



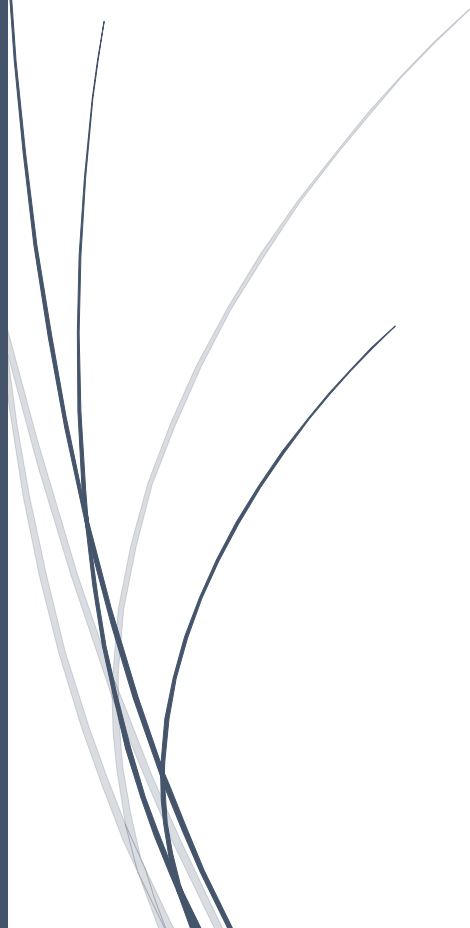
RESEARCH
IN FINANCE

Digital Diaries

Getting Started with Digital Diaries

Desktop Guide for Participants

Version 1.0 – February 2023



Introduction

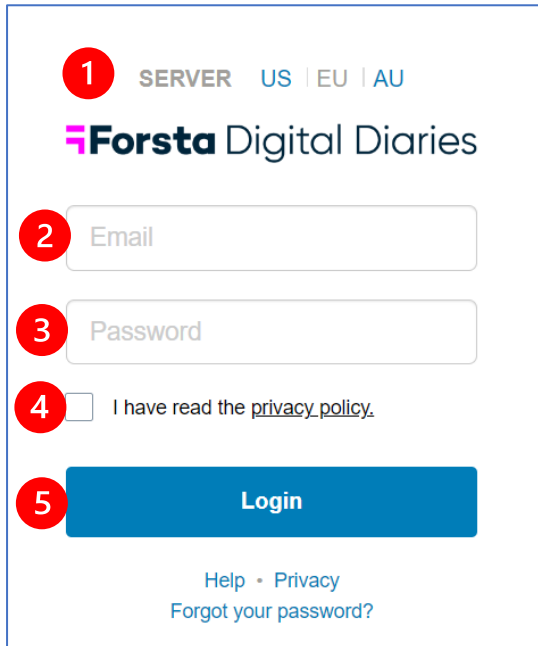
To help navigate the Digital Diaries platform and complete the community activities, we have prepared this basic introduction into the Digital Diaries desktop platform. This will focus on:

1. Logging into the community
2. Registering and creating your community profile
3. Submitting your activity answers
4. Editing your submitted answers
5. Submitting your Concept Canvas activity answers

Whilst the Digital Diaries platform is fairly easy to use and navigate, should you encounter any problems or have any questions about the platform or the community, please do contact the Research In Finance team who will be happy to assist you.

Logging in to the Community (On Desktop)

You can navigate to the community login page by using the URL weblink received in your invitation email. This email will also contain a temporary password for you to use when logging into the community.



The screenshot shows the login interface for 'Forsta Digital Diaries'. At the top, there are server selection links: 'SERVER', 'US', 'EU', and 'AU'. The 'EU' link is highlighted. Below this is the 'Forsta Digital Diaries' logo. The main form contains three input fields: 'Email' (step 2), 'Password' (step 3), and a checkbox for 'I have read the [privacy policy](#)' (step 4). A blue 'Login' button is at the bottom (step 5). Below the button are links for 'Help', 'Privacy', and 'Forgot your password?'.

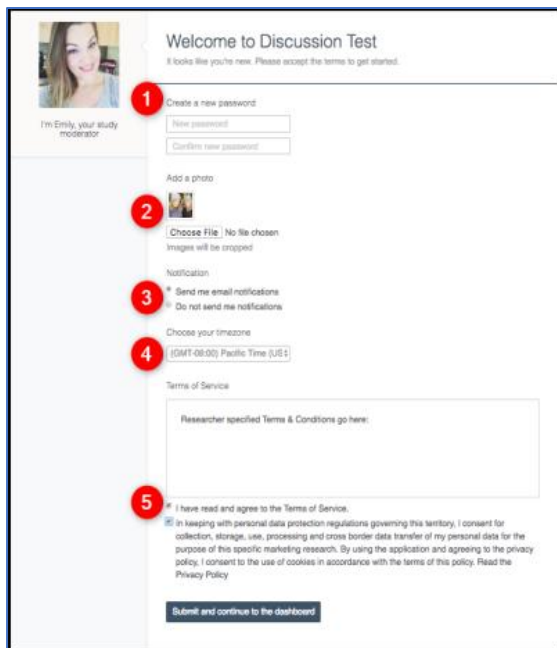
- 1) **Server:** On opening the login screen, please ensure the server is set to EU. The selected server will be grey, and the URL will change to show the selected server.
- 2) **Email:** Please enter your email address. This should be the email address that the Research in Finance team used to contact you.
- 3) **Password:** Please enter the password received in your Research in Finance invite email. This is a temporary password that is set for the project.

Note: If you have forgotten your password, you can click "Forgot your password?" to have a reset link emailed to yourself. If you are still having issues logging in, you can contact technical support by clicking "Help." Or alternatively by contacting Research in Finance for assistance.

- 4) **Privacy policy:** Please read the privacy policy and then select the tick box to confirm you have read the policy.
- 5) **Login:** Once you have entered the details above, please select 'Login' to enter the community.

Registering / Creating your profile (On Desktop)

When you log into a community for the first time you will see a registration page, where you should do the following:



1) **Password:** Create a new password. This will then be your password every time you login to the community for the duration.

2) **Avatar:** You have the option to upload a profile photo should you wish.

3) **Notifications:** Please confirm your notification preferences. The default is being opted-in to receive emails and push notifications from the community / research team. We would recommend that notifications are left on to allow you to keep up to date on any actions required and to respond to any messages received from the research team.

- Email notifications will include moderator (research team) and participant comments, messages and Daily Digest summaries.
- Mobile push notifications will include moderator and participant comments and messages.

4) **Time Zone:** Please select your time zone.

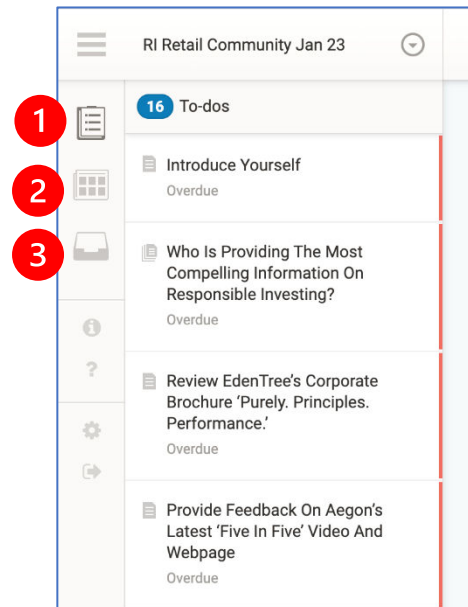
5) **Terms and Conditions:** Accept the project Terms and Conditions and Privacy Policy. This will include a brief summary of the community project (i.e. what is required from you as a participant, the date the community closes, etc).

On completion of the registration, you will be taken to the community page. **On your first visit you will see the instruction window on how to navigate and complete the community. Please read these instructions.** If you encounter any problems, please contact the Research in Finance team who will be happy to assist you.

Menu Bar

On the top left of the screen you will see the community name and navigation menu.

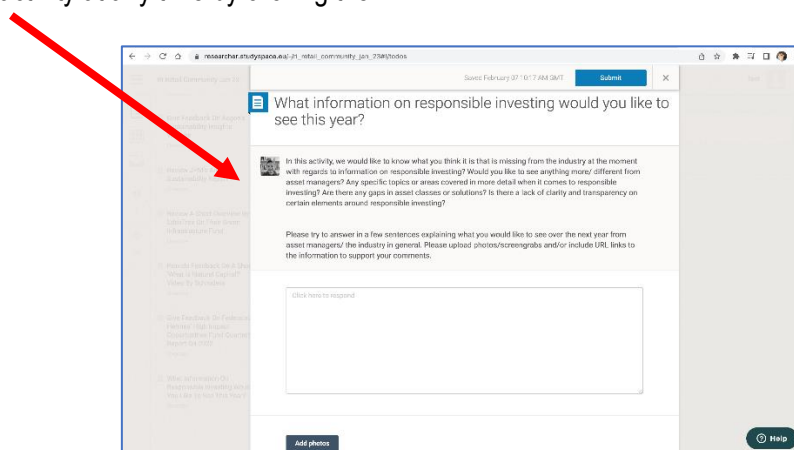
1. 'To-dos' – lists any activities to be completed. Once an activity is completed, it will move to the 'Feed' folder.
2. 'Feed' – lists all of your submitted / completed activities. You can also edit any previously submitted activities if required.
3. 'Inbox' – lists any messages from the research team during the community.



Submitting an Activity (On Desktop)

Clicking on an activity in the **To-Dos** list enables you to view, answer and submit the activity. Please scroll down to ensure all questions have been answered before clicking 'Submit'.

Draft responses autosave when you start an activity and then stop for three seconds or more. Once you have finished answering the activity you can click the "Submit" button to submit the activity. You can also choose to close the activity at any time by clicking the "X".



After closing or submitting an activity, you will be taken back to the 'To-Dos' list page.

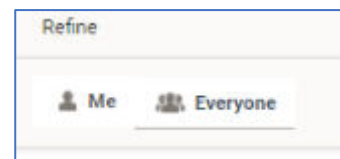
Completion Notices

Upon returning to the 'To-Dos' area after submitting an activity, you will see a notification that reads "Thanks! Your work has been submitted." If you make an entry to a social activity this notification may state, "You just completed a social activity! Visit the feed to see what other participants are saying."

The Feed Page

The 'Feed' page is where you can see and edit your submitted responses. You can also view, comment, and like other people's responses in this section once they, and you, have completed an activity.

- **Me:** This tab allows you to view your own responses to activities.
- **Everyone:** This tab allows you to view the responses for social activities, or from other participants. Here you can comment and like their feedback if you wish.



To filter by activity, you can select an activity name on the left side of the screen, this will filter the feed list by that activity. To filter by person, click on the avatar of the person whose completed responses you wish to view.

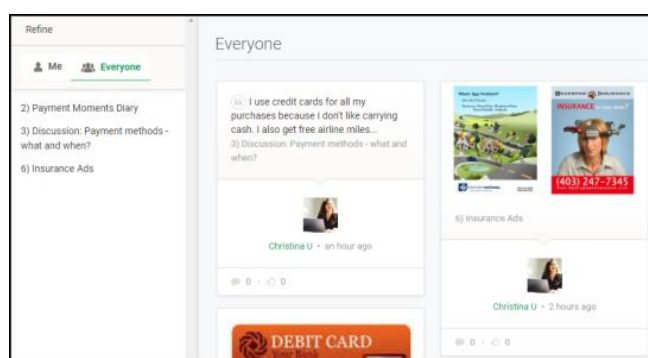
Editing a submitted Activity (On Desktop)

After you have submitted an activity, you can still edit it at any time from the 'Feed' menu.

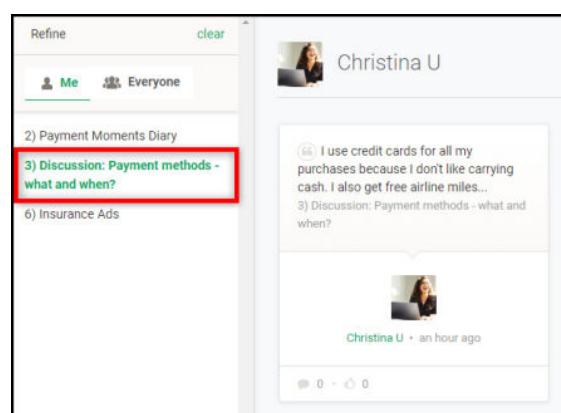
Accessing the Activity

To edit an activity, you must first go to the home page and select the 'Feed' button on the left menu bar. From here, you will see a list of all your submitted activities for the community under the 'Me' tab (the 'Everyone' tab shows other participant responses to an activity).

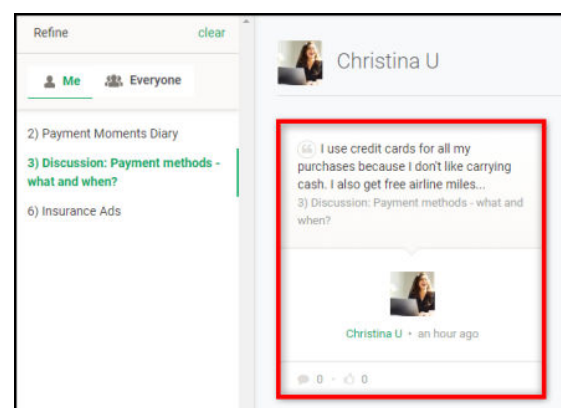
Click the 'me' button at the top of the list to view just your own activities. You can then click the name of the activity that you would like to edit.



You can then click onto the tile for the activity to go directly to that activity and make any changes you desire.



Once you have finished making changes, you can click "Submit" to submit the revised activity to the system.



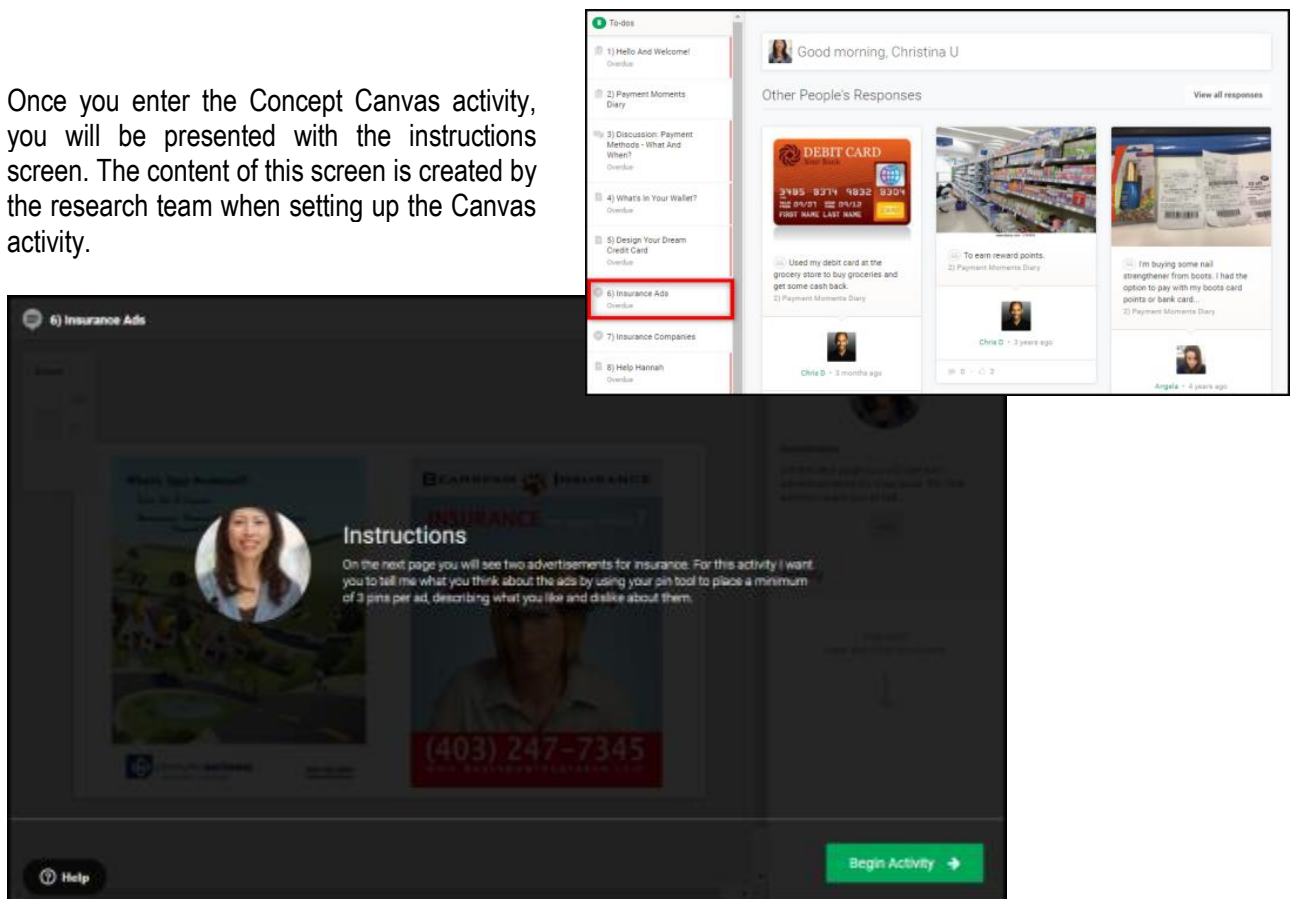
Submitting a Concept Canvas Activity (On Desktop)

‘Concept Canvas’ activities are activities that focus on a specific image. Here we will ask you to place a pin on a specific image to identify your thoughts and feelings (both positive and negative). You will also be able to comment on the pins you place to explain why you have placed the pin in that location and why you felt the way you did. In some cases you will also be able to assign labels to the pin (if labels have been created for the activity).

Accessing Concept Canvas Activities

Concept Canvas activities appear in your To-Do list by order of launch time. By clicking on the concept canvas activity the activity will open up for you to complete.

Once you enter the Concept Canvas activity, you will be presented with the instructions screen. The content of this screen is created by the research team when setting up the Canvas activity.



Completing Activities

Once inside the activity, you can view and add pins to the image uploaded by the researcher. The following options are available:

1. Zoom: By default, the image for the activity is sized to fit your screen. However, If you would like to see the image at full size, click the "+". To refit the image to your screen select the "-".

2. Pin: To place a pin all you need to do is move your cursor to the area of interest and click. Once you click, the pin window appears allowing you to add your answer with any labels and comments related to the pin.

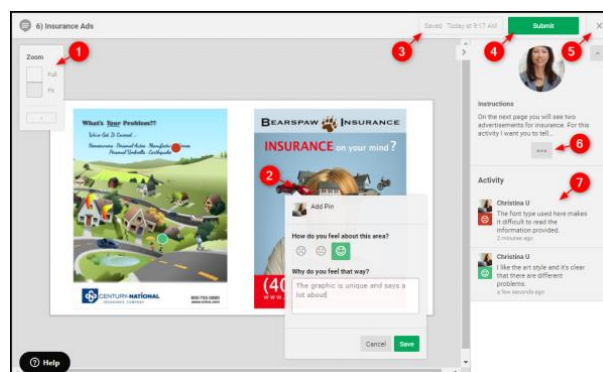
3. Save: Canvas activities autosave as you are completing them.

4. Submit: Once you are done placing your pins, you can submit the activity.

5. Close: If you do not want to submit the activity yet, you can close it by pressing the "x". Any pins you have created will be saved automatically and the activity will appear as a draft in your To-Do list.

6. Instructions: If you need to access the instructions again you can do so by clicking the "..." shown on the right-hand side of the screen.

7. Pin Feed: On the right-hand side of the image is the pin feed that shows existing pins. Hovering over a pin entry highlights it on the image. The pin feed can be collapsed by clicking the ">".

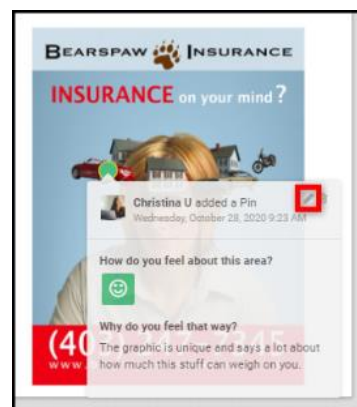


Submitting Activities

Once you submit a Canvas activity, you will receive a success message and then you will return to the To-Do list area. There will now be a tile representing this entry and the activity will be removed from your To-Do list.

Editing Activities

To edit a pin, you must first open the submitted activity. At that point, you can view your pins by either hovering over the pin on the image or the entry in the pin feed.



Once the pin window is open, you can select the pencil icon in the top right corner to edit the pin. Once you have finished you must submit the activity again to save and keep any changes.