

# Ideation (Ideas)

i·de·a·tion

/ˌɪdēˈɑːʃən/

noun PSYCHOLOGY

1. the formation of ideas or concepts.  
"paranoid ideation"

For CA Technologies, ideation – also known as crowdsourcing - provides us with a mechanism to gauge which product ideas are most important and relevant to our customers and partners. Ideation allows community members to add product-specific ideas, promote them, demote them and comment on them. As ideas are promoted, their score increases, allowing us to rank which suggestions and requests are considered most important.

## ***Who does what?***

Customer and Partners both have the ability to submit ideas, which could be enhancements to existing products or entirely new features.

Product Management determines the guidelines that are communicated for their product area to ensure expectations are properly set with the customers. Product Management is also responsible for reviewing the ideas and determining which will be added into the product.

## ***Guidelines:***

- Product Management decides whether or not they want their Ideas pages to be accessible to guests or to members only. This is controlled by the site template.
- A user must be a member of the community to add an idea, vote on an idea, or comment on an idea.
- A user can opt to Post Anonymously so their screen name does not display. To do this, the user who must be logged in and must be a member select the option = Post Anonymously while submitting a post.
- If necessary, a secondary Ideas Page can be added to a community.
- Only Idea Administrators and Portal Administrators can Edit or Delete an Idea.

## ***How to post an idea***

In order to post an idea, the following fields must be completed:

- Title (required) – How do you want to identify your idea? *E.g. New reporting template*
- Body (required) – What is the description of the idea? *E.g. It would be great to have a template available that makes reporting in product XYZ standard and out of the box.*
- Categorization/Product (required) - An idea MUST be assigned to a specific category or product; this can be done by expanding the Categorization section.
  - o Categories are custom for each Community. Categories are maintained in Control Panel. (see Filter by Category)
- Tags (optional) - add tags or keywords to the idea

- Related Assets (optional) - link an Idea to another asset in the community
- Optionally choose to “post anonymously” (user’s screen name will not display in the application) – this information is available to CA via Ideas reporting)
- A monthly report will be produced and posted at:  
<https://one.ca.com/support/communities/Reports/Forms/AllItems.aspx>

The screenshot shows the 'Post Idea' form in the CA Technologies Ideas community interface. The form is titled 'Idea 4' and includes a rich text editor with various formatting options. The user 'euser1euser12809423' with 70,600 pts is logged in. The form includes sections for 'Filter by Category' (All, Product A (2), Product C (0), Product B (1)), 'Find by Status' (Default), and 'Find by' (There are no tags). The 'Categorization' section shows 'Product B' selected. The 'Tags' section shows 'Tag1' entered. The 'Related Assets' section has a checkbox for 'Post Anonymously'. The form has 'Post Idea' and 'Cancel' buttons. The footer includes 'United States - English', 'Legal', 'Sitemap', and 'Copyright © CA 2013. All rights reserved.'

Figure 1: Post Idea

### How to add comments?

- Click “# comments” to expand the comments section and view existing comments or add comments to a specific idea.

- Click “Be the First” or “Add Comment” to add a comment.

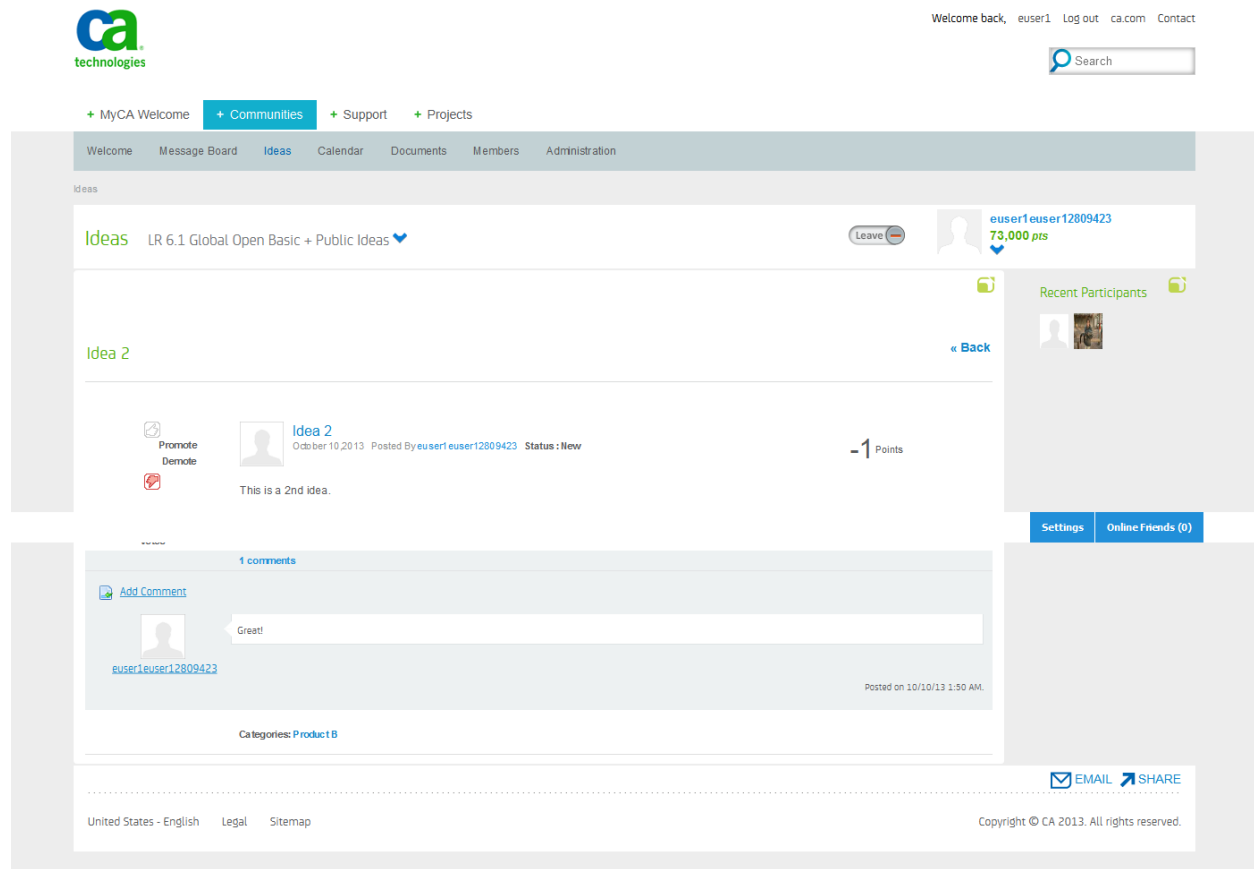


Figure 2: Click on “# comments”

### A user has the ability to Subscribe to one Idea or ALL ideas

Idea Action	IF SUBSCRIBE TO ALL IDEAS	IF SUBSCRIBE TO A SINGLE IDEA
Edit	✓	✓
Comment	No email will send in this case	✓
Add	✓	No email will send in this case

Note: If an Idea status is updated by an Idea Administrator, only the author of the Idea will receive an email notification.

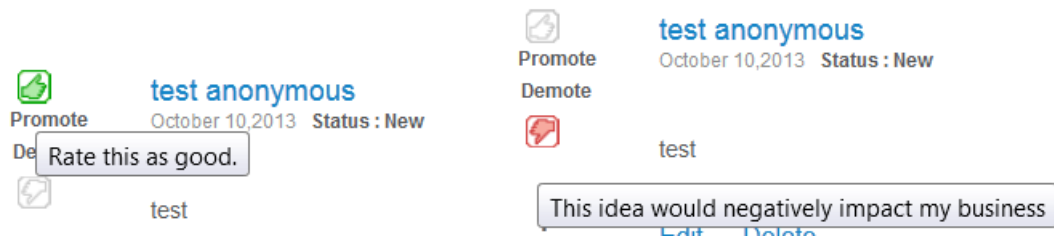
### Points and Votes

- Click on Promote
  - o Vote count increments 1

- Points count increments 1
- Click on Demote
  - Vote count increments 1
  - Point count decrements 1

Example: 7 Promotes, 7 Demotes = 0 points, 14 votes.

### Promote and Demote Tool Tips



**\*\*Please note, in the prior system (SFDC) each vote on an idea was scored +10 or -10. This changes in the new system to increments of +1 or -1.**

## List Ideas

By default, ideas are displayed in date/time order, most recent first.

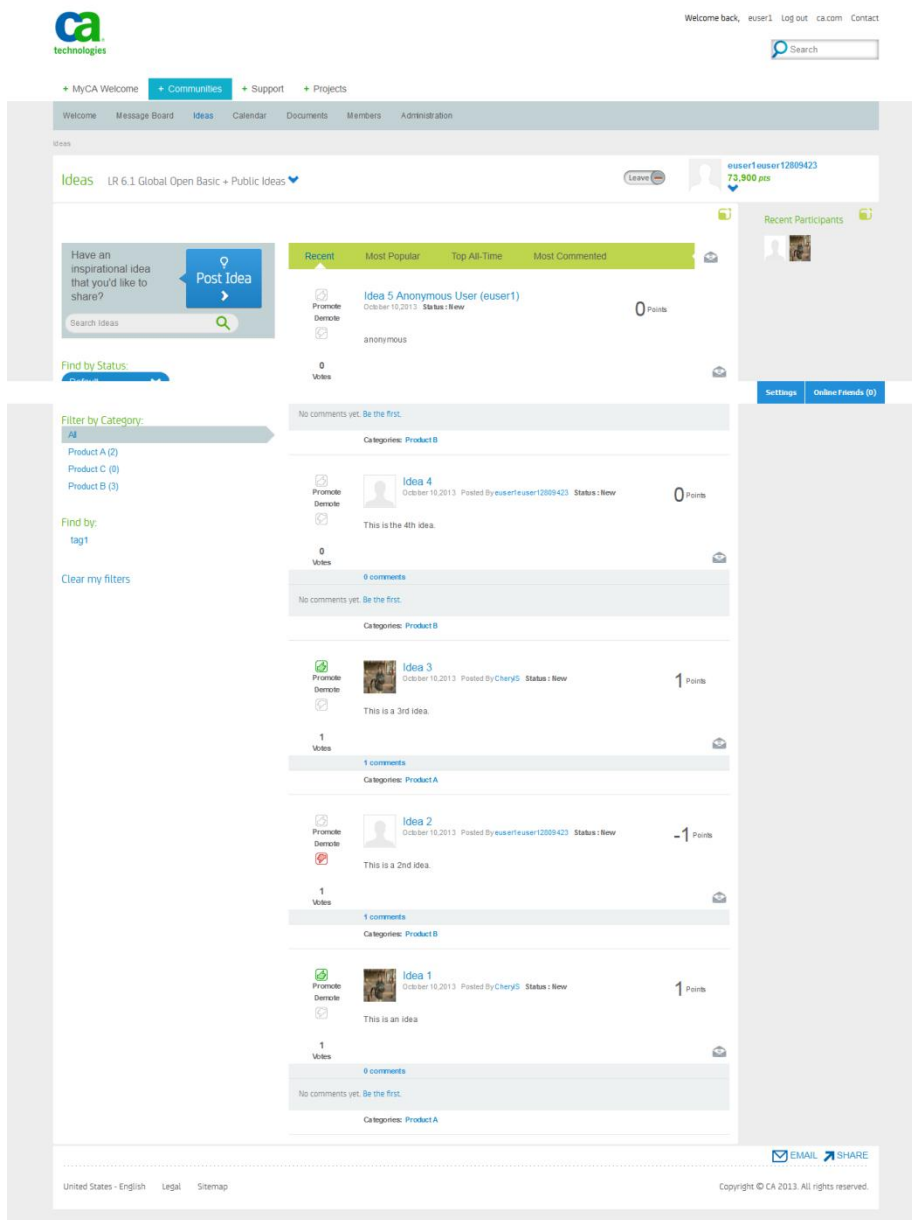


Figure 1: Ideas (note ability to subscribe to each idea as well as all ideas. Subscribe All Ideas icon is next to the Most Commented sorting option-top right)

## Sorting and Filtering

Filtering is applied in conjunction with the Sorting options available.

Sorting options:

- Recent: Shows ideas by postdate (most current date first)
- Most Popular: Shows ideas by Votes count (highest # of Votes first)

- Top All-Time: Shows ideas by Points count (highest # of Points first)
- Most-Commented: Shows ideas by Comment count (highest # of Comments first)

### Filter by Status

Only one Status can be selected at a time.

### Status Values

- New
- Under Review
- Currently Planned (to be delivered at a future date)
- Delivered
- Not Planned (idea has been reviewed and the idea will not be implemented)

### Filter by Category

Users can select one Category (product) at a time. Categories will be unique for each Community. Categories are maintained in Control Panel.

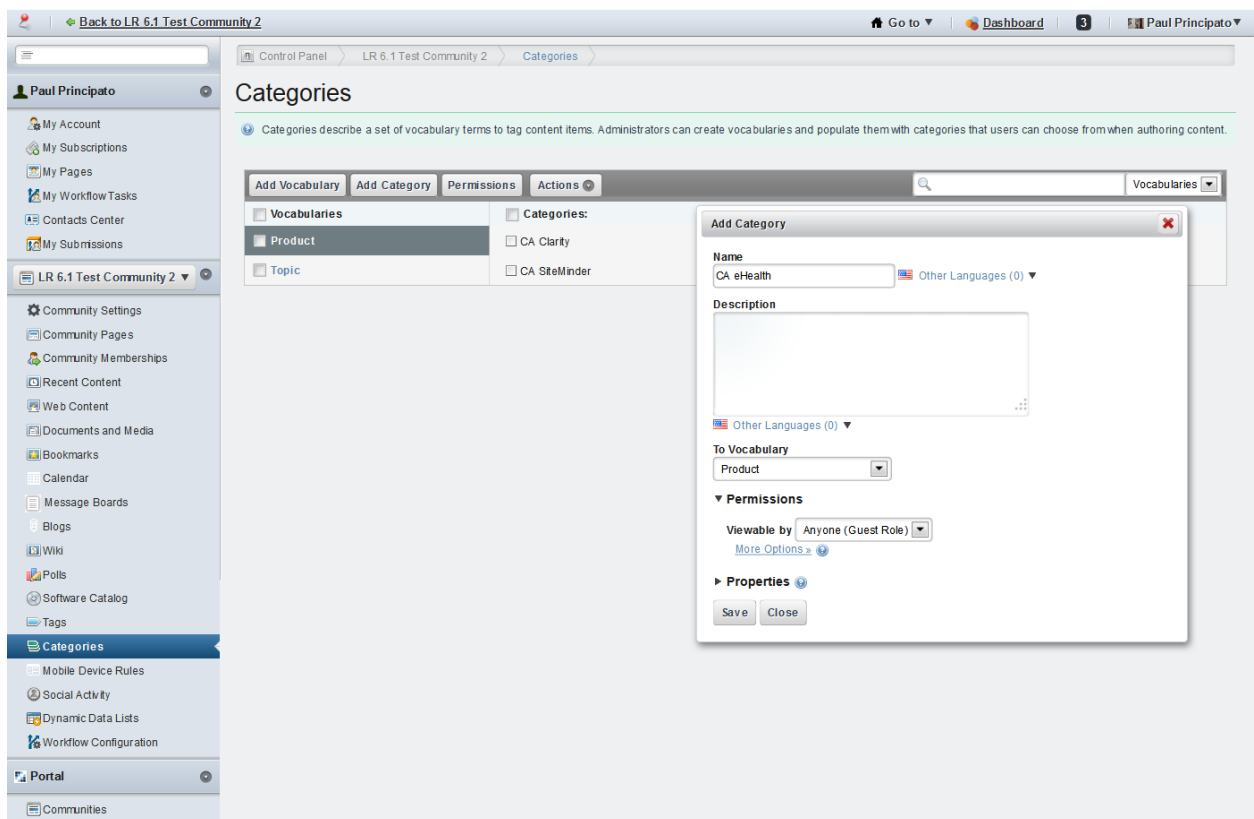


Figure 4: Control Panel - Categories

### Find By Tag Clouds

- If user clicks on a specific tag in the tag cloud, the tag will display at the top of the page. Only one tag can be selected at a time.

- To clear a tag, click the X next to the tag at the top of the list. “Clear my filters” does not clear the tag.
- When a Tag is selected, the Status and Category filters are ignored.

The screenshot displays the CA Technologies Ideas community interface. At the top, there's a navigation bar with links like 'Welcome back, Paul', 'Log out', 'ca.com', and 'Contact'. Below this is a search bar and a secondary navigation bar with 'MyCA Welcome', 'Communities', 'Support', and 'Projects'. The main header shows 'Ideas' and 'LR 6.1 Test Community 2'. A sidebar on the left includes a 'Post Idea' button, a search bar, and a 'Find by Status' section. The central area, titled 'Entries with tag test', lists three ideas: 'test anonymous', 'idea', and 'sdf'. Each entry shows the author's name, date, status, and a '0 Points' rating. A 'Recent Participants' sidebar on the right shows user avatars. At the bottom, there are links for 'Email' and 'Share', and a copyright notice for CA 2013.

□ Figure 2 Find by TAG

## Recent Participants

This allows users to click on a user’s Avatar and view their authored ideas.

- Displays up to 100 avatars. Simple pagination to scroll if list exceeds 100 users.
- When user posts an idea, his avatar displays at the top of Recent Participants.  
(Note: User avatars display only once -- so posting a 2<sup>nd</sup> idea, moves that user's avatar to the top of the list)
- If user posts anonymously, his avatar will not be added.
- When an avatar is clicked, the users' posts will display in date/time descending order.
- If user posts some ideas anonymously and some with his ID, his avatar will be displayed, but only "non-anonymous" posts will show when clicking the avatar.

### **Workflow**

- Who can update the status of an Idea?
  - a. Portal Administrator with Idea Administrator role in the community (must have BOTH)
  - b. Site Administrator + Idea Administrator roles in the community (must have BOTH)
- The workflow can be assigned to yourself or to another Idea Administrator in the community

### **Status**

Ideas start in Status = New.

- From New status, the Idea Administrator can ...
  - Set to "Under Review"
  - Set to "Currently Planned"
  - Set to "Delivered"
  - Set to "Not Planned"
  - After the status is changed, the Idea Administrator will not be able to set the status back to "New", since "New" is a one-time status.
- From Under Review status, the Idea Administrator can ...
  - Set to "Currently Planned"
  - Set to "Delivered"
  - Set to "Not Planned"
- From Currently Planned status, the Idea Administrator can...
  - Set to "Under Review"
  - Set to "Delivered"
  - Set to "Not Planned"
- Status = Delivered or Not Planned end the workflow.  
**\*\*IMPORTANT:** The workflow cannot be restarted once completed. It is extremely important for the Idea Administrator not to select one of these statuses if not desired.
- When the status of an idea is updated, a personal email is sent to the author of the idea.



### Sample email:

Dear Valued Customer,

Community: LR 6.1 Restricted Wiki + Public Ideas

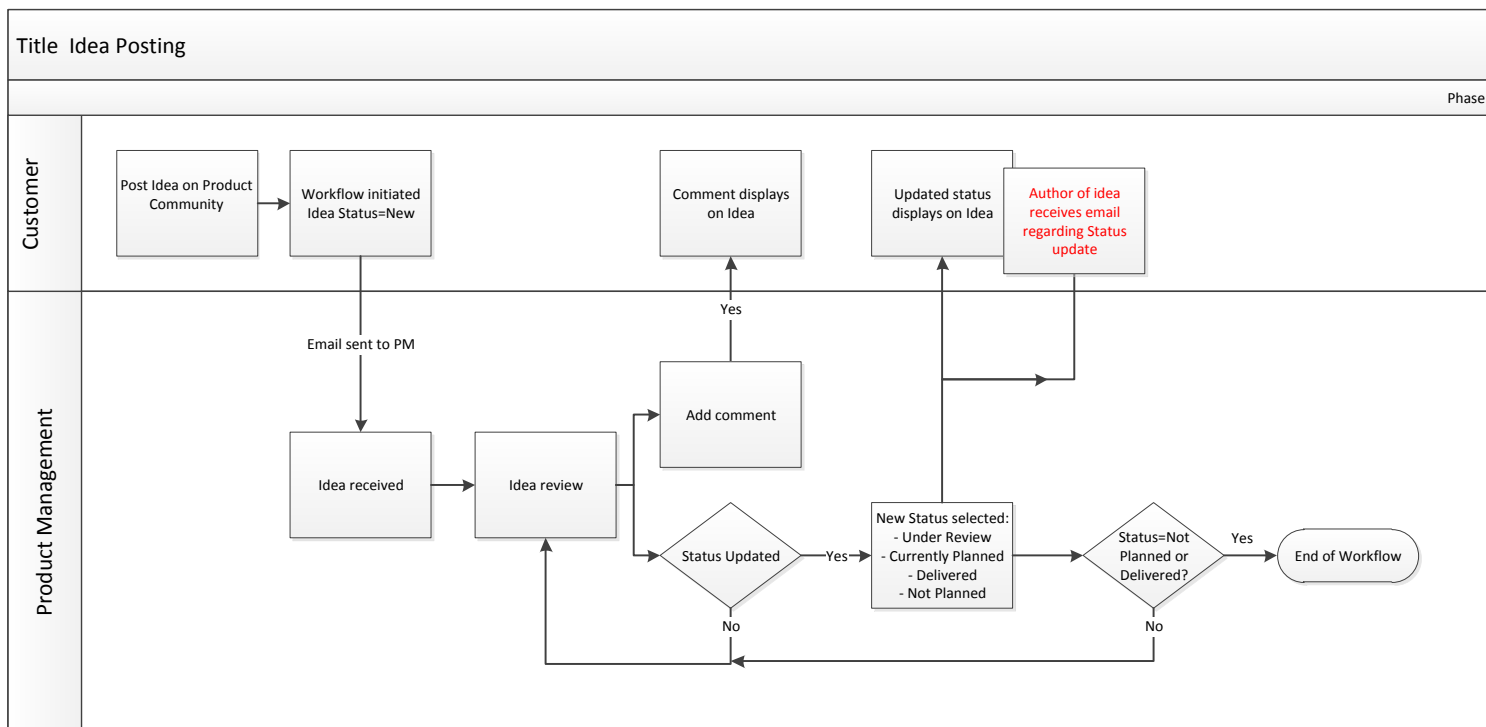
Idea Title: testing idea

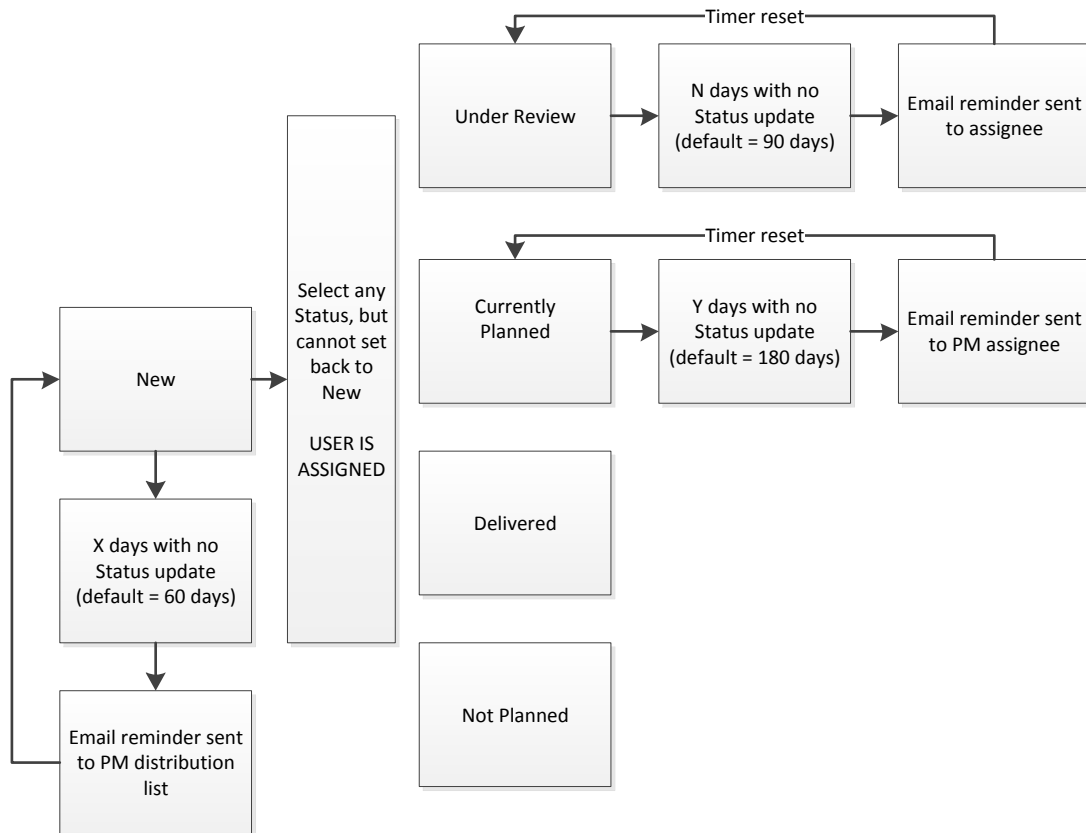
Your idea has been reviewed and the status has been updated to “Delivered”.

Please [Click](#) here to access your idea and review additional comments.

Thank you,

CA Technologies Product Management





## Steps for Ideation Administrators

1. Idea Administrator (IA) receives New Idea email notification.

Sample email:

Dear Cheryl Stauffer,

A new Idea has been created in the community LR 6.1 Test Community 2

Idea Title = new idea

Please [click here](#) to view the idea.

Sincerely,

Community Programs Team

[CommunityAdmin@communities-mail.ca.com](mailto:CommunityAdmin@communities-mail.ca.com)

2. IA clicks link in email to view idea.
3. IA clicks on Control Panel from their Community Page to update the idea status. See Figure A.

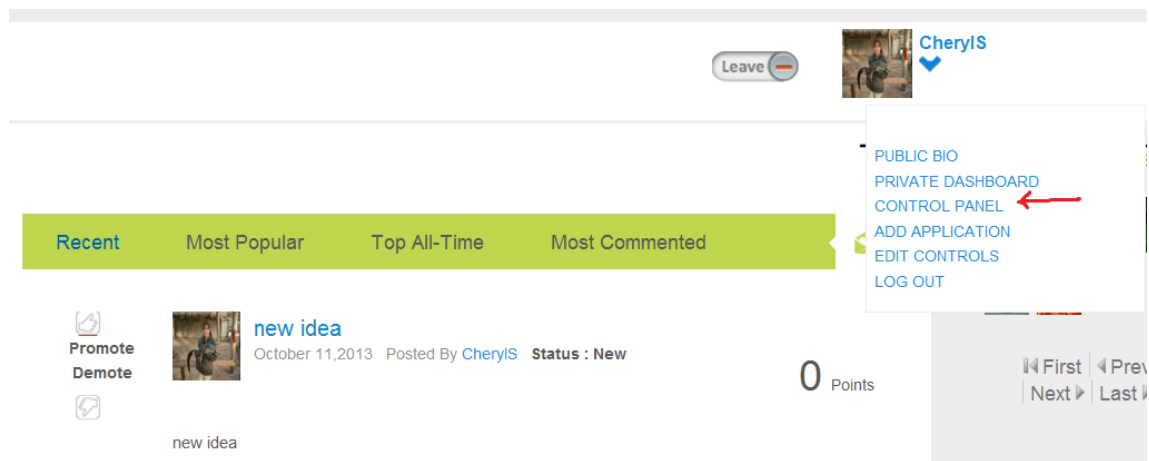


Figure A

#### 4. IA selects “My Workflow Tasks”

Back to CA Clarity Global User Community

Go to Dashboard Cheryl Stauffer

Control Panel Cheryl Stauffer My Workflow Tasks Pending

### My Workflow Tasks

Pending Completed

Advanced

**Assigned to Me**

Task	Asset Title	Community Name	Asset Type	Last Activity Date	Due Date	Actions
<a href="#">UnderReview</a>	<a href="#">testmeher</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/9/13 1:05 PM	1/7/14 9:06 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Fall is here</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/9/13 7:06 PM	10/9/13 7:08 PM	<a href="#">Actions</a>

Showing 2 results.

**Assigned to My Roles**

Showing 14 results.

Items per Page 20 Page 1 of 1 First Previous Next Last

Task	Asset Title	Community Name	Asset Type	Last Activity Date	Due Date	Actions
<a href="#">CurrentlyPlanned</a>	<a href="#">Idea 1</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 3:08 AM	4/8/14 3:08 AM	<a href="#">Actions</a>
<a href="#">CurrentlyPlanned</a>	<a href="#">posting the idea for testing</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/9/13 9:05 AM	4/7/14 9:05 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">new idea</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/11/13 2:27 AM	12/10/13 2:27 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">test</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 9:59 AM	12/9/13 9:59 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">test anonymous</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 9:46 AM	12/9/13 9:46 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">idea</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 9:02 AM	12/9/13 9:02 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Post an Idea as anonymously</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 8:53 AM	12/9/13 8:53 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Test on IE-7</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 6:49 AM	12/9/13 6:49 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">sdf</a>	<a href="#">LR 6.1 Test Community 2</a>	Ideas	10/10/13 6:31 AM	12/9/13 6:31 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Idea 6 anonymous (Cheryl)</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 2:19 AM	12/9/13 2:19 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Idea 5 Anonymous User (euser1)</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 1:57 AM	12/9/13 1:57 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Idea 4</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 1:49 AM	12/9/13 1:49 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Idea 3</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 1:45 AM	12/9/13 1:45 AM	<a href="#">Actions</a>
<a href="#">IdeasReview</a>	<a href="#">Idea 2</a>	<a href="#">LR 6.1 Global Open Basic + Public Ideas</a>	Ideas	10/10/13 1:43 AM	12/9/13 1:43 AM	<a href="#">Actions</a>

Showing 14 results.

Items per Page 20 Page 1 of 1 First Previous Next Last

Figure B

#### 5. IA locates the idea and clicks on the title.

## My Workflow Tasks

### IdeasReview: test 2 « Back

**Assigned to**  
nobody - [Assign to Me](#) - [Assign to...](#)

**State**  
IdeasReview

**Create Date**  
10/23/13 1:57 AM

**Due Date**  
12/22/13 1:57 AM - ([Change](#))

IdeasReview

- Assign to Me
- Assign to...
- Update Due Date

**Preview of Ideas**

**test 2** [View](#)

teste

By Paul Principato | Product: CA Clarity | cheryl

**Activities**

**Comments**

No comments yet. [Be the first.](#) [Subscribe to Comments](#)

#### 6. IA assigns the idea

- Select “Assign to Me” OR
- Select “Assign to <select another Idea Admin>” See Figure C.

IA’s can optionally add a comment during the assign phase. This comment will be shown in the idea’s Activities section in the Control Panel and is saved in the KALEO\_LOG database table. These comments are for internal use only. See Figure D. Once assigned, the idea will display in that IA’s “Assigned to Me” list at the top of the page.

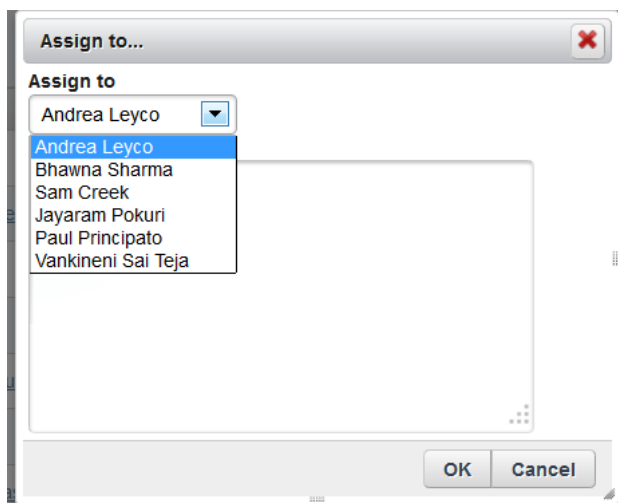


Figure C

#### 7. IA selects a new status <Figure D>

Refer to Workflow/Status rules. **IMPORTANT: Setting the Idea to Not Planned or Not Delivered ends the workflow. A Nimsoft ticket must be opened to change the status and the workflow cannot be restarted.**

From the Idea details screen, IAs can add internal comments for the Idea. IAs can subscribe to these comments. These comments are saved in database tables MB\_MESSAGE and MB\_DISCUSSION.

When a new status is assigned...

- Author of the Idea receives an email notification
- Idea returns to unassigned state (no longer appears in “Assigned to Me”)
  - IA can optionally assign the idea back to “me”
- Notification due date is set for # days, depending on the status selected (when due date is reached, an email will be sent to the IA if it is assigned; it will be sent to all IAs for the community if the idea is unassigned)

**NOTE: It is best practice not to manually change the Due Date. Doing so can disrupt notifications for that Idea to Idea Administrators.**

**\*\*Best Practice:** IA should add a comment on the Ideas Page in the community with details for the customer – only this comment can be viewed by the customer base. Customers who are subscribed to the idea will receive the comment. This is a valuable way to communicate to our customers.

The screenshot displays the 'My Workflow Tasks' interface. At the top, a green banner indicates 'Your request completed successfully.' Below this, the task 'IdeasReview: test 2' is shown, assigned to Paul Principato. The 'Create Date' is 10/23/13 1:57 AM, and the 'Due Date' is 12/22/13 1:57 AM. A 'Preview of Ideas' section shows a task 'test 2' by Paul Principato. The 'Activities' section lists two actions: 'Task initially assigned to the Idea Administrator role. Assigned initial task.' and 'Paul Principato assigned the task to himself.' The 'Comments' section is empty. A sidebar on the left lists various community management tools, and a right sidebar shows a status menu with options like 'NotPlanned', 'CurrentlyPlanned', 'UnderReview', 'Delivered', 'Assign to...', and 'Update Due Date'.

FigureD

8. The IA repeats Steps 3 through 6 to change the status until the end of the workflow is reached: Status is set to Not Planned or Delivered.

## ***Reporting***

Idea reporting is intended to provide a comprehensive look at the ideas that have been submitted, their status, and their owner. There will be a monthly report which will be uploaded to a location on the Community Team site. The report consists of these fields:

- entryId
- communityName
- userName
- emailaddress
- siteID
- accountID
- createDate
- Idea\_title
- Idea\_content
- isAnonymous
- voteCount
- points
- product\_category
- status
- assignedto
- due date

Other reports can be created if needed. Please open a CR to request other details about the Ideas.