RESOURCE GUIDE

Groopit Configuration Guide

groopit

Introduction

This guide is a resource to help you, the Groopit Administrator, successfully configure Groopit and get employees sharing intelligence in real-time. There are 2 main areas of configuration:

1. **Adding Groopit to your company's tech stack** (including configuring SSO and adding any Groopit connectors).
2. **Setting up Groopit** to define the real-time data employees with share.

Installing Groopit into your company's tech stack is easy to do, though it requires enlisting partners in your IT department to complete. **Most customers report that it takes less than an hour to install the Groopit connector applications.**

We recommend that you kick off this process as soon as possible to avoid delays in your deployment.

As IT is integrating Groopit into your tech stack, you can **configure Groopit and create data models** using the Groopit web app (https://app.groopit.co). It is easy to do and requires minimal technical skill.

Table of Contents

This guide is divided into chapters, to help you focus on the specific areas where you need support:

Chapters 1 – 3: focus on integrating Groopit into your existing tech stack (including configuring SSO, Teams, Slack, Outlook and Salesforce, as appropriate). These sections also include links and information to send to your IT department to give them context and instructions.

Chapters 4 -6: focus on the initial setup of your group, including resources to create data models.

Chapters 7 -10: cover configuring Groopit once the connectors have been installed.

Chapter 11: explains how to give people permissions to access Groopit.

Pre-Configuration Planning Worksheet

Identify the required Groopit connectors and who and how people will access Groopit.

SSO	Details
Identity Provider Name	
Will you be using IDP groups	
Name(s) of IDP groups to access to Groopit	

Microsoft Teams	Name	New or Existing	Channel Owner
Whole Organization Access			
Channels to access Groopit (List each separately)			

Slack	Name/Slack ID	New or Existing	Channel Owner
Whole organization: Slack ID			
Channels to access Groopit (List each)			

Salesforce	Details
Object(s) that have data to inherit	
Object(s) to connect to Groopit	

Will users be sharing or extracting data with:	Check all the apply
Outlook	
Browser Extension (Chrome/Edge browsers only)	
Mobile applications	

Who requires permissions to access Groopit	Name (individual or group)	Access point - List All (Web, Teams, Slack, Salesforce, Mobile, Outlook, Browser Extension)	Comments
Administrators:		All	
Users			

Chapter 1 | Resources to Brief your Technical Team

If your IT team is not familiar with Groopit, you may need to brief the team on your plan. You can use these resources:

Groopit Technical Overview (link)

Groopit 5-Minute Demo (link)

Chapter 2 | SSO Installation and Configuration

(to be completed by IT group)

Groopit Professional and Enterprise subscriptions give users secure access to Groopit through an identity provider via OpenID Connect (OIDC). It works by transferring the user s identity from one place (the identity provider) to another place (groopit.co), providing single sign-on (SSO). You company s IT group will need to configure the Groopit App for SSO. There is a standard procedure for installing SSO applications, which Groopit follows. Share these installation and configuration instructions for more details (link).

Chapter 3 | Install Groopit Connectors

(to be completed by IT group with application admin permissions)

Groopit connectors allow users to share real-time data from wherever they work and each can be installed in less than an hour. Application administrator permissions are required to install the Groopit app in Teams, Slack, Outlook and/or Salesforce.

To start the tech stack installation, you ll first want to identify someone with administrative privileges to the specific applications you want to connect to Groopit (SSO, Teams or Slack, Outlook and Salesforce). Depending on your company s process, that will either look like directly contacting someone in your IT department or submitting a ticket to IT to request the resources you need.

Once the connector has been installed, all additional configuration is completed by the Groopit organizer with a few taps. No additional technical skills are required.

Share the following installation and configuration instructions with the appropriate administrator. Learn more about Groopit connectors here.

Groopit App for Teams installation and configuration guide

Groopit App for Slack installation and configuration guide

Groopit Add-in for Outlook installation and configuration guide

Groopit App for Salesforce installation and configuration guide

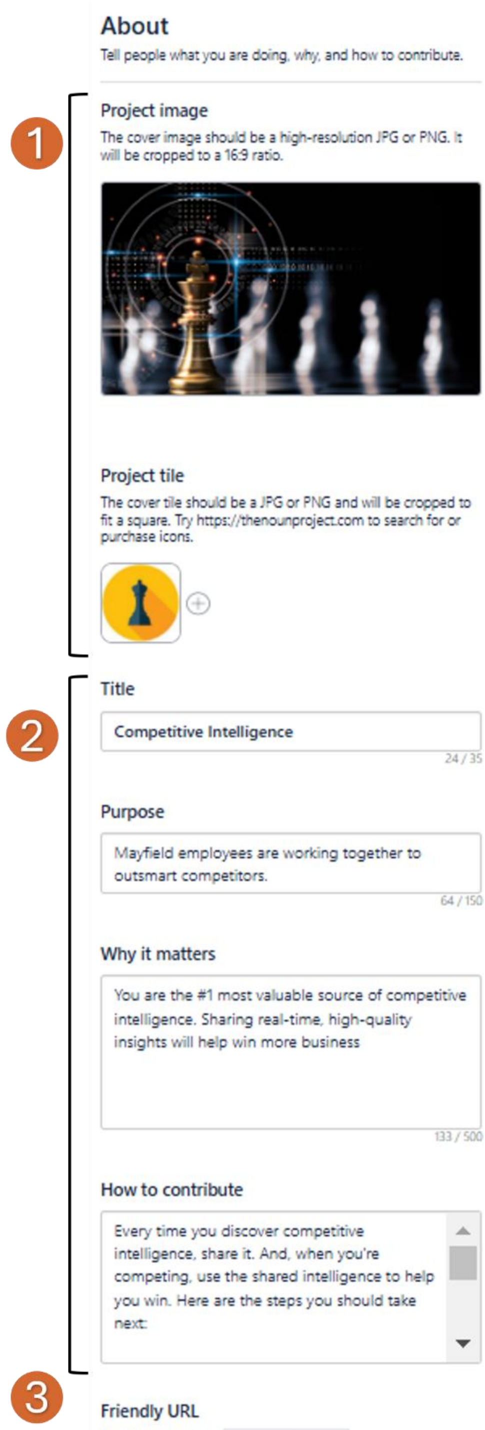
Chapter 4 | Create Data Models

Data models define the real-time data employees share and AI extracts. Data models can be set up to gather information about anything – competitors, sales, operations, product gaps, customer satisfaction, employee experience, merchandising, business reporting – the options are limitless. Data models yield a high-quality, actionable corpus of any data topic and they do it across systems and departments. For more details, the Data Model Resource Guide covers all the basics – including best practices and how they leverage artificial intelligence

Data Model Resource Guide >>>

Chapter 5 | Brand your Group

Start by customizing your group on the About page to reflect your brand and mission. It s helpful to add context for your group and its users, such as the purpose, why it matters, and how team members should share data. The About page editor provides you with the tools to edit your purpose and add visuals and other resource links to your group.



1.Add a cover image and icon: Your cover image should be a JPG or PNG that is at least 1024 x 576 pixels. It will be cropped to a 16:9 ratio. Note that the cover image is optional. For the icon, it can be any size, but it will be cropped to a square. Keep your icon clean and simple and try not to use one with lots of text so it s easy to identify.

2. Refine the text that appears on the About page. Add and adjust the purpose, why it matters, and data team members should share. You ll answer 3 questions:

A. **What is the purpose of your group?** Make a short statement about what you're doing. Try starting with "We are…"

- We are working together to…
- We are partnering to…
- We are solving…
- We are discovering…
- We are researching…

If someone were skimming the first sentence of your About page, this is what you would want them to learn.

B. **Why does it matter?** This is where you will explain why they should share data, provide more detail about the data you are trying to collect, and emphasize the importance of their contribution. Keep it concise! This section has a 500-character limit.
C. **How should people contribute?** Explain what the real-time data members will be sharing. These should explain the 3-4 Data Models that people will use to share the the precise data you have defined.

3. **Make it friendly**: Create a friendly URL that is easy to remember and share. It will eventually look like this: https://app.groopit.co/friendlyname

Link additional resources: Link to your website, YouTube channel, Google Drive, or any other resource through the about page. Just add the text you want to display and remember to include the link.

Choose privacy settings: There are two privacy settings to consider:

- **Restricted (default).**
  Access to this group is restricted to specific people who have been granted permission by the organizer through email invitations, Slack or Slack channel membership, Teams or Teams channel membership, Salesforce permissions, groups from your identity provider, or any combination of the above.
- **Public.**
  This group allows participation by anyone, inside or outside the organization, provided they have a link to the group.

Chapter 6 | Add Aggregate Data Views

To empower everyone with real-time information, set up views of aggregate data. You can add views of leaderboards, stack rank, progress trackers, counters, and maps.

Here s how

1. Navigate to Views: Tap “Views” from the main navigation menu on the left side of the page.
2. Create a View: Tap “+Add a view.”
3. Choose a Data Model you want to create a view for.
4. Choose the data from the Data Model that you want to share.
5. Choose the View you want to use. Depending on your data you can choose from a leaderboard, counter, progress meter or map.
6. Choose who can see the View and what date range to use
7. Give your view a title.

8. Describe what data the view is sharing so everyone will know what aggregate data is being shared.
9. Add a label so it’s clear what data is being presented.
10. Tap “Publish.”

As new data is shared the View will automatically update.

Chapter 7 | Configuring Groopit App for Teams

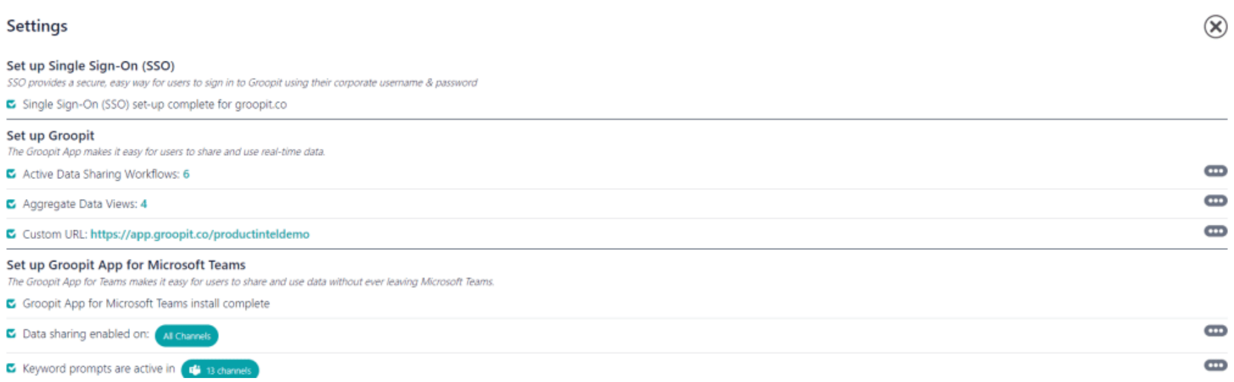
Once the Groopit for Teams app has been installed (Instructions **here**), the final steps for configuration are linking your group to a channel, setting up aggregate data feeds, and setting keywords, if applicable.

Confirm setup is complete, if necessary

You can confirm set-up is complete by tapping “+” in the compose window from any Teams channel, find the Groopit app below any names that appear and select “Groopit." If after you tap “+” and search for Groopit, Teams gives you the message,   We didn t find any matches,” then Teams installation has not been completed.

You can also check in Groopit to see if Teams has been installed:

1. Go to the Groopit application at https://app.groopit.co.
2. Log into Groopit with administrative permissions.
3. Find the Group you want to link to Teams.
4. Go to “About” in the navigation menu on the left side of the page.
5. Tap “Settings” in the upper right-hand corner.
6. Scroll down to the Teams setting.
7. If Teams has been installed, the Groopit App for Microsoft Teams install complete will have a green checkmark.



Linking your group to Teams

Linking a group to a specific channel in Team

When a group is linked to a specific channel, everyone in that channel can share data using

Groopit in the linked channel. Users will also be able to share from the Groopit web application, browser extension, and mobile apps.

1. Go to About > Settings.
2. Scroll down to the “Set up Groopit App for Teams.”
3. Tap the “Grant permissions” button across from “Grant permission so Microsoft Teams users can share data from any channel.” If the group is already linked to a channel, then tap the three dots.
4. Tap “+Enable sharing from a specific channel.”
5. Click “Connect a new Teams channel.”
6. From the drop-down choose your organization name.
7. Select “Everyone in the channel” so that everyone who is a member of the channel will have permission to access the group.
8. Choose the name of the channel from the drop down. Depending on the number of channels, this may take 30 seconds to appear.
9. Click “Add.”

Add the Groopit Bot to the channel of the Team or a chat

You may need to be a channel owner, depending on your Teams requirements:

1. Click on “Apps” in the left sidebar menu.
2. Find Groopit.
3. Click “Add to Team.”

Test the linkage by going to the Teams channel, opening a new message, tapping “+,” and searching for “Groopit.” If a sign-in button or the Groopit interface appears, the group has been successfully linked.

Linking a group to all Teams users and channels
Only the Groopit Enterprise Tenant administrator can connect a group so that data can be shared from anywhere in Teams. Email Success@groopit.co to confirm who your enterprise administrator is.

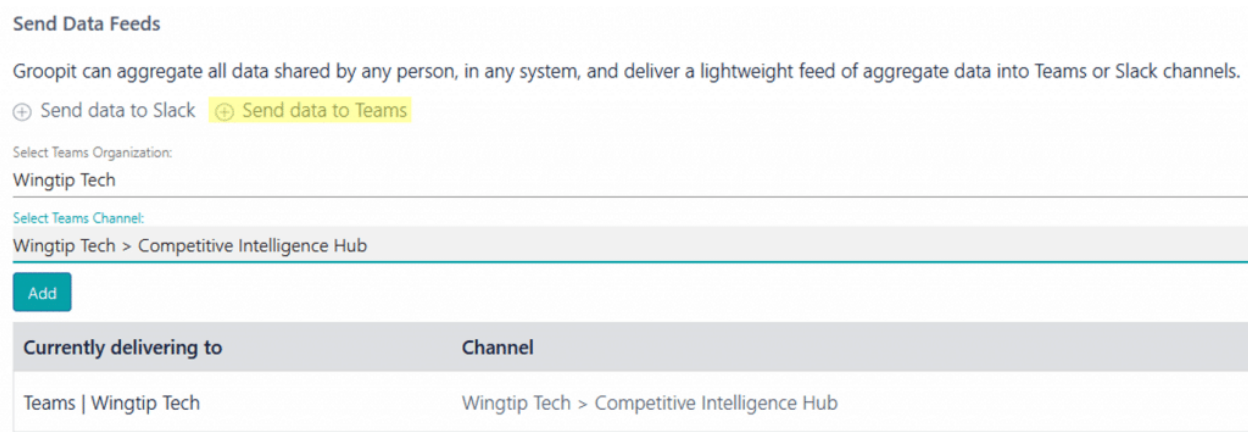
The tenant enterprise administrator will need to be an administrator in the group that is being connected. To connect the group to all of Teams:

1. Go to About > Settings.
2. Scroll down to the “Set up Groopit App for Teams” section.
3. Tap the “Grant permissions “button across from “Grant permission so Microsoft Teams users can share data from any channel.” If the group is already linked to a channel, then tap the three dots.
4. Tap “Enable sharing from any channel.”
5. Tap “+ Connect a new Teams organization." If you see a message that says, “Contact the Groopit enterprise administrator to make changes,” then you are not the enterprise administrator and will need to contact them to complete set up.
6. Choose your organization.
7. Select “Everyone in the organization can share.”
8. Tap “Add.”

Deliver aggregate data feed to channels in Teams
Users can share data from any Groopit client (web, mobile, Teams, Slack and Salesforce) and the aggregate feed of the shared data can be delivered automatically and in real-time to a Teams channel. Here is how:

1. Log into Groopit with administrative permissions.
2. Go to “Share” in the navigation menu on the left side of the page.
3. Find the Data Model that has the shared data you want to deliver to a Teams channel and tap the three dots in the lower right-hand corner.
4. Select “Send Data Feeds.”

5. Tap “Send Data to Teams.”



6. Below your Teams organization, tap “Select Teams channel.” It can take up to 30 seconds for the channel list to populate, depending on the number of channels in the list.
7. Pick the applicable Teams channel from the list.
8. Tap “Add.”

Confirm the data feed is step up correctly by sharing an insight from the Groopit web app and see if the insight appears in the channel in Teams.

Troubleshoot the data feed link: If the insight you tested with does not appear in the data feed channel, you may need to confirm the linkage in Teams. Go to the Teams channel where you want the aggregate data to appear, tap the “+” in the lower menu, search for Groopit, select Groopit. The Groopit menu to allow you to share data should appear. You can exit out, return to the Groopit web app and try sharing again.

To share data in Teams

Tap the “+” in the compose window, search for Groopit. Choose the Groopit app. A Groopit menu will appear. Choose the group and data model you want to use from the drop downs and follow the prompts, click “Share.” Once you have shared the data, any images or files can be added by clicking on the link in the post.

First-time use

The first time a user tries to share data; they will be asked to sign in to link their Groopit account with their Teams account. Click “Sign in,” follow the prompts, and then return to Teams and tap “+” from the compose window, choose the Groopit app and share.

Chapter 8 | Configuring the Groopit App for Slack

When a group is linked to a specific channel, everyone in that channel can share data using Groopit in the linked channel. Users will also be able to share from the Groopit web application, browser extension, and mobile apps.

Linking your group to Slack

Once the Groopit for Slack App has been installed, follow the steps below:
Click **here** for instructions to install the Groopit App for Slack

1. Sign into Groopit with administrative privileges if you aren't already signed in.
2. Click "About" in the navigation menu on the left side of the page.
3. Tap "Settings" in the upper right corner.
4. Scroll down to the "Set up Groopit App for Slack".
5. Find "Grant permissions so Slack users can share data from any channel" and tap the gray "Grant Permissions" button. This will bring up the Data Sharing page
6. Tap "+Connect new Slack channel."

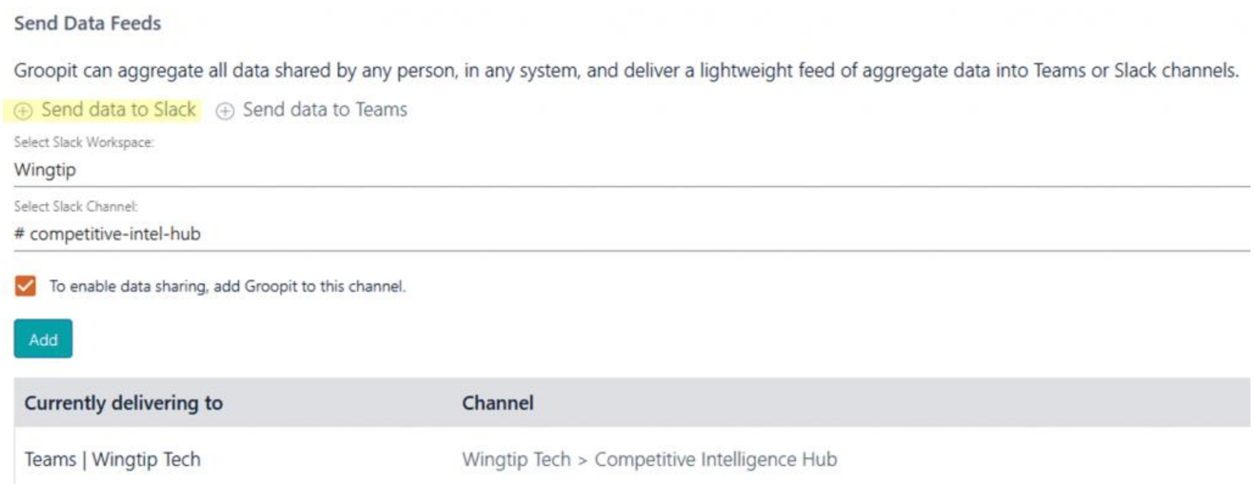
   ⊕ Connect new Slack channel

7. Select the correct Slack Workspace from the drop-down.
8. Select the Slack Channel to connect from the drop-down.
9. Tap "Add".
10. Repeat steps 6-9 for additional channels.

Deliver aggregate data feed to channels in Slack

Users can share data from any Groopit client (web, mobile, Teams, Slack and Salesforce) and the aggregate feed of the shared data can be delivered automatically and in real-time to a Slack channel. Here s how:

1. Log into Groopit with administrative permissions.
2. Go to “Share" in the navigation menu on the left side of the page.
3. Find the Data Model that has the shared data you want to deliver to a Slack channel. and tap the three dots in the lower right-hand corner.
4. Select “Send Data Feeds.”
5. Tap “Send data to Slack.”



6. Below your Slack Workspace, tap “Select Slack Channel.”
7. Pick the applicable Slack channel from the list.
8. If this is your first time setting up the channel, check the box “to enable data sharing, add Groopit to this channel.”
9. Tap “Add”.

To share data using Slack, type “/groopit,” then press return. A Groopit menu will appear. Choose the group and data model you want to use from the drop downs and follow the prompts, click share. Once you have shared the data, any images or files can be added by clicking on the link in the post.

First-time use

The first time a user tries to share data; they will be asked to sign in to link their Groopit account with their Slack account. Click “Sign in,” follow the prompts, and then return to Slack and type “/groopit” and press enter to share data.

Chapter 9 | Setup Keyword Prompts

Keyword prompts can be set up in Teams, Slack or Outlook. Keyword prompts encourage users to share data via Groopit and help build a habit. When setting up keyword prompts, you will first add the keyword prompts and then you will make them active in the appropriate application.

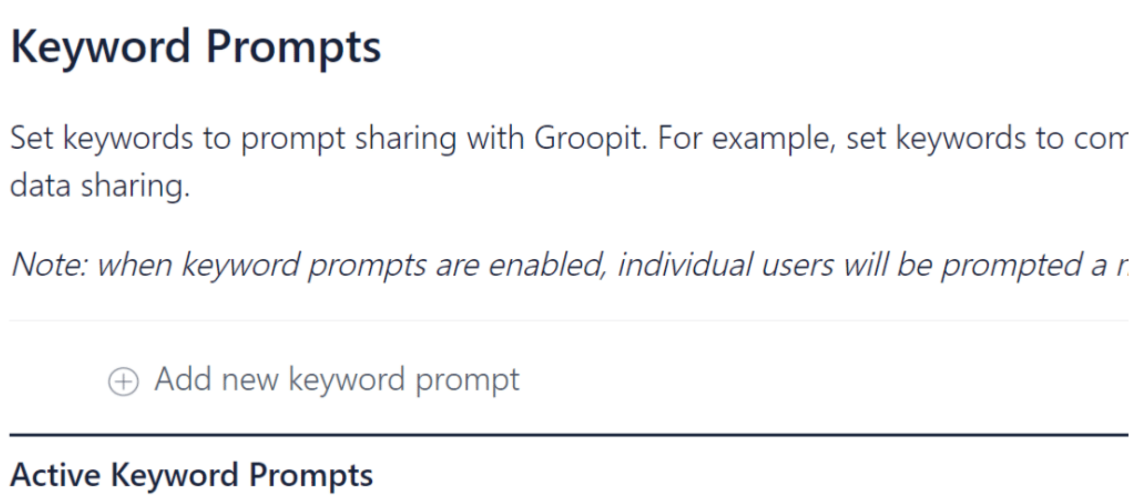
With keyword prompts you are creating a message that will prompt the user to share data via Groopit whenever a keyword is used. The message reads: "You just mentioned *[keyword]*. Do you have *[prompt]* to share?" They simply click the "share" link.

Individual users will be prompted a maximum of once per week to share data based on the key words they enter.

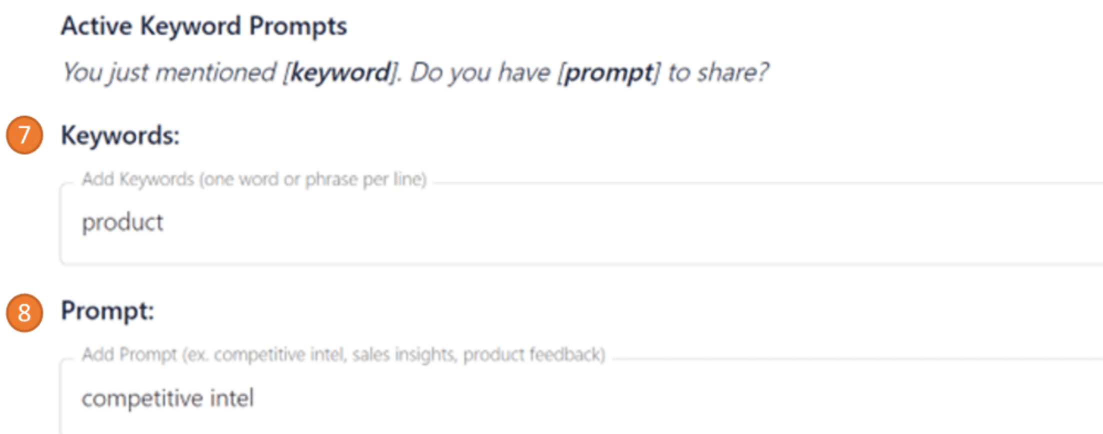
Here is how to setup keyword prompts:

1. Tap "About" in the navigation menu on the left side of the page.
2. Tap "Settings" in the upper right corner.
3. Scroll down to the "Keyword Prompts" section.
4. Tap the gray "Set Keywords" button.

5. You will be taken to the Keywords set up.
6. Tap "+Add new keyword prompt."



7. Under “Active Keyword Prompts,” in the box below “Keywords,” enter a keyword or short phrase. Users will be prompted to share data when they type this keyword or phrase. Note that you can have multiple keywords or phrases associated with a specific prompt — simply enter them all in the text box, each on its own line.
8. In the grey box under “Prompt,” add the prompt. The prompt is the message that Groopit will display to the user when they enter one of the defined keywords or phrases. The sentence is always phrased as “Do you have [prompt word or phrase] to share?” In the text box, enter the specific prompt word or phrase you want inserted into the sentence.



9. Tap “Save” on the right side.
10. Select the locations where you want the keyword prompts to appear. Tap the three dots on the right-hand side. Check the box next to the locations where you want Keywords to appear. You will only be able to choose locations that have already been linked to Groopit.
11. Tap “Save” on the right side.

12. To test, return to the location where keyword prompts are set up, type the keyword prompt and a message saying “You just mentioned [keyword]. Do you have [prompt] to share?” should appear. It can take up to 24 hours for a prompt to appear in Outlook.

Chapter 10: Link Groopit to Salesforce

Once the Groopit App for Salesforce has been installed, the Groopit administrator with the correct permissions in Salesforce can link Groopit to Salesforce and add Salesforce fields to Groopit Data Models.

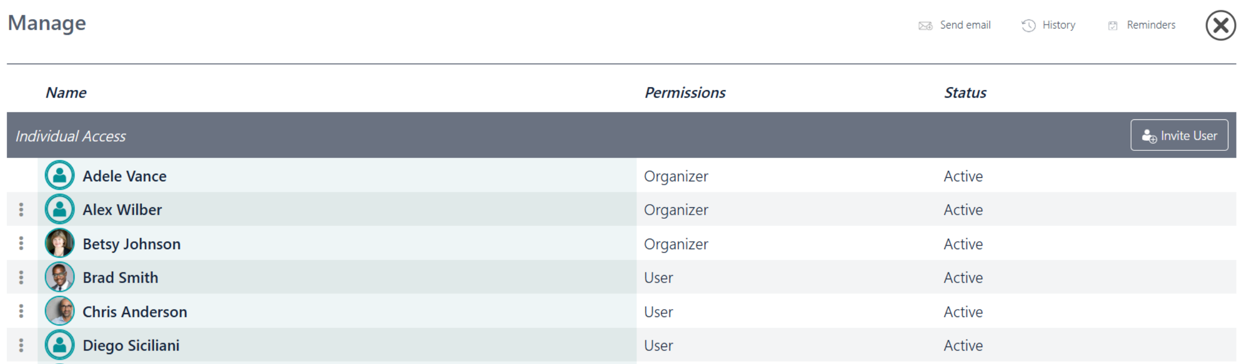
Here is how

1. Go to About > Settings.
2. Scroll down to the “Set up the Groopit App for Salesforce” section.
3. Choose the Salesforce instance that you want to link. You may be prompted to sign in to link your Salesforce account with your Groopit account. Sign in with the correct Salesforce credentials and follow the prompts.
4. Once signed in, tap “Allow sharing.”
5. To associate the Groopit data object with a Salesforce object such as Account, Case, or Opportunity. Return to the data model editor (Share > three dots > Edit), tap the Salesforce field, choose the appropriate object, edit the prompt, click “+ inherit data from Salesforce” to add data from Salesforce to the insight and click “Save.”

Users can then choose whether to save data to Groopit object in Salesforce from the web, Teams or Slack.

Chapter 11: User Access Permissions

For people to share insights and communicate regularly you will need to give access to Groopit. The standard subscription includes licenses for any user in your organization to share insights via Groopit.



Give users access to Groopit

There are four ways to give employees access to Groopit:

- **Email**
- **Via link** – Use the friendly URL you setup on the About page in all your communications.
- **Membership via Slack, Team or Salesforce** channels and permissions.
- **IDP groups** (for Professional or Enterprise Subscriptions that have installed SSO).

You may use more than one of these methods depending on your use case. Users helping you set up and test your data models prior to launch may be added via invite or link. When launching, users may access Groopit via Teams or Slack or be sent a link during a training. If you have larger groups of users, you may use IDP groups to manage access.

Best Practice: Create a table outlining who you will invite and how. For example,

- People helping with setup – Email invitation from Groopit and link via your email
- Users via Teams – Name of Teams channel, confirm users can access channel
- Users via Slack – Name of Slack channel, confirm users can access channel

Once someone has shared or viewed data in Groopit, they remain members of the group until they are either explicitly removed from the group or their SSO privileges are revoked (even if their original access point is changed or removed).

Give access to users via invite

Give users access from the Users page. Go to Users and tap “Invite.” Add a custom message and enter user emails. You can invite one person, or multiple people by entering each email. Groopit will take care of the links and sending the message.

Troubleshoot invitations: Sometimes invitations wind up in junk or spam folders. If a person you have invited to the group is unable to find their invitation, have them check their junk or spam folder for a message from invitations@groopit.co. Users should add groopit@groopit.co and invitations@groopit.co to their safe-sender list to make sure they receive all emails, announcements and other communication.

Once invited, the user email address will show on the Users > Manage list as pending. Once they join the group, it will change to manage.

Users can access Groopit once they have been invited by:
1) Clicking on a friendly URL that has been shared with them via email or a kick-off event, sign-in and click on the group name.
2) Click the   Join” link in the email invitation. They will be taken to the group.
3) Share insights via Teams, Slack, Outlook or Salesforce

Add users via Slack or Teams Channels

If the user is a member of the linked channel, they can share insights. The first time the user shares an insight, they will be asked to sign-in by entering their email and company credentials.
Note: The group must be linked to the channel for a user to have access to Groopit via their channel membership, unless you have enabled access for all of Teams or Slack.

Add users via Salesforce

1) Install the Groopit App for Salesforce and add the appropriate users or groups to the application.
2) Link the group to Salesforce via About > Settings.

3) The first time the user shares an insight from Salesforce, they will be asked to sign in by entering their email and sign in with their company credentials.

Add users via Organizational permissions

If you are using SSO, you can give permission for everyone with your email domain access to a restricted group with organizations permissions. Share the link with them, and when they click on the link, they will be asked to sign-in with their company credentials and access the group.

To grant organizational permissions, go to Users > Manage and scroll down to the "Organizational Permissions" section of the page. Click on "Grant permissions." If the organization is given permission, anyone within your organization, whether you have added them individually or not, will have access to the group.

Add users via IDP groups (Professional or Enterprise Subscription Only)

If you are using SSO, your organization may support IDP (Identity Provider) groups, also sometimes called entitlement groups. If you have a Groopit Professional or Enterprise Subscription, these allows you to use groups of users established by your company s identity provider to grant Groopit access. If the users you want to add are already part of an IDP group, you can add all the IDP groups members at one time. If you would like to manage access to Groopit via an IDP group, you and your IT group will need to complete the steps.

1) Enable SSO via the Groopit App for Entra or Okta. If you use a different identity provider, please contact support@groopit.co. Instructions for installing SSO can be found here.

2) Add the IDP group to the Groopit SSO application. This is typically done by the IT group that manages your SSO during configuration. If you want to add an IDP group after initial configuration, you will need to ensure that the IDP group is added to the Groopit SSO application. *Please note that Groopit does not support nested groups*.

3) Add the IDP group to the User page once a member of that group has signed into Groopit. If they already have access to Groopit, they will need to sign out and re-sign in. Visit Users > Manage, scroll down to Organization access and tap "+Add group." Choose the appropriate group from the list.

Users can ask to join group

If your group is set to private and you have sent people a link with a friendly URL, users can click on the link, sign-into Groopit and you will automatically be sent a request for that user to join the group.

Accept join requests: If your group is private, every person who wants to join will require approval. Organizers can go to Users > Manage to see join request and approve them. Organizers will also receive an email when people request to join. Pending join requests will appear for organizers under Users >manage. Tap "✓" to approve and "✗" to ignore.

Organizer Permissions

Organizers have broad permissions to change all aspects of Groopit. Groopit organizers have permissions to add or edit data models, change settings, add or remove users, edit insights that have been shared by other people, publish summary insights to the group, and download data. When adding additional organizers consider whether they need these broad permissions. You may want to add organizer permissions for another member of the team so they can provide backup if you are not available.

Organizers can only be added from the Users > Manage page. You can give an existing user, organizer permissions or you can give a user Organizer permissions when granting initial access. A limited number of organizers is included with your subscription. Additional organizer licenses can be purchased for $495/month, paid annually. Contact your Groopit customer success representative to purchase additional organizer licenses.

Encourage users to share intel while they are on the go with the Groopit Mobile apps.
Make it easy for everyone to provide real-time data in the moment with the Groopit app. It s available to download for both Apple and Android devices.