



FairShares Planner Manual

A web application for groups to
collaboratively develop a FairShares plan
in FairShares Labs, Hubs and Learning

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Final Draft – 8th Oct 2019



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Table of Contents

Requirements	1
Installation	1
Introduction	2
The FairShares Platform - Role	2
Login	2
The FairShares Planner	2
Graphic interface of the Questionnaire	3
Header.....	3
Content.....	3
Footer.....	3
Project overview.....	4
Figure 1 – FairShares Planner Project Overview	4
Using the FairShares Planner.....	4
Viewing the Questionnaire.....	5
The structure of the questionnaire (FairShares Canvass)	5
Figure 2 – Role Related Tabs in the FairShares Planner Questionnaire	5
Contributing to the Questionnaire	5
General read and write permissions.....	6
Response / Discussion Area	6
Figure 3 – Giving Answer and Adding Discussions	6
Reading and entering answers.....	6
Discussion/comment section.....	6
Answers History.....	7
Evaluation area.....	7
Figure 4 – Toggling the Evaluation on and off	7
Figure 5 – Evaluating a question answer	8
Evaluation (of the current question set)	8
Figure 6 – Evaluating all questions related to a stakeholder role.....	9
Total Evaluation.....	9
Figure 7 – Total Evaluation of a Project	9

FairShares Plan PDF9
 Display of the current plan PDF 10
 Creating a new plan PDF 10
Best Practices 10
FAQ and Troubleshooting 11

Requirements

The FairShares Planner is a JavaScript-based web application that runs in the browser under all current operating systems. The application supports all modern desktop and smartphone browsers, including Microsoft Edge®, except for Internet Explorer® Microsoft.

Microsoft's Internet Explorer® is **not** supported by the FairShares Planner because the browser is no longer updated by the manufacturer to HTML5 and does not support newer javascript versions that the FairShares Planner requires.

Installation

The FairShares Planner is a web application. Therefore, unlike a desktop application such as Windows PC, a smartphone app for Android or iOS, installation is **not** required. New versions of the FairShares Planner are automatically deployed when the web application is called. The current version of the application can be viewed via the **Information** link in the application's page footer.


Introduction

The **FairShares Planner** (planner) is a web application that is part of the **FairShares Platform** (platform) which can be used by FairShares Hubs, Labs and other FairShares-oriented learning groups to jointly develop a **FairShares Plan** during a project to create a multi-stakeholder co-operative enterprise.

The FairShares Platform - Role

The platform is responsible for registering people as well as creating, managing and assigning projects to each FairShares Lab. The planner provides each project and its registered persons with a common questionnaire - essentially an electronic version of the FairShares Canvass - with predefined questions. Each project has only one questionnaire associated with it and the current state of the questionnaire is stored in the planner database whenever a new version of the plan is released as a PDF report.

Login

To use the planner, a person must log into the platform beforehand. In this way, the planner receives data from the platform that enables it to process and prepare the questionnaire. A scheduler takes over each session when a person registered on the platform opens a questionnaire. If a user logs out (using the  Logout option at the bottom of the questionnaire), the user will log off **both** the planner and the platform. The browser then automatically redirects the user back to the login page of the platform.

The FairShares Planner

The planner can be reached by a person registered on the platform in two ways:

- Click on the link **Go to the questionnaire** underneath the title of a project in the project list (**My Projects**). The user will be taken directly to the the FairShares Planner and display the project's questionnaire.
- If you have already opened the detailed view of a project, press the **Go to FairShares Planner** button immediately above the list of project members. To view the project's current PDF report, click on the **Project Plan PDF button**. The PDF will load into a new browser window.

Graphic interface of the Questionnaire

Assuming you have opened the questionnaire for a project, the graphical interface of the planner is divided into a header, content area and footer.

Header

The header consists of the FairShares Planner logo and language selection. Above the questionnaire, you will see the title of the project as well as a **reload** button. If you click the **reload** button, the contents of the questionnaire will be updated with changes made by other users. If you click the FairShares Planner logo, you will be taken (back) to a list of your projects from where you can open other questionnaires in your list of projects.

Content

In the middle of the page, you will see tabs (related to each of the stakeholders in a FairShares project) and some of the questions in the questionnaire. Your editing rights are limited by the roles you have within the project. For example, if you are a Labour and User member, you will only be able to edit the answers on the Labour and User tabs.

Footer

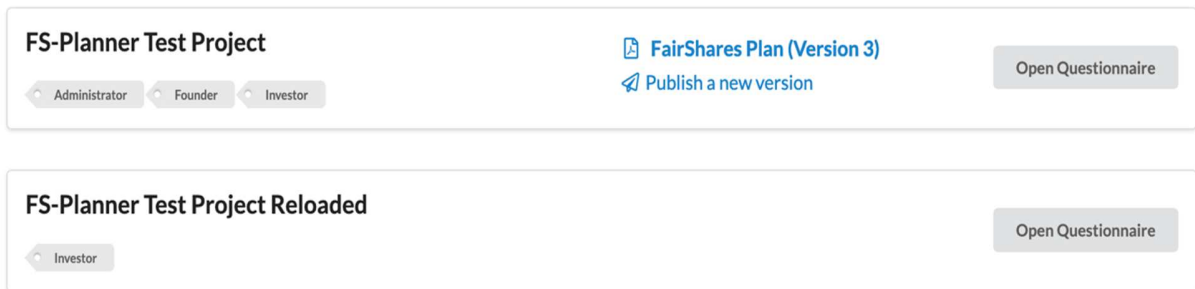
The footer contains further links which are independent of the contents of the project overview or project questionnaire:

- **Projects:** This link takes you back to the planner's project overview. It has the same effect as clicking the FairShares Planner logo at the top left of the page.
- **Imprint (Site notice):** Opens a new browser page and displays the imprint (information about the creator of the FairShares platform) and a legal disclaimer.
- **Information:** Displays the current version of the FairShares Planner.
- **Logout:** This ends the current session of the scheduler and the platform. The browser automatically redirects the user to the Login page of the platform.
- **FairShares Lab Logo and Erasmus+ Logo:** Clicking these logos takes the user to the websites of FairShares Labs project and Erasmus+ programme.

Project overview

In the content area of the project overview (**Projects - Projects**) lists all projects that are associated with you, i.e. projects that you have created as an administrator yourself or on which they participate.

Figure 1 – FairShares Planner Project Overview



Underneath each project title, there is a list of the roles that you have in the project. The **Open Questionnaire** button (on the right-hand side) takes you to the questionnaire (FairShares Canvass) of that project. If a FairShares Plan has been published as a PDF, a link to it (e.g. **FairShares Plan (Version 3)**) is displayed to the left of the **Open Questionnaire** button.

The **Administrator** role is assigned to you if you *created* the project. As administrator, you can create a new version of a FairShares Plan PDF at any time using the **Publish a new version** button. The new version will replace the previous version. All members of the project can access the PDF.

Using the FairShares Planner

If you are interested in answers already given by other people in the project and a FairShares Plan PDF has already been created, you can click the link to view the answers in the last published version. However, these responses are only a snapshot of the last published version and may not contain the most up to date responses to each question.

To view the latest responses, click directly on the **Open Questionnaire** button. The questionnaire is loaded for the selected project. You can see the posts and responses that are not displayed in the PDF. To view discussions and update answers (if you have permission), it is necessary to edit questions in the questionnaire.

Viewing the Questionnaire

The structure of the questionnaire (FairShares Canvass)

Questions are grouped by role to provide a better overview for each stakeholder in the project. Each role has its own tab or button, which provides a summary of the questions related specifically to the role.

Questions for administrators are listed under two other tabs:

- **Purpose** – containing questions that are usually answered at the start of a project
- **Final Questions** – containing questions that are best answered when the rest of the FairShares plan has been completed

Figure 2 – Role Related Tabs in the FairShares Planner Questionnaire



By default, the **Purpose** tab is selected. If you click another tab (role), the questions relevant to the selected role will be displayed. In you click the **Total Evaluation** tab, you will see a summary of all project members' evaluation of all questions in this FairShares Canvass.

Contributing to the Questionnaire

The questions listed are the same for all FairShares projects. It is not (currently) possible to change existing questions or create new ones, but there is space in 'Final Questions' to note any additional questions that you need to ask and answer for progressing to the creation of a social enterprise plan. Each question is colour-coded and is numbered so that it corresponds to [FairShares Canvass V3.0](#). The colours also correspond with those of the FairShares Canvass.

Yellow Questions – are usually asked and answered during an Ideas Workshop

Red Questions – are usually asked and answered during an Incubation Workshop

Green Questions – are usually asked and answered during Planning Workshops

Blue Questions – are usually answered by the Administrator late in the planning cycle

At the end of a question set is an indicator stating which role (stakeholder) can create or revise answers to the question.

To open a question, click it.

Once you have opened a question, there are two areas:

- **Answer / Discussion** – to input your answer or contribute to a discussion
- **Evaluation** – to assess the value of the question and indicate its alignment with FairShares values and principles.

General read and write permissions

Any person registered for a project can read all questions, answers, comments and evaluations. Anyone can create comments in the discussion area of a question. In the **Evaluation** section, each project member can make their own evaluation of the answer given to a question.

Response / Discussion Area

The **Answer / Discussion** tab underneath a question shows the current answer and any related discussion by project members.

Figure 3 – Giving Answer and Adding Discussions

The screenshot shows a question titled "How would you describe (label) members who will use / buy goods / services?" with a dropdown menu for "User". Below the question, there are two tabs: "Answer / Discussion" (selected) and "Evaluation". Under the "Answer / Discussion" tab, there is a text input field with an "Edit" button (pencil icon) below it. To the right of the input field is a "Add a comment..." text box with a "Reply" button (pencil icon) to its right.

Reading and entering answers

On the left side of the page, you can see the last answer given, plus the author and creation date. If you have a role that permits, you can change an existing answer by clicking on Edit button - [Edit](#) . If no answer has yet been given, an input field is presented into which you can write your answer. After entering or modifying an answer, click the **Save** option to store the response, or **Cancel** the change. If **Edit** [Edit](#) is greyed out (inactive), you do not have permission to write or modify the answer to this question.

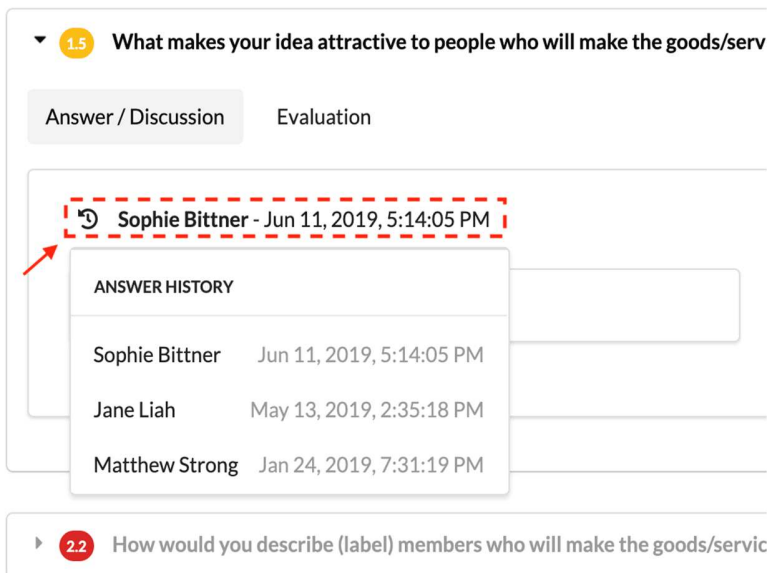
Discussion/comment section

On the right side of the page you will find the comments given by other people in the project. To add a comment, click in the box where it states "**Add a comment...**" then write your response on the question and click **Reply**. All members of the project (irrespective of role) can participate in answering discussion points. A member with the appropriate role can then read the discussion and update the answer (if required) in accordance with the agreements reached in the discussion area (or by other means, such as online or face to face discussion). The answer can then be discussed again. The process repeats iteratively until there is an overall positive evaluation of all the answers.

Answers History

The history of previously given answers is accessible by clicking on the author or the creation date above the answer field. You can click on an entry to see the previously archived response.

Figure 4 – Accessing Previous Question Answers

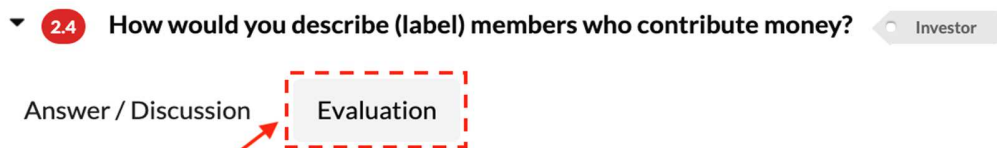


If you have the role that gives you permission to answer the question and click **Edit**, the currently selected archive answer is copied to the input field in place of the previous answer. If you save, then this becomes a new response in the history. Any change of an existing response (through direct modification or the selection of a previous response) is treated as a new answer. For example, even if only one letter is changed, the old answer is archived and the new answer appears with you as the author using the current date.

Evaluation area




The evaluation area for the current question can be toggled on and off by clicking **Evaluation**.

Figure 4 – Toggling the Evaluation on and off



The expanded evaluation area is always displayed below the answer/discussion area of the question.

Figure 5 – Evaluating a question answer

	Content-related Evaluation	FairShares Values and Principles				
Name	1,4	1	2	3	4	5
 Sophie Bittner Jun 15, 2019, 08:37:12 PM	- -	+ -	+ + -	- -	+ + -	○ -
 Jane Liah May 13, 2019, 2:37:24 PM	+	-	○	-	+ +	-
 Average (2 People)	+	○	+	-	+ +	○


In the evaluation area of the current question, you can see all the evaluations given so far, grouped by person and sorted by the evaluation date. As a currently registered person, you will be in the first row of the evaluation table. Also, the first line is the only line that can be reworked at any time. The **Content-related Evaluation** column enables you to evaluate the content of the current response on its own merits (irrespective of its impact on FairShares values and principles). What do you think of the response to this question? If you like it a lot, select two green plus signs. If you completely disagree, select two red minus signs. You can indicate support and disagreement of various strengths, or indicate neutrality by selecting the circle.

In the columns labelled **FairShares Values and Principles**, you can indicate whether the current answer is aligned with any of the FairShares principles. You need only indicate where there is alignment, or misalignment. The rating is saved automatically.

Evaluation (of the current question set)

The **Evaluation** option (beneath the **Questions** option) summarises all members' evaluation of questions related to the current role and presents the results. Results are grouped according to people and the type of evaluation (i.e. Content-related or FairShares principles). It is not possible to edit the ratings in this section.




Figure 6 – Evaluating all questions related to a stakeholder role

Content-related Evaluation			
Name	1.4	2.1	2.6
 Paul Crown Jul 12, 2019, 10:25:45 PM	-	-	-

Total Evaluation

By clicking on the last button at the top of a project page (**Total Evaluation**), the overall result of all evaluations to the entire questionnaire are presented. The cumulative ratings on this overview page cannot be edited.

Figure 7 – Total Evaluation of a Project

Name	Content-related Evaluation						FairShares Values and Principles				
	Purpose	Founder	Labour	User	Investor	Final Questions	1	2	3	4	5
 Milo Hadwich Sep 14, 2019, 10:25:45 PM	+	-	-	-	-	-	+	○	-	+	○
 Anabel Meloni May 27, 2019, 2:37:24 PM	-	+	-	-	-	-	-	○	-	++	-
 Average (2 People)	+	+	-	-	-	-	○	○	-	+	○

FairShares Plan PDF

A FairShares Plan PDF collates the questions that have already been answered and presents them in a PDF ready for viewing or printing. The last entered answers for each question (without author and date) are transferred to the PDF. The PDF does not contain comments from the discussion area, nor does it contain the response history. It presents only the latest answer to each question.

Display of the current plan PDF

Anyone in the project can download the currently generated plan PDF via the **FairShares Plan link (version <version number>)** in the project overview.

For example, if you clicked [📄 FairShares Plan \(Version 8\)](#) it would open a browser window to display the eighth version of the FairShares Plan for the current project. Depending on your browser, you will be asked if you want to download or view the file. Some browsers open the plan PDF in a new tab or download it automatically to a Downloads folder where you view or print it.

It is also possible to access the most recently generated FairShares Plans for all your projects from the FairShares Platform. To do this, click the **Project plan PDF** button from any currently displayed project.

Creating a new plan PDF

If you are the creator of the project, you have the **role Administrator**. This enables you to generate a new FairShares plan PDF based on the latest current answer to all questions. Each time you create a new PDF, the version number increases by one and the previous plan PDF is archived.

To publish a new plan, click [🚀 Publish a new version](#) in the list of your projects in the FairShares Planner (click the FairShares Planner logo to get this list). A dialog box appears for you to confirm the creation of the new PDF.

Best Practices

If you have created a project in the platform or joined a project, you can go directly to the questionnaire from the project overview page of the platform via the **Go to the Questionnaire** link of a project. From there, you can follow all the answers and the current discussions of questions that are relevant to you. If you have one or more specific roles, you can also write or customise answers to questions that are important to you. Even if you do not have the role for specific questions, you can post your own comments in the discussion area to help you develop answers.

In addition, you can use the **Evaluation** section of the respective question to inform others of your assessment of the current answer. You can view the role-specific Evaluation (underneath **Questions** on each tab denoting a role) to identify question answers that are not fully supported. You can improve or extend the answer, or add to the discussion of that question.

If you have the **administrator** role for a project and believe that the current status of the questionnaire should be versioned, create a new FairShares plan PDF from the project overview page.

All project members can get a quick overview of the answers to all questions by downloading (opening) the FairShares plan PDF.

FAQ and Troubleshooting

How can I use my own avatar for answers in the discussion area or in the Q&A?

The planner uses **Gravatar** to represent avatars: <https://en.gravatar.com/>. You can use this to set up a globally recognised avatar.

Why do I not see new messages or replies by other users?

If you are in the **Reply** or **Comment** pane and do not actively post new comments or enter replies, changes in the questionnaire by other users are not currently automatically reloaded. You can manually reload the questionnaire by clicking the **Reload** button immediately below the tool for selecting your language.

Why am I automatically logged out?

The session is maintained when the browser window is open. When the computer goes into standby or hibernation, the session cannot be renewed and will end after some time. When this happens, you will be automatically redirected to the login page of the FairShares platform and can log in again from there.

Technical Overview

FairShares-Planner

Version 0.1 (Author: Frank Wende)

Overview

The FairShares-Planner is a responsive client-server single-page (SPA) web-application based on TypeScript/JavaScript. The frontend is based on Angular 7. UI design implemented with help of Semantic UI CSS framework.

The Backend framework was implemented with LoopBack 4 using a MongoDB Database Server for application data and a Redis data store as a temporary data cache for the user data received from the FairShares-Platform to minimize subsequent platform requests.

Both frontend and backend are deployed on Amazon Web Services (AWS) cloud environment.

Frontend

Web Frameworks

Web Application Framework: Angular 7 (<https://angular.io/>)

State Container: Angular Redux 9 (<https://github.com/angular-redux>)

HTML5/CSS-Framework: Semantic UI (<https://semantic-ui.com>)

PDF-Library: pdfmake (<http://pdfmake.org/>)

Translation-Component-Library: ngx-translate 10 (<http://www.ngx-translate.com>)

Web Server

Packaged by webpack (<https://webpack.js.org/>)

Deployed on Amazon Web Services (AWS) S3

Backend

Node.js-Framework: LoopBack 4 on Alpine Linux / Docker Image: node:10.15-alpine (<https://loopback.io>)

Databases

MongoDB 4 on Ubuntu / Docker Image: mongo:4.0 (<https://www.mongodb.com/>)

Redis 5 on Alpine Linux / Docker Image: redis:5-alpine (<https://redis.io/>)

Application Server

Packaged as Docker Container on Alpine Linux based on Node.js 10

Docker Containers deployed as API Service (FARGATE launch type)

on AWS Elastic Container Service (ECS)

ECS-Instance Resources:

Task memory (MiB): 1024

Task CPU (CPUs): 0,25