Student Manual
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The Facilitation for Dgroups Administrators - Student Manual is part of a series of Internet training (ITrain) materials developed by the ITrain Network. The ITrain Network consists of individuals and institutions from around the world with a wide range of technical and training expertise in information and communication technologies. The ITrain materials are available for free and are under the OpenContent License (http://www.opencontent.org/), the full text of which can be found on the last page of this manual. The ITrain materials can be obtained from the ITrain Web site at http://www.bellanet.org/itrain/.

The training material methodology is a result of a needs analysis conducted in November and December of 1997 and subsequent consultations with experts and users, including field testing. The materials are developed for use by Internet trainers and users in developing countries. If you are an individual or an institution engaged in delivering basic or advanced Internet training courses or a user who is seeking a simple, flexible and effective Internet training guide, these materials are for you.

The Facilitation for Dgroups Administrators Student Manual will enable you to setup and manage online discussions using the Dgroups platform.
About Dgroups

What is Dgroups?

Dgroups is an online home for groups and communities interested in international development. You can find Dgroups online at: http://www.dgroups.org

In Dgroups, one can find the online tools and services needed to support the activities of a team, a group, a network, a partnership or a community. Each Dgroup has a mailing list to support group communication, and an online space for archives of messages, participant profiles, resource sharing (documents, links, news articles), and (optionally) an events calendar. Dgroups is also a place to find groups who are interested in the same topics in international development as you.

Who is Dgroups?

The people leading Dgroups have formed the Dgroups Partnership. Current partners, as of January 2004 include:

- Bellanet International Secretariat [www.bellanet.org]
- Department for International Development (DFID) [http://www.dfid.gov.uk]
- Humanist Institute for Co-operation with Developing Countries (Hivos) [http://www.hivos.nl]
- Institute for Connectivity in the Americas (ICA) [http://www.icamericas.net]
- International Institute for Communication and Development (IICD) [http://www.iicd.org]
- OneWorld [http://www.oneworld.net]

Members include:

- Canadian International Development Agency (CIDA) [http://www.acdi-cida.gc.ca]
- Danish International Development Assistance (Danida) [http://www.um.dk/danida]
- Food and Agriculture Organization of the United Nations (FAO) [http://www.fao.org]
- International Development Research Centre (IDRC) [http://www.idrc.ca]
- Swedish International Development Cooperation Agency (Sida) [http://www.sida.se]
- Swiss Agency for Development and Cooperation (SDC) [http://www.deza.admin.ch]
- United Nations Economic Commission for Africa (UNECA) [http://www.uneca.org]

The system is currently hosted by Bellanet on behalf of the partnership, but the Dgroups brand belongs to all partners.
See section 12 (b) of this manual for more information on Dgroups partnership categories.

Why Dgroups?

There is an ever increasing number of development organisations that want to have online groups or communities. Instead of creating separate solutions, why not come together and support a platform not just for each other, but for the entire development community?

The partners see support for Dgroups as a way to provide such a platform, while at the same time to provide a valuable service to their respective stakeholders and networks, and an easy way for individuals to find the groups and communities of interest to them.

Why create something new? Because until today, the partners know of no comparable service which is as simple, non-commercial (no advertisements), respectful of privacy, and targeted at low bandwidth users in the South.

For more information on Dgroups, please visit the website, or contact Mark Faul of Bellanet by email mfaul@bellanet.org or by phone at +1-613-236-6163 ext. 2388
Day 1 – Introducing, Planning & Setting up Dgroups

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>930-940</td>
<td>1. Overview</td>
<td><strong>Agenda:</strong> Introductions. Explain prerequisites. Hand out student manuals. Discuss the day’s agenda</td>
</tr>
<tr>
<td>940-1000</td>
<td>2. Introduction &amp; Expectations</td>
<td><strong>Introducing Dgroups:</strong> about Dgroups and role distinctions. <strong>Interview and role-play:</strong> Allow participants to introduce each other &amp; briefly state their expectations for the course, and roles within Dgroups</td>
</tr>
<tr>
<td>1000-1045</td>
<td>3. Different types of Dgroups: Case Studies</td>
<td><strong>Group Discussion:</strong> how are people using online forums? Other ways that Dgroups can be utilized</td>
</tr>
<tr>
<td>1045-1100</td>
<td>BREAK</td>
<td></td>
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<tr>
<td>1100-1200</td>
<td>4. Planning for an online discussion</td>
<td><strong>Planning:</strong> participants work in pairs. <strong>Group Discussion:</strong> reporting the plans back to the group</td>
</tr>
<tr>
<td>1200-1230</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>1230-230</td>
<td>5. Setting up your discussion using Dgroups</td>
<td><strong>Computer Work:</strong> Setting up a new Dgroup &amp; playing with the features. <strong>Feedback on setup process:</strong> discussing improvements that could be made to the setup process</td>
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DAY 2 – Administering Dgroups

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda</th>
<th>Details</th>
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<tbody>
<tr>
<td>930-1045</td>
<td>6. Administration Features of Dgroups</td>
<td><strong>Computer Work:</strong> how to manage the online features of Dgroups</td>
</tr>
<tr>
<td>1045-1100</td>
<td>BREAK</td>
<td></td>
</tr>
<tr>
<td>11-1200</td>
<td>8. Dgroups support system</td>
<td><strong>Computer Work:</strong> how to use Request Tracker. <strong>Discussion:</strong> feedback on support system</td>
</tr>
<tr>
<td>1200-100</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>100-230</td>
<td>7. Mailing Lists</td>
<td><strong>Mailing List management</strong></td>
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<td>230-245</td>
<td>BREAK</td>
<td></td>
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<tr>
<td>245-300</td>
<td>Key Points: description of support system</td>
<td></td>
</tr>
<tr>
<td>300-400</td>
<td>Computer Work: how to use Request Tracker</td>
<td></td>
</tr>
<tr>
<td>400-430</td>
<td>Discussion: feedback on support system</td>
<td></td>
</tr>
<tr>
<td>430-500</td>
<td>Extra Session</td>
<td><strong>Dgroups Open Source Version:</strong> Group discussion of features to include in an Open Source version of Dgroups</td>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
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<td>930-940</td>
<td>9. Getting the discussions started</td>
<td><strong>Key Points:</strong> instructor description of intro messages</td>
</tr>
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<td>940-1015</td>
<td>Composing Messages: work groups compose</td>
<td>messages</td>
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<tr>
<td>1015-1030</td>
<td><strong>BREAK</strong></td>
<td></td>
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<tr>
<td>1030-1100</td>
<td>Discussion &amp; Questions: reporting messages</td>
<td>back to the group, and feedback</td>
</tr>
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<td>1100-1110</td>
<td>10a. Facilitating discussions – Key Skills</td>
<td><strong>Key Skills:</strong> instructor description of key facilitation skills</td>
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<td>1110-1130</td>
<td>Strengthening Key Skills</td>
<td><strong>Strengthening Key Skills:</strong> group exercise</td>
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<td>1130-1200</td>
<td>Practicing Key Skills</td>
<td><strong>Practicing Key Skills:</strong> group exercise</td>
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<td>1200-100</td>
<td><strong>LUNCH</strong></td>
<td></td>
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<td>100-105</td>
<td>10b. Applying Key Skills</td>
<td><strong>Introduction:</strong> describe the group exercise</td>
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<td>130-215</td>
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<td>215-230</td>
<td><strong>BREAK</strong></td>
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<td>230-300</td>
<td>10c. Facilitator Guidelines</td>
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<td><strong>Group exercises</strong></td>
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<td>330-345</td>
<td>12. Reference materials</td>
<td><strong>Quick Overview</strong></td>
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<tr>
<td>345-400</td>
<td>13. Review</td>
<td>An <em>essential</em> part of the course; please leave time to conduct a review;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>students review their notes and the manual and select three things that they</td>
</tr>
<tr>
<td>400-430</td>
<td>14. Evaluation: To be Completed by</td>
<td>Participants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Very important; will generate ideas for improving the course</td>
</tr>
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Conventions Used in this Manual

Icons  The following icons appear in student’s manual. We included icons to draw attention to the text beside them and to give an immediate visual clue about the meaning of the material contained in the section.

This is a box with references to additional resources. The resources can be found in the Resource Section in the back of the Student Manual or at the ITrain Web site.

This for your information icon indicates additional information or resources for instructors and students.

This icon represents an exercise that participants are to complete.
1. Overview

Welcome to Facilitation for Dgroups Administrators. In this course you will learn how to setup, manage and facilitate online discussions using Dgroups.

This course will cover:

1. Planning for an online discussion or community
2. Setting up a new Dgroup
3. Administering Dgroups
4. The Dgroups support system
5. Facilitating online discussions
6. Evaluating the success of your discussions
7. Evaluating this course

In order to successfully complete the exercises, you will need to be familiar with Microsoft Windows or Linux, and a web browser (Mozilla, Netscape or Internet Explorer). If you do not meet these requirements, we have developed a computer handbook, which you can use to upgrade your skills.

This manual is a reference for your personal learning. Feel free to make notes on it. You can learn more about the ITrain Collective, of which this manual is a part, at http://www.bellanet.org/itrain.
2. Introduction and Expectations

**Objectives:** To get to know other participants at the workshop, and learn about experiences that others have had with Dgroups and online facilitation.

**Questions**

1. Please introduce, to the group, the person you interviewed. In a sentence or two, indicate what type of work he or she does.

2. What experience with Dgroups does the person you interviewed have?

3. What issues or questions does the person you interviewed expect to learn about Dgroups from this course?
3. Different types of Dgroups: Case Studies

Objectives: To gain an understanding of the different types of uses for Dgroups.

Dgroups is predominantly used by Civil Society Organizations and NGOs:

- to increase the awareness and intercultural exchange between teenagers worldwide through Global Teenager Project
- to collaborate on shared projects see Ifwin, European trade network
- for internal communication such as OneWorld-trustees
- for consultation CRIS campaign and WSIS preparations
- for external communication – such as the OneWorld South Asia partnership
- for discussion - see IS list
- for local and international knowledge sharing networks and South-South exchange
- to increase discussion between parliamentarians in the America (by ICA through FIPA’s Virtual Parliament project)

Example:

The current Communication Rights in the Information Society (CRIS) campaign is a strong, civil-society led initiative that uses a number of Dgroups to further their campaign; they provide a good example of a concrete application of Dgroups. They use Dgroups to:

- discuss strategy documents using the mailing list
- archive all documents related to the discussion for new members
- share events on the calendar
- distribute documents via the web to email function
- update on latest news relating to the group
- plan for the next fact-to-face meeting

According to the CRIS experience, workgroups tend to work best when 5 to 75 people have a clear project in mind and at least some of the members meet periodically. They also address the local needs (such as language needs and access to ICT tools) of each workgroup through the development of a variety of modular or individualized solutions.
4. How to help a community plan for an online discussion

Objective: To identify a systematic method for planning an effective online discussion. There are many important factors to consider when planning for an online discussion, and the more effective your planning, the more likely your discussions and online interactions will be valuable.

Who do you expect to participate in the discussions?

How well do the participants know each other?

What kind of buy-in do you have from the intended group of participants?

Based on participant feedback/demands:

What are the objectives, expected outcomes, and outputs?
How ready is your group? (Are they communicating already? How often do they interact? What communication tools are they currently using?)

Are there other similar groups? Other participants that might be interested in this discussion (either as a participant or guest)?

What other questions should you consider?
5. Setting up your discussion using Dgroups

NOTE: This section is for creators, however it is good for non-creators (administrators or facilitators) to also understand the process.

Why is there a Creator?
A creator ensures that all Dgroups are created properly; that an organization's quota is managed; and that the workload for creating new groups is distributed across partner and member organizations.

OBJECTIVES:
- How to set up and configure Dgroups to support your online discussion.
- Adding new members.

Exercise: Setting up a Dgroup

1. Go to http://www.dgroups.org
2. Click on My Groups
3. Enter your email address and password to login. (If you cannot remember your password, click on "Retrieve a Password" to have your password sent to you via email)
4. Click on “Create New Workspace”
5. Select the language(s) for the workspace (only the interface will appear in multiple languages – the content is only available in whatever language the participants use). Click on “next” to continue. (Hold down the control key to select more than one language. If you select more than one language, you will need to enter the following fields once for each language)
6. Enter the following information – explanations of each field are provided below, and a screen capture of the online form is provided on the following page.

Please select a Skin from the list
This will determine the look and feel of the workspace. You will be able to select from a few different skins; and you can change the skin at a later time. (The languages that you select will limit the available skins, as not all skins are available in all languages). See section 12(a) for more information on setting up a new skin. Note: not all skins support the calendar. If you want your group to have a calendar, ensure that your chosen skin supports it (such as the Dgroups generic skin).

Default language
This is the language that the interface will appear in when a participant first comes to the workspace. The Dgroups interface can be displayed in English, French, Spanish, or Portuguese. Only the languages that you selected in step 5 will be available here.

Short name
This is the name of the group that will be used for the URL and mailing list (example a short name of Dgroups-training would create a Dgroup at http://www.dgroups.org/groups/Dgroups-training (most new groups will be created under a subdirectory, such as groups/iicd/groupname) and create a mailing list of Dgroups-training@dgroups.org).

**Sector**
This is the sector focus of your group. You can select multiple sectors by holding down the control key.

**Region**
The region of the world that your group discussions apply to. Select from Global, Oceania, Africa, North America, Latin America, Asia-Pacific, Europe, or Middle East.

**Country**
The country (ies) of the owner of group, or which represents the main subject of your list.

**Keyword**
Enter keywords here to make it easier for others to find out about your group.

**Long name**
Used as part of the description displayed on the Dgroups main website, and for titles on your workspace.

**Short description**
Describe your group briefly, but with enough detail to help people understand the purpose of your group. This is an important item since this is the text that visitors will see beneath your group's listing

**Describe who can participate in this workspace**
This is used as part of the description displayed on the Dgroups main website.

**Lead Organization:** Enter the full name of the organization leading the discussion group.

**Please enter the text that you would like to have displayed on the front page of the workspace**
This text should describe the objectives and purpose of your Dgroup, including who can participate. A good description here will help participants to better understand why they would want to commit time to participating in this group.

**Who can view this workspace?**
This setting will determine if people have to register and be approved by you to view the space (only people I authorize), or if any visitor to Dgroups can view the site (if the site is open or closed to all Dgroups visitors).

**Who can contribute to this workspace?**
Describes who can send messages to the list, and contribute resources to the online space. If you select anyone, the people do not require authorization to join the list or submit new resources online. If you select “Only people I authorize”, then you will have to approve all participants before they can contribute messages or resources.

**List the workspace in Dgroups listings**
This setting will determine if your group appears in the master listing. If your group is closed or private, you can still select to list it in the Dgroups listing, as people cannot gain access without your approval. People are encouraged to list all Dgroups in the public listing to make it easier for development practitioners to see the range of activities being discussed, and connect with new colleagues through Dgroups. **Select “no” for testing spaces.**

**This is a testing workspace**
A testing workspace could be setup to try out some of the features of Dgroups. **During this exercise you are setting up a testing group, please ensure that this setting is set to “Yes” so that the space does not appear in the main Dgroups listing, and can be easily identified in the future when removing old testing spaces.**

**Allow members to announce new resources**
If set to yes, this feature allows participants the option of sending a notification to the mailing list when new resources are added to the workspace. **This setting will effect a later part of the course, and should be checked.**
You are creating a new workspace. All the fields below are required unless otherwise indicated:

**Step 1. Select a skin**

Please select a skin from the list:

Default Language:

**Step 2. Basic information**

Short Name (one word, used in URLs, mailing lists)

Sector

Region

Country

Keyword

**Step 3. Multilingual information**

Long Name (used in descriptions, titles, etc.)

English

Français

Short Description (one sentence)

English

Français

Describe who can participate in this workspace:

English

Français

Lead Organization

English

Français

Please enter the text you would like to have displayed on the front page of the workspace.

English

Français

**Step 4. Workspace parameters**

Who can view this workspace?

- Anybody
- Only people I authorize

Who can contribute to this workspace?

- Anybody
- Only people I authorize

List this workspace in Dgroups listings?

- Yes
- No

This is a testing workspace.

- Check

Allow members to announce new resources:

- Check

Create Workspace

---

Dgroups is a joint initiative of Bellanet, DFID, IUCN, ICAC, ICC, OneWorld, and UNAIDS.

Read about the terms of Copyright, Privacy, User agreements, Questions? Problems? Visit the Dgroups FAQ.
7. Click on the “Create Workspace” button at the bottom on the form once all fields have been filled in.

8. Click on the URL to visit your new workspace.

*Partners and members of Dgroups are entitled to setup their own Dgroups “skins” to customize the look of their online workspace. See section 12a in this manual for details on how to setup a new custom skin.*

9. Adding Participants:

   a) Click on the link to visit your new Dgroup

   b) Click on the “Participants” link (which may be labelled differently depending on the skin)

   c) Click on the “Add Participant” link

   d) Enter the email address of the participant you want to add
      a. If the participant already has a Dgroups profile you cannot change any of his/her information.
      b. If the participant does not have a Dgroups profile already, you must enter “First Name”, “Last Name”, “Password” and “Verify Password”

   e) If you want the new participant to have admin rights for your group, check the box next to the “Admin” field

   f) By default an automatic welcome message is sent to the participant. If you do not want to send one, select “no”.

   g) Click on “Submit” to add the new participant.

   h) Repeat steps a-g to add more participants.

** Each time you add a new participant, his/her profile should appear in the list of participants in the “Participants” section of your Dgroup.

10. Add some of the other workshop participants to your Dgroup. Visit some other groups and explore some of the features of Dgroups as a user.
6. Administration Features of Dgroups

a. Modifying Your Dgroup Configuration Settings

Exercise: Modifying Dgroup settings

Once your Dgroup is created, it is possible to modify basic parameters. To edit your Dgroup:

1. Log in to the Dgroups admin interface at www.dgroups.org/admin/. You will need to enter your username and password combination into the log in screen on this page.

   Once you log in, you should see a listing of various groups for which you are a member or administrator.

2. Click the link to the Dgroup for which you are an administrator. This logs you into the page with the HTML form containing the details of your Dgroup.

   The system lets you know that you are in the editing mode by displaying an alert to this effect at the top of the workspace form.
3. Change the introductory text and posting privileges on your site.

You will receive a message confirming that your editing has been successful and the changes have been updated. The Dgroups system will also offer a link back to the admin interface for carrying on with other tasks you may have in mind.

Workshop Edited Successfully

Return to edit your workspace.

4. After editing details of your group, visit the workspace to view the changes that you made. Invite others to visit your site and post messages using the new posting privileges rule.

**b. Managing Users**

(i) Adding Users

1. Log in to the Dgroups admin interface at [www.dgroups.org/admin/](http://www.dgroups.org/admin/)

2. Once logged in, click on the link to the dgroup for which you are an administrator. This will take you further into the admin interface for your dgroup.

3. Click again on the link titled "[group name] participants" at the top left hand corner of this page.

This brings you to the page where current participants in the group are listed.

4. Click on the "Add Participant" link on the right hand side of this page.
5. Type in the email address of the user in the text box that appears on the new page and then click on the button labelled "Next".

If the user you are adding is already a member of the Dgroups system, the next page that appears will show a HTML input form with all the user details pre-filled.

6. At the bottom of this input form, you will find a check box titled **Permissions** for giving administrator rights to the user you are adding. It is unchecked by default. If you wish to make the added user an administrator, check this box, otherwise leave the box unchecked to denote that this is a regular user.

7. Below the checkbox is the option to send a welcome message to the user saying they have been added to your dgroup. Check the button that says "yes". This helps to prepare new users for the messages that they will receive from your dgroup.

8. Click on the "Submit" button. This brings up the confirmation page that says the user has been successfully added to your dgroup.

9. Clicking on the link titled "return" takes you back to the page listing the participants, where you can see the new user you just added.
(ii) Removing Users

Users can remove themselves from your dgroup, or you can also do this.

1. As always, log in to the Dgroups admin interface at www.dgroups.org/admin/. If you are already logged in, click your way through to the page listing the participants of your dgroup.

2. Click on the **Delete Participants** link on the right hand side of this page.

This brings up a page displaying the names and email addresses of the dgroup's participants in a list.

3. Select the user you want to delete and hit the delete button below the list.

The Dgroups system returns a confirmation page notifying you that the removal was successful.

Click [here](#) to return to the Participants page.
4. Click on the link titled **here** to return once again to the participants page.

The participants page now reflects the removal of the user from the dgroup - the user's name cannot be seen anymore. The person’s profile will remain in the Dgroups system, but is no longer linked to your group.

(iii) Adding Additional Administrators

There are at least three situations in which it would make sense for a Dgroups to have more than one administrator:

- The organisation that initiates a dgroup (the lead organisation) may not have the skills or the time to perform the administrative tasks and may like to give this to another group.

- Many organisations may join to start one dgroup in partnership and may each like to have their representative as an administrator for the group.

- The sheer volume of discussion on a successful dgroup may necessitate having more than administrator for that group.

If you would like to grant administrator rights to an existing member of your Dgroup:

1. While being logged into your dgroup, visit the Participants section.

2. Click on the participant for which you would like to grant administrator rights and click **Edit Profile** on the top left.

3. Check the checkbox under **Permissions** titled **Admin**, then click **Submit**.

**NOTE:** To protect the privacy rights of participants, you cannot edit profile information (i.e. the text **Edit Profile** is misleading), you can only edit administration rights setting.
c. Managing Resources

Dgroups provides capabilities to add, edit, delete and categorize resources. There are three types of resources which Dgroups handles: documents, links, and news. Once your resource is added, it will appear at the top in the Recent Resource section on the homepage of your Dgroup.

Who can ADD resources?
- As the administrator, you can always add resources.
- Members of your Dgroup can also add resources.
- Non-members of your group cannot add resources if you had specified “Only people I authorize” to the configuration setting “Who can contribute to this workspace?” Non-members can add resources if you had specified “Anybody” to the configuration setting. However, non-members must be logged into the Dgroups system (i.e. they must be a member of at least a Dgroup) before making a contribution.

Who can EDIT resources?
- As the administrator, you can edit any resource (after editing a resource, the original submitter’s name will remain associated with the resource).
- Members and non-members of your Dgroup can only edit the resources that they had previously submitted.

Who can DELETE resources?
- As the administrator, you can delete any resource.
- Members and non-members of your Dgroup can only delete the resources that they had previously submitted.

(i) DOCUMENTS: Documents of any type can be uploaded and shared as part of your Dgroup. We recommend that you upload files that are in common or accessible file formats. Dgroups also provides the ability to view documents in proprietary formats online if the user does not have the correct program to view the file.

ADDING Documents:

1. Log in to the dgroup to which you want to add a document by entering your username and password details in the login screen.
2. On entering the dgroup, look for the "Add Document" link in the "Recent Resources" section:

Clicking on this link brings up the form for adding documents:

- **Title**: Enter a title for the document that you are adding.
- **Description**: Briefly describe the document and its contents for the benefit of other group members.
- **Filename**: Click on the button next to this field, locate the document on your computer, select it, click on Open.
- **URL**: If there is a URL where the document can also be found or a URL related to the document, provide it here.
- **Language**: The language of the document.
- **Display user name with resource**: Whether or not the submitter’s name will appear with the listing of the resource.
- **Send notification to the group members**: This option appears when ‘Allow members to announce new resources’ is checked in your Dgroups basic settings. If ‘Yes’ is chosen here, then the members of the group will receive a notification that a new document has been added. This notification also includes explanation of how to access this document via email (no need to visit the web interface).

3. Fill out the online form and click on “Submit” to add the document.

**EDITING Documents:**

1. Log in to the dgroup in which you would like to edit a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to edit, look for the "edit” link in the resource’s title bar on the top right.

Clicking on this link brings up the form for editing documents:
DELETING Documents:

1. Log in to the dgroup in which you would like to delete a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to delete, look for the "delete" link in the resource’s title bar on the top right.

3. You will then be prompted to confirm your deletion before the deletion occurs.

(ii) LINKS: Web links or URLs to resources available online.

ADDING Links:

1. Log in to the dgroup to which you want to add a link by entering your username and password details in the login screen.

2. On entering the dgroup, look for the "Add Link" link in the "Recent Resources" section:

Clicking on this link brings up the form for adding links:
3. Fill out the online form and click on “Submit" to add the link.

EDITING Links:

1. Log in to the dgroup in which you would like to edit a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to edit, look for the "edit" link in the resource’s title bar on the top right.

Clicking on this link brings up the form for editing links:

<table>
<thead>
<tr>
<th>Edit Panbazuka News</th>
<th>Add Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td></td>
</tr>
<tr>
<td>Panbazuka News</td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td></td>
</tr>
<tr>
<td>Panbazuka News is a news website covering news, commerce, and culture. It offers a comprehensive range of other resources.</td>
<td></td>
</tr>
<tr>
<td><strong>URL:</strong></td>
<td></td>
</tr>
<tr>
<td><a href="http://www.panbazuka.com">http://www.panbazuka.com</a></td>
<td></td>
</tr>
<tr>
<td><strong>Language:</strong></td>
<td></td>
</tr>
<tr>
<td>English</td>
<td></td>
</tr>
<tr>
<td>Display user name with resource:</td>
<td></td>
</tr>
<tr>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td><strong>Move To:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Title:** Enter a title for the link that you are adding.

**Description:** Briefly describe the link and its contents for the benefit of other group members.

**URL:** The link of interest to the group and/or relevant to the discussion.

**Language:** The language of the URL’s content.

**Display user name with resource:** Whether or not the submitter’s name will appear with the listing of the resource.

**Send notification to the group members:** This option appears when ‘Allow members to announce new resources’ is checked in your Dgroups basic settings. If ‘Yes’ is chosen here, then the members of the group will receive a notification that a new link has been added.
3. Click on the "submit" button to finish editing the links.

**DELETING Links:**

1. Log in to the dgroup in which you would like to delete a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to delete, look for the "delete" link in the resource's title bar on the top right.

3. You will then be prompted to confirm your deletion before the deletion occurs.

**(iii) NEWS:** Bits of significant news relevant to your discussion.

**ADDING News:**

1. Log in to the dgroup to which you want to add a news item by entering your username and password details in the login screen.

2. On entering the dgroup, look for the "Add News" link in the "Recent Resources" section:

   ![Add Document | Add Link | Add News](image)

Clicking on this link brings up the form for adding news:
3. Fill out the online form and click on "Submit" to add the news.

EDITING News:

1. Log in to the dgroup in which you would like to edit a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to edit, look for the "edit" link in the resource’s title bar on the top right.

Clicking on this link brings up the form for editing news:
3. Click on the “submit” button to finish editing the news.

DELETING News:

1. Log in to the dgroup in which you would like to delete a resource by entering your username and password details in the login screen.

2. Click to locate the resource whose details you wish to delete, look for the "delete" link in the resource’s title bar on the top right.

3. You will then be prompted to confirm your deletion before the deletion occurs.

d. Categories

1. Log in to the Dgroups admin interface at www.dgroups.org/admin/ (only the admins can manipulate categories).

2. Once logged in, click on the link to the dgroup for which you are an administrator. This will take you further into the admin interface for your dgroup.

3. Click again on the link titled "[group name] Resources" under the Subsections heading of the left menu bar.
On the following screen, you will find a listing of existing subcategories as well as resources previously added to your Dgroup.

**To Add a Category:**

Like your files on your computer, you can create folders (categories) within other folders (categories) or at the top-level. It is possible to do the same within your Dgroup to better categorize your Dgroup’s resources.

4. In the screen where you are viewing existing subcategories and resources, view the category in which you would like to add a new category. You can know which category you are viewing by reading the top navigational aide.

Example:

```
[Category 1 1]
```

The format is [Dgroup Name] > [Dgroup Name] Resources > Category Name > Category Name > ... etc.

So, from the above image it is known that you are within the ‘Category 1 1’ category.

5. Once you are viewing the category in which you would like to add a new category, click on [ add ] under ‘Subsections: Categories:’

You will be presented with the ‘Add New Category’ form:
Add New Category as a subcategory of AiD/

1. Category Setup:
   - Category Name: Enter a clear but short name for the category.
   - Category Text: (optional)
     - English

2. Information Associated with Category: (optional)
   - Enable Comments: Check this if you wish to allow your dgroup users to post comments on the resources that will be contained within this category.
   - Resources: Here you can select which types of resources you wish this category to contain (it is a good idea to select all types).

Note: If your dgroup supports more than 1 language, then you will have the ability to enter the category name and description for each language.

**Category Name:** Enter a clear but short name for the category.

**Category Text:** If you feel a description of the category is necessary, enter it here.

**Enable Comments:** Check this if you wish to allow your dgroup users to post comments on the resources that will be contained within this category.

**Resources:** Here you can select which types of resources you wish this category to contain (it is a good idea to select all types).

6. Fill out the form, and click on “Submit” to add the new category.

**To Edit a Category:**

1. While viewing the category you wish to edit (see description on how to locate a category at the beginning of the section on ‘How to Add a Category’, click on [ edit ] under ‘Subsections: Categories:’

You will be presented with the ‘Edit Category Details’ form:
2. Modify the information in the form, and click on “Submit” to make the changes.

To Delete a Category:

1. While viewing the category you wish to delete (see description on how to locate a category at the beginning of the section on ‘How to Add a Category’), click on [ delete ] under ‘Subsections: Categories’:

2. You will then be prompted to confirm not only the deletion of the category, but of all resources contained within the category as well. Be careful! Remember to change the location of the resources contained within it before deleting a category. This can be done by editing the resource details (as previously described).

e. Calendar

Viewing: In the Calendar application, you can view events in the month view or you can view a listing of upcoming events.

Month view: This is the default view. You can also attain this view by clicking on ‘Show Calendar’ in the top calendar menu.
Upcoming Events: You can attain this view by clicking ‘Upcoming Events’ in the top calendar menu.

<table>
<thead>
<tr>
<th>Title:</th>
<th>Starts:</th>
<th>Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICT Roundtable workshop: Agricultural Sector, Mali</td>
<td>Jan. 12, 2004</td>
<td>Ségou</td>
</tr>
</tbody>
</table>

Clicking on the event titles in either view brings you to a listing of the full event details:

**Event**

Title: Connectivity Africa Steering Committee Meeting

Date: Dec. 8, 2003

Location: Hotel

Country: Switzerland

Type: Workshop (private)

Topic: Information, Knowledge and Communication

Contact Info: Steve Song

Description

Entered by: Steve Song ssong@idrc.ca

Adding an Event to the Calendar:

To add an event, simply click ‘Add an Event’ from the top calendar menu.
Add an Event

*Field labels in red denote a required field.

**Event Title:** A short title for your event.

**Event Type:** Choose a type for your event.

**Event Topic:** Choose a topic for your event.

**Location:** Briefly describe the location of the event.

**Country:** Choose the country for your event.

**Region:** Choose the region for your event.

**Start and End Date:** Specify the start and end date for your event.

**Cost:** If there is a fee for your event, specify it here.

**Contact:** Specify who the interested participants should contact for more information.

**URL:** Specify the URL of your event if it is available.

**Organizer:** This could be a group, organisation or individual responsible for organising the event.

**Description:** This should give sufficient detail for the potential participants to know the nature of your event.

---

**Editing a Calendar Event**

Unfortunately, only users who originally entered the calendar event can edit it (the event description will indicate who entered the event). Dgroup administrators cannot edit an event not originally entered by themselves.

While viewing an event which you originally entered, an ‘Edit’ button will appear at the bottom of the page. Click it and see the same form as you used for adding the event, but with your past information available in the editable fields. Edit your information and click ‘Save’.

**Deleting a Calendar Event**

Only users who originally entered the calendar event can delete it.

While viewing an event you originally entered, a ‘Delete’ button will appear at the bottom of the page. Click “delete” and confirm your deletion.
7. Mailing Lists

At the core of every Dgroup is a mailing list. Dgroups currently uses the Lyris mailing list software.

a. Subscriber list settings

Dgroups participants can modify their email settings so that they (a) receive messages as they are posted to the list; (b) receive a daily digest of all messages sent to the list over a day; (c) do not receive any messages sent to the list, but remain a member of the list. To modify email settings:

A participant should send an email message to lyris@dgroups.org from his/her own email account, with the following in the body of the message:

To receive a daily digest (receive all the daily messages in one email):

Send an email to lyris@dgroups.org with set listname digest in the body of your message (replace 'listname' by the name of your mailing list).

To receive a daily MIME digest (receive all the daily messages in one email in MIME format in which each message is received as an attachment to the email):

Send an email to lyris@dgroups.org with set listname mime digest in the body of your message (replace 'listname' by the name of your mailing list).

To receive a daily index (receive a daily index of the subject lines of the messages of the day -- you can then request specific messages or view them in the Dgroups messages interface):

Send an email to lyris@dgroups.org with set listname index in the body of your message (replace 'listname' by the name of your mailing list).

To receive no mail from a Dgroups list (don't receive list contributions to your email address -- you can view messages with the Dgroups messages interface):

Send an email to lyris@dgroups.org with set listname nomail in the body of your message (replace 'listname' by the name of your mailing list).

To receive all messages from a Dgroup list as they are contributed (which is the default setting for all lists):

Send an email to lyris@dgroups.org with set listname mail in the body of your message (replace 'listname' by the name of your mailing list).
b. List moderation settings
This section will help you to change mailing list settings so that you can moderate list messages.

**NOTE:** Do not modify any other list settings, as this might prevent the mailing list from operating properly.

1. Go to your Dgroup main page, and login (you must have administrator rights to the group).

2. Next to the “Recent Messages to listname” there is a link for Options. Click on the Options link, which opens a new window (see picture below) for the Lyris mailing list management. (If you do not see the options link, you are not logged in with an account that has administrator rights to that group).

3. Click on the “Click here to enter listname” button.

4. Click on the “List Admin” button.

5. Click on the “List Info” button, which will display a long form for modifying the mailing list settings. Scroll down to the section “Posting Privileges and Moderation” – see picture below. **Note:** do not modify any other settings on this page, as the list may not function properly.
6. In the “Posting Privileges and Moderation” section you can modify the following features:

**Admin Send:** When set to yes, only List Administrators are allowed to contribute messages to the mailing list. Any member who attempts to contribute a message will have their contribution automatically rejected. The Admin Send feature is useful for announcement type mailing lists, where a select group is allowed to post to the list, but where all other members should not be allowed to post to the list.

**Password Required:** This option determines whether list postings contributed by email require the sender to put their personal password in the message body. If certain members do not have passwords, this option will not have any effect on their ability to post messages to the list. Passwords will not be required of them for their mail to be distributed to the list. Passwords will only be required for members who have passwords. If you want all members to have passwords, and for their passwords to be required in all list postings, you should also set "Require Password" to be true. "Require Password" (as distinct from "Password Required") requires that all members have passwords. The "Password Required" setting is found in the "Security for Subscribers" section of the List Configuration settings.

**Moderated:** Not moderated means that message contributions from mailing list members will be automatically approved and be automatically distributed to the mailing list. All messages means that message contributions from mailing list members will be held for approval by a list administrator before being distributed to the mailing list. Number of messages means that new members must have their first few message contributions approved. Thereafter, they will be able to contribute messages without needing approval. The number of approvals new members need, is set by the next field Approve #. If the Moderated setting is changed to number of messages after the list is created and people have joined, only the members who join after the change will be subjected to number of messages moderating. The pre-existing members will be considered as having passed their initial approval requirements. If the Moderated setting is changed from number of messages to another setting, the new setting will apply and members who still had a number of messages to be approved will instead be held to the new Moderated setting.

**Approve #:** If number moderated, how many approvals before can post unapproved? This sets the number of approvals needed for each new member who joins.
**Approve #**: If the *Moderated* setting is for *number of messages*, defines the number of message contributions that new members need to have approved before they can contribute without being held for approval. If the *Moderated* setting is not set for *number of messages* this field has no effect.

7. Modify the “Moderated” mailing list setting to “All Messages”.

8. Invite other participants to send a message to your group.

c. **Moderating messages online**

1. Go to your Dgroup main page, and login (you must have administrator rights to the group).

2. Next to the “Recent Messages to listname” are links for New Message and Options. Click on the Options link, which opens a new window for the Lyris mailing list management. (if you do not see the options link, you are not logged in with an account that has administrator rights to that group).

3. Click on the “Click here to enter listname” button.

4. Click on the “List Admin” button.

5. Click on the “Moderate” button.

A list of any messages requiring moderation will appear on the page.

6. Select a message from the list, and click on “View Message” to read the message. You can edit the message by clicking on the “Edit Message” button (WARNING: if you edit the message, do not change any of the characters in the “Header” section as this will cause an error).

7. Click on either “Approve” or “Reject”.

For further help using the Lyris mailing list software, please visit [http://www.lyris.com/lm_help/5.0/](http://www.lyris.com/lm_help/5.0/)

**NOTE**: By default all Dgroups have a mailing list limit of 200KB. This means that any message larger than 200KB will be automatically rejected and returned to the original sender.
8. The Proposed Dgroups Support System

Proposed Dgroups Technical Support Structure

1. Who is requesting support?

**Visitors/Browsers**: These are infrequent visitors to the Dgroups system who are not members of any workspaces, but are visiting for any number of reasons (ex: may want to know more about the Dgroups platform itself, may view/participate in open workspaces, etc.)

**Participants/Users**: These are workspace members, those who interact with the system in a regular non-administrative role.

**Administrators**: These are the individuals who administrate one or more workspaces. They have the responsibility to ensure the proper functionality and effective use of their responsible workspace(s).

**Champions and Head-Creators**: These are Dgroups “champions” from partner or member organizations and head-creators who are the principle workspace creators and technical contact persons, there is one such designated person at each partner and member organisation. Creators in general are responsible for the proper functionality and effective use of the workspaces which they have created, but the head-creator is responsible for handling of problems/questions from the additional creators (sub-creators) belonging to their organisations.

**Sub-Creators**: These are additional creators within partner or member organisations who are responsible for the proper functionality and effective use of the workspaces which they have created.

2. Who is providing support?

**Participants**: (as described above) Participants can provide support to each other (such as through the Users List – described below).

**Administrators**: (as described above). Note: whenever a group is created, the administrator is automatically subscribed to an administrator’s list, which is currently used as a broadcast list for technical announcements.

**Champions/Head-Creators**: (as described above)

**Sub-Creators**: (as described above)

**Bellanet Technical Team**: These are individuals responsible for Dgroups general technical support. They are responsible for: bugs in the Dgroups internal system or one of its components (Lyris, skins, calendar, etc.); new feature development; skin development.

**Project Coordinators**: Introduce new partners/members to the system and coordinate governance activities.
3. What are the different types of support requests?

Common “how-to” or basic questions, those that could be answered by seeking the documentation/knowledge base (as described below).

a) Technical
b) Non-technical

System errors or abnormalities:

a) Urgent, defined as:
- Server failure
- Whole site unobtainable
- An essential page (such as the home page) being unobtainable
- Core modules/functionality not working for ALL workspaces: unable to send/receive messages through the Lyris Mailing List Manager; unable to add/edit/delete documents/links/news; unable to add/edit/delete calendar items; unable to add/edit/delete participants; unable to create workspaces
b) Non-urgent, defined as:
- Errors on a page
- Individual pages unobtainable

Feature requests, either a request for a new feature or request for a modification to an existing feature.

Skin requests, either a request for a new skin or request for a modification to an existing skin.

4. What are the tools and means for support?

Documentation/Knowledge Base: This is the FAQ, training materials, help manuals, administrators list archives, etc. This should all be found linked from one central help location. A knowledge base could be developed as more problem/solution combinations are documented.

Peer Support Lists:
Three such lists were identified to be used by those requesting support and building their knowledge of Dgroups. They are to be forums where users can learn from their peers, and use the list archives as an easily searchable knowledge base. The 2 lists are:

Administrators Lists (one for each of English, French, Spanish, Portuguese): This is to be used primarily by Administrators. Ideally Creators/Champions, Tech Team, and Project Coordinators would also be on this list (see Fig 1) in the language of their choice. Creators/Champions, Tech Team, and Project Coordinators may or may not respond to questions posted on this list.

Partners List: This is to be used by Creators/Champions. Tech Team and Project Coordinators are also on this list (see Fig 1). Tech Team and Project Coordinators may or may not respond to support questions posted on this list.
Request Tracker (RT): This is a task management system used to report bugs, feature requests and skin requests by the Creators/Champions, Tech Team and Project Coordinators. Requests for support enter the system by sending an email to support@dgroups.org or by entering them into the web interface (http://support.dgroups.org). Creators/Champions, Tech Team, and the Project Coordinators interact with this system.

Initially, prioritization and assignment of tasks within the system is done on a weekly basis by the Dgroups Technical Team for a trial period of 6 weeks until more clear prioritization criteria can be established.

5. Who should provide what type of support to what type of user?

To initially generalize these scenarios, the common flow of a question is from Participant to Administrator, from Administrator to Sub-Creator, from Sub-Creator to Head-Creator/Champion, then from Creator/Champion to Tech Team and/or Project Coordinators.

A response time of 2 days (excluding weekends/holidays) for Administrators, Creators/Champions is suggested when responding to individual questions from Participants/Users (response by Administrators) and Administrators (response by Creators (Head or Sub)/Champions). Response to requests posted in the task queuing system (Request Tracker) is based on the urgency. If urgent (based on stated criteria), then response should be within 1 day otherwise response is dependent of amount of time available for support in the given month.

This section attempts to go through all scenarios based on what was identified in sections 1-4.
6.1 Common “how-to” or basic questions
The following applies for both technical and non-technical questions:

System errors or abnormalities

6.1 Non-Urgent
The scenario is the same as that in 5.1.

Urgent

Requester: Visitor
The is the same as that presented for the Visitor requester in 5.1 with the assumption that visitors will not always be able to discern an urgent from a non-urgent system error or abnormality due to their level of familiarity with the system.

Requester: Participant, Administrator, Sub-Creator, Champion/Head-Creator
6.2 Feature requests

**Requester:** Visitor
It is assumed that Visitors are not familiar enough with the system to be in a situation to request a feature they believe is missing, so this case is not handled.

**Requester:** Participant, Administrator, Creator/Champion

- **Administrator**
  - Request is "filtered" – if Administrator believes urgent, then notifies Creator (which could be a sub or head creator)
  - Notifies Administrator

- **Sub-Creator**
  - A phone call to a Project Coordinator may follow, based on the level of urgency
  - Request is "filtered" – if Sub-Creator believes it is urgent, then notifies Head-Creator

- **Head-Creator**
  - Request is "filtered" – if Head-Creator believes urgent, then submits into Request Tracker
  - Request Tracker

- **Partners List**
  - If the Dgroups Partnership decides that this feature should be implemented, then it is placed in the task queue to be completed by Tech Team

6.3 Skin requests

**Requester:** Visitors, Participants, and Administrators
These users are unable to request skins or modifications to skins, so these cases are not handled.
**Requester:** Sub-Creators, Champions/Head-Creators

These cases will be handled based on the assigned “quota” for requesting partner or member organizations, and the urgency of the problem.
Using Request Tracker

Dgroups uses a request tracker software to track any problems or requests for change with Dgroups. Any issues should be reported using the Request Tracker (RT) tool, which can be found at: [http://support.dgroups.org/](http://support.dgroups.org/)

1. What is Request Tracker?

Request Tracker is the system that Dgroups has adopted to manage support requests. A support request, as Dgroups define it, can be one of four things:

   a. Reporting an urgent or non-urgent system error or abnormality.
   b. Question, either about how the Dgroups system works, Dgroups features, or questions about list facilitation, or just a general Dgroups-related question.
   c. New Dgroups feature/functionality request.
   d. Skin request, either for a new skin or a modification to an existing skin.

2. Who can use RT? Where is RT?

Two individuals from each Dgroups partner and member organisations, the Dgroups "champion" and "head-creator" (see section above) are granted the rights to use Request Tracker.

Dgroups Support Request Tracker is located at [http://support.dgroups.org/](http://support.dgroups.org/). From there, enter your username and password that was given to you.

You can also supply information to the system through email (more information in How do I make a support request through the Request Tracker system?). The email address of Dgroups Support Request Tracker is support@dgroups.org

3. How do I make a support request through the Request Tracker system?

Making a support request in RT equates to creating a "ticket". There are 2 ways to submit a support request: You can create a ticket via the Web interface or sending a message to support@dgroups.org.

3.1 Submitting a Support Request Through the Web Interface

After you login, click on "New ticket in". The next page will be the "Create a new ticket" page (see pic 1)
In this screen, input the following information:

**Requesters**  This is yourself by default, you are the individual making the request. If you are making this request on behalf of yourself and someone else, enter their email address here as well.

**Cc**  As with an email, these are the individuals who are interested in following how the support request progresses. These individuals will receive updated information as it is added until the request is fully handled.

**Admin Cc**  Enter nothing here -- these are the individuals who have administrative rights and who are also following the progress of the request.

**Subject**  A short description of your request.
Request Type

You need to choose ONE type from the following choices:

1. **non-urgent error**: Non-urgent system error or abnormality:
   - errors on a page
   - individual pages unobtainable

2. **urgent error**: Urgent system error or abnormality:
   - server failure
   - whole site unobtainable
   - an essential page (such as the home page) being unobtainable
   - core modules/functionality not working for ALL workspaces: unable to send/receive messages through the Lyris Mailing List Manager; unable to add/edit/delete documents/links/news; unable to add/edit/delete calendar items; unable to add/edit/delete participants; unable to create workspaces

3. **general question**: Technical and non-technical general or how-to questions which are not answered in the Dgroups documentation.

4. **skin request**: Either a request for a new skin or a request for a modification to an existing skin.

5. **feature request**: Either a request for a new feature or a request for a modification to an existing feature.

---

### Attach file

If you feel it would be useful to attach a file (such as a screen capture of how you see the error), please do so here.

### Describe the issue below

Provide us with sufficient detail to respond to your request. In the case that it is either a non-urgent or urgent error, please additional supply the following 5 pieces of information:

1. the date and time you encountered the error (so that the error log can be consulted)
2. the URL of the page you were visiting when you encountered the error
3. what action you took which caused the error
4. if you inputted any form values, please list the fields and the values
5. what operating system and web browser are you using

After filling in above information, click on the "Create" button to submit the request.

---

**3.2 Submitting a Support Request Through Email**

You can also create a ticket by sending a message to support@dgroups.org. This is very similar to supplying the same information through the web interface. The only disadvantage here is that you cannot supply your Request Type. Note that the RT system only receive requests via email from authorized RT users. Message sent from non-authorized user will be rejected.

---

**3.3 Received Request (through web interface or email)**

Once RT system receives your request (either through the web interface or through email, the system will send a confirmation to the requester(s) (yourself and any other email addresses you entered) which contains a ticket number and content of that ticket. Requester should keep the confirmation message for future reference. Once a ticket is created, Dgroups support team will receive a notification of the
ticket, and then an owner of the ticket will be assigned. The owner is the person responsible for resolving the problem.

3. How can I search for and view an existing ticket?

Once you are logged into RT, you will see "RT at a glance" screen (see pic 2). Click on "Dgroups" under "Quick Search".

(Pic 2)

It will lead you to next screen where it lists all tickets sorted by ticket number (see pic 3) under "Dgroup".
If you are not searching for a specific ticket (based on its number), you can search for a ticket under "Refine search". The search can be based on ticket owner, email address, subject, priority, attachment, status, and Request Type.

4. How can I add additional information to a ticket after it has been created?

You can add additional information by replying to a ticket. When viewing the ticket, click "Reply" in the upper right of the page. To quote the text of an existing reply, click Reply to an existing reply, from within the ticket's History. After the reply is submitted, the Requester(s) and Dgroups support team will get a copy of that reply via email. You can also reply to a ticket by email, find out the confirmation message you got when you create the ticket, reply that message and it will be displayed under "reply" section in RT web interface.

5. Can I delete a ticket?

Once a ticket is created, you can not delete it. If you want to provide a notification that the problem/question is now resolved, then provide a reply to the ticket.
9. Getting the discussions started

Objectives: Composing effective welcome & introductory messages to get your group discussions started.

To be prepared to start a new discussion group, it’s recommended that you compose a few introductory messages to send once everyone is subscribed.

Exercise: Composing initial messages

1. Compose a message inviting people to participate in your discussion. Indicate the general focus of the discussion, when the discussions will start, and how to join the discussions, etc.

2. Compose a welcome message to introduce the list, its purpose, objectives, and any intended outcomes. Include instructions on how to use the list (note that the reply-to function addresses messages to the list when someone hits reply to a message), and any ground rules for the list.

3. Get the discussion going by inviting participants to introduce themselves, and starting with some basic issues for the group to discuss.
10. Facilitating Discussions

**OBJECTIVES:** Clarify the role of a facilitator and begin to develop the skills necessary for effective facilitation.

One of the most important factors for the success of a community is the strength of its leadership. Effective facilitators, or community coordinators, are able to dedicate a significant portion of their time and expertise in performing a number of key functions.

A facilitator helps a group function effectively by playing these **key roles**:

- Clarifies and reinforces the purpose of the community.
- Keeps the discussion focused.
- Ensures that everyone has a chance to participate.
- Helps to ensure understanding.
- Is an impartial participant in discussions.

**a. Key Skills**

There are four critical facilitation skills that should be used by the facilitator to help groups work together effectively. These include **asking questions**, **paraphrasing**, **summarizing** and **encouraging participation**. These skills are also very useful if you are facilitating discussions in a face-to-face environment.

**Asking Questions:**
Paraphrasing:

Summarizing:

Encouraging:
Exercise – Strengthening Key Facilitation Skills

Practice using the facilitation skills by asking questions, paraphrasing, summarizing and using encouraging behaviours while a story is being told. What do you notice about using the skills? What does it take to do it well?

**Asking Questions:**


**Paraphrasing:**


**Summarizing:**


**Encouraging:**
Exercise: Practicing Key Facilitation Skills

**Task:** Reach consensus on a plan for a dinner party in 10 minutes.

**Role of Facilitator:** Use the skills of open-ended questions, paraphrasing and summarizing as well as other techniques to get the group to reach consensus on a plan for a dinner party. (Time - 10mins).

**Role of Group Members:** Using the Role Card, participate accordingly in the task.

**Observer’s Role:** You will be asked to provide feedback on the facilitator’s ability to involve the participants, ask open-ended questions, and paraphrase and summarize the discussion.

What facilitation skills helped most? Why?
b. Applying Key Skills to Virtual Scenarios

Exercise: Hands-On Facilitation

You are the facilitator of an online community of poverty alleviation projects in Africa called PAOCA (Poverty Alleviation Online Community for Africa). The same donor funds all projects. The donor has provided resources for each project to participate in the online community and for the time spent by the facilitator. The goal of the online community is to improve the quality of the poverty-alleviation projects through the speedier diffusion of learning and experiences across them.

The members of the online community are using a Dgroup. The group is called “paoca”. The Dgroup has been in existence for a year and has approximately 150 members. Recently, some projects have been approved by the donor, resulting in 15 new members in the online community.

Members of the list include project managers, representatives of line agencies in recipient countries and representatives of the funding agency.

The following scenarios are described:

1. Building Identity
2. Message Overload
3. Inactivity in the Discussions
4. Resolving Conflict
5. Authoritarian Experts
6. Long, Complex Messages
7. Consistently, Off-topic messages
8. Cultural and Gender Conflict
9. Power Relations
1. Scenario: Building Identity

Fifteen new members have recently joined the discussion. You recognize that knowledge flow is in large part determined by trust and how well people know each other.

*In your role as facilitator, what steps do you take to help the new members develop a sense of trust in and belonging to the online community? Compose your answer in the form of an email.*
2. Scenario: Message Overload

List activity has recently risen dramatically. From a norm of about 12 messages per week, message activity has risen to about 12 messages per day. Several factors account for this. The donor has recently announced new reporting requirements, which have stimulated discussion amongst the participants. At the same time, members are preparing online for a knowledge-sharing workshop in Harare. The combination of these two things has produced a dramatic increase in messages.

As the facilitator you have received private messages from several members complaining that they find it hard to keep up. One has even publicly asked to be removed from the list.

In your role as facilitator, what do you do? Compose your answer in the form of an email.
3. Scenario: Inactivity on the List

It’s been three weeks and no one has posted a message to the list.

In your role as facilitator, what do you do? Compose your answer in the form of an email.
4. Scenario: Resolving Conflict

Two recognized experts are arguing on the PAOCA Dgroup. Their arguments are interesting and cogent but not free of personal invective.

To: PAOCA <paoca-cl@lyris.bellanet.org>
From: Cyril Ubuntu <cyril@people.net>
Date: 12/12/2002
Subject: Project management skills

It has come to my attention that many of the project managers implementing United Funding Agency’s projects are lacking in the skills needed to use core project management tools such as MS Project. In my opinion, all project managers should be able to demonstrate capacity in the use of project management software before being given responsibility for a project.

~Cyril

----------
Cyril Ubuntu <cyril@people.net>
Project Manager
Southern Africa – Poverty Alleviation Project

To: PAOCA <paoca-cl@lyris.bellanet.org>
From: Patricia Uhuru <puhuru@freedom.net>
Date: 13/12/2002
Subject: Re: Project management skills

Dear Cyril,

I object to your prescriptive approach. You always think that software is the solution to everyone’s problems. In my 20 years of experience, I have successfully managed dozens of projects without the “benefit” of project management software. In many cases, projects have software IMPOSED UPON THEM. This only detracts from the project manager’s time, which could be more usefully spent directly engaging with poor communities.

~Patricia

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Patricia Uhuru <puhuru@freedom.net>
Project Manager
Eastern Africa – Poverty Alleviation Project
In your role as facilitator, what do you do? Compose your answer in the form of an email.
5. Scenario: Authoritarian Experts

A new member, in one of her first messages to the list, mentions a recently published work that she has found useful and interesting. A long-time member of the list and recognized expert dismisses the work and by implication, the new member.

To: PAOCA <paoca-l@lyris.bellanet.org>
From: Emmanuel Mafuna
Date: 12/12/2002
Subject: Interesting paper

Greetings,

I thought that some of you might be interested in a paper that I recently discovered in the African Journal of Poverty Alleviation. John Smith of the University of Wallamaloo writes that the next generation of micro-credit lending institutions will transform the face of lending in Africa over the next decade.

Perhaps this indicates that we should be investing more in micro-credit institutions as part of our poverty alleviation strategy.

Looking forward to hearing your views.

All the best,

Emmanuel

Emmanuel Mafuna <emafuna@funder.net>
Research Assistant
United Funding Agency

To: PAOCA <paoca-l@lyris.bellanet.org>
From: Cyril Ubuntu <cyril@people.net>
Date: 12/12/2002
Subject: Project management skills

Dear Emmanuel,

John Smith is hardly a respected member of the academic community. His ideas have long since been discredited in most academic circles. In my most recent paper, systematically disprove his arguments. Most respected researchers have little time for his theories.

You might spend your time more productively investigating some of my papers at http://www.pedantic.net/~cyril.

-Cyril

Cyril Ubuntu <cyril@people.net>
Project Manager
Southern Africa - Poverty Alleviation Project

In your role as facilitator, what do you do? Compose your answer in the form of an email.
6. Scenario: Long Complex Message

A list member posts a very long and seemingly complex message that nobody responds to. Obviously a lot of thought went into the message but either for reasons of length or complexity or both, members have not responded.

To: PAOCA <paoca-cl@lyris.bellanet.org>  
From: Patricia Uhuru <puhuru@freedom.net>  
Date: 14/12/2002  
Subject: Impact Assessment Rating

Dear PAOCA members,

The twin objectives of any micro-finance institution are to be financially viable, and to maximize the access of its services to the poor. While it is a difficult juggling act to be able to reach the poorest of the poor and remain financially sustainable, it is, nonetheless, the poor that make up the clientele and provide for the successes of the industry. Therefore, those MFI that can plan for and maintain a high level of access while applying sound financial and managerial practices are likely to succeed. What is required is a means of showing how effective their operations are at raising the living standards of their customers, especially among the most impoverished.

The information required for such a task would need to take into account how well the MFI contributes to their clientele's ability to:

Increase, stabilize and diversify their revenues;  
Ensure basic goods and services, foods and medicines among others for their households;  
Improve household living conditions, in particular those of women;  
Increase household wealth; and  
Increase participation in economic and social life as well as fostering autonomy among various population groups.

The methodology would need to be centred around a socio-economic data gathering system on households. A control group would be acknowledged, both qualitative and quantitative indicators would be drawn from the data collected from interviews and/or questionnaires, and follow-up visits/questionnaires would be established.

There are a number of important questions to be answered about the practicality and efficacy of an Impact Assessment Rating system:

Poverty impact assessments may show individual donors that their money is being spent well, but can it satisfy private investors, such as commercial banks?

It is taken as a given that an MFI must be financially viable before it can improve access to the poor. Thus, it is important that the MFI become financially sustainable; then it can offer whatever level of services it wishes to its customers. However, with the sudden proliferation of MFIs and the multitude of different business practices they employ, it is difficult to predict which ones will be ultimately successful. It is in this respect that one ought to look at what has driven the microfinance industry—the resourcefulness of the poor. The growth
of the industry is based on the tapping of a resource that was previously deemed to be unprofitable. Indeed, it is the ability of MFIs to increase the living standards of the poor that is an indicator of their success. If an MFI can be acknowledged for improving the lot of its clients as a result of its level of access, it is a good indication that the MFI will be sustainable in the long term.

If individuals and households are to be seen as emerging from poverty, how do you go about defining “poverty”?

This question revolves around the issue of what standards, performance indicators, or benchmarks are most appropriate for an assessment rating. These would, as mentioned, either be formed by the MPA or decided by those organizations tapping into an MPA Rating Fund, led by certain minimum guidelines. The acceptance of such measures can be seen in how many MFIs and evaluation agencies voluntarily involve themselves in the system, and what kind of reaction it is given by donors, investors and banking institutions.

How do you know if someone has risen out of poverty due to the services offered by the MFI, or if it was due to something else?

The answer would have to be determined from the accuracy of the methodology used, but would also depend on taking a deep look into all the factors involved in poverty alleviation. MFIs will certainly be more successful if they are working in a favourable environment, and if their efforts are supplemented by different sorts of development initiatives within the community. How an MFI takes advantage of its surroundings and how it associates itself with other development organizations may be determining factors in its impact on poverty alleviation.¹

What does everyone think?

~Patricia

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Patricia Uhuru <puhuru@freedom.net>
Project Manager
Eastern Africa – Poverty Alleviation Project

¹ Source: Options for a New Micro-finance Promotion Agency - Draft Document
Hari Srinivas - hsrinivas@gdrc.org - http://www.gdrc.org/icm/govern/impact-assessment.html
In your role as facilitator, what do you do? Compose your answer in the form of an email.
7. Scenario: Consistently Off-Topic Messages

Over the course of the last few weeks, one of the members of the list (Pierre) has posted a couple of off-topic messages related to the consulting services that his company offers in the area of micro-credit. The most recent of his messages is listed below.

To: PAOCA <paoca-cl@lyris.bellanet.org>
From: Pierre Diallo <pierre@consultarama.net>
Date: 15/12/2002
Subject: Consultant for Hire

Dear friends,

Consultarama can help you turn your project around. We have 700 years combined microcredit expertise in 49 countries around the world.

Our list of satisfied clients includes:
- World Bank
- IMF
- WTO
- ADB
- IADB

Can you afford not to use the services of Consultarama?

Visit our website at http://www.consultarama.com

Guaranteed results or your money back!

Bless you all,

Pierre
In your role as facilitator, what do you do? Compose your answer in the form of an email.
8. Scenario: Cultural and Gender Conflicts

In the midst of a healthy discussion on micro-finance best practices, a list member posts a culturally inappropriate and insensitive message.

To: PAOCA <paoca-cl@lyris.bellanet.org>
From: Pierre Diallo <pierre@consultarama.net>
Date: 15/12/2002
Subject: Grameen model for Africa

Dear friends,

In Patricia’s recent message she suggests that the Grameen micro-finance example should be replicated throughout Africa. In my opinion, the Grameen model will never be successfully replicated in Africa. Women were instrumental in the development of the Grameen model and as a result, this particular model wouldn't work well in Africa because women there are much more submissive than South Asian women.

My 2 cents,

Pierre

In your role as facilitator, what do you do? Compose your answer in the form of an email.
9. Scenario: Power Relations

The following email has been forwarded to the list from a senior manager within the United Funding Agency. The message was posted over a week ago and has received no response.

To: PAOCA <paoca-cl@lyris.bellanet.org>
From: Donald Green <dgreen@funder.net>
Date: 19/12/2002
Subject:

Dear project recipients,

As head of Evaluation at United Funding Agency (UFA), we urgently need your input to assist us in improving the quality of our project delivery.

Learning is not a spectator sport and we need all of your experiences to help us. We have many success stories but often the richest learning comes from failure.

We would like to hear about all of your failures so that we continue to improve project delivery here at UFA.

Please share your failures with the other list members so that all may learn.

-------------------
Donald Green <dgreen@funder.net>
Chief Evaluation Officer (CEO)
United Funding Agency

In your role as facilitator, what do you do? Compose your answer in the form of an email.
c. Facilitator Guidelines

During this exercise, you might have observed or discovered some guidelines that would be useful for a facilitator to follow.

*Create a list of useful guidelines for facilitators:*
11. Evaluating the Discussion

Why evaluate discussions?

Taking stock of outcomes & outputs
Summarizing discussions
Staying on track

Why else would you want to evaluate discussions?

Revisiting the objectives of a discussion:

One technique for revisiting objectives would be to conduct a retrospective review of activities and discussions on the list.

Issues to consider during an evaluation:

1. Level of participation:
   - number of messages
   - unique contributions (are discussions dominated by a few people?)

2. type of ongoing sharing (docs, links, other resources?)

3. output/outcomes of the discussions

4. revisiting the objectives of the group

5. measuring current expectations of members

6. member satisfaction, needs, concerns

7. new members

8. range of organizations represented
12. Reference Materials

a. Setting up a new skin

*(available for Partners and Member organizations only)*

A Dgroups Skin defines the standard look and feel across all or a set of your Dgroups. It generally consists of the following:

- top header images
- the menu bar (links to Home, Messages, Participants, Resources, Calendar,...)
- the search box
- the login/logoff/join text
- links to view the Dgroup in alternate languages
- footer text ("Dgroups is a joint initiative of...")

So that we can properly construct your Dgroups Skin, you should provide the Dgroups technical team with an HTML template of how you would like your Dgroups to look. Most organisations wish to adapt their website look and feel for their Dgroups skin. Take the time to browse existing Dgroups to help you get ideas of how you would like your Dgroups to look. The best way to create this HTML template is to copy the source from an existing page.

If it is not possible to supply the Dgroups technical team with an HTML template, then please provide us with a link to an existing website who's look can be adapted to create the Dgroups skin, and answer the following questions:

- Where would you like the search box located?
- Where would you like the login/logoff/join text located?
- Where would you like the language choice links located?

We also need to know:

1. What languages would you like your Dgroup to support? Current choices are: English, Spanish, French, and Portuguese.

2. Do you want a calendar associated with your skin? If yes, then every Dgroup you create with this skin will have a calendar linked to it for use by the Dgroup participants.

3. Do you want a resource sub-category listing always visible, and if so, where? Note that resources can categorized and viewed by category.

Setting up a new skin requires about 1 week.
All requests should be sent to support@dgroups.org
b. Dgroups Partnership Categories of Participation


Overall, the partners will support activities of Dgroups through funds raised by new members and new partners. If not enough funds are raised in a given year, the partners will share the cost themselves. There are three levels of participation in Dgroups:

(a) Partners

$25,000 USD initial contribution, $25,000 renewal fee after five years (the term to be reviewed by Partners).

Rights:
- Appointed representatives of each partner make decisions for the Dgroups Partnership.
- Three customized skins per partner, and limit of 35 groups per skin.
- Partners receive unlimited creation rights on the generic branded (default) skin.
- Recognition as a main supporter of the partnership in tagline (email & web).
- Partner will face fewer restrictions on resource use than member spaces.
- Access to advanced mailing list options with their workspaces.
- Access to support from the Dgroups partners mailing list & technical support responses acknowledged within a 24hr time period during business days.

Obligations:
- Commitment to be funders of last resort if new partners do not support the activities of the partnership.
- To actively promote Dgroups.
- To raise funds through new partners & members.
- To attend partnership meetings (at least one per year).
- To abide by the criteria established for the granting of workspaces to new organizations and activities.
- To use the standard Dgroups tagline on their skins & email footers.

(b) Members

$10,000 USD initial contribution. Members can upgrade to full partners by paying the difference, to be endorsed by Governance. (the term to be reviewed by Partners)

Rights:
- One skin, quota of 25 workspaces assigned.
- Ability to attend partnership meetings, but not vote.
- Unlimited creation of generic branded workspaces.
- Members will face fewer restrictions on resource use than free spaces.
- Access to advanced mailing list options with their spaces.
- Access to support from the creators mailing list.
- Limited initial support from the Host.
Obligations:
- To abide by the criteria established for the granting of workspaces to new organizations and activities.
- Must use quota of 25 workspaces with custom skin within first three years.
- They will train their own creators and administrators.
- To use the standard Dgroups tagline on their skins & email footers.

(c) Users

$0 cost. Initially they will be given access only through partners and members.

Rights:
- Unlimited creation rights using generic skin.
- Support provided by Creator organization (existing Partner or Member).
- Can be given generic spaces by current partners & members.
- Access to public communities of interest in managing and hosting Dgroups.

Obligations:
- To abide by the criteria established for the granting of workspaces to new organisations and activities. (See acceptable use policy).
- Must be responsible for their own workspace contents.
13. Review

You may review your notes for this activity. You are going to select three main things you have learned in the seminar. Review these in your notes or this manual and be prepared to explain one of them to the group. We ask you to select three because someone else might select one of the points you have chosen. By choosing three items, there should be one left by the time your turn comes.

We have had several ways of learning. There was the first part where the instructor led activities. Later, you were on your own, with the instructor available to help as needed. There were exercises and there was reading. What types of activities did you prefer?
14. Evaluation: To be Completed by Participants

AAR-style review group discussion:

1. Objective Questions:
   What are some of the things we did in the workshop?
   What words or phrases do you remember the most?

2. Reflective Questions:
   What were the high points of the workshop for you?
   What were the low points?
   Where did we struggle the most?

3. Interpretive Questions:
   What was the turning point in the workshop?
   What new vantage point has this workshop given us/you?

4. Decisional Questions:
   What's the next step for you to implement what you've learned during this workshop?

One important part of training is to receive specific feedback from people who use the materials. With that in mind, we have created a questionnaire for your comments. Please treat this questionnaire as a guideline. Feel free to add comments about any areas you feel we have missed.

Your name and address (optional):

__________________________________________________________________________

Course name:  

Duration in hours: ______________________ Date: ________________________________

Location: __________________________________________________________________________

Instructor(s): __________________________________________________________________________

_____________________________________________________________________________________

Please indicate your answers below with an x or a check.

<table>
<thead>
<tr>
<th>TOPICS</th>
<th>How relevant did you find this section?</th>
<th>Delivery method</th>
<th>How well did this section work?</th>
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<tbody>
<tr>
<td></td>
<td>very</td>
<td>somewhat</td>
<td>not very</td>
</tr>
<tr>
<td>1. Introduction</td>
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<tr>
<th>Topics</th>
<th>How relevant did you find this section?</th>
<th>Delivery method</th>
<th>How well did this section work?</th>
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<tr>
<td>2. Introduction and Expectations</td>
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<tr>
<td>3. Different types of Dgroups: Case Studies</td>
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<td>4. How to help a community plan for an online discussion</td>
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<td>5. Setting up your discussion using Dgroups</td>
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<td>6. Administration Features of Dgroups</td>
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<td>7. Mailing Lists</td>
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<td>8. The Dgroups Support System</td>
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<td>9. Getting the discussions started</td>
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<td>10. Facilitating Discussions</td>
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<td>11. Evaluating the Discussion</td>
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<td>12. Reference Materials</td>
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<tr>
<td>13. Review</td>
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Please indicate the extent to which you agree with the following statements.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Ranking</th>
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<tr>
<td>14. The introductory exercise was helpful.</td>
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<td>15. The notes for participants were easy to read.</td>
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<tr>
<td>16. The layout of the manual made it easy to follow.</td>
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<td>17. The words used in the manual were easy to understand.</td>
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<td>18. The explanations in the manual were easy to understand.</td>
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<tr>
<td>19. The manual was the right length.</td>
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<td>20. The graphics of the manual were easy to read.</td>
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<tr>
<td>21. This course will help me use the Internet.</td>
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<tr>
<td>22. The training was what I thought it would be.</td>
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23. Topics that should be added:

________________________________________________________________________

________________________________________________________________________

24. Topics that should be removed and why:

________________________________________________________________________

________________________________________________________________________

25. Other comments:

________________________________________________________________________

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