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</table>
Organization

The JForum Discussion & Private Messages tool allows you to communicate asynchronously with your site participants and privately through the built-in private messaging component (to be covered later in this module).

There are four parts to the organizational structure of the discussion tool:

1. Categories
2. Forums
3. Topics
4. Replies

Categories include forums that fall under similar themes. For instance, a facilitator (site owner/administrator) could have a category called Group Work. Within the Group Work category, there might be forums titled Group A, Group B, and Group C. And within each of these forums there would be topics for each group and replies to those topics.

By default, you will have one category in your site's discussion tool: main. The "Main" category contains two forums, Questions & Worksite Discussions. There is nothing special about the default categories and forum names. You can change them to fit your unique needs.

There are no topics in your forums when you get a new collaboration site.
Navigation

The home page for the Discussion & Private Messages Tool is considered the "Discussion Home" area. As you navigate through your forums and topics, you can return to home from any page of the tool by click on "Discussion Home" or "Discussion List."

As you click on forums, the software will build a navigation menu (breadcrumbs as shown in the image below), showing you the path you've taken. For instance, if you click on the **Worksite Discussions** Forum, the breadcrumbs show you where you are. The title of the forum you are at is displayed as well.

The menu bar and Discussion List navigation menu is accessible from all screens. No matter where you click (Recent Topics, Member Listing, Private Messages, etc.), you can return to the list of forums by clicking on Discussion List or Discussion Home.

You may also navigate in between forums by using the drop-down menu at the bottom of the Discussion forum pages. This is especially useful if you have finished reading a topic and its messages and you are at the bottom of the screen. It saves you time from scrolling back up to the top menu.

Finally, take a moment to study the legend above explaining the different types of icons used to highlight functionality, such as new, blocked messages, etc. Hot messages refers to messages that have had heavy dialogue and have reached to maximum number of replies to be considered hot (default is 20).
Member/Observer View

When participants first visit the site's discussion tool, they will see the Discussion List.

If you didn't change the default forums, when members (site participants) visit the discussion tool, they will see:

Site owners (facilitators) can add new forums to the existing list, or remove the default forums and create new ones for their discussions, as in the following example. Note that members can see at a glance where new activity is (orange folder), how many topics and messages (replies) are in a forum, as well as who posted the last message and when. Clicking on a user's name will bring up their profile; clicking on the letter icon will take the user to the actual message.
The default forums are public, meaning that anyone who is a "Participant" (member or observer) or "Facilitator" (owner or administrator) can read and respond to messages. You can set up restricted forums for groups (we'll cover this later).

### My Profile

The discussion software allows you to set your preferences under My Profile. Some things to remember:

- You set your preferences once, and your profile settings are visible in all worksites using the Discussions and Private Messages tool.

- If users have not set any preference in their profile, only their name will be listed and a link to Private Messages.

- Setting profile preferences is optional.

- Preferences users choose to complete will appear under their profile link by their posts.

- Discussion list members can view others' profiles by clicking on a user's name and under Member Listing.

When clicking on a user's name anywhere in the discussion tool, or on the Profile icon in
a user's post, site participants will see a snapshot with user preferences:

<table>
<thead>
<tr>
<th>Avatar</th>
<th>All about Karl Peter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Registration date: 11-05-2005 18:57:16</td>
</tr>
<tr>
<td></td>
<td>Number of messages posted: 42</td>
</tr>
<tr>
<td></td>
<td>Website: <a href="http://www.fothill.edu/bio/programs/vettech">http://www.fothill.edu/bio/programs/vettech</a></td>
</tr>
<tr>
<td>Karma: five stars</td>
<td>Occupation: Veterinary Educator</td>
</tr>
</tbody>
</table>

Information from My Profile is used to display some basic information by a user's post:

Additionally, site members can see the total number of topics a user has posted. The total number of messages a user has posted in the discussion forums of a site is also displayed in a user's snapshot (accessible by clicking on a user's name/link) and in Member Listing (column with total messages for users).

**Setting Your Profile Preferences**

To set your profile preferences, click on My Profile.
Default User Registration Information

First, you will see your "Registration Information." You cannot change this information here. Your account information can be changed by you in one central location, under MyWorkspace >> Account >> Modify. If you change your account information in the system, the changes will be reflected here as well.

Next, you can set "General Information about yourself."

**General Information About Yourself**

This is optional, but if you set it, this information will appear by your posts. Try it. If you don't like what is displayed to other site participants, you can come back and change your profile. Your changes will update all references of your profile in all sites where you are a member and have posted topics and messages.
Note that you can complete as many or as few fields as you want to be viewable by other members of the site.

Here is an example that shows a user who included her IM information, etc. Once included in My Profile, this information appears in every topic or message a user posts.

<table>
<thead>
<tr>
<th>General Informations about yourself</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ICQ UIN:</strong></td>
</tr>
<tr>
<td><strong>AIM Info:</strong></td>
</tr>
<tr>
<td><strong>MSN Messenger:</strong></td>
</tr>
<tr>
<td><strong>Yahoo Messenger:</strong></td>
</tr>
<tr>
<td><strong>Web Site:</strong></td>
</tr>
<tr>
<td><strong>From:</strong></td>
</tr>
<tr>
<td><strong>Occupation:</strong></td>
</tr>
<tr>
<td><strong>Interests:</strong></td>
</tr>
<tr>
<td><strong>Signature:</strong></td>
</tr>
</tbody>
</table>

This is a text block that will be added to your messages’ end. Optional, limit of 255 chars

-- Vivie
"Take risks and be prepared to get into trouble." - James Watson

Setting Your Preferences

Go through the list, and set your preferences. Again, remember that these settings are global. They define how the discussion software will handle discussion email notifications, show signature, show email address, etc., in every discussion board of which you are a member.
Including Avatars

Finally, you can upload or link to an image that you'd like to use as an avatar. This image will appear next to your post. Before uploading an image, please resize it so that it an appropriate size. 130 X 130 pixels or smaller is recommended. You can always return and remove an avatar or replace it with a new one.

When you are finished, click on "Submit" at the bottom.

You can always come back to changes your Profile settings. They will be changed globally in all sites where you are a member of a discussion tool. If you have posted messages in forums, your adjustments to your profile will be updated in your posts, member listing information, etc. in all the sites.

Member Listing

You can view and contact any active member of a site by clicking on Member Listing on
the top menu bar. As the purpose of Member Listing is to communicate and collaborate with other members of a collaboration site, only "active" users are listed.

- Click on a member's name to access their profile.
- Click on PM by a member's name to send them a private message in the system.
- Click on the Email icon next on a user's row to send them an email (available if set in MyProfile)
- If provided in their profile, you can see where a member is from.
- Registration date refers to the date and time when a user first logged into the discussion tool.
- Messages refers to the total number of messages that a user has posted in the discussion tool (site aware).
- Karma refers to the average rate a user's posts may have received by other members of the site.

If a user is a guest, registered just with an email address, and has no first or last name in the system, he or she will be shown as "Guest." Once the user edits her/his account under MyWorkspace, the next time he/she logs on, their full name will be displayed instead of Guest. Likewise, if a user modifies his/her information (first/last name or email), the changes will take affect in the discussion tool next time a user logs back onto the site and
in Member Listing.

**Private Messaging**

The discussion tool comes with integrated private messaging functionality.

Members have the ability to send private messages (PM) to any active site participant.

Upon entering the discussion tool, users can see immediately if they have any new messages. The number of unread, new messages is shown in parenthesis at the top menu bar.

The Private Messages area comes with an Inbox and a Send Box. The Inbox includes all the messages that came in from other users, and the Send box saves copies of the Private Messages that you send to others. Upon clicking on Private Messages, any message that is unread is highlighted in orange.
If you are in your in-box within Private Messages and want to send a message to a user, click on New Topic and find user.

Other features include the ability to:

- Delete private messages. Simply check the boxes of the messages you want to delete and click on "delete selected."

- Post a reply to a private message. Click on Post Reply

- Reply with quote to a private message. Click on the Quote icon once you open the message.

If your preferences are set to "yes" in your profile, you will get an email notification when you receive a private message.

**Sending a Private Message**

- Click on Member Listing

- Click on the PM icon next to the user's name that you want to send a private message to.

Note: If you are in the discussion forum and you want to communicate privately with a user, click on the PM icon located on the window of their post. This is critical in sharing aside or off-topic notes with others, or communicating information that would not be appropriate to post publicly.

When you click on PM, you get the following New Private Message window:
Reading Topics

As mentioned earlier, users can see at a glance where new activity is (orange folder), how many topics and messages (replies) are in a forum, as well as who posted the last message and when. You can see where recent topics have been posted by the color of the forum folders. If there is new activity in a forum since your last visit, its folder will be highlighted in orange. Upon clicking on the forum, the new topics or topics that have new replies will also be highlighted in red.

<table>
<thead>
<tr>
<th>Discussions</th>
<th>Topics</th>
<th>Messages</th>
<th>Last Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Icon] Student Lounge</td>
<td>0</td>
<td>28</td>
<td>11-12-2003 12:12:46 Vive Shou</td>
</tr>
<tr>
<td>![Icon] Questions</td>
<td>31</td>
<td>110</td>
<td>No messages</td>
</tr>
</tbody>
</table>
You can access and read topics and messages in many ways:

• You can read a topic by clicking on the Forum titles, and then clicking on the title of the Topic.

• You can click on the letter icon by the last poster's name.

You can access and read topics and messages in many ways:

• You can read a topic by clicking on the Forum titles, and then clicking on the title of the Topic.

• You can click on the letter icon by the last poster's name.

Note: Clicking on a user's name next to their post will bring up their profile.

Reading Recent Topics from all Forums

The most efficient way to view and read new topics in any of the discussion forums is by clicking on Recent Topics. You will get a list with topics that have been posted in chronological order, with the most recent first. Topics that are new since your last visit will be highlighted in orange.

• Click on the title of topic to read it and all the replies below it.

• Or, you may also click on the icon next the person's name (under Last Message) to go directly to the last post.

• Click on Recent Topics again to return to the list and proceed to the next.

• When done reading and replying to all the new topics, as needed, click on Mark All As Read (see menu bar).

Important Step: The last step above is critical to keeping up with conversations and not
getting overwhelmed. In order for you to see new activity in orange when you return to
the discussion tool, you must click on Mark All As Read after you read the new
conversations, and prior to logging out of the system.

Posting New Topics

Unless you have made a forum "Read Only" or "Reply Only," participants can initiate
conversations. They can post new topics. To create a new topic within a forum, follow
these steps:

1. Click on the forum where you want to post a topic.

2. Click on the New Topic image (available at the top and bottom of the forum
   screen)

3. Fill out the form that appears...

   | TOPIC TYPE: This refers to the nature of your topic. The default is set to
   | normal. Facilitators can also post "sticky" (anchored) and "announcement" topics
   | -- both of which will be displayed at the top of the forum's topics list. Members
   | (participants) can only post "normal" topics. SUBJECT: Try to type a very short,
   | but descriptive subject line. MESSAGE: Place the body of the message in the text
   | area. HTML formatting is allowed in the body by default. EDITOR: The editor is
   | quite robust and allows for many formatting and editing functions.

Attachments: User may attach documents to your message. See "Attach Files" button at
the bottom of the screen. File size and types of attachments are set by the system admin
for the server. By default, the software allows for any type of attachment. The default
upload limit is 1 GB. And, you may upload up to three attachments when posting a topic.
After you attach files, you must click on "Submit" to post your message with its
attachments. Preview: There is no preview available at this time. However, remember
that participants can edit their own topics or messages at any time. Submit: This will
post the new topic to the forum.

There is no reset button. To cancel your operation, just click on the Back button of your
browser, or the Discussion List or Discussion Home links at the top of the forum. If you
don't click on Submit, your topic won't get posted.

Once you post your message, you will be taken back to the forum you were posting to and you will see your topic posted.

## Replying to Topics

Post a reply is ideal when you post a reply (message) to the original topic (top level) of the thread where a forum member asked a question. You are simply adding your two cents, so-to-speak, to the discussion rather than replying to portion of a member's reply.

1. Click on the forum and then the topic you wish to reply to.

2. Click the Post Reply (located at the top or bottom of the forum). Your reply will be posted at the end of the topic. The original topic is listed first, and all subsequent replies are listed below it in chronological order.

### Quick Reply

You may also click on Quick Reply at the bottom of the screen to post a reply. This is very useful if you are NOT concerned about having formatting options, but you want to post a quick reply to someone and move on. The Quick Reply link gives you a small, plain window to compose and post a reply.
Here is a sample topic with a reply below it:

A topic with its replies is displayed as one web page. If the discussion gets too long, then
the software breaks it up into separate pages for easier loading and adds navigation links
at the bottom and on the forums listing page by the topic - as in 1 - 2 - 3 - Next.

The default number of posts to show per page is 20 but can be changed by the system
administrator.

Reply with Quote

Reply with quote is a feature located in the upper right corner of the message window. It
is absolutely critical to use [quote] if you are responding to a portion of someone's
message. This works very much like when responding to email and embedding comments
inline. You must remove the parts of the message that are irrelevant to what you want to
comment on, and leave just the phrase or sentence that you want to focus your reply on.
Be sure to leave the original message around the [quote=user] and [/quote], as in the
following example. Add your reply after the [/quote] tag.
After you post your reply, it will look like this:

Mary King wrote:

I am still not getting the message I sent to my shell on my personal email address. Is there some other tool I need to enable?

Be sure to check all your personal email accounts, including junk folders. Also, take a look under MyWorkspace >> Account >> Modify to ensure that you are trying to send email with the account you are registered with.

Whether you reply with quote or simply post a reply, your message will be posted at the bottom of the topic in chronological order. That is why it is critical that you use reply with quote if you want to address a specific comment so that it is framed in a border, helping others see what you are answering.

Tip:

Avoid asking NEW questions in the middle of topics. Add your comments to the topic by replying or reply with quote to address another member's ideas. You may post questions in the middle of the topic as long as they relate to the topic, ask for further clarification. Questions that ask opinions of new ideas or raise new issues will make the topic unfocused. This is not a threaded discussion forum. You may post questions in the middle of the topic as long as they relate to the topic.

If you want to ask a new question, somewhat related to a topic but not directly, start a new topic. You can do so in the forum’s home page.

**Editing & Deleting**

*Editing Topics and Replies*

You can edit any message YOU write. You have the ability to edit your own messages as many times as you choose. Facilitators have the ability to edit any message, as there may be rare cases where a participant’s inappropriate post should be revised.

To edit a message, click on **edit**.
Additionally, facilitators have moderation privileges that allow them to lock/unlock messages, move messages, and delete messages (covered later).

**Deleting Replies**

If you have a reason to remove a reply, click on the delete button located at the top upper right corner of a message. Please note that there is no undo! Once you delete the message, it is gone. It is not a good idea to delete messages, as they serve as a record and proof of what was said. If you must, edit a member's response.

Only facilitators have the ability to delete messages or topics. More about moderation options later.

**Moderation Options**

Admins and facilitators have the ability to manage topics: delete, move, lock, and unlock.

- You have the ability to lock topics once a discussion is over. Participants will be able to view locked discussions, but they will no longer be able to post. This is a great feature to encourage time on task.

- If you determine that a topic was locked prematurely, you can unlock it again for your site.

- If participants post a topic at the wrong forum, you can use move a topic and place it in the right location.

- You can delete topics that you no longer need. CAUTION: This will delete all the replies below a topic.

NOTE: If you want to delete a message/reply, you can click on the X icon of the topic itself.

To access the moderation options, click on the forum where you need to moderate topics,
and then click on Open Moderation Options:

Once you click on Open Moderation Options, you will see a list of the forum topics with check boxes next to them. Check on the topic (or topics) that you want to moderate, and then click on the appropriate button at the bottom (delete, move, lock, or unlock) to proceed.

Once you are finished moderating topics, click on Close Moderation Options link at the upper right corner (see image above).

**Locking a Topic**

Again, you have the ability to lock topics once a discussion is over. Participants will be able to view locked discussions, but they will no longer be able to post.
This is a great feature to encourage time on task. If you determine that a topic was locked prematurely, you can **unlock** it.

### Watch Topics

If you click on "Watch Tread" at the top of a topic, you will be notified via email when replies get posted. The email notifications will go to the email address that you are registered with in the system. This is a useful feature if you want to keep an eye on a discussion that might otherwise get buried.

If the topic gets too much traffic, and the email notifications are getting out of hand, polluting your in-box, you can turn it off by click on "Unwatch" topic.

You will be given a confirmation screen with the status of your request. You will no longer receive email notifications.

### Bookmark Topics

Site participants have the option to bookmark topics that may be of interest to them and wish to save or revisit regularly. To bookmark a topic, click on a forum where the topic is
located, and then on the actual topic. Click on the link name "Bookmark It!" located at the top right corner of the thread.

To view your bookmarks, click on My Bookmark at the menu bar. Bookmarks are site aware; you can only see the bookmarks you have saved by site. In the example below, the user has saved three bookmarks. Participants and facilitators have the ability to save bookmarks under My Bookmark.

Note that you can delete the bookmarks or edit their title and descriptions (Action links located on the right of the bookmarks).

**Search Topics**

The discussion tool allows you to search for topics.

Accurate word(s) must be provided. Partial words will not return information. Enter the search terms and select "search all items" if the string must be matched or select "Search
any term, or as is written" if any of the terms included should be matched and the condition does not require that all are found.

You can limit your search to one forum or one category if you want to narrow down your search.

Finally, you can choose how the search results are listed: by date, author, or forum and in ascending or descending order.

Here is an example of search results for "Email Archive" by author in ascending order from all the forums.

<table>
<thead>
<tr>
<th>Forum Name</th>
<th>Topic</th>
<th>Answers</th>
<th>Author</th>
<th>Views</th>
<th>Last message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module 7 - Email Archive</td>
<td>How Email Archive Works...</td>
<td>0</td>
<td>Karl Peter</td>
<td>4</td>
<td>11-12-2005 08:34:30 Karl Peter</td>
</tr>
<tr>
<td>Module 7 - Email Archive</td>
<td>How Email Archive Works...</td>
<td>0</td>
<td>Karl Peter</td>
<td>7</td>
<td>11-12-2005 08:34:54 Karl Peter</td>
</tr>
<tr>
<td>Module 7 - Email Archive</td>
<td>Email archive</td>
<td>1</td>
<td>Kathleen Dawson</td>
<td>10</td>
<td>11-12-2005 14:25:23 Suzanne Floyd</td>
</tr>
</tbody>
</table>

**Category & Forum Management**

**Category Management (Facilitator Tasks)**

To manage the categories of your discussion tool, click on Manage and then on Categories. You can...
• Insert New Categories

• Edit the properties of a category (title and description)

• Sort the order of the categories.

• Delete a category if NO forums are in it.

Note: You cannot edit forums from the Categories Management screen. Forums are listed for your convenience, however, so that you can see quickly what forums you have included under each of your categories. Depending on the themes covered in your course, you may not need many categories.

**Forum Management**

To manage the forums of your discussion tool, click on Manage and then on Forums. You can...

• Insert New Forums

• Edit the properties of a forum (title and description)

• Sort the order of the forums.

• Move a forum from one category to another (use Edit)

• Delete a forum (**CAUTION**: All topics under it will be deleted! No recovery!)

Here is an example of several custom forums under a "Main" category and a couple under "Other."
To see your newly created or revised forums, click on Discussion List to return to the student view of the software.

**Group Administration**

By default, two groups are part of the discussion tool: Facilitators and participants. Facilitators are typically facilitators and participants are members and observers.

Participants have default permissions that allow them to post topics and replies and edit their own messages. Facilitators also have default permissions that cannot be changed. They have admin privileges to do just about everything the system administrator does with the exception to changing server configurations.

The "roles" of the members of the discussion tool are determined by the system upon registration and cannot be changed by facilitators.

**Creating Custom Groups**

Facilitators can create custom groups with restricted access to forums of their choice, with special permissions or privileges. Additionally, facilitators can assign participants to any group at any time. For example, you might want to create a group called, "Leader." You might allow this group to post sticky or announcement topics, and give them the ability to "move" topics. Every student that you add to the Leader group will inherit the permissions of the Group.

To add a custom group, click on Manage >> Groups >> Insert New.
Other functions that you can perform include:

- Edit a group (edit its name and description).
- Delete a Group if no users belong to it (deselect the users from the group first in order to delete it).
- You may select one or more groups at a time by clicking on the check boxes and clicking on Delete Selected.

**Setting Permissions for Custom Groups**

To set the permissions for a group, click on the Permissions link at the row of the Group.
Site participants who belong to a group will inherit the permissions defined for it. Groups are site aware, meaning that they are designed for one site only and do not span across other sites. The permissions you set for a Group affect the participants of the site where the group is created.

**User Management**

To add users to a group, click on Manage and then Users. A list of all site facilitators and participants will be displayed, as in the following example:
Notice that the first few individuals do not have a "Groups" link by their names. They are facilitators. By default, facilitators have access to all the forums; therefore, they need not be added to any groups. To add a user to a group, click on the Groups link by his or her name.

A screen will appear showing the default group, participant, and any other custom groups that you may have created.

Select the Group that you want to add the user to and then click on Update.

**Netiquette Tips**

The following are some tips you'll want to share with your participants before beginning online communication.
1. Reply with Quote. If participants are responding to a particular paragraph or line within a longer text, they should quote that line or text within their reply for clarification.

2. Use spell check. Particularly for formal, graded discussions, encourage participants to use a word processing program to write the message, do a spell-check, then copy and paste the message into the discussion board. The Discussion tool does not have a built-in spell-checker. Follow latter technique.

Using Emoticons

Since we have no verbal ways of expressing ourselves in a virtual collaboration, consider using smilies to help clarify your meaning or to show the emotion behind your words. These "smilies" may appear silly, but participants use them extensively and can help avoid misunderstanding. When posting new topics or messages, you have access to a library of emoticons. Click on an icon to insert it in your text. Facilitators can upload additional emoticons under Manage >> Smilies.
Resources on Netiquette


- The Core Rules of Netiquette: [http://www.albion.com/netiquette/corerules.html](http://www.albion.com/netiquette/corerules.html)
Resources

The following resources on virtual communities, group work, and online discussion. You might want to explore them as time permits.


2. Nine Principles for Making Virtual Communities Work  
   http://www.wired.com/wired/archive/2.06/vc.principles.html

3. Maximizing the Well-Being of Online Groups  
   http://www.rider.edu/~suler/psycyber/clinpsygrp.html

4. Steps in Studying an Online Group: The Geezer Brigade  
   http://www.rider.edu/~suler/psycyber/geezerb.html

5. The Role of the Online Instructor/Facilitator  
   http://www.emoderators.com/moderators/teach_online.html

6. Moderating Discussions in the Electronic Classroom  
   http://www.emoderators.com/moderators/rohfeld.html

7. Keeping Online Asynchronous Discussions on Topic  
   http://www.aln.org/publications/jaln/v3n2/v3n2_beaudin.asp

Compiled by Vivie Sinou for the Cyber Teachers' Institute.

Modified by Trisha Gordon for U.Va.’s Collab environment.