

HOW TO USE
REETRO AS A

Team member

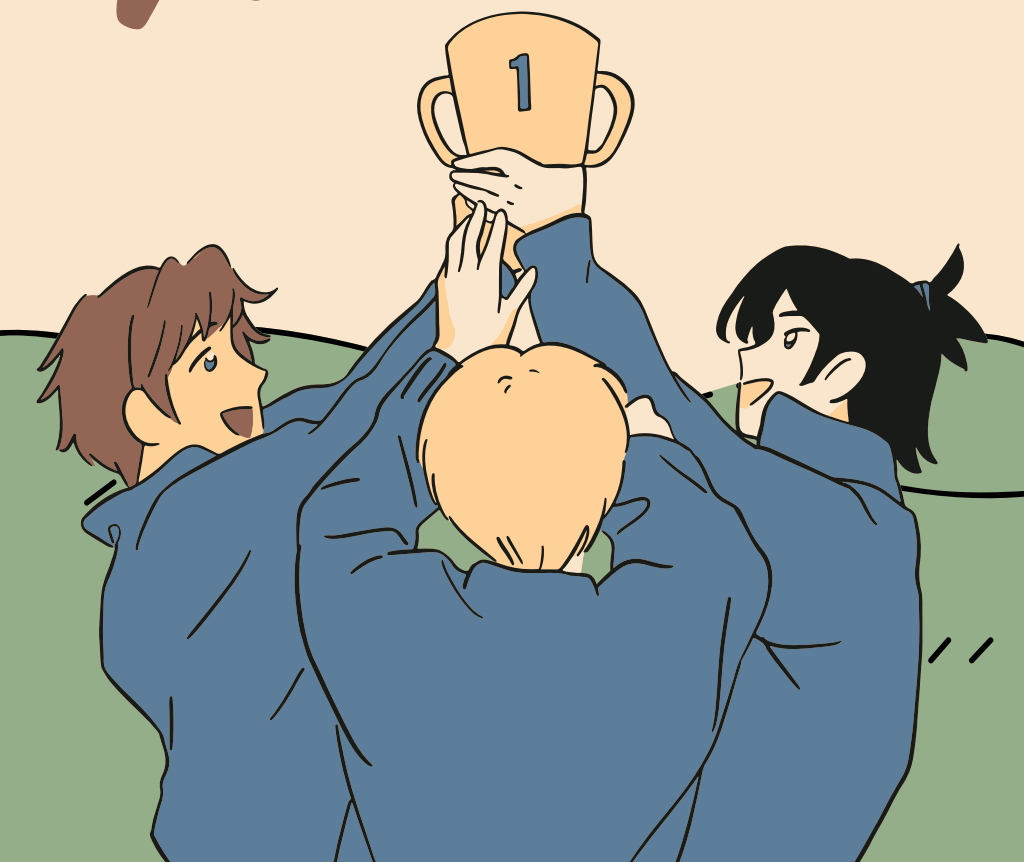


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HOME VIEW

Displays an overview of all boards with options to create, search, and filter boards. Users can access starred boards and sort by creation date or team.

LEFT MENU

The navigation panel offering quick access to key sections like Home, Team & User Management, Analytics, Action Tracker, and Settings for platform preferences.



PROFILE & USER SETTING

The Profile Menu provides quick access to important account-related actions and settings.

1. Profile Settings

Manage your account information, update security settings, and customise preferences.

2. Support

Access help articles, FAQs, or contact the support team for assistance.

3. Upgrade

Explore premium subscription plans to unlock advanced features.

4. Sign Out

Securely log out of your account to protect your information.

PROFILE

My Profile Settings

Profile 2FA My Teams Emails & Notification

Pick Your Avatar

kettepouddenau-4133@yopmail.com

David

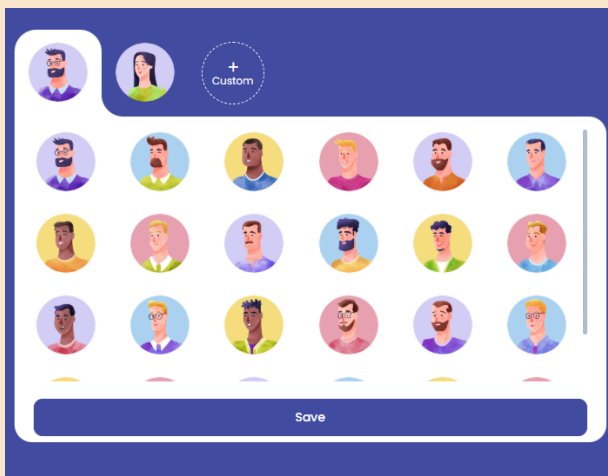
New Password

Confirm New Password

Delete Account Save

The Profile tab allows you to:

- Choose or update your avatar
- Edit your username
- Update your password
- Delete your account or save changes



2FA (TWO-FACTOR AUTHENTICATION)

The 2FA tab enhances account security with an additional layer of authentication.

Features include:


- Enable or Disable 2FA:
- Activate or deactivate 2FA for your account.
- Setup Options:
- Configure apps like Google Authenticator or Authy for secure logins

My Profile Settings

Profile 2FA My Teams Emails & Notification

Two-factor Authentication

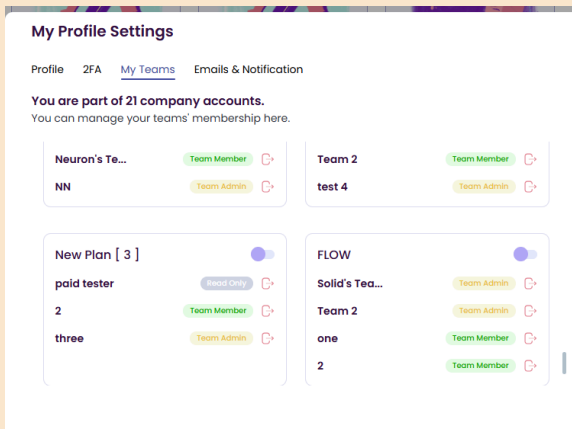
Set Up Two-Factor Authentication



1. Install Google Authenticator or Authy application on your phone.
2. Scan the QR code.
3. Enter the code.

Two-factor Code

Verify Code



EMAILS & NOTIFICATIONS

The Emails & Notifications tab allows you to customise how you receive updates.

Features include:

- Manage Subscriptions: Toggle switches to unsubscribe from specific types of emails
- General notifications
- Scheduler feedback emails
- User role updates
- Analytics and AI emails

My Profile Settings

Profile 2FA My Teams Emails & Notification

Emails & Notifications

You can unsubscribe from receiving feedback requests

Unsubscribe Emails



Unsubscribe Scheduler Feedback Emails



Unsubscribe Notifications Emails



Unsubscribe User Role Update Emails



Unsubscribe Analytics & AI Emails



Unsubscribe Reetro Tips & Tricks Emails



Unsubscribe Action Item Assigned Notifications



Unsubscribe Action Item Status Notifications



BILLING AND ORGANISATIONAL SETTINGS

Customize platform preferences, including billing, integration with third-party tools, data retention policies, and scheduling for automated retrospectives.

The screenshot displays the 'Billing & Organizational Settings' page. On the left, a sidebar contains navigation icons for Home, Profile, Clock, Settings, and a user profile. The main content area is titled 'Billing & Organizational Settings' and features a 'Billing' tab. Below the tab are three pricing tiers: 'Free', 'Pro', and 'Enterprise'. The 'Free' tier is 'Forever free' and costs '\$0 /month'. The 'Pro' tier is '\$27/Month' and is selected. The 'Enterprise' tier is 'Depends on total users' and includes a 'Contact us at hello@reetro.io' button. Each tier lists its features with checkmarks.

Free	Pro	Enterprise
Forever free	Per team	Depends on total users
\$0 /month	\$27/Month	Contact us at hello@reetro.io
ALL "FREE" FEATURES PLUS	ALL "FREE" FEATURES PLUS	ALL "PRO" FEATURES PLUS
<ul style="list-style-type: none">✓ 5 Free Teams✓ 10 Active boards / team✓ 10 Team members / team✓ 50 Guest users / team✓ Unlimited read-only users✓ Unlimited read-only Guest users✓ 1 super admin/ org✓ 1 team admin /team✓ Limited updates✓ Limited support	<ul style="list-style-type: none">✓ SSO integrations with Okta, Azure AD, Onelogin, Gsuite✓ API integrations with JIRA, Azure boards, Confluence✓ Global configurations✓ Export to JIRA, Confluence, Trello & Azure✓ Monthly penTest & security reports✓ Advanced polls & health checks✓ Audit logs✓ Enhanced security &	<ul style="list-style-type: none">✓ All Pro Features PLUS✓ Unlimited teams✓ Unlimited boards✓ Unlimited Team members✓ Unlimited Super admins✓ Unlimited team admins✓ Unlimited Guest users✓ 24/7 priority support (email, chat, phone)✓ ISO-27001 & SOC-2

MY TEAMS

The My Teams tab helps you manage your team memberships and roles.

Features include:

- **Team Membership Overview:** View a list of all companies and teams you are part of.
- **Switch between companies** using the toggle at the top of each section.
- **Manage Teams:** See team names and roles (e.g., Super Admin).
- **Use the refresh icon** next to team names to update team information.
- **Active Company:** Toggle between active companies to focus on specific memberships.

TEAM MEMBER RESPONSIBILITIES

As a Team Member in Reetro, you can view features, participate in retrospectives, and contribute to discussions by adding cards and providing feedback on the board. Your role ensures smooth collaboration by sharing insights and engaging with team activities.



TEAM MANAGEMENT & FEATURES

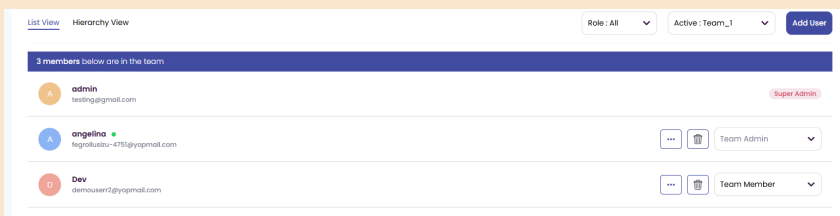
You can view the team you are part of.

Access the List View and Hierarchy View to understand team structure

USER MANAGEMENT

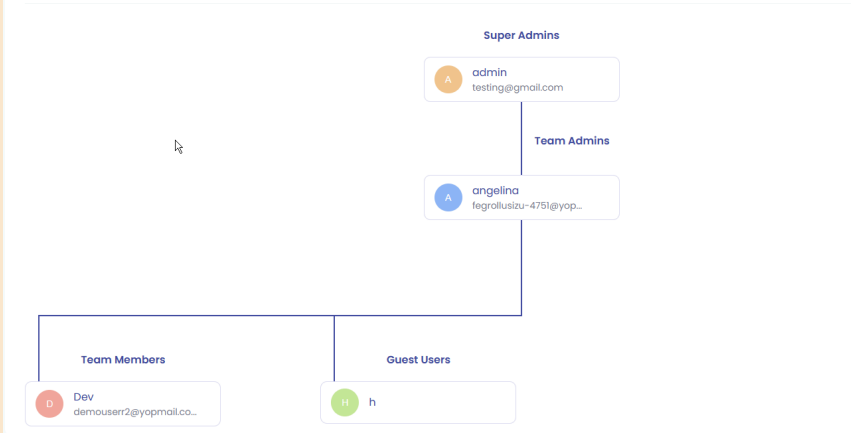
You can see a list of team members in your assigned team.

You cannot add, remove, or change user roles.



The screenshot displays a user management interface. At the top, there are tabs for 'List View' and 'Hierarchy View', with 'List View' selected. On the right, there are dropdown menus for 'Role : All' and 'Active : Team_1', and an 'Add User' button. Below this is a blue header bar stating '3 members below one in the team'. The main content area shows a list of three team members:

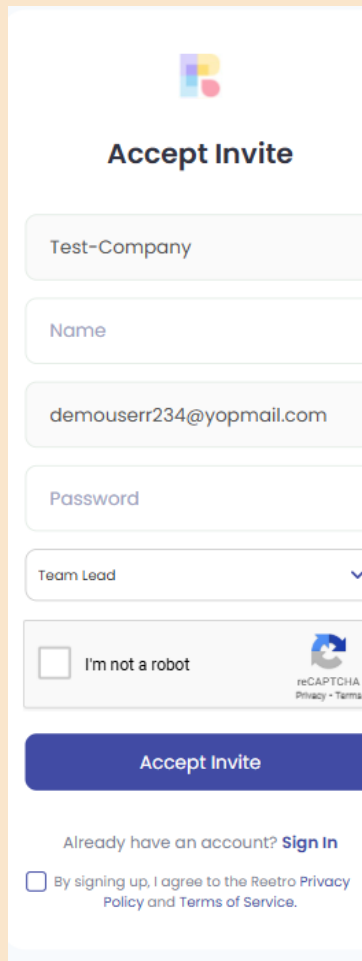
Name	Email	Role
admin	test1ng@gmail.com	Super Admin
angelina	fegrollabzu-475@gmail.com	Team Admin
Dev	demouser2@gmail.com	Team Member




ACCEPTING AN INVITE TO REETRO

- Open your email inbox and locate the invite email sent by Reetro.
- Click on the invitation link provided in the email.
- Fill out the form on the invitation page:
- Company Name: Verify the company name displayed.
- Name: Enter your full name.
- Email: This will be pre-filled based on the invite.

- Password: Create a secure password.
- Role: Select your role from the dropdown (e.g., Team Lead).
- Complete the CAPTCHA by selecting "I'm not a robot."
- Click the Accept Invite button to join your team.



The image shows a mobile application form titled "Accept Invite". At the top is a logo consisting of four colored squares (purple, yellow, blue, red) arranged in a 2x2 grid. Below the logo is the title "Accept Invite" in bold black text. The form contains several input fields: a text field with "Test-Company", a text field with "Name", a text field with "demouser234@yopmail.com", a text field with "Password", and a dropdown menu with "Team Lead" and a downward arrow. Below these is a reCAPTCHA section with an unchecked checkbox, the text "I'm not a robot", and the reCAPTCHA logo with "reCAPTCHA Privacy + Terms" text. At the bottom is a large blue button with the text "Accept Invite". Below the button is the text "Already have an account? Sign In" and a checkbox with the text "By signing up, I agree to the Reetro Privacy Policy and Terms of Service."



Accept Invite


Test-Company

Name

demouser234@yopmail.com

Password

Team Lead ▾

I'm not a robot 
reCAPTCHA
Privacy + Terms

Accept Invite

Already have an account? [Sign In](#)

By signing up, I agree to the Reetro Privacy Policy and Terms of Service.

USER ROLES AND PERMISSIONS

Role	Description	Permission
Super Admin	Full control over the account, including all teams and users.	<ul style="list-style-type: none">• Manage all teams and users• Access billing details• Change account setting• Upgrade plans and manage subscriptions
Team Admin	Manages a specific team and its members	<ul style="list-style-type: none">• Add or remove team members• Assign roles within the team• Monitor team activity• Manage team-specific settings
Team Member	Collaborates on boards in a teams	<ul style="list-style-type: none">• Give feedback on Retrospective Meeting• Perform actions on board• Can remove their self from team
Guest User	Temporary access to specific public board	<ul style="list-style-type: none">• Perform ableto actions on board
Read Only Users	Have only view access to Boards and Teams	<ul style="list-style-type: none">• Can't perform any action on boards

A USER CAN HOLD DIFFERENT ROLES IN DIFFERENT TEAMS

Users can be assigned varying levels of access and responsibilities based on the specific needs of each team. For instance, a user might be a Team Admin in one team, allowing them to manage that team's members and activities, while being a Team Member in another team, where they contribute without administrative privileges.

UNDERSTANDING ACTIVE TEAMS

Active teams refer to the team currently using the reetro. Only one team can be active at a time.

HOW TO VIEW ACTIVE TEAMS

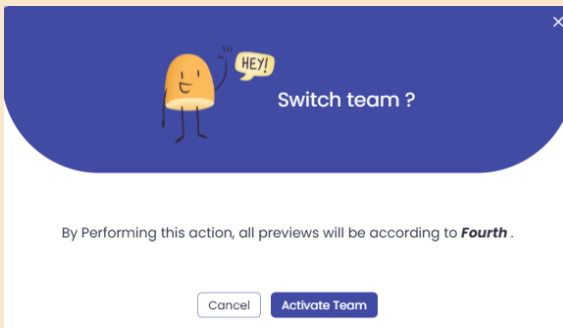
- Go to the Team & User Management page.
- The active team is marked as “Active” in the list.
- Click on any team to view its details, such as members, activity.

Managing Active Teams:

- **Activate a Team:** Only one team can be active. If you need to change the active team, deactivate the current one and activate the new team.
- **Add/Remove Members:** Update team members as needed.

HOW TO ACTIVATE TEAM

- Go to the Team & User Management page.
- Click on the Toggle button.
- A Switch Team popup will appear.
- Click on the Activate Team button.



TEAM PROFILE

- The Team Profile page provides an overview of the team and its key details:
- Team Name: Displays the name of the team (e.g., "Team_1").
- Created Date: The date the team was created.
- Role: Your role in the team (e.g., "SUPER ADMIN").

PLAN INFORMATION

- Current plan type (e.g., "Free").
- Option to upgrade or change the plan by clicking Change Plan.

MEMBER SUMMARY

- Super Admins: Number of super admin users (e.g., 1).
- Team Admins: Number of team admins (e.g., 1).
- Total Team Members: Total users in the team.
- Read-Only Users: Members with restricted, read-only access.
- Guest Users: External collaborators with guest access.
- Total Boards: The number of boards under the team.

LEAVE TEAM OPTION

You can leave the team by clicking Leave Team.

⚠️ **Note:** Leaving the team will revoke your access to all boards under the team.

The screenshot displays a 'Team Profile' page for 'Team_1' as of Wednesday, Jan 11, 2023. The user's role is 'TEAM ADMIN'. The page is divided into several sections:

- Your plan details:** Shows the current plan as 'Free' with a 'Change plan' button.
- Team Statistics:** A grid of four boxes showing: Super Admins: 1, Team Admins: 1, Total Boards: 2, Total Team Member: 1, Read Only: 0, and Total Guest Users: 1.
- Leave Team_1 team:** A section with the text 'By leaving this team, you will lose access to all its board.' and a 'Leave Team' button.

VIEW ALL BOARDS

Access all the boards associated with your account, categorized based on their status or visibility.

STARRED BOARDS

Quickly access boards you've marked as favorites by starring them.

ACTIVE BOARDS

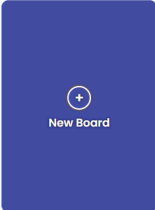
Displays the currently Active Board, such as Demo Team.

Allows you to view or manage the board's details and associated data.


PUBLIC BOARDS

View boards that are publicly accessible to anyone with the link.

[All Boards](#) [Starred Boards](#) [Public Boards](#)




+
New Board




Retrospective 01.11

Modified by Admin on Nov 15 24




k Copy

Modified by Admin on Nov 1 24



k

Modified by Admin on Nov 1 24



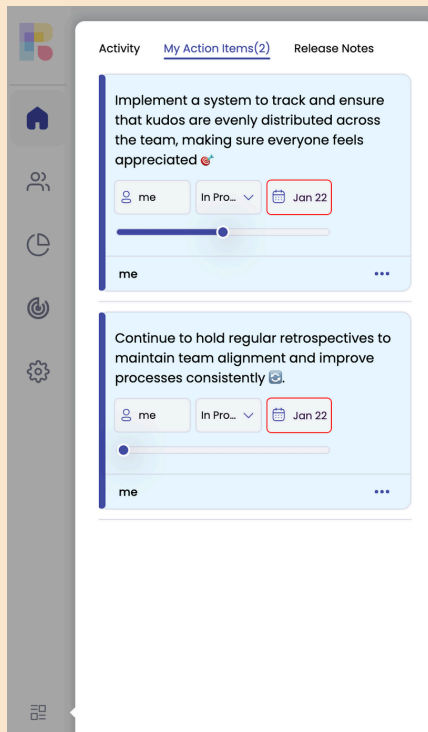
Retrospective 20.09

Public

Modified by Admin on Nov 1 24

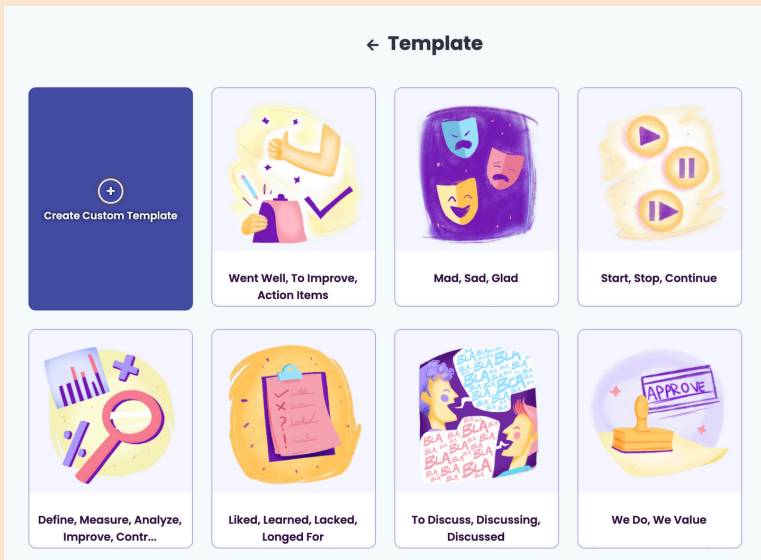
ACTION ITEMS

Manage tasks by adding descriptions, setting priority levels, and assigning deadlines. You can assign tasks to team members, track their progress with a progress bar, and monitor the task status—whether it's 'To Do,' 'In Progress,' or 'Done.'



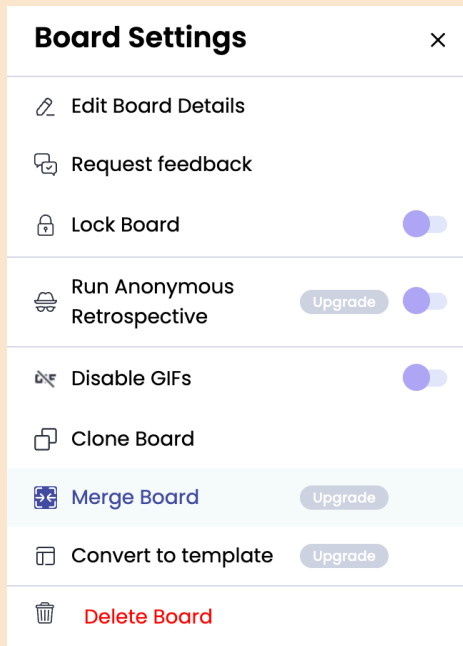
BOARD CREATION

You can choose from predefined templates or create your own custom templates. Depending on your retrospective needs, you can select either a standard board or a phase board to organize and structure your tasks.



BOARD SETTINGS

Customize board preferences by editing board details, requesting feedback, locking boards, and running anonymous retrospectives for a more private discussion. You also have the ability to clone, merge, or delete boards as needed to streamline your workflow



JOIN A RETROSPECTIVE MEETING ON A STANDARD BOARD

Add Cards

Text Cards: Add cards for feedback, comments, or discussion points.

GIFs

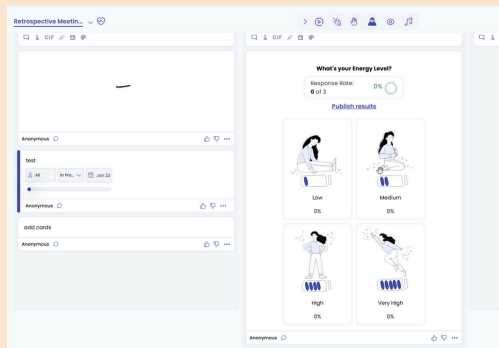
Use GIFs to lighten the mood or express feedback in a fun way.

Kudos

Recognize team members by adding kudos cards to celebrate accomplishments.

Canvas

A free-form space for brainstorming, mapping out ideas, or visual collaboration.



CARD ACTIONS ON A BOARD

Insert Link

Add a hyperlink to a card for quick access to relevant resources or external pages.

Edit Card

Modify the content of the card (text, title, etc.) as needed.

Duplicate Card

Create a copy of the card to use in another location or for repeating actions.

Move Card

Drag or shift the card to a different column or section on the board.

Switch Type

Change the type of card (e.g., from text to action item or poll) to fit different needs.

Export

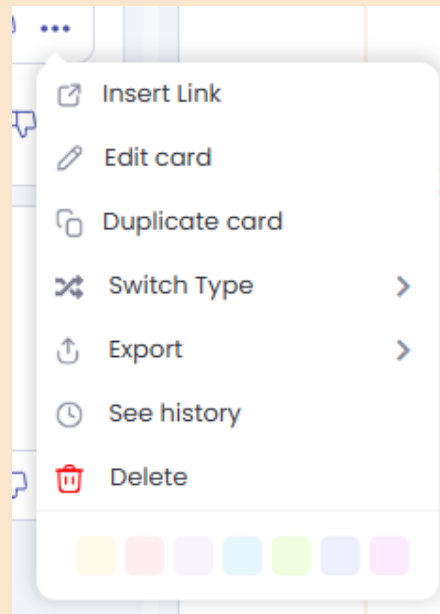
Export the card's content to Jira & Azure

See History

View the edit history of the card to track changes and updates.

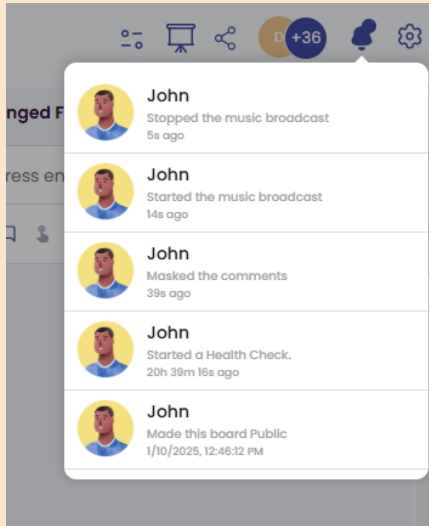
Delete

Remove the card from the board if no longer needed.



BOARD NOTIFICATIONS

Click on the notification icon to see all notifications related to the board. This will display updates, comments, actions, and any other changes or alerts.

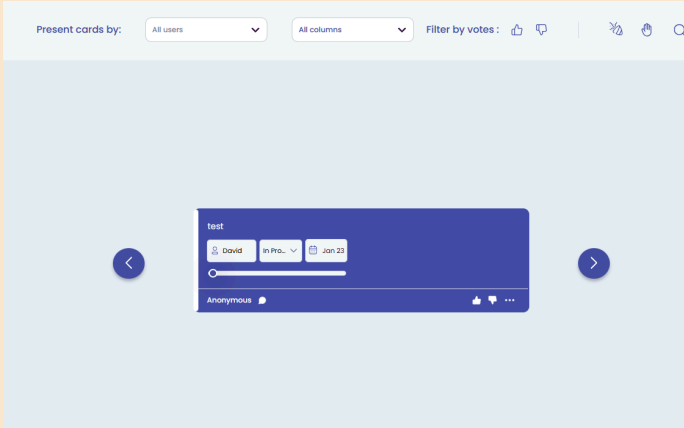


PRESENTATION VIEW

- Click on the Presentation Icon
- When you click on the Presentation Icon, a popup window will open.
- View All Cards
- In the popup, users can see all cards across the board and columns.

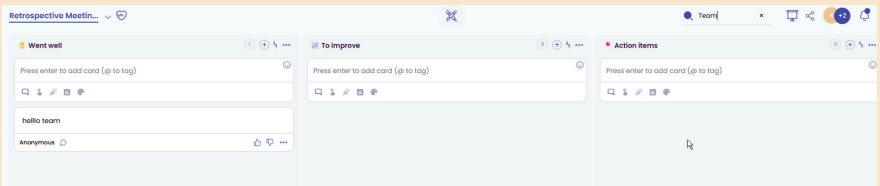
SET FILTERS

- Users can apply filters by votes to focus on specific cards (e.g., showing cards with certain vote counts).
- You can set filters to Users and columns as well



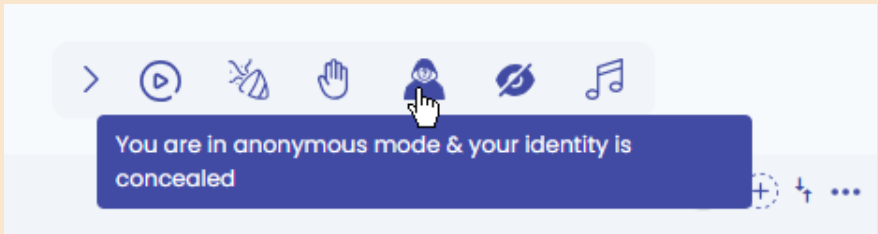
SEARCH ON BOARD

- Click the Search Icon.
- Type keywords or card titles.



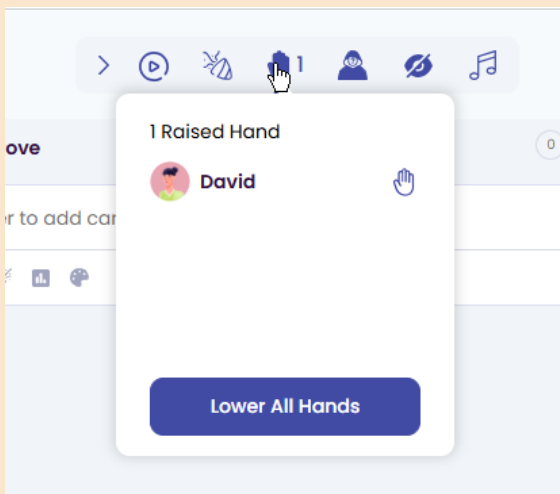
MAKE ME ANONYMOUS

To make yourself anonymous, click on the anonymous icon.



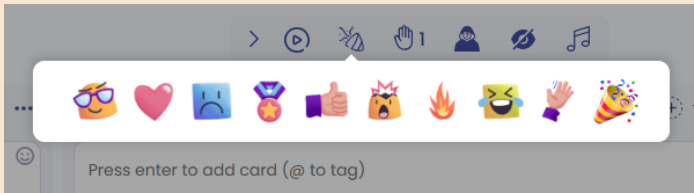
RAISE HAND

To raise your hand during the session, simply click on the hand icon.



REACTIONS

Click on the reaction icons (e.g., thumbs up, thumbs down, heart, etc.) to provide feedback or express your thoughts.

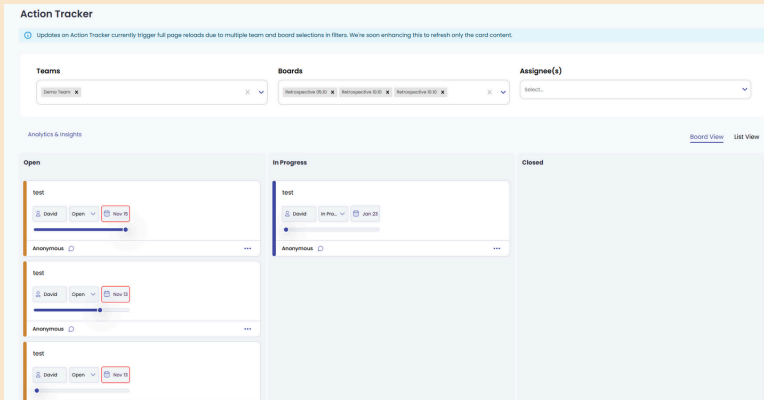


COMMENT AND VOTING

Comment on cards to provide feedback and vote on them to help prioritise tasks. See who authored each card and easily track the voting results, allowing you to stay informed and participate in decision-making.

ACTION TRACKER

The Action Tracker helps manage and monitor tasks across teams and boards.



Filters:

Teams: Select one or more teams.

Boards: Filter tasks by boards.

Assignee(s): Narrow tasks by assigned users.

Task Categories:

Open: Tasks yet to start.

In Progress: Ongoing tasks.

Closed: Completed tasks.

List View: Simplified list format.

Task Cards: Details: View title, assignee, due date, and progress bar.

Actions: Update status, add anonymous comments, or edit via the ellipsis menu.

View Options: Board View: Tasks in columns by status. List View: Simplified list format.

Analytics & Insights			Board View	List View
Open				
DESCRIPTION	ASSIGNEE	DUE DATE	URGENCY	PROGRESS
test	David	Fri, Nov 15, 2024	important	100%
test	David	Wed, Nov 13, 2024	important	71%
test	David	Wed, Nov 13, 2024	important	0%
test	David	Wed, Nov 13, 2024	important	0%
test	David	Wed, Nov 13, 2024	important	0%
test	David	Wed, Nov 13, 2024	important	0%
In Progress				
DESCRIPTION	ASSIGNEE	DUE DATE	URGENCY	PROGRESS
test	David	Thu, Jun 23, 2025	standard	0%
Closed				

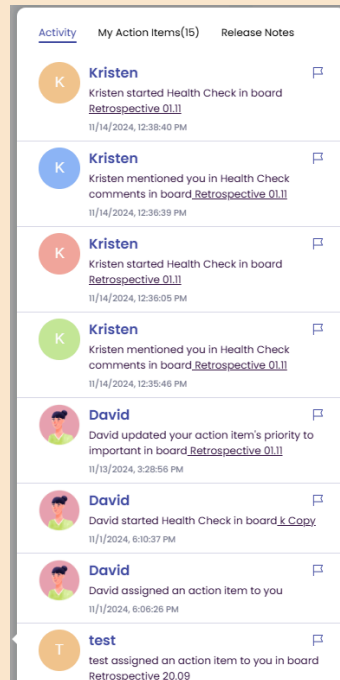
ACTIVITY POPUP

The activity Popup in the Activity section helps users track updates, tasks, and interactions within the system.

FEATURES OF THE INACTIVITY POPUP

1. My Action Items (15)

This section displays a summary of your pending action items.



Number in parentheses (15): Indicates the total number of tasks assigned to you that are yet to be completed.

Action: Click on this section to view, manage, and update the status of your tasks.

2. Release Notes

This section provides important updates and information about the latest changes or enhancements in the system.

Click on "Release Notes" to view the detailed version history. Each release note includes the version number and key updates or fixes.

Activity My Action Items(59) Release Notes

Release #3.4.1 (Thu, Jan 11)

This update focuses on critical bug fixes and UX improvements: **Bug Fixes**

- Prevented actions on locked boards.
- Fixed incorrect redirection during Azure exports.
- Resolved max votes issue in Edit Profile.
- Fixed SSO popup upgrade navigation to Billing.
- Addressed overlay glitches on boards.
- Enforced column limits on free plans.
- Prevented vote limit breaches via repeated requests.
- Made board and team search case insensitive.
- Stopped redundant API calls for drag-and-drop actions.
- Fixed duplicate API calls for Kudos and Polls.
- Resolved duplicate team entries after invite acceptance.
- Fixed guest user access to settings via upgrade button. **Enhancements**
- Added hover effects to Activity Menu notifications.

3. User Activity (e.g., Kristen)

This section highlights activities performed by users within the system.

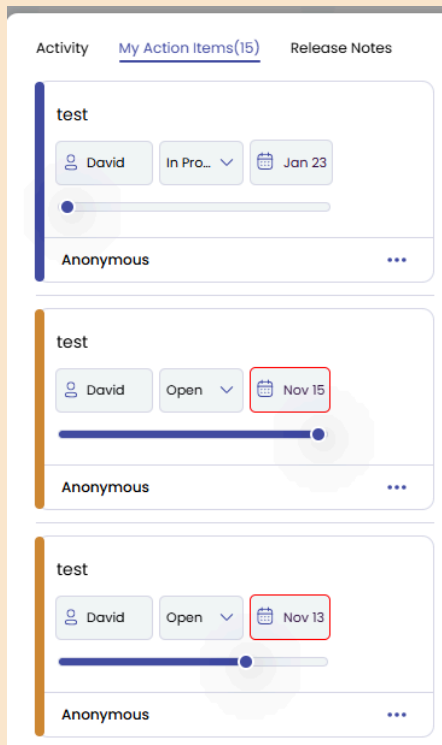
Example Activity:

Kristen started a Health Check in the "Retrospective 01.11" board.

Purpose:

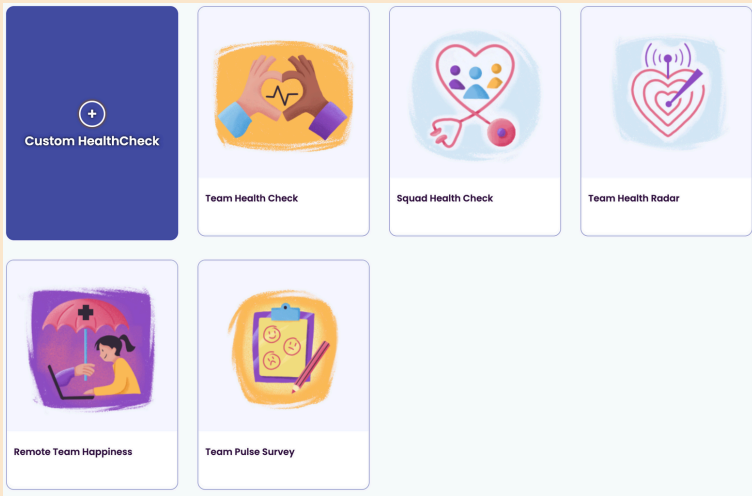
Provides transparency and context for team activities.

Helps team members stay informed about ongoing actions.



HEALTH CHECK

Assess board engagement and team morale by tracking activity and user interactions. You also have the option to create custom health checks for more personalised evaluations, helping you stay on top of the team's progress and well-being.



INSIGHTS AND ANALYTICS

Access detailed analytics on board and team performance, including meeting summaries, insights from the action tracker, and real-time team pulse metrics. This helps you stay informed about progress and areas that may need attention.

