



Fingertip Teams User Guide

Getting started with Fingertip Teams

2021-06-22

Welcome to Fingertip - Introduction

- This User Guide is the step-by-step experience for you as the end users to learn the day-to-day usage of Fingertip.
- Please use this guide to succeed in your Fingertip journey.
- The initial learning process takes around 30 minutes.

User Guide - Table of Contents





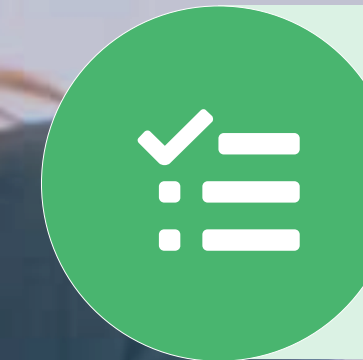
Fingertip Overview

How Fingertip helps you to get things done

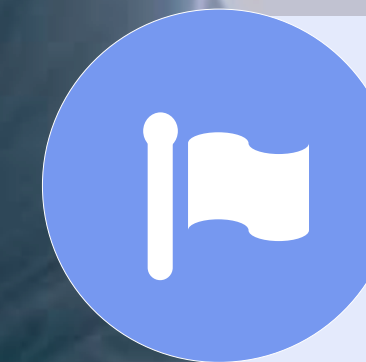
2021-06-08



Plan



Execute



Measure



Optimize

Fingertip – the best leadership app on Teams

Get your team working together with modern leadership practices,
transparency and digital collaboration



FINGERTIP.

Are you a data-driven, people-first
knowledge company eager to unleash
your potential?

Fingertip is for you!

Fingertip is a state-of-the-art tool for increasing
productivity and reducing uncertainty designed for
Microsoft Teams.

Improve leadership with transparency in planning and
execution, from decision making to strategy.

Fingertip is easy to install and learn, and you'll instantly
start creating additional value for your company and
customers.

How does it work? Keep reading to find out!



FINGERTIP.

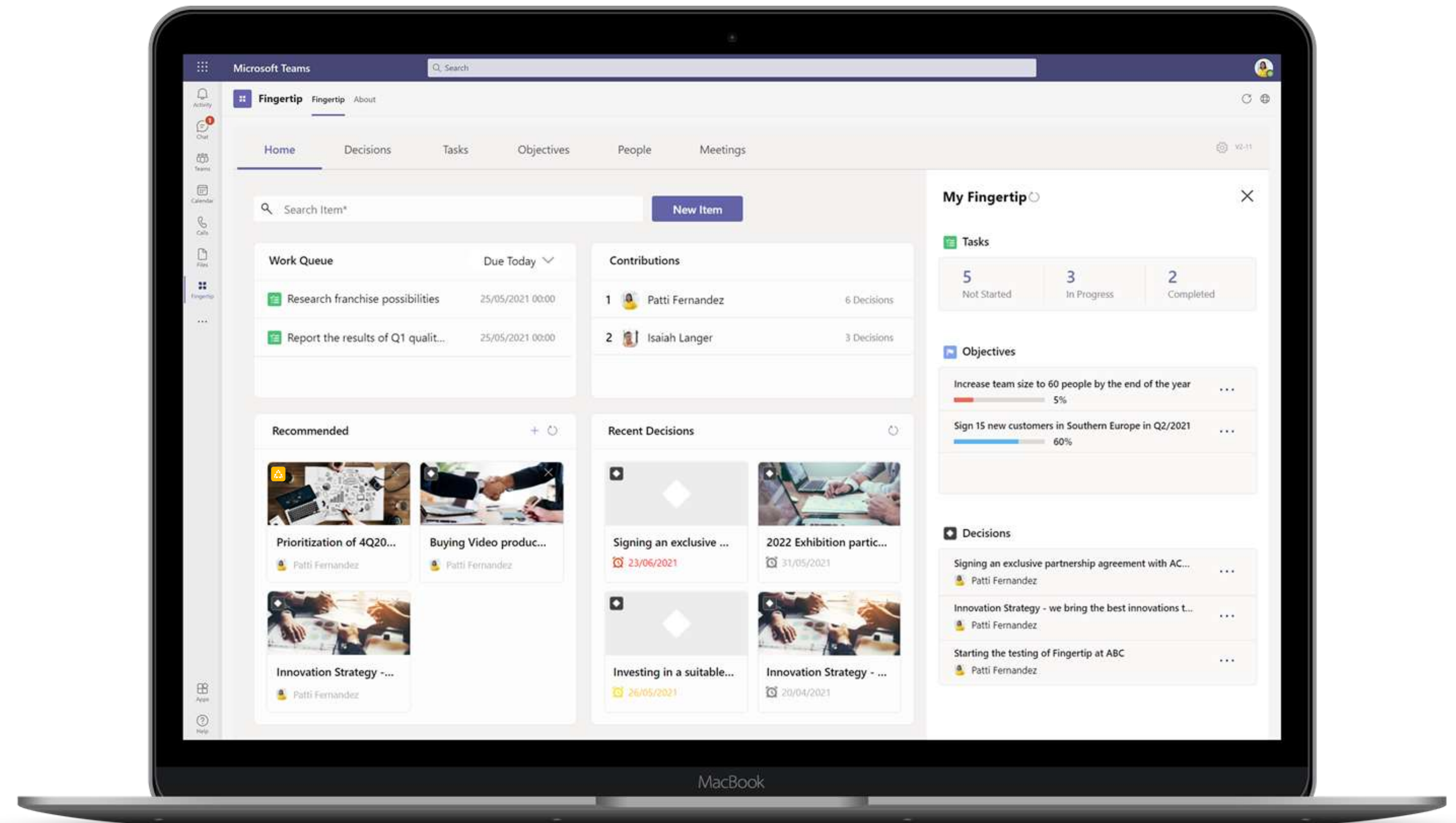


Fingertip – the best leadership app for Teams

Fingertip is a new business workspace in Microsoft Teams that provides decision making, objectives setting, meetings management, business planning, and more.

Fingertip is the system of record for organizational leadership. It is the just-in-time digital solution for facilitating decision making, objective-oriented productivity and value-creating collaboration - manifesting in an intuitive business leadership system built for the Microsoft Teams and Salesforce platform.

For an individual knowledge worker, Fingertip offers structure in the short and long term, as well as a bird's eye view to their nearby colleagues' workflows. It gives confidence to start and finish creative project work at any level of the organization.



How does Fingertip boost leadership for my Teams organization?



Lead with transparency

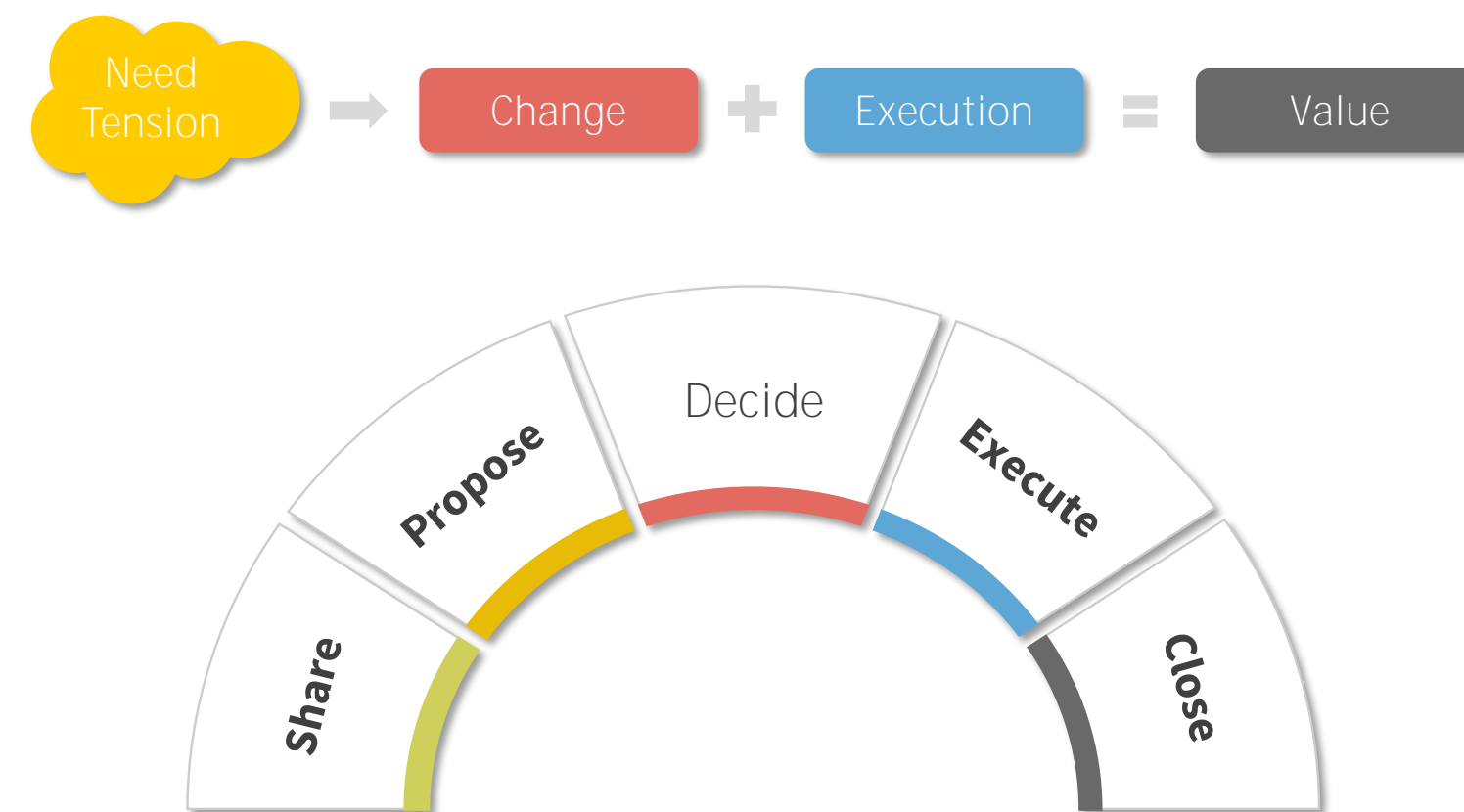
Engage and empower with responsibility



- Visibility to objectives for all employees
- Ensure relevance to subject
- Transparency to task execution
- Minimize deliberate reporting and documenting

Gain #Value faster

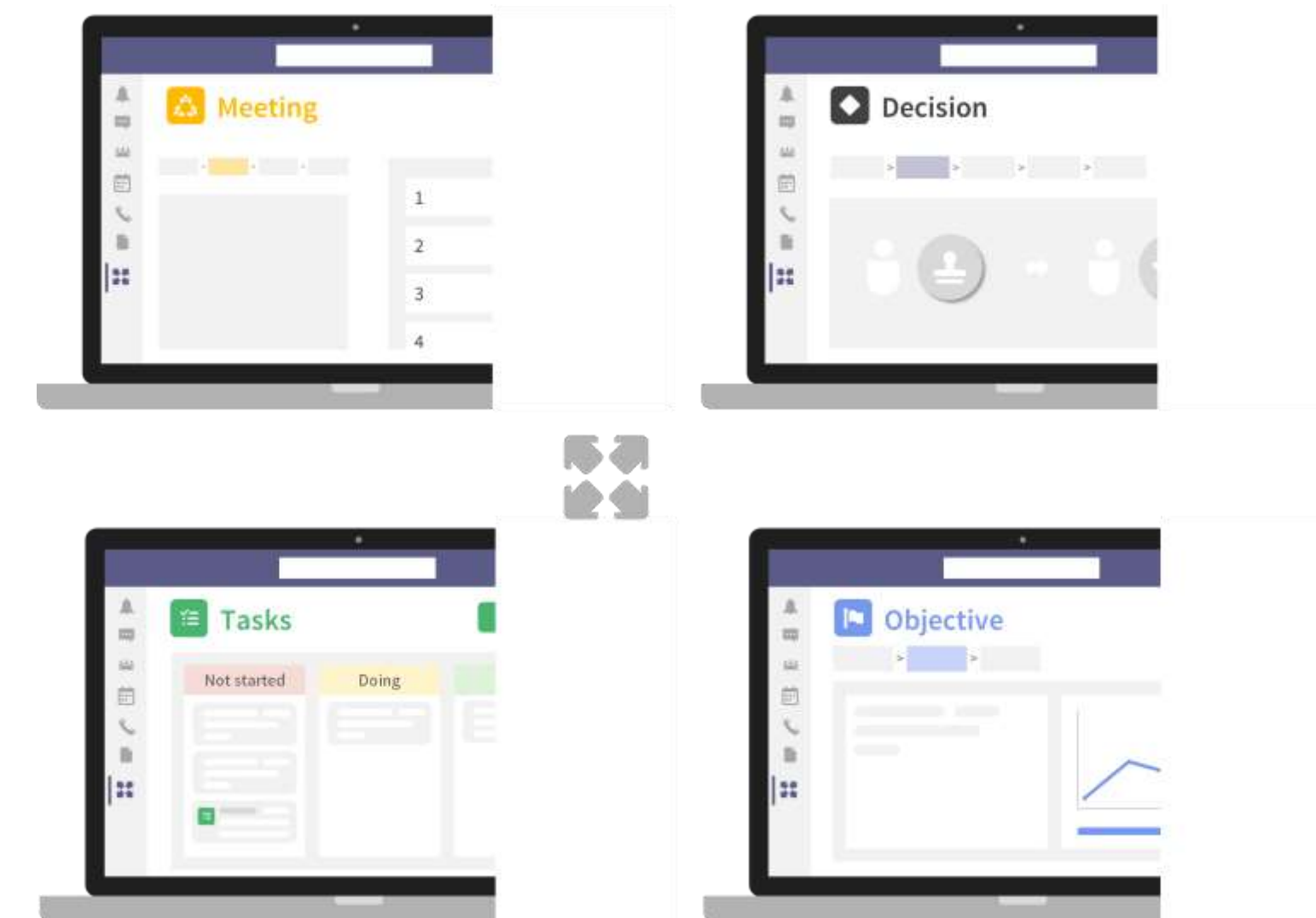
Speed up ramping ideas to activities



- Measurable process for decision making
- Objectives, tasks and meetings that support daily activities
- Support learning and value creation
- Transparent and simple to lead
- Strengthen participation and collaboration

#Situational awareness

Clarify the common big picture



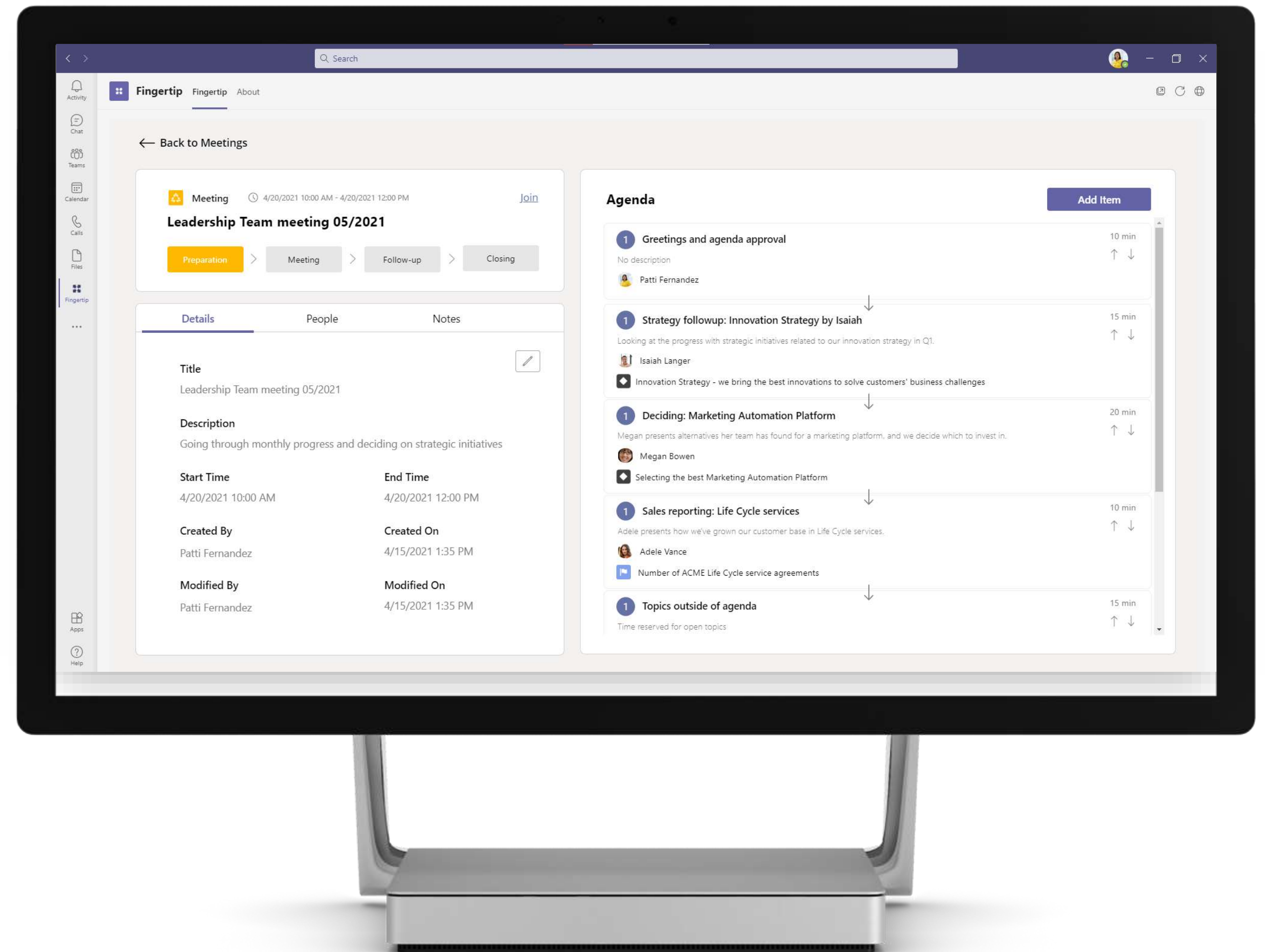
- Collaborate in real-time
- Always stay up-to-date
- Systemic co-dependency for all your business objects
- Predictive measuring



Fingertip speeds up business in Teams

10 x Fingertip Teams product highlights and how they benefit your leadership, work and business.

- 01 Command center for Leadership
- 02 Collaborative Decision process and approvals
- 03 Digital real-time Decision Log
- 04 Make your Meetings meaningful
- 05 Track your Objectives
- 06 Manage your Tasks
- 07 Transparent Work



Waste less time identifying underlying issues and more time solving them

All the information for a leader in one place. Tackle the immediate, pressing issues from a unified starting point. Identify the problems that are slowing your teams down and act on them

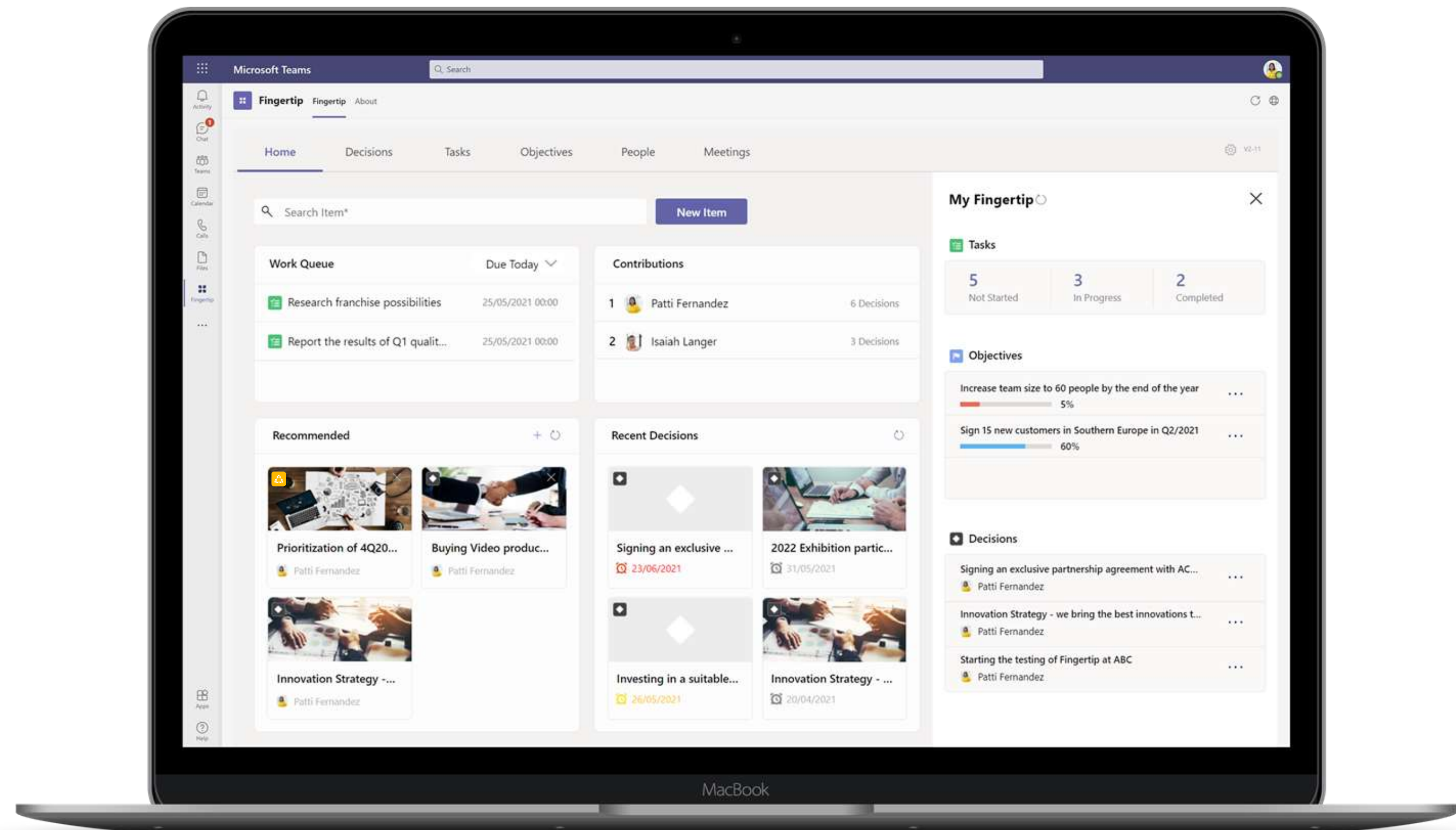
01

Home - Command center for leadership

Fingertip home page shows the most important and urgent decisions, tasks, objectives, and meetings that you need.

It summarizes organizational performance to easily digestible metrics, so you'll instantly see if something is not working.

The home page gives valuable insights from individual employees to the organization as a whole.



FINGERTIP.

Get your decisions right the first time to spare time and effort

Involve responsible parties earlier, receive valuable input to make better informed decisions, improve decision quality, minimize miscommunication, get going faster in execution with digital approvals.

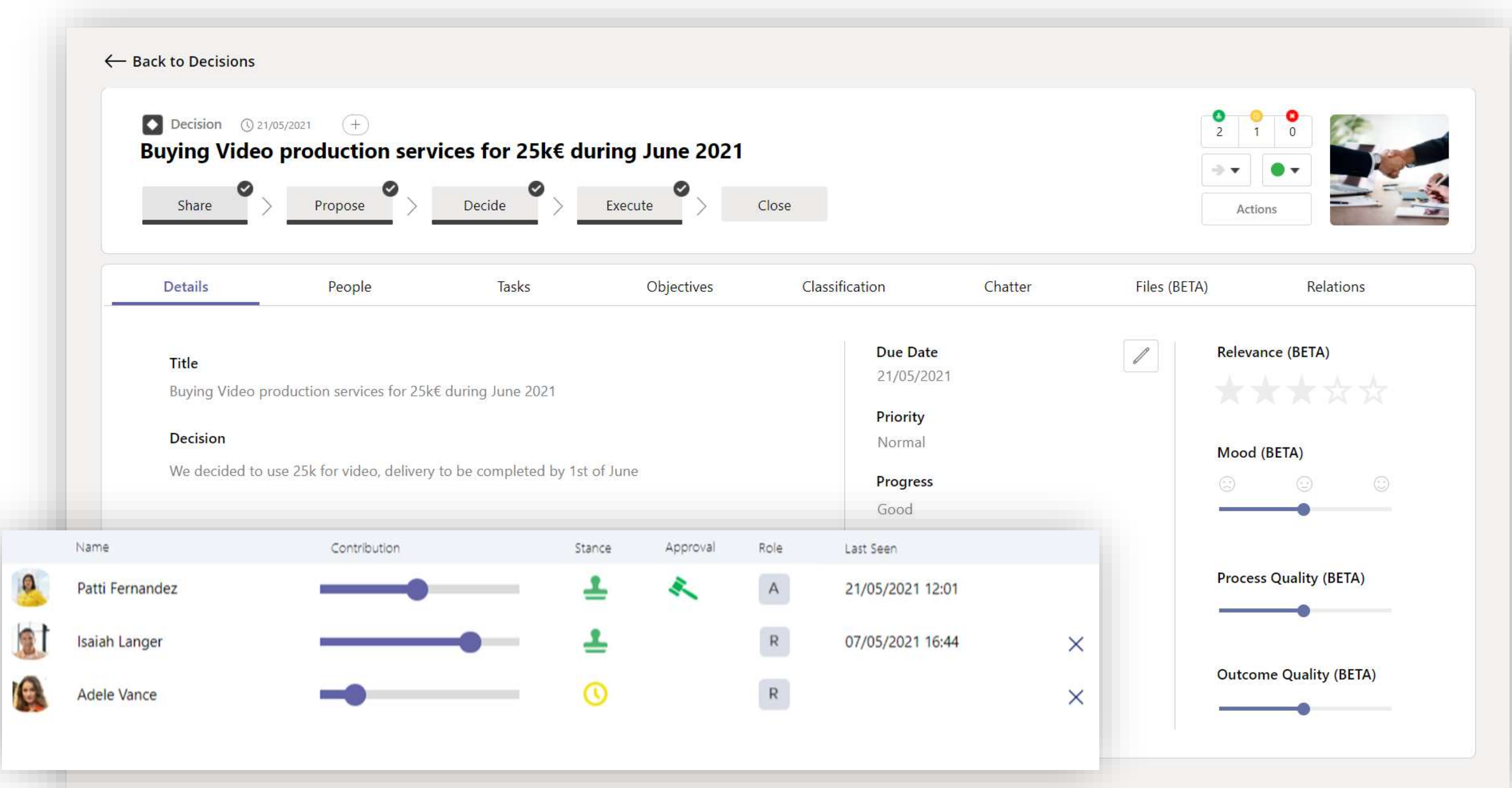
02

Collaborative decision process and approvals

Our decision lifecycle supports decision makers anywhere to make more mindful decisions.

By inviting teams to collaborate in the decision making process, you get their buy-in earlier and make decisions more accurately.

Fingertip allows you to start decision processes instantly and sees them all the way through to execution and archiving.



Documented decisions are a treasure chest for knowledge and innovation

Documenting discussions, data and situational understanding in past decision making opens up a wide array of benefits. Learning from mistakes and failed decisions, duplicating excellent processes and structuring organizational knowledge are just some ways you can gain value from documenting decisions.

03

Digital real-time decision log

Decision log is a systematic and logical archive of decisions you have made.

It summarizes the knowledge decision makers had at the time of making a decision and how everything played out.

This all adds to an organization's capability to use that information as a basis for better decision making in the future.

Home

Decisions

Tasks

Objectives

People

Meetings

Decisions

7 Items

1

0

Search for a Decision

New Decision

Progress	Title	My Stance	Status	My Role	Decision	Phase	Due Date	Accountable	
<div></div>	Starting the testing of Fingertip at ABC	<div></div>	<div></div>	<div>A</div>	The launch date for Fingertip i...	Decide	08/05/2021	Patti Fernandez	>
<div></div>	Selecting the best Marketing Automation Pl...			<div>A</div>		Share	20/04/2021	Patti Fernandez	>
<div></div>	Webinar series	<div></div>	<div></div>	<div>R</div>	Budget decision to increase va...	Close	10/05/2021	Isaiah Langer	>
<div></div>	2022 Exhibition participation	<div></div>	<div></div>	<div>R</div>	Initial plan. Barcelona, New Yor...	Propose	31/05/2021	Isaiah Langer	>
<div></div>	Prioritization of 4Q2021 Project Ideas			<div>A</div>		Share	30/06/2021	Patti Fernandez	>
<div></div>	Buying Video production services for 25k€ d...	<div></div>	<div></div>	<div>A</div>	We decided to use 25k for vid...	Execute	21/05/2021	Patti Fernandez	>
<div></div>	Innovation Strategy - we bring the best inno...	<div></div>	<div></div>	<div>A</div>		Execute	20/04/2021	Patti Fernandez	>

Eliminate pointless meetings that should have been emails

Ensure agenda items are relevant to participants, engage in discussion before and after the actual meeting, create work items that actually get done and make every meeting an important one.

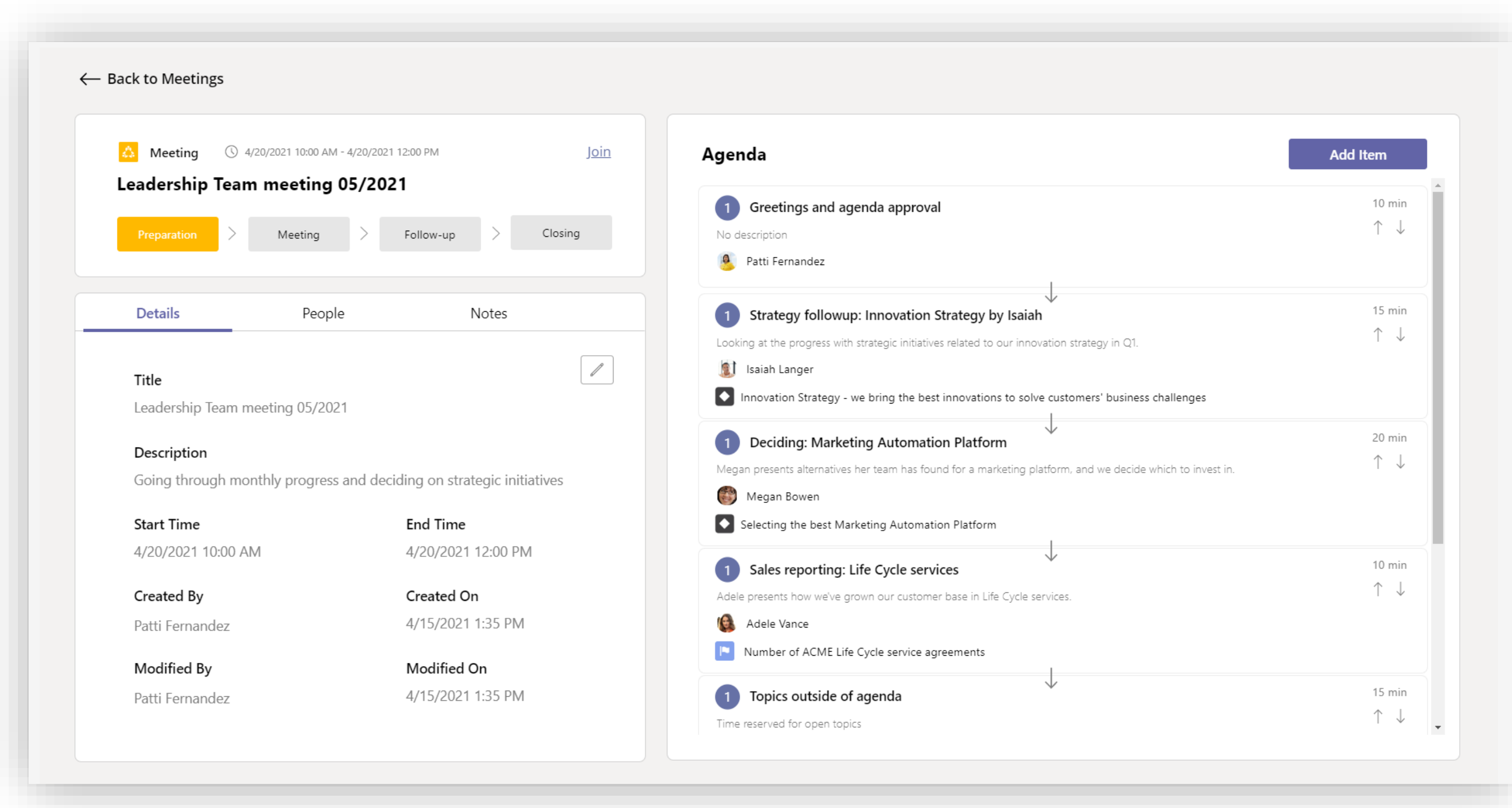
04

Make your Meetings meaningful

Fingertip's meeting agenda tool ties each bullet point to an actionable and accountable business object.

Make action, measurement, change and decisions the core content of meetings and get more out of every minute with clarity.

Share knowledge with the right people at the right time to make the most of your meetings.



Focus and measure the most profitable processes and activities

Increase understanding of your business goals, get more focus on outcomes, not activities, prioritize the business-critical work and notice early when performance reduces.

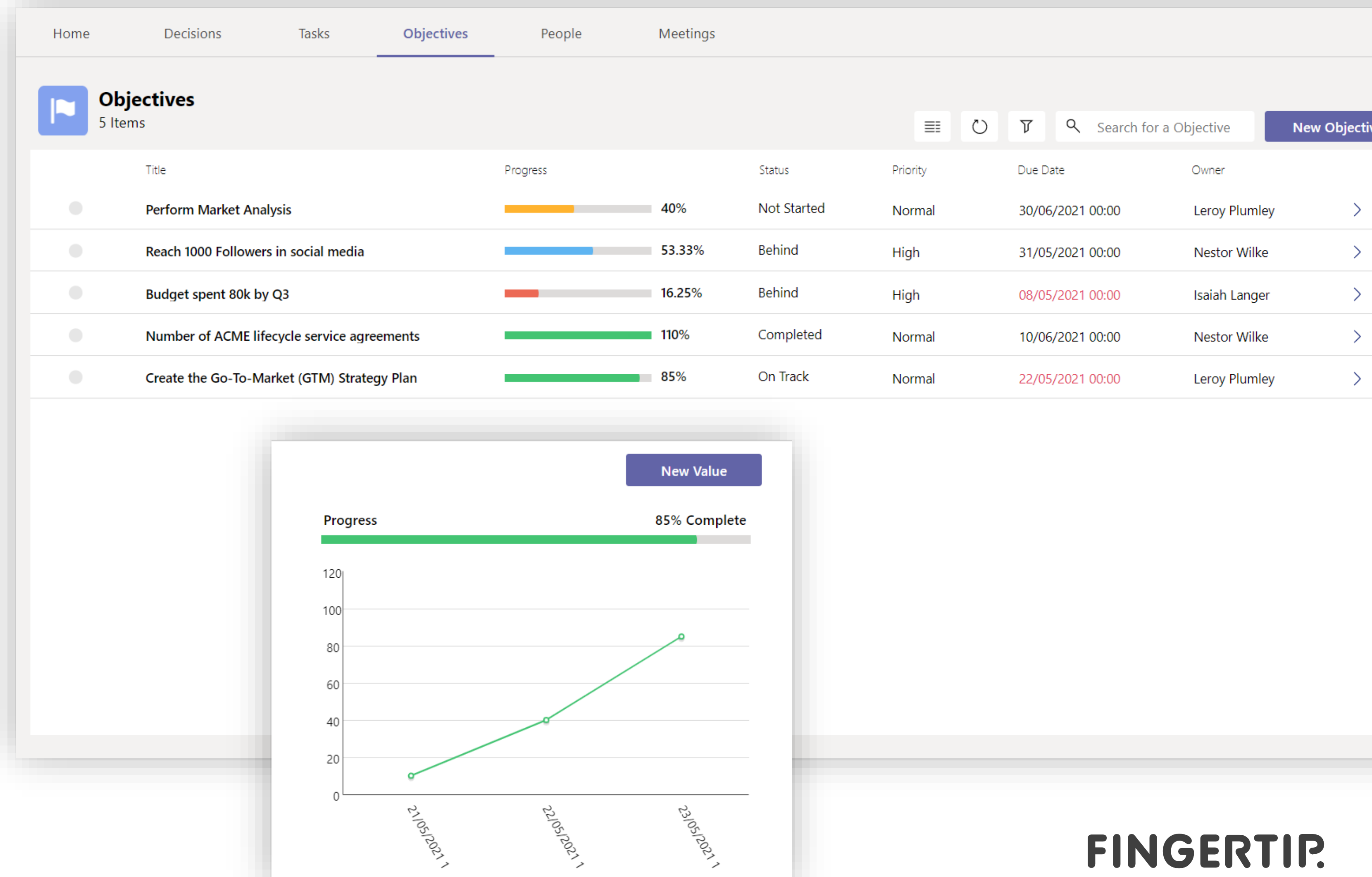
05

Track your Objectives

Our objectives management creates a transparent system for goals that focus on results, not activities.

Setting deadlines and defining accountabilities ensures the objectives are actively followed and any problems can be tackled early.

It also gives gratification to each involved individual for seeing your efforts turn into measurable successes.



Simplified task lists reduce down time and reward productivity

Visualize your backlog and understand the high priority tasks you should perform first. Assign tasks to others to distribute workload and keep deadlines. Completing tasks with Fingertip is satisfying and easy.

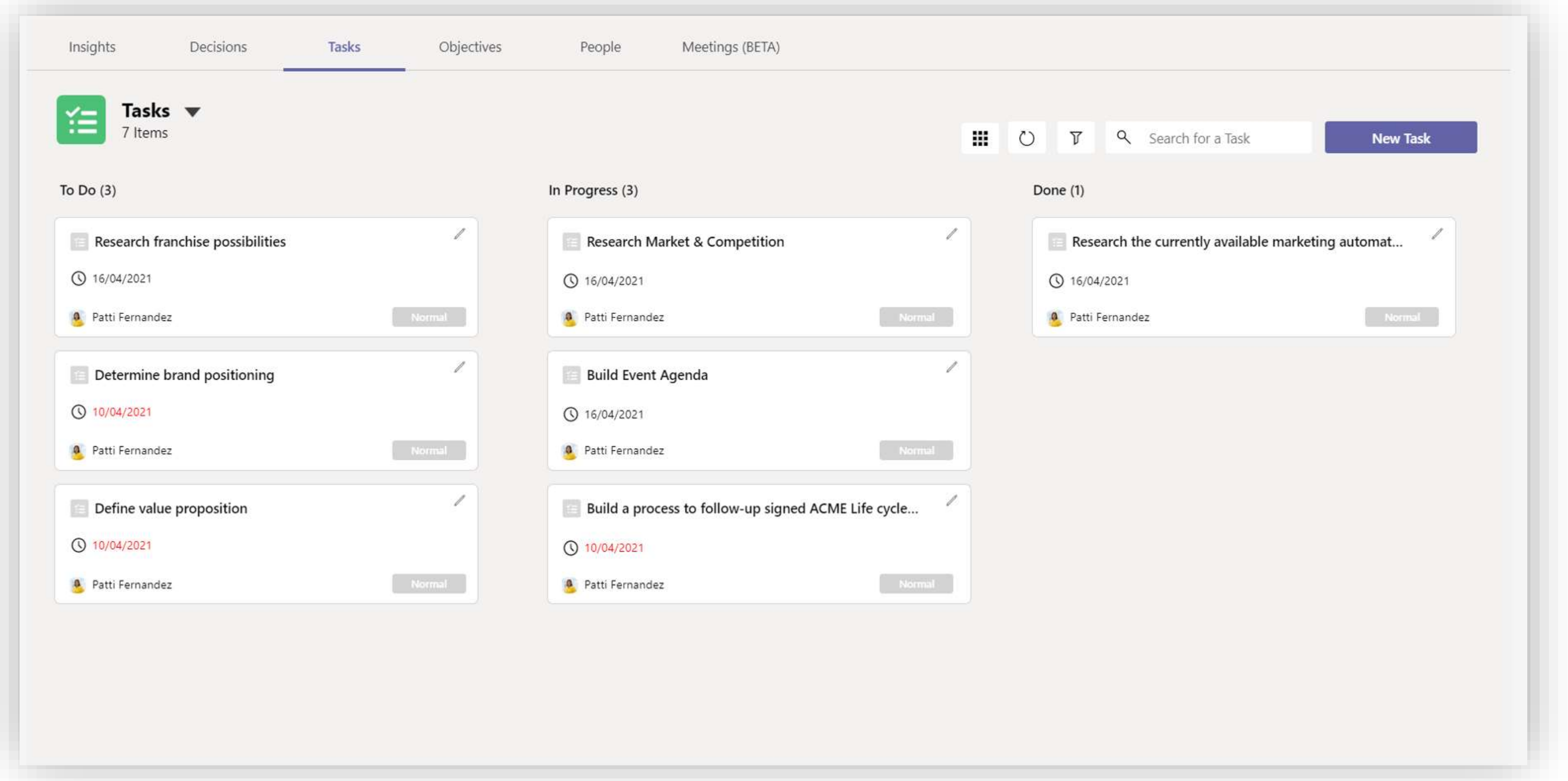
06

Manage your Tasks

Manage tasks in a simple interface.

Set the activity, deadline and responsible person, and you're ready to go.

Watch upcoming and prioritized tasks progress in a virtual Kanban board, and communicate the tasks you complete without interrupting others.



Reduce time spent waiting by being more transparent

Offer everyone a just-in-time look into the whole organization - the decisions and tasks in progress. Improve accountability and alignment with less confusion and duplication of work. Radical transparency makes all data equally available to make everyone feel a trusted, important part of the team.

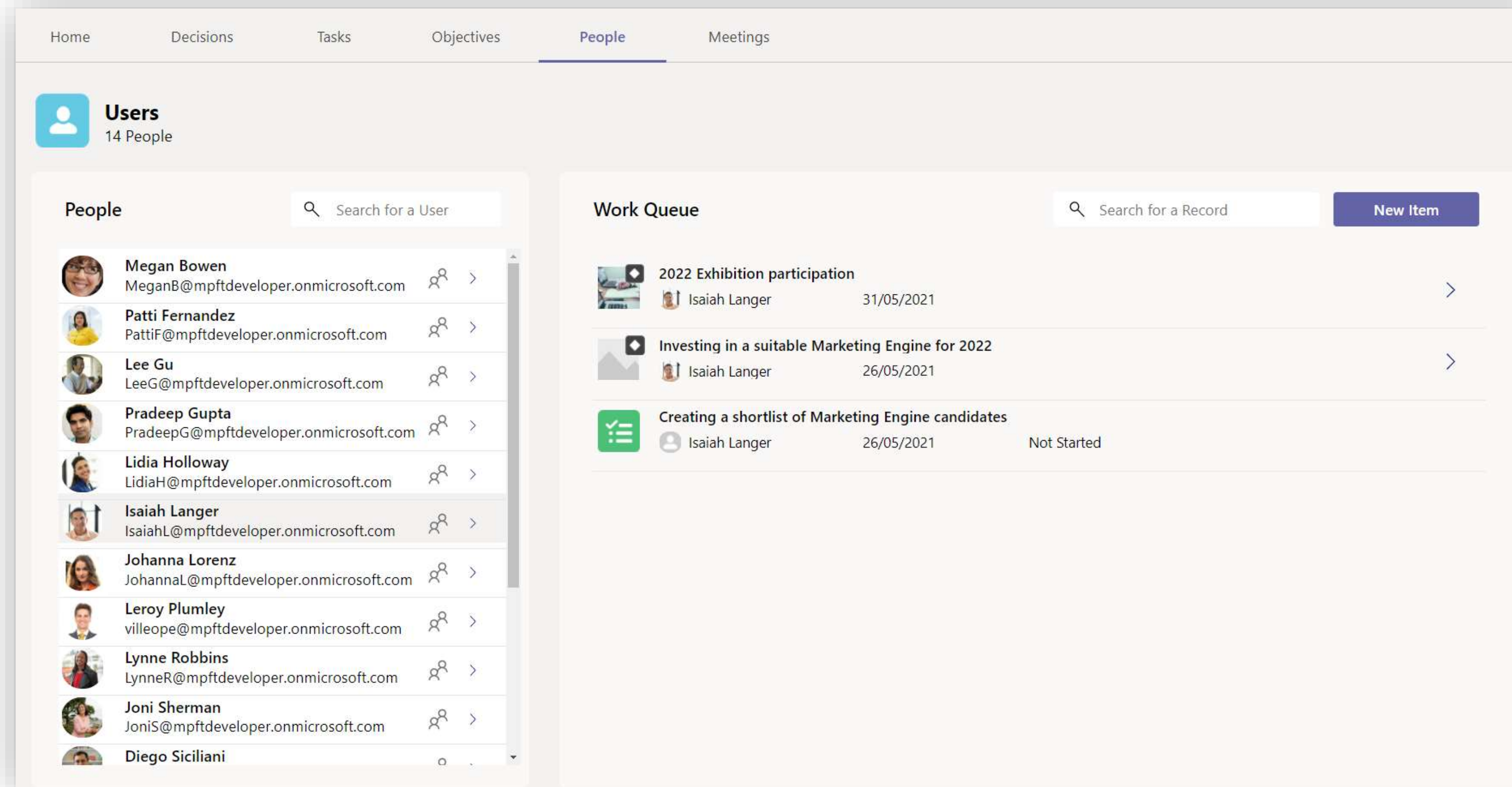
07

See what's happening around you by making the work transparent

Fingertip's personal work queues list the transparent work everyone has on their agenda.

It improves communication and productivity by reducing interruptions and waiting, when the information is available when you need it.

Make note of workloads and assign tasks without creating extra stress.





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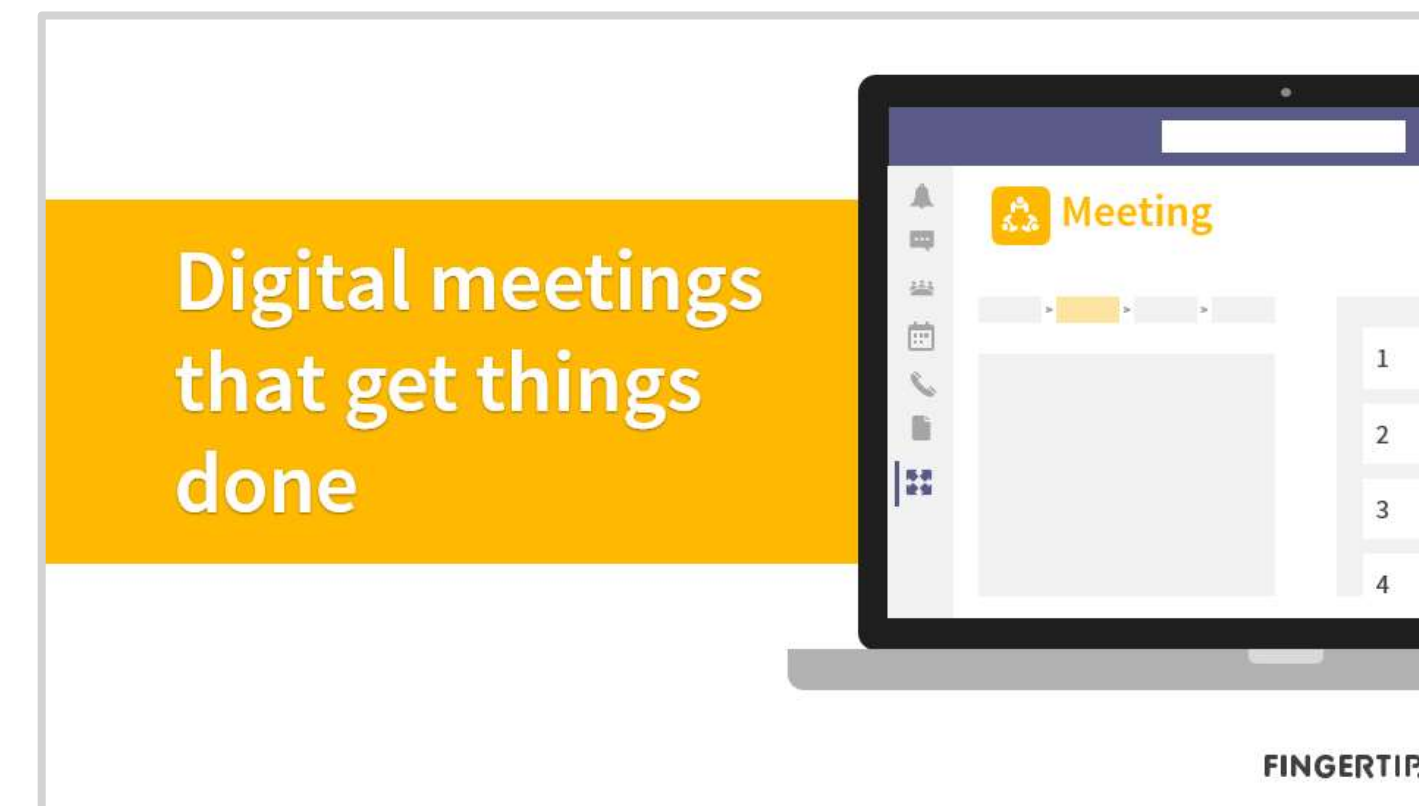
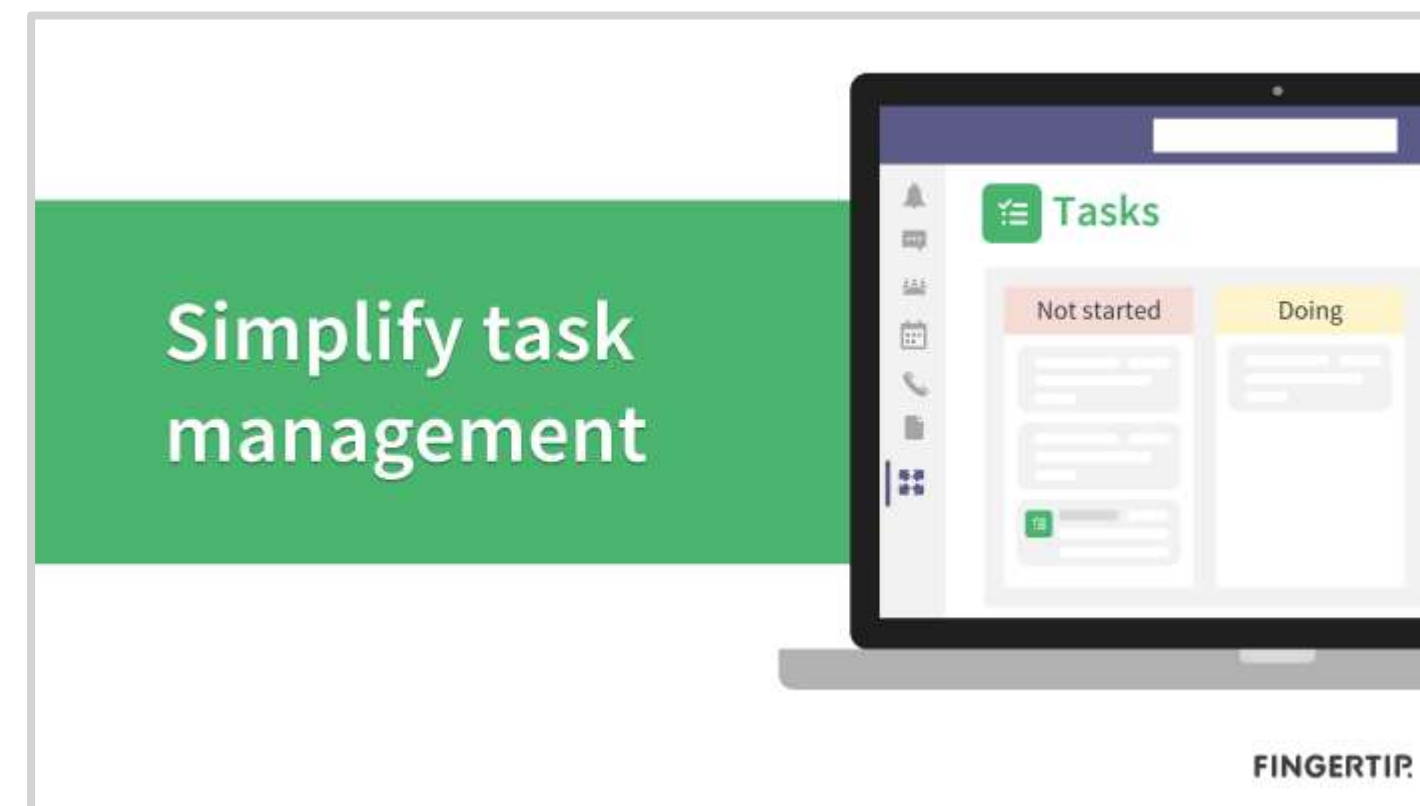
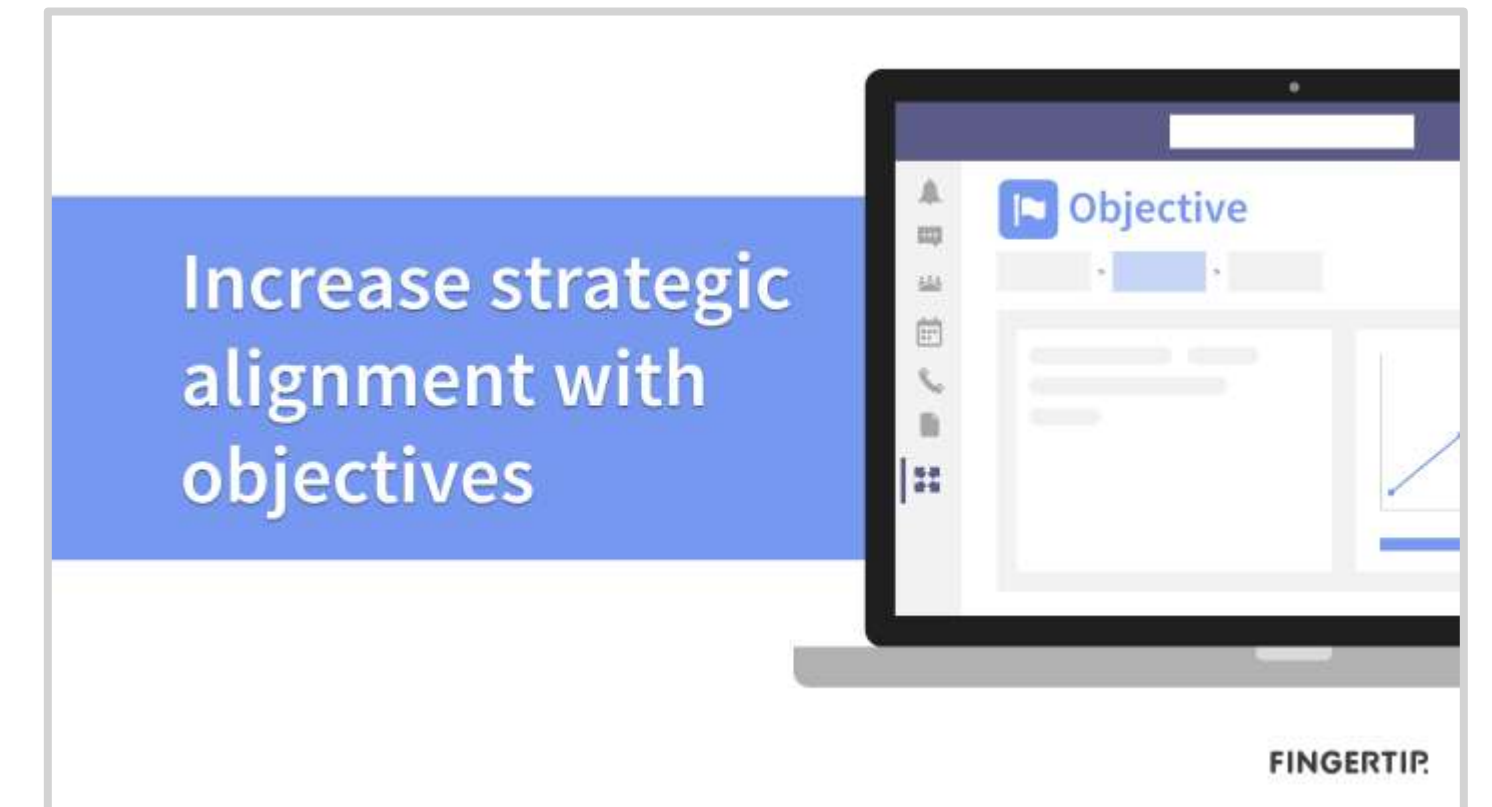
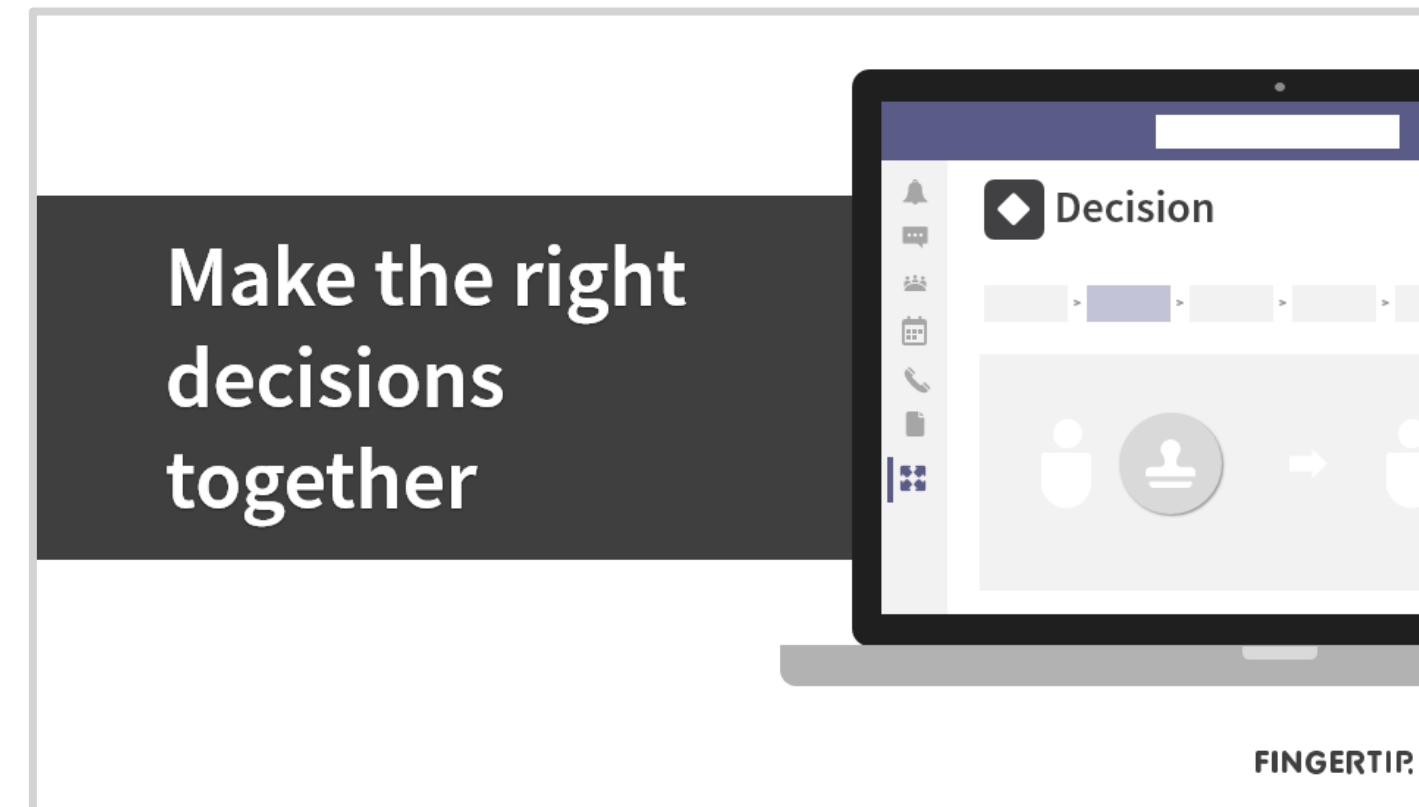
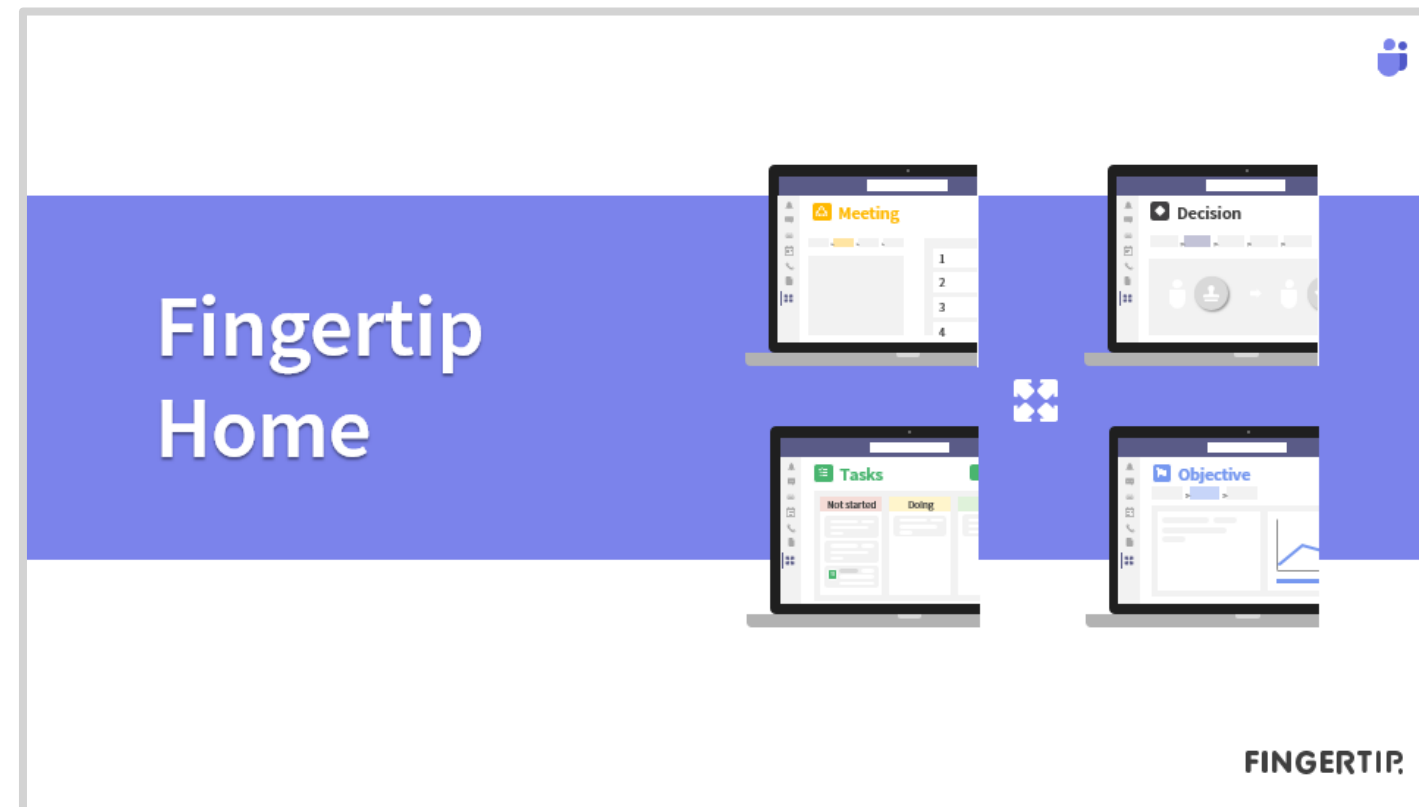
Microsoft Partner

FINGERTIP.

Step-by-step guides for Fingertip Teams

Get familiar with Fingertip functionalities

Table of Contents

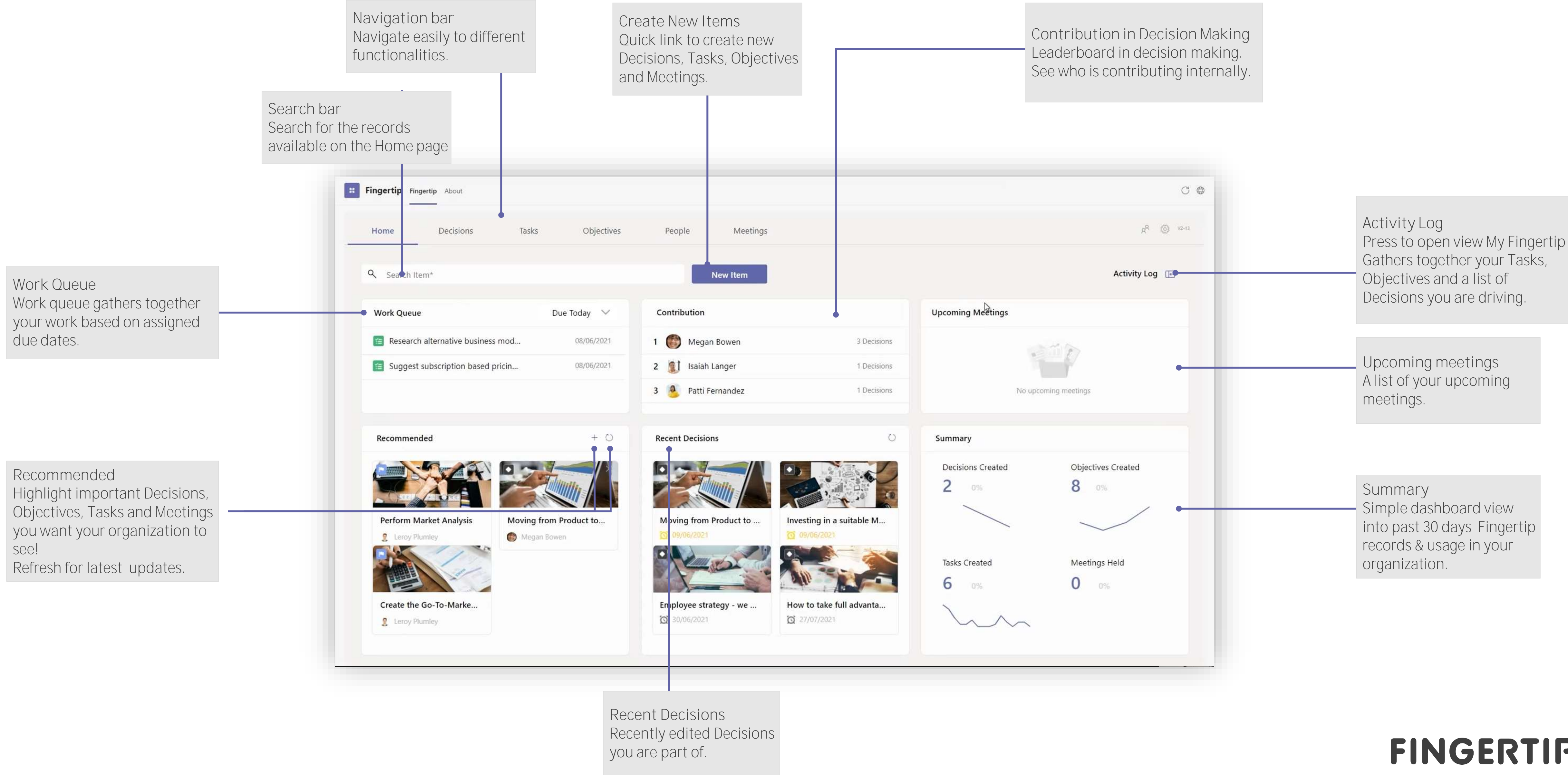




Fingertip Home



Elements of Home page



Elements of Home page

Navigation bar
Navigate easily to different functionalities.

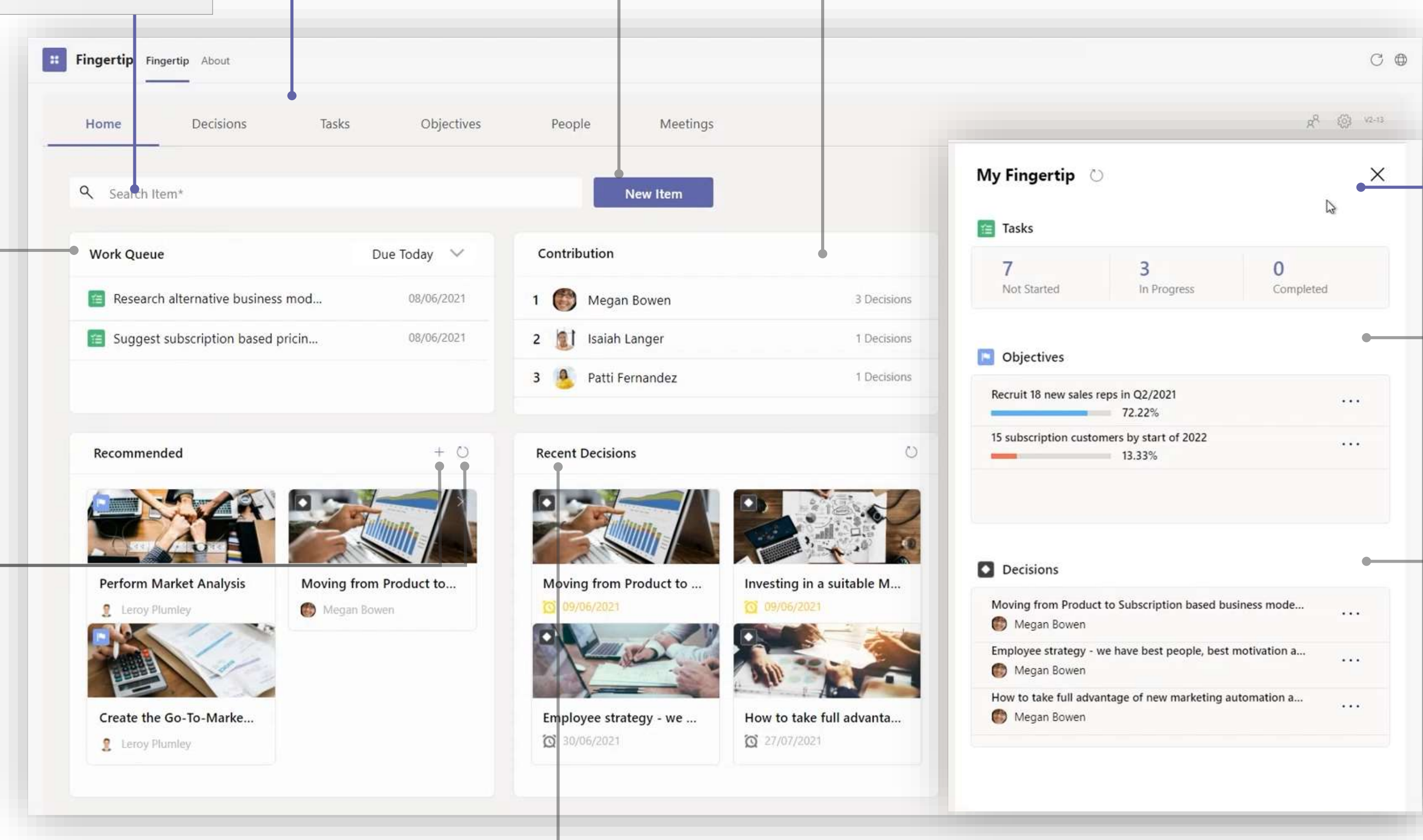
Search bar
Search for the records available on the Home page

Create New Items
Quick link to create new Decisions, Tasks, Objectives and Meetings.

Contribution in Decision Making
Leaderboard in decision making. See who is contributing internally.

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

Recommended
Highlight important Decisions, Objectives, Tasks and Meetings you want your organization to see!
Refresh for latest updates.



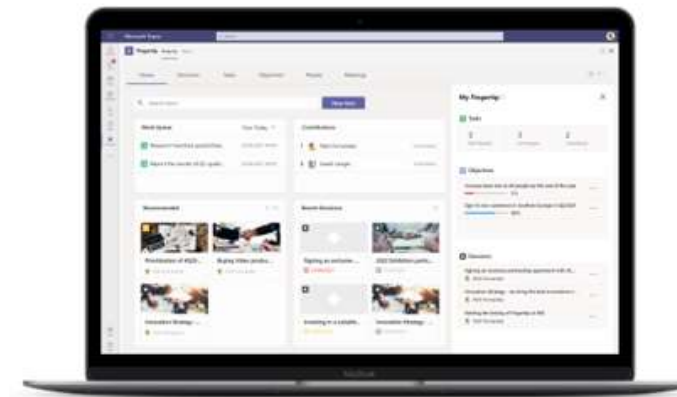
My Fingertip
Gathers together your Tasks, Objectives and a list of Decisions you are driving.

Upcoming meetings
A list of your upcoming meetings.

Summary
Simple dashboard view into past 30 days Fingertip records & usage in your organization.

Recent Decisions
Recently edited Decisions you are part of.

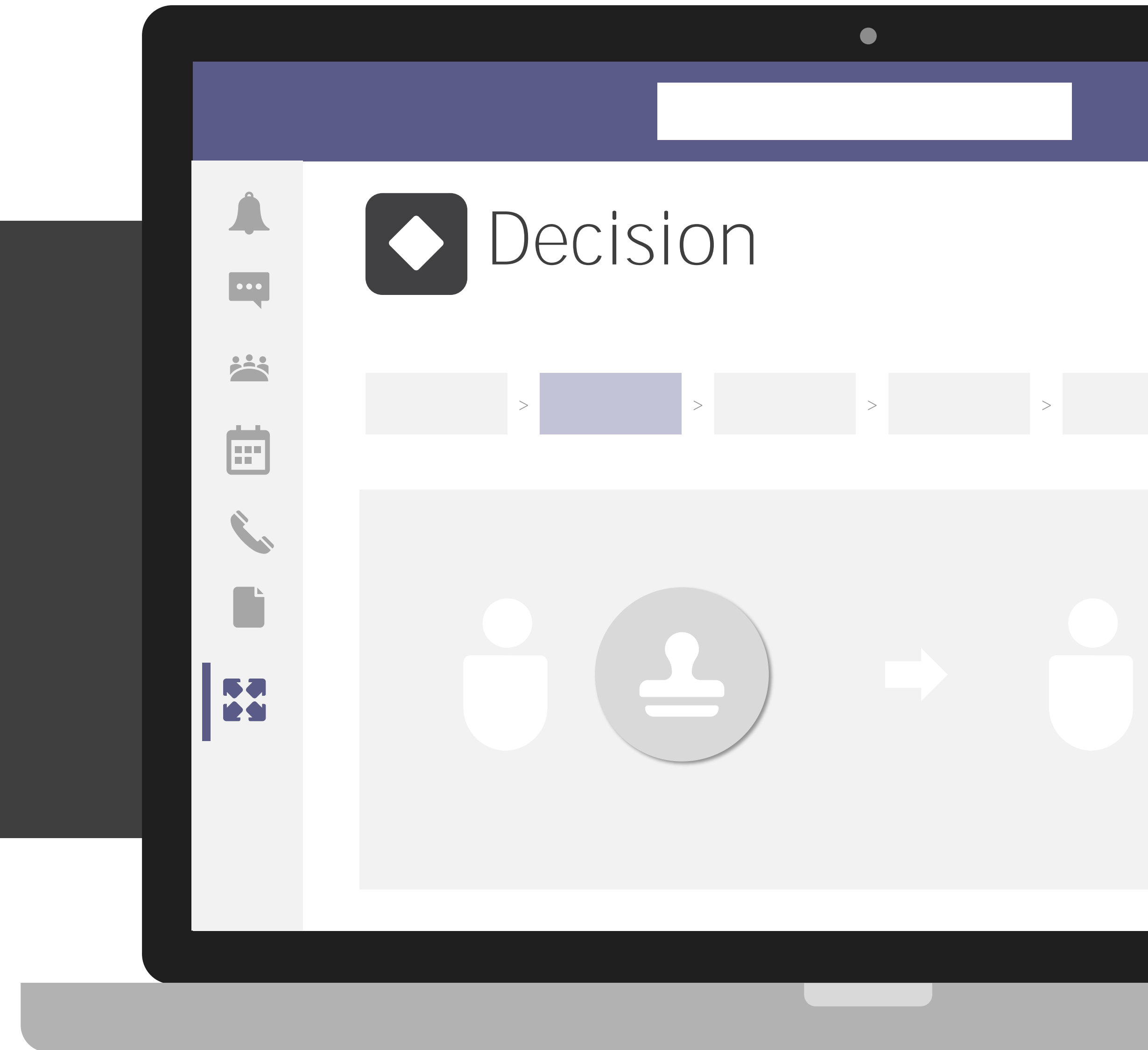
Step-by-Step Guides [HOME PAGE]

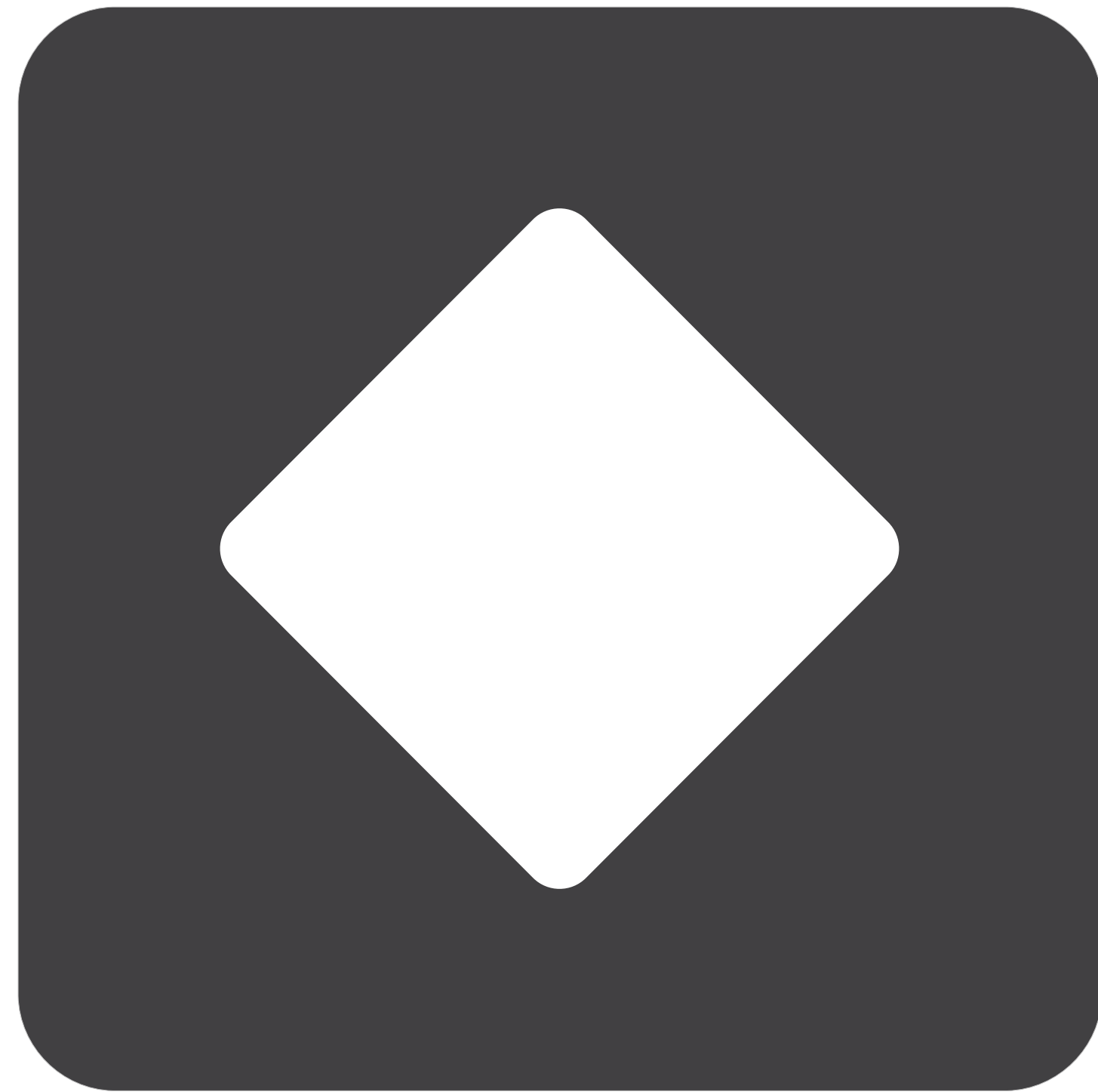


Using the Fingertip
Home Page

FINGERTIP.

Make the right
decisions
together





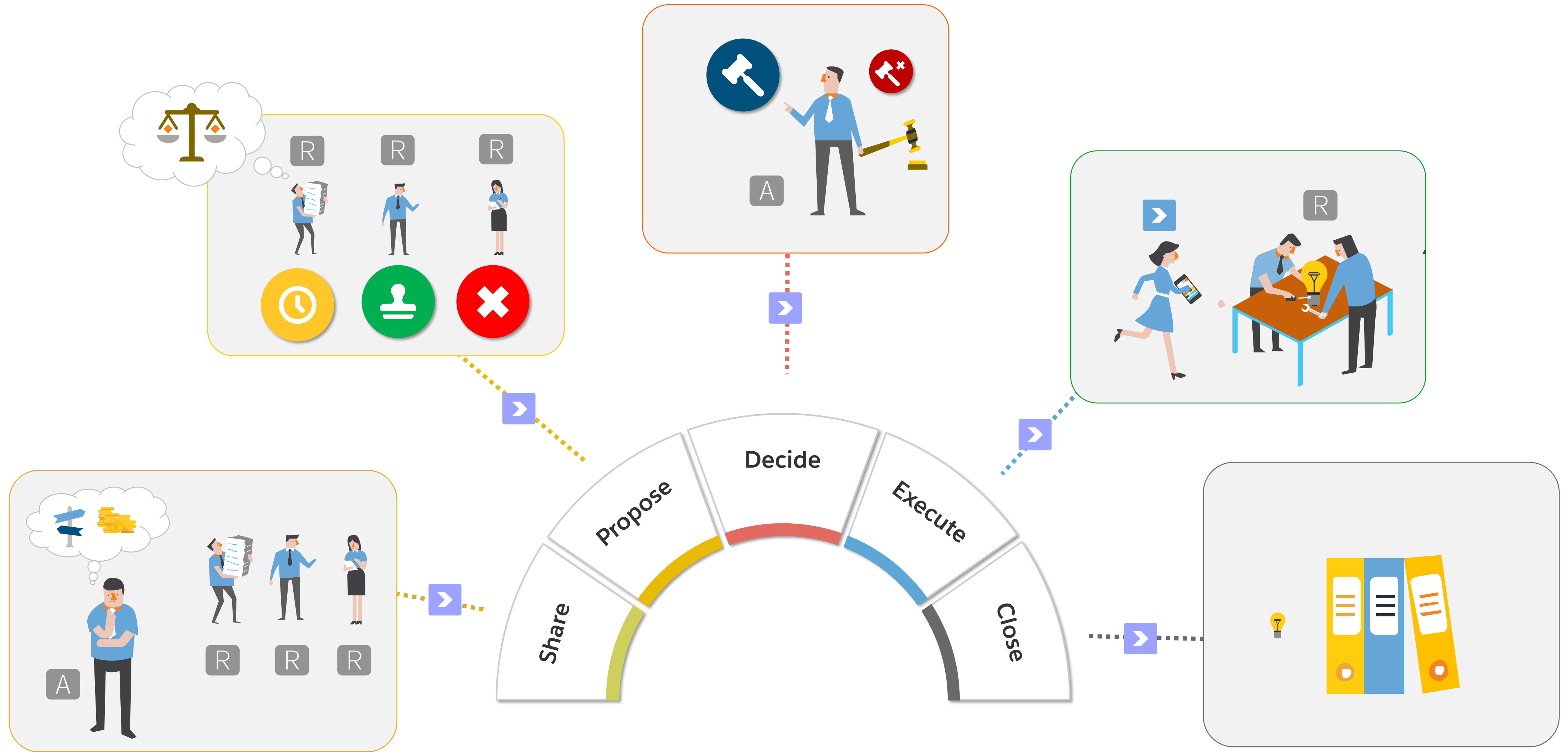
DECISION.

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

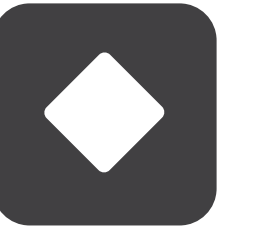


Decision Making Lifecycle





Elements of the Decisions Tab



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

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

Decision Views
Select the different views the decisions to be viewed
1. List
2. Board
3.. Insight

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
Lists the person in Accountable 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.

Visual indicators

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

Progress	Title	My Stance	Status	My Role	Decision	Phase	Due Date	Accountable
	Selecting a partner for retail in Sweden			A	Adele will research alternatives...	Decide	23/06/2021	Megan Bowen
	Moving from Product to Subscription based ...			A	Let's approve the strategy in t...	Propose	09/06/2021	Megan Bowen
	Investing in a suitable Marketing Engine for ...			R		Share	09/06/2021	Isaiah Langer
	Employee strategy - we have best people, be...			A		Share	30/06/2021	Megan Bowen
	How to take full advantage of new marketin...			A		Share	27/07/2021	Megan Bowen
	Signing an exclusive partnership agreement ...			R	We need a reliable and trusted...	Decide	23/06/2021	Patti Fernandez



New Decision popup



Activity

Chat

Teams

Calendar

Calls

Files

Fingertip

...

Apps

Help

Search

Fingertip Fingertip About

Insights

Decisions

Tasks

Objectives

People

Meetings (BETA)

Decisions

3 Items

Progress

Title

...

Selecting the best Marketing Automation

...

Prioritization of 4Q2020 Project Ideas

...

Innovation Strategy - we bring the best

New Decision

Decision details

* Title

Building the gamification solution 2.0 for Sunny Rocks Ltd

Decision

Sunny Rocks are looking to motivate and engage their employees with gamification. We should offer a new and improved gamification module that suits their need perfectly

Due Date

4/29/2021

Accountable

Patti Fernandez

Responsible(s)

Adele Vance X Isaiah Langer X Lidia Holloway X Megan Bowen X

Search user or group...

Create

Search for a Decision

New Decision

Due Date	Accountable	
20/04/2021	Patti Fernandez	>
15/04/2021	Patti Fernandez	>
20/04/2021	Patti Fernandez	>

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

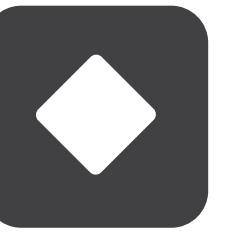
When should the decision be decided upon?
Add the due date/ deadline for the collaboration and stances.

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.



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!

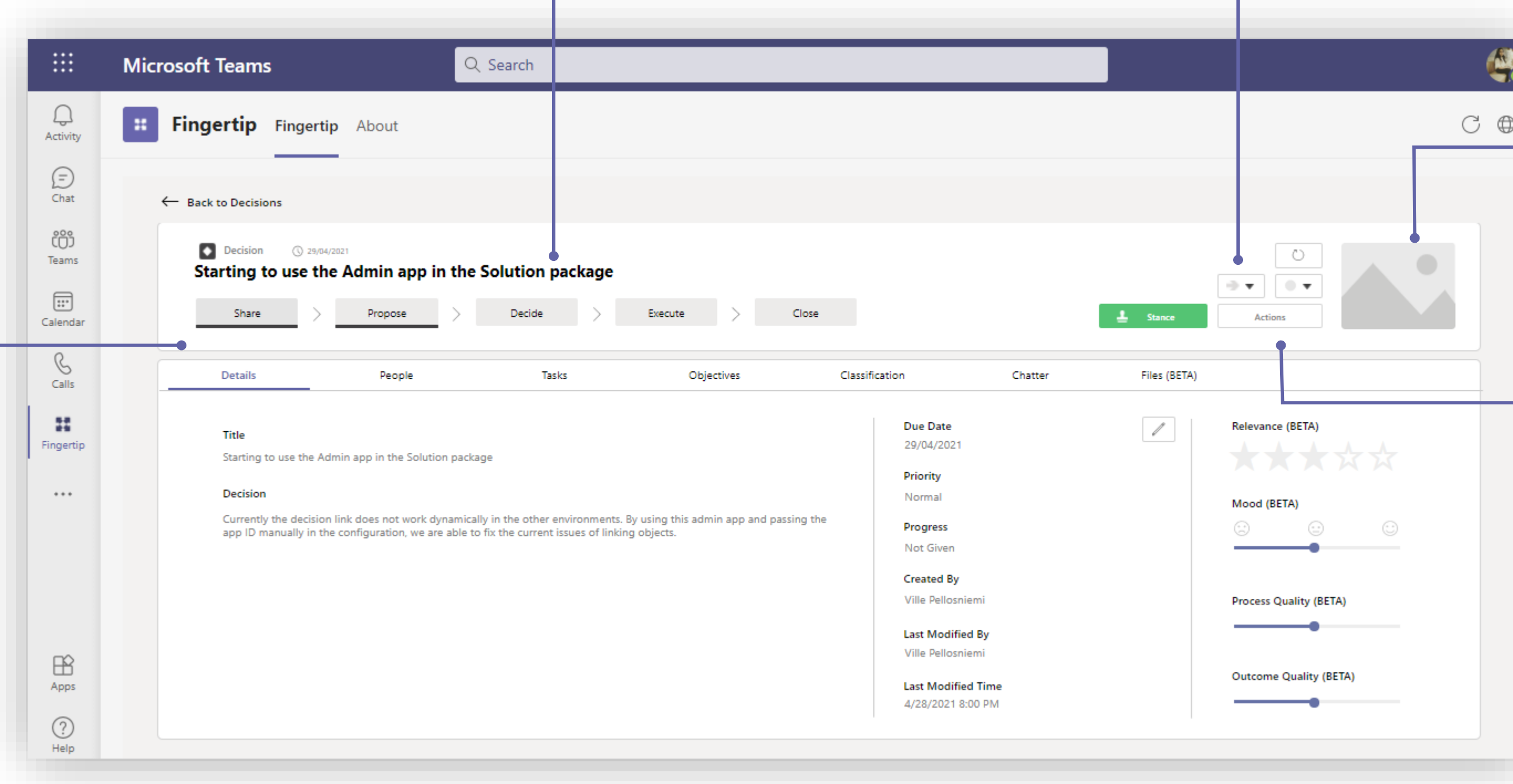
Share: Involve stakeholders & collaborate.
Propose: Gather the Stances
Decide: Make the decision. Decide!
Execute: Complete the required tasks
Close: Close when your decision has been successfully executed

Decision title
Inspiring summary and crystallization of the decision

Trend and Progress indicator
Allows you to set the severity/Importance and progress value of a decision

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



Step-by-step guides [DECISIONS]



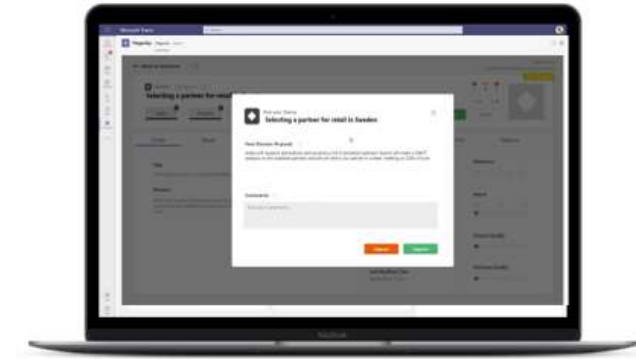
How to create a decision

FINGERTIP.



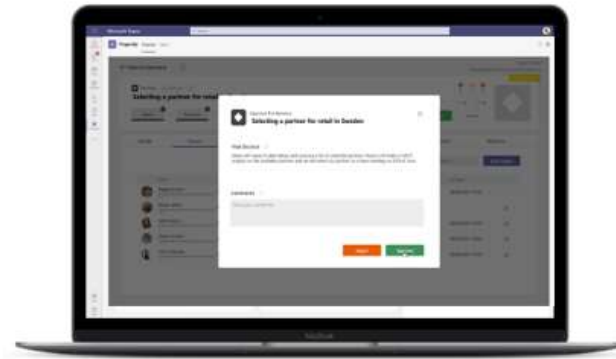
How to propose a decision

FINGERTIP.



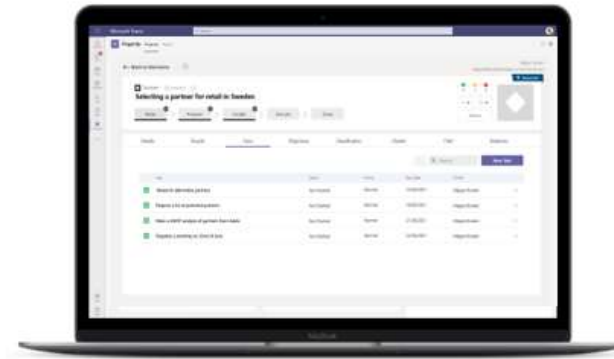
How to give a stance to a decision

FINGERTIP.



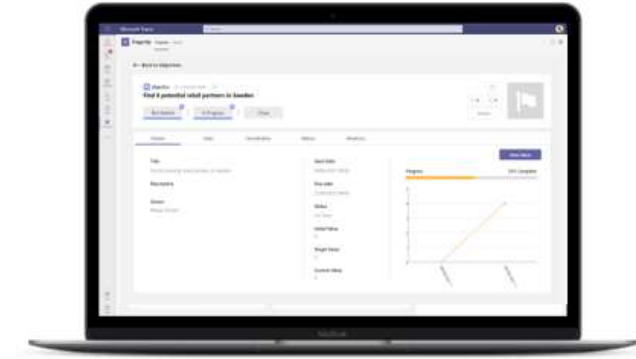
How to approve a decision

FINGERTIP.



How to manage tasks in a decision

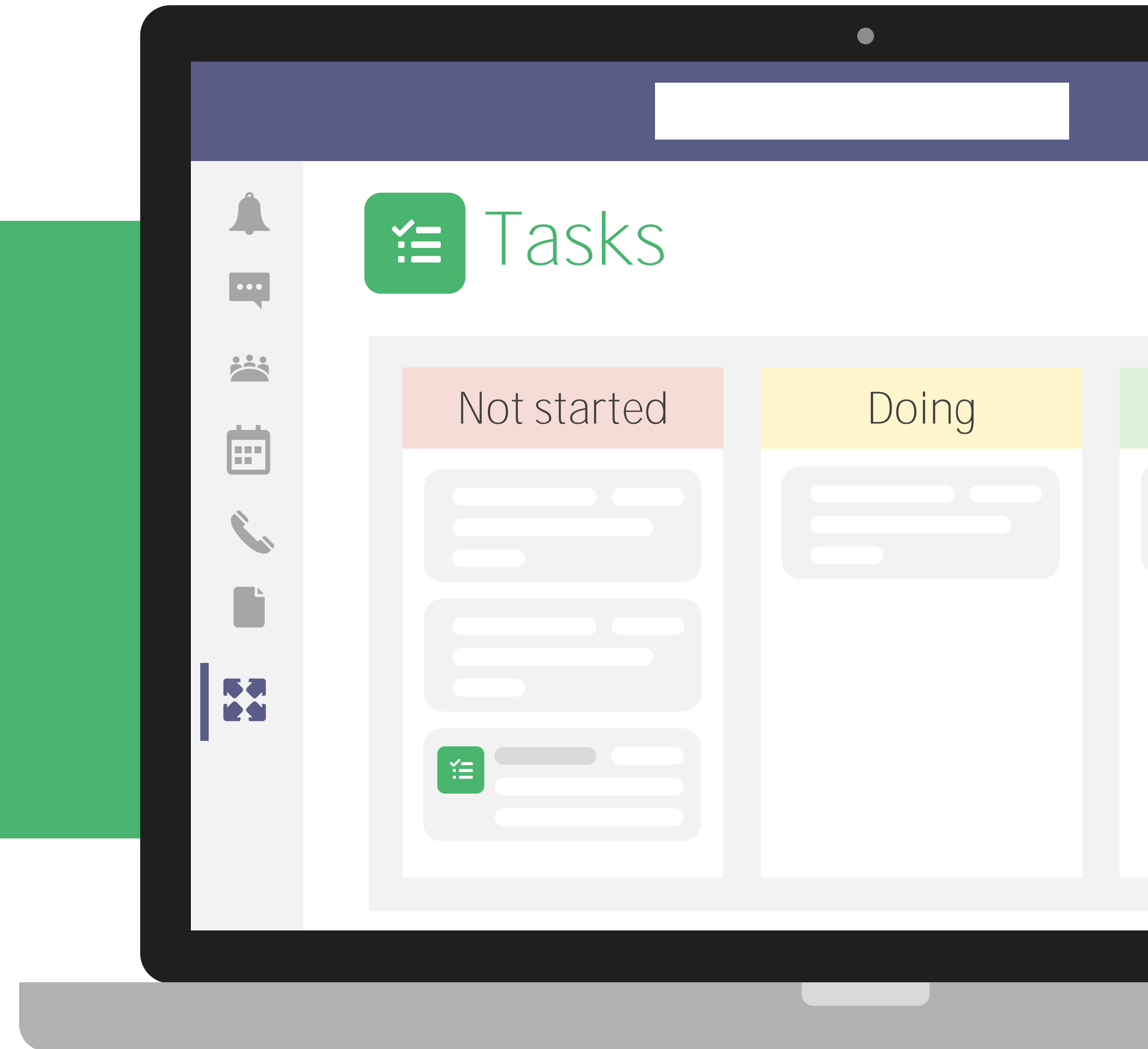
FINGERTIP.



How to manage objectives in a decision

FINGERTIP.

Simplify task management





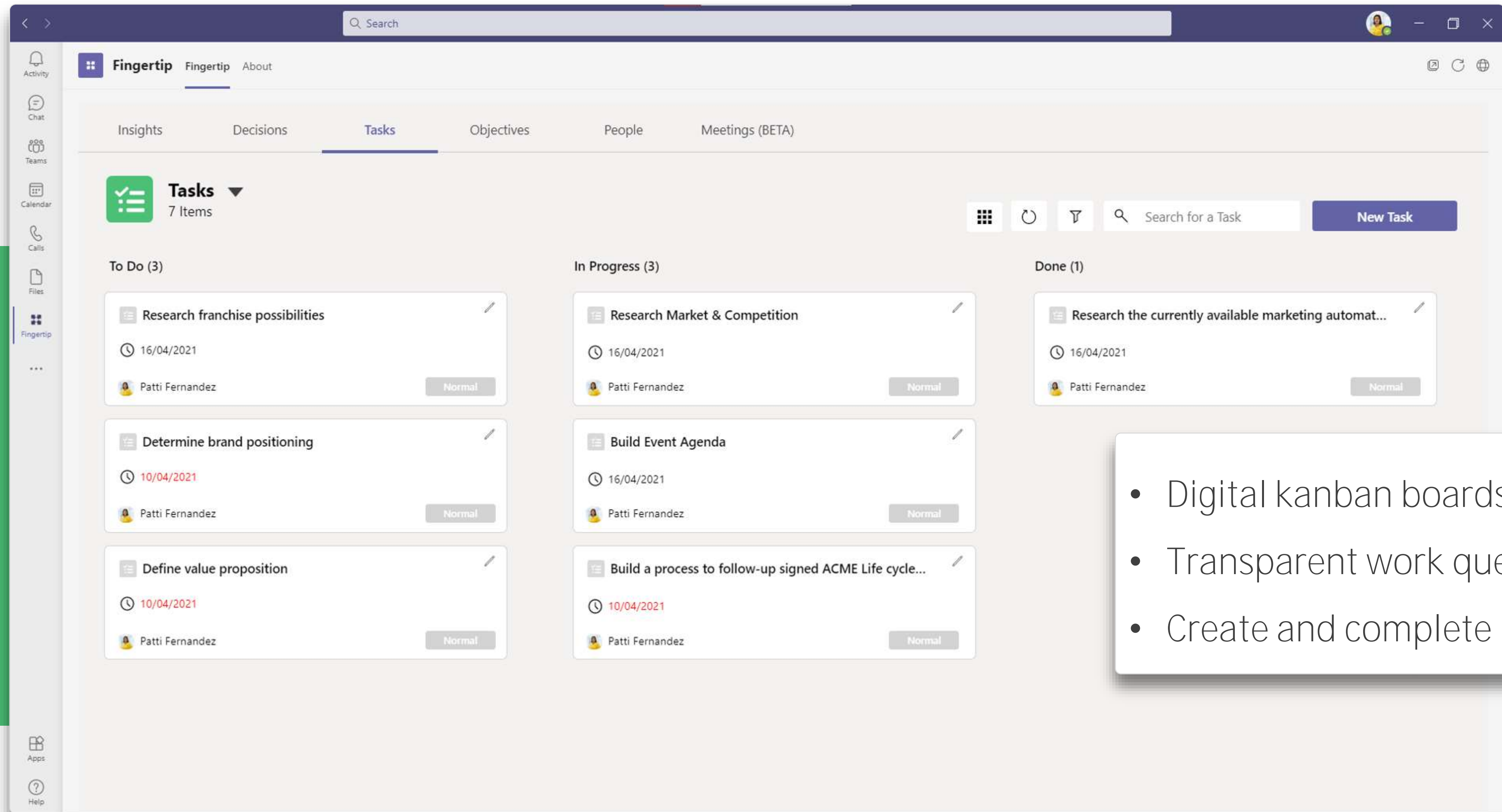
TASK.

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 GANTT chart or Kanban board
- Use progress indicator or priority to flag the most critical tasks

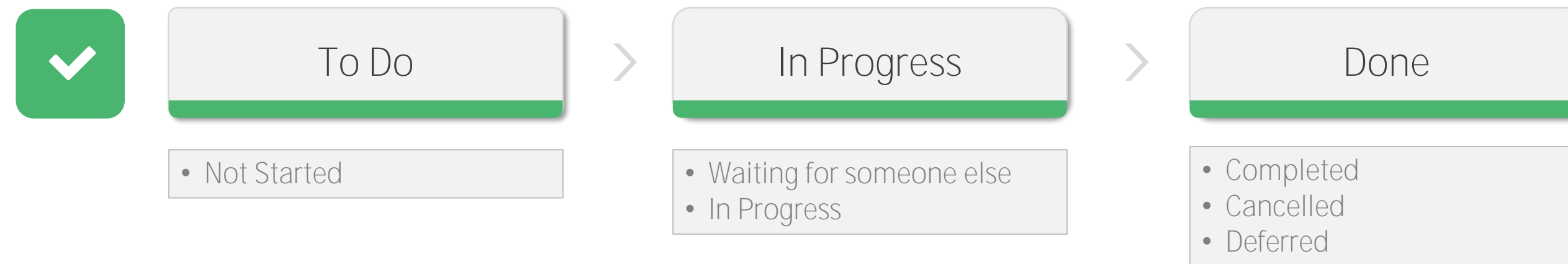


Task management focusing on doing



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

The **Task** undergoes three stages in its life cycle



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!

The screenshot shows the 'Edit Task' dialog box with the title 'Task details'. At the top, there is a progress bar with three stages: 'To Do' (highlighted with a green checkmark), 'In Progress', and 'Done'. Below this, the 'Subject' field contains 'Admin Account for Nisarga'. The 'Priority' dropdown is set to 'Normal'. The 'Status' section shows a list of options: 'Not Started' (selected and highlighted in blue), 'In Progress', 'Waiting on someone else', 'Completed', 'Canceled', and 'Deferred'. A blue bracket on the left side of the dialog box points to the 'Status' section.



Elements of the Tasks tab



Total amount of Tasks
This field shows total number of Tasks

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

Refresh the list
Let's you update the Page with the latest records created and data updated

Organize the task
Filter the task based on Priority, User, due date and Status

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

Find the task
This field allows you to search for the task records

Activate Windows
Go to Settings to activate Windows.

Search

Activity Chat Teams Calendar Calls Files FT - Quality Fingertip Apps Help

Fingertip Fingertip About

Home Decisions **Tasks** Objectives People Meetings

Tasks 2 Items

Search for a Task **New Task**

Progress	Subject	Staus	Priority	Due Date	Owner
	Admin Account for Nisarga	Not Started	Normal	5/6/2021 12:00 AM	Nisarga Gowda
	Task tab Fixed	Not Started	High	5/6/2021 12:00 AM	Nisarga Gowda



Elements of the *New task* popup



Highlight the Task's urgency and impact.
The higher the priority, the higher it will appear on lists. Priority will also be shown on the Task card.

Task Title
(required) Enter the Name for your Task.

Indicates the progress of the Task.
The status indicates what is the situation of the task

When does this Task need to be completed?
Select the due date for the Task's completion.

Assigned to
Who is the Task assigned to?

Find the details
Type the description of the task in the description field

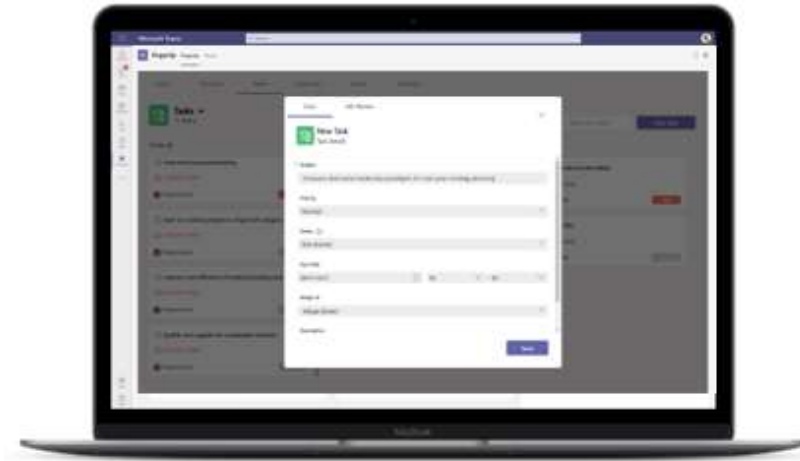
The screenshot shows the Fingertip application interface. A 'New Task' popup is open, displaying the following fields:

- Subject:** Create an implementation plan for the new marketing automation platform
- Priority:** High
- Status:** Not Started
- Due Date:** 4/16/2021
- Assign to:** Patti Fernandez
- Description:** (empty field)

The background shows a list of tasks with the following details:

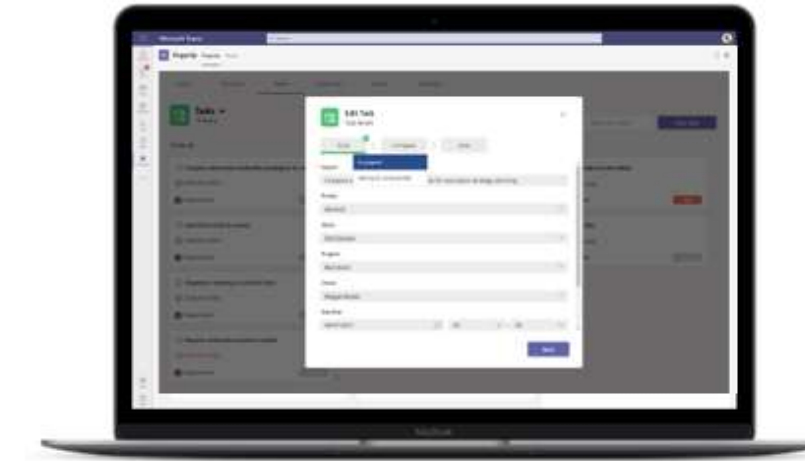
Task Title	Due Date	Assignee
Research franchise possibilities	16/04/2021	Patti Fernandez
Determine brand positioning	10/04/2021	Patti Fernandez
Define value proposition	10/04/2021	Patti Fernandez

Step-by-step guides [TASKS]



How to create
a task

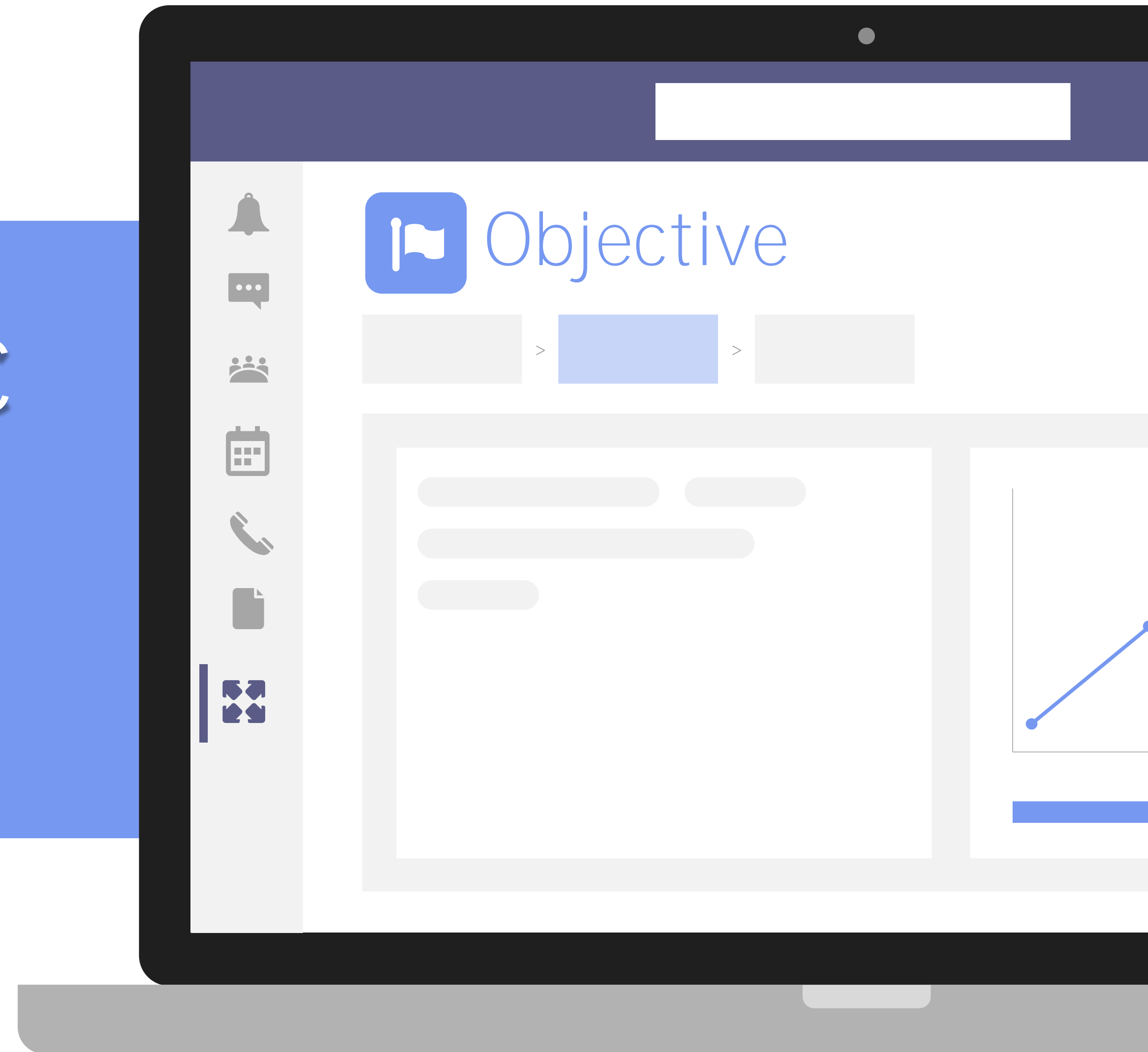
FINGERTIP.



How to update
a task

FINGERTIP.

Increase strategic
alignment with
objectives



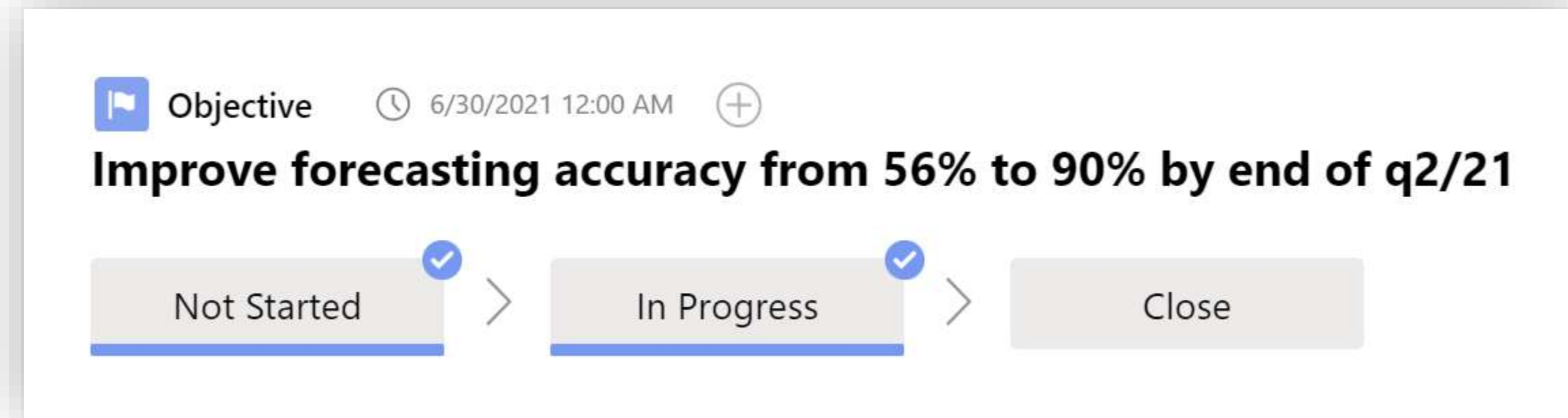


OBJECTIVE.

Ensure focus and alignment with Fingertip Objective

- With Objectives you can create a visual list of items which you can prioritize, categorize and discuss. Fingertip objectives are numeric, measurable and inspirational goals with high ambitions.
- Tie decision making and strategic planning with accountable execution.
- A comprehensive, holistic system for managing objectives and linking them to daily operations.
- Boost motivation and engagement in employees and increase organizational performance.

Objective Life Cycle



1. Not Started : Initial writing of personal objectives
2. In Progress : Objective being measured. Can be marked *On Track*, *Behind*, *Aligned* or *Critical*.
3. Close : After the follow-up period and evaluation the Objective can be closed. Defined as *Completed*, *Postponed*, *Cancelled* or *Not Completed* upon closing.

Completed

Postponed

Cancelled

Not Completed



Elements of the Objective Tab



Record Count
This field shows total number of object record in which your part of

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

Update the objective
Refresh button let's you update the Page with the latest records created and data updated

Organize objective records
Filter the objective based on Priority, User and, Status

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

Find Objectives
This field allows you to search the objective record

Activity

Chat

Teams

Calendar

Calls

Files

Fingertip

...

Apps

Help

Fingertip

Fingertip

About

Insights

Decisions

Tasks

Objectives

People

Meetings (BETA)

Objectives

5 Items

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Search for a Objective

New Objective

Title	Progress	Status	Priority	Due Date	Owner
Create the Go-To-Market (GTM) Strategy Plan	<div><div></div></div> 80%	Not Started	Normal	4/15/2021 12:00 AM	Megan Bowen >
Perform market analysis	<div><div></div></div> 25%	On Track	Normal	4/15/2021 12:00 AM	Megan Bowen >
Create the go-to-market strategy plan	<div><div></div></div> 0%	Not Started	Normal	4/10/2021 12:00 AM	Patti Fernandez >
Perform market analysis	<div><div></div></div> 100%	Completed	Normal	4/10/2021 12:00 AM	Patti Fernandez >
Number of ACME Life Cycle service agreements	<div><div></div></div> 50%	Aligned	Normal	4/10/2021 12:00 AM	Patti Fernandez >



New Objective popup



Create smart title
For best results try to
write specific, measurable,
achievable, realistic and
time-bound Objectives

Set the situation of the Objective
On each phase there are different status
the Objective can have. For example, if
you are behind on your schedule, you
can mark the Objective as Behind or
Critical.

highlight the Objective's urgency
and impact.
The higher the priority, the higher it
will appear on lists. Priority will also
be shown on the Objective card.

When do you start measuring
this Objective? Enter the start
date for this objective.

When does this Objective need to
be complete? Enter the due date for
the Objective's completion and the
target date for reaching the target
value.

New Objective
Objective details

* Title
Q2 2021: Sales Revenue increases 7% from previous year to 550 000 €

Objective Status
On Track

Priority
Very High

Start Date
4/1/2021

* Due Date
6/30/2021

* Initial Value * Target Value * Current Value

Create



The Objective record page insights



Process Phase
Objective life cycle has 3 phase
1. Not started (Default phase selected when the Object is created)
2. InProgress (Aligned, On track ,Behind, Critical)
3. Close(Completed, Postponed, Cancelled , Not completed)
You can move the Objective phase as and when required considering the readiness.

Objective Title
explains the objective in nutshell

Modify Objective information
Pencil icon for editing the objective details

Update the recent changes
Refresh button refreshes the page and updates the latest data

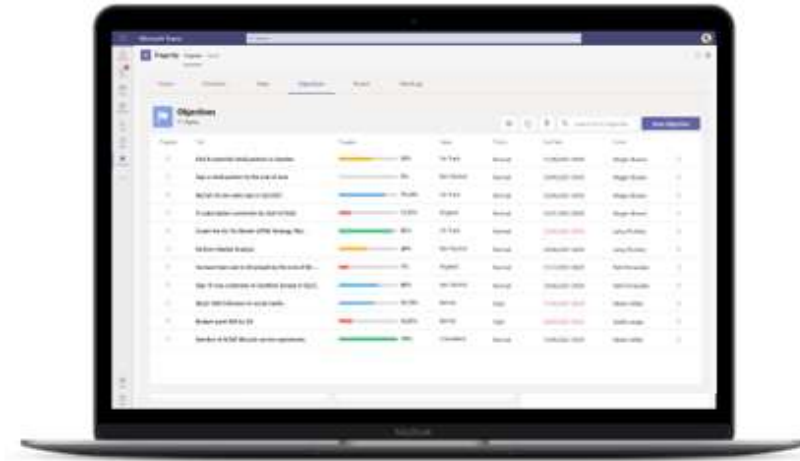
Display Image
When you click on it a popup will open where you can select the image and upload decoration image to a decision

Manage your Object
Action menu provides list of option such as New Value , New task, Edit details, Delete . for performing the actions inside objective record

Update Latest Value
New value - You can update the current value from new value button.

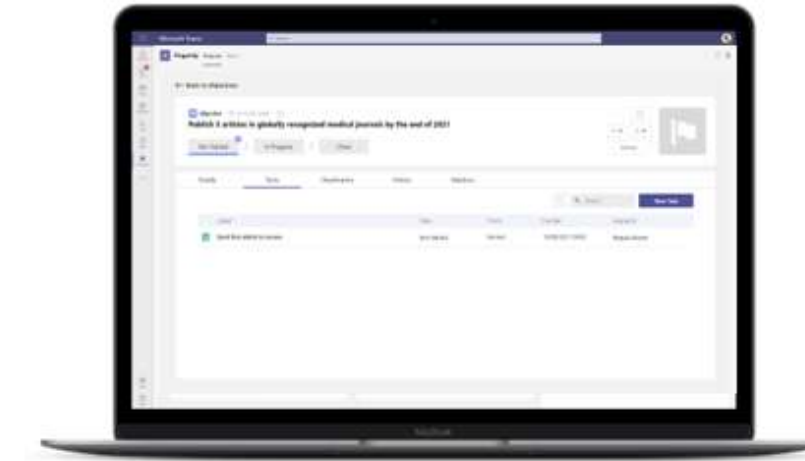
The screenshot shows the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below it, a sidebar contains icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area displays an objective record for 'Create the Go-To-Market (GTM) Strategy Plan'. The objective is currently in the 'Not Started' phase, with buttons for 'Not Started', 'In Progress', and 'Close'. A timeline shows the objective was created on 4/14/2021 at 11:44 AM. The 'Details' tab is active, showing fields for Title, Description, Owner (Megan Bowen), Start Date (4/14/2021 12:00 AM), Due date (4/15/2021 12:00 AM), Status (Not Started), Initial Value (0), Target Value (100), and Current Value (80). A progress bar indicates '80% Complete'. A line graph shows the progress over time, with data points for 4/14/2021 11:44 AM and 4/16/2021 11:44 AM. An 'Actions' menu is visible, containing options like 'New Value', 'New task', 'Edit details', and 'Delete'.

Step-by-step guides [OBJECTIVES]



How to create
an objective

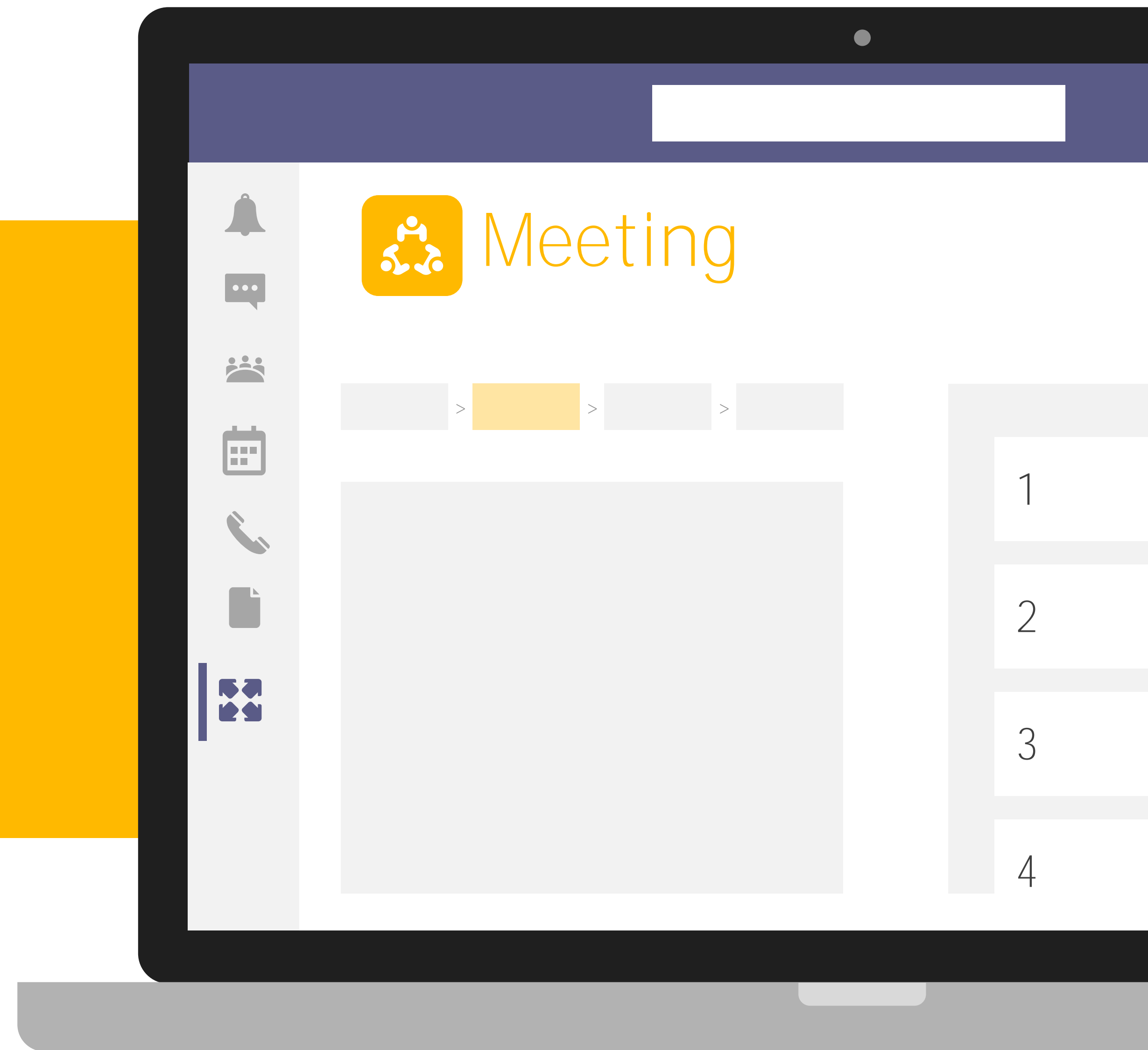
FINGERTIP.



How to manage tasks
in an objective

FINGERTIP.

Digital meetings
that get things
done





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

The screenshot displays the Fingertip web application interface. At the top, there's a navigation bar with a search bar and user profile. The left sidebar contains icons for Activity, Chat, Teams, Calendar, Calls, Files, and Fingertip. The main content area is divided into two sections. The left section shows a meeting titled "Leadership Team meeting 05/2021" with a "Join" button and a progress bar with stages: Preparation (highlighted), Meeting, Follow-up, and Closing. Below this is a "Details" tab with a "Title" field and a "Modified By" field showing "Patti Fernandez". The right section is titled "Agenda" and features an "Add Item" button. It lists five agenda items with their durations and descriptions, connected by downward arrows: 1. Greetings and agenda approval (10 min) by Patti Fernandez; 2. Strategy followup: Innovation Strategy by Isaiah (15 min) by Isaiah Langer, with a sub-item "Innovation Strategy - we bring the best innovations to solve customers' business challenges"; 3. Deciding: Marketing Automation Platform (20 min) by Megan Bowen, with a sub-item "Selecting the best Marketing Automation Platform"; 4. Sales reporting: Life Cycle services (10 min) by Adele Vance, with a sub-item "Number of ACME Life Cycle service agreements"; and 5. Topics outside of agenda (15 min).



Elements of the Meeting tab

Total Meetings
Shows total number of meetings created

Update
let's you update the Page with the latest records created and data updated

Schedule a 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.

Find Meeting
Search Field allows you to search for the Meeting record using keyword.

Progress	Title	Phase	Start Time	Duration	Organizer
●	Leadership meeting 04/2021	Preparation	4/15/2021 12:00 PM	2h	Patti Fernandez >
●	Leadership Team meeting 05/2021	Preparation	4/20/2021 10:00 AM	2h	Patti Fernandez >

New Meeting Popup

Frame Meeting subject
Subject of the meeting,
good to include
numbering as well.

Fix the meeting timing
Set the date and time for
the meeting.

Invite people
Add the attendees who
are invited to
participate.

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

Find your Time zone
Select the time zone based on
where you are conducting the
meeting.

Schedule the meeting
When ready click Create.

The screenshot shows the Fingertip application interface with a 'New Meeting' popup form open. The form is titled 'New Meeting' and 'Meeting details'. It contains the following fields and controls:

- Subject:** A text input field with the placeholder 'Enter a Subject for the Meeting'.
- Description:** A larger text input field with the placeholder 'Enter a description for your meeting'.
- Timezone:** A dropdown menu currently showing 'FLE Standard Time'.
- Start Time:** A date and time selector showing '5/21/2021' at '00:00'.
- End Time:** A date and time selector showing '5/21/2021' at '00:00'.
- Attendees:** A search input field with the placeholder 'Search for a user or team'.
- Create:** A button at the bottom right of the form.

The background shows the Fingertip application with a sidebar containing icons for Activity, Chat, Teams, Calendar, Calls, Files, and a 'Fingertip' section with a 'FT - Quality' item. The main content area has tabs for Home, Decisions, Tasks, Objectives, People, and Meetings. The 'Meetings' tab is active, showing a 'Meetings' section with '0 Items'.



The Meeting Record page insights



Meeting details
Summarizes the meeting
details in one view.

Last modified username
Shows who made the last
changes to the meeting .

Meeting 4/20/2021 10:00 AM - 4/20/2021 12:00 PM [Join](#)

Leadership Team meeting 05/2021

Preparation > Meeting > Follow-up > Closing

Details People Notes

Title
Leadership Team meeting 05/2021

Description
Going through monthly progress and deciding on strategic initiatives

Start Time 4/20/2021 10:00 AM **End Time** 4/20/2021 12:00 PM

Created By Patti Fernandez **Created On** 4/15/2021 1:35 PM

Modified By Patti Fernandez **Modified On** 4/15/2021 1:35 PM

Agenda [Add Item](#)

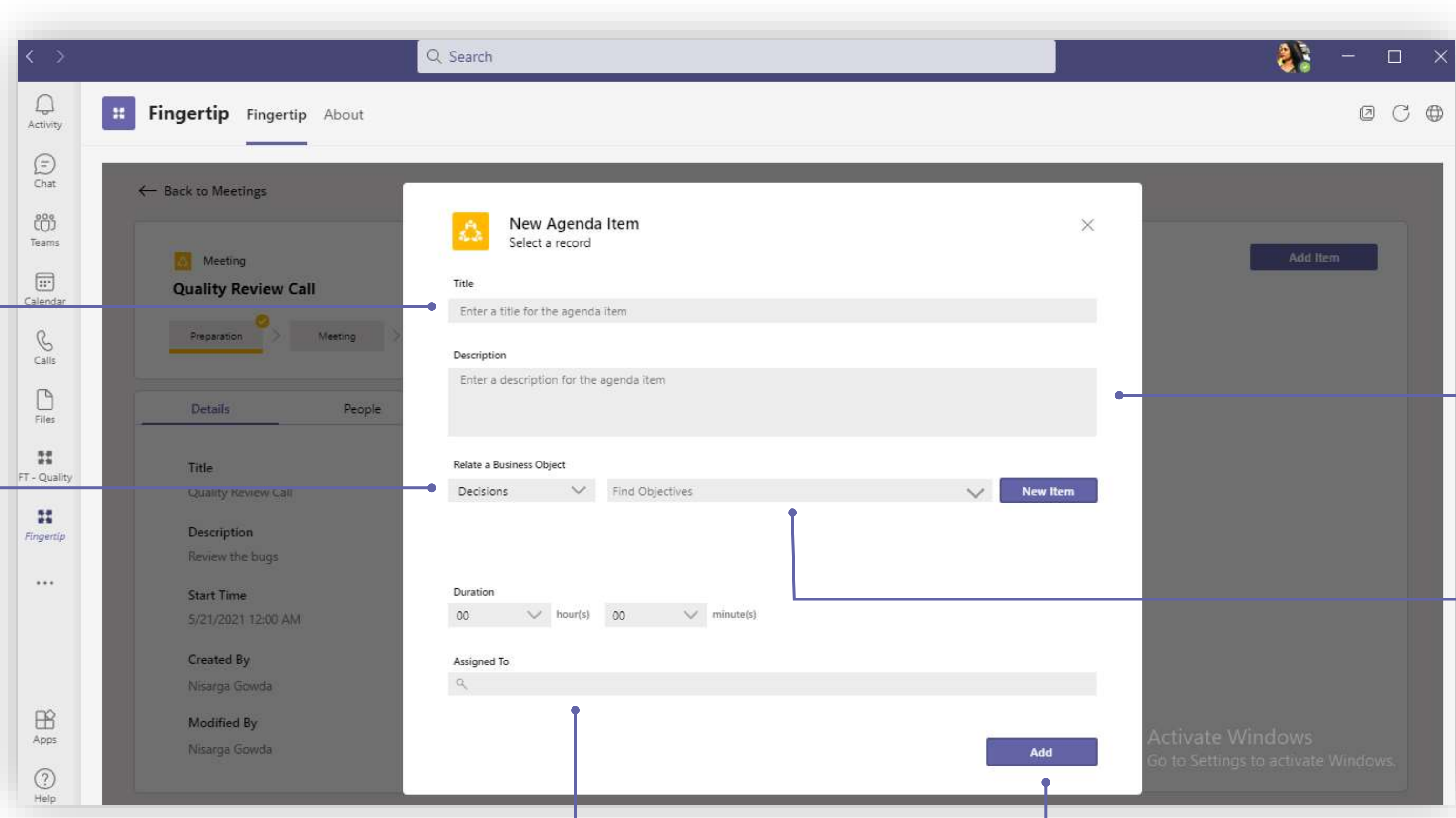
- 1 Greetings and agenda approval** 10 min
No description
Patti Fernandez
- 1 Strategy followup: Innovation Strategy by Isaiah** 15 min
Looking at the progress with strategic Initiatives related to our innovation strategy in Q1.
Isaiah Langer
Innovation Strategy - we bring the best innovations to solve customers' business challenges
- 1 Deciding: Marketing Automation Platform** 20 min
Megan presents alternatives her team has found for a marketing platform, and we decide which to invest in.
Megan Bowen
Selecting the best Marketing Automation Platform
- 1 Sales reporting: Life Cycle services** 10 min
Adele presents how we've grown our customer base in Life Cycle services.
Adele Vance
Number of ACME Life Cycle service agreements
- 1 Topics outside of agenda** 15 min
Time reserved for open topics

Create the Agenda by adding
items to the agenda list
You can add ready records from
Fingertip, URLs, files, or create new
Items. Also assign the agenda item
to a specific person and provided
time used on the item in the
meeting.

Reorder the Meeting Agenda
Click on upward arrow to move
your agenda item upward And Click
on downward arrow to move your
agenda item downward.

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

New Agenda Popup



Add a new agenda item to the meeting
What is the topic?

Record type
You can select which record you want to add on the agenda.

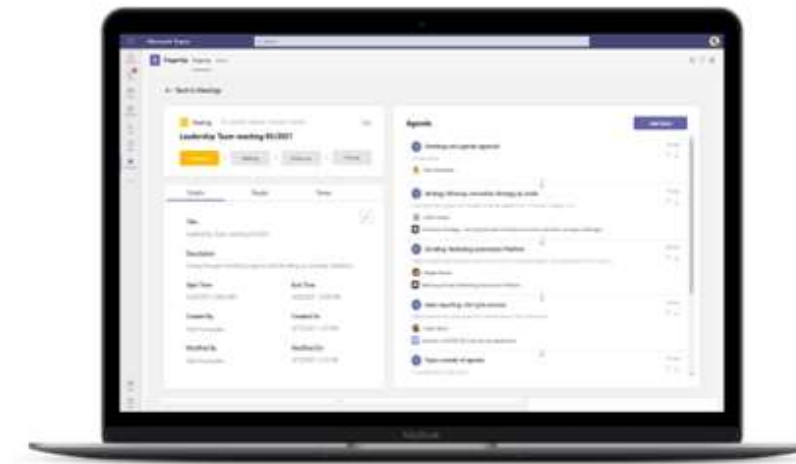
Brief your agenda.
Give little more insight of the topic to your colleagues

Find the records
Search for the agenda item in Fingertip to add to the meeting or create a new item.

Assign to the right person
Who is responsible for presenting the added item?
Assign to the right person and use the duration to estimate how long the topic can be discussed.

Save your agenda
By clicking on add you can add this item to the meeting

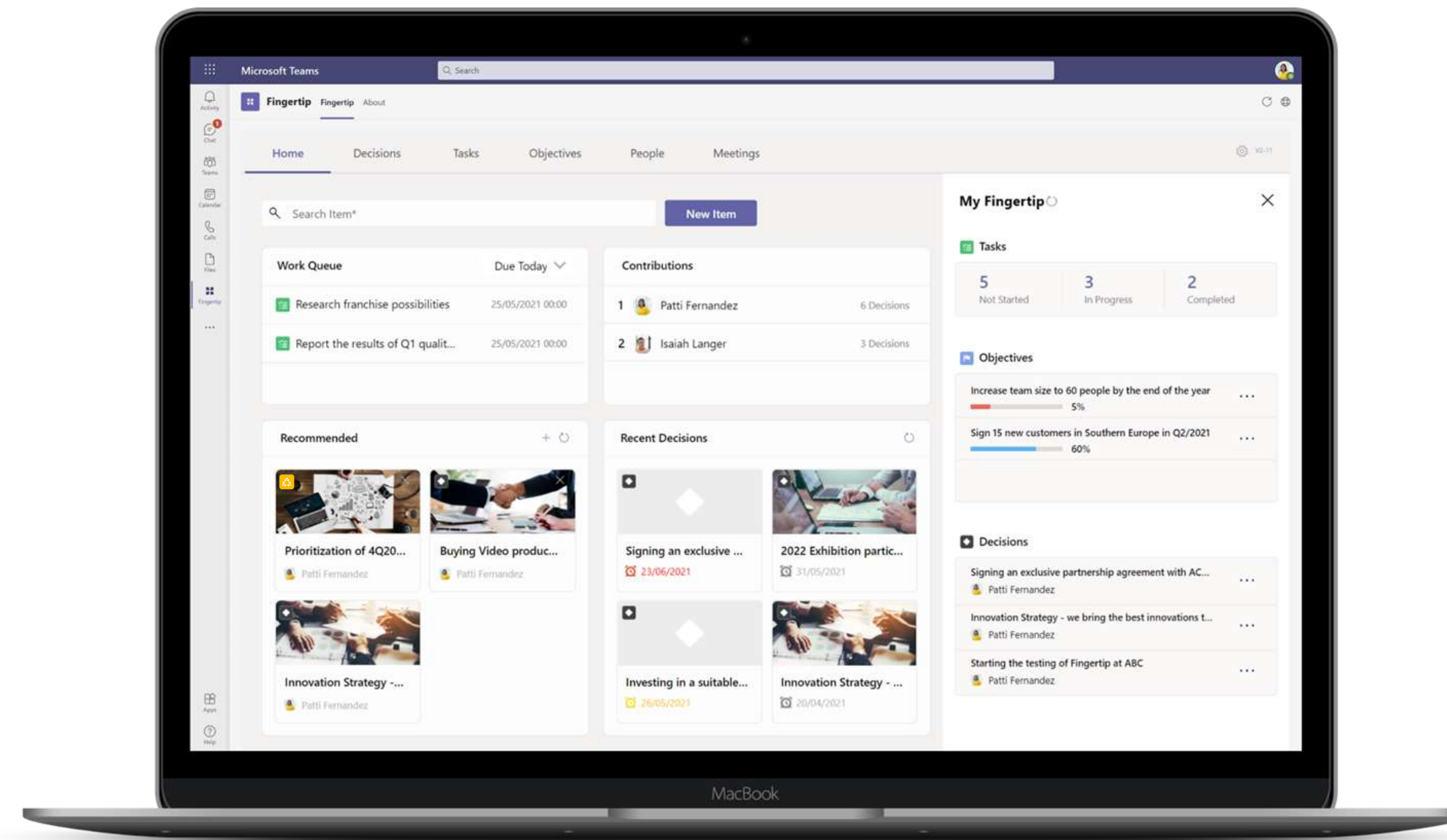
Step-by-step guides [MEETINGS]



How to create
a meeting

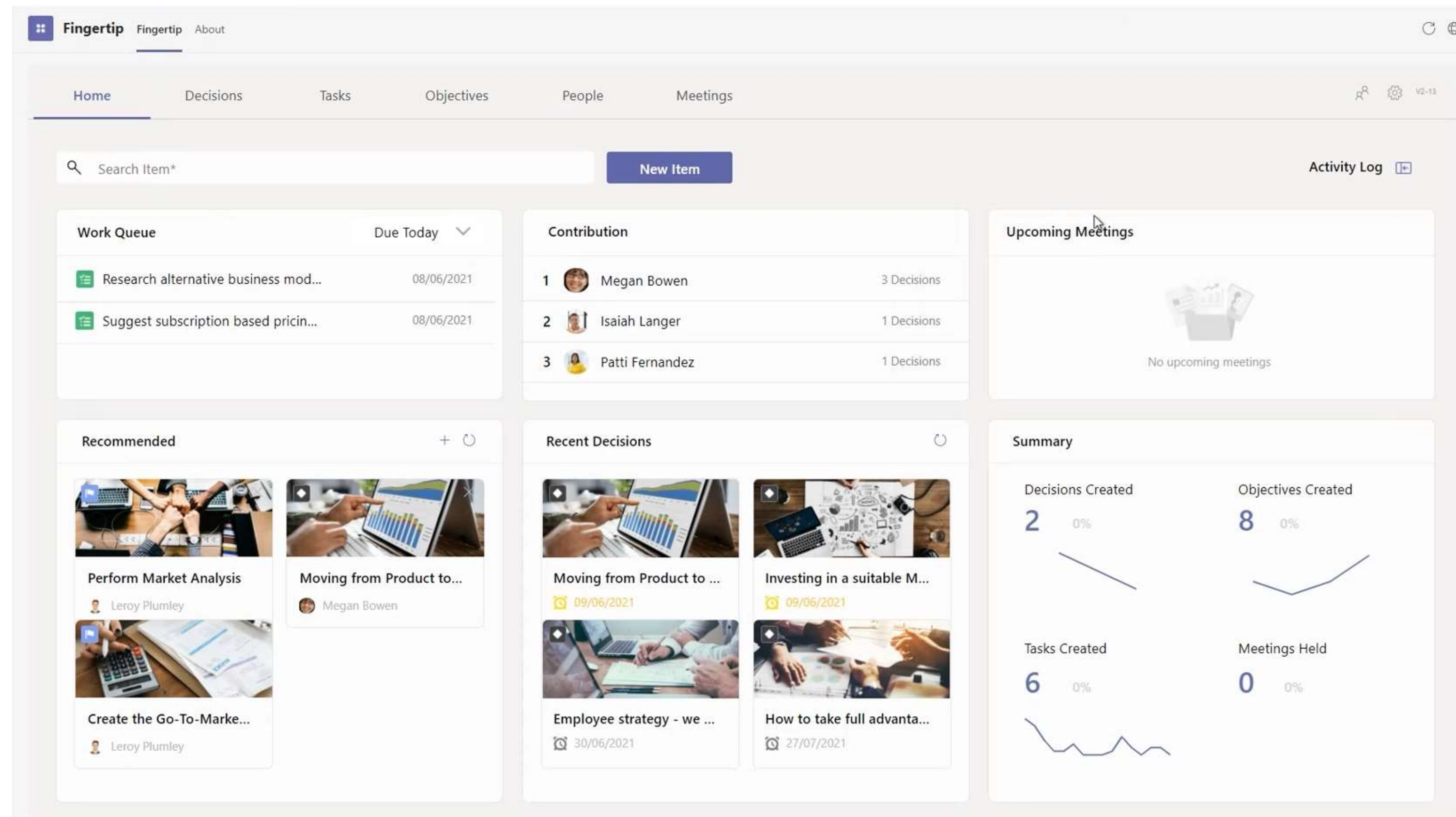
FINGERTIP.

Step-by-step guides



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 decisions, items recommended by others and upcoming meetings.

Using the Fingertip Home Page

The screenshot displays the Fingertip Home Page. At the top, there is a navigation bar with tabs for Home, Decisions, Tasks, Objectives, People, and Meetings. Below this is a search bar labeled 'Search Item*' and a 'New Item' button. The main content area is divided into several sections: 'Work Queue' with a 'Due Today' filter, showing two tasks; 'Contribution' listing three team members and their decision counts; 'Recommended' featuring three project cards; 'Recent Decisions' showing four decision cards with dates; and a 'My Fingertip' sidebar on the right. The sidebar includes a 'Tasks' summary (7 Not Started, 3 In Progress, 0 Completed), 'Objectives' with two progress bars, and 'Decisions' with three entries.

Work Queue Due Today ▾

Task	Due Date
Research alternative business mod...	08/06/2021
Suggest subscription based pricin...	08/06/2021

Contribution

Rank	Name	Decisions
1	Megan Bowen	3 Decisions
2	Isaiah Langer	1 Decisions
3	Patti Fernandez	1 Decisions

Recommended + ↻

Perform Market Analysis
Leroy Plumley

Moving from Product to...
Megan Bowen

Create the Go-To-Market...
Leroy Plumley

Recent Decisions ↻

Moving from Product to ...
09/06/2021

Investing in a suitable M...
09/06/2021

Employee strategy - we ...
30/06/2021

How to take full advanta...
27/07/2021

My Fingertip ↻

Tasks

Not Started	In Progress	Completed
7	3	0

Objectives

Recruit 18 new sales reps in Q2/2021
72.22%

15 subscription customers by start of 2022
13.33%

Decisions

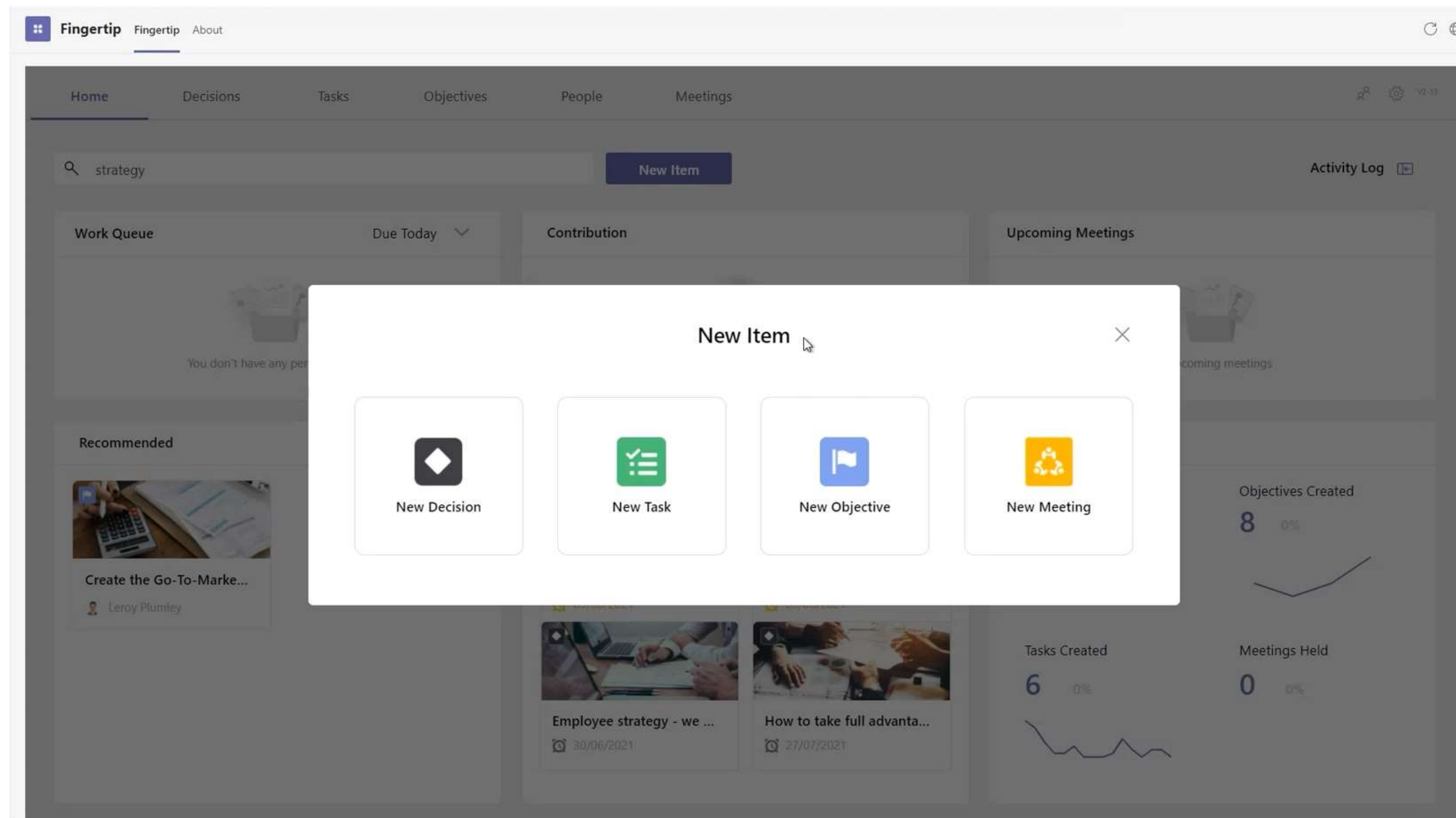
Moving from Product to Subscription based business mode...
Megan Bowen

Employee strategy - we have best people, best motivation a...
Megan Bowen

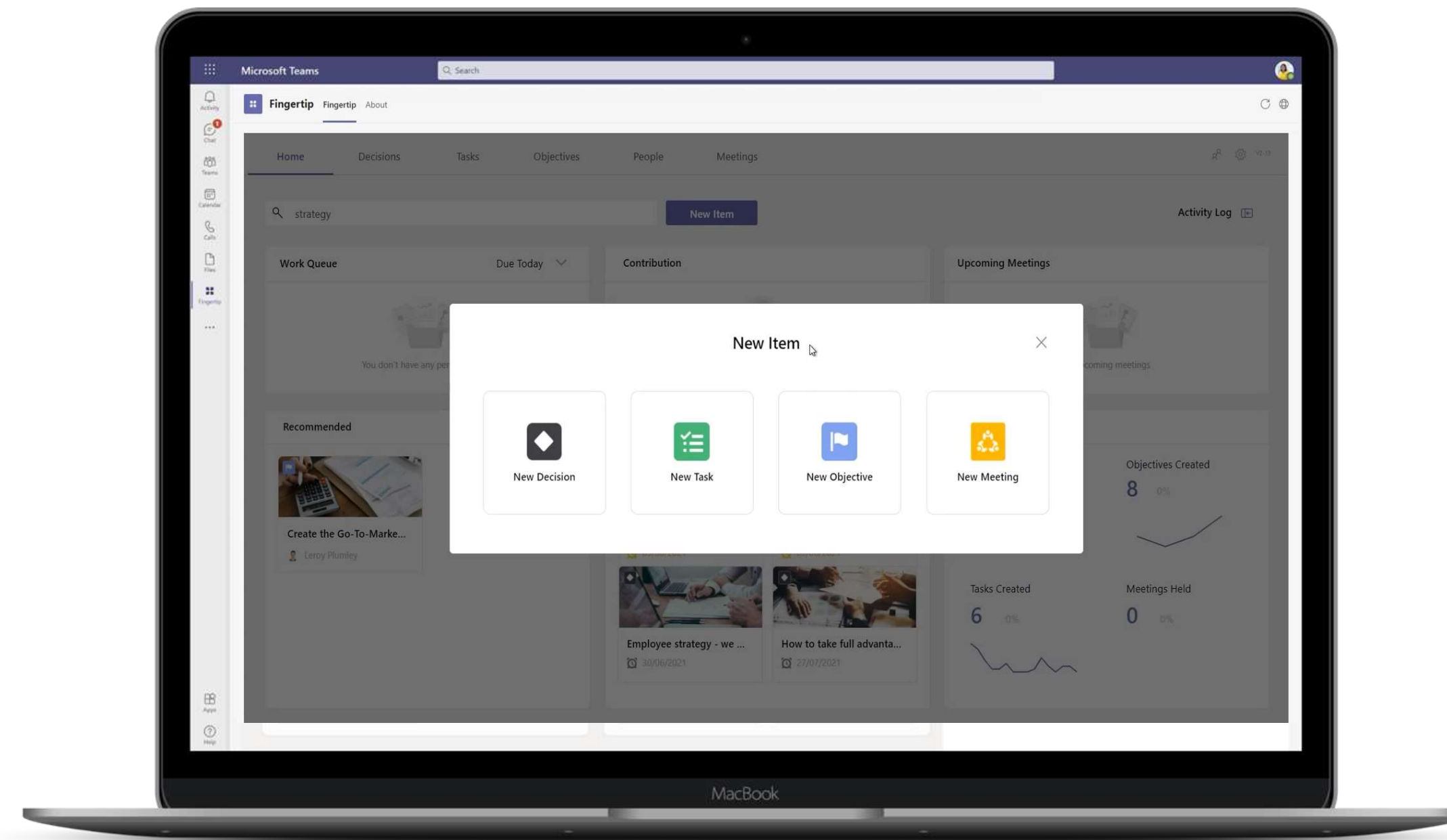
How to take full advantage of new marketing automation a...
Megan Bowen

If you open the **”Activity log”**, you will see your current task status, objectives you are responsible for and decision processes you have started.

Using the Fingertip Home Page

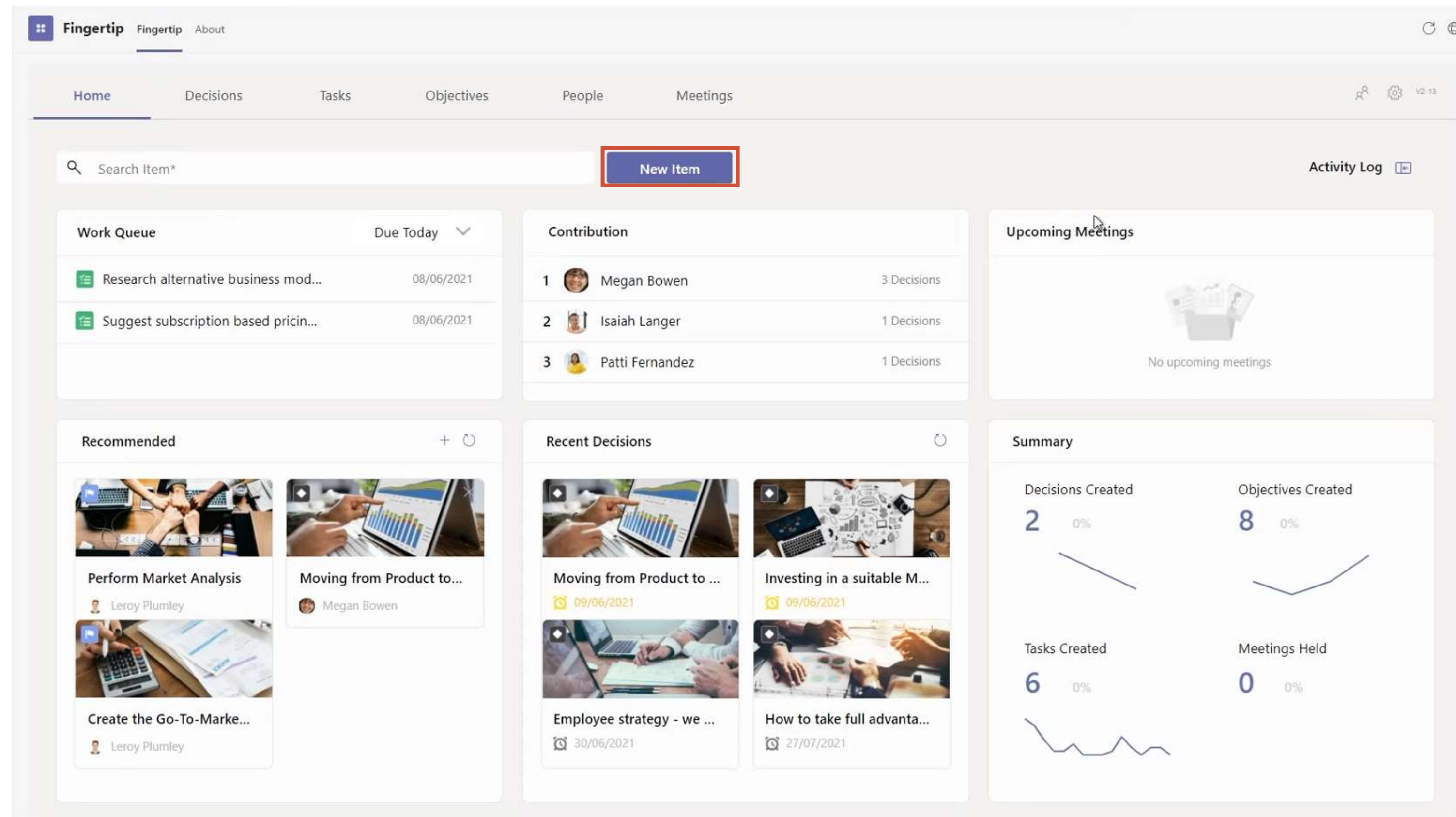


The New Item popup is perhaps the fastest way to get the ball rolling. Create new decisions, tasks, objectives or meetings transparently, and start collaborating!



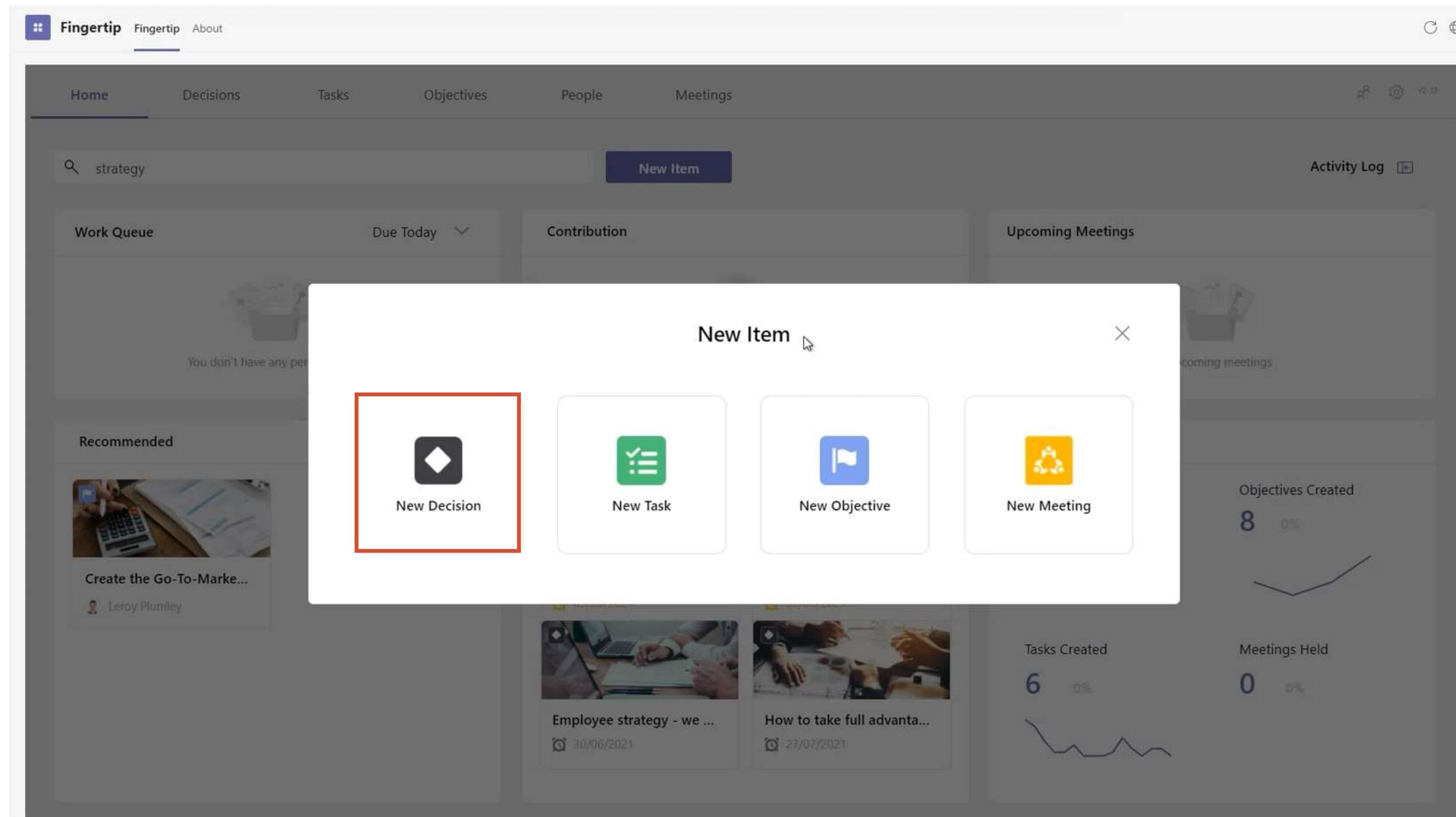
How to create a decision

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

How to create a decision



2. Select "New Decision"

How to create a decision

The screenshot shows the Fingertip application interface with a 'New Decision' modal open. The modal is titled 'New Decision' with a subtitle 'Decision details'. It contains the following fields and elements:

- * Title**: A text input field containing 'Selecting a partner for retail in Sweden'.
- Decision**: A text input field containing 'Explain the actual decision to be made or proposed'.
- Due Date**: A date input field showing '23/06/2021'.
- * Accountable**: A dropdown menu showing 'Megan Bowen'.
- Responsible(s)**: A list of user avatars and names: Nestor Wilke, Lidia Holloway, Adele Vance, and Diego Siciliani. Each name has a small 'x' icon to its right.
- Search user or group...**: A search input field with a magnifying glass icon.
- Create**: A blue button at the bottom right of the modal.

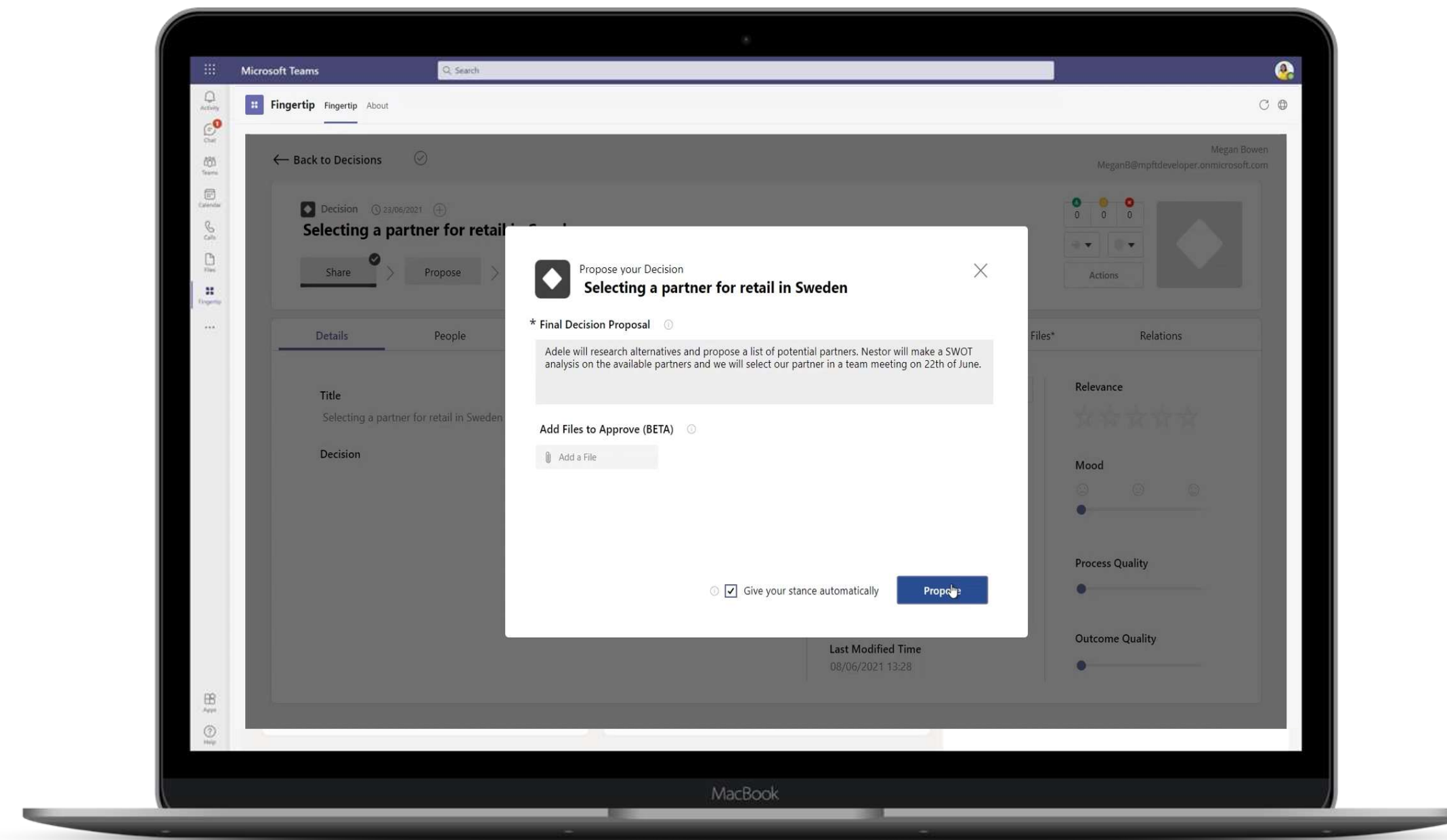
The background of the application shows a navigation bar with 'Home', 'Decisions', 'Tasks', 'Objectives', 'People', and 'Meetings'. The 'Decisions' tab is active. On the left, there is a 'Work Queue' section with a trash can icon and the text 'You don't have any pending work'. Below that is a 'Recommended' section with a card titled 'Create the Go-To-Market...' by Leroy Plumley. On the right, there is an 'Activity Log' section and a dashboard with metrics: 'Objectives Created' (8, 0%) and 'Meetings Held' (0, 0%).

3. Insert your decision details and invite individuals or teams. Remember to be specific!
4. Click "Create" to share the decision

How to create a decision

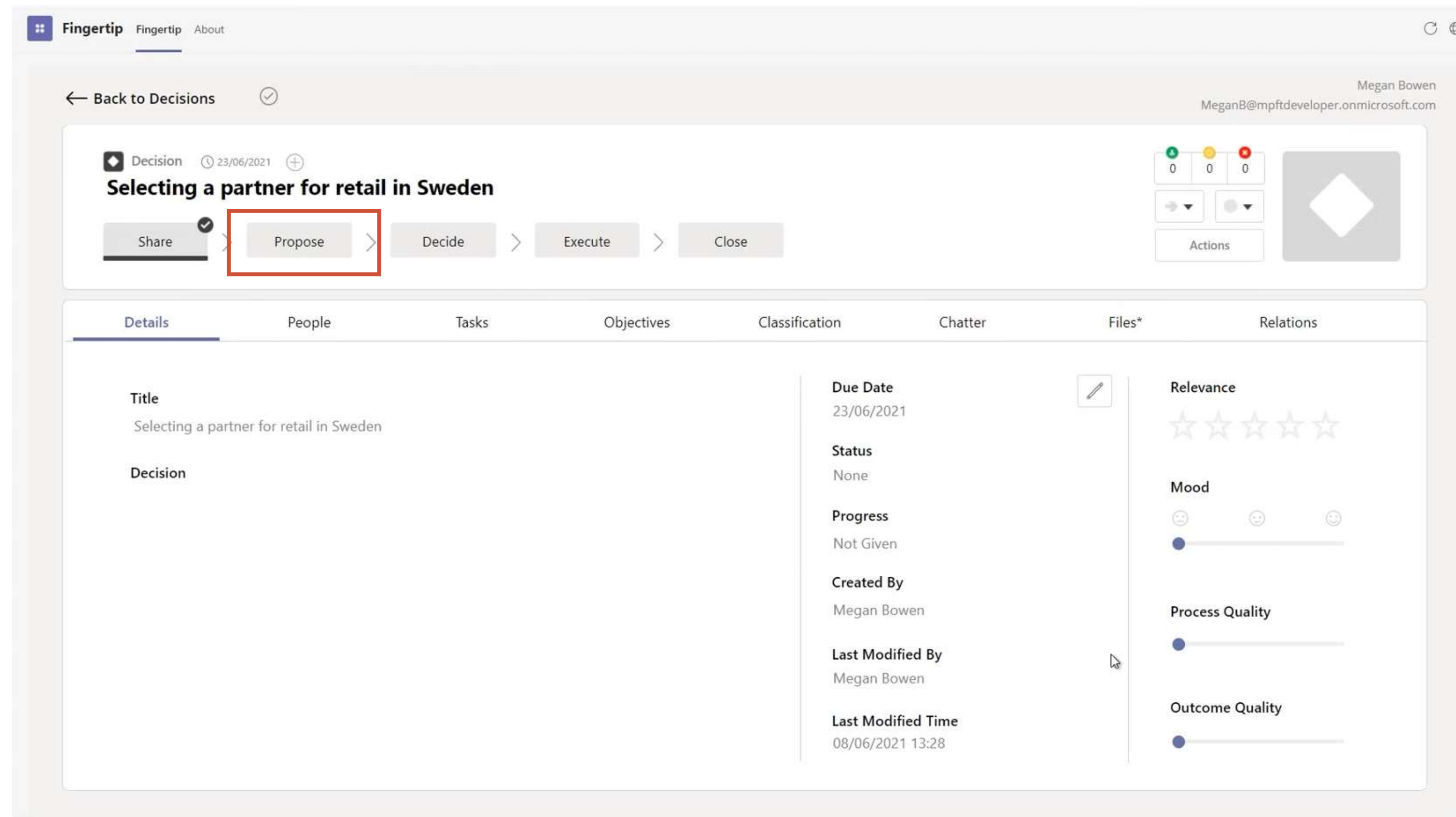
The screenshot shows the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below it, a header section includes a 'Back to Decisions' link, a checkmark icon, and the user's name 'Megan Bowen' with their email 'MeganB@mpftdeveloper.onmicrosoft.com'. The main content area features a decision card for 'Selecting a partner for retail in Sweden', created on '23/06/2021'. The card has a progress bar with steps: 'Share' (checked), 'Propose', 'Decide', 'Execute', and 'Close'. To the right of the card are three colored circles (green, yellow, red) each with a '0' below it, and a large grey diamond icon. Below the card is a tabbed interface with 'Details' selected. The 'Details' tab shows the decision title, a 'Decision' section, and a list of metadata: 'Due Date' (23/06/2021), 'Status' (None), 'Progress' (Not Given), 'Created By' (Megan Bowen), 'Last Modified By' (Megan Bowen), and 'Last Modified Time' (08/06/2021 13:28). To the right of the metadata are four rating sections: 'Relevance' (5 stars), 'Mood' (3 smiley faces), 'Process Quality' (slider), and 'Outcome Quality' (slider).

5. Done! **You're** decision has been shared to the participants



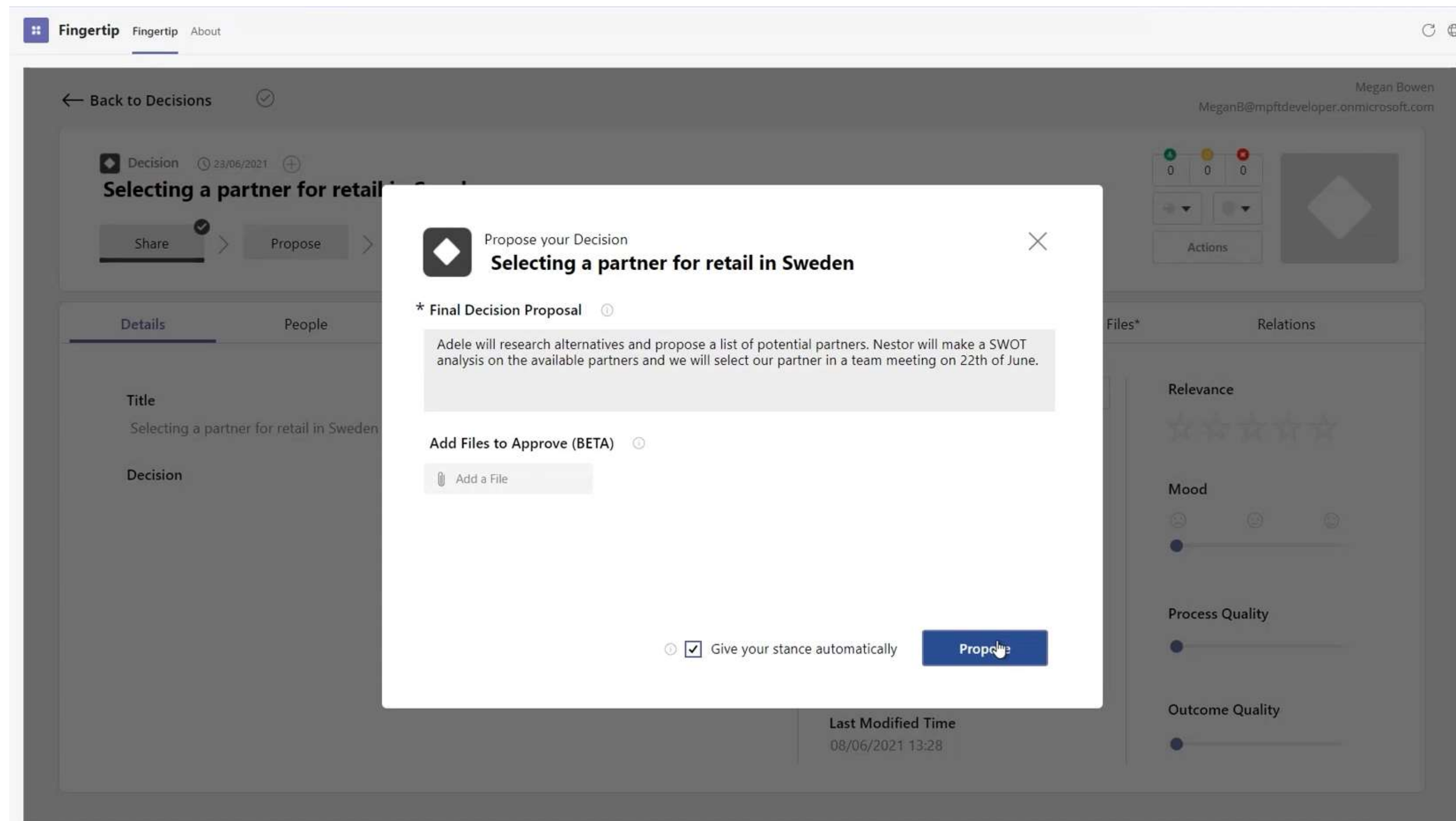
How to propose a decision

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.

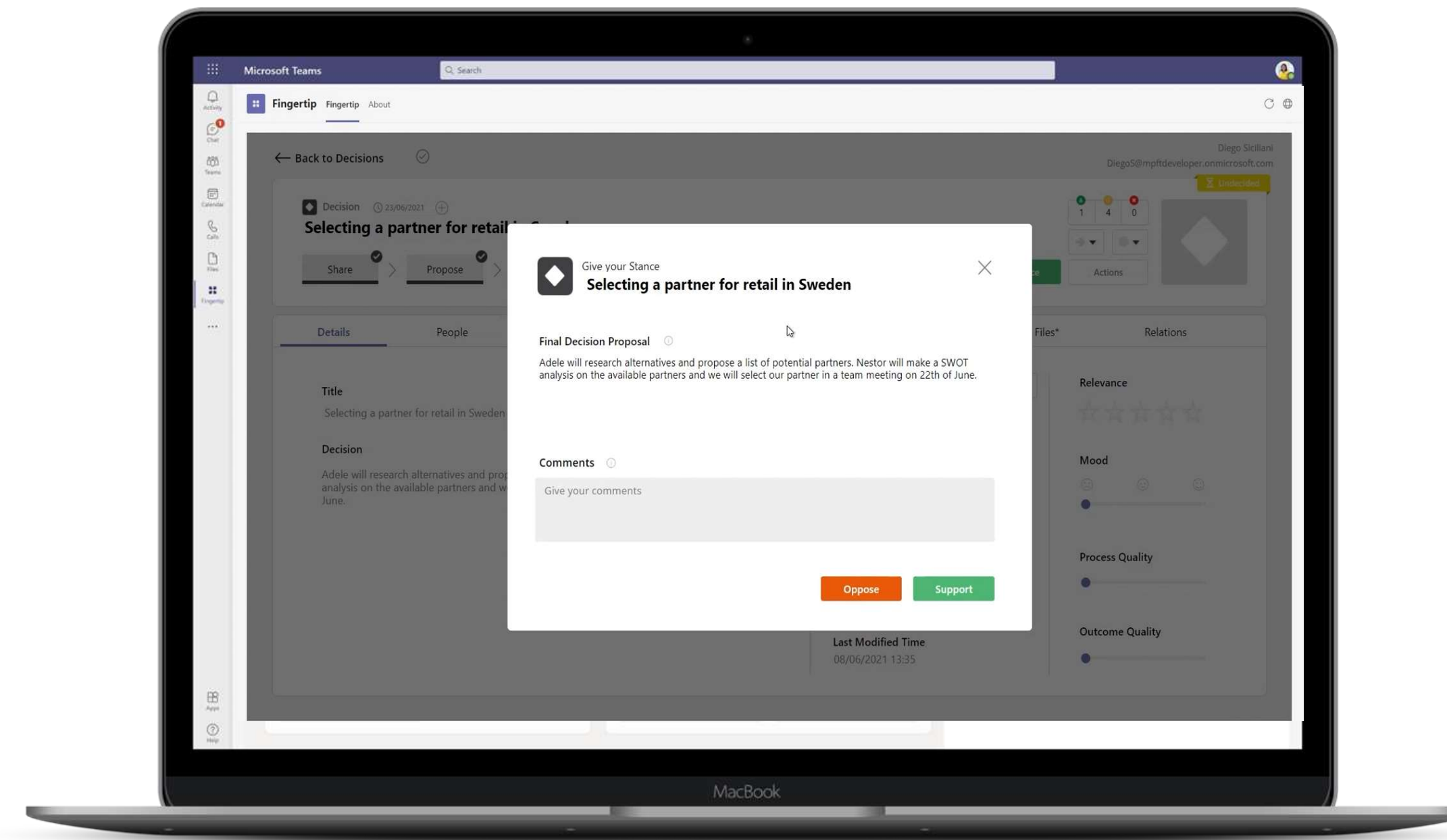
How to propose a decision

The screenshot displays the Fingertip web application interface for proposing a decision. At the top, the navigation bar includes the Fingertip logo, 'Fingertip', and 'About' links. A 'Back to Decisions' link with a checkmark icon is on the left. The main header area shows the decision title 'Selecting a partner for retail in Sweden' with a timestamp '23/06/2021' and a user profile for Megan Bowen (MeganB@mpftdeveloper.onmicrosoft.com). A progress bar at the top right indicates the decision is 'Undecided' with a yellow diamond icon. Below the header, a horizontal navigation bar contains tabs: Details, People, Tasks, Objectives, Classification, Chatter, Files*, and Relations. The 'Details' tab is active, showing a form with the following fields:

- Title:** Selecting a partner for retail in Sweden
- Decision:** Adele will research alternatives and propose a list of potential partners. Nestor will make a SWOT analysis on the available partners and we will select our partner in a team meeting on 22th of June.
- Due Date:** 23/06/2021
- Status:** Undecided
- Progress:** Not Given
- Created By:** Megan Bowen
- Last Modified By:** Megan Bowen
- Last Modified Time:** 08/06/2021 13:35
- Relevance:** A star rating system with five stars, all currently empty.
- Mood:** A slider control with three smiley face icons and a blue dot at the start.
- Process Quality:** A slider control with a blue dot at the start.
- Outcome Quality:** A slider control with a blue dot at the start.

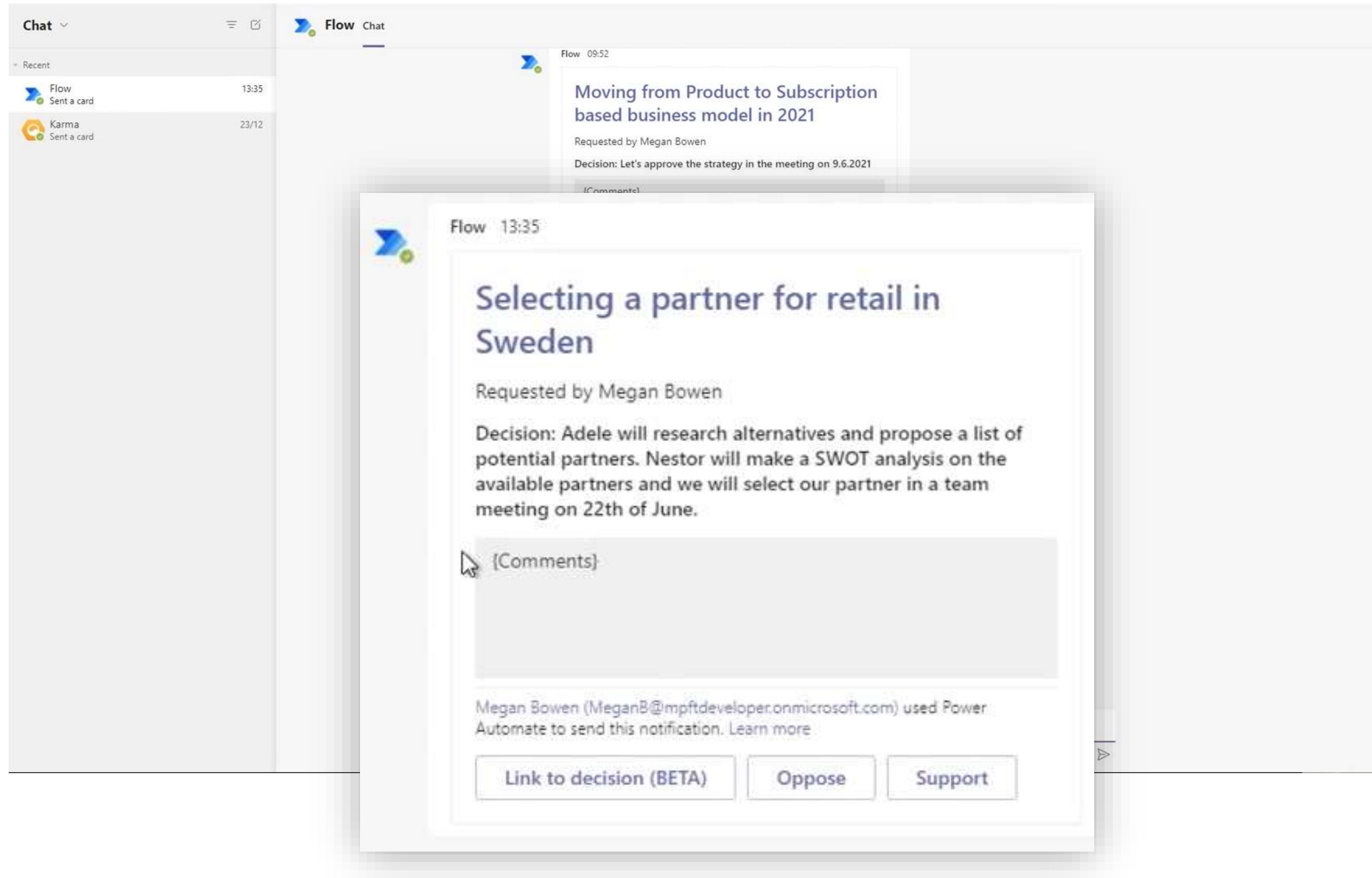
At the bottom of the form, there is an 'Approve' button with a green checkmark icon and an 'Actions' button.

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



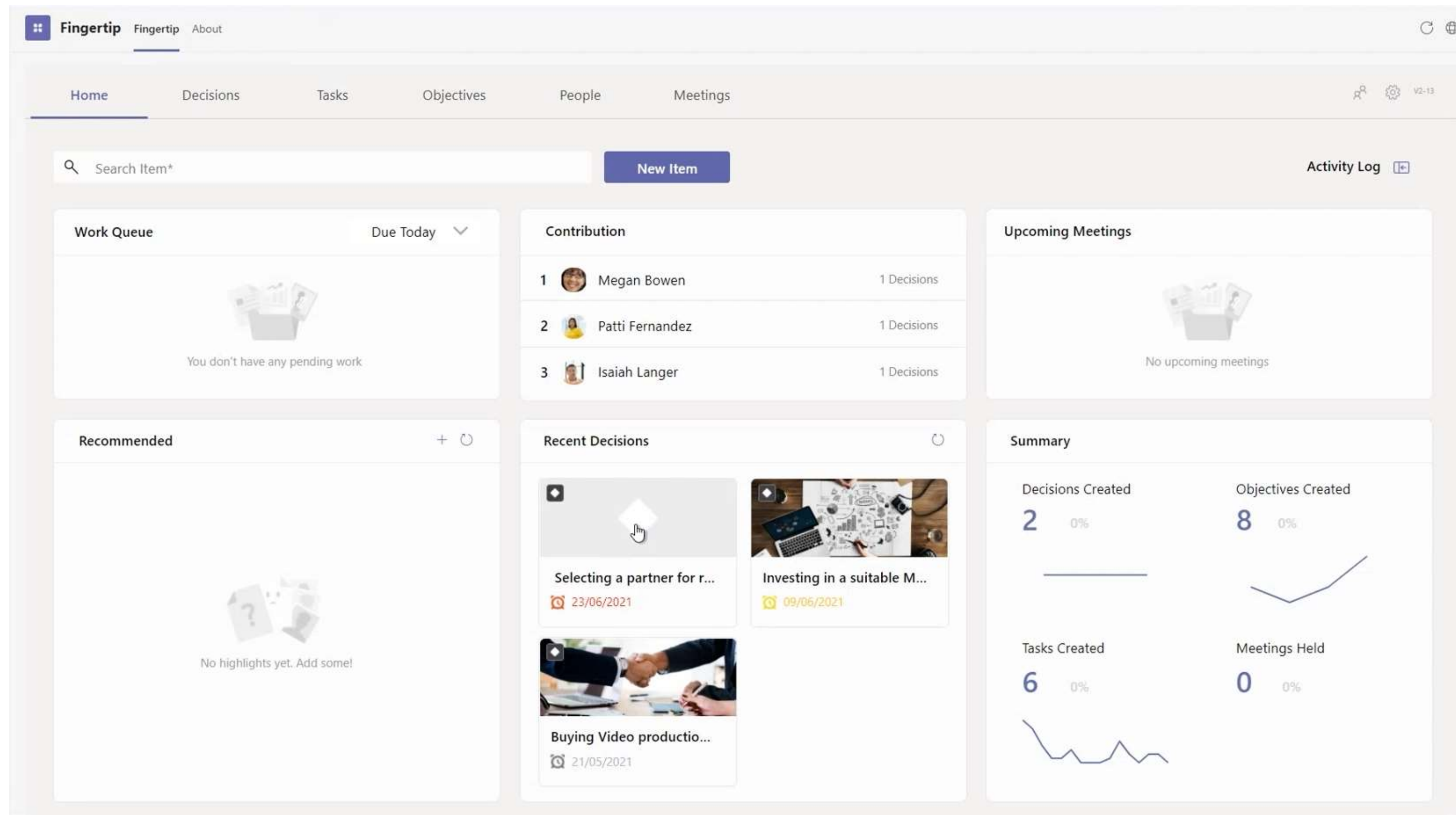
How to give a stance
to a decision

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 decisions box, or you can locate it in the decisions tab.

How to give a stance to a decision

Fingertip

Fingertip

About

Home

Decisions

Tasks

Objectives

People

Meetings

Decisions

6 Items

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Search for a Decision

New Decision

Progress	Title	My Stance	Status	My Role	Decision	Phase	Due Date	Accountable	
<div></div>	Selecting a partner for retail in Sweden	<div></div>	<div></div>	<div>A</div>	Adele will research alternatives...	Decide	23/06/2021	Megan Bowen	>
<div></div>	Moving from Product to Subscription based ...	<div></div>	<div></div>	<div>A</div>	Let's approve the strategy in t...	Propose	09/06/2021	Megan Bowen	>
<div></div>	Investing in a suitable Marketing Engine for ...			<div>R</div>		Share	09/06/2021	Isaiah Langer	>
<div></div>	Employee strategy - we have best people, be...			<div>A</div>		Share	30/06/2021	Megan Bowen	>
<div></div>	How to take full advantage of new marketin...			<div>A</div>		Share	27/07/2021	Megan Bowen	>
<div></div>	Signing an exclusive partnership agreement ...	<div></div>	<div></div>	<div>R</div>	We need a reliable and trusted...	Decide	23/06/2021	Patti Fernandez	>



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

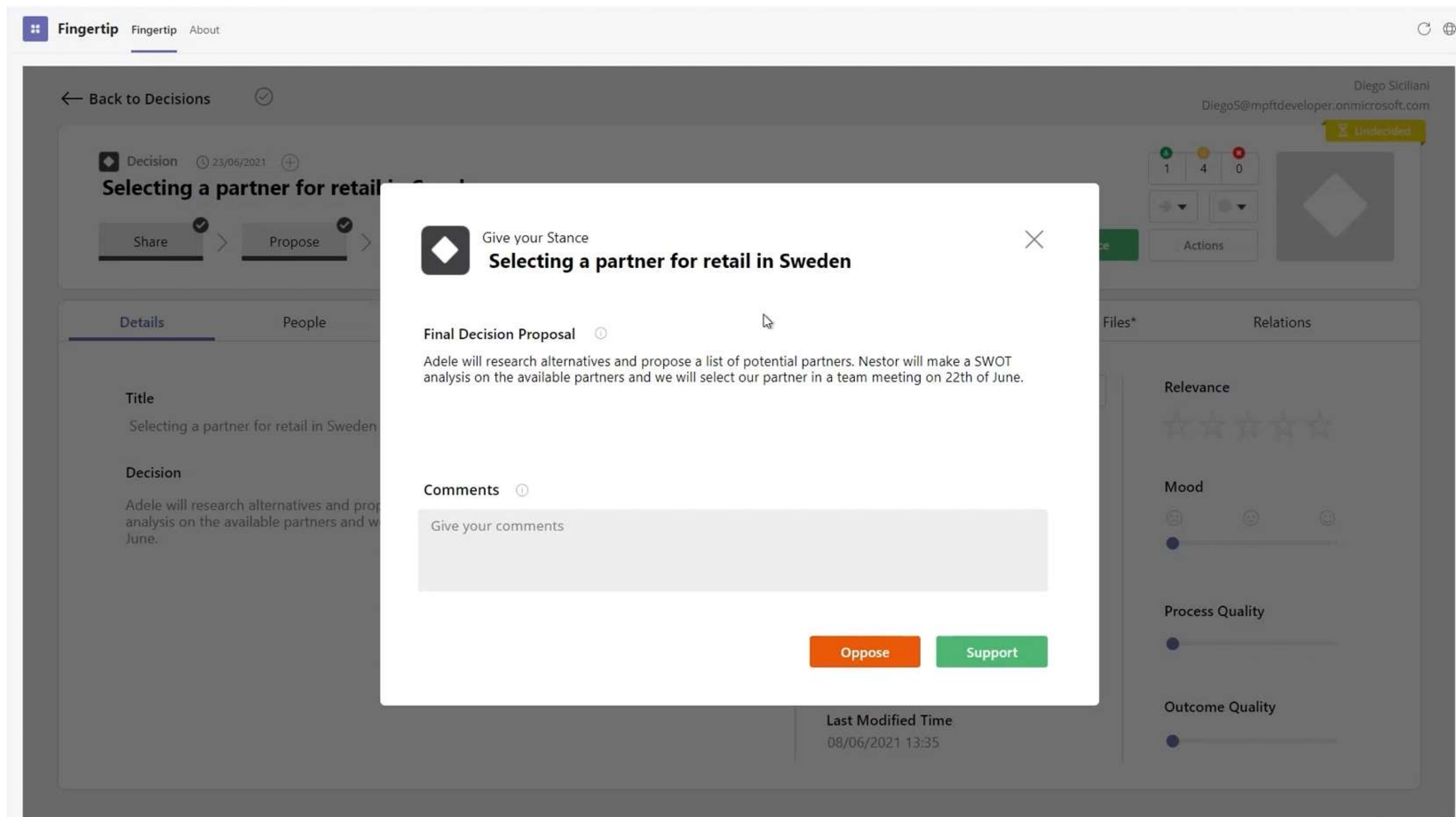
How to give a stance to a decision

The screenshot displays the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below this, a 'Back to Decisions' link is visible. The main content area shows a decision item titled 'Selecting a partner for retail in Sweden'. The decision card includes a workflow with steps: Share, Propose, Decide, Execute, and Close. A green 'Stance' button is prominently displayed. To the right of the decision card, there's a summary section showing a score of 1 (green), 4 (yellow), and 0 (red), along with an 'Undecided' status. Below the decision card, there's a tabbed interface with 'Details' selected. The 'Details' tab shows the following information:

- Title:** Selecting a partner for retail in Sweden
- Decision:** Adele will research alternatives and propose a list of potential partners. Nestor will make a SWOT analysis on the available partners and we will select our partner in a team meeting on 22th of June.
- Due Date:** 23/06/2021
- Status:** Undecided
- Progress:** Not Given
- Created By:** Megan Bowen
- Last Modified By:** Megan Bowen
- Last Modified Time:** 08/06/2021 13:35
- Relevance:** 5 stars (all stars are greyed out)
- Mood:** A slider with three smiley face icons (sad, neutral, happy) and a blue dot indicating a position.
- Process Quality:** A slider with a blue dot indicating a position.
- Outcome Quality:** A slider with a blue dot indicating a position.

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



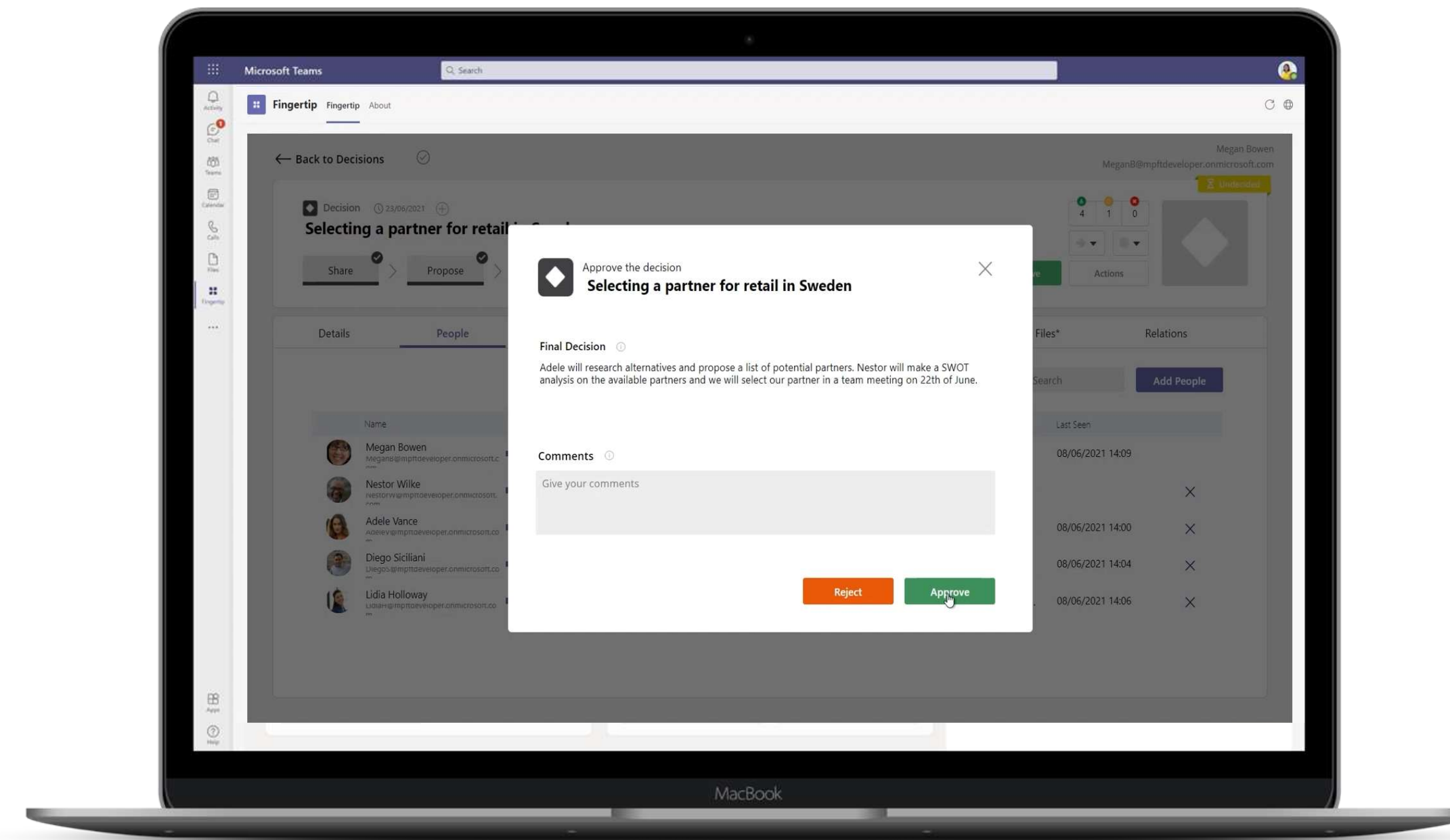
5. You can include a comment with your stance when you support or oppose the proposal.
6. Click on the stance you wish to communicate to the decision owner.

How to give a stance to a decision

The screenshot displays the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below this, a header section includes a 'Back to Decisions' link and a user profile for 'Diego Siciliani' with email 'DiegoS@mpftdeveloper.onmicrosoft.com'. The main content area is titled 'Decision' with a timestamp '23/06/2021' and a plus icon. The decision title is 'Selecting a partner for retail in Sweden'. Below the title, there's a workflow bar with buttons: 'Share' (checked), 'Propose' (checked), 'Decide', 'Execute', and 'Close'. To the right of the workflow bar, there's a status indicator showing '2' (green), '3' (yellow), and '0' (red), along with a large diamond icon and an 'Actions' button. The main content area is divided into tabs: 'Details', 'People', 'Tasks', 'Objectives', 'Classification', 'Chatter', 'Files*', and 'Relations'. The 'Details' tab is active, showing the following information:

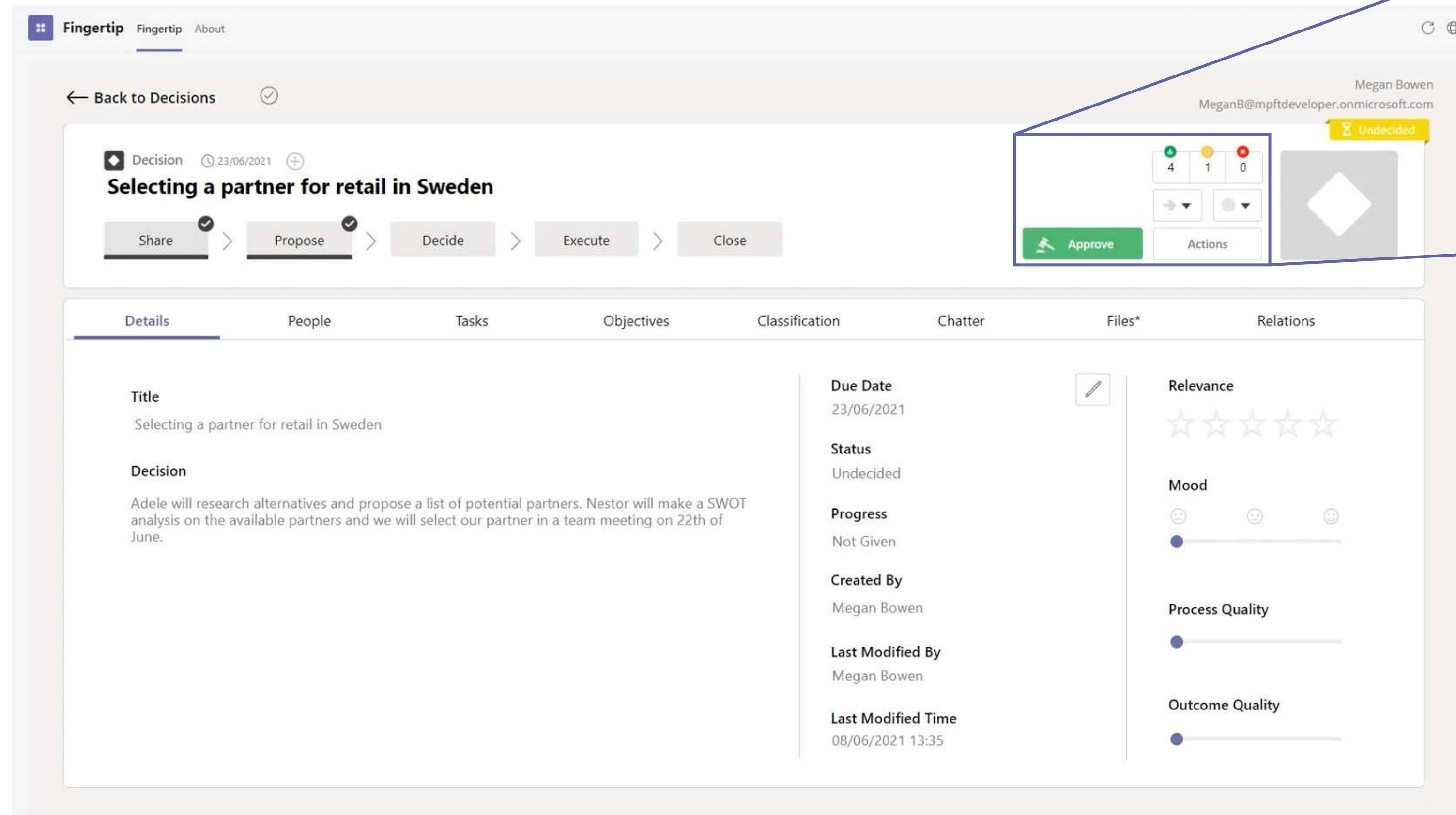
- Title:** Selecting a partner for retail in Sweden
- Decision:** Adele will research alternatives and propose a list of potential partners. Nestor will make a SWOT analysis on the available partners and we will select our partner in a team meeting on 22th of June.
- Due Date:** 23/06/2021
- Status:** Undecided
- Progress:** Not Given
- Created By:** Megan Bowen
- Last Modified By:** Megan Bowen
- Last Modified Time:** 08/06/2021 13:35
- Relevance:** 5 stars (all stars are empty)
- Mood:** A slider with three smiley face icons (sad, neutral, happy) and a blue dot at the start.
- Process Quality:** A slider with a blue dot at the start.
- Outcome Quality:** A slider with a blue dot at the start.

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.



How to approve
a decision

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

How to approve a decision

[Fingertip](#)
[Fingertip](#)
[About](#)

[← Back to Decisions](#)

Decision
23/06/2021

Selecting a partner for retail in Sweden

Share

Propose

Decide

Execute

Close

Approve

Actions

4

1

0

Undecided

Details
People
Tasks
Objectives
Classification
Chatter
Files*
Relations

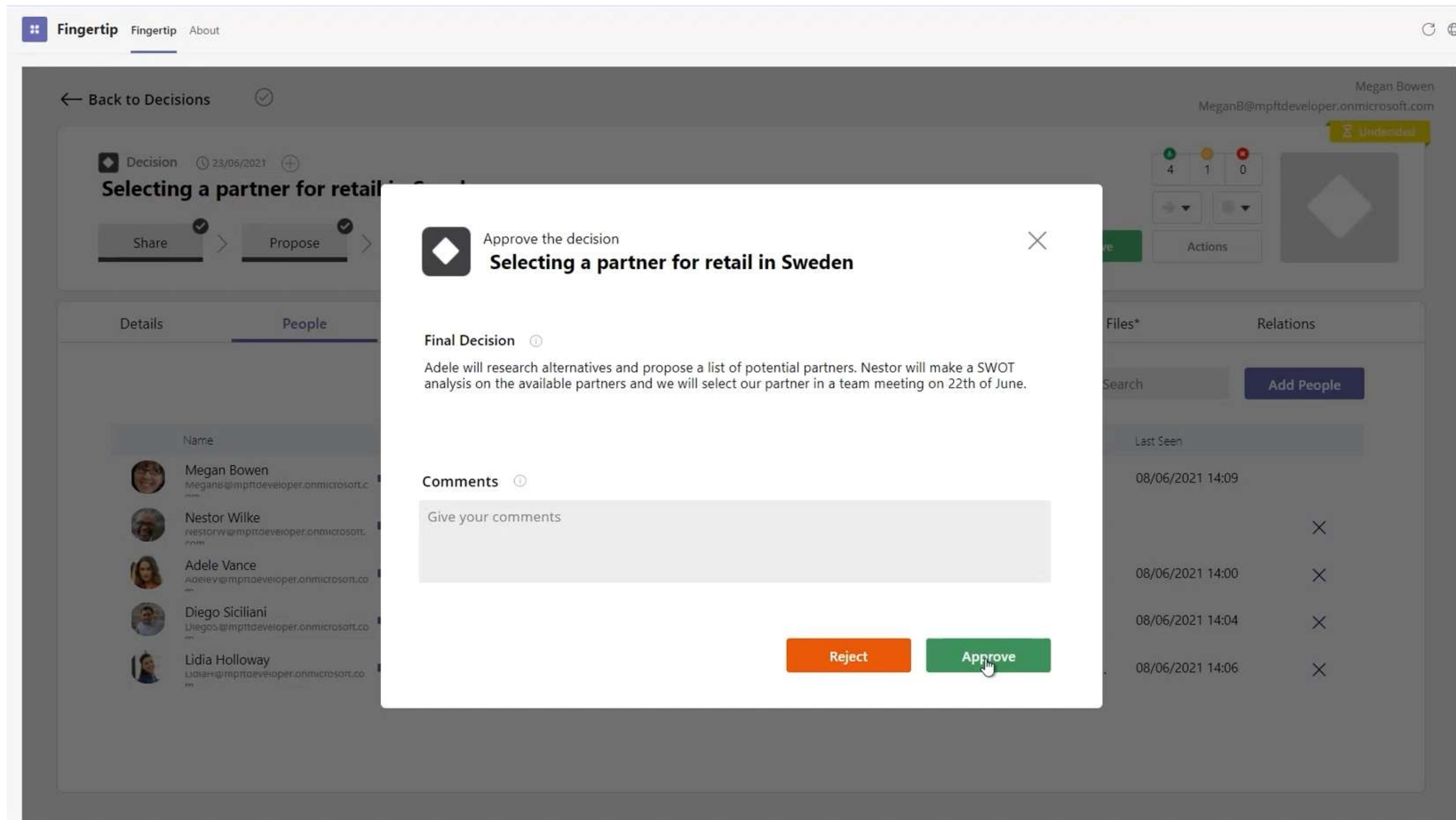
Search

Add People

Name	Contribution	Stance	Approval	Role	Comment	Last Seen
Megan Bowen MeganB@mpftdeveloper.onmicrosoft.com	<div></div>			A		08/06/2021 14:09
Nestor Wilke nestorw@mpftdeveloper.onmicrosoft.com	<div></div>			R		×
Adele Vance Adelev@mpftdeveloper.onmicrosoft.com	<div></div>			R	It's about time we open in Sweden!	08/06/2021 14:00 ×
Diego Siciliani DiegoS@mpftdeveloper.onmicrosoft.com	<div></div>			R		08/06/2021 14:04 ×
Lidia Holloway LidiaH@mpftdeveloper.onmicrosoft.com	<div></div>			R	I'm a bit on the fence here. Maybe we should do t...	08/06/2021 14:06 ×

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

How to approve a decision



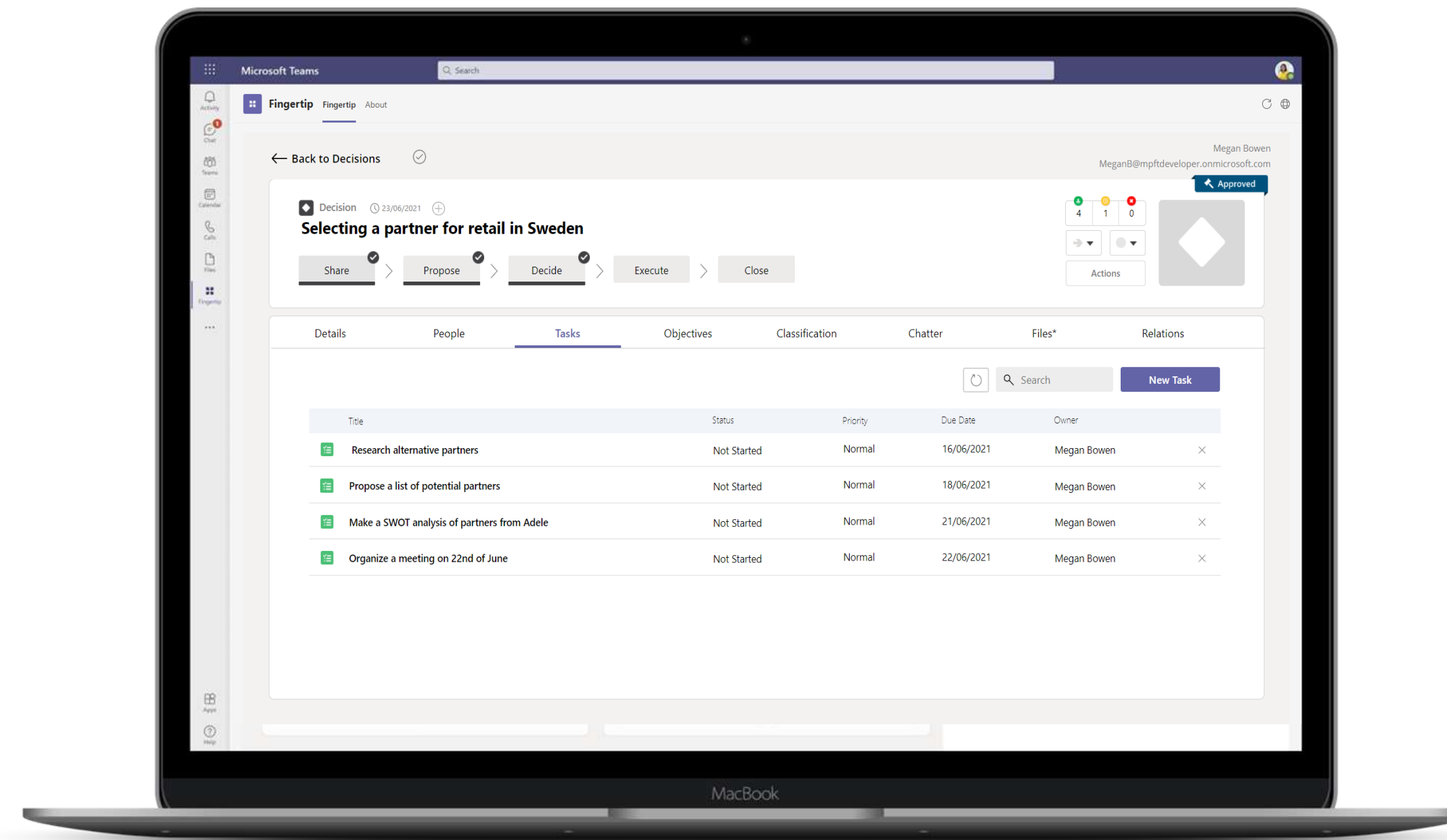
3. In the approval popup, you can add a comment regarding your decision and the click "Approve" or "Reject" to make the decision.

How to approve a decision

The screenshot shows the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below it, a 'Back to Decisions' link is visible. The main content area displays a decision titled 'Selecting a partner for retail in Sweden' with a date of 23/06/2021. A progress bar shows the steps: Share, Propose, Decide (current step), Execute, and Close. To the right of the progress bar, there are counters for 4 green votes, 1 yellow vote, and 0 red votes, along with an 'Actions' button. Below the progress bar, there are tabs for Details, People, Tasks, Objectives, Classification, Chatter, Files*, and Relations. The 'People' tab is active, showing a list of participants with their names, contribution sliders, stances, approval status, roles, comments, and last seen times. Megan Bowen is the proposer (role 'A') and has approved the decision (blue checkmark icon). Other participants (roles 'R') have not yet approved. A callout box highlights the 'Approved' button in the top right corner of the interface.

Name	Contribution	Stance	Approval	Role	Comment	Last Seen
Megan Bowen MeganB@mpftdeveloper.onmicrosoft.com	<div><div></div></div>	🟢	✅	A		08/06/2021 14:09
Nestor Wilke nestorw@mpftdeveloper.onmicrosoft.com	<div><div></div></div>	🟡		R		
Adele Vance adelev@mpftdeveloper.onmicrosoft.com	<div><div></div></div>	🟢		R	It's about time we open in Sweden!	08/06/2021 14:00
Diego Siciliani DiegoS@mpftdeveloper.onmicrosoft.com	<div><div></div></div>	🟢		R		08/06/2021 14:04
Lidia Holloway lidiah@mpftdeveloper.onmicrosoft.com	<div><div></div></div>	🟢		R	I'm a bit on the fence here. Maybe we should do t...	08/06/2021 14:06

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



How to manage tasks in a decision

How to manage tasks in a decision

The screenshot shows the Fingertip web application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below this, a header section includes a 'Back to Decisions' link, a decision icon, the title 'Selecting a partner for retail in Sweden', a date '23/06/2021', and a user profile for Megan Bowen. A progress bar shows stages: Share, Propose, Decide, Execute, and Close. To the right, there are counters for votes (4 green, 1 yellow, 0 red) and an 'Approved' button. The main content area has tabs for Details, People, Tasks, Objectives, Classification, Chatter, Files*, and Relations. The 'Tasks' tab is active, displaying a table of tasks.

Title	Status	Priority	Due Date	Owner	
Research alternative partners	Not Started	Normal	16/06/2021	Megan Bowen	×
Propose a list of potential partners	Not Started	Normal	18/06/2021	Megan Bowen	×
Make a SWOT analysis of partners from Adele	Not Started	Normal	21/06/2021	Megan Bowen	×
Organize a meeting on 22nd of June	Not Started	Normal	22/06/2021	Megan Bowen	×

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.

How to manage tasks in a decision

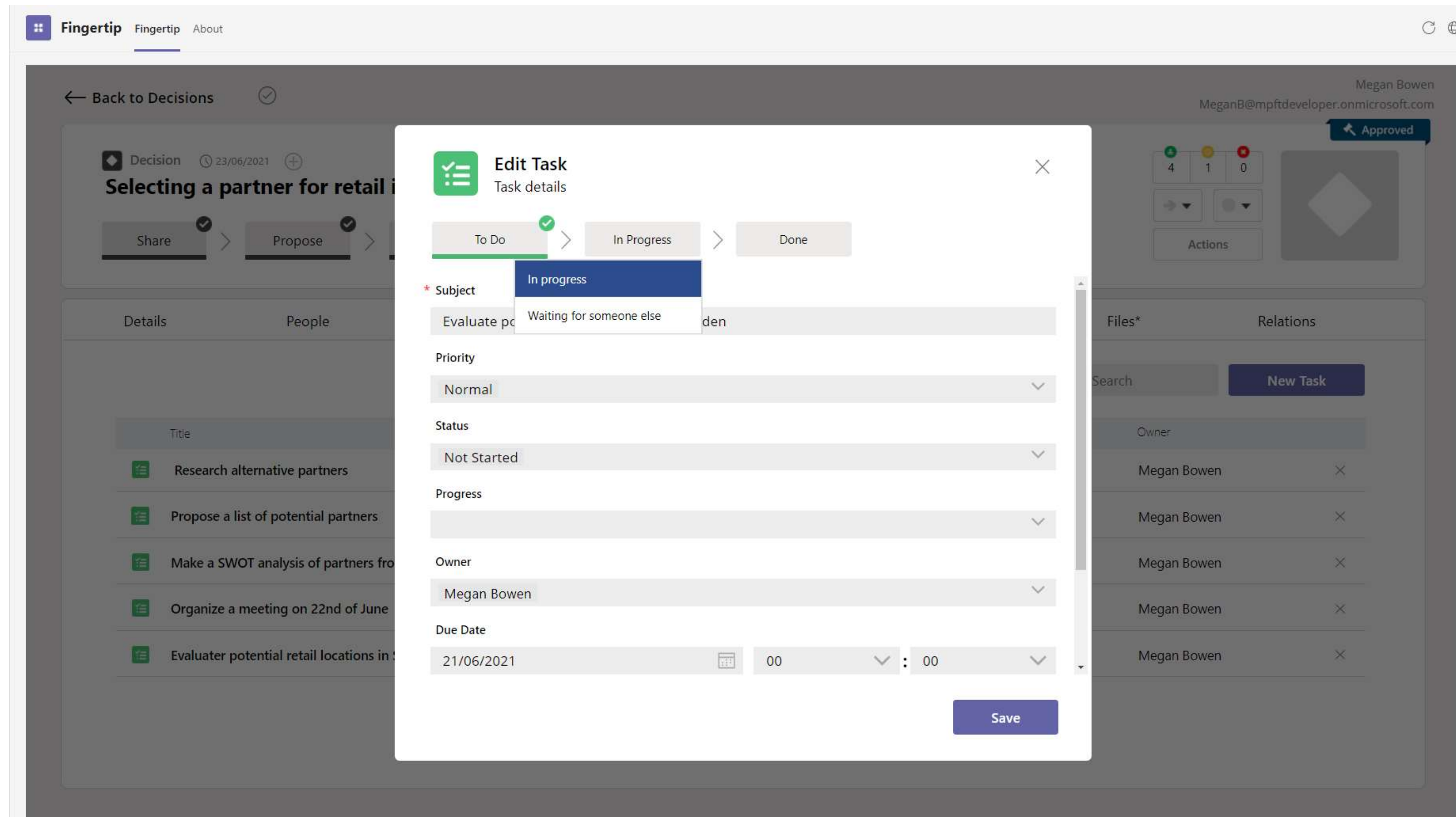
The screenshot displays the Fingertip web application interface. A modal window titled 'New Task' is open, allowing users to create a new task. The modal contains the following fields and options:

- Subject:** A text input field containing 'Evaluate potential retail locations in Sweden'.
- Priority:** A dropdown menu set to 'Normal'.
- Status:** A dropdown menu set to 'Not Started'.
- Due Date:** A date and time picker set to '21/06/2021' at '00:00'.
- Assign to:** A dropdown menu set to 'Megan Bowen'.
- Description:** A large text area for additional details.
- Save:** A blue button at the bottom right of the modal.

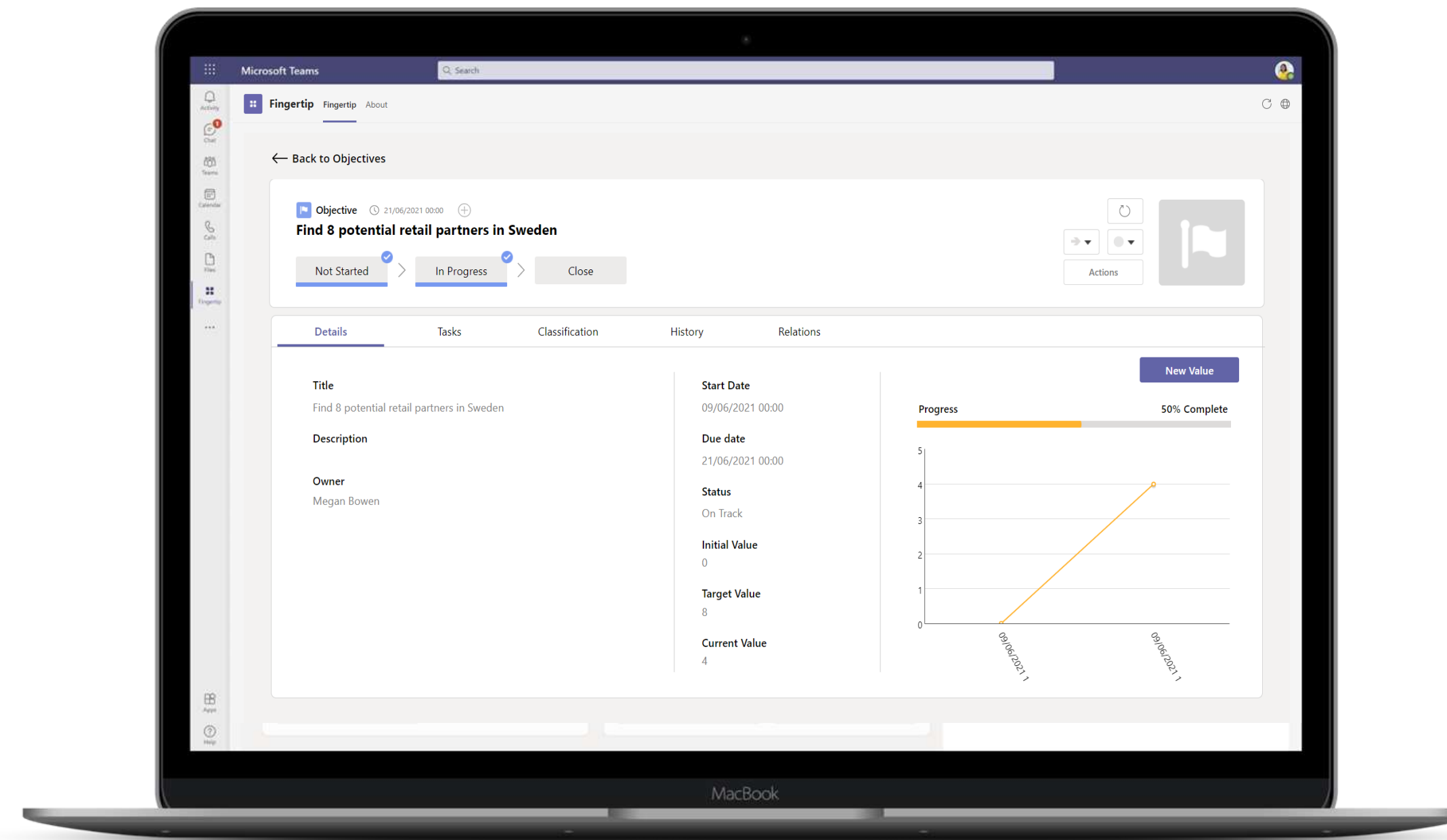
The background shows a decision titled 'Selecting a partner for retail' with a 'Share' button and a 'Propose' button. The user's name, Megan Bowen, and email address, MeganB@mpftdeveloper.onmicrosoft.com, are visible in the top right corner.

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.

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!



How to manage objectives in a decision

How to manage objectives in a decision

The screenshot displays the Fingertip web application interface. A modal window titled "New Objective" is open, allowing users to create a new objective for a decision. The modal contains the following fields:

- Title:** A text input field with the value "Sign a retail partner by the end of June".
- Status:** A dropdown menu with the selected value "Not Started".
- Priority:** A dropdown menu with the selected value "Normal".
- Start Date:** A date input field with the value "09/06/2021".
- Due Date:** A date input field with the value "30/06/2021".
- Initial Value:** A label for an input field, currently empty.

A "Create" button is located at the bottom right of the modal. The background shows a decision titled "Selecting a partner for retail" with a "Propose" button and a list of objectives.

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

How to manage objectives in a decision

The screenshot shows the Fingertip application interface with a 'New Objective' modal dialog open. The dialog is titled 'New Objective' with a sub-header 'Objective details'. It contains the following fields:

- Priority:** A dropdown menu currently set to 'Normal'.
- Start Date:** A date input field set to '09/06/2021'.
- * Due Date:** A date input field set to '30/06/2021'.
- * Initial Value:** A numeric input field set to '0'.
- * Target Value:** A numeric input field set to '1'.
- * Current Value:** A numeric input field set to '0'.
- Description:** A large text area for entering details.

A 'Create' button is located at the bottom right of the dialog. The background shows a decision titled 'Selecting a partner for retail' with a 'Propose' button and a 'New Objective' button in the top right corner.

3. Fill in the rest of the details

How to manage objectives in a decision

Fingertip

Fingertip

About

← Back to Decisions

✓

Decision

23/06/2021

+

Share

✓

Propose

✓

Decide

✓

Execute

Close

4

1

0

→

●

Actions

Approved

Megan Bowen

MeganB@mpftdeveloper.onmicrosoft.com

Details

People

Tasks

Objectives

Classification

Chatter

Files*

Relations

🔄

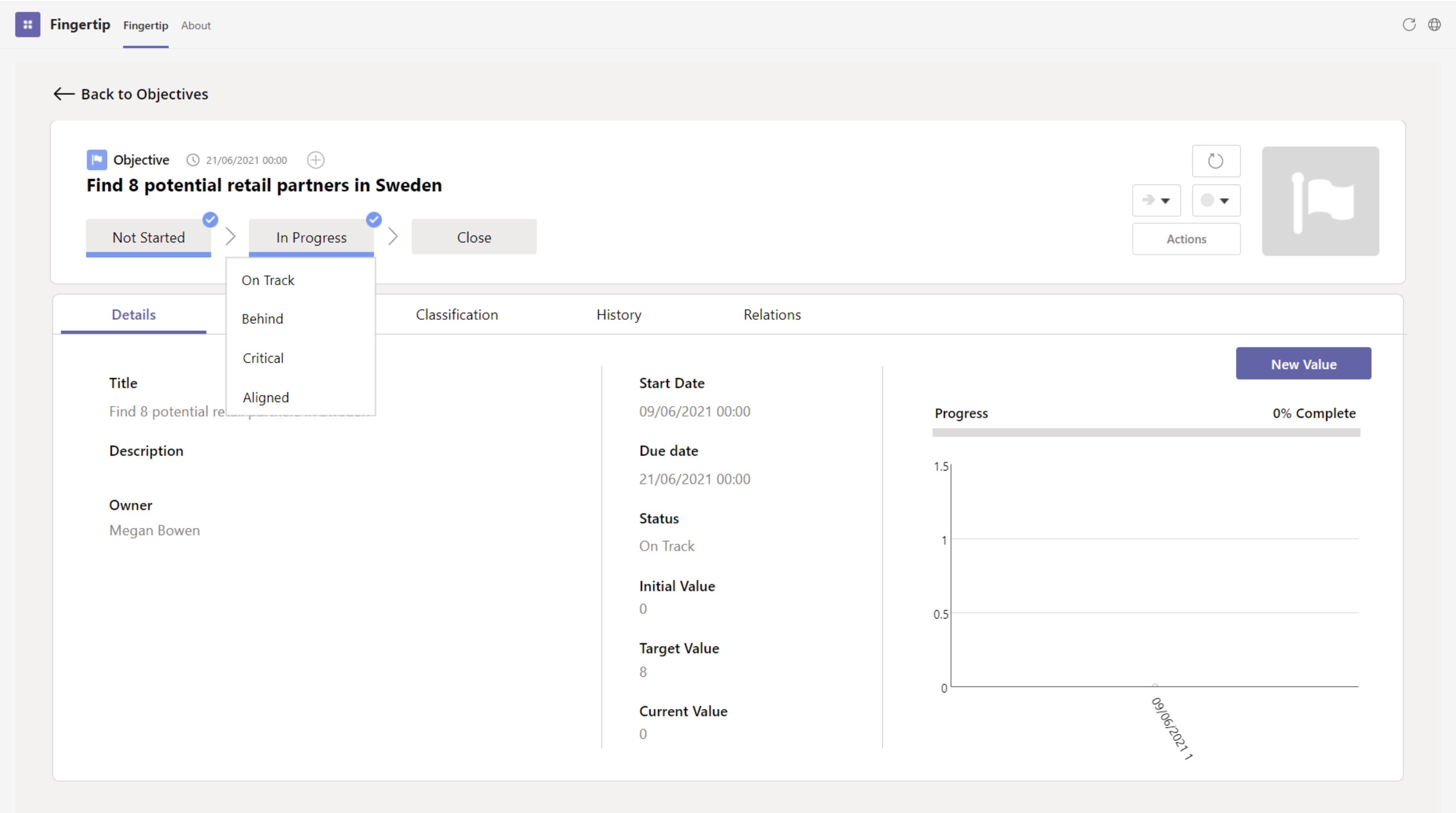
🔍 Search

New Objective

Title	Progress	Status	Priority	Due Date	Owner	
Find 8 potential retail partners in Sweden	0%	Not Started	Normal	21/06/2021	Megan Bowen	✕ >
Sign a retail partner by the end of June	0%	Not Started	Normal	30/06/2021	Megan Bowen	✕ >

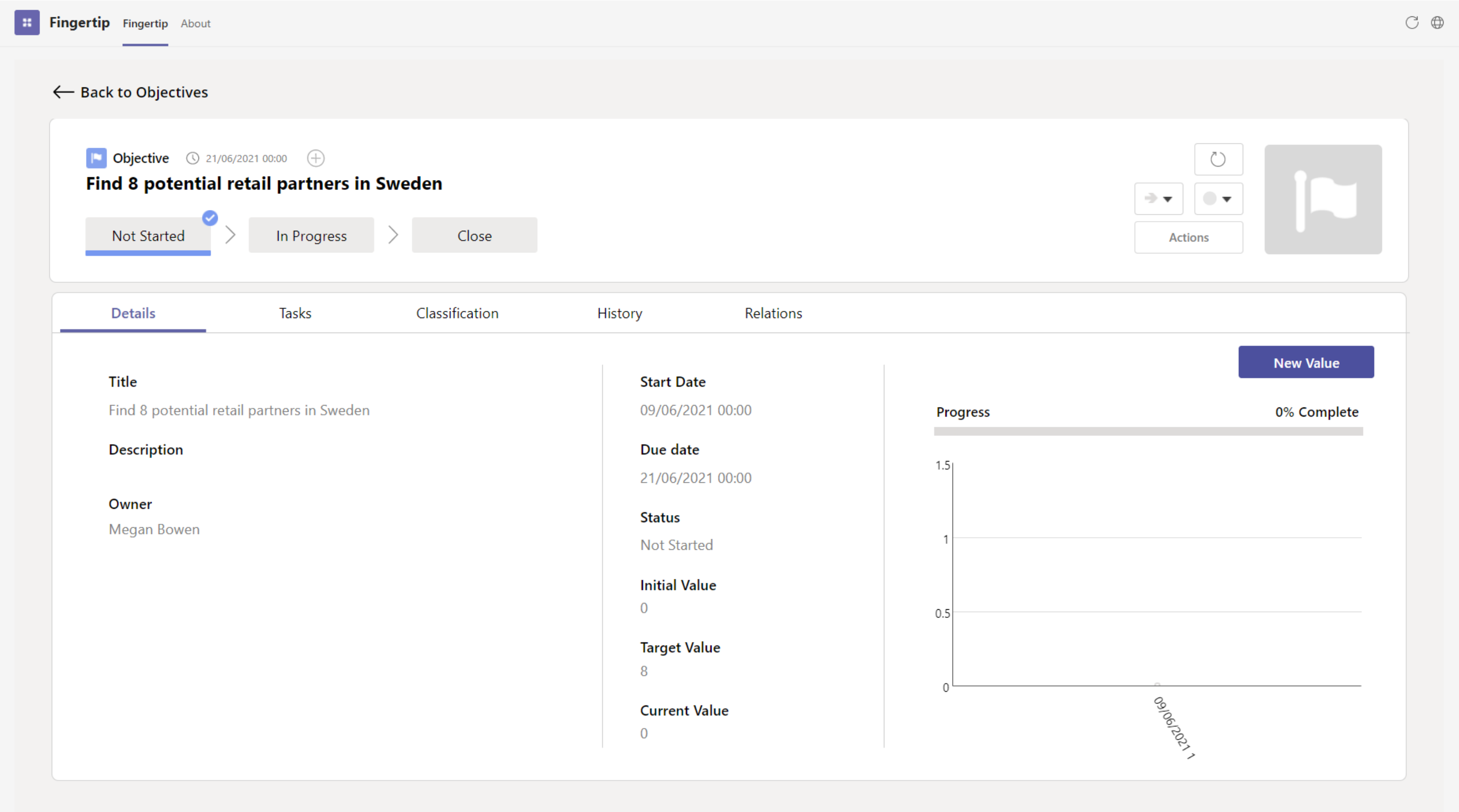
4. Objectives will be visible to everyone in the decision. To update an objectives progress, click on it to open the objective item.

How to manage objectives in a decision



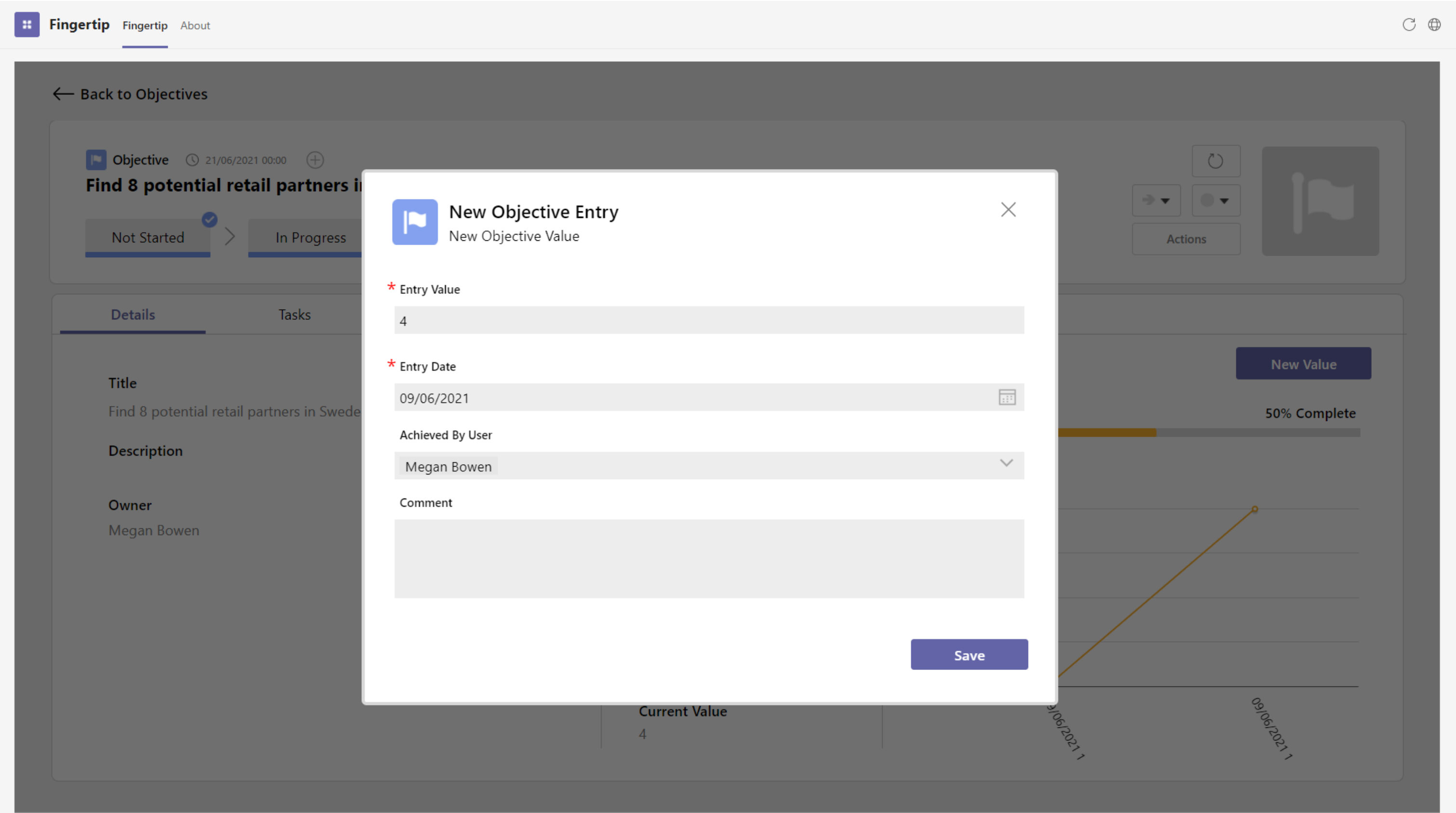
5. Update the objectives status by clicking on the separate stages in the life cycle.

How to manage objectives in a decision



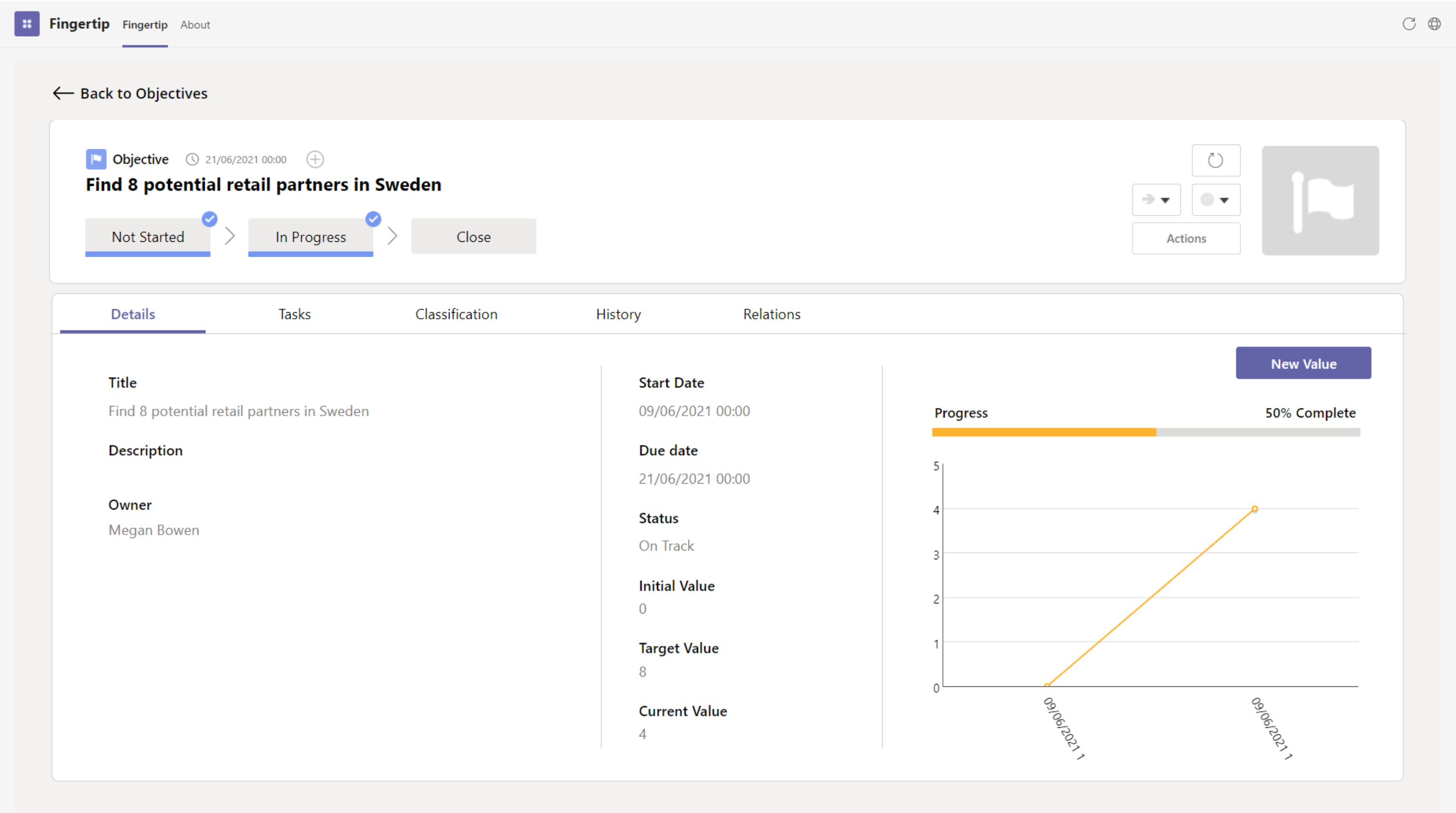
6. To update the objective value, click on "New value"

How to manage objectives in a decision

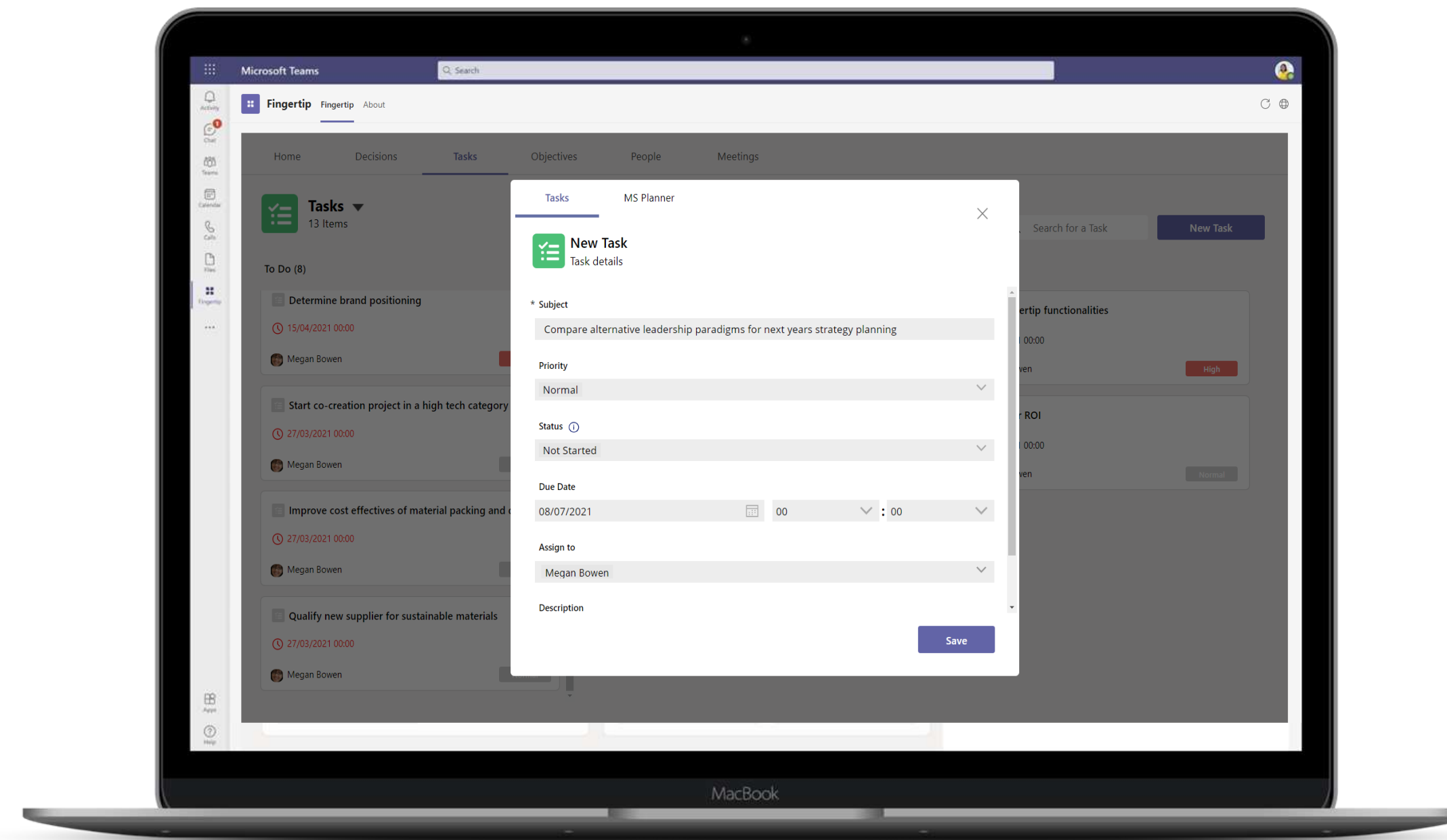


7. Enter the updated value for the objective, as well as the date it was achieved on

How to manage objectives in a decision

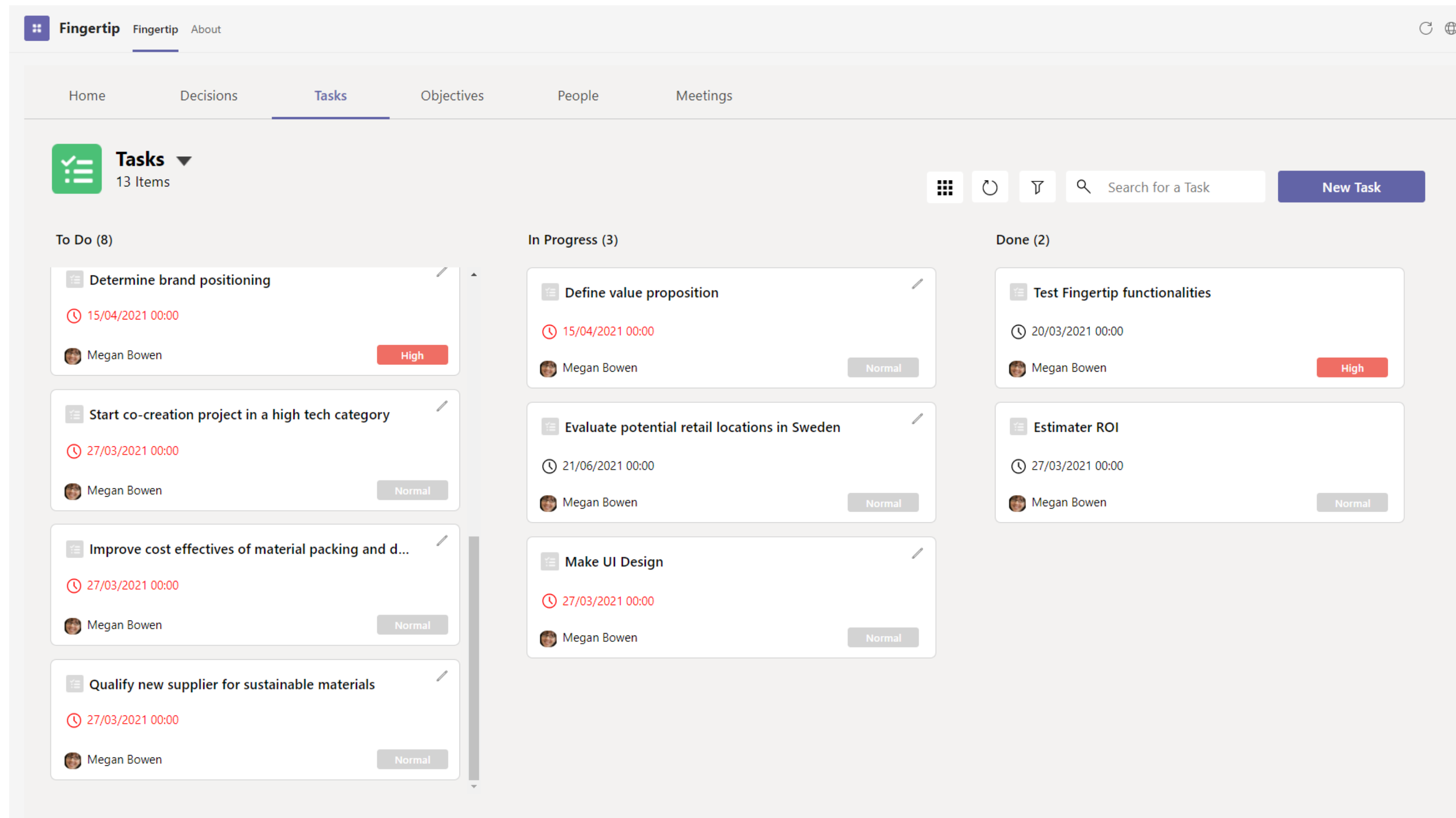


8. Done! The chart will visualize your objective process over time.



How to create a task

How to create a task



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

How to create a task

The screenshot displays the Fingertip application interface. At the top, there's a navigation bar with 'Fingertip' and 'About' links. Below it, a secondary navigation bar includes 'Home', 'Decisions', 'Tasks' (which is highlighted), 'Objectives', 'People', and 'Meetings'. On the left side, a 'Tasks' sidebar shows '13 Items' and a 'To Do (8)' list. The main content area is partially obscured by a 'New Task' modal window. This modal has a title bar with 'Tasks' and 'MS Planner' tabs. The form fields within the modal are: 'Subject' (with a required asterisk) containing 'Compare alternative leadership paradigms for next years strategy planning'; 'Priority' set to 'Normal'; 'Status' set to 'Not Started'; 'Due Date' set to '08/07/2021' with time set to '00:00'; 'Assign to' set to 'Megan Bowen'; and a 'Description' field. A 'Save' button is located at the bottom right of the modal.

New Task
Task details

* Subject
Compare alternative leadership paradigms for next years strategy planning

Priority
Normal

Status
Not Started

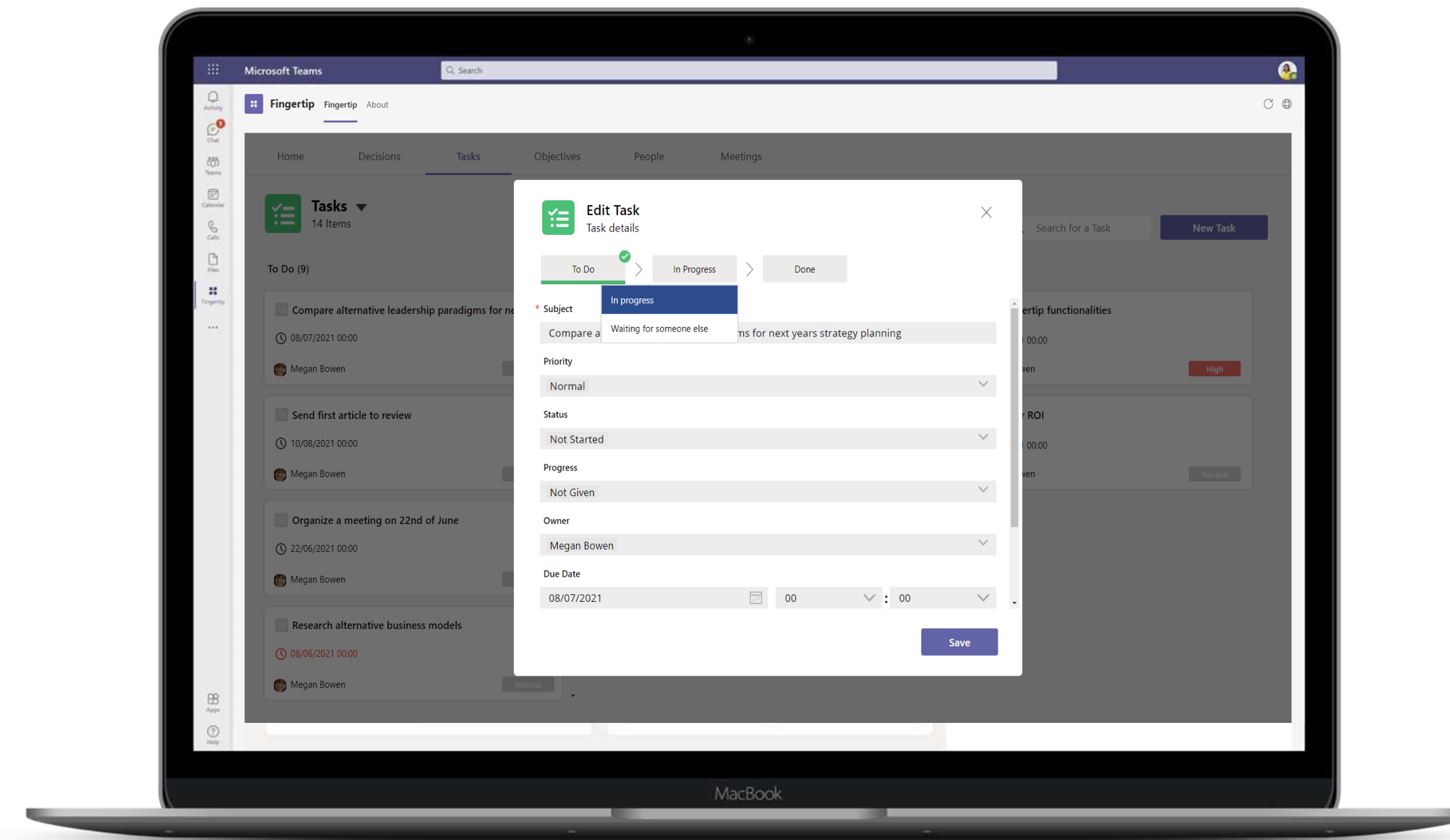
Due Date
08/07/2021 00:00

Assign to
Megan Bowen

Description

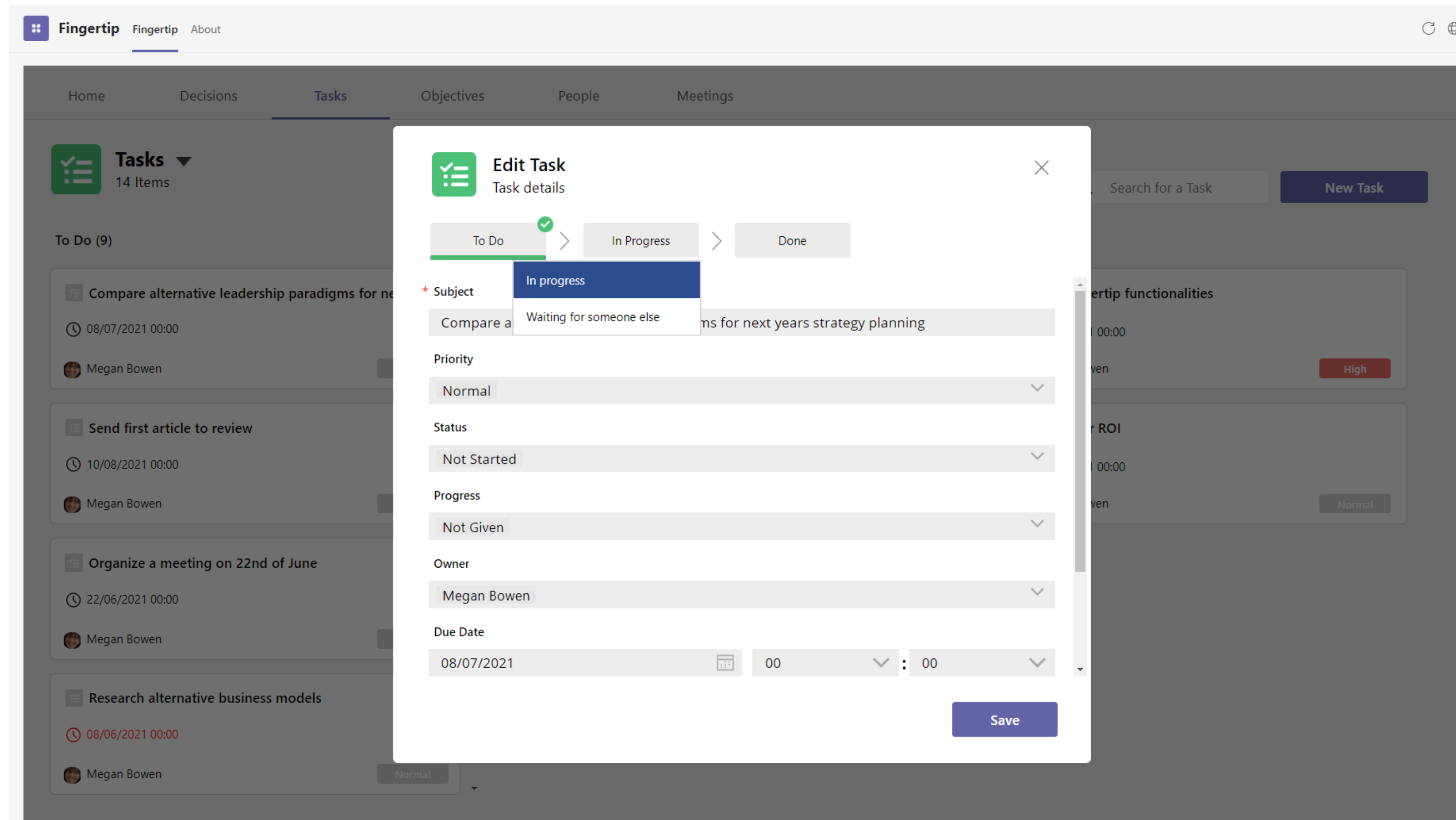
Save

2. Submit the required details:
Subject, task owner and due date.
3. Click "Create" and you're done!



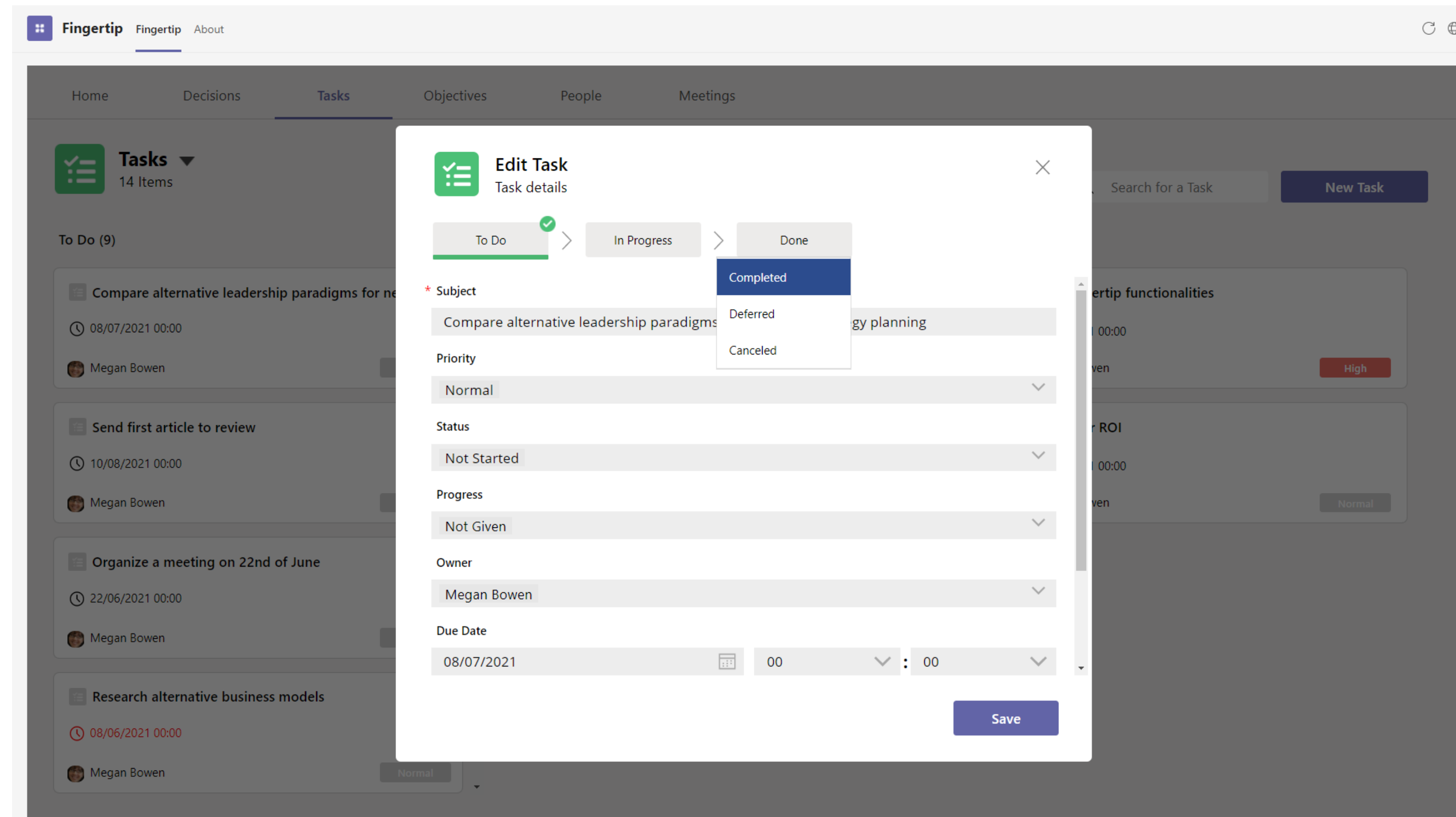
How to update a task

How to update a task



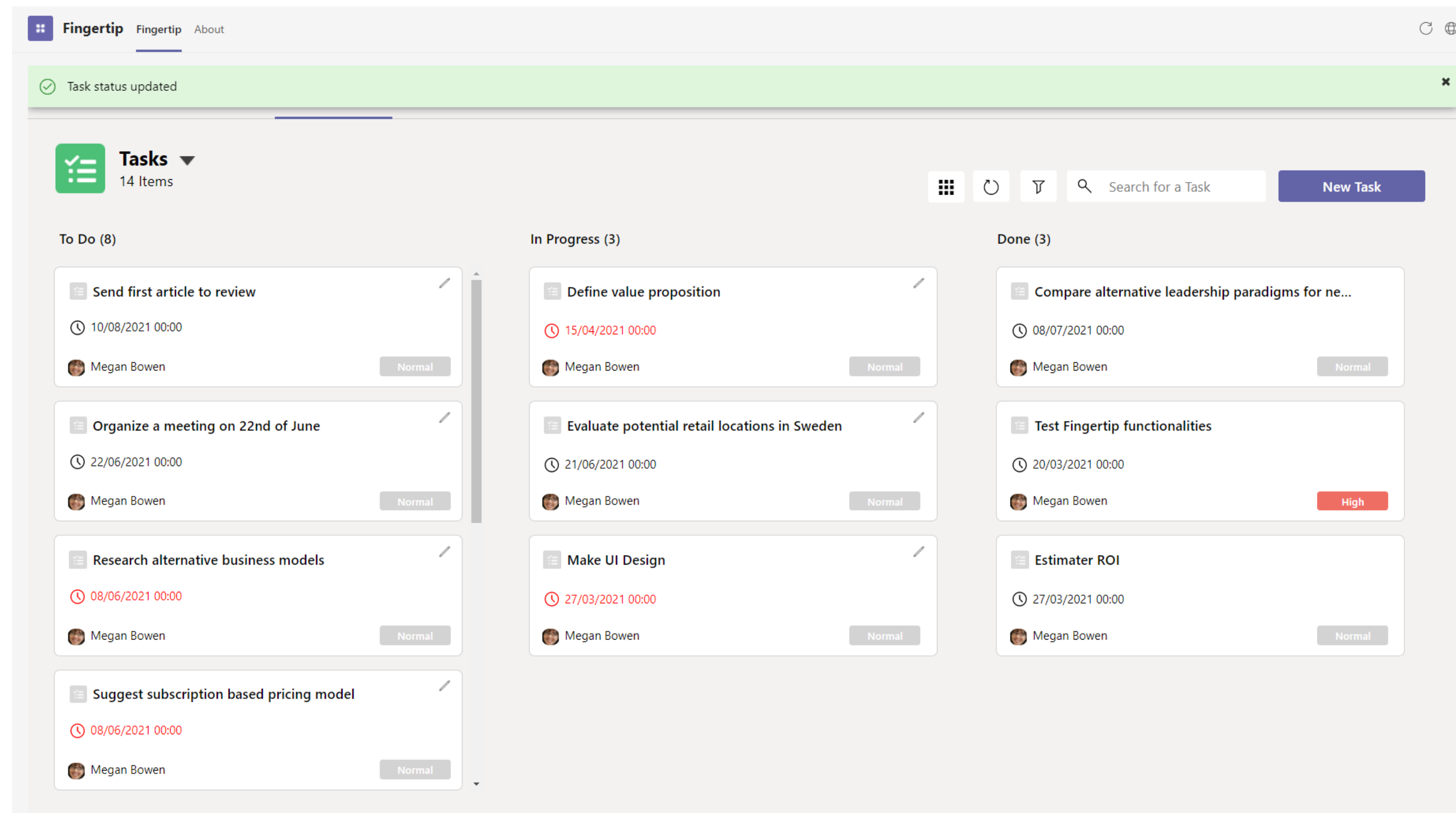
1. Open a task you want to update from the Kanban view in the Tasks tab.
2. Click on another stage on the life cycle, and select if the task is being done by you, or if **you're** waiting on someone else.

How to update a task

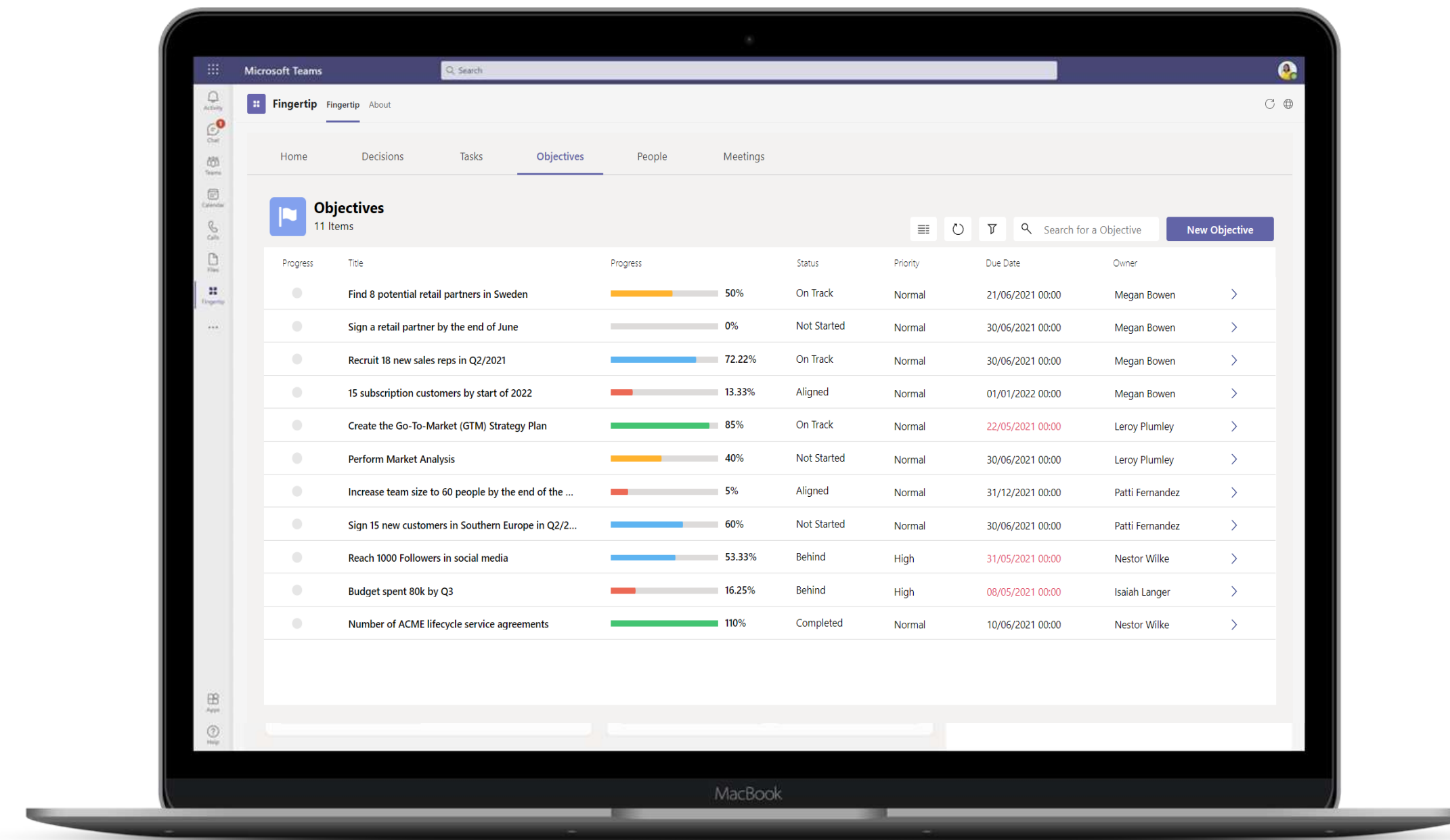


3. To complete a task, open it and click on the "Done" stage, and select if the task was completed, deferred or canceled.

How to update a task



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



How to create an objective

How to create an objective

FingertipFingertipAbout

HomeDecisionsTasksObjectivesPeopleMeetings

Objectives

11 Items

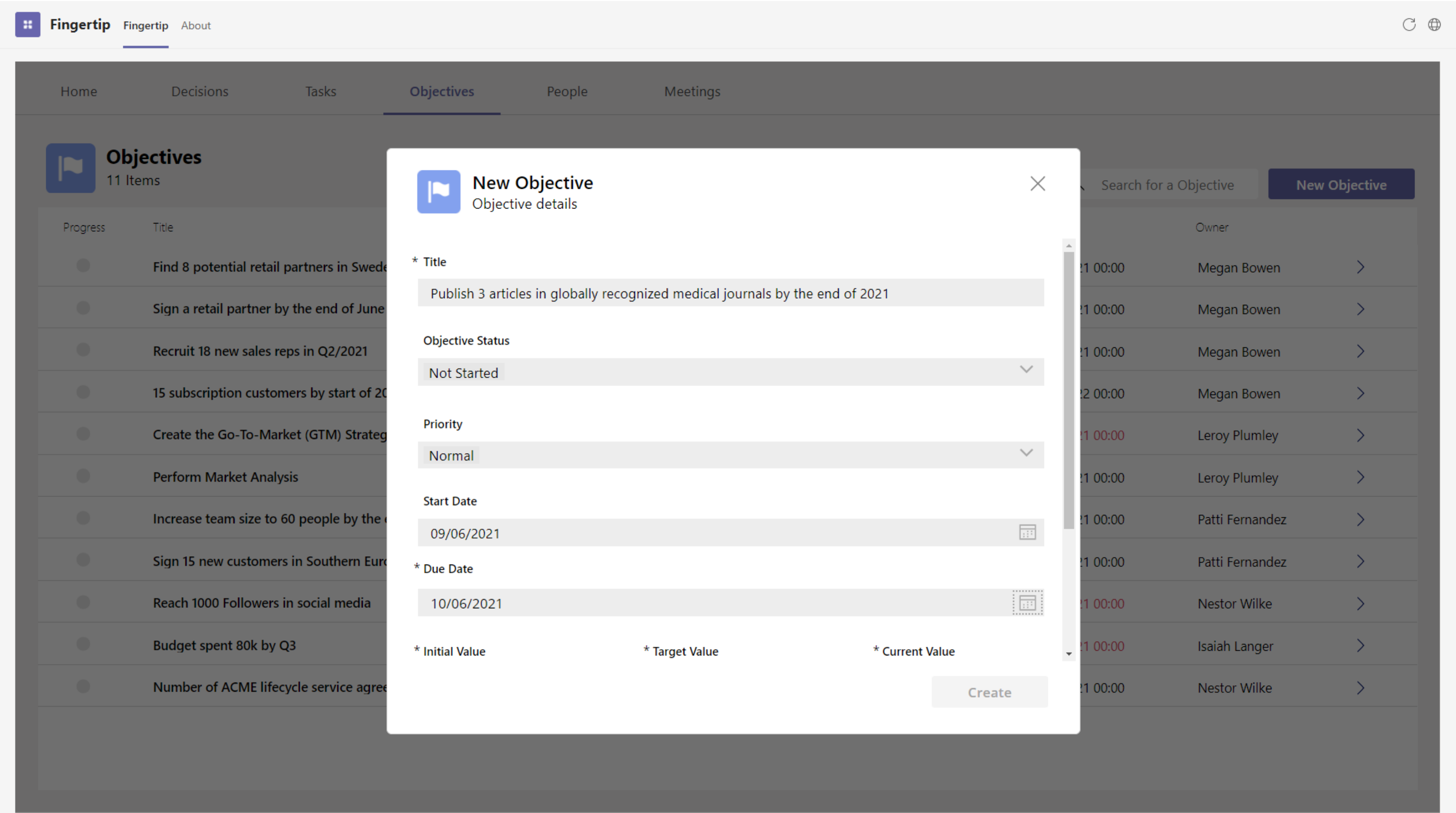
Search for a Objective

New Objective

Progress	Title	Progress	Status	Priority	Due Date	Owner	
<div></div>	Find 8 potential retail partners in Sweden	<div><div></div></div> 50%	On Track	Normal	21/06/2021 00:00	Megan Bowen	>
<div></div>	Sign a retail partner by the end of June	<div><div></div></div> 0%	Not Started	Normal	30/06/2021 00:00	Megan Bowen	>
<div></div>	Recruit 18 new sales reps in Q2/2021	<div><div></div></div> 72.22%	On Track	Normal	30/06/2021 00:00	Megan Bowen	>
<div></div>	15 subscription customers by start of 2022	<div><div></div></div> 13.33%	Aligned	Normal	01/01/2022 00:00	Megan Bowen	>
<div></div>	Create the Go-To-Market (GTM) Strategy Plan	<div><div></div></div> 85%	On Track	Normal	22/05/2021 00:00	Leroy Plumley	>
<div></div>	Perform Market Analysis	<div><div></div></div> 40%	Not Started	Normal	30/06/2021 00:00	Leroy Plumley	>
<div></div>	Increase team size to 60 people by the end of the ...	<div><div></div></div> 5%	Aligned	Normal	31/12/2021 00:00	Patti Fernandez	>
<div></div>	Sign 15 new customers in Southern Europe in Q2/2...	<div><div></div></div> 60%	Not Started	Normal	30/06/2021 00:00	Patti Fernandez	>
<div></div>	Reach 1000 Followers in social media	<div><div></div></div> 53.33%	Behind	High	31/05/2021 00:00	Nestor Wilke	>
<div></div>	Budget spent 80k by Q3	<div><div></div></div> 16.25%	Behind	High	08/05/2021 00:00	Isaiah Langer	>
<div></div>	Number of ACME lifecycle service agreements	<div><div></div></div> 110%	Completed	Normal	10/06/2021 00:00	Nestor Wilke	>

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.

How to create an objective

Fingertip

Fingertip

About

Home

Decisions

Tasks

Objectives

People

Meetings

Objectives

11 Items

Progress

Title

Find 8 potential retail partners in Sweden

Sign a retail partner by the end of June

Recruit 18 new sales reps in Q2/2021

15 subscription customers by start of 2021

Create the Go-To-Market (GTM) Strategy

Perform Market Analysis

Increase team size to 60 people by the end of 2021

Sign 15 new customers in Southern Europe

Reach 1000 Followers in social media

Budget spent 80k by Q3

Number of ACME lifecycle service agreements

New Objective

Objective details

Priority

Normal

Start Date

01/06/2021

* Due Date

31/12/2021

* Initial Value

0

* Target Value

3

* Current Value

0

Description

Create

Search for a Objective

New Objective

Owner

1 00:00

Megan Bowen

1 00:00

Megan Bowen

1 00:00

Megan Bowen

2 00:00

Megan Bowen

1 00:00

Leroy Plumley

1 00:00

Leroy Plumley

1 00:00

Patti Fernandez

1 00:00

Patti Fernandez

1 00:00

Nestor Wilke

1 00:00

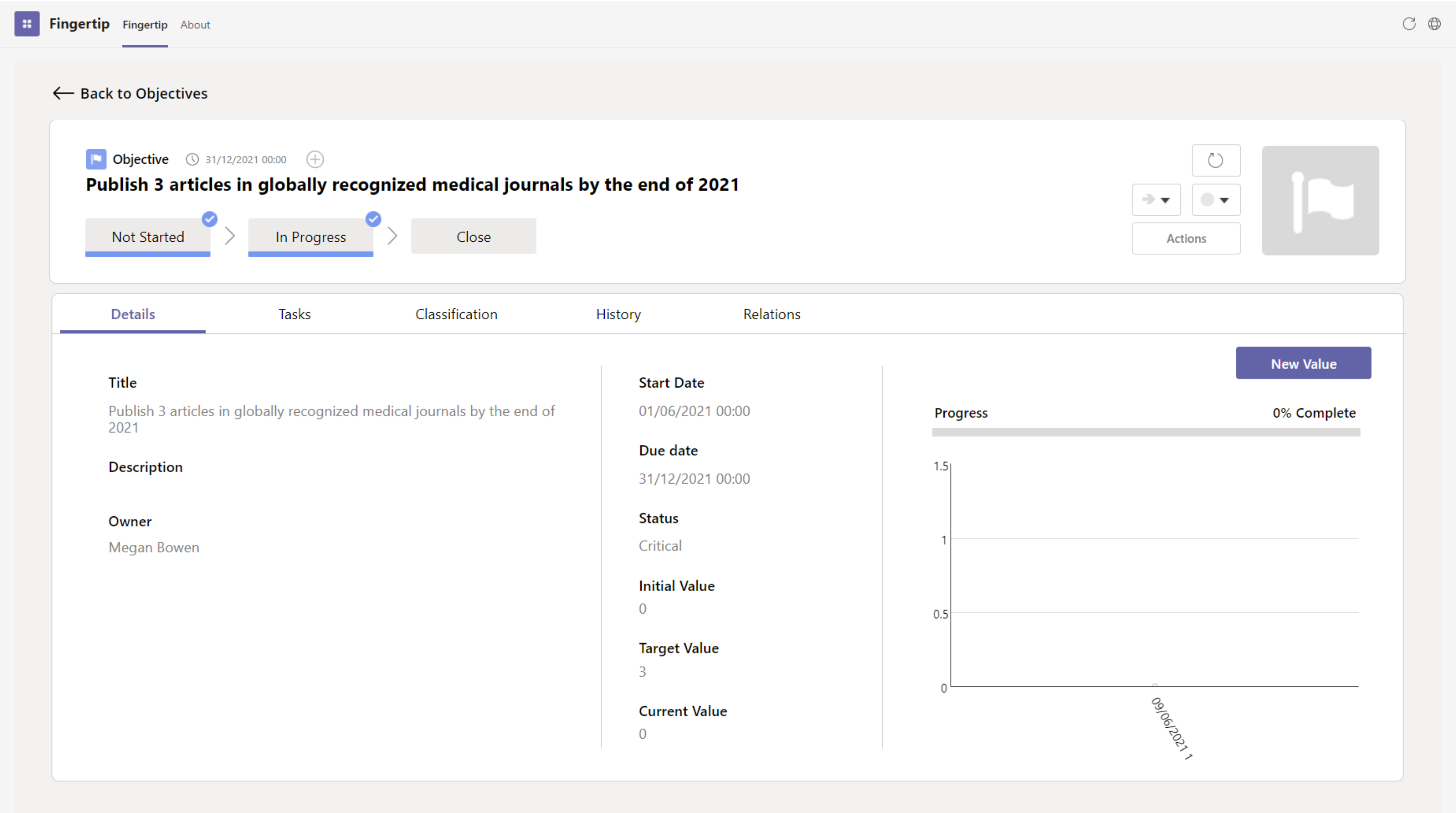
Isaiah Langer

1 00:00

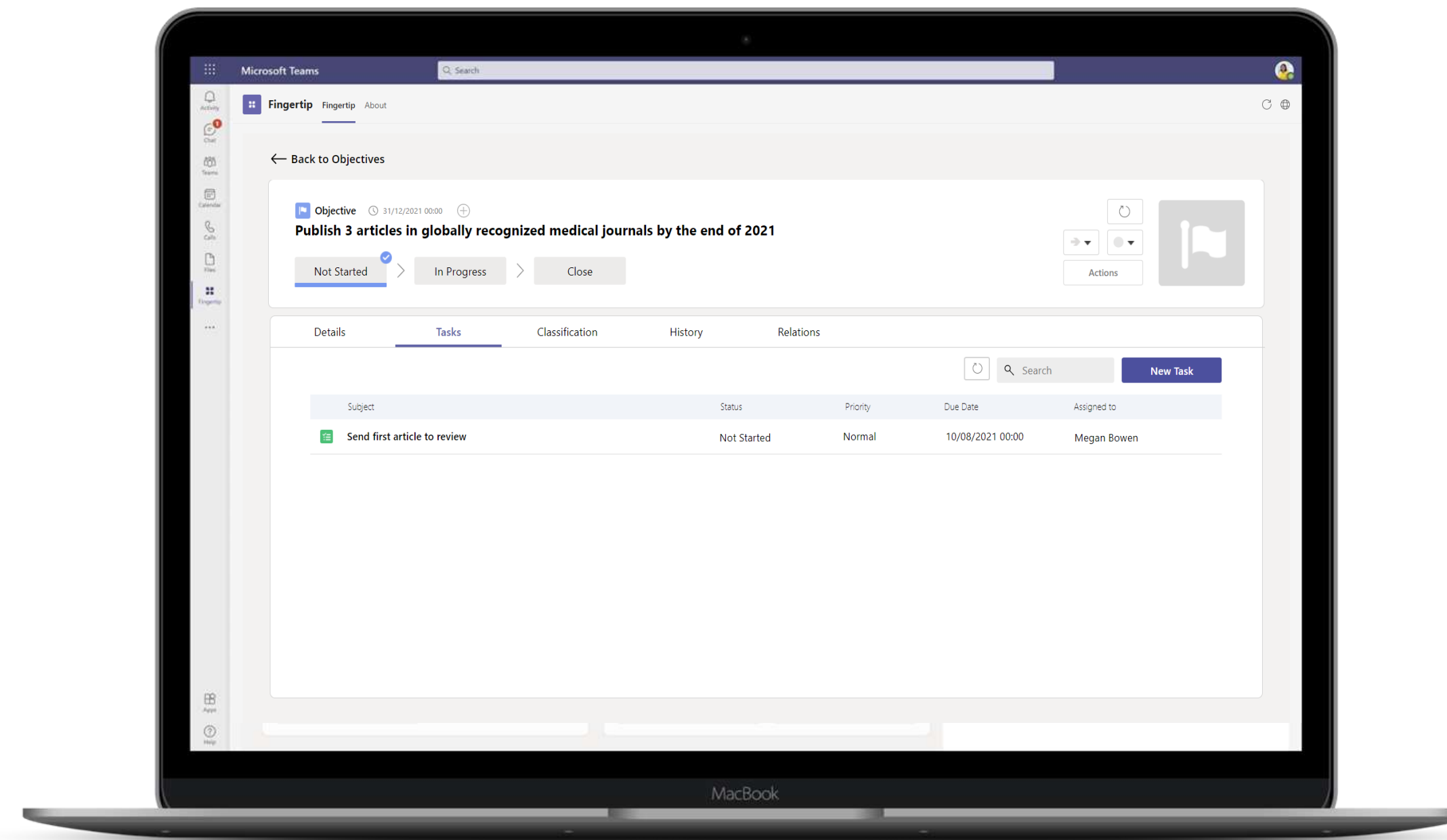
Nestor Wilke

2. Insert the required inputs: Title, start date, due date, initial value, target value and current value.

How to create an objective

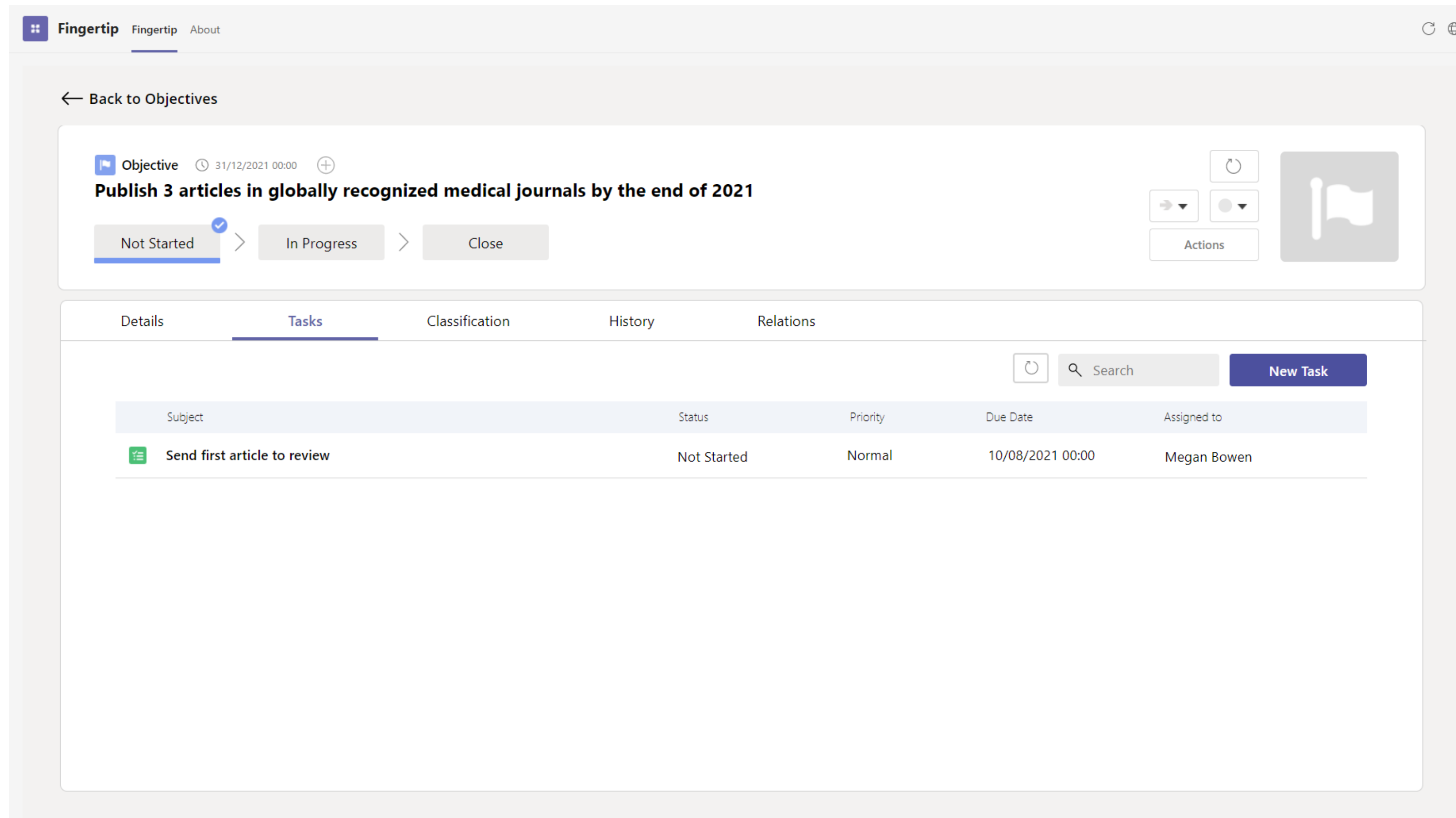


3. Done! Remember to update the objective value to let people know how **you're** progressing.



How to manage tasks in an objective

How to manage tasks in an objective



The screenshot displays the Fingertip web application interface. At the top, there is a navigation bar with the Fingertip logo and links for 'Fingertip' and 'About'. Below this, a 'Back to Objectives' link is visible. The main content area shows an objective titled 'Publish 3 articles in globally recognized medical journals by the end of 2021'. The objective is currently in the 'Not Started' status, with 'In Progress' and 'Close' options available. A 'New Task' button is located in the top right corner of the objective view. Below the objective title, there is a tabbed interface with 'Details', 'Tasks', 'Classification', 'History', and 'Relations' tabs. The 'Tasks' tab is active, showing a table of tasks. The table has columns for Subject, Status, Priority, Due Date, and Assigned to. One task is listed: 'Send first article to review' with a status of 'Not Started', priority of 'Normal', due date of '10/08/2021 00:00', and assigned to 'Megan Bowen'.

← Back to Objectives

Objective 31/12/2021 00:00

Publish 3 articles in globally recognized medical journals by the end of 2021

Not Started In Progress Close

Details Tasks Classification History Relations

Search New Task

Subject	Status	Priority	Due Date	Assigned to
Send first article to review	Not Started	Normal	10/08/2021 00:00	Megan Bowen

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

The screenshot shows the Fingertip web application interface. At the top, there's a navigation bar with the Fingertip logo and links for 'Fingertip' and 'About'. Below this, a 'Back to Objectives' link is visible. The main content area displays an 'Objective' titled 'Publish 3 articles in globally recog...' with a due date of '31/12/2021 00:00'. There are two status tabs: 'Not Started' (selected) and 'In Progress'. Below the tabs, there's a 'Details' section with a 'Subject' field. A 'New Task' modal is open in the center, allowing users to create a new task. The modal has a title 'New Task' and a subtitle 'Task Details'. It contains several fields: 'Subject' (text input), 'Priority' (dropdown menu), 'Status' (dropdown menu), 'Due Date' (date and time picker), 'Assign to' (dropdown menu), and 'Description' (text area). A 'Save' button is located at the bottom right of the modal. The background is slightly dimmed to highlight the modal.

← Back to Objectives

Objective 31/12/2021 00:00

Publish 3 articles in globally recog

Not Started In Progress

Details Tasks

Subject

New Task
Task Details

* Subject

Send first article to review

Priority

Normal

Status ⓘ

Not Started

Due Date

29/07/2021 12 : 00

* Assign to

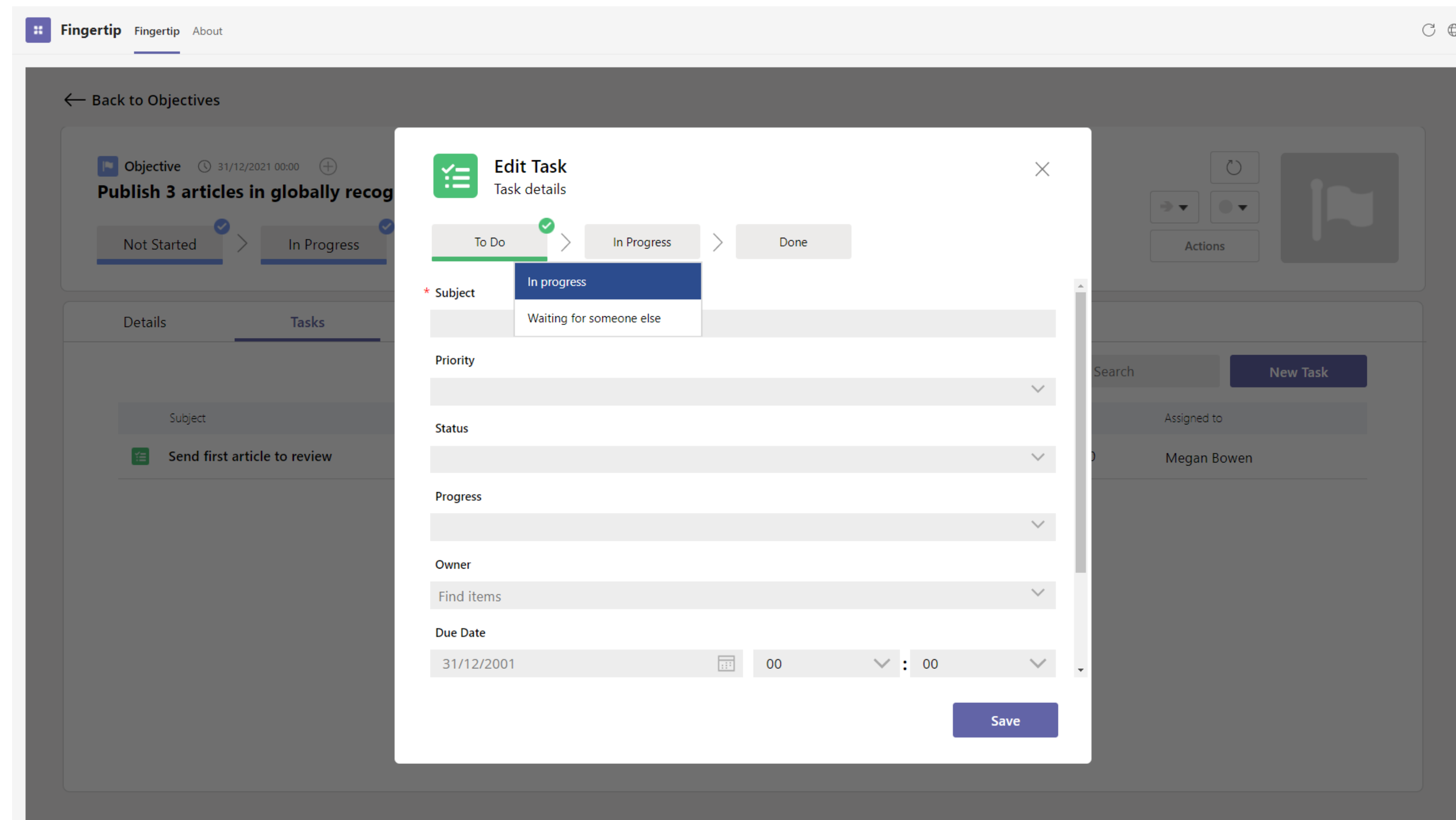
Megan Bowen

Description

Save

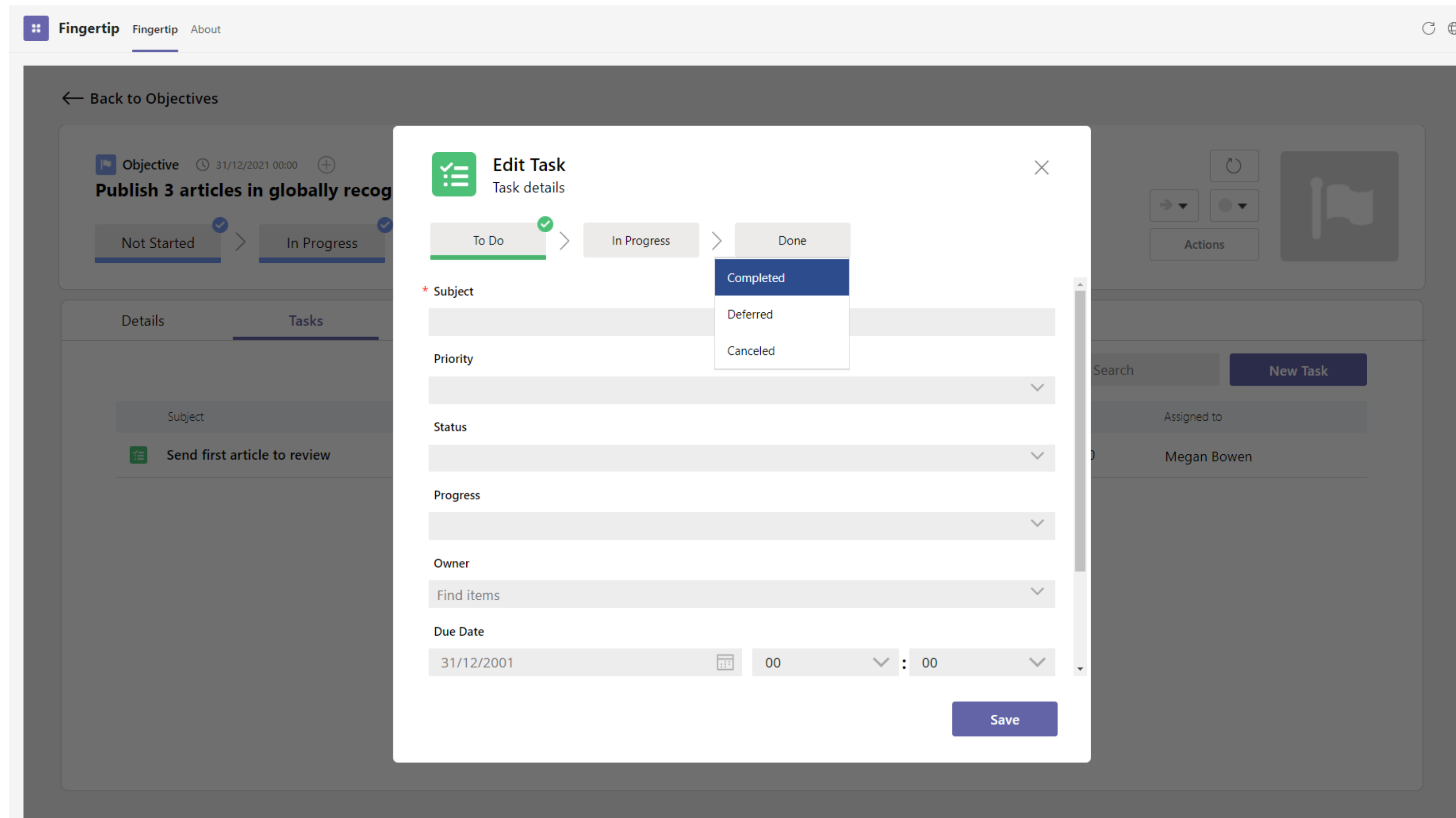
2. Create an actionable task, set a due date, priority and assignee, and click save. Any additional details may be written to the description box.

How to manage tasks in an objective

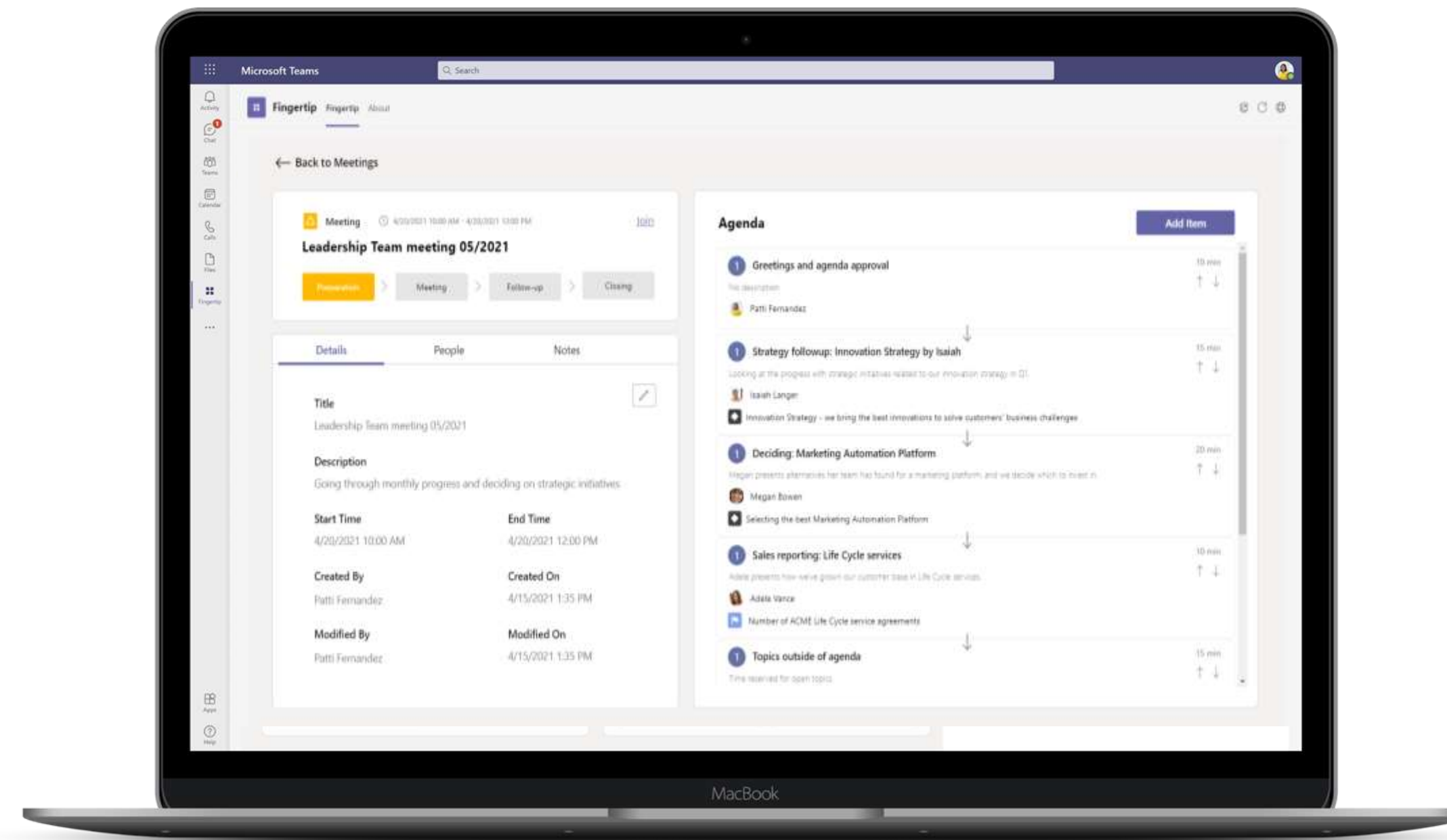


3. To update task status, just click on the task in the list and select a stage from the popup. Your task status will be instantly visible to everyone!

How to manage tasks in an objective

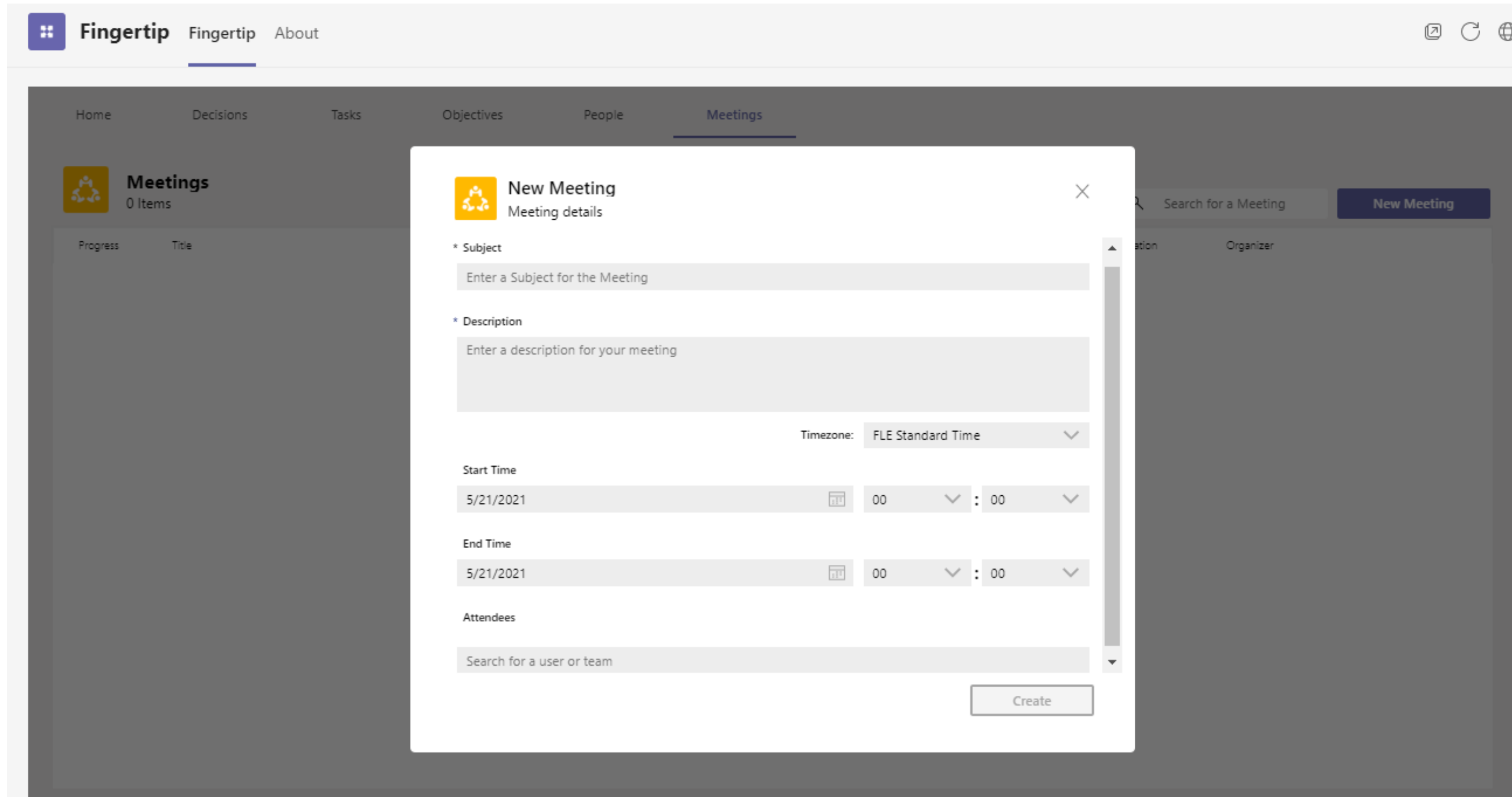


4. To update task status, just click on the task in the list and select a stage from the popup. Your task status will be instantly visible to everyone!



How to create a meeting

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



The screenshot shows the Fingertip application interface with the 'Meetings' tab selected. A 'New Meeting' dialog box is open, displaying the following fields:

- Subject:** A text input field with the placeholder 'Enter a Subject for the Meeting'.
- Description:** A text input field with the placeholder 'Enter a description for your meeting'.
- Timezone:** A dropdown menu currently set to 'FLE Standard Time'.
- Start Time:** A date and time selector showing '5/21/2021' at '00:00'.
- End Time:** A date and time selector showing '5/21/2021' at '00:00'.
- Attendees:** A text input field with the placeholder 'Search for a user or team'.
- Create:** A button at the bottom right of the dialog.

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, and attendees as individuals or teams

Create agenda items and relate business objects

The screenshot displays the Fingertip application interface. At the top, there is a navigation bar with the Fingertip logo and links to 'Fingertip' and 'About'. Below this, a sidebar on the left shows a 'Meeting' section with a 'Quality Review Call' and a 'Preparation' tab. The main content area is partially obscured by a modal window titled 'New Agenda Item'. This modal contains the following fields and controls:

- Title:** A text input field with the placeholder 'Enter a title for the agenda item'.
- Description:** A text input field with the placeholder 'Enter a description for the agenda item'.
- Relate a Business Object:** A section with two dropdown menus. The first is set to 'Decisions' and the second is set to 'Find Objectives'. A 'New Item' button is located to the right of these dropdowns.
- Duration:** Two dropdown menus for 'hour(s)' and 'minute(s)', both set to '00'.
- Assigned To:** A search input field with a magnifying glass icon.
- Add:** A blue button at the bottom right of the modal.

In the background, an 'Add Item' button is visible on the right side of the meeting details panel.

3. Add agenda items by clicking on the "Add Item" button in the meeting.

4. Enter title for an agenda item, description, relate it to other Fingertip items, select a duration and speaker and click "Add"

Build the agenda for the meeting and sent the calendar invite

Fingertip

Fingertip

About

← Back to Meetings

Meeting

🕒

4/20/2021 10:00 AM - 4/20/2021 12:00 PM

Join

Leadership Team meeting 05/2021

Preparation

Meeting

Follow-up

Closing

Details

People

Notes

Title

Leadership Team meeting 05/2021

Description

Going through monthly progress and deciding on strategic initiatives

Start Time

4/20/2021 10:00 AM

End Time

4/20/2021 12:00 PM

Created By

Patti Fernandez

Created On

4/15/2021 1:35 PM

Modified By

Patti Fernandez

Modified On

4/15/2021 1:35 PM

Agenda

Add Item

1

Greetings and agenda approval

No description

Patti Fernandez

10 min

↑

↓

↓

1

Strategy followup: Innovation Strategy by Isaiah

Looking at the progress with strategic initiatives related to our innovation strategy in Q1.

Isaiah Langer

Innovation Strategy - we bring the best innovations to solve customers' business challenges

15 min

↑

↓

↓

1

Deciding: Marketing Automation Platform

Megan presents alternatives her team has found for a marketing platform, and we decide which to invest in.

Megan Bowen

Selecting the best Marketing Automation Platform

20 min

↑

↓

↓

1

Sales reporting: Life Cycle services

Adele presents how we've grown our customer base in Life Cycle services.

Adele Vance

Number of ACME Life Cycle service agreements

10 min

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1

Topics outside of agenda

Time reserved for open topics

15 min

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5. All participants can collaborate in adding and editing the agenda items to collaborate also before and after the meeting.

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