

myPortfolio - Participate

Create and manage groups in myPortfolio

1. Groups

Every myPortfolio user can create groups and invite or add other myPortfolio users to the group. To create a group, go to *Groups* from the Burger menu via *Engage* and then click *Create Group*.

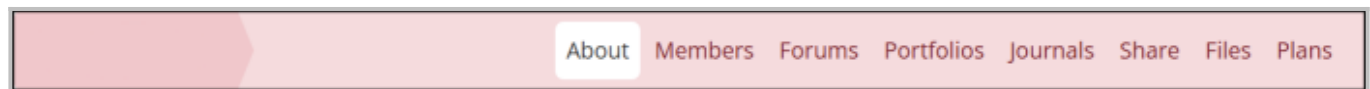


Abb. 1: Group menu

myPortfolio groups have the following sections:

- About (start and overview page)
- Members (overview of members, roles)
- Forums (Exchange in forums)
- Pages and Collections (for creating and editing shared pages and collections)
- Blogs (for capturing thoughts in the form of blog entries)
- Sharing (for sharing group views)
- Files (for uploading and saving shared files)
- Other options if applicable

In groups that you create yourself, members can either be administrators of the group or participants. A „group founder“ is automatically an administrator of the group and members who join the group are participants. In the *Members* section you can see the roles of the members. Administrators can assign a different role to members if necessary.

1.1 Creating a group

1. There are three options for creating a group in myPortfolio:

- In the *Burger menu*, select the menu item *Engage* and then the sub-item *Groups*.
- You can access the group settings by clicking on *My Groups* above your profile tab.
- To create a group in myPortfolio, click *Engage* on the homepage, the so-called dashboard.

[02_-_participate_create_group.pngg](#)

Abb. 2: Ways to create a group

2. Enter the name of the group and, if necessary, a description. In the *Settings* section, specify, for example, whether your group is freely accessible or whether new members must be confirmed by you or even invited.

3. By clicking on *Save group* your group is created and you are on the *About us* page of the newly created

group.



Note:

All your groups are listed under your name on the home page. If you are the administrator of a group, this is shown in brackets. Click on the group name to go directly to the group. Group invitations can be found under their name on the home page. Clicking on it will take you to the page where you can confirm or decline them.

1.2 Settings of a group

Below are the options within the settings dropdown listed and explained in the order you can make them as a group administrator. Proceed as follows:

Groups → My Groups → Settings

or

Groups → My Groups → Group Name → Settings.

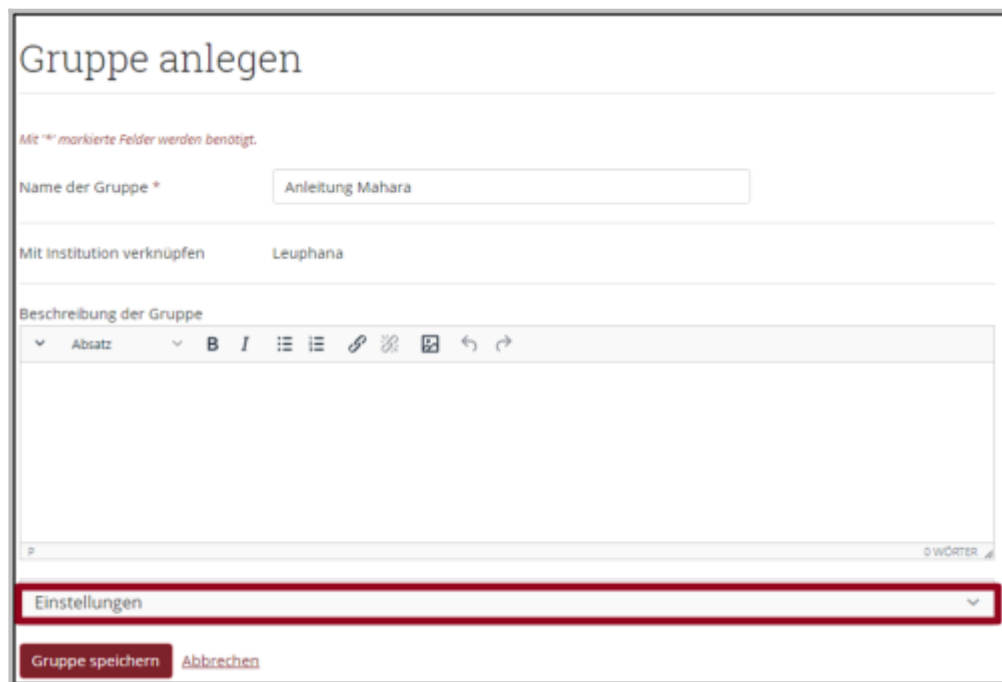


Abb. 3: Gruppeneinstellungen

1.2.1 Membership

| Option | Meaning | Explanation |
|------------|-----------------------|--|
| Open | Open membership | Any myPortfolio user can join the group without the need for approval from a group administrator. |
| Request | Request membership | All myPortfolio users can send a membership request. Group administrators can accept or reject the request. |
| Controlled | Controlled membership | Only administrators or staff members can make this setting. In this case, members can no longer write themselves out. Only group administrators can add or remove members. |



| | | |
|---------------------------|--------------------------------|--|
| Invitations from contacts | Members can invite contacts | If the option is selected, members can invite their contacts to the group. Group administrators can also invite users at any time. |
| Recommendation | Recommendations to non-members | When this option is selected, members can easily invite their contacts via a button on the About group page. |
| No option selected | Only invitations | myPortfolio users can join the group only if they have received an invitation (from an administrator). |

1.2.2 Content

You can define who is allowed to create and edit content in the group area in the settings under Content → Create and edit. There are three options to choose from here:

| Option/Setting | Meaning |
|-----------------------------|--|
| All group members | All group members can create and edit views. |
| All except for participants | All group members, except for participants, can create and edit views. |
| Group administrators | Only group administrators can create views. |

1.2.3 Visibility

In the *Visibility* section you can enable the *Participation report* option with a check mark, which will provide group administrators with a report on group views, views shared with the group and information about who has commented/provided feedback on views.

1.2.4 Editability

In the Editable area, you can specify a start time and/or end time, if necessary. This defines how long or from/until when group members can make changes in the group (upload files, edit views, etc.).

1.2.5 General

Under *General* you can e.g. make settings who should be notified about the release of a new view within the group or about a new comment:

- None
- All group members
- All except normal members
- Group administrators

1.3 Invite / add myPortfolio users to a group

As an administrator, you can invite or add myPortfolio users to your group.



a) Invite / add via the profile view

If you want to invite or add an individual person to a group, you can initiate this from the person's profile view:

- Go to the profile view of the person. If necessary, first search for the person using the search bar at the top of the screen. Click on the person's name or profile picture to access their profile view.
- In the upper area of the profile view, you can now select the group to which the person should be invited or added.

b) Send multiple invitations

If you want to invite several people to a group at the same time, you can do it in the group in the *Members* section:

1. In the *Members* section of your group, click *Send multiple invitations* at once.

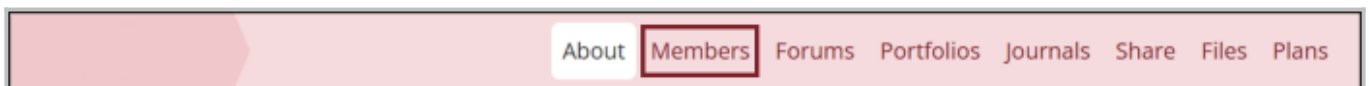


Abb. 4: Members

2. Now use the search field (1) or the list of possible members (2) to search for people who should receive an invitation. Double-click on a name to add the person to the *list of users to be invited*. Alternatively, you can mark the person in the left list by clicking on it once and add it to the right list by clicking on the arrow pointing to the right.



Abb. 5: Members search

3. Clicking *Submit* sends invitations to the selected users. A confirmation that invitations have been sent will be displayed. Invitations that are still pending, i.e. have not yet been confirmed, can be found in the *Members* section.

1.4 Confirm group invitations

If you have been invited to a group, you will find the group invitation under your name on the home page. Click on the invitation and confirm your membership in the group by clicking *Confirm*.

2. Forums

In the Forums group area, you can create forums („discussion rooms“) on specific topics.

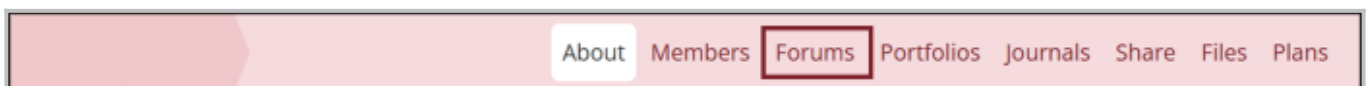


Abb. 6: Forums

2.1 Create a forum

1. In the Forum section, go to *New Forum*.



Abb. 7: Creating a new forum

2. Assign a title for the forum, add a description and set the *forum mode*.

3. By clicking on Forum Settings you can make further settings for the forum. Explanations can be found in the following list:

- **Group members automatically enroll:**
- If group members should automatically receive all forum posts, i.e. subscribe to the forum, activate this option.
- However, group members can unsubscribe from the forum, i.e. unsubscribe from the forum
- **Allow users to log out themselves:**
- Select whether group members can log out independently.
- **Order:**
- Select the location in the order in which the forum should appear. Here you have the option to place the forum before or after the General Discussion forum.
- **Moderation:**
- You can appoint people as moderators of the forum, who can thereby edit or delete posts, for example
- **Who can create discussion topics:**
- All group members - any group member can start new discussion topics and reply to existing topics.
- Only moderators and group administrators - only moderators and group administrators can start new discussion topics. Once a topic has been posted, anyone can reply to it.
- **Close new themes:**
- If this option is set, new topics in this forum will be closed by default. Only the moderators and group administrators can edit the topics.

2.2 Write a post in a forum

1. In the Forums section, click the name of the appropriate forum and then click the *New Discussion Topic* tab.

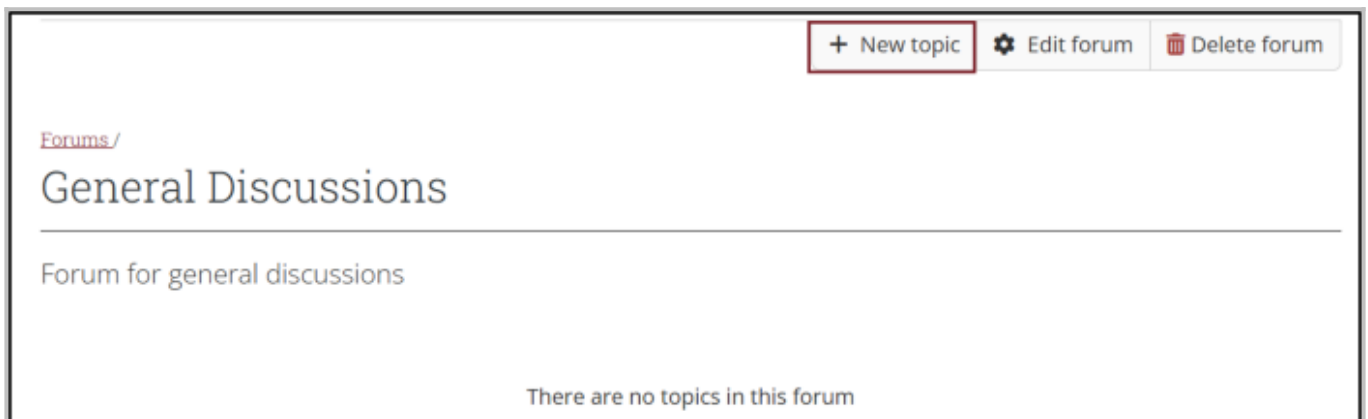


Abb. 8: New forum topic

2. Enter a subject and your message, specify whether it's a *pinned topic* or a *closed topic* if necessary, and whether you want to send a message now (rather than after a few minutes). Finally, click *Submit Post*.

Note: „Pinned topics“ are listed at the top of the discussion topics, group administrators can make them. „Closed topics“ (indicated by the lock icon) can only be edited by administrators.

2.3 Reply to posts in forums

1. In the *Forums* section, go to the appropriate forum. Click the name of the discussion topic and then click *Reply*.
2. Compose your message and send it via *Send post*. Your reply will now appear under the post you replied to. There is an option to edit the post, reply to it or delete it.



Abb. 9: Replying to a forum post

Die Entwicklung erfolgte durch Mitarbeitende des Leuphana Lehrservice (lehrservice@leuphana.de)



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