Group Functions Tutorial

Groups are an easy way to share content and conversation, either privately or with the world. This tutorial walks you through the various group functions, from creation to starting a discussion within a group. For tutorials about individual resources in the Collaboratory, see each individual resource. For instructions about developing and posting a dynamic tool, see our developer tutorial.

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Getting Started

Find a Group

1. Hover your cursor over the Members tab on the main toolbar.

2. Select Groups in the drop down menu.

3. On this page, you can search for a certain group by typing in keywords or you can browse all groups on the Collaboratory website.

4. You can view the groups that you are a member of by selecting the MyCollab tab on the main toolbar.

5. Within the “My Groups” module you can view the groups that you have already joined or that you have created.

Join a Group

1. Once you are in the “Groups” page, you can search for a certain group by typing in keywords or you can browse all groups on the Collaboratory website.

2. When you have found a group that interests you, check its membership status to see whether you are eligible to join.
   - If the group is listed as Closed, you are unable to join the group.
   - If it is Restricted, click on the group name to navigate to its home page. Select Request Group Membership in the top-right corner. The group manager will determine whether you are eligible to join this group.
   - If membership is by Invite Only, you will have to wait until a manager decides to invite you to the group (or if you know someone already in the group, give them a nudge that you would like an invitation).

Note: These group privacy options exist for several reasons. For example, your group may be creating a document that will submitted for publication and thus should not be
prematurely shared, or you may be dealing with a sensitive issue, and would like a place for people to brainstorm and share ideas privately prior to the development of final products. Ideally, products (e.g., documents, tools) created on the Collaboratory should be communicated to the broader Collaboratory to inform best practices, share a case study, share data, or share a new tool.

**Leave a Group**

1. Navigate to the homepage of the group you would like to leave.
2. Select *Show Member Control* in the top-right corner of the page.
3. Select *Cancel Membership*.
4. A box will ask you if you are sure you want to leave this group. Select *OK* to cancel your membership.

**Create a New Group**

**Create a New Group**

1. Hover your cursor over the *Members* tab on the main toolbar.
2. Select *Groups* in the drop down menu.
3. Select *Create User Group* from the top-right corner of the page. This will lead you to a simple form that will help you create your own group.
4. Create a group ID. This ID needs to be alphanumeric without any spaces. This ID will be used for the group URL.
5. Include a title name for your new group. Users will see this title when they search for groups.

6. Next you have the option of including any interests that are related to your group. These interests will act as “tags” that will help users to find your group in a simple search. You can enter as many tags as you like and you should separate each tag with a comma. As you type your tag in the box, existing tags will appear in a dropdown menu. If possible, choose an existing tag in order to create consistency across the site.
7. You also have the option of including a description of your group. If you enter this description in the **public** text box, it will be visible to all Collaboratory users. If you enter this description in the **private** text box, it will be visible only to group members. Some groups choose to include both a generic description for the public to view and a more detailed description for members only.

![Public text (description - everyone will see this)](image)

**Note:** When you are providing description, you have the option to use wiki formatting. If you need help with this formatting, click on the “Wiki formatting” link at the bottom of the textboxes (or check out the **Appendix** to this tutorial). This will take you to the wiki formatting help page which provides tips and examples for how to format font styles, work with paragraphs, create heading and subheadings, create tables, make lists, and include images using wiki syntax. **Wiki formatting is completely optional** (but very useful). You can also use the (oh so helpful) formatting toolbar above the text box to format your text.

8. Decide who you want to join your group.
• If you select **Anyone**, any user who requests membership to the group will automatically be accepted

• If you select **Restricted**, users cannot join a group until you approve their request. Under this option, you can include a description of any credentials needed to join the group.

• If you select **Invite Only**, users can only gain membership through an invite sent by you or another group manager.

• If you select **Closed**, users cannot request to join your group.

9. Select **Visible** within the “Discoverability Settings” box. All group names are visible to all Collaboratory members to reduce redundancy in group creation. However, participation in each group is designated by the privacy settings you select in the previous step. Group names are automatically set to visible unless communicated via a support ticket.

10. Selecting this option means that the group will appear in searches or by browsing groups.

11. Click **Submit** to create your new group. Congratulations!

**How to Keep your Group Happy**

Want your new group to be a happy group? Here are some tips:

1. **Invite** your colleagues and anyone you know who is interested in the topic of your group. Having group members is the first step in having a successful group!

2. **Visit** the group frequently and **update** content. Groups thrive with frequent discussion and responses from other members, in chat and on discussion boards. Add new resources or post new wishes on the Wish list for group consideration. You started this group to create movement on an issue or project, so go get ‘em!

3. **Moderate**, moderate, moderate! Successful groups are kept in check by good moderation. Create a new discussion, post a blog entry, and encourage others to participate as well.

4. **Promote** group members in your group to managers. Your group is likely to be successful if you have some help managing this group. Read on to learn more about the group manager functions within the Collaboratory.

5. **Gather content** for your group. People will want to come back and engage with your group if there is interesting stuff there. Content might include data, tools, documents, videos, and tutorials.
Group Manager Functions

Invite Members
1. Navigate to the home page of a group you manage.
2. Select Show Manager Controls in the top-left corner of the page. A drop-down menu will appear.
3. Select Invite Members.
4. Type the names or email addresses of registered users, separated by commas in the “Names/Email Addresses” box. You can invite several users to join at once.
5. Write a custom message to invitees.
6. When you are finished, select Invite. Invitees will be sent a message asking if they would like to accept this invitation or not.

Edit Group
1. Navigate to the home page of a group you manage.
2. Select Show Manager Controls in the top-left corner of the page. A drop-down menu will appear.
3. Select **Edit Group**.
4. Within this page, you can edit the information you first provided when you created your group: Group description, Group Interests, and Membership Options (If you have questions about these specific functions, please see the [Create a Group Tutorial](#)).
5. When you are finished editing your group, select **Submit**.

**Customize Group**

You can customize your group by adding a group logo, photos or graphs, changing content settings, and adjusting group access settings. If you are going to be away from the page, remember to save your work. When you save you will be redirected to your group homepage. Return to the Group Customization page by following steps 1 and 2 below.

1. Navigate to the home page of a group you manage.
2. Select **Show Manager Controls** in the top-left corner of the page. A drop-down menu will appear.
3. Select **Customize Group**. You can customize your group by adding a group logo, photos or graphs, changing content settings, and adjusting group access settings.
   - **Upload a group logo**: first upload the logo using the file upload browser to the right of the page. Select **Choose File** and then select the image file you want and select **Open**. Then click **Upload**. The file name should appear in the white box above. Refresh your browser and then select your group logo in the dropdown menu. If you don’t have an official logo, you can substitute a photograph or other image file.
   - **Edit the group main content**: This is the content that appears on the main tab (overview tab) for each group. You can choose to use the default which is your group description and a selection of group members or you can also place custom content using wiki-syntax.
   - **Set group access permissions**: This feature allows you to change the access permissions for various functions of your group. Most features are set by default to be available to “Only Group Members,” but you can change them to give permissions to “Any Collaboratory Visitor,” to “Only Registered Users of the Collaboratory,” or you can “Disable” a function.

4. Select **Save Group Customization** when you are finished customizing your group.
Manage Group Pages

Through the Manage Group Pages function, you can manage any of your group’s custom content pages. Pages can contain text, images, and links to files. There is no limit to the number of custom pages you can create. The pages utilize wiki syntax that is available throughout the Collaboratory.

1. Navigate to the home page of a group you manage.
2. Select Show Manager Controls in the top-left corner of the page. A drop-down menu will appear.
3. Select Manage Group Pages.
4. Select Add a New Group Page to add a new page,

   ![Add a New Group Page]

5. Create a “Page Title.”
   
   **Note:** When you are creating content, you have the option to use wiki formatting. If you need help with this formatting, click on the “Wiki formatting” link at the bottom of the textbox. This will take you to the wiki formatting help page which provides tips and examples for how to format font styles, work with paragraphs, create heading and subheadings, create tables, make lists, and include images using wiki syntax. Wiki formatting is completely optional (but very useful). You can also use the formatting toolbar above the text box to format your text.

7. Determine Page Privacy. You can make it a “Private Page,” or set it to “Inherit the Overview Tab’s Privacy Settings.” Note that individual pages within a group can be private even though the group may have a less restrictive, overall privacy setting. This is useful when a group is working on new content that may not yet be ready for prime time.

Manage Group Modules

Through this function, you can manage any of your group’s modules (see image below). Modules are the components or content blocks that appear on your group’s homepage. Some modules are pre-built, such as the “Group Mini Calendar” or “Upcoming Events List.” You can
also create **custom modules** in which you enter custom content. Modules also support wiki syntax. To add a pre-built Group Module:

1. Navigate to the home page of a group you manage.
2. Select **Show Manager Controls** in the top-left corner of the page. A drop-down menu will appear.
3. Select **Add a New Group Module** on the right side of the page.

4. Select the module you would like to add to your group’s pages.

**Add a New Group Module**

- **Add a Group Mini Module**: Select **Group Mini Module** and then select **Add Module**.
- **Add Custom Content**: Select **Custom Content**. In the text box provided, add any content that you want to display in this module. You can also upload files or images. Select **Add Module** when you are finished.
- **Add Upcoming Events List**: Select **Upcoming Events List** and then enter how many events you want the list to display. Select **Add Module** when you are finished.

5. When you are finished, select **Add Module**.

**Delete a Group**

Managers have the ability to delete a group. You can also leave a group (unless you are the sole manager) using the process described under the [Getting Started](#) section in this tutorial.

1. Navigate to the home page of a group you manage.
2. Select **Show Manager Controls** in the top-left corner of the page. A drop-down menu will appear.
3. Select **Delete Group**.

4. You will receive a warning message informing you are about to delete a group and that group members will be notified.

5. Customize a message that will be sent to group members explaining why you have deleted this group.

6. Check the box next to “Yes, I want to destroy this group.”

7. Select **Delete** to officially delete your group.

**Remove Group Members**

Managers have the ability to remove a person from a group. It is suggested that you use this power wisely and sparingly. If a group member posts something offensive, they should be warned. If they continue their behavior, they should be removed. Once a person has been removed, they can rejoin only if the group manager accepts their request.

1. Navigate to the home page of a group you manage.

2. Select **Members** on the left sidebar.

3. Find the group member you wish to remove and select the red circle to the right of their name.

4. You can then customize a message to the member you are deleting explaining why they have been removed from the group.

5. Note that all groups must have at least one manager. If you are the last manager of the group, you will **not** be able to demote or remove yourself from the group.

**Promote Group Members to Manager**

1. Navigate to the home page of a group you manage.

2. Select **Members** on the left sidebar.

3. Find the group member you wish to promote and select the upward pointing green arrow next to their name.

4. This will promote them to a manager position. To demote them, select the downward pointing green arrow. Any group manager is able to promote or demote group members.
Using Wiki Pages

A Wiki page helps make information sharing easier for groups. You can write content for your page, upload images and documents, and set your page so that other users can contribute. Look at the example below to see how a wiki page might help your group:

Create a Wiki Page

1. Navigate to the home page of a group to which you belong.
2. Select Wiki on the left sidebar.
3. Select Create it.
4. Create a title for your wiki page.
5. In the future, there will be templates available for wiki pages. For now, ignore the “Template” box.
6. Enter any content that you want to appear on your wiki page in the text box provided.

**Note:** When you are providing this content, you have the option to use wiki formatting. If you need help with this formatting, click on the “Wiki formatting” link at the bottom of the textbox (or check out the Appendix to this tutorial). This will take you to the wiki formatting help page which provides tips and examples for how to format font styles, work with paragraphs, create heading and subheadings, create tables, make lists, and include images using wiki syntax. **Wiki formatting is completely optional** (but very useful). You can also use the formatting toolbar above the text box to format your text.
7. Decide how you want to “Treat” your wiki page. You can set it as a “Wiki page anyone can edit” or as a “Knowledge article with specific authors.”

8. Enter the authors of this wiki page. You can also decide to hide the author list by checking the box below.

9. Check any of the other boxes that you want to for your group. These boxes will determine what users can do on your wiki page.

10. Enter any tags for your wiki page.

11. If you are just editing your wiki page, you can write a summary of the changes that you made. Otherwise, ignore this text box.

**Edit your Wiki Page**

1. Navigate to the home page of a group to which you belong.

2. Select Wiki on the left sidebar.

3. Select Edit.

4. From this page, you can edit any of the original information your created for your wiki page.

5. In the last text box (titled “Edit Summary”), write a brief summary of the changes you made on the wiki page. This summary will appear in the “history” of your wiki page.

6. Select Submit when you are finished.

**Populating your resources page**

Upload resources that will help inform your group and support the work you are doing. Types of resources you can upload include: case studies, educational and community resources, government studies and reports, laws, regulations & plans, publications, tools and working documents. If you feel your contribution does not fit into any of our predefined types, please contact us with details of what you wish to contribute, including a description and file types how you believe it should be categorized.

**Note on Uploading Resources:** You can upload resources that you own the rights to or that are designated as open access materials. If you would like to share a resource that does not meet these requirements, feel free to copy the citation, abstract and/or link. Just be aware that users may be frustrated when they cannot access the non-open access resources that you post. Please review our Site Terms and Conditions page before uploading any resources to the Collaboratory.
Upload a Case Study

Case studies describe how an agency, community or individual worked through the climate adaptation process. Case studies may also relay one component of the adaptation process (e.g., vulnerability/risk assessment).

1. Navigate to the home page of a group to which you belong.
2. Select Resources on the left sidebar.
3. Select Start a New Contribution on the right side of the page.
4. Select Case Studies on the left side of the page.
5. Create a title for the case study.
6. Select Searching Resource to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the case study. The abstract is typically a one or two paragraph description and will be visible to all users.
8. In the details box, you have the option of describing the case study further by adding the target, location, leader and web address of the case study.
9. Click Next to navigate to the next step.
10. Select Choose File to upload a document. Remember that you can only upload documents that you own the rights to or that are designated as open access materials.
11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select Open.
12. The file may automatically upload, but if not, select Upload.
13. Select Next when you have finished uploading your documents.
14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click Select Group to choose a group.
15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - Private = anyone may view/download the resources.
   - Protected = abstract is visible, files restricted to group members.
   - Private = only visible to group members.
16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select **Next**.

17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select **Add**.

18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select **Add**.

19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select **Add**.

20. Under “Assigned Tags,” type in any tags that are related to your case study. If you would like to search existing tags, select **Find Existing Tags** on the right side of the page. Select **Next** when you are finished.

21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to **Site Terms and Conditions**.

22. To complete this process, select **Submit Contribution**. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.

**Upload Education and Community Resources**

Educational materials are typically designed for the general public, and may include resources suitable for classrooms and our community-level outreach on particular climate-related issues.

1. Navigate to the home page of a group to which you belong.
2. Select **Resources** on the left sidebar.
3. Select **Start a New Contribution** on the right side of the page.
4. Select **Education and Community** on the left side of the page.
5. Create a title for the resource you are uploading. This title will be visible to other users in resource search results for all contributions.
6. Select **Searching Resource** to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the resource. The abstract is typically a one or two paragraph description and will be visible to other users.
8. In the details box, you have the option of describing the resource further by adding the target, location, leader and web address of the case study.

9. Click Next to navigate to the next step.

10. Select Choose File to upload a document. Remember that you can only upload documents that you own the rights to or that are designated as open access materials.

11. A documents tab will pop up and within this box you can search your computer for any educational material that you want to upload. When you find the document you want, click on it and then select Open.

12. The file may automatically upload, but if not, select Upload.

13. Select Next when you have finished uploading your document.

14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click Select Group to choose a group.

15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - Private = anyone may view/download the resources.
   - Protected = abstract is visible, files restricted to group members.
   - Private = only visible to group members.

16. In the box labeled “Authors” you can select the authors of your resource. When you have finished adding authors, select Next.

17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select Add.

18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select Add.

19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select Add.

20. Under “Assigned Tags,” type in any tags that you would like to associate with your resource. If you would like to search existing tags, select Find Existing Tags on the right side of the page. When you are finished adding tags, select Next.

21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.
22. To complete this process, select Submit Contribution. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.

Upload Government Studies and Reports

Government studies and reports are documents that provide research data, policy analysis and policy guidance for climate change impacts, and adaptation strategies. These resources include documents prepared or commissioned by international, federal, state, local, and municipal governments that often support or enhance legal initiatives for natural resource management and climate change adaptation. As with many other types of documents, users often upload links to these documents, rather than pdfs of the actual report.

1. Navigate to the home page of a group to which you belong.
2. Select Resources on the left sidebar.
3. Select Start a New Contribution on the right side of the page.
4. Select Government Studies and Reports on the left side of the page.
5. Create a title for the resource you are uploading. This title will be visible to other users in resource search results for all contributions.
6. Select Searching Resource to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the resource. The abstract is typically a one or two paragraph description and will be visible to other users.
8. In the details box, you have the option of describing the resource further by adding the target, location, leader and web address of the case study.
9. Click Next to navigate to the next step.
10. Select Choose File to upload a document. Remember that you can only upload documents that you own the rights to or that are designated as open access materials.
11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select Open.
12. The file may automatically upload, but if not, select Upload.
13. Select **Next** when you have finished uploading your document.
14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click **Select Group** to choose a group.
15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - **Private** = anyone may view/download the resources.
   - **Protected** = abstract is visible, files restricted to group members.
   - **Private** = only visible to group members.
16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select **Next**.
17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select **Add**.
18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select **Add**.
19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select **Add**.
20. Under “Assigned Tags,” type in any tags that you would like to associate with your resource. If you would like to search existing tags, select **Find Existing Tags** on the right side of the page. When you are finished adding tags, select **Next**.
21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.
22. To complete this process, select **Submit Contribution**. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.

**Upload Laws, Regulations & Plans**

Laws, Regulations and Plans are legal materials on climate change and adaptation strategies. This database includes international, federal, state, local, and municipal statutory, regulatory and judicial legal authorities pertaining to natural resource management and climate change adaptation.

1. Navigate to the home page of a group to which you belong.
2. Select **Resources** on the left sidebar.
3. Select **Start a New Contribution** on the right side of the page.
4. Select **Laws, Regulations & Plans** on the left side of the page.
5. Create a title for the resource you are uploading. This title will be visible to other users in resource search results for all contributions.
6. Select **Searching Resource** to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the resource. The abstract is typically a one or two paragraph description and will be visible to other users.
8. In the details box, you have the option of describing the resource further by adding the target, location, leader and web address of the resource.
9. Click **Next** to navigate to the next step.
10. Select **Choose File** to upload a document. **Remember that you can only upload documents that you own the rights to or that are designated as open access materials.**
11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select **Open**.
12. The file may automatically upload, but if not, select **Upload**.
13. Select **Next** when you have finished uploading your documents.
14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click **Select Group** to choose a group.
15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - **Private** = anyone may view/download the resources.
   - **Protected** = abstract is visible, files restricted to group members.
   - **Private** = only visible to group members.
16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select **Next**.
17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select **Add**.
18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select **Add**.
19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select Add.

20. Under “Assigned Tags,” type in any tags that you would like to associate with your resource. If you would like to search existing tags, select Find Existing Tags on the right side of the page. When you are finished adding tags, select Next.

21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.

22. To complete this process, select Submit Contribution. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.

Share Websites, Online Communities and Web-based Tools.
This resource category contains short descriptions and links to online resources other than Case Studies, Educational Material, Government Studies & Reports, or Laws, Regulations & Plans, relevant to climate change adaptation. These may include websites, online communities or web-based tools.

1. Navigate to the home page of a group to which you belong.
2. Select Resources on the left sidebar.
3. Select Start a New Contribution on the right side of the page.
4. Select Other Online Resources on the left side of the page.
5. Create a title for the resource.
6. Select Searching Resource to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the resource. The abstract is typically a one or two paragraph description and will be visible to other users.
8. In the details box, type in the web address for this online resource. This is a required step for uploading online resources.
9. Click Next to navigate to the next step.
10. Select Choose File to upload a document. Remember that you can only upload documents that you own the rights to or that are designated as open access materials.

11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select Open.

12. The file may automatically upload, but if not, select Upload.

13. Select Next when you have finished uploading your documents.

14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click Select Group to choose a group.

15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - Private = anyone may view/download the resources.
   - Protected = abstract is visible, files restricted to group members.
   - Private = only visible to group members.

16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select Next.

17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select Add.

18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select Add.

19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select Add.

20. Under “Assigned Tags,” type in any tags that you would like to associate with your resource. If you would like to search existing tags, select Find Existing Tags on the right side of the page. When you are finished adding tags, select Next.

21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.

22. To complete this process, select Submit Contribution. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.
Upload Publications

You can share publications that you own the rights to or that are designated as open access materials. The topic of the publication should be relevant to climate change adaptation.

1. Navigate to the home page of a group to which you belong.
2. Select Resources on the left sidebar.
3. Select Start a New Contribution on the right side of the page.
4. Select Publications on the left side of the page.
5. Create a title for the publication.
6. Select Searching Resource to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.
7. Write an abstract for the publication. The abstract is typically a one or two paragraph description and will be visible to other users.
8. In the details box, you have the option of describing the case study further by adding the target, location, leader and web address of the case study. If you are unable to upload the document because it is copyrighted, be sure to post the web address.
9. Click Next to navigate to the next step.
10. Select Choose File to upload a document. Remember that you can only upload documents that you own the rights to or that are designated as open access materials.
11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select Open.
12. The file may automatically upload, but if not, select Upload.
13. Select Next when you have finished uploading your documents.
14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click Select Group to choose a group.
15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - Private = anyone may view/download the resources.
   - Protected = abstract is visible, files restricted to group members.
   - Private = only visible to group members.
16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select Next.

17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select Add.

18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select Add.

19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select Add.

20. Under “Assigned Tags,” type in any tags that you would like to associate with your case study. If you would like to search existing tags, select Find Existing Tags on the right side of the page. When you are finished adding tags, select Next.

21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.

22. To complete this process, select Submit Contribution. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What’s New” listing.

Upload Tools
Tools are resources developed by agencies, universities, nonprofits or individuals that help with individual steps or the overall process of climate change adaptation.

1. Navigate to the home page of a group to which you belong.
2. Select Resources on the left sidebar.
3. Select Start a New Contribution on the right side of the page.
5. Select Tools on the left side of the page.
6. Create a short tool name. This name will be used for the directory containing the tool. The tool name should be unique and contain 3-15 alphanumeric characters, no spaces. Once you register your tool, you cannot change its name, so be careful to pick a good one.
7. Create a title for this tool.
8. Write a one-line description of your tool.
9. Specify a screen size for your application in pixels
10. Determine the access level for this tool. Tool access controls who is allowed to run your tool once it is published. This is particularly useful for applications that have code with export restrictions, such as cryptography algorithms. Generally, “Anyone can run tool” is the best option.

11. **Determine the source code access level for this tool.** You can choose to make your source code open or closed to the public. Open source tools have clear license that allows others to download your code and build upon your work. Closed source tools are kept private to your development team; others will be able to run the tool but they won’t have access to the code. You can change this option at any point in the development process. When you approve your tool to make it available to others, you’ll have a chance to revisit this option. If you’re not sure what to choose at this point, pick “closed source.”

12. **Determine the project area access level for this tool.** Project Area Access controls who can view the tool development area for this project. The tool development area includes a wiki, which can be used to post tool-related information. Some teams use the wiki as a place to post tutorials, examples, and other information about the tool. Opening this to the public means that all users can see the information (though they won’t be able to edit it). Other teams choose to keep this area private so that they can post to-do lists and research results without making that information public.

13. Create a login in so that other people on your development team are allowed to modify your code.

14. Select **Register Tool.**

**Upload Working Documents**

Many groups need a function to share and edit evolving drafts of a document. The Collaboratory allows you to upload a working document and ask for editing suggestions from other group members in the wiki or group discussion pages. Once another member edits the document, they may upload the new version for others to comment on.

1. Navigate to the home page of a group to which you belong.
2. Select **Resources** on the left sidebar.
3. Select **Start a New Contribution** on the right side of the page.
4. Select **Working Document** on the left side of the page.
5. Create a title for the working document.
6. Select **Searching Resource** to search for this title among resources that have already been uploaded. A new page will pop up and you can search for your title within the “Find a Resource” box. This step ensures that there are no duplicates of shared resources.

7. Write an abstract for the document. The abstract is typically a one or two paragraph description and will be visible to other users.

8. In the details box, you have the option of describing the credits, sponsor and references for the working document.

9. Click **Next** to navigate to the next step.

10. Select **Choose File** to upload the document.

11. A documents tab will pop up and within this box you can search your computer for any document that you want to upload. When you find the document you want, click on it and then select **Open**.

12. The file may automatically upload, but if not, select **Upload**.

13. Select **Next** when you have finished uploading your documents.

14. In the “Group Ownership” box, you have the option to associate your resource to a group. Click **Select Group** to choose a group.

15. In the “Group Ownership” box, you can also control the level of access that users will have to your resource. Under the Access tab, select either public, protected or private:
   - **Private** = anyone may view/download the resources.
   - **Protected** = abstract is visible, files restricted to group members.
   - **Private** = only visible to group members.

16. In the box labeled “Authors” you can select the authors of your document. When you have finished adding authors, select **Next**.

17. Under Collaboratory Authors, you can search for authors who are a part of the Collaboratory. To add another Collaboratory author, select **Add**.

18. Under Non-Collaboratory authors, type in the name of the author you would like to include. To add another Non-Collaboratory author, select **Add**.

19. Under Institutions, type in the name of the institution you would like to include. To add another Institution, select **Add**.

20. Under “Assigned Tags,” type in any tags that you would like to associate with your document. If you would like to search existing tags, select **Find Existing Tags** on the right side of the page. When you are finished adding tags, select **Next**.
21. Review the document you have uploaded and the information that you have provided. When you are ready, check the box under “Authorization.” Checking this box means that you agree to Site Terms and Conditions.

22. To complete this process, select Submit Contribution. After you submit, your submission will be reviewed. If it is accepted, the submission will be given a “live” status and will appear in our resources at the top of the Collaboratory’s “What's New” listing.

**Messages**

The Messaging feature is a helpful way to share information between all group members, all group managers or a specific group member. Once a message is sent through the Collaboratory, the recipients’ designated email address (see Member Profile settings) receives a notice that they have received a Collaboratory message. The message also appears in the email notification, but must be answered within the Collaboratory.

**View a Message**

1. Navigate to the home page of a group you manage.
2. Select Messages on the left sidebar.
3. Select Sent Messages to view the messages that you have sent.

**Send a Message**

1. Navigate to the home page of a group you manage.
2. Select Messages on the left sidebar.
3. Select Send New Message from the menu toolbar.
4. Type in the recipients you to which you are sending the message. You can send your message to all group members, all group managers, or a specific group member.
5. Write a subject for your message.
6. Write your message.
7. Select Send.

**Discussion**

Group Discussions are helpful in the same way that conference calls are; they allow input from everyone on the topics germane to the group – everything from discussion on a model output
or dataset to priorities for the group or notifications of a recent announcement/meeting/report. See the image below for an example of a great discussion:

**Start a Discussion**

1. Navigate to the home page of a group you manage.
2. Select **Discussion** on the left sidebar.
3. Select **Add Discussion**.
4. Choose a category for your discussion.
5. Create a title for your discussion. Choose a catchy and specific title so that users will be more likely to comment!
6. Write the content to start your discussion. Include a question or two so that users will reply to your discussion. See the example above for an example of a great discussion.
7. Include any tags related to your discussion. These tags will help users to find your group in a simple search. As you type your tag in the box, existing tags will appear in a
dropdown menu. If possible, choose an existing tag in order to create consistency across the site.
7. Attach any files related to your discussion.
8. Include a description of your discussion.
9. Select Submit.

Blog

Blogs are a helpful way to provide commentary on a subject related to climate change adaptation. While discussions usually involve two or more users, blogs are written by one user. However, users can respond to your blog by posting comments. Use your blog post to update group members on a particular issue or to provide a summary from a meeting on climate change.

Post a New Blog Entry
1. Navigate to the home page of a group you manage.
2. Select Blog on the left sidebar.
3. Select New Entry in the top-right corner.
4. Create a “Title” for your new blog entry.
5. Enter your content in the “Entry” textbox. Wiki formatting is allowed.
6. Enter tags separated by commas to connect your blog entry to other information on the Collaboratory.
7. Choose whether you want to allow comments by checking the box next to Allow comments.
8. Select the “Privacy Controls” for your group.
9. Select Save to post your blog.

Change Blog Settings
1. Navigate to the home page of a group you manage.
2. Select Blog on the left sidebar.
3. Select Settings in the right-hand corner.
4. Decide who can post to this blog. By default, both group managers and standard group members can post blog entries.
5. Decide whether to enable or disable the RSS feed of entries.
6. Determine the whether RSS feeds will show the full or partial blog entry.
7. When you are finished changing the blog settings, select Save.

Wish List
Wish lists make it possible for group members to suggest and vote on any important issues or ideas they would like the group to focus on next. The Wish List can be used to take a quick poll, build consensus, or prioritize next steps.

Access Wish List
1. Navigate to the home page of a group you manage.
2. Select Wish List on the left sidebar.
3. Here you can view the Prioritized List of Pending Requests. Users click on each title in the list to see more details, and then have the option to give thumbs up or down on the idea.

Create a wish.
1. Select Add a New Wish in the right hand corner.

2. If you would like to post anonymously, check the Post anonymously box. Otherwise, leave this unchecked.
3. Under Summary of your wish, write a brief description of the wish.
4. In the box below, you are able to explain this wish in more detail.
5. Add any tags that are related to your wish.
6. Select **Submit**.
7. View the example wish below:

**Wish List Functions**

1. Within a wish list, a member can vote “up” or “down” for a wish.

2. Members can also vote for the importance of the wish (on a scale of 0 to 5) and can vote for the amount of effort that should be focused on this wish.
3. Members also are able to add comments to the wish list.

**Calendar**

The calendar function allows any group member to view and add events that are related to a particular group. **These events are separate from events posted on the main Collaboratory calendar.** If you want your event to be visible to all Collaboratory members, add your event to the main calendar located on the Collaboratory homepage.

**Add an Event**

1. Navigate to the home page of a group you manage.
2. Select **Calendar** on the left sidebar.
3. Select **Add Event** in the right corner of the page.
4. Add an “Event Title.”
5. Include “Event Details” explaining the subject of the event
6. Include “Event Start” and “Event End” times.
7. Select **Submit Event.** Your event will now appear on group calendar.

**Remove an Event**

1. Navigate to the home page of a group you manage.
2. Select Calendar on the left sidebar.
3. Select the event you would like to delete.
4. Select **Delete** to delete the event.

**Edit an Event**

1. Navigate to the home page of a group you manage.
2. Select Calendar on the left sidebar.
3. Select the event you would like to edit.
4. Select **Edit** to change the name, details, date or time of the event.
Need More Help?

Submit a Support Ticket

1. Hover your cursor over the Support tab on the main toolbar.
2. Select Tickets.
3. In the top-right corner, select New Ticket.
4. Enter your User Information including your username, name, organization and email.
5. Enter the name of your Operating System and Browser.
6. Describe “Your Problem.” Provide as much information as possible.
7. Add a screenshot if you think it will help us diagnose your problem.
8. Select Submit.

Ask a Question

1. Scroll to the bottom of whatever Collaboratory page you are on.
2. Select Ask a Question under “Get Involved.”
3. In the top-right corner, select New Question.
4. Check the first box if you would like to post a question anonymously.
5. Enter any tags that are related to your question. As you type your tag in the box, existing tags will appear in a dropdown menu. If possible, choose an existing tag in order to create consistency across the site.
6. Enter your short question. This is required and it should be one line.
7. Enter your long question. Here you should provide the details of your question.
8. Select Submit.

Appendix

Wiki Formatting Cheatsheet

This page demonstrates commonly used formatting syntax for editing within your group pages – this list is drawn from the more comprehensive guidance that is available when you click on the Wiki Formatting link when you are in edit mode. Note, one of the best ways to learn is to click on “Edit” when you are viewing a page that is similar to one you would like to create – for example, it has text, a few headings, links, and pictures – then you can see the formatting
and cut, paste, and modify. Also, any document that you want to allow others to download from the page, or image that you want to display on the page, needs to first be uploaded – there is a place to do that on the right of the screen. If your document or image does not appear in the box, you will get a missing file error message when you try to link to it.

A simple example of setting up a front page for a group is included at the end of this Appendix.

**Font Styles**
The wiki pages support the following font styles – you can type the symbols in directly, or choose the font style from the icons.

Example:

```markdown
* '''bold''', '''!''' can be bold too''', and '''! !'''
* ''italic''
* ''''bold italic''''
* ___underline___
* ^superscript^  
* ,,subscript,,
```

Display:

- **bold**, ! can be bold too, **and** !
- *italic*
- *bold italic*
- underline
- ^superscript^
- ,,subscript,,

**Headings**
You can create heading by starting a line with one up to five equal sign characters (=) followed by a single space and the headline text. The line should end with a space followed by the same number of = characters. You can also select the text that you want to be a heading, and then click on the H2 (second level heading) icon to generate a second level heading.

Example:

```
= Heading =
```
**Heading**

**Subheading (aka second level heading)**

*About this*

**Paragraphs**

A new text paragraph is created whenever two blocks of text are separated by one or more empty lines. A forced line break can also be inserted, using:

```
Line 1
[BR]Line 2
```

Display:

```
Line 1
Line 2
```

**Lists**

The wiki supports both ordered/numbered and unordered lists.

Example:

* Item 1
  * Item 1.1
  * Item 2

# Item 1
  # Item 1.a
  # Item 1.b
    # Item 1.b.i
    # Item 1.b.ii
  # Item 2

Display:

- Item 1
- Item 1.1
  - Item 2

1. Item 1
   1. Item 1.a
   2. Item 1.b
      1. Item 1.b.i
      2. Item 1.b.ii

2. Item 2

**Note:** there must be one or more spaces preceding the list item markers, otherwise the list will be treated as a normal paragraph.

**Definition Lists**

The wiki also supports definition lists, or other lists where you would like the second line indented.

Example:

```
llama::
  some kind of mammal, with hair
ppython::
  some kind of reptile, without hair
  (can you spot the typo?)
```

Display:

```
llama
  some kind of mammal, with hair
ppython
  some kind of reptile, without hair (can you spot the typo?)
```

**Tables**

Simple tables can be created like this:

```
<table>
<thead>
<tr>
<th>Cell 1</th>
<th>Cell 2</th>
<th>Cell 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell 4</td>
<td>Cell 5</td>
<td>Cell 6</td>
</tr>
</tbody>
</table>
```

Display:

```
Cell 1 Cell 2 Cell 3
Cell 4 Cell 5 Cell 6
```
**Links**

Hyperlinks are automatically created for `WikiPageNames` and URLs when you enter them in the proper format. You can get the brackets to pop up for you if you click on the link icon in the set of editing icons (looks like a chain).

Example:

* [http://www.edgewall.com/ Edgewall Software]
* [MainPage Main Page]

Display:

- Edgewall Software
- Main Page

**Images**

The simplest way to include an image is to upload it as attachment to the current page, and put the filename in like this: `[[Image(picture.gif)]]`.

In addition to the current page, it is possible to refer to other resources:

- `[[Image(picture.gif)]]` (simplest)
- `[[Image(picture.gif, 120px)]]` (give it a specific width)
- `[[Image(picture.gif, right)]]` (align by keyword)
- `[[Image(picture.gif, align=right)]]` (align by attribute)

See [Wiki Macros](#) for further documentation on the `[[Image()]]` macro.

**Macros**

Macros are custom functions to insert dynamic content in a page.

Example:

`[[Timestamp]]`
Simple example: Content from an “About the Group” page as it looks in the wiki (note you can only edit the “About the Group” page if you are one of the managers of the group). A screen capture showing how this looks to group members is below.

This working group was created to promote collaboration among those interested in climate change adaptation that reduces risks to people and nature within the Chicago Region. The group began as a place to coordinate work on an initial set of guidance called "Advancing Adaptation in the City of Chicago: Climate Considerations for Management of Natural Areas and Green Spaces," an effort that represented collaboration between City of Chicago officials responsible for natural areas and greenspaces, and scientists at the Field Museum, The Nature Conservancy, and the University of Notre Dame. Over 20 "Climate Fellows" that manage or conduct research on natural resources in the Chicago Region helped us frame and develop the guidance. The goal of this group is to help keep this guidance up to date, and to facilitate adaptation decision making within the City. For more information, contact Abigail Derby Lewis at aderby@fieldmuseum.org.

The report can be accessed [https://adapt.nd.edu/resources/1019 'here'], and is also available from this group's [https://adapt.nd.edu/groups/chicagochecklist/resources ''Resources''] page.

[[Image(climate_considerations_doc.jpg)]]

Please visit the [https://adapt.nd.edu/groups/chicagochecklist/forum ''Discussion''] page if you:

- Have feedback on the guide.
- Are interested in sharing observations of climate impacts.
- Have an example to share of how your organization has adapted.
- Or would like to start your own discussion!
Also, check out the [https://adapt.nd.edu/groups/chicagochecklist/wishlist ''Wish List''] page to see what others are looking for!