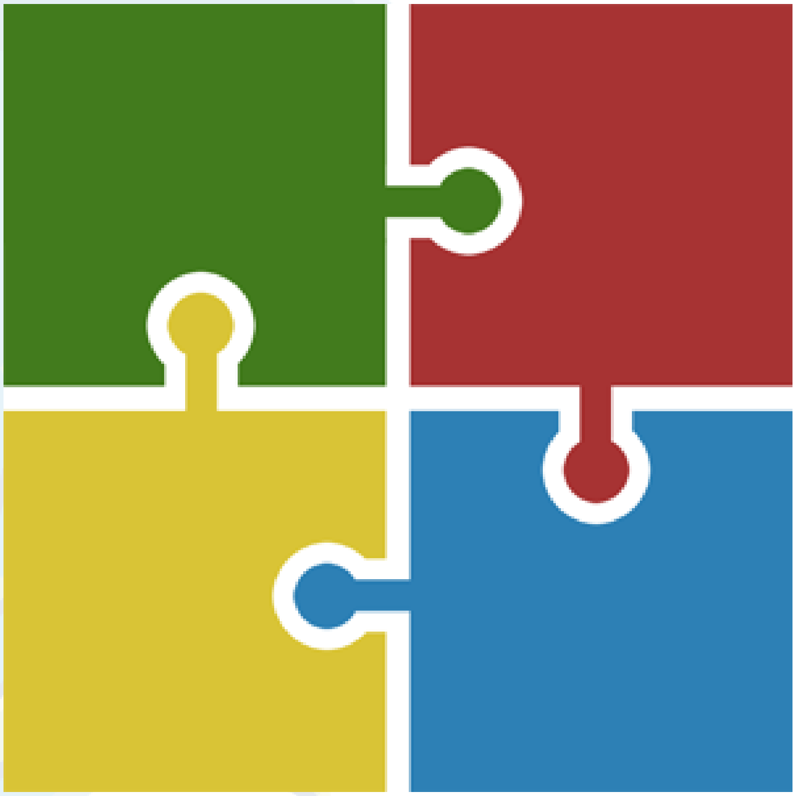
Feb 1, 2016

Collaborative Tools

Administration Help Document



University of California
Division of Agriculture and Natural Resources

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Collaborative Tools$^{3.0}$ Administration Help Document

1. Collaborative Tools

1.1 Accessing Collaborative Tools

To enter Collaborative Tools, open your browser of choice.

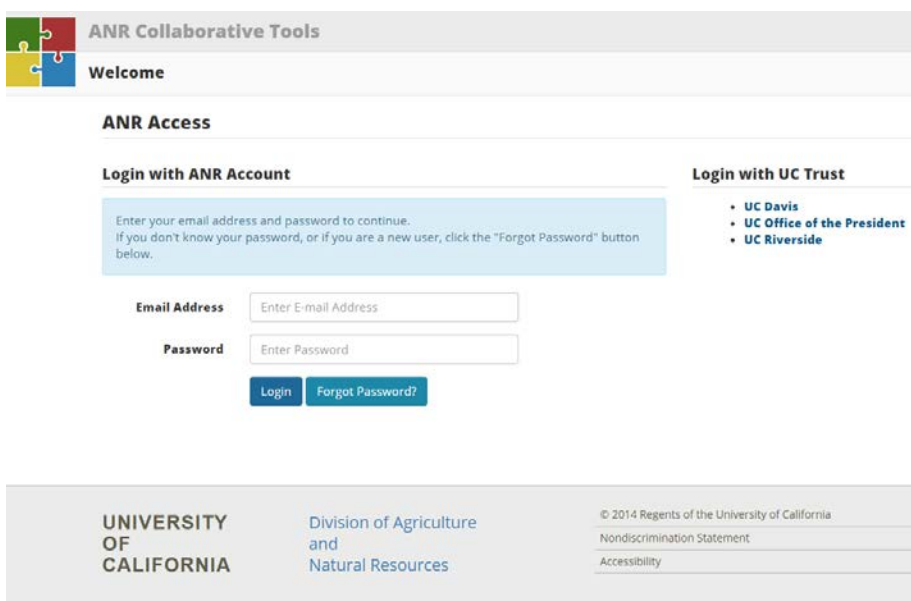
There are two ways to get to Collaborative Tools:

1. The ANR Portal is located at http://ucanr.org/portal. After logging into the ANR Portal, select the group you would like to participate in. If you do not have any groups listed on your Portal, the link to Collaborative Tools will be in the right column under Useful Tools.
2. If you do not use the ANR Portal, go to http://ucanr.org/collaborate. If you are logging in without the Portal, you will come to a login page for Collaborative Tools. (Note: Not only does it log you into Collaborative Tools, it also logs you into the ANR Portal)

After logging into Collaborative Tools, you can visit your home page at any time. This page allows you to create new discussion groups, go directly to existing discussion groups, manage your profile, and return to the ANR Portal.

1.2 General Collaborative Tools Navigation Terms

Useful explanation of the navigation items you'll find in Collaborative Tools.



Discussion - Collaborative Tools is primarily an online discussion tool. It was developed to allow private groups to communicate online and archive discussion topics. Any single discussion thread starts with a subject. This is the topic that dictates the discussion to follow. When creating a new discussion subject, you will be creating a brand new thread. Alternately, you can add to a discussion, which will place your comment in your current discussion thread.

Documents - You can store documents on Collaborative Tools either in groups or with version control. The version control allows you to build on a single document, such as the creation of a research paper or administrative handbook.

Calendar - Collaborative Tools features calendar and event planning features. You can assess the availability of your group members using the planning tool and then create an event based on the plan.

Tasks - This project management tool allows you to use Collaborative Tools to create and manage the details of any project. You can assign duties and timelines.

Members - Collaborative Tools is a private, secure system that allows you to invite anyone you like to your group for discussions. Every new member is given an account when invited to the group, if they do not already possess one. Group members must log into the system in order to participate. Any member can be made an administrator of the group, which allows access to discussion moderation, event creation and other features.

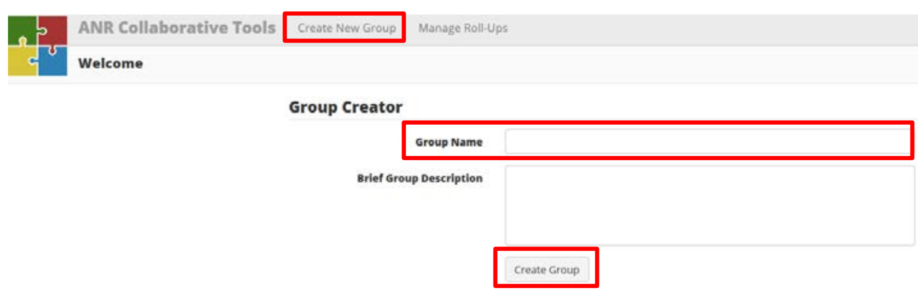
Edit Roster (admin only) - This section allows you to invite new members to your group and manage the current list of members. You can edit the invitation message, assign administrative rights and remove members in this area.

Edit Group (admin only) - The group editor allows you to create different categories for your discussions and manage a few properties for the group.

2.0 Creating a Group

Note: If you are a Master Gardener, 4H volunteer or not employed by ANR, you will not be able to create new discussion groups. Contact your group owner or program coordinator about setting up another group on the system!

1. Go to the Collaborative Tools homepage.
2. Click **Create New Group** on the top navigation bar.
3. Enter a group name and a group description.
4. Click **Create Group**. You are now ready to add members to your group.

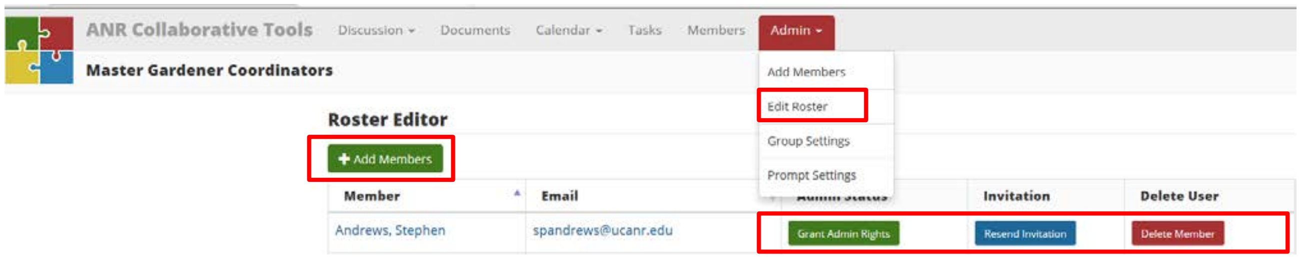


5. On the **Add New Members** page, first prepare your Group Invitation Message. This will be an email sent to the people you have decided to add to your Group. Once you have written the message, click **Save Message**.
6. Next, add your recipient email addresses, using commas to separate the addresses and click **Add New Email Addresses**. You will also be able to either add members from an ANR Directory or from ANR Workgroups. You may also copy the members from another Collaborative Tools group.

3.0 Editing Roster

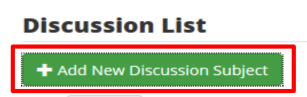
Once a roster is established it can be edited to grant **Administrative Rights** and **Delete Members**. Administrators have the ability to moderate discussions, delete files and messages, add and delete members and edit the group's properties. Owners are administrators that cannot be deleted from the group. Owners are also the only administrator that can change the owner of the group as well as delete the group.

You can also resend email invitations from this list, in case anyone forgets how to access the group.

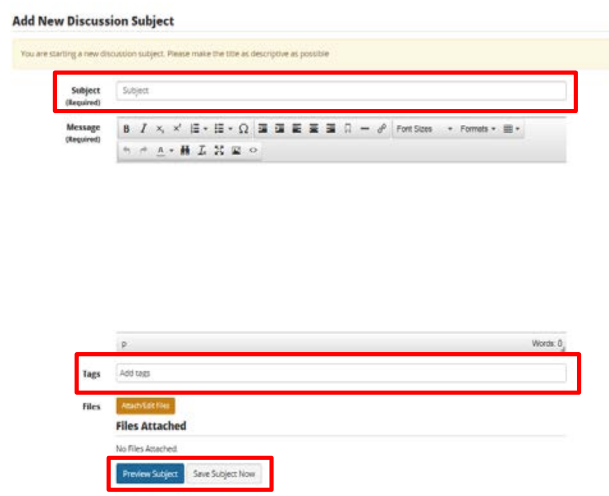


1. Go to the Collaborative Tools homepage.
2. On the Collaborative Tools Groups list, click your group name. This will take you to that group's **Discussion List**.
3. Click **Admin** from the top navigation bar.
4. Click **Edit Roster.** You are now ready to: **Add Members, Grant Admin Rights, Resend Invitation or Delete a Member.**

4.0 Adding a New Discussion in a Group



1. Go to the Collaborative Tools homepage.
2. On the Collaborative Tools Groups list, click your group name. This will take you to that group's **Discussion List**.
3. Click **Add New Discussion Subject**.
4. Enter a Subject.
5. In the Message box, type a message.
6. If you like, you may enter tag names in the Tags textbox. **Tags** will help organize your group's discussions, see *Sections 5.2 Tags* for more information.
7. Click **Upload File** if you'd like to include an attachment.
8. Click **Preview Subject** to read your post without posting to the **Discussion List**.
9. Click **Save Subject Now** to post your message to the **Discussion List**.

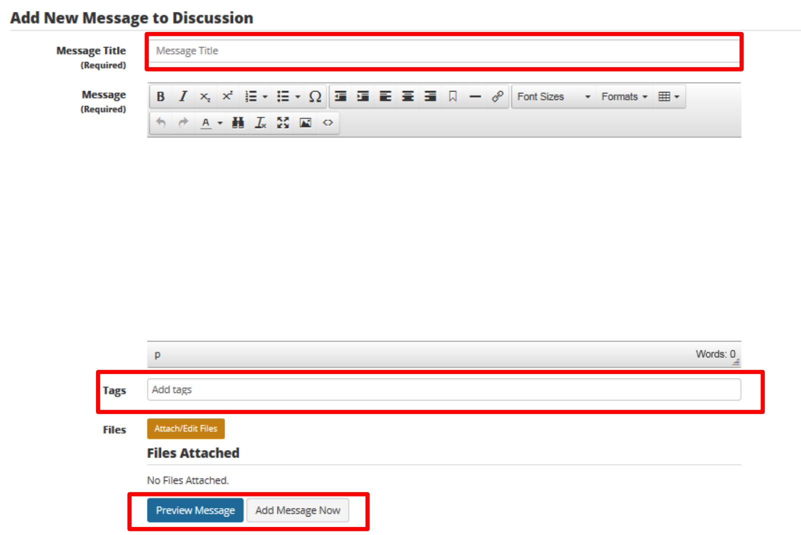


5.0 Adding to a Discussion

5.1 Adding to a Discussion

1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. From the **General Discussion List**, select the title of the discussion you wish to reply to.

4. Click **Add to Discussion.**
5. In the **Message Title box**, type a title.
6. In the **Message box**, type your message.
7. You may add tags to your message using the **Tags textbox**. Tags may help organize your posts.
8. Click **Preview Subject** to read your post without posting to the Discussion List.
9. Click **Save Subject Now** to post your message to the Discussion List.
10. Once your message has been posted, if you change your mind, you may click **Delete** to remove your message.
11. Once posted messages cannot be edited.



5.2 Tags

Discussions can be tagged similarly to how the ANR Blog system works. Tags are a useful way to group related posts and quickly tell readers what the discussion is about. Essentially tags are keywords used to classify content making it more searchable. Tags are generally chosen informally by the item's creator.

6.0 Collaborative Tools Notifications

Collaborative Tools uses email to connect the members of your group. Each time a message is saved, emails are delivered to your members. If the user has already logged into the ANR Portal or Collaborative Tools, the emails with return links will give them one-click access into the group. If no log on is found, the user will be momentarily stopped and asked for a username and password. Once successfully logged in, they will be routed to the page initially requested.

There are three basic types of emails that will come from Collaborative Tools, and a couple of ways your group members can manage them.

1. The invitation email contains the text you enter prior to adding your members to the roster as well as a link that will bring the new member directly to your main list of messages.
2. The new message email is delivered every time a new subject is created or a message is added to a subject. It contains the text from the message, an indication if there are documents associated with the message, and two links back to Collaborative Tools. One link goes to the message in Collaborative Tools, and the other link goes directly to a form so the member can respond to the message.
3. Collaborative Tools also has a generic email feature. It allows you to send an email to your group without recording it in the list of subjects.

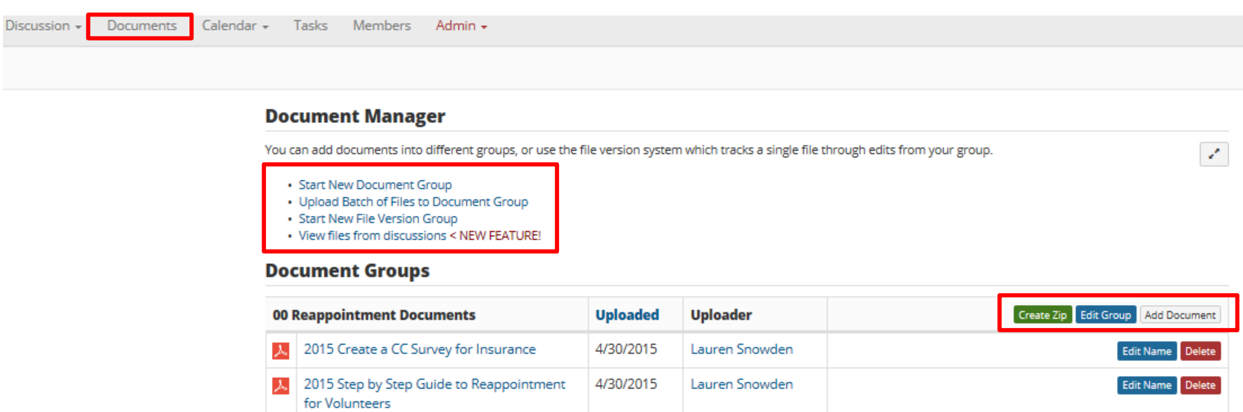
Members can manage the receipt of emails in two ways, either by unsubscribing to individual subjects, or turning off emails for the entire group.

7.0 Posting Documents

7.1 Posting Documents

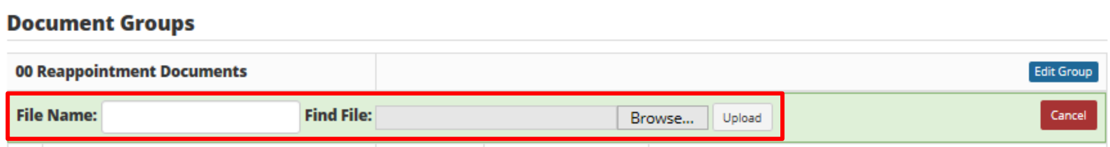
Collaborative Tools features a file management system, allowing you to store documents for your group and track versions of documents as they are developed. The file system does NOT automatically send emails when documents are uploaded. You must create a message to alert your group members that the files are uploaded if you want to let them know.

1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. In the top navigation bar, click **Documents**.



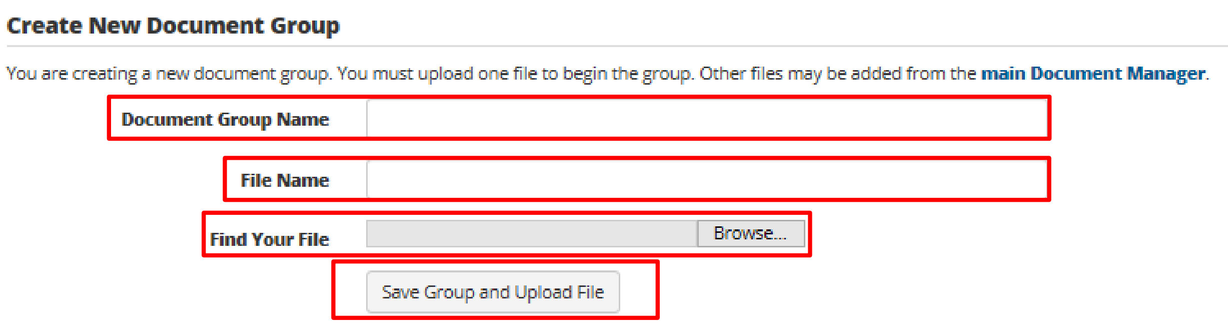
7.2 Add a Document to an Existing Document Group

1. Click **Add Document**.
2. Enter a name for your file in the **File Name** textbox.
3. Click **Browse** and navigate to the file you wish to upload.
4. Click **Upload**.



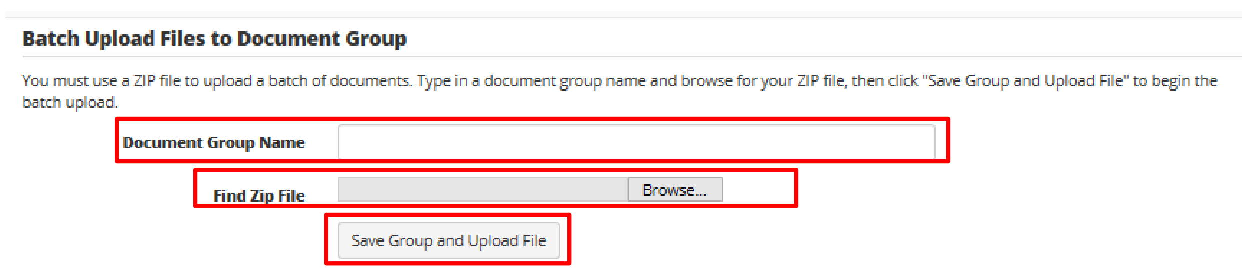
7.3 Start a New Document Group

1. Click **Start New Document Group**.
2. Enter a name for your **Document Group** in the Document Group Name textbox.
3. Enter a name for the file you wish to upload in the **File Name** textbox.
4. Click **Browse** and navigate to the file you wish to upload.
5. Click **Save Group and Upload File**.



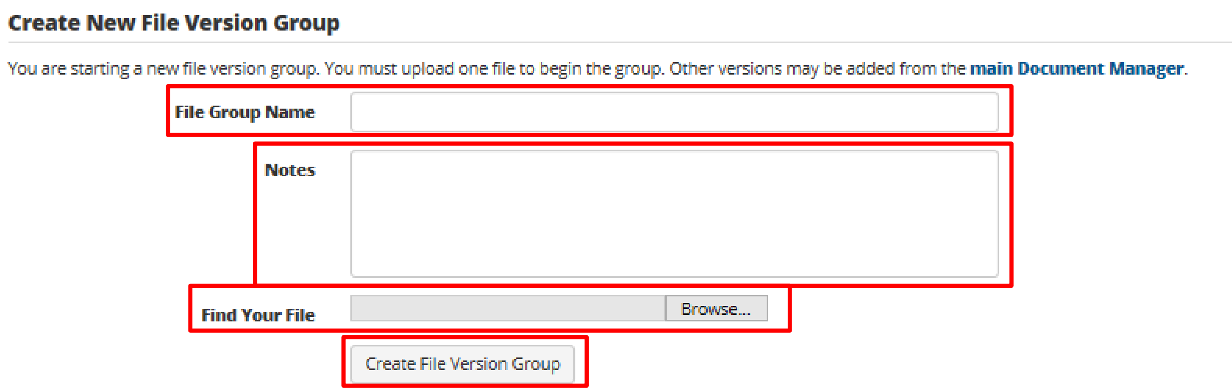
7.4 Batch Upload Files to a Document Group

1. Click **Upload Batch of Files to Document Group.**
2. You must use a ZIP file to upload a batch of documents.
3. Enter a name for your Document Group in the **Document Group Name** textbox.
4. Click **Browse** and navigate to the Zip file you wish to upload.
5. Click **Save Group** and **Upload File**.



7.5 Track a Single File that is Being Edited by your Group

1. Click **Start New File Version Group**.
2. Enter a name for your File Group in the **File Group Name** textbox.
3. Enter any pertinent notes in the **Notes** textbox.
4. Click **Browse** and navigate to the file you wish to upload.
5. Click **Create File Version Group**.

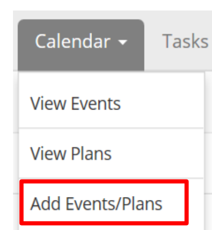


8.0 Calendar and Event Planning

8.1 Add Events/Plans
8.2 Add an Event
8.3 Add a Plan

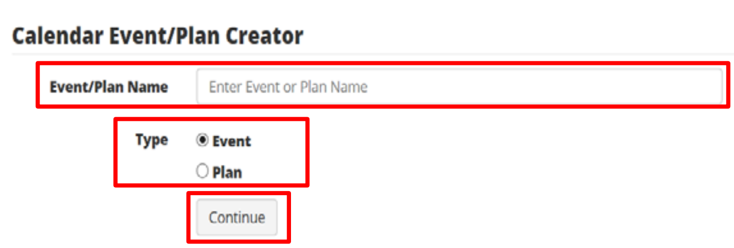
8.1 Add Events/Plans

1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. In the upper navigation bar, click **Calendar**.
4. Click **Add Events/Plans**
5. NOTE: You must have **group admin rights** to add an Event or Plan to the group.

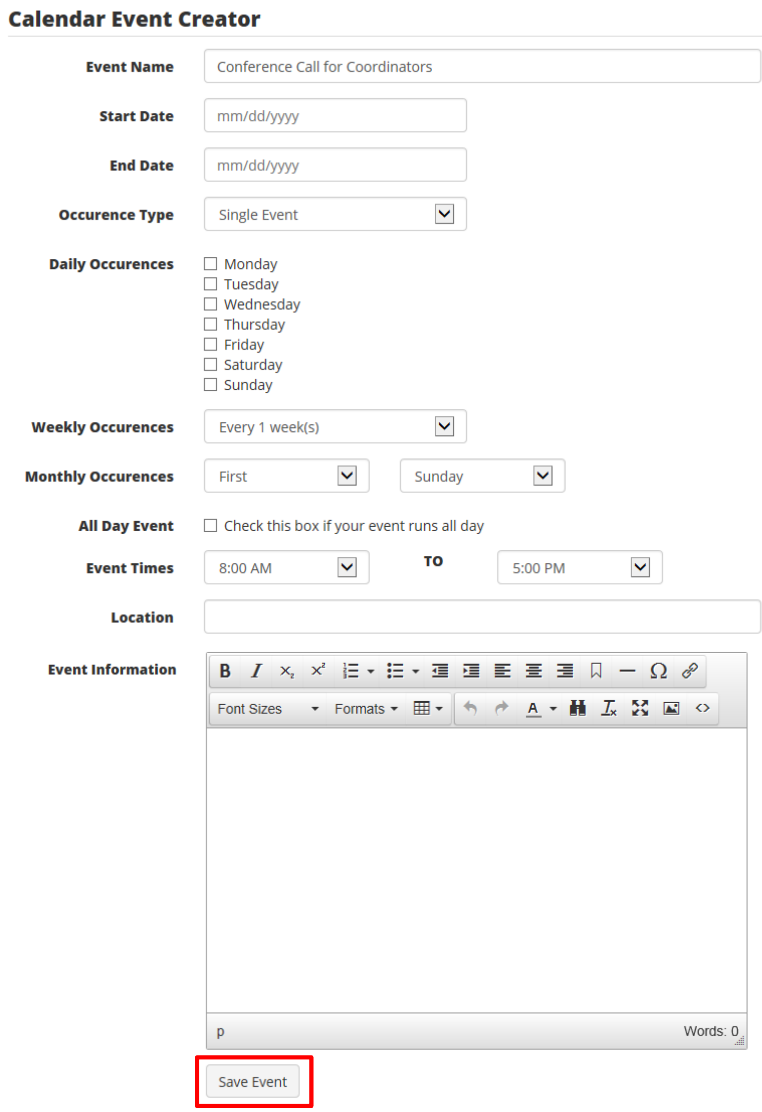


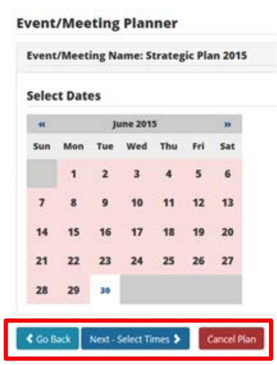
8.2 Add an Event

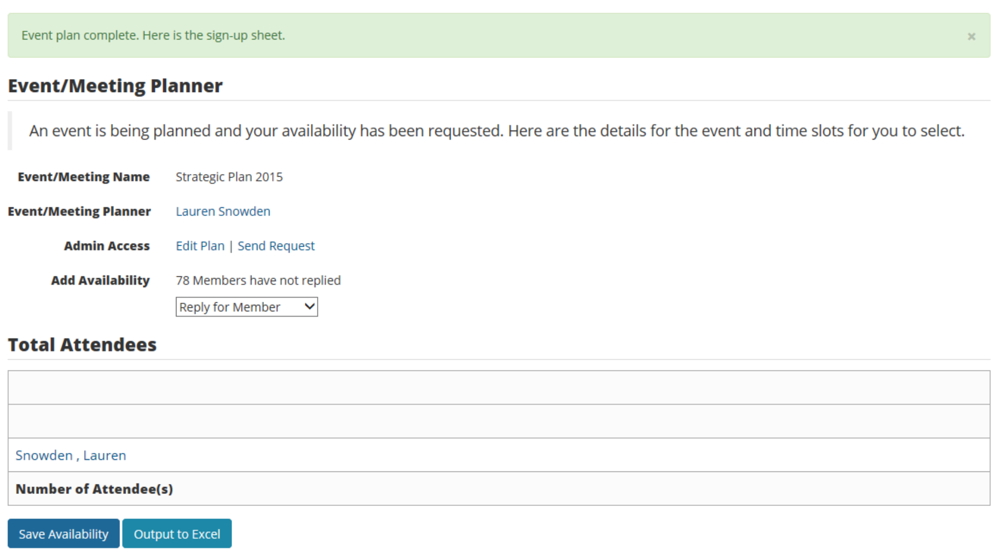
1. In the **Event/Plan Name box**, enter the title.
2. Make sure the **Event radiobutton** has been selected.
3. Click **Continue**.
4. In the **Calendar Event Creator**, enter the **Start and End times** for your Event.



5. To make the Event recurring, on the **Occurrence Type dropdown**, select the frequency **(Occurs Daily, Weekly, or Monthly)** with which the Event recurs.
6. For Events occurring multiple times a week, in **Daily Occurrences**, check the days the Event will occur.
7. For **Weekly recurrences**, select the frequency **(Every "x" Weeks)** the event will recur.
8. For **Monthly recurrences**, select the week **(First, Second, Third, Fourth)** and the day **(Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday)** the Event occurs each month.
9. Check **All Day Event** if your Event will run all day. Otherwise...
10. Select the **Event Times** for your Event.
11. In the **Location box**, enter the location.
12. In the **Event Information box**, enter any pertinent information related to your Event.
13. Click **"Continue"**.

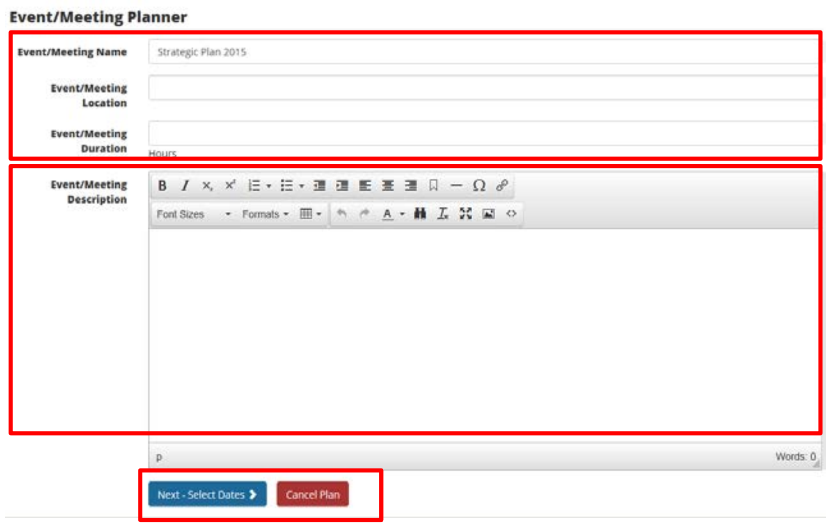


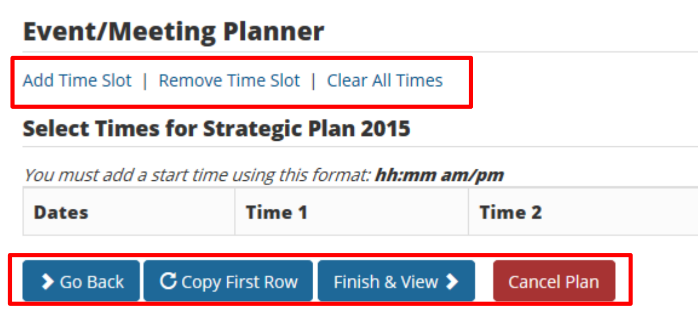




8.3 Add a Plan

1. In the **Event/Plan Name box**, enter the title.
2. Make sure the **Plan radio button** has been selected.
3. Click **Continue**.
4. In the **Event/Meeting Name box**, enter a name for your Event or Meeting.
5. In the **Event/Meeting Location box**, enter a location.
6. In the **Event/Meeting Duration box**, enter how many hours your Event or Meeting will last.
7. In the **Event/Meeting Description box**, enter a description for your Event or Meeting.
8. Click **"Next - Select Dates"**
9. On the **Select Dates calendar**, select the date or dates you wish to hold your Event or Meeting.
10. Click **"Next - Select Times"**.
11. In **Select Times for Plan**, add the time of day your Event or Meeting will be held. NOTE: you MUST use **hh:mm am/pm** formatting.
12. Click **"Finish & View"**





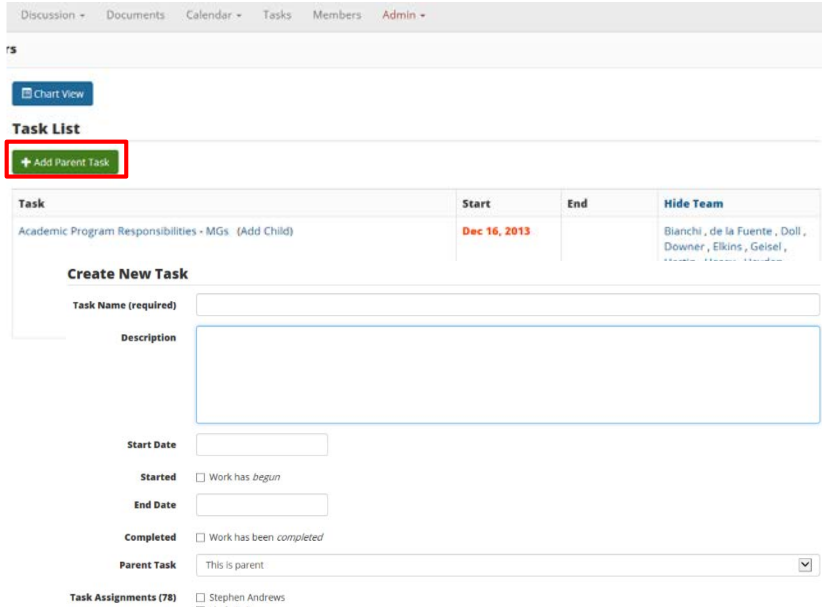
9.0 Task Management

The Task Management feature in Collaborative Tools is useful for basic project management. Tasks can be assigned to anyone within the Collaborative Tools group. You can view your groups Tasks in Chart View, List View or Print View. To switch between views click the view links under the group heading.

To create a new task:

1. Click on the **Add Parent Task**.
2. Add a **Task Name**.
3. Add a useful **description** of the task that needs to be completed.

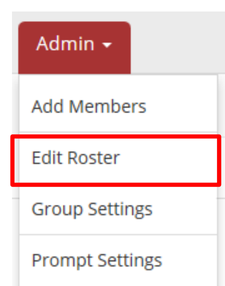
4. Set a **start and end date** for the task.
5. Don't forget to come back and mark when the task is started and finished.
6. With the parent task drop down you can add this task to an existing task.
7. Assign the task to a member of your Collaborative Tools group.
8. Click **Save your Task**.

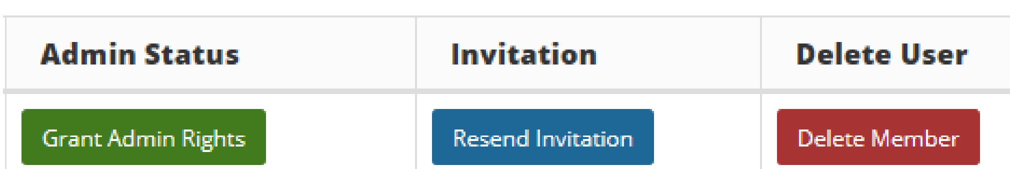


10.0 Roster Administrations

Note: Roster Administration must be conducted by an administrator!

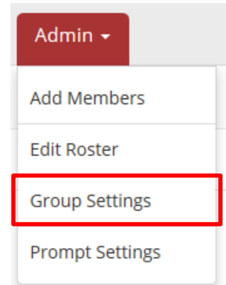
1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. In the upper navigation bar, click **Admin**.
4. Click **Edit Roster.**
5. On the **Roster Editor page** you will be able to **add or remove Admin Rights**, **send out invitations to the Group**, and **delete members**.
6. Click **Add Members** to add a new people to this group.
7. On the **Add New Members page**, first prepare your **Group Invitation Message**. This will be an email sent to the people you have decided to add to your Group. Once you have written the message, click **Save Message**.
8. Next, add your recipient email addresses, using commas to separate the addresses and click **Add New Email Addresses**. You will also be able to either add members from an ANR Directory or from ANR Workgroups. You may also copy the members from another Collaborative Tools group.



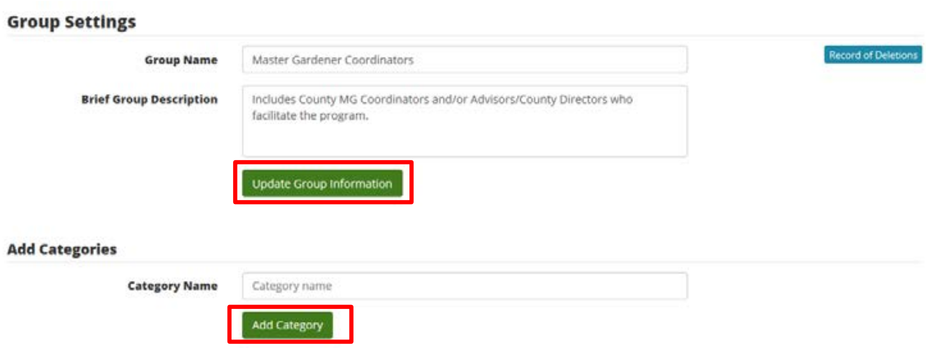


11.0 Group Administration

Note: Roster Administration must be conducted by an administrator!

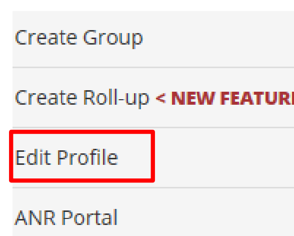


1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. In the upper navigation bar, click **Admin**.
4. Click **Group Settings.**
5. On the **Group Settings page** you may change the Group's Name, Description, or Owner.
6. If you change any of your current Group settings, click **Update Group Information**.
7. If you would like to delete the Group, click **Delete This Group**
8. If you would like to enter a new Group category, in the **Category Name box**, enter a name.
9. Click **Add Category.**



12.0 Profile and User Settings

1. Go to the Collaborative Tools homepage.
2. Under the **Collaborative Tools Groups list**, click your group name.
3. On the right-hand side of the upper navigation bar, click **your name**.
4. Click **Edit Profile**



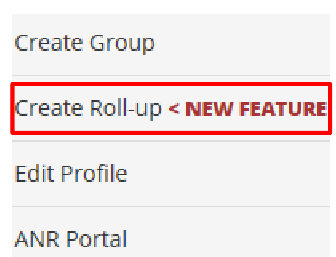
13.0 Roll-ups

13.1 Roll ups

13.2 Create a Roll-Up

13.1 Roll-ups

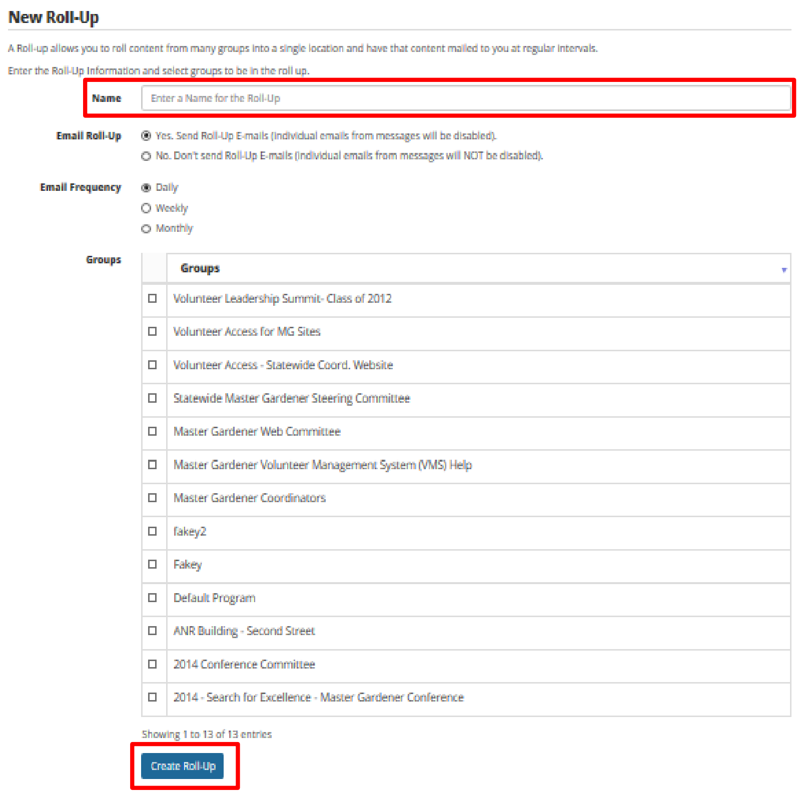
Roll-Ups allows you to consolidate all your Collaborative Tools notifications into more manageable summary emails delivered on a regular basis. With Roll-Up activated you'll be able to:



- View a "Roll-Up" of all of the activity based on a date rage
- Set filters by group, tag, or user
- Email all users in all groups

13.2 Create a Roll-Up

1. Go to the Collaborative Tools homepage.
2. On the right-hand side of the upper navigation bar, click **your name**.
3. Click **Create Roll-Up**
4. On the **New Roll-Up page**, in the **Name box** enter a name for your roll-up list.
5. Select the frequency (Daily, Weekly, Monthly) you wish to be emailed your Roll-Up list.
6. Check the Groups you wish to include in your Roll-Up list.
7. Click **Create Roll-Up**



Sources

UC ANR Communications Services and Information Technology- Retrieved From: http://anrcs.ucanr.edu/isc/web/tools/ctools/

UC ANR Collaborative Tools Help- Retrieved From: https://ucanr.edu/collaborate/help.cfm

UC ANR Collaborative Tools Help Video- Retried From: https://ucanr.edu/ct/help_video/story.html

Appendix 1 - Frequently Asked Questions

Q1: What happens if we drop a MG. Do they have to be dropped one by one for each CTS group where they are active?

A1: If you remove/delete a volunteer from the VMS roster they are removed from CTS. If you simply change the status of a volunteer to inactive/resigned they still have CTS access and will have to be managed manually in CTS to remove them from the list.

Q2: Do I have to manually add new MG's to the CTS Group?

A2: When a new member is added to VMS they are automatically added to the main CTS group roster (County Master Gardeners). If there are any subsets or special CTS groups they need access to the Admin of that group can add them to the group as a member and send them an email invitation directly from CTS.

Q3: Can the statewide UC Master Gardener office add, delete, post or manage my CT group?

A3: The statewide UC Master Gardener office has no Administrative Rights to any counties on Collaborative Tools. Collaborative tools is controlled and managed at the county level.

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