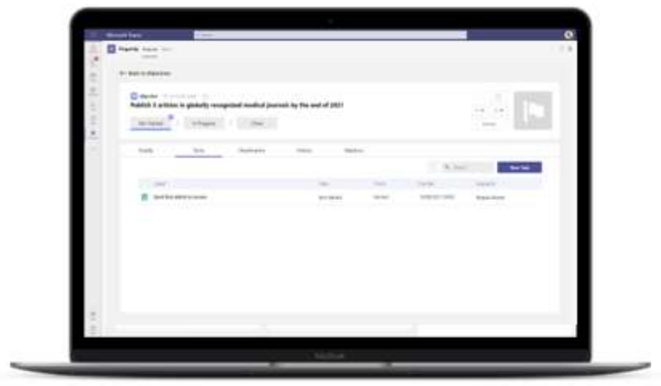
2. In Progress : The objective is being measured. Can be marked *On Track, Behind, Aligned* or *Critical.* In this phase, you can use key results to chop the decision to simpler and more measurable metrics. While in progress, the participants should update the progress manually with clear intervals.

3. Close : After the follow-up period and evaluation the Objective will be closed. The process and outcome are evaluated, and the results are assessed to help future objective setting. The closing status can be set as *Completed, Postponed, Cancelled* or *Not Completed*.

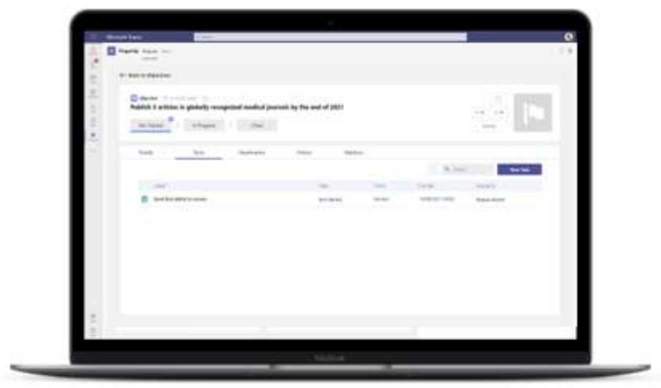
Step-by-step guides [OBJECTIVES]



How to create
an objective

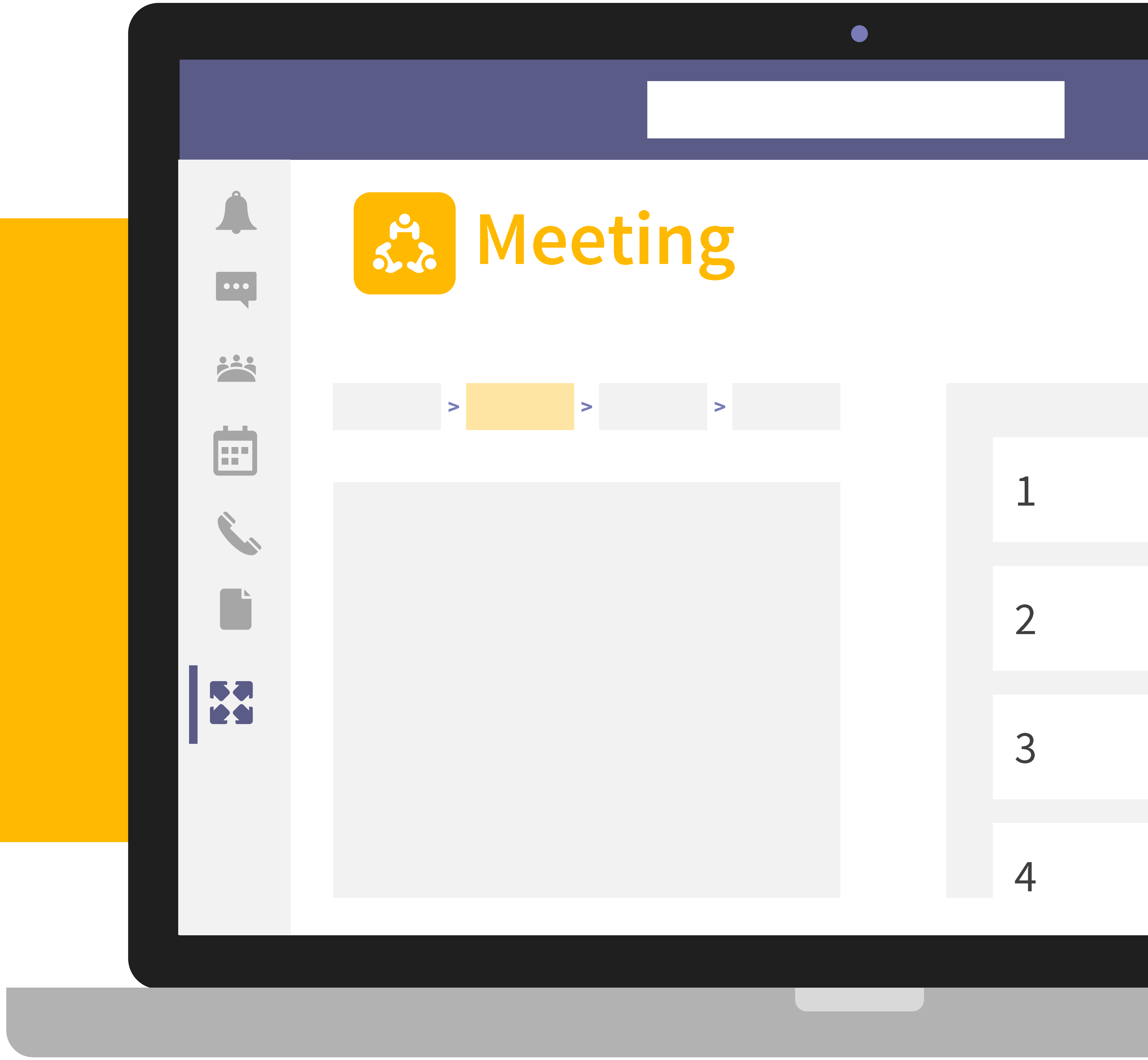


How to manage tasks
in an objective



How to use key results
for an objective

Digital meetings that get things done



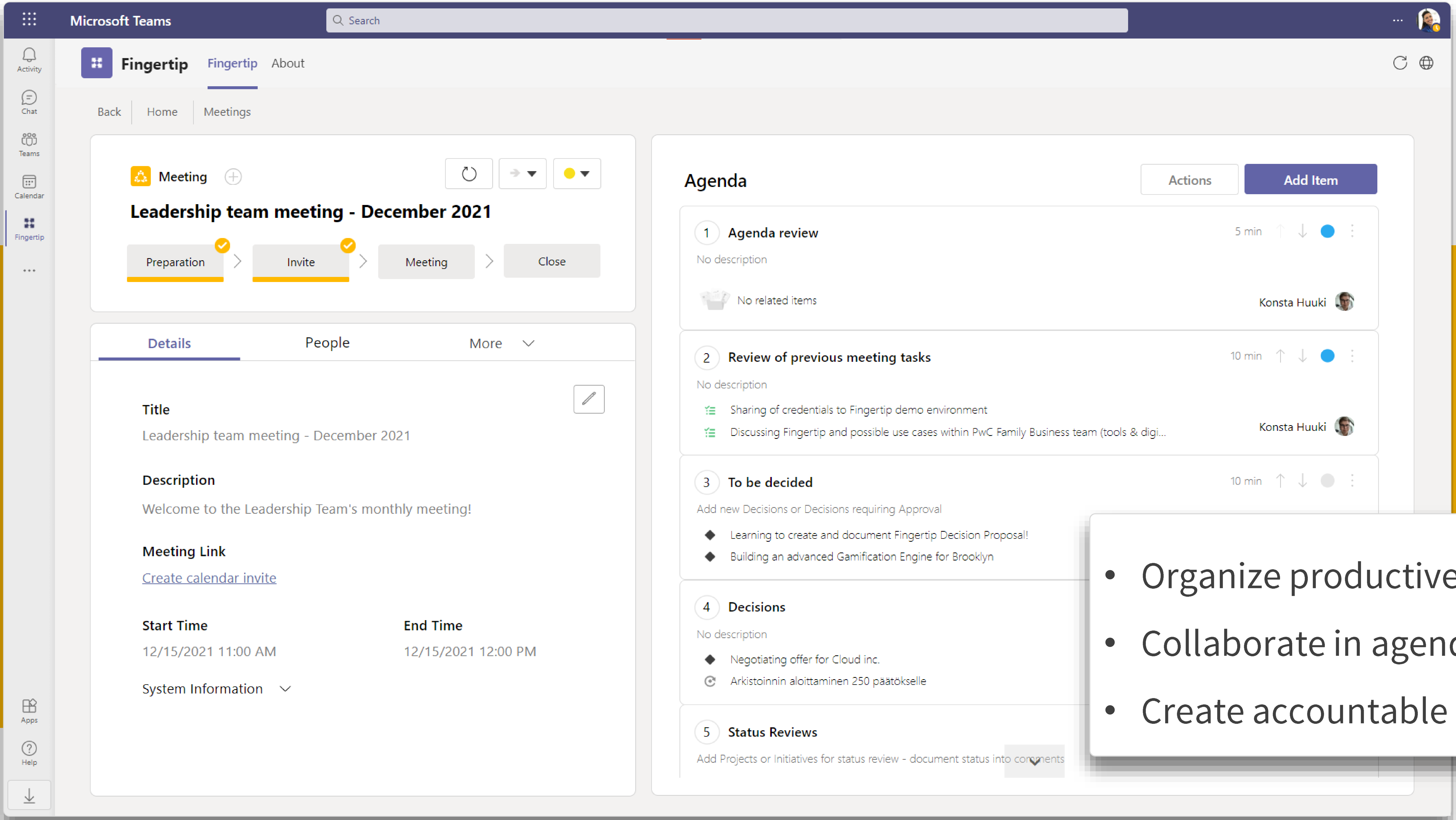
FINGERTIP

MEETING.

Make the most of meetings with Fingertip

- Create a digital agenda for your meeting, with items tied to concrete tasks, decisions and objectives. Set timing and assign accountability, and ensure productivity during meetings!
- Create a calendar invitation linked to your meeting, invite the relevant people and start collaborating asynchronously even before the actual meeting time.
- Document the decisions you make and the follow-up items you agree on in Fingertip. Create measurable impact out of every meeting!

Meetings that get things done



- Organize productive meetings
- Collaborate in agenda creation
- Create accountable follow-up

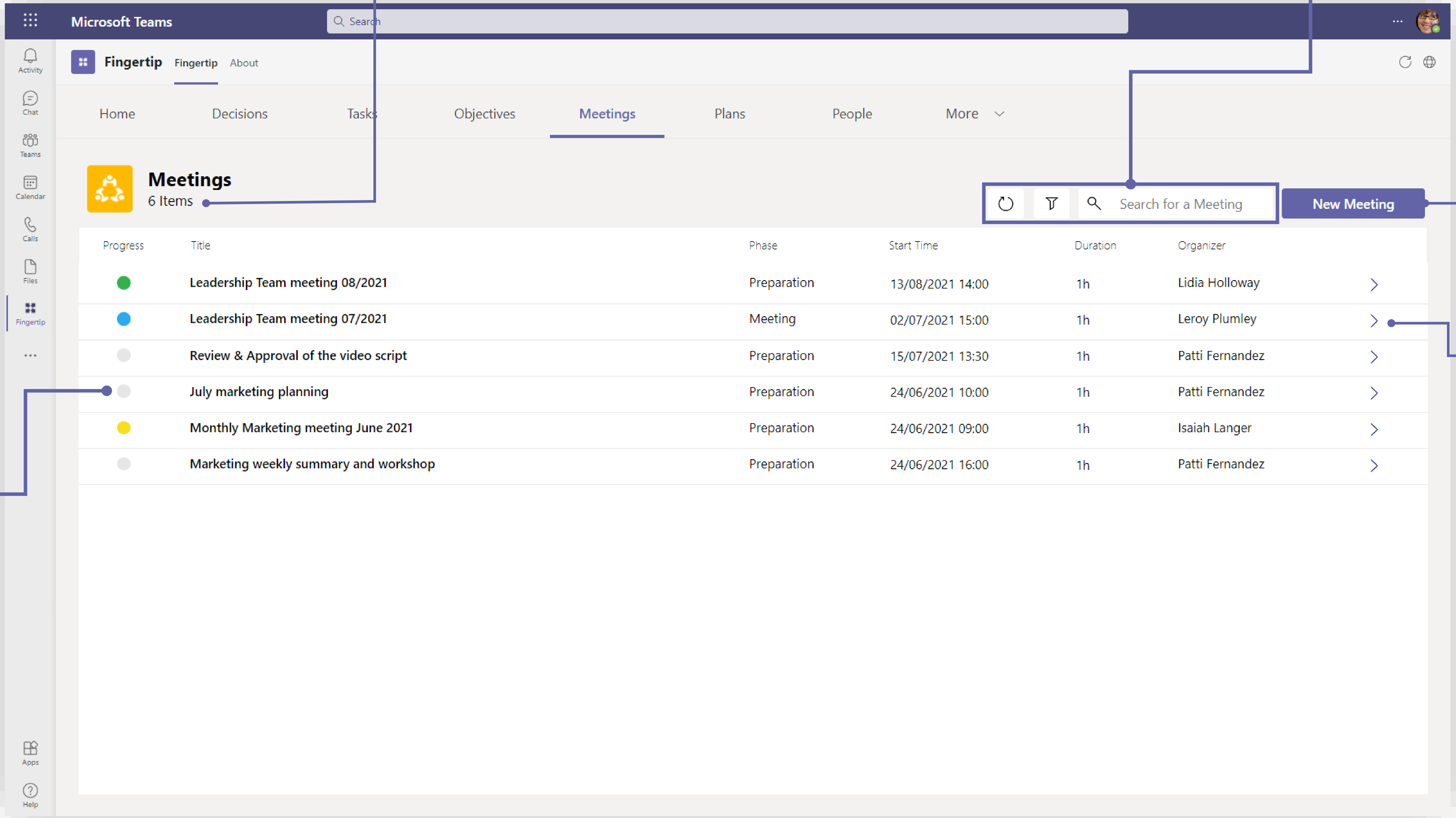
Microsoft Partner

FINGERTIP

Elements of the Meeting tab

Total Meetings
Shows total number of meetings created

Refresh, filter and search
Refresh the list for changes, filter by pre-determined information or search by title



New Meeting
Create New meetings let's you create new Meetings and add attendees for the meeting

Open Meeting Record
Click arrow to open the meeting record details.

Meeting record summary
View important details of your objectives: Title, Life cycle Phase, Starting time, Duration and Organizer

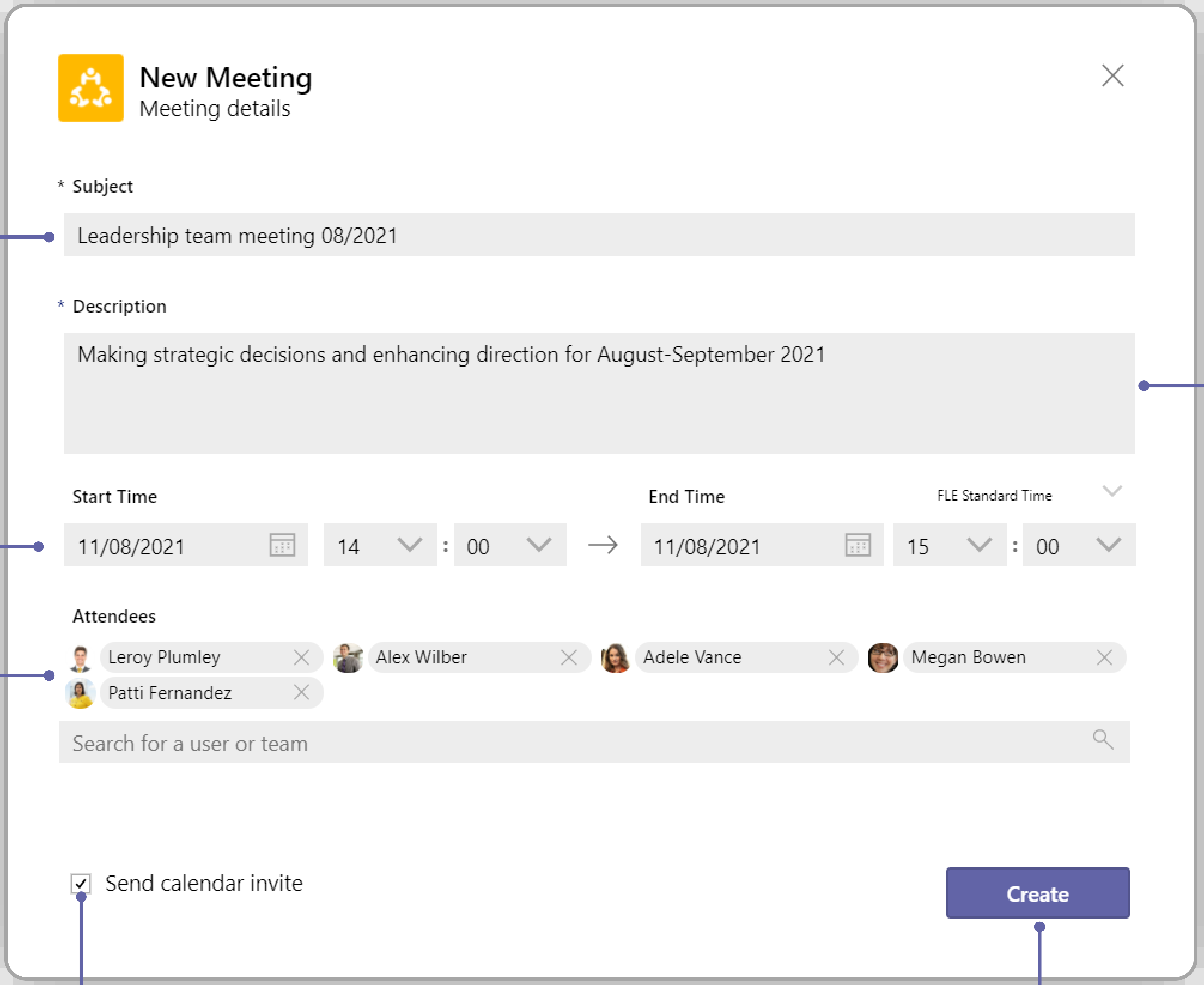
FINGERTIP

New Meeting Popup

Subject
Descriptive title of what and for whom the meeting is for

Meeting timing
Set the date and time for the meeting.

Invite people
Add the attendees who are invited to participate.



Description
Describe your meeting in a few sentences. This will help attendees to prepare for the meeting.

Send a calendar invitation
Select to invite attendees automatically

Schedule the meeting
When ready click Create.

FINGERTIP

The Meeting Record page insights

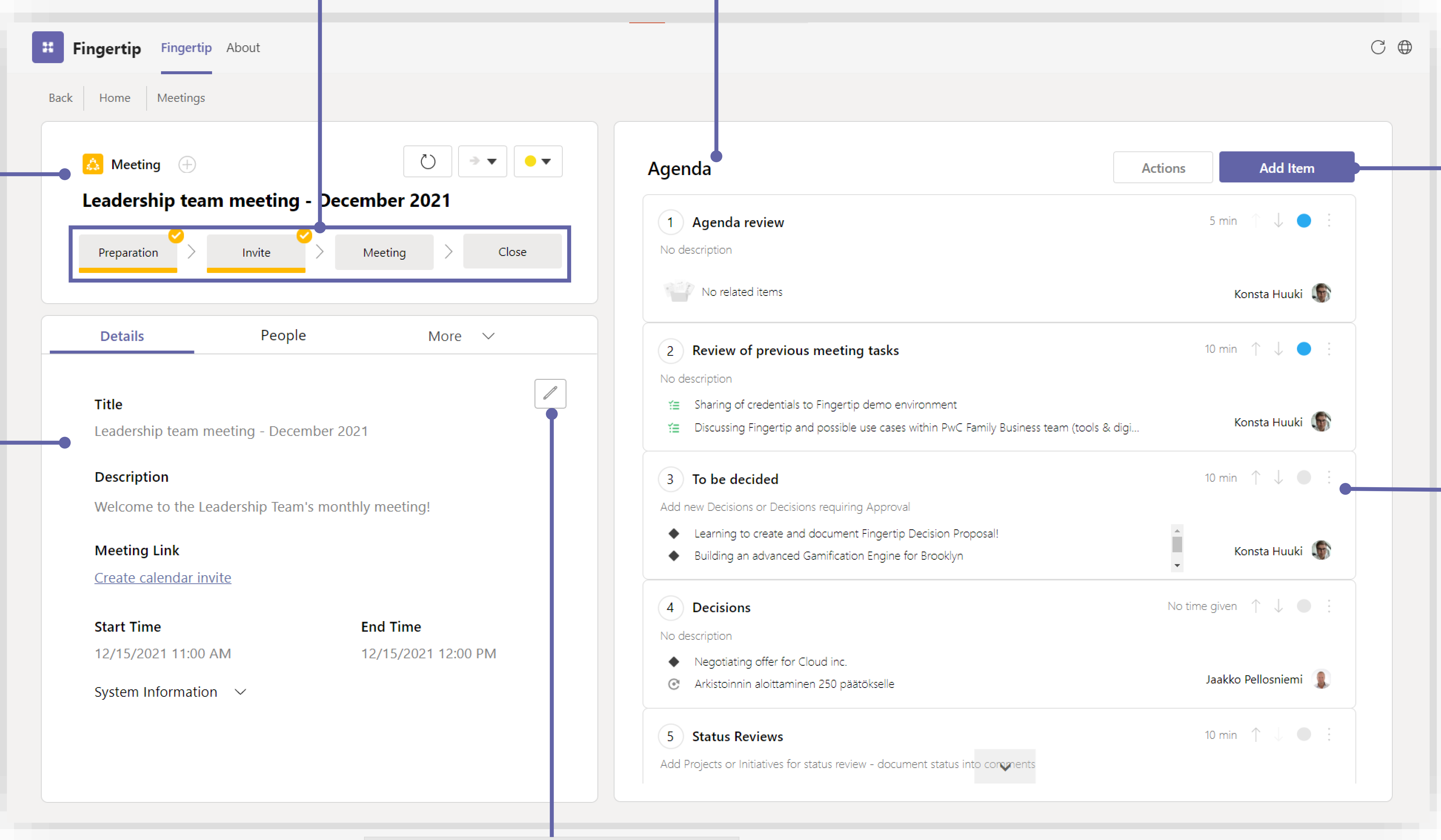
Meeting life cycle
Visualizes all the phases and highlights the current phase of the Meeting process

Agenda
Shows the topics to be presented, as well as their presenters, durations and attached items.

Meeting details
Summarizes the meeting details in one view.

Add Item
You can add ready records from Fingertip, URLs, files, or create new Items. Also assign the agenda item to a specific person and provide time to be used on the item in the meeting.

Agenda item
Agenda items are topics in the meeting discussion. They have their own process traffic lights, accountable presenter and duration. They can also include Fingertip objects that you can interactively open using the meeting agenda.

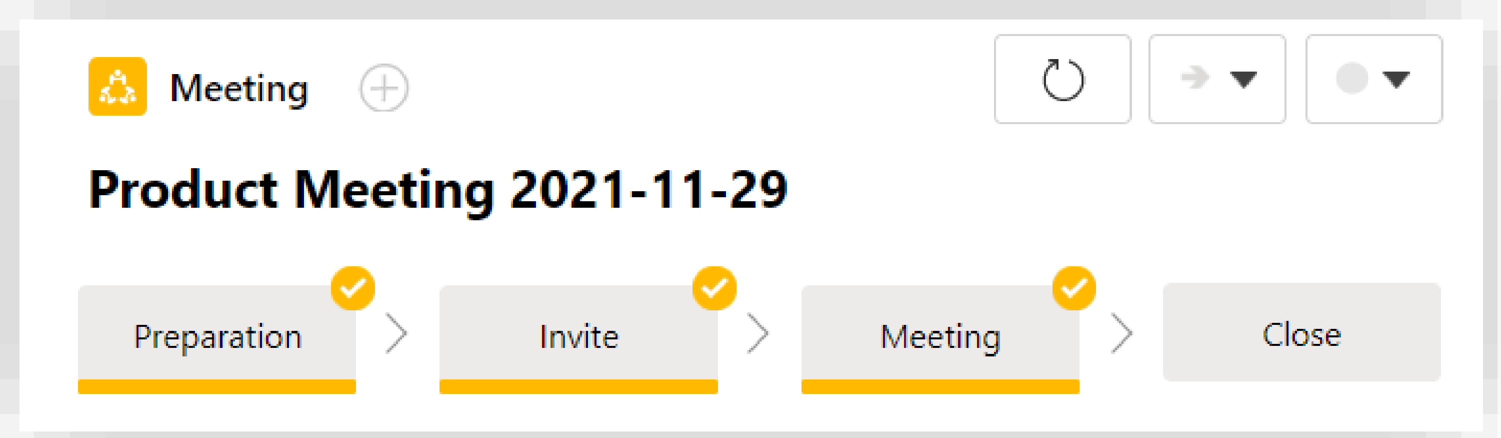


Edit Meeting details
Click on the pencil icon to edit the details of the meeting.

Microsoft Partner

FINGERTIP

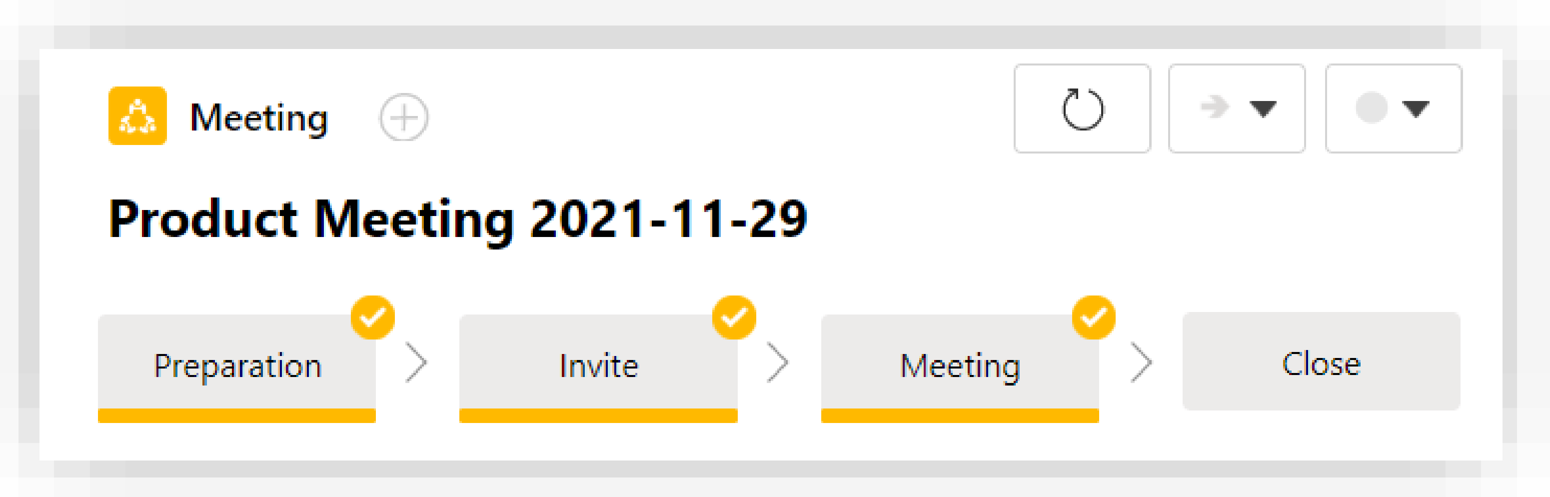
Meeting life cycle



- Fingertip meetings are process oriented objects with a life cycle to indicate the progress. There are 4 phases to the Meeting life cycle:
  - Preparation – The chairperson (or someone else tasked with the meeting agenda) creates the meeting. They give it a title, description and time, and choose the participants. They can also start preparing the agenda. All the participants can also see the meeting being prepared already.
  - Invite – The participants are sent an invitation to collaborate in preparing the meeting, and to join at the time of the actual meeting. If unable to join, they can use the meeting agenda to communicate their reports or opinions on decision items.

FINGERTIP

Meeting life cycle



- Meeting – The meeting is in the meeting phase during the actual meeting and until all the follow-up items talked about during the meeting have been completed.
- Close – When the meeting is over, if no follow-up items are left over, or if they have been properly addressed, the meeting can be moved to the Close phase.

FINGERTIP

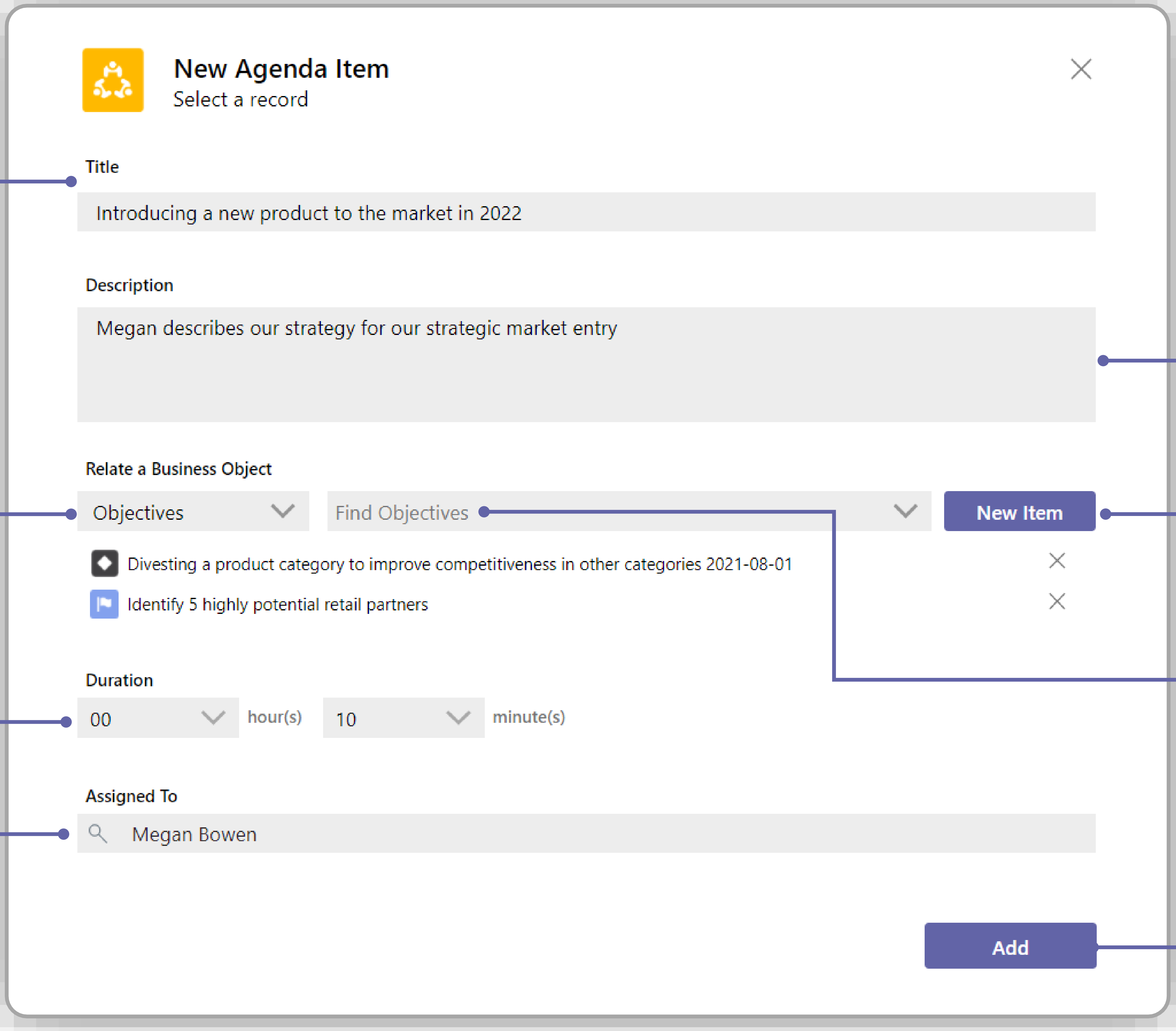
New Agenda Item Popup

Title
Write a descriptive topic for the agenda item

Record type
You can select which records to filter in the Find Items dropdown

Duration
How much time during the meeting will be allocated to the agenda item

Assigned to
Select the person accountable for presenting the Agenda topic



Description
Elaborate on the topics and contents of the agenda item

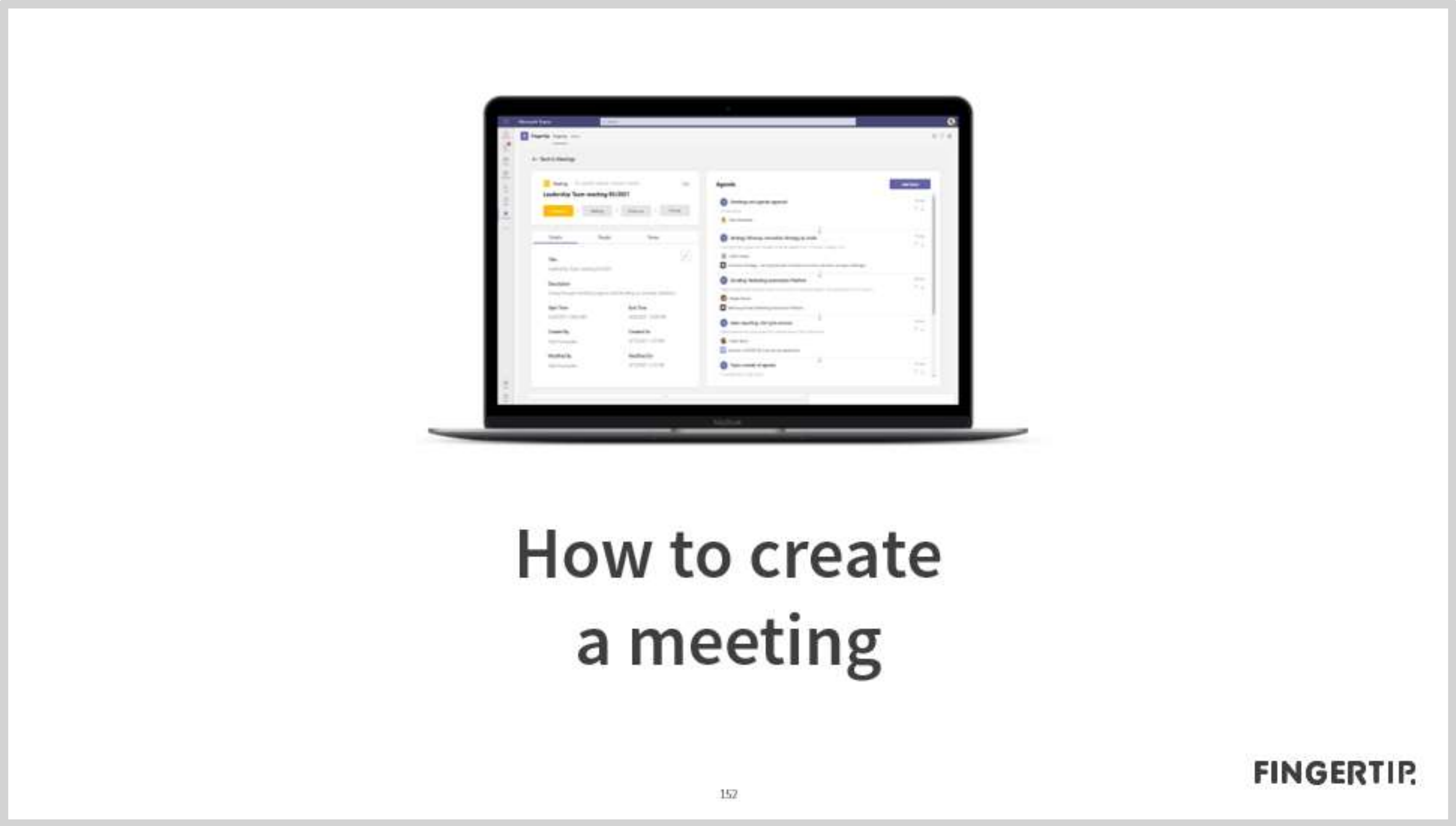
New Item
You can also create new items from scratch from the same popup to attach

Find the records
Search for or select a recent Fingertip item to attach to this Agenda topic

Add
By clicking on add the Agenda Item will be added to the bottom of your agenda

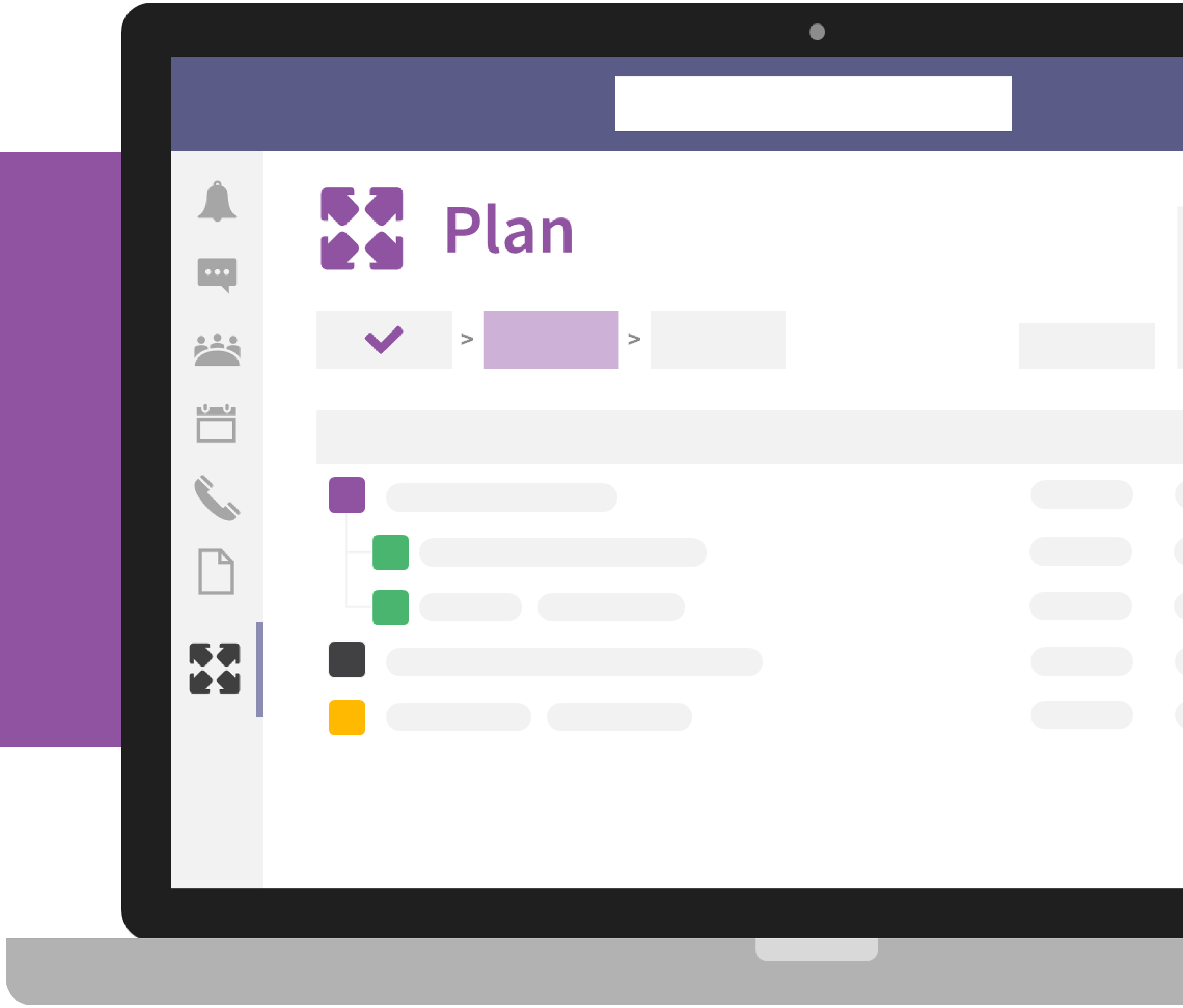
FINGERTIP

Step-by-step guides [MEETINGS]



FINGERTIP

Inspiring project management



FINGERTIP

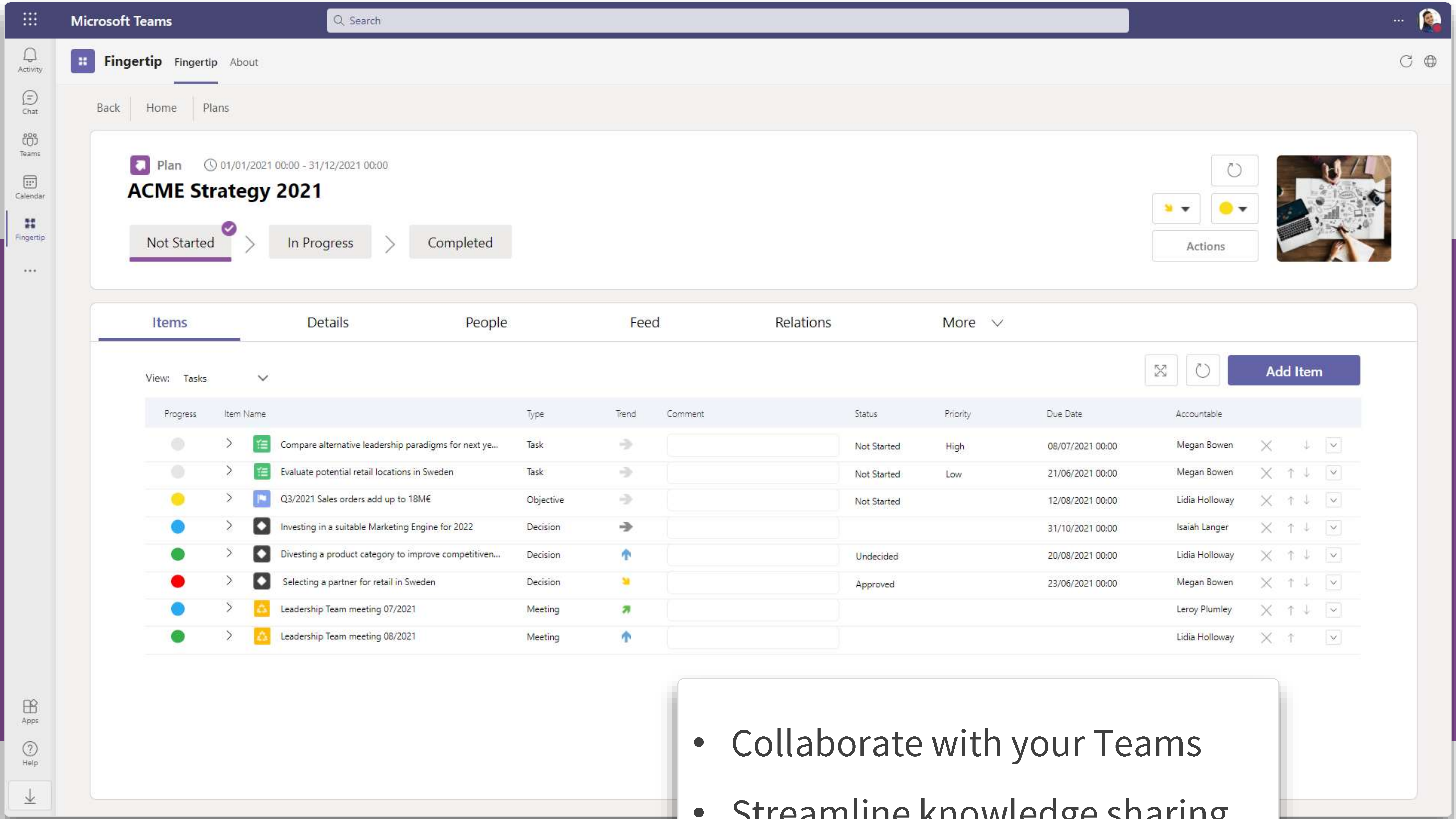
PLAN.

Gather items together for projects or structured processes.

- Create a visual list of items which you can prioritize, categorize and discuss.
- Link any Fingertip Teams items together to create logical paths and an index for your business processes and items.
- Involve the right stakeholders, collaborate transparently, and increase visibility and measurability in your critical projects and portfolios.

FINGERTIP

Plan impactful processes for projects and strategy

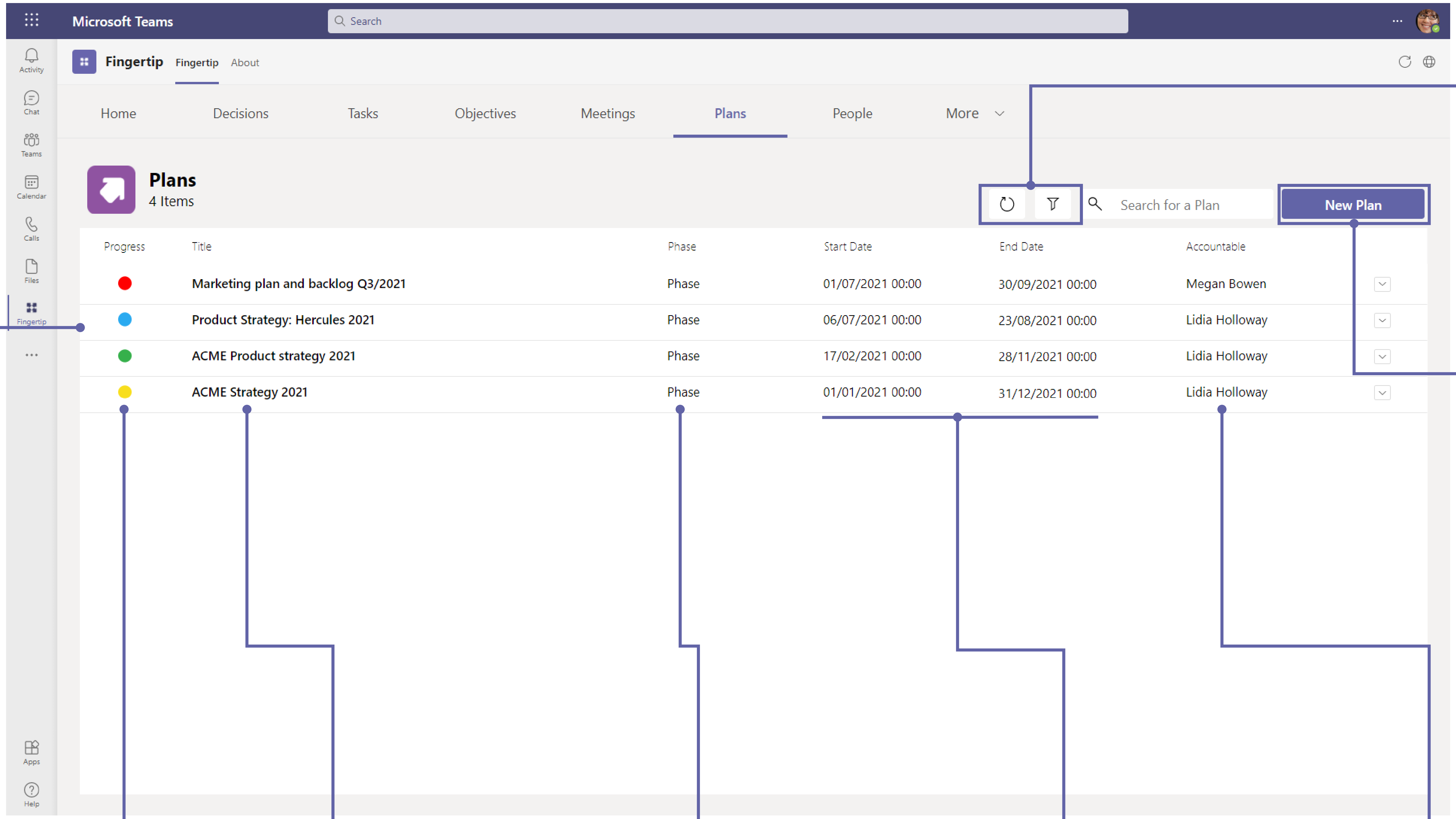


- Collaborate with your Teams
- Streamline knowledge sharing
- Improve communication

Microsoft Partner

FINGERTIP

Elements on the Plans tab



List of all Plans
This page gathers together all the plans you are part of in a simple and visual list view.

Refresh
Update the Page with the latest records created and data.

Filter
Filters the decisions based on Priority, User, and Status

New Plan -button
Create new Plan items

- Not Given
- Good
- Minor Challenges
- Critical
- Completed
- Completed with Problems

Progress indicator
Shows the current Plan progress in a traffic light system

Title
Descriptive name for the Plan in question

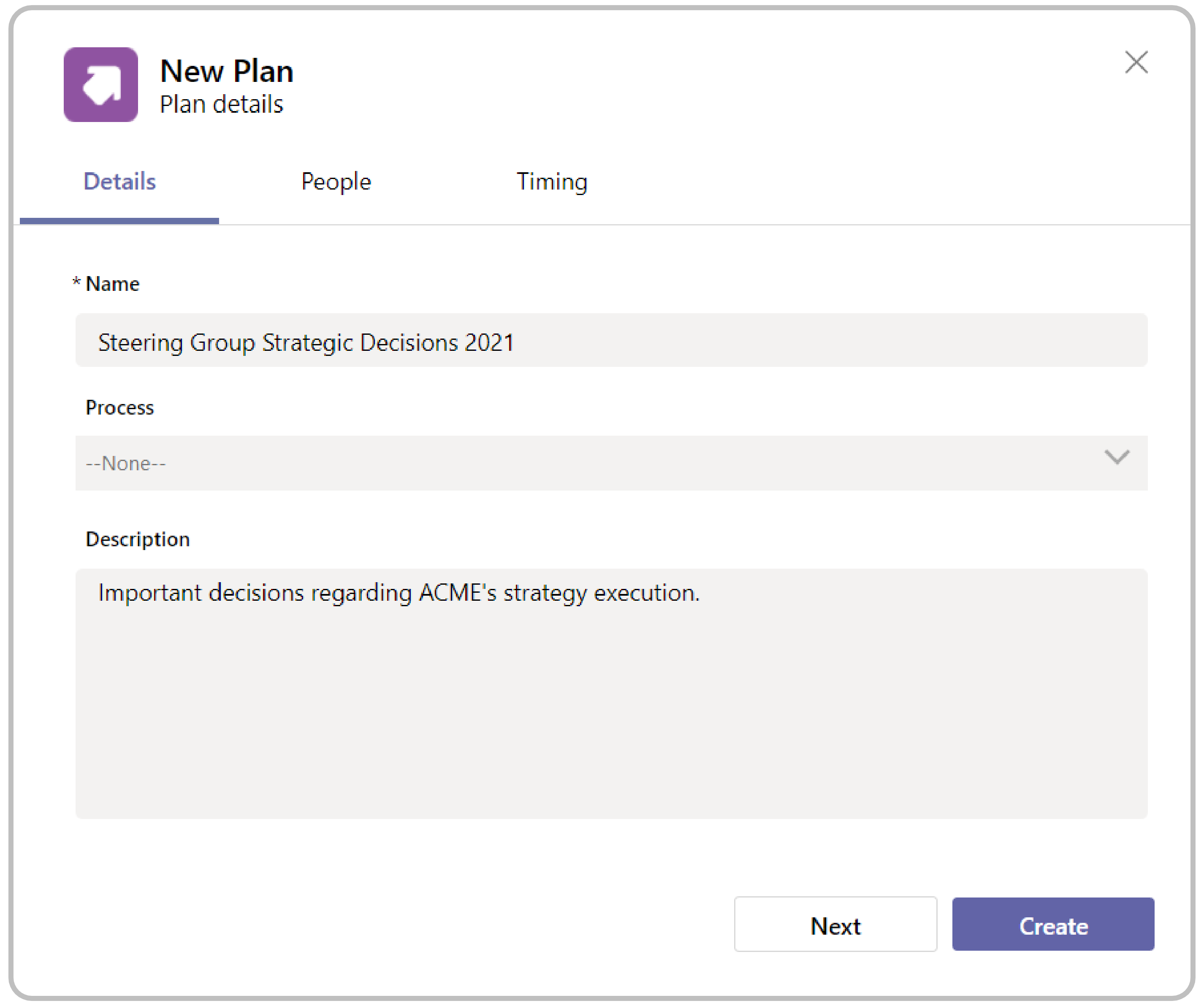
Phase
At which stage of its process the Plan is currently.

Timings
The start and end date of the projected Plan or Project duration

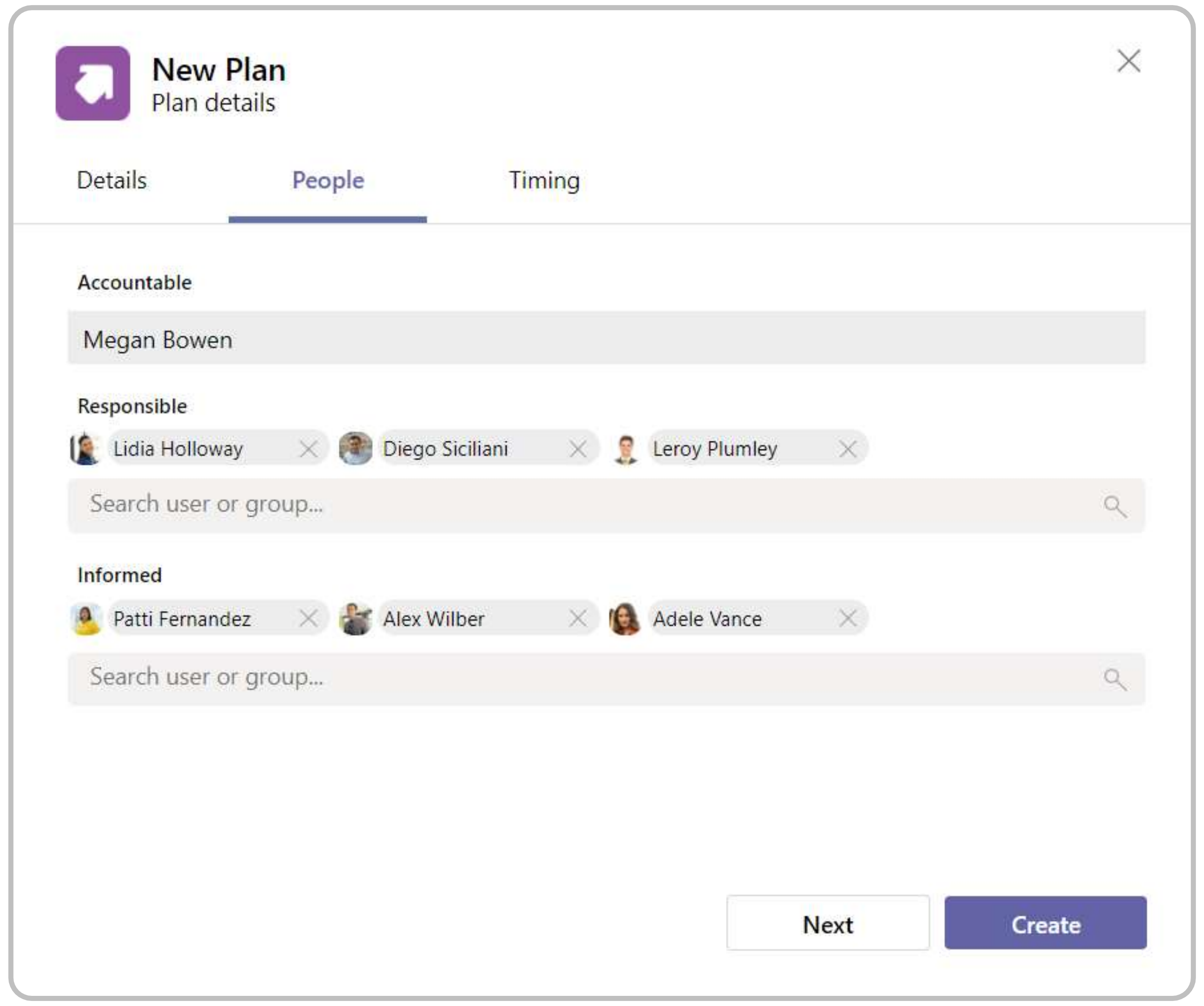
Accountable
The person in charge, who is the owner of the project or process depicted in the Plan

FINGERTIP

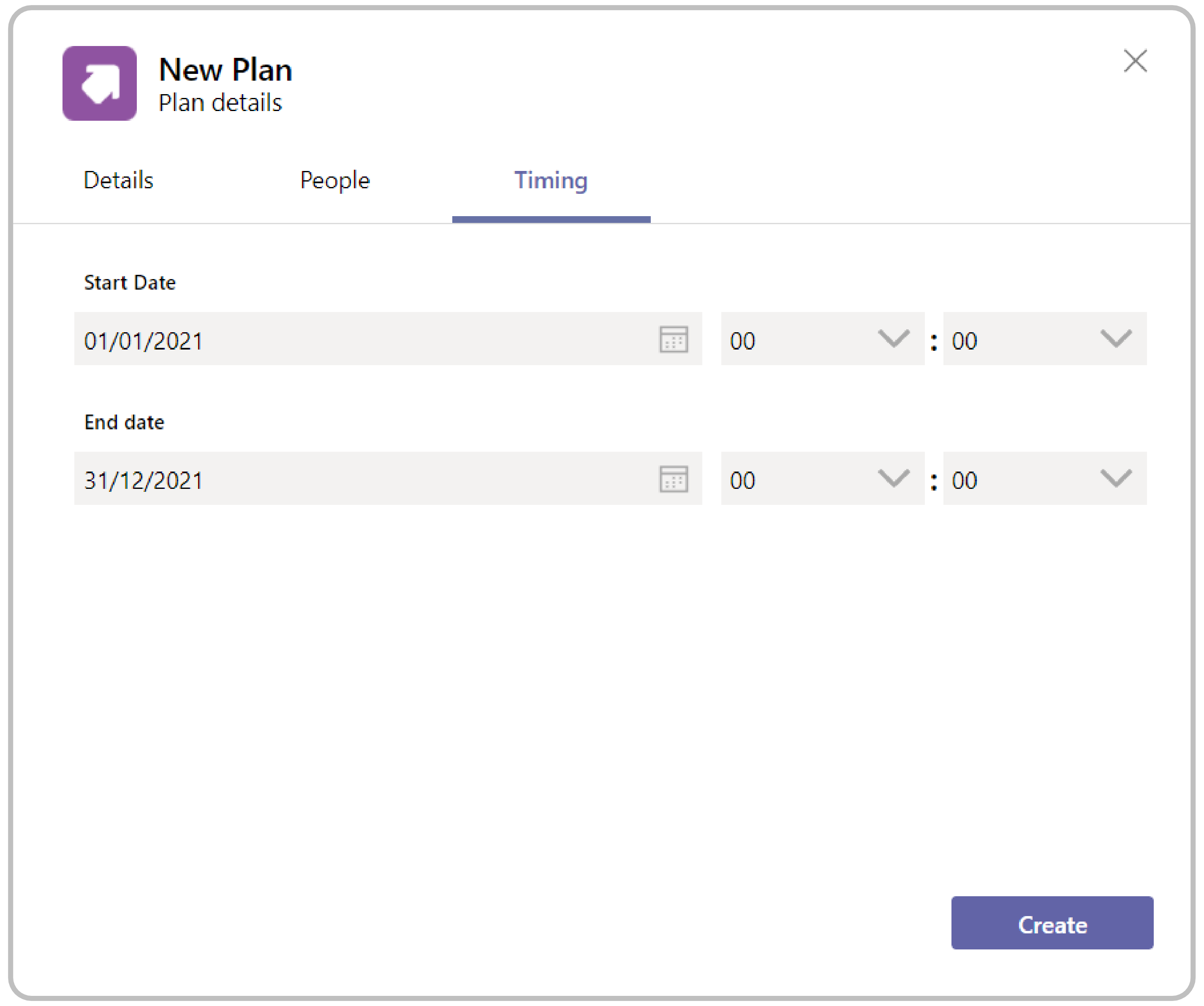
New Plan popup



1. Enter a Title and Description for your Plan. Future versions of Fingertip will include a variety of processes to choose from, currently only the default is available



2. Switch to the people tab by clicking Next, or by navigating from the top
3. Add Responsibles (able to edit) and Informed (able to view) people to your Plan



4. Add the timeframe, during which the plan should be active in the Timing tab. (Click Next in the previous screen or click the tab at the top).

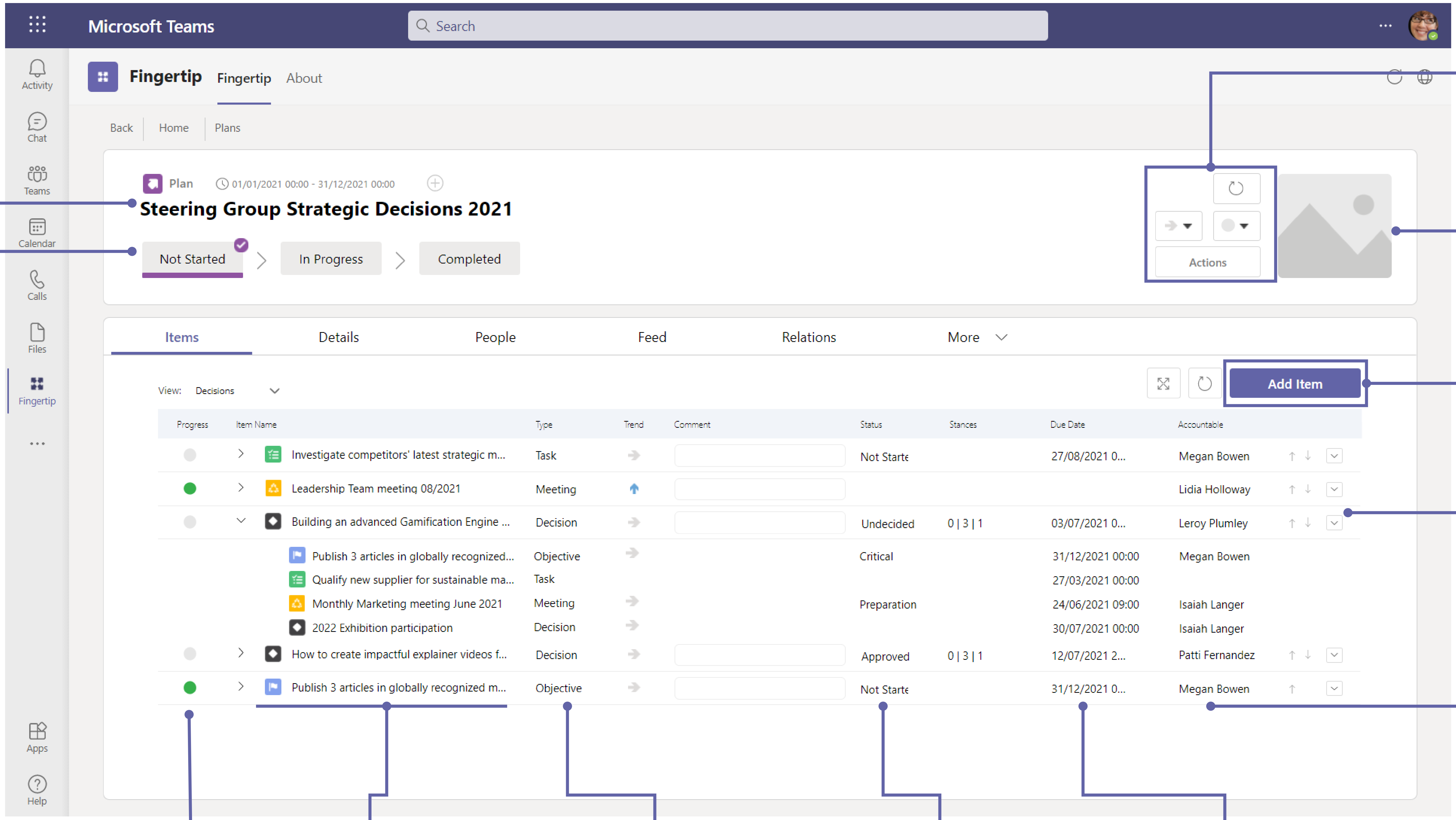
FINGERTIP

Elements in a Plan item

Growth Steady Decline

Title section
This element gathers the Plan title, timing and any tags attached to it

Plan life cycle
Visualizes all the phases as well as the current phase of the Plan process



Refresh button, status indicators and action menu
Show the progress and status, and use the action menu to see all available actions in the plan

Decoration image
Use one of the presets or upload your own to customize the object

Add item button
Add new or existing items to the items list

Item ordering and removing
Change the order of the list items or remove items from the list

- Not Given
- Good
- Minor Challenges
- Critical
- Completed
- Completed with Problems

Progress indicator
Shows the current Plan progress in a traffic light system

Title
Type icon and name of the item

Type
Which business object type is the item

Status
Shows the current stage of the item

Due date
The set date when the item is due

Accountable
Who is accountable of the item listed

FINGERTIP

Plan life cycle

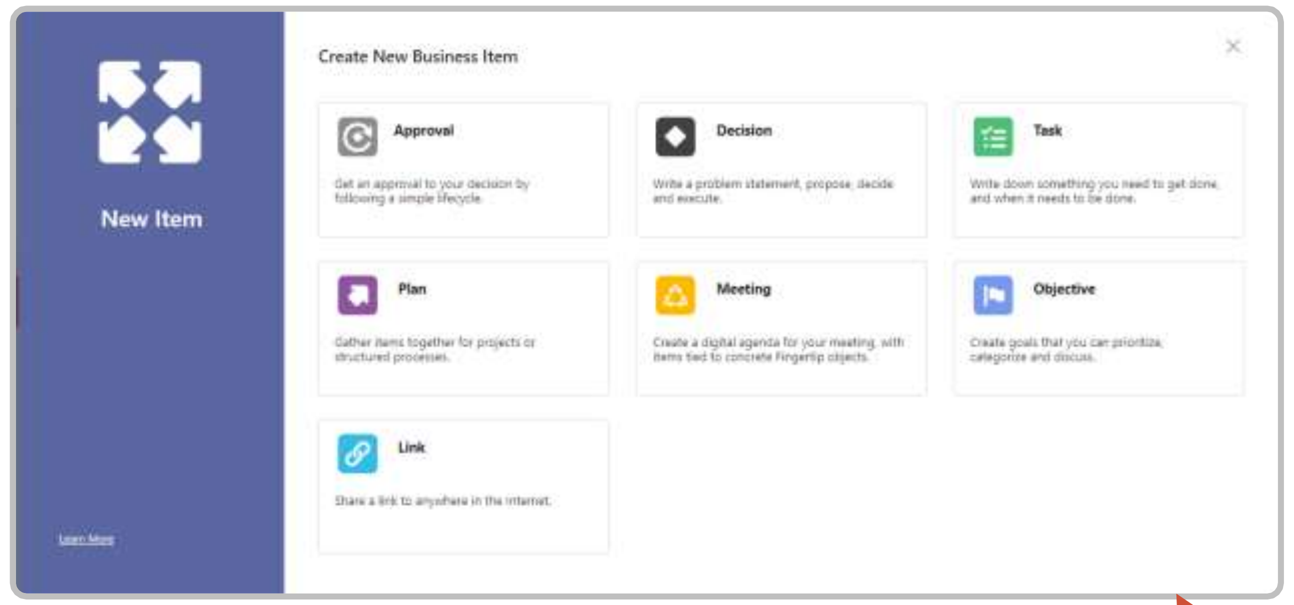
Plan 01/01/2021 00:00 - 31/12/2021 00:00

Steering Group Strategic Decisions 2021

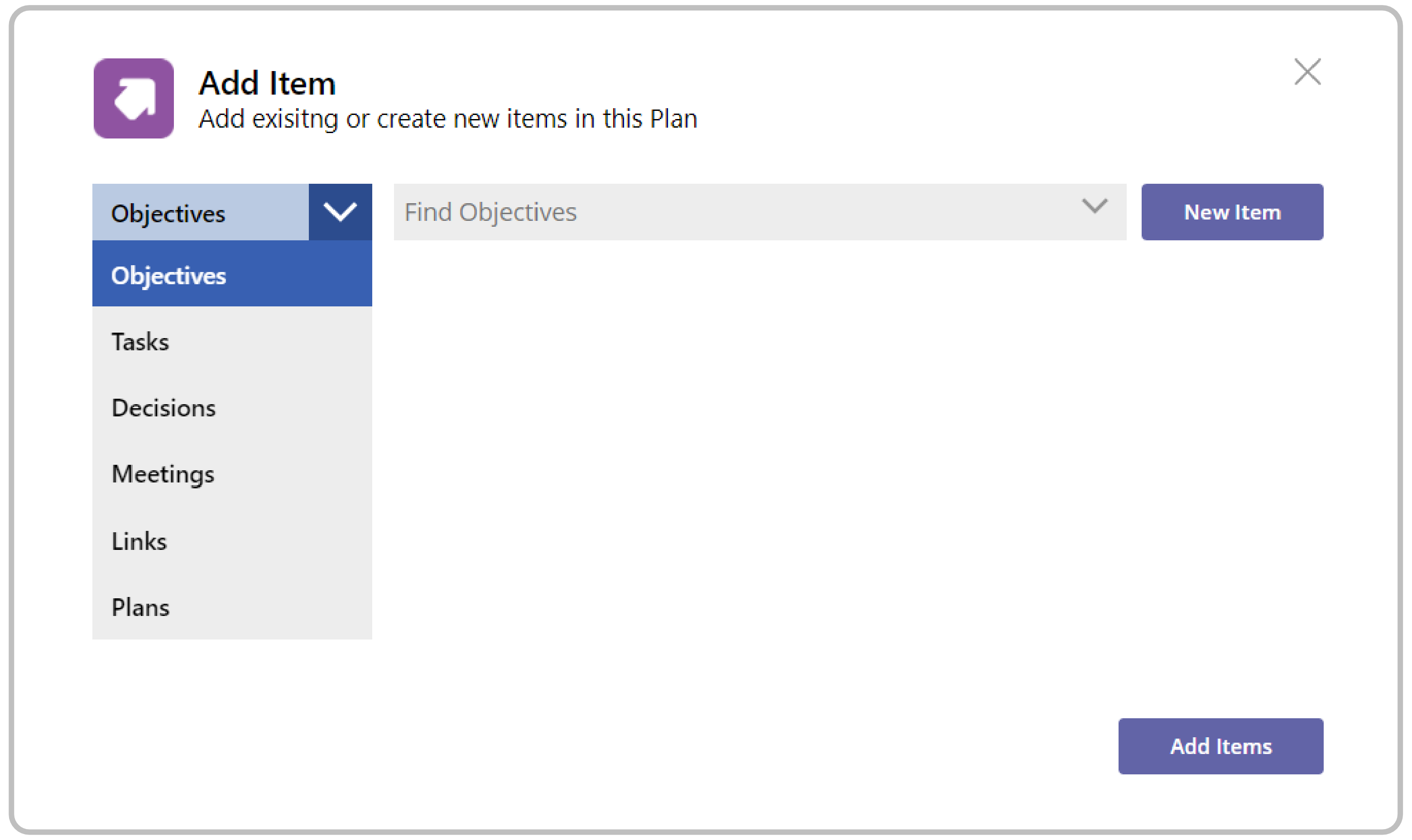
Not Started > In Progress > Completed

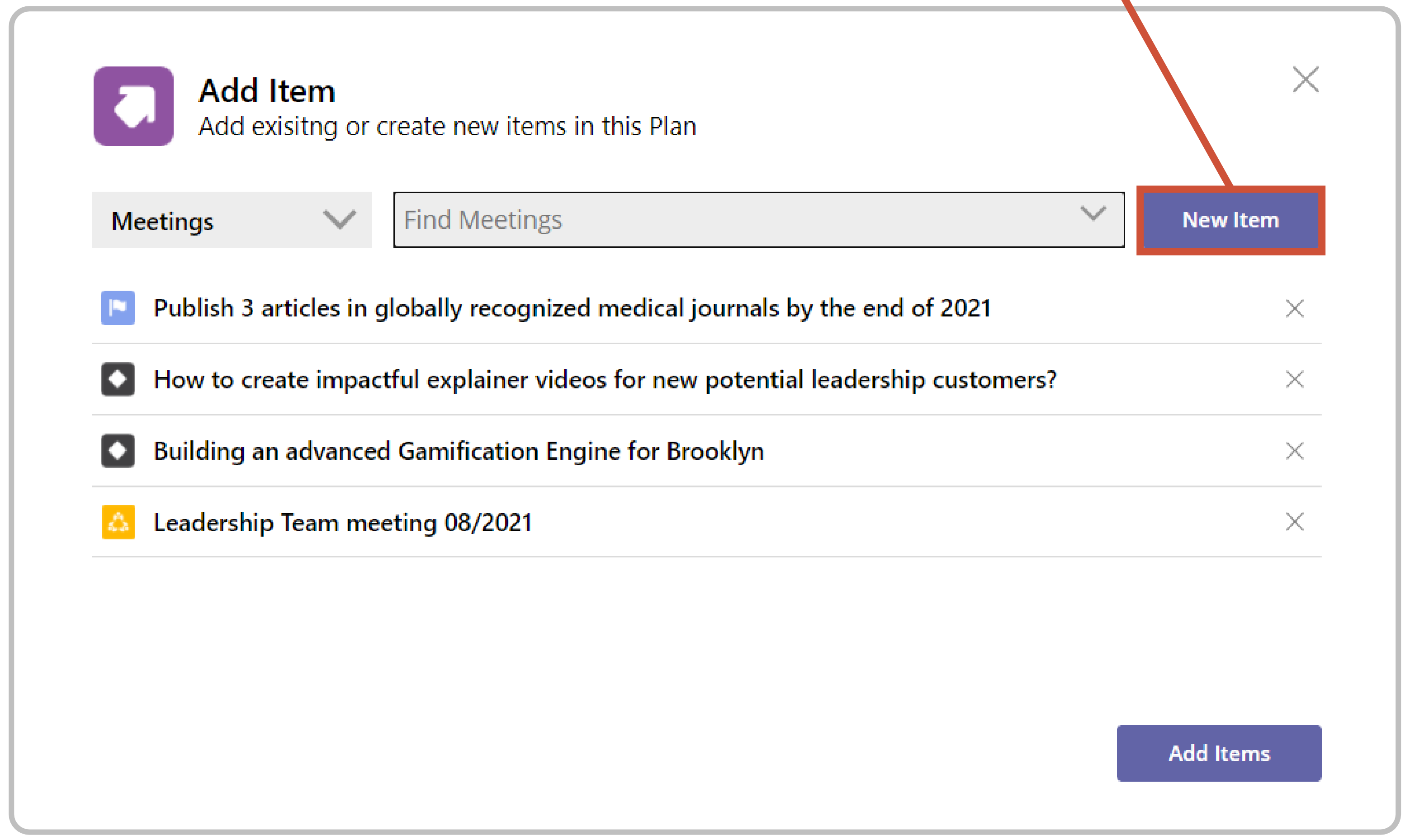
- The Plan life cycle consists of three phases:
  - Not started – The plan/project and item list are being prepared. The accountable invites the people, writes a descriptive title, sets a timeline, and invites the participants.
  - In Progress – Participants collaborate to make the decisions, complete the tasks and goals, and reach the plan/project targets transparently and visibly.
  - Completed – The plan/project is completed, or no more actions are taking place to further its progress. The

Add item popup



The add item popup enables adding new items to the plan.

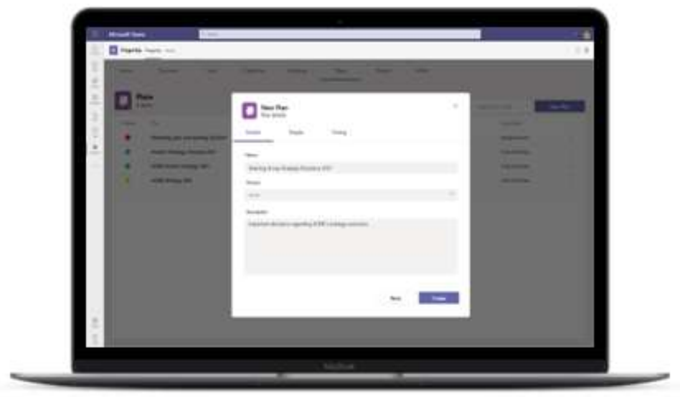




1. Select an item type
2. Find items with search queries or browse recent items of the selected type
3. Alternatively you can press the “New Item” button to create any new item and add it to the plan

FINGERTIP

Step-by-step guides [PLANS]

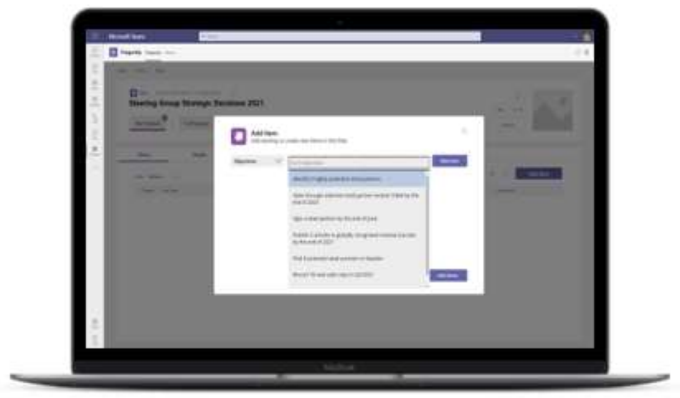


How to create
a new plan

FINGERTIP

How to create
new items to a plan

FINGERTIP



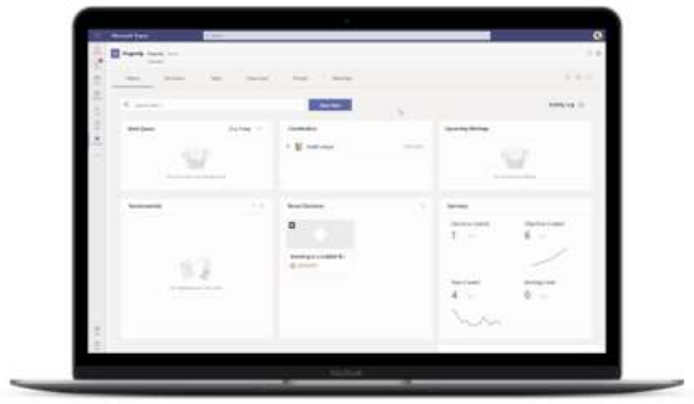
How to add
existing items to a plan

FINGERTIP

FINGERTIP

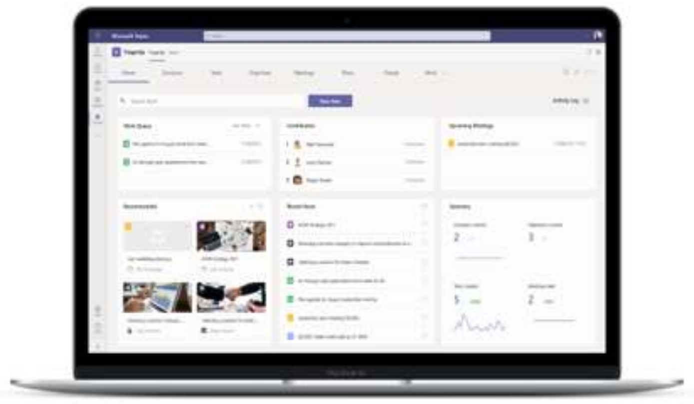
Step-by-step guides

Step-by-Step Guides [GENERAL]



How to add Fingertip to your Microsoft Teams interface

FINGERTIP.



Using the Fingertip Home Page

FINGERTIP.

FINGERTIP.

Step-by-step guides [DECISIONS]

How to create a decision

FINGERTIP

How to propose a decision

FINGERTIP

How to give a stance to a decision

FINGERTIP

How to approve a decision

FINGERTIP

How to create an approval

FINGERTIP

How to manage tasks in a decision

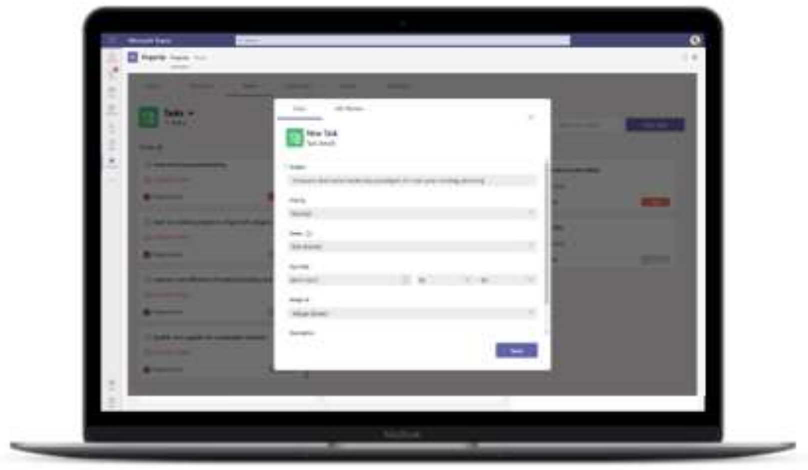
FINGERTIP

How to manage objectives in a decision

FINGERTIP

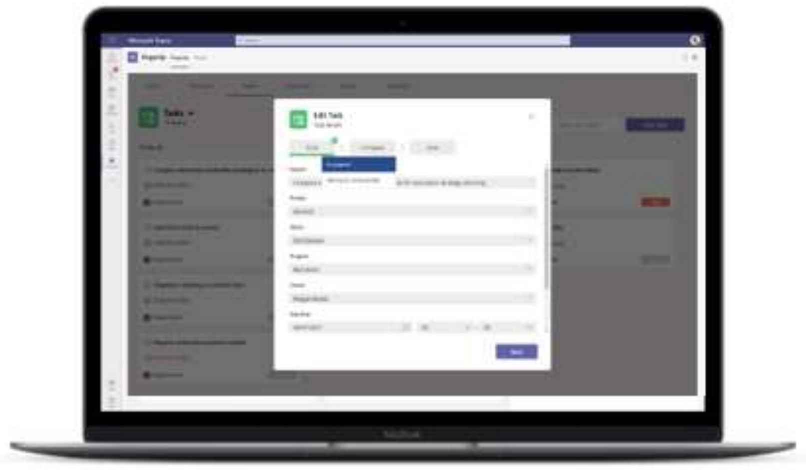
FINGERTIP

Step-by-step guides [TASKS]



How to create
a task

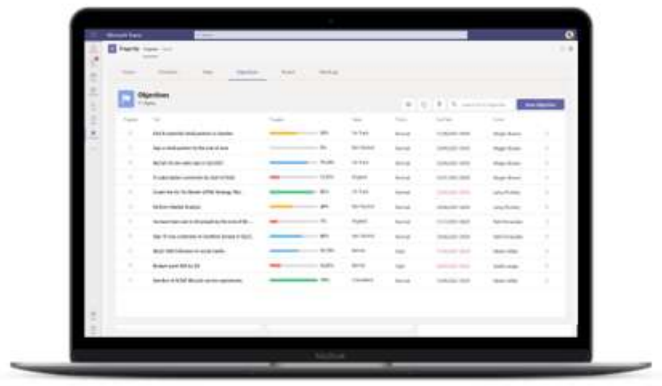
130



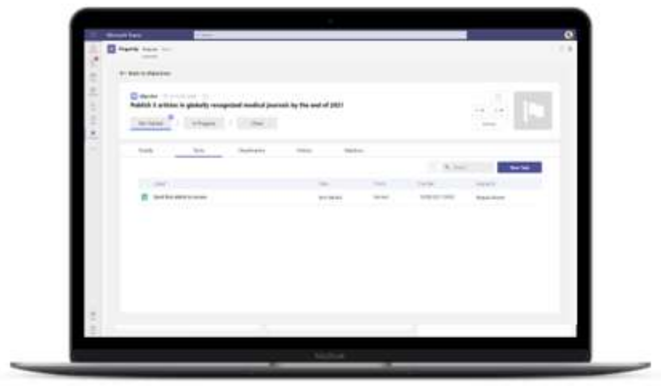
How to update
a task

133

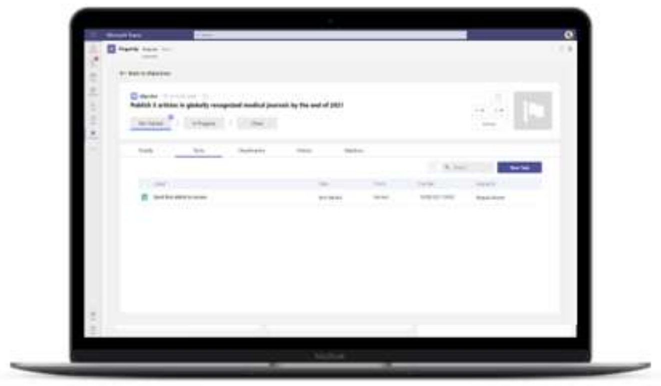
Step-by-step guides [OBJECTIVES]



How to create an objective

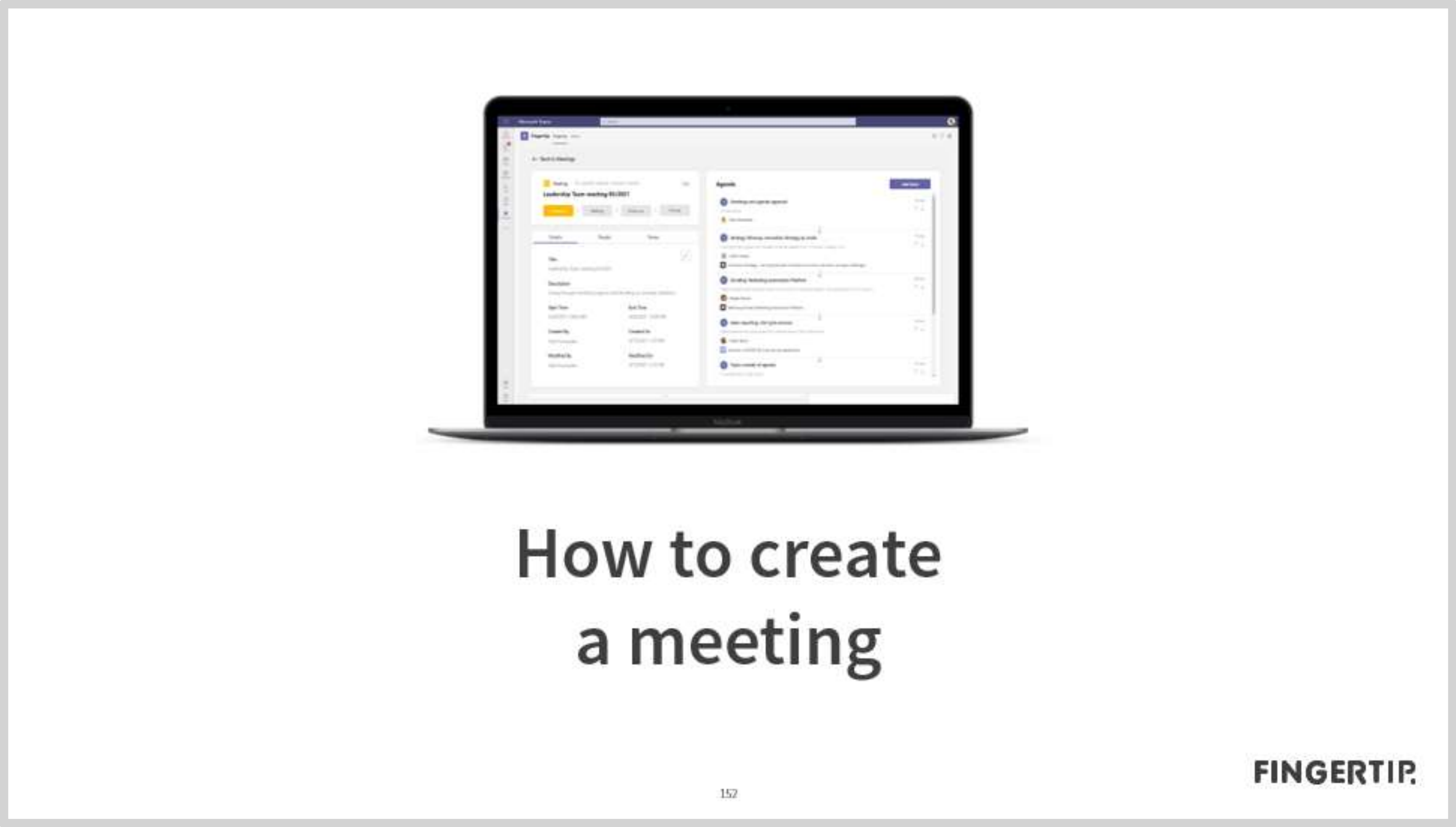


How to manage tasks in an objective

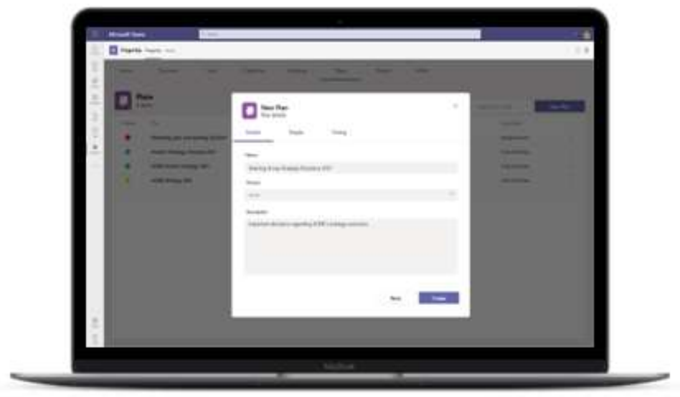


How to use key results for an objective

Step-by-step guides [MEETINGS]



Step-by-step guides [PLANS]

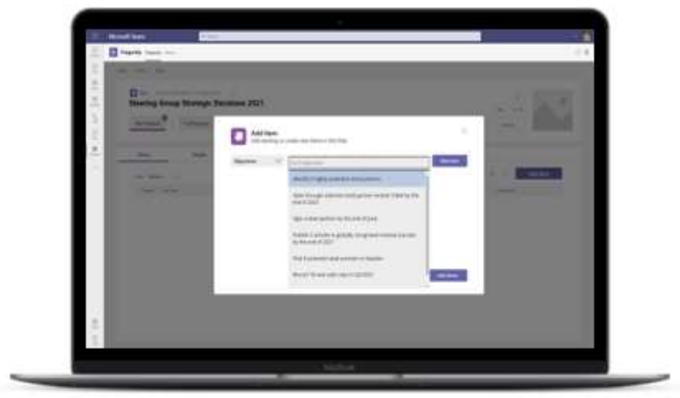


How to create
a new plan

160

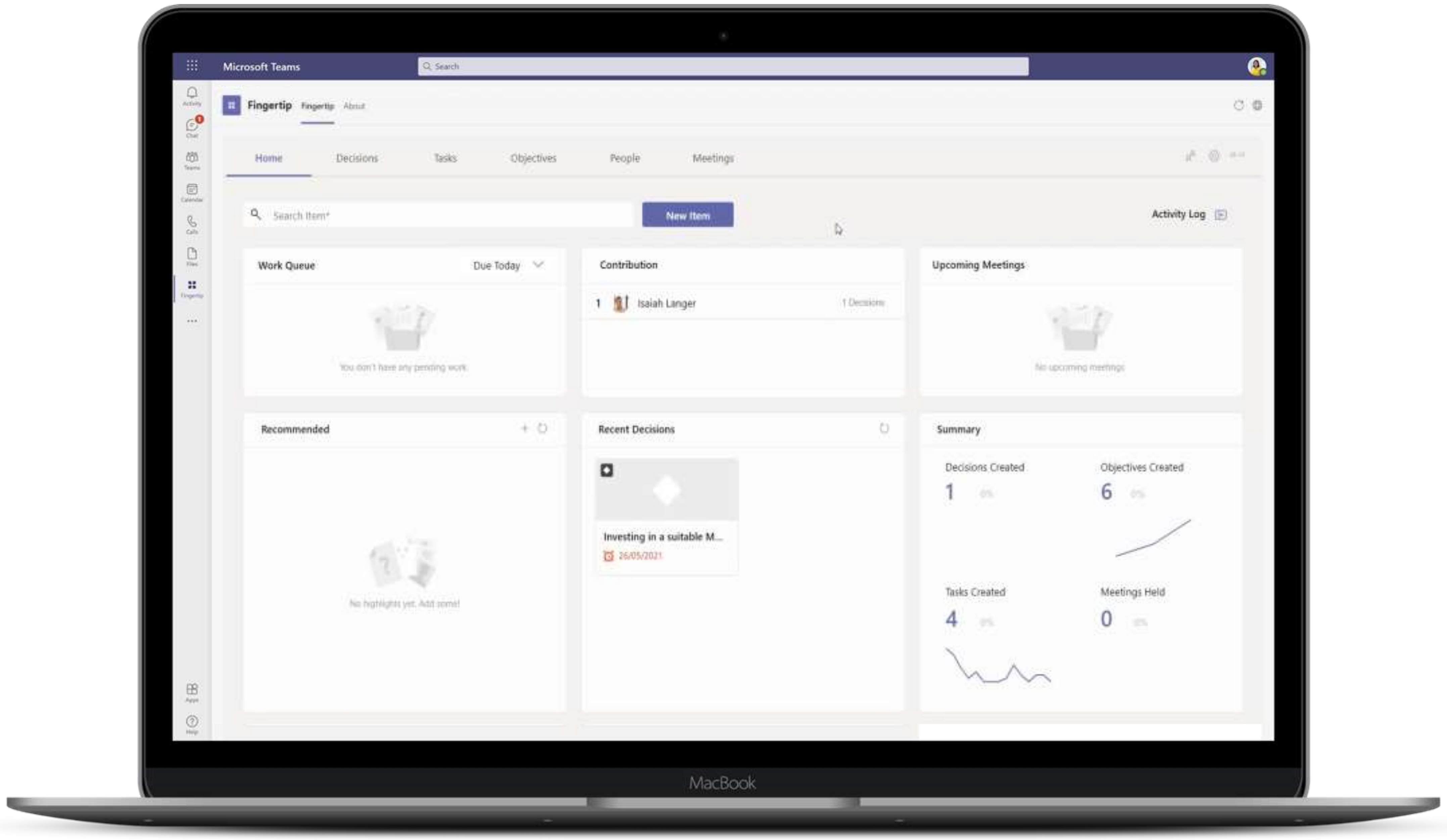
How to create
new items to a plan

172



How to add
existing items to a plan

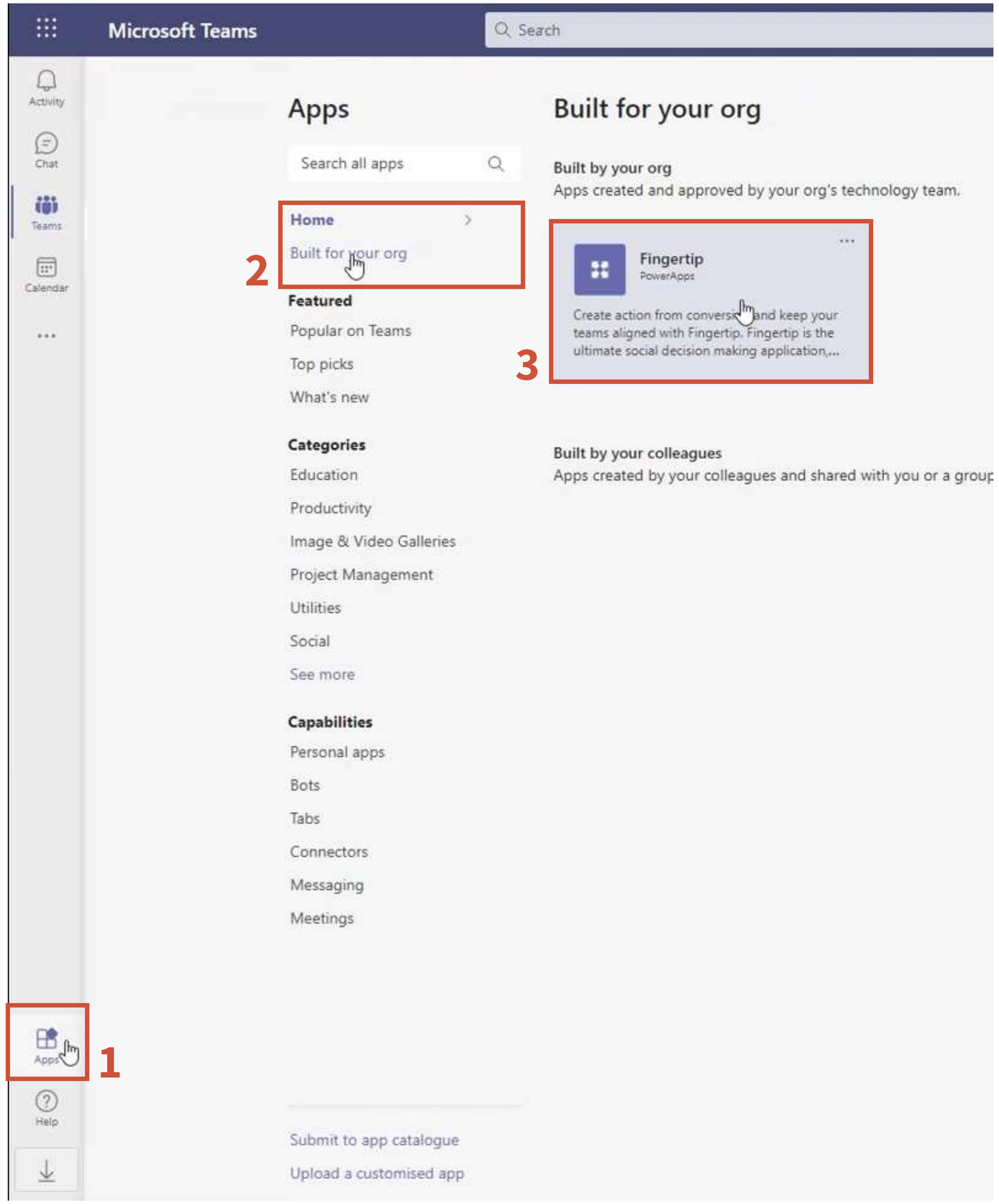
166



How to add Fingertip to your Microsoft Teams interface

FINGERTIP

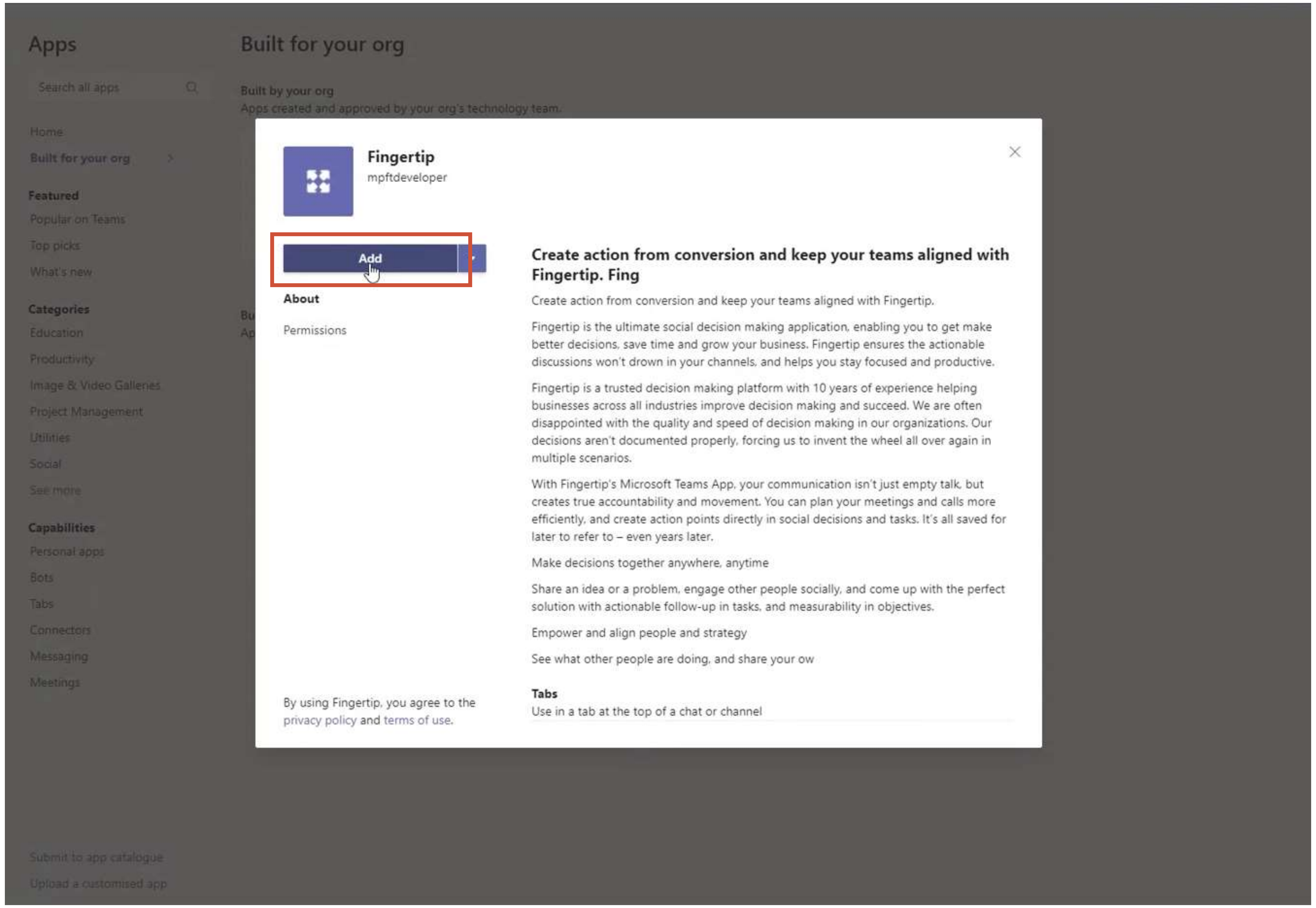
How to add Fingertip to your Microsoft Teams interface



1. Start by clicking the apps portal on the bottom-left of your Teams interface
2. Select "Built for your org" to see all the applications enabled for your organization
3. Open Fingertip from the list

FINGERTIP

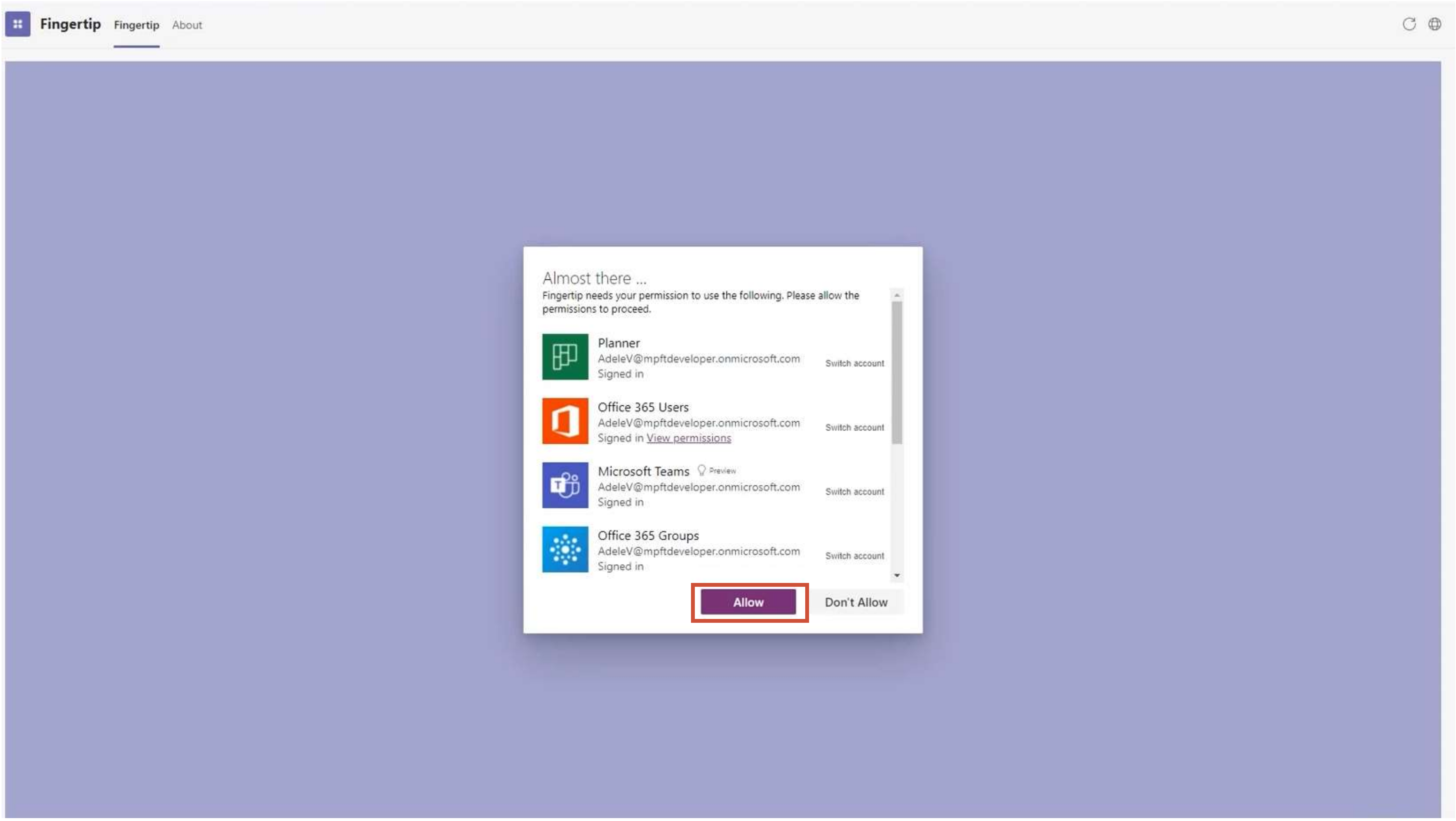
How to add Fingertip to your Microsoft Teams interface



4. Select ”Add”, if you are opening Fingertip for the first time
This should say ”Open”, if you’ve opened Fingertip earlier

FINGERTIP

How to add Fingertip to your Microsoft Teams interface



11. You need to allow Fingertip access to other Microsoft programs or it won’t work properly. Click ”Allow”.

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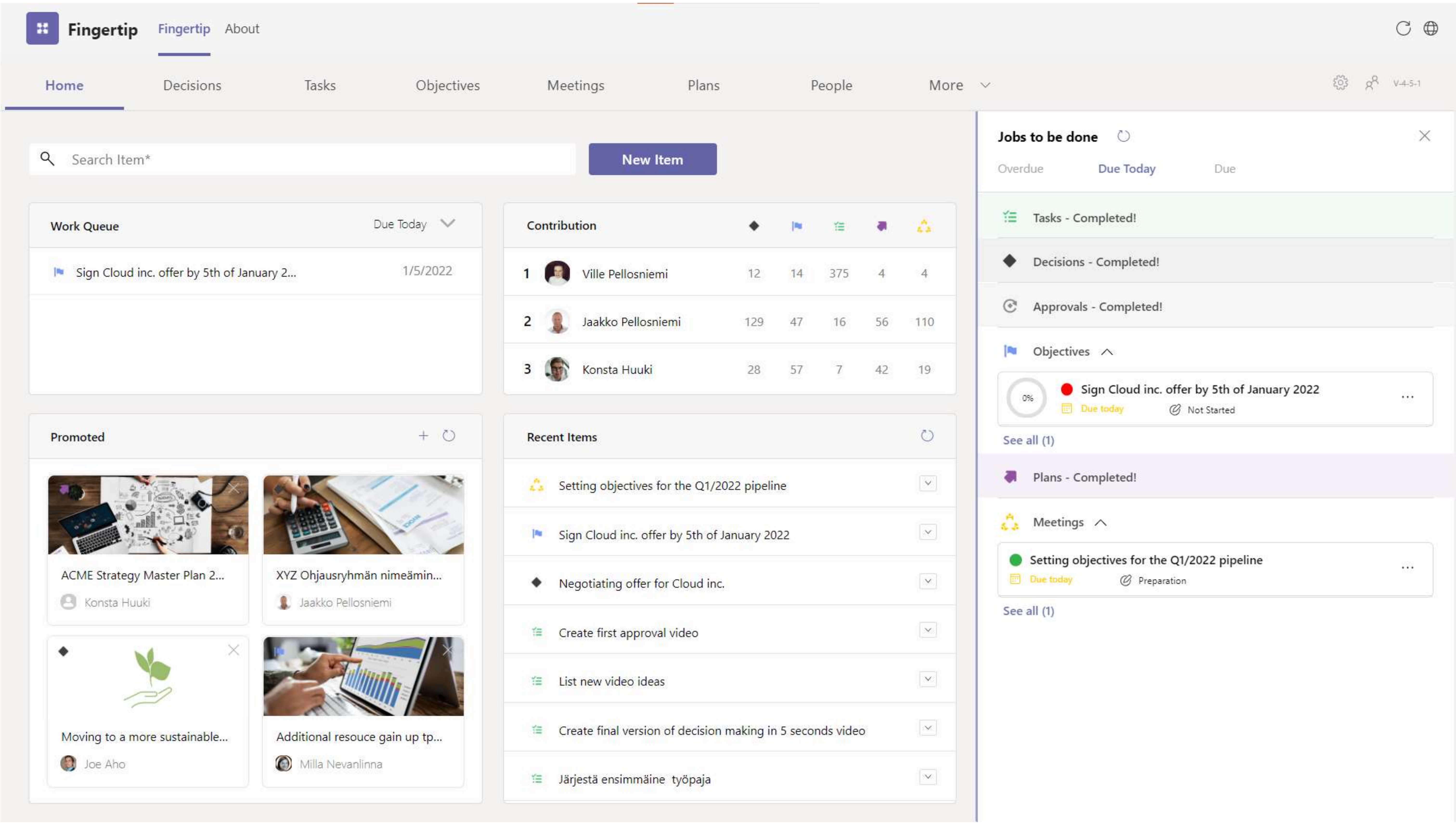
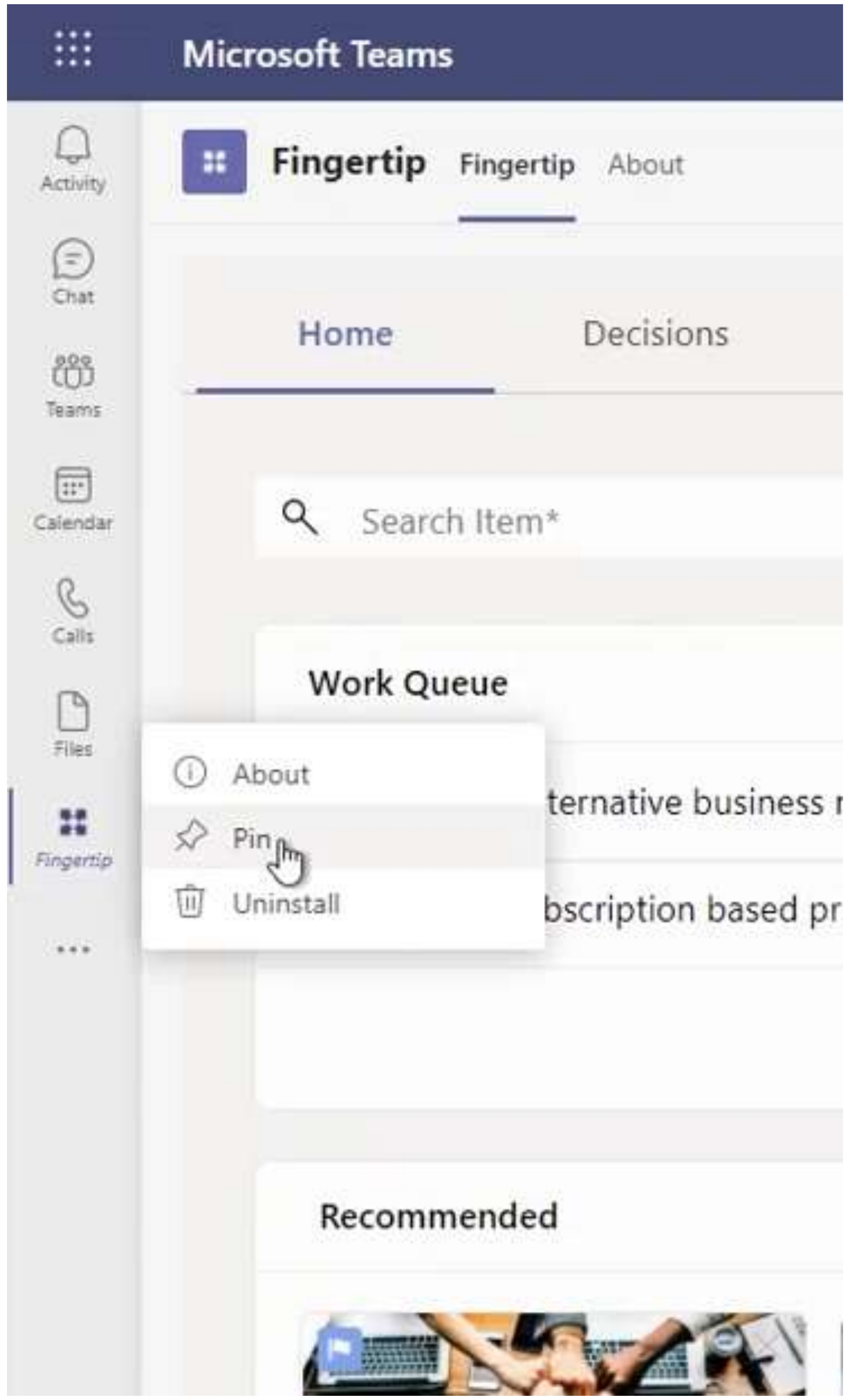
How to add Fingertip to your Microsoft Teams interface



12. Success! After a loading screen, you will be redirected to your Fingertip front page. Be patient, the first load may take up to a minute.

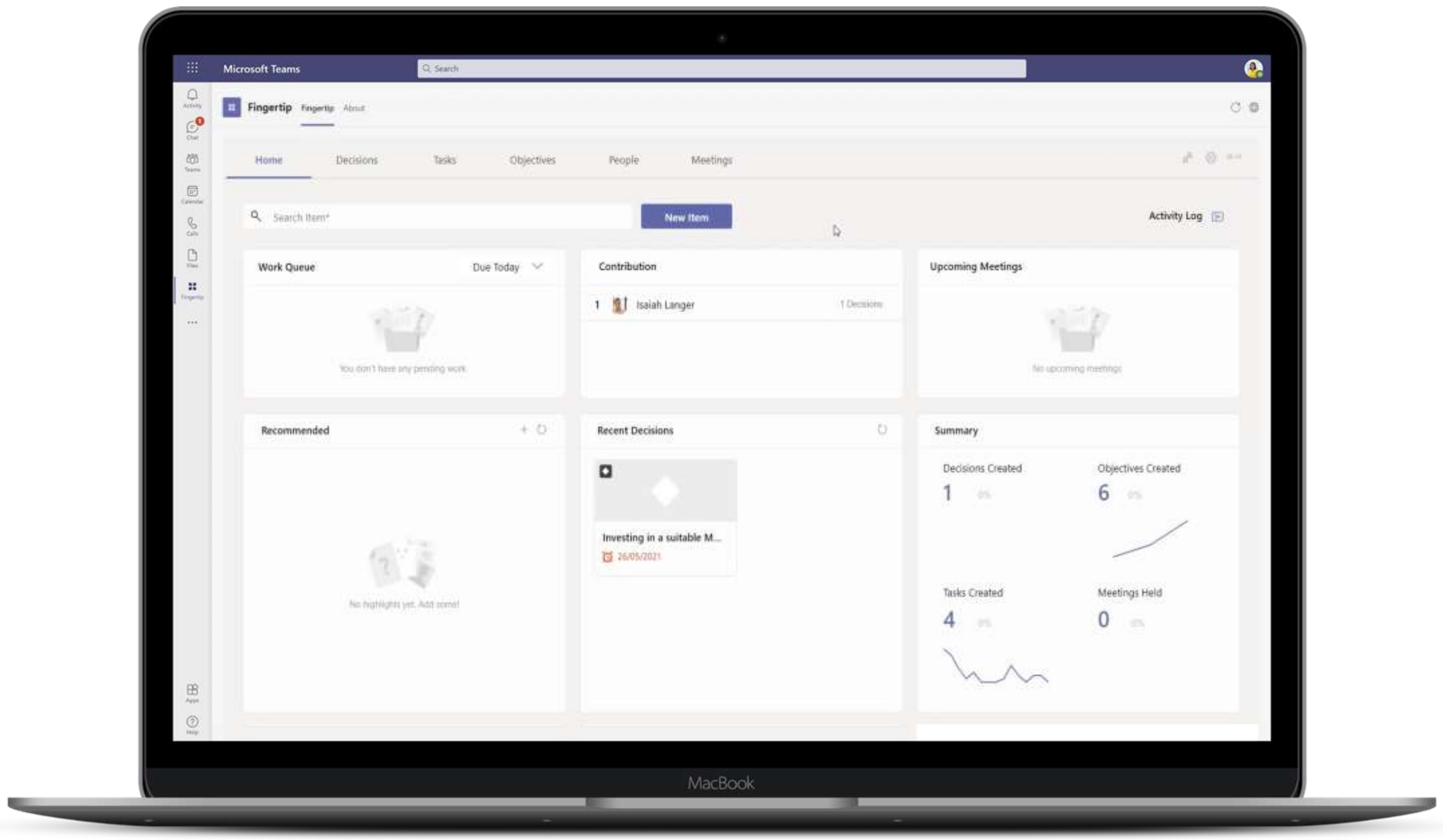
Using the Fingertip Home Page



Before anything else, we suggest you pin Fingertip to your Teams interface by

1. Right click on the Fingertip icon
2. Select ”Pin” from the popup menu

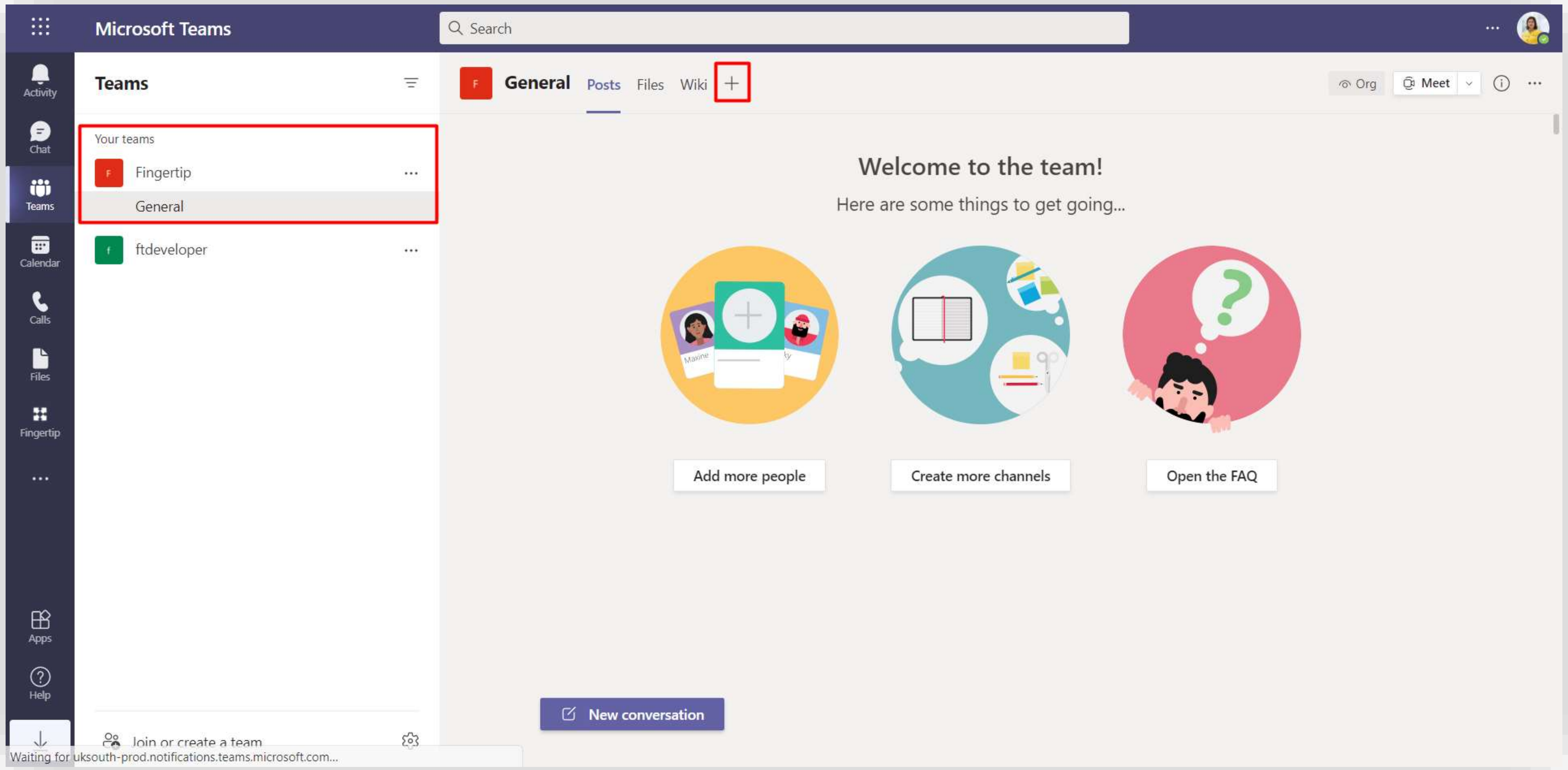
Note: If the menu says ”Unpin”, Fingertip has already been pinned.



How to add Fingertip to a Teams channel as a tab

FINGERTIP

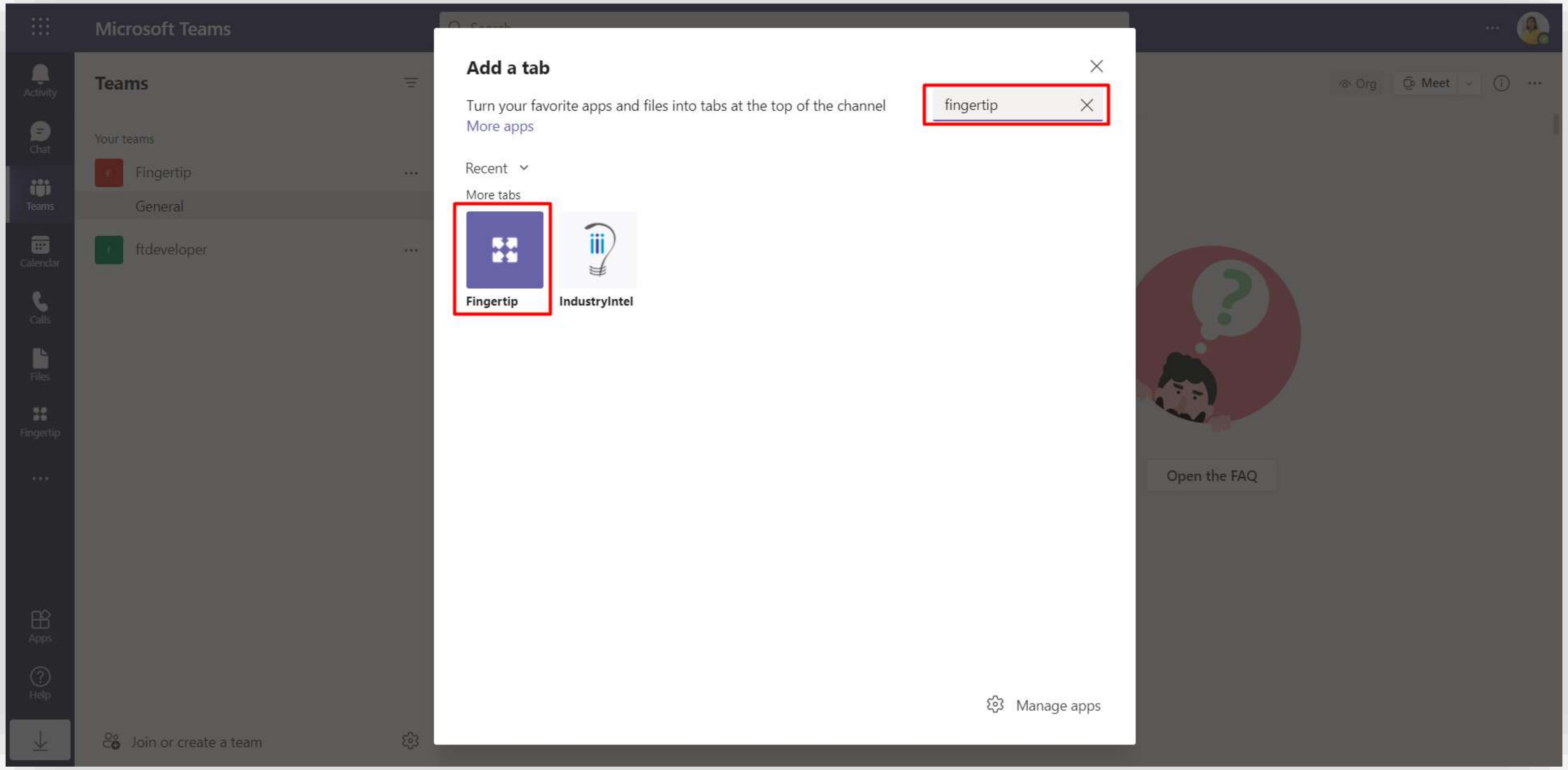
Adding the app as a tab in channel



Let's install Fingertip as a part of a Teams channel now!

1. Locate a team and a channel where you want to place the application.
2. Click on the "+" –icon in the channel as shown in the picture.

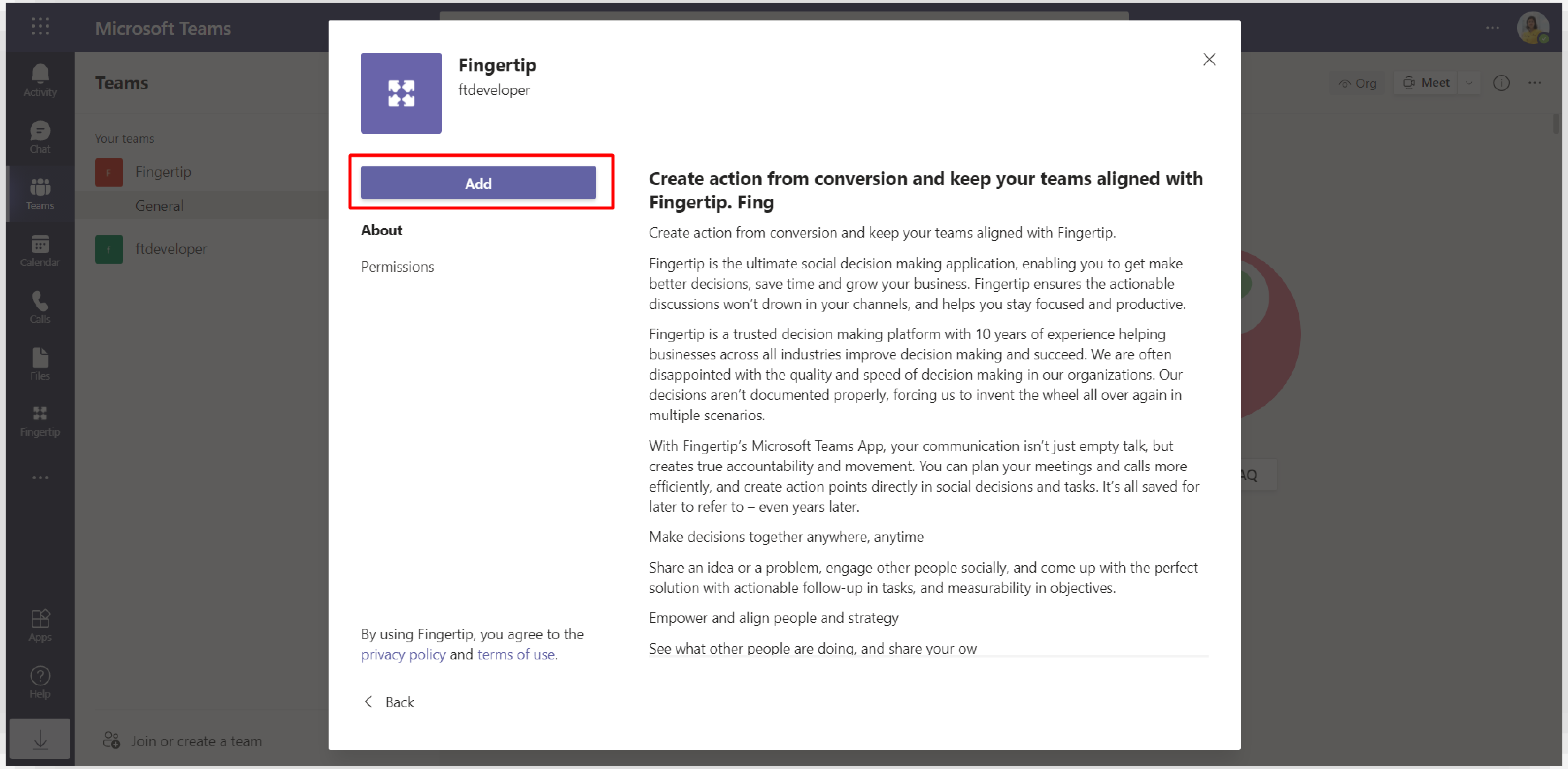
Adding the app as a tab in channel



1. Search for “Fingertip” in the top-right corner of the popup.
2. Click on the Fingertip application icon.

FINGERTIP

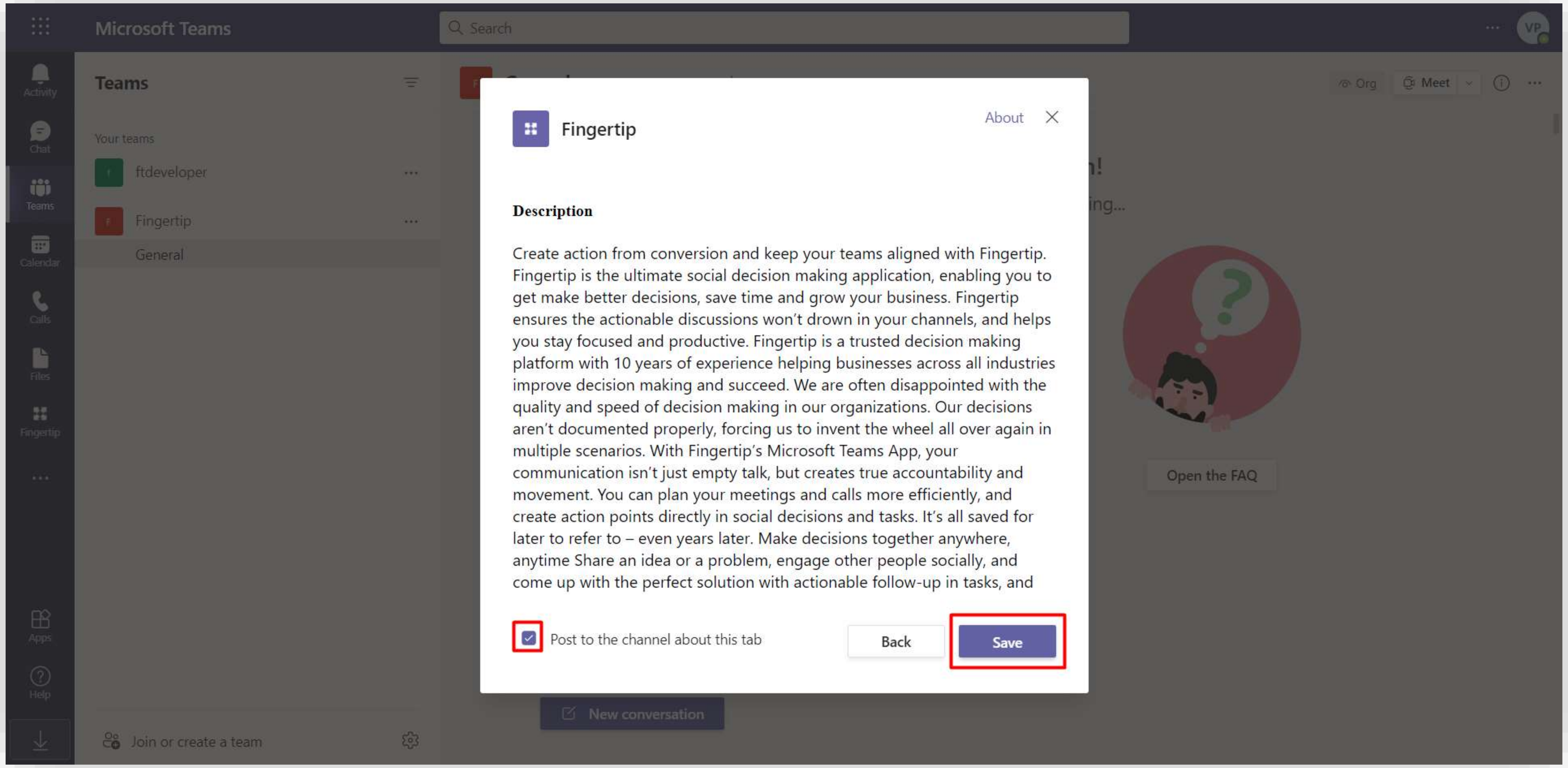
Adding the app as a tab in channel



1. In the new popup, select “Add”.

FINGERTIP

Adding the app as a tab in channel

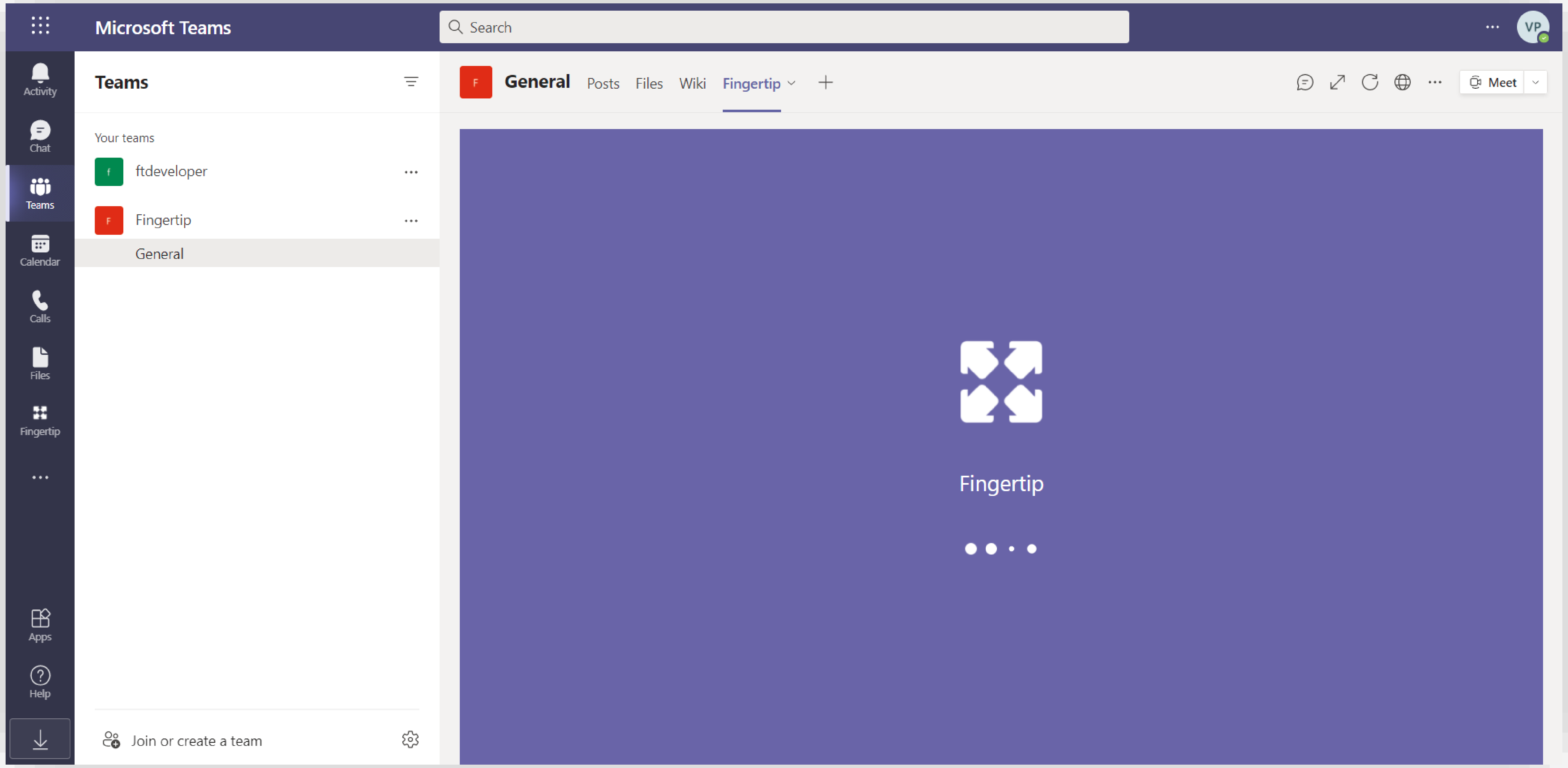


Here you can review the app you are about to add.

1. (Optional) Check the checkbox if you want to post the channel about this tab
2. Click “Save”.

FINGERTIP

Adding the app as a tab in channel

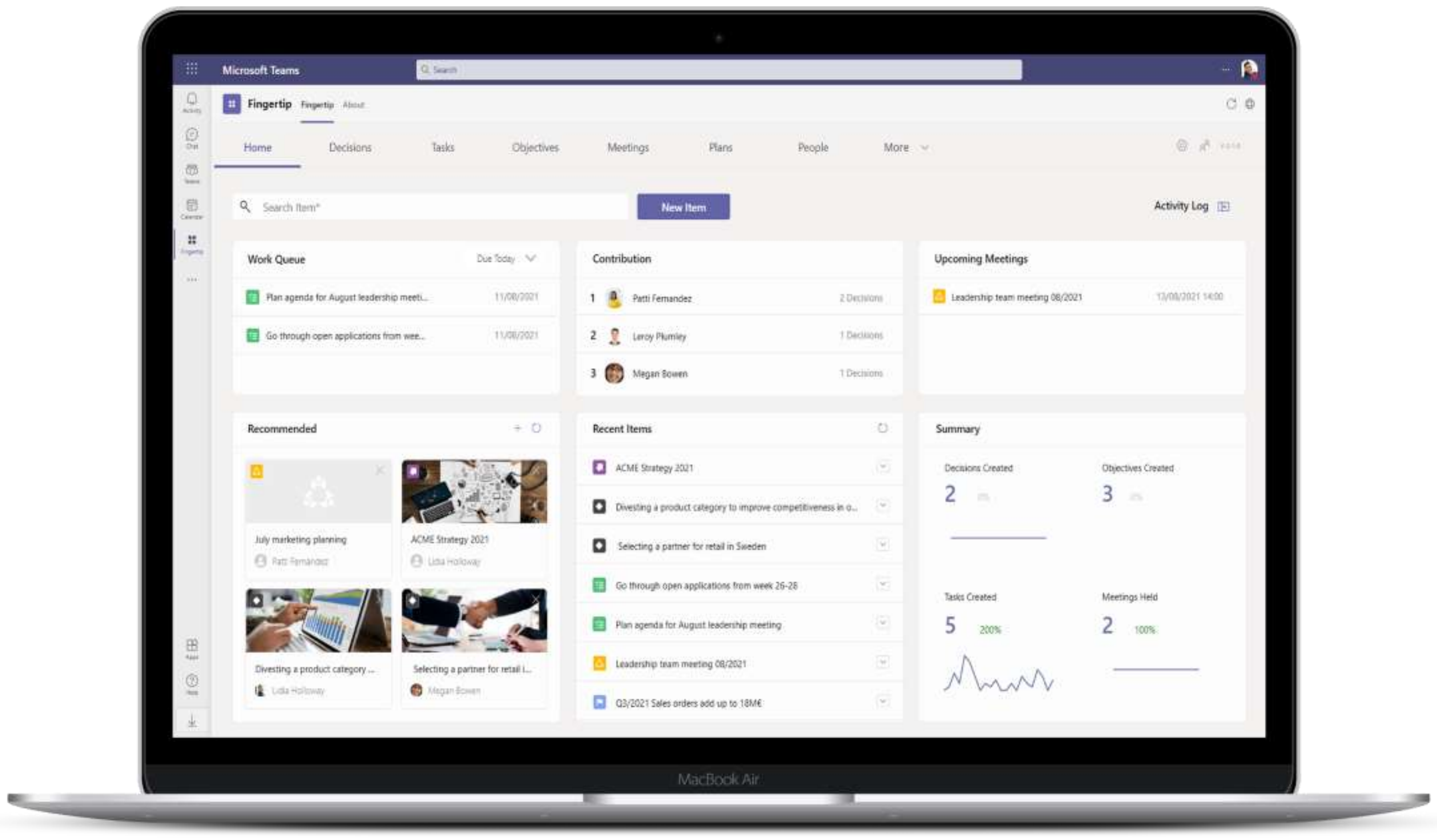


Here you can review the app you are about to add.

1. (Optional) Check the checkbox if you want to post the channel about this tab
2. Click “Save”.

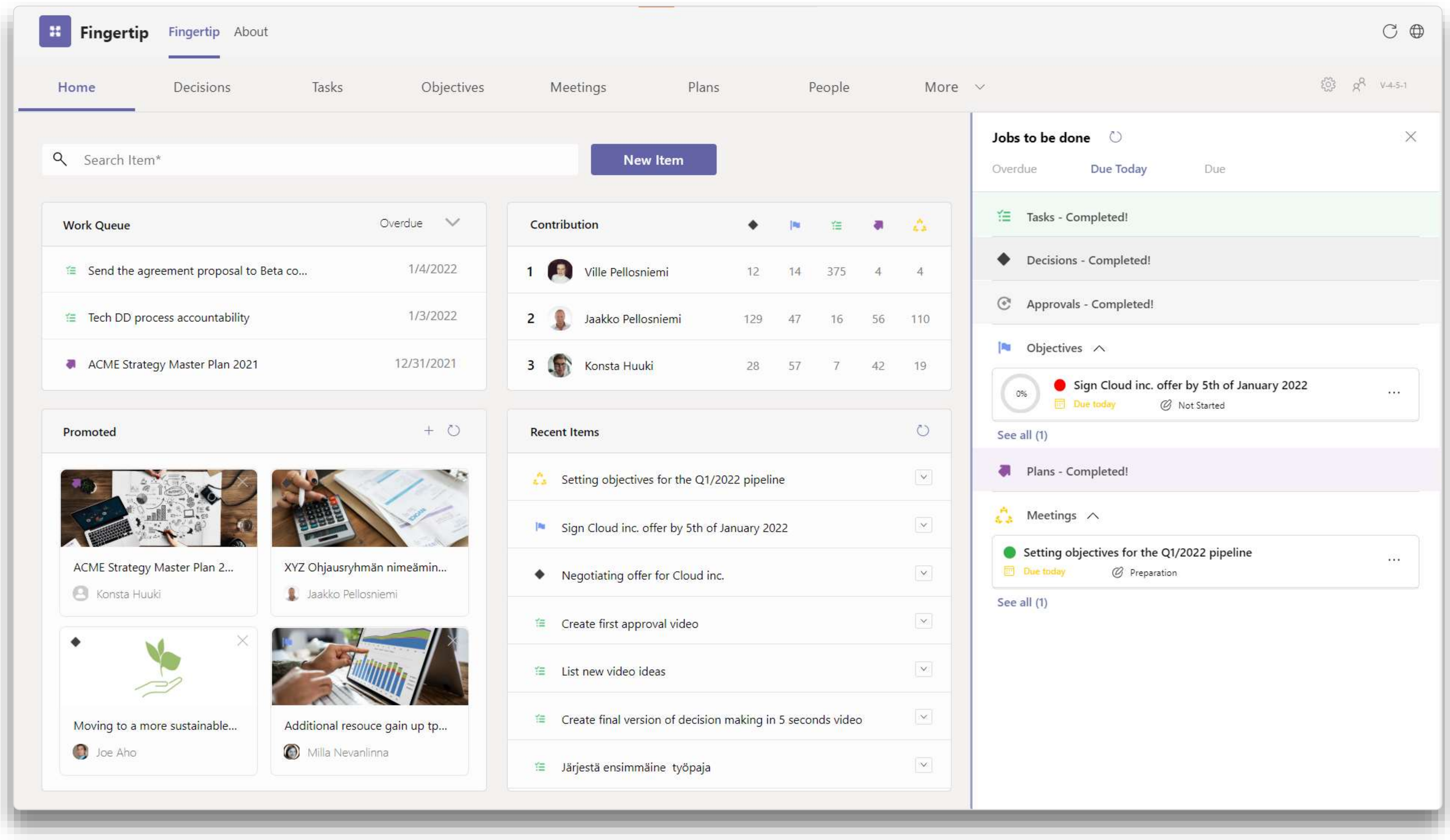
You have now added Fingertip as a tab for the entire team! Make sure that everyone in the team has access to the application and follow the instructions in the following slides of how to open the app for the first time.

FINGERTIP



Using the Fingertip Home Page

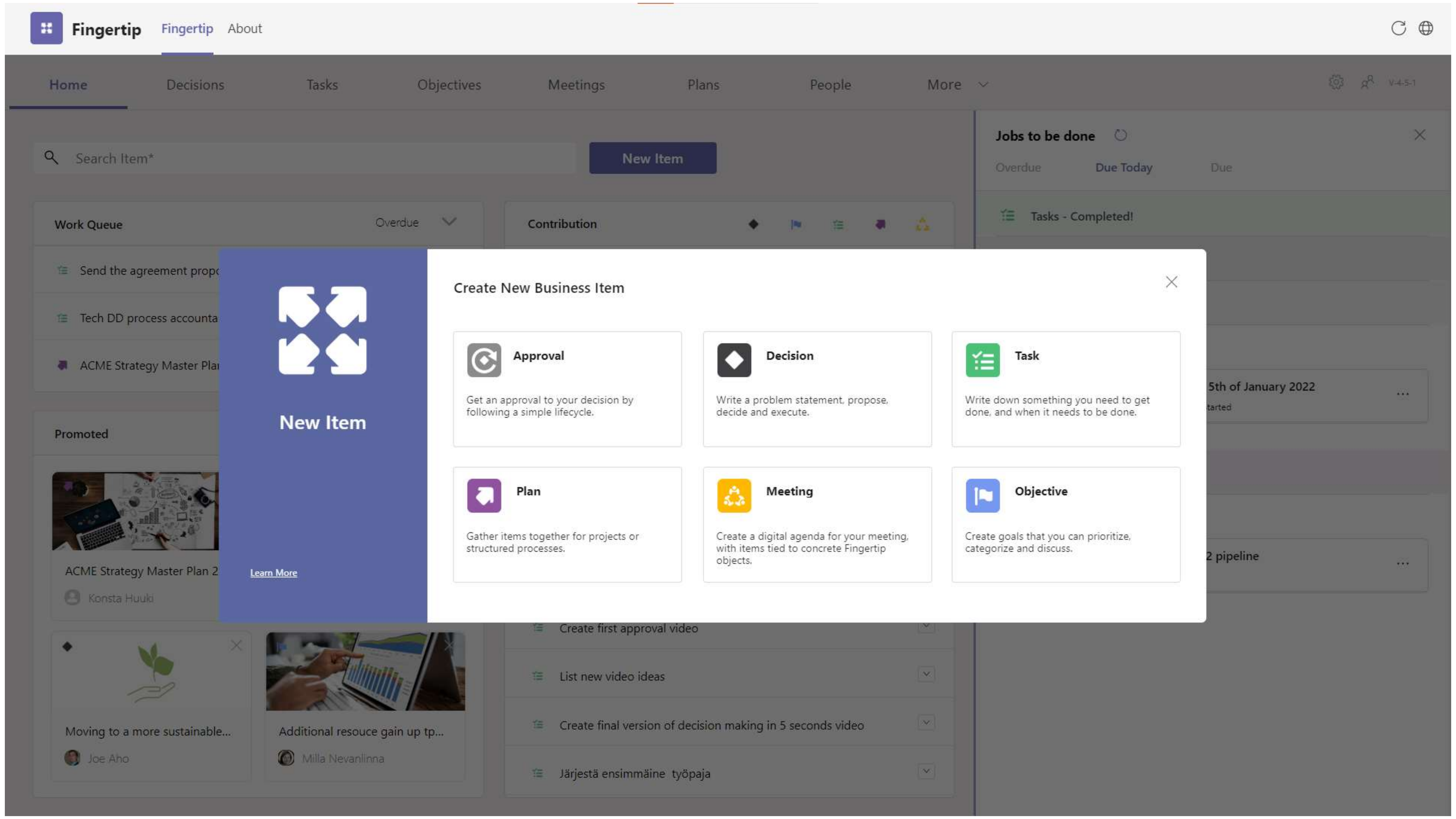
Using the Fingertip Home Page



This is the Fingertip home page, starting point for your daily work.

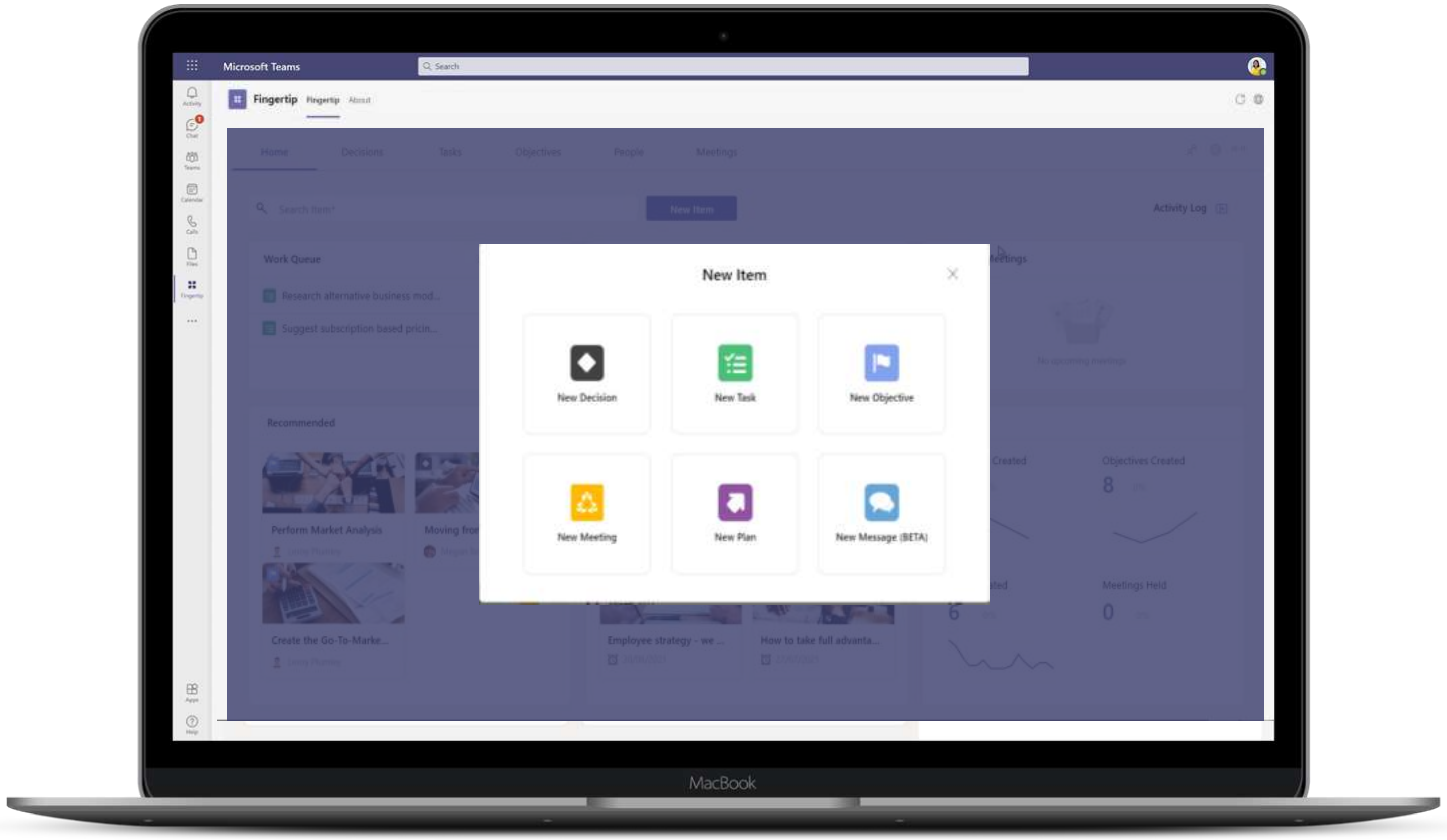
See your upcoming tasks, recently edited items, items recommended by others, contribution by team members and jobs to be done.

Using the Fingertip Home Page



The New Item popup is perhaps the fastest way to get the ball rolling. Create new decisions, tasks, objectives or meetings transparently, and start collaborating!

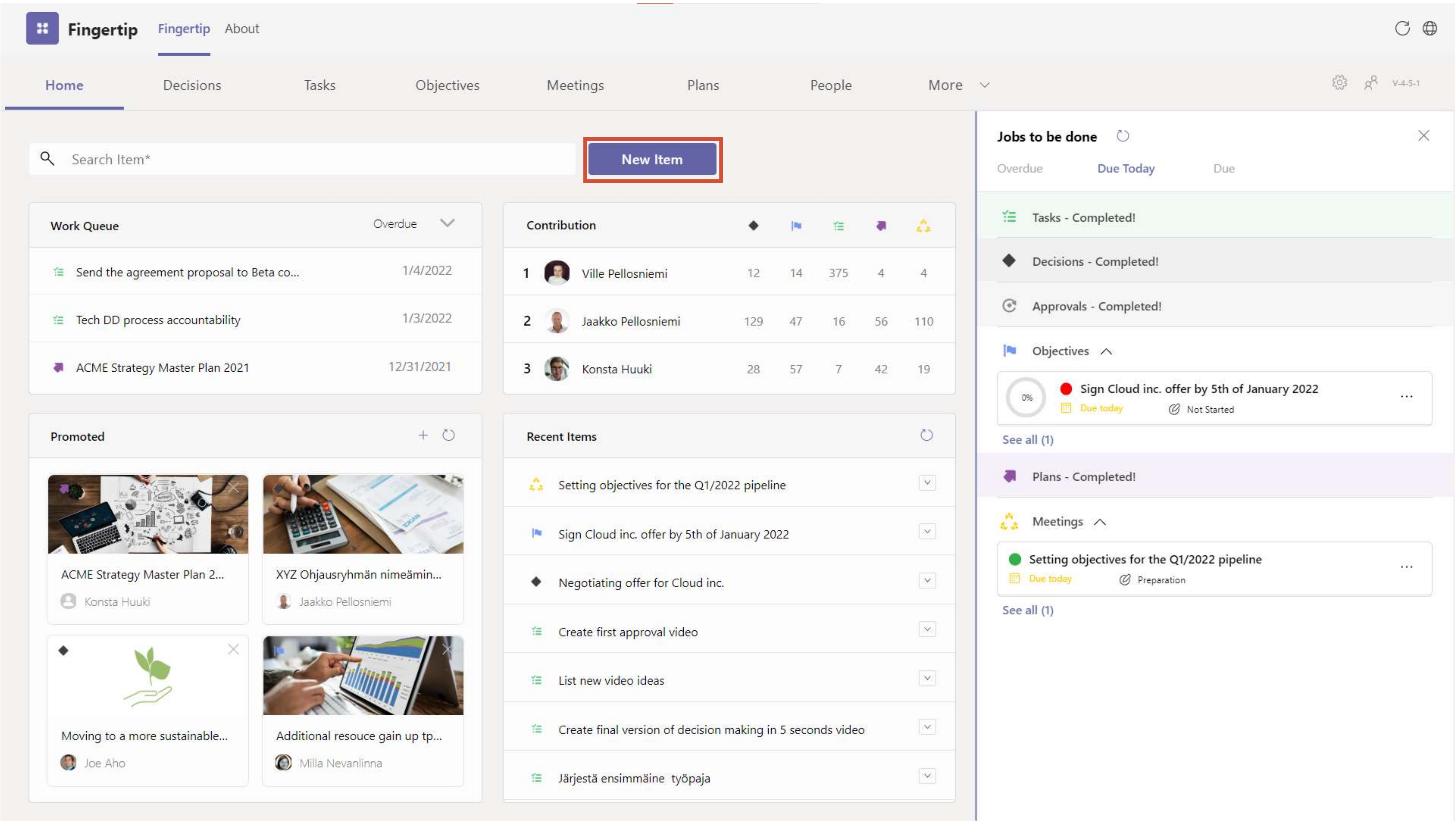
FINGERTIP



How to create a decision

FINGERTIP

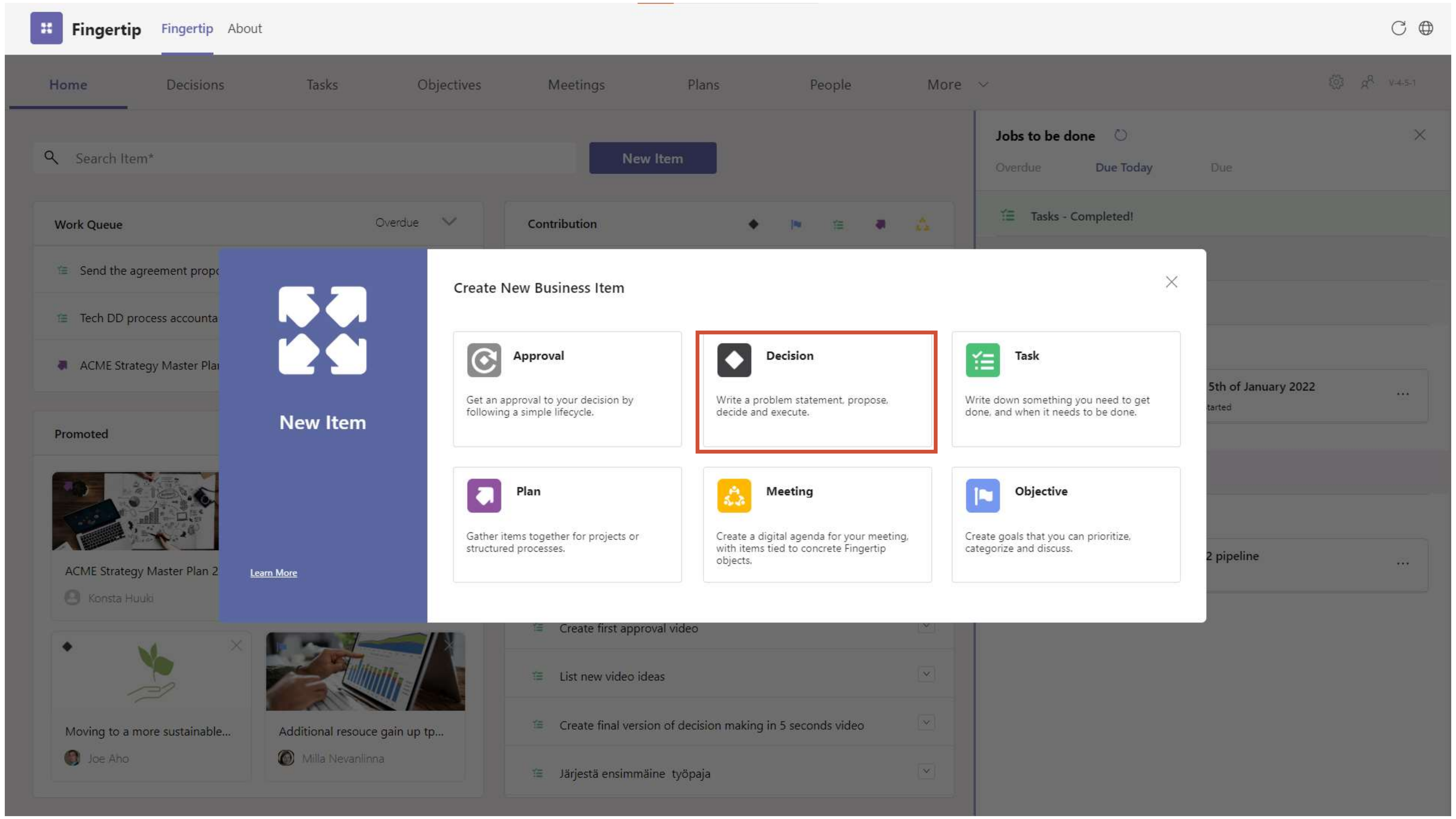
How to create a decision



1. There are a few places you can start a decision from in Fingertip, but the easiest should be from the front page. Click on the ”New item” button

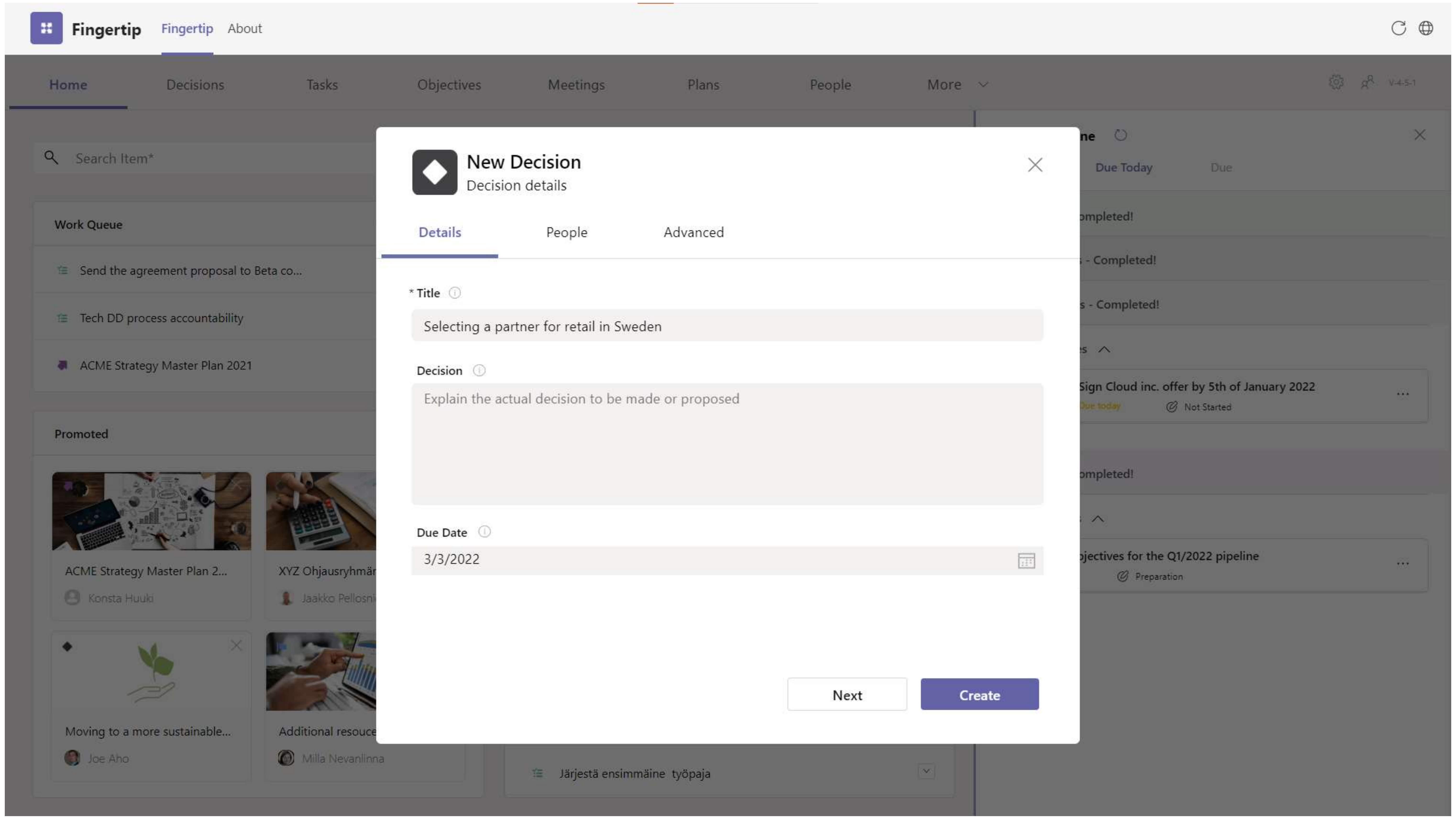
FINGERTIP

How to create a decision



2. Select ”New Decision”

How to create a decision

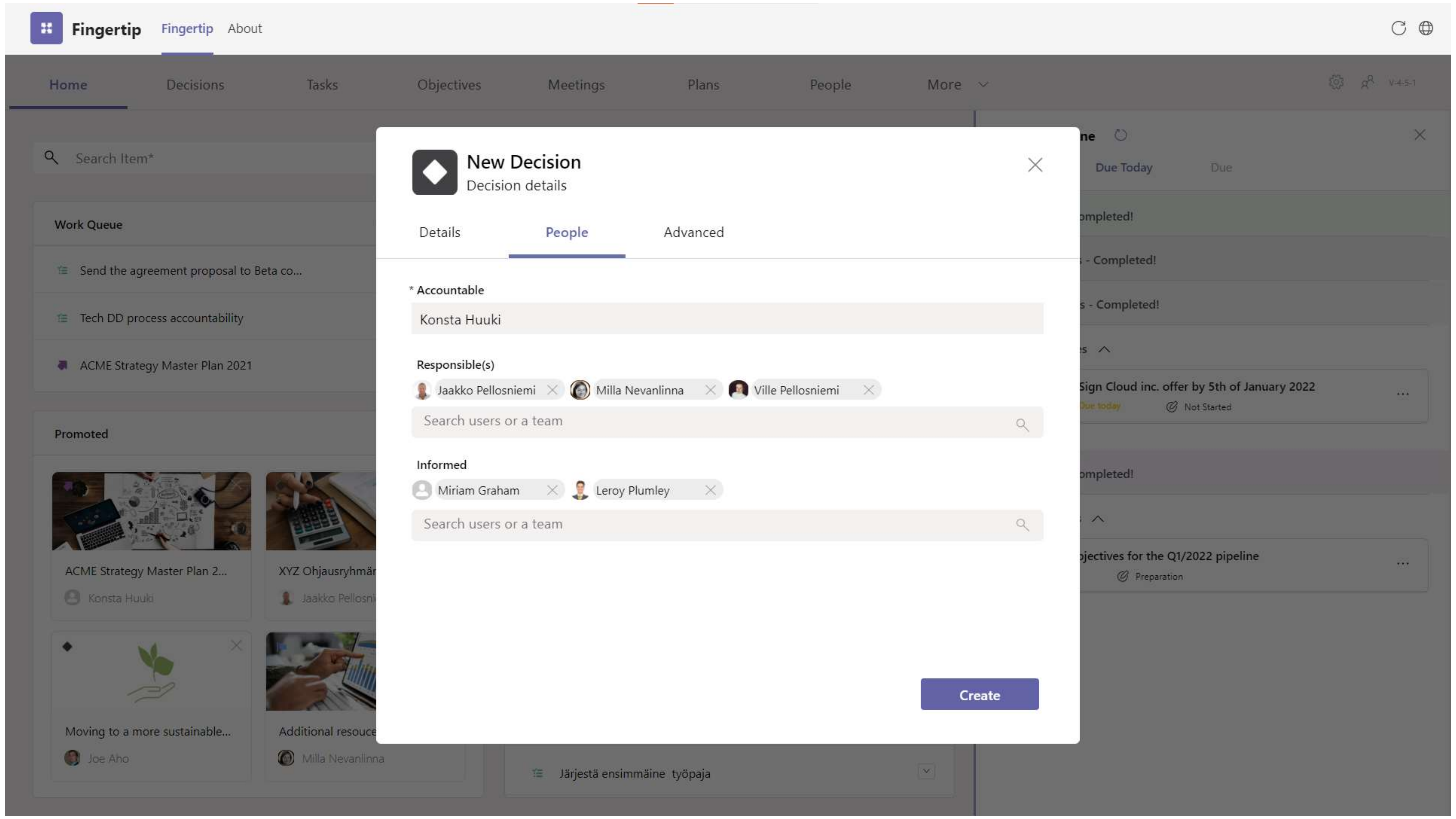


3. Insert your decision details and select a due date

4. Click ”Next” or ”People” to invite people to collaborate

FINGERTIP

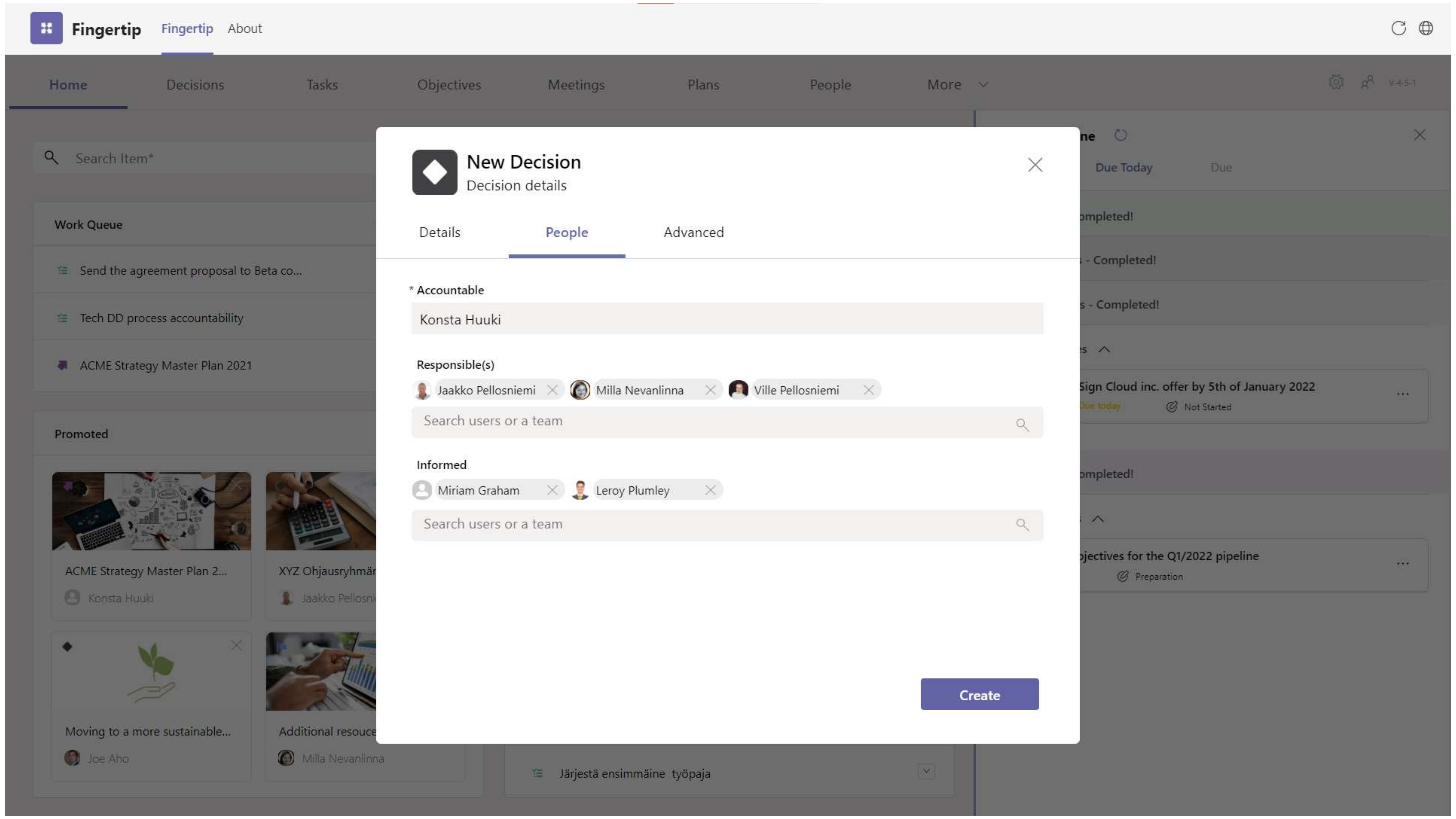
How to create a decision



5. Select the collaborators you want to join in the decision as responsible or informed.

FINGERTIP

How to create a decision



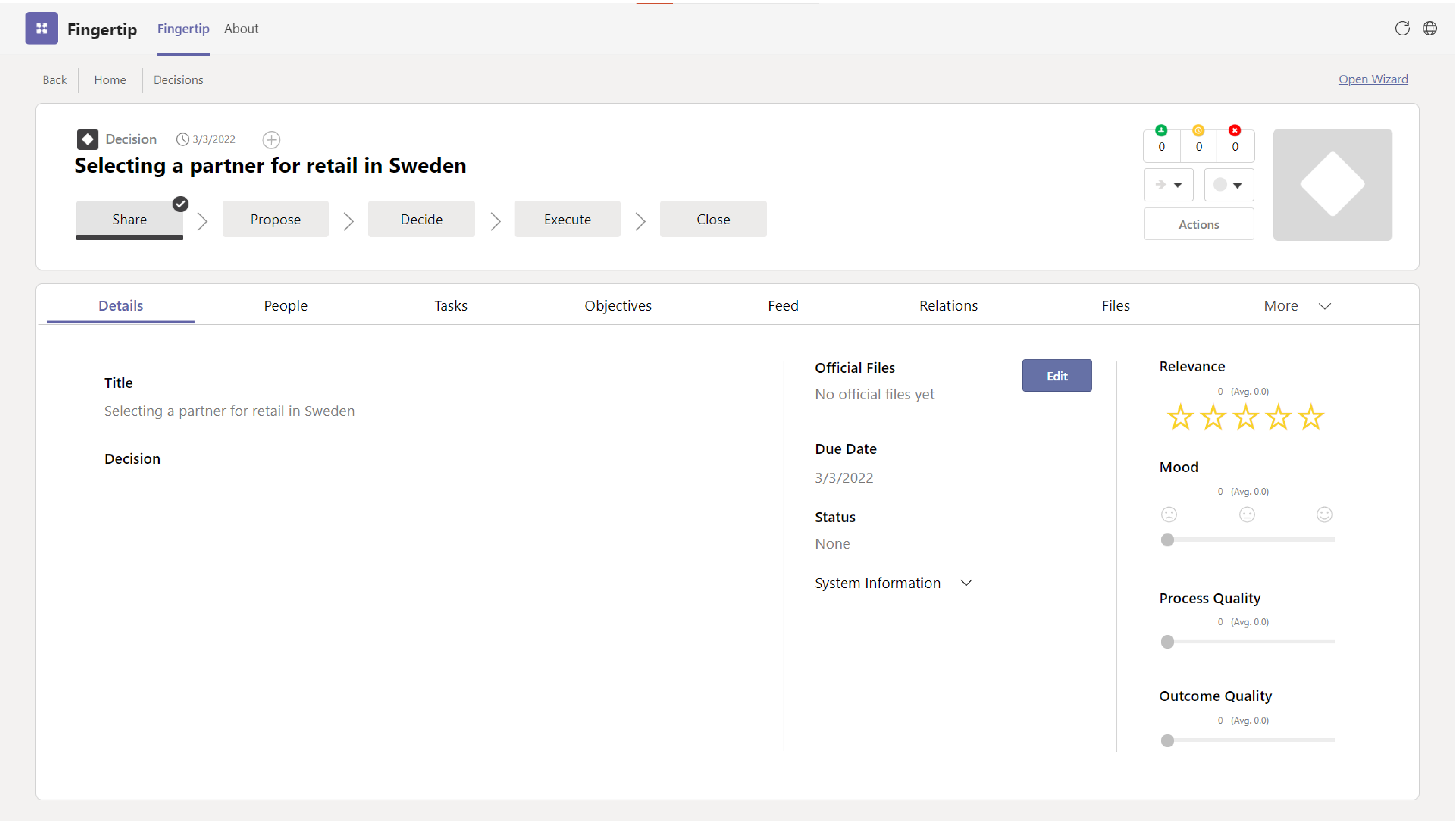
5. Select the collaborators you want to join in the decision as responsible or informed.

6. Click Create to share the decision.

OPTIONAL: You can add the decision to a Plan upon creation on the Advanced tab

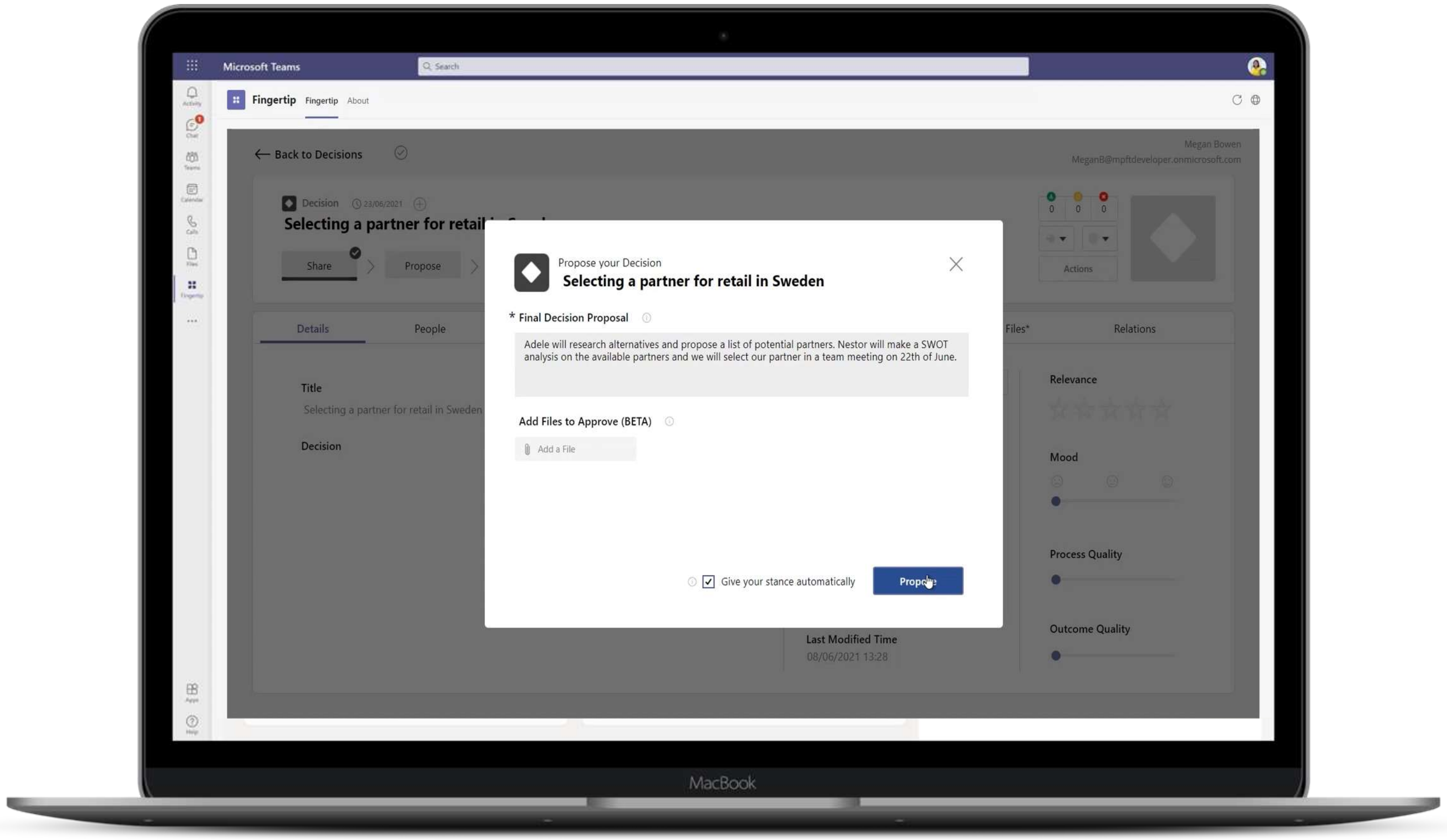
FINGERTIP

How to create a decision



7. Done! You’re decision has been shared to the participants

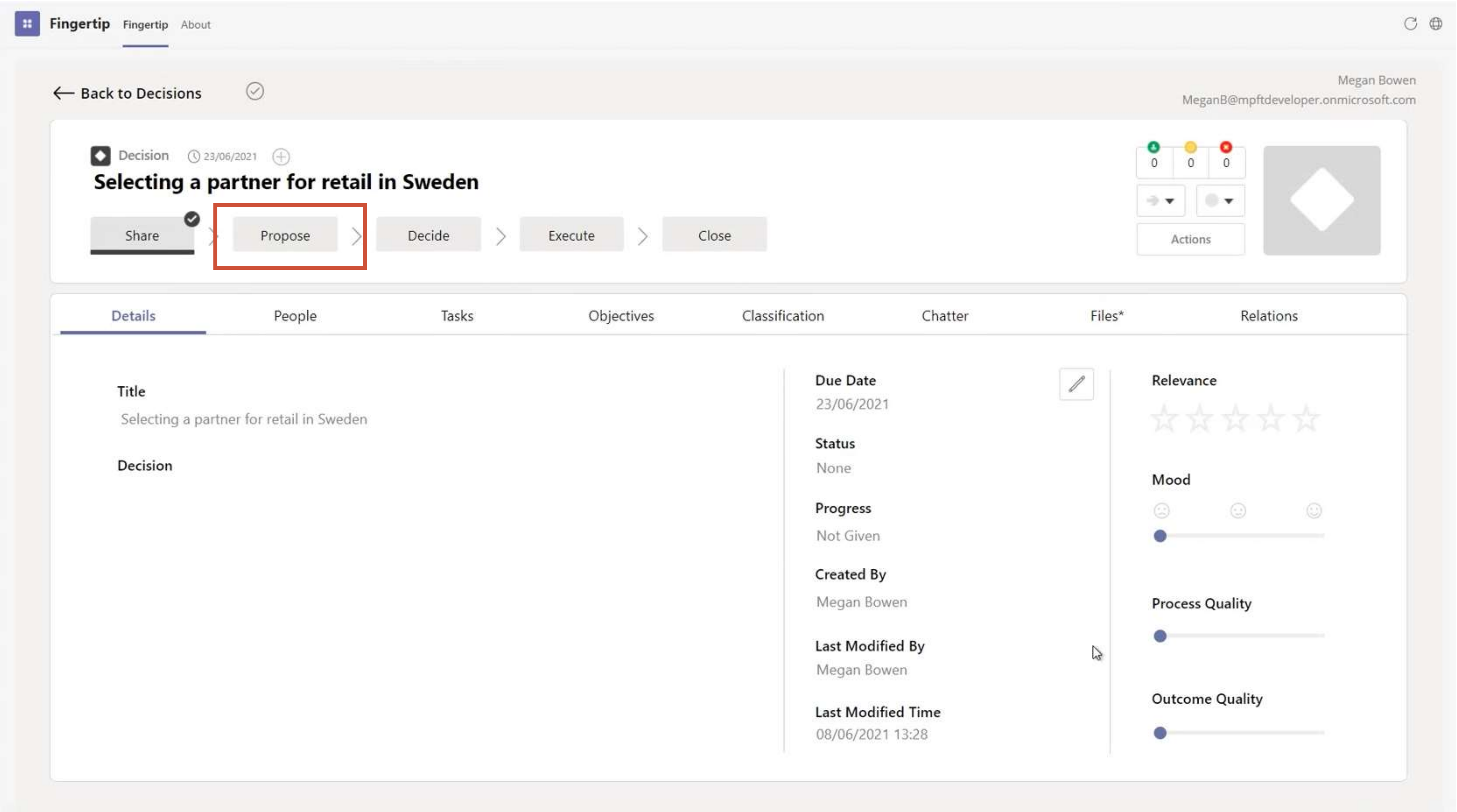
FINGERTIP



How to propose a decision

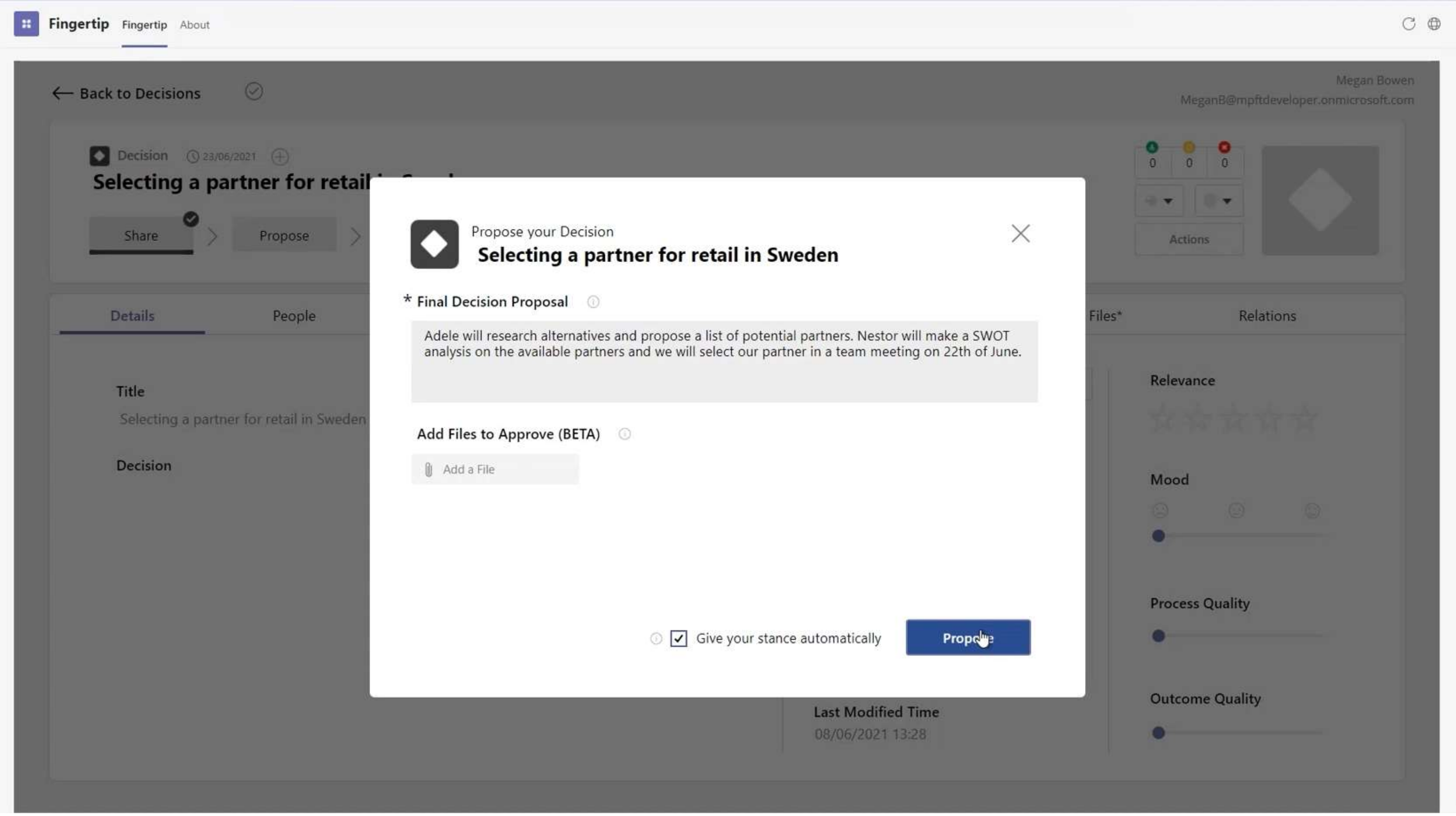
FINGERTIP

How to propose a decision



1. When you are ready to request stances for a decision proposal, you can prompt the participants by moving the decision to the proposal phase. Click on the ”Propose” stage on the life cycle to open the Proposal-popup

How to propose a decision



2. Write an actionable decision proposal with responsible parties and due dates to be approved.

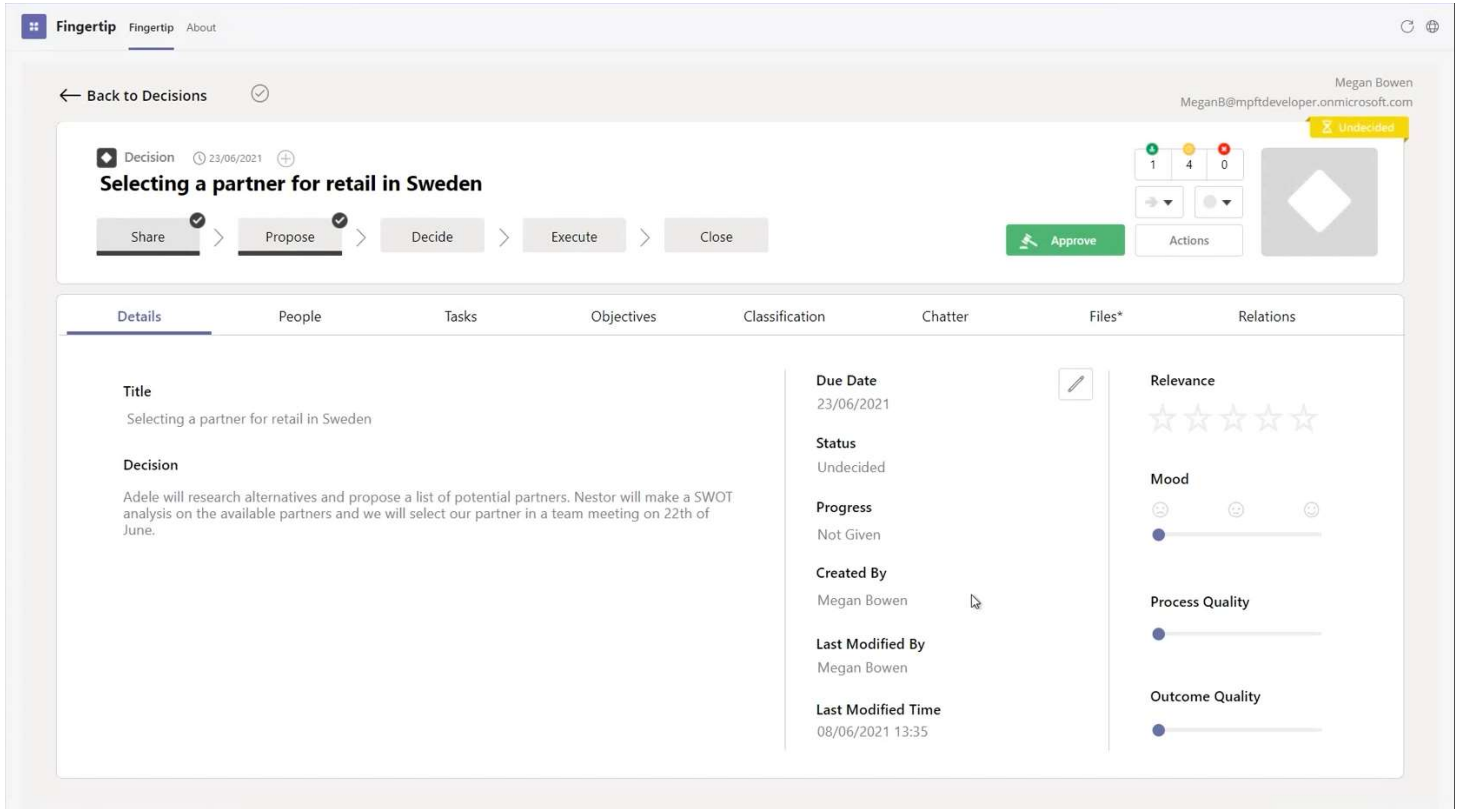
3. You can optionally add files to be approved alongside the proposal

4. You can optionally support your own decision proposal when asking stances from others by ticking the ”Give your stance automatically” checkbox”

5. Click ”Propose” when your done.

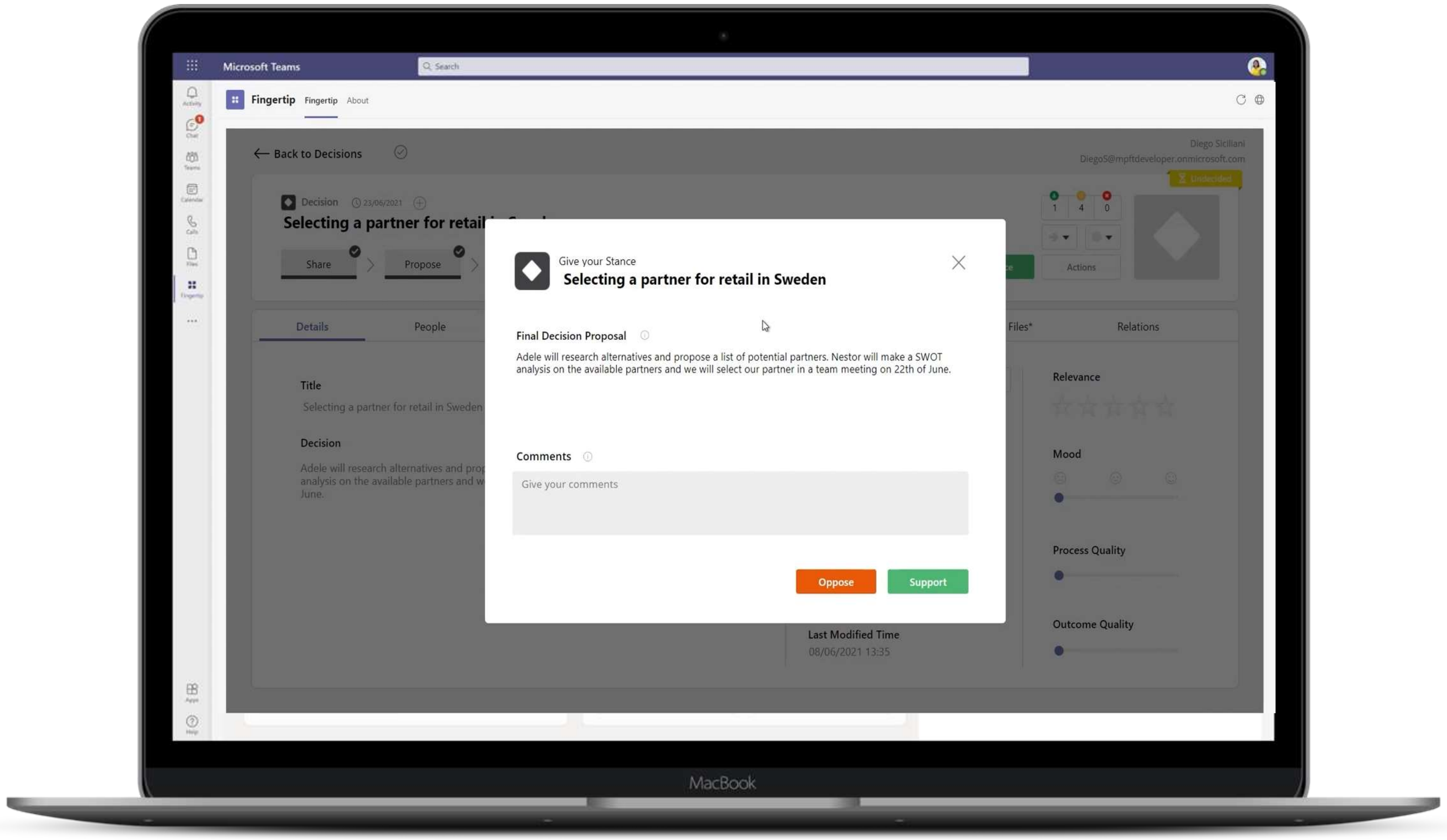
FINGERTIP

How to propose a decision



6. Done! Now all that is left is wait for the participants to answer the call.

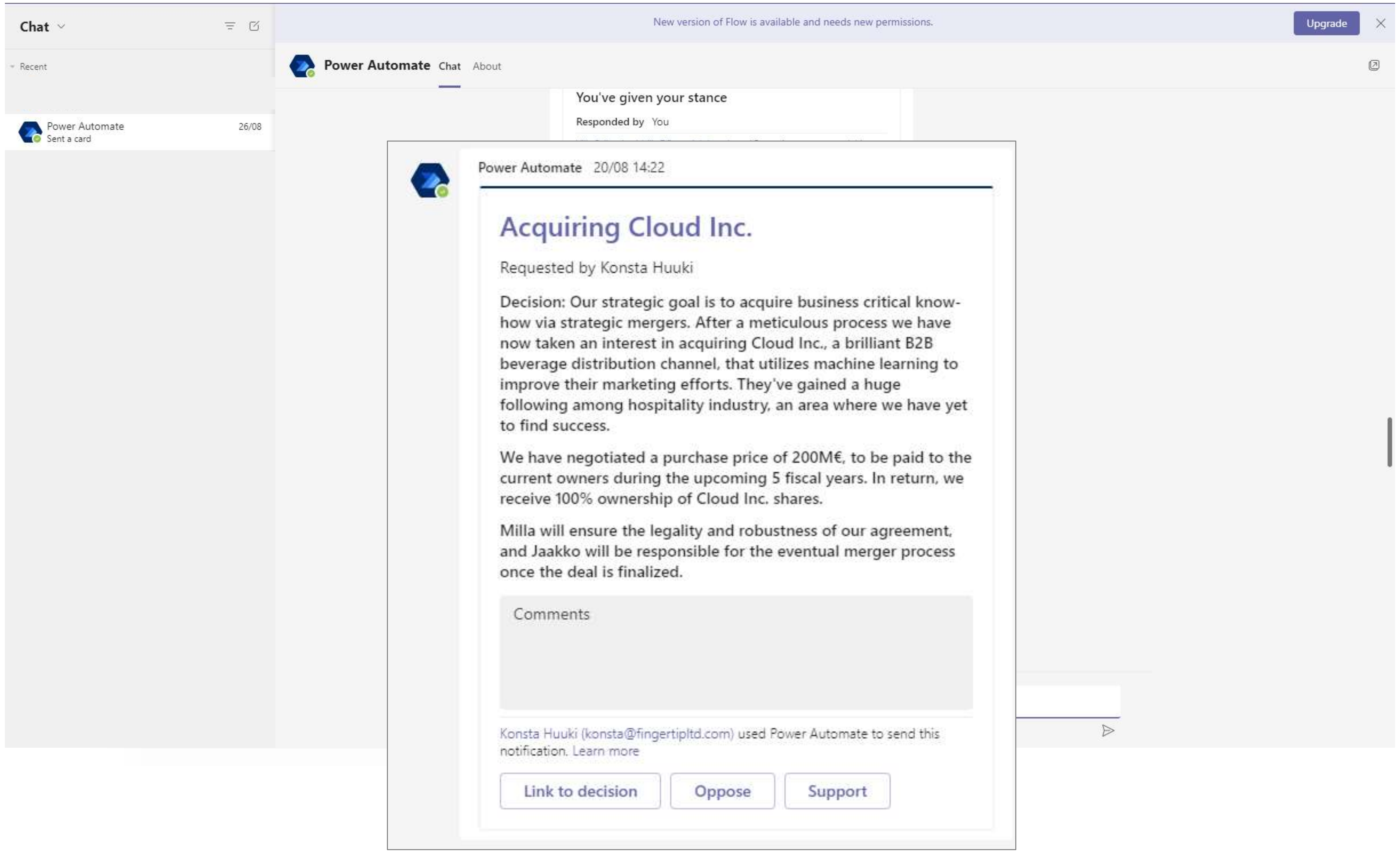
FINGERTIP



How to give a stance to a decision

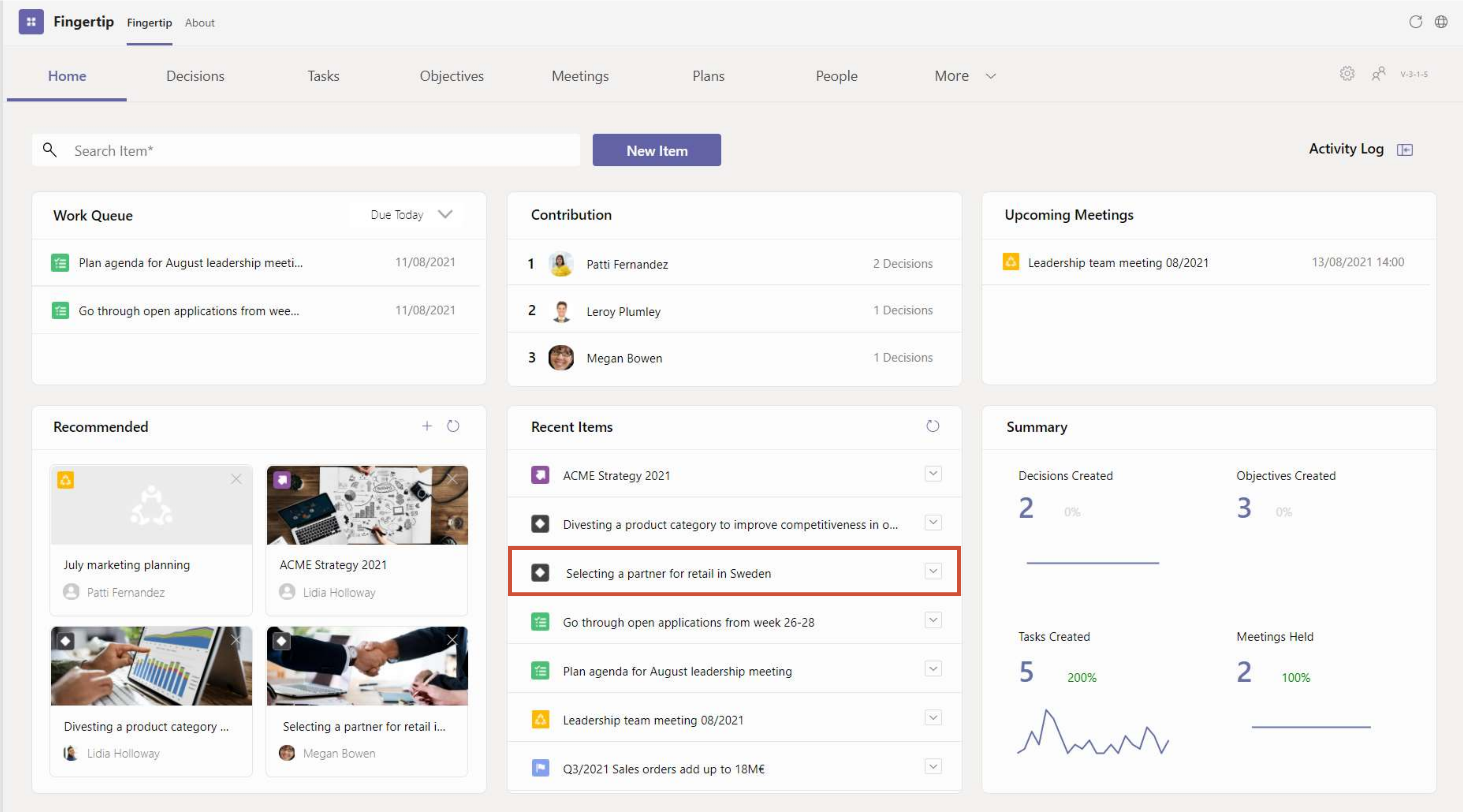
FINGERTIP

How to give a stance to a decision



1. After somebody proposes a decision you are part of you will get a Flow message. You can either comment and support/oppose then and there, or review the decision item in Fingertip.

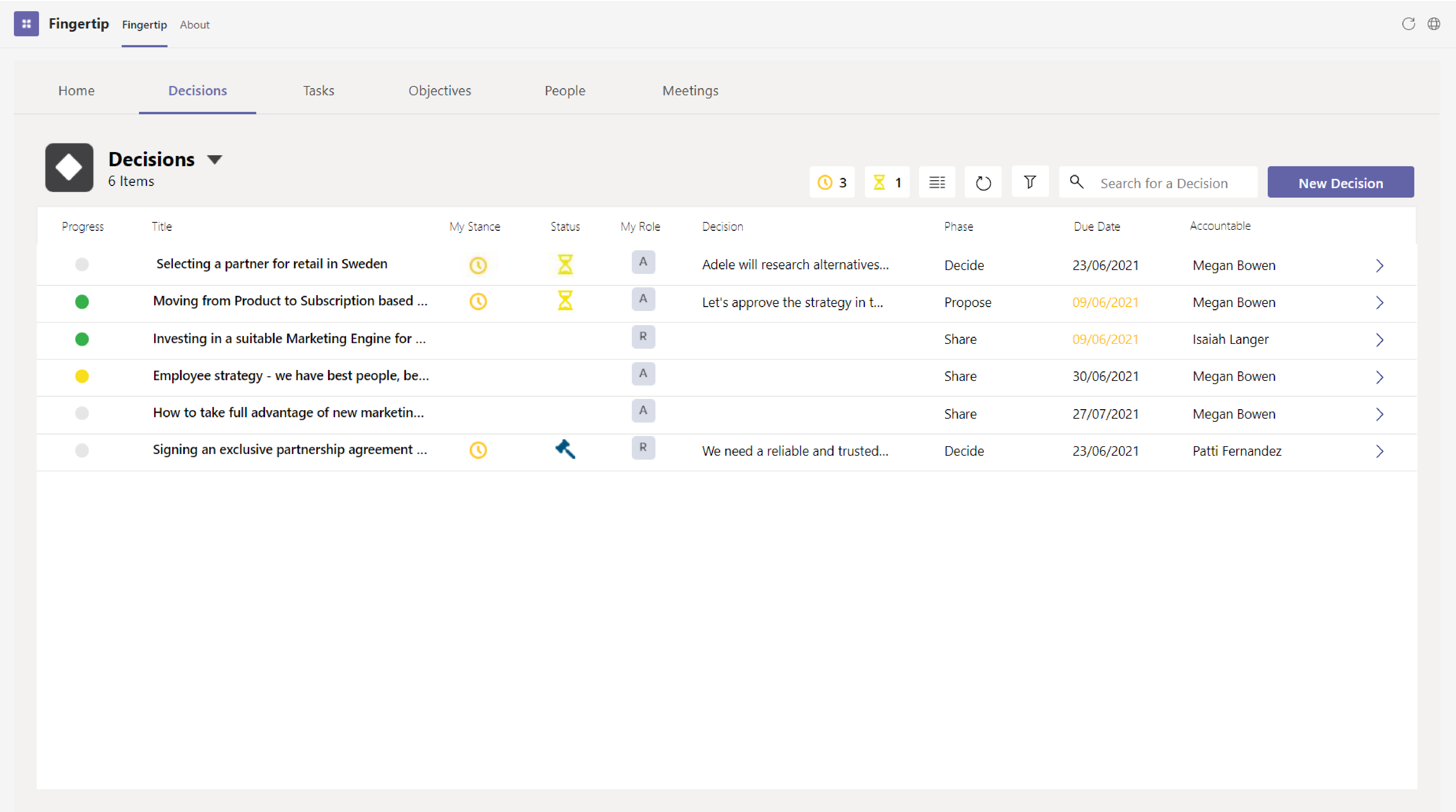
How to give a stance to a decision



2. The proposed decision should be in the recent items box, or you can locate it in the decisions tab.

FINGERTIP

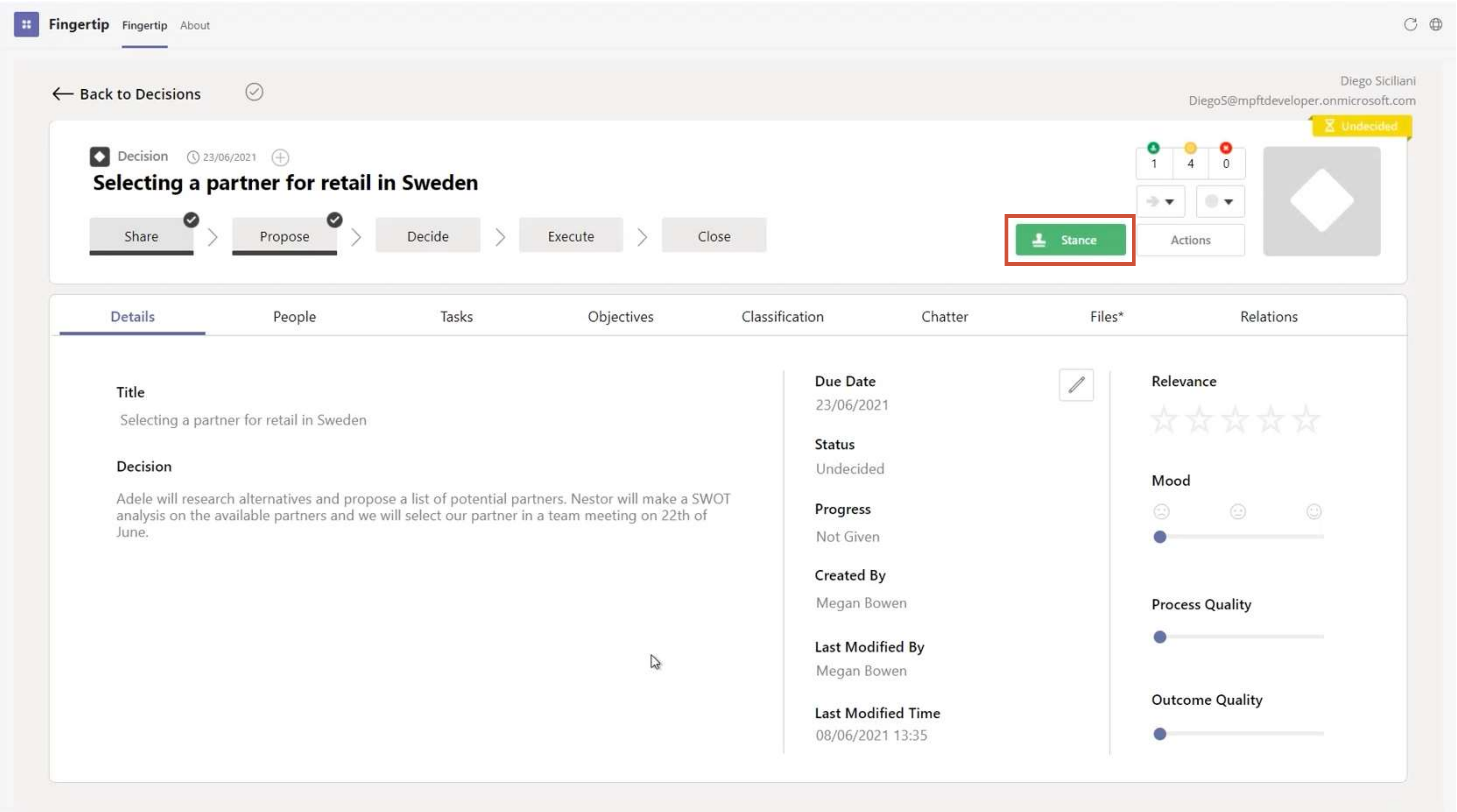
How to give a stance to a decision



3. The yellow clock -icon represents the decisions you are expected to give a stance on.

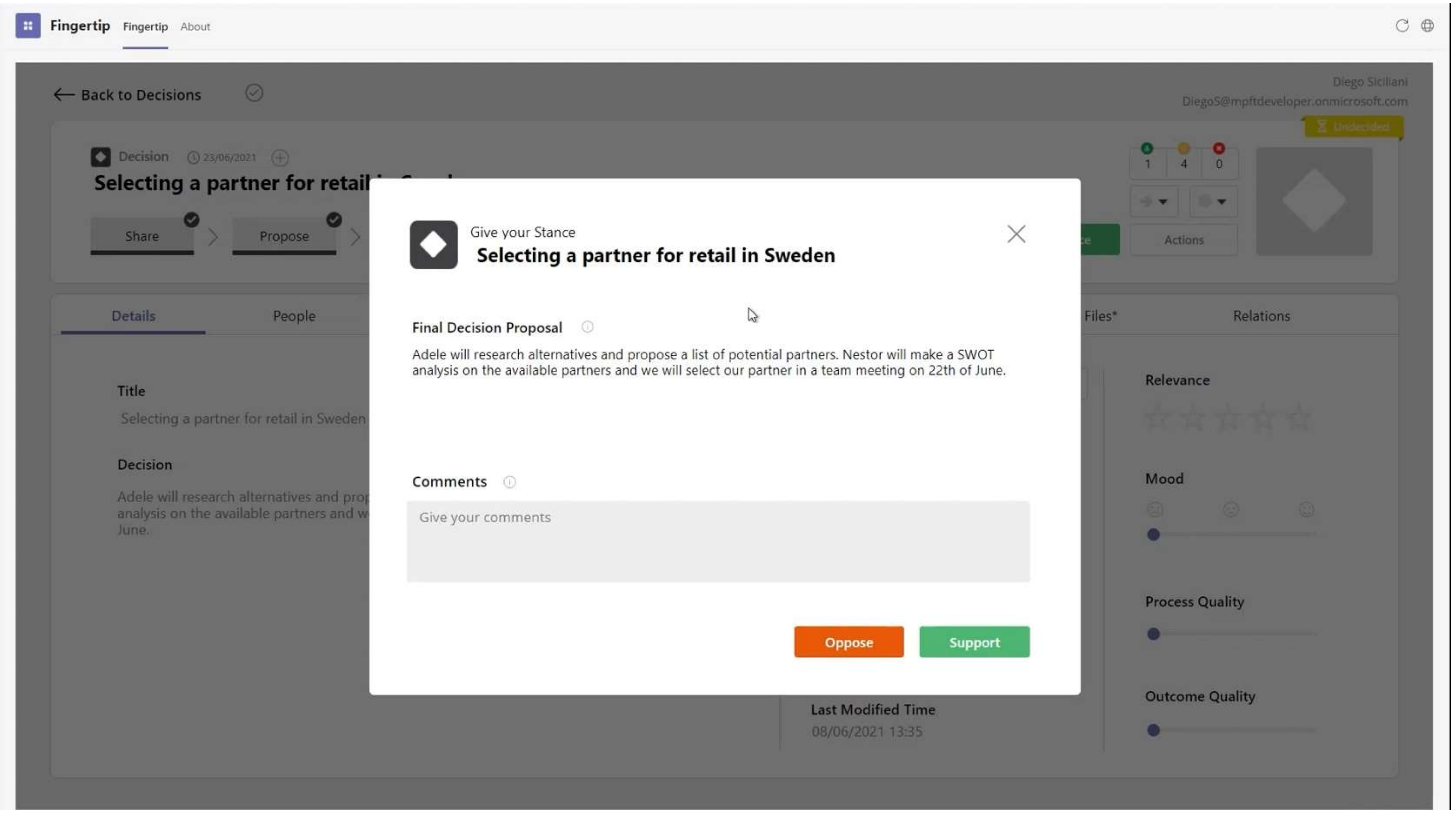
FINGERTIP

How to give a stance to a decision



4. After opening the decision item, you will see a green ”Stance” button. Review all the contents within the decision before giving your stance.

How to give a stance to a decision

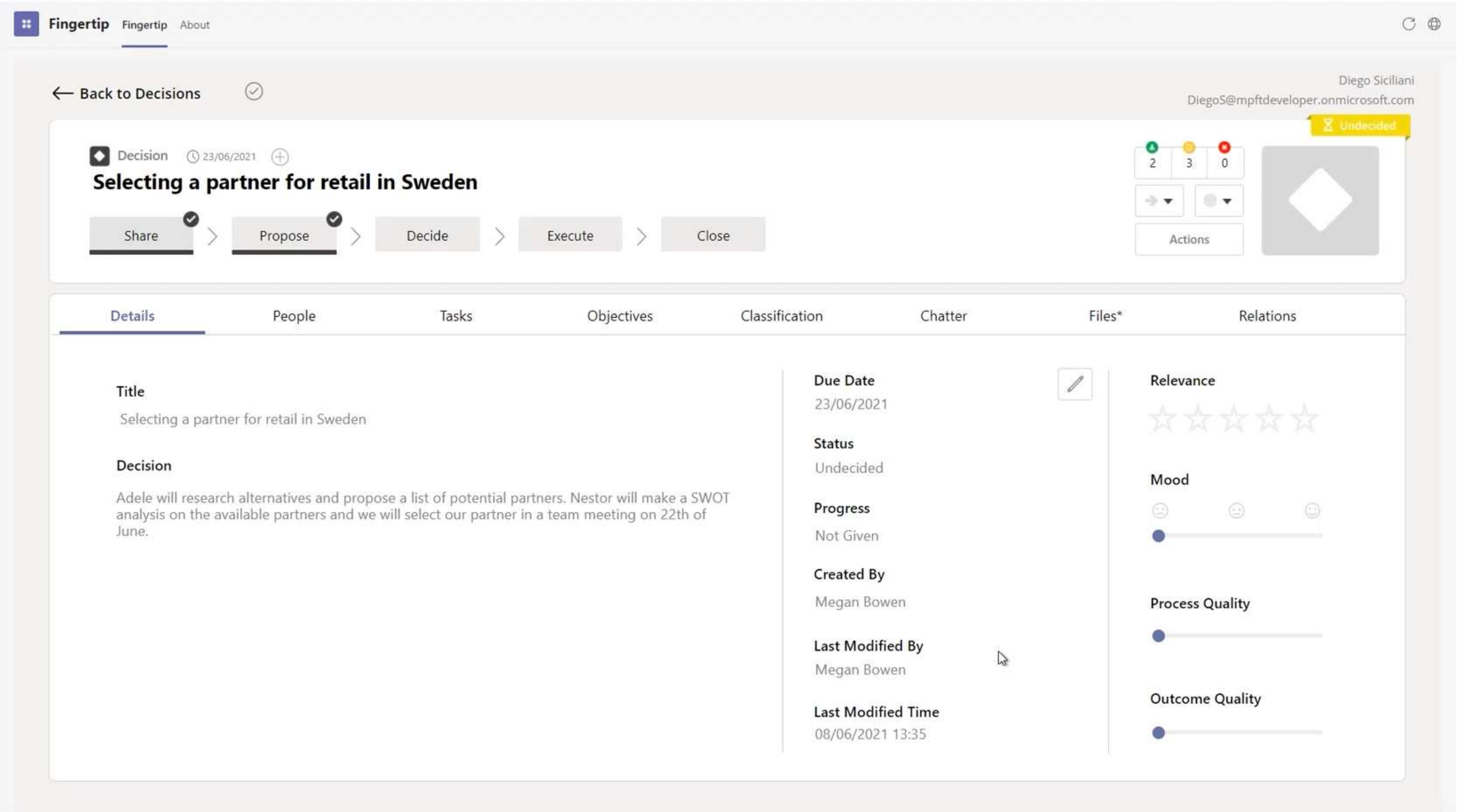


5. You can include a comment with your stance when you support or oppose the proposal.

6. Click on the stance you wish to communicate to the decision owner.

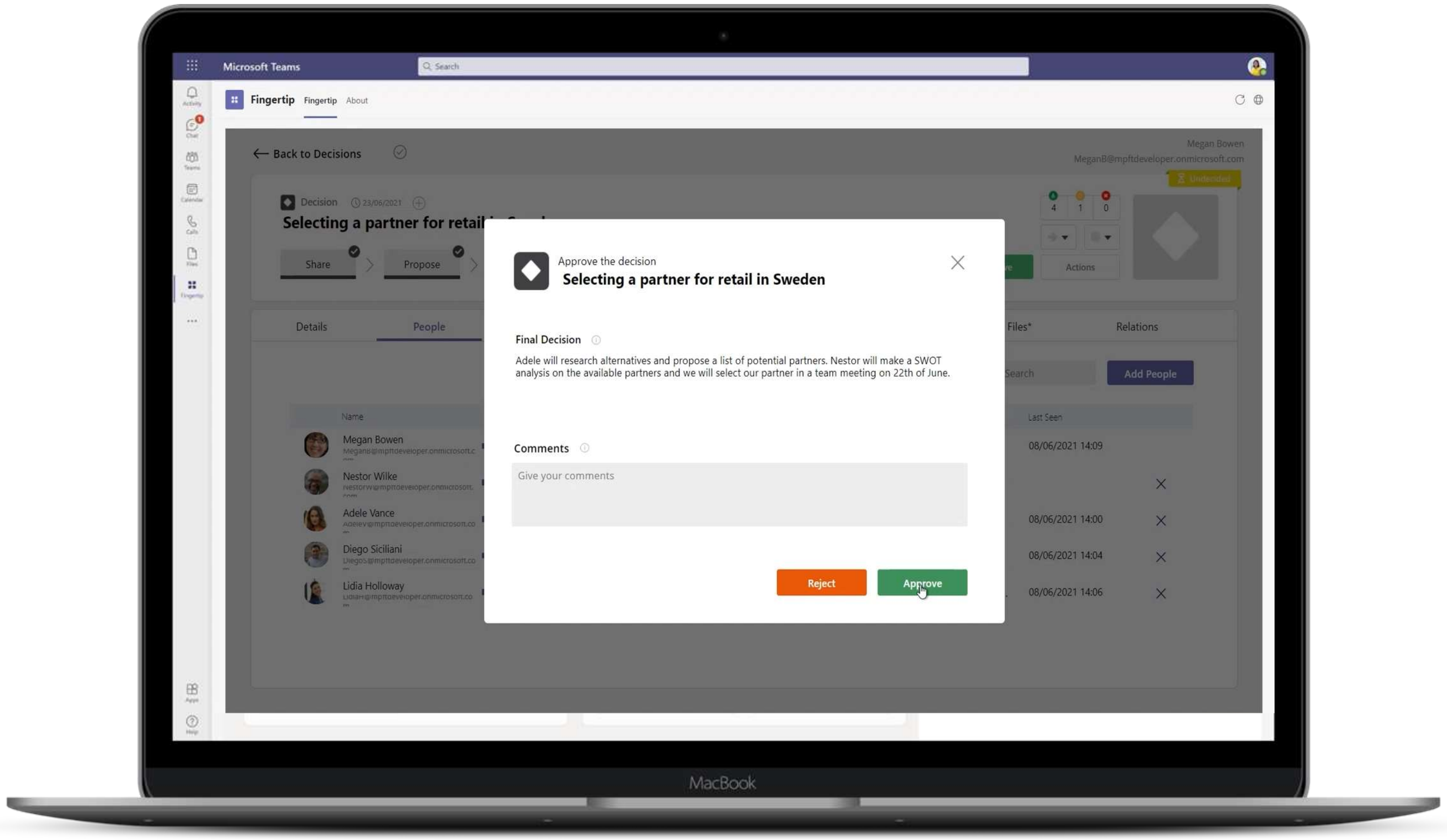
FINGERTIP

How to give a stance to a decision



7. Done. The decision stakeholders will see your stance, as well as your optional comment. Just sit back and wait for the decision to be approved or rejected.

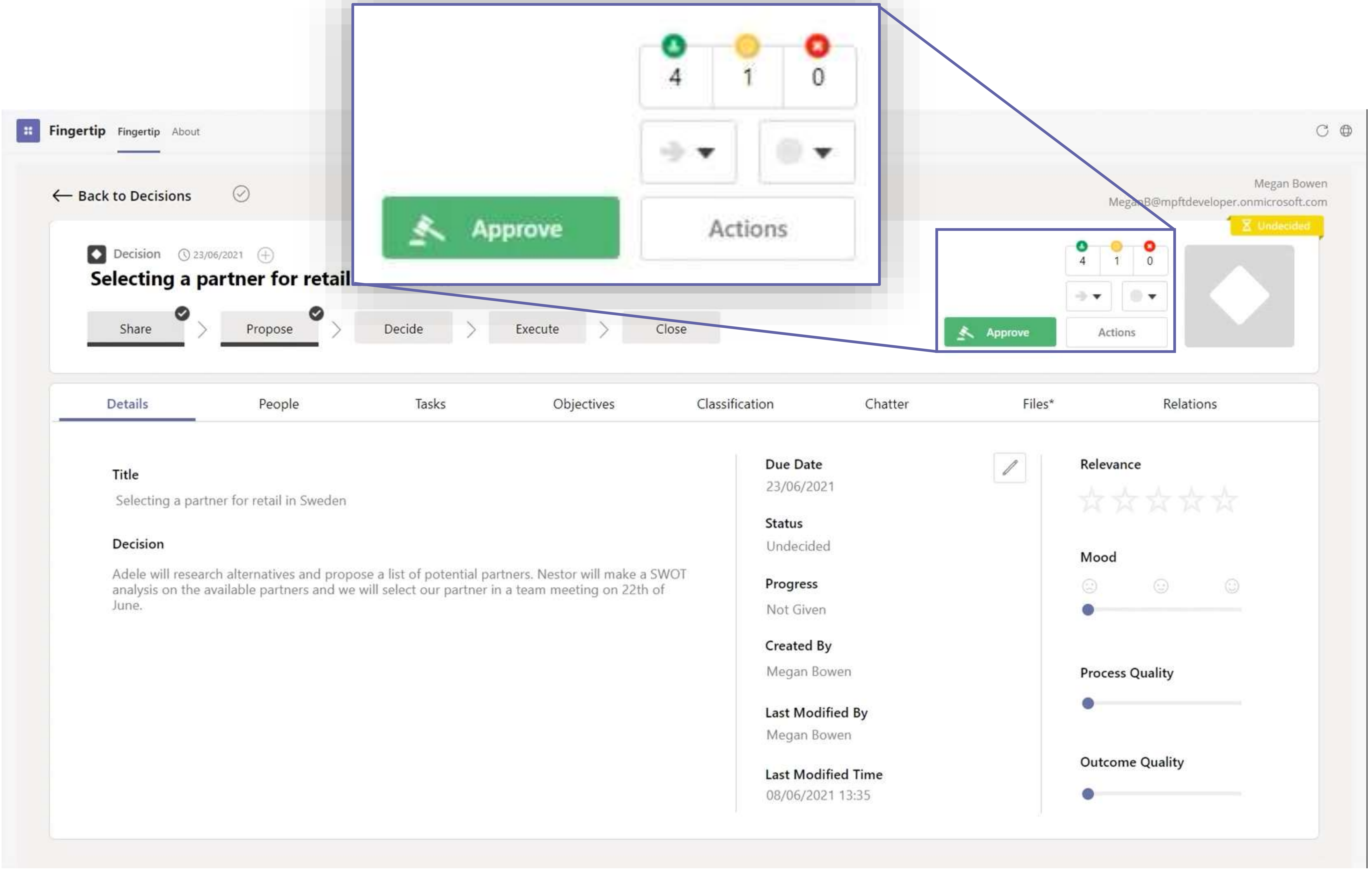
FINGERTIP



How to approve a decision

FINGERTIP

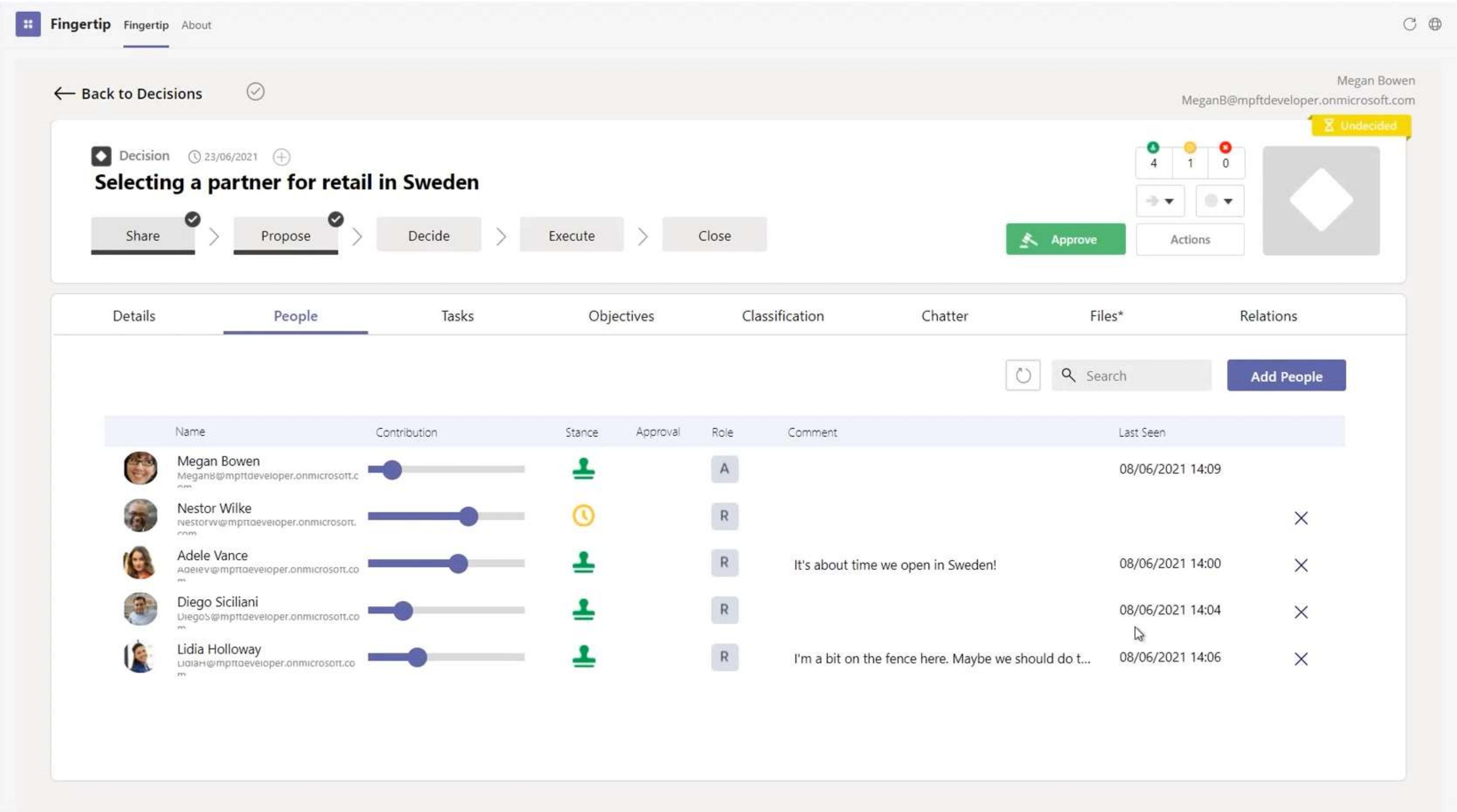
How to approve a decision



1. You will see a summary of stances in the decision header. Once you are ready, you can click ”Approve” to approve or reject your decision proposal

FINGERTIP

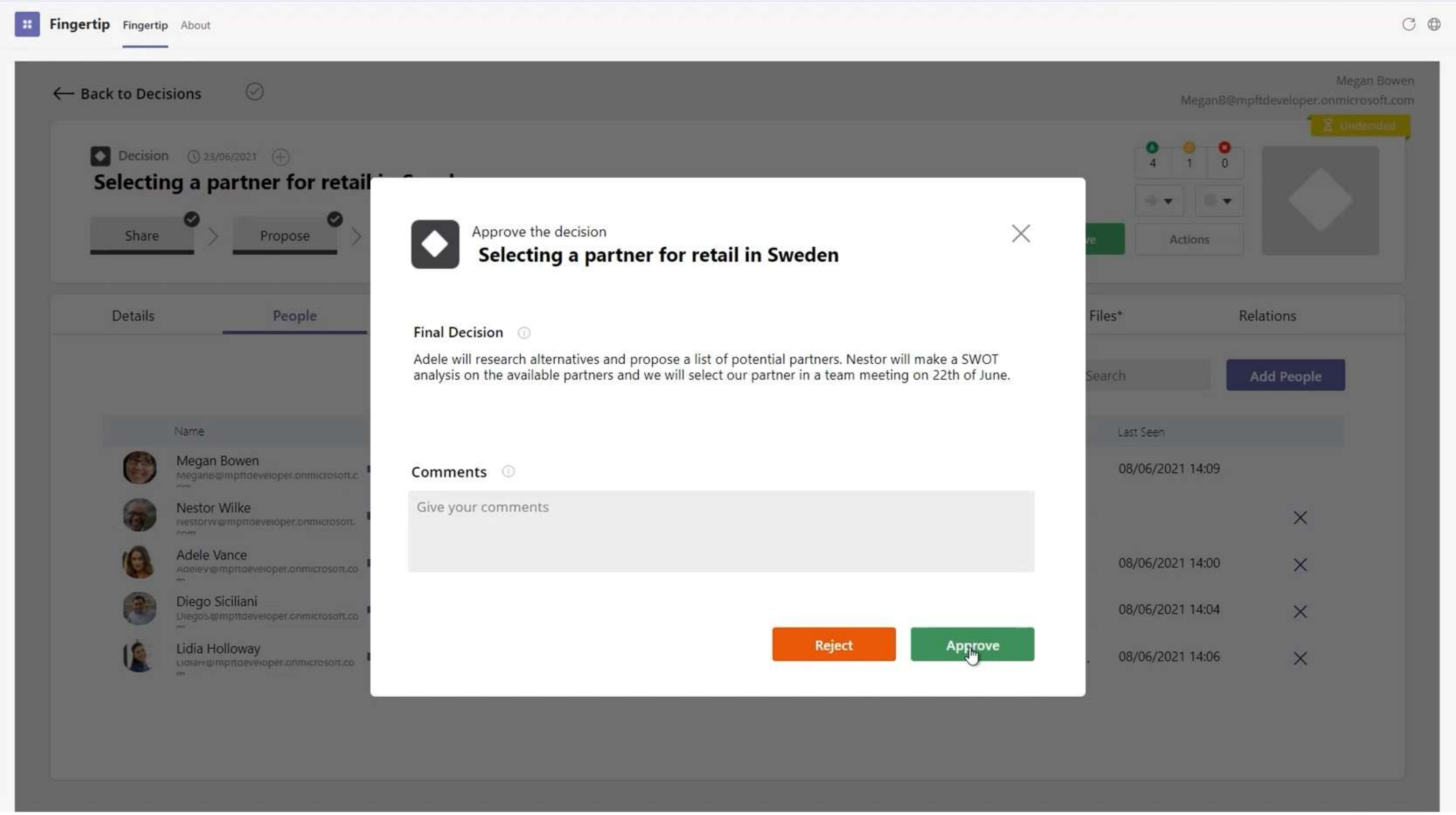
How to approve a decision



2. The people tab also shows the comments from decision participants for you to review before approving

FINGERTIP

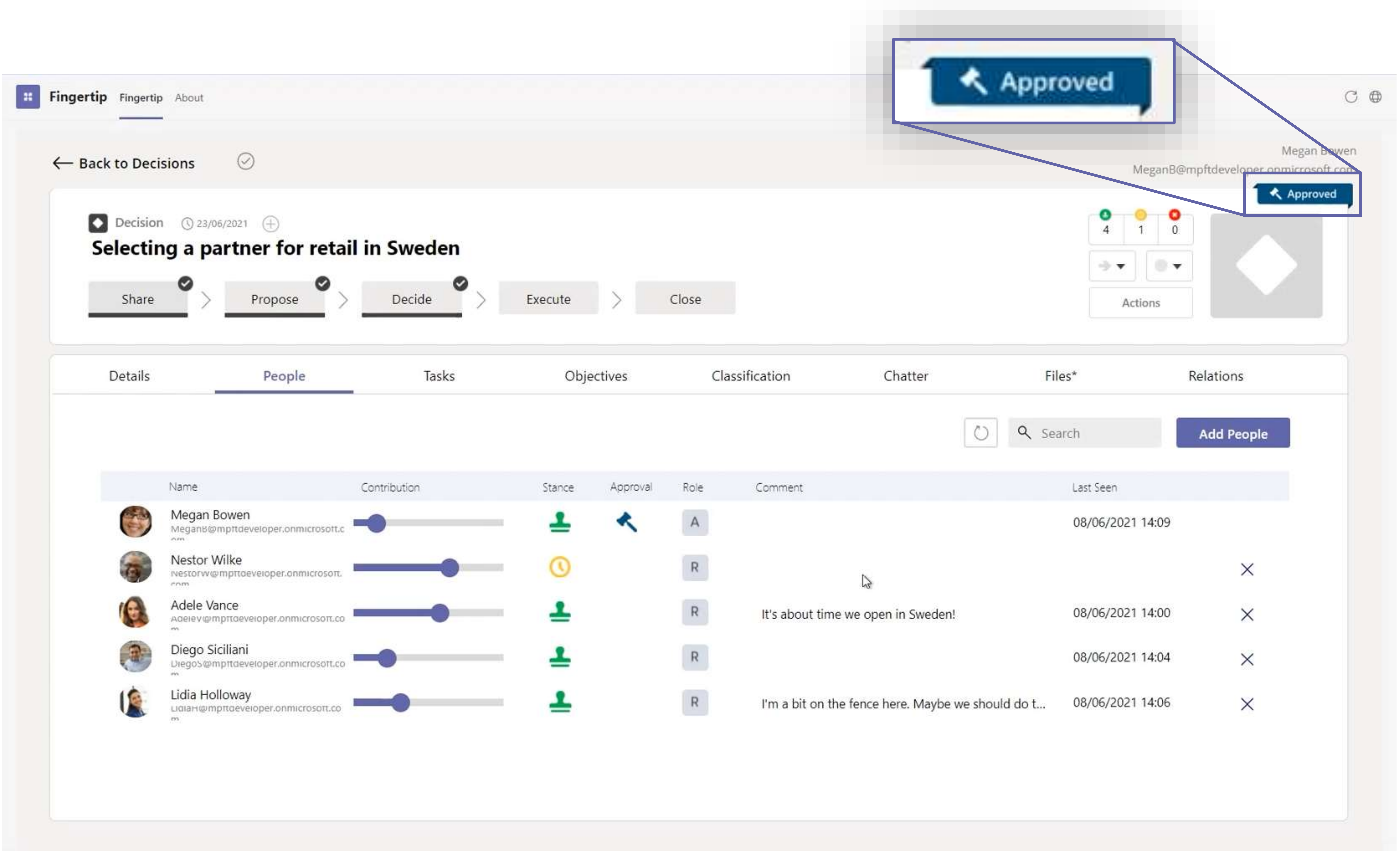
How to approve a decision



3. In the approval popup, you can add a comment regarding your decision and the click ”Approve” or ”Reject” to make the decision.

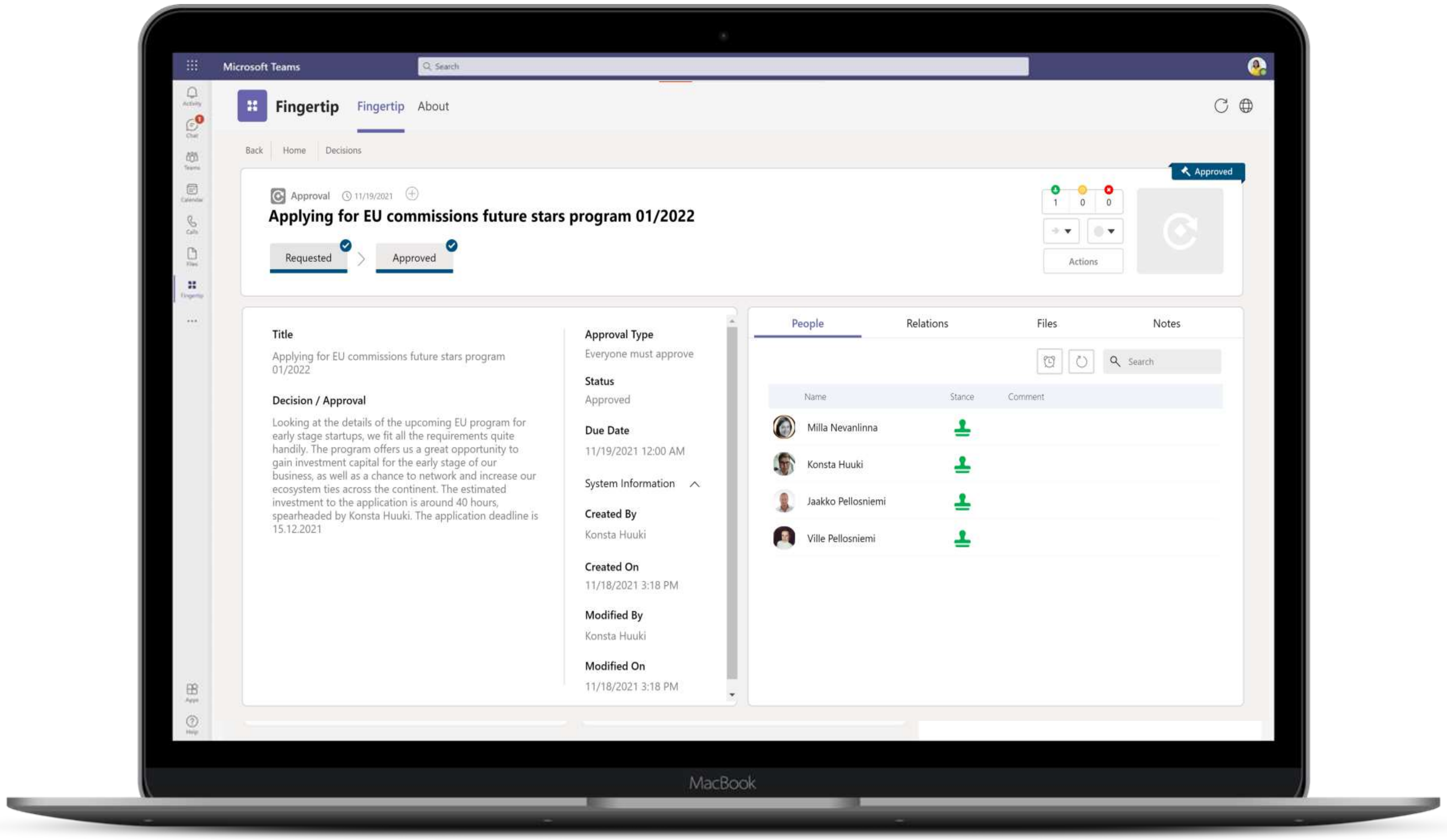
FINGERTIP

How to approve a decision



4. As you see, your decision is now approved, and you are ready to move on!

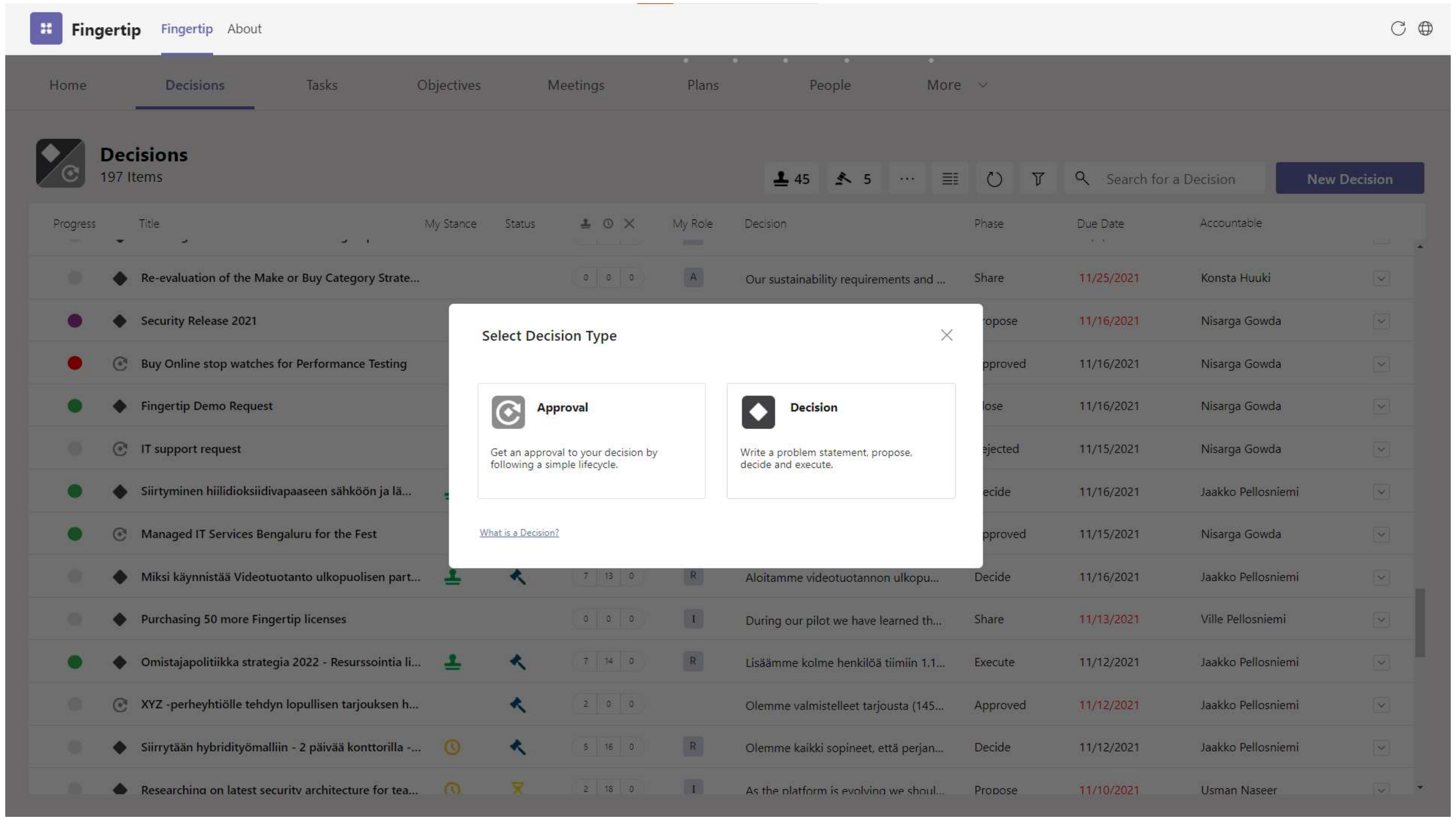
FINGERTIP



How to create an approval

FINGERTIP

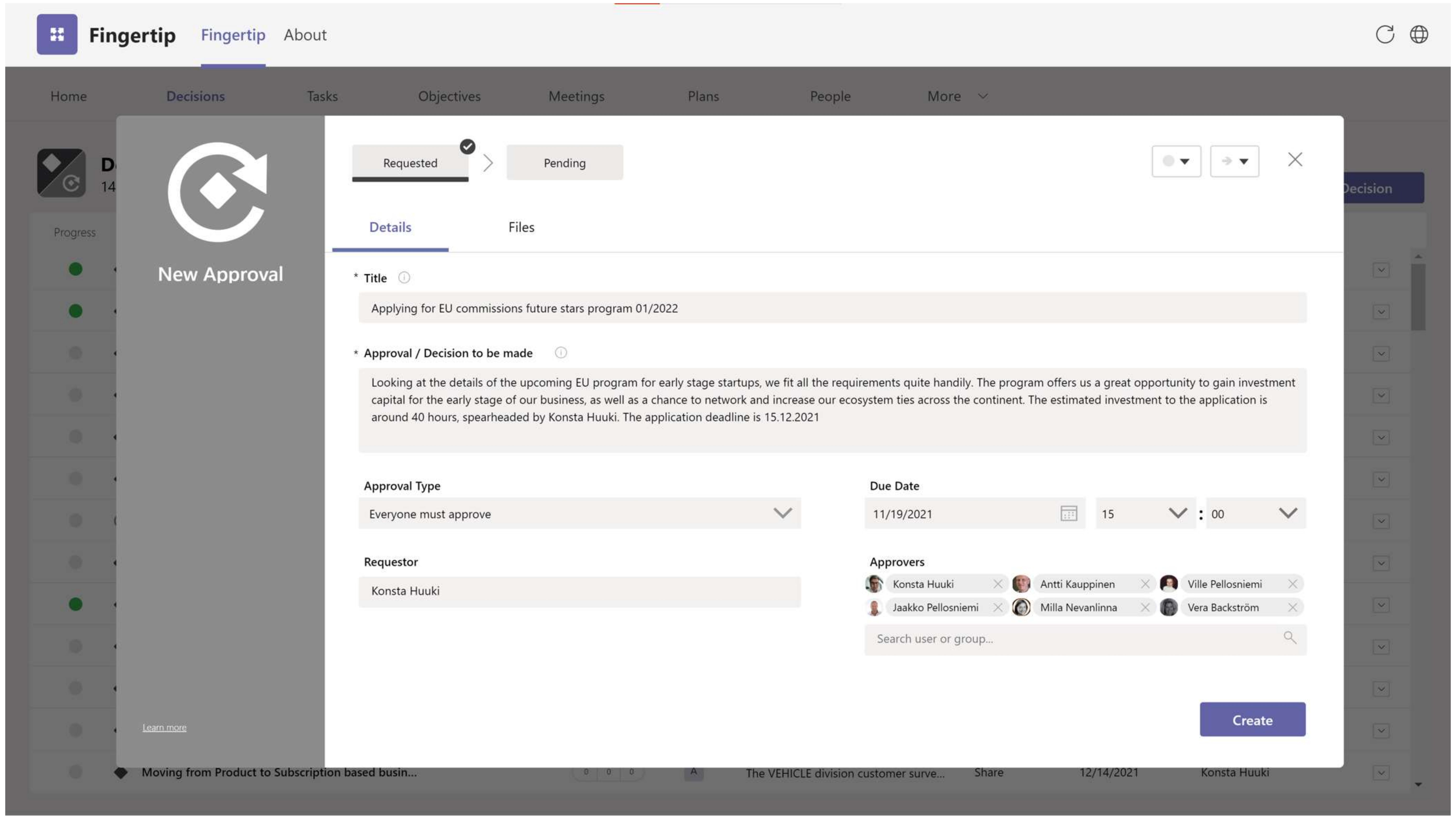
How to create an approval



1. Click on ”New Decision” on the Decisions tab and select Approval. You can do this from any New Item popup as well. This will open the New Approval popup.

FINGERTIP

How to create an approval

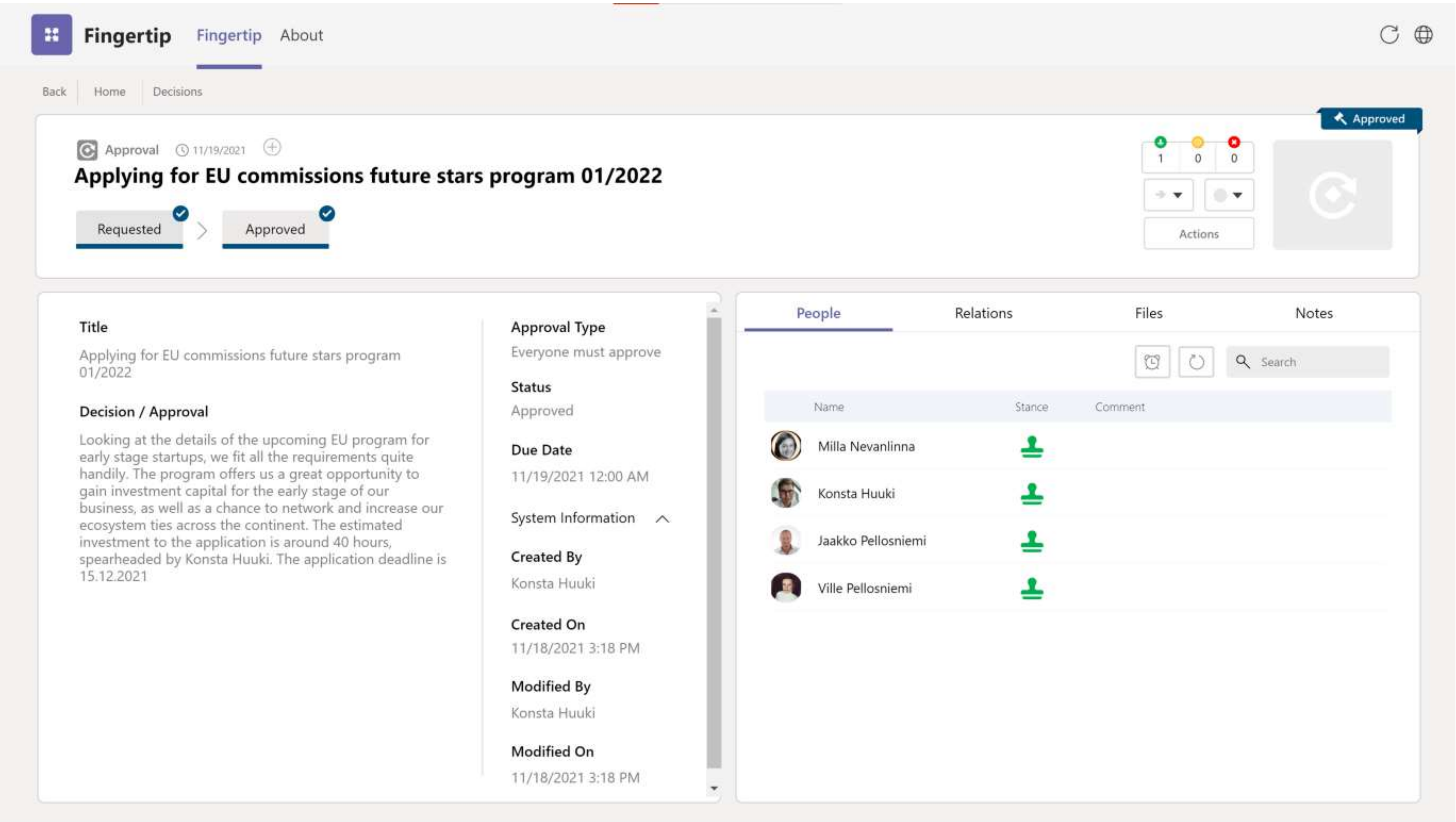


2. Write down the details of the approval: Title, proposal, approval type, due date, and the people who you need to get the proposal approved.

The type influences how the requested proposal will get approved. After everyone has supported, after any one approver has supported, or manually, should the approval requestor hold the power to themselves after receiving stances.

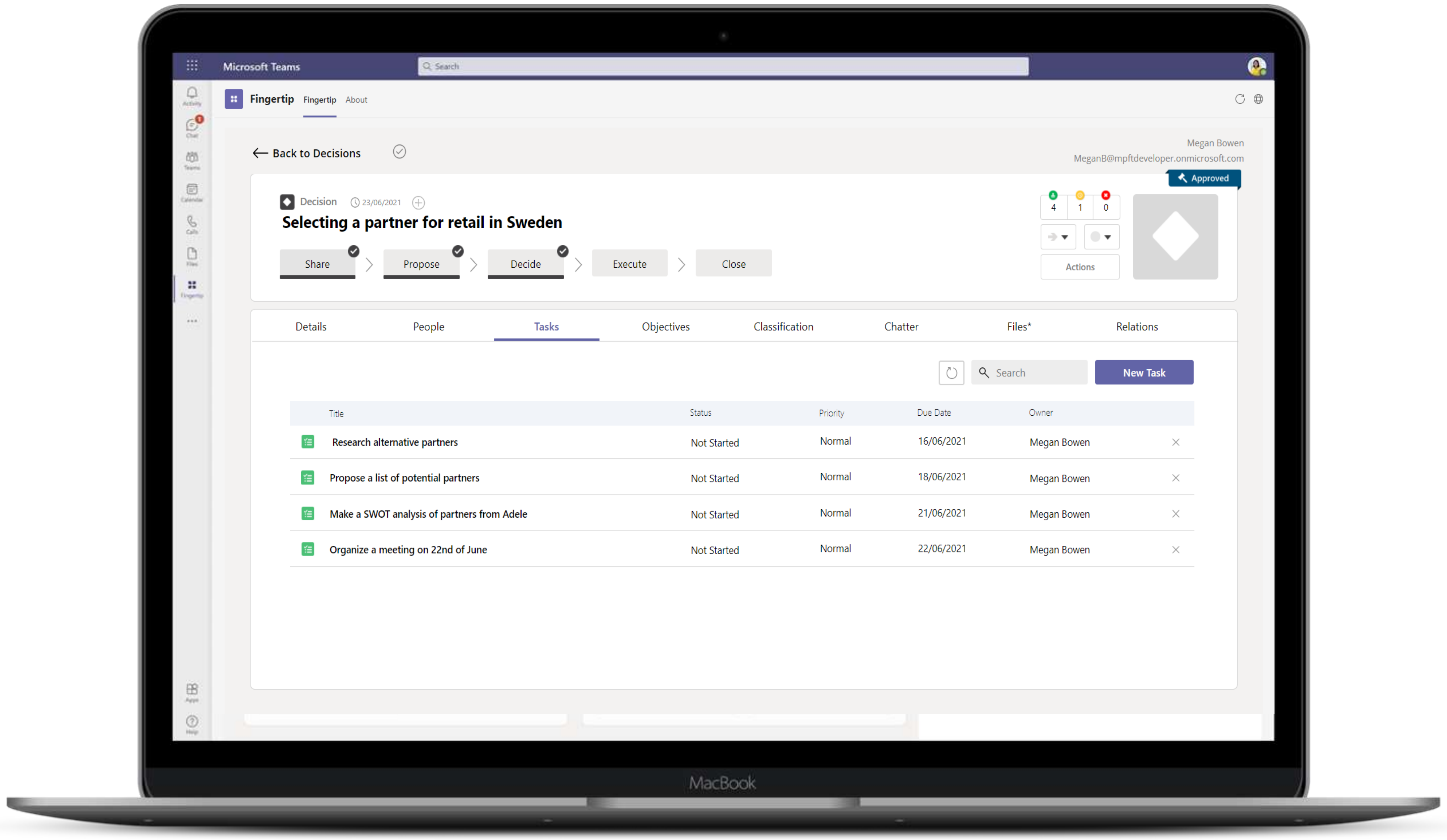
3. Click create to share the proposal with the approvers.

How to create an approval



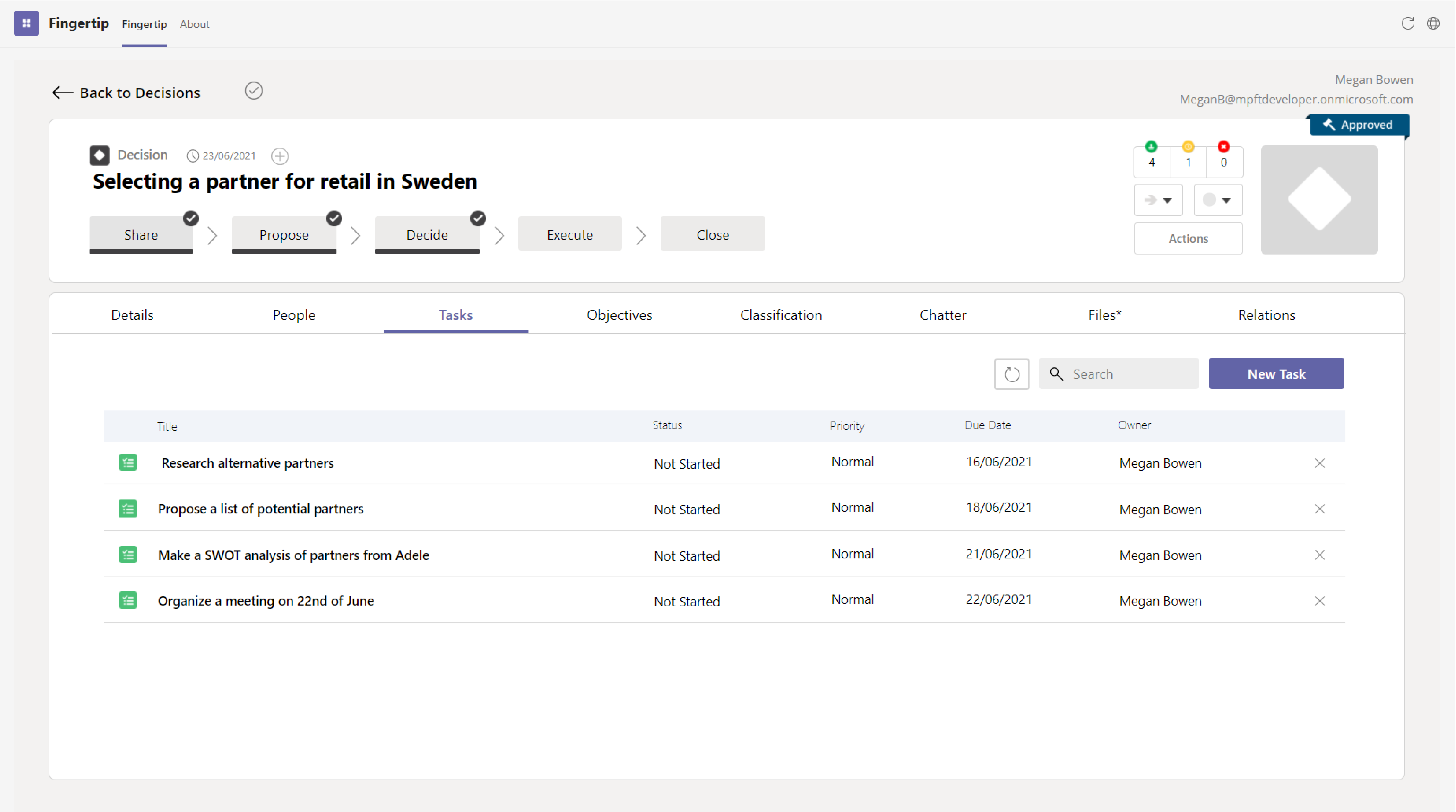
4. Done! You can now sit back and wait for the approvers to give their stances and comments

FINGERTIP



How to manage tasks in a decision

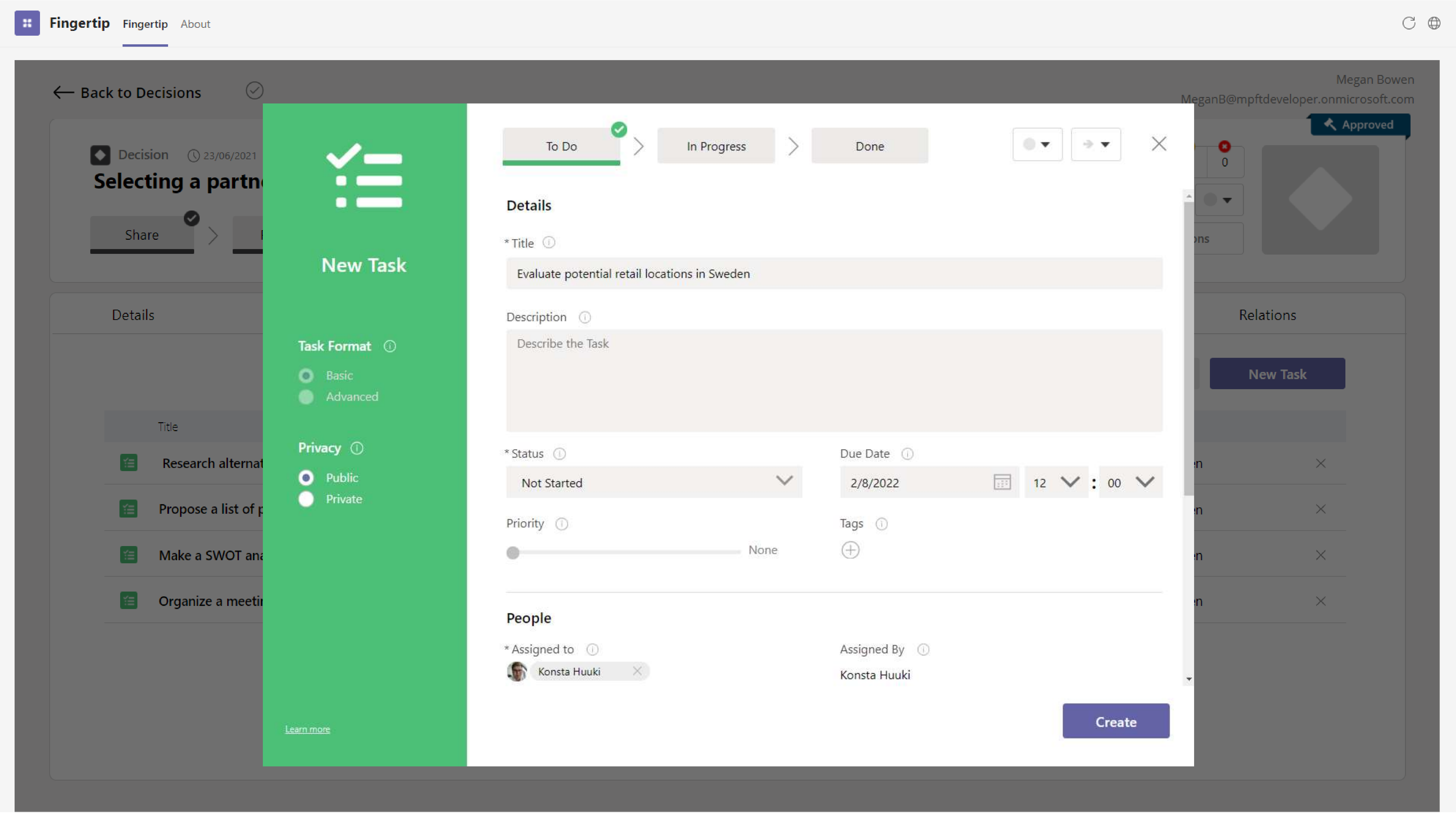
How to manage tasks in a decision



1. You can add tasks to decision participants at any stage of the decision, but it’s the most natural to start completing them after a decision is made. Head to the Tasks-tab and click on ”New Task” to create a new task.

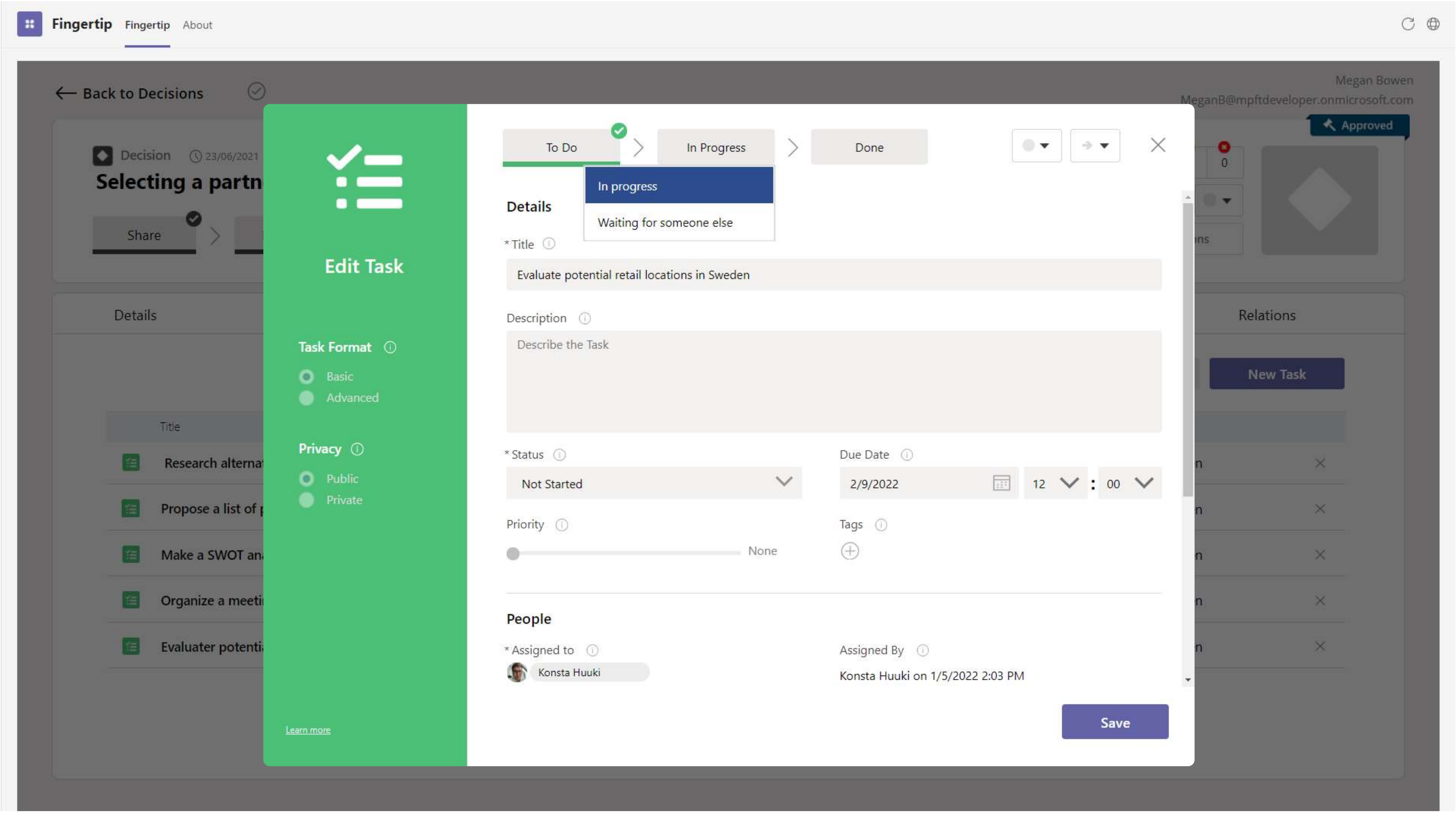
FINGERTIP

How to manage tasks in a decision



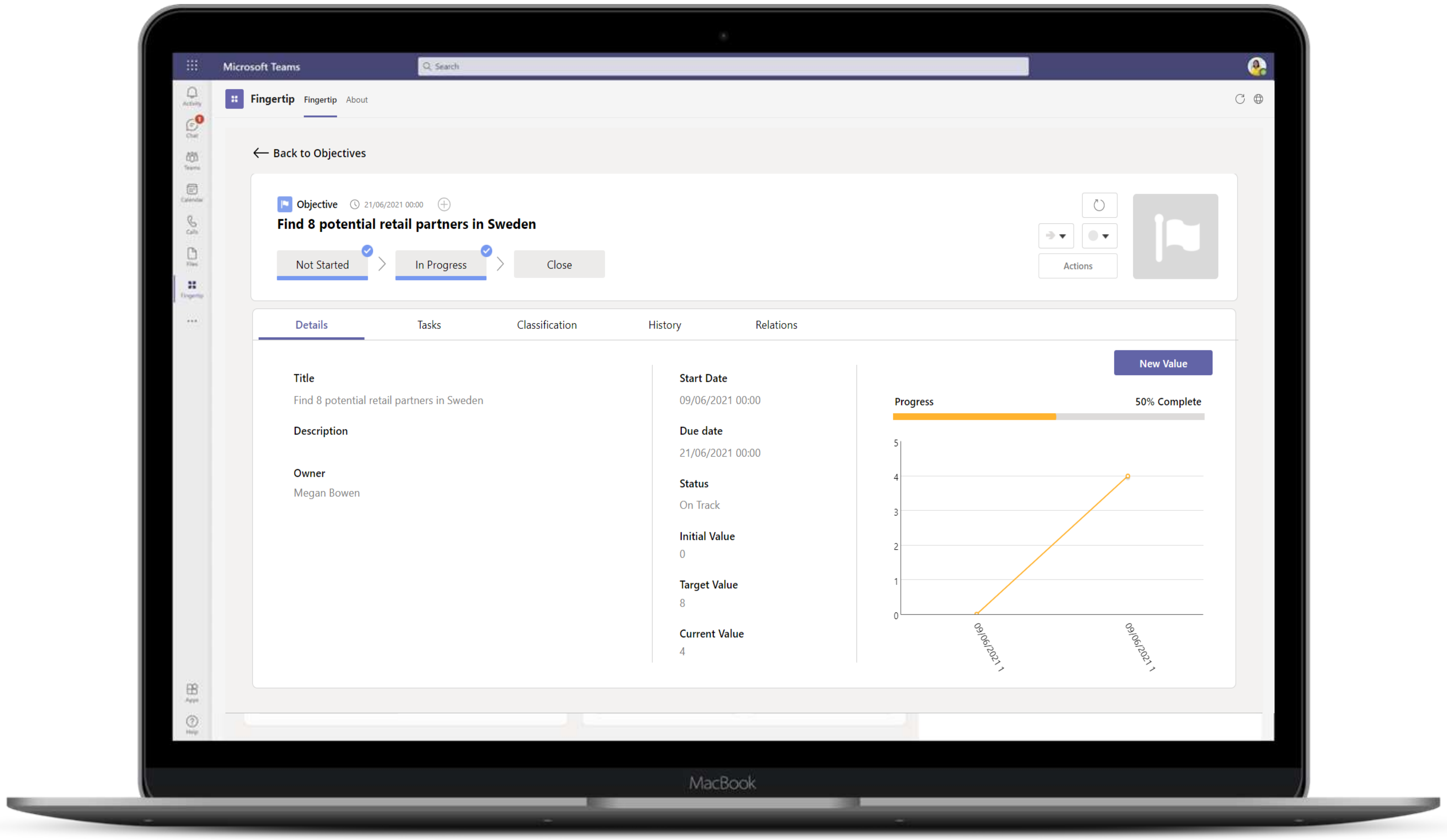
2. Create an actionable task, set a due date, priority and assignee, and click save. Any additional details may be written to the description box. You can also set tags or already change the task status.

How to manage tasks in a decision



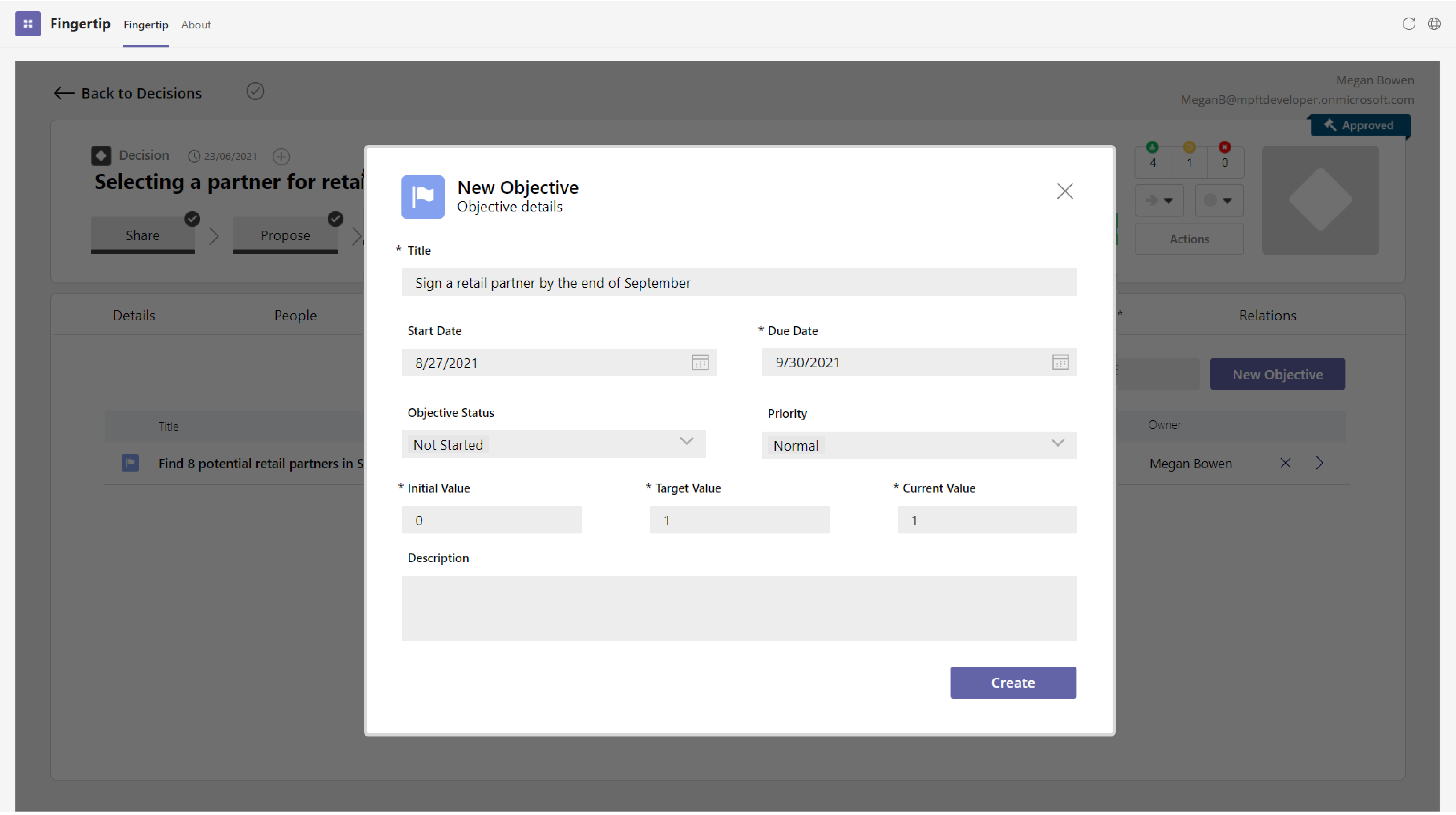
3. To update task status, just click on the task in the list and select a stage from the popup. Your task status will be instantly visible to everyone!

FINGERTIP



How to manage objectives in a decision

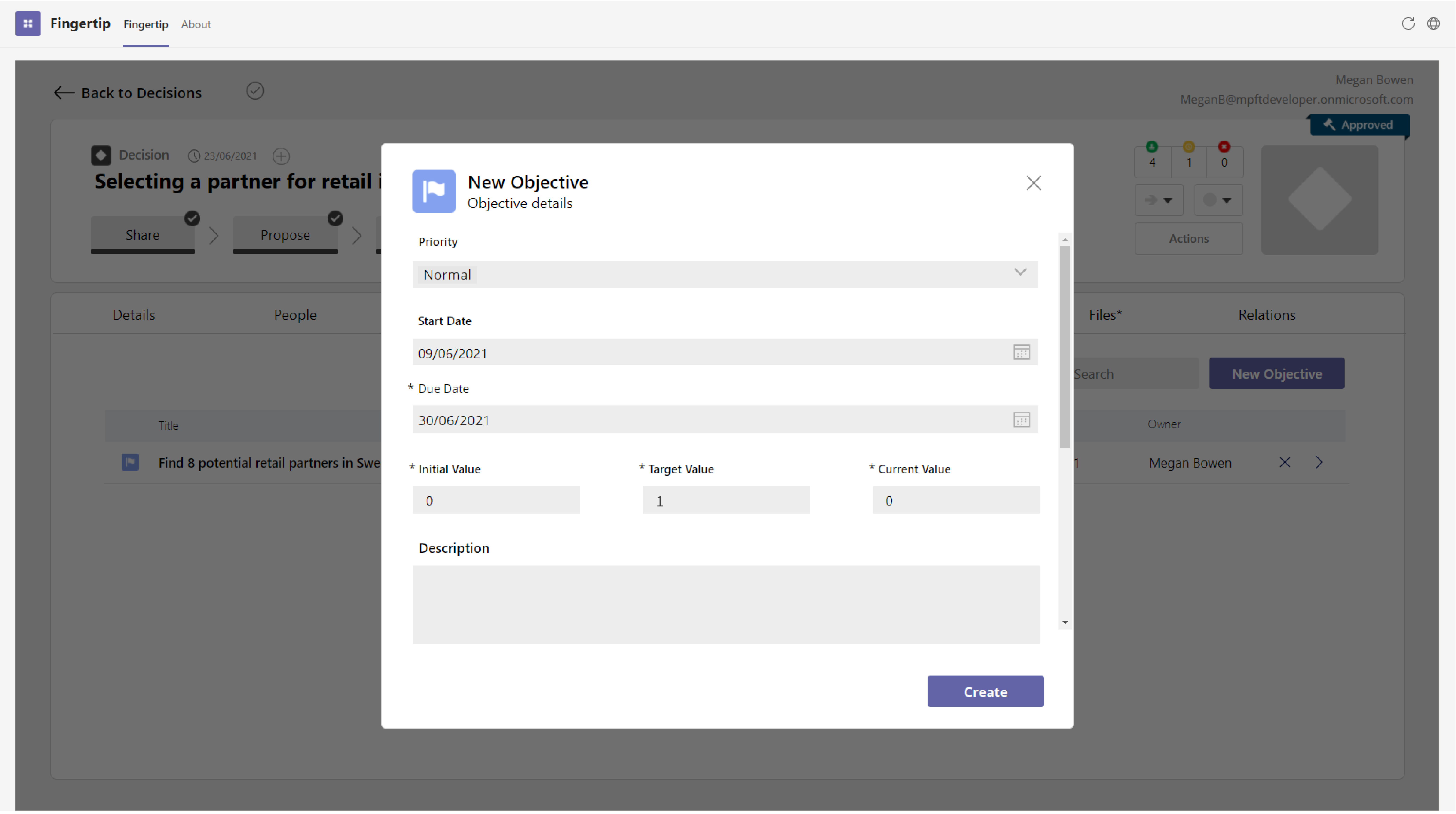
How to manage objectives in a decision



1. Create objectives for your decisions in the objectives tab.
2. Select **New Objective** and set a target you want to reach
3. Fill in the rest of the details

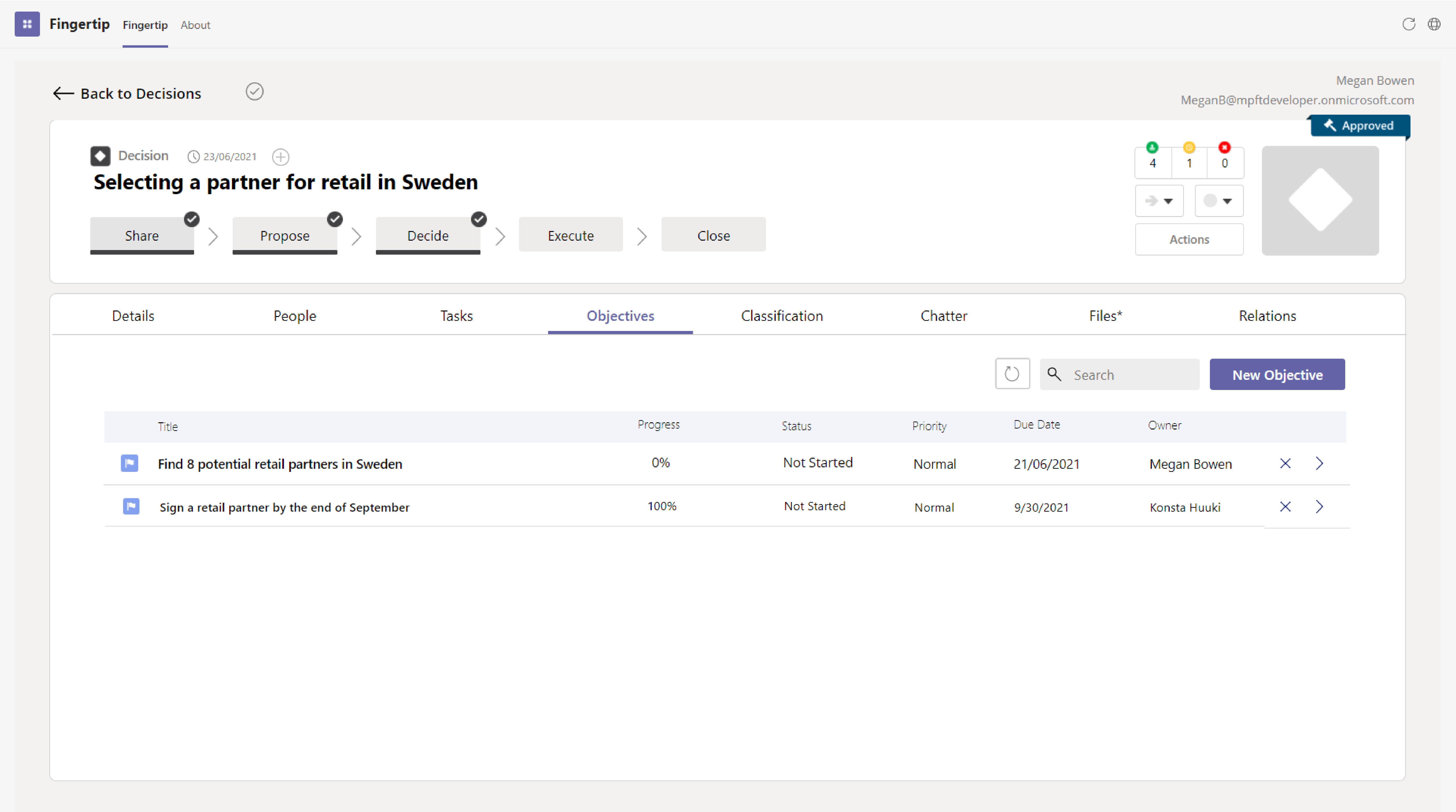
FINGERTIP

How to manage objectives in a decision



3. Fill in the rest of the details

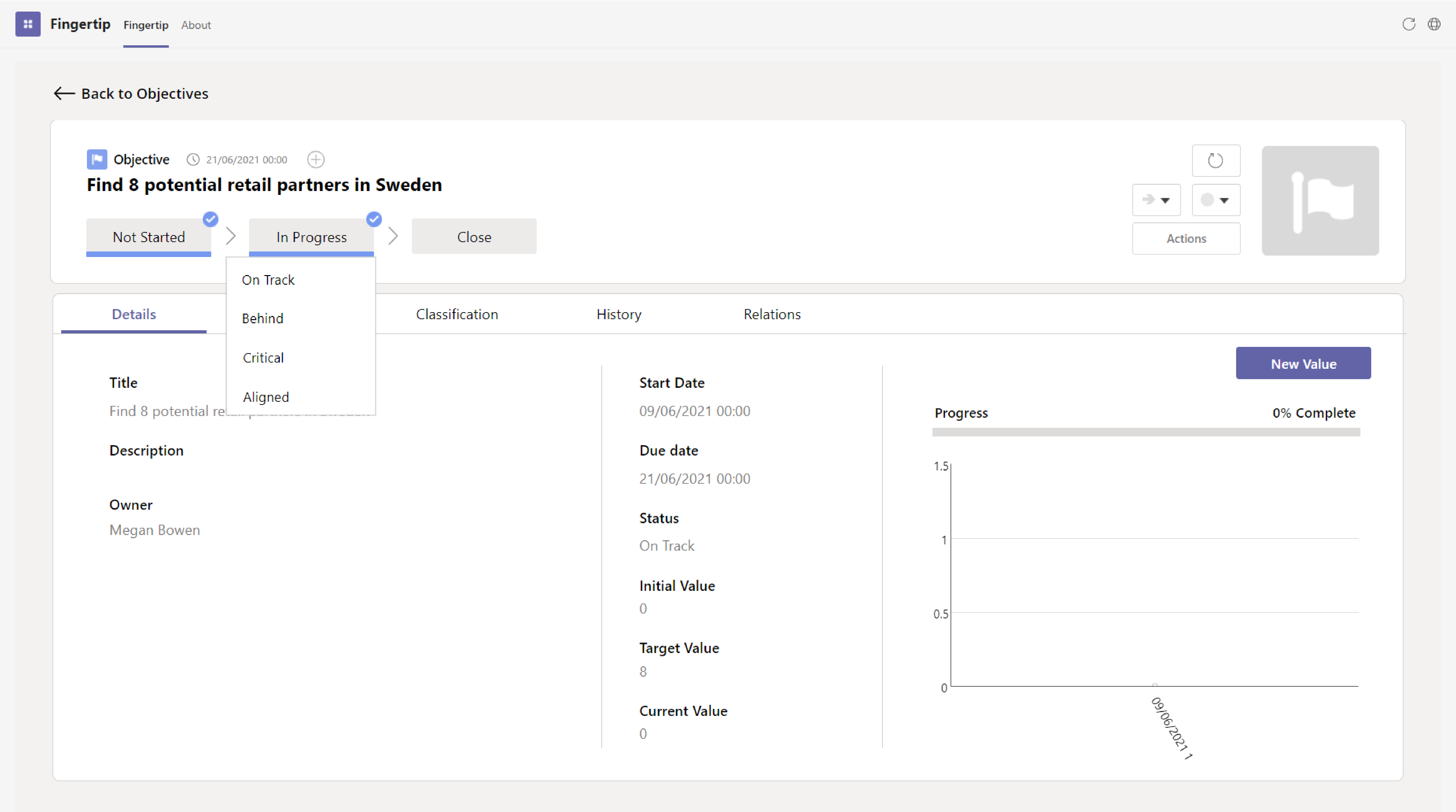
How to manage objectives in a decision



4. Objectives will be visible to everyone in the decision. To update an objectives progress, click on it to open the objective item.

FINGERTIP

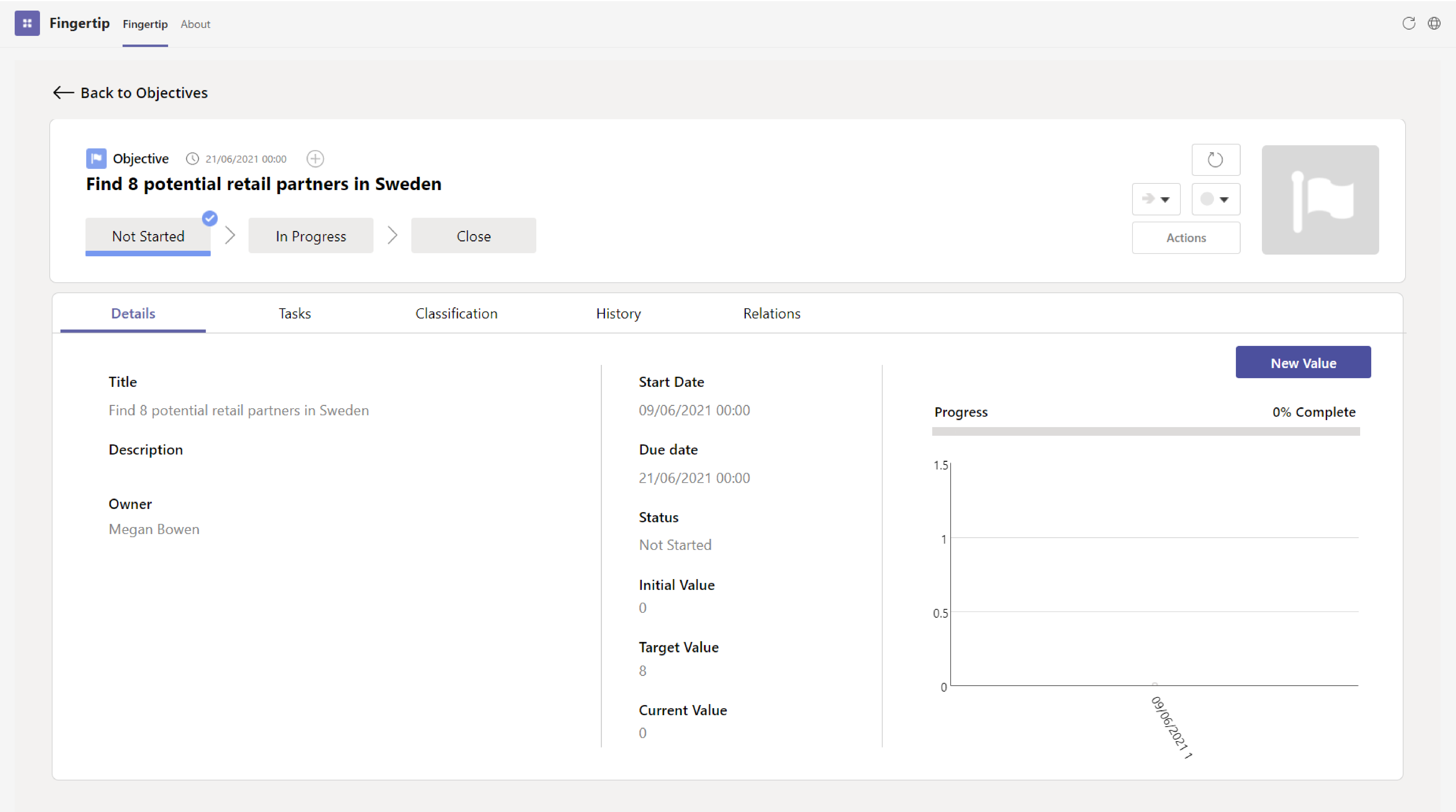
How to manage objectives in a decision



5. Update the objectives status by clicking on the separate stages in the life cycle.

FINGERTIP

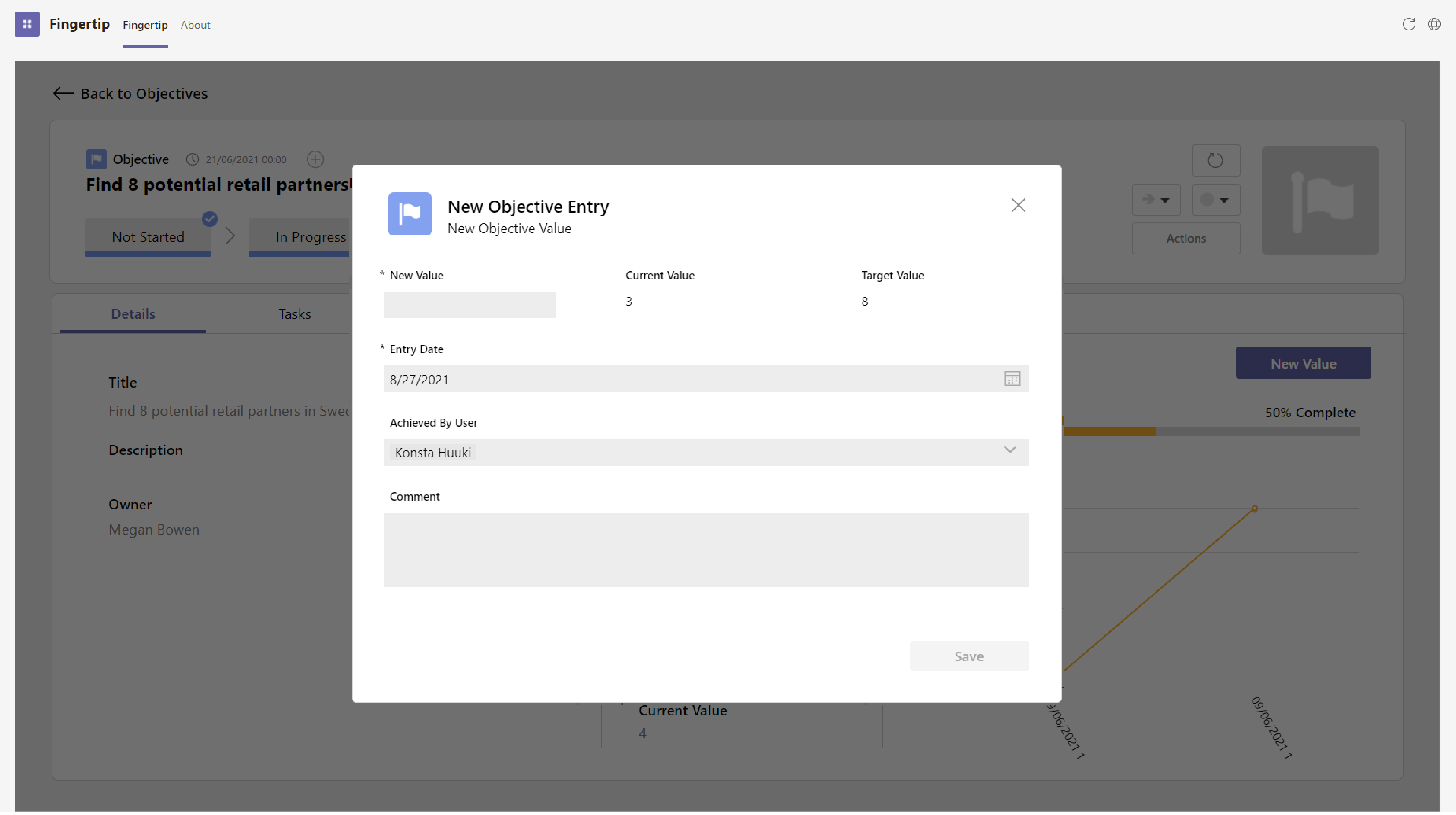
How to manage objectives in a decision



6. To update the objective value, click on ”New value”

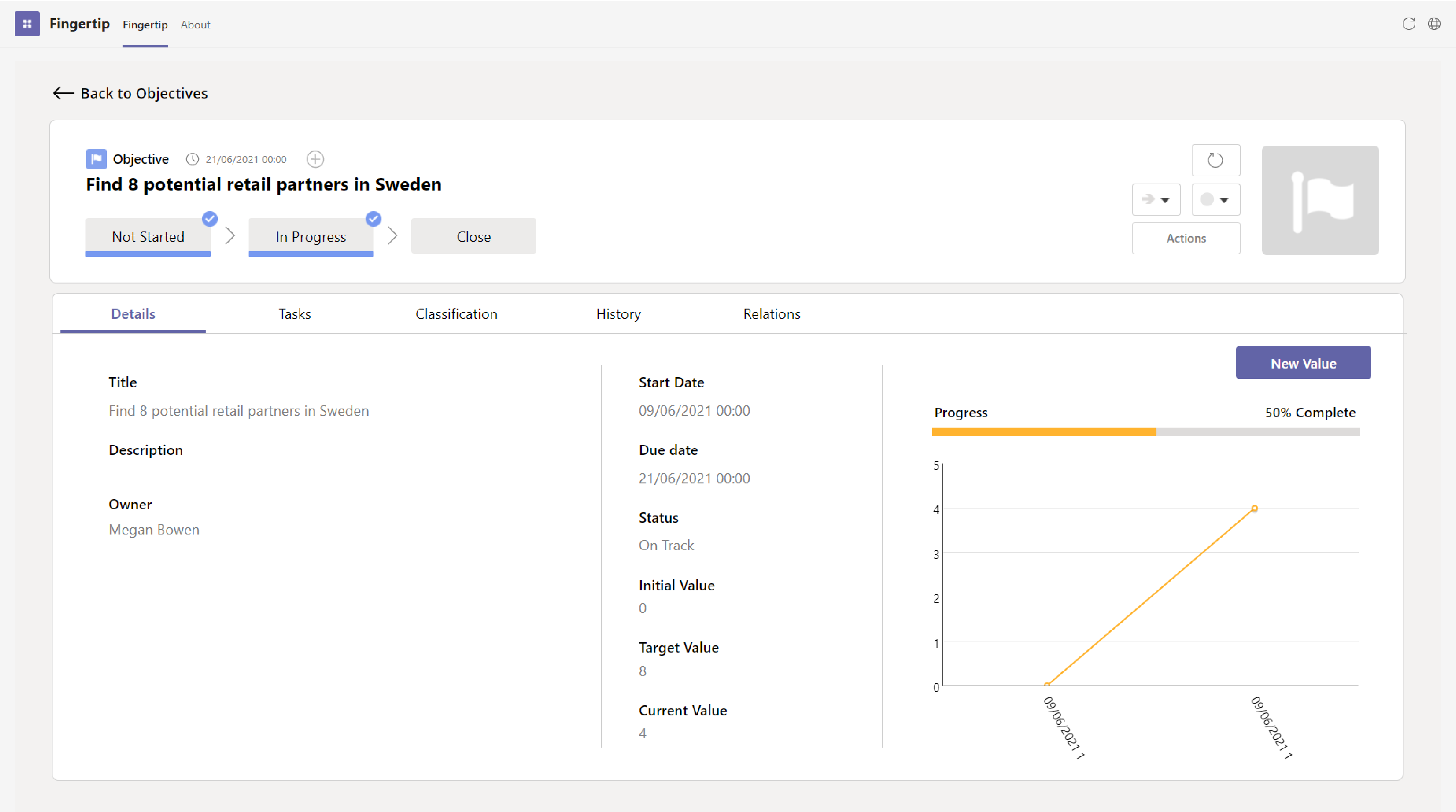
FINGERTIP

How to manage objectives in a decision



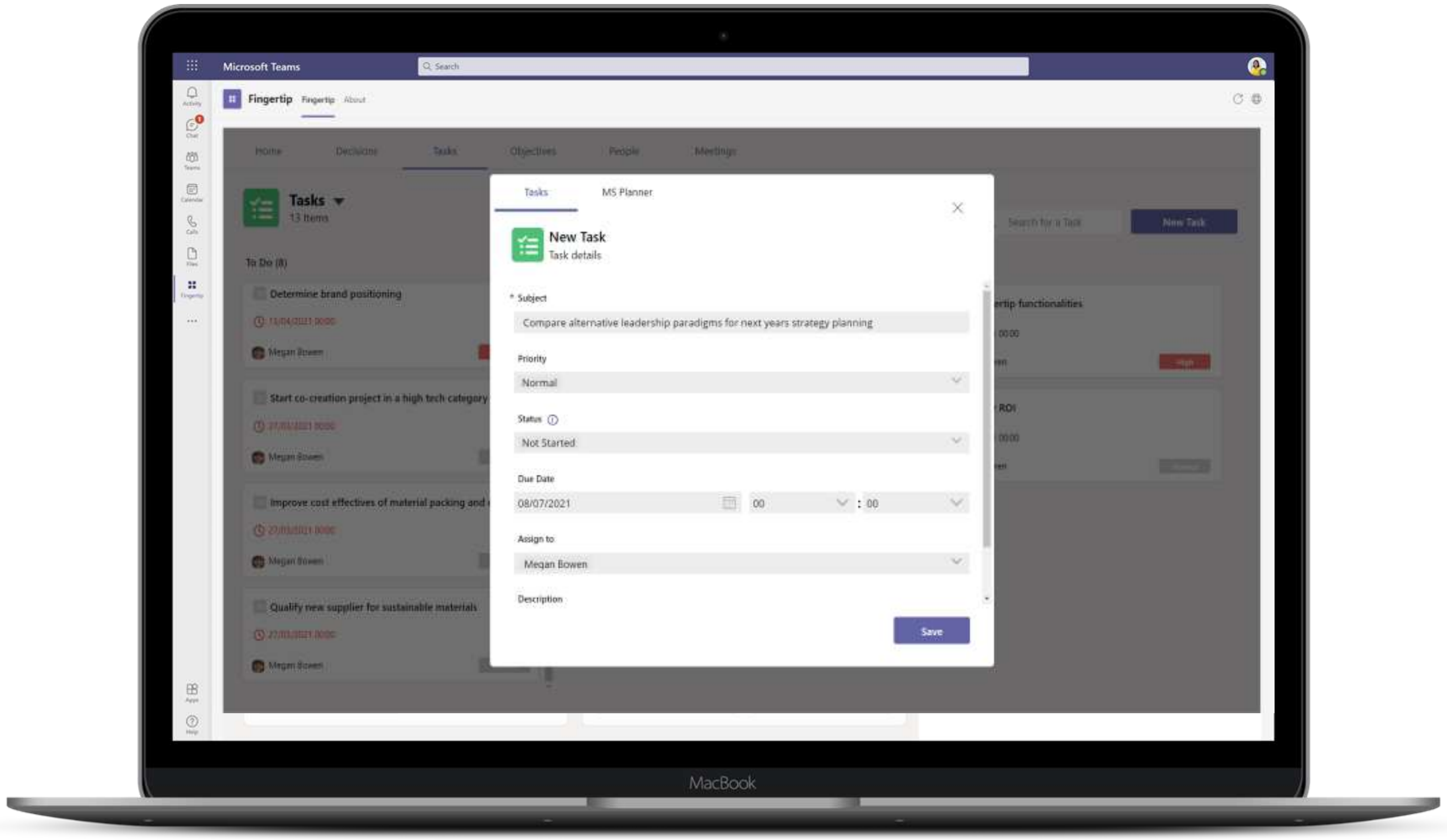
7. Enter the updated value for the objective, as well as the date it was achieved on

How to manage objectives in a decision



8. Done! The chart will visualize your objective process over time.

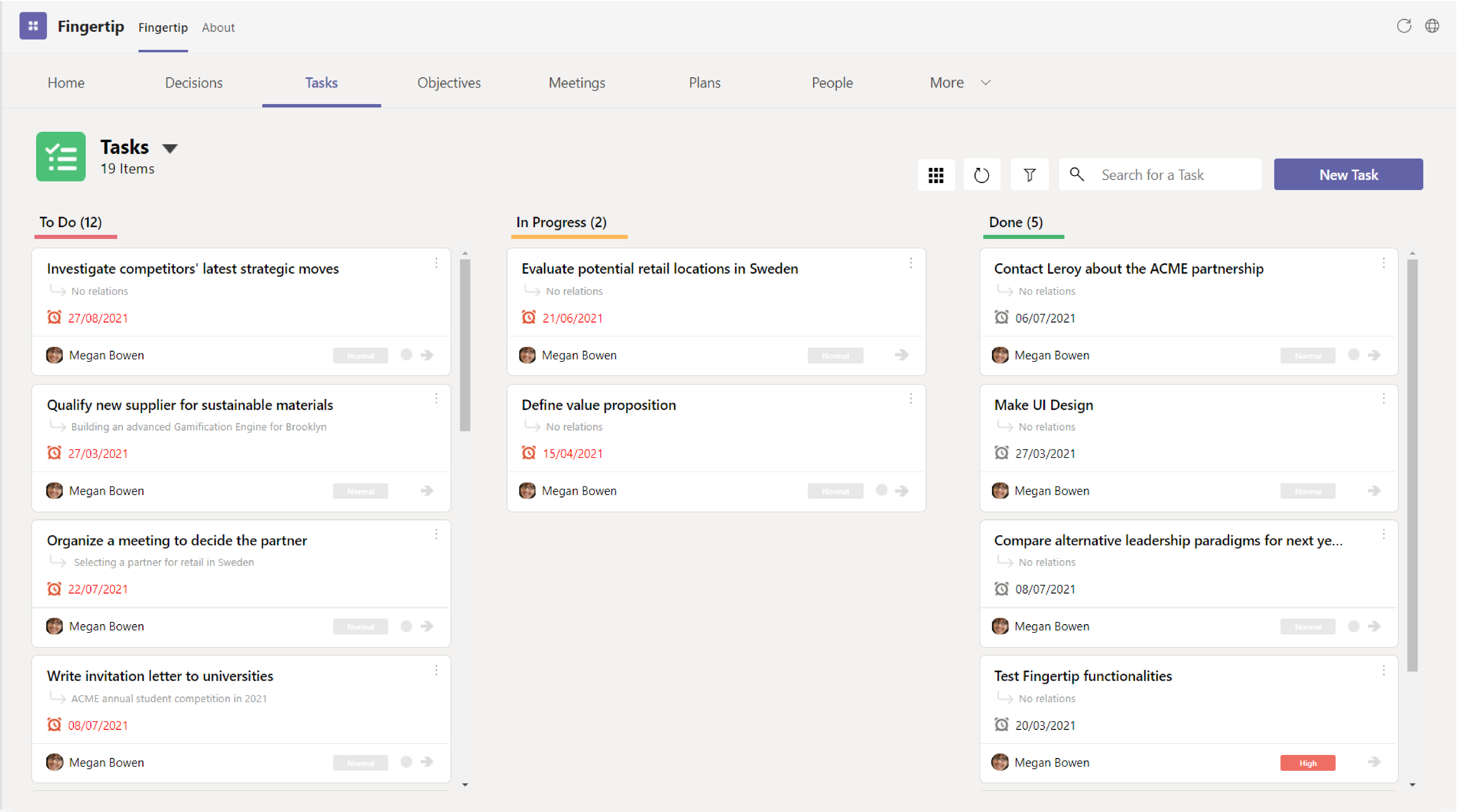
FINGERTIP



How to create a task

FINGERTIP

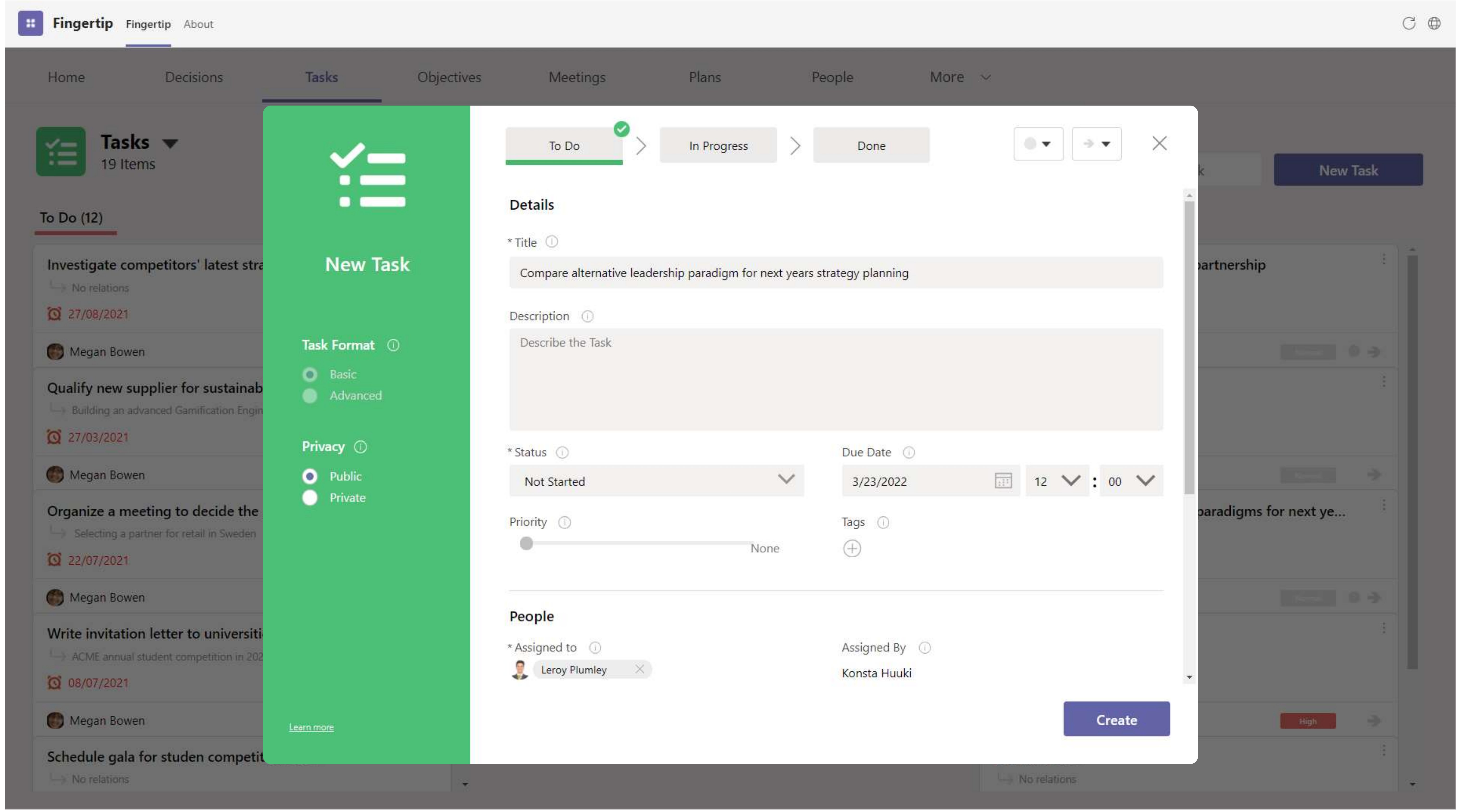
How to create a task



1. Create a new general task from the home page or the Tasks tab by clicking on ”New Task”

FINGERTIP

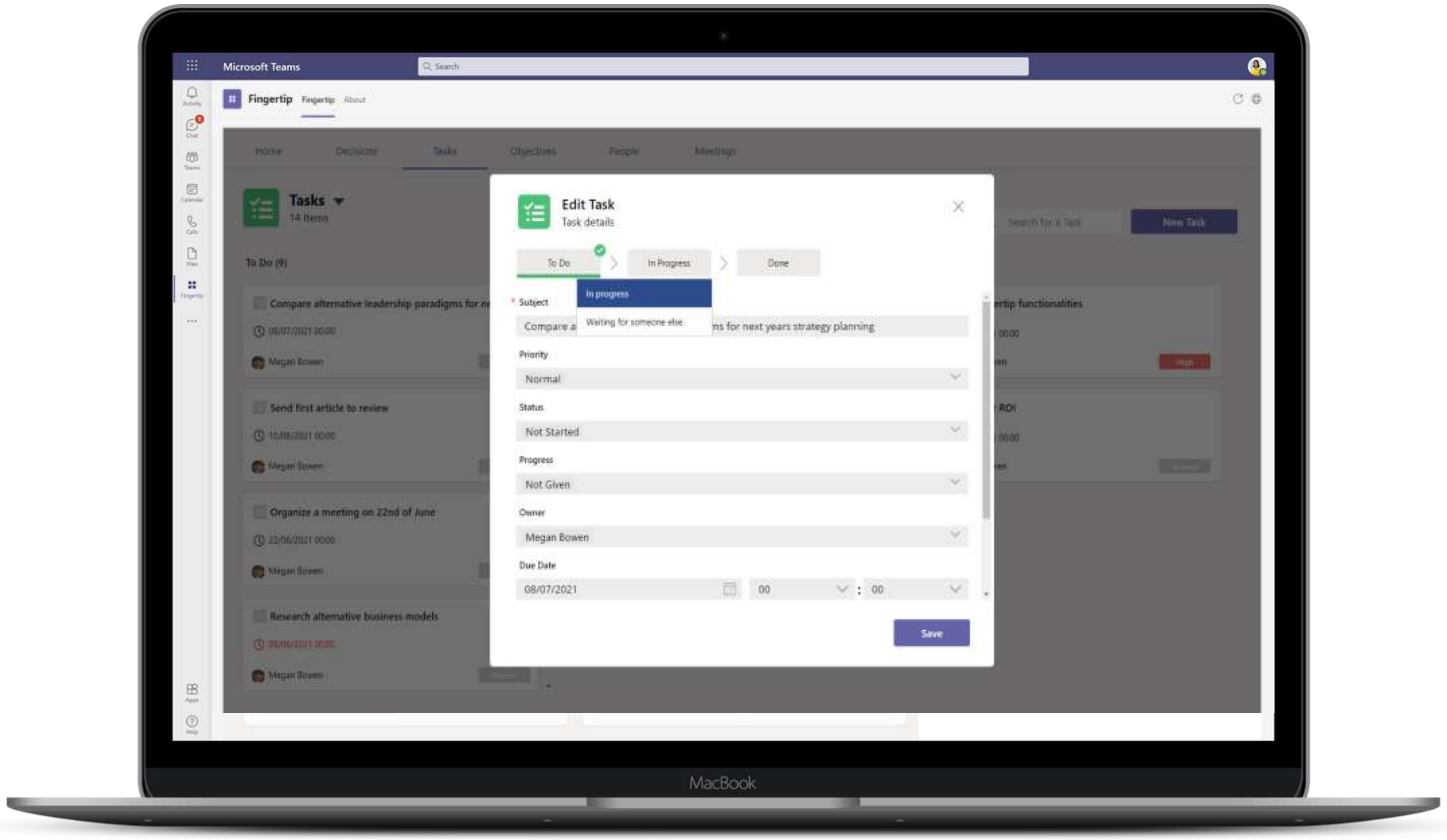
How to create a task



2. Submit the required details: Subject, task owner and due date. Select whether you want to make the task public to everyone, and add more details in the description if needed.

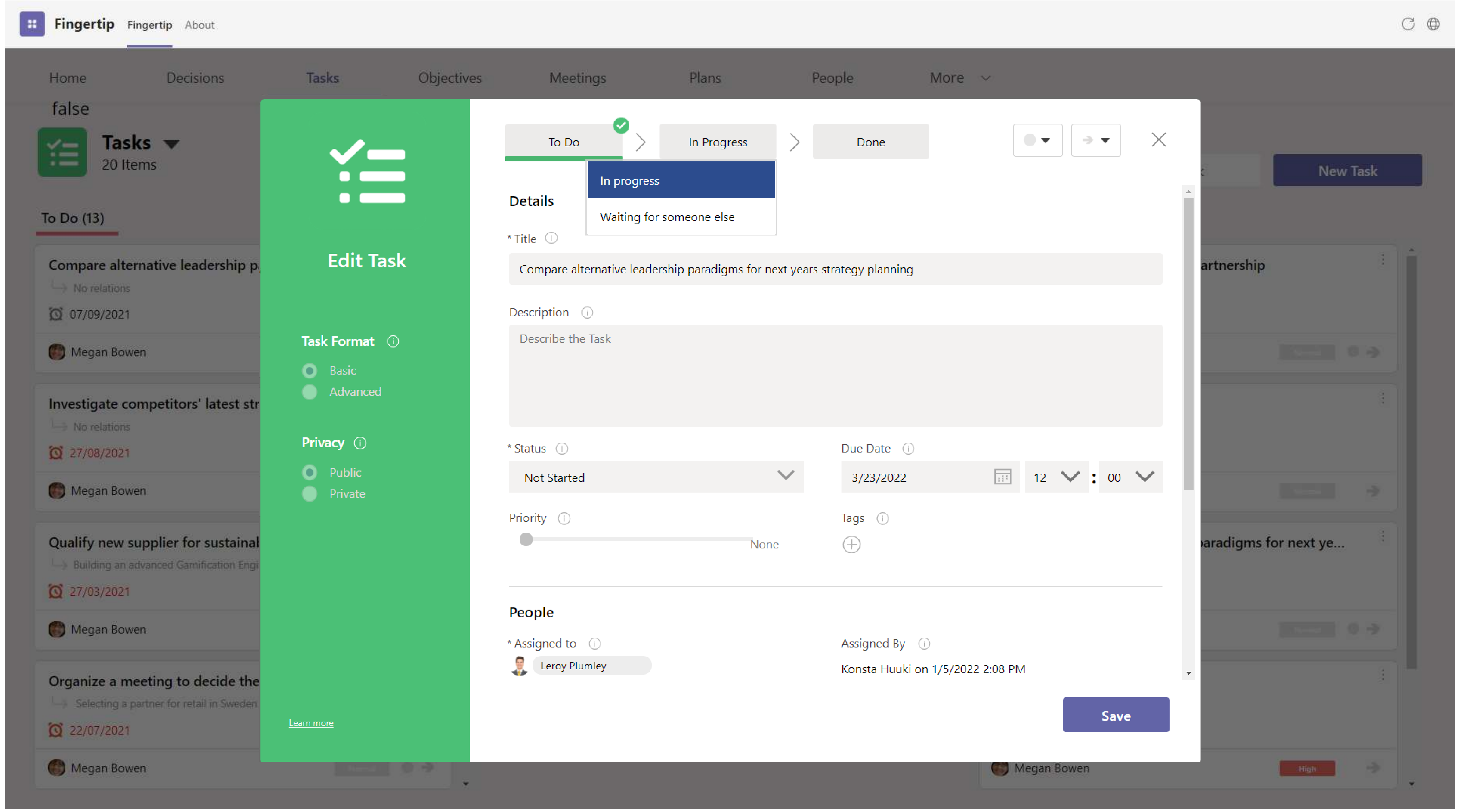
3. Click ”Create” and you’re done!

FINGERTIP



How to update a task

How to update a task

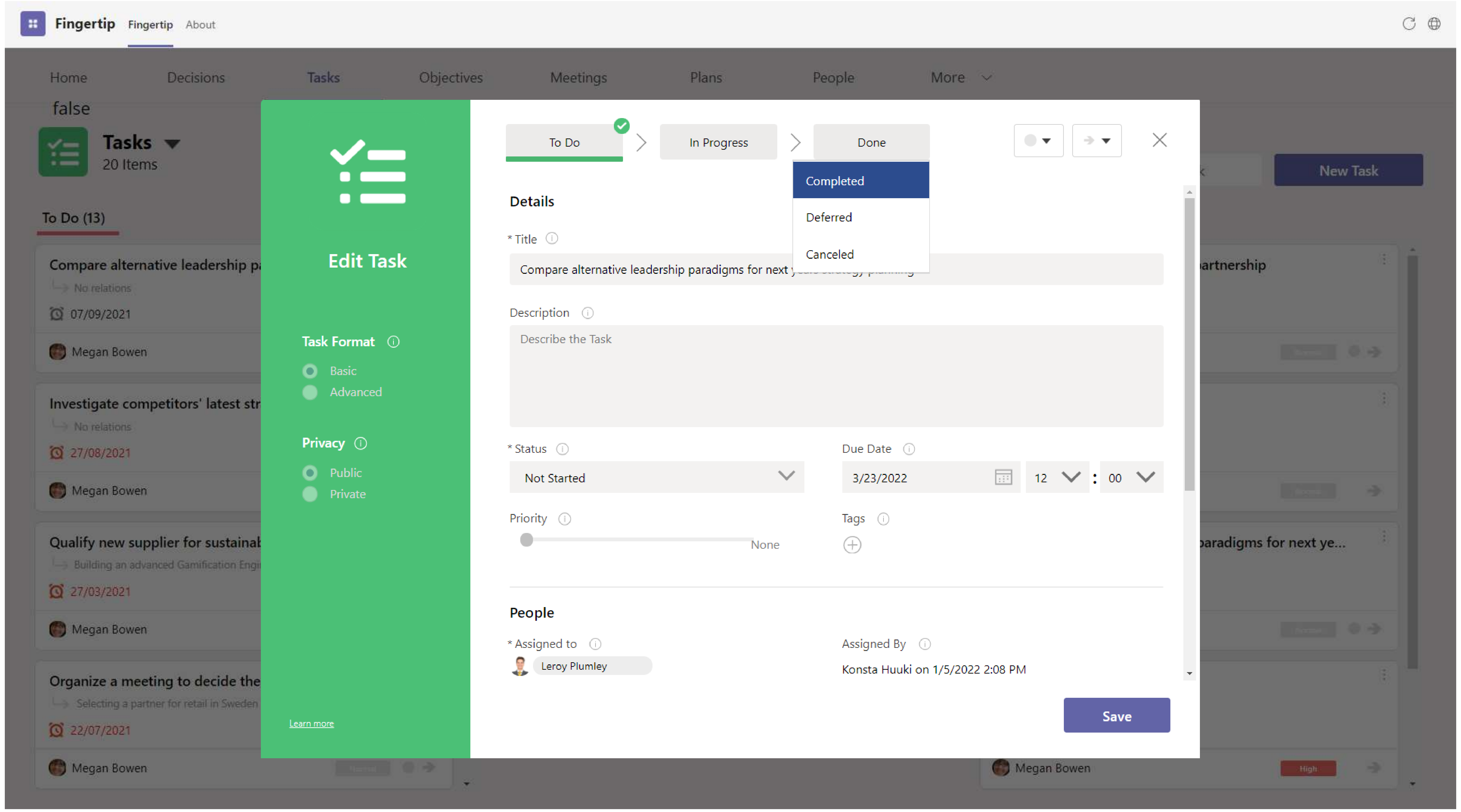


1. Open a task you want to update from the Kanban view in the Tasks tab.
2. Click on another stage on the life cycle, and select if the task is being done by you, or if you're waiting on someone else.

You can also use the "Status" drop down menu to select current stage.

FINGERTIP

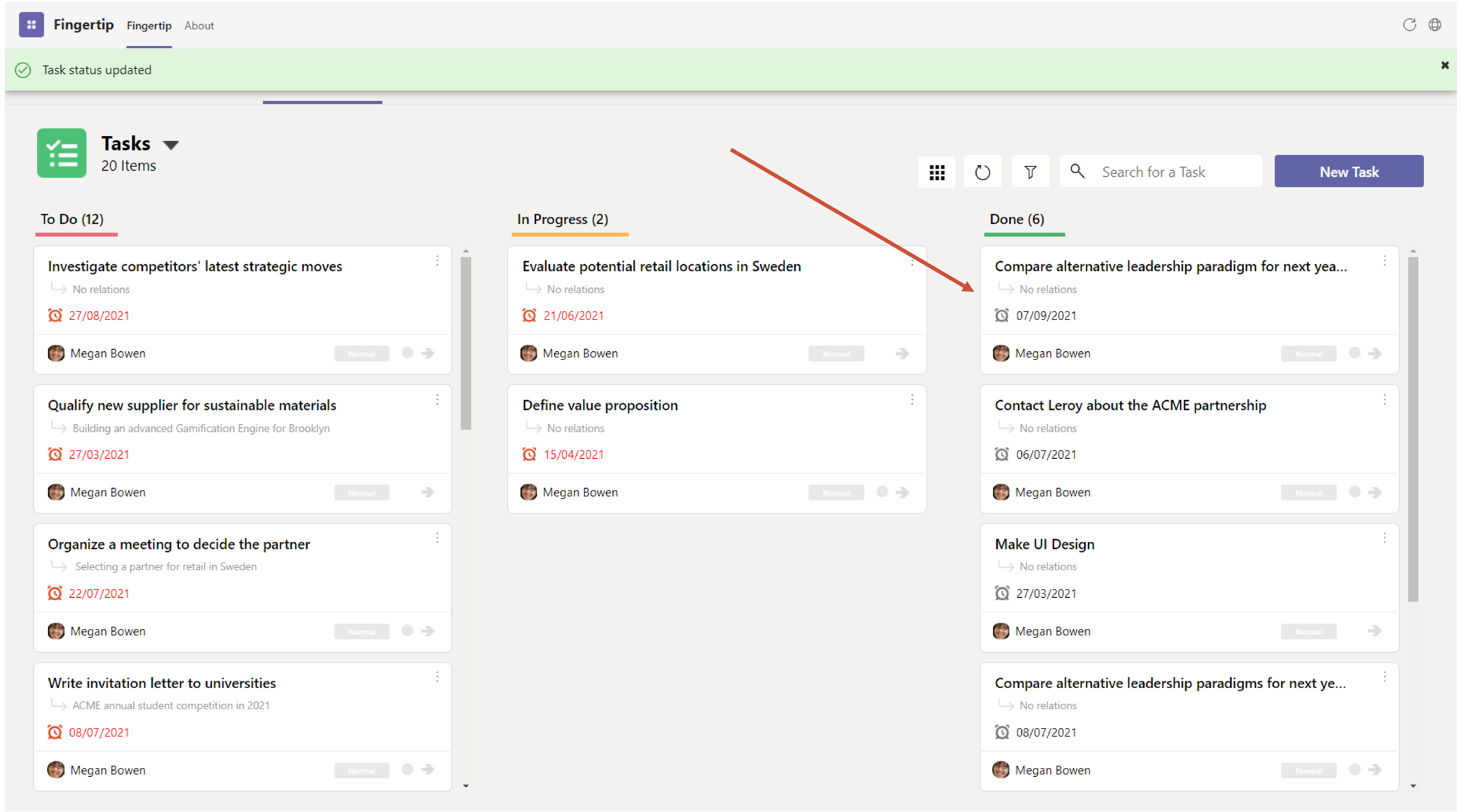
How to update a task



3. To complete a task, open it and click on the ”Done” stage, and select if the task was completed, deferred or cancelled.

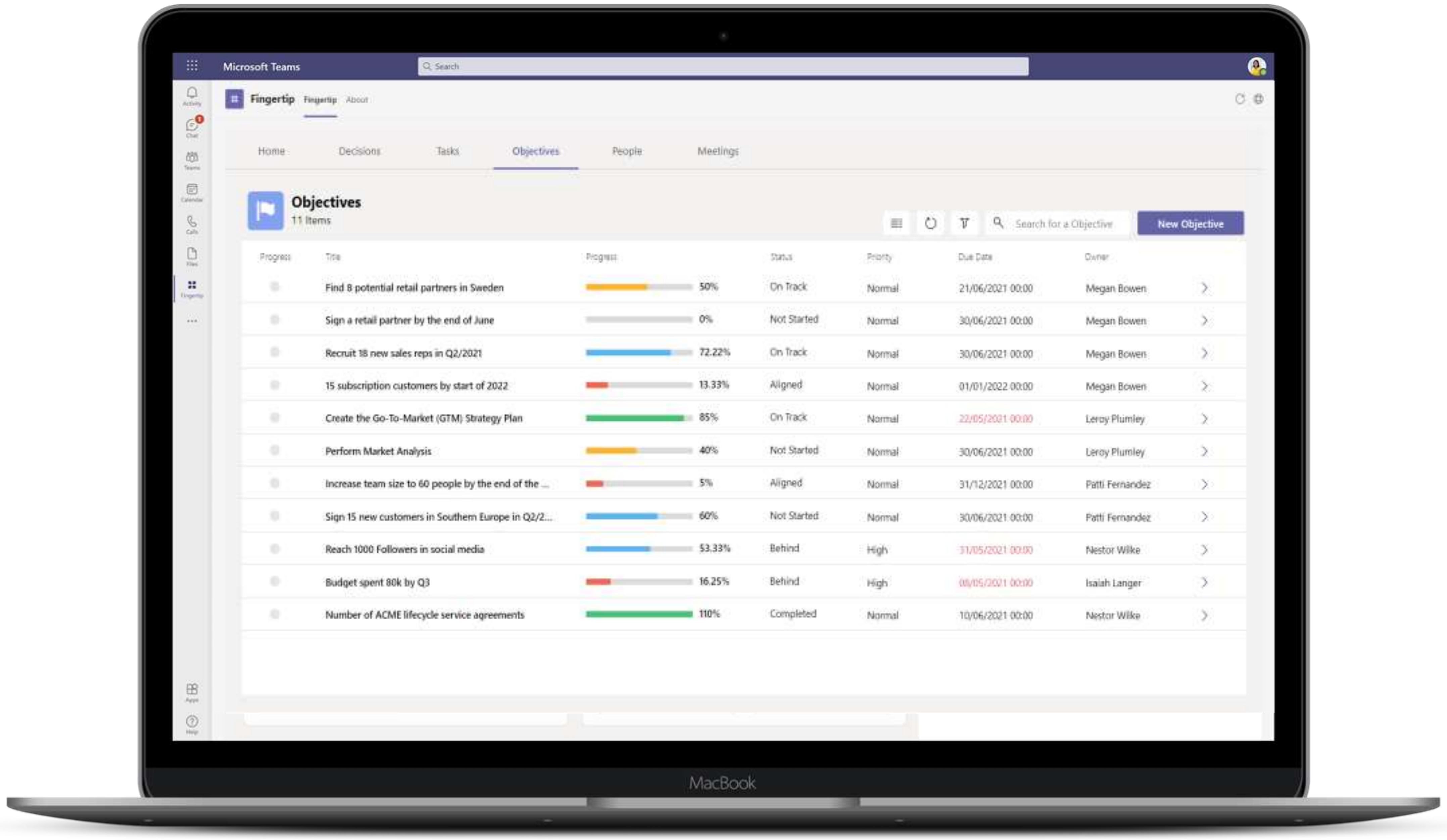
FINGERTIP

How to update a task



4. The Kanban view on the Tasks tab visualizes your task progress instantly!

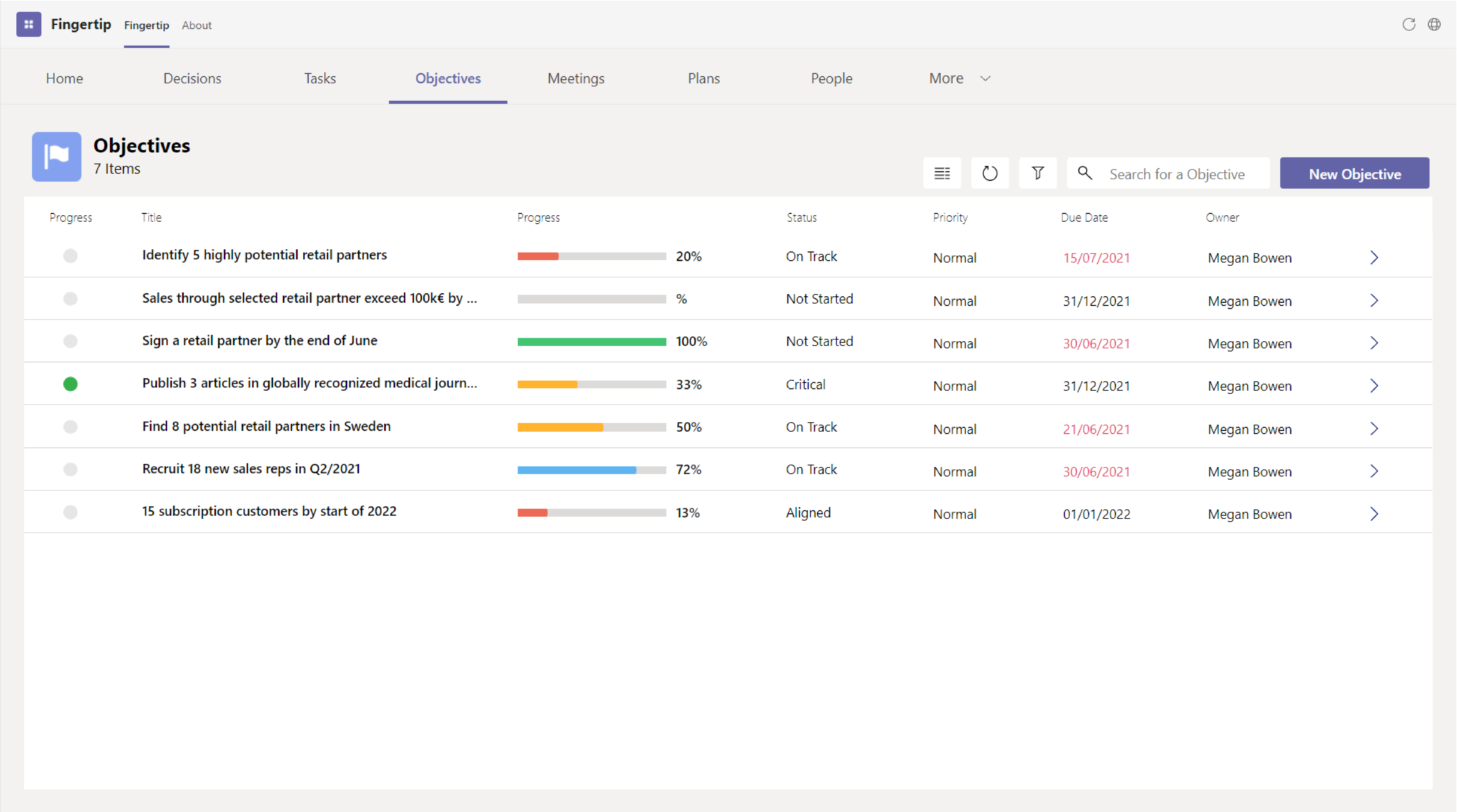
FINGERTIP



How to create an objective

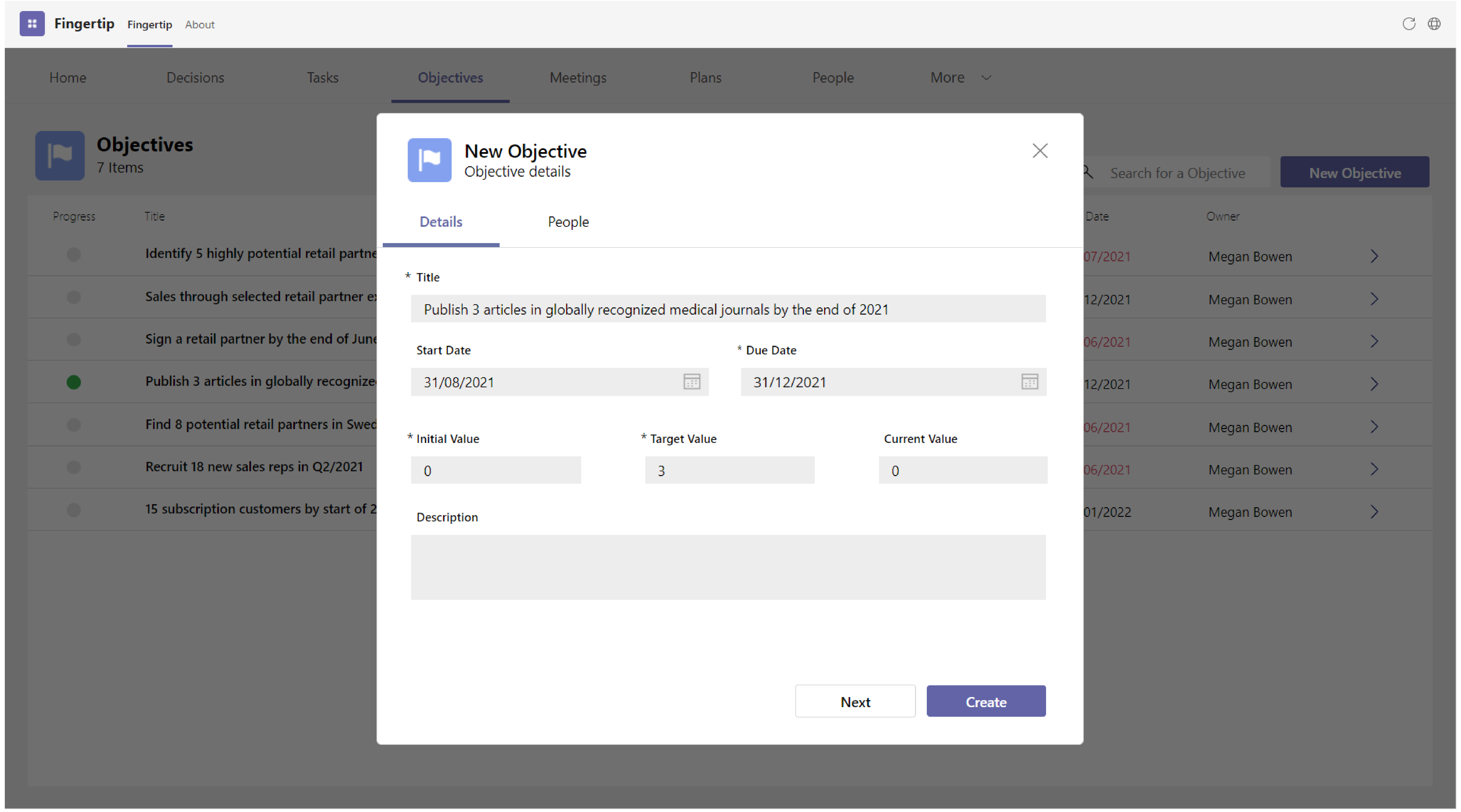
FINGERTIP

How to create an objective



1. Create a new general objective from the home page or the Objectives tab by clicking on ”New Objective”

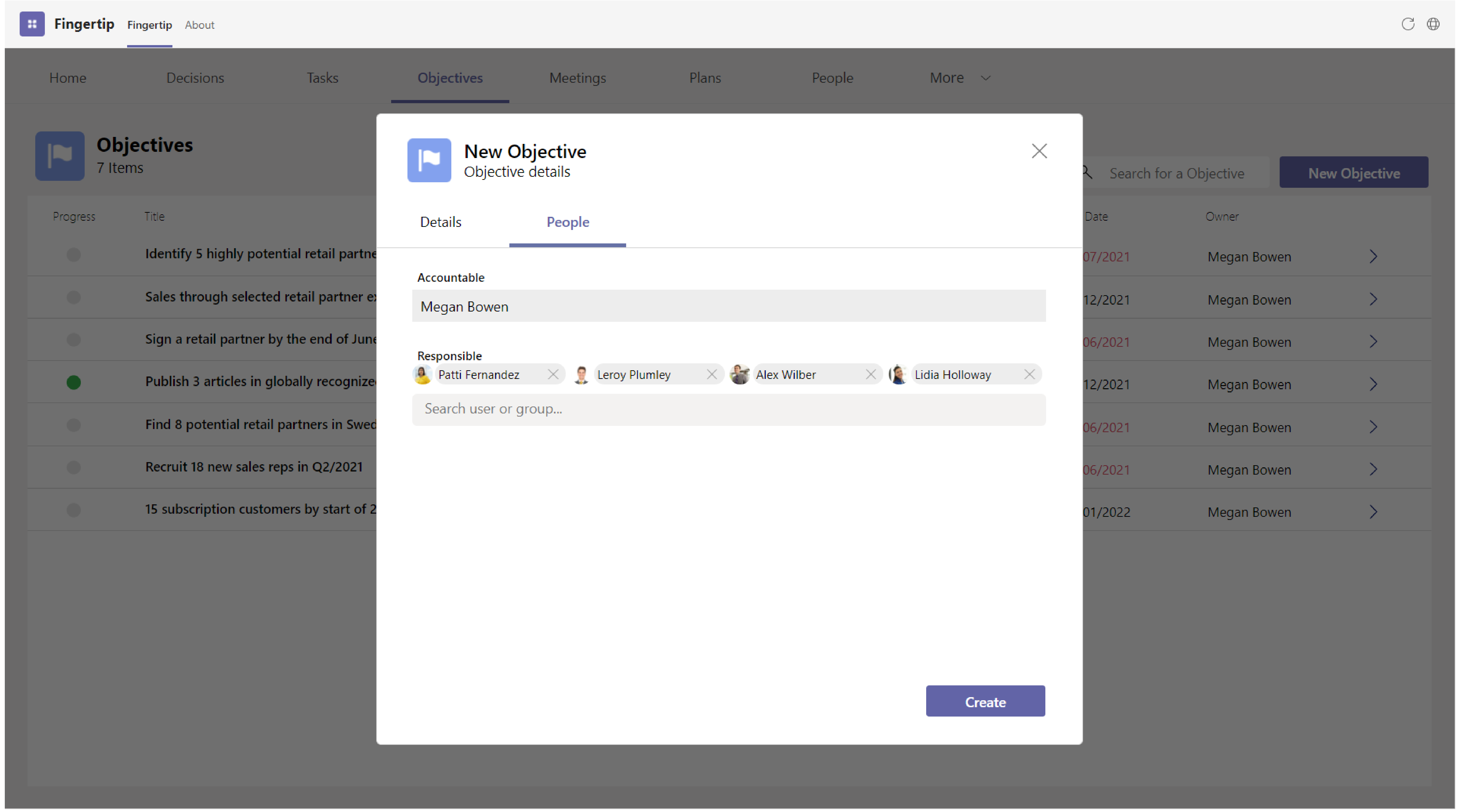
How to create an objective



2. Insert the required inputs: Title, start date, due date, initial value, target value and current value. You can also put additional details in the description field.

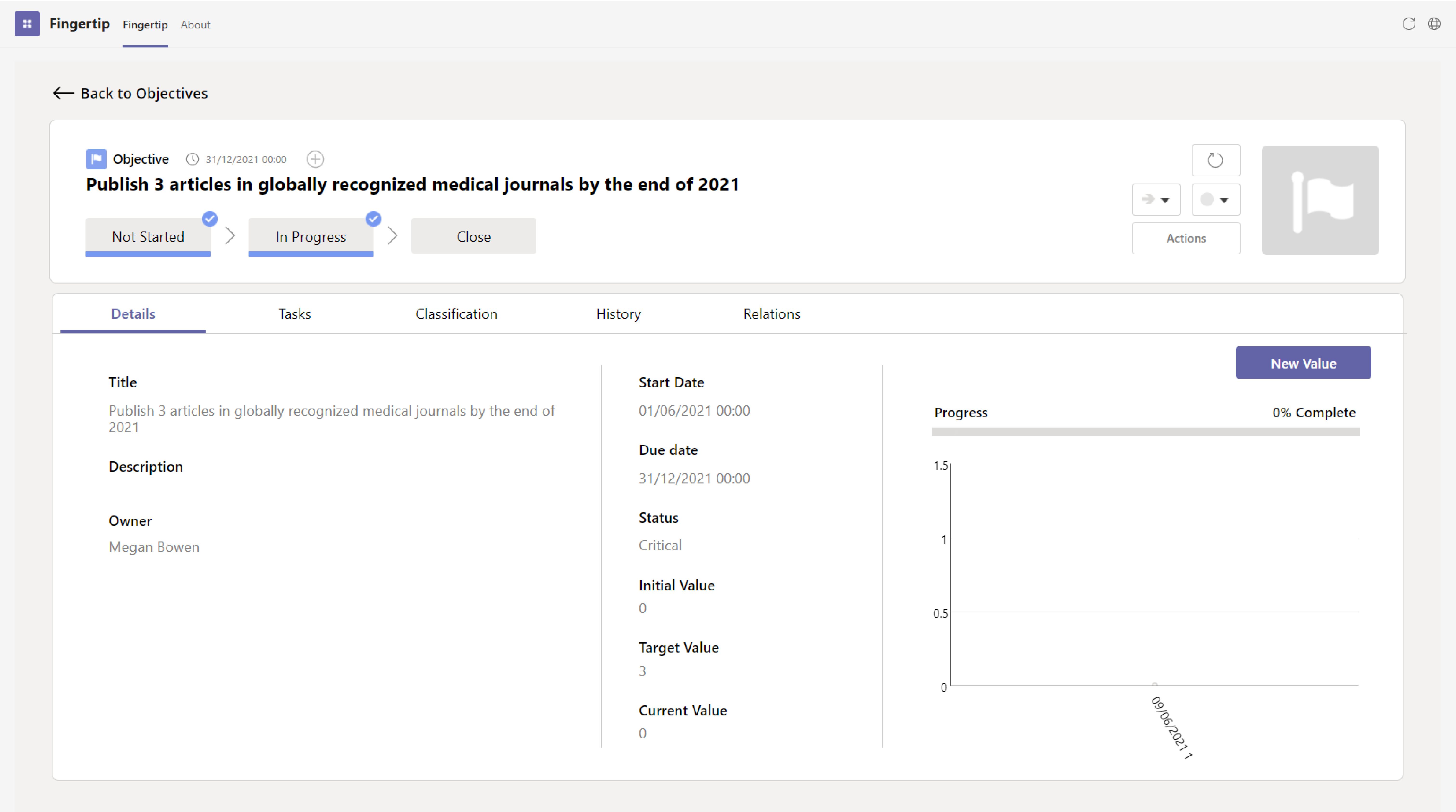
FINGERTIP

How to create an objective



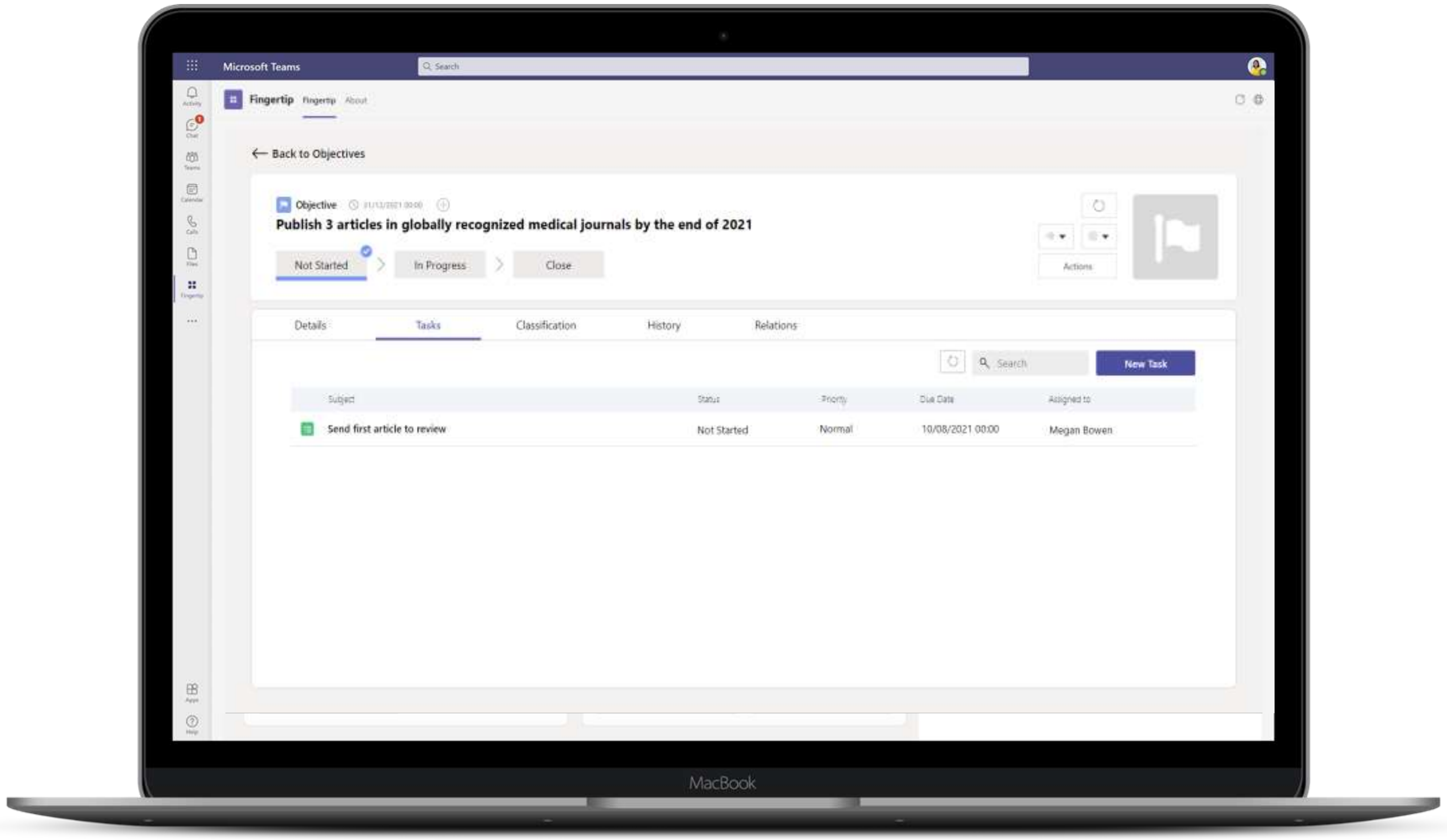
3. Select who to share the objective with – who are responsible alongside you to ensure the objective is reached.

How to create an objective



3. Done! Remember to update the objective value to let people know how you're progressing.

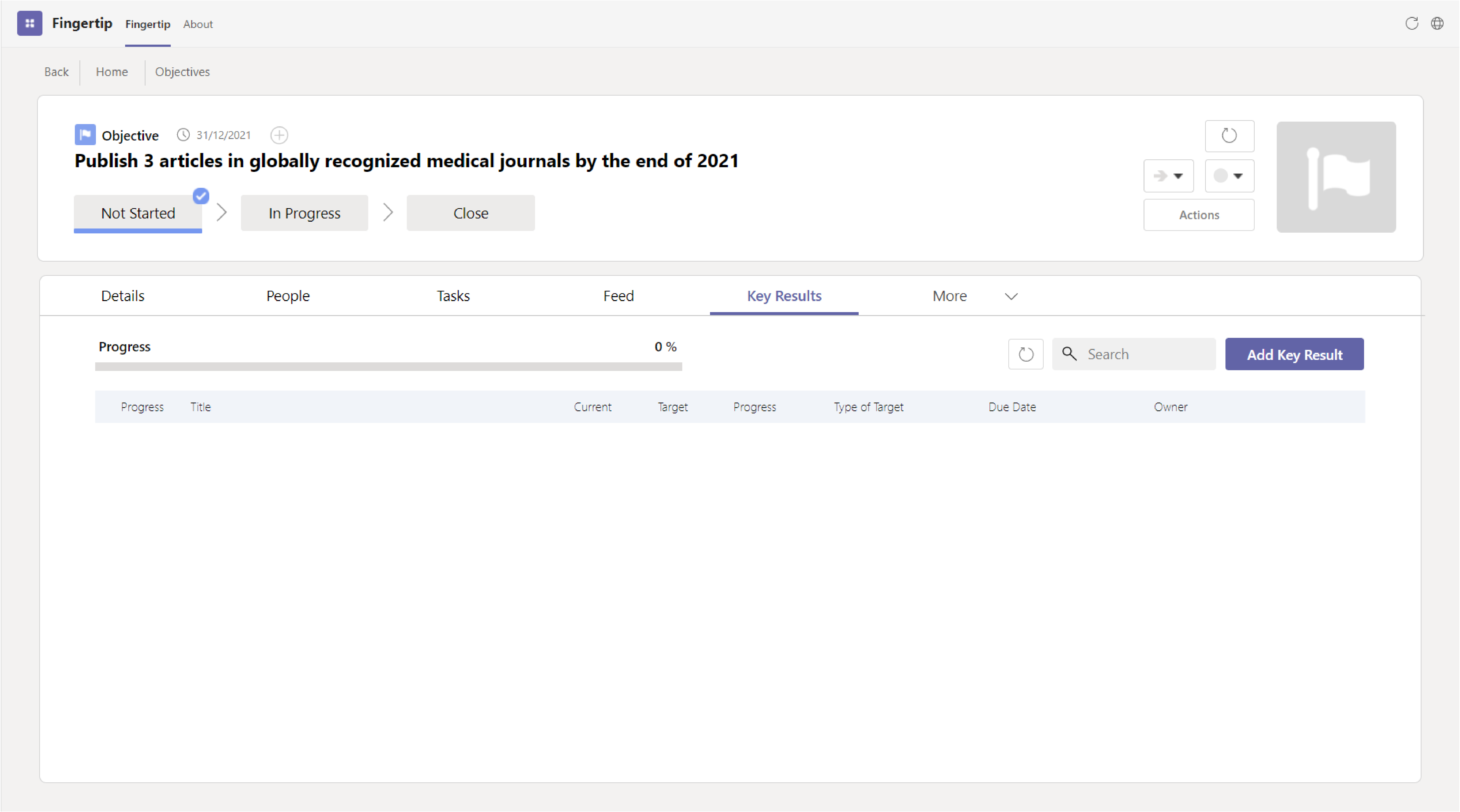
FINGERTIP



How to use key results for an objective

FINGERTIP

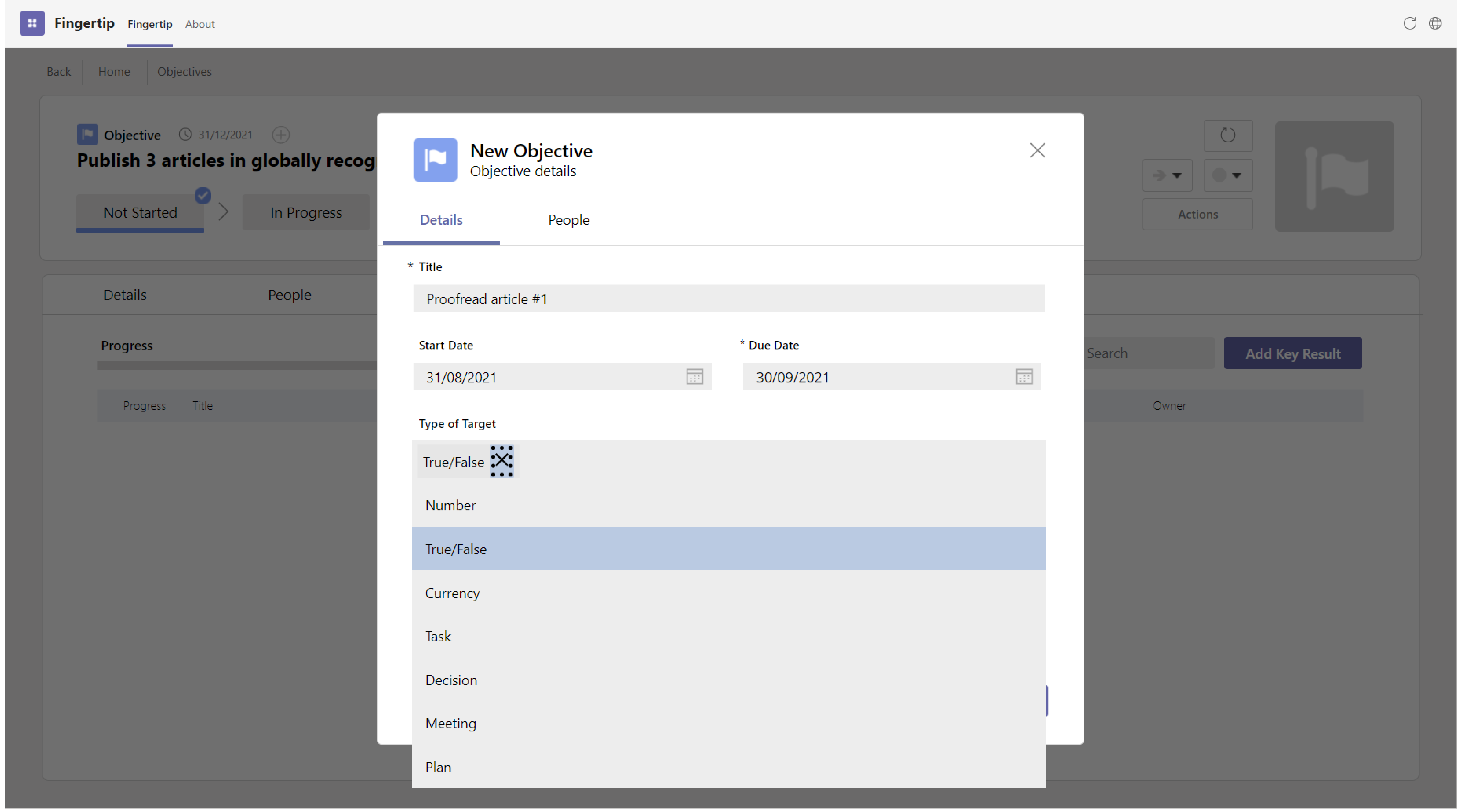
How to use key results for an objective



1. If you're following the OKR methodology, you can add Key Results to your objective from the Key Results tab

FINGERTIP

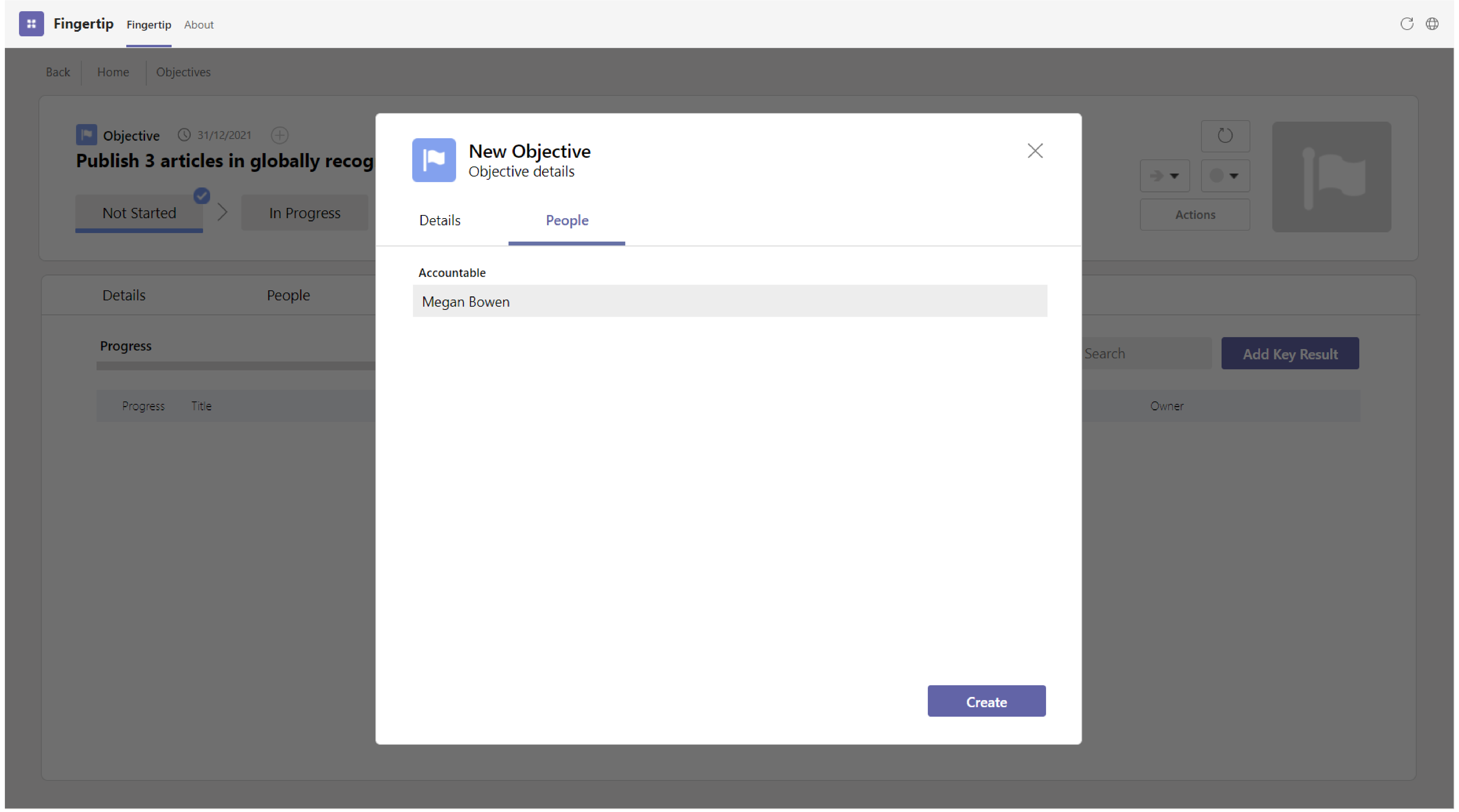
How to use key results for an objective



2. Press the add key results button, insert a title for your key results, set the timing, and select a type of target you are looking to achieve.

FINGERTIP

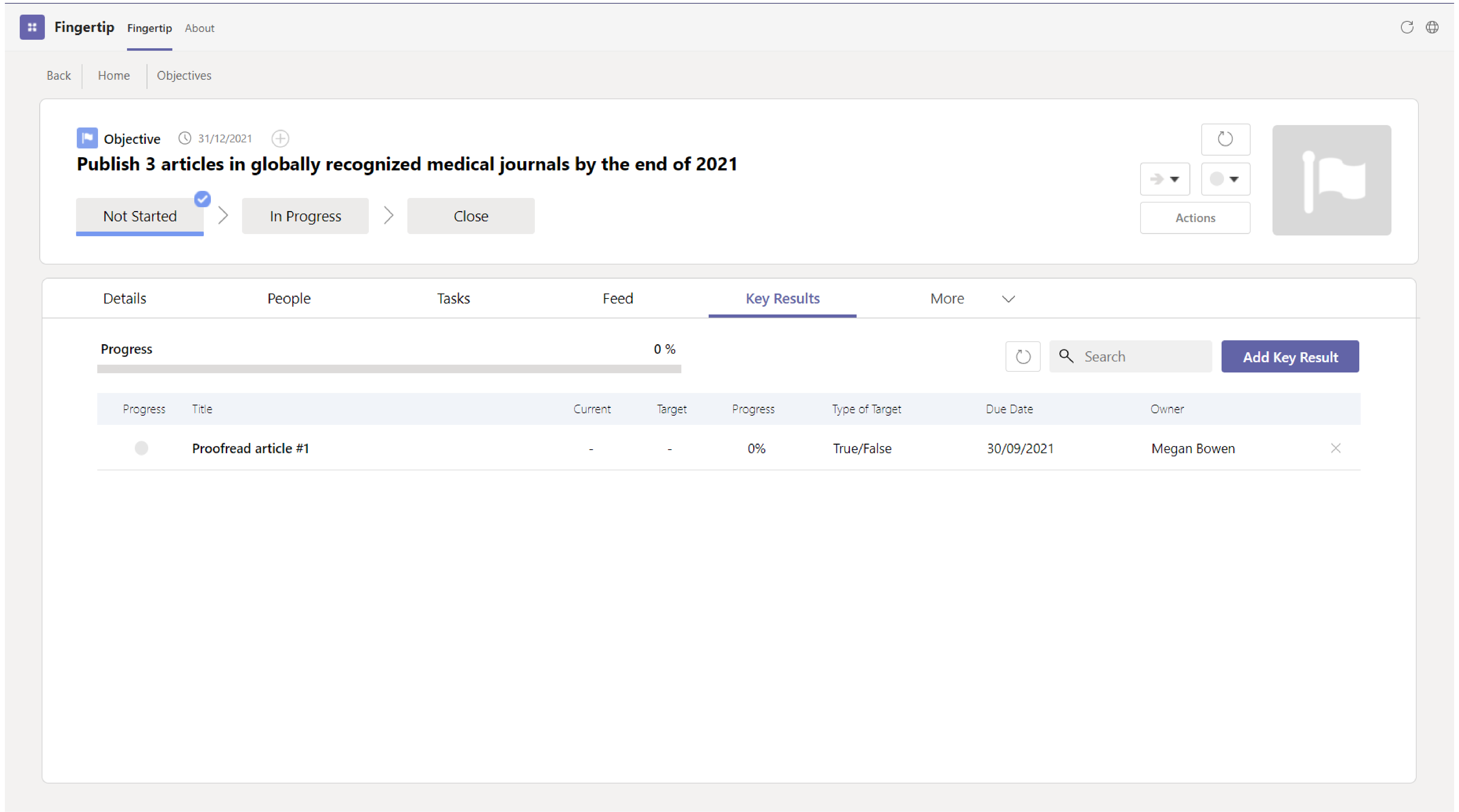
How to use key results for an objective



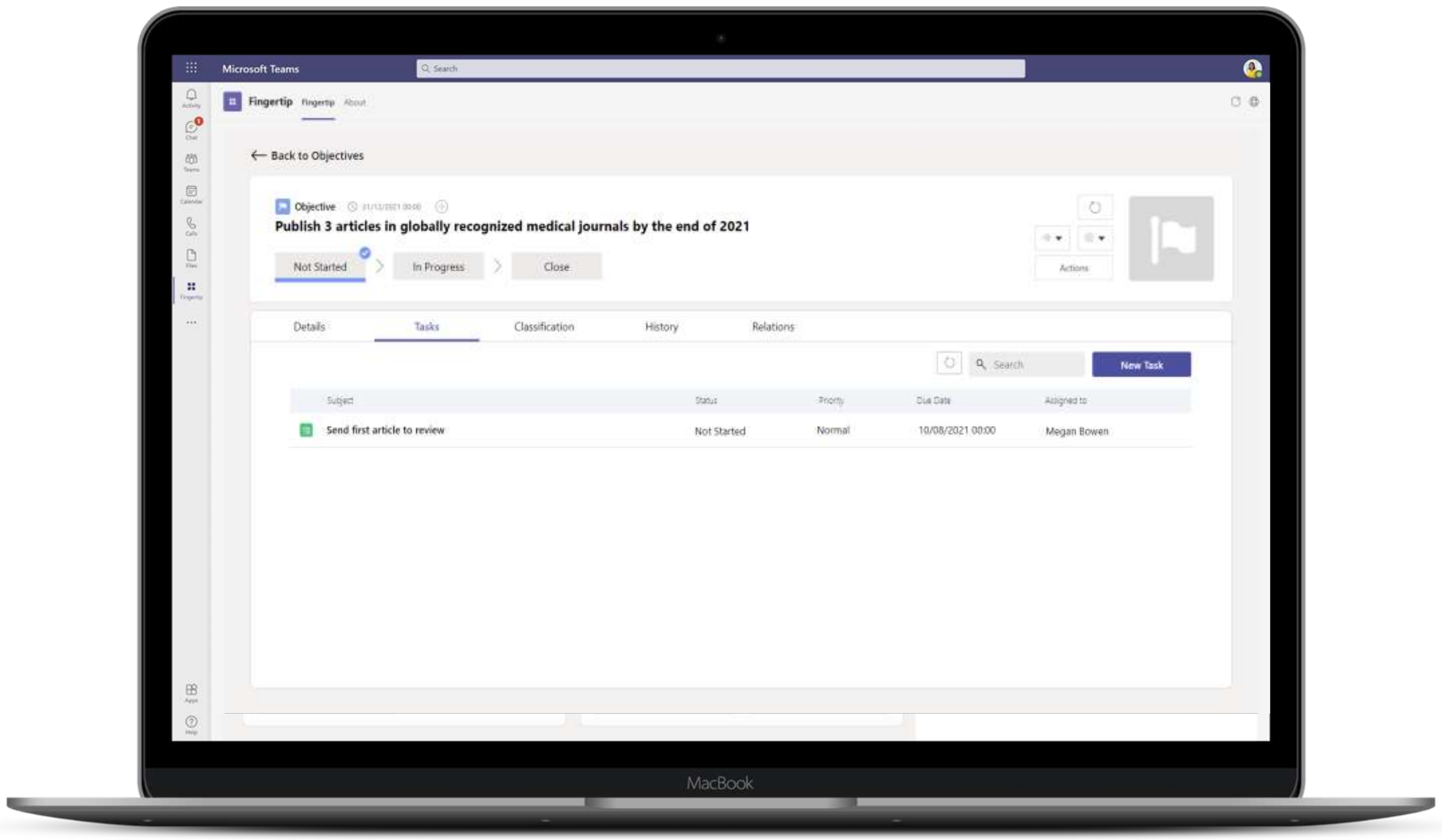
3. Set the accountable and press Create to share the key result with other people responsible for the objective

FINGERTIP

How to use key results for an objective



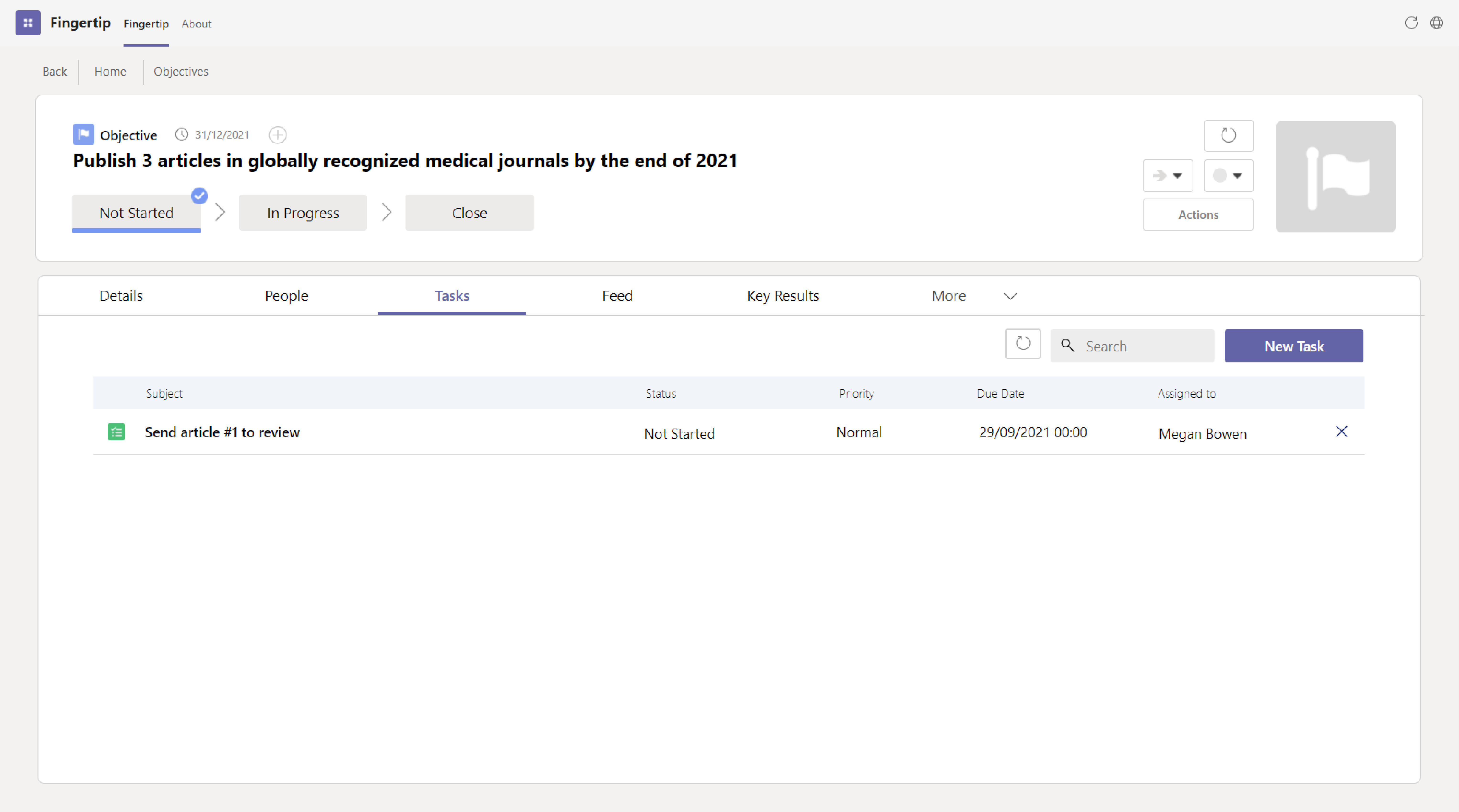
4. Done! Key result progresses are calculated towards the objective's total progress.



How to manage tasks in an objective

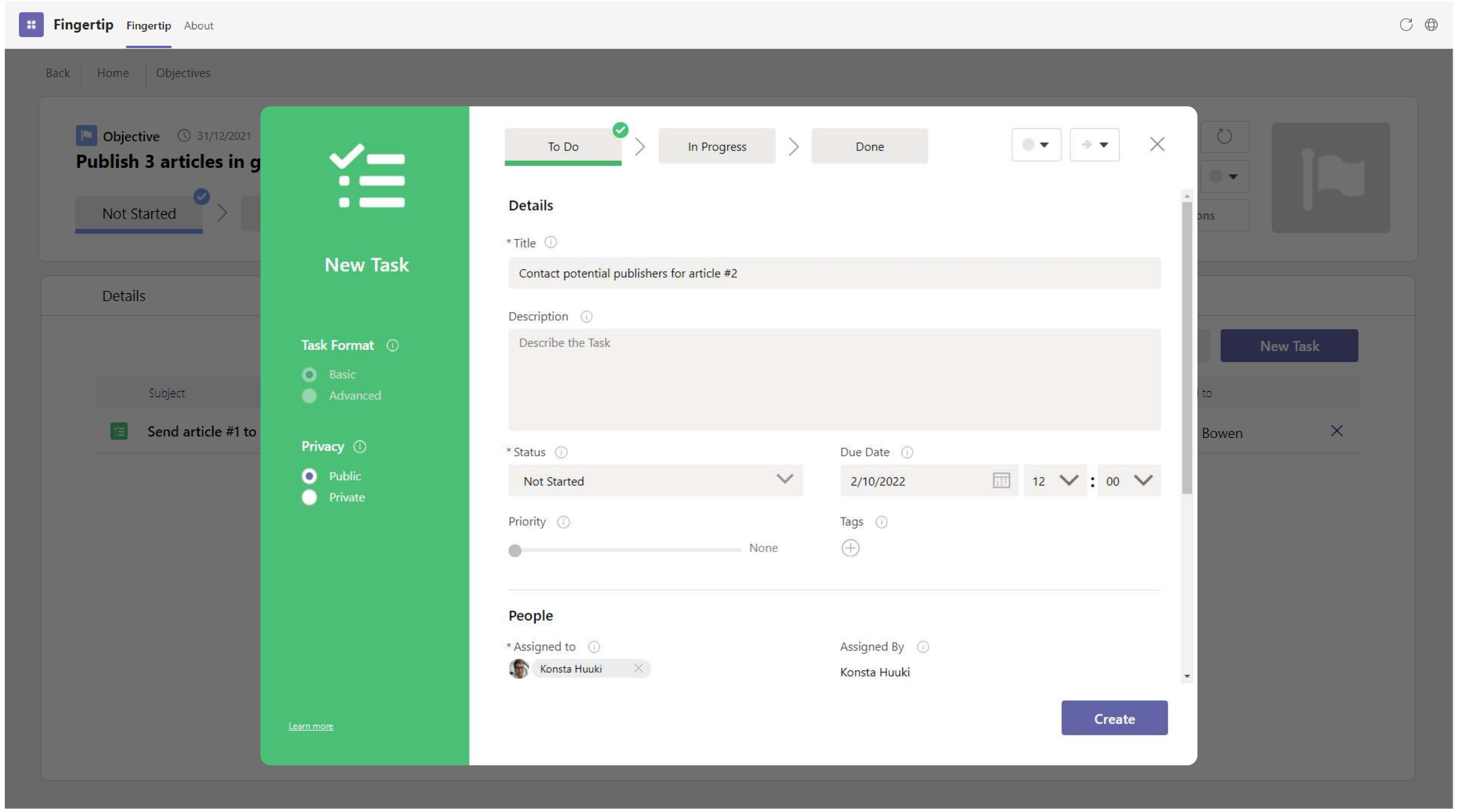
FINGERTIP.

How to manage tasks in an objective



1. You can add tasks related to an objective directly within the item. Head to the Tasks-tab and click on ”New Task” to create a new task.

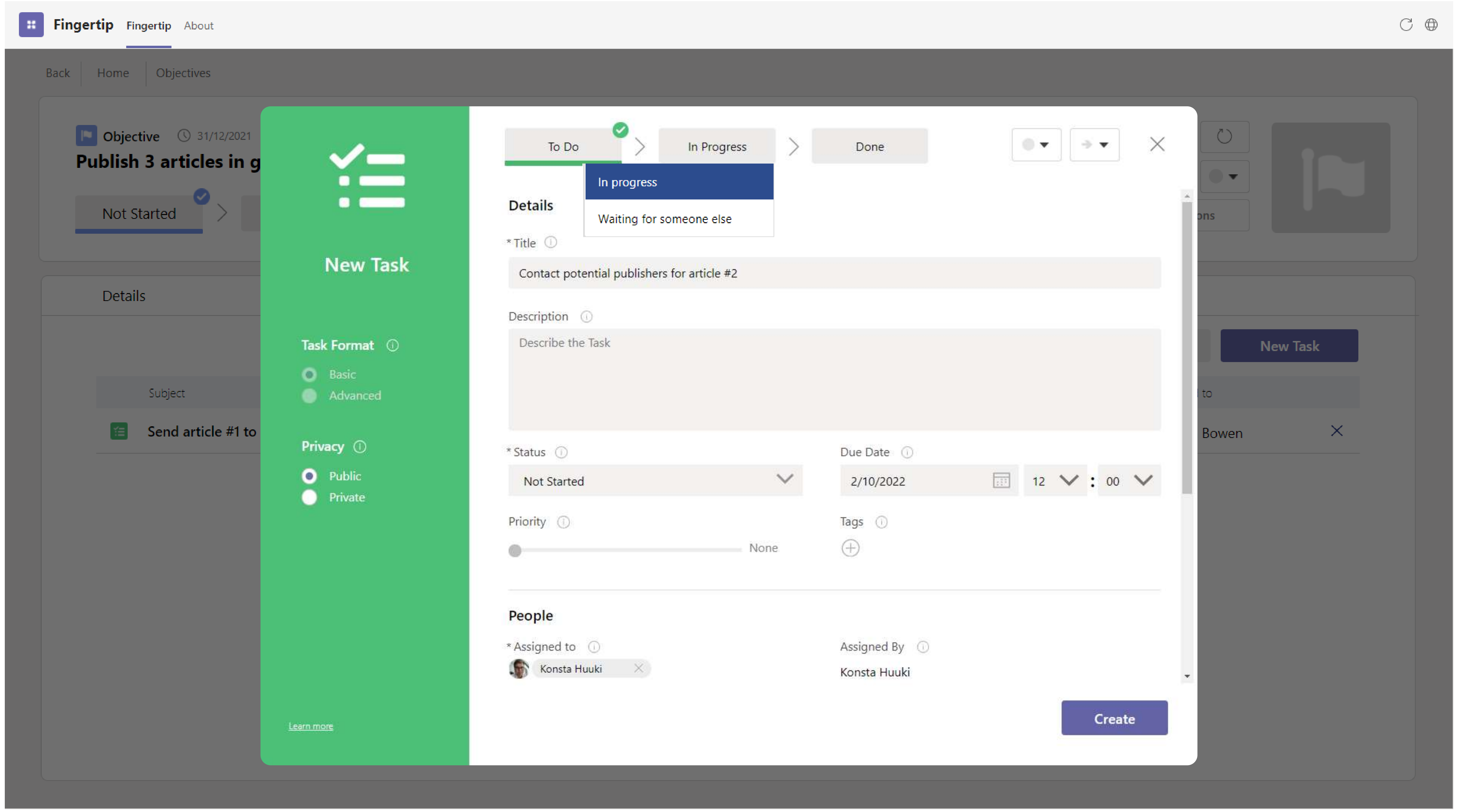
How to manage tasks in an objective



2. Create an actionable task, set a due date, priority and assignee, and click save. Any additional details may be written to the description box.

FINGERTIP

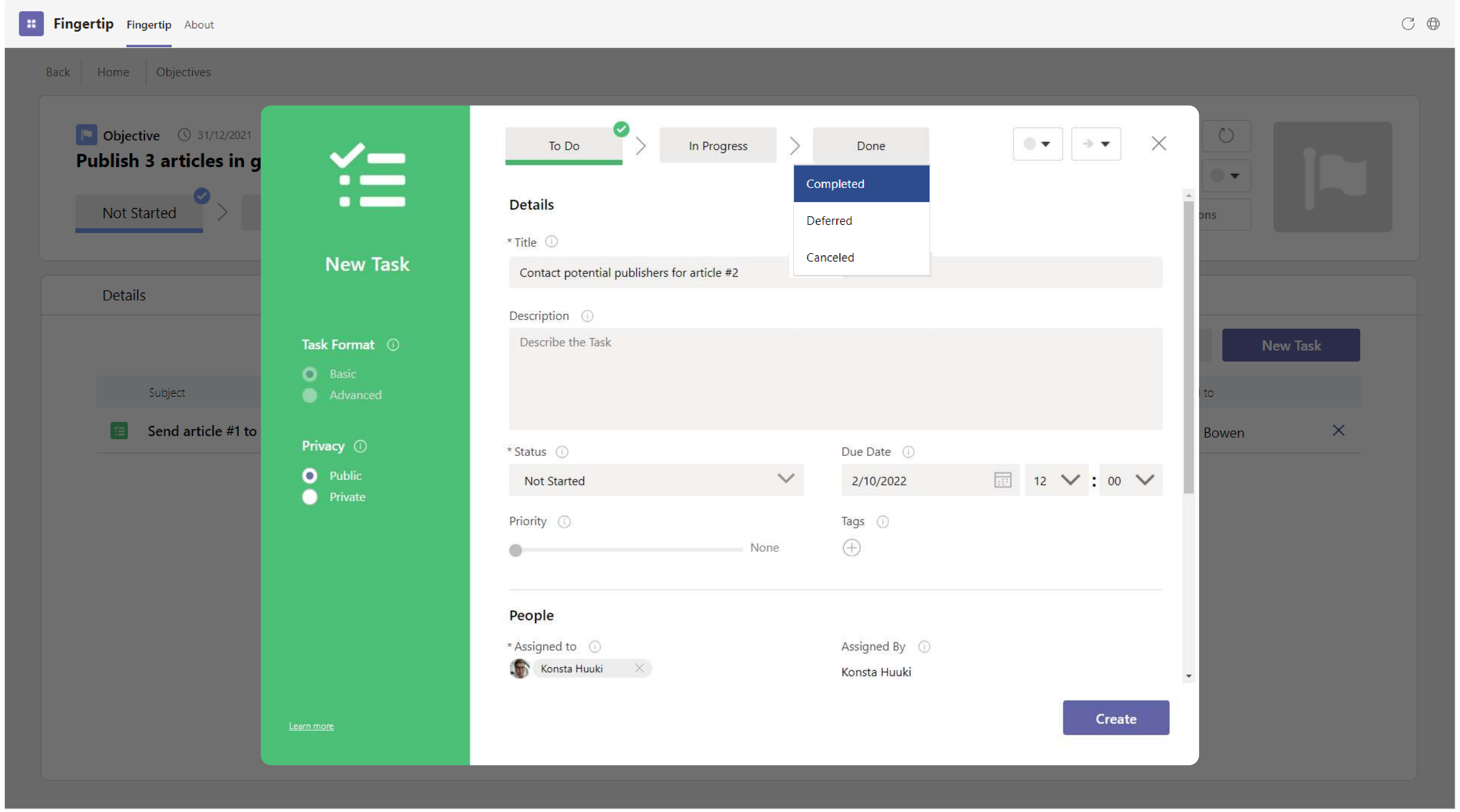
How to manage tasks in an objective



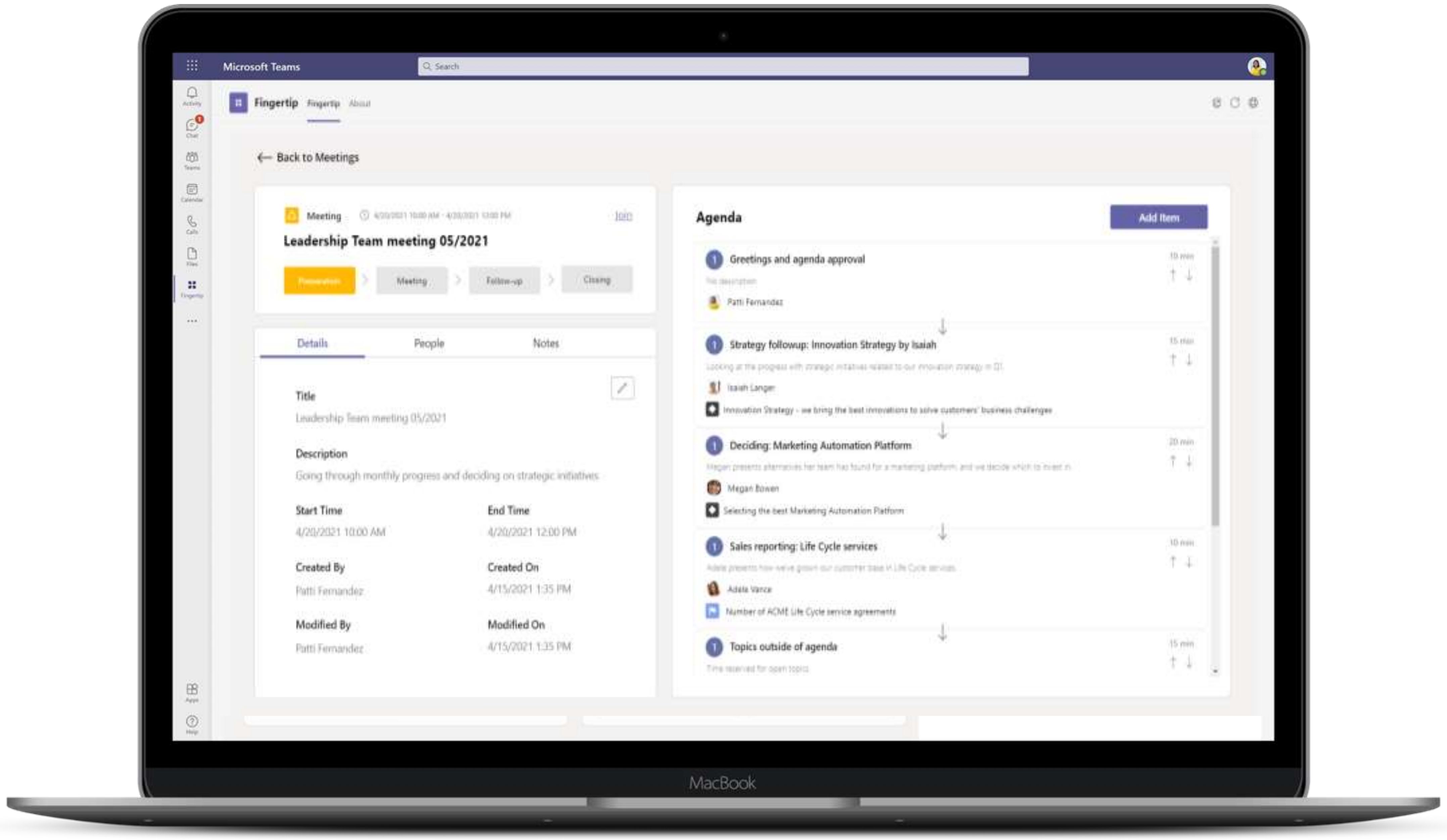
3. To update task status, just click on the task in the list and select a stage from the popup. Your task status will be instantly visible to everyone!

FINGERTIP

How to manage tasks in an objective



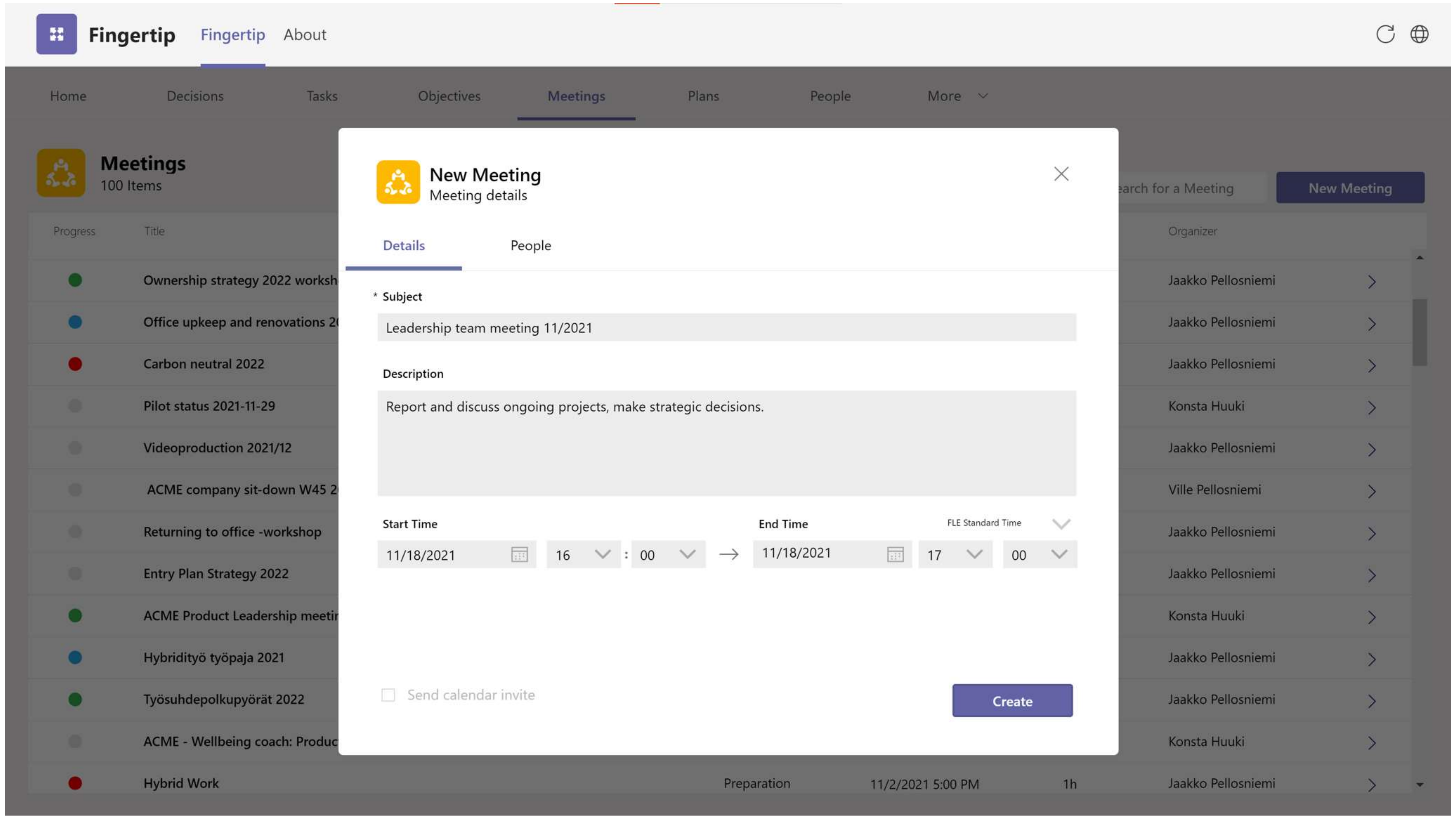
4. To complete a task, just click on the task in the list and select a closing condition for the task. Congratulations! Task complete.



How to create a meeting

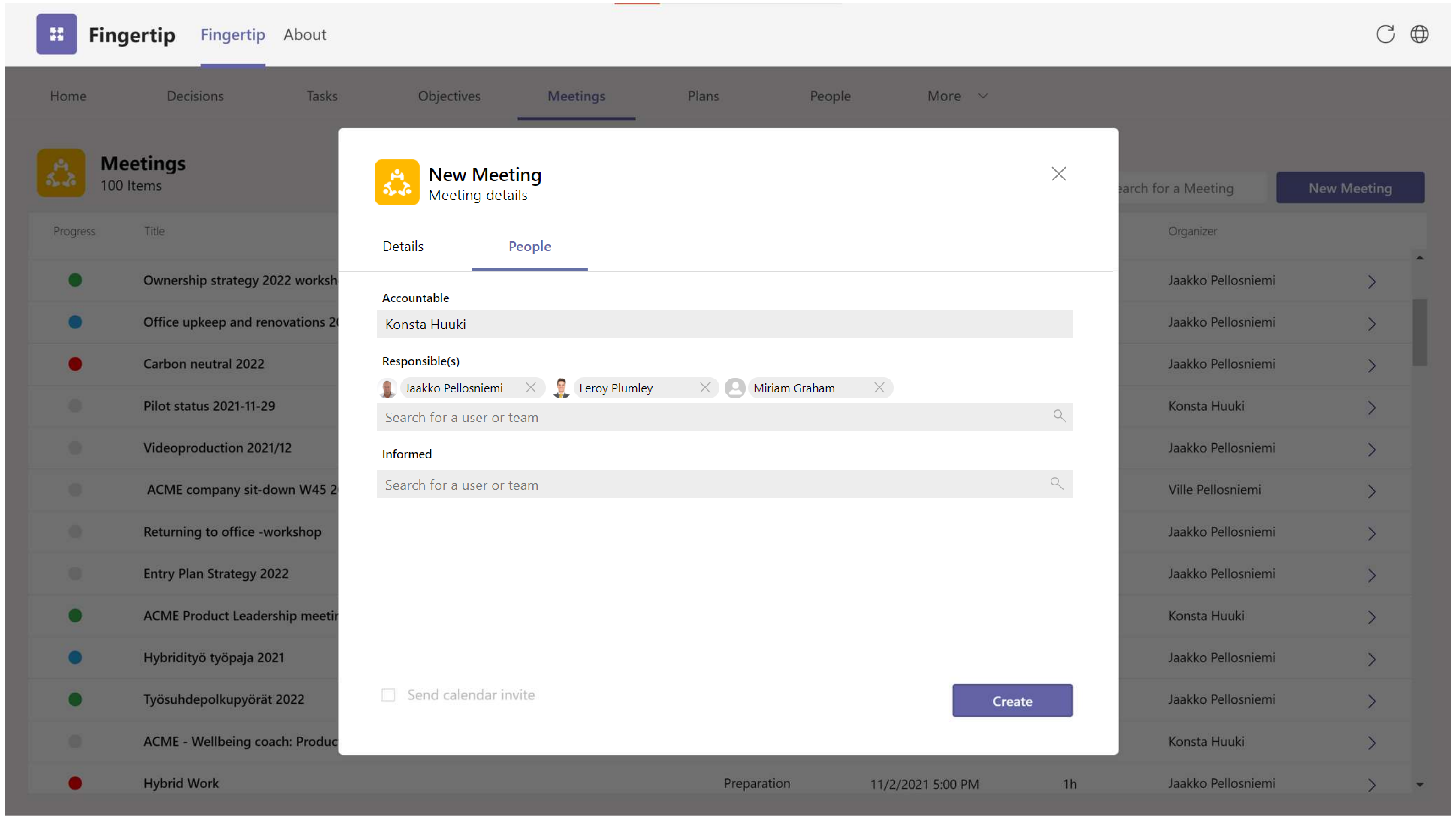
FINGERTIP

Create a meeting to engage with people and to set the agenda



1. Create a new meeting from the home page or the Meetings tab by clicking on New Meeting
2. Enter the required details: Subject, description, start and end time
3. Choose, whether you want to create and send a calendar invite when creating the meeting (you can also do this later)
4. Click on the People tab to invite people to the meeting (you can also do this later)

Create a meeting to engage with people and to set the agenda

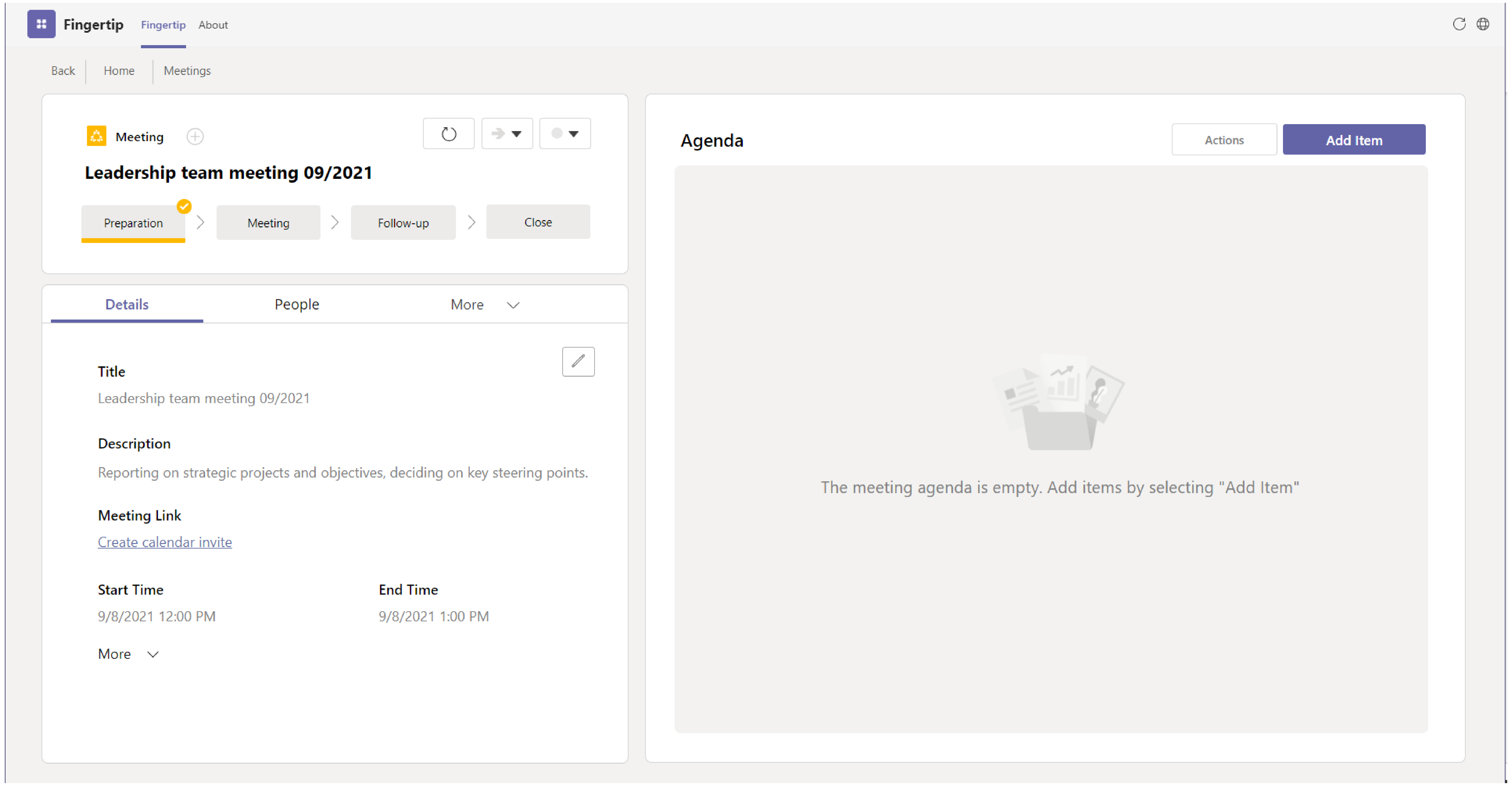


5. Select the people you wish to join you in the meeting and agenda creation

6. Click Create to share the meeting with the participants and start collaborating in agenda creation

FINGERTIP

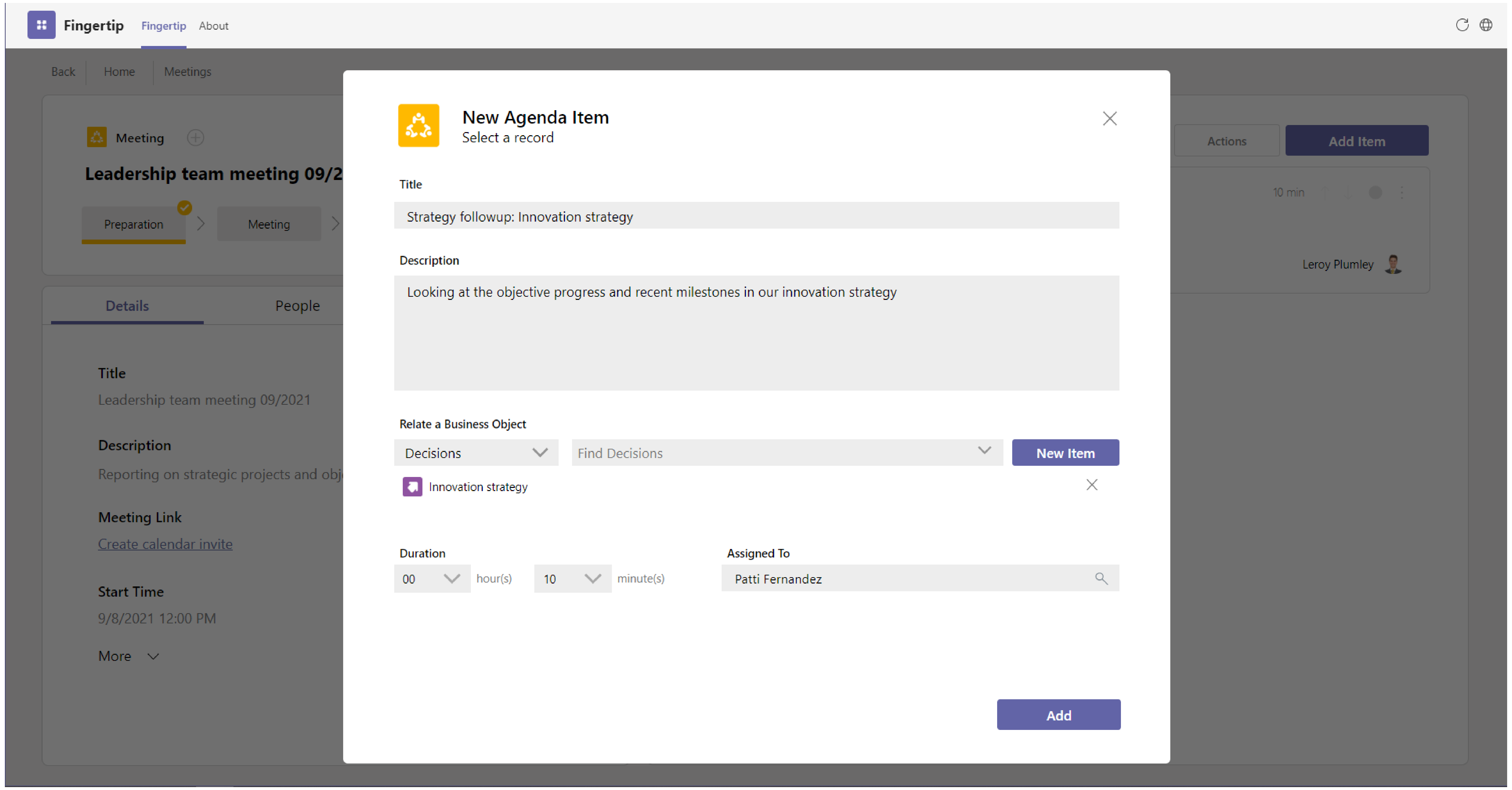
Create agenda items and relate business objects



5. You have now created and shared a meeting. Everyone invited is able to see and add items to the meeting agenda.
6. You can also edit the details and send an invite to the participants from the details tab on the left

FINGERTIP

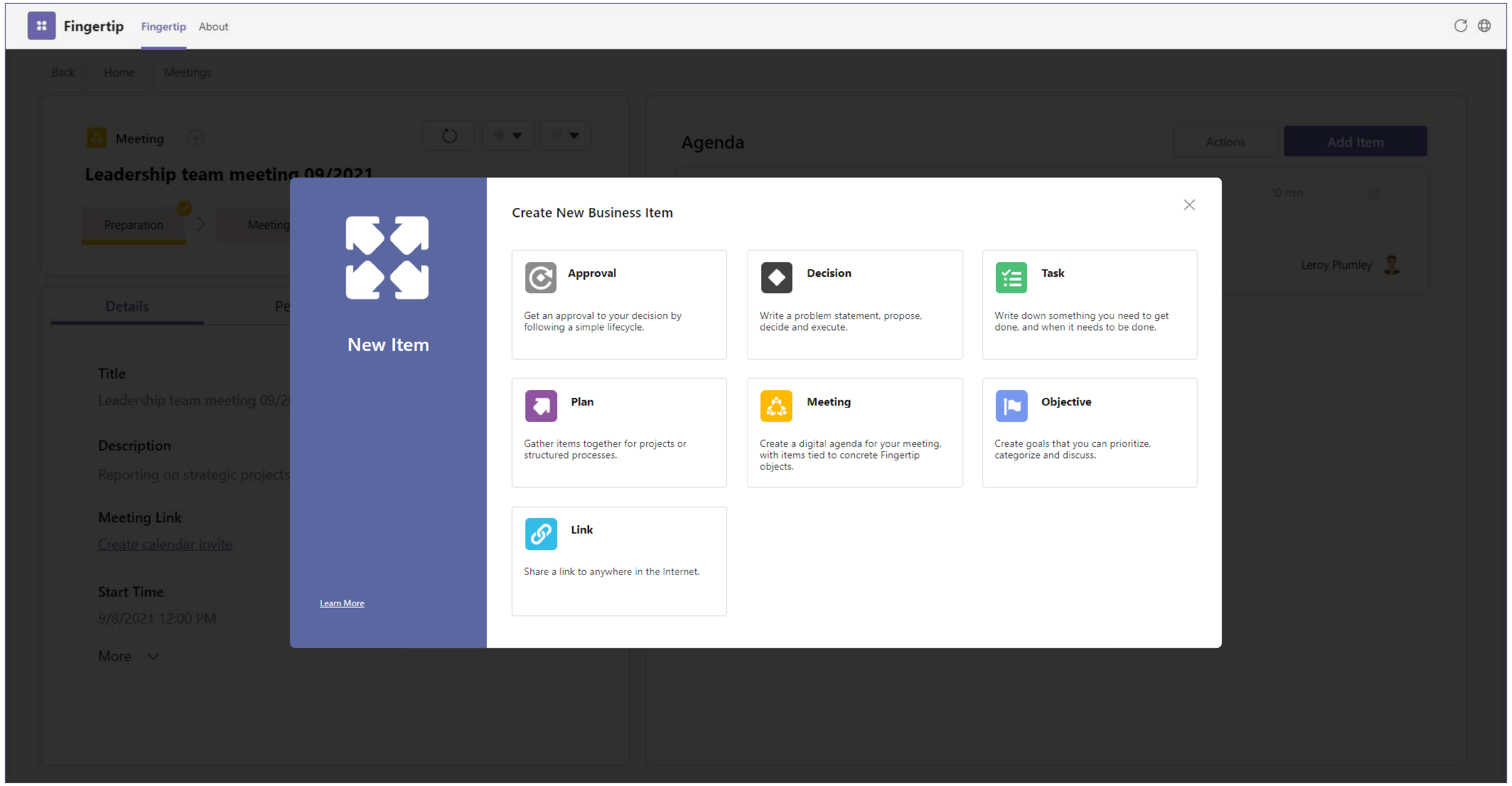
Create agenda items and relate business objects



7. Create new agenda items using the *Add item* button
8. Enter a title, description, relate business objects (tasks, decisions, plans, meetings, objectives or links), set up the expected duration and assignee for the agenda item

FINGERTIP

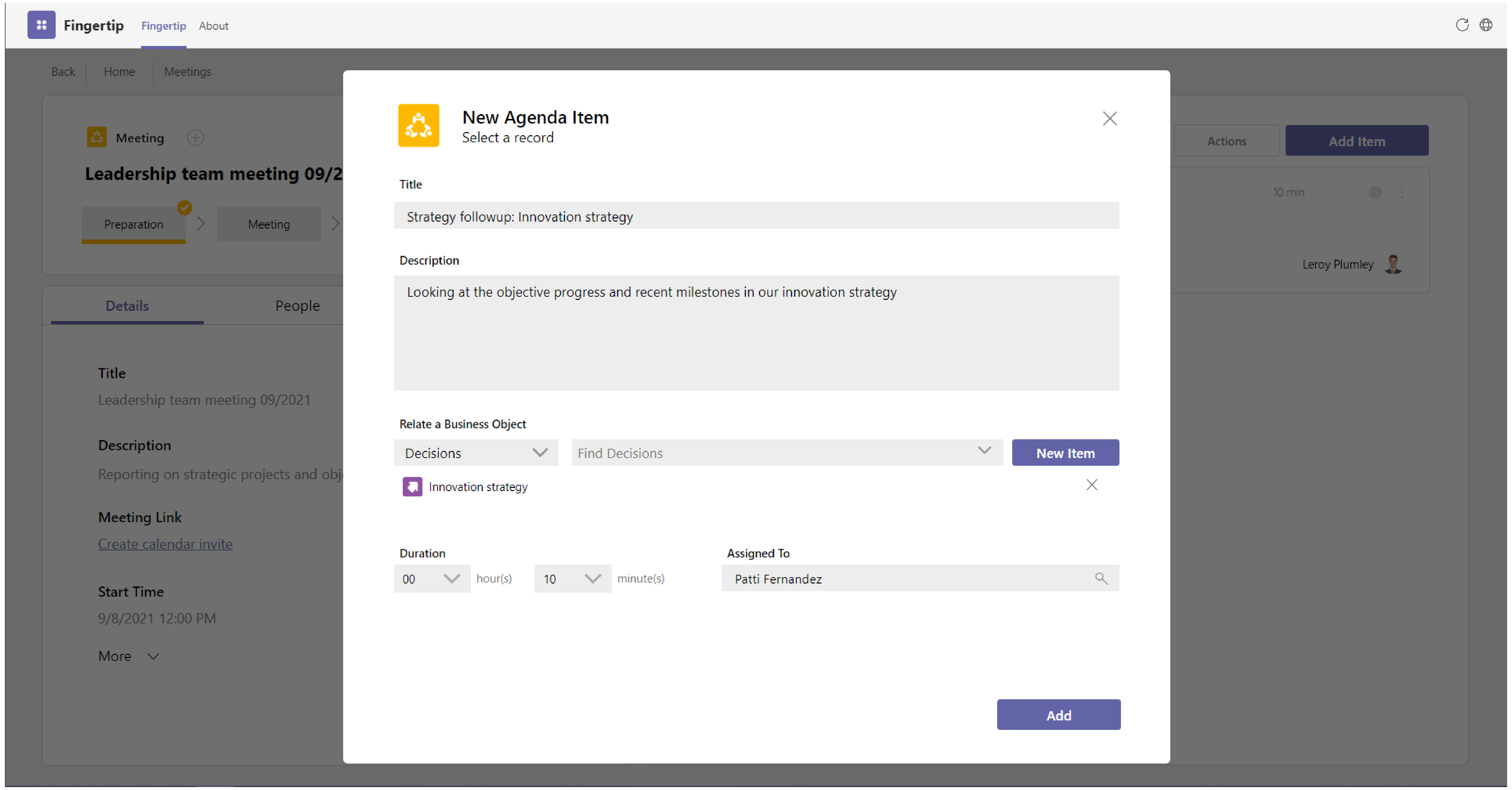
Create agenda items and relate business objects



9. You can also create new business objects within the *New Agenda Item* menu using the *New Item* button
10. Select the item type and fill the relevant details from the popup menu.

FINGERTIP

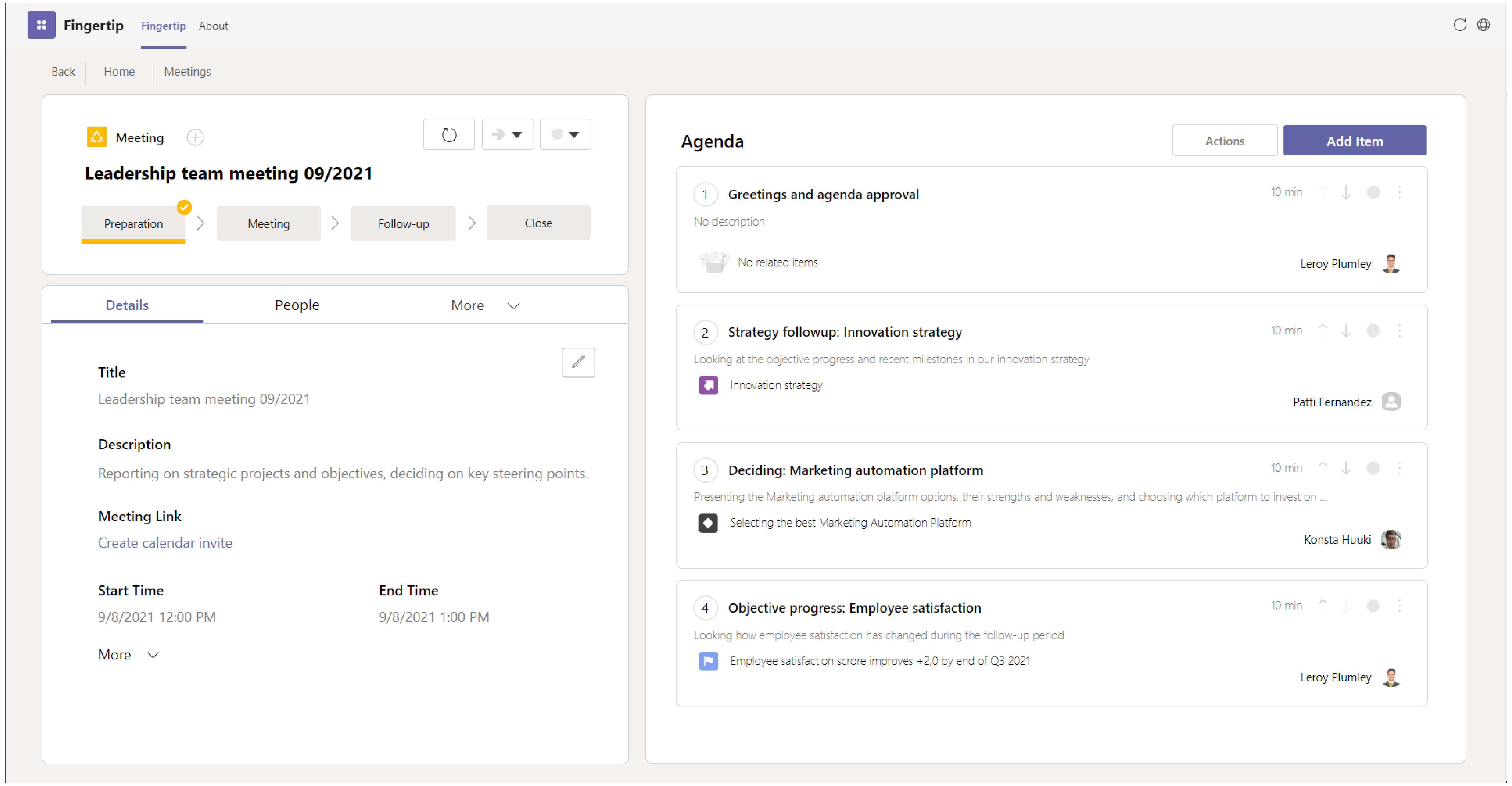
Create agenda items and relate business objects



11.Click *Add* to include the item to your agenda.

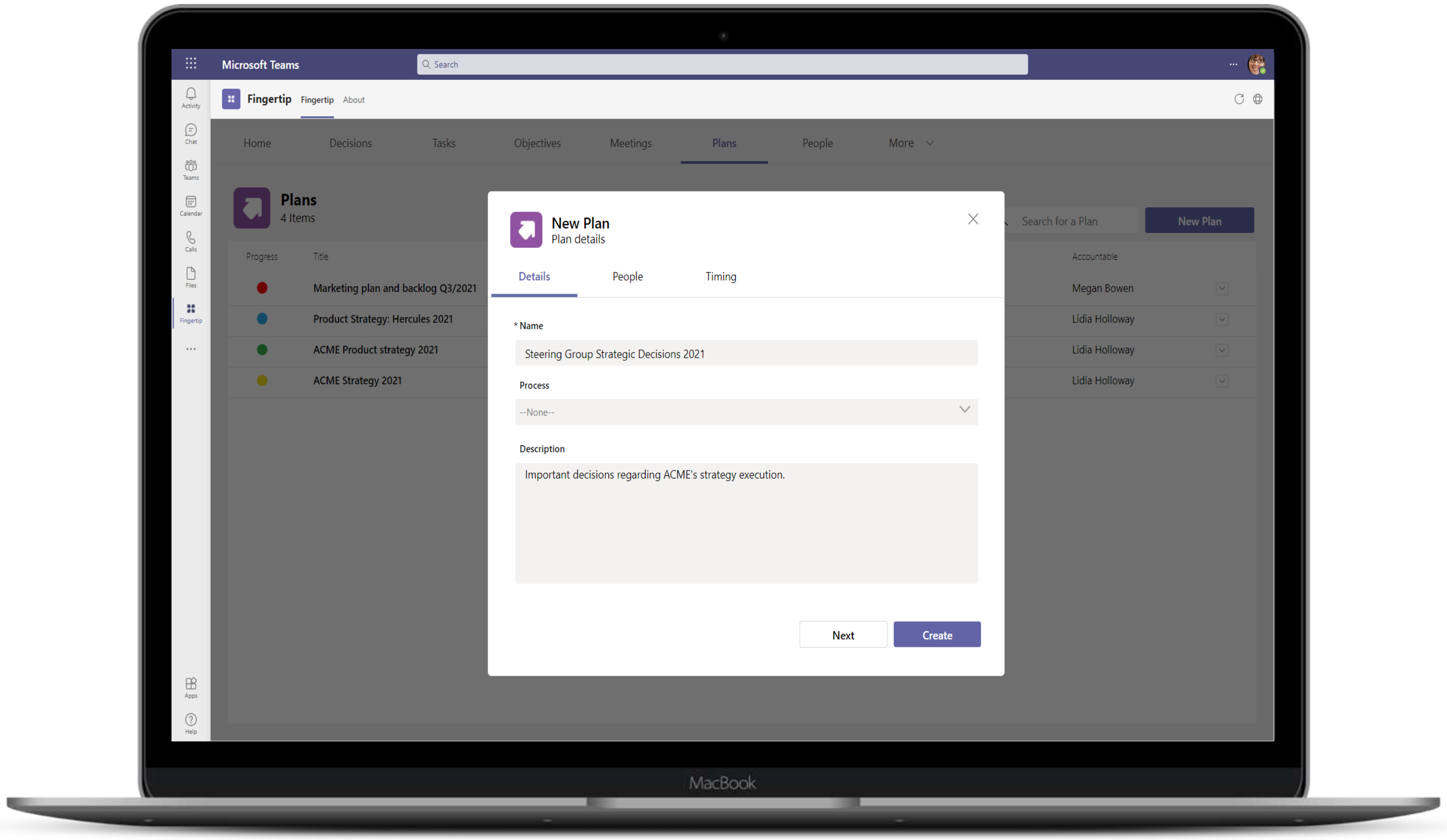
FINGERTIP

Build the agenda for the meeting and sent the calendar invite



12. All participants can collaborate in adding and editing the agenda items to collaborate also before and after the meeting
13. Use the life cycle and status indicators on the top left to communicate current meeting stage and progress even faster.

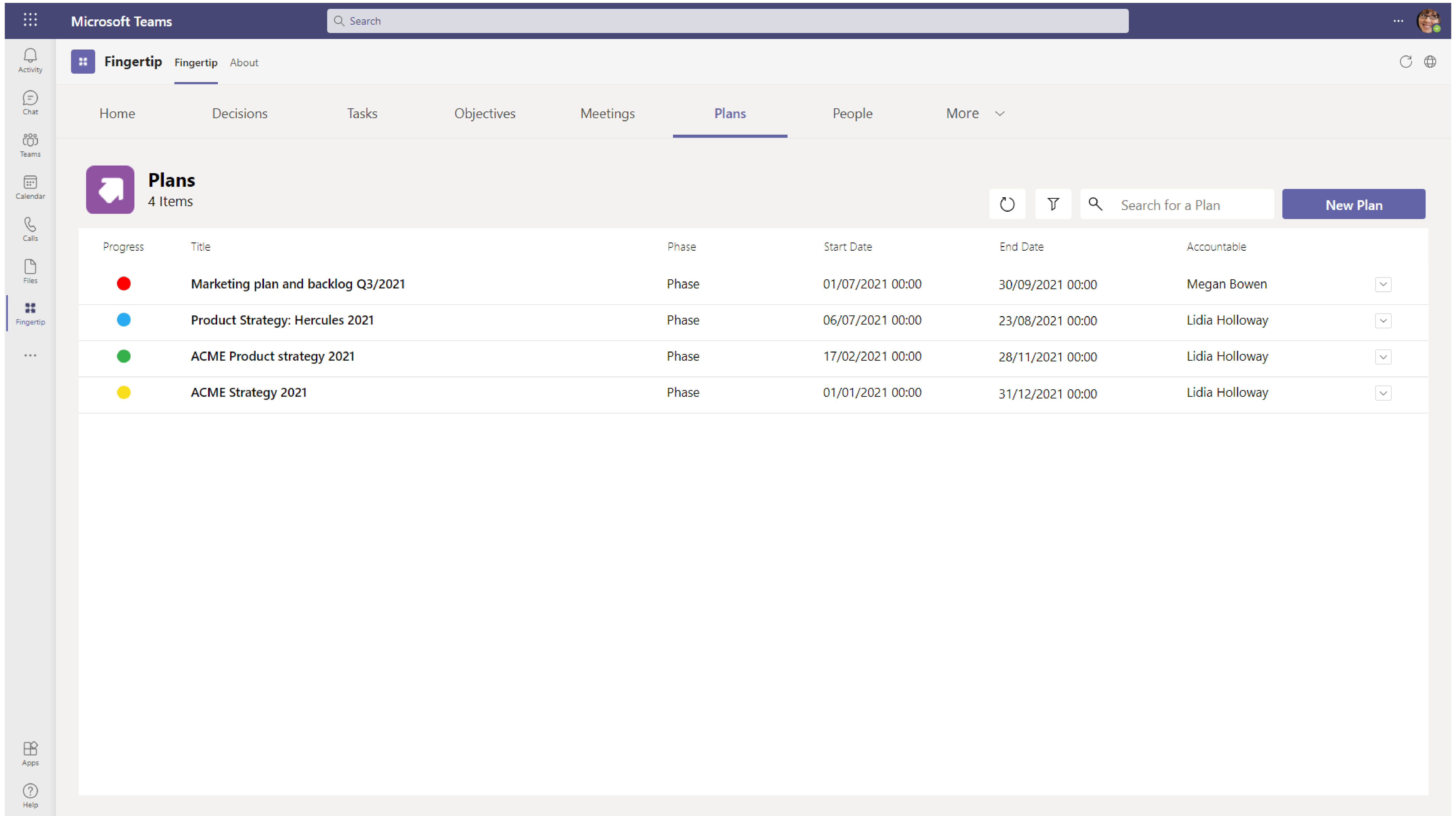
FINGERTIP



How to create a new plan

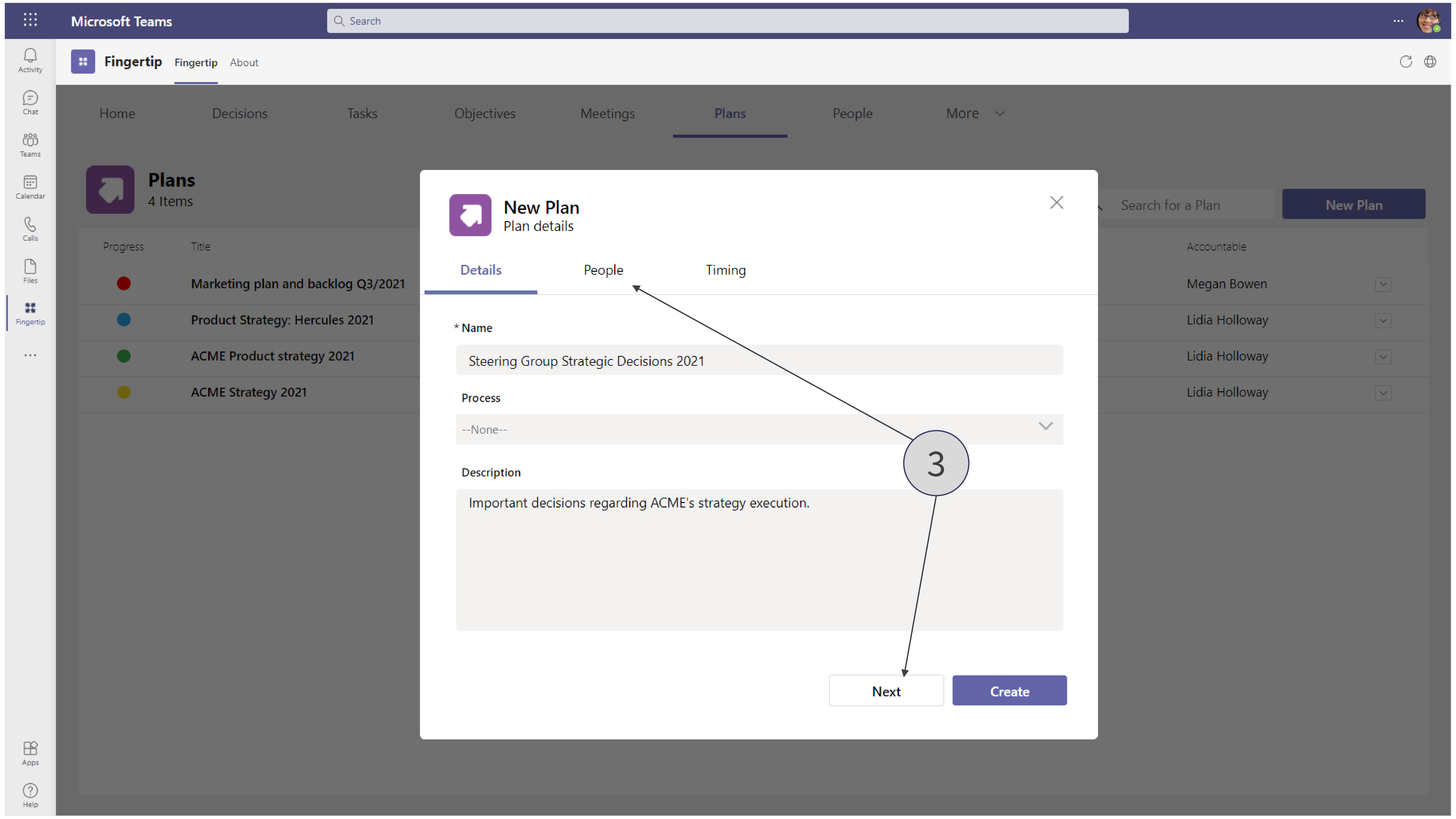
FINGERTIP

How to create a new plan



1. Start by clicking ”New Plan”, for example on the Plans tab

How to create a new plan

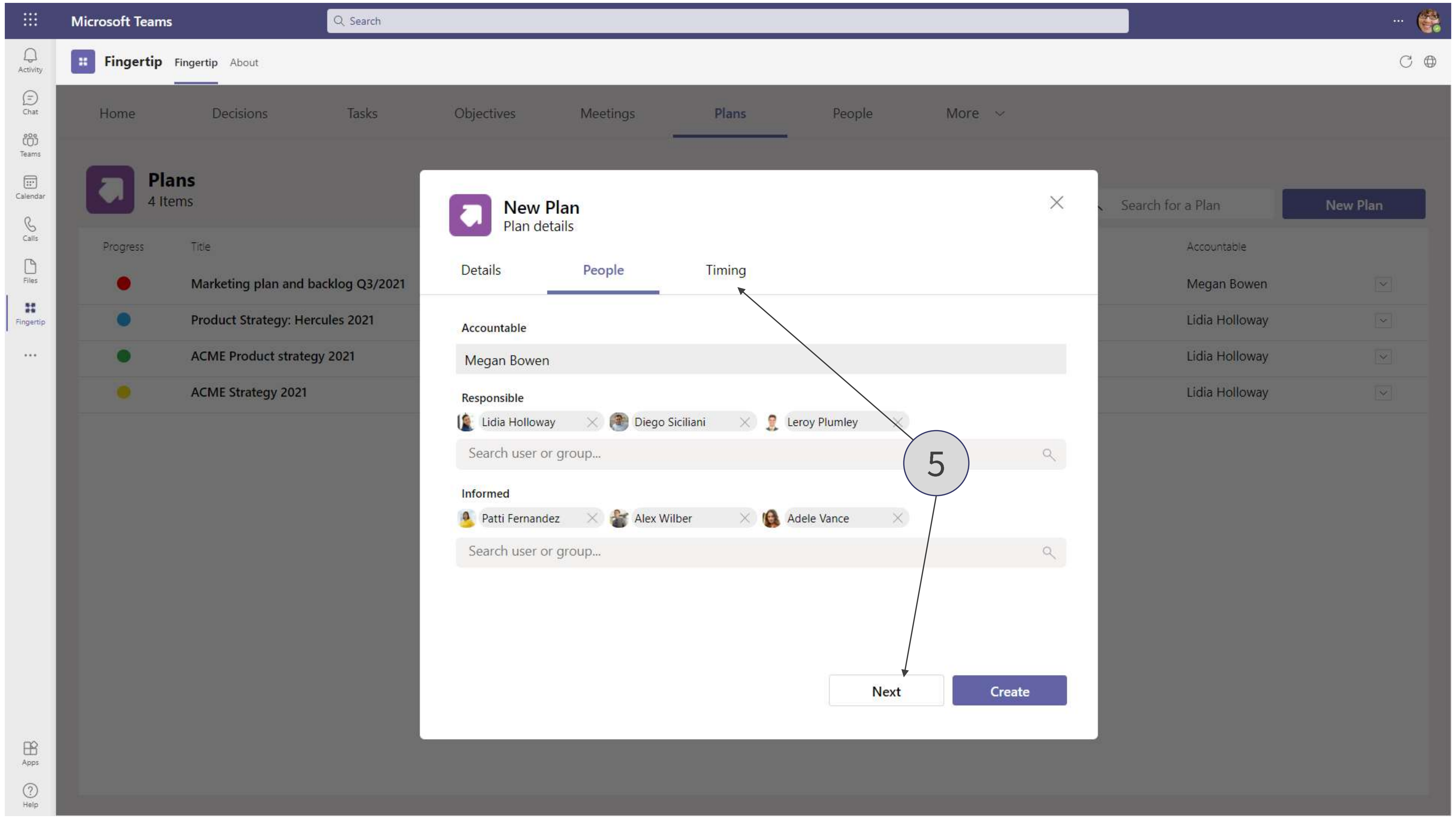


2. Enter the Name and Description of the Plan. Be unique and specific!
3. Click Next or head to the People tab to invite collaborators.

Note: Current version only supports a default 3-phase process, but more and customizable processes are on the way!

FINGERTIP

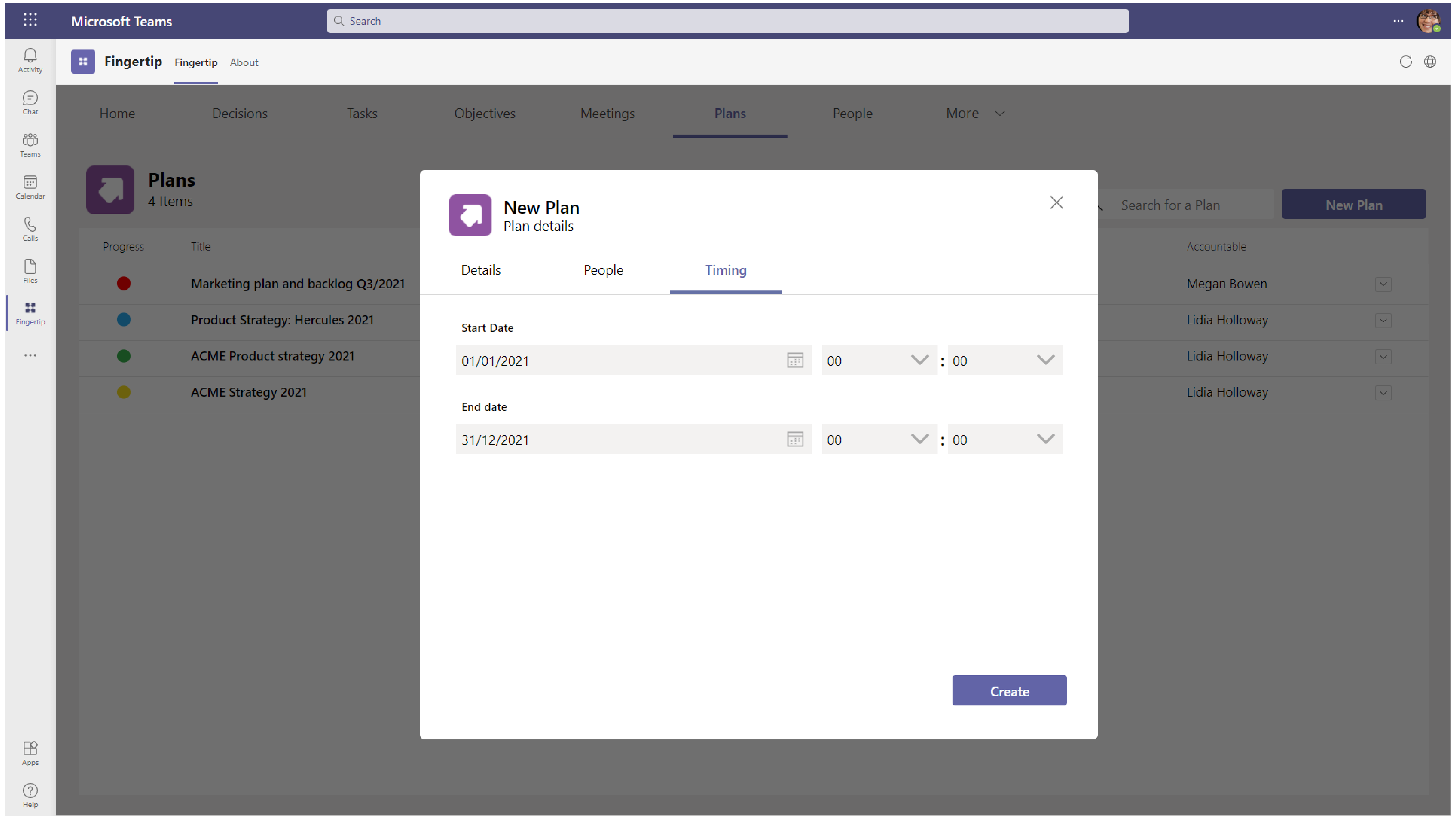
How to create a new plan



4. By default, you are the accountable for Plans you create. Invite here the people you need to share and collaborate in the plan with
   - Responsibles (able to edit)
   - Informeds (able to view)
5. Click Next or Timing –tab to continue

FINGERTIP

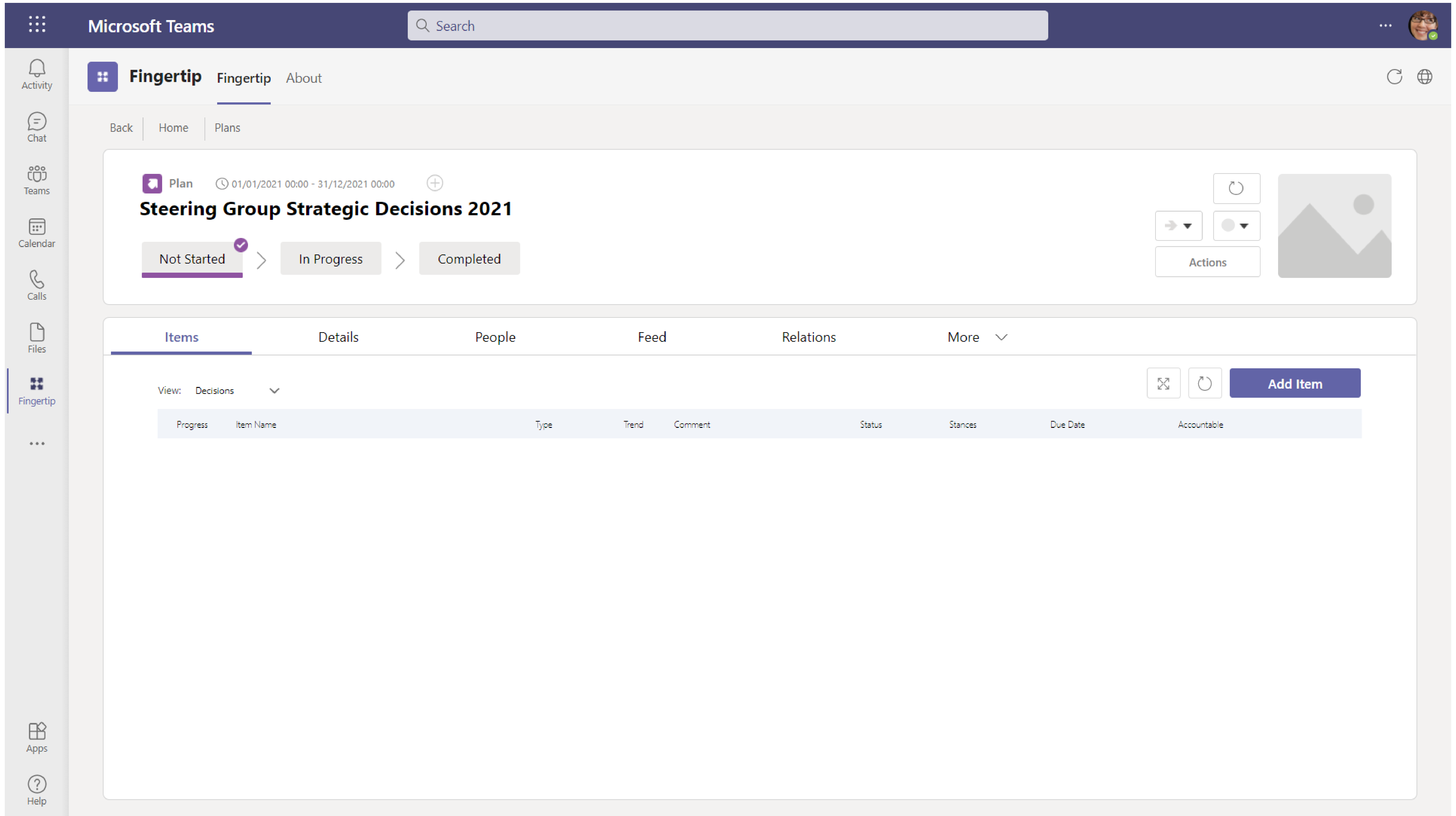
How to create a new plan



6. Set the start and end dates for when you expect the Plan/Project/Portfolio to be active.
7. Click Create to share the Plan with the invited people

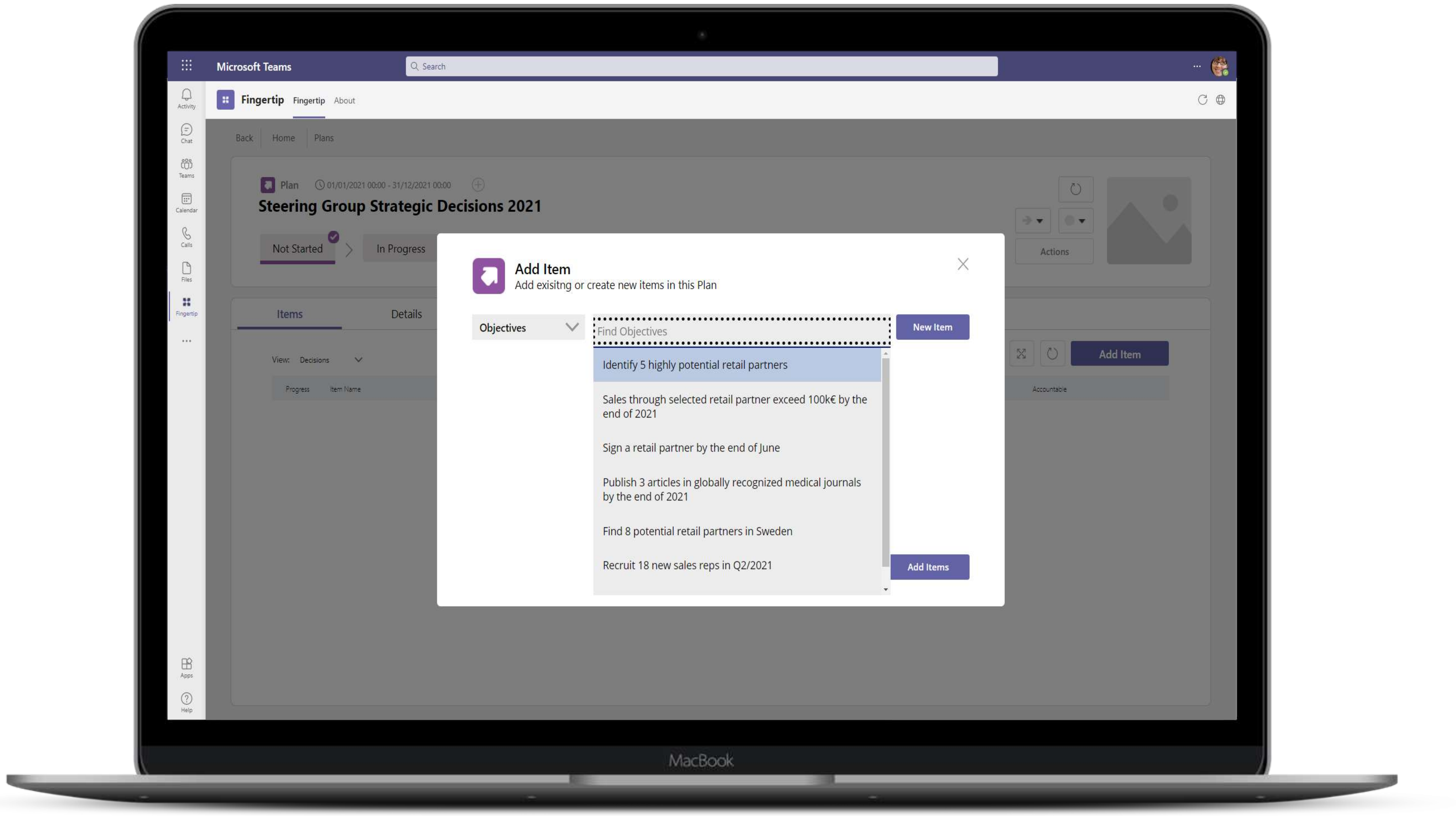
FINGERTIP

How to create a new plan



8. Done! You can all now start adding content, tasks, goals, send messages and more within the plan.

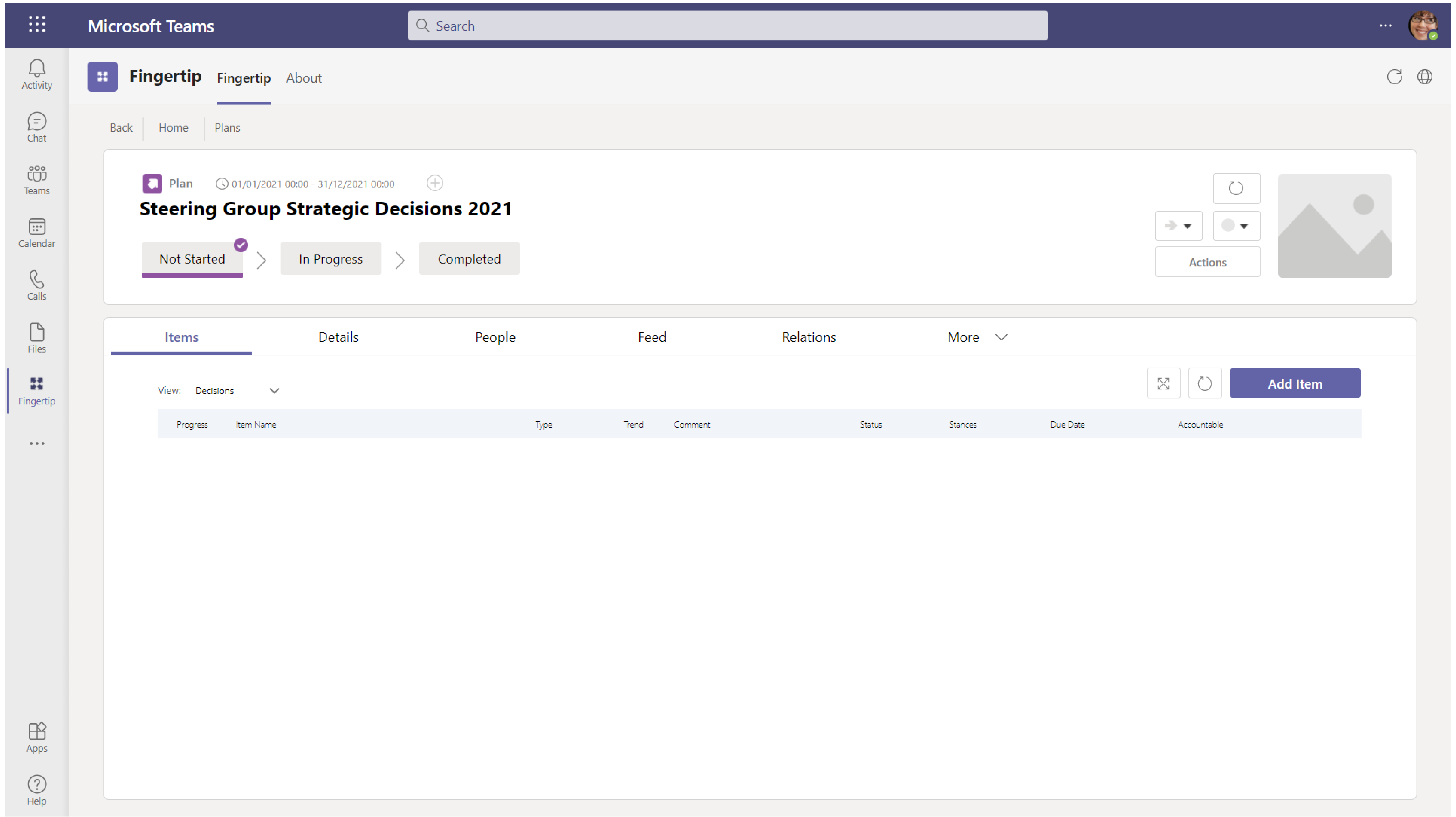
FINGERTIP



How to add existing items to a plan

FINGERTIP

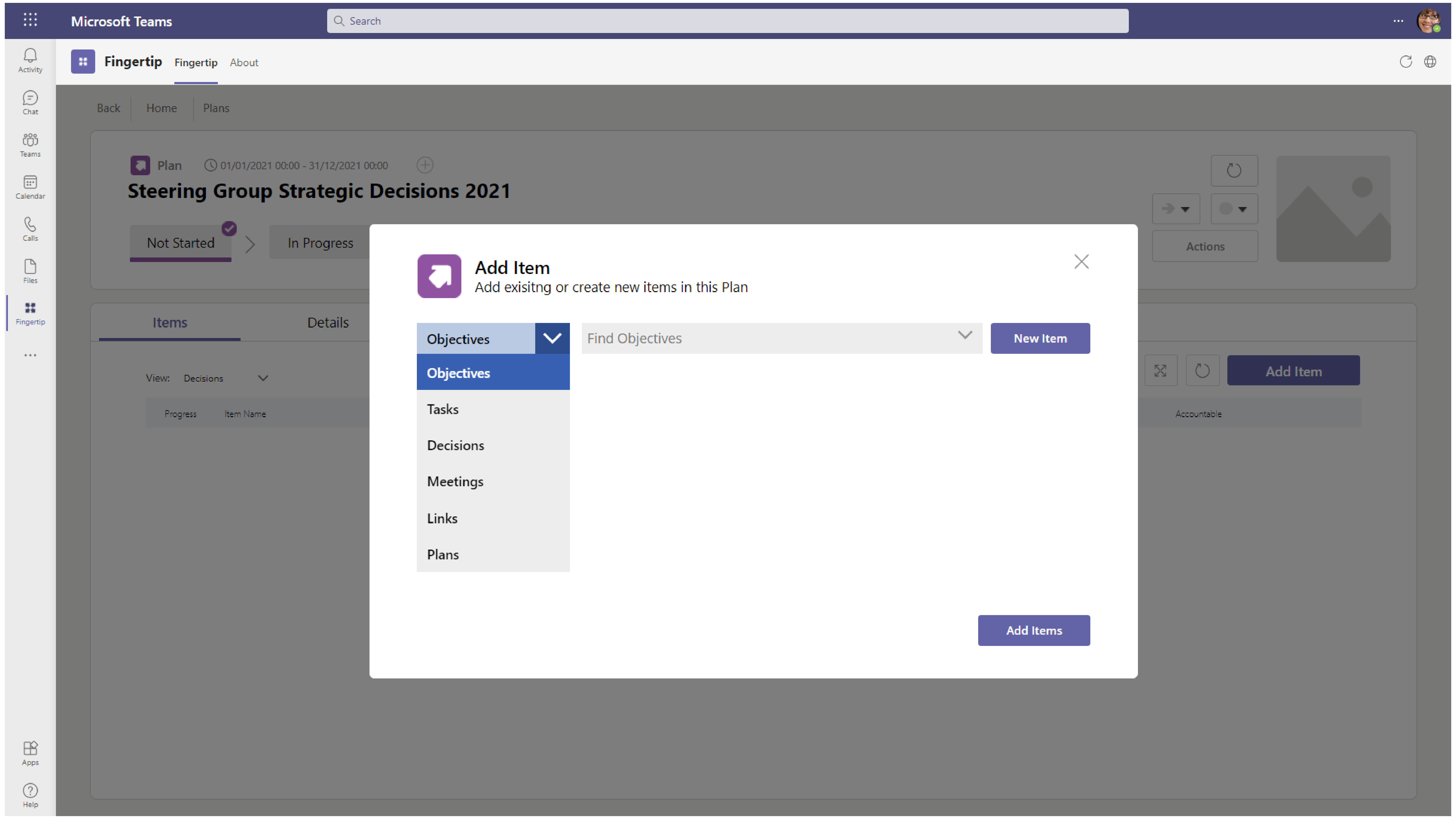
How to add existing items to a plan



1. To add items to the Plan, start by clicking the Add Item button to the top right of the items list

FINGERTIP

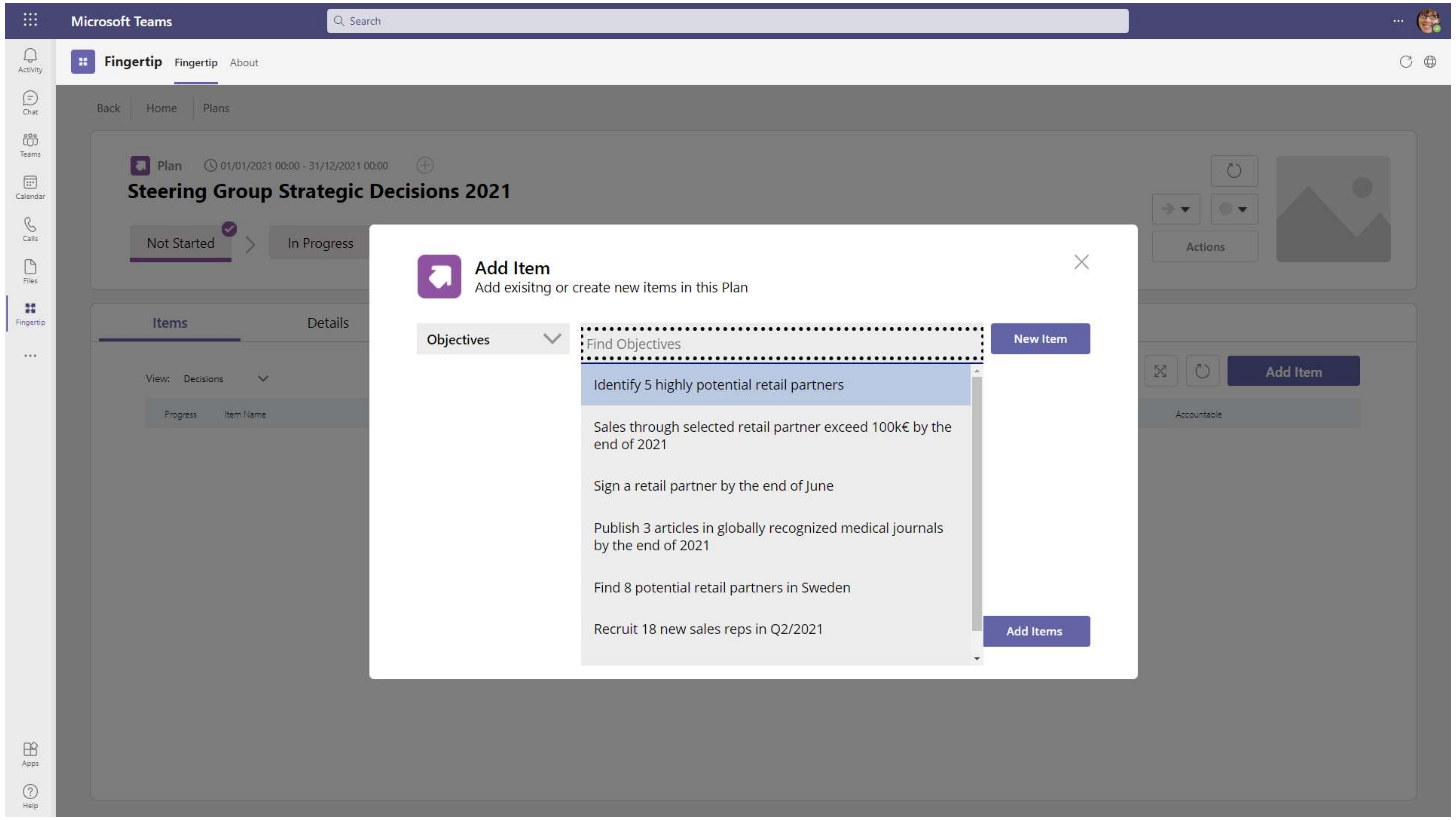
How to add existing items to a plan



2. When adding existing items you need to first select the item type from the left-most dropdown menu

FINGERTIP

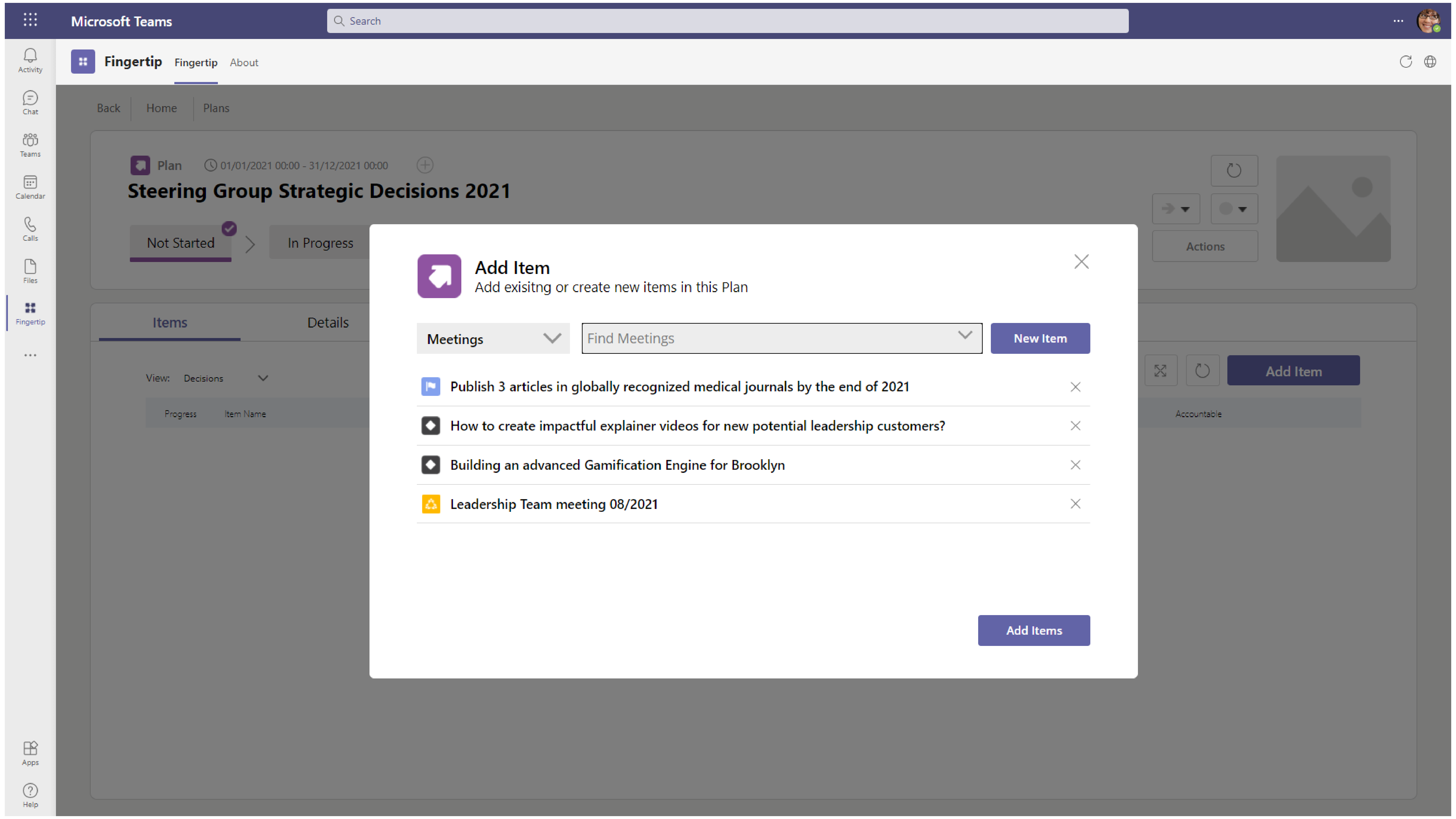
How to add existing items to a plan



3. The middle menu shows the most recent items of the selected type. You will only see items shared to you. You can also type the name or a keyword from the item you want to find it.

FINGERTIP

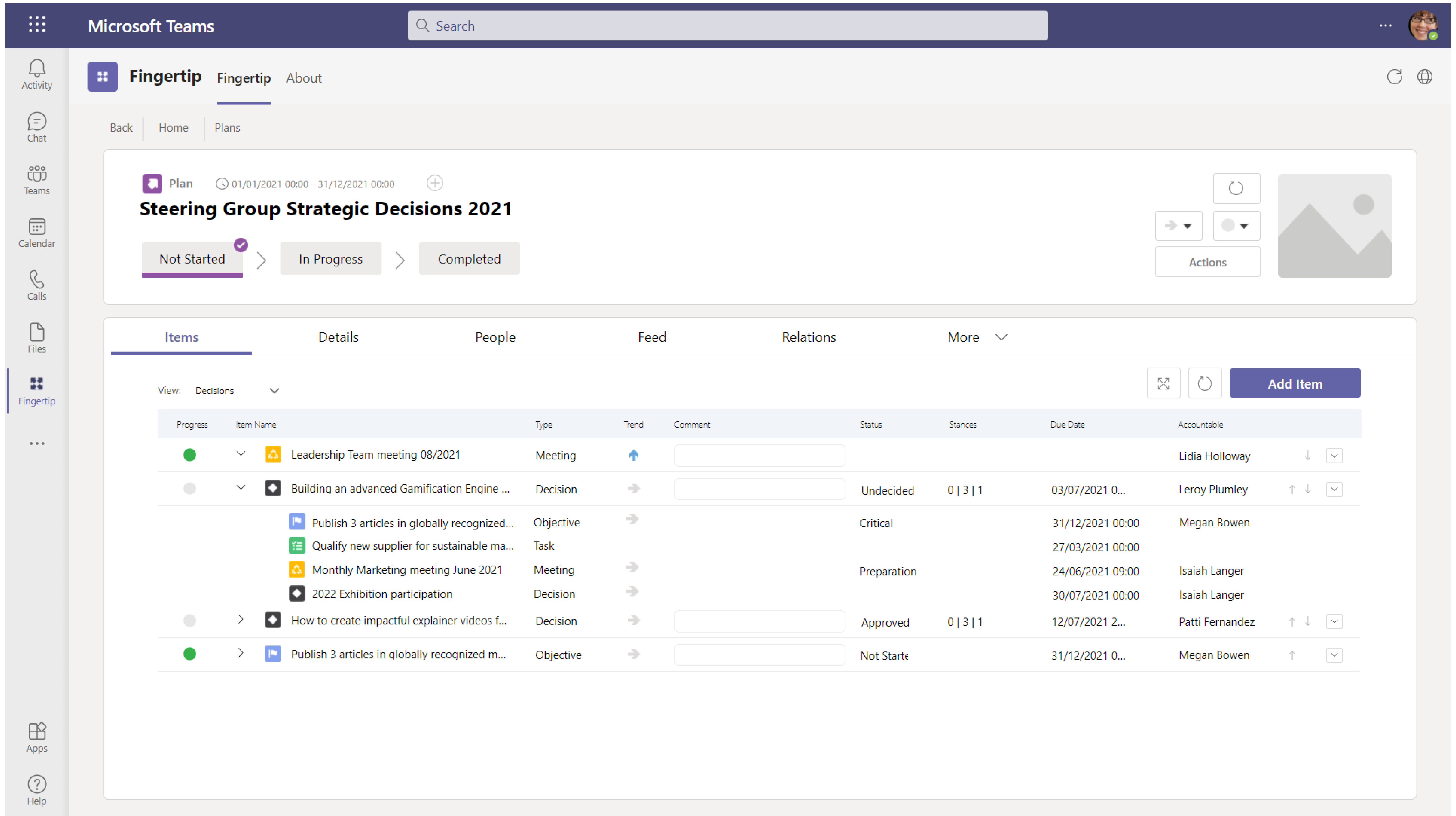
How to add existing items to a plan



4. You can add multiple item types simultaneously to your plan. When you’re happy with your selection, click ”Add Items”

FINGERTIP

How to add existing items to a plan

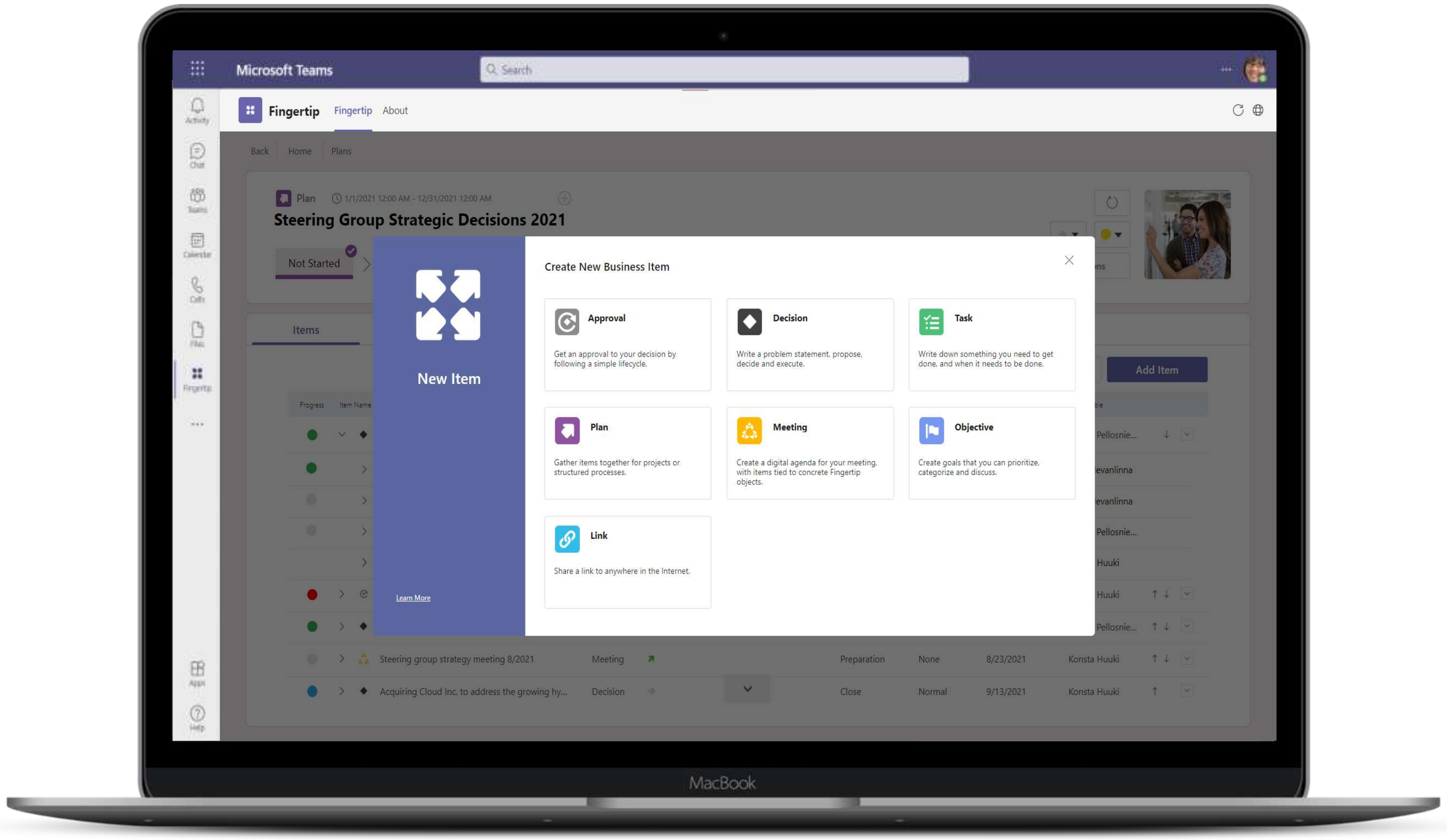


5. Done! Your items are added to the items list.

Tip: You can also expand single items from the arrow on the left to see related items to that item!

Tip: Change the order of your items from the right hand side.

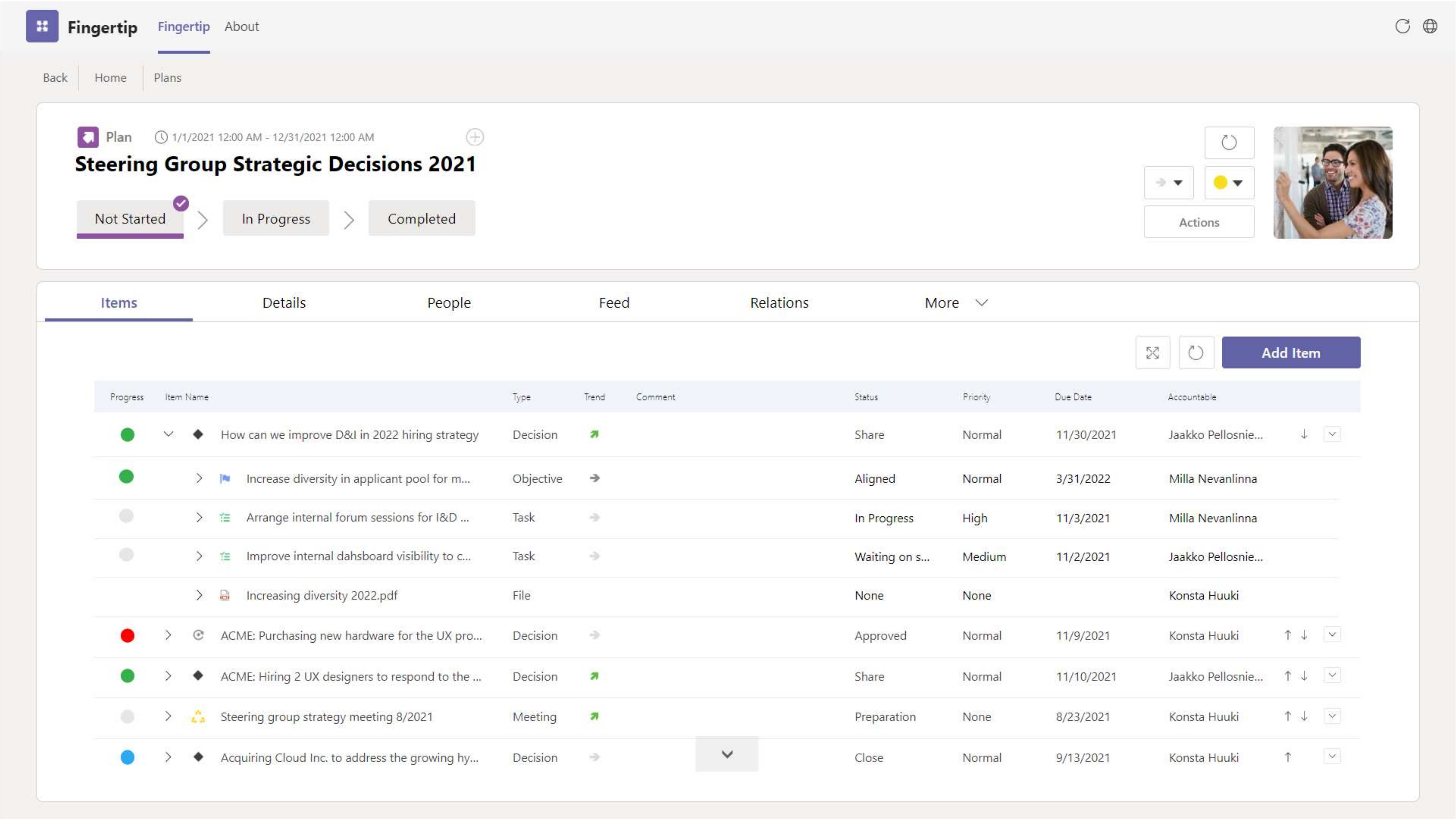
FINGERTIP



How to create new items to a plan

FINGERTIP

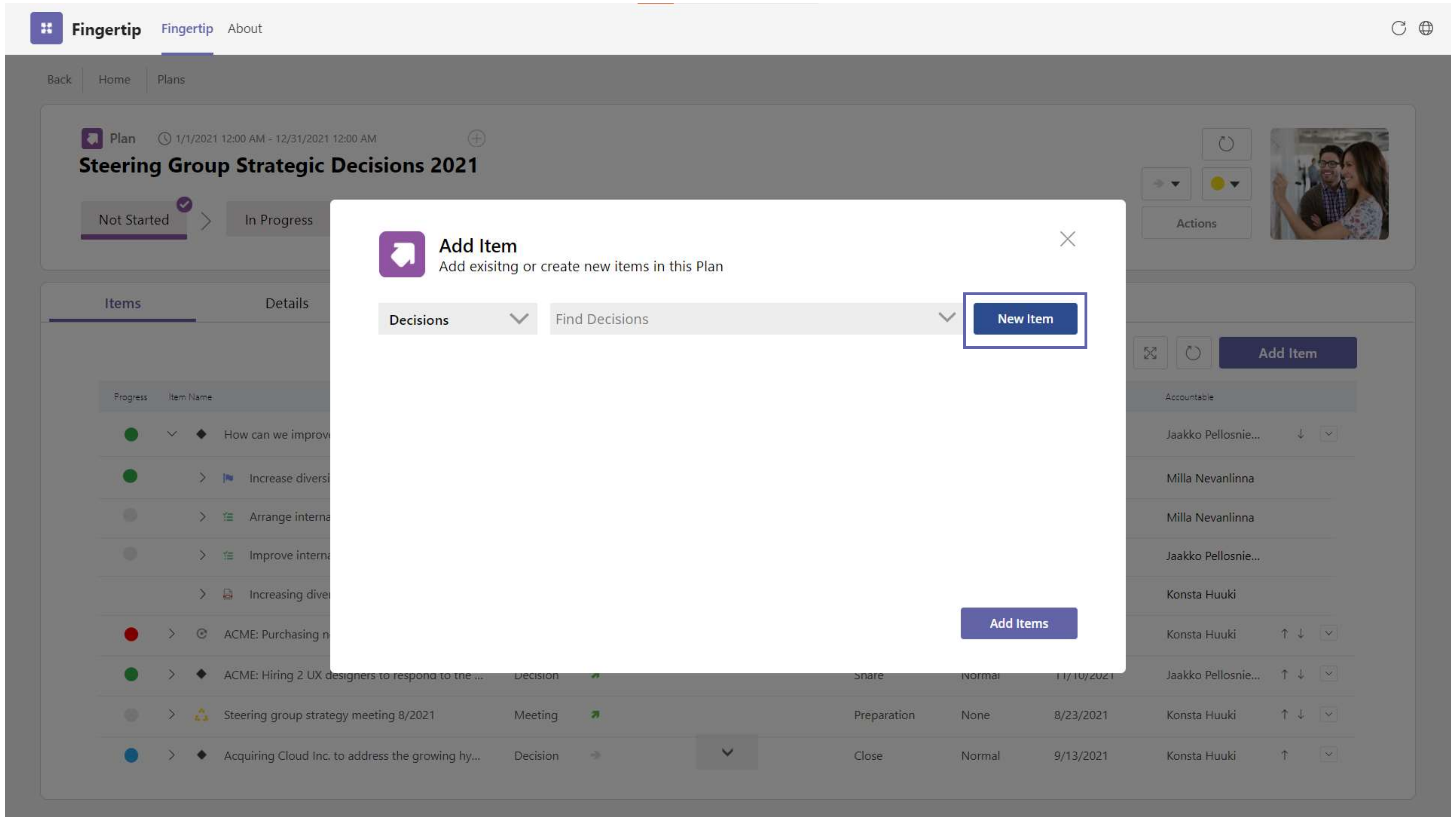
How to create new items to a plan



1. New items are created from the same menu from where you add existing ones: Click Add Item.

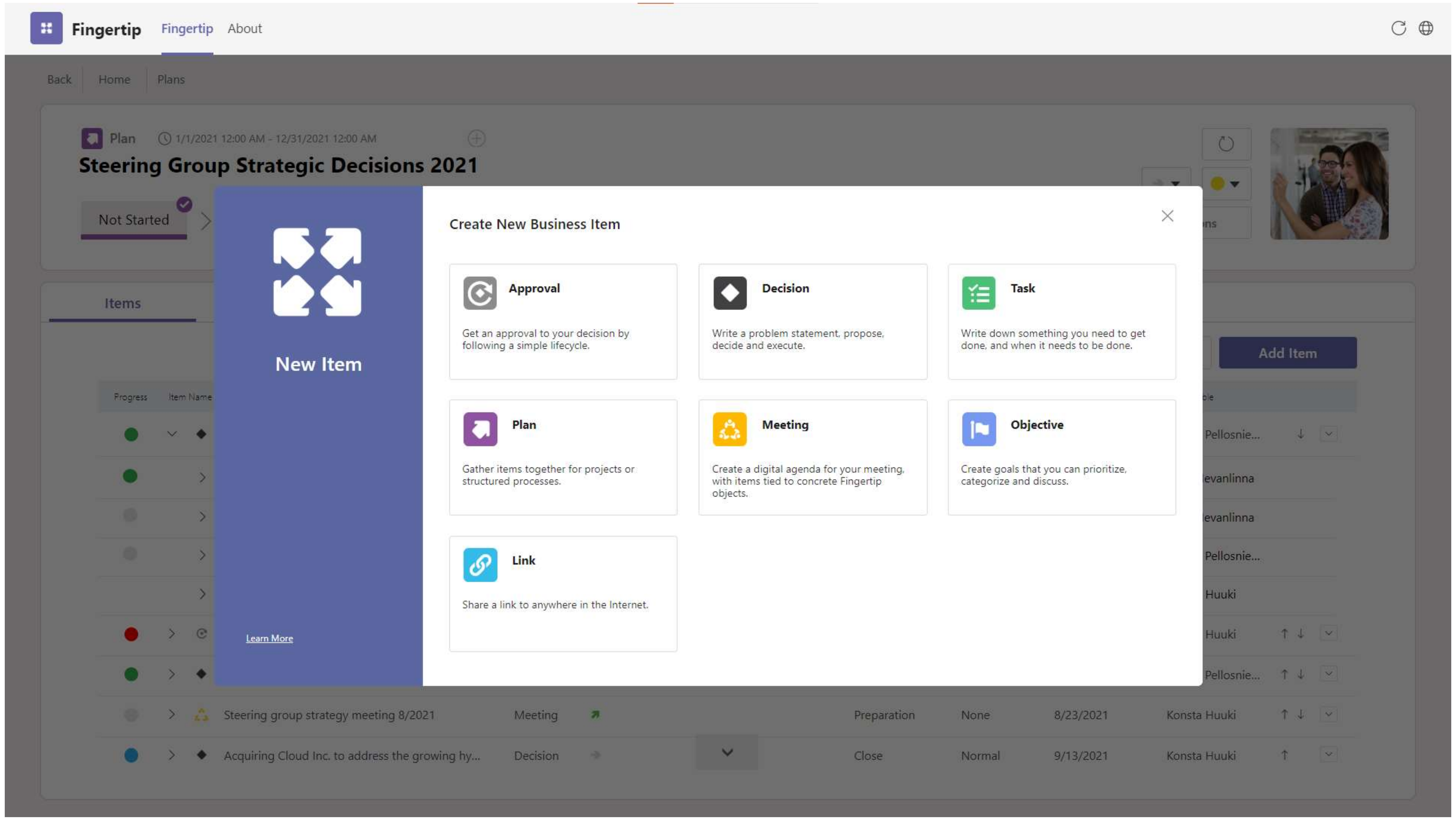
FINGERTIP

How to create new items to a plan



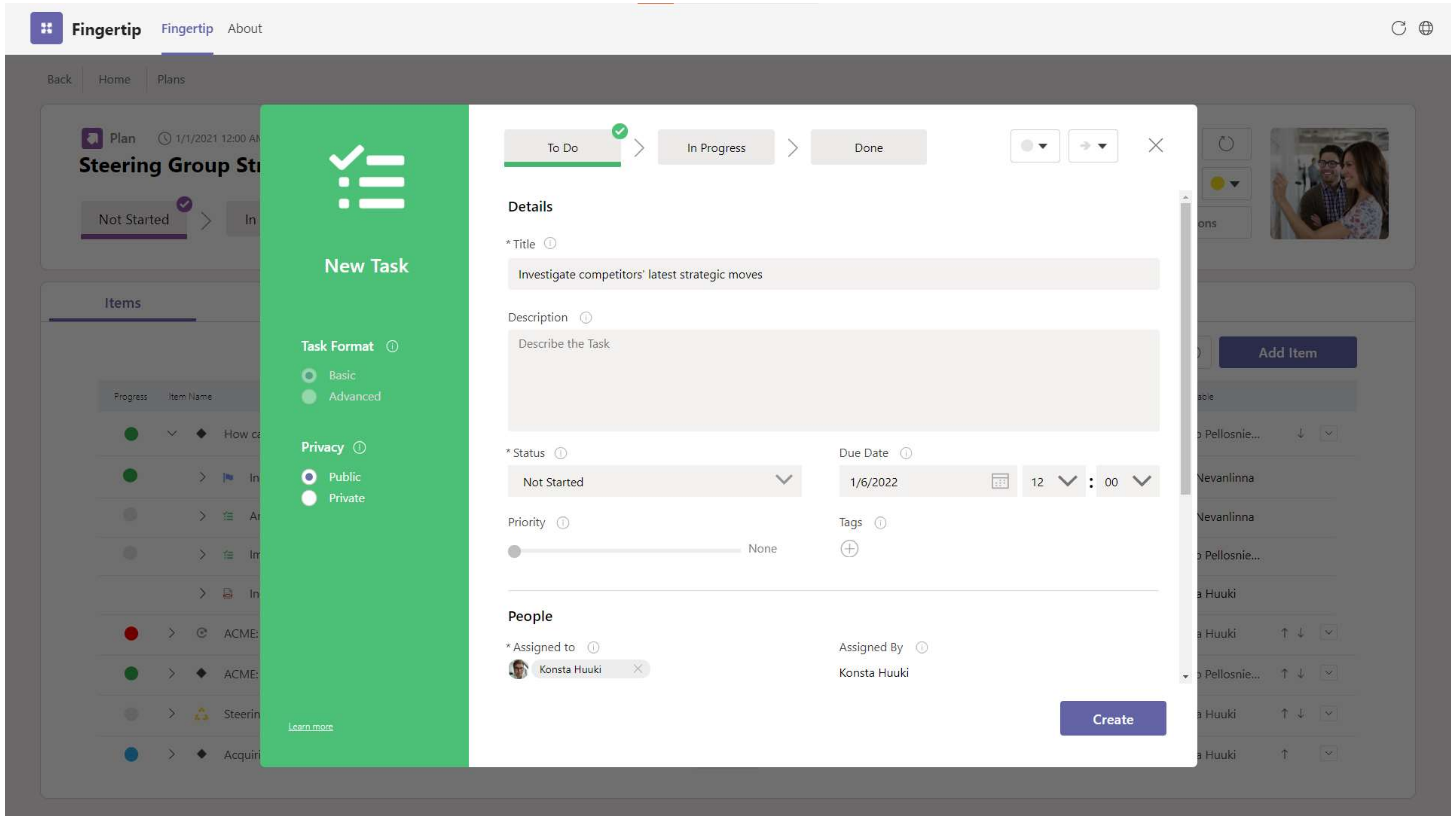
2. Instead of touching the search attributes, click the New Item button on the right

How to create new items to a plan



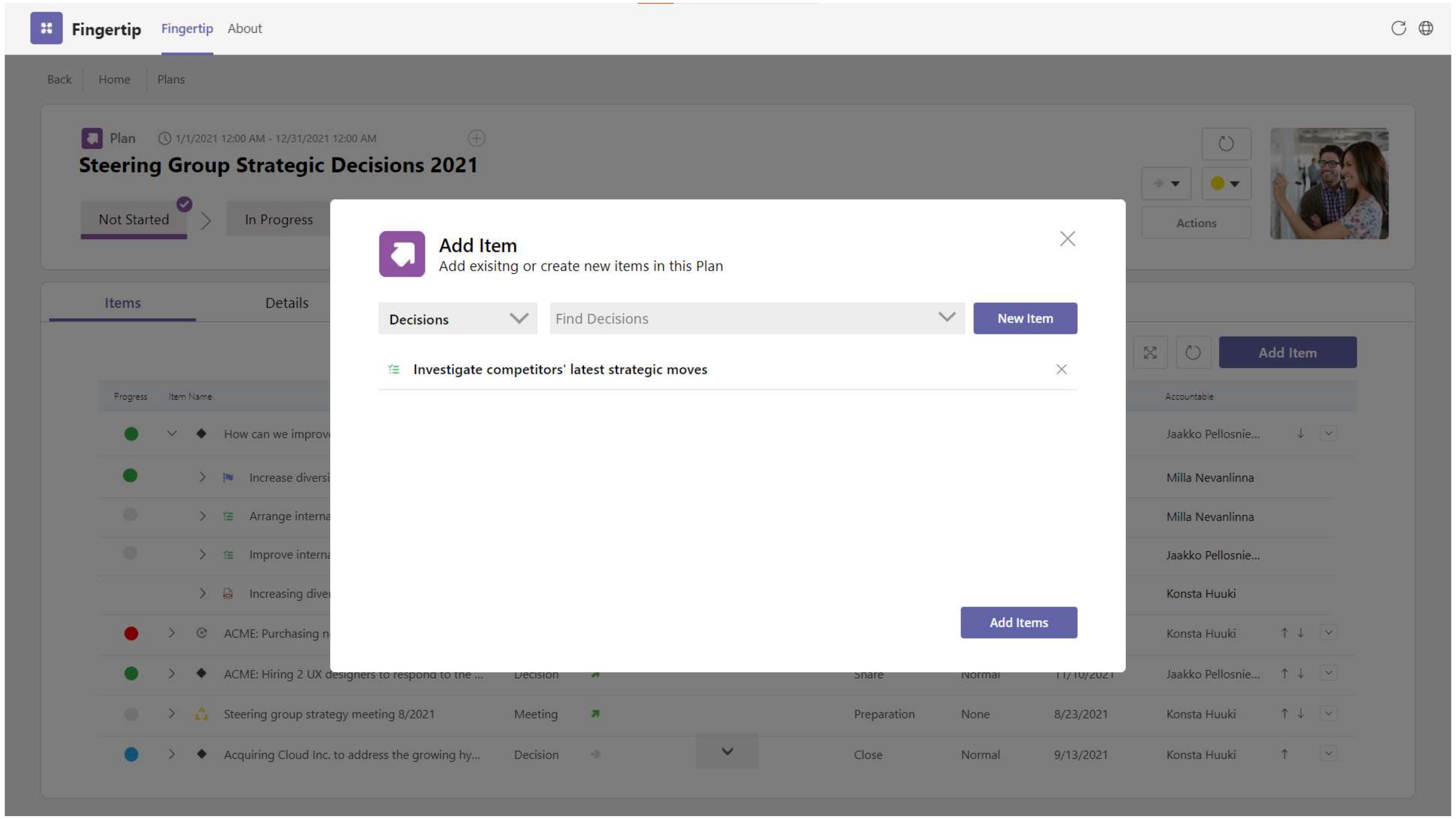
3. Select the item type. In this example, we will go with Task.

How to create new items to a plan



4. Add the relevant details as explained in the other step-by-step guides, and click Create.

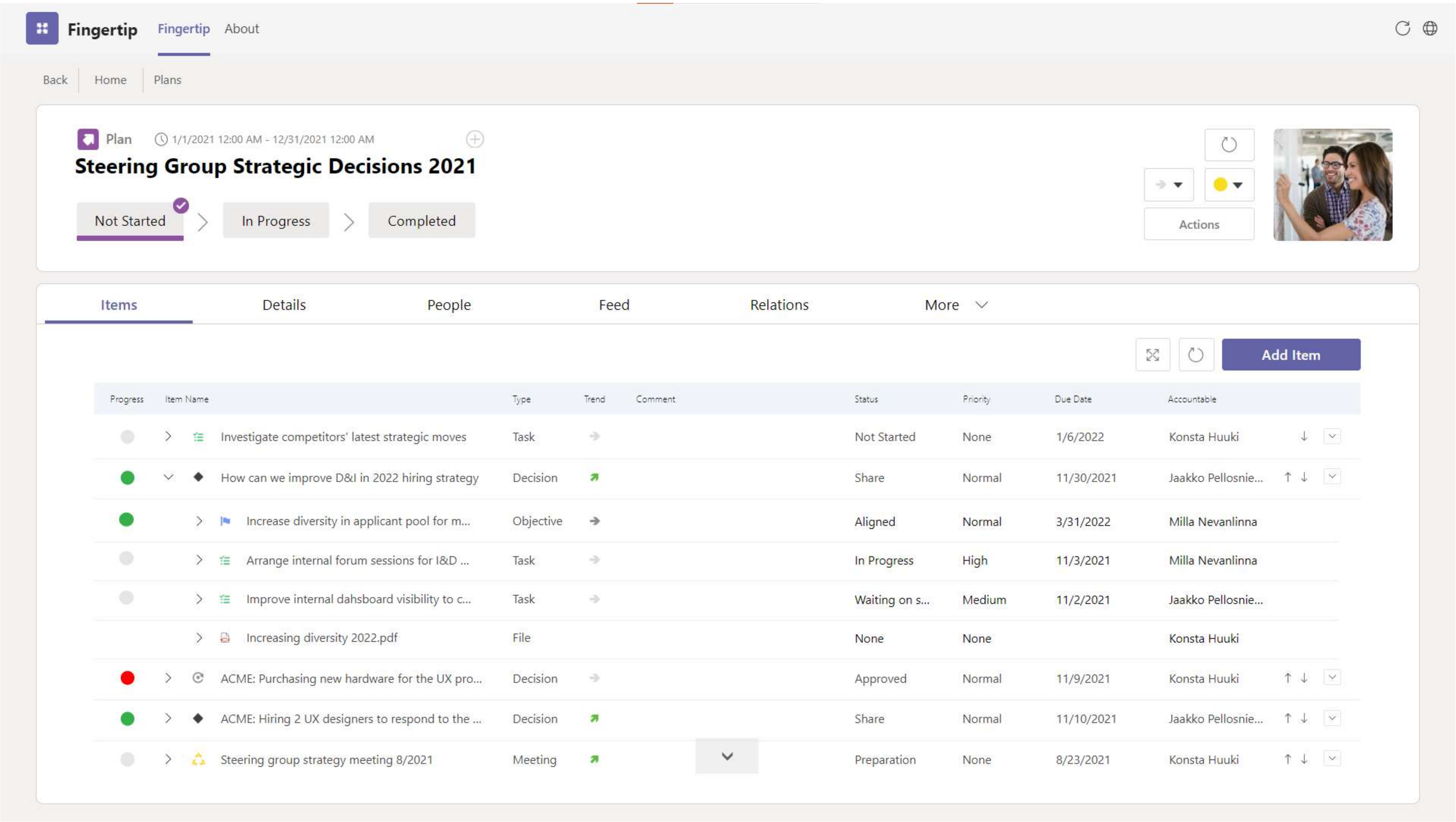
How to create new items to a plan



5. The item has been created, and will be added to the Plan, once you press the Add Items button.

FINGERTIP

How to create new items to a plan



6. Done! The newly created item has been added to your plan.

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Jaakko Pellosniemi
Founder

Fingertip Oy
jaakko@fingertip.fi
+358 40 5011004
www.fingertip.org

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