

# Group Admin Guides

All the information to manage your Group should be here but if you can't work out how to do something you can email [tech@rebellion.earth](mailto:tech@rebellion.earth).

- [The XRUK Volunteer Agreement](#)
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# The XRUK Volunteer Agreement

How to sign the Volunteer Agreement, and to check other people who have access to personal data have signed.

Personal data includes email addresses, phone numbers, addresses, or anything which could identify an individual. It does not matter whether the person is in XR or not, if you have access to their data, you should sign the agreement.

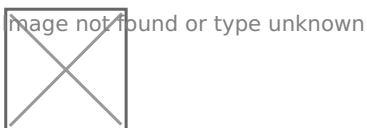
n.b. This agreement is jointly owned by the Rebel Pathway circle and the GDPR & Security circle.

## What the agreement is for

The **XRUK Volunteer Agreement** is an agreement which must be signed by people who have access to Personal Data. That includes all Hub Group Admins, and anyone else anywhere in XRUK who have access to any individual's data (like mailing lists, membership lists, details of who is attending an action, etc.).

## Signing the agreement

If you are on the Hub, and you haven't signed the current version of the Volunteer Agreement, the following icon will appear on your Hub Home screen:



Click the icon to go to the Volunteer Agreement on Action Network.

If you are not on the Hub, you can click the link above to go there directly.

## What happens if I have not signed

When you login to the Hub, if you are a Group Admin, or have other elevated permissions, you will

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see this screen:



You should sign the ageement as soon as possible.

The Hub checks who has signed the agreement every night - so, if you sign, the Hub will not know about it until the next day. If you have signed today, so the Hub does not know, please click "Continue to the Hub".

## What if I can't use my regular email address on Action Network

If, for any reason, you are unable or unwilling to use Action Network to sign the agreement with your regular email address, then copy the [Volunteer Agreement](#) from Action Network, paste it into an email, add some text to say you agree to abide by it, and send it to the "GDPR & Security" Team at [dataprotection@rebellion.earth](mailto:dataprotection@rebellion.earth).

## Checking if others have signed the agreement

Everyone in your group who has access to personal data (e.g. newsletter distributors, fundraisers, recruiters, Rebel Ringers, etc.) must sign the Volunteer Agreement. Please encourage them to do so.

## Group Admins

If you are a Group Admin of a Group on the Hub, the "All Members" button will show you which version of the Volunteer Agreement your members have signed (if any).

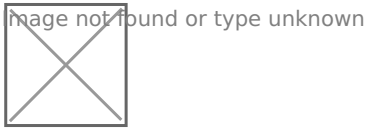
You should ask anyone in your group who has access to anyone's Personal Data to sign it.

## Administrators of groups not on the Hub

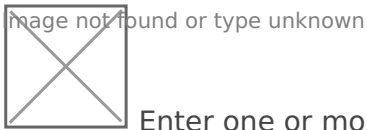
If you are looking after Volunteers in systems outside the Hub, please contact the "GDPR & Security" Team at the [GDPR & Security Mattermost channel](#) or by email

[dataprotection@rebellion.earth](mailto:dataprotection@rebellion.earth). They can arrange for you to have access to the Hub, with special permission to look up email addresses to see if they have signed.

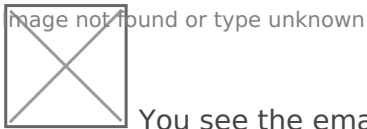
When you login to the Hub, your Home page will include this icon:



Click to go to this screen:



Enter one or more email addresses, one on each line, and click Submit, to see this screen:



You see the email address or handle you entered, which version of the agreement they signed, when they signed it, and a tick under Ok if it is a current version. (The Volunteer Agreement may be updated from time to time, and, if the update is significant, people may need to sign the new version again.)

## Updating the agreement

The Volunteer Agreement is jointly owned by the Rebel Pathway circle and the GDPR & Security circle.

GDPR & Security circle maintain the sections for Data Protection, Terms of service, and Confidentiality. Rebel Pathway circle maintain the rest.

When we change this agreement in any significant way, there will be a new version in Action Network to sign. The new version will have a different flag on your record if you sign, and it will have a different date on the top of the page. Thus we know when people signed - and a record of what the form said at that time. This is for Data Protection record keeping.

Each circle will promote people to sign this form - and in that way encourage more rebels to know more about all the aspects here.

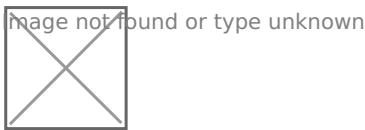
# Inviting People to your Group

## How to invite people to your group

To get to the Hub, type - [hub.extinctionrebellion.uk](http://hub.extinctionrebellion.uk) - into your browser address bar

You should use the Hub to invite new people to your group. This is because an invite to the Hub sets people up correctly on all the new services. You can also invite people to individual services, but you have to do all the work the Hub would have done yourself (inviting people to the right Teams, Channels and Forums, for example), so it is much easier just to invite people via the Hub.

To send an invite, select your group from the list of Groups, then use the 'Invite Rebels to Group' from the Admin section in the group page – then you will see this screen:



You can add as many email addresses, logins or handles of people to invite as you like (**one per line**), and you can add a personal message for the users you are inviting. If you put @ in front of a handle, the Hub will only search for that handle in Mattermost – otherwise it will search handles and logins on all the services (some people have different handles in different places).

Invite emails will contain your email address, so the invitee can contact you for help or advice. If you have used a personal email to register on the Hub, that is the email that will be in the invite. If you are not happy with this, then make sure there is a generic group email address in your group's Contact Info - then you will be offered the opportunity to use that email address in your invites by ticking the box.

Invites expire in 14 days, so if someone doesn't follow their invite within that time, you will have to invite them again.

Invites normally go out by email – but if you search by handle, the Hub may find someone on Mattermost who has not registered with the Hub, and does not know their email – in which case it will send them a Mattermost Direct Message instead - the Hub's handle is xrukadmin.

## How to invite people via a private Mattermost channel


If you click the Mattermost Invite green link at the top of the Invite People page, you see this screen:

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This lets you select a **private** channel in Mattermost that belongs to your group, and post an invite link in there. Anyone who is in the private channel can follow the link to join the Hub. They will then have access to all your group's channels, forums and cloud space.

This is useful if you have invited people to your channels on Mattermost, but haven't invited them through the Hub.

## How to view invited people - List Invites

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This shows all the invites sent out for this Hub Group.

Every invite still on file for the group is shown (all invites over 60 days old are removed). If the invite has been Accepted or Rejected, this is shown - there is nothing further you can do with these.

If the person is on the Hub with that email, their Hub login is shown.

Status	where the person is at with the invite you sent
Sent	you've sent it and they haven't Accepted
Accepted	they've accepted and are now a Member of the group
Rejected	they've rejected their invite

**Expires** - two weeks after the invite was sent.

**Login** - the invitee's Hub login name (which can be different from their MM handle).

Join Status	
Member	they have a Hub login <b>AND</b> have Accepted the invite so are now a Member of the organisation to which you sent the invite
-blank-	they don't have a Hub login and they haven't Accepted the invite
On Hub	The person is on the Hub, but has not accepted your invite
Mattermost Problem	The person is on the Hub, but had a problem connecting to Mattermost. Please contact them to see if you can help (see <a href="#">Mattermost Problems</a> below), or pass the problem to DDAT
Forums Problem	As above, but for Forums

Join Status	
Nextcloud Problem	As above but for Nextcloud

All invites with **Sent status** (i.e. that haven't been followed yet) have the following options:

1. **Edit icon** - opens the invite, so you can edit it, or delete it. Note that, if you have changed anything on the screen, those changes will be lost if you click this (there is a prompt to make sure that's what you want).
2. **Copy icon** - copies the url for the invite to your clipboard - this is useful if you want to send it to someone by some other means, as they haven't received the email.
3. **Resend checkbox** - tick this to mark the invite for resending by email. It will not actually be resent until you save the form.
4. **Renew checkbox** - tick this to mark the invite for renewing (setting the Expiry date 14 days from now). It will not actually be renewed until you save the form.

In addition, there are tickboxes for all at the bottom so you can easily resend or renew all the invites.

If you then click 'Save', any invites where you have ticked Renew will be renewed, and you will be taken to the normal Send Invites screen, with the emails of all the people where you ticked Resend already filled in.

## How to fix problems with people signing up

The 'User Sign Up Errors' button on XR Groups pages lists any errors users had when the Hub tried to join them to all the right things in Mattermost, UK Forums and UK Cloud. If you see any problems here that you can't fix by speaking to the person, please contact us on [Digital Discussions Applications Team Reception](#).

## How to fix Mattermost [MM] Problems

A Join Status of **Mattermost Problem** against an invite means they are on the Hub, but have not got on Mattermost for some reason. The solution begins with finding out what the problem is (usually by getting them to log into the Hub, and seeing what screens come up).

The problem is usually one of the following:

Problem	Solution
Their <b>login name already exists</b> on MM, but <b>doesn't</b> belong to them, but they haven't changed it to one that isn't already in use	Click on the 'Try a different name to create a different login name on the Hub.' button, and try a different login name in the next screen.

Problem	Solution
Their <b>login name already exists</b> on MM, <b>does</b> belong to them, but they haven't authorised the Hub to access Mattermost because they have <b>forgotten their MM password</b>	First get MM working by trying to log in with their login name, and clicking the button to reset the password. Then they need to log in to the Hub, and authorise the Hub to access their account.
Their <b>login name already exists</b> on MM, <b>does</b> belong to them, but they haven't authorised the Hub to access MM because they haven't responded to (or haven't got) the <b>MM email confirmation</b>	First get MM working by trying to log in with their login name, and clicking the button to resend the email. Next in their emails, follow the link to activate their MM account. Then they need to log in to the Hub, and authorise the Hub to access their account.
Their <b>login name already exists</b> on MM, does belong to them, but has a <b>different email</b> to the one they are using for the Hub	Change their email address on Mattermost or on the Hub, so they match.
Their <b>email already exists</b> on MM, but they haven't authorised the Hub to access Mattermost because they have <b>forgotten their MM password</b>	First get MM working by trying to log in using their email, and clicking the button to reset the password. Then they need to log in to the Hub, and authorise the Hub to access their account.
Their <b>email already exists</b> on MM, but they haven't authorised the Hub to access MM because they haven't responded to (or haven't got) the <b>MM email confirmation</b>	First get MM working by trying to log in using their email, and clicking the button to resend the email. Next their emails, follow the link to activate their MM account. Then they need to log in to the Hub, and authorise the Hub to access their account.

This screen shows if they have chosen a login name that matches an existing name on Mattermost. It lets them choose a different login name (if the Mattermost account isn't them), or link their Hub



account to their Mattermost account:

This screen shows if there is an existing Mattermost account for their email address. It lets them



link their Hub account to their Mattermost account:

## Removing people

To just remove someone from you group, click the "Members" dropdown in your group screen, click on their entry, then click "Remove User From Hub Group" at the top.

If someone is stepping back altogether from all their roles, you may find the [Step Back From Roles](#) screen useful.



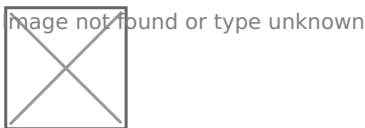
# Add and Edit Groups, Channels & Forums

**Note:** If any of what follows makes you nervous, drop a request into 'Hub Help Desk' on Mattermost and say you would like to practise Hub management for Trumpton! Then you can safely test functions without doing harm!

## Groups

### 'Edit Hub Group' Screen

The '**Edit Hub Group**' screen lets you rename your group, or any of its teams, channels, forum groups, forums or cloud group. Here is an example of how this screen is laid out for the 'DDAT' Circle:



The edit screen helps when, for instance you change your circle name or shortened name. It will update all of the other names on the screen to match (albeit, you can still edit them too). When you click 'Save' it will update everything on the Hub and on the other services.

If the changes it makes automatically do not suit you, you can change names back on the: **individual team, channel, forum or cloud folder.**

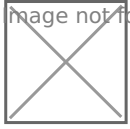
**Duplications.** You may get an error message if one of the names you have chosen has already been used by another organisation.

It also lets you change the setting where members of **child groups** are automatically invited to your group. If you tick '**Invite All Members of Child Hub Groups?**', all members of any descendant (child, grandchild, etc.) group will be invited to join this group. When they accept this invite, they will be full members of your group, and have full access to everything, i.e.: **Team, public and private channels, public and private forums, and cloud storage.**

Note: if you change it from unticked to ticked, the invites will be sent out immediately when you 'Save'.

You can also change '**Child Hub Groups can use our Team**'. If this option is ticked (this is the default), then new child groups you create will use the **same Mattermost Team** as this group.

## How to Change Your Group Name



The Community Assemblies crew wanted to change their abbreviated name on the Hub. The yellow highlighted option is where they selected to change the Group's abbreviated name.

'**Edit Hub Group**' lets you edit your:

- groups's name
- short name
- whether you want members of Child Groups added to your Mattermost Team
- contact details for your group
- names of all your Channels
- Forum Groups
- Forums
- Nextcloud Group

## Edit Contact Info Screen

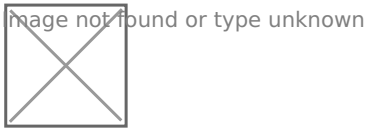


You can reach this screen by clicking the edit pencil (highlighted in yellow in the illustration) in the **More Info/Contact** dropdown of your Group screen. Click on the grey bars to open up drop down options.

At the top, under **Public Info**, is where you can place public contact details for your group. These will appear on the **UK Regional Map**, and possibly other public websites, such as social media sites.

**IMPORTANT!** Since public access to this information is possible, **DO NOT PUT PERSONAL OR PRIVATE ADDRESSES IN HERE.**

The last section, under **Members Only Info**, is information you only want members of your group to see. It is intended for such things as Zoom meeting links, or other information that might also go in a Mattermost channel header. If Mattermost is unavailable, the Hub is another way of group members accessing 'need to know' information, such as in this case, Trumpton Group's meeting arrangements.

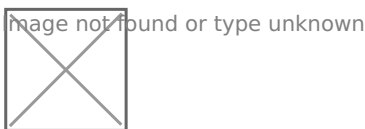


Contact details and Members Only accept Markdown (like Mattermost and Forums), so you can format your details and put links in.

## How to Create a New Child XR Group

If you are part of a large group which has a number of smaller working groups (e.g. a large working group, like Communities) example working groups would be, for instance, 'Local Group Development', 'Rebel Pathway', etc.). Where there are complex structures, you can create separate Hub Groups for your working groups on the Hub, with information on their new services.

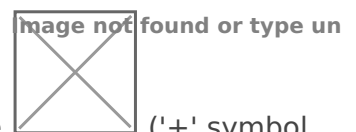
(NB the above info on Communities Circle will change in 2023!) Back to the Community Assemblies example, however, check out the yellow highlighted option below:




Click '**New Child Group**' in the **Admin** menu of your Group display, or click "**Create New Group**" in the grey menu. This takes you to a [new group screen](#) in the '**Setting up a new group on the Hub**' document.

## Channels

### How to Add a New Channel



Open the '**Services**' grey dropdown bar on your Group page. Then click the  ('+' symbol in a circle) button. This takes you to the **Create Channel** screen to create a public or private channel in the corresponding team.



The name of the Channel will be made up of the **Prefix** and the **Name**. The Prefix defaults to your group short name; this is to help us avoid trying (and failing) to create 100 channels called "Media & Messaging" for 100 different working groups!

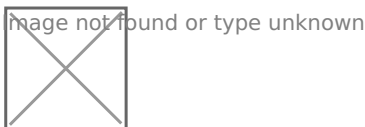
When you click '**Save**', the Channel will be created right away. All your group members will be joined to it in due course. There is a background job running which does this, so it may take a while for it to catch up, or it will happen the next time they log in to the Hub.

# How to Change your Channel Names, Public / Private

Either click on the '**edit pencil icon**' next to a channel, or '**Edit Channels**' shows all the Channels for your group. Clicking on one will allow you to edit the name, and you can choose to change whether the channel is public or private. When you Save your changes, the Hub will update Mattermost with your changes.

The list has a '**Show Unclaimed**' button allowing you to also include unclaimed channels you are in; you can pick one and claim it for your group.

## How to See Who is in Your Channels



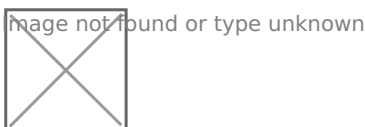
The **Edit Channel** screen, accessed via the **Admin** menu (see above highlighted option). This also has a '**List Members**' option to list all the members of the channel on **Mattermost**.

Select a Channel, then click '**List Members**'. This shows which of those people are on the Hub, and whether they are a member of your group.

There is also a button next to people who aren't in your group, which you can tick to invite them.

There are bulk buttons at the bottom, to invite everyone who should be in the channel, or remove everyone who shouldn't be in it (because they are not members of your group).

## How to Delete Channels



You can also delete channels in the '**Edit Channel**' screen (except for the ones the Hub needs you to keep, i.e.: your Reception and your main channel. Message the Hub Admins in the [Digital Discussions Applications Team Reception](#) or [Tech Champions & Group Admins](#) channels if you want to delete those.

Deleting a channel here will also delete it on Mattermost.

## How to Share Channels With Other Organisations

You can share a channel with other groups. This is useful when multiple groups are working together on an action or project. All members of all the groups your channel is shared with are joined to that channel.

To do this, click on the  icon next to **Shares**, to see this (Trumpton group example)

screen:



Choose the group you want to share with from the drop-down list. Another dropdown will appear, so you can share with multiple groups.

An  will appear to allow you to **remove** that share.

Click **Save** when done.

## How to Restore Archived Channels

Mattermost lets anyone in a channel archive it. This removes it from the channel list. People sometimes do this by mistake, thinking it only archives it for them, not everyone! Important!:

**Archiving a channel archives it for everyone!**

If someone has archived one of your channels by mistake, you can restore it the following day. The Hub notices it has been archived on its overnight check, and adds an **Unarchive** button to the edit channel screen; this is how you restore the channel.

## Claim Channels. If you already had Mattermost channels created before you came on to the Hub

Some people set up their group on Mattermost, without joining the Hub first. If you did this, you should first claim those channels for your group on the Hub. This way, the Hub knows they belong to you, and can join people to them when you invite them to the Hub.

The procedure for claiming a channel is as follows:

1. In Mattermost, invite **@xrukadmin** (the Hub's login to Mattermost) to all the Teams and channels you want the Hub to know about. If inviting xrukadmin to a **Team**, make it a **Team Admin** (in 'Manage Members').
2. Wait 24 hours for the Hub to recognise your channels.
3. Claim the channels in the Hub:
  - Go to your group in Groups
  - Click Edit Channels
  - Click the 'Include Unclaimed' button – this will add any other channels you are a member of but which don't belong to a group on the Hub yet.

- Click on each channel you want to claim, check the details on the next screen, and click save to claim it for your organisation.
4. You can then, if you wish, post a generic link to one of your private channels to allow anyone in that channel to join your group on the Hub. To do that:
- Go to your group in Groups
  - Click Invite Users
  - Click the Mattermost Invite button
  - Choose the private channel to post the invite to
  - Add an optional message from you
  - Click Post Invite to Mattermost

# Forums

## How to Add a New Forum



Open the '**Services**' dropdown on your Group page. Then click the button, which takes you to the 'create forum' screen; here you can create a public or a private forum.

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The name of the Forum will be made up of the Prefix and the Name. The Prefix defaults to your group short name, and is to help us avoid trying (and failing) to create 100 forums called “Media & Messaging” for 100 different working groups!

You must choose which top level category the forum goes in.

When you click Save, the Forum will be created right away. All your group members will be joined to it in due course (there is a background job running which does this, so it make take a while for it to catch up), or next time they log in to the Hub.

## How to Change Forum Names and Locations or Delete a Forum

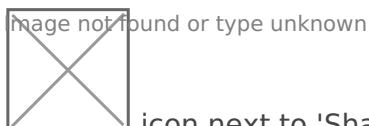
You have 2 options:

- Click on the **edit pencil** next to a forum, or
- '**Edit Forums**' lists the Forums for your group; clicking on one will allow you to edit the name and the parent category. When you 'Save' your changes, the Hub will update UK Forums with your changes.

You can also **delete forums** here. However, this does not include the ones that the Hub needs you to keep, i.e.: your Reception and your main forum. Message the Hub Admins in the **Digital Discussions Applications Team Reception** or **Tech Champions & Group Admins** channels if you want to delete any. Note: Deleting a forum here will also delete it on UK Forums.

## How to Share Forums With Other Groups

You can share a forum with other groups. This is useful when multiple groups are working together on an action or project. A shared forum appears in the forum list in **UK Forums** for all members of all the groups it is shared with. Forums be shared with different permissions for each group; i.e. **Full Access**, can **Comment** (but not post a new topic), **Read Only**.



To do this, click on the icon next to 'Shares', to see this screen:

[  
https://rebeltoolkitextinctionrebellion.uk/uploads/images/gallery/2023-04/scaled-1680-/image-168

Choose the group you want to share with from the drop-down list. (In the image, the text reads: "Share Trumpton Reception with". You can also choose to limit this group's access to the forum in the 'Permission Level' dropdown.

Another dropdown will appear, so you can share with multiple groups. An **X** will appear to allow you to remove that share.

## Members

### Adding Members

To add people to your group, you need to **send them an invite**. See **Inviting People to your Group**

### Removing Members

To just remove someone from you group, open the "Members" dropdown, then click on their entry, then click "Remove User From Hub Group" at the top.

If someone is stepping back altogether from all their roles, you may find **Step Back From Roles** screen useful.

### Edit Messages Screen

## How to Change Default Welcome Messages

To add/edit messages click the 'Messages' link in your Group screen.

**Welcome messages are sent via MM Direct Message** to people who have just joined your organisation on the Hub. They come from xrukadmin (the Hub's Mattermost login). Note: **xrukadmin does not read replies**. It is recommended that you include instructions to contact **your own Mattermost handle** in the automated welcome message. E.g. *"Do not reply to this message, contact @fred-xrtrumpton if you have any questions"*.

Just enter the message text, then click 'Save'. You can use Markdown formatting, like you can in Mattermost, Forums and Cloud. Subsequently, anyone who accepts an invite to your organisation will receive that message overnight, as the Hub runs updates in the early hours of the morning.

## How to Set Reminder Messages

Reminder messages are useful for regular events, like a weekly meeting. They are posted to your channel of choice on Mattermost, by xrukadmin, the Hub's Mattermost login, each night.



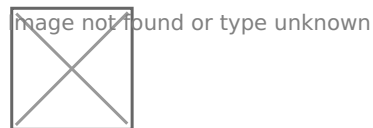
# XR Groups, Roles and Mandates

Read this guide to learn how to use the Hub to manage your group's mandates, roles, members, etc.

## XR Groups Screen

myxrgroups.png  
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If you click 'My Groups' on the Home page, you will see a screen like this:



Choose a group to see all its details in context.

**This is the Group Admin view - ordinary users can see this screen, but won't have the links to change things.**

If you want to become a **Group Admin** for a group in order to be able to edit here, you will need to contact your Internal Coordinator (IC) / External Coordinator (EC) or an existing Group Admin who is listed for your group.

This page shows the group in context. You can click on any of the group names to see its **parent** and **children** groups. You can click on the dropdowns to see more information.

Each group is displayed the same way. Public links are always clickable. If you are a **member of the group**, the private links are clickable too. If you are a **Group Admin**, the extra admin links also appear.

The **graphic display** shows the group in context - you can click the full screen icon (the black 4 x corners making a square, top right) to make it bigger.

You can click on groups within this view to shift your view to display a different group. To come back out from that group and back into the bigger framework of groups, use the spyglass icon, top left.

image11.png  
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**Structure** To find your way about XRUK, you can click on any group name on the screen to show that group, with its **parent** and **children** groups. Alternatively, you can click on a group in the **Hub Circles XR Organism graphic display** at the top right of the image above. This has a full screen button (the 4 x corners making a square, top right) to make it larger and easier to navigate.

If you are using the **Hub Circles** display, you can click the **Filter** link text below the graphic (in green font). This will hide some of the detail, to make the diagram less busy. **If you set a filter, it is remembered, and used every time you open this view.**

Here is an illustration of what the filter function brings up for someone looking at the Cymru Circle:

[My Groups filter.png](#)  
Image not loaded. It type link down

Don't be afraid of playing around with your options to filter here! Just remember that the filter stays in place for any future visit to this screen, so you might want to revert back to the full picture, with no filters before leaving the page!

## XR Organism

To describe our XR UK organisational structure, we are on: [organism.extinctionrebellion.uk](https://organism.extinctionrebellion.uk). This is a public view updated from the Hub every night.

## How To Find a Person to Contact Them on Mattermost

Click the grey 'Roles' band to open up a drop down of further detail. If you click the name of someone you wish to contact, you will automatically have a new tab opened that will take you to a direct messaging thread with that person on Mattermost.

## How to Change People's Roles in your Group

All roles all have a 'shelf-life', called a tenure, i.e. they have a pre-arranged end date, agreed with the person stepping into a role. Having an end or review date will allow for new people to step forward to take on responsibilities and allow for life-changes for those in the role. This helps to mitigate for power. When someone's role reaches its end point, in order for people searching to find contacts for your group, (usually) the IC, or the Admin, for the Group will edit contact names and details.

The **'Roles'** dropdown lets you view/edit the Roles within your group. Alternatively, you can click on an individual role in the display to edit it. See [Edit Role screen](#) below. The Roles dropdown view will show who is in the Core Roles and any sub-groups of that circle.

## How to Change Your Group's Mandate

The **'Mandate'** dropdown will show the group's Mandate. If you are **Group Admin** of the **parent group**, you will see an edit **pencil** button that will let you change the mandate.

To edit the Mandate:

- First ensure the parent circle has agreed the changes
- Select Mandate dropdown
- Click the edit pencil
- Make changes
- Save

The **XR UK constitution** says that all working groups should have a Mandate. However, **not all parts of XR UK are covered by the constitution**. Some Hub Groups were created without one.

The Mandate sections include:

- Purpose
- Accountabilities
- Domain
- Policies (optional section)

As a guide to completing the Mandate, you might research those of similar Groups in your region, or UK wide (Working Groups and Circles). Such existing Mandates may assist with arriving at your own wording.

See Rebel Toolkit guidance here: **[Mandates and How to Write Them](#)**.

## How to See Changes Made to Roles, Members, Mandates

The '**History**' link will show all changes made to roles and mandates over time. If you are viewing a role or mandate, it will just show the history of that item.

## How to See People In My Group

The '**Members**' dropdown shows you a list of everyone. Here you can set their roles, make them Group Admins or turn Group Admin status off. From there, you can click 'All Roles' to see all the roles that person has. From here you can click '**Step Back From Roles**' to pass those roles on to someone else.

**If you remove someone from one or more roles which are linked to another group, and that is the only role they hold in that group, you will see another screen where you can confirm whether or not they should also be removed from the other group.**

An example of this might be an External Coordinator (EC) who is in a 'link role' to the Parent Circle. There may also be a link role from one group to another, e.g. Facilitation has a link role to XR UK Talks and Training.

## How to Change My Role

'**Edit My Role**' in the **Admin section** lets you edit your own role in the group. Everyone in your group can edit their own role.

Note that only Group Admins can **assign people** to **core roles**. Core roles show in blue circles on the diagram (See the Wales example illustration above).

For more about **core roles** see the **XR UK constitution**.

## Edit Messages Screen

### How to Create / Change Semi-Automated Welcome Messages

To add/edit messages click the 'Messages' link in the Admin section.

#### Hub-Messaging-to-Group-Members\_1.png

See the Hub window above for your Admin options in green font. Here you will see the option for 'Messages' (Circled red). Click this to create a new message. From here you can either welcome new members with a friendly Direct Message in Mattermost, or you can send Reminder messages to others already in the group to remind or inform them of e.g. of meetings, trainings, newsletter deadlines, etc.

By way of example, see the image below. This is the Community Assemblies project team, who want to send a Welcome message.

#### Hub-Welcome-1.png

Click on 'New Welcome Message', highlighted in yellow showing at the top of this next screen.

#### RT-Welcome-message-window.png

Welcome messages are sent via Mattermost in a **Direct Message** to people who have just joined your group on the Hub. They come from **xrukadmin** (the Hub's Mattermost login/handle), which does not read replies. As recipients of a welcome message cannot reply, we recommend you include instructions for them to contact your own Mattermost handle in the message. E.g. "Please do not reply to this message, as it will not be responded to. Instead, please contact @fred-xrtrumpson if you have any questions".

Just enter the message text (you can use **Markdown** (simple coding) formatting, (as you can in Mattermost, Forums and Cloud), and click **Save**. Subsequently, anyone who accepts an invite to your organisation will receive that message overnight (as the Hub runs updates in the early hours of the morning.)

### How to Set Reminder Messages

**Reminder messages** are useful for **regular events** (like a weekly meeting). They are posted to your channel of choice on Mattermost, by **xrukadmin** (the Hub's Mattermost login) each night.

# Edit Role Screen

When a new group is created on the Hub, it gets a set of 3 standard roles:


- Internal Coordinator
- External Coordinator
- Group Admin.

There are an additional 8 roles, suggested by the **Self Organising Systems** Circle, which may be selected by the Group Admin when adding new Roles to the original set.

To add a new role for your group, click the **'Add Role'** icon, then insert the role name you require.

As you type, you are offered any **Default Roles** which match the input text; if you then select a Default Role, the form is prefilled with the details (including mandate) of that role - which can then be edited, if necessary.

This is just to save typing, and will help any Group Admin who may not know the exact wording of the Mandate for the desired Default Role. Note that any new Role will have a blank Mandate - i.e. **Purpose and Accountabilities** - which may be completed at a later time.

 Ticking **Core Role** shows the role in blue instead of green in the diagram, and prevents users from assigning themselves to that role (only Group Admins can assign people to Core Roles).

The **Private** setting is the default for the role. If this is ticked, then users will have Private ticked by default. This can be changed by you or them.

Selecting a permission from the **Requires Group Permission** dropdown means that people assigned to this role automatically get that permission for this group, so they can invite people (Inviter), or edit roles, channels, forums, etc. (Group Admin).



You can add **Accountabilities**, or drag them using the **handle** to reorder them, or delete them with the red x button.

You can add Domains or delete them with the red x button.

## Setting/Changing a Role Holder

You can place users in their role by selecting their names from the drop-down 'Roles' list. With admin permissions, you may also remove them by clicking the red 'X' next to their name. The '

**Private** setting by each user should be ticked if the user does not want anyone outside the group to see that they hold this role.

You can set an '**Until**' date for each person assigned to a role. This is the date their holding of that role will be reviewed. This allows people assigned to a role for a limited time to be confident that they won't be left holding that role forever. Roles where the 'Until' date has passed will show in red on the group diagram.

## Linking a Role to Another Group

You can link a role to another group. Then, when people join that role, they are automatically joined to a linked role in the other group. Usually, you will do this for the External Coordinator (EC) role; the EC of a working group or circle automatically joins the **parent** group as the sub-group's representative. However, it doesn't have to be the parent group; for example, in the past, Cymru Wales had a "Local Group Coordinators" group, that all their local group coordinators joined.

The only limitation on editing information in this regard is that you have to be a Group Admin of both groups, i.e.: parent and child.

To **link a role**, choose the group you want to link to in the **Role Holder represents this group in Group** dropdown.

Then either select an existing role in that group from the **Linked Role** dropdown, or type in a new role name if the new role will be created in the other group.

Normally a Group Admin of one group will create a child group, which automatically makes them Group Admin of the child group. They will then link the External Coordinator role in the child group to the parent group. They may well also appoint other Group Admins of the child group, then may remove themselves from the child group when this has been done. So just because they set up this administrative work does not mean to say they will continue in administering that group; they may hand to new Admins.

If nobody is Group Admin of both groups, Coordinators or Group Admins of both groups will have to ask a **Hub Admin** to do this task for you. If you don't know a Hub Admin, ask in **Hub Help Desk** on Mattermost.

If you remove people from a role which is linked to another group, and that is the only role they hold in that group, you will see another screen where you can confirm whether or not they should also be removed from the other group.

## What Happens When a Role Allows Access to More Than One Hub Group?

When someone does one of the following things:

- Edits the Auto Join Roles screen (Hub Admins only)
- Edits the people in a role
- Edits the roles a person is in (+)
- Deletes a role
- Steps a person back from a role (+)
- Creates a group
- Deletes a group
- Admin edits a group (Hub Admins only)
- Removes someone from a group (+)

The change could entitle some people to be in different Hub Groups, e.g. if they join or leave a linked role, or a role with a support group.

The **joining or inviting happen automatically**, but any groups they should probably be removed from are first listed in a screen with tickboxes against each one, so the person making the change has a chance to untick people they do not want to be removed.

The **removal screen** is simpler in these cases, because only a single person is affected, so it just shows a list of groups the person could be removed from. In the other cases, it has to show both person and group, as there is no reason why the same person might not be joined to two or more groups. For example: all the Cymru Group Admins will be joined to the UK level Group Admins group, as well as the Cymru one.




Here is the simple screen:

Here's the more complicated screen: 

Please click 'Save' in this screen to carry out the removals. If you think a person should **not** be removed, first **untick** the corresponding 'Confirm' box.

## Step Back From Roles Screen

You reach this screen by finding a person with a role in 'All Members', clicking on 'All Roles', then clicking on 'Step Back From Roles'.

 If you choose a replacement user from the dropdown, that person will be assigned to all the roles with Process ticked (being joined to the organisation if they are not already in it).

If you check Remove From Role, the original person will be removed from the roles with 'Step Back' ticked.

If you check 'Remove From Group', the original person will be removed from all groups with 'Step Back' ticked.

If you remove someone from one or more roles which are linked to another group and that is the only role they hold in that group, you will see another screen where you can confirm whether or not they should also be removed from the other group.

So, for example:

Change Required	Action
Join a new person to the roles, to be trained by the original person	Select the new person in 'Replacement User'. Leave 'Remove From' boxes unticked. Tick all the roles you want them to be added to and untick the others.
Pass the roles on to someone else because the original user has already stepped back.	Select new person in 'Replacement User'. Tick 'Remove From Role'. Tick all the roles they are stepping back from and untick the others. If the person has left the group(s) altogether, rather than just stepped back from the role to become an ordinary member, also tick 'Remove From Group'.
Step someone back from their roles, without appointing anyone else	Leave 'Replacement User' blank. Tick 'Remove From Role'. Tick all the roles they are stepping back from and untick the others. If the person has left the group(s) altogether, rather than just stepped back from the role to become an ordinary member, also tick Remove From Group.



# Role Tenure

## How to update role tenure, so you no longer get 'tenure expired' messages

Your Group Admin can set an **Until** date for each person assigned to a role, which is the date their holding of that role will be reviewed (the role tenure). This allows people assigned to a role for a limited time to be confident that they won't be left holding that role for ever. Roles where the Until date has passed will show in red on the group diagram.

When the Until date passes, both the person and the group will receive a reminder message on Mattermost, and the role/person will be shown in red in the Hub organism diagram.

Formal, elected roles have a procedure laid down in [the constitution](#) (Choosing Role-Holders), which the group will follow to decide who holds the role and for how long.

Once any such formalities have been followed, the procedure for any of your Group Admins to update the Hub is simple:

- Log in to the Hub
- Click on Groups
- Click on the relevant group
- Open the Roles dropdown
- Click on the edit pencil for the relevant role
- Alter the Until date of the relevant person (there are 3-month and 6-month shortcut buttons to automatically set it to that period of time, if that's what you need)
- Click Save.

If you do not have a Group Admin, please get one of your Coordinators to contact [Hub Group Support](#) on Mattermost, or email [tech@rebellion.earth](mailto:tech@rebellion.earth).

# SOS Facilities on the Hub

This section describes how the Hub helps to implement the principles of [Self-Organising Systems](#) within XR UK. We'll show how the External Coordinator Role in a group, or circle, can be linked to a Representative Role in the parent group, or supercircle. We'll also show how Mandates for Working Groups need agreement with their supercircle.

## Hub Groups and SOS

Our [Organism diagram](#) shows all the groups/circles on the Hub, and how they fit together within our self-organising structure.

The Hub is used by lots of different kinds of groups/circles, and some have decision-making power, so our **Constitution** says these should each have a [Mandate](#). The **Mandate** details the group's **Purpose** (the result the group is trying to bring about), **Accountabilities** (what the group's jobs are) and **Domains** (resources that the group controls).

The decision whether to follow the Constitution rests with the groups at the outermost level of the Organism – the UK Rebel Hive (for UK Working Groups), the Regions and Nations, XR Youth, etc. Together with the Hive, many of the Regions and Nations have decided to adopt the Constitution. XR SOS will inform the Hub which groups have made this decision – if you are uncertain whether your group has adopted the Constitution, please contact your Hub Admin or [DDAT \(Digital Discussions Applications Team\)](#)).

Once a group has adopted the Constitution, then new Working Groups and Roles under that group **must** decide on and publish, via the Organism, a Mandate which contains a Purpose, as a minimum, but ideally Accountabilities too. This applies at all levels – thus every UK Working Group must have a Mandate, no matter how deeply nested it is within the structure. For Regions/Nations, this applies only to Regional Working Groups and District Working Groups. It isn't enforced to Local Groups (or their working groups) because most Local Groups are not large enough to need SOS – but they can still have a Mandate if they want to.

## Linked Roles

Within XR, it is often necessary for a group/circle to be represented in another circle. The classic example of this is the External Coordinator in a circle who will normally be linked to a Representative Role in the parent/supercircle. In this case, the Linked Role represents the subcircle in the supercircle and, in addition, the supercircle holds the subcircle's Mandate.

Linked Roles can also be used between any 2 circles in the Hub, such as:

- Some regions have an Anchor circle or Local Group Coordinator's circle. They can link the External Coordinator role in each of their Local Groups to a role in the Anchor Circle.
- There is often a need for cross-group collaboration – Arrestee & Legal Support (A&LS), for example, has a rep who attends Actions meetings, to appraise A&LS of forthcoming actions, and to advise the Actions circle on arrest issues.

The Hub organises these roles so that someone joining the Linked Role in one circle is automatically elected to the Linked Role in the second circle – and joined to that circle, if they are not already a member. Linked Roles appear with a yellow border in the **XR Organism** diagram.

Note that when someone leaves a Linked Role in one circle, they are automatically removed from the Linked Role in the other circle. The Hub also offers to remove them from membership of the other circle (this is optional).

## Which Hub Groups implement SOS?

There are many different kinds of Hub Group: the Rebel Hive contains the UK Working Groups, and their sub-circles (Child Groups). Regions and Nations have their own Working Groups, together with District and Local Groups, which again can contain working groups. While all the groups/circles within the Rebel Hive are subject to SOS, only the Regions/Nations that have adopted the new Constitution are obliged to implement SOS, and that are only **above** the Local Group level.

There are also groups where SOS doesn't apply, because they do not make decisions on behalf of the movement, including:

- Affinity group – small groups of people supporting each other and working to achieve XR's goals. These groups are most often used for organising actions. By organising as many small groups pursuing a shared vision, we avoid getting too bogged down in slow decision-making processes
- Community group – a group for rebels to connect and work together through communities of shared self-identity rather than of shared location (for example, faith, profession, ethnicity and sexual identity)
- Role support group – groups that provide help and mutual support to people in a certain role in other groups
- Connected group – a permanent ongoing group that does not have a mandate. Connected groups are autonomous and operate independently outside of Hive circles. They may have a Linked Role to a UK circle but are not allowed decision-making power in that circle. Decision-making power requires accountability. In order to be accountable, you need a mandate that the parent circle has consented to
- Project group – a group with no decision-making capability, which therefore is not required to have a mandate. Any decisions have to be made by another group that has the mandate to make them

- Local groups and below in Nations and Regions

## Hub Groups where SOS is enforced

Before editing any Hub Group, make sure to check the status of the relevant **Enforce SOS** tick-box. If this is ticked, then SOS rules must be followed. Thus, creating a new New Child Group for an SOS-enforced group will require a Mandate to be entered before the Child Group can be created, unless it is one of the groups included in the list above.

## Adding Linked Roles

To link a role in one Hub Group with a connected role in another group, you must be a Group Admin of both groups, or you need to be a Hub Admin. With that in mind, from the Hub Group page, select **Roles** to display all the group's roles. Select the Role you wish to link to reach the following page:

image\_1681221401436.png

Click on the dropdown **Role Holder represents this group in**, and select the group you want to link the role to. The top entry is the current group's parent, as that is the one most often chosen. The remainder are in alphabetical order. To unlink a role, just select the blank entry.

When you have selected the entry, the Linked Role field below will be filled in with a pre-set value – usually a role name that includes the same name as your group. However, you may change that by either selecting one of the existing role names in the other group from the dropdown, or by typing a new role name that describes the nature of the link.

## Default Roles are created by SOS

A set of important **Default Roles** has been created by SOS. These include External Coordinator, Internal Coordinator, Group Admin, etc. Hub Admins can edit these Default Roles, but they should only be changed with the permission of SOS. Click the XRGroups>Hub Group Name>Roles>Default Roles buttons to see the following listing:

Default\_Roles\_List\_01Feb22.jpg

Group Admins selecting a new role can choose from these Default Roles to get a role prefilled with a standard purpose and accountabilities.

If the tick-box under **Standard** is ticked, then any new Child Group being created will get each one of these Standard Roles automatically.

## Bulk Update (Hub Admins)

If you have made a change to a Default Role, you can bulk update selected Hub Group roles to make the same change to them. You should only do this if you have a mandate to do so (usually from SOS).

Click the **Bulk Update** button (either when editing a default role, or on the list of default roles) and you will see a list of all the changes that have been made.

Pick one, and you will see a summary of the changes made. Now choose which groups to apply the change to – you can choose a specific Hub Group Type (default: UK Working Group) and/or a Root Hub Group (default: UK Rebel Hive). Only groups that are descendants (subcircles, sub-subcircles, etc.) of the chosen group will be changed.

If you are making a change to a role (rather than an accountability), you can also choose whether to only change roles where the previous values match.

When you click Save, all the corresponding roles in the selected Hub Groups will be updated to match your change.

# Setting up a New Group on the Hub

This document takes you through the process of **creating a new group on the Hub**.

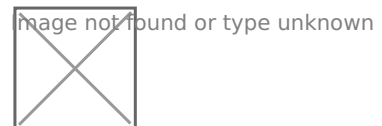
See also [Good Practice Guide](#)

## Creating a New 'Child' XR Group

If you are part of a large organisation which has numerous working groups (e.g. a large working group like **Communities**, you may have a number of large and separate working groups, for example: 'Mass Mobilisation', 'Regional Development', etc.). If this is the situation for your circle, you can create separate **Hub Groups** for your working groups on the Hub, alongside new services that group provides.

[image\\_1688635443159.png](#)

To create a new group, go to your group in **My XR Groups**; click the **New Child XR Group** button. Alternatively, click on the '**New Child Group**' green font option via the '**My Groups\Admin**' option from the grey menu bar along the top of your window. (See image above)



This shows the first page of the new group **wizard** (a support tool):

Name your new group, then add a short name. This is used as a prefix to channel and forum names, to distinguish them from other groups' channels/forums.

Select **which Hub Group the new group relates to** (NB you have to be its Group Admin to do this). For a subgroup, this will be the parent group.

Decide if the new group is a subgroup (e.g. a Working Group which is a subcircle of the group above) or an independent group (e.g. a new, nationwide Campaign Group which isn't run by an existing UK Working Group).

Click '**Next**'.

image not found or type unknown



**Group Category.** Now you can choose what **type of group** to create. (See the image above for options)

If you create a subgroup, you can create a **linked role**; here, the External Coordinator of the new group represents the child (sub) group in the parent group.

**SOS principles** suggest that a new working group is created when a role becomes too much for one person to handle; the work involved needs a group of people to work on a project or new work stream. The **existing role holder becomes External Coordinator of the new group**, inheriting the mandate. The parent group defines the mandate of the new group in collaboration with the new team.

**New or Pre-existing Tasks** There are **two choices** here:

- If you are creating a new group to **fulfil an existing role**, then select the **role in the drop down**.
- If there is **no existing role**, just leave the **dropdown unchanged**; a new role is created in the parent group with the same name as the new child group.

Click 'Next'.

image not found or type unknown



**New Group Purpose**(See above image) Now you explain the **Purpose of the new group**. If it is a group that can (or must) have a mandate, you add this here. If the group may not have a mandate (e.g. a **Project Group**), you will only be asked what the group is for.

Click 'Next'.

image not found or type unknown



**New Roles and Role Holders.** Now you can choose which of the core roles to create and who will be in them. These role holders are selected from members of the group you are group admin of in the first page.

Click 'Next'.



**Services** Finally, you choose what **channels**, **forums** and **cloud folder** to create.

Click 'Save' when done.

**Note you can only have one new Hub Group pending at a time.** If you try to start a new one when you already have one which hasn't been created, you will just be editing the existing form!

Once you have filled in the form, your new XR Group will have exactly the same kind of facilities as any other Hub Group, i.e.: channels on Mattermost, security groups and forums on UK Forums. Optionally a separate file storage area can be created on the UK Cloud.

People in the new group are not automatically also in the parent group. However, you can invite them to be in both, if your group agree. This requires discussion. If the parent (or any ancestor) group has **Invite All Members Of Child Hub Groups** ticked, they will be invited automatically to those groups. N.B. Invitees do not have to accept membership (for example, if already over-committed).

This allows your group to have private discussions and files, (if required), which are not automatically seen by the parent group, or other working groups.

## Already Have a Mattermost Team?

If your group is already on Mattermost (but not on the Hub), **it is very important that you let DDAT crew know**, so that we link the Hub to your existing team. **Contact DDAT** Tell DDAT what your team is called, and which channels you want people to be joined to automatically.

You must give **xrukadmin** (the Hub's login) admin access to your team, so the Hub can add people to it. You can only do this using a web browser or the PC app to connect to Mattermost; the phone apps do not have all the menu options.

The procedure is:

- Go to your team.
- Click the bar menu, 'Manage Members'.
- Click 'Invite People'.
- Type 'xrukadmin' in the 'Add' or 'Invite' people box.
- Go back to 'Manage Members'.
- Find it in the list; use the drop down to make it 'Team Admin'.
- Then go to each channel, to join 'xrukadmin' to each one.



You also need to join **xrukadmin** to **any channels you want your members to be joined to automatically by the Hub**. If you do not do this, the Hub cannot join people to your team and channels.

When the admins actually create your Hub Group on the new services, you will receive an email telling you this has happened. The next time you log in to the hub, your accounts on the new services will be set up for you automatically, so you can start using them.

## Want a New Mattermost Team?

It is recommended that you use the same team as your parent (for local groups this will normally be the regional team). This is so your group can easily interact with other groups in the region.

**Teams on Mattermost take significant resources on the server.** You should only ask for a new team if your group is large, and will have many subgroups, each with their own channels.

Only the Mattermost admins can create Teams on Mattermost, so you need to DM them **@xradmin** and **@xradmin2** to ask for a new team. The team name must not clash with an existing team, (especially in terms of mandate overlap or repetition). The group name must be between 2 and 15 characters long. Once this is created, please follow the instructions above in **If you already have a Mattermost team**.

## What Next?

Read the **Group Admin Guides** for how to invite people, add new forums and channels, etc.

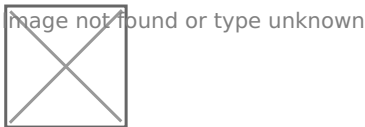
# Deactivating or reactivating someone's account

This page explains how to deactivate an account if someone is arrested or loses their phone or other device used to access our services. **Group admins** are able to deactivate their account.

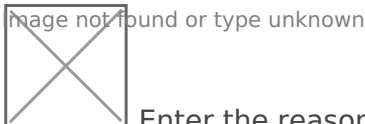
See [Compromised Account Procedure](#) for precautions to take when access to an account is compromised.

## Deactivating an account

Find the person whose account you're looking to deactivate by going to your group, opening the Members dropdown list and clicking on the person.



Click on the green **Deactivate User** link.



Enter the reason for deactivating the user, and click **Yes**.

The user will immediately be removed from all UK private teams on Mattermost, and their accounts on the Hub, Forums and Cloud will be deactivated. A message will also be sent to the global Mattermost admins asking them to deactivate the Mattermost account.

If the user has a vault account **for the same email address** as they currently have on the Hub, it will also be deactivated.

## Reactivating an account

**Do not reactivate the account of someone you do not know personally.**

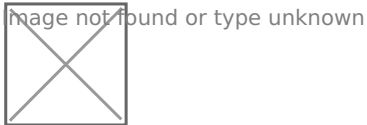
And, of course, make sure :

- They really have been released, and have all their devices back

- Their email address has not been compromised

If in any doubt, do not reactivate until their email address on the Hub and all other services has been changed to a new, uncompromised address. To do that, obtain their current Mattermost password, and ask your regional Hub Admin, or request in the [Hub Help Desk](#) on Mattermost.

Follow the same steps as outlined above – where previously the link would have said Deactivate User, it should now say **Reactivate User**. Clicking this link will bring up the confirmation screen:



Click **Yes** to reactivate them. The user will immediately be rejoined to all their UK private teams on Mattermost, and their accounts on the Hub, Forums and Cloud will be reactivated. A message will also be sent to the global Mattermost admins asking them to reactivate the Mattermost account.

If they are a member of Mattermost channels which the Hub does not know about, their membership of those channels will not be restored automatically. They need to rejoin them "by hand", by asking people in the channel to join them again.

If the user has a vault account **for the same email address** as they currently have on the Hub, it will also be reactivated.

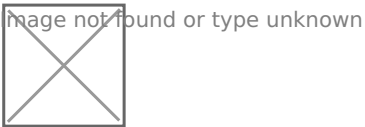
# How to create and use Forms on the Hub

The Hub allows Group Admins to create forms for people to fill in, and then look at (and share) the results.

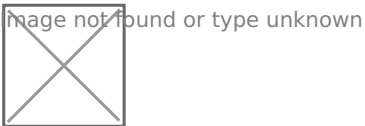
## Creating a form

From your group's page on the Hub, click **Forms** in the **Admin** area.

You will see a list of forms that looks like this:

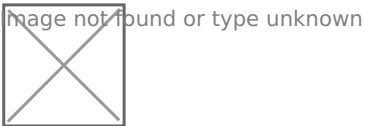


Click **New Form** to go to the form design page:



Give your form a name. All your group's forms must have different names.

You can decide who is allowed to fill in your form from the drop-down list



Leave it as Hidden until you have finished creating it - you can make it Hidden again when you don't want people to fill it in any more.

## Adding fields

Each field on the form has a (unique to that form) name. The name must have no spaces or punctuation. WeUseCamelCaseLikeThis to make field names with more than 1 word in them. (The

Hub will remove spaces and CamelCase the name for you if you forget. Camel because of the humps!) Fields can be Headings (just to instruct or separate parts of your form), or any of the types below:

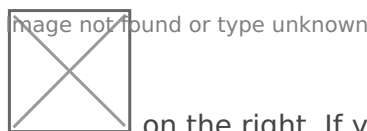


The field type determines what the user can enter in the field. If you change it later, data may appear to be lost - e.g. if you have a text field which someone enters "hello" in, and you change it to decimal, "hello" isn't a number, so it won't be displayed. But, if you change it back again, the data will reappear.

By default the prompt for the field will be the name, Un Camel Cased - e.g. the name **PreferredPronoun** would be prompted **Preferred Pronoun**). The name is important, because any data entered into the field by users is stored against that name. If you change the name, any stored data for the original name will be lost.

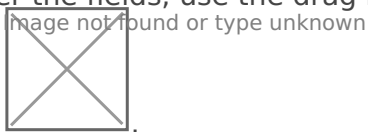
Each time you start entering a new field, another space to enter the next new one will appear.

If you want to reorder the fields, use the drag handle



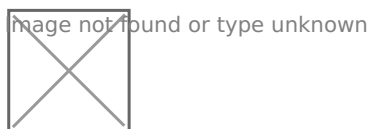
on the right. If you want to remove

a field, click the red

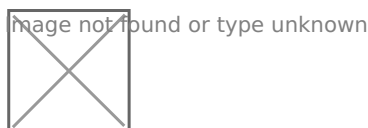


button.

Here is an example form:



When people are filling it in, it looks like this:

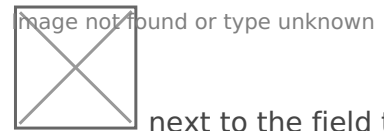


As you can see, there are issues with the camel casing when there is more than one capital letter together. And the form is very boring to look at. We can fix that, though.

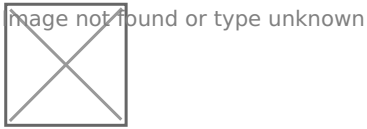
## Changing the styles of fields

Each field has a Style dropdown. A number of standard styles are provided (taken from the [XR Style Guide](#)). You can add your own styles if you know [CSS](#) - there is a **Form Styles** option on the

main Forms list (see above).



There are more options you can add to fields - click the edit pencil next to the field to see them:



Here we have given the introduction heading a lemon background, and added some explanatory text about the form.

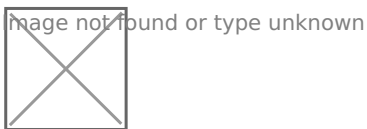
The Heading field lets you change the prompt for the field (so it isn't UnCamelCased from the field name) - a good way of fixing names with two or more capitals together, and also a way of changing the prompt but keeping the data people have already entered.

The Hint field shows a standard Hub pop-up hint question mark - if the user clicks on it, the hint pops up.

The Preamble appears above the field. You can use **Markdown** formatting here, just like Mattermost.

The Postamble appears below the field.

Here is the form again, with some of those changes applied:



You will notice that, as well as the usual Save button in the form editor, there is an Apply button. This saves the changes, but leaves the form editor open.

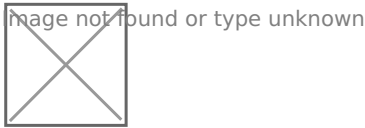
When I am tweaking the design of forms, I usually open the form editor in one tab, make the form visible to group members, and click Apply. Then I open the form to enter data in another window, so I can see what it looks like. I can switch back to the edit tab, alter stuff, and click Apply. Then I switch to the form entry tab and refresh it (**F5** usually works) to see what the changes look like.

# Inviting people to fill in a form

There are three ways of inviting people to fill in a form:

# Inviting individuals

Click "Invite people" when editing a form to ask people to fill in the form. You can also do this from the Forms tab in your group page. The invite screen is a bit like the form to invite people to your group:



Fill in email addresses, login names, or Mattermost handles, one per line.

If you want to customise the email that is sent, change the text - but make sure you leave `{Link}` in the text - this will be replaced with a url for the user to click on to fill in the form.

When you click save, each person will be sent their own, personal link to fill in the form.

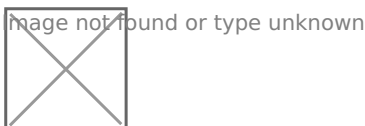
## Making a generic invite anyone can use

When you are editing a form (or viewing the form in the list of forms), there is a link field. This is a link to the generic form invite. Right click it (long press on a touch screen) and copy the link.

You can publish this link, and anyone who clicks on it is taken to the Hub. If they are logged in (and have permission to enter data to the form - see Visibility above), they are taken to the form, ready to enter data. If they are not logged in (and the form is visible to the public), they are asked for their name and email address, and a link is emailed to them. (This two-stage process ensures that the person filling in the form is really the person with that email address.)

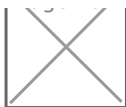
## People on the Hub can fill in the form from your Hub Group page

If you have forms that are visible, they will appear in the Forms tab on your group's Hub page:



If a form is for group members only, it will only appear if the person is a group member. They can click on the green link to enter their data into the form (or go back and change it later).

Group Admins can see the other icons -



to add a new form,



to edit it,



image not found or type unknown



to see the data and to invite people.

## Looking at the data

When editing a form, the Form Data option shows you the form data. You can also do this from the Forms tab in your group page. You will see the field headings across the top, and one row for each person who has filled in the form. Group Admins can click on any row to see the data (and even change or delete it). The data is searchable, and you can sort by clicking on the column headings. You can also download the data using the Download button - maybe to add it to a spreadsheet or other package, to further analyse it.

## Sharing the data with others

By default, only Group Admins can see the data. But, using the Share results option in the data or form screens, you can share the form data with any role on the Hub. This might be a role in your team that uses the data (so you don't have to make them Group Admin to let them see it), or a role in a different hub group (where the data needs to be shared with another group).

When you share the data, you can choose whether to let people in each role see the email address and/or Name/Handle of the people filling the data in. This helps you to be GDPR compliant, not sharing personal information to people who don't need it. (But, if you add a field to your form which contains personal data, they will be able to see that, so think carefully about who you share that kind of form with.)

If you share the data with a role, anyone in that role can go to your group page, look in the Forms



tab, and they will see the data icon against the form name, and can click on it to see the data in that form.



# Behaviour and Good Practice

## General responsibilities of Group Admins

- Group Admins have a responsibility to make sure that the Hub and communication platforms are being used correctly and responsibly by members of their Hub Group. This document describes some 'best practices' that you may find helpful.

## The Hub

- You should use the Hub to invite new people to your group. This is because an invite to the Hub sets people up correctly on all the new services.
- Your Hub Group Internal Coordinator should confirm the invitation before it is sent. This ensures that the new member is known to the Group and is, therefore, qualified to be invited.
- You can also invite people to individual services, but you have to do all the work the Hub would have done yourself (inviting people to the right Teams, Channels and Forums, for example), so it is much easier just to invite people via the Hub.

## Mattermost

- Remind users to adjust their Notification Settings so that they receive appropriate warning of posts addressed to them personally, or the channels they belong to.
- Advise users when and when **not** to use `@all` and `@channel`
- Consider mild warnings against duplicating the same post in multiple channels. Set up `Broadcast Only` channels for users to avoid this practice.
- Prompt users to make full use of the **Reply** function to link answers to specific posts.
- Recommend switching to **Forums** for longer-form conversations and remind users to **link** from the channel to any associated **Forum Topic**.

## UK Forums

- Encourage use of Forums by **using them yourself** and linking to Topics that will generate user interaction.
- Be supportive of Forum use by adding **replies** and **likes** to your user's posts. This will encourage them to contribute more to topics and feel more comfortable with the platform.

# UK Cloud

- Although it's not in your mandate to manage your Hub Group's **files and folders**, maintain oversight of what is being saved on the Cloud. You may recommend how files are to be named - for ease of comprehension - and how folders are to be organised. This should lead to improved efficiency of storage and ease of retrieval for your Hub Group's users.

## Discussion moderation

If you find any post that strays from the accepted guidelines, above, it's up to you to feed back your concerns directly with the originator of the post. If you do, then you should be sensitive with any language, but, as our regenerative statement says: "we have cultures of respect and listening, in which people deal with conflicts when they arise, feeding back quickly and talking about disagreements and issues without blaming and shaming."

If you find a post that needs moderation, reply directly to it and explain why you find it unacceptable and suggest, to the poster, a potentially more acceptable way of making their point, if that is possible. If the post requires removal, then remove it but you are strongly advised to leave an explanation of why you felt removal was necessary.

# How to set up a Telegram-Mattermost link

We have a **Matterbridge** service, which enables you to link a **Telegram channel** or group to a **Mattermost channel**.

The purpose of this service is to reduce the number of communication tools you have to use.

Rebels who are comfortable with Mattermost can keep in touch with Telegram channels, **without** having to join the Telegram channel.

Likewise, rebels who do not want to use Mattermost, but want to stick with Telegram can do so, **without** being in a Telegram only silo.

The link can be **one-way** or **two-way**. For instance, the Rebellion Broadcast and Movement Broadcast channels are **one-way**, from Telegram to Mattermost, where only the Telegram channel members and admins can post to it. Mattermost readers of Telegram channel posts may reply on the Mattermost channel but these posts are not subsequently passed to the Telegram channel. (NOTE: It is possible for Hub Admins to set a Mattermost channel to Broadcast Only, so people not in the Hub Group that own the channel have their posts removed every night.)

A group that has a thriving Telegram channel, with some people who do not want to use Mattermost, could set up a **two-way** Matterbridge link. This enables posts to be made **and shared** from either platform. Subsequently, members who **do** use Mattermost can **leave** the Telegram channel, whilst **remaining in** the overall conversation.

## Prerequisites

It is **very important** that people in the existing channel or group know **beforehand** if you intend to set up a link to or from Mattermost. You should discuss:

- whether it is one-way or two-way
- why you are doing it, and
- who will get access.

This prior consultation and agreement on how the Matterbridge link will improve communications within the group, will lead to a smoother introduction of the link.

# How to get a link set up

Contact [DDAT Team](#) on Mattermost, and ask the admins to set up your bridge. They will need the information detailed below, but they can help you with getting your end set up, if you find the following instructions difficult.

## What you need to do first

1. Carefully consider security - if you link a private Mattermost channel to a Telegram channel, then the content is available to anyone who can get in to the Telegram channel.
2. Get the Telegram channel or group administrator to join user "XRUKMatterbridge\_bot" (our bot) to the Telegram channel or group.

If it's a channel rather than a group, set the bot as Administrator - most of the admin permissions can be turned off - a Telegram->Mattermost link only needs to be able to **read** messages; a two-way link also needs to **post** messages. (NOTE: see section below for more detail).

3. Notify the [DDAT Team](#) that you have added the bot to your Telegram channel, and request them to set up the Matterbridge link. Include the Telegram channel or group name, the Mattermost Team and Mattermost Channel.

## Limitations

You cannot link the same Mattermost channel to two different Telegram channels or groups.

## How to add a bot to a channel on Telegram:

Desktop:

1. Open the desktop app
2. Go into the channel
3. ... menu, Manage Channel
4. Click Administrators
5. Click Add Administrator
6. Type the name of the bot ("XRUKMatterbridge\_bot")
7. Click on it to add
8. Click OK to add it
9. Turn off all the permissions (or allow posts if you want a two-way link)

## 10. Click Save

It works the same on a phone:

1. Open the app
2. Go into the channel
3. Tap on the title bar
4. Tap administrators
5. Tap Add Admin
6. Tap the search icon
7. Type the bot name ("XRUKMatterbridge\_bot")
8. Pick it from the list
9. Turn off all the rights (or allow posts if you want a two-way link)
10. Tap the tick at the top

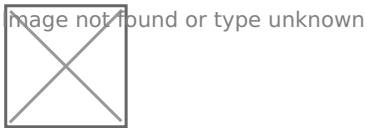
# Placeholder Hub Groups

Placeholder Groups represent groups who do not use the Hub, so that they appear in the Hub Circles diagram and can store their public-facing contact information.

## Creating a Placeholder Group

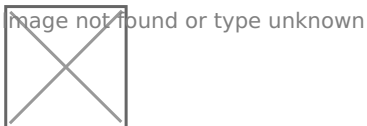
Only people with **Group Admin of All Groups** permission (or above) can create Placeholder Groups. This includes regional Hub Admins.

To create a Placeholder Group, go to the parent of the group (usually a Region, or maybe a District), and click **New Child Placeholder Group**.



Enter the name and short name, and select the group type (usually Local Group).

## Editing a Placeholder Group



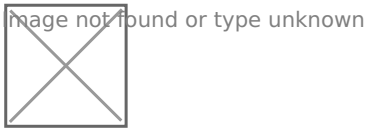
Open the **More Info/Contact Info** dropdown, and click the edit pencil to add contact information.

## What to do if the group wants to come on the Hub

If the group wants to come on the Hub, look for its trained Group Admin and then invite them to be Group Admin of the group. Then, when they look at the group on the Hub, they will then see the **Add to Hub services** button on the screen above.

If not, you will have to find out what they need on the Hub, and do it yourself – but they will need a trained Group Admin at some point, so the first option is preferred.

When the **Add to Hub services** button is clicked, this screen appears:



This is similar to the [New Group Screen](#), but with fewer options, and all on one page.

Once it is filled in correctly, clicking Save should create the group on the services right away.