

# GETTING PRODUCTIVE WITH TEAM WORKSPACES



COUNTERSOFT

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## Getting Productive With Workspaces

### What we're going to cover

Workspaces are fundamental features of Gemini. Here we are going to cover their scope and the features that they provide to help people pro-actively manage workloads, communicate, collaborate, share information and report. From an end-user's perspective every piece of Gemini's functionality executes within the context of a Workspace. It may seem odd therefore that you can log into Gemini, look at data in projects, edit work items, run reports etc. all outside of a Workspace. However, once you have grasped the power of Workspaces to help you organize information for every single stakeholder, giving you a zero maintenance environment where work is pro-actively moved to the right people at the right time, regardless of type, priority, resources, or any other values you choose to package work by, you will wonder why anybody would work without them.

### What is a Gemini Workspace?

Workspaces are one of the key differences between Gemini and every other product in its space. A Gemini Workspace consists of 4 things:

1. The data that is filtered.
2. The default view of data, made up of:
  - a. a default Gemini screen (e.g. Item Grid, Board, Calendar etc.);
  - b. the columns and column order of the [Item Grid](#) view.
3. The menu items and apps that are relevant to the information in the Workspace and the required functionality e.g. the [Docstore](#) app because the Workspace requires documents or the [Roadmap](#) and [Changelog](#) apps because the Workspace tracks Scrum/Agile workloads.
4. If the Workspace is shared, the stakeholders (Gemini Users) who share that workspace and collaborate in it.

### Creating Workspaces

Creating Workspaces is a simple process of clicking on the Workspace creation icon in the top left corner of every Gemini screen. You can also create a Workspace by clicking on the Add button in the top right of the screen and choosing to 'add' a Workspace.

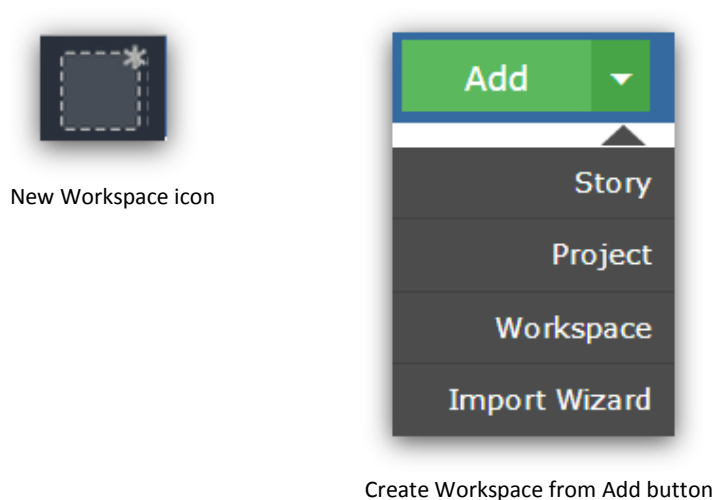


Fig 1.0 Two Ways to create a Workspace

When you first create a Workspace, Gemini requires only the essential subset of all of the information that a Workspace contains. You will need to provide the following:

**Key:** This is a maximum of 4 characters and the best styling convention is based on the periodic table, with a mix of upper and lower case characters. For example, a Workspace that filters high priority items might be named “Hpri”.

**Color:** Every Workspace is associated with a color so that you can easily distinguish it on the screen. There is no prompt for color, simply select a color from the palette displayed below the Key.

**Name:** The name will be displayed whenever a user hovers over the Workspace key and provides more descriptive text to give the Workspace context to people who might not be familiar with its purpose.

**Terminology:** In addition to Workspaces, Gemini has another unique feature – [Project Templates](#). Each Project Template is associated with a Resource file that allows you to override any of Gemini’s standard terminology with the terminology of your business. For example, if it is not your normal business practice to refer to people as Resources, you can override Gemini’s terminology to replace the word “Resource” with “Employee”. The power of Gemini is that it has no restrictions on the number of Project Templates that you have so even departmental terminology can be implemented, greatly lowering one of the highest and earliest barriers to adoption.

**Views:** There are 5 standard views in Gemini – the [Items Grid](#), (Agile Planning) [Board](#), [Calendar](#), [Timeline](#) and [Progress](#) (Burndown, Burnup and Velocity charts). In addition, Gemini has a UI App framework by which it can be extended, many of which are open sourced. You choose from the standard 5 plus any UI app extensions, the views that are most appropriate for your Workspace.

The image shows a 'New Workspace' dialog box. At the top, it says 'New Workspace' and provides a brief description: 'Workspaces enable collaboration across multiple projects with co-workers. Use metrics, team chat, email notifications and reporting to manage your work.' Below this, there is a 'Key' input field, a color palette with 16 colored squares, and a 'Name' input field. Underneath, there is a section 'Choose your terminology:' with a dropdown menu currently showing 'Agile Development Process'. Below that is a section 'Choose your views:' with several checkboxes: 'Stories' (checked), 'Board' (checked), 'Calendar' (checked), 'Timeline' (checked), 'Progress' (unchecked), 'Changelog' (unchecked), 'Quick Entry' (unchecked), and 'Roadmap' (unchecked). At the bottom right, there are two buttons: 'Add' (blue) and 'Cancel' (grey).

Fig 1.1 The New Workspace dialog

**Note:** The image above shows the effect of the Terminology override. The selected Agile Development Process Template overrides the Item Grid (and the word “Items”) with the Agile term “Stories”.

## Where's my Workspace?

As soon as a Workspace is created it moves to the Workspace toolbar on the left hand side of the screen. This is a scrolling region so you can have as many Workspaces as you need to quickly and easily find the things and the people you need to work with to get work done. Each Workspace appears as a card, displayed in the selected color and with the Workspace Key identifying it. If you hover over the card then the full name is displayed and if you click on the Workspace to select it then it is highlighted by a white border to indicate it is selected and in the bottom left its key, name, color and a save icon are displayed.



*Fig 2.0 Workspace Cards. These are displayed in the left hand toolbar. The active Workspace always has a white border.*

## Badge notifications and the Shared Workspace indicator

In addition to the basic display of the Workspace as a card, Workspaces also display badge notifications (as shown in the image above where one Workspace is indicating 4 changes) that show at a glance if changes have been made to items in the Workspace and if there are any unread team chat messages. This is covered in more depth in the section Notifications and Alerts.

Workspaces can be shared in two modes. Participants can be given a copy of a Workspace, in which case they own and can change it. Alternatively a single Workspace can be shared but ownership is retained and only the owner can change it. In the case of the latter, the locked nature of the Workspace is indicated by a triangle at the side (as in the case of Workspace Rpt above).

## Ordering Workspaces

You can drag-drop Workspace Cards in the left hand toolbar so that your most commonly used Workspaces, or the ones that contain items you most need to track, are at the top. Gemini will log users into the topmost Workspace, so you, your colleagues and stakeholders go straight to the tasks that matter without having to navigate through a system menu.

## Using Workspaces

### Filtering Data

The Gemini filter lets you find and pro-actively select the data that you want to work with. By pro-active we mean that you can create a filter for values that do not currently exist, when they do Gemini will automatically select them. For example you could create a Workspace filter that identified every helpdesk ticket that had the word “Network” in the description, or every task that had a severity level of “High”. You may have no such items in the system but as soon as one is created, Gemini will pull it into the workspace.

The Gemini filter runs across the top of the screen, just beneath the menu bar. The first and only mandatory element, in the left hand side is the project selector, where you can specify one or more projects, or all projects to filter data from. Next to the project filter is the meta filter, that translates concepts such as “Assigned to me” etc.

To add or modify filter criteria simply click on a current filter value or in the Search box to add a new field to filter by. Gemini even allows you to filter by [Custom Fields](#), defined by you but treated as if they came out of the box.

The final box on the filter row allows you to specify options. The only true filtering option is whether to include closed items in the view or not.



Fig 3.0 The Gemini filter

The first thing that Workspace creation does is grab the current filter and apply it. So when you click to create a Workspace with the New Workspace icon or via the Add button, Gemini automatically sets the Workspace filter to your current view.

**Exercise:** log into Gemini (if you don't have a Gemini instance then you can take a free hosted trial), navigate to the Dashboard where your projects are listed and select a project at random. Click in the open filter criteria box, labelled “Search” and select the project attribute “Status”. Select one or more status values and then click on the New Workspace icon. Fill in the fields (key, name etc.) and save your workspace – you now have a Workspace that filters the status(es) you selected.

### Changing the workspace filter

You can dynamically alter the data that you filter without permanently changing the Workspace filter. For example, you may be in a Workspace that filters High Priority items and want to find out which of those are unassigned. You could immediately extend the filter to exclude values where Resource = “Unassigned”. Gemini will immediately filter the data for you to include this selection *but that does not change the Workspace filter*. As soon as you click on the Workspace card in the left hand toolbar the default filter (that does not yet include the Resource sub-selection will apply). To permanently change a Workspace filter you must set the filter to the conditions that you want and then click “Save” on the Workspace toolbar located on the bottom left of the screen.



Fig 4.0 Unlocked toolbar mean the Workspace can be altered and changed

### Why can't I change the Workspace filter?




If instead of a save icon the Workspace shows a padlock, it means that you are using a shared workspace and whoever shared the Workspace has marked it as locked. For more on this see the section Sharing Workspaces below.



Fig 4.1 Locked toolbar means the Workspace can be altered by the user in a session, but no change can be permanent

## Configuring Workspaces

The Workspace creation dialog prompts for the basic information required to create a Workspace, there are several other options that can be configured for a Workspace. To configure a Workspace it must be selected (click on it in the left hand toolbar and it will be highlighted by a white border). In the bottom half of the right hand toolbar are the icons that will allow you to:

1. Copy a Workspace 
2. Delete a Workspace 
3. Configure a Workspace 

To amend or override any of the Workspace configuration settings, simply select the Workspace and click on the Configure icon in the right hand toolbar. A Workspace Configuration dialog will be displayed.

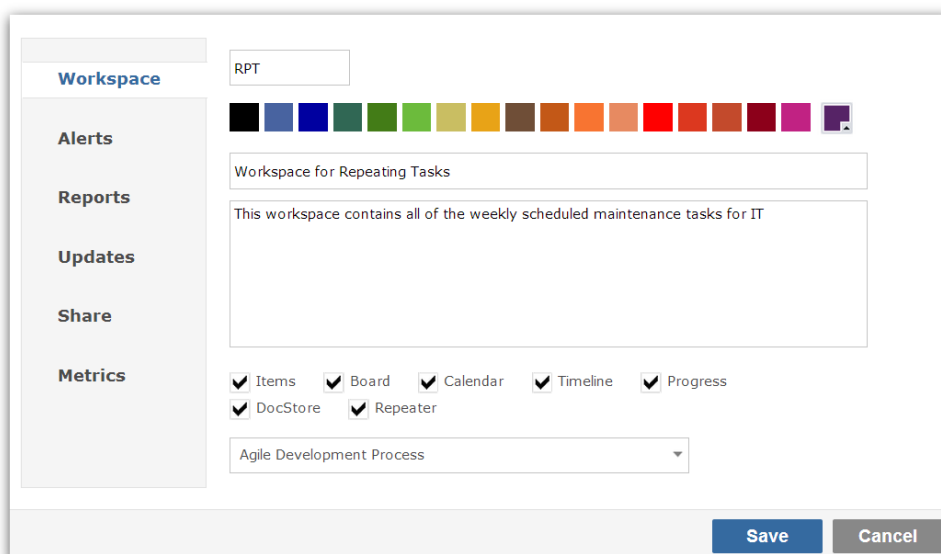


Fig 4.2 The Workspace configuration dialog

## Notifications and Alerts

### Notifications

By default every Workspace is configured for Notifications and is set to:

- Highlight Changes
- Display Badge Counts

**Highlight changes** shows items on the Items Grid in a different background colour if they are new, updated or commented upon.

**Badge Count Notifications** tell Gemini to count the number of changes that are made to unique items in a Workspace and to show that count on both the Workspace Card in the left hand toolbar and the Workspace Save toolbar on the bottom left. Gemini tracks up to a total of 5 changes. If more than 5 changes have occurred then 5+ will be shown in the Badge Count.

To amend these settings, click on the Updates tab on the Configuration dialog and check/uncheck these two options.

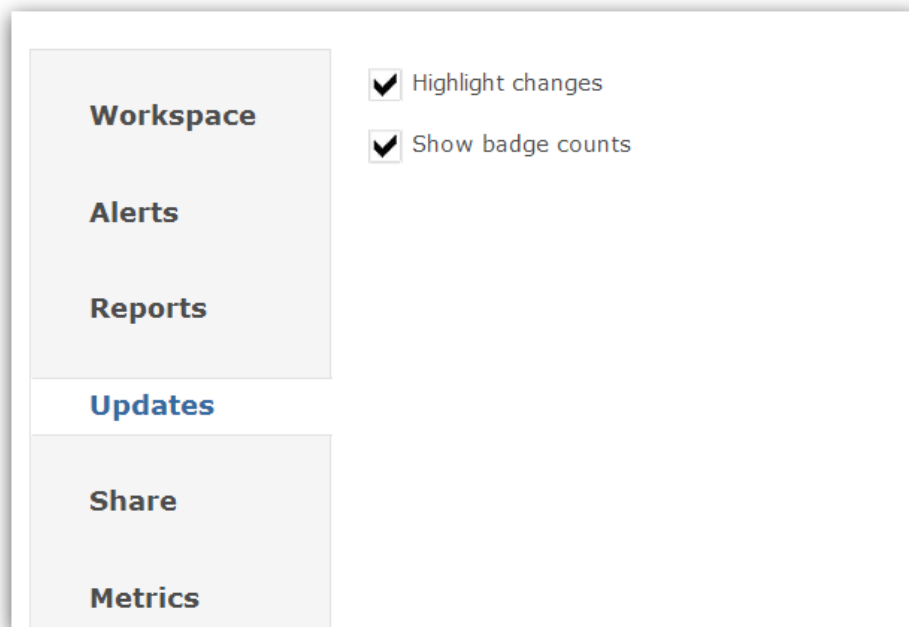


Fig 5.0 Configuring Workspace Notifications

### Reviewing updated Items

The updates tab contains more than the checkboxes that allow you to switch notification option on or off. New and updated items are also listed in this area together with a count of total items listed. Against each item is a selection Checkbox. All items can be simultaneously selected by ticking the topmost item checkbox (against which there is no item), or items can be individually selected/de-selected using the checkbox. Three actions are possible against selected items.

1. The update notification can be cleared. This does not have any effect on the item itself, only the Workspace notification is cleared.



2. Their details can be emailed to other Gemini users, along with a message. These users can be selected individually or by [User Group](#).
3. They can be [Followed](#). Following items in Gemini results in notifications being sent on any change to the item. It is the kind of action that might be needed on a particularly thorny or sensitive bug or issue that needs to be closely tracked.

Every item has a key (Project ID followed separated from unique Item ID by a hyphen "-"), which is a hyperlink to the detailed view of the item, where its history (if History is enabled in the [Screen content of the Project Template](#)) can be seen and the exact nature of any change or comment reviewed.

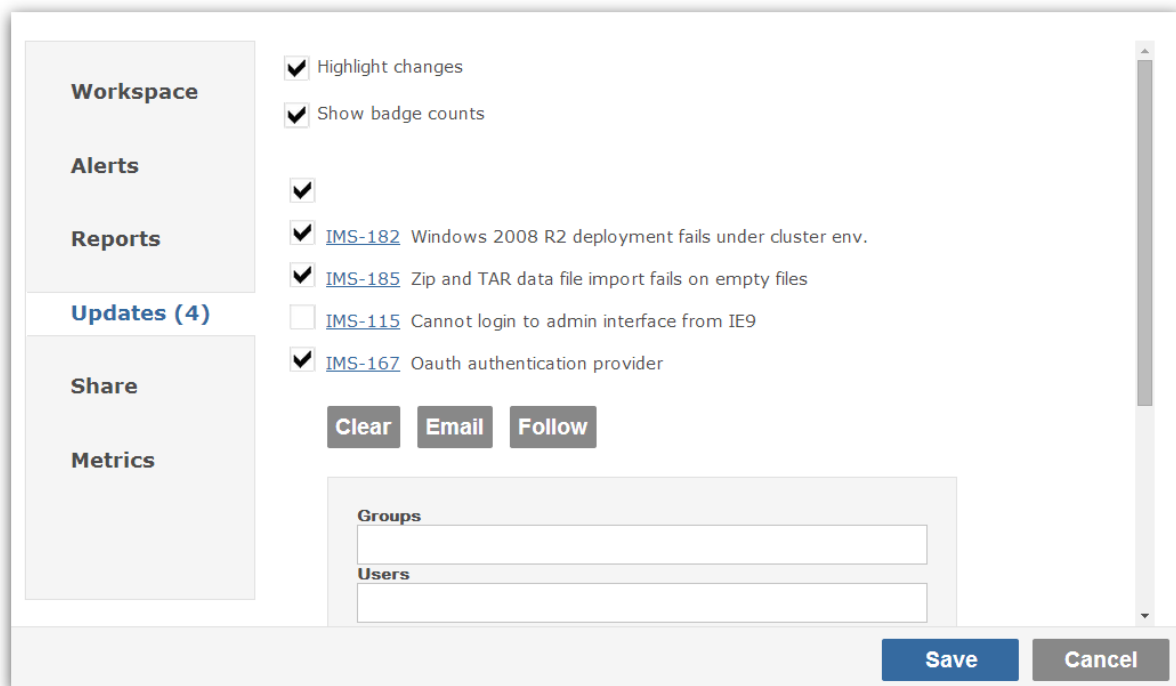


Fig 6.0 Updates tab showing new, changed or commented upon items

### Clearing Workspace Badge Counts

Often it might be unnecessary to drill into the Workspace Configuration to see the list of updated items. If Highlight Changes is switched on, they will be highlighted in the Item Grid anyway and easy to find and investigate. For this reason there is a simpler way to clear Workspace Notifications and B Badge Counts and that is to hover over the Badge Count in the bottom left Workspace Toolbar, at which point the count will turn to a "x". Click the "x" and all notifications are immediately cleared and the Workspace update count reset.

## Alerts

Alerts connect changes in your Workspaces to your email inbox. You can choose to receive email alerts under the following conditions:

- When items are updated
- When items are created (a function of the dynamic nature of the filter)
- When items are commented upon

You can also choose to subscribe other Gemini users to receive these email alerts, either by selecting them individually, or by choosing them as a [User Group](#).

The screenshot shows a configuration window for workspace alerts. On the left is a sidebar with a vertical list of menu items: 'Workspace', 'Alerts' (which is highlighted in blue), 'Reports', 'Updates', 'Share', and 'Metrics'. The main content area is titled 'Receive email alerts:' and contains four checked checkboxes: 'Created', 'Updated', 'Comments', and 'Receive individual email alerts per item (not batched)'. Below this is a section titled 'Subscribe others:' which contains two input fields. The first is labeled 'Users' and has a dropdown menu showing 'Anne Parry'. The second is labeled 'Groups' and has a dropdown menu showing 'Managers'. At the bottom right of the window are two buttons: 'Save' and 'Cancel'.

Fig 7.0 Configuring Workspace Alerts

The content and format of these alerts is entirely under your control and for more information on how to configure the form and content of Gemini's alert templates see the documentation [here](#).

## Sharing Workspaces

Workspaces make internal and external collaboration quick, simple and painless. To share a Workspace, click on the Share tab. There are only two options:

- Lock and Synch Changes
- Enable Team Chat

Fig 8.0 The Share Workspace dialog

**Lock and Synch Changes** makes the current Workspace a master Workspace that all the people it is shared with use. In other words, there is only one Workspace, it belongs to whoever shared it and only that person can change it. It is worth reiterating at this point what is being shared:

- The key, name, color and terminology of the workspace
- The data that is filtered.
- The default view of data, made up of:
  - a default Gemini screen;
  - the columns and column order of the Items Grid view.
- The menu items and apps relevant to the Workspace and the required functionality.

Recipients of a shared, locked Workspace can change the filter to select different items and change the columns and column order in the Items grid, but because they do not have the Save Workspace function (they only see a padlock in the bottom toolbar) they cannot change the Workspace itself, only their dynamic view of the work within it during that session.

**Enable Team Chat** allows users of a shared Workspace to message one another using the chat function contained within the collapsible right hand toolbar. Chat is tracked and stored at a Workspace level, to communicate around single items (bugs, issues, tickets etc) use the Comment

field, which also supports the concept of restricted visibility (commenters can choose which groups of users can see their comments).

*Team chat is only enabled for locked and synched Workspaces since it is the only scenario in which all participants share the same Workspace.*

### What happens if I don't lock and synch a Workspace I share?

If a workspace is shared and the Lock and Synch option is unchecked then every user with whom the Workspace is shared will receive their own unique copy of the Workspace, which they will be able to amend and save. It is visually clear if a Workspace is locked or not because of the triangle on the left hand side of the Workspace card, which is only present with locked Workspaces.

### Deleting Workspaces & Transferring Ownership

Users can delete unlocked (private) Workspaces at any time simply by clicking on the Workspace they wish to delete and then clicking on the delete Workspace icon at the bottom of the right hand toolbar.

Users cannot delete locked Workspaces. The Workspace owner must delete them from the list of users with whom the Workspace is shared or remove the Group from the sharing if they are members of the Workspace by virtue of being members of a User Group.

If the owner of a shared, locked Workspace attempts to delete the Workspace while it is shared, Gemini will prompt to transfer the Workspace to one of the users with whom it is shared instead. The Workspace owner can either transfer ownership of the Workspace or continue with the delete operation.

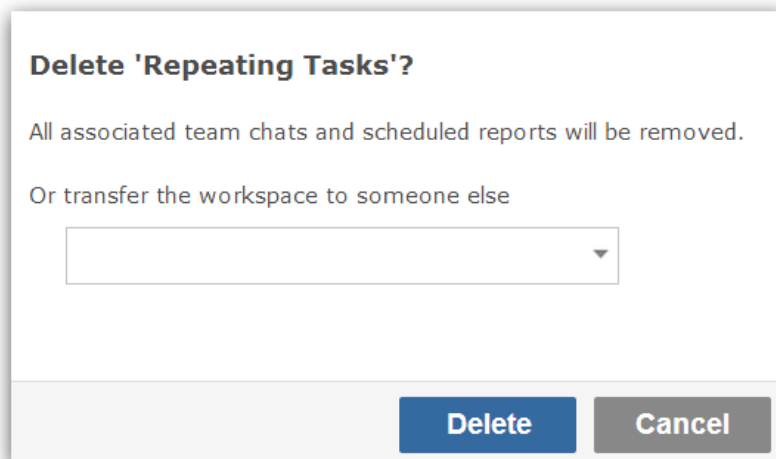


Fig 9.0 Delete confirmation dialog

If a shared, locked Workspace is deleted then all team chat entries, including historic entries, and any schedules of reports that run against the data in the Workspace, will be cancelled.

## Scheduling Reports

Gemini's standard reporting output is predominantly via Excel and user can extract data to be used in a variety of standard or [custom reports](#).

All Gemini's reports work the same way – the data that is returned by the filter criteria, whether that is from for one, multiple, or all projects, is passed to the Excel report for processing. Given that one of the key elements of a Workspaces is the data it filters, it follows that basing reporting on a Workspace is not only a natural extension of the functionality of the Workspace, it is also remarkably simple.

To schedule reports for a Workspace, click on the Reports tab. You can select as many of the existing reports as are appropriate for the Workspace and set up an hourly, daily, weekly or monthly repeating schedule. Gemini will execute the filter of the Workspace, produce the report(s) and email them to all the subscribed recipients.

Fig 10.0 The Scheduled Reports dialog

## Workspace Metrics

Gemini's Excel reporting provides a simple mechanism for creating charts and reporting key metrics. However, Workspaces give you an even simpler way to track and manage key metrics by giving you access to a pre-defined list of metrics and visual representations of them.

Gemini gives you [30 different metrics](#) any of which can be pre-selected as associated with a Workspace and available to all users of the Workspace. To set up Metrics click on the Metrics tab and select the charts and/or numbers you would like to show. These will be available every time you slide out the right hand toolbar by clicking on the double chevrons at the top.

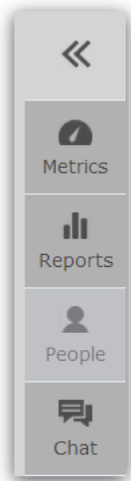


Fig 11.0 Gemini's Slide out toolbar on the right hand side of the screen

## Workspace People

The Workspace not only contains the people (either as individuals or as members of User Groups) with whom it is shared, it also tracks and shows resources who are assigned to tasks as well as unassigned work (by treating Unassigned as a person).

To see work by resource, click on the People tab in the Slide out toolbar. Gemini will show a summary of unassigned work as well as work by individual for all items tracked by the Workspace.

everity	Status	Area	Revised
...	Assigned	Middleware	8/1/2013
...	Assigned	API	8/1/2013
...	Assigned	Schema	8/1/2013
...	Assigned	Campaigns	12/12/2013
...	Assigned	Data Loaders	12/12/2013
...	Assigned	Administration	12/12/2013
...	Assigned	Administration	12/12/2013
...	In Progress	Social Media	12/12/2013
...	Assigned	Database	12/12/2013
...	Assigned	UI	12/12/2013
...	Assigned	ETL Processes	12/12/2013
...	Assigned	Schema	12/12/2013

**Unassigned** First task today

**16** Last task 12/31/2013

STORIES Estimate 0h 0m

**Dele Sikuade** **24**

Available 1/2/2014 STORIES

ESTIMATE **0H 0M**

LOGGED **0H 1M**

0h 1m

**Gary Fenton** **18**

Available 12/24/2013 STORIES

ESTIMATE **0H 0M**

LOGGED **0H 2M**

0h 2m

**Sean Wright** **0**

Available today STORIES

Fig 12.0 The information shown on the People tab

To filter the task list on the left to include only work covered by a particular resource (or Unassigned), click on the person in the People tab and Gemini will automatically apply a resource filter.

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## Workspace Subscriptions

With the ability to subscribe users (and oneself) to alerts and notifications as well as reports, the potential exists for people to be recipients of these communications from sources that they are unaware of. The classic “I get all this stuff...” complaint is invariably a precursor to a state where people ignore information because they are overloaded by it.

Gemini avoids this problem by allowing users to see exactly where information they have not directly requested through their own actions comes from.

To see the Workspaces and the alerts, notifications and reports you have been subscribed to by third parties, simply click on your User Name in the top right hand section of the screen (not the drop down menu attached to it) to invoke the User Profile dialog.

Click on the Alerts tab to see all the Workspaces that you are subscribed to, who owns them, and what type of information you are subscribed to.

There are also two simple checkboxes to allow users to state they do or do not wish to receive email alerts, and whether they want Gemini to email them the details of any changes.

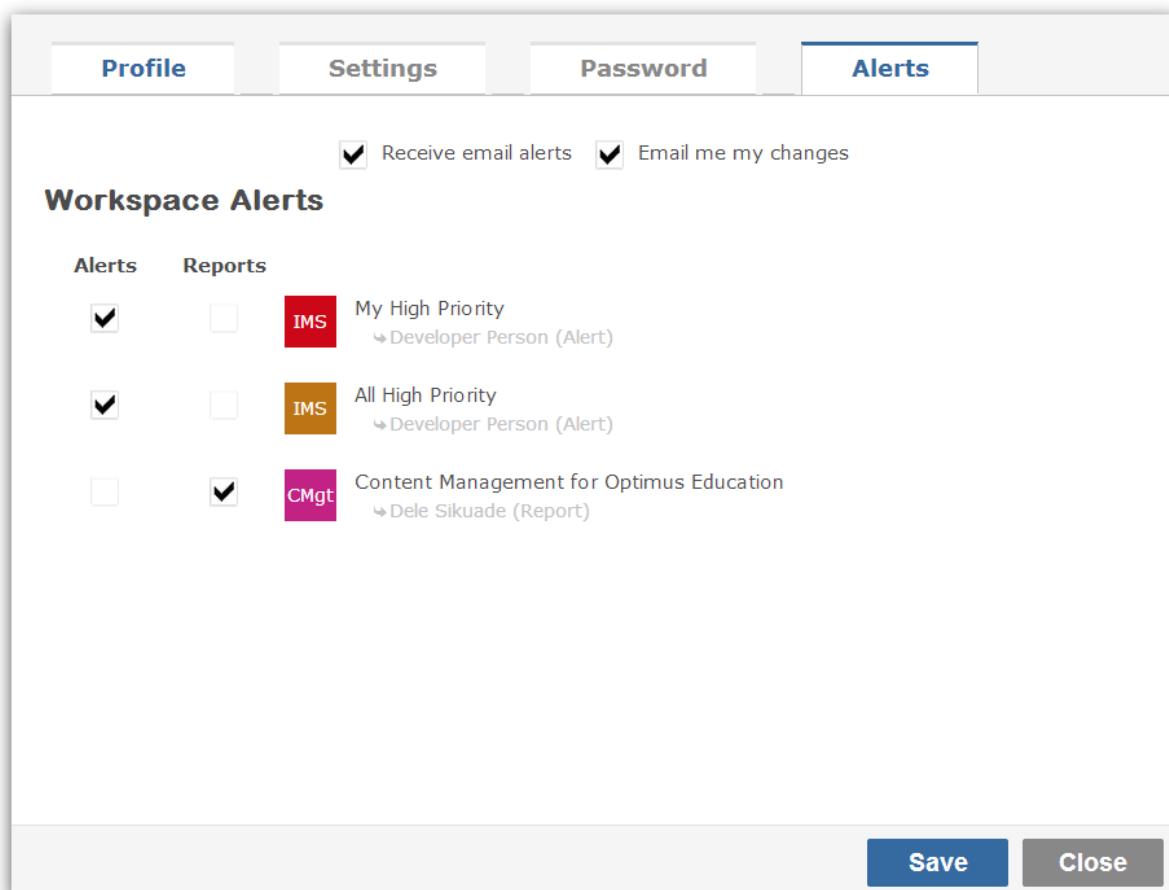


Fig 13.0 Workspace Alerts on the User Profile

**Note:** By default Gemini will always allow users to decide if they wish to receive alerts and these cannot be forced upon them.

## Copying Workspaces

To clone a Workspace and everything in it simply click the Copy Workspace icon at the bottom of the right hand toolbar. The currently active Workspace will be immediately copied and placed in the Workspace toolbar.

## What Workspaces Won't Tell You

Workspace updates are designed to let you know what other people are doing with the work that falls in your domain. Gemini will not track changes that you yourself make as Badge Count Notifications or highlighted changes, it will only do that for other people whose Workspaces reference the data that you have created, changed or commented upon (provided they have chosen to see Badge Counts and/or Highlight Changes). There's not much point in telling you what you already know.

## A Final Word on Workspaces

Gemini's Workspaces together with features such as [Rules and Actions and SLA](#) that are not covered here are designed to give you a system that pro-actively manages workloads and takes the strain from the mundane.

Set the data filters, alerts and notifications for the work you need to deal with, pick the stakeholders and share the Workspace with them, define the reports you need to have delivered to email inboxes and trust Gemini to take the strain. If it's in Gemini, it can't fall through the cracks; whether you are dealing with Tickets, Bugs, Issues, or non-IT business processes, Gemini captures, tracks, reports and manages every task from opened to closed.