ISDS Business Process Document: Group Administrators

VERSION 5 | UPDATED 15 SEPTEMBER 2017

INTERNATIONAL SOCIETY FOR DISEASE SURVEILLANCE
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Version Remarks

The fourth version of the ISDS Business Process Document for Group Administrators includes revisions to Group Admin processes that have been modified or clarified since the document's last release in April 2017. These include clarifications about the process for starting a group, setting up forums versus forum threads, calendar events, and links to files or external pages. The latest version of the business process document also includes information about the changes made to the website with the integration of the Social Link application. Screenshots below have been updated to reflect the new look formatting caused by the Social Link enhancement. More detailed explanations and demonstrations can be found in the ISDS webinar recording from August 10 on "ISDS Website Enhancements: Improving Your User Experience."

Overview

The international Society for Disease Surveillance (ISDS) released a new website (www.healthsurveillance.org) early 2017 to reorganize and revitalize web activity for its community members. The new website has numerous enhanced features, including the ability to give community members direct control over content on a group page. These members are designated as Group Administrators (Group Admins) on the backend of the new website, and they are able to modify descriptions, content, activities and page formats on their assigned group pages. This manual serves as a guidance document for Group Administrators to help these individuals navigate through their controls and seamlessly transition to their roles as overseers of their respective groups.

Group Administrator Roles & Responsibilities

The Group Administrator (Group Admin) is a volunteer Point of Contact for a group whose essential role is manage the group's activity on the front-end of the new ISDS website. The ISDS Community of Practice relies on the vitality of its groups for generating discussions, disseminating information, and promoting information to advance its mission of enabling communications between surveillance practitioners and researchers. The Group Admin is thus charged with ensuring the integrity of ISDS' values and activities. Responsibilities include and are not restricted to:

- Overseeing or directly updating the group's content on the website, including its homepage and description, libraries and custom pages;
- Managing group membership, including approving pending members or inviting contacts;
- Fostering activity on the group page by starting and engaging in forum discussions or blog postings;
- Frequently updating the group's calendar as needed;
- Reviewing the resources and tools produced by the group for inclusion in the Surveillance Knowledge Repository every 6 months; and,
- Reporting to ISDS staff occasionally about suggestions for site improvements, feature enhancements, and member engagement; also reporting qualitative information about member activity on the group page.

The role of the Group Admin may expand beyond the functions listed above as the ISDS website continues its development and ISDS membership grows.

Getting Started

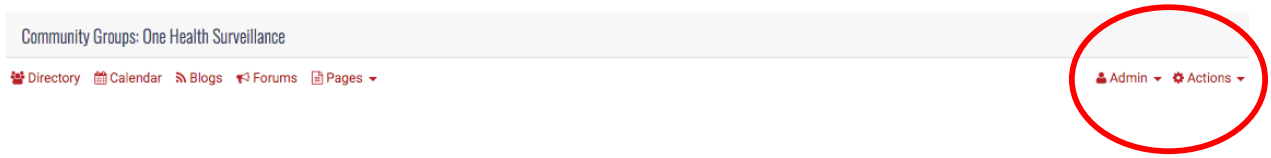
An ISDS staff member will assign you as a Group Admin for a group from the backend of the ISDS website. Your name should appear under a Group Admin designation on the appropriate group page. If you do not see your name listed on the group homepage, please contact a staff member listed at the end of this document. ***Note: you will still need to join or request membership to the group.*** Catherine Tong or Emilie Lamb from ISDS will approve your request, and you should be able to access all features of the group page afterward.

The first thing we recommend you do as a Group Admin is to update the homepage content. More detailed instructions of how to add a group description and welcome text are provided under Content Management: Homepage Options.

Once your group description and welcome text has been updated, direct people to the group page and ask them to join! Get your members engaged by posting in the forum space or starting a blog. Use the instructions in the next section to unlock your group's site potential.

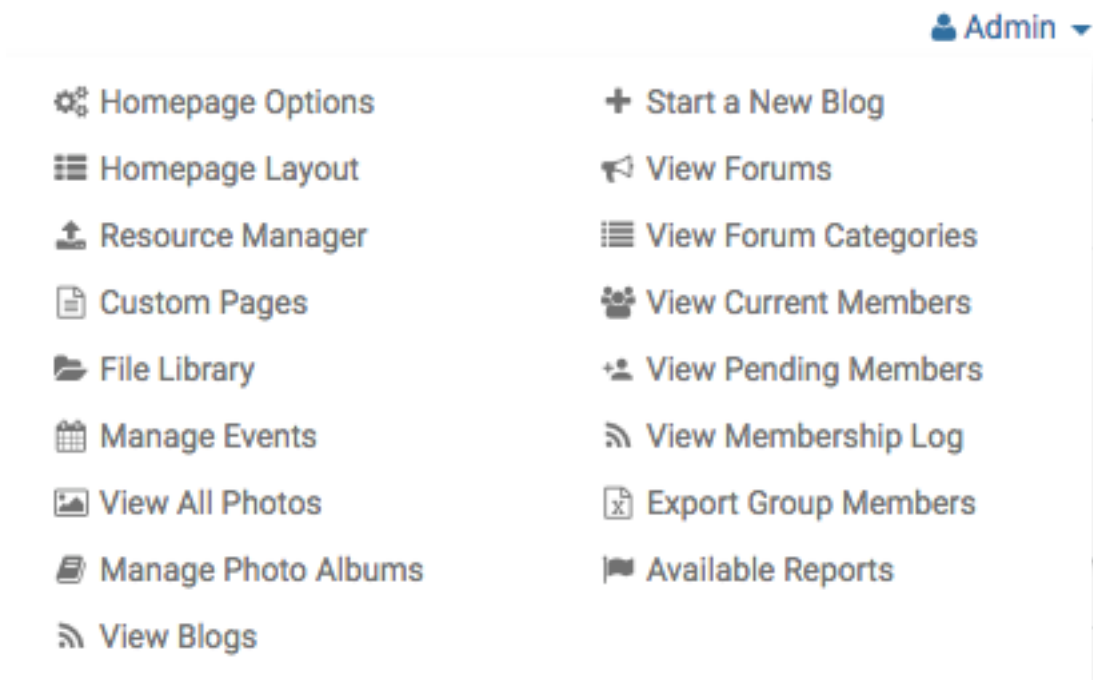
Group Administrator Controls & Features

As soon as an ISDS staff member designates you as a Group Admin from the backend of the ISDS website, you will see an additional icon on the group page that you are made administrator for. An additional "Admin" dropdown menu should appear next to the one labeled "Actions" on the far-right corner of the group page. The following section will outline all relevant controls provided by the additional options.



Admin Options

The "Admin" menu is the central control for Group Administrators. Here, admins can manage group pages, a group calendar, a group Photo Gallery, its blog space and forums. Admins can also view current and approve pending members, as well as communicate with the group, using this control panel.



Content Management

Homepage Options

This is where you would typically start to populate your group's homepage. There are four sections to this page:

1) Group Short Description
2) Group Feature Menu Options
3) Use Standard Homepage
4) Group Homepage Welcome Text

Make sure to fill out a short description for the group as this is what appears on the Group List search results page.

Under "Group Feature Menu Options," you can select what features are available for members to access on the group page. Unchecking a feature will disable the feature temporarily until re-checked. **Please select the "Group Directory," "Group Calendar," and "Group Forums" at a minimum.**

Under "Use Standard Homepage," you can choose whether to use your default welcome message as the group's homepage or to use a custom group page.

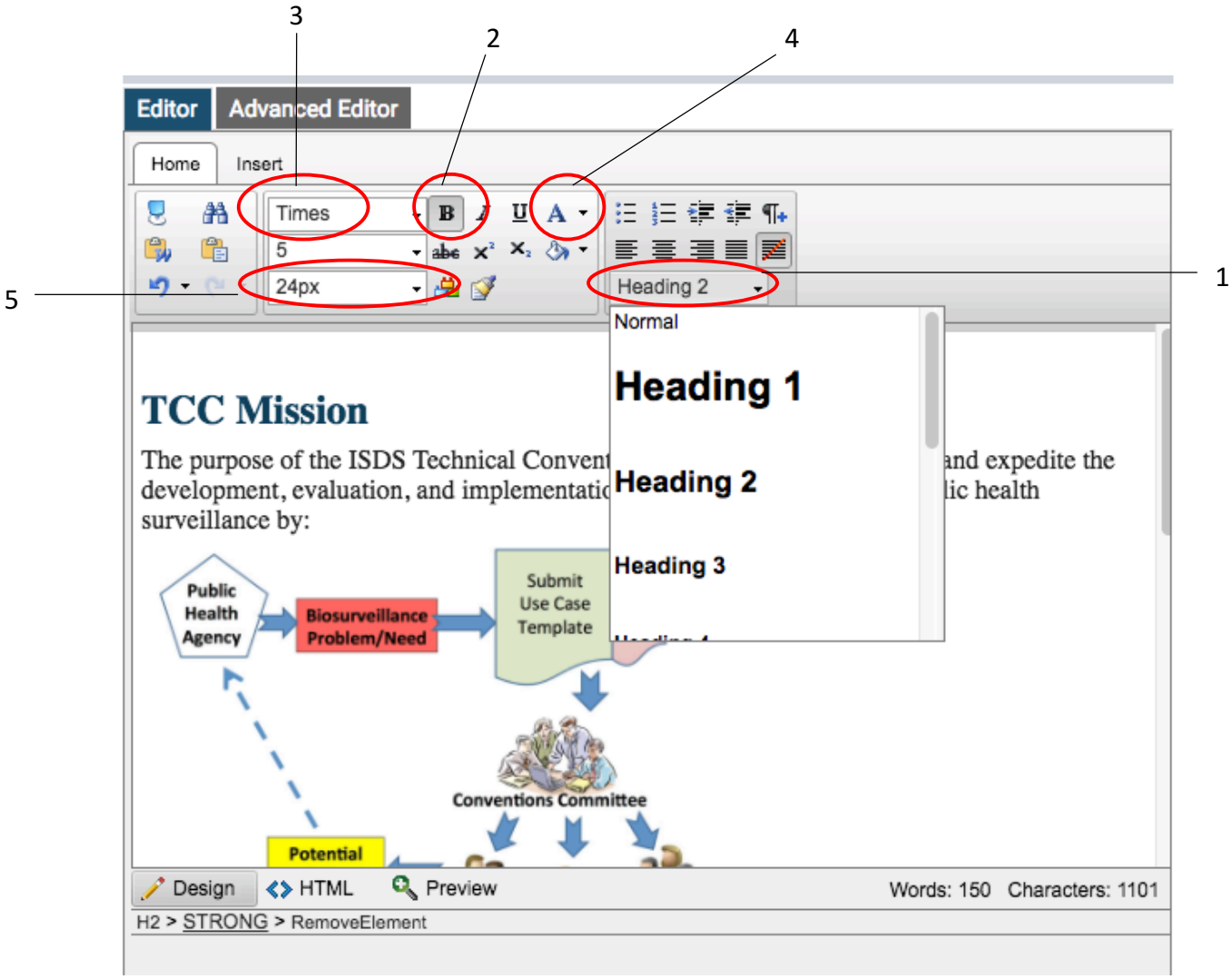
The "Group Homepage Welcome Text" section is where you add content to your group's homepage. Use the Editor (or Advanced Editor) to populate a group description. You may also upload files to your homepage by selecting files housed in the group's Resource Manager, if the file is not available on the internet.

Style & Formatting: (please follow!)

- **Information to be sure to have:**
  - **Group description, including mission and outline of activities**
  - **Group leadership information**
- Provide a heading
  - Heading 2 setting[1] for the largest
  - Bold font[2]
  - Ignore font designation[3]
  - Font color[4]: #205372
  - 24px[5]
- Provide a group description

- Normal font setting[1]
- Ignore font designation[3]
- 16px[5]
- Font color[4] black, unless pointing attention to specific text (use best judgment)
  - Dark purple: #4F1166
  - Green: #B1D068
  - Light Green: #D5E6AB
  - Light Blue: #D3E8F0

- Add pictures, if appropriate! (ex. Analytic Solutions Committee)
- Add the General Information disclaimer at the bottom, as specified under Getting Started



Note, you can also choose to use a Custom Page as a Homepage by selecting the appropriate tab under the "Group Feature Menu Options" section.

Homepage Layout

"Homepage Layout" allows you to customize the look and feel of the group homepage. You can select a template, select the features to include on the homepage and rearrange the content zones to suit the group's needs. All members of a group should have access to five activities on a Group page, unless restricted under "Homepage Options." These include: a Group Directory, a Calendar, Blogs, Forums, and a Photo Gallery.

For consistency, please select the "Right Column" template.

To avoid clutter on the homepage, deselect the features under "Choose your features:" that you feel are not necessary to your group's engagement activities. For instance, you would not need to necessarily see a section on "Recently Updated Profiles" or "Photo Gallery." However, **please make sure that "Group Reps," "Group Navigation" and "Welcome Message" are *always* checked!**

File Management

ISDS has provided multiple options for storing and sharing files and resources among community/group members.

The Surveillance Knowledge Repository (KR) is an online database for sharing resources that are relevant to the entire surveillance community across multiple disciplines (syndromic surveillance, One Health, etc.) and should include resources, i.e. articles, presentations, webinars, etc. that can be viewed individually to share knowledge on research, data analysis processes, best practices, and a variety of other areas of interest. **The KR is not for sharing working documents, group meeting notes, meeting recordings, and other group resources that are only relevant to that group at that time. Once the resource is finalized by the group, then it can be shared via the KR with the broader community.**

The Group Pages on Healthsurveillance.org are a virtual shared spaces for groups to collaborate on specific projects and to share specific group resources, like meeting recordings, meeting notes, documents that are currently being developed by the groups. These pages also have the added functionality of supporting a group calendar, group forums, the ability to message other group members and to allow control over access to the group resources via the permissions feature. Group admins can also created Custom Pages to share File Libraries, key group content, and link to other resources (like the KR and the ISDS GitHub Repositories).

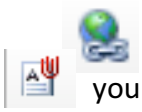
The ISDS GitHub Organization on GitHub is meant to be a code sharing library for the CoP to utilize to store and share code among various projects. Only code files (and their associated documentation files) should be stored in the repository and can be linked to from either the KR or the Group Pages on healthsurveillance.org.

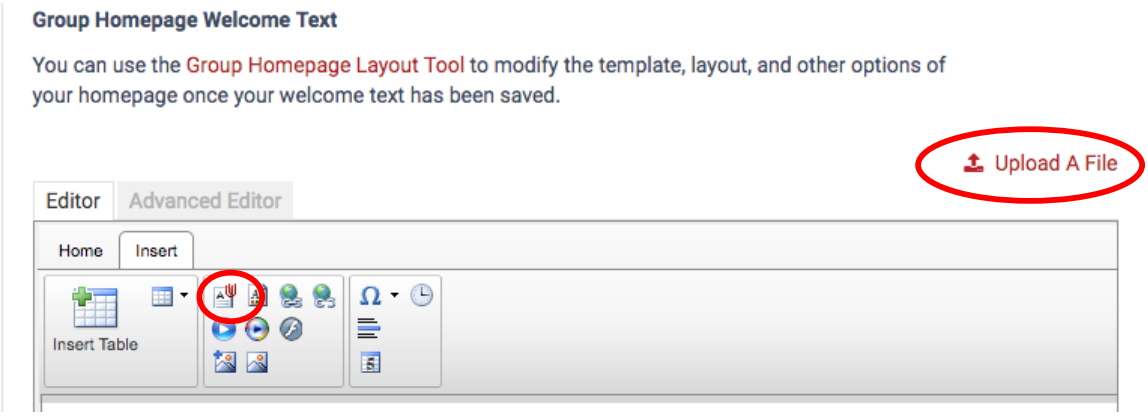
Here are some examples of where to store various resources:

- Data Quality Committee Meeting recording and associated notes/reports/slides – Data Quality Committee Group pages on Healthsurveillance.org
- Group activity updates - Group pages on Healthsurveillance.org
- Urgent Care Workgroup paper draft – Urgent Care Workgroup Group page on Healthsurveillance.org
- R Group Presentation on using R to generate Reports with associated R code files
- the presentation recording and any presentation slides – Knowledge Repository (with a link to the KR resource page posted on the R Group's Group page on healthsurveillance.org)
- R code files – ISDS GitHub Organization (with a link to repository posted on the R Group's Group page on healthsurveillance.org)
- Live code for the Metadata Visualization Application – ISDS GitHub Organization

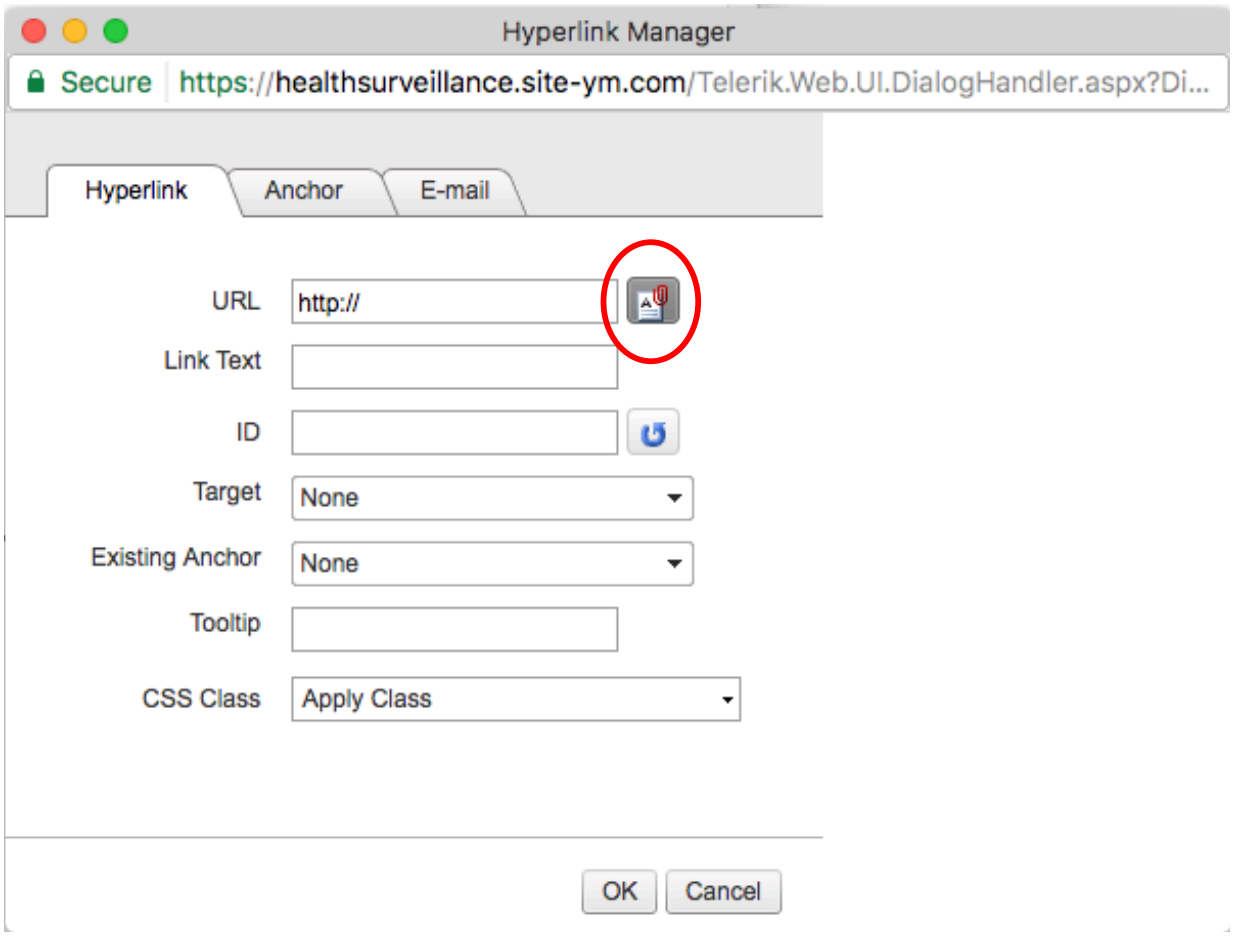
Resource Manager

The "Resource Manager" is one location where group files can stored and organized. When linking to documents in the group workspace (homepage setup, forums, and blogs), files and images will be pulled from this storage space. The Resource Manager is distinct from the File Library, which is organized by "collection" rather than folders and is accessible by all group members. *The resource manager is accessible only to Group Admins.*

How it works: whenever you click on the Hyperlink Manger  icon within an Editor, and you click on the icon of a document with a paper clip, you are pulling files from the Resource Manager. To upload a file into the Resource Manager before creating a link to the file, find the "Upload A File" icon above the text editor or directly locate it under the "Admin" dropdown menu.



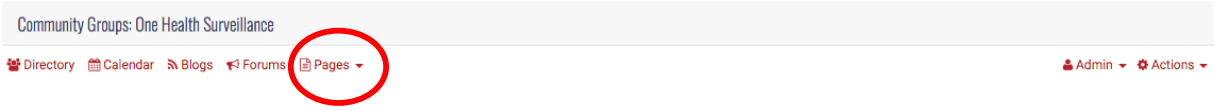
On "Homepage Options"



In the Hyperlink Manager

Custom Pages

"Custom Pages" allows you to create custom webpages to share resources with group members. For example, if a group would like to share documents associated with a particular topic, you as admin could create a custom page around that topic. Custom pages are also the way that groups can share documents through File Libraries. Custom pages display below the group name under "Pages." You can also have a custom page redirect to an external site by pasting a URL in the custom page configuration form.

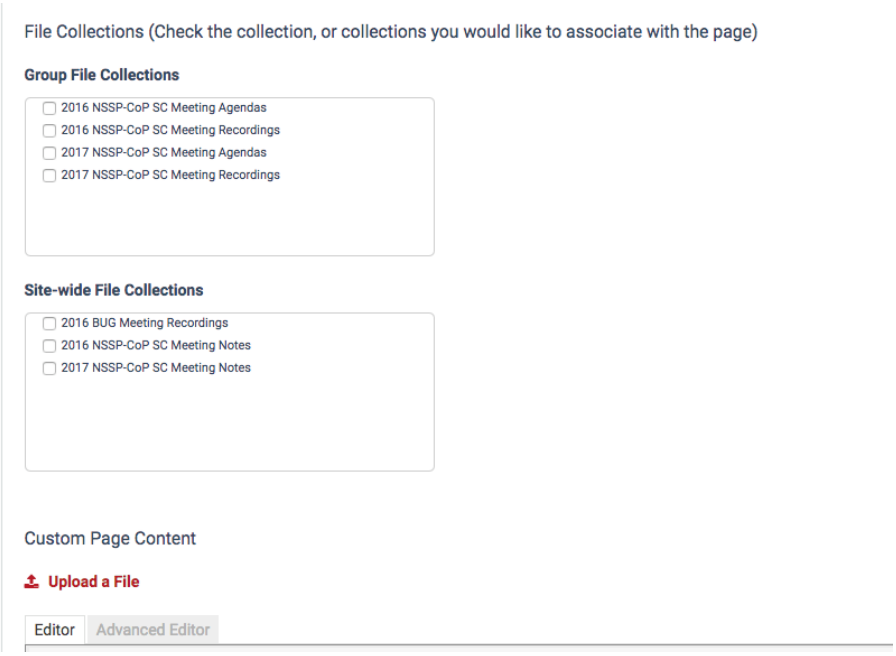


When you click on “Custom Pages,” you will be directed to a page that allows you sort page orders for display under “Group Pages.” Here you can edit existing custom pages and add new ones.

The configuration page when you create a new page asks the following information:

- Page Title
- Show in Group Menu? (under “Pages” on the group homepage)
- Collaboration (Wiki) Mode (allow group members to edit the page?)
- Enable Bookmark Widget? (a social bookmarking tool)
- Redirection (to an external URL)
- Searchable? (by the site’s search index and sitemap)
- Enable Voting and Score?
- RSS Feed URL
- File Collection associations
- Custom Page Content
- New Version Information

To associate a group File Library with a custom page, first, be sure that a File Library has already been created under “File Library.” On the configuration page, group file collections should appear under “File Collections.” You may select multiple collections to associate with a single custom page. However, note that collections will be alphabetically organized on the custom page. If you add text to the editor under “Custom Page Content,” the custom page will display both the text and the selected file collections.



When there are multiple Group Admins assigned to a group, the "New Version Information" section is useful for documenting any updates made to a custom page by different admins.

File Library

Click here to create and manage file libraries to share documents with other group members. For each library, you should typically set the "Collaboration Mode" to allow other group members to upload and update files to the File Library. Refer back to the previous section about associating file collections with a custom page.

Click on the "Manage Files" icon next to a file collection to add items to the collection. At the moment, bulk upload is not available. For each file or URL you upload into a collection, you will need to specify the:

- Name
- Protected, if file? (select "Yes" if you want only logged in *group members* to view and access the file; select "No" if your group is Open or Public and you are ok with any community member accessing the file)
- File to Upload/URL
- Brief Description

Whenever you add or update a file, you will need to check/re-check the "I agree with the terms of the Upload Agreement."

If you adding a protected file to a file collection, do NOT include a link to the protected file in the *description* as the content of the protected file will be indexed and returned if the search keywords exist in the protected file.

Calendar Management

Each group page has its own calendar to store events separately from those listed on the main community calendar. Some events from the main community may appear on your group's calendar (such as general ISDS webinars). These events will be controlled by ISDS staff. Dates and events created in group pages are, by default, added to the site-wide community calendar unless: 1) the group is a Chapter or 2) a group types "MEMBERS ONLY" at the end of their date or event title.

A "Date" will only show the Name and Date of the occasion. It will not be clickable on the group calendar. Dates will appear bolded on your group calendar.

An "Event" is a clickable link on the group calendar that directs to you a page about the event's location, time and more detailed description. You will most likely create a new "Event" instead

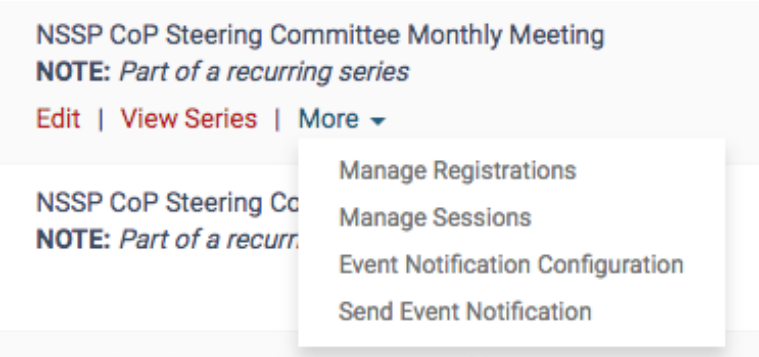
of a “Date” if the occasion is an in-person meeting or call where you need to provide registration information to your members.

If your date or event occurs during the Daylight Savings Period for the year, be sure to check the box for “Event occurs during Daylight Savings/Summer Time, adjust the offset by 1 hour.” Do not check this option if your state does not follow Daylight Savings, or if the date/event does not fall in the Daylight Savings Period.

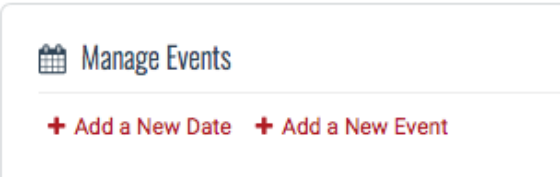
Manage Events

You can view the full list of group-related dates and events, as well as add new ones, here. The page provides information on the name of the occasion, the date it begins and its status. There are additional icons under each date/event listing to:

- Edit Entry
- View Series
- Manage Registrations, if an “Event”
- Manage Session, if an “Event”
- Event Notification Configuration (for configuring RSVP confirmation emails)
- Send Event Notification (to notify group members)



On the Manage Events page, you have two options:



Add a New Date

Click here to directly create a new date. The form asks for information on:

- Active/Inactive Status
- Name
- Short Description
- Date Settings for iCal export
- Recurrence Settings

Add a New Event

In addition to providing the information as you would for a date, you can indicate:

- Is the event visible to signed-in members only?
- Location information
- Contact information
- Registration Settings (ISDS is not currently tracking this information)
- Event Image/Logo
- Description/Comments about the event

Another enhanced feature of an event is the ability add sessions per event. For instance, if a workgroup wanted to create a paper discussion call as a recurring event, but not have it be named on the group calendar as "Paper Discussion Call" multiple times, you go could back to "View Dates & Events" and click on the Manage Sessions icon to create multiple sessions for this one event. When you add a New Session, you give it a new name (ex. "First Paper Discussion Call – April 12, 2017") and specify a different time. This means that you would only need to fill in the Start Date for the "Paper Discussion Call" overarching event.

When you create a new session, you indicate the following:

- Name
- Presenter
- Date & Time
- Allow Overlap? (for registration, if there are conflicting sessions)
- Max. # of Registrants
- Required Tickets
- Optional Tickets
- Session description

Please ignore the fields regarding registration/RSVP, as ISDS is currently using Go To Meeting and Go To Webinar for this function.

Note that you can also add a New Session Group to an event which allows you to group individual sessions together (ex. “Part 1 of Paper Discussion Calls – 2017,” “Part 2 of Paper Discussion Calls – 2018”).

Another couple of instances where creating sessions would be useful include creating webinar series or setting up a conference program.

Photo Management

View All Photes and Manage Photo Albums

Most groups will not utilize this feature so we will not provide details about photo and album management for the time being.

Blog Management

Blogs allow you to post longer articles and share stories with your group members. Each group has its own list of blogs separate from the ISDS blog space. Only group members may post to blogs or comment.

View Blogs

You can view all blogs, sort, and create new ones here. The page also provide information about the number of posts in each blog and the last activity posted.

Start a New Blog

The form to create a new blog includes the following questions:

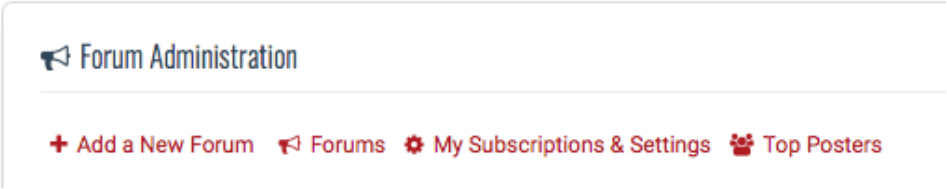
- Blog Name
- Auto-Approve Posts?
- Number of Posts Displayed Per Page
- Ability to Post? (Group Admin only vs. open to group members)
- Ability to Comment? (Group Admin only vs. open to group members)
- Enable Voting and Scores on Posts?
- Enable Voting on Comments?
- Short Description of Blog

Forum Management

Remember that each group has its own designated forum space separate from the general ISDS Forums. It is highly recommended that group discussion be housed in the group forums. Only group members may contribute to discussions.

View Forums

On the Forums Administration page you can see all existing forums and add new ones.



You can change the forum's display order within a category as well as edit its name and description. When you edit a forum, you can choose to have the threads within the forum be sorted by most recent post or topic.

You can also change:

- The forum's archive status
- The forum's locked status
- Indicate whether you would like to enable voting and scores on topics.

Add a New Forum

Directly add a new forum specifying the information listed in the previous section.

View Forum Categories

"Categories" are the designations given to existing forums for sorting purposes on the group forum page. You can view all categories here, edit their names and change their display order on the forum page. You can also add new categories here.

Add a New Category

Click here to directly create a new forum category and assign a sort order.

Member Management

There are three levels of group membership:

1) Any member can join at any time without approval from a Group Admin

2) A member must request to join the group and be approved by a Group Admin
3) A member must be invited by the Group Admin to join the group

View Current Members

Here, you can view current group members, approve any pending members and remove group members. You can also add new members to the group in this section.

View Pending Members

Click here to directly view a list of pending group members that need approval. Group Admins will automatically receive a Message (see "Messages" on the far-right Menu under My Profile) when someone requests to join a group. If you would also like to receive an email when someone requests to join your group, please review your notification preferences and make sure the "Email me when new messages arrive" setting is checked.

View Membership Log

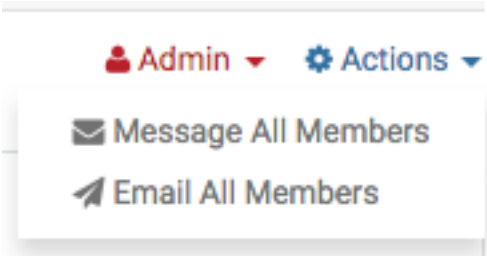
Click here to view a history of the membership requests and approvals for the group

Export Group Members

Group Administrators are able to download a spreadsheet of all members of their group, including information shared on each member's profiles.

Member Communication

Message Group

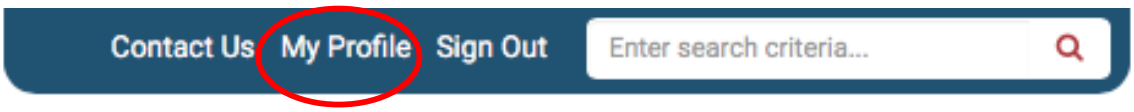


Allows you to send an internal site message to your group members.

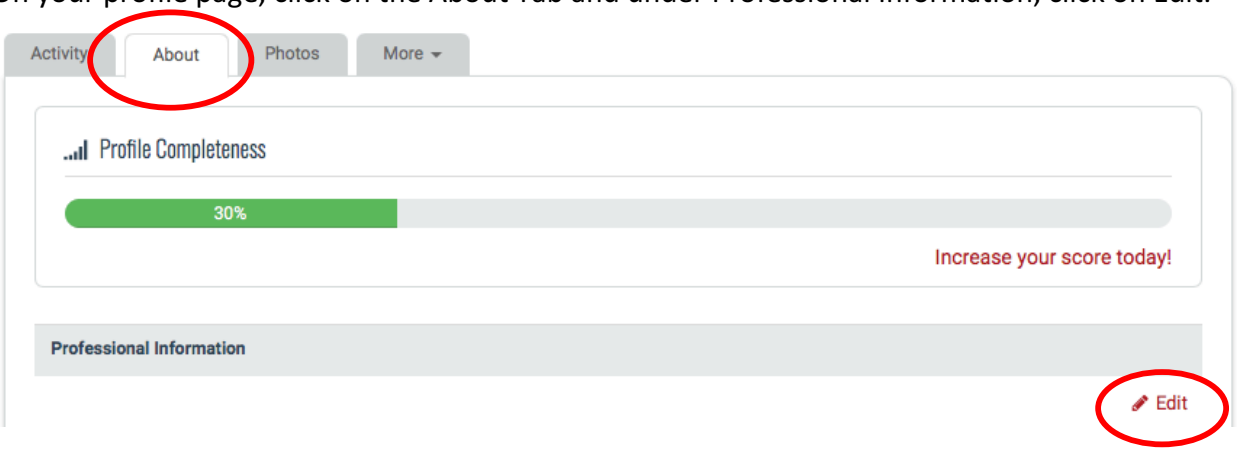
Email All Group Members

Allows you to send an email to all members of an ISDS group.

Members will only receive an email when an internal site message is sent if they have sent their preferences to be emailed when they receive an internal site message. To view your preferences, click on your My Profile page in the top right navigation on any page.



On your profile page, click on the About Tab and under Professional Information, click on Edit.



On the Profile edit page, click on the Information & Settings Tab to update your notifcations preferences and your forum subscriptions.

Frequently Asked Questions (FAQs)

General Questions

Can we have multiple Group Admins and how do I set that up?

Yes. New and additional Group Admins will need to be set up by ISDS staff on the backend of www.healthsurveillance.org. Contact an ISDS staff to request additional Group Admins.

How do I change the privacy settings of the group?

The viewing privileges (accessibility) of the group page are controlled on the backend of the ISDS website. Contact a staff member to change the privacy setting. This setting is separate from group membership, which controls member participation. There are three options:

1) Private – content is viewable to group members only (content is not displayed in site-wide searches); individuals need to request membership to join the group before being able to see any information about the group on the group homepage.
2) Open – content is viewable to all members – Guest or ISDS – who are logged in to the website (content is displayed when a logged-in member performs a site-wide search)
3) Public – content is viewable to the public, no login required

Is there a Group Newsletter and how do I set that up?

The Group Newsletter setting is controlled by ISDS staff on the backend. To request that a newsletter be regularly sent out (preset every 7 days), contact a staff member. Group Newsletters contain updates on all new activity within the past 7 days on a group page.

I am uploading a file. What file extensions are allowed?

AZW, EPUB, MOBI, SCE, SCI and XCOS , 7z, avi, asc, bmp, css, csv, doc, docx, dot, eps, flv, gif, gzip, ics, jpeg, jpg, js, mdb, mov, mp3, mp4, mpeg, mpg, notebook, pdf, png, ppt, pptm, pptx, pps, ppsx, psd, pub, qt, rar, rss, rtf, swf, tif, tiff, txt, wav, wma, wmv, wpd, xls, xlsx, xml, xspf and zip

Unfortunately, our AMS service does not allow users to upload executable code due to security concerns. As a workaround, we recommend users save their code (.r, .sas, etc.) as a .txt or .rtf file before uploading it onto their group page. Please note that ISDS is also exploring other hosting services to allow members to upload and share code.

Calendar Management

How do I add an event on the group calendar?

See Calendar Management.

What's the difference between a 'Date' and an 'Event'?

See Calendar Management.

Will items I add to the Group calendar show up on the main community calendar?

Items you add to your group calendar will be manually "switched on" by staff to appear on the main community calendar as well. The exceptions to this rule are 1) if the group is designated as a Chapter or 2) you indicate in the title of your event "MEMBERS ONLY." If you do not see your group date/event in the main community calendar or would like to have date/event removed from the main site calendar, please contact a staff member who will make these changes from the backend.

Content Management

How do I change the content on a group homepage?

See Homepage Options.

How do I change what appears under 'Features'?

This function is controlled on the Homepage Options page found under the "Admin" dropdown menu.

What can I include in a custom page?

You can include regular text, pictures, and links on a custom page – anything that can be done on the configuration page's editor. You can also associate group file collections with a custom page. See Custom Pages.

How do I add custom pages to the group page?

See Custom Pages. These pages will then appear as a dropdown menu when you click on "Group Pages" on a group homepage, under the group's name.

What's the difference between the Resource Manager and File Library?

The Resource Manager acts as a cloud library to store files and images without URLs for attaching on the group page. The manager can only be accessed by Group Admins.

File libraries can set to be collaborative amongst group members and must be attached to custom pages to be accessed. Any resource uploaded into a file collection will have a unique URL that you can use to link elsewhere. This is the preferred method for uploading and sharing files on a group page.

Can I upload update a file in a File Collection to a new version?

Yes! If the Collaboration (Wiki) Mode is disabled for a file collection, only Group Administrators may replace an existing document with a newer version. If the Collaboration Mode is enabled, any group member may do so.

To replace an existing file:

1) Go to "Manage Collection"
2) Click on the icon of a pencil in the Options column for the item you would like to replace
3) Find the "Choose a file" button by the "File to Upload" label
4) Upload your new file
5) Update the description with version information
6) Click "I agree with the terms of the Upload Agreement"
7) Submit

Forum Management

Can group members add a new forum or forum category?

No. Only Group Admins can create a new forum.

How do I create a new forum?

See Add a New Forum.

Member Management

How I do approve pending members?

See Member Management.

I'm a Group Admin. Do I still need to join the group or request membership?

Unfortunately, our AMS does not automatically add a member to a group even if an ISDS staff member assigns the individual as a Group Admin to a group. Everyone, including Group Admins, must click the icon on the group page to join the group or request membership. As a Group Admin, you are able to go into the group page and approve yourself afterward.

How do I invite members to a group?

This is a hidden feature that allows you add members directly onto a group. If the individual does not have a login with the ISDS site, you will need to direct the person to the group for him/her to join the group himself/herself (the individual will still need to create an ISDS login).

1) Go to "Member Management" and click on "View Current Members"
2) "Search: Entire Community"
3) Type in member's name
4) Results should populate in a list below. If the individual is not already a member of the group, there will be a link that says "ADD TO GROUP" next his/her name
5) You can also remove an individual from the group using this search feature

Additional Questions

For additional questions about Group Administrator roles and functions, please email any of the following ISDS staff:

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