User's Guide

COLABORATORIO

An initiative by

Magic
Middleware for collaborative Applications
and Global virtual Communities

TANDEM

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PRESENTATION

Colaboratorio is a platform developed by RedCLARA to support and promote the collaboration of scientists and academic groups initially intended for users in Latin America.

Thanks to the ELCIRA and MAGIC Projects the platform has evolved into a cloud service that can be incorporated in the websites of the national networks. Thus today the service is used by the NRENs of Ecuador (CEDIA), Colombia (Renata) and Costa Rica (CONARE) in Latin America, in the regional network in the Caribbean (C@ribNET) and in the one of East and Central Africa (WACREN). Additionally, it is in the process of being adopted by the networks of the Middle East (ASREN) and South Africa (SANReN).

To date it hosts around 300 communities and has more than 5,000 registered users from around the world who have the possibility to access and be part of the discussions of current events and communities, create and participate in web conferencing, transfer large files, apply for funding opportunities for project development, meeting partners and collaborators for research projects and to get information about events of interest at global level.

INTRODUCTION

The **Colaboratorio** is a platform developed specifically to support the work of research and education communities with a variety of tools that allow academics to share and promote knowledge, organise joint activities and communicate in real time, a secure and private environment, optimising time and effort.

HOW TO USE THE COLABORATORIO

To start a session, you need to be registered and logged in. From the home page you can access various sections:

The main body. This section includes:

1. **Academic Breaking News:** this section features news and articles about papers of specialized and recognized media about current scientific and academic topics.
2. **Funds Alerts:** this section provides information about funding opportunities for research and/or academic projects as well as a search tool to find possible project partners and collaborators.
3. **Global Agenda:** this section lists events of general interest around the world.

On the right is a section with the latest news and direct links to the communities you access most frequently.
In the left-hand menu you will find links to a variety of collaboration tools:

4. Communities: Creating and participate in academic/research groups.
5. Partner Finder: Search for open funding calls for or a partner/collaborator.
6. VC Espresso: Set up and participate in webconferences.
7. eNVIO: Transfer large files.
8. Global Agenda: Find out about events organised around the world for scientific and academic communities.

KNOWING THE COLABORATORIO
PARTS AND ELEMENTS

Indicator to connection to an advanced network

Logout

Language

User Profile

Home

Funding opportunities

Latest News

Services menu

Scientific articles

Access to events

Acces to frequently used communities

USER PROFILE

Once you have registered and entered the Colaboratorio, you are able to customise your profile. Click on the photo located in the top bar to display a menu with the following options:

- **My profile:** a summary of your information, including your areas of interest, your professional profile (associated to LinkedIn) and a record of your most recent activities in the Colaboratorio.

- **Notifications:** updates about activities of your interest (unread messages, updates about your communities, etc.)

- **Inbox:** messages you have sent to or received from other Colaboratorio members.

- **My contacts:** a list of your Colaboratorio contacts. Here, you can invite other contacts and review your contact requests.

- **My files:** access to your pictures, videos, recordings of your VC Espresso webconferences and your selection of funding alerts.

- **Personal VC Espresso link:** direct URL to your personal VC Espresso webconference room.

- **Configuration:** define your account details, privacy preferences and notifications you want to receive. In "Account Details" you can define the scientific disciplines and sub-disciplines of your interest.

VC ESPRESSO

The **VC Espresso** webconference tool is easy to use and is available 24 hours a day on any computer connected to Internet. The service allows you to schedule and participate in webconferences with others all around the world, whether they are a registered Colaboratorio user or not.

HOW TO USE THE VC ESPRESSO

Once you have logged into the Colaboratorio, you can access **VC Espresso** by clicking on the link in the left-hand menu on the home page.
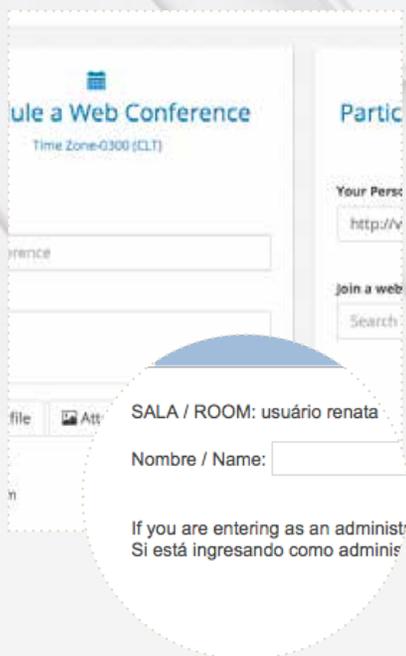
The main page of the service is arranged into three sections. The left-hand section enables you to schedule a webconference. The central section allows you to participate in a web conference. Your scheduled activities can be seen in the right-hand section.

Each user has a personal webconference room. You can access yours by copying the link shown in *"Your Personal Link"* and opening it in your browser. You can invite people to your own **VC Espresso** webconference room by sending them your personal link.

HOW TO SCHEDULE A WEBCONFERENCE

Click on *"Schedule a Webconference"*. You will be able to book a meeting using your personal room or the room of a community you are a member of.

COMPLETE THE FORM:

- VC Name
- Description
- Attach file
- Attach image
- Select Room
- Select Schedule
- Participants

You can schedule a public event or limit the access only to the participants you want to invite. In this case use the option *"Add"*. The system will send an invitation by e-mail to the people you wish to invite.

Scheduled webconferences will appear in *"Scheduled conferences"* and in *"My community conferences"*.

PARTICIPATING IN A WEBCONFERENCE:

In order to access a webconference room, click on the corresponding link under "Scheduled conferences". When asked by the system, enter your name. Once you have entered the webconference room, activate your camera and microphone by clicking on the *"Share your Webcam"* and *"Share your Microphone"* options located at the top left of the screen.

You can adopt two different roles: Participant or Presenter.
As a participant you can control your audio and video, define the language and layout of your screen. Also, you can chat and write notes during the meeting.
As a moderator or presenter, you can also manage the permissions of the participants.

In the window where all participants are listed you can:
- Take or assign the presenter role
- Disable the webcam of any participant
- Mute microphones
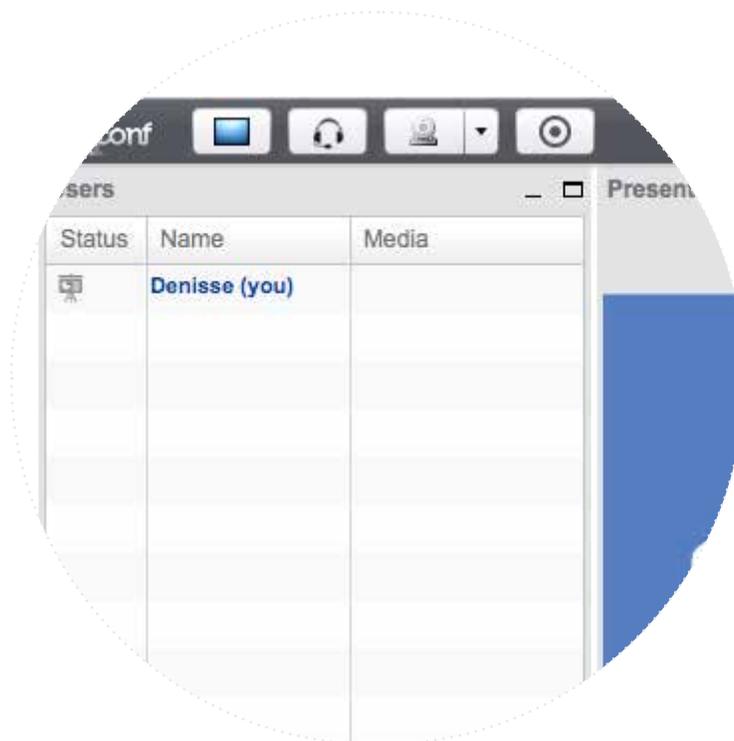
The user acting as presenter can share documents (pdf, presentations or image files) by clicking on *"Upload Presentation"* He/she also has control of the blackboard.

To record the meeting click on *"Start recording"*. To save the recording, stop the recording by clicking the same button and close the session by pressing *"Log out"*.

The recording will be available in *"My Webconferences"* (route: User menu>My Files>My Videos>/My Webconferences). There you can download the file and share it with your contacts.

Screen your Desktop

Share your Webcam

Start record

Open configuration window

Logout

Share you microphone

Settings

Upload Presentations

Download Presentations

Language

PARTNER FINDER
AND FUNDS ALERT

This tool enables you to look for potential partners for your projects. The Funding Alert system provides information about funding available for new projects.

HOW TO USE THE PARTNER FINDER AND FUNDS ALERT

Once you have logged into the Colaboratorio click on "Partner Finder" located on the left side menu.

The main page presents:
- On the left is the menu you see on the Colaboratorio home page: Communities, Partner Finder, VC Espresso, eNVIO and Global Agenda.
- On the right side is a dynamic area which shows information about potential partners, announcements and funding opportunities.
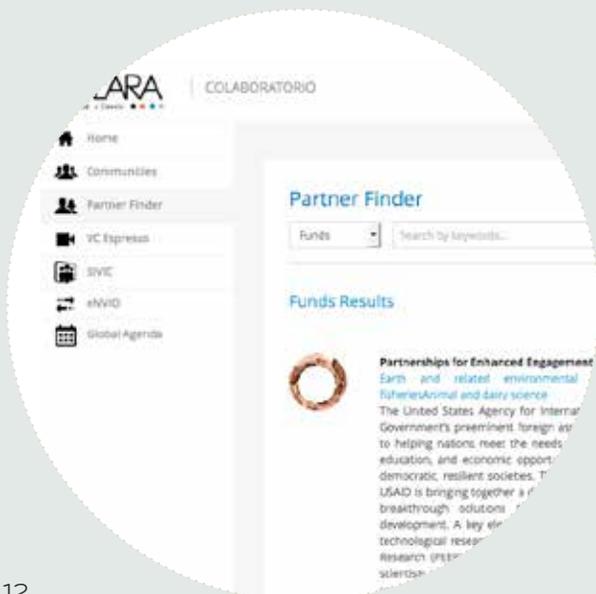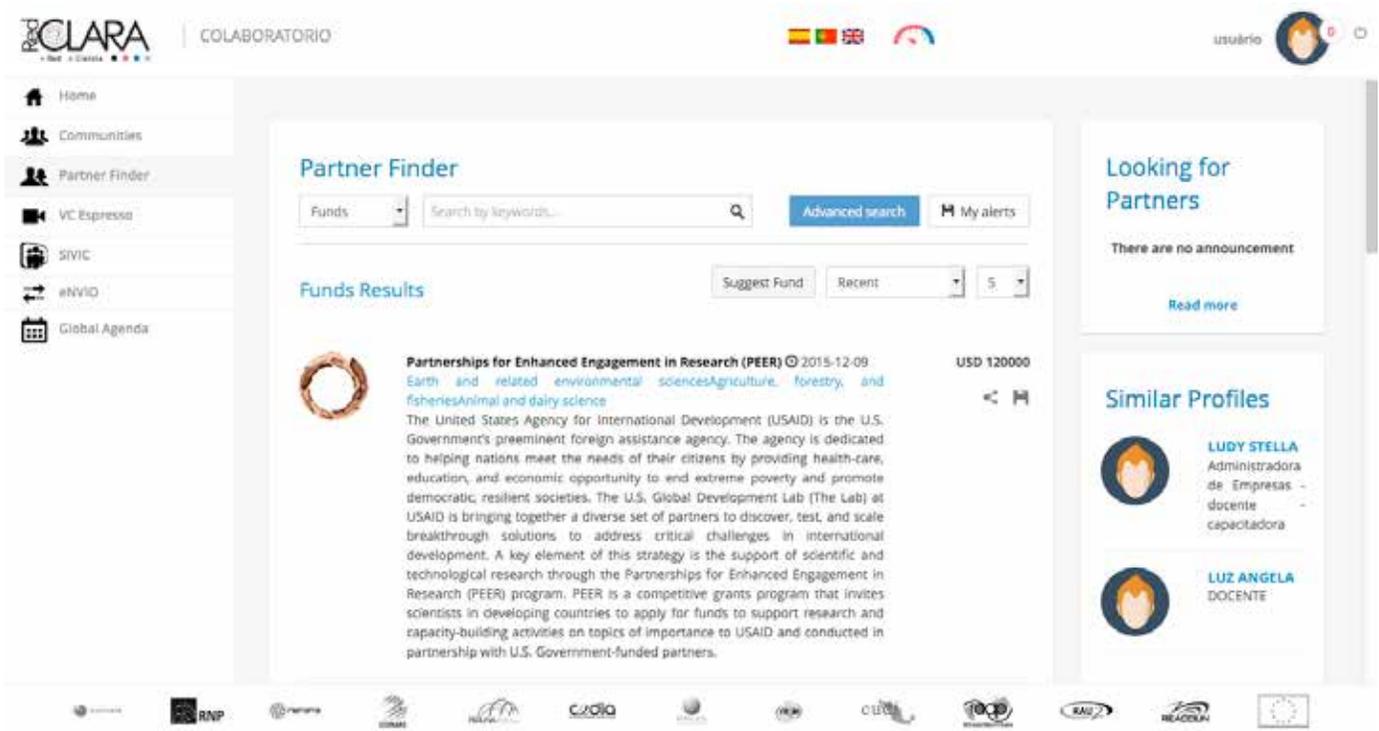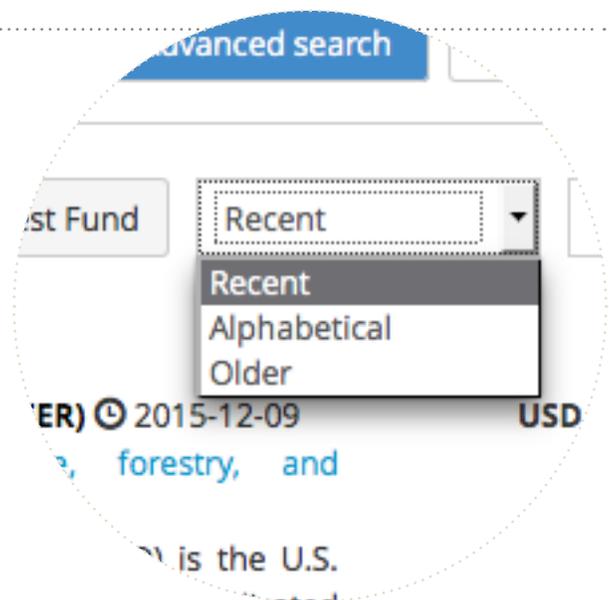
Funds

The Funds tab is in the central section and lists funding opportunities that have been published. You can also use the search tab to locate calls using key words.

You can order funding opportunities chronologically by clicking *"Recent"*.

You can also provide information about a funding opportunity by clicking on the *"Suggest Fund"* option and sending a link and a message to the site administrator.

Announcements

By clicking on the drop-down menu at the top of the page, you can choose between three options: Funds; Partner and Announcements.

Click on *"Announcements"* to see specific messages published by other users with similar interests. At the same time, announcements made by other users and a list of people/users with similar profiles to yours can be seen on the right side of the page.
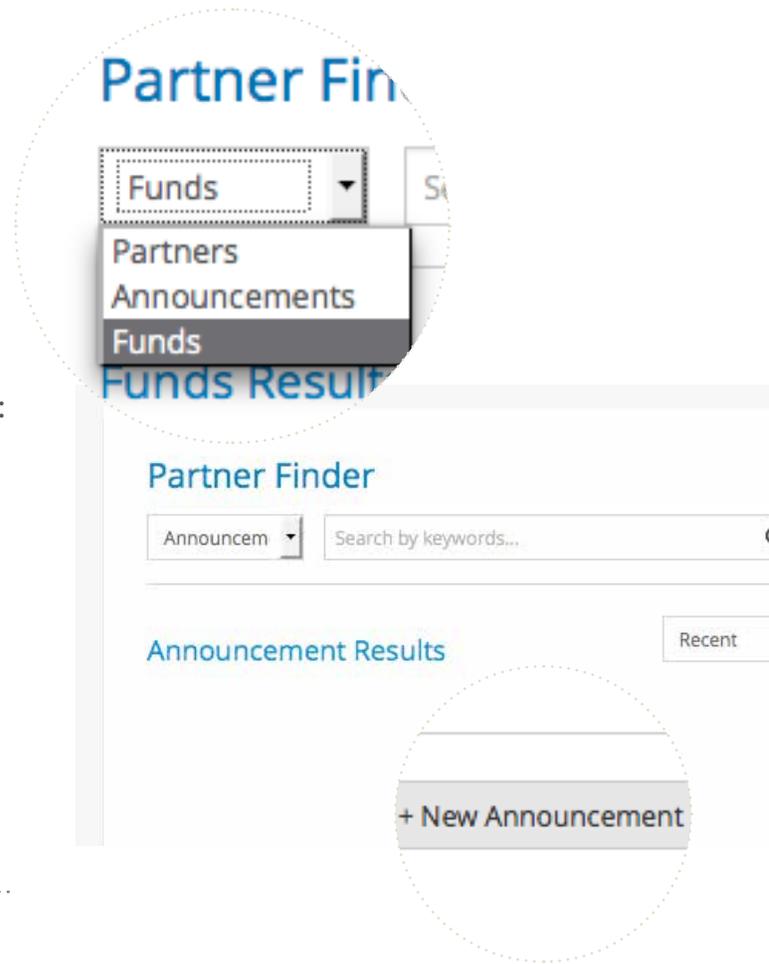
Partner Finder

By clicking on the option *"Partner"*, you can review publications made by other users that have been filtered from the Colaboratorio database. The users whose publications are shown share similar interests with you and are searching for a partner for their projects or are available to join other projects.

You can also publish an announcement, specifying the discipline, country and a brief description of your interests.
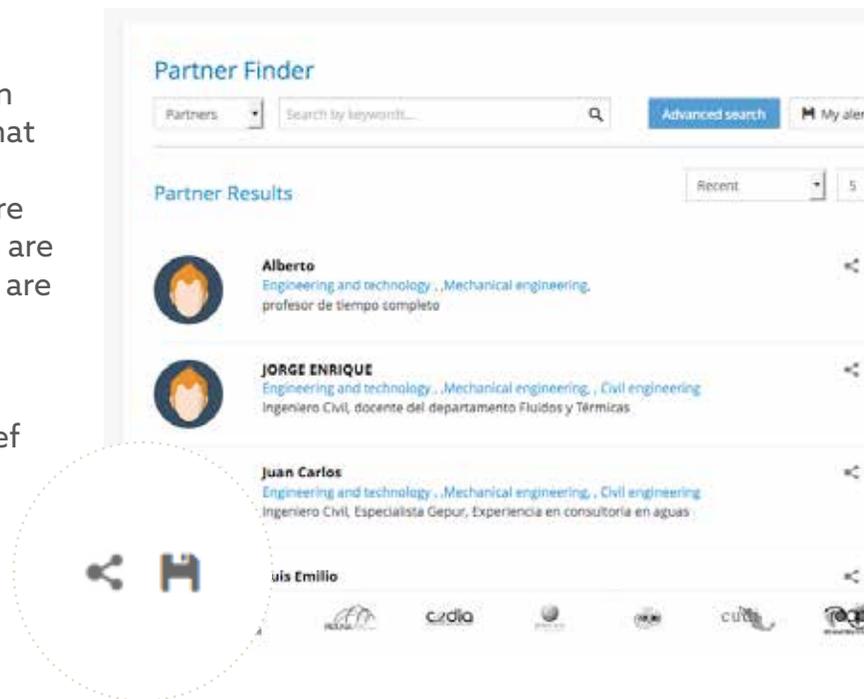
My Alerts

By clicking on the *"My Alerts"* button you can see information saved for you: funding alerts, potential partners and announcements of those looking for collaborators.
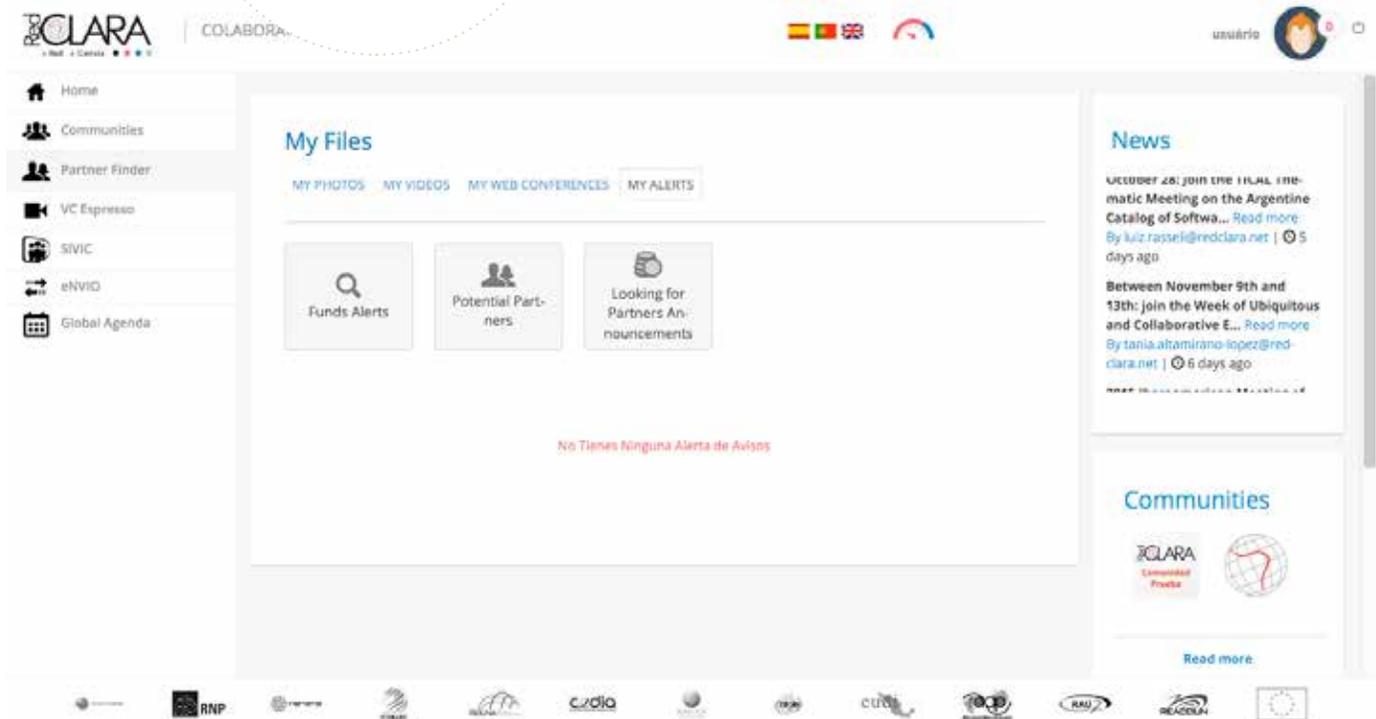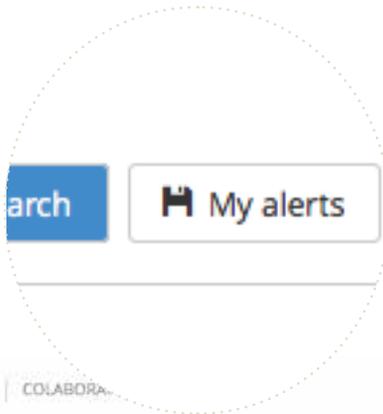
eNVÍO

With this tool you can transfer large files. You can upload documents, images, presentations, videos, and more and share them with colleagues and collaborators in a safe and easy way.

HOW TO USE eNVÍO

Click on the eNVIO link, complete the **To** (recipient's e-mail address), **Subject** and **Message** fields on the form. The **From** field will be automatically completed with your e-mail address.

To select the file to be sent, click on the *"Browse"* button.

Your uploaded file will be stored for 20 days. If you wish to extend or reduce the storage period, you can modify the expiry date. After the storage deadline, the file will be automatically deleted.
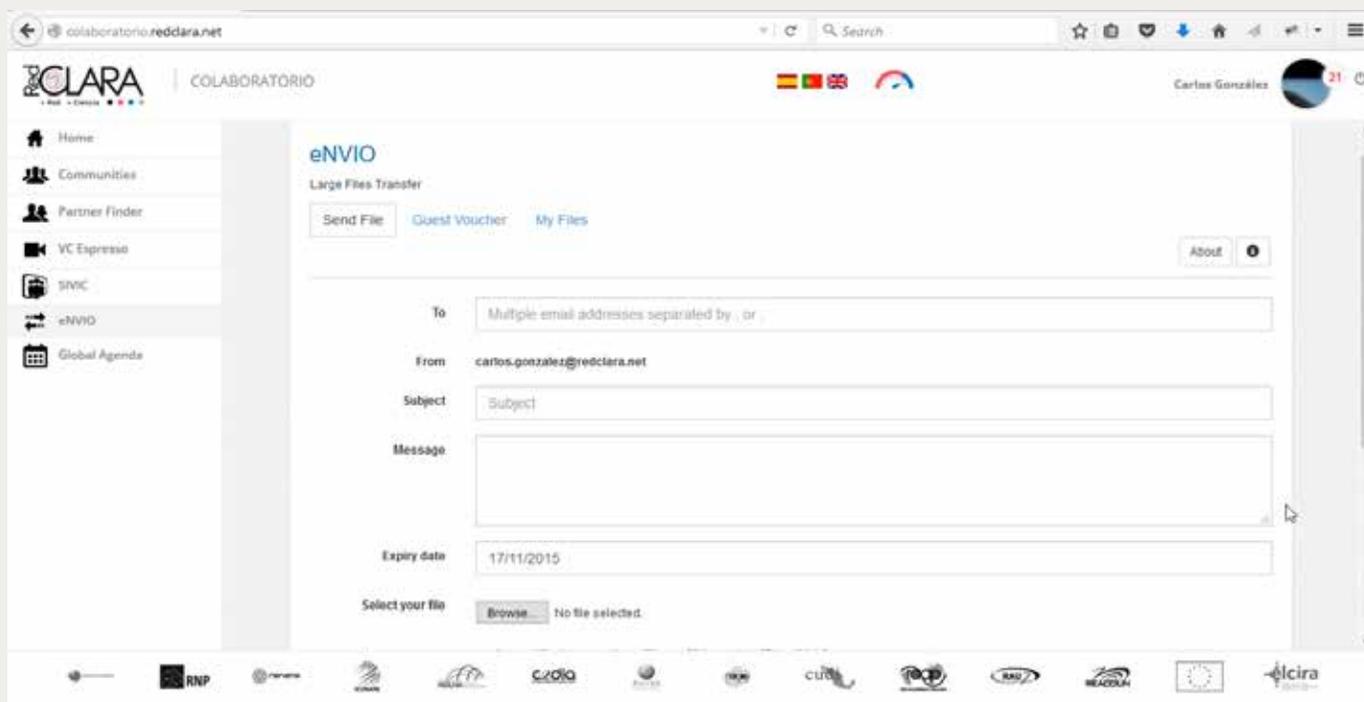
The available disk space for sending files is 10GB. The system accepts files with doc, xls, pdf, docx, odt, xlsx, mov, rar and zip extensions. If you have more than one document or the document has a different extension, it will be necessary to compress it and send it in rar or zip format.

In order to send the file you must accept the terms and conditions of the service. Once you have done all this, press **SEND** and wait until the process is finished.

In **My Files**, you can view delivery information and perform various actions including re-sending, adding a new recipient or downloading the files stored in the cloud.

Recipients will receive a link by e-mail, which will give them access to the page where
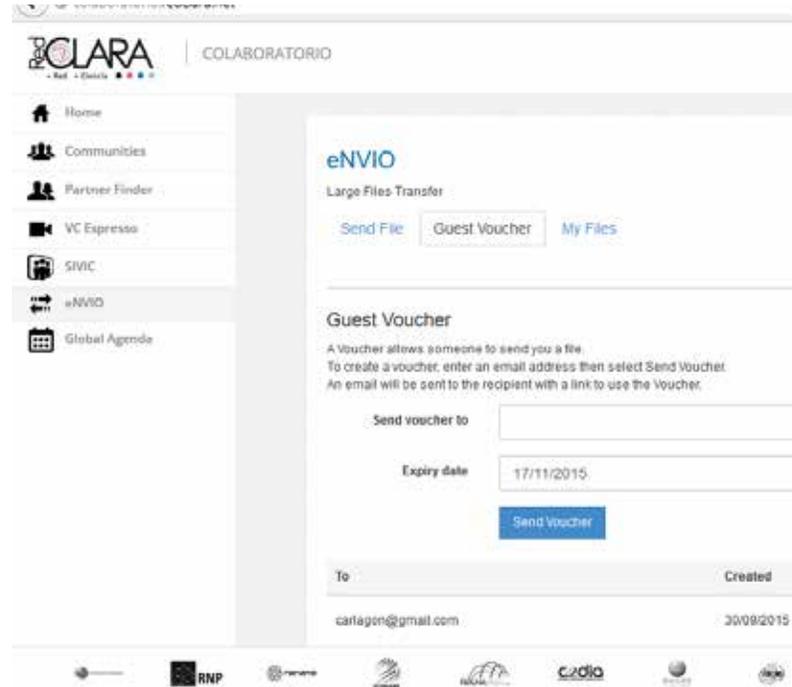
the file is stored. Once there, the recipient should click on the *"Download"* button to retrieve the file.

The system will download the file and will save it on the recipient's PC , where he/she will be able to unzip, view and print it.
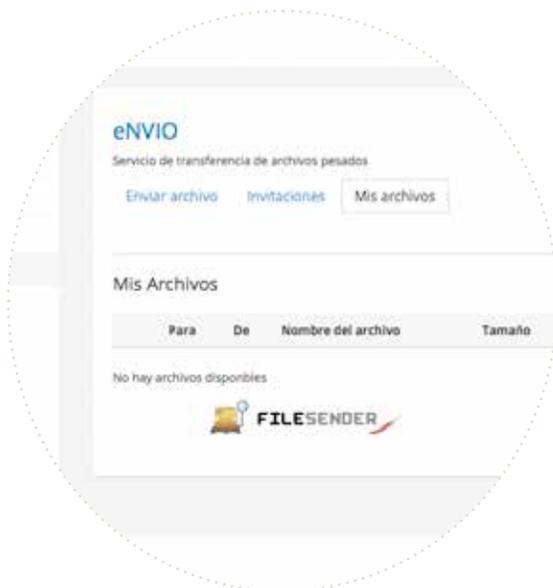
COMMUNITIES

This space is a collaborative environment that allows researchers and academics to carry out activities with their peers and collaborators. To access this area, you need to be logged onto the Colaboratorio.
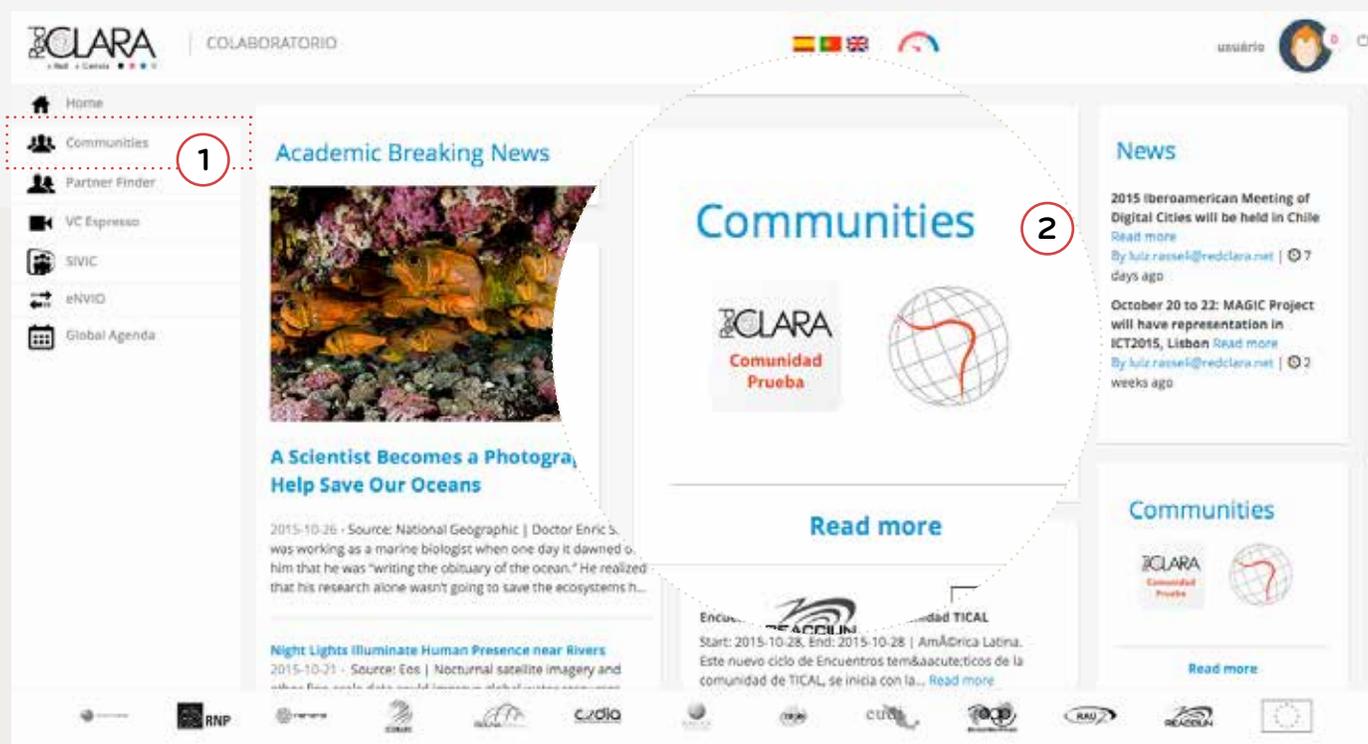
There are two ways to access communities from the Colaboratorio home page:

1. Click on the *"Communities"* option on the left-hand menu to see your full list of total list of Communities. Then click on the Community you wish to access.

2. On the lower right-hand side of the home page, you will see the six communities you work most frequently with. Click on the button of the Community in which you wish to work. (For new users this space will appear empty initially.)

The Communities home page is arranged in three (3) sections:

- The left-hand side shows the same menu as on the Colaboratorio home page: Communities, Partners Finder, VC Espresso, eNVIO and Global Agenda.

- The right-hand side includes events in the Global Agenda.
  In the central area, you will see all communities registered in the Colaboratorio. To find a specific Community, use the the search options at the top of the section.:
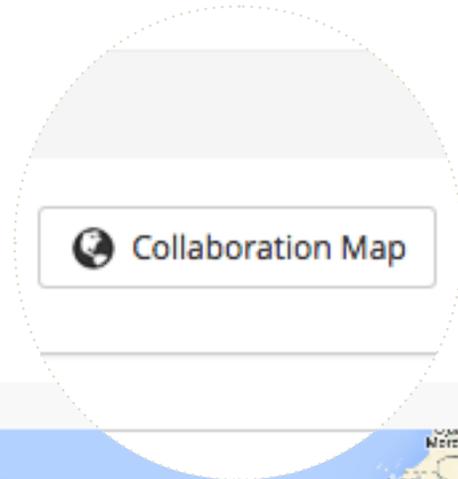
  1. My communities: the Communities created by you or those you are a participant of.
  2. A-Z: All Communities listed in alphabetical order.
  3. Thematic areas: All Communities arranged by scientific theme.
  4. Communities of interest: Communities filtered by scientific themes which correspond to the user profile.

At the top-right of the main page you can also access the **Collaboration Map (5)** and you will find a button for **creating a new community(6)**.
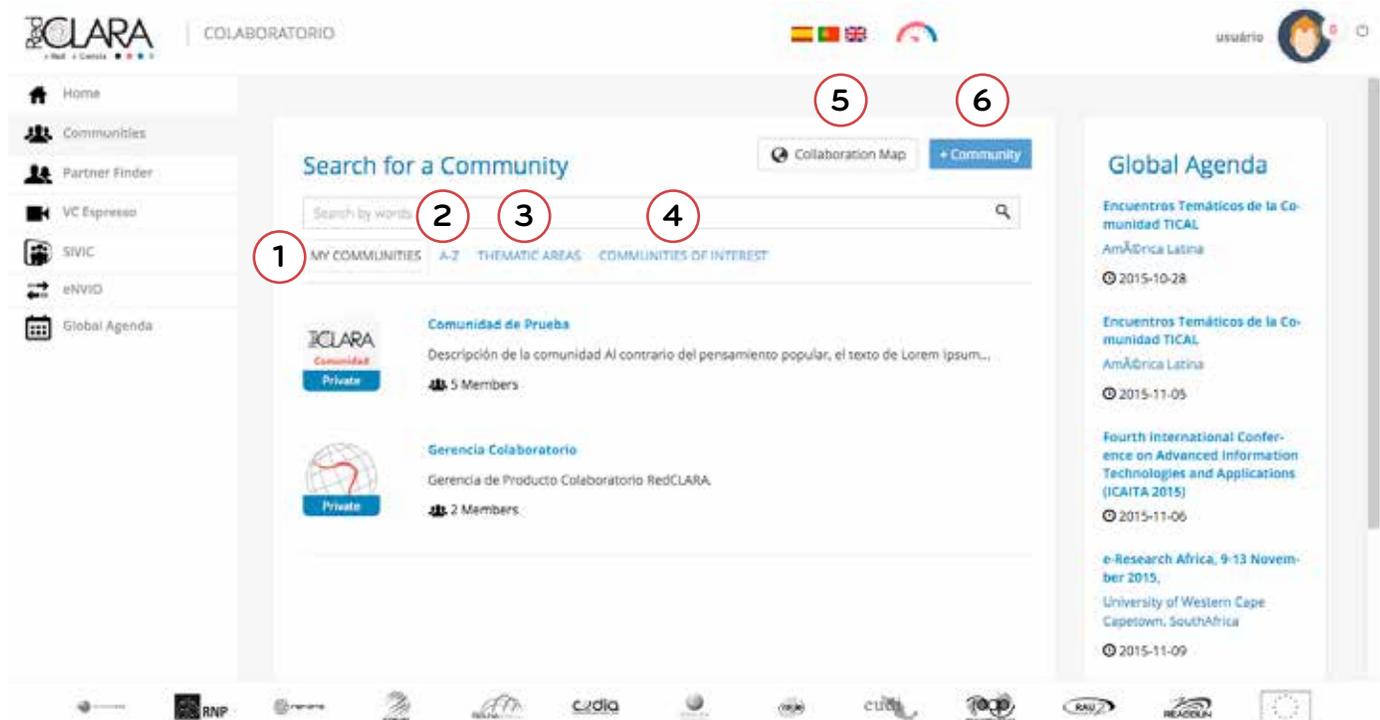
Collaboration Map

This tool consists of an interactive map space where the users can access a database of information related to projects funded by the European Commission's Framework Programmes (e.g. Horizon 2020).

Creating a New Community

In the Community space, click on the button
"+Community"
Complete the form:
- Group name (mandatory)
- Description (mandatory)
- Category (mandatory)
- Albums (optional)
- Videos (optional)
- Events (optional)
- Discussion (optional)
- Notification Settings
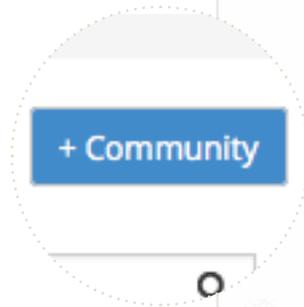
Important Information

The name assigned to the community will automatically be used to create the mailing list. We therefore recommend that you use a short name for the community. Once the community has been created, you can modify the name shown by the Colaboratorio.

Example
Community name: Innovation ICT
Mailing list: Innovation_ict@list.redclara.net

When you click on the *"Create Community"* button, the system will process your request and will send you a welcome message inviting you to enter and customise your community.

The home page of each community includes links to view the members registered to that group, access the community's wiki and to enter the community's VC Espresso room.
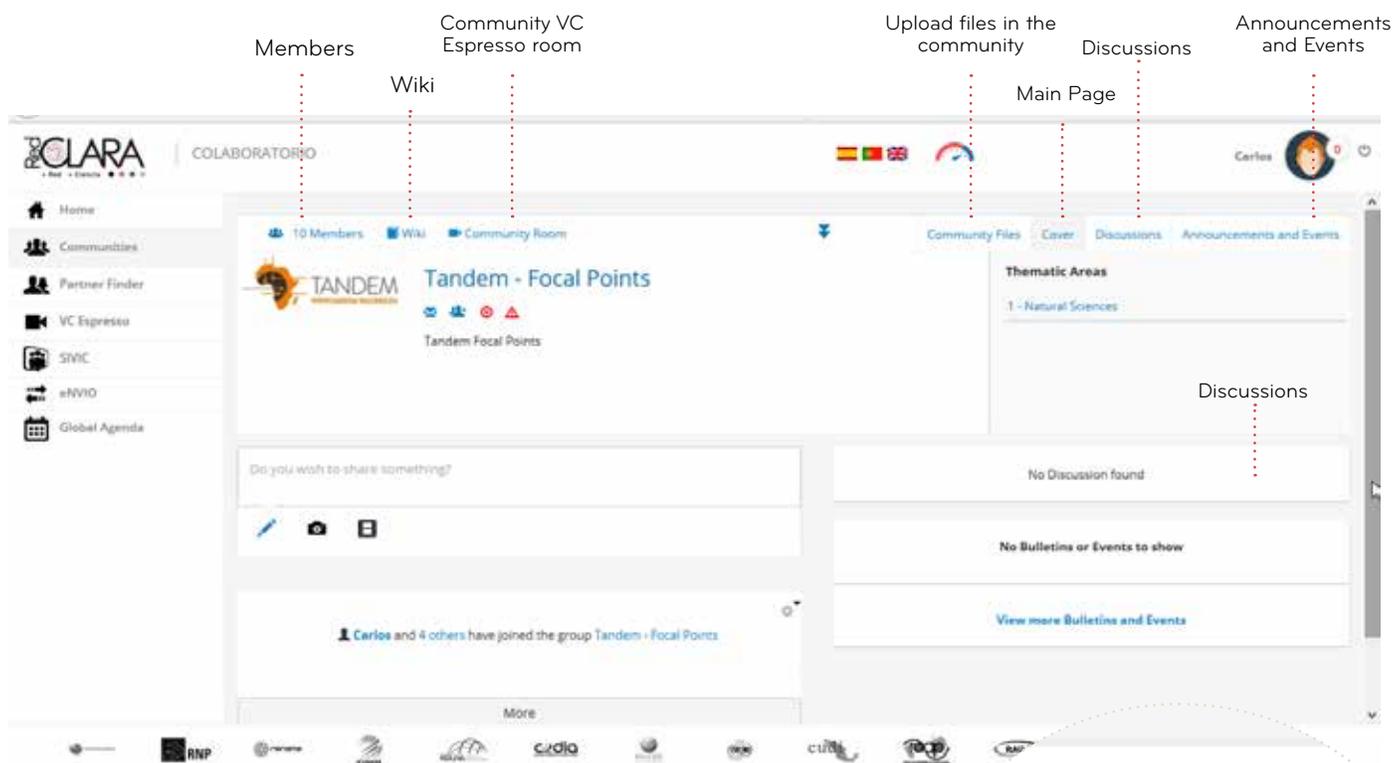
As an administrator you can:

- Invite other members.
- Share short messages, images and videos and create pictures albums.
- Share discussions and notifications.
- Assign administration permissions.
- Invite others to edit /update the content available.

Once the community has been created, it will appear in your *"My communities"* area.

Inviting members to join a community

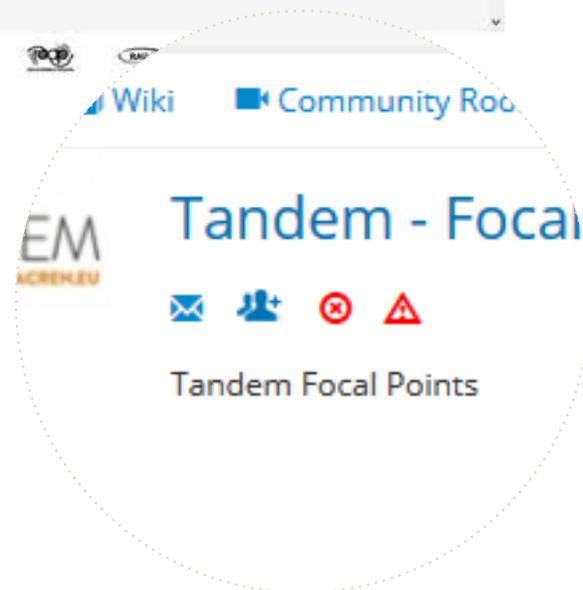To invite colleagues join a community, click on *"Invite Contacts"*. If the contact is registered on the Colaboratorio, select the name in *"My contacts".* If the person is not registered on the Colaboratorio, use the *"Invite by Email"* option. Then, add a message and press *"Send Invitations"*. You can invite more than one person at the same time.

In *"Communities"* you will find the groups created on the Colaboratorio. In order to join a private community, select *"Join Community"* and wait for the answer of the administrator. If the community is public, by clicking the *"Join Community"* button you will automatically be part of the group.

Invite Contacts   ✕

    Type your friend's name...

    My Contacts   Selected
    No result found.

    Invite by Email (Separate each email with a comma.):   Select All
    Add Personal Message:

WiKi

This application supports and enhances knowledge management, and makes it easy to generate, edit and storage texts in a collaborative way.
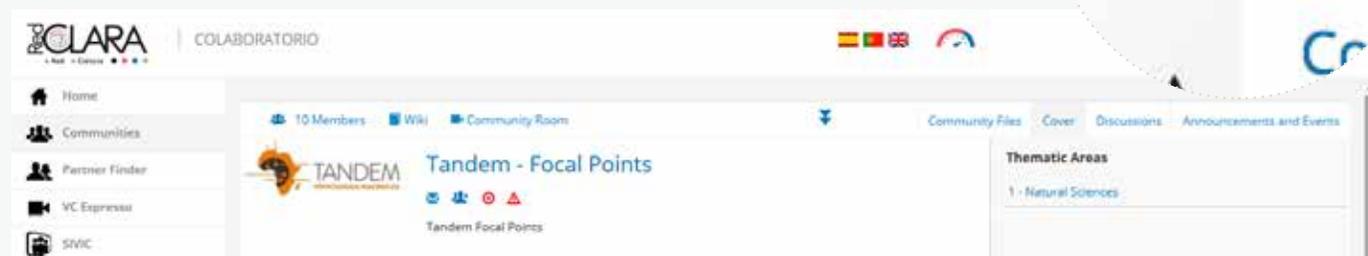
In order to access your community's Wiki click on the button at the top of the page. The first time you enter, the screen will display general indications about the system. You can customise the page by clicking on the option *"Edit"*, located in the configuration menu ⚙.
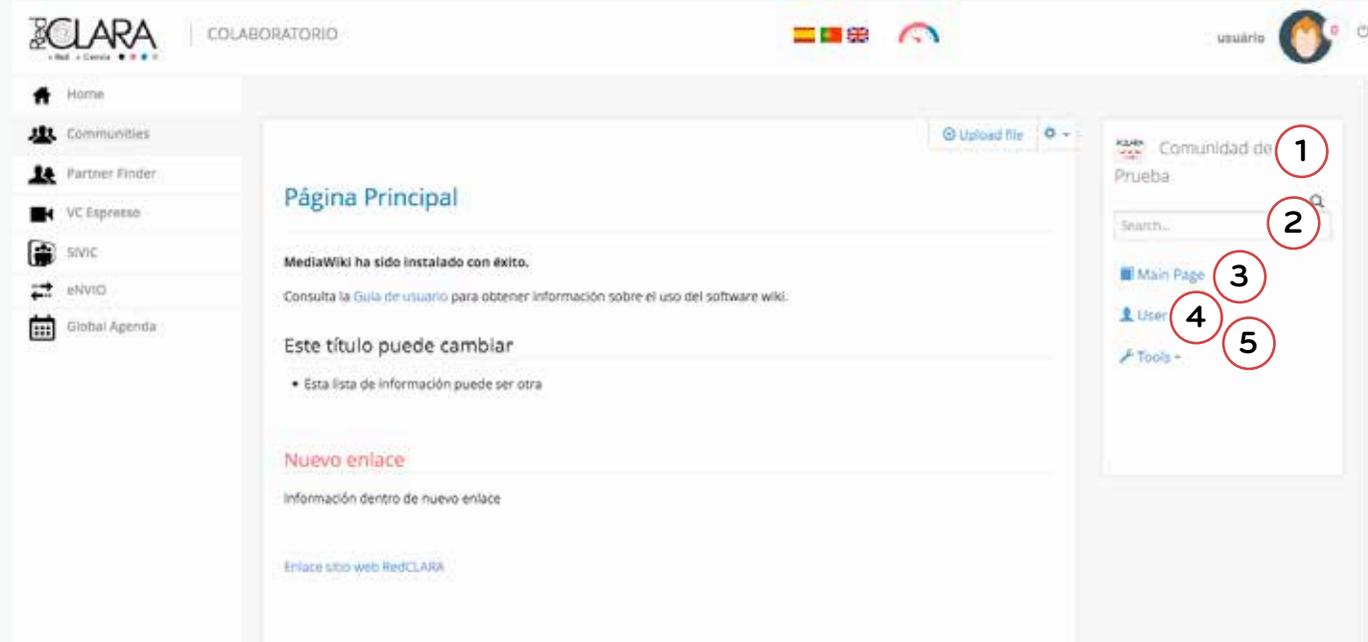
Via the main page you can access all content generated by the community, which is visible to all community members. This page is organised in three (3) sections. The general menu of the Colaboratorio is displayed on the left. On the right is a menu to navigate within the community and the community Wiki:

1. Community Icon: a link which enables you to return to the main page of the community
2. Browser: search contents in the wiki using key words
3. Main page: link to the main page of wiki
4. User: include the options *"Discusión"* (Discussion), *"Preferencias"* (Preferences) *"Lista de seguimiento"* (Watchlist) and *"Contribuciones"* (Contributions).
5. Tools: allows you to access special pages and identify recent changes on the wiki.

The central body (3) of the main page is a space to display all the themes and sections of the wiki by clicking on *"Content"*. From there click on titles and subtitles and explore each segment of your interest.
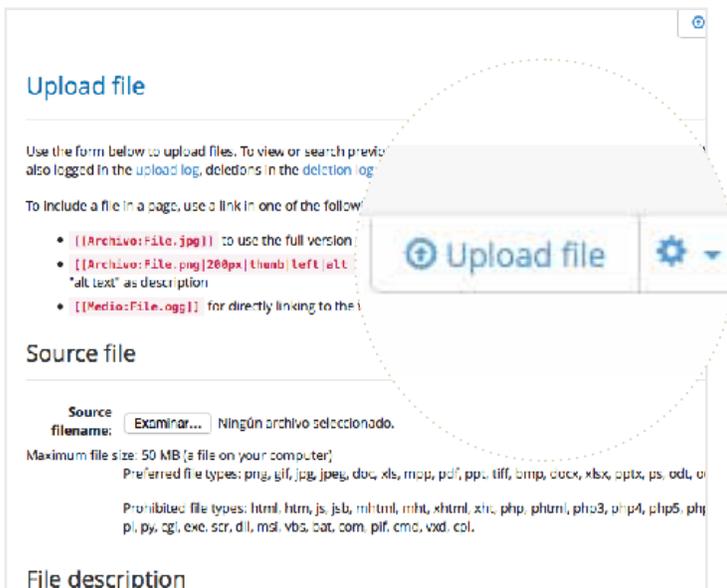
Uploading Files

Click on the button *"Upload file"* to upload the document. The formats permitted by the system are jpg, doc, pdf, ppt and zip. When the file has been uploaded click on *"Save"* and the document will be ready to be used.

How to link a file

- Upload the file you want to make available to community members.
- Go to the page in which you want to include the file uploaded.
- In the option *"Configuration"* select *"Edit"*
- Select the word or text which will include the link and click on *"Link"* located in the tool bar. If you want to create a new page write the word or text which you wish to link to the file from.
- A window will open. Here write in *"Define the wiki page for the link target"* the command *"File:"*. The system will display in the following window the files available (Uploaded by the user or other users).
- Save the page and the link will be active.
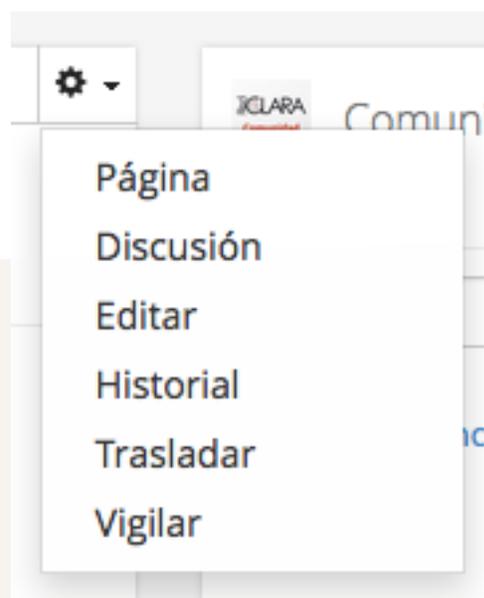
How to collaborate

The user can initiate or participate in discussions and add information by creating new pages or modifying existing ones.

If you want to create a collaborative document, the content must be created in the Wiki pages. Thus your peers can make changes on they may be reflected directly in the document. When you share a file loading it in the system, your colleagues must download, edit and upload it again, creating multiple versions. The option to upload a file is suggested as the content is for consultation and not a document for a work in progress.

Edit content available.

To modify the content of a page, click on "Edit" of the menu *"Configuration"* ⚙ and select the part that you wish to modify. Once you have finished editing, click *"Save the page"*.

Create a new page.

To create a new page from the main page or from an existing one, go to the *"Configuration"* ⚙ menu, click on the option *"Edit"*. On the displayed page (main page or other) type the name of the page to be created, select it and use the hyperlink tool from the menu write in *"Define the wiki page for the link target"* the same name defined for the page. Clic on the *"Ok"* button and then in *"Save Page"*. The link will appear in red, because the page does not exist yet. Click on it. The system will include a warning indicating that the content does not exist. Click on the option *"Create"* in *"Configuration"* ⚙ and the new page will open. Once you have finished, click on *"Save page"*. The system will save the information in the wiki and it will remain available. The link will change to blue.

Credits

The user can initiate or participate in discussions and add information by creating new pages or modifying existing ones.
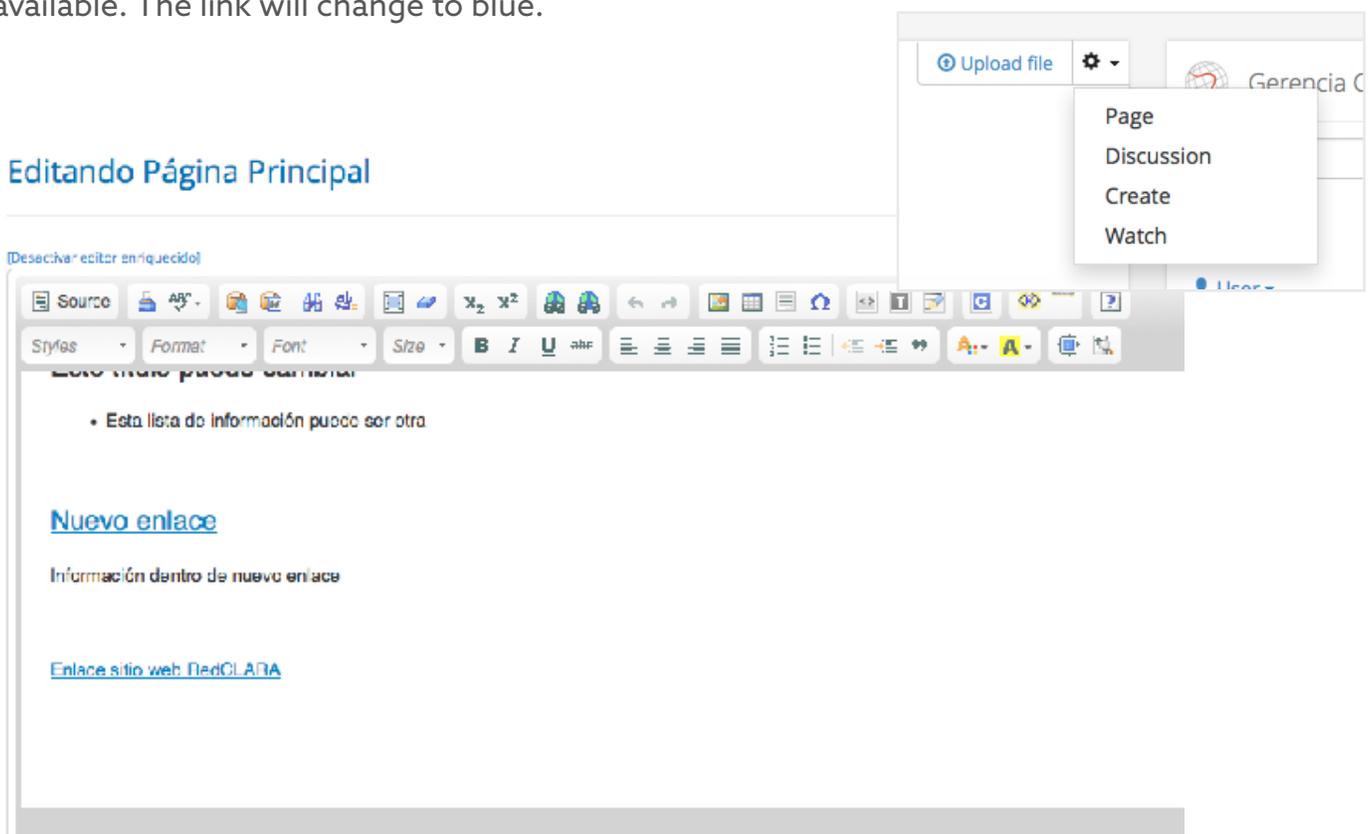If you want to create a collaborative document, the content must be created in the Wiki pages. Thus your peers can make changes on they may be reflected directly in the document. When you share a file, loading it in the system, your colleagues must download, edit and upload it again, creating multiple versions. The option to upload a file is suggested as the content is for consultation and not a document for a work in progress.

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