Introduction

The EDUC Portal brings together all EDUC services and applications in one integrated ecosystem to support collaboration and daily work across the alliance.

The Portal continuously evolves through new integrations, including EDUC Catalogue and EDUC Learning.

This guide provides step-by-step instructions for accessing and using the EDUC Portal, from basic navigation to collaboration and productivity tools.

Access and initial setup

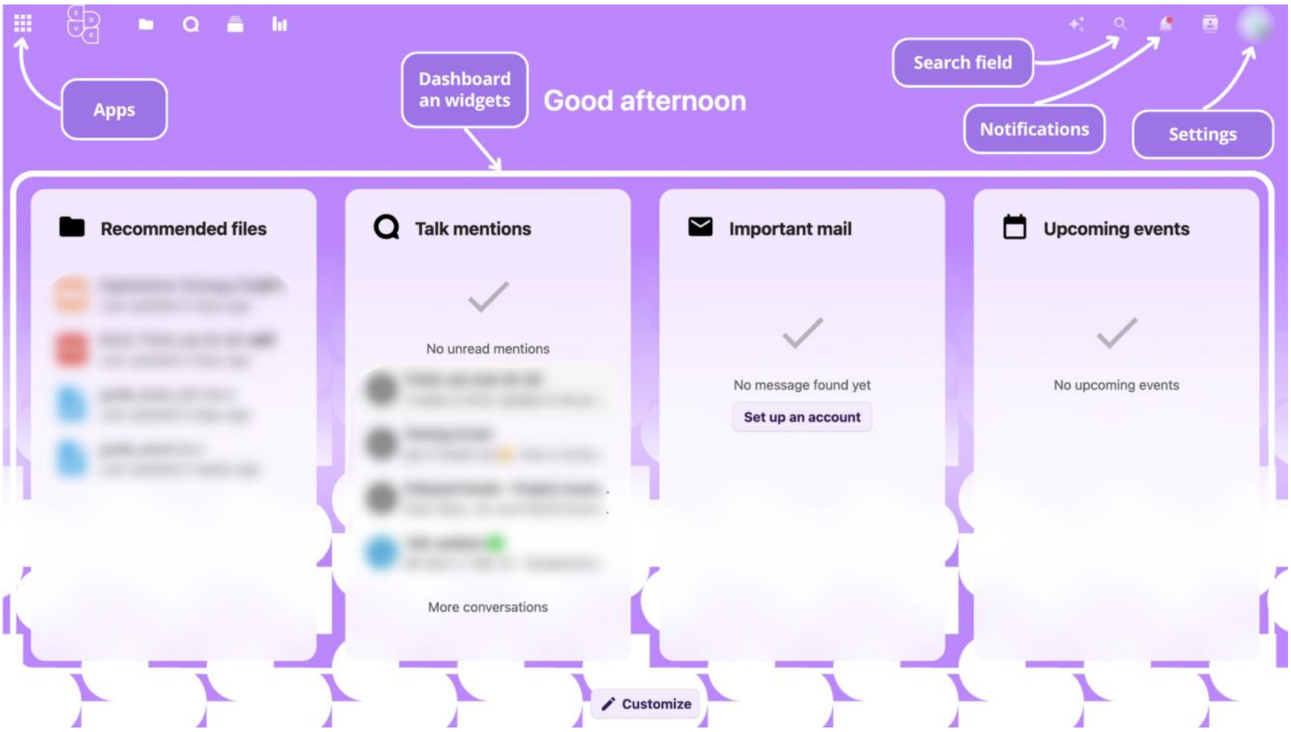
Login

To access the EDUC Portal:

- Open the EDUC Portal at http://portal.educalliance.eu/
- Click on Login
- Select your home university
- Sign in using your university credentials
- Access is automatically linked to your home university profile

EDUC Portal main user interface

After logging in, the EDUC Portal main interface provides access to all portal functionalities via The Dashboard



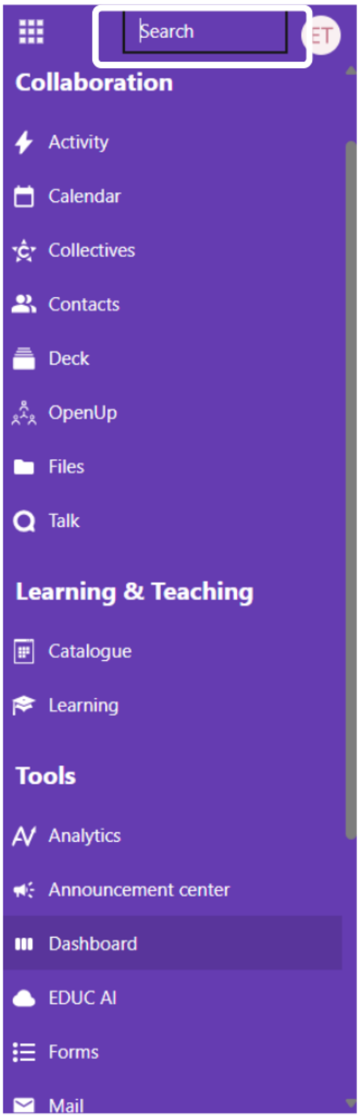
1 Dashboard

The interface consists of the following main elements:

1. The central area of the screen displays the **Dashboard**, which contains widgets.
2. At the top of the page, you can access:
   ◦ The **App menu** (grid icon) on the left to switch between applications and access additional tools, such as the Help Centre or EDUC Learning.
   ◦ The **Search button** to search across the system for all kind of content (click on "places" on the emerging window, to specify more your search).
   ◦ The **Notifications icon** to view system and activity notifications.
   ◦ The **Settings menu** on the right to access your personal settings, help, and logout options.

Click on the grid icon to open the navigation sidebar. From the sidebar, you can:

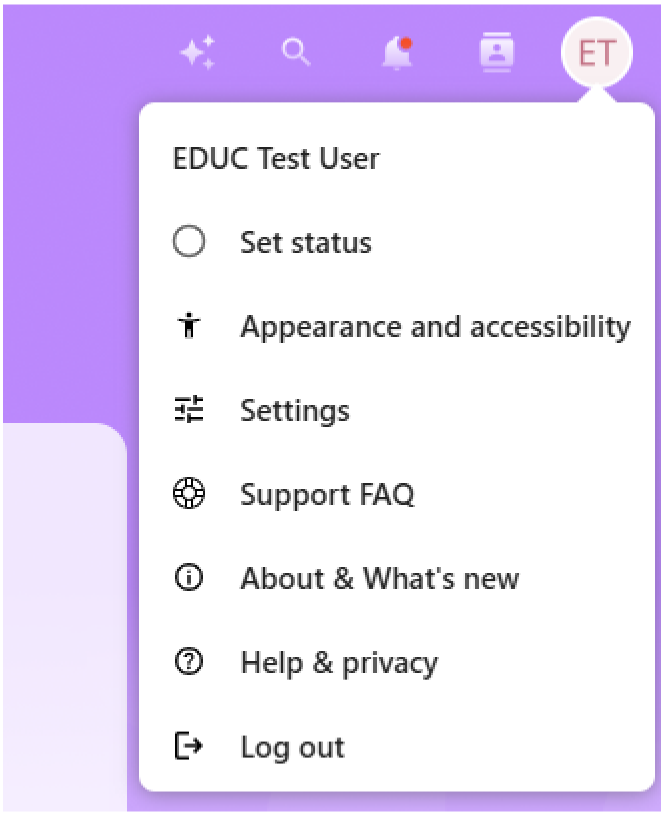
◦ Access the **Dashboard** by clicking on the EDUC icon.
◦ Open direct links to applications, the EDUC Catalogue, EDUC Learning, and local EDUC-related websites.
◦ Use the **Search** option to filter sidebar entries.



2 Side menu

Settings menu

Click on the circle in the top-right corner of the screen to access and manage your user profile and personal preferences.



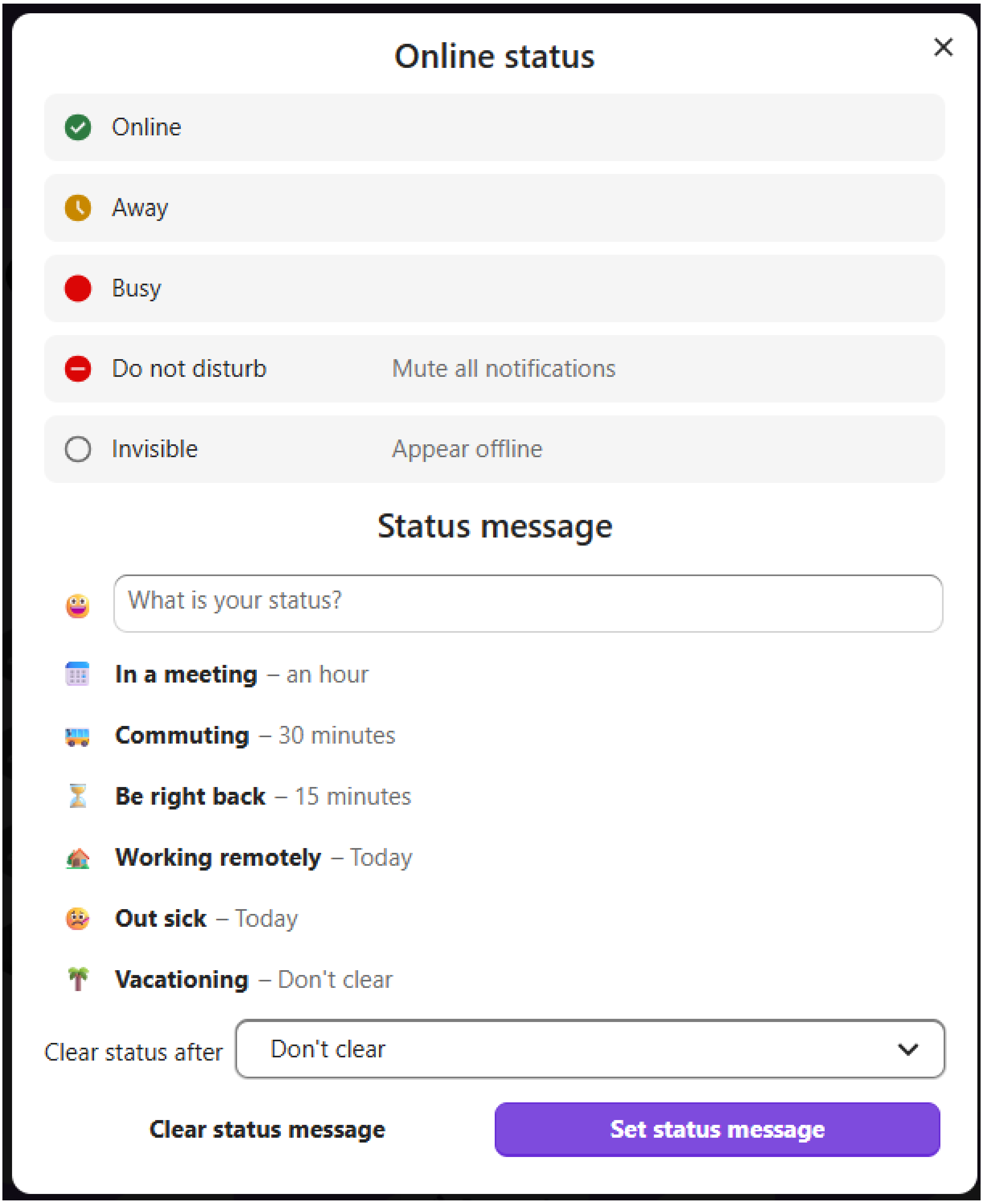
3 Settings menu

When you select it, the following sections will appear:

- **Your name**: displays the name of the user linked to your university credentials.
- **Set Status**: update your current status.
- **Appearance and Accessibility**: customise visual settings and accessibility options.
- **Settings**: configure account and system preferences.
- **Support FAQ**: access frequently asked questions and support resources.
- **About & What's New**: view platform information and recent updates.
- **Help & Privacy**: review privacy information.
- **Log Out**: sign out of your account.

Set status

The **Set Status section** allows you to manage your availability and inform other users of your current status.



4 Status menu

For your online status, select one of the following options:

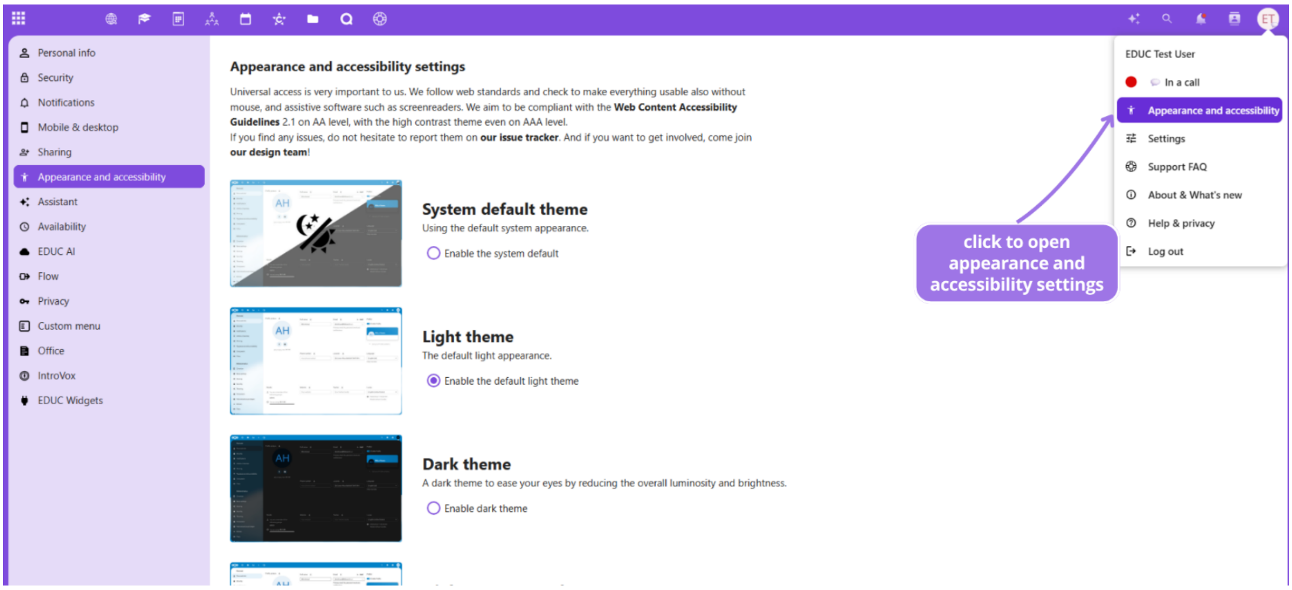
- **Online** – You are available and active.
- **Away** – You are temporarily inactive.
- **Busy** – You are working and respond with delays.
- **Do Not Disturb** – You are unavailable and notifications are muted.
- **Invisible** – You appear offline to other users while remaining logged in.

You can also:

- Add a custom status message to provide additional information about your availability.
- Select a suggested status or create your own.
- Set when your status resets automatically.
  Select **Don’t clear** to keep the status active until you change it manually.
- Join a meeting in the Talk app or add a calendar event to update your status automatically.

Appearance and Accessibility Settings

Access to the section: https://portal.educalliance.eu/index.php/settings/user/theming

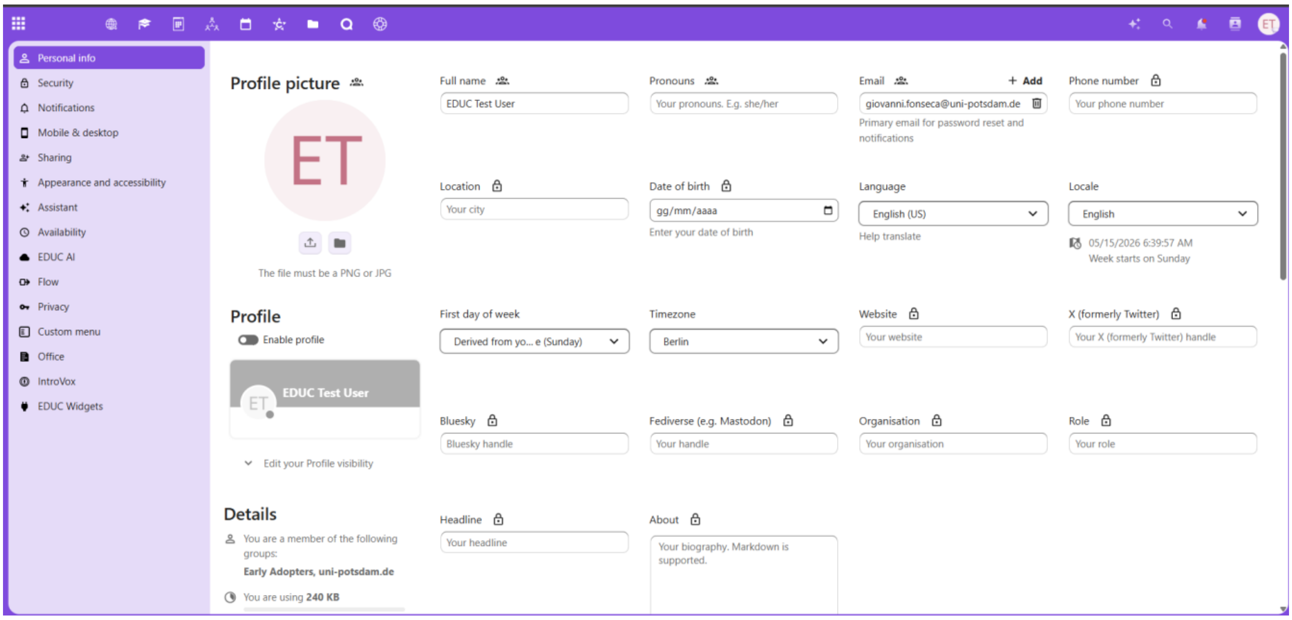


5 Appearance and accessibility

You can customise and adjust the following options:

- **Theme selection**: Choose your preferred interface theme:
  - System default theme
  - Light theme
  - Dark theme
  - High contrast mode (to improve visibility and clarity)
- **Dyslexia-friendly font**: Enable the dyslexia-friendly font to improve readability.
- **Keyboard shortcuts**: Enable or disable keyboard shortcuts. If shortcuts interfere with accessibility tools, disable them to ensure accessibility features work correctly. Disabling shortcuts deactivates them across all applications.
- **Navigation bar settings**: Customise the order of applications displayed in the navigation bar.

Personal Info



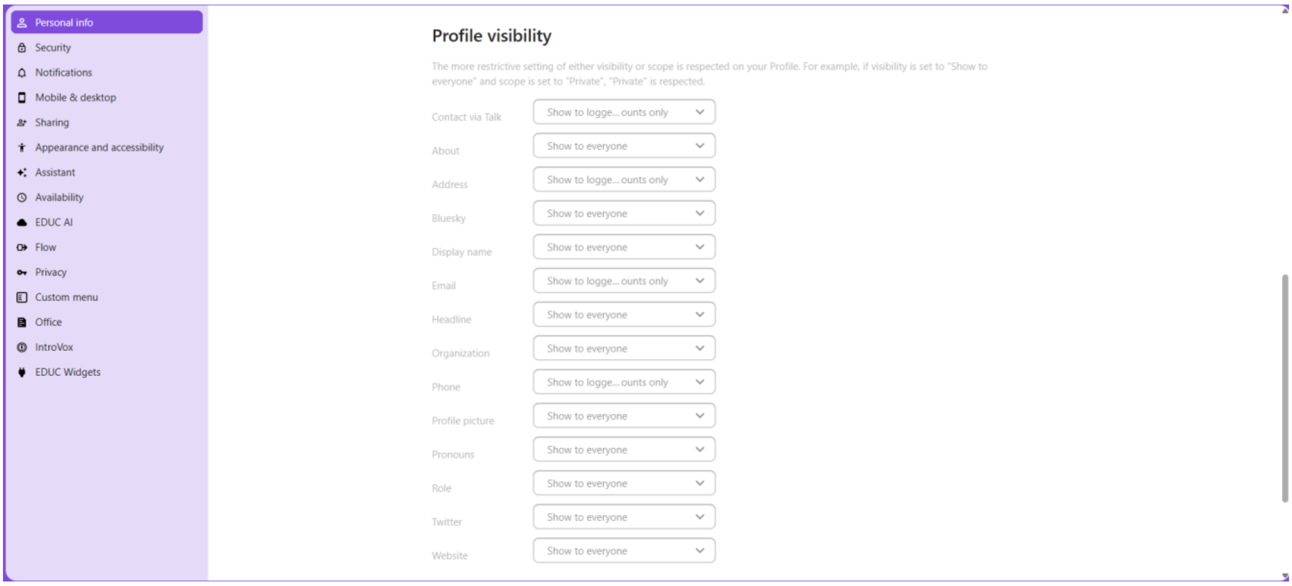
6 Profile information

Manage all profile information and personal details:

- Upload or change your profile picture.
- Specify your pronouns.
- Add or update your email address.
- Enter your phone number.
- Add your location.
- Enter your date of birth.
- Set your preferred language.
- Configure your locale and time zone.
- Add your social media accounts and website.
- Write and edit your bio.
- Manage profile visibility settings and control which information is visible and who can view it.

Important: Privacy settings control how your personal data is shared within the platform.

- **Everyone**: the information is public and visible to anyone with access to your personal profile link (if the profile is enabled).
- **Logged-in users**: the information is visible only to users with an active EDUC Portal account.
- **Hide**: the information remains private and visible only to you.

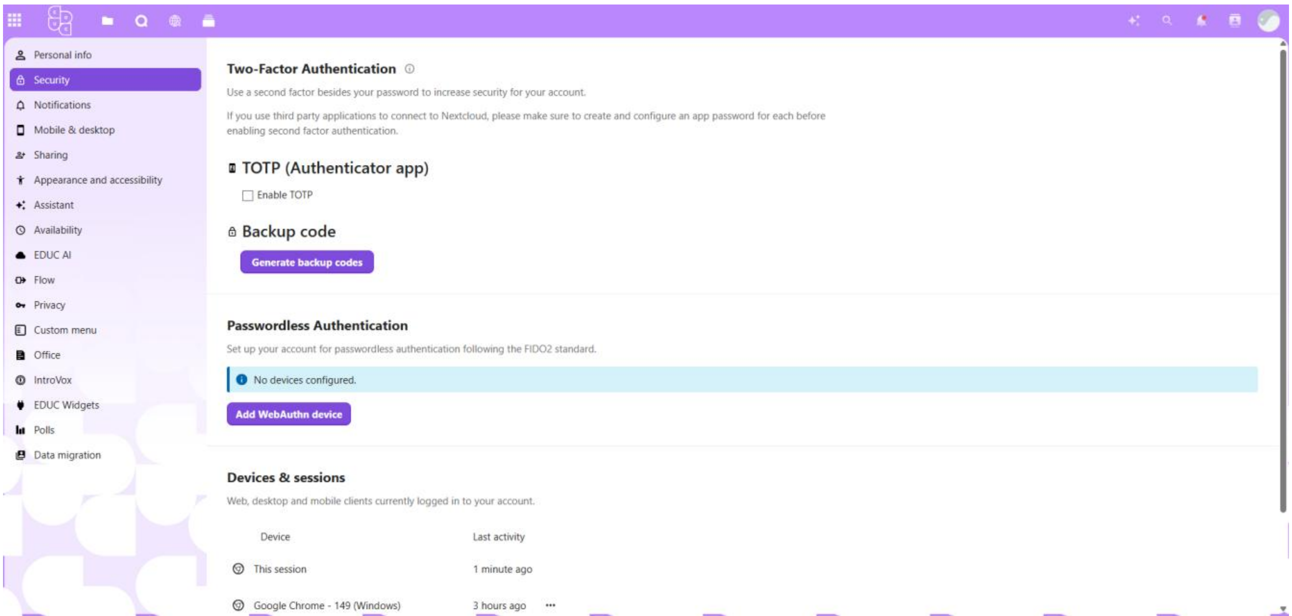


7 Profile visibility

Managing Security Settings

The **Security** section, available under **Settings**, allows you to manage and enhance the security of your EDUC Portal account.

Direct access https://portal.educalliance.eu/index.php/settings/user/security



8 Security setting

In this section, you can:

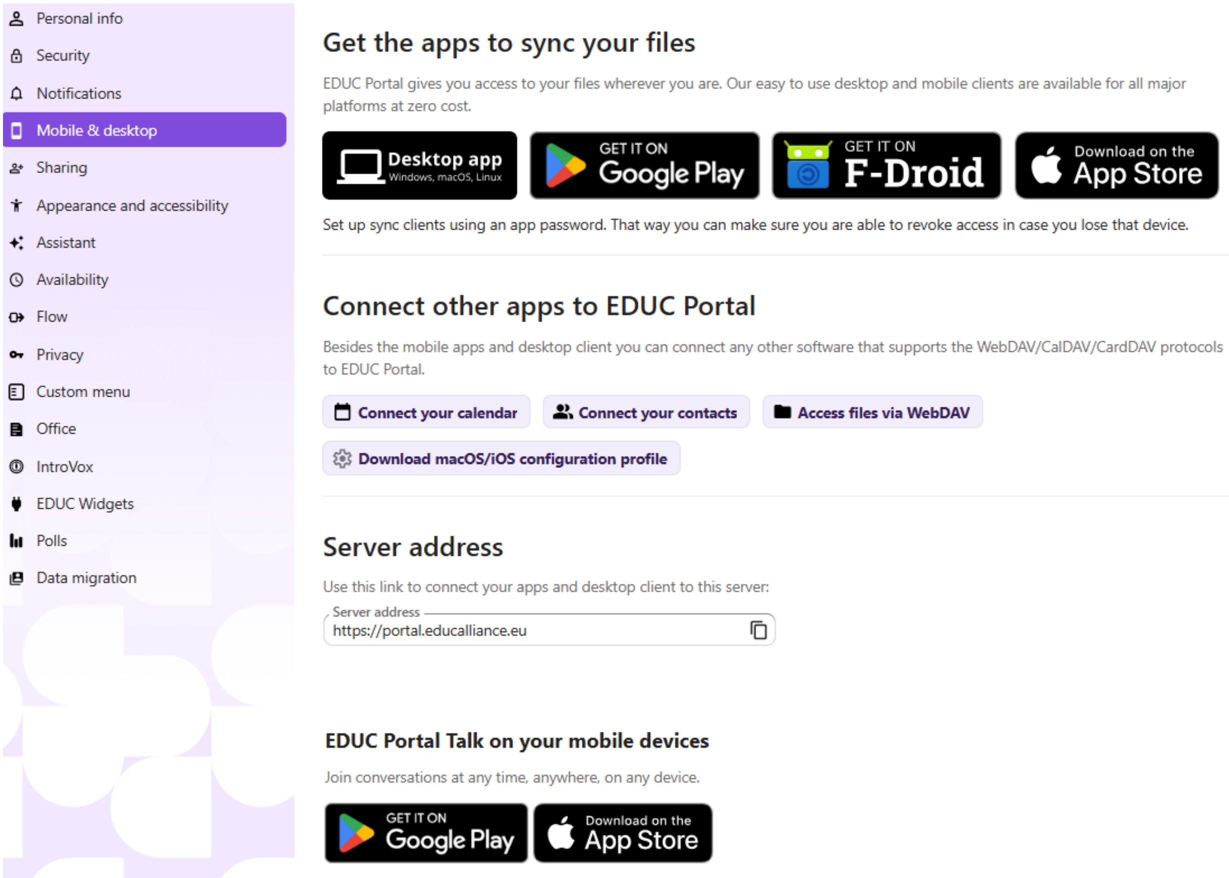
- Enable **Two-Factor Authentication (2FA)** to add an extra layer of protection to your account.
- Configure **passwordless authentication** for trusted devices, allowing you to sign in without entering your password.

- Review and manage the **devices** used to access your account.
- Monitor your active and previous **sessions** to keep track of account activity and identify any unauthorized access.

Regularly reviewing your security settings helps ensure that your account remains protected and accessible only to you.

Mobile & Desktop

The **Mobile & Desktop** section, available under **Settings**, provides everything you need to connect your devices and applications to the EDUC Portal. Direct access https://portal.educalliance.eu/index.php/settings/user/sync-clients



9 Mobile & Desktop

In this section, you can:

- Download and configure the desktop and mobile apps to **synchronize your files** across devices.
- Connect external applications to the EDUC Portal using the available synchronization links and settings.
- Synchronize portal services, such as your **calendar**, with other applications and devices.
- Download **EDUC Portal Talk** for your mobile devices to stay connected and collaborate on the go.

These tools help you access your files, calendars, and communication services seamlessly across all your devices.

Dashboard

Direct access to dashboard https://portal.educalliance.eu/apps/dashboard/

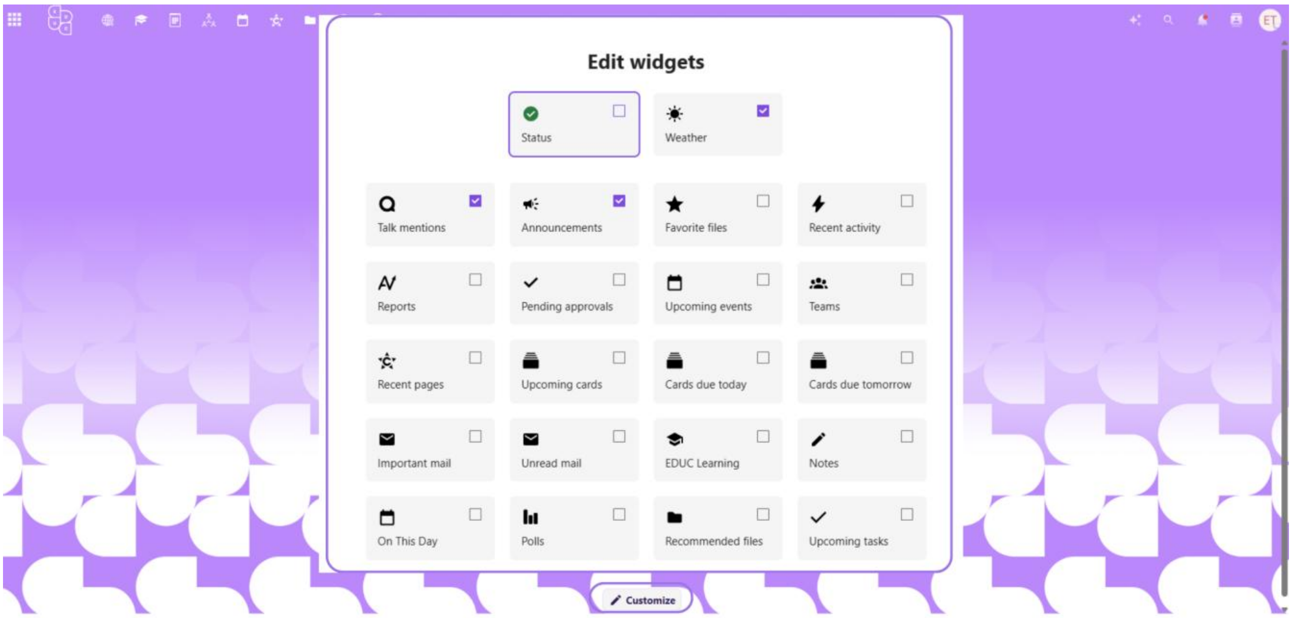
The **Dashboard** is the main overview page that provides quick access to relevant information, updates, and frequently used resources in one place. It contains widgets designed to help you stay organised and manage daily activities more efficiently.

Is possible to customise the dashboard,go to the section Customise the dashboard!

Advanced customisation

Customise the dashboard

Customise the Dashboard by clicking the **Customise button** located at the bottom center of the page. Once you enter customisation mode, you can decide whether to keep the default widgets or remove them by deselecting them.



10 Custom dashboard

Select the widgets:

- **Favourite files**: provides quick access to files you marked as favourites;
- **Recent activity**: shows the latest actions and updates in your workspace;
- **Reports**: gives access to reports that you added to favourites;
- **Announcements**: displays official announcements and important notices;
- **Pending approvals**: lists items waiting for your approval;

- **Attendance**: shows attendance-related information, as for example your appointments;
- **Teams** → displays your teams and quick access to them;
- **Recent pages**: lists pages you recently viewed or edited;
- **Upcoming cards**: shows cards with upcoming deadlines;
- **Cards due today**: displays cards that are due today;
- **Cards due tomorrow**: displays cards that are due tomorrow;
- **OpenProject**: provides quick access to OpenProject;
- **Unread mail**: lists emails you have not read yet;
- **EDUC learning**: gives you access to learning content;
- **Notes**: gives quick access to your personal notes;
- **Passwords**: provides access to your passwords marked as favourites;
- **On this Day**: pictures taken on this day will show up here;
- **Polls**: shows available polls you can participate in;
- **Upcoming tasks**: lists tasks scheduled in the near future;
- **Recent statuses**: displays recently updated statuses;
- **Start here**: provides guidance for getting started.

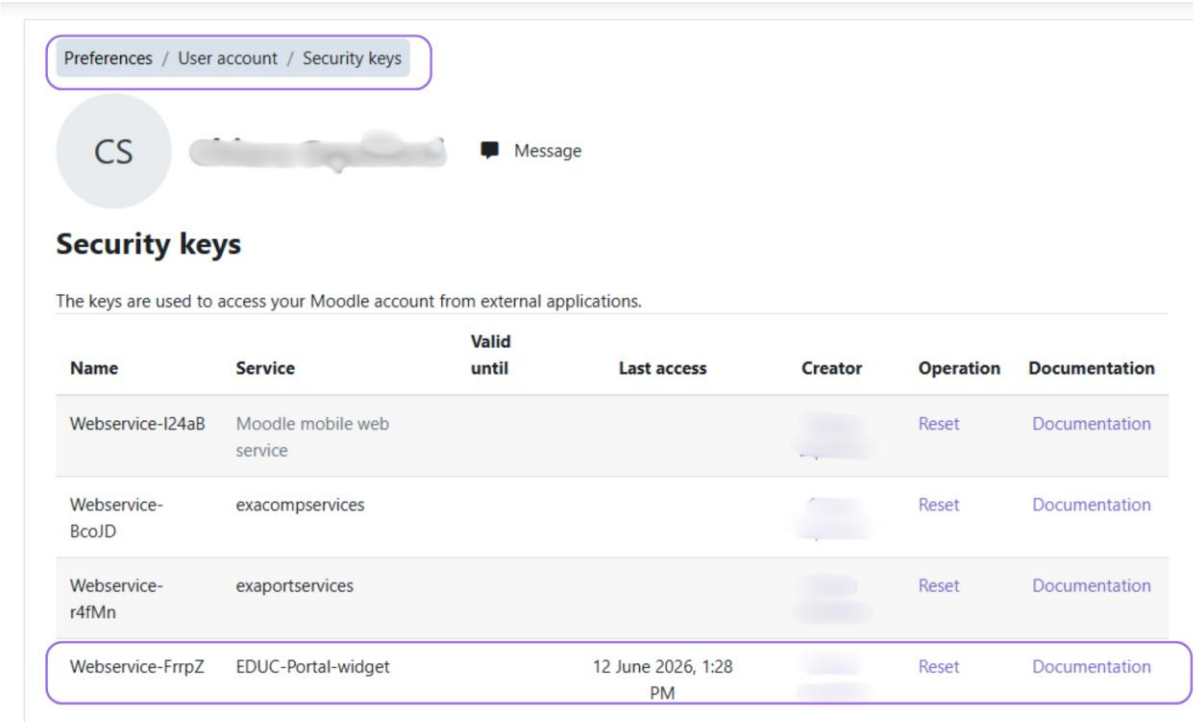
You can also add a widget that allows you to quickly **set your status**: by clicking on it, you are redirected directly to the page where you can insert or update your status.
In addition, you can add a **weather** widget that displays the forecast for your location.

Once selected, the widgets will automatically appear on your Dashboard.

Configuring the EDUC Learning Widget

To connect the EDUC Learning widget to your Moodle account, you first need to generate a new security key in Moodle.

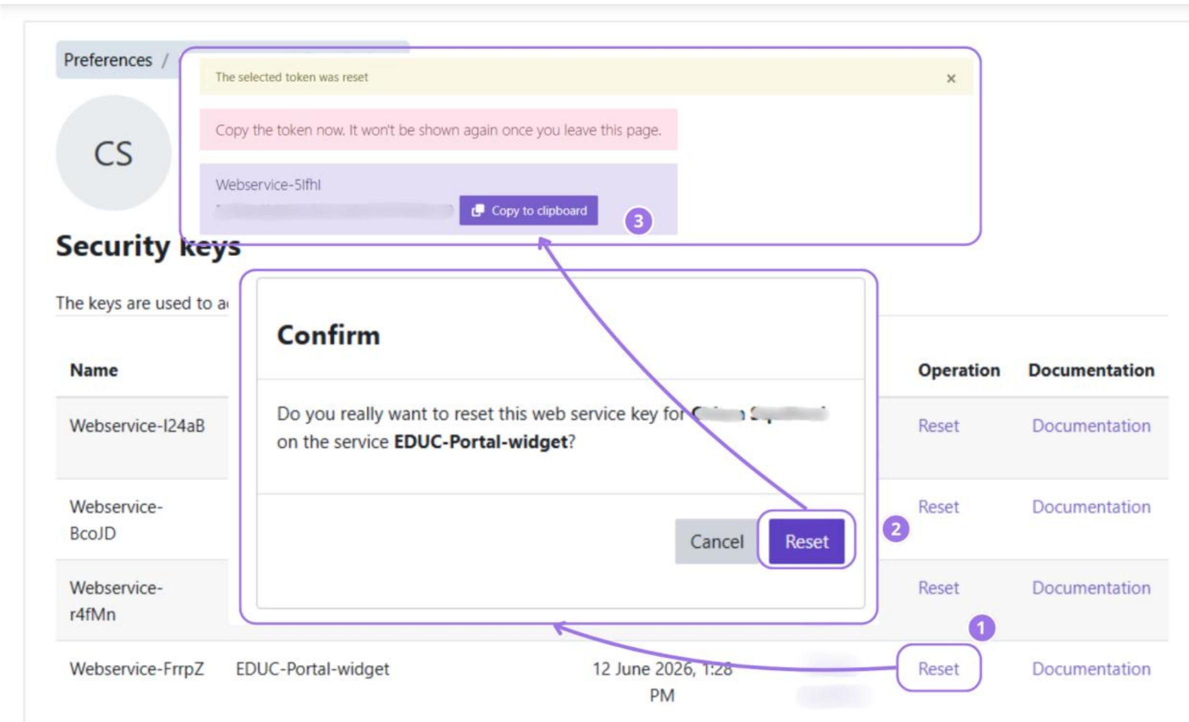
1. Log in to Moodle and navigate to **Preferences → User account → Security keys**.



11 Educ Learning security keys

2. Locate the security key related to the **EDUC Portal Widget** and click **Reset**.
3. Confirm the action. Moodle will generate a new key and display it on the screen.
4. Copy the key immediately.

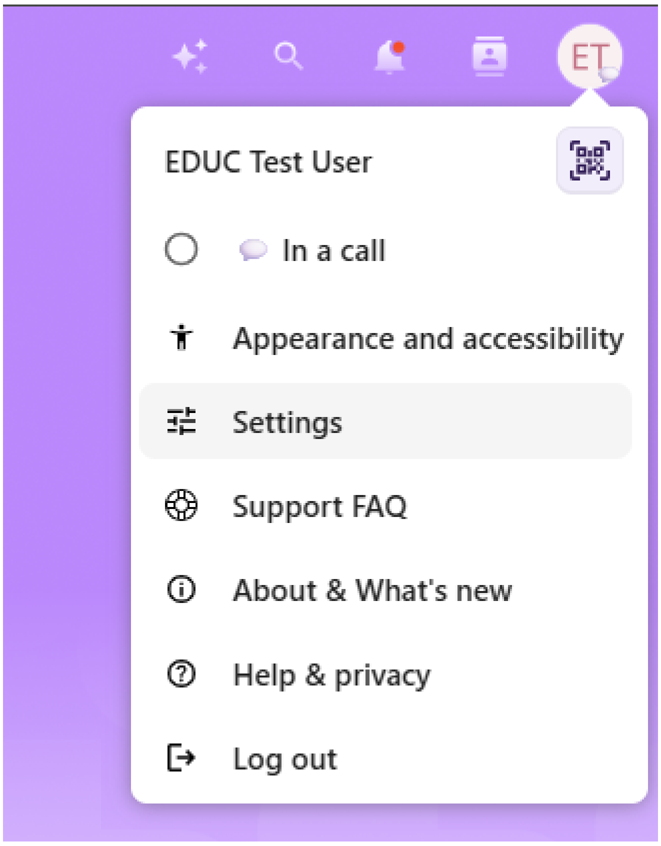
Important: the key can only be viewed and copied at this moment. If you do not save it, you will need to reset it again.



12 Copy EDUC Learning key for the Portal widget

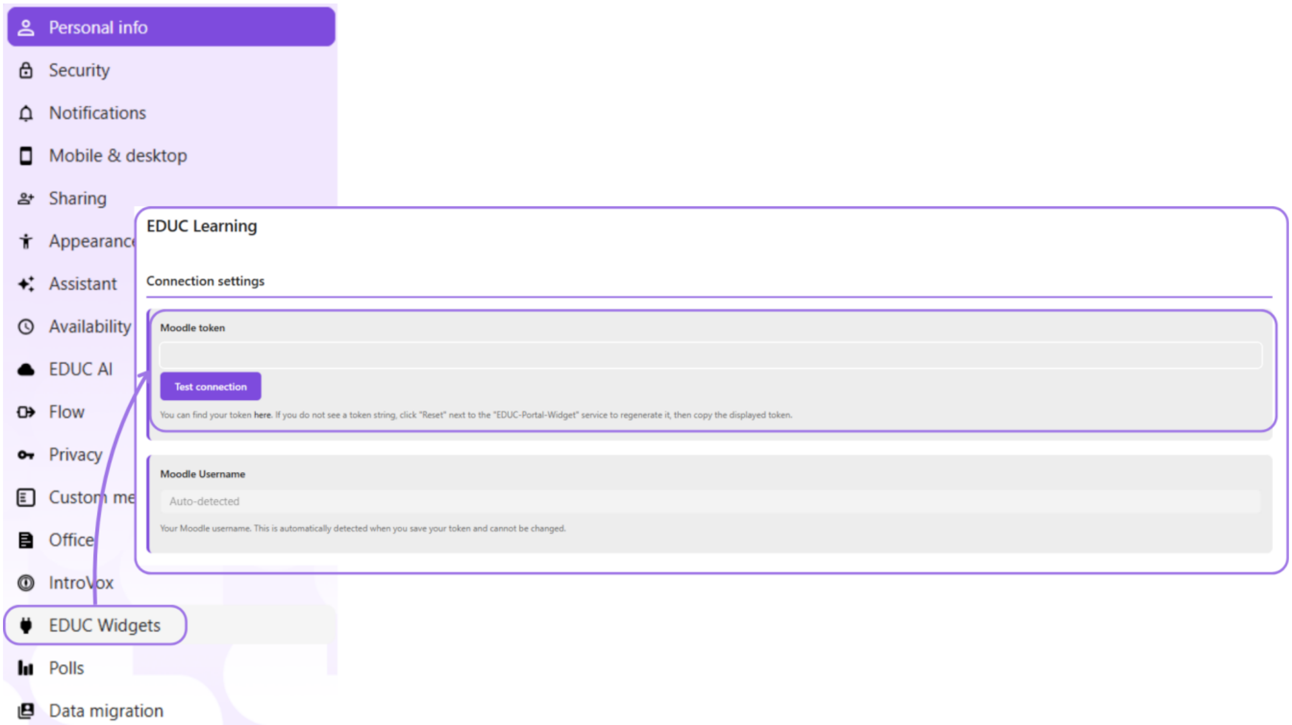
Next, configure the widget in the EDUC Portal:

1. Log in to the **EDUC Portal** and open **Settings**.



13 Settings in Educ Portal

2. Select **EDUC Widgets**.

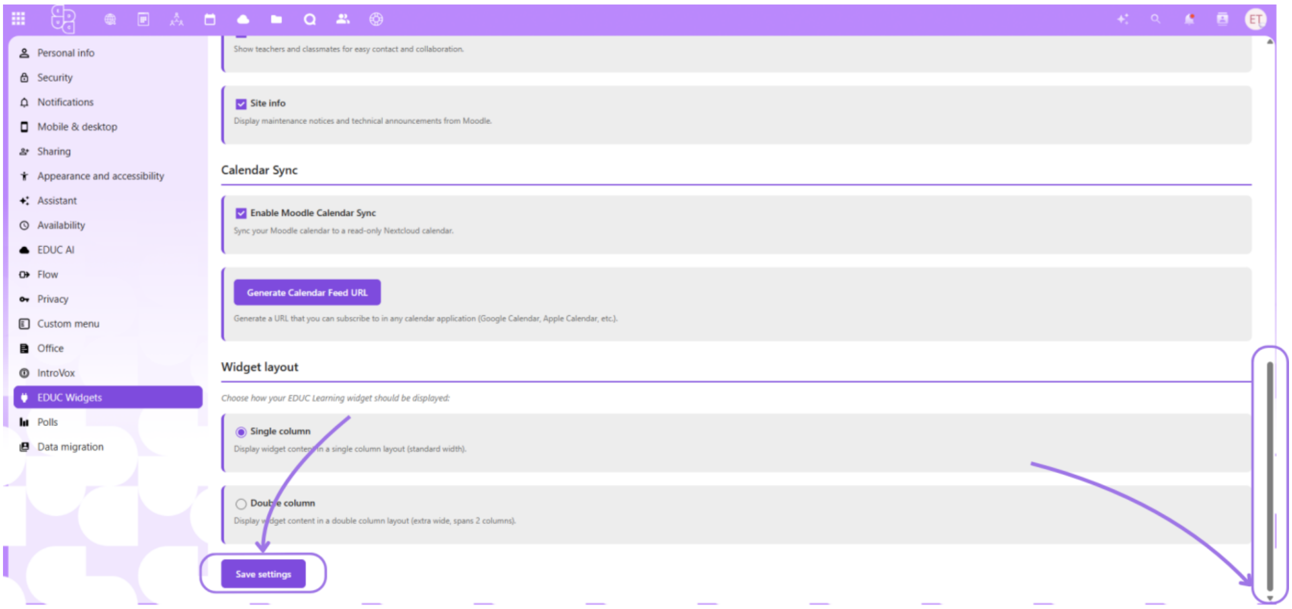


14 Configuring EDUC Widgets

3. Paste the security key into the appropriate field.

4. Click **Test Connection** to verify that the key is valid and the connection to Moodle is working correctly.

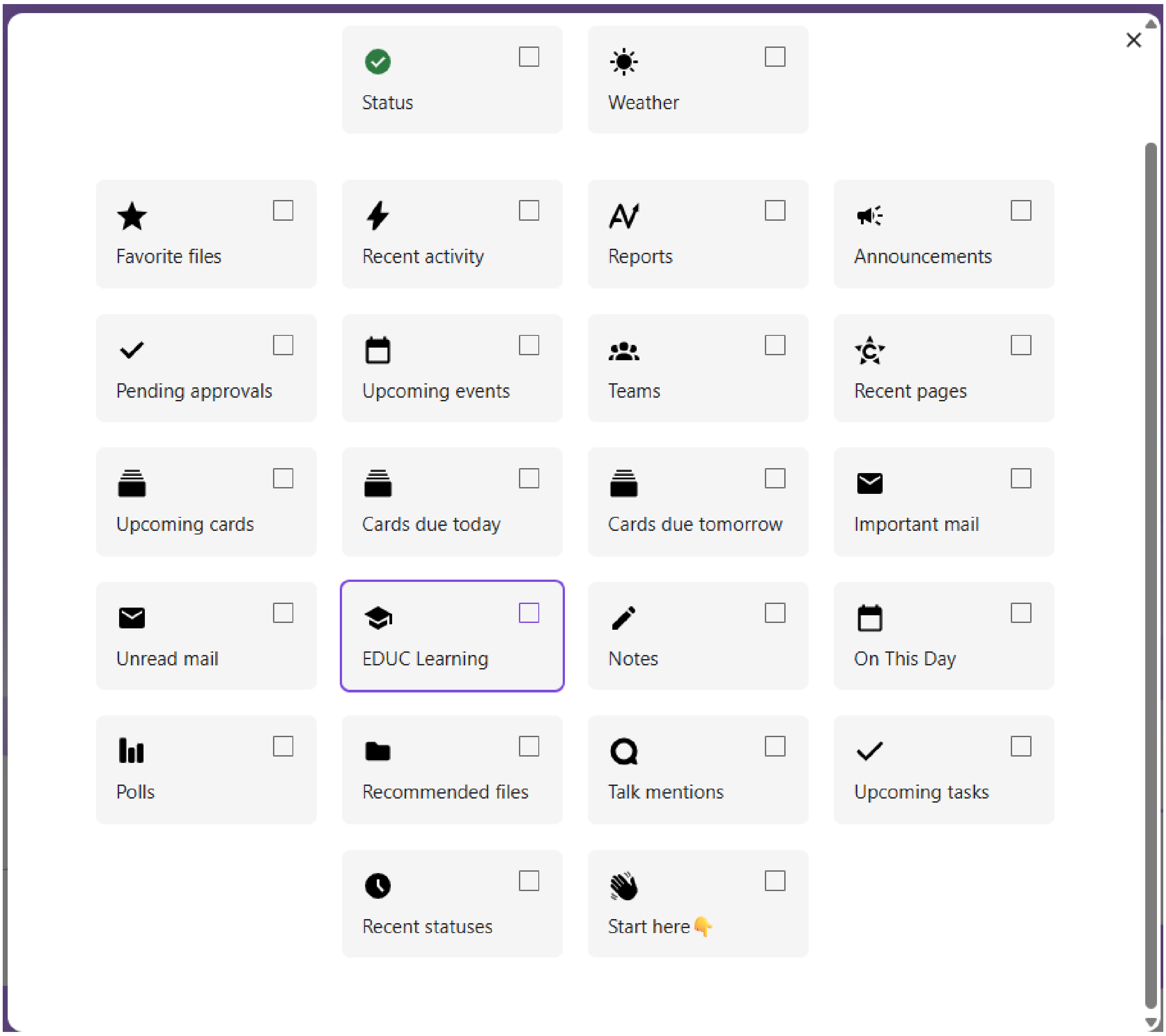
5. Scroll to the bottom of the page and click **Save**.



15 Save configurations in Settings EDUC Widgets

Finally, add the widget to your desktop:

1. Go to your portal desktop.
2. Click **Customize**.
3. Select the **EDUC Learning** widget to add it to your desktop.



16 Add EDUC Learning widget in dashboard

Once configured, the widget will display your Moodle learning information directly on your EDUC Portal desktop.

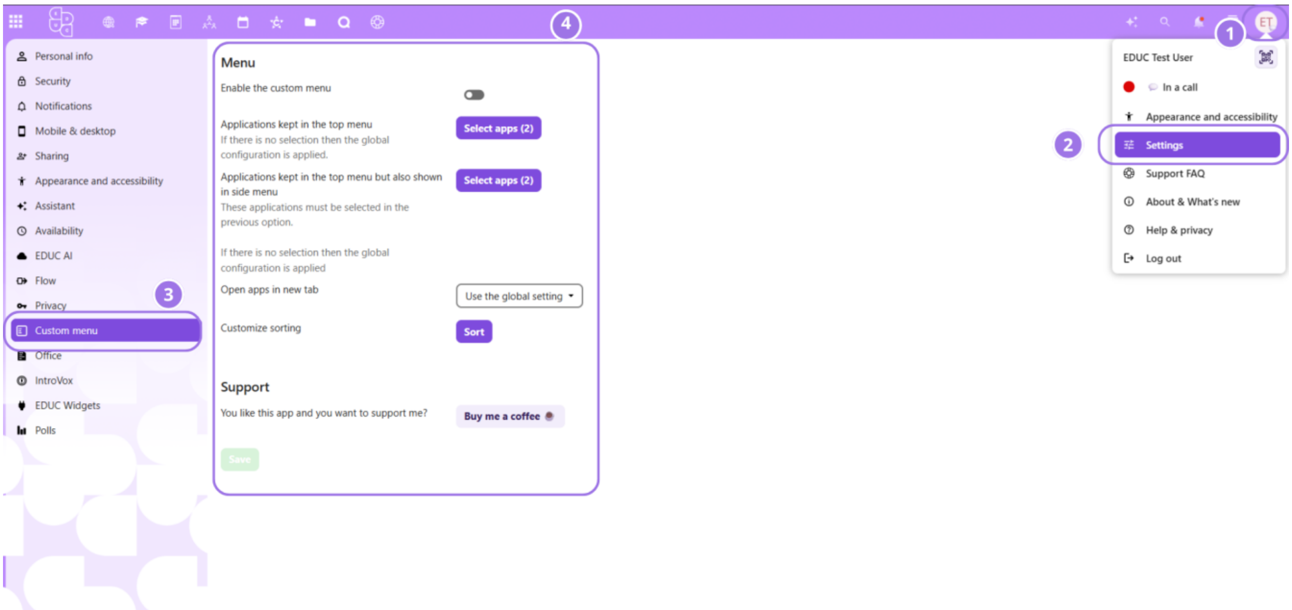
Customizing the Widget EDUC Learning

You can customize the information displayed by the EDUC Learning widget, configure calendar synchronization, and adjust the widget layout at any time. To do so, go to **Settings → EDUC Widgets**, where you can manage all widget preferences according to your needs.

Personalise the top-menu

To personalise the top menu:

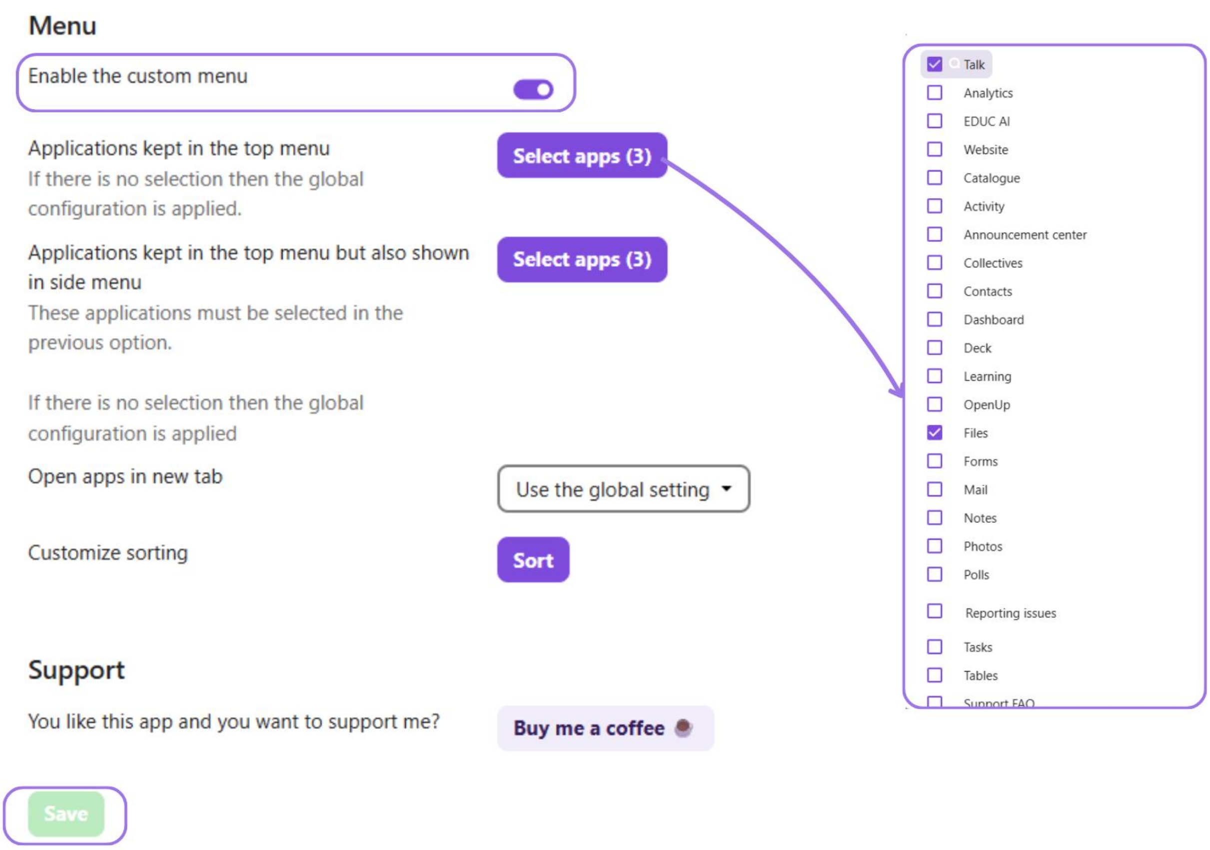
1. Click settings on the right corner
2. Select **Settings**
3. Click **Custom menu** from the left sidebar
4. Configure how applications are displayed in your workspace



17 Custom top menu

To customise the menu:

1. Enable the **Enable the custom menu** option
2. Select which applications to display in the top menu only
3. Choose which applications to display in both the top and left-side menus
4. Click **Save** to apply the changes automatically



18 Chose apps for top menu

To customise the side menu order:

1. Click **Sort**
2. Move items up or down to change their position

Click **Save** to apply the new order

Collaboration apps

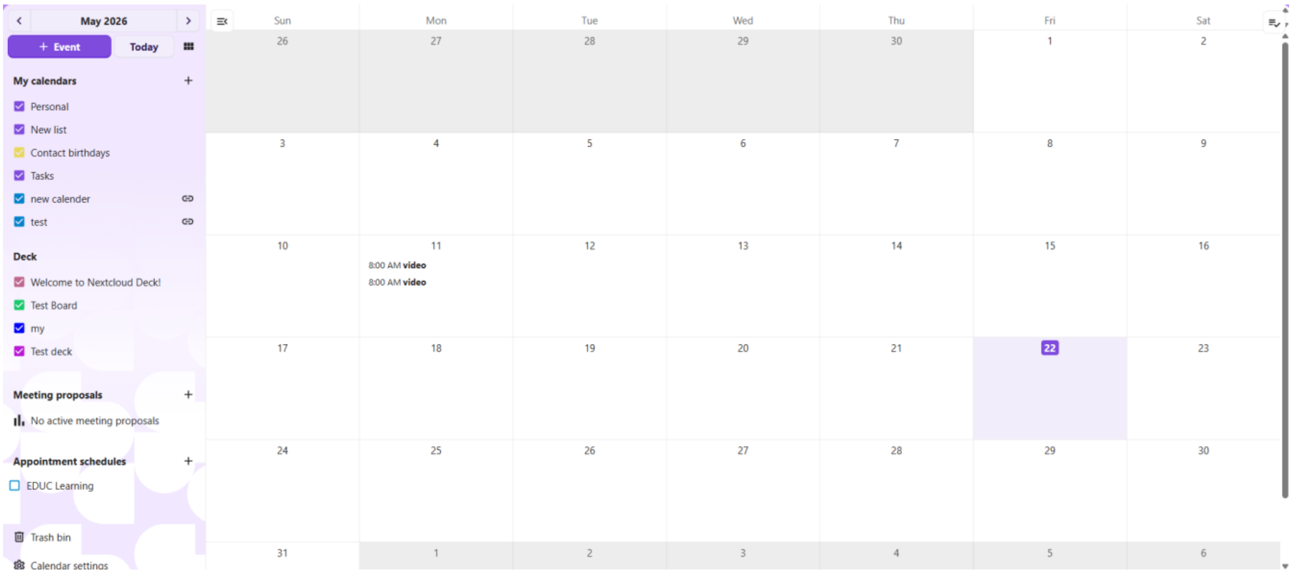
Use chat and meetings to communicate with colleagues and use the chatbot for support and quick assistance.

Manage contacts, explore colleagues within the organisation, and work with teams and group structures.

Calendar

Direct access https://portal.educalliance.eu/apps/calendar/.

Use the **Calendar App** to organise your time, manage events, and coordinate meetings efficiently. Integrate calendars with tasks and other tools to keep activities organised in one place.



19 Calendar

Tasks with assigned dates appear automatically in the calendar, allowing you to monitor commitments, deadlines, workload and to-do items in a clear and structured way.

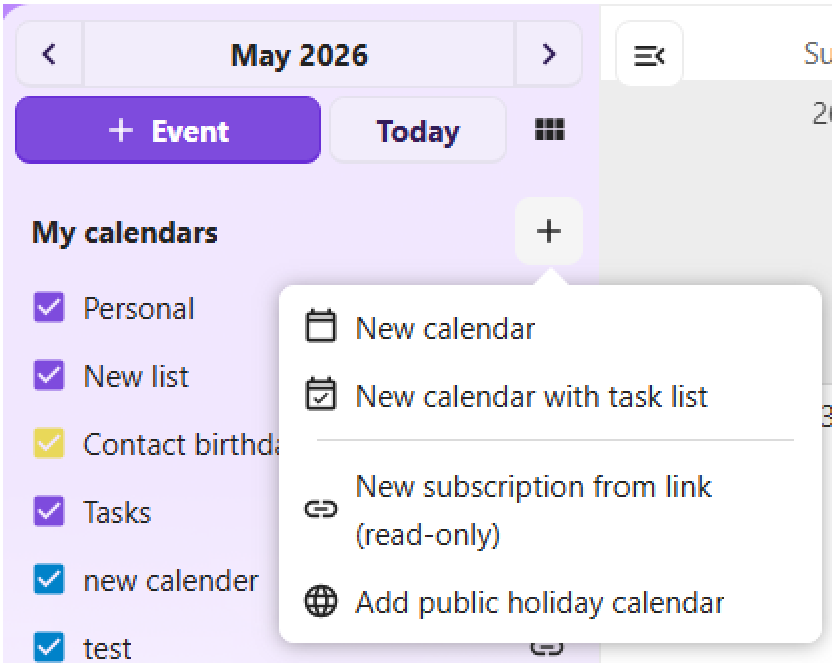
Creating and managing Calendars

Create multiple calendars based on different areas of interest (e.g., Work, Personal, etc.)

To **create a new calendar**:

1. Click the “+” button in the left panel.

2. Select one of the available options:
    - **Create a new calendar**
    - **Create a calendar with a task list**
3. Enter the name.
4. Click the arrow to confirm.



20 Creating a new calendar

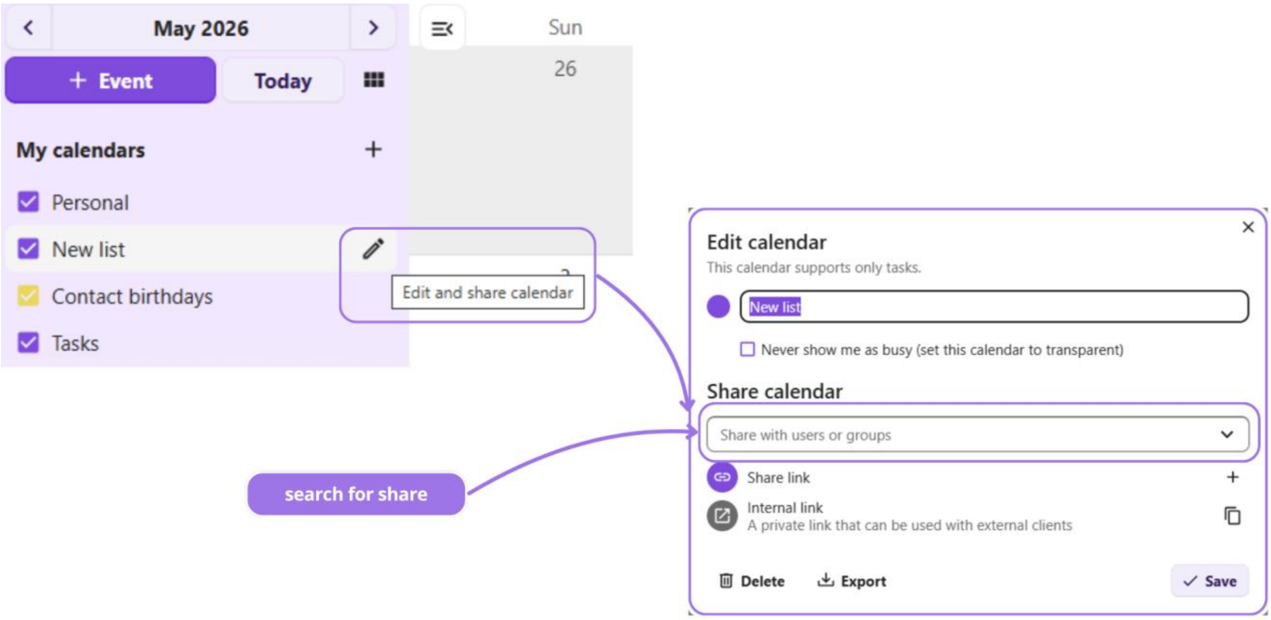
The new calendar appears automatically in the list on the left-hand side.

Share a calendar

To share a calendar:

- Open **Edit calendar** by clicking the pencil icon above the calendar you want to share (all calendars are listed on the left-hand side).
- Go to the **Share calendar** section.
- Enter the name of the user or group you want to share the calendar with.

You can also share the calendar by copying its link, or create a private link for external users.

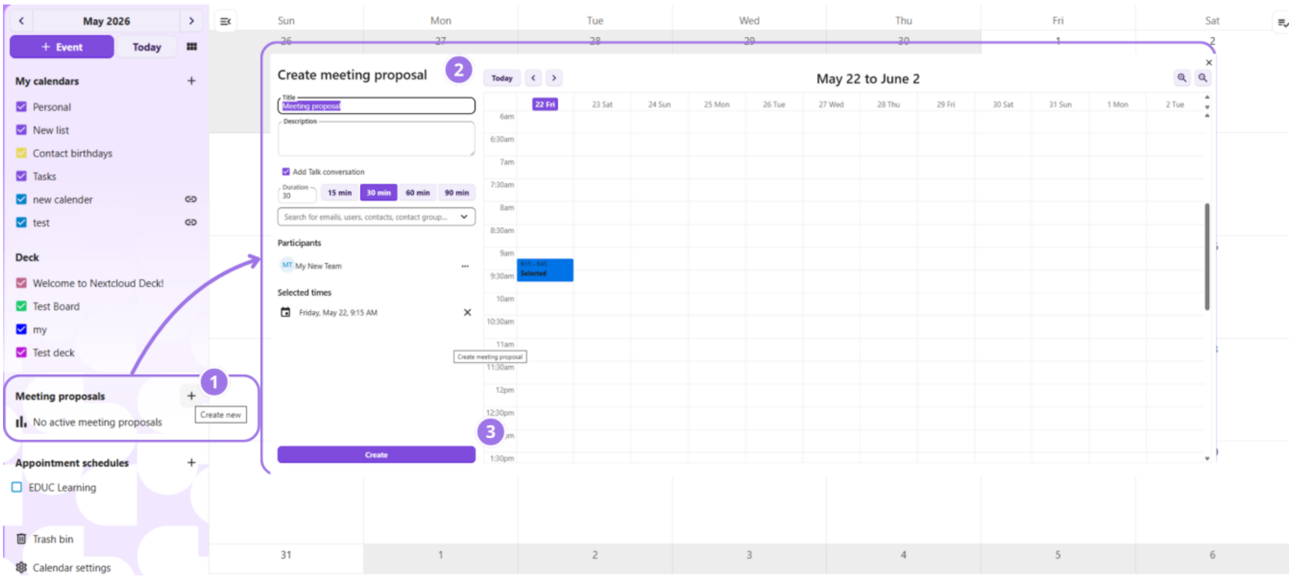


21 Sharing a calendar

Creating a Meeting Proposal

Create a **Meeting Proposal** directly from the Calendar section:

1. Click the "+" button in the relevant section on the left.
2. Fill in the required fields:
   - **Title**
   - **Description**
   - **Location**
   - **Duration**
   - **Chose the slot in the calendar to propose**
   - **Add participants** by selecting email addresses, users, contacts or contact groups and teams created in the EDUC Portal
3. Click "Create" to finalise the proposal.

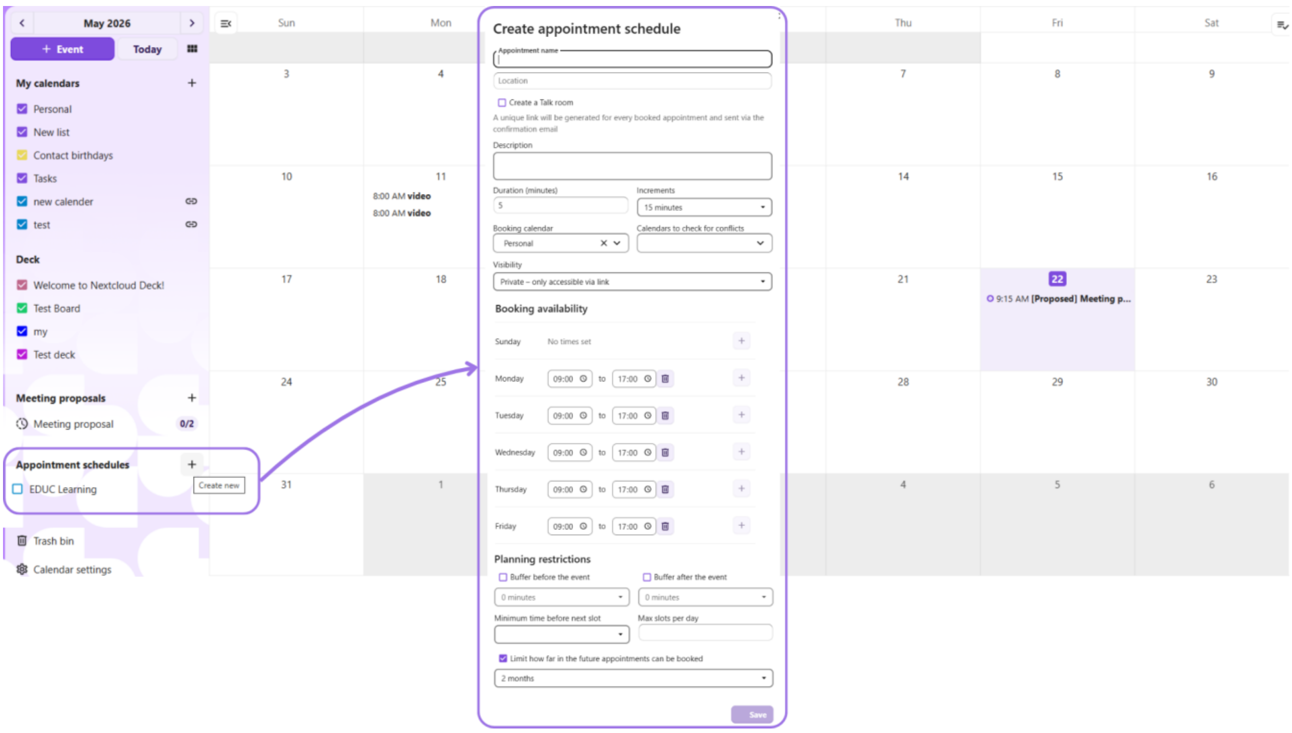


22 Creating a meeting proposal

Select “Add talk conversation” to create a direct link on Talk.

Appointment Schedules

The Calendar also includes a dedicated section for **Appointment Schedules**, which allows others to book time slots with you.



23 Creating an appointment schedule in calendar

To create an appointment schedule:

1. Click the **“+”** button.
2. Fill in the following details:

    - **Appointment name**
    - **Location**
    - Option to create a dedicated talk room
    - **Description**
    - Select the calendar where the appointment will be added
    - **Duration** and **time increments**
    - **Visibility settings**:
        - Private (accessible via a secret link)
        - Public (visible on your profile page)

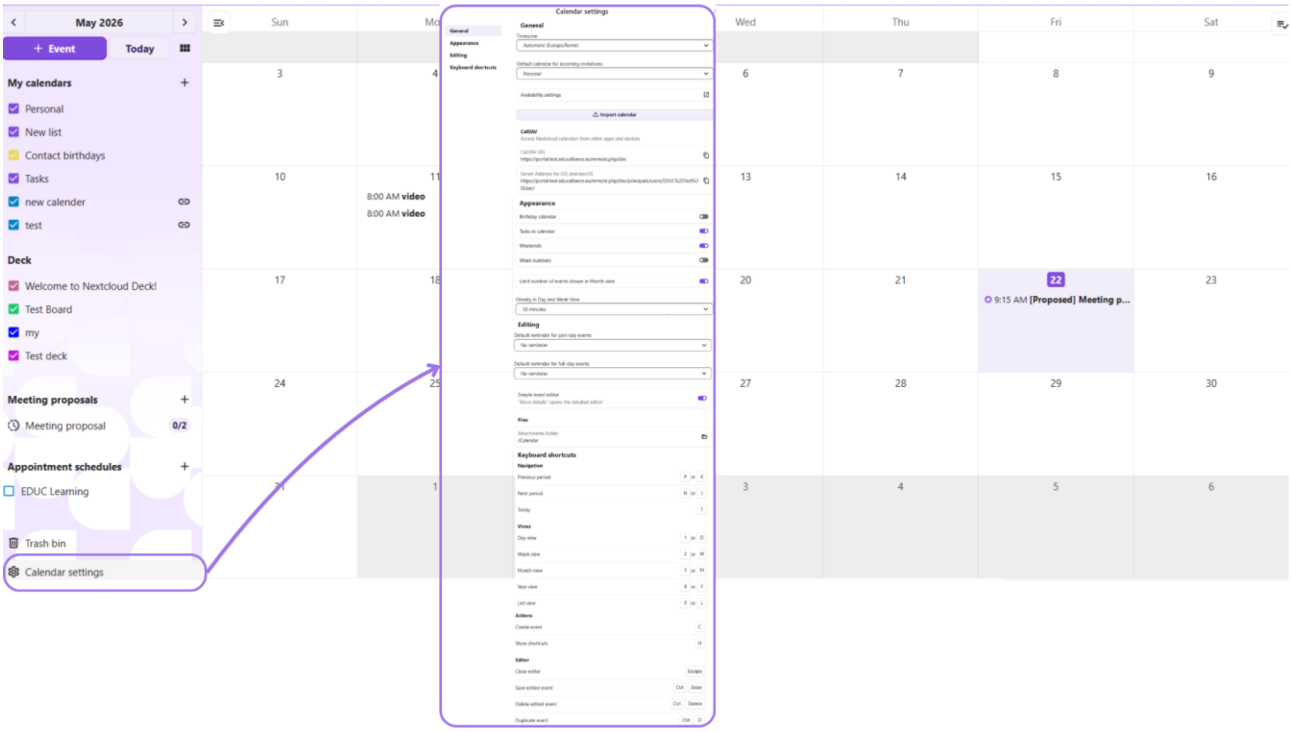
Optional:

- Include additional calendars to automatically check for scheduling conflicts.
- Select available **time ranges** for appointments.
- Add buffer time **before and after events** (e.g., 0, 5, 10 minutes, up to 1 hour).

Planning restrictions:

- Minimum time before the next available slot
- Maximum number of appointments per day
- Limit on how far in advance appointments can be booked (from 1 week up to 1 year)

Calendar Settings

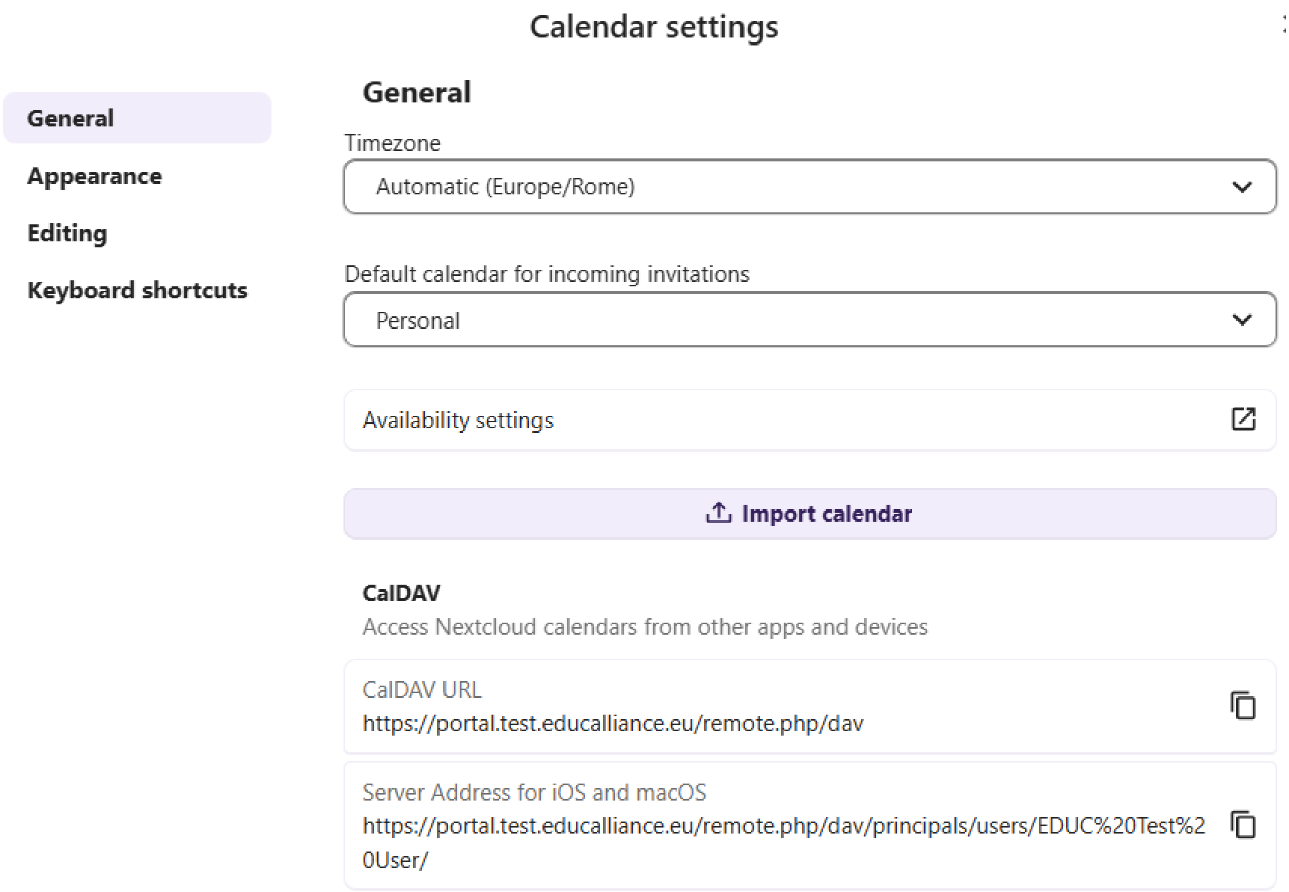


24 Calendar settings

Calendar Settings is divided into:

1. <u>General</u>, where you can:

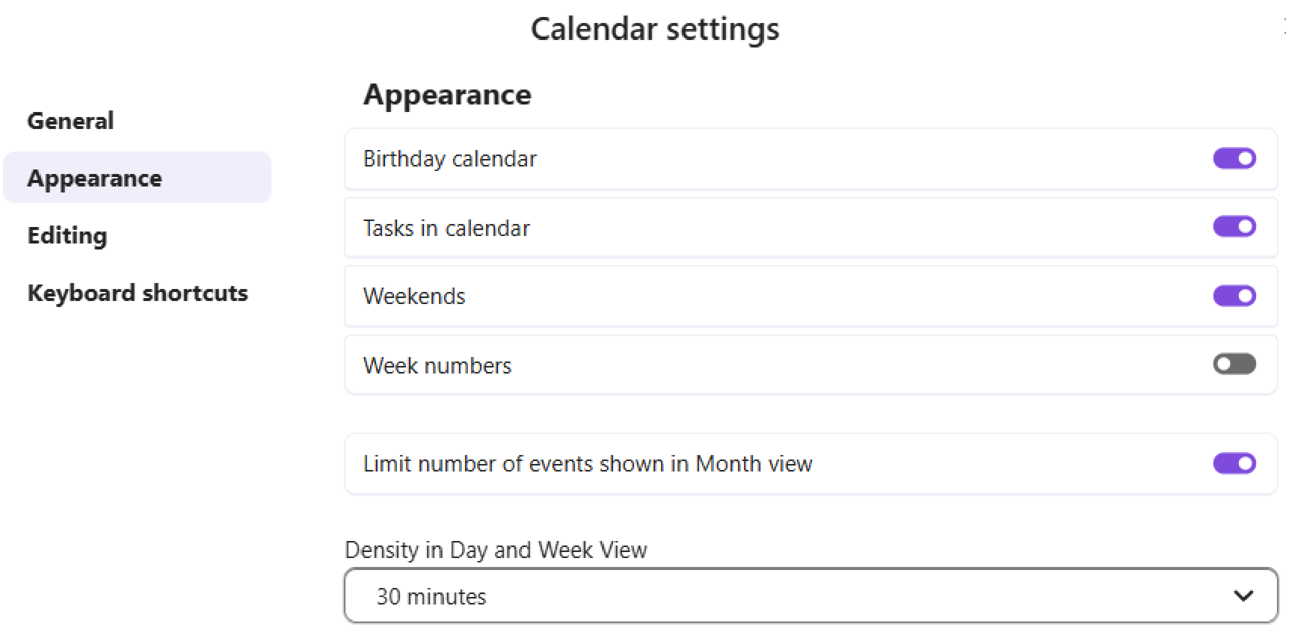
- Set your **time zone**
- Choose a **default calendar** for incoming invitations
- Import external calendars



25 General calendar settings

2. <u>Appearance</u>, to customise how calendar is displayed. Choose whether to show:

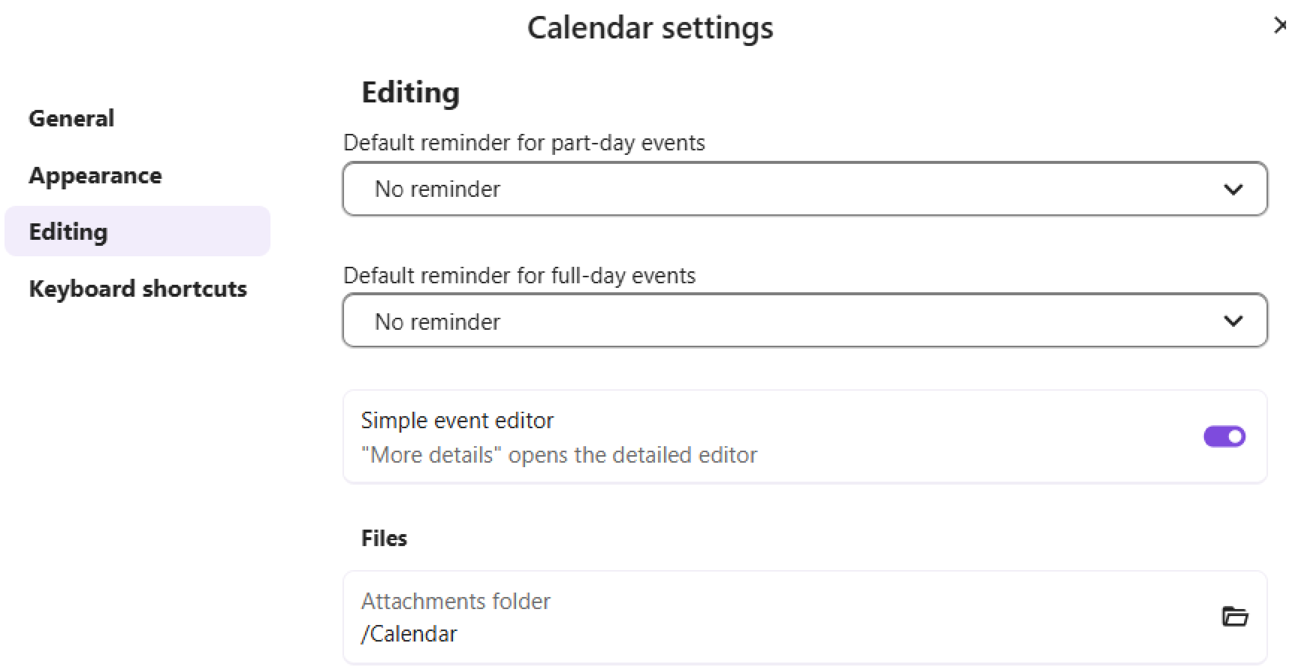
- Tasks within the calendar
- Weekends
- Week numbers



26 Appearance Calendar settings

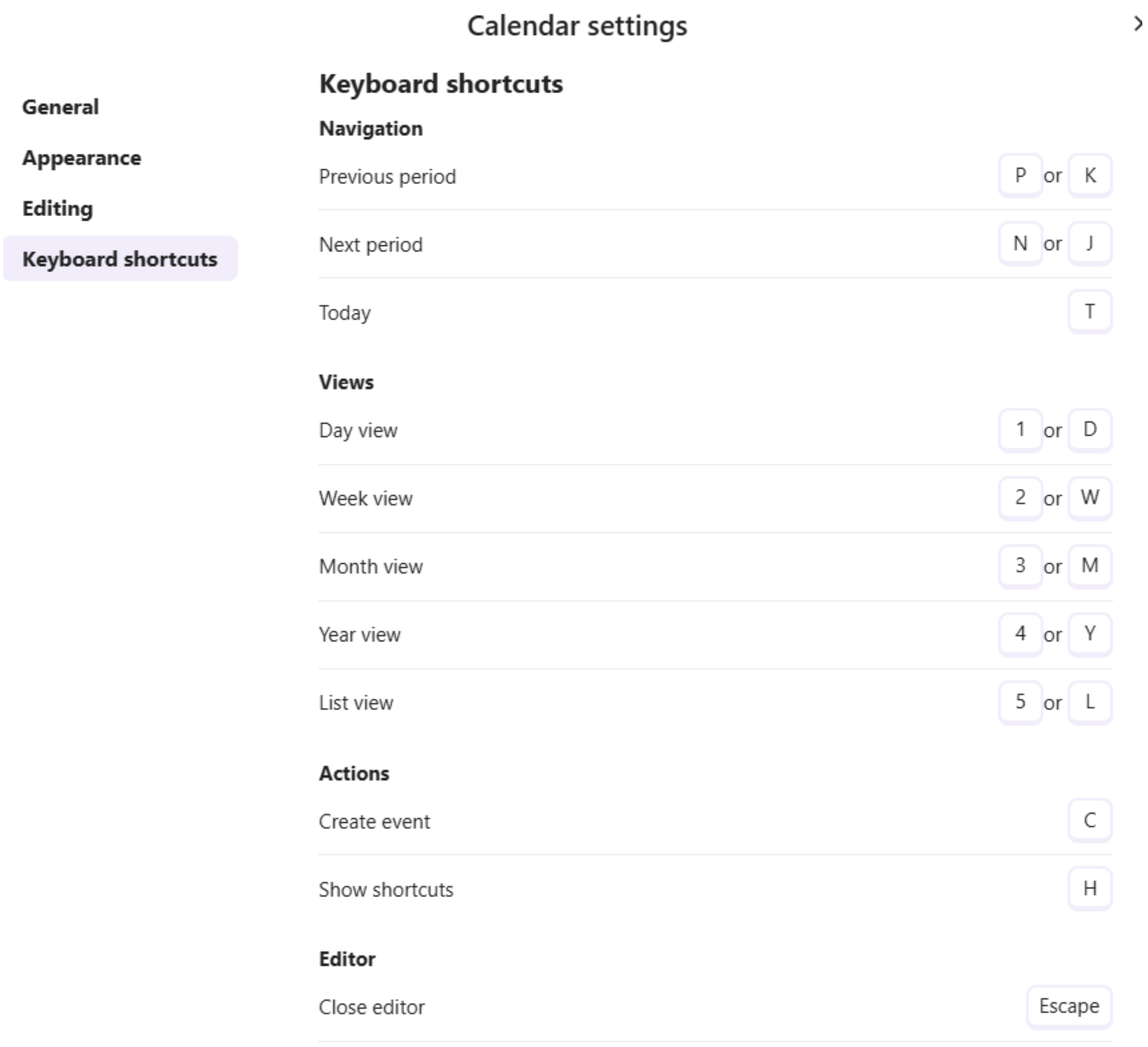
3. Editing:

- Set **reminders** for meetings and events
- Choose when to receive notifications (e.g., 1 day before, 2 hours before, etc.)



27 Editing Calendar settings

4. Keyboard Shortcuts: which is a list of shortcuts available to help you navigate and manage your calendar more efficiently, saving time when performing common actions.



28 Keyboard shortcuts Calendar settings

Collectives

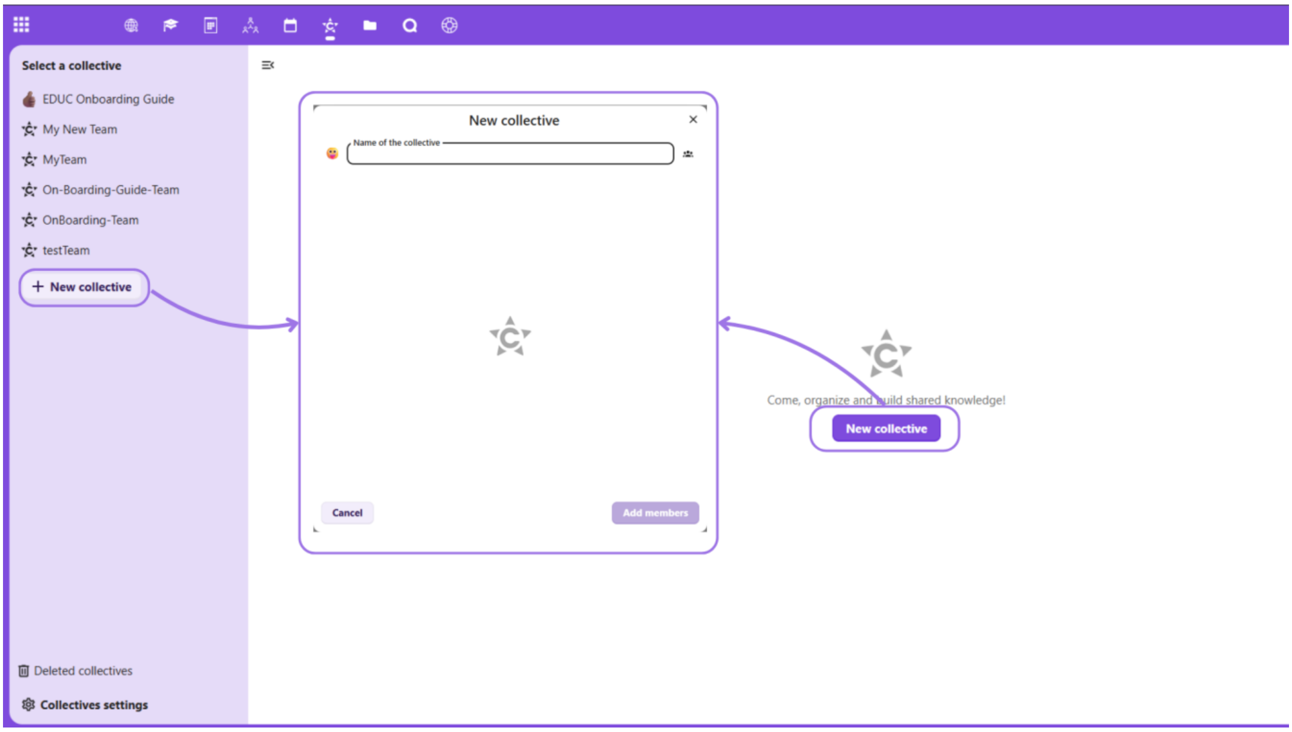
Direct access https://portal.educalliance.eu/apps/collectives/

Collectives is a shared Wiki with nested pages designed for collaboration within teams. It is ideal for content that needs to remain organised and easy to retrieve over time, such as meeting notes, decisions, procedures, and Dashboard pages.

You can collaboratively edit pages and build a structured, hierarchical page system.

Create a new Collective

Create a collective when the content should be **shared, structured, and long-lived.**



29 Collectives

Important: If you already have a team want to create a **Collective** for it, create the Collective from the the **Team section in Contacs** . If you create a Collective directly, a new Team is created for that Collective.

Steps (recommended when you already have a Team):

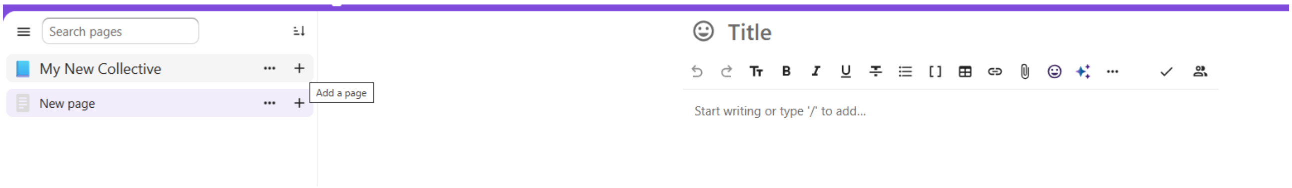
1. Open your **team under Contacts**.
2. Click **Collective** (Create).
3. Name the Collective.
4. Invite members if prompted.

Steps (when you don't have a Team yet):

1. Open **Collectives**.
2. Click **Create new collective**.
3. Name the Collective and add members when prompted.

Build pages

Collectives allow you to build a structured page tree inside each Collective. This enables clear documentation structure and a hierarchy that can grow over time. Pages can be nested across multiple levels (subpages, sub-subpages, and beyond).



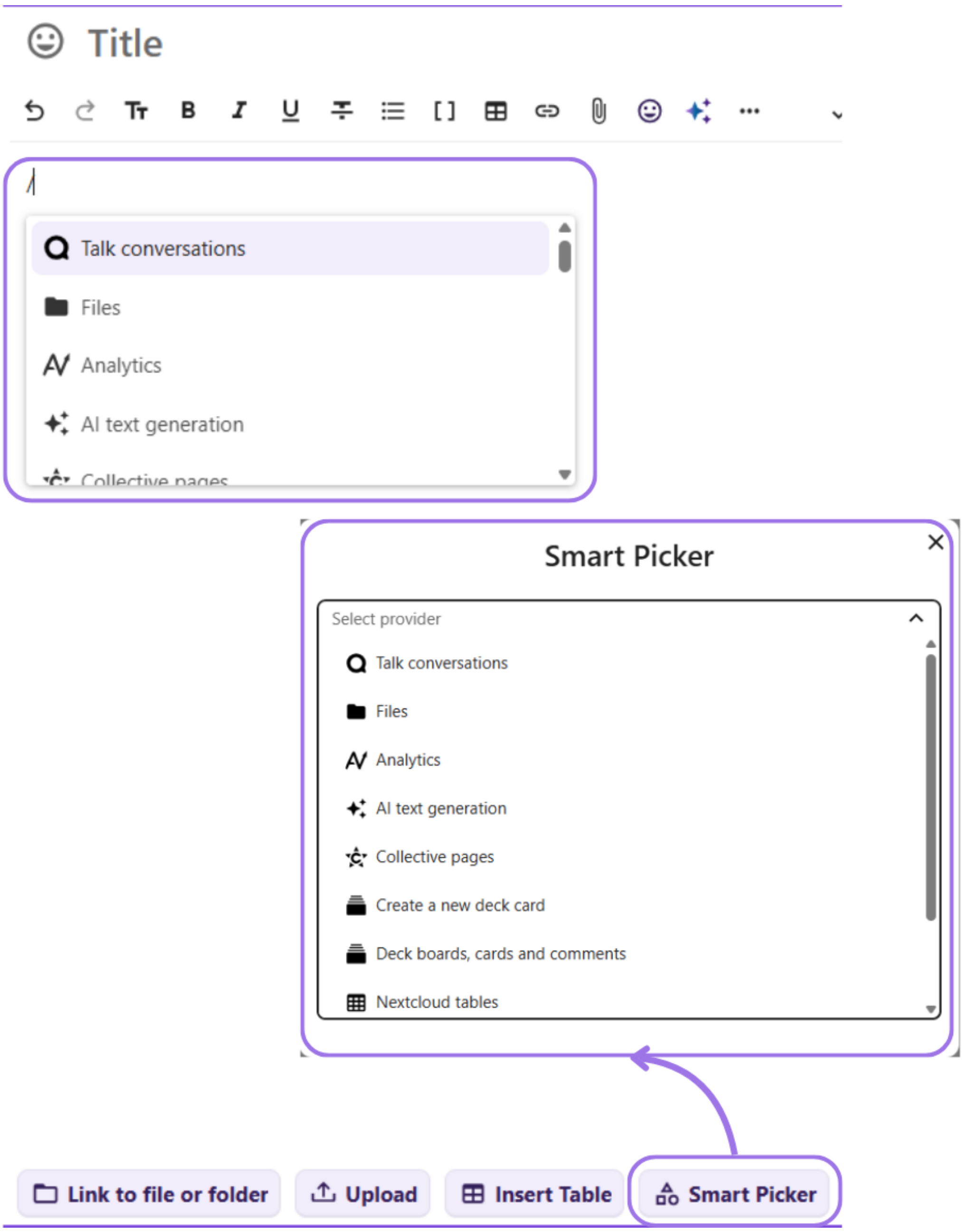
30 Build page in collective

Steps:

1. Open **Collectives**.
2. In the left panel under **Select a collective**, choose the Collective you want to work in.
3. Click **+** next to the Collective title to create a new main page.
4. Click **+** next to any existing page to create a subpage under it.
5. Repeat as needed — there's no fixed nesting limit.

Embedding other tools inside a page

A **Collective page** is not limited to text. You can embed tools and content directly into a page, turning it into a central workspace rather than simple documentation.



31 Using apps in collective pages

Inside the editor:

- Link to file or folder
- Upload
- Insert table
- Smart Picker

With the smart picker (select the option or type / in the editor):

- Talk conversations
- Files and folders

- Other Collective pages
- Deck boards and cards
- Create a new Deck card
- Tables
- Polls
- Office document sections
- External links
- Other available integrations in your portal

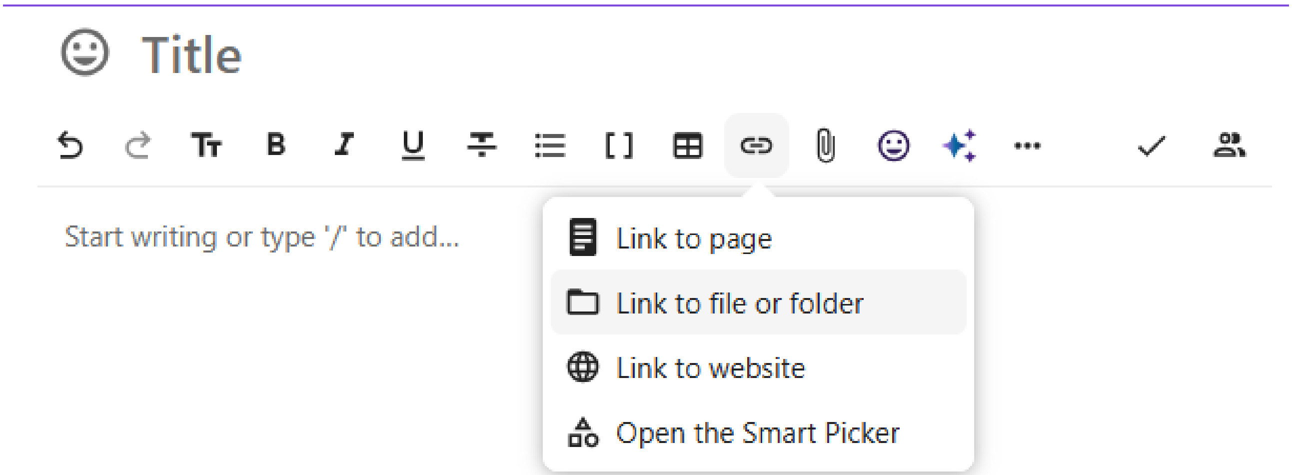
This allows a page to act as a **team dashboard**, where important tools are visible directly inside the notebook.

Steps:

1. Open a page in your **Collective**.
2. Click inside the editor.
3. Select the **Smart Picker** or type "/" in the editor.
4. Choose the item you want to embed.
5. Insert it into the page.

Linking pages and resources

Collective pages are stored as files. This means you can link to other pages in the same way you link to files or folders.



32 Connects contents in collective

You can use the link function to connect:

- Other Collective pages
- Files
- Folders

- Relevant documents

This makes it easy to build structured navigation between pages and key resources.

Steps:

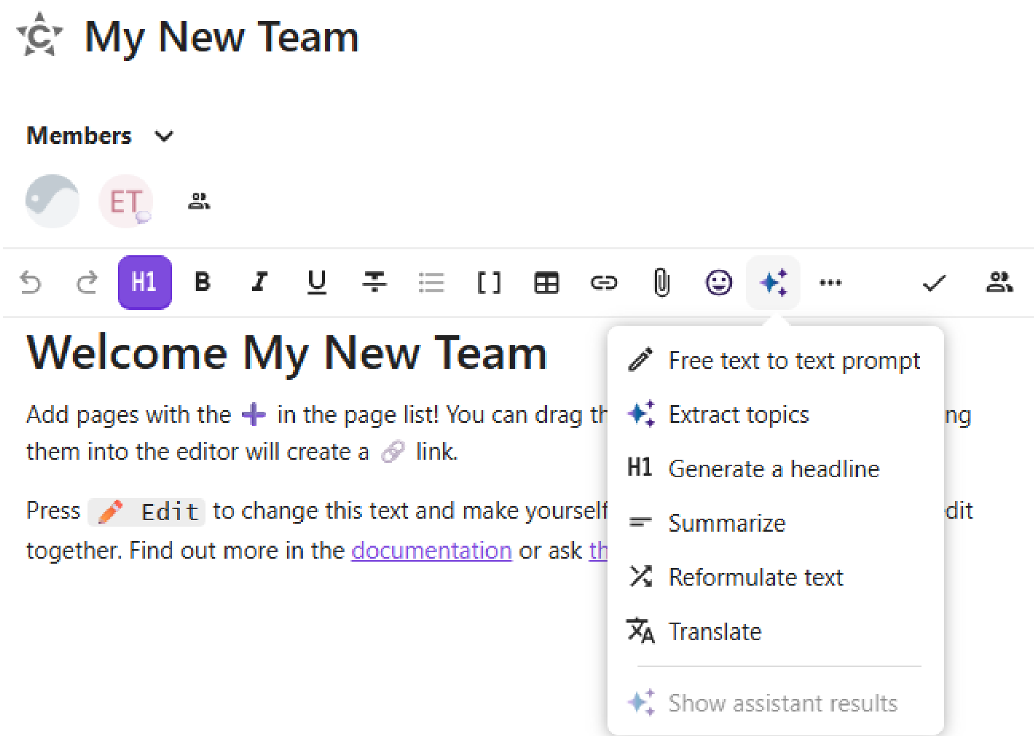
1. Open a page in your Collective.
2. Place the cursor where you want the link.
3. Click the **link icon (🔗)**.
4. Choose **Link to file or folder**.
5. Search for and select the Collective page, file, or folder.
6. Confirm to insert the link.

You can use this to connect:

- “Start here” → Meeting notes
- Meeting notes → Decision page
- Decision page → Supporting files

Click the **sparkles icon** icon to access AI features:

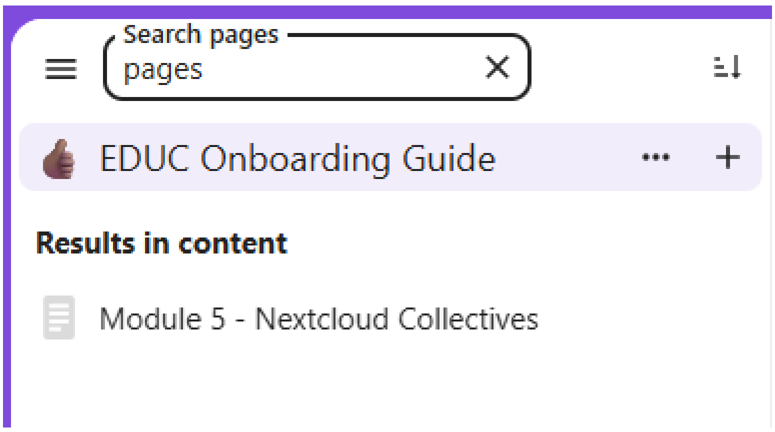
- Generate headlines
- Summarise text
- Rephrase content
- Extract topics
- Translate text



33 Embedded AI in collective

Finding content

As the Collective grows, navigation becomes important.



34 Search contents in collective

You can:

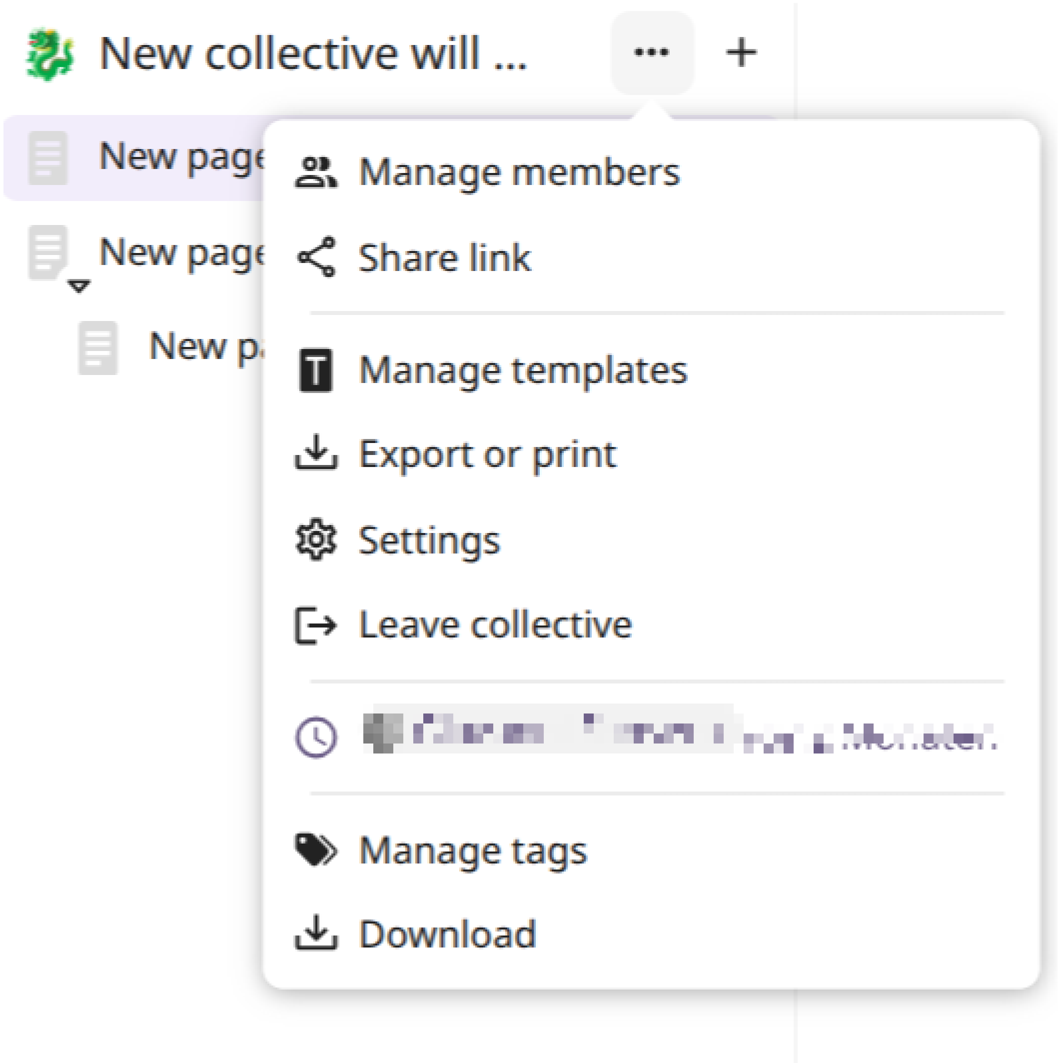
- Navigate using the page tree
- Search by page title
- Use “search pages” to find content inside pages

Steps:

1. Use the left page tree to navigate.

2. Use the search field above the page list.
3. Use unified search in the top bar if needed.

Collective options



35 Collective options

The three-dot menu provides access to additional Collective management and collaboration features:

Manage members *(owners/creators only)* – Add, remove, or modify member permissions within the Collective.

Share link – Create and manage public sharing links to provide external access to Collective content.

Manage templates – Create, edit, or select page templates that can be used when creating new pages, helping to maintain a consistent structure and formatting across the Collective.

Export or print – Export Collective content in a supported format or generate a printable version of a page.

Settings *(owners only)* – Configure Collective-specific settings and management options.

Leave Collective – Remove yourself from the Collective and revoke your access to its content.

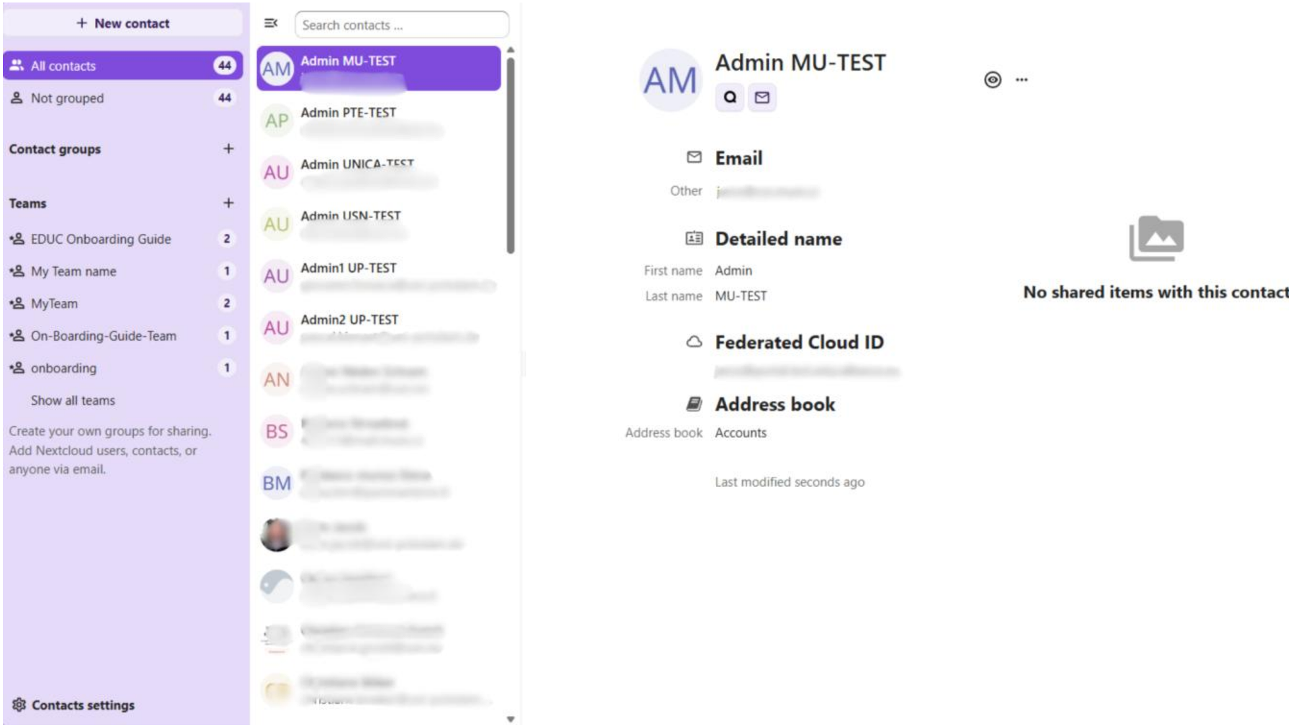
Manage tags – Create and organise tags to categorise pages and improve content discoverability.

Download – Download the Collective content for offline access or local storage.

Contacts

Direct access https://portal.educalliance.eu/apps/contacts/.

Manage **people and Teams** in the EDUC portal.



36 Contacts

If you synchronise your Outlook or iOS contacts with EDUC Portal, the contacts become available within the platform.

To synchronise and import contacts go to Import and synchronise contact inside Contacts:

The **Contacts** section serves as:

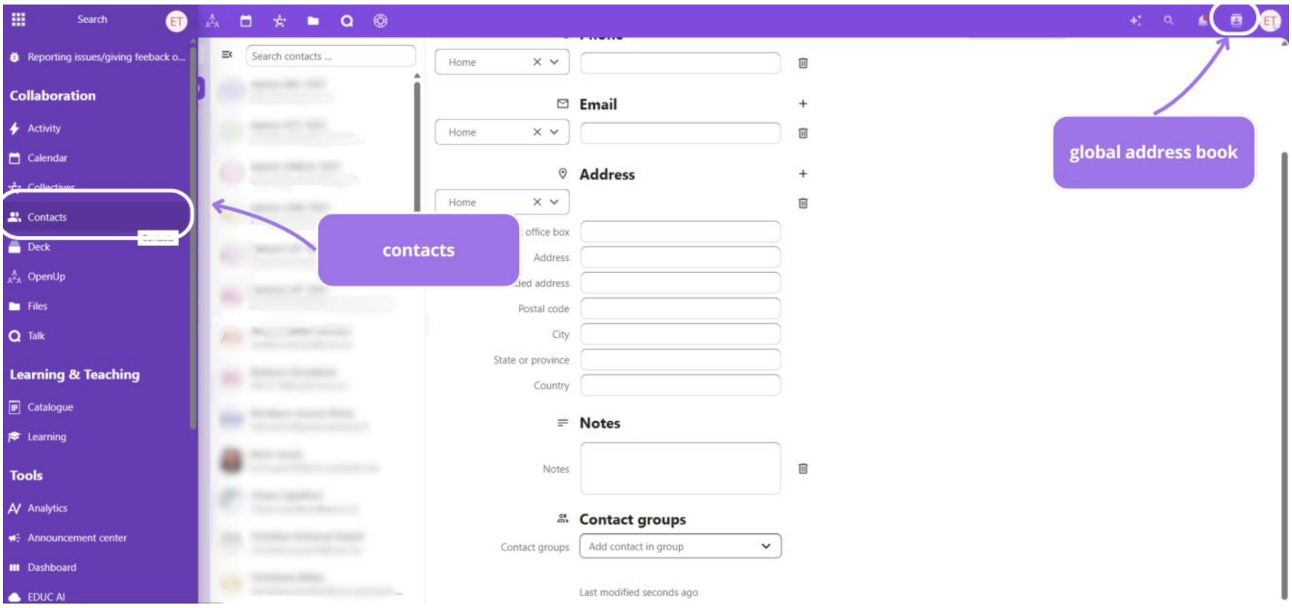
- A directory of users.
- A space to create and manage Teams.
- A central location for sharing and collaboration settings.

Accessing Contacts

Direct link https://portal.educalliance.eu/apps/contacts/

To open **Contacts click on** side menu. On the top menu give access to the Global Address book

1. Use the left panel to navigate between:
    - **All contacts**
    - **Teams**



37 Accessing contacts

Finding and managing people

The **Contacts** section allows you to search for and view users in the system.

To find and view a contact:

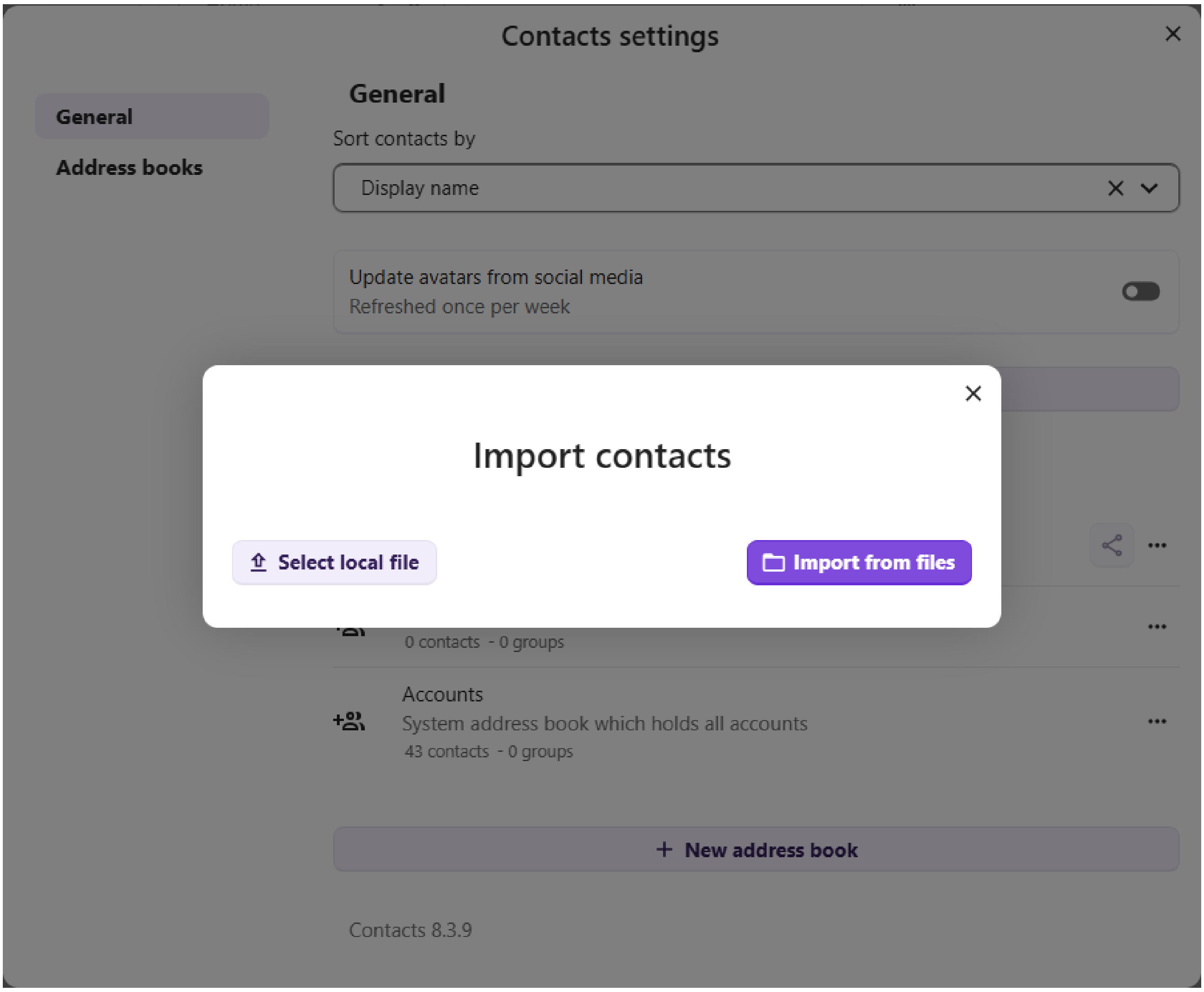
- Open **Contacts**.
- Use the search field to find a person.
- Click on a contact to view details.
- Use the available options to:
    - Add the contact to a team.
    - Share items.
    - View basic information.

Quick note: Contacts is primarily used as a lookup and connection tool, not a full profile management system.

Import and synchronise contact inside Contacts

To synchronise and import your contacts:

- Click on **Contact settings**.
- Select **Import contacts**.
- Choose how to import your contacts:
    - Select **Local file** to import contacts from your device.
    - Select **Import from files** to import contacts from platform files.

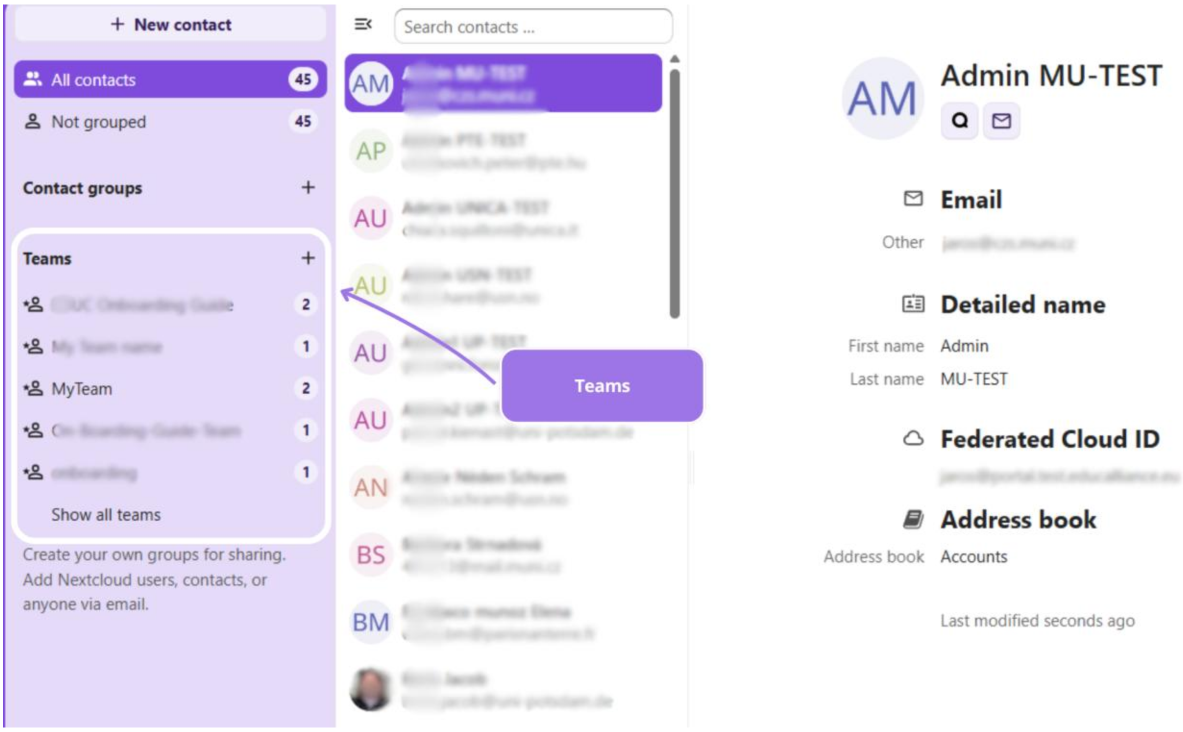


38 Import contacts

1. Export first: Go to your current provider (Google Contacts, iCloud, or Outlook) and choose Export. Select the vCard format (or .vcf).
2. Open Open the Contacts app.
3. Click on Settings (the gear icon) in the bottom left corner.
4. Import: Click Import contacts and upload the .vcf file you just exported.

Teams inside Contacts

Teams are managed inside Contacts and function as **collaboration groups**.



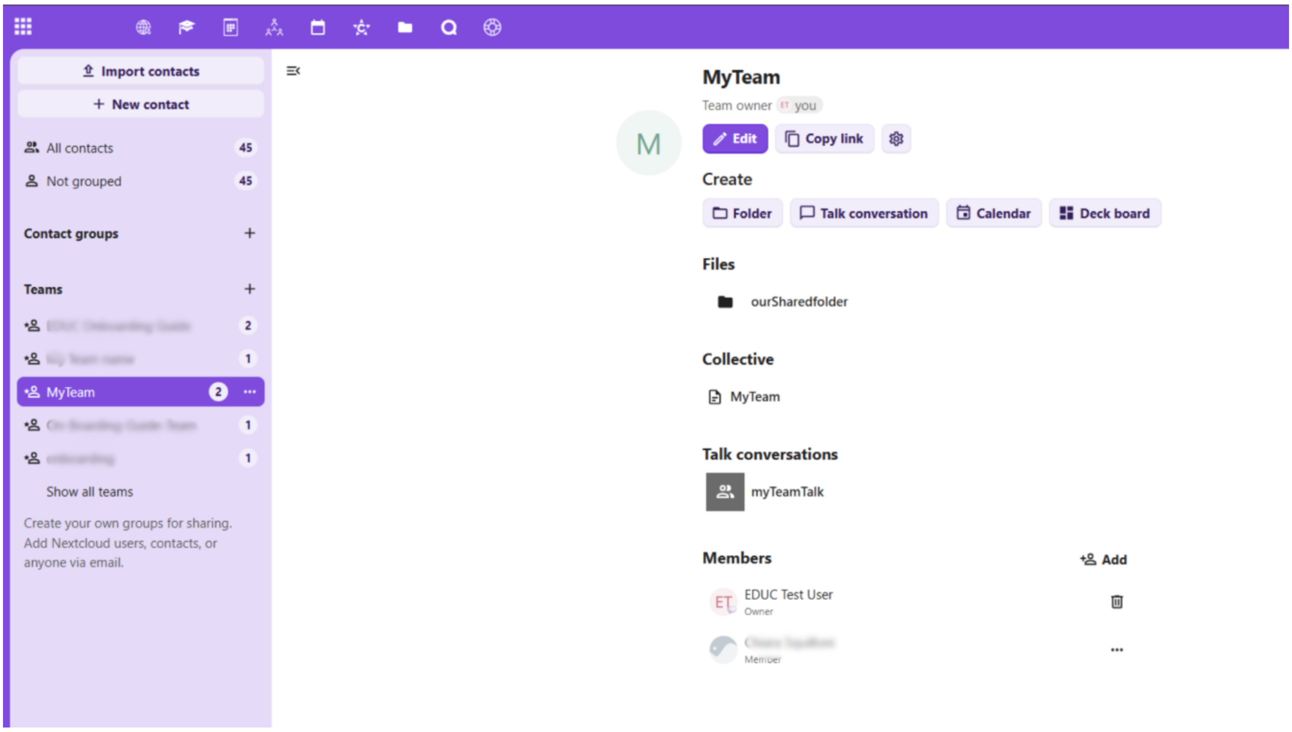
39 Team inside contacts

A team connects:

- People
- Talk
- Files
- Collectives
- Deck boards
- Calendar

To open a team:

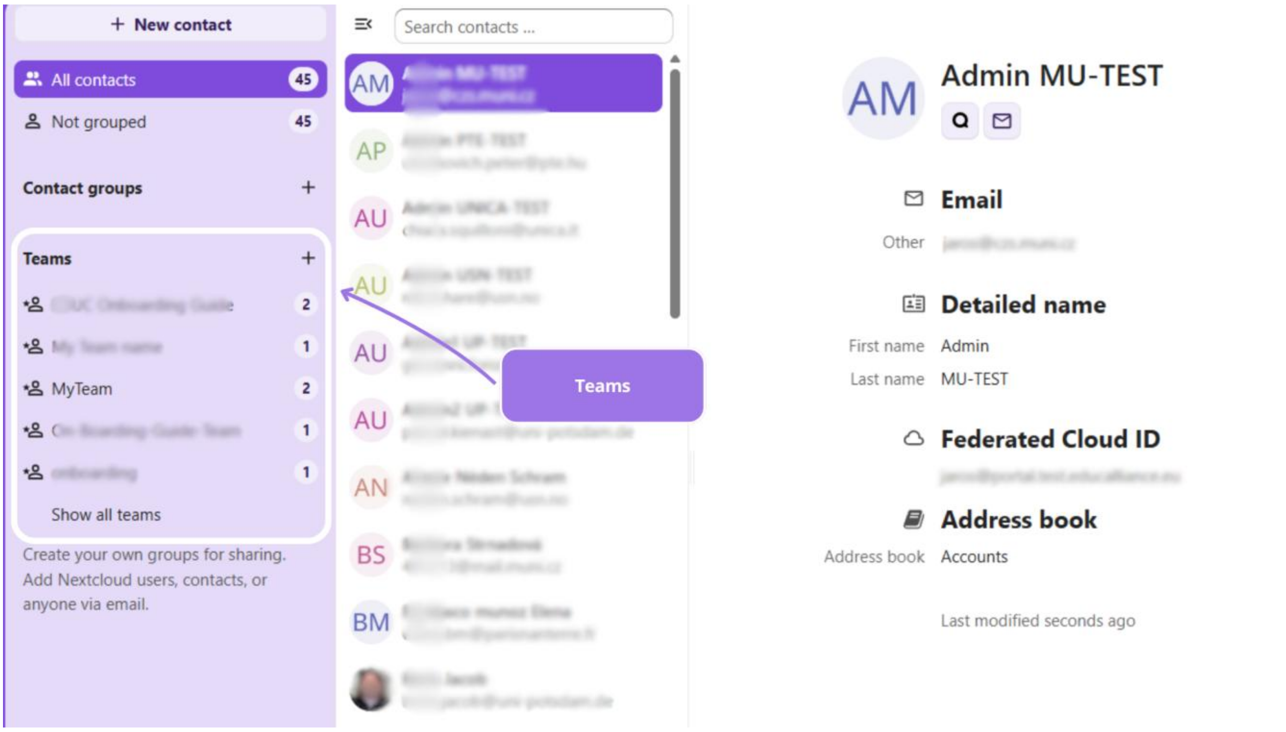
1. Open **Contacts**.
2. Select **Teams**.
3. Click on a team name to open its hub.



40 Team detail

Team

Teams are accessed from contacts (Contacts ⟶ Teams).



41 Team inside contacts

A **team** works as a collaboration hub that brings people together and connects the Apps used for shared work: chat (Talk), Wikis (Collectives), Kanban boards (Deck), tasks, calendar and shared entry points to files.

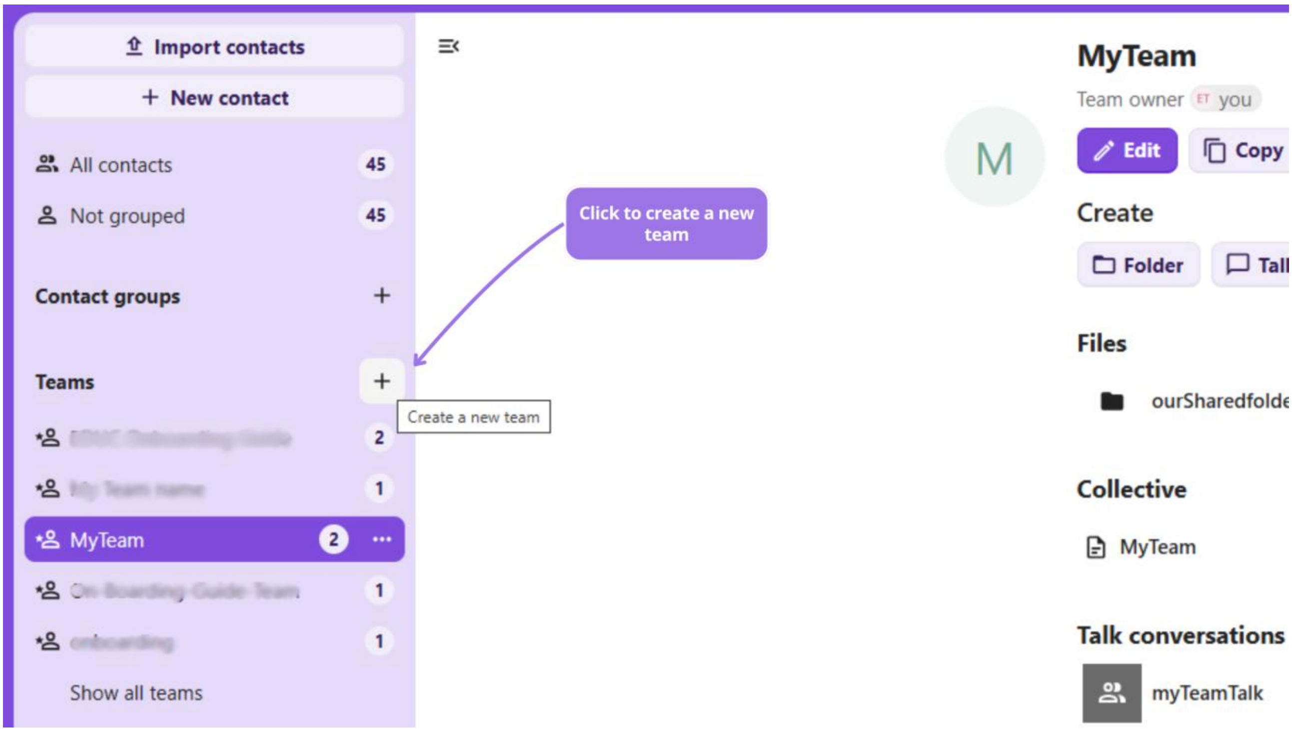
Talk conversations, files, calendars, and deck boards exist as independent objects and can be connected to others by adding entire teams and/or sharing with individual users.

This structure makes collaboration flexible in education. For example, a single chat can include multiple teams while still giving access to specific users who are not part of those teams.

Note: The **Teams** feature is historically known as **Circles** and is designed so that user-created teams can be used across applications for sharing and collaboration.

Creating a Team

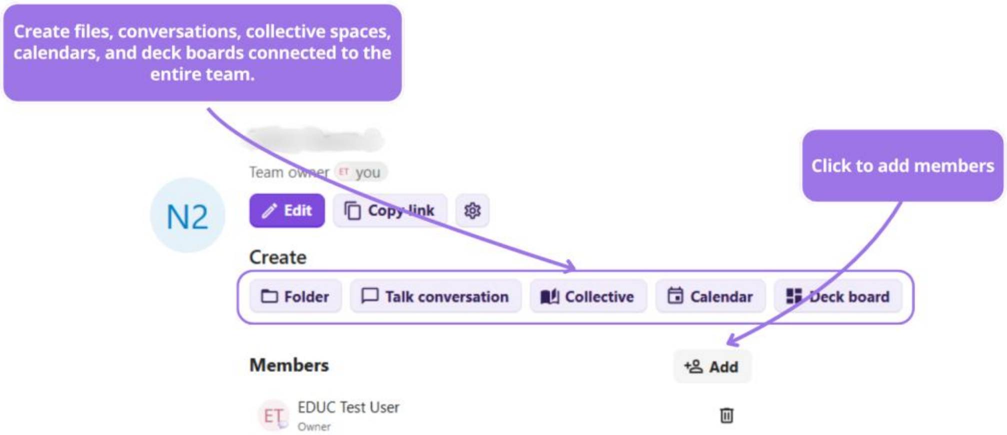
Teams are created directly inside Contacts.



42 Create a team

Steps:

1. Open **Contacts**.
2. Go to **Teams**.
3. Click **+** (create team).
4. Name the team.
5. Add members.



43 Manage team resources

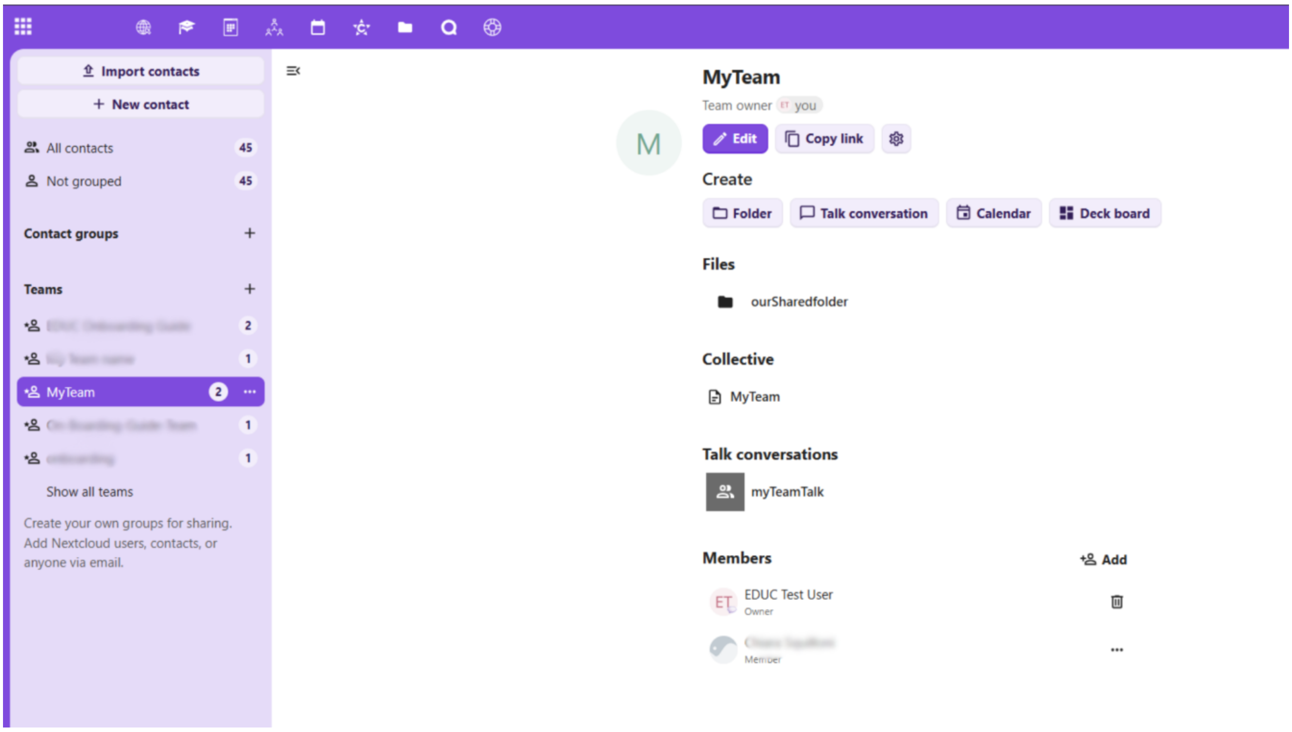
Quick note:
Teams can also be created indirectly (e.g., when creating a Collective), but it is recommended to create them here for better structure.

Accessing Teams

Once a team is selected is easy create a **Talk conversation**, **Collective**, **Calendar**, **Deck board**, or a shared **Folder**, and you'll also see the team's linked chats and files in one place.

Step-by-step actions:

1. Open **Contacts** (from the **side menu** or **top menu**, depending on your layout).
2. Inside Contacts, select **Teams**.
3. Click a team name to open its detail.



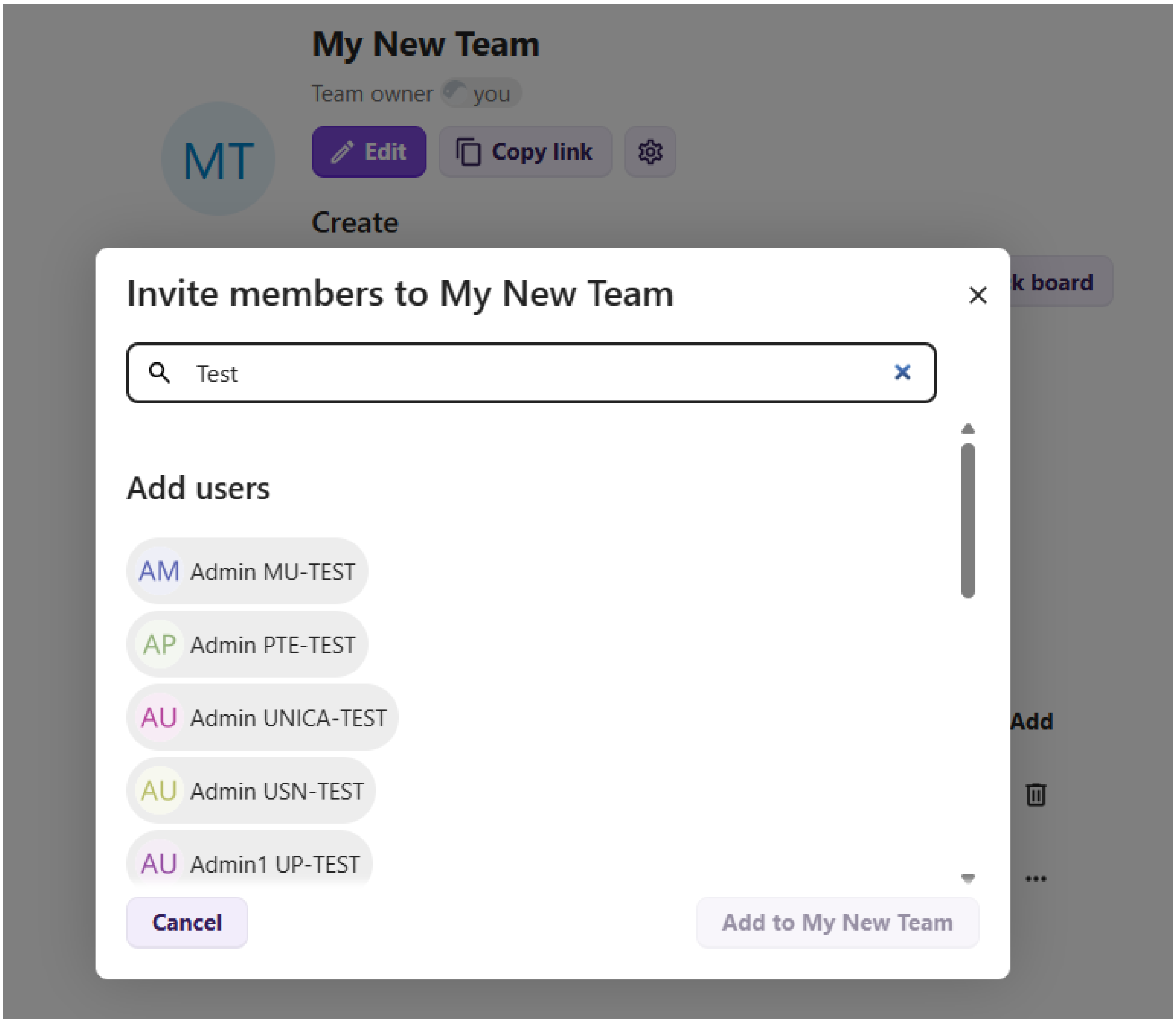
44 Accessing Teams

Managing team members

You can add or remove members from a team at any time.

Steps:

1. Open **Contacts → Teams**.
2. Search the team.
3. Click on the tree dots menu.
4. Select manage team..
5. Add or remove people.



45 Adding contacts in a team

Using Teams as a collaboration hub

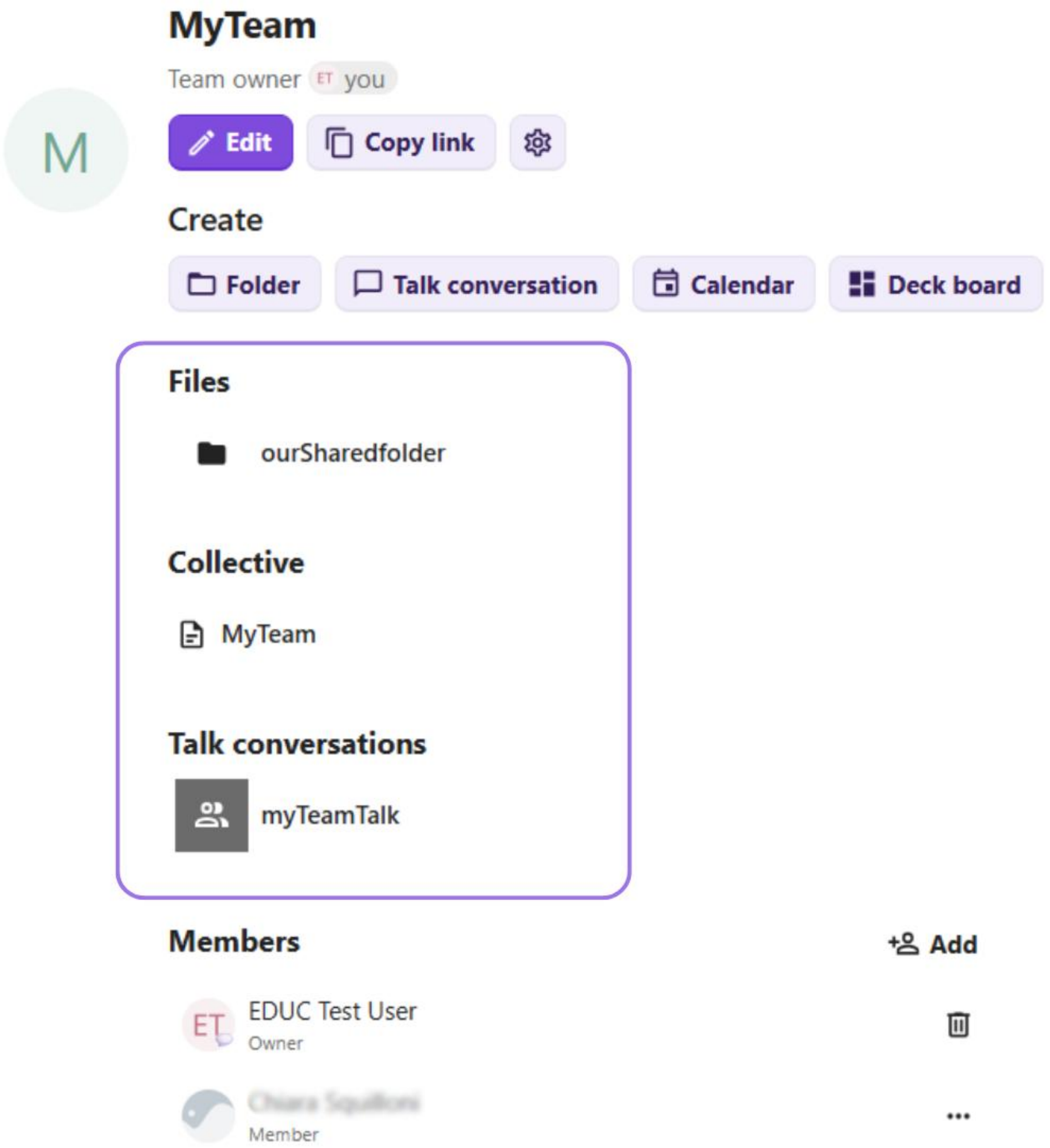
Each team acts as a central hub where you can create and access:

- Talk
- Collectives
- Deck boards
- Calendar
- Shared file entry points

Steps:

1. Open a team.
2. Use the **Create** options to add tools.

3. Scroll to see linked resources.



46 Connect apps in teams

Sharing with Teams vs individuals

Most items in EDUC Portal can be shared with:

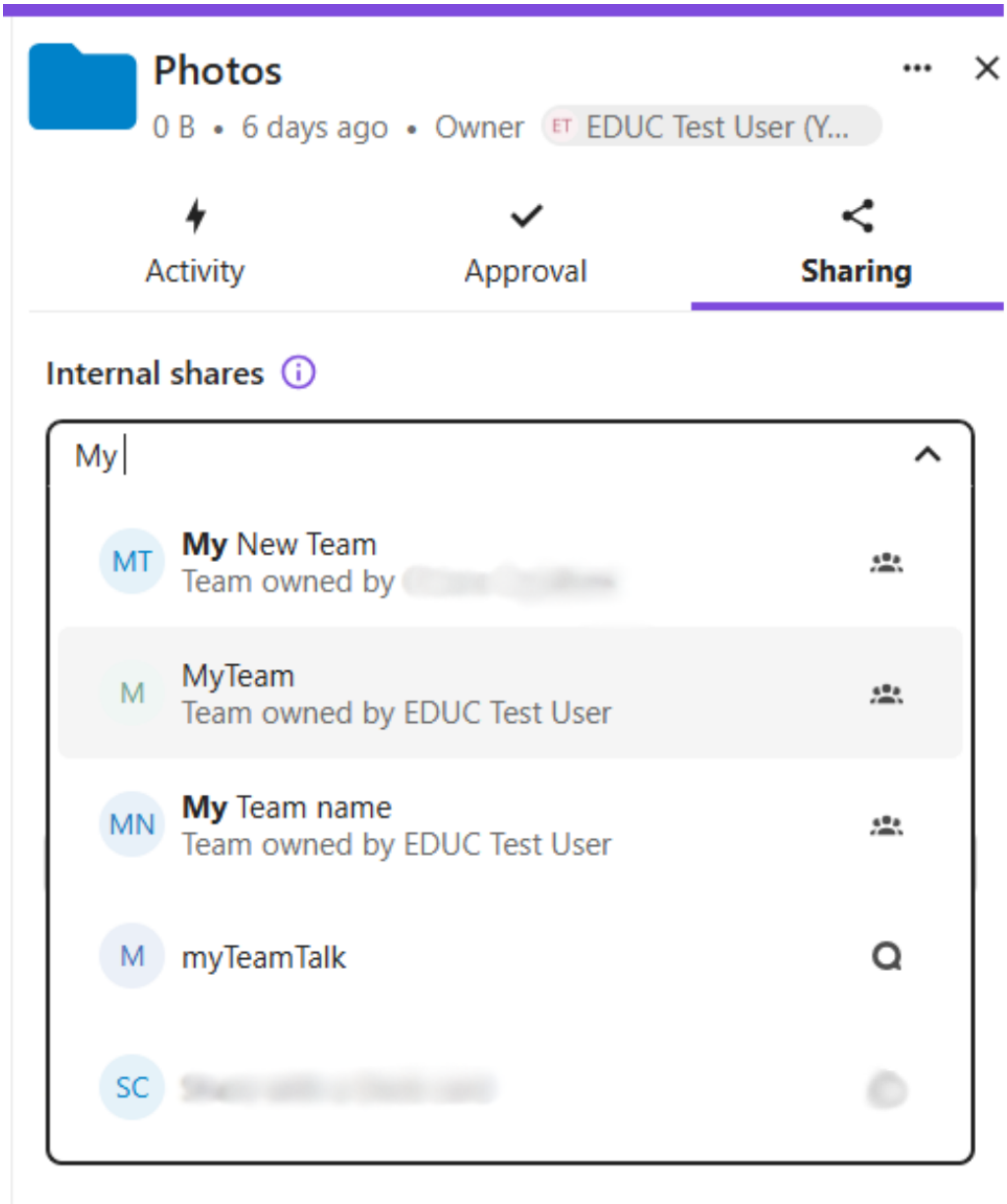
- **Entire Teams**, or
- **Individual people**

This allows flexible collaboration.

Steps:

1. Open a file, table, or other item.

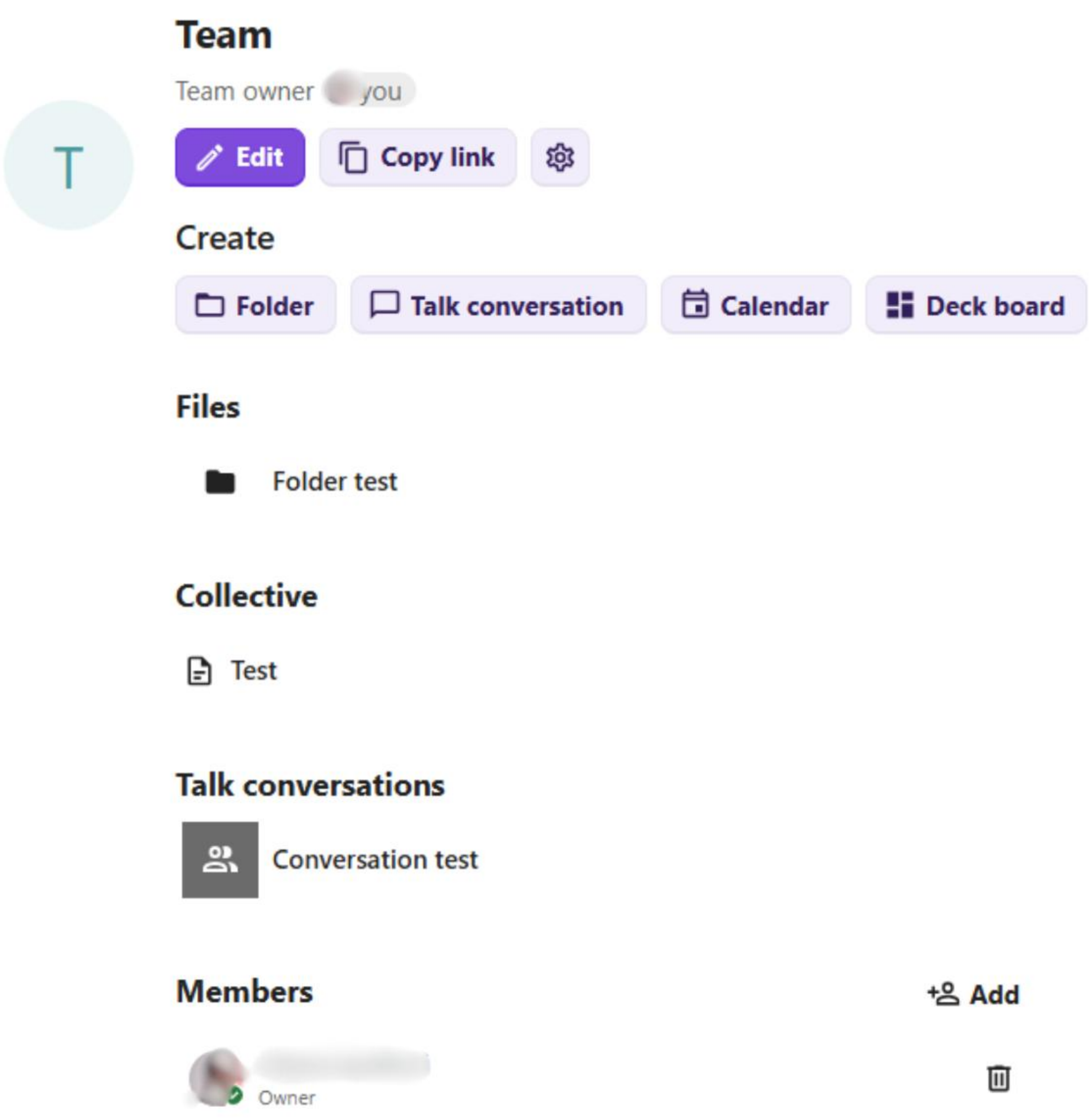
2. Click **Share**.
3. Under Internal shares, choose:
    - A **Team**, or
    - Specific **people**



47 Share resources with teams

Managing a Team

Under contacts the section Teams is the team's starting point, where you can quickly create or open collaboration tools such as **Talk**, **Collectives**, **Calendar**, **Deck**, and shared file entry points.



48 Team

Step-by-step actions:

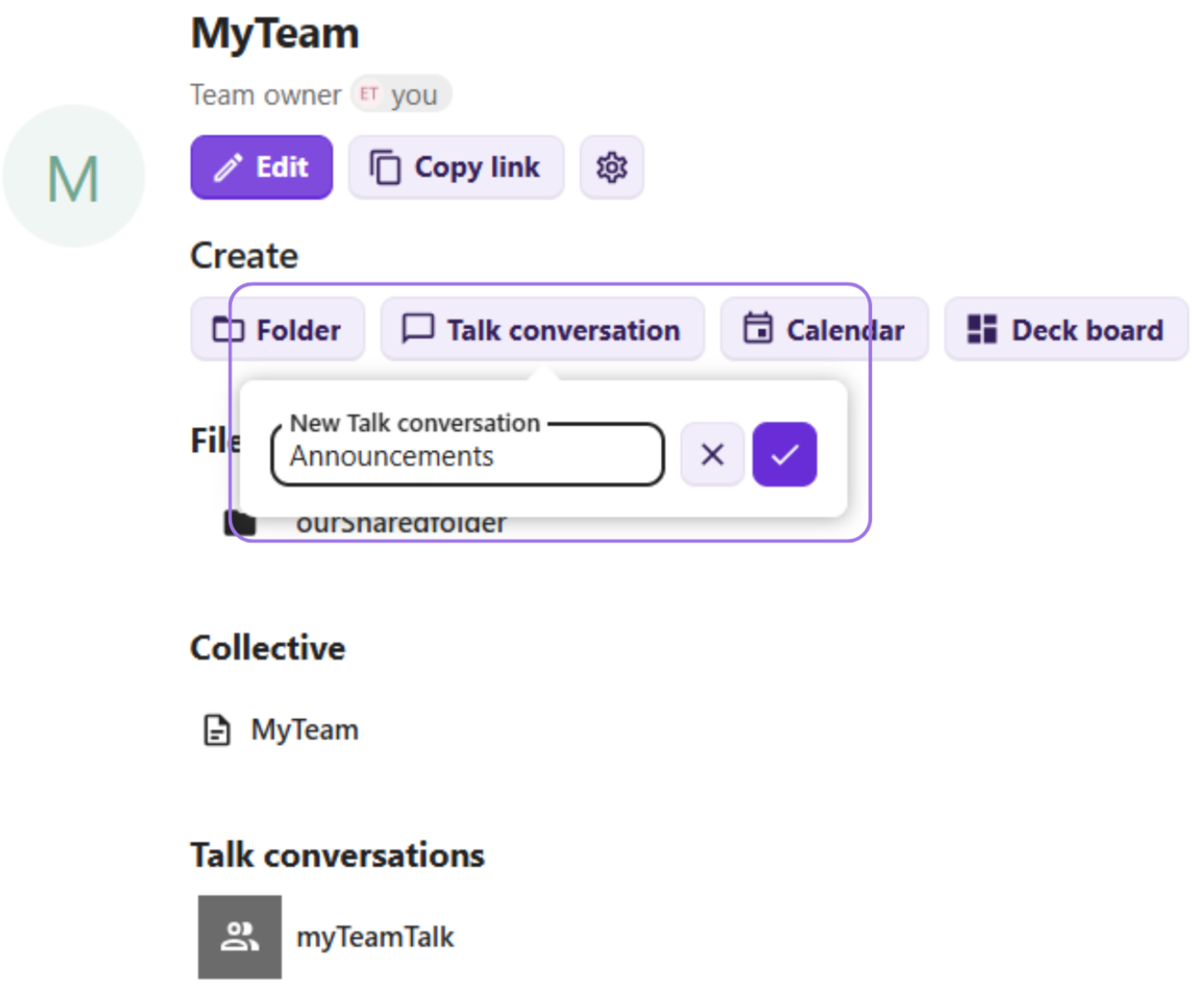
1. Open **Contacts → Teams** and select your team.
2. Use the **Create** shortcuts to add what the team needs:
   - **Talk conversation** (chat)
   - **Collective** (Wiki)
   - **Deck board** (Kanban board)
   - **Calendar** (events/deadlines)
   - **Folder** (shared entry point for files)
3. Scroll down to see existing linked **Talk conversations** and **Files**.

Talk conversations (chat) in Teams

Talk is used for day-to-day communication. A key difference is that conversations can be linked to **teams** and/or **individual people**, and one conversation can include multiple teams.

Step-by-step actions (create a team chat):

1. Open your team under contact section.
2. Click **Talk conversation**.
3. Give it a clear name (e.g., *General*, *Announcements*, *Project chat*).
4. Add the relevant **team(s)** and/or **individual people** if needed.



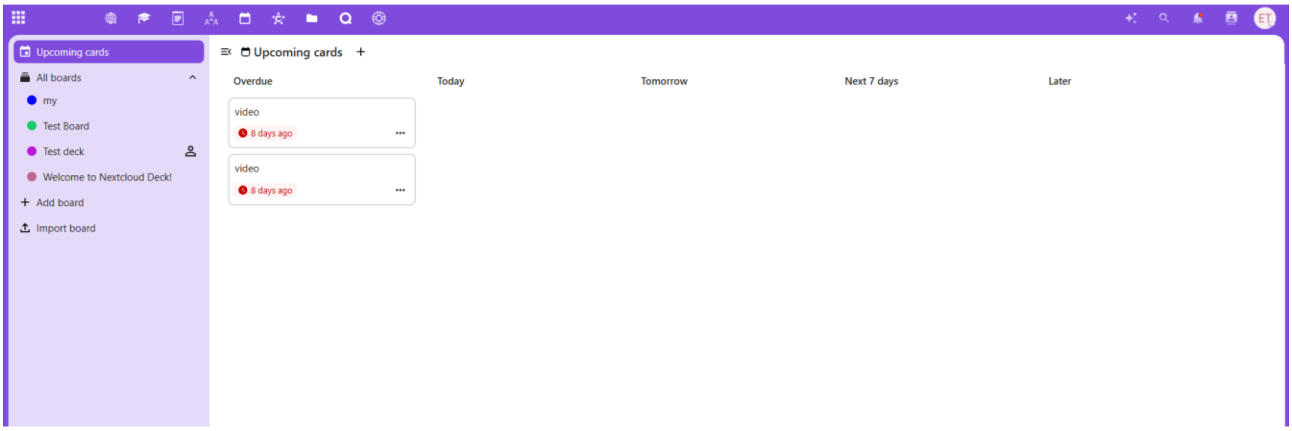
49 Create a talk for a team

Quick note: Removing a **team** from a conversation does not delete the conversation itself. The conversation can continue to exist and can still include other teams or individual users.

Deck

Direct access to deck https://portal.educalliance.eu/apps/deck/.

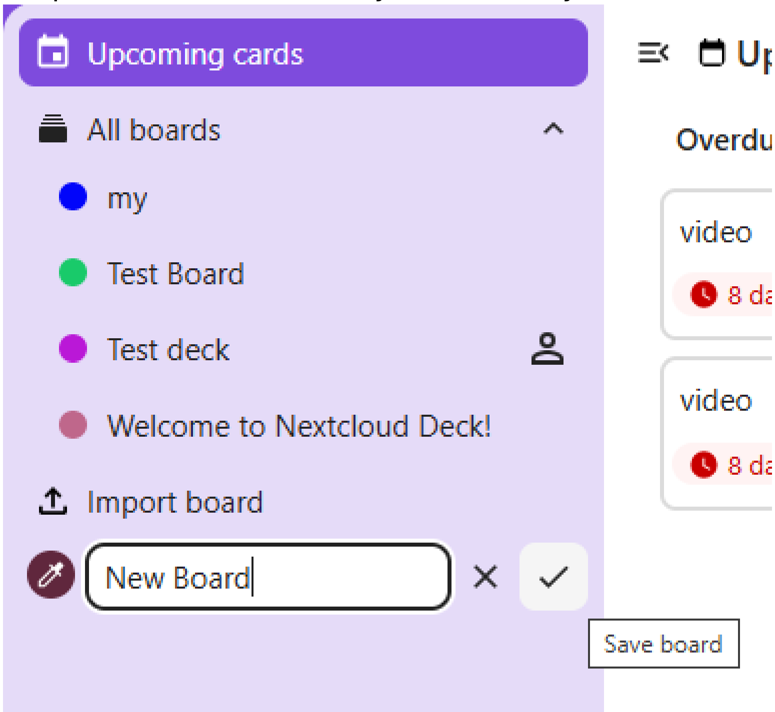
Deck is a workspace where you organise tasks and collaborate with others using boards, lists, and cards. Deck helps to monitor your projects by categorising activities (represented by cards) into the different lists.



50 Deck

How to create a new board

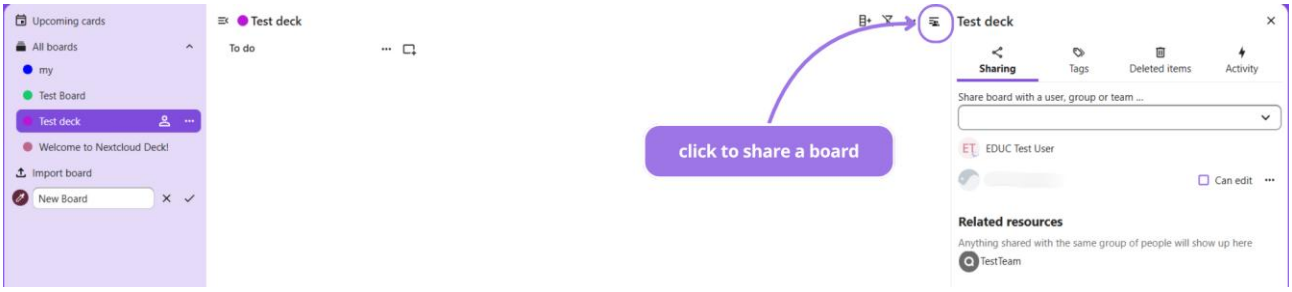
- Click **Add board** from the left menu
- Enter a board name and confirm with the checkmark
- Find the new board in the **All boards** section
- Use clear and specific names to identify boards easily later



51 Create a new board

How to share a board

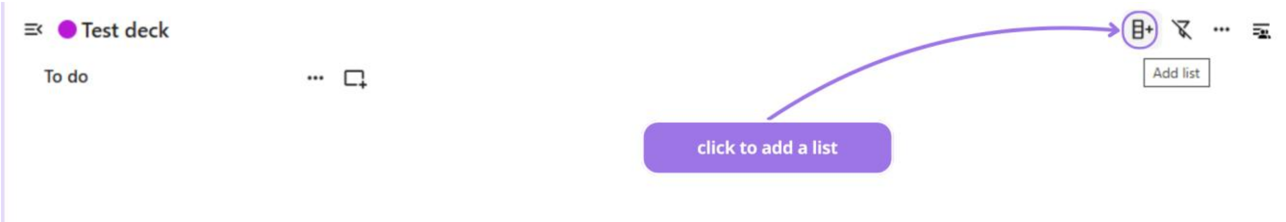
- Click the share icon in the top right corner
- Open the sharing panel on the right side
- Select users, groups, or teams from the dropdown menu
- Share the board to start collaborating with others



52 Share a board

Once shared, everyone involved will be able to access and work on the board together.

How to create lists



53 add a list in a deck

Each board supports a fully customised workflow, allowing you to organise tasks into different stages such as **To Do**, **In Progress**, and **Done, but not only, those lists can be what ever categories you would need for your monitoring board**.

Lists define the statuses that tasks can have within the board.

To create a list:

1. Enter the list name
2. Click **Add list**
3. View the new list at the top of the board

To add more lists:

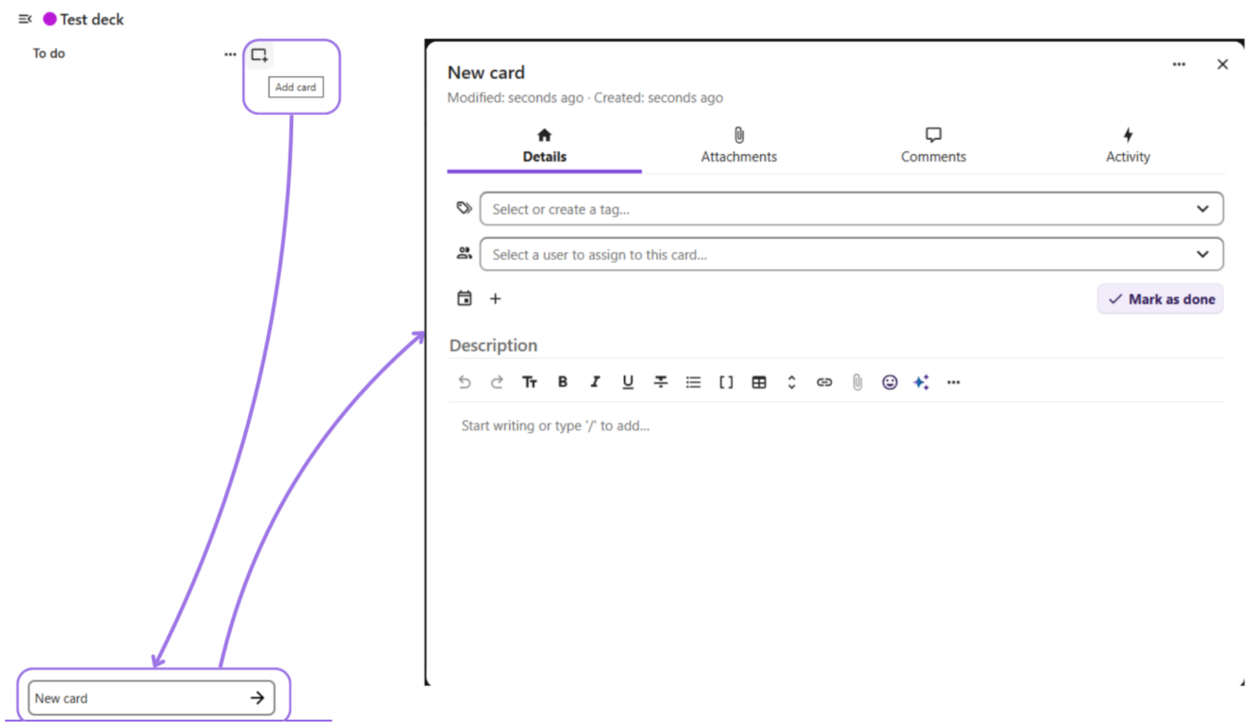
1. Click the add list icon in the top right corner
2. Create additional workflow stages as needed

To delete a list:

1. Click the three dots next to the list name
2. Select **Delete list**

What is a card and how to create it

Cards represent individual tasks within a list and help you organise, assign, and track work visually.



54 Add a card in a deck

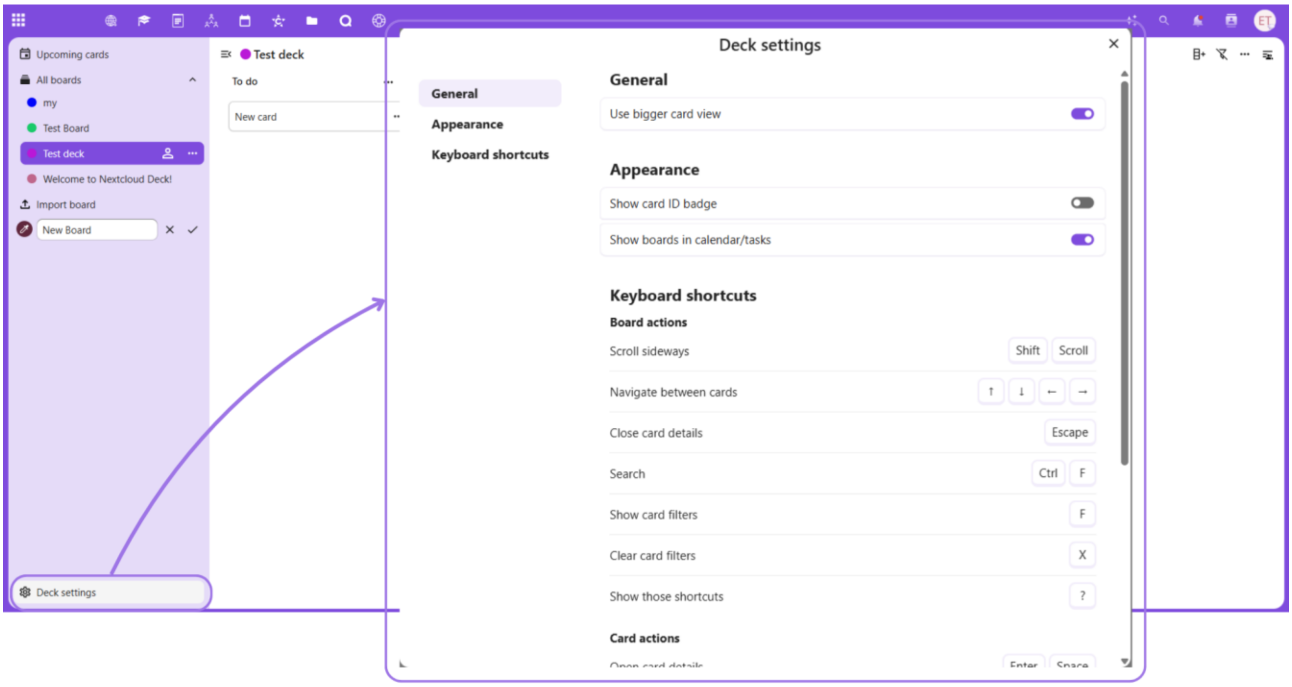
To create a card:

1. Click the card icon with the **+** symbol
2. Enter the card name
3. Confirm to add the card to the selected list

Click on a card to open and manage its content. You can:

- Add notes and descriptions with automatic saving
- Format text with headings, lists, tables, bold, italic, and underline
- Add tags to identify status or priority
- Filter cards by tags using the filter icon
- Assign tasks to users
- Set deadlines with quick options or custom dates
- Upload attachments from your device or the portal
- Add comments and feedback directly in the card
- Track updates and actions in the **Activity** section
- Click **Mark as done** to complete a task
- Drag and drop cards between lists to track progress visually

Deck Settings



55 Deck settings

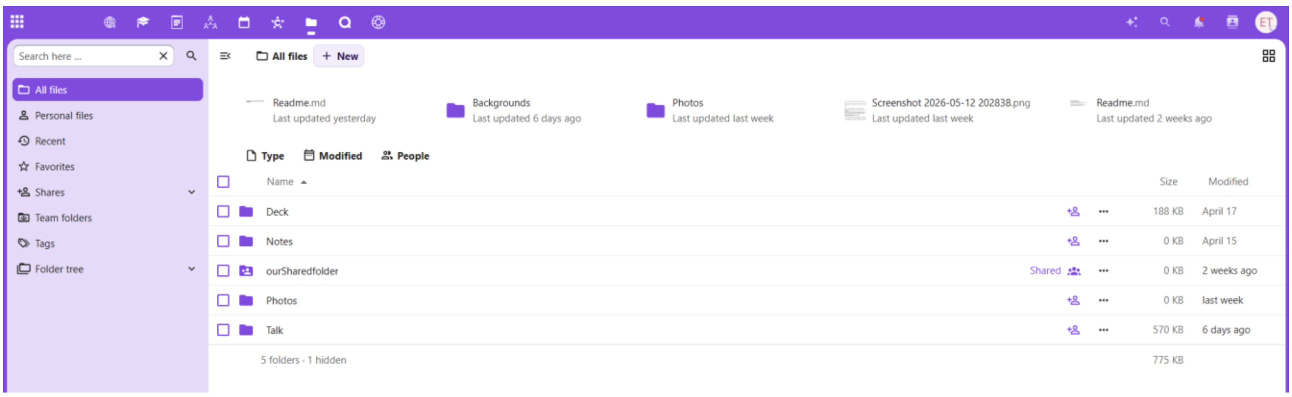
The Deck settings section includes three main areas:

- **General**: enable or disable the bigger card view
- **Appearance**: show card ID badges and display boards in Calendar and Tasks
- **Keyboard shortcuts**: use quick key combinations to manage boards and cards more efficiently

Files

Direct access https://portal.educalliance.eu/apps/files/.

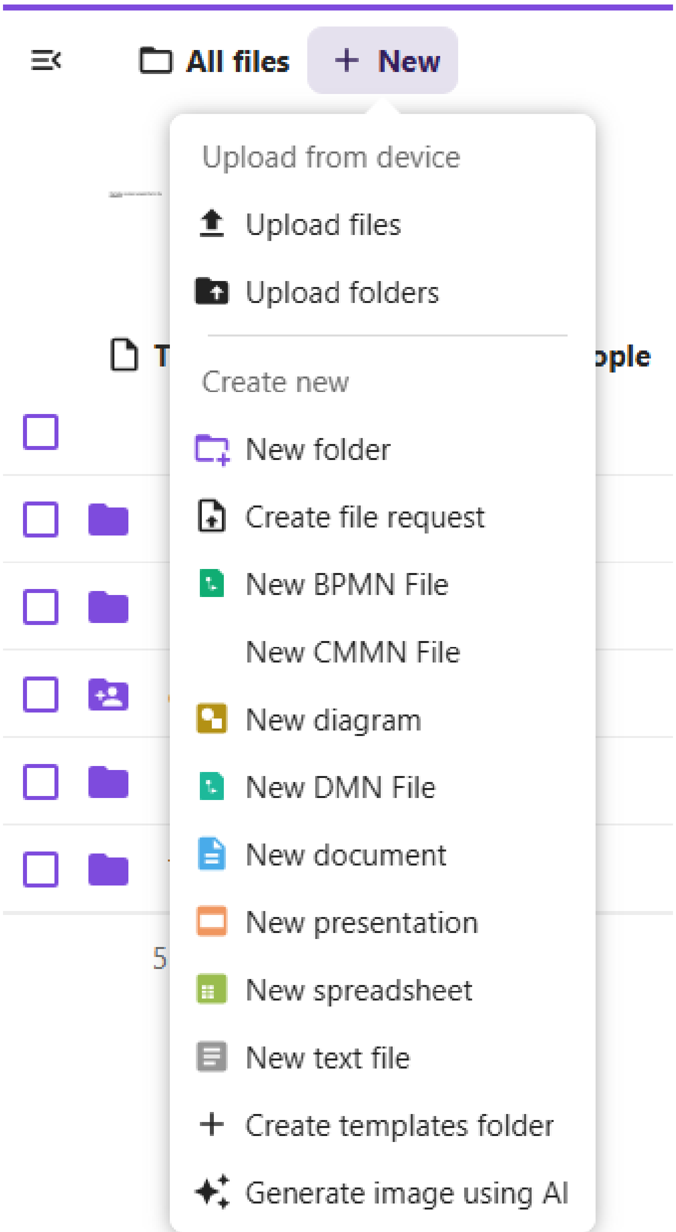
Store, organise, and share your documents securely in one place, accessible from any device. Use this app to store documents and collaborate by sharing work with colleagues across the alliance.



56 Files

“+ New” Button

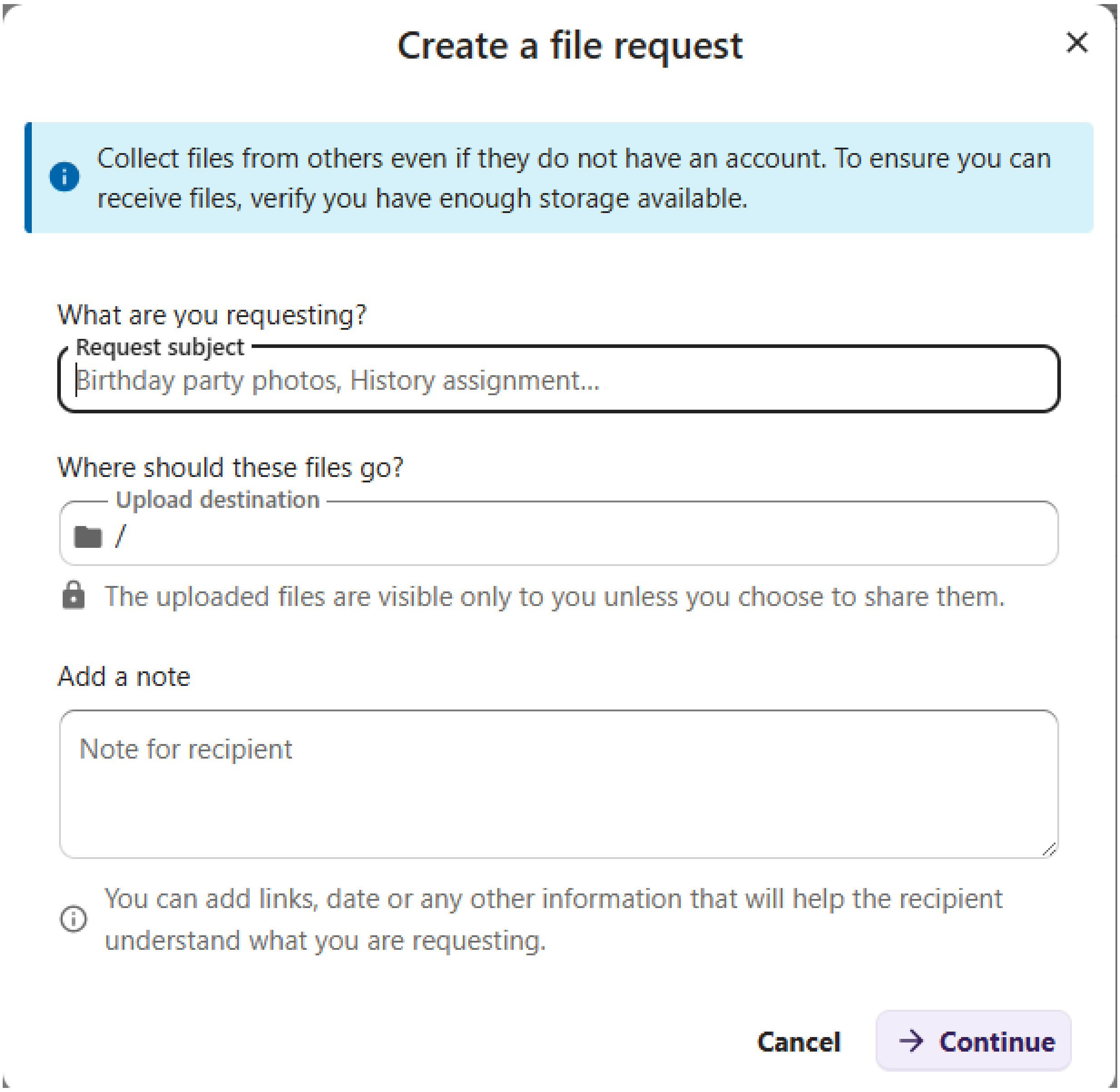
It allows to either upload content from your device or create new files directly within the portal.



57 Adding files

- <u>**Upload from device**</u>: this section allows you to upload content from your local device.
    - **Upload files** – upload one or multiple files
    - **Upload folders** – upload an entire folder, including all its contents, preserving the original structure.
- <u>**Create new**</u>: create new content directly within the portal.
    - **New folder –** Creates a new folder to organise files and documents.

- **Create file request –** Generates a request link that allows other users to upload files into a specific folder.

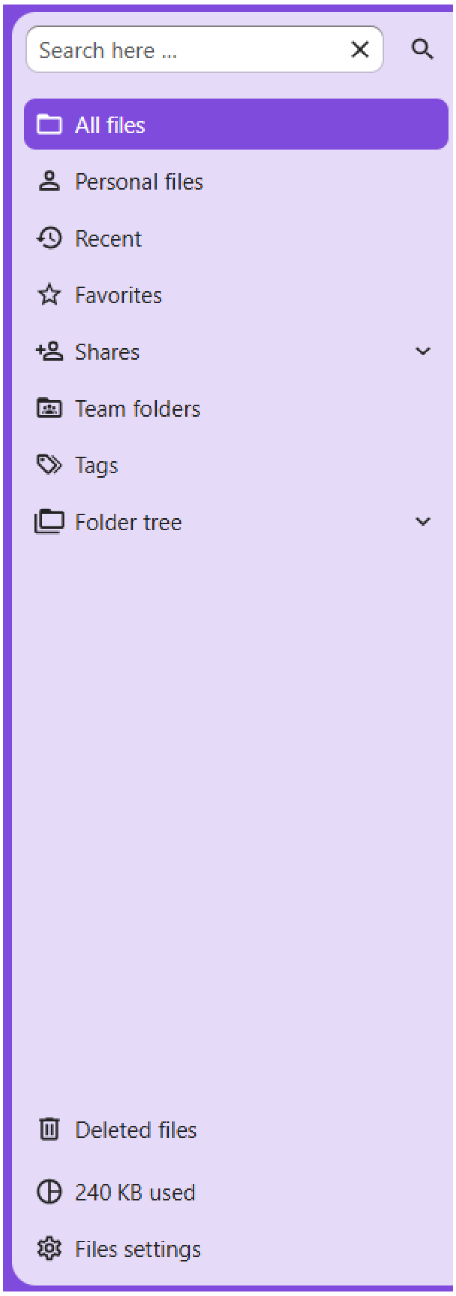


58 Create a file request

1. Write down what you are requesting in the section and select the destination folder where the uploaded files should be saved. Add any additional notes if necessary.
2. Click **Continue**.
3. Set an expiration date, if needed.
4. Set a password for access, if required.
5. Click **Continue** again.
6. A shareable link will be generated. Copy and share it or send it directly via email.

- **New document –** an editable online document similar to a Word document, but in format .odt by default.
- **New draw.io Diagram –** technical diagrams using draw.io.
- **New draw.io Whiteboard –** a collaborative digital whiteboard for brainstorming and teamwork.
- **New presentation –** an editable online presentation like PowerPoint but in format .odp.
- **New spreadsheet –** an editable online spreadsheet.
- **New text file –** a simple plain text (.md) file (like a note).
- **Create templates folder –** Creates a dedicated folder for reusable templates.
- **Add folder description**: allows you to add a description to a shared folder to explain its structure and contents. To display the content of the README.md file above the folder structure, the folder description option must be enabled in the folder settings.

Left side Menu



59 Left side menu in files

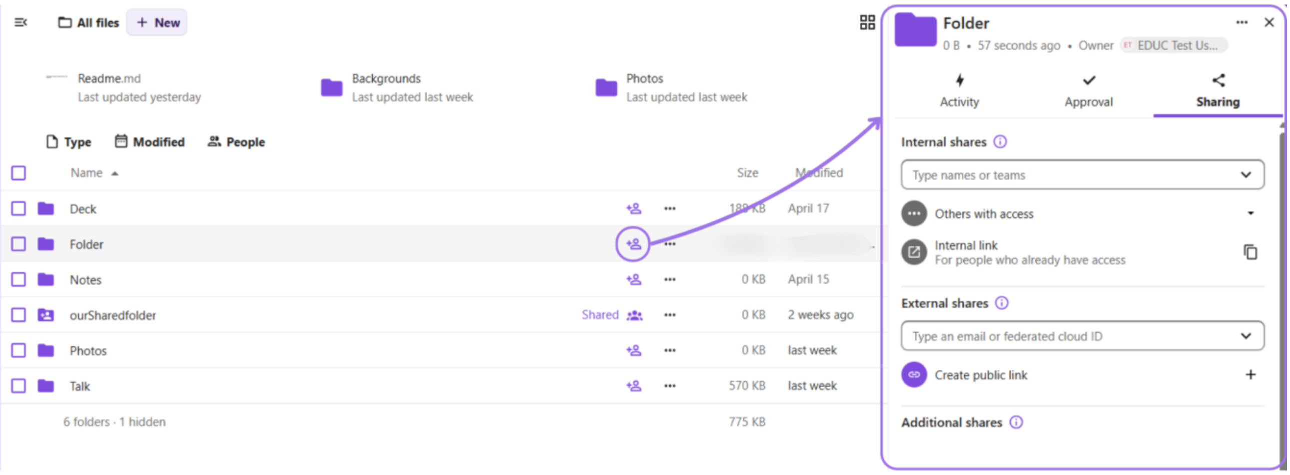
- **All files** – Displays all the files and folders you have access to, including personal and shared content.
- **Personal files** – Shows only the files and folders that belong to you and are not shared with others.
- **Recent** – Lists the files you have recently opened, edited, or uploaded.
- **Favorites** – Contains the files and folders you have marked as important for quick access.

- **Shares** – Displays files and folders that you have shared with others or that others have shared with you.
- **Team folders** – Includes shared folders created for collaboration within a team or group.
- **Tags** – Allows you to organise and find files using labels you have assigned to them.
- **Folder tree** – Shows the hierarchical structure of your folders, helping you navigate through them easily.

How to share a file or a folder

Follow these steps:

- Go to the file or folder you want to share.
- Select the icon with a purple outline of a person and a “+” sign next to the three dots (this is the share icon).
- Click the share icon.



60 Share a content in Files

You can choose whether to share the file **internally**, meaning with users who are already registered in the portal, or **externally**, meaning with users who are not part of the portal.

- **Internal shares** – Type the name of a user or a team to share the file or folder with them. To make access easier create an internal link for users who already have access.
- **External shares** – Type an email address to share the file or folder with external users. Create a public link to share the content.

Automatic Shared Folders

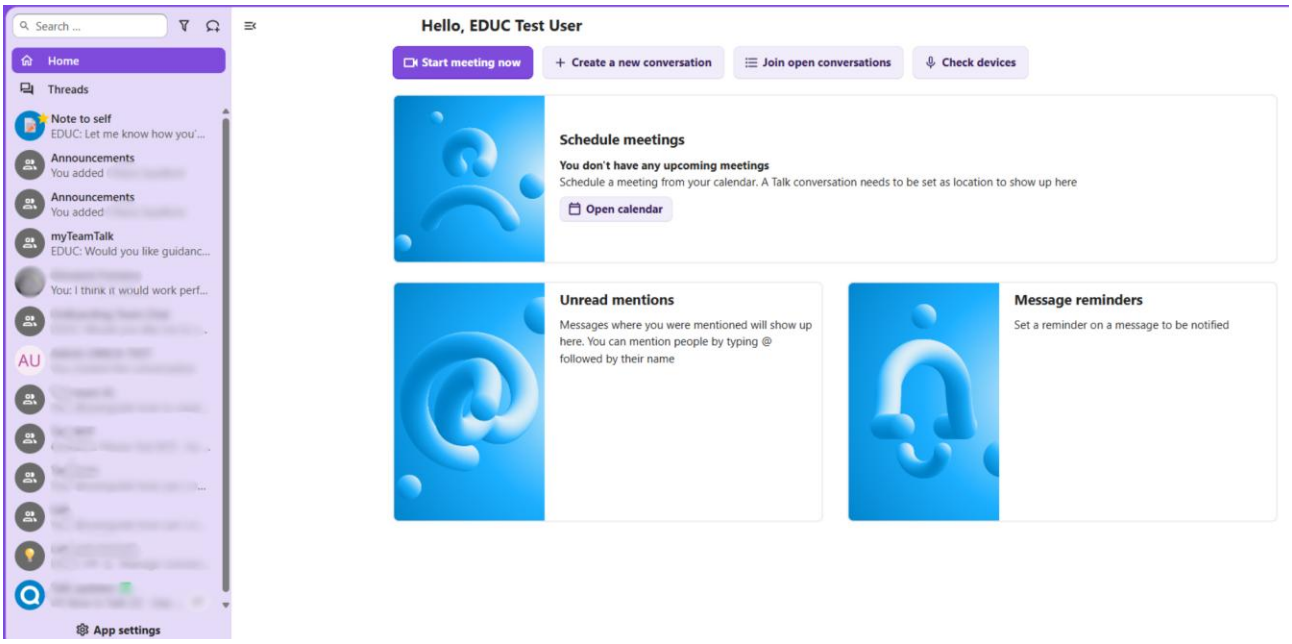
Any folders and files shared with a group or a team will automatically appear in your workspace. You can find these shared resources in the Team folders section of the left-side menu.

There is also a "Talk" folder. In this folder all the shared files in the conversations using Talk will be automatically saved.

Talk

Direct access: https://portal.educalliance.eu/apps/spreed/.

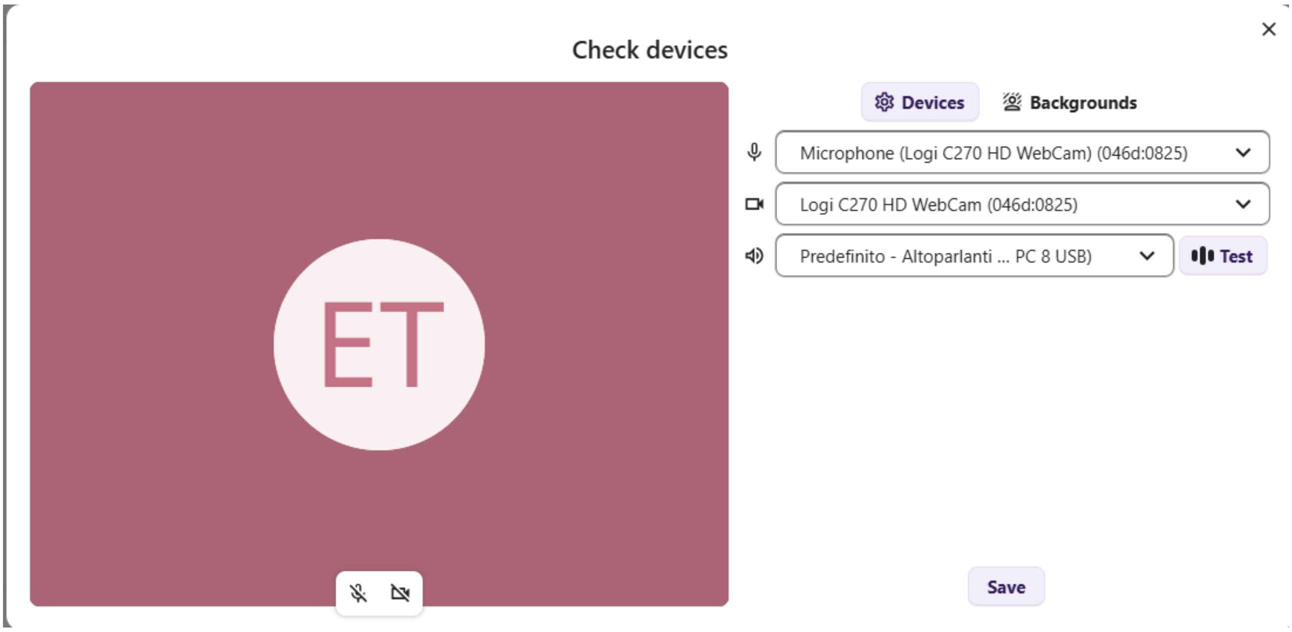
Opening **Talk**, the Home page provides quick access to meetings, conversations, and notifications.



61 Talk

At the top of the Home page of talk:

- **Start a meeting now**: instantly launch a new meeting. Use this option when you want to start a call immediately and invite participants.
- **Create a new conversation**: start a new chat (one-to-one or group). Create private conversations or group discussions with multiple participants.
- **Join open conversations**: Browse and join public or open conversations available.
- **Check devices**: test microphone, camera, and audio settings before joining or starting a meeting to ensure everything works properly.



62 Check devices

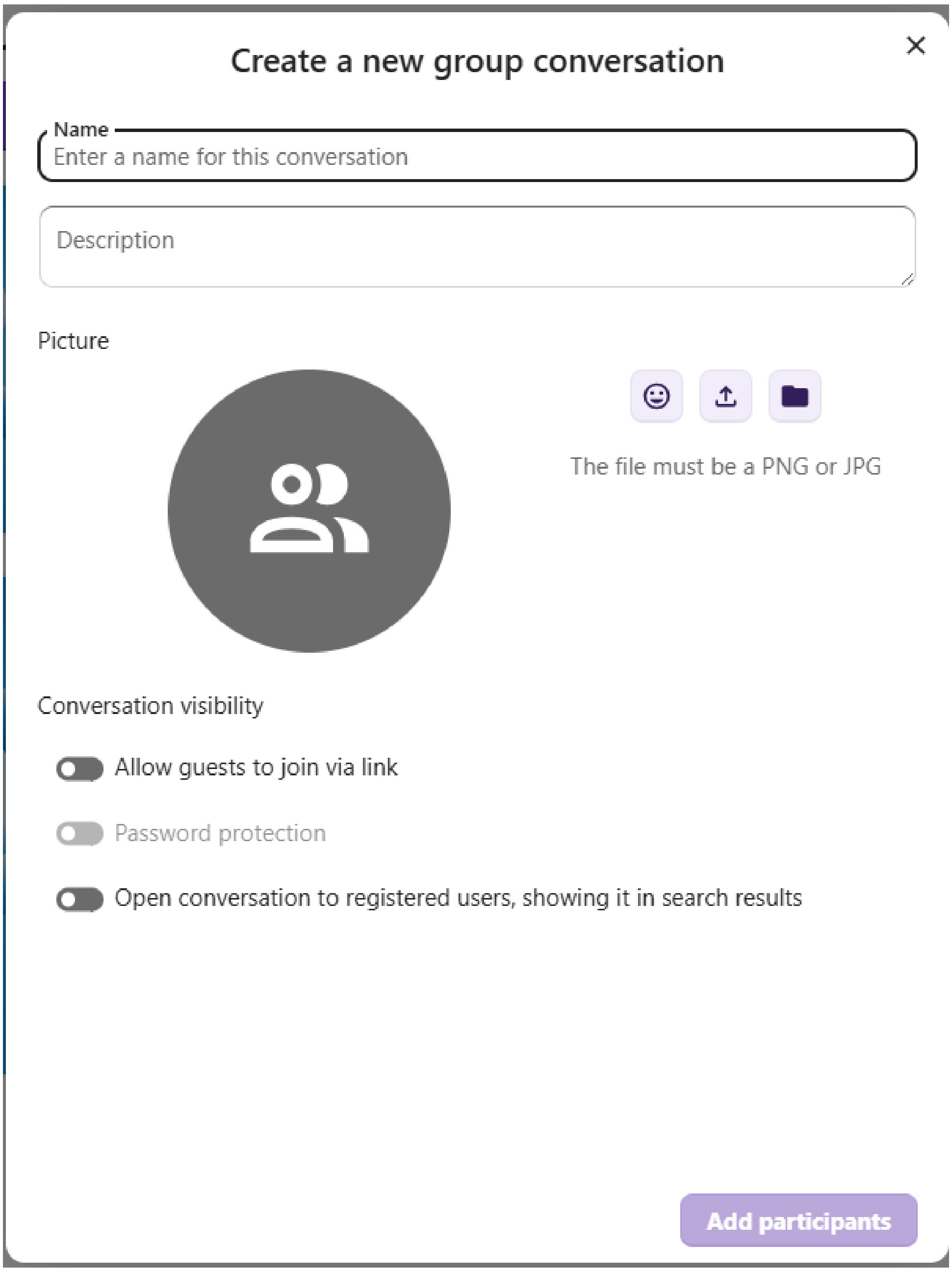
In the home overview:

- **Schedule Meetings**: this section allows you to schedule meetings by clicking *Open calendar* to set up a new meeting.
- **Unread Mentions**: this section shows messages where you have been mentioned. When someone tags you using **@yourname**, the message appears here, helping you quickly identify items that require your attention.
- **Message Reminders**: set reminders for specific messages so you don't forget important information or for requested actions you are not able to do at the moment you saw that message (like a snooze feature).

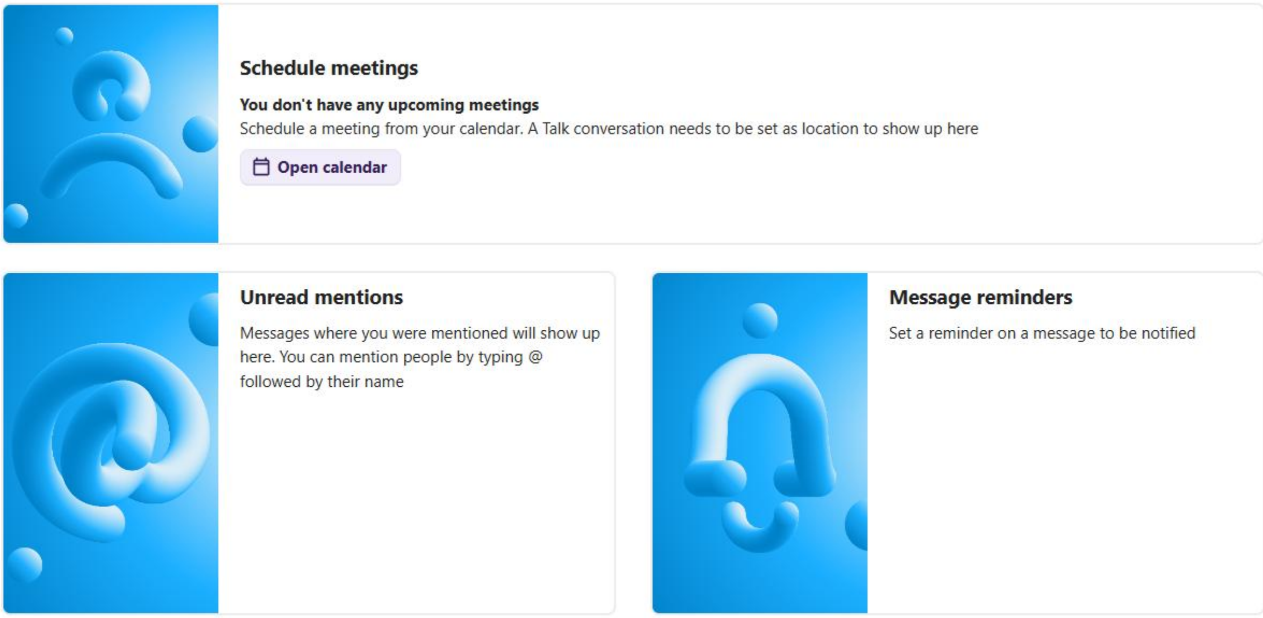
How to create a new group conversation

To create a group conversation:

- Click **Create Conversation** to open the setup page.
- Enter a name for the group.
- Add a description.
- Upload an image to represent the group.

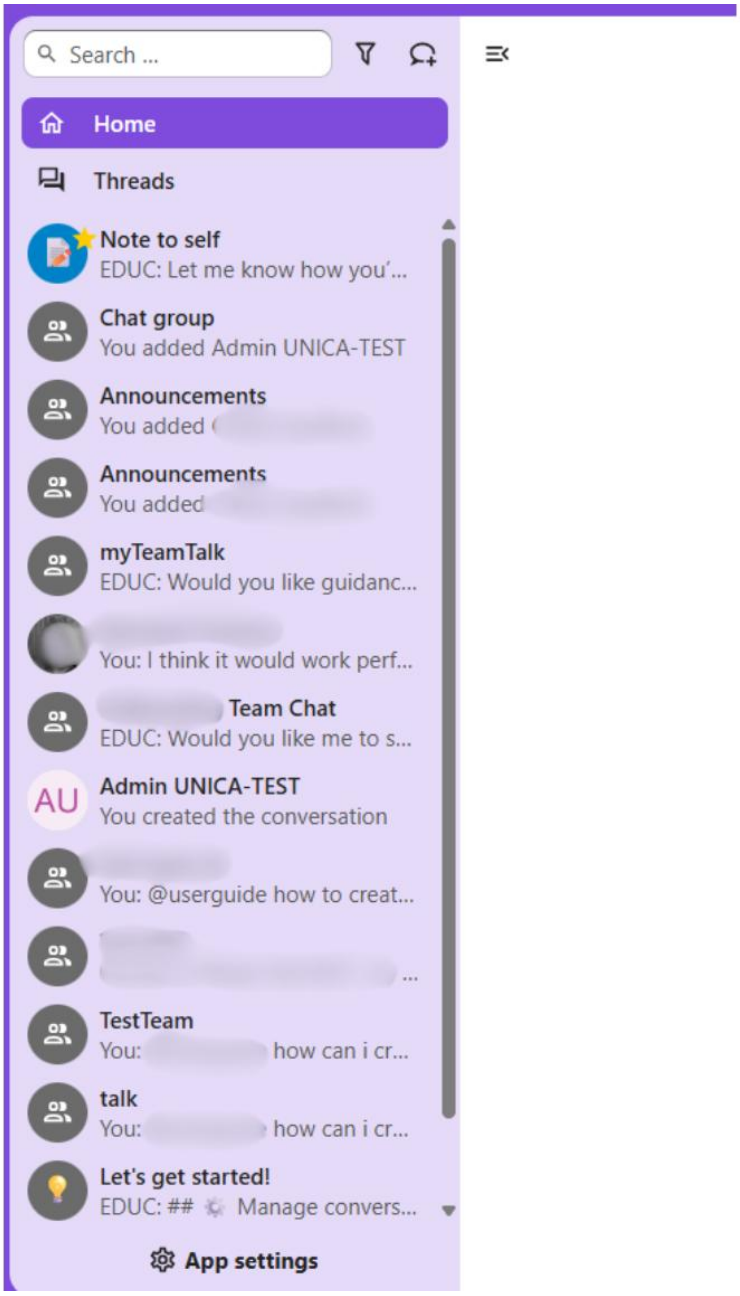


63 Create a new chat group



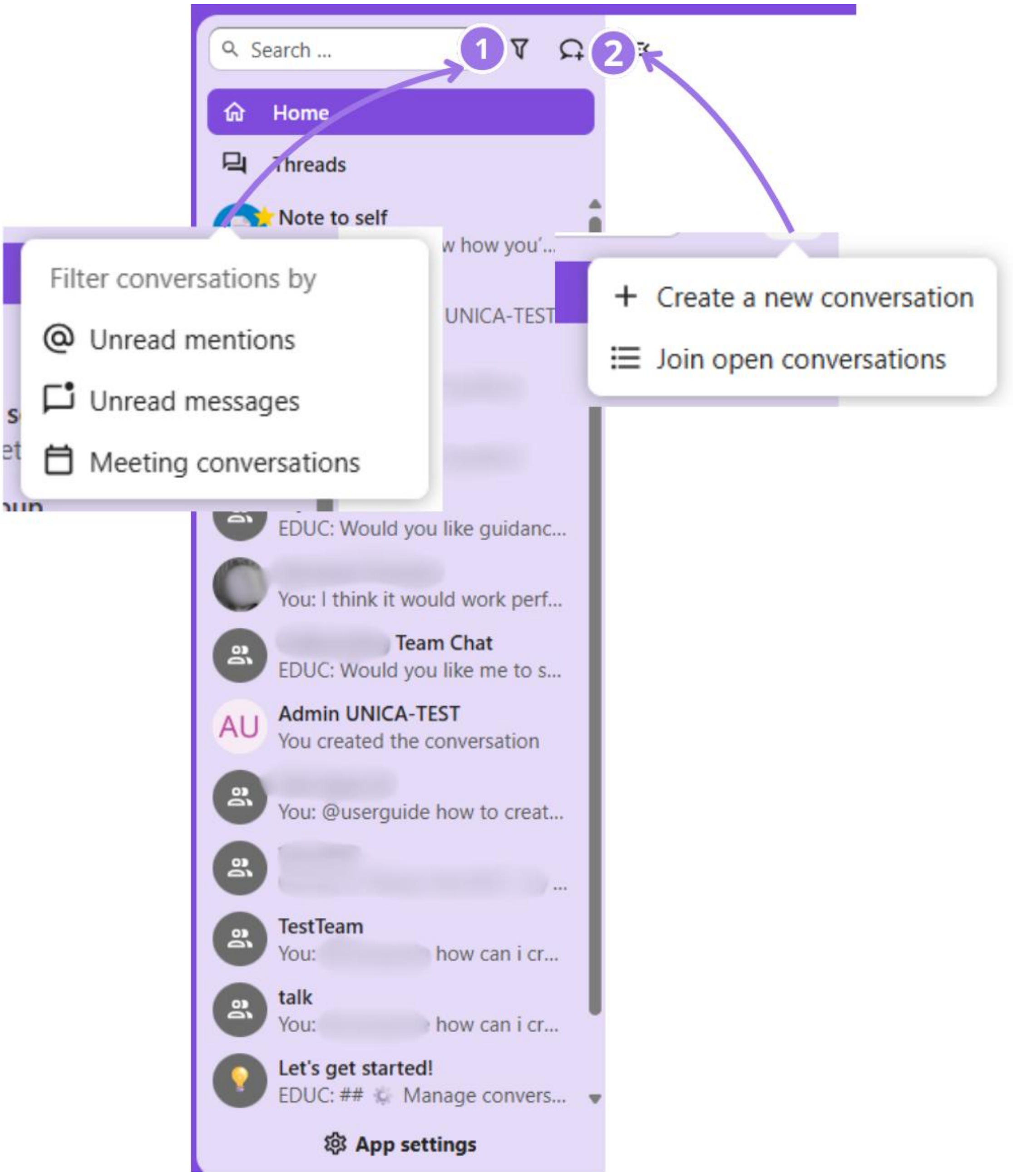
64 Talk home overview

The **<u>left sidebar</u>** allows you to navigate between conversations and quickly access key features. Even when you are not on the **Home** page, you can still access important options directly from the sidebar.



65 Talk left sidebar

Next to the search bar, you will find two useful icons:



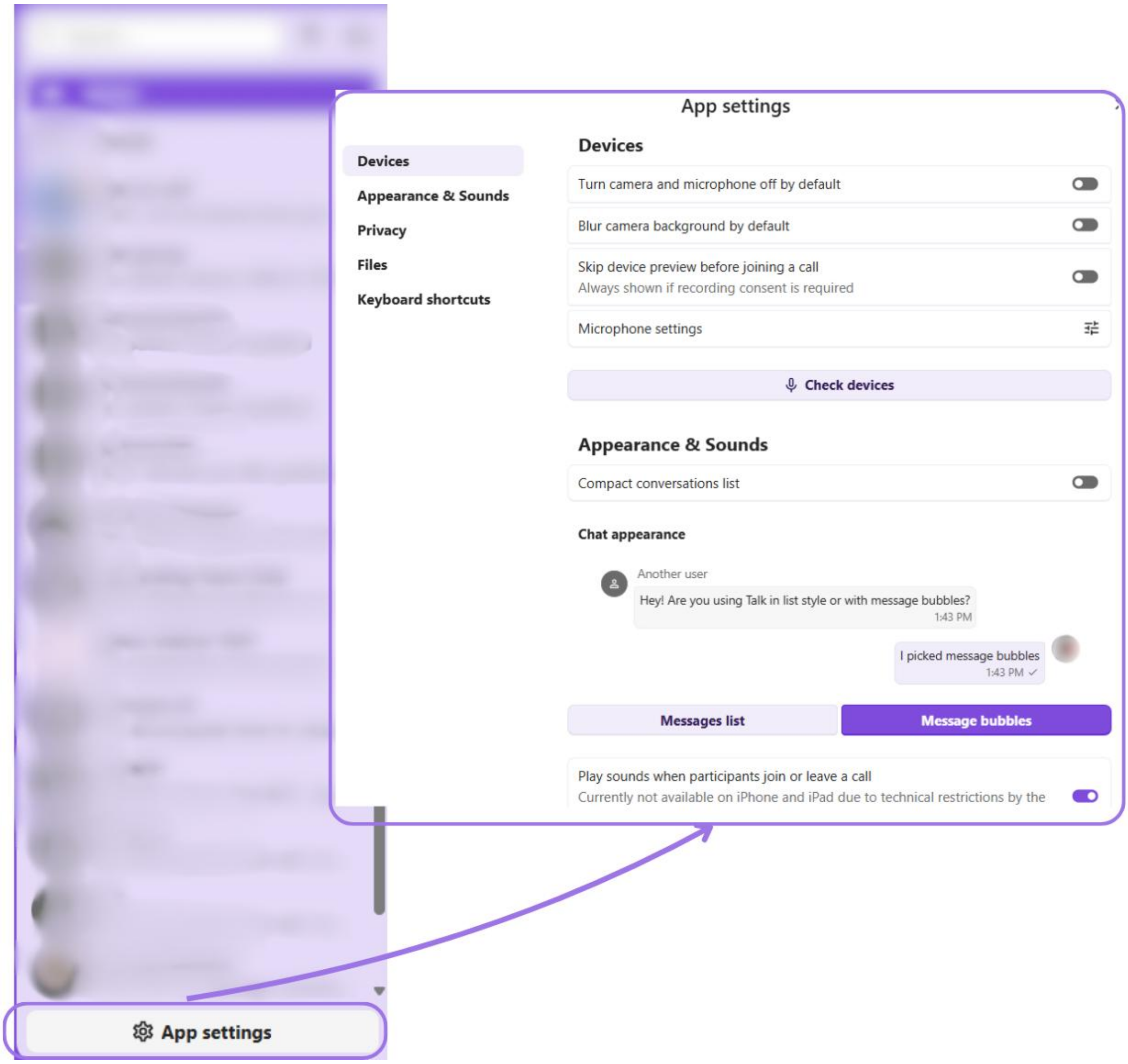
66 Filter conversation and new conversation

1. With the first one on the left, you can filter your conversations by:
    - Unread mentions
    - Unread messages
    - Meeting conversations
2. With the second one on the right (message bubble with a "+" icon) you can:
    - Create a new conversation
    - Join open conversations

In the left sidebar you will find all your **personal** and **group conversations**.

The chat *"Note to self"* is automatically created for you. Use it to write private notes, save ideas or reminders and store links or important information. Only you can see this conversation.

Talk settings



67 Talk app settings

At the bottom of the sidebar access **App settings** to customise Talk experience. The following sections are available:

1. **Devices**: manage your audio and video preferences:

    - **Turn camera and microphone off by default:** camera and mic will be disabled automatically when joining a call.
    - **Blur camera background by default**: background will be blurred automatically when your camera is on.

- **Skip device preview before joining a call**: bypass the preview screen before entering a meeting. (Note: The preview is always shown if recording consent is required.)
- **Microphone settings**: click to enable noise suppression, echo cancellation and autogain control.

2. **Appearance & Sounds**: customise how Talk looks and sounds:
    - **Compact conversation list:** reduces spacing between conversations in the sidebar, allowing to see more chats at once.
    - **Chat appearance:** chose from message bubbles or from messages list
    - **Play sounds when participants join or leave a call**: enables audio notifications during meetings (Currently not available on iPhone or iPad.).
    - **Notification sounds**: choose how to receive sounds for chat notifications and call notifications
3. **Privacy**: control visibility and interaction preferences:
    - **Send read receipts**: show other people that you've read a message. When disabled, others will not see when you have read their messages.
    - **Share typing status**: show other people that you're typing a message. When disabled, others will not see when you are typing.
4. **Files**: The **Files** section allows you to manage all attachments shared in Talk. Files are stored in the **/talk** folder.
5. **Keyboard Shortcuts**: talk offers several keyboard shortcuts to improve productivity. Key Shortcuts are combinations that allow you to perform actions quickly without using your mouse.
    - **General Shortcuts**
        - **Toggle full screen F**: switches between normal view and full-screen mode.
        - **Return to Home screen** ⎋: takes you back to the Home screen.
        - **Search: ⌘ F or Ctrl + F**: opens the search function
    - **Shortcuts in a Chat**
        - **Focus the chat input C**: moves your cursor directly to the message input box so you can start typing immediately.
        - **Unfocus the chat input (to use shortcuts)** ⎋: removes the cursor from the message box, allowing you to use other keyboard shortcuts.

- **Edit your last message: ⌘ ↑**: reopens your most recent message so you can modify or correct it.

- **Shortcuts in a Call**
  - **Turn camera on/off V**: quickly enable or disable your camera during a meeting.
  - **Turn microphone on/off M**: mute or unmute your microphone instantly.
  - **Raise or lower hand: R**: signal that you want to speak during a meeting without interrupting.
  - **Push to talk / push to mute Space**: temporarily activate or mute your microphone while holding the space bar.
  - **Zoom in / zoom out during screen sharing Mouse wheel**: while viewing a shared screen, you can zoom in or out using your mouse wheel for better visibility.

Starting a New Conversation

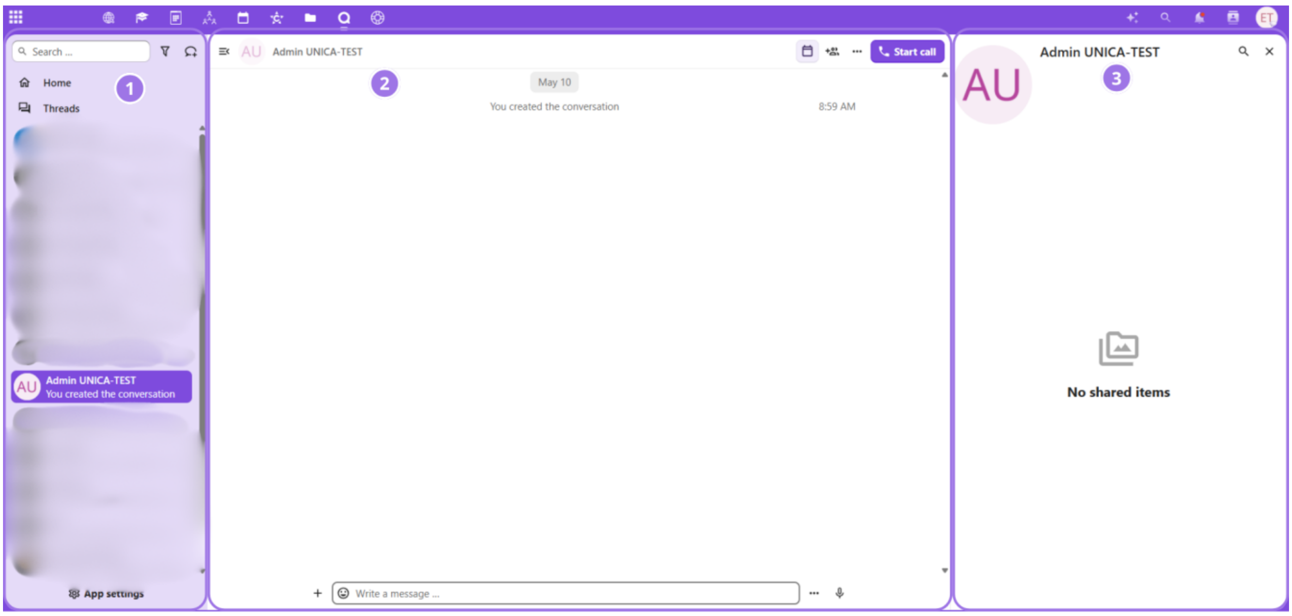
To **start a conversation with someone** you can:

1. Use the search bar at the top of the sidebar.
2. Type the person's name.
3. Click on their name from the results.

The chat will open automatically.

Chat Layout Overview

The interface of a conversation is divided into three main areas:



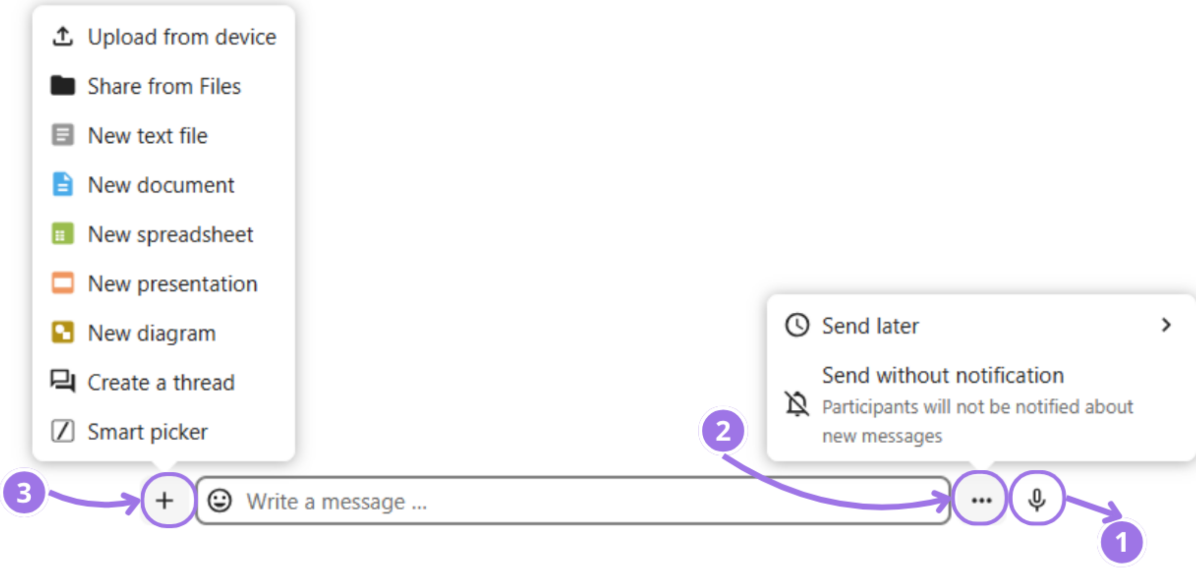
68 Conversation in talk

1. **Left Side – Main Menu**: the left sidebar always shows:

- **Home**

- **Threads**
- **Your conversations**
- **App settings**

2. **Center – Chat Area bottom**:



69 Options in talk conversation

1. **Send a voice message**: click the record button next to the message input field to record and send a voice message instead of typing.

2. **Send later or send without notification**

3. **Share Files and Create Content**: click the **"+" button** next to the message bar to access several options:

   - *Upload from device*: upload files directly from your device(computer or mobile devices).

   - *Share from Files*: Share documents already stored in File app.

   - *New text file*: Create and share a simple text file (markdown formatted) directly in the chat.

   - *New document*: Create a new document file (.odt by default).

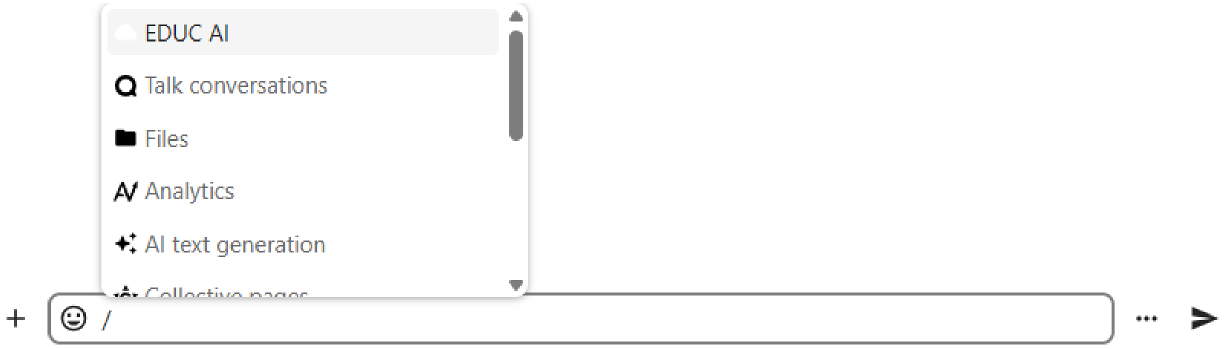
   - *New spreadsheet*: Create a spreadsheet directly within the platform (.ods by default).

– *New presentation*: create a presentation file to share with the participant (.odp by default)

– Create diagram: create digital graphic representations (.odg by default)

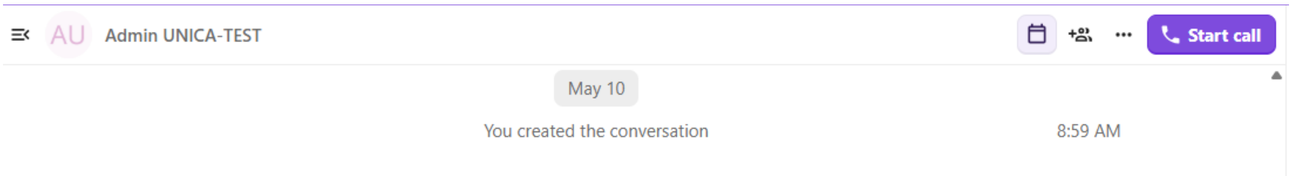
- *Create thread: this is the way to organise your conversation within a person or team by topics. Each new thread can be a new topic and each of the participants can customise the way to be notified per thread depending or it importance*

– *Smart picker*: suggests and gives you quick access to relevant content directly within the chat typing /



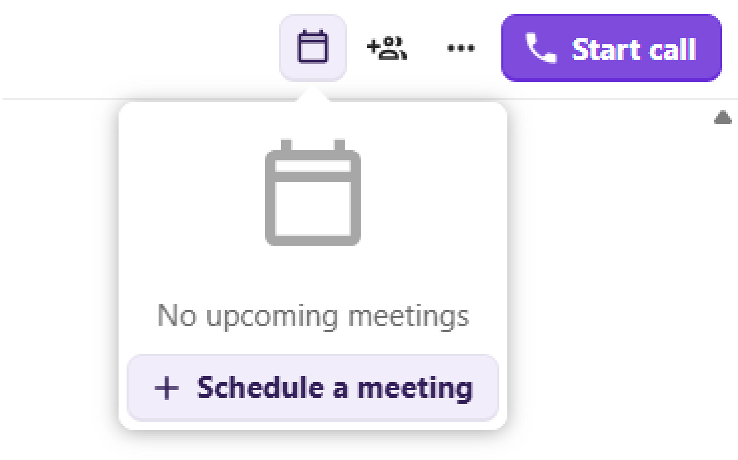
70 Smart picker in chat

3. **Center – Chat Area bottom**:



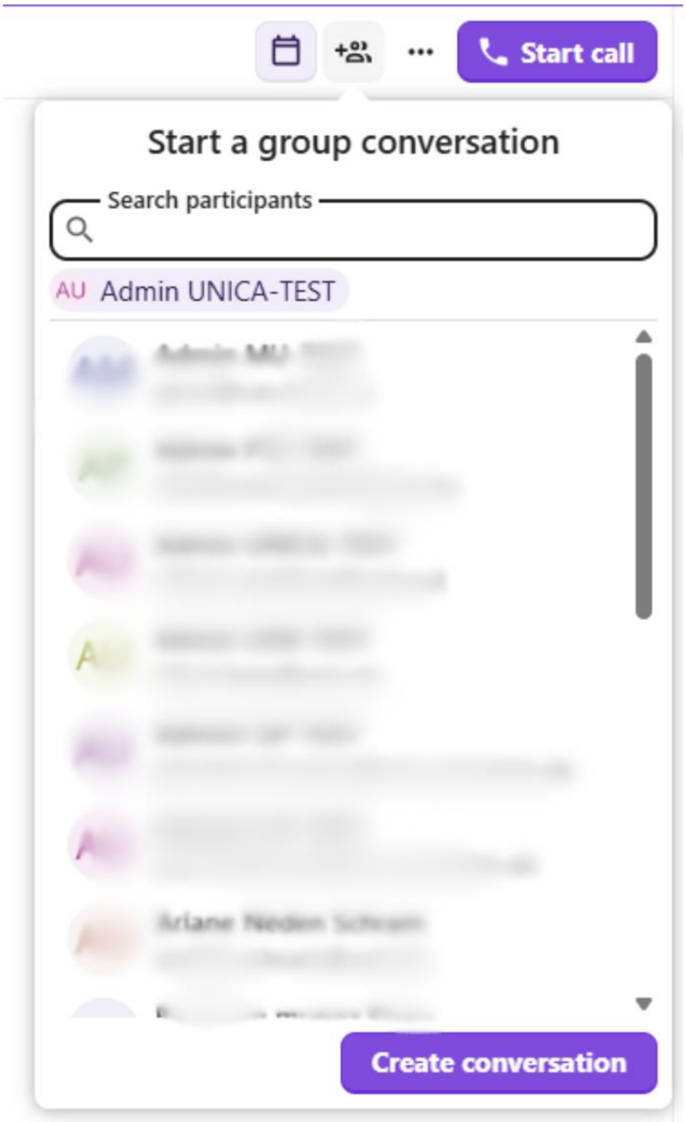
71 Options in chat

- **Schedule a Meeting from the Chat**: you can schedule a meeting directly within the conversation by clicking the calendar icon next to the person's name.



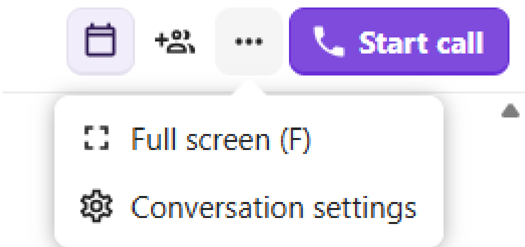
72 Schedule a meeting in a talk chat

- **Add More Participants**: add more participants in a new talk chat.



73 Add partecipants in a chat

- **Have access to more Options (Three Dots Menu)**: Click the three dots in the top-right corner of the chat to enter full-screen mode and manage conversation settings for that specific chat.



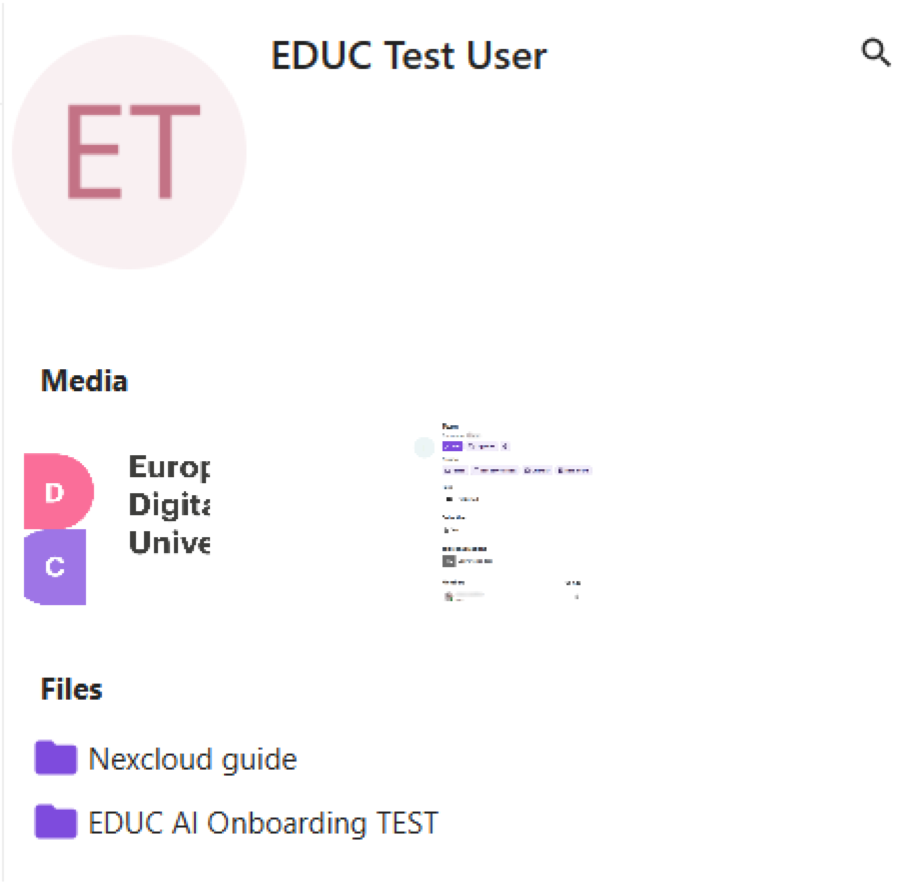
74 More options in chat

- **Start a Call**: click the purple call button in the top-right corner to begin a call.

4. **Right Side – Conversation Details** on the right panel, you will see:

   - The name of the person

- Any shared items (files, media, links)
- A **search icon** next to the name to search for specific messages inside the conversation.



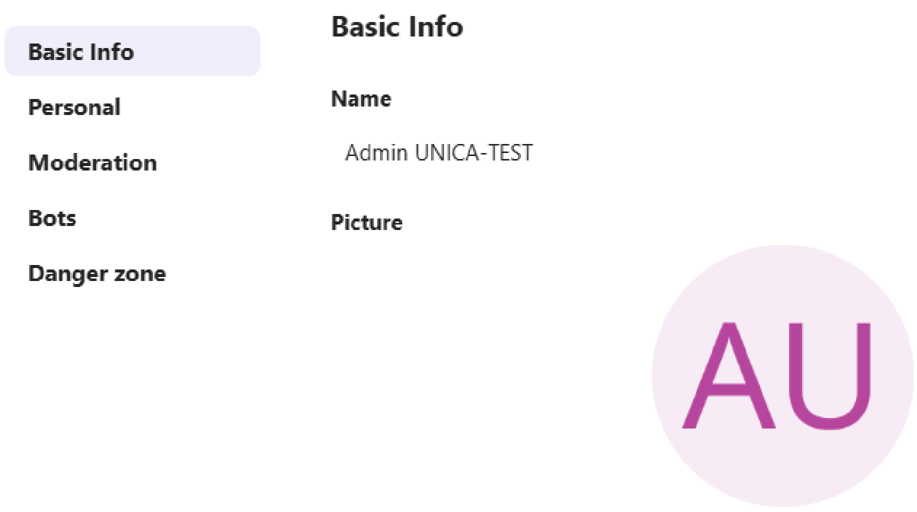
75 Right side conversation details

Conversation settings related to a specific chat

Manage settings and customise a specific chat.

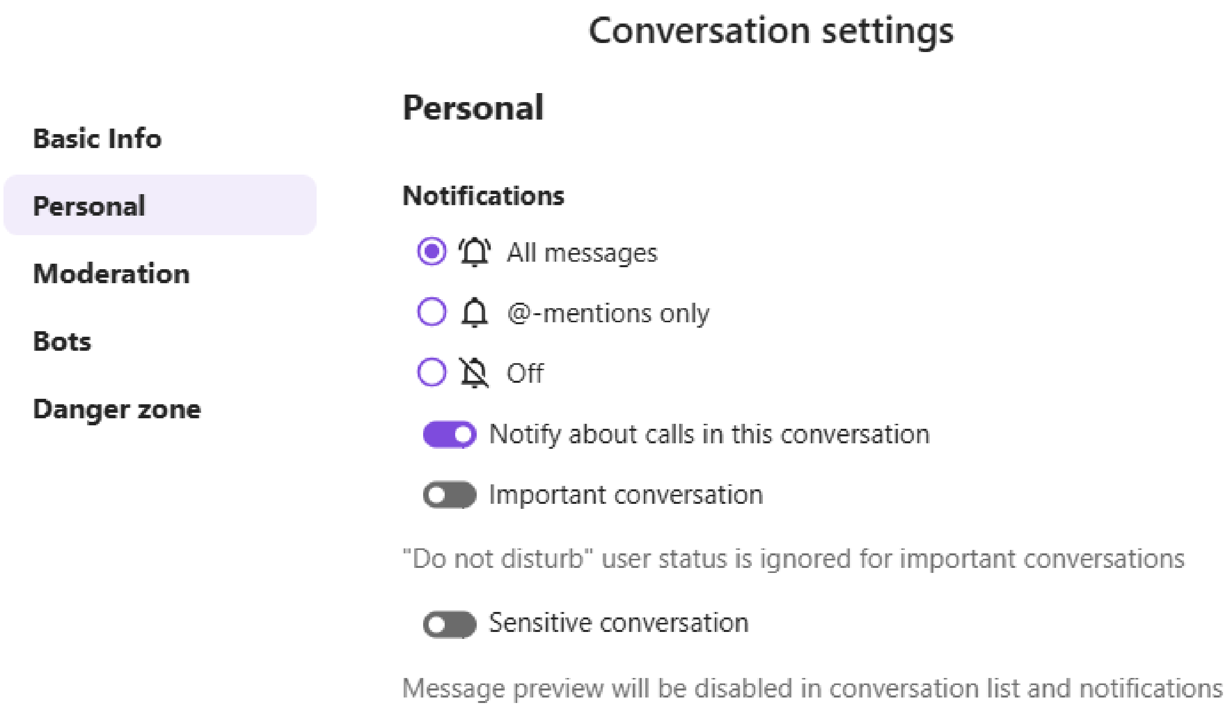
Access to a chat, click the three dots in the top-right corner of the conversation and select **Conversation settings:**

- **<u>Basic Info</u>**: This section displays general information about the person you are chatting with, including their name and profile picture.



76 Basic info in conversation settings

- **<u>Personal</u>**: this section allows you to personalise how you interact with this specific conversation.

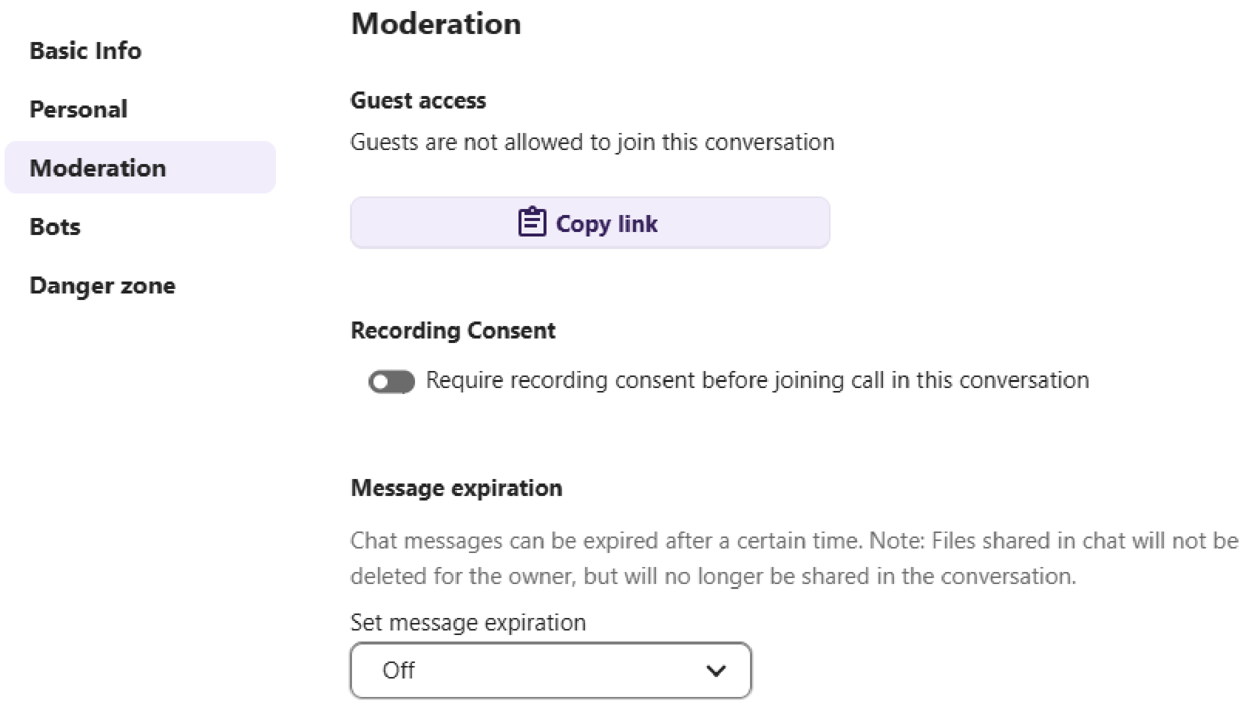


77 Personal info in conversation settings

Notification settings, you can choose how you would like to be notified:

- Receive notifications for all messages
- Receive notifications only when you are mentioned
- Mute the conversation entirely
- Enable or disable call notifications for this chat
    - You can also mark a conversation as **Important**. Notifications from important conversations override your **Do Not Disturb** status, ensuring you do not miss critical messages.

- You can classify a chat as **Sensitive**. When enabled, message previews are hidden in both the conversation list and notifications to help protect confidential or private information.



78 Moderation in conversation settings

- **Moderation**: This section allows you to manage access and advanced conversation rules.
    - Under **Guest access**, you can prevent guests from joining the conversation. Depending on permissions, you can also copy the conversation link.
    - You can enable **Recording consent**, which requires participants to give consent before a call is recorded. This option must be activated before the call starts.
    - You can set **Message expiration**, which allows chat messages to automatically disappear after a selected period of time. Available options include 1 hour, 8 hours, 1 day, 1 week, or 4 weeks. Once expired, messages are removed from the conversation.
      Files shared in the chat are not deleted from the owner's storage, but they are no longer accessible within the conversation.
- **Danger Zone**: this section contains actions that should be performed carefully, as some cannot be undone.
    - If you choose to **Archive conversation**, the chat will be hidden from your main conversation list.

- If you choose to **Leave conversation**, you will exit the chat. To rejoin a closed conversation, you will need to be invited again. Open conversations can be rejoined at any time.

Embedding content on the EDUC Portal apps in Talk

Within a **Talk** chat, you can type the "/" "slash" character to access and embed resources from EDUC Portal apps directly in the conversation.

This allows you to quickly share a File, **Collective, collective page**, a **Deck, deck's card**, a **task**, or enable and use one of the available EDUC AI Agents available under EDUC AI option.

79 Embedding content on the EDUC Portal apps in Talk

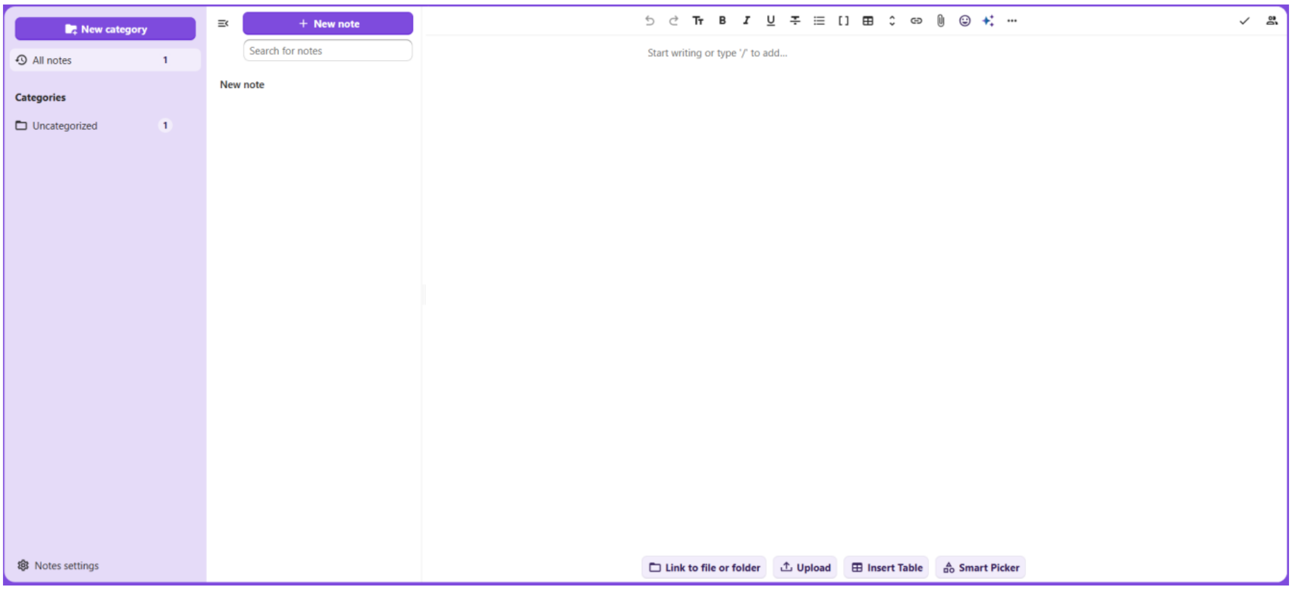
Tools

Collect information, organise work, manage notes, and collaborate more effectively.

Notes

Direct Access to notes https://portal.educalliance.eu/apps/notes/.

The **Notes** app is your digital notebook and supports rich text and Markdown. Students can use it to draft essays, take lecture notes, and track study schedules. Researchers can record literature review summaries, extract topics using AI tools, and link directly to research files. Faculty and staff can prepare meeting agendas and link them directly to university websites.


New category
All notes
1
Categories
Uncategorized
1
Notes settings
New note
Search for notes
New note
Start writing or type '/' to add...
Link to file or folder
Upload
Insert Table
Smart Picker

80 Notes

New note

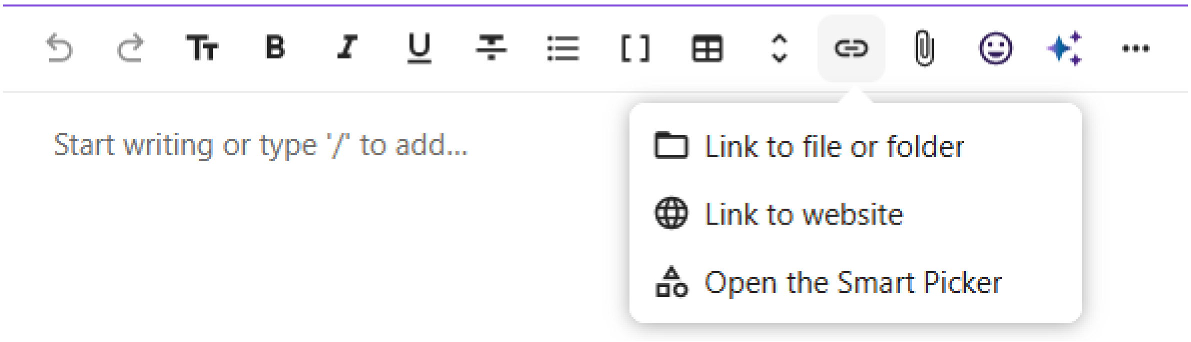
81 Add a new note

1. Click **+ New note** in the left sidebar to start writing.
2. Use the top toolbar to format your text (for example, bold text or create bulleted lists).

Create notes using rich-text formatting tools, including lists and text styling.

Linking Resources

Click the link icon on the top toolbar. A dropdown menu appears with options: "Link to file or folder," "Link to website," and "Open the Smart Picker."



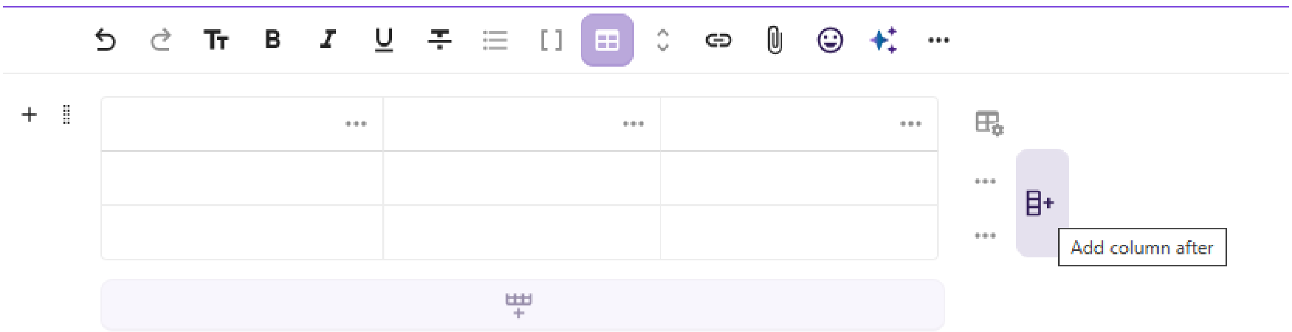
82 Add resources in notes

Step-by-step actions:

- Highlight the text to hyperlink.
- Click the **Link** icon in the formatting bar.
- Choose **Link to website** for external academic sources, or **Link to file or folder** to connect your note directly to a document stored in your EDUC Portal files.

Tables on notes

Use the table icon to insert tables and organize data. Notes are saved automatically while typing, ensuring that no work is lost.



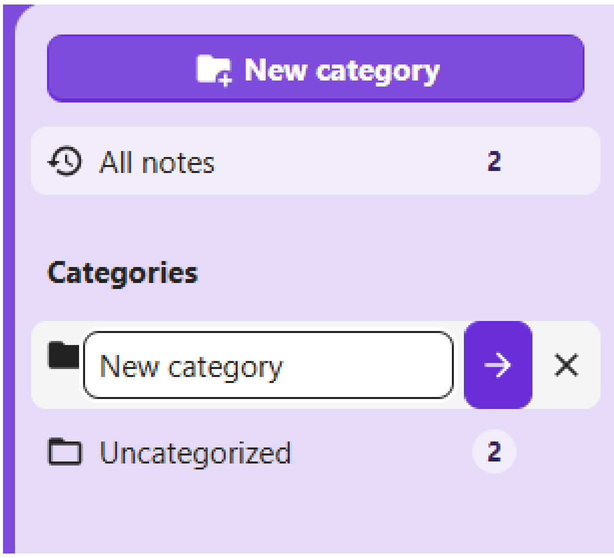
83 Add tables in notes

Step-by-step actions:

1. Click the **Table icon** in the top toolbar to insert a table for structuring data.
2. Use the **+** icons around the table to add rows or columns.
3. Work is saved automatically.

Organising Notes

Create categories to organise notes and assign each note to a category.



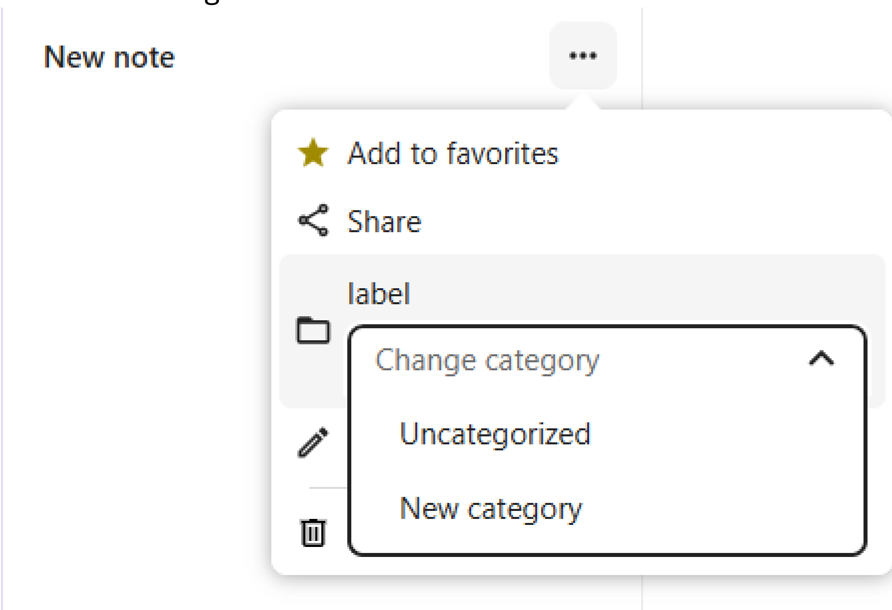
84 Add category in notes

Step-by-step actions:

- Click **New category**.
- Enter a name and press **Enter** or click the ➔ icon.

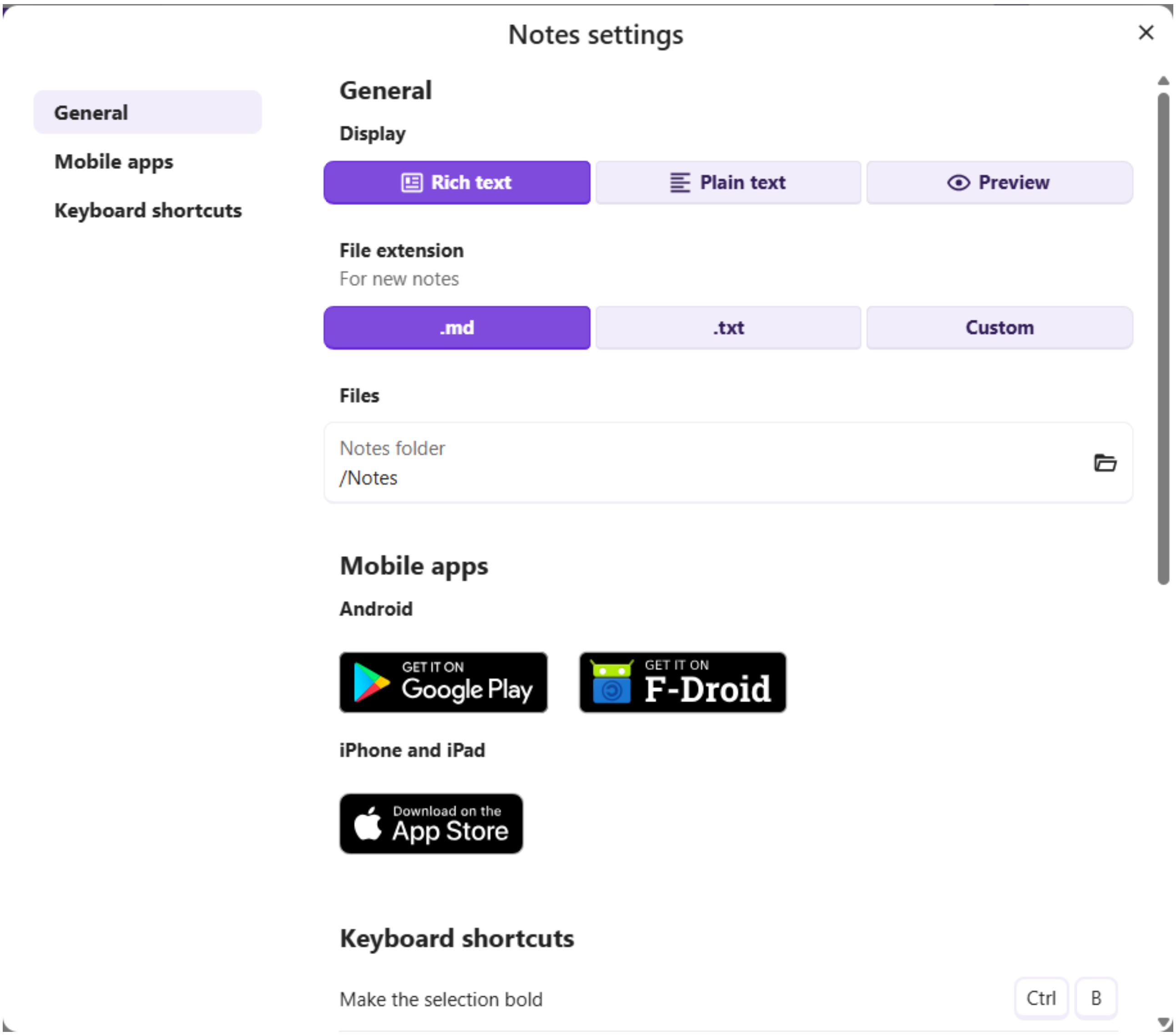
To add a note in a category:

- Click the **three dots** next to the note.
- Rename the note to give it a clear, identifiable title.
- Move the note into a specific category folder.
- Add to **favourites** to pin important notes or select **Share** to collaborate with classmates or colleagues.



85 Add a note to a category

Customising Notes Settings



86 Notes settings

Customise note-taking experience in **Notes settings**.

- Change the default text display.
- Access links to download the mobile app.
- View keyboard shortcuts to speed up workflow.

The **General** tab allows to change the **Display** settings (Rich text, Plain text, Preview) and the **File extension** (.md, .txt, Custom).

The **Mobile apps** tab provides download options for Android (Google Play, F-Droid) and iPhone/iPad (App Store).

The **Keyboard shortcuts** tab lists quick commands, such as **Ctrl + B** for bold and **Ctrl + I** for italic.

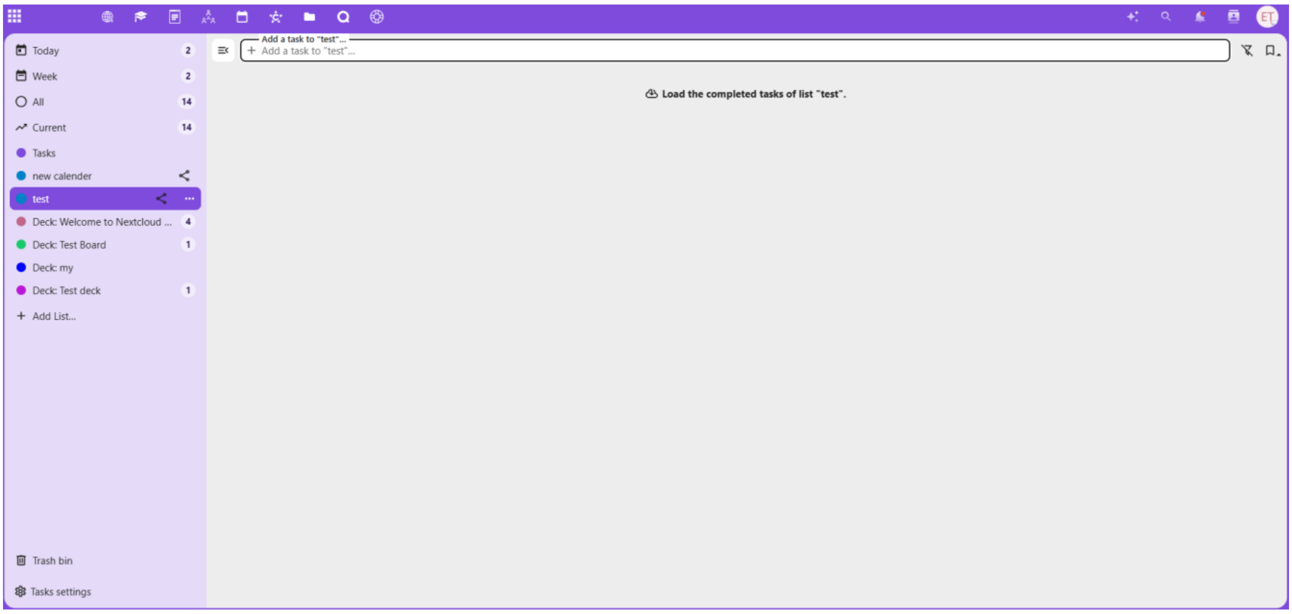
Tasks

Direct access https://portal.educalliance.eu/apps/tasks/.

The **Tasks** app helps manage deadlines and projects.

It is connected to both **Calendar** and **Deck**.

A task's association with a specific **Deck** defines it within a particular process or topic. At the same time, the ability to view tasks independently of decks provides a clearer overview of deadlines and workload.

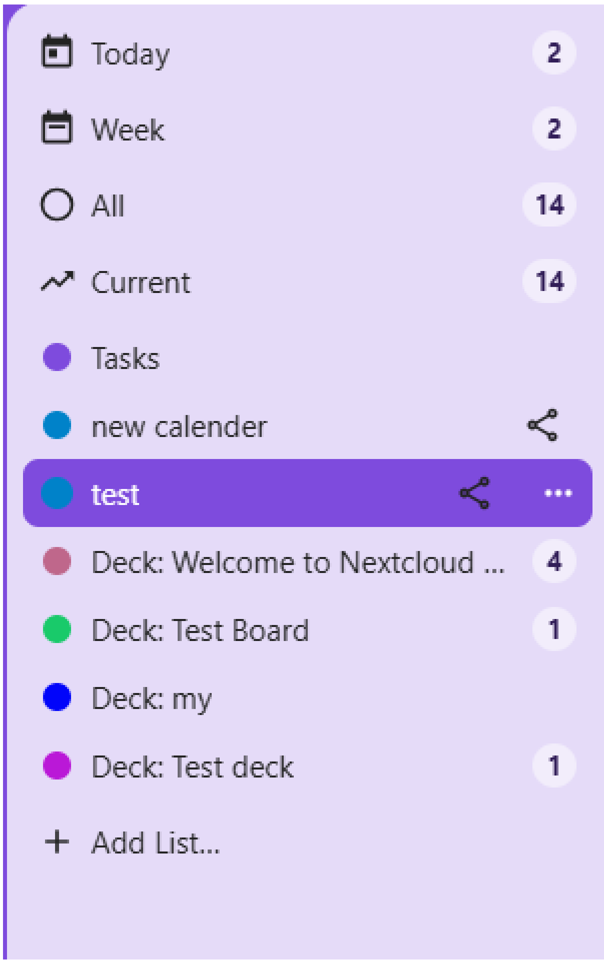


87 Task

Navigating Task Lists

In the left menu there is the task lists including synced **Deck** boards.

- Use filters such as **All**, **Current**, and **Completed** to organise tasks.
- View tasks grouped into lists such as **To Do**, **In Progress**, and **Done**.
- Select the checkbox next to a task to mark it as completed.



88 Task list

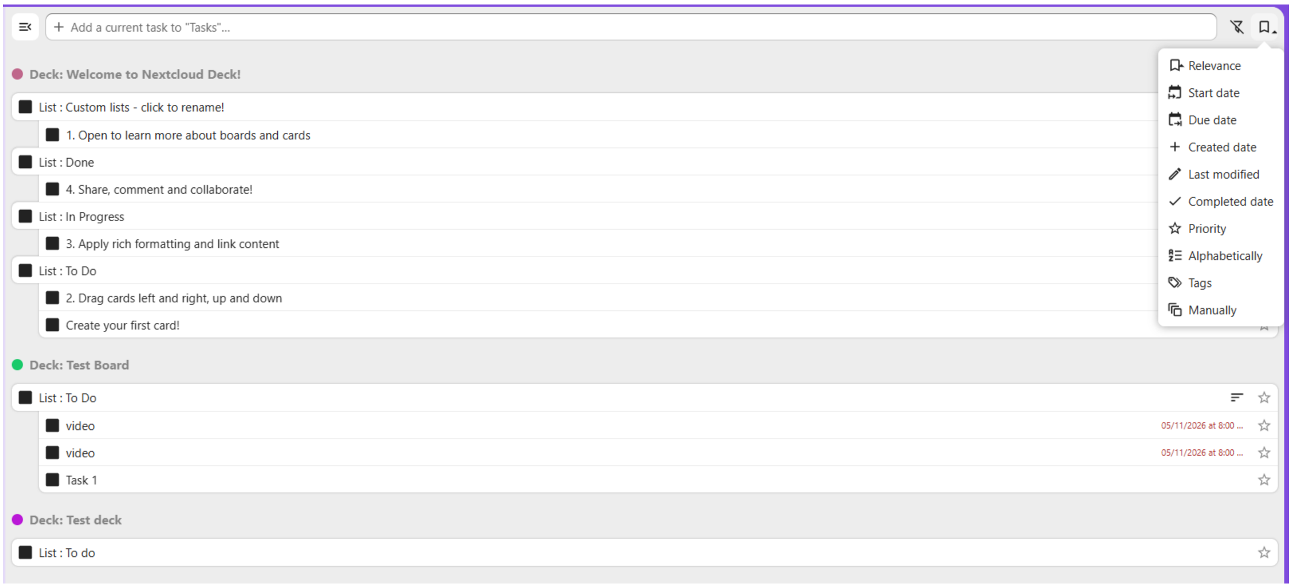
Sorting and Filtering Deadlines

Organise the task view by clicking the **Sort** icon in the top-right corner.

Sort tasks by **Due date** to track upcoming deadlines.

Filter tasks by:

- Relevance
- Start date
- Due date
- Created date
- Last modified
- Completed date
- Priority
- Alphabetically
- Tags
- Manually



89 Sorting tasks

Step-by-step actions:

1. Click the **Sort icon** in the top right corner.

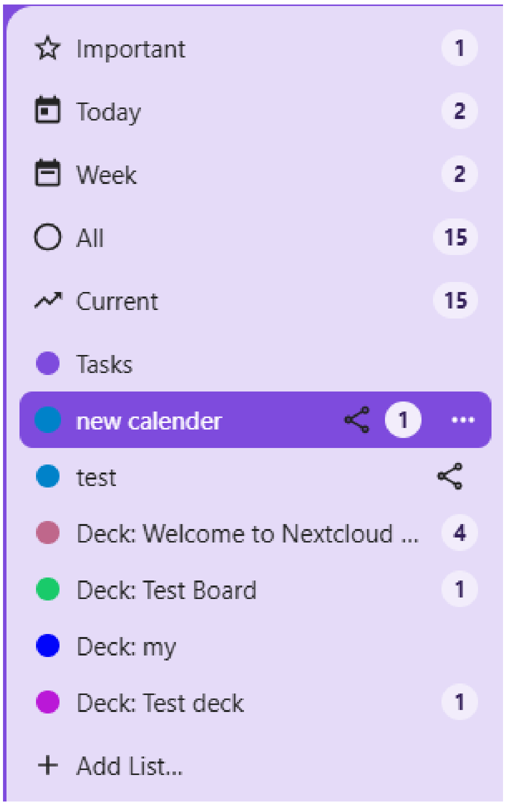
2. Select **Due date** to prioritize upcoming academic deadlines.

3. Alternatively, select **Priority** to view urgent tasks first, or **Alphabetically** to easily find a specific project.

Viewing List of task

Click on a specific list in the left menu to display only the tasks in that list.

Click the **star icon** next to a task to mark it as important.



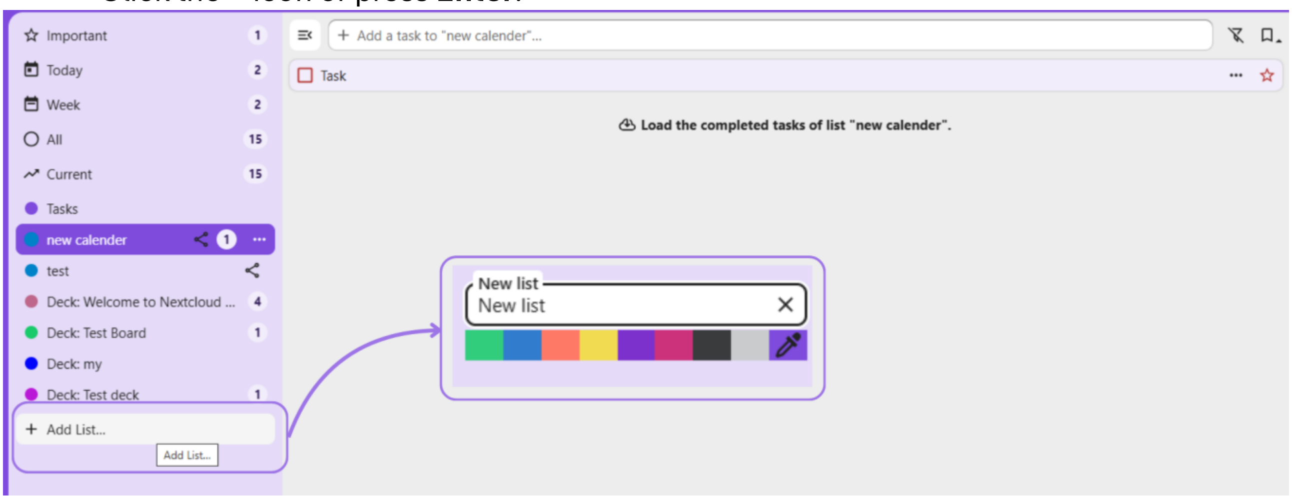
90 Viewing task list

Step-by-step actions:

1. Click on a specific project or **Deck** board in the left sidebar to view only the related tasks.
2. Review the items listed under **List: To Do** to see what remains for that specific project.
3. Click the **Star** icon next to a task on the far right to mark it as a high-priority item.

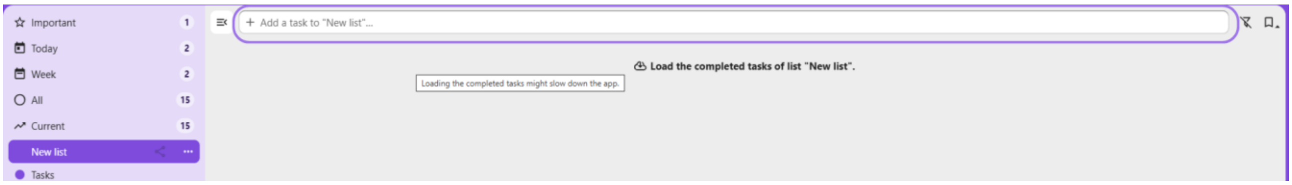
Creating a new task list

- Click the **+** icon at the bottom of the task list.
- Choose a name and a colour.
- Click the **→** icon or press **Enter**.



91 Add a list in task

Creating New Tasks



92 Create a new task

To add a new task:

1. Select the list of the task

2. Click into the top text bar that says **+ Add a current task...**

3. Type the name of task and press Enter.

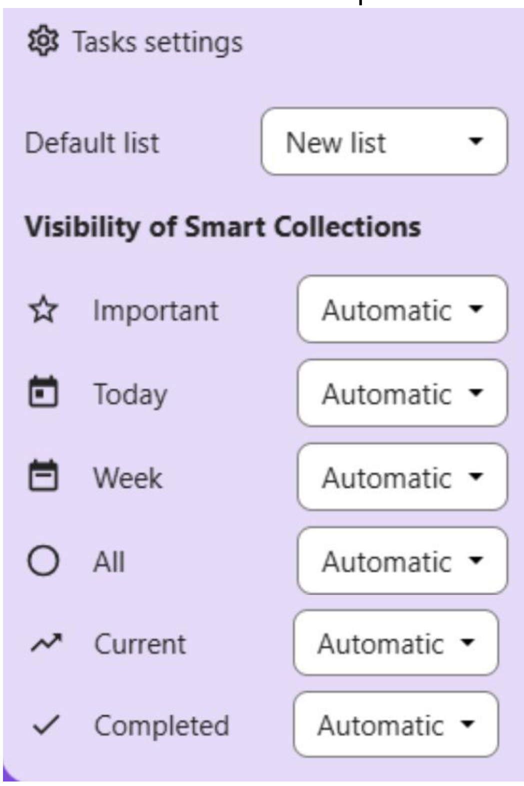
Warning: Task Location. The grey text in the top input bar (e.g., “Personal”) indicates the list where the new task will be saved.

Customising Task Settings and Smart Collections

Click **Tasks settings** in the bottom-left corner to customise the sidebar.

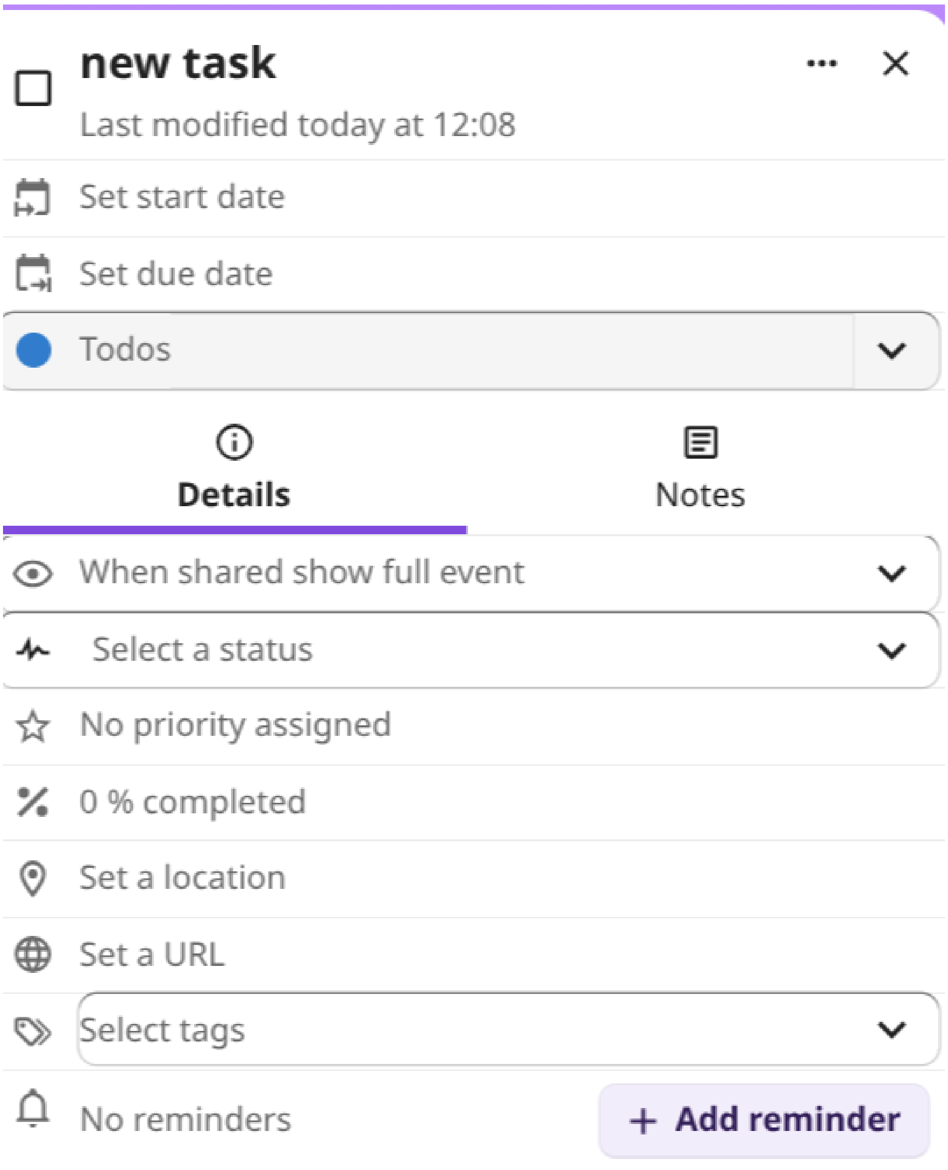
From there:

- Change the visibility of **Smart Collections**.
- Pin most important deadlines to the menu for quick access.



93 Task settings

Options in a task



94 Task details

Click a task to view its details on the right-hand side.

Basic Information

- ***Title*** *– The name or description of the task.*
- ***Last modified*** *– Displays the date of the most recent change.*
- ***Start date and time*** *– Defines when the task begins.*
- ***Due date and time*** *– Specifies the deadline for completing the task.*
- ***All day*** *– Marks the task as lasting the entire day, without specific times.*

Calendar/List Assignment

- ***Task list selection*** *– Assigns the task to a specific task list or calendar (shown as "Tasks" in the screenshot).*

Sharing Settings

- ***When shared show full event*** *– Controls how much information is visible when the task is shared with others.*

Progress and Organization

- ***Status*** *– Sets the current state of the task (e.g., needs action, in progress, completed, cancelled).*
- ***Priority*** *– Assigns a priority level to help organize work.*
- ***Completion percentage*** *– Tracks progress from 0% to 100%.*

Additional Information

- ***Location*** *– Specifies where the task should be carried out.*
- ***URL*** *– Links the task to a website, document, or external resource.*
- ***Tags*** *– Categorizes the task using custom labels for easier filtering and organization.*

Notifications

- ***Reminders*** *– Creates notifications that alert users before the task's start or due date.*

Notes

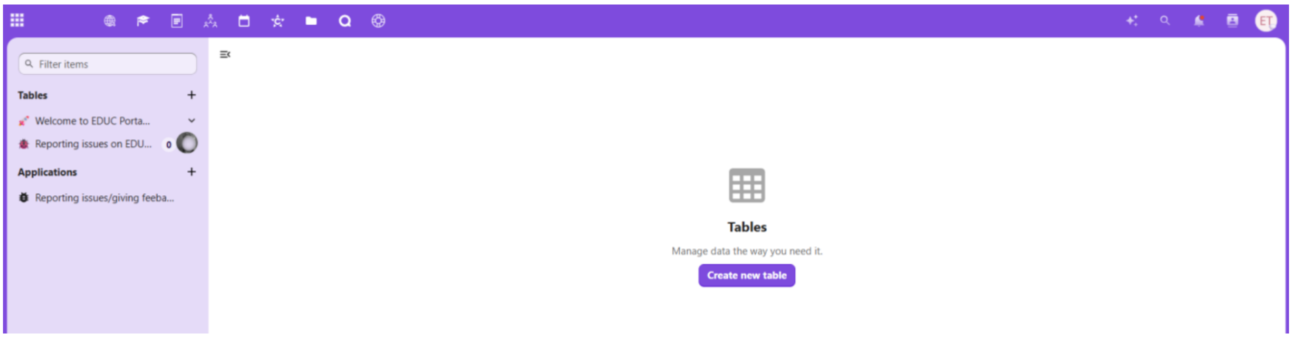
- ***Notes tab*** *– Provides space for detailed descriptions, instructions, comments, or other relevant information related to the task.*

Together, these options allow tasks to be scheduled, categorized, tracked, shared, and enriched with additional context, making them useful for both personal task management and team collaboration.

Tables

Direct access to tables https://portal.educalliance.eu/apps/tables/.

Tables App is used for collect data in a structured way EDUC portal.



95 Tables

It works like a lightweight database where you define columns, add rows, and then create views to control what people see.

Use tables when:

- You need consistent data entry
- You want filtering and sorting
- You need structured tracking over time
- A normal document would become messy

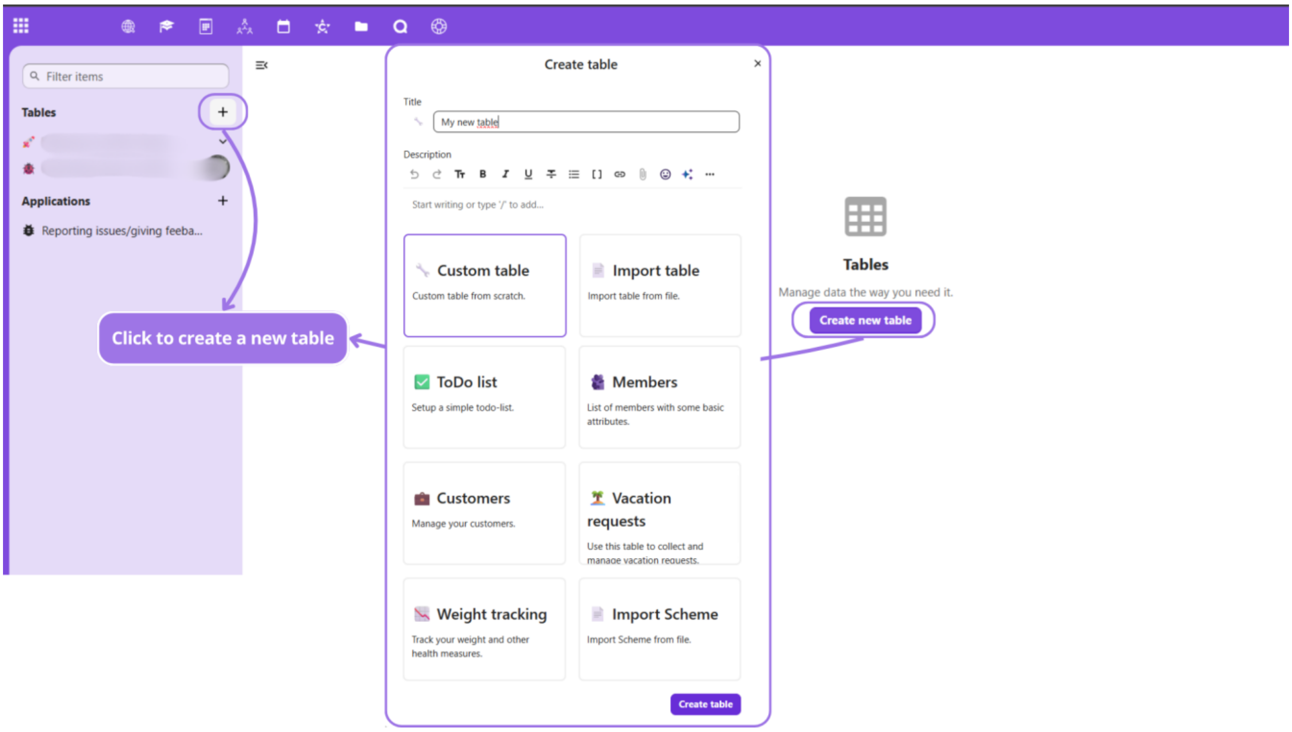
Typical examples:

- Equipment log
- Issue tracker
- Risk register
- Attendance list
- Status overview
- Submission tracker

Unlike Collectives (free-form documentation), Tables is built for **structured data**.

How to create a new table

- Click on the + icon or select "create a new table"
- Fill the information and confirm



96 Creating a new table

Columns

Columns define what kind of data can be entered.
Choosing the right column types keeps the table clean and usable.

Choose structured column types to keep data consistent and easy to filter.

Common column types:

- Text
- Rich text
- Number
- Date / Date-time
- Yes/No (checkbox)
- Single select (one option)
- Multi select (multiple options)
- Progress
- Rating
- Link

Steps:

1. Open the table.

2. Add or edit columns.
3. Choose the correct type for each column.
4. Rename columns to your liking.

Best practice: Avoid excessive free text. Use select fields and checkboxes where possible to standardise input.

Rows

Each row represents one record. Keep entries structured and update status fields as work progresses.
Examples:

- One piece of equipment
- One issue
- One student entry
- One task-like record

Steps:

1. Click **Create row**.
2. Fill in the defined columns.
3. Update fields as status changes.

Keep titles short. Use structured fields for tracking instead of long descriptions.

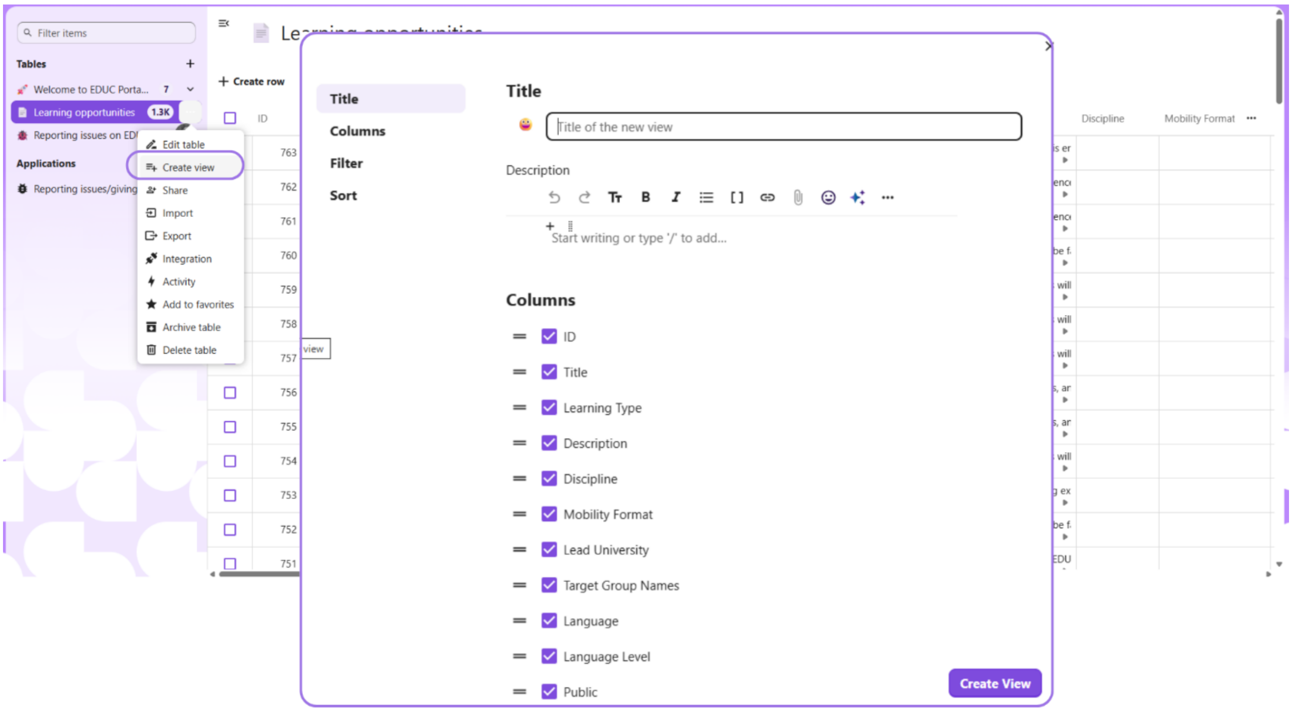
Views

Views allow you to display only selected columns and structure how data is presented.

This is one of the most powerful features in **Tables**.

You can create:

- An **Input view** (only necessary columns visible)
- An **Overview view** (status + responsible)
- An **Admin view** (includes metadata)
- A **Filtered view** (e.g., only open items)



97 Creating a view in tables

Steps:

1. Open the table.
2. Create a new **View**.
3. Select which columns should be visible.
4. Save the view.

Views allow you to simplify the interface for different roles without duplicating the table.

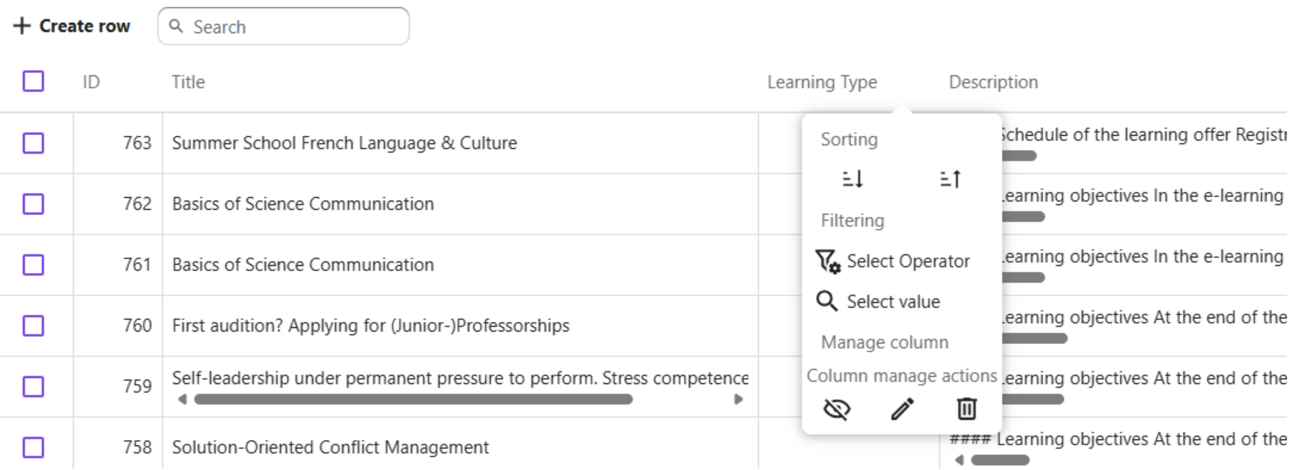
Filtering, sorting and search

As tables grow, filtering and sorting become important.

Search, filter, and sort to keep your table usable as it grows.

You can:

- Search within the table
- Sort by column (e.g., date or status)
- Filter by value (e.g., show only 'Open')



98 Sorting and filtering in tables

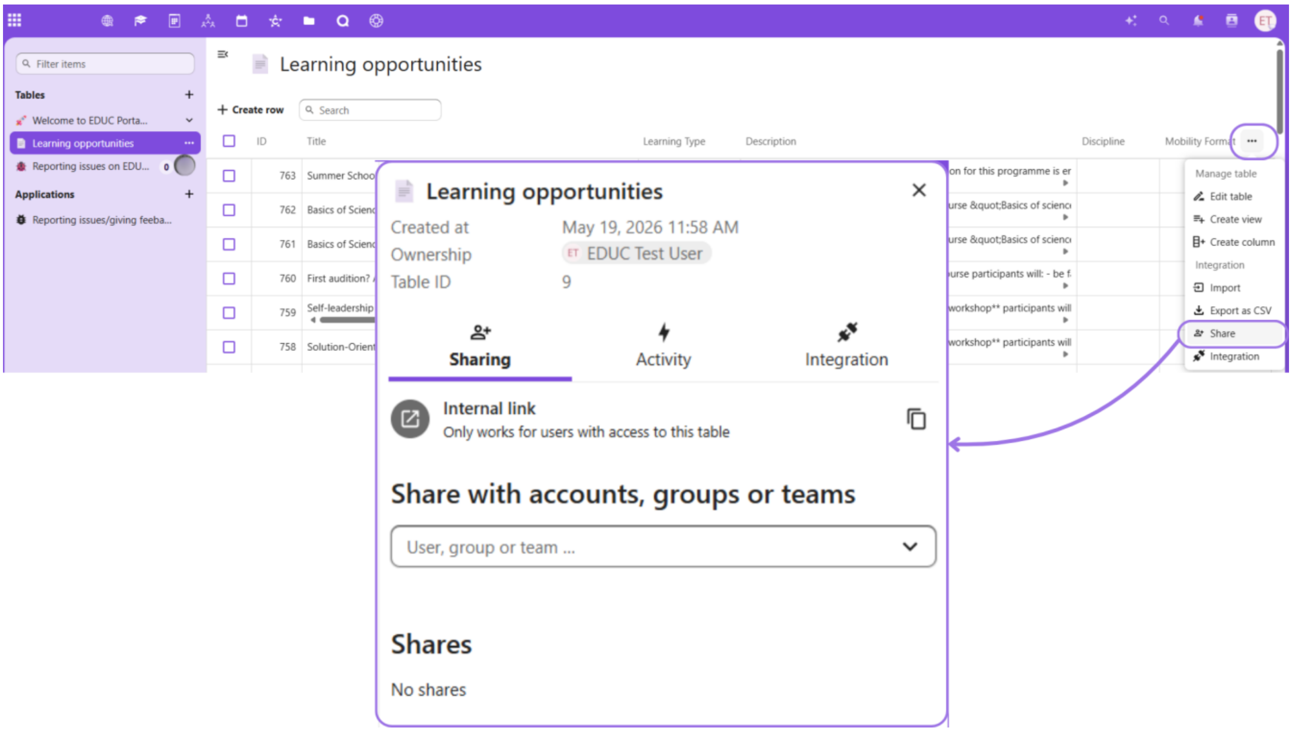
Steps:

1. Use the search field to quickly find records.
2. Sort columns to organise data by priority or deadline.
3. Use filters in views to focus on relevant data.

Sharing Tables

Tables can be shared with individuals and groups.

Share tables intentionally and set permissions based on responsibility.



99 Sharing tables

Steps:

1. Open the table.

2. Click **Share**.
3. Add the relevant users.
4. Set appropriate permissions (view/edit).

Applications

Applications allow you to build a simplified interface on top of a table.

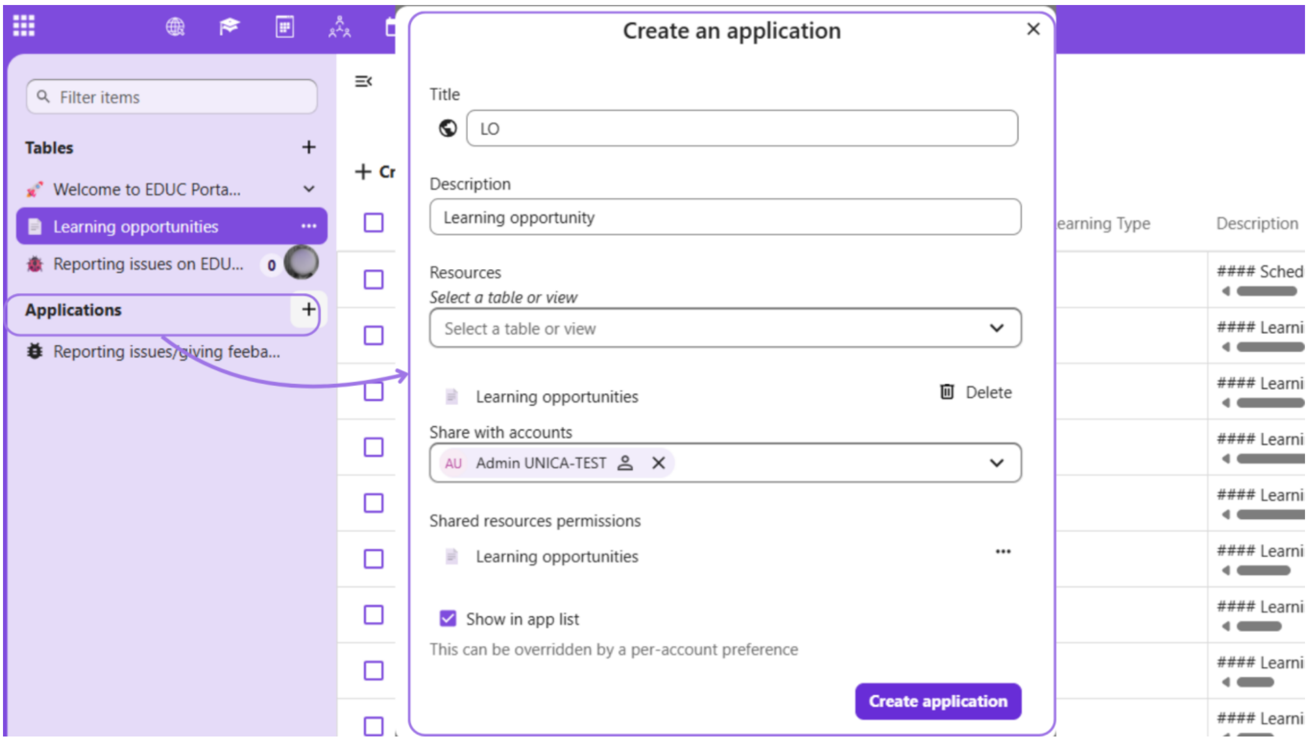
Use Applications when you want a simplified interface built on top of structured data.

Instead of showing the full table, you can:

- Select specific views
- Control what columns are visible
- Provide a cleaner submission interface

This is useful when:

- Multiple users need to submit data
- You want a simplified form-like experience
- You want controlled access



100 Creating applications in tables

Steps:

1. Open **Applications** inside Tables.
2. Create a new Application.
3. Select which table(s) and view(s) to include.
4. Share the Application with relevant people.

Metadata and tracking

Tables automatically track structured changes depending on configuration (e.g., who updated a row and when).

Tables support structured tracking, making them suitable for logs and status overviews.

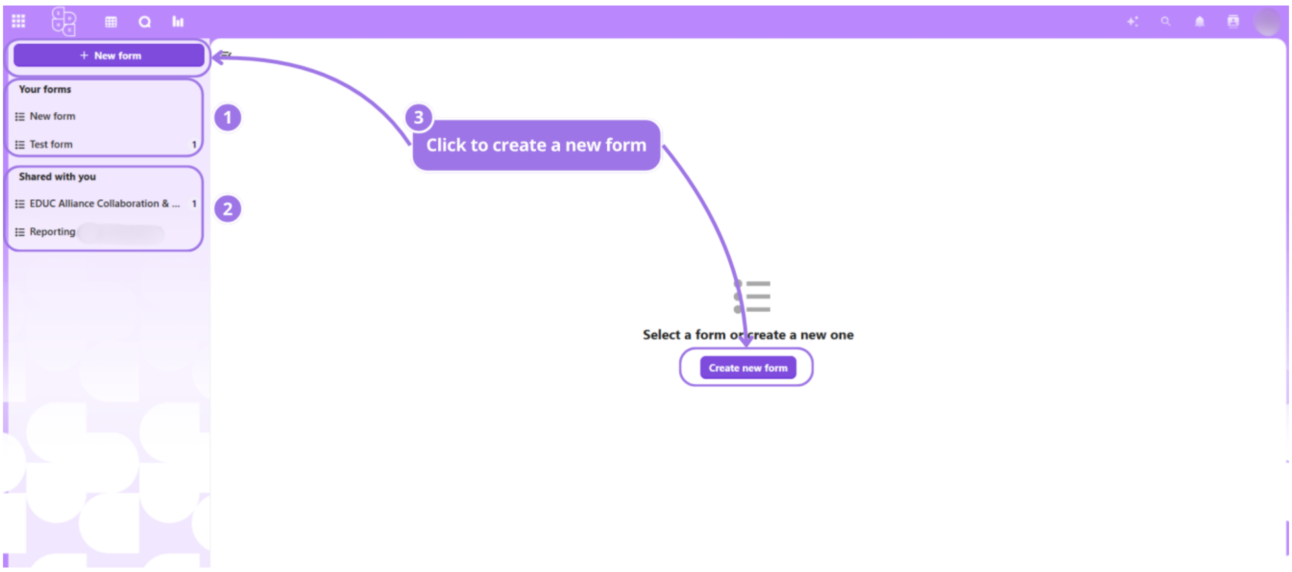
This makes it suitable for:

- Logs
- Audit-like tracking
- Responsibility overview

Forms

Direct access to forms https://portal.educalliance.eu/apps/forms/.

Form App is used for collecting data based on certain types of questons and fields.



101 Creating a new form

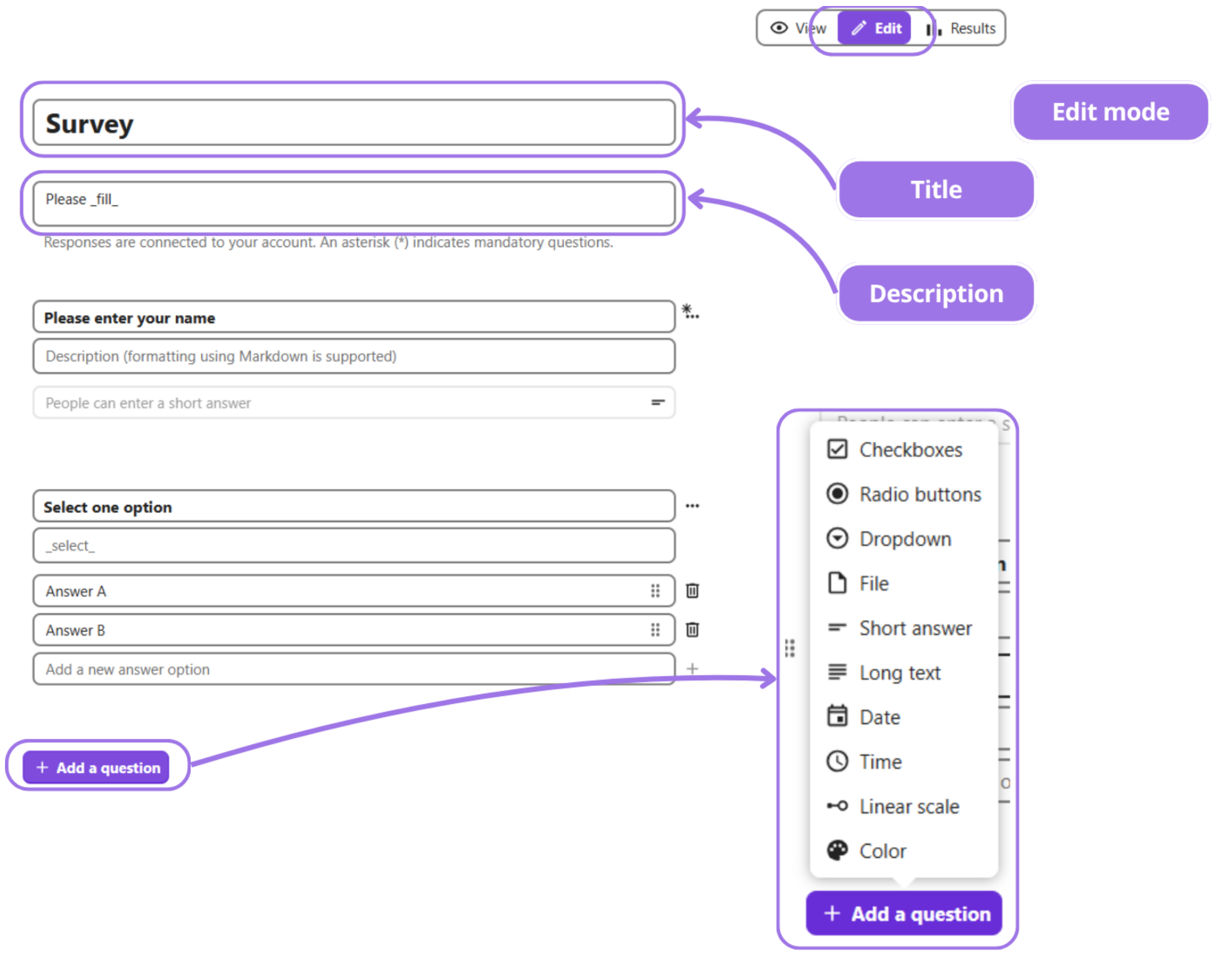
1. The left sidebar shows **Your forms**.

2. The **Shared with you** section shows forms shared with you.

3. To create a new form click **+ New form** or use the **Create new form** button in the center of the screen.

Creating and Editing a Form

To edit an existing form click on it. To create a new form, click on the + icon or on “create a new form”.



102 Editing a form

In the edit section:

- The **Form title** box contains the name of the survey.
- The **Description** box provides instructions for participants. **Note:** Markdown formatting is supported here.
- The purple **+ Add a question** button allows you to add questions.

Supported question types:

- Checkboxes
- Radio buttons
- Dropdown
- File upload
- Short answer
- Long answer
- Date
- Time
- Linear scale

- Colour

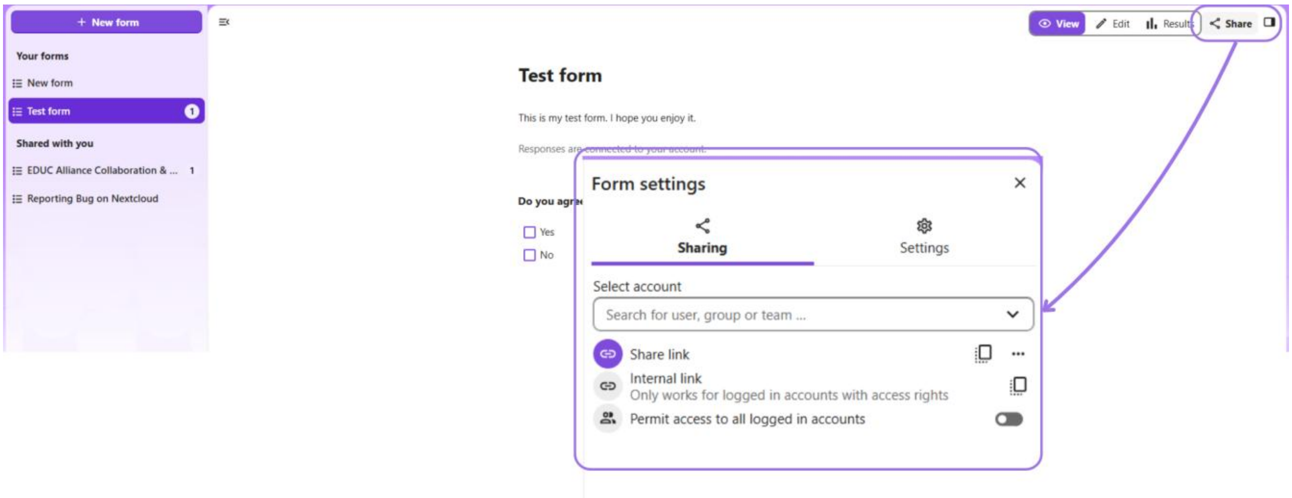
Tip: Markdown Formatting: Use Markdown in the description field to add bold text, italics, or lists and make instructions clearer for respondents.

In the EDUC Portal the branch option is not yet available.

Sharing Form

To collect responses share a form.

Use the search bar to invite specific colleagues, or create a share link to send your survey out to a wider audience.



103 Sharing a form

Step-by-step actions:

1. Click the **Share** button in the top right menu to open this panel.

2. To share with specific members, type their name in the **Select account** search bar.

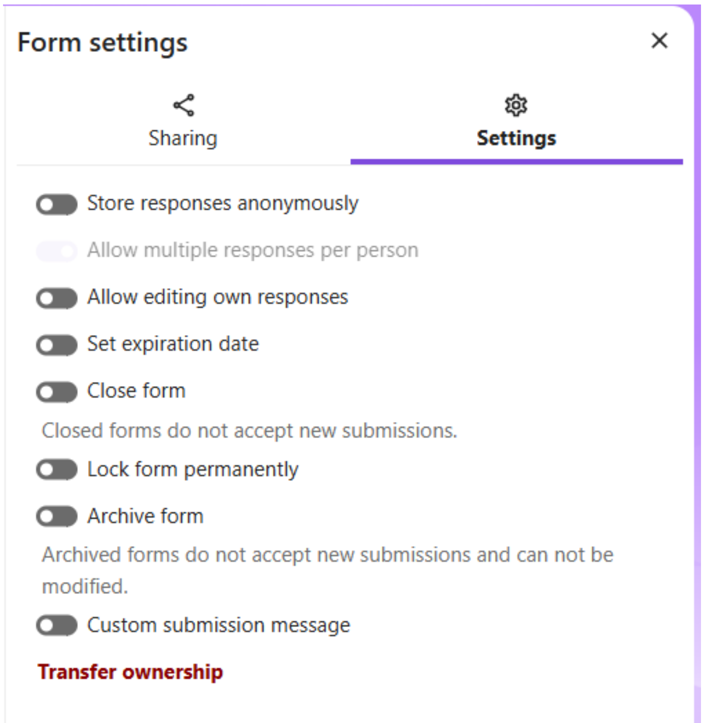
3. To distribute widely, click the **+** next to **Share link** to generate a URL or a QR Code.

4. To restrict access solely to Educ Portal members, use the **Internal link** or toggle on **Permit access to all logged in accounts**.

Form Settings

In the Settings tab, you can manage how the form works. You can:

- Make responses anonymous.
- Allow multiple submissions or edits.
- Set expiration dates.
- Close or lock the form.
- Archive the form.
- Customise the submission message.



104 Form settings

Step-by-step actions:

1. Click the **Settings** tab in the right-hand panel.

2. Toggle **Store responses anonymously** if your research requires blind data collection.

3. Toggle **Set expiration date** to automatically close the form after a specific deadline (ideal for assignments).

4. Use the **Archive form** or **Close form** toggles when your data collection phase is complete.

Best Practice for Privacy: Always verify if your research requires anonymous responses before distributing the form. Once responses are collected non-anonymously, the setting cannot retroactively hide identities.

Choosing Between Forms and Tables

Forms and Tables serve different purposes in EDUC Portal.

Use **Forms** when you need to collect information through surveys, questionnaires, registrations, or feedback forms. Forms are designed for easy data submission and can be shared with a wide audience.

Use **Tables** when you need to organize, manage, and collaborate on structured data, similar to a spreadsheet or a small database. Tables are better suited for tracking records, managing inventories, maintaining lists, or handling data that requires ongoing updates and collaboration.

In addition, Tables enable you to create custom applications that can be made visible to specific users or groups according to the scope you define. They also provide more advanced field validation options than those currently available in Forms. Furthermore, Tables can serve as data repositories whose content can be displayed and reused in other areas of the platform.

In short: choose Forms to gather data, and Tables to store, manage, validate, and present it.

If you want to...	Use Forms	Use Tables
Collect survey responses	✓	
Create registration or feedback forms	✓	
Share a questionnaire with many users	✓	
Manage a list of items, contacts, or assets		✓
Track projects, tasks, or requests		✓
Collaborate on structured data with a team		✓
Continuously update and organize records		✓
Create custom data-driven applications		✓
Apply advanced field validation rules		✓
Use data as a repository for display and reuse		✓
Gather data first, then process and manage it	✓ (collection)	✓ (management)

Quick guide:

- Forms = Data collection
- Tables = Data management, validation, and data-driven applications

EDUC Portal Apps

EDUC AI

Direct acces https://portal.educalliance.eu/index.php/settings/user/educai

EDUC AI allows users to create and use custom chatbots inside the portal. Each bot is configured with a specific purpose and content and can be used in talk conversations.

A bot can be used for:

- Answering questions
- Assisting with writing
- Supporting documentation

- Providing help based on specific content (e.g. course material)

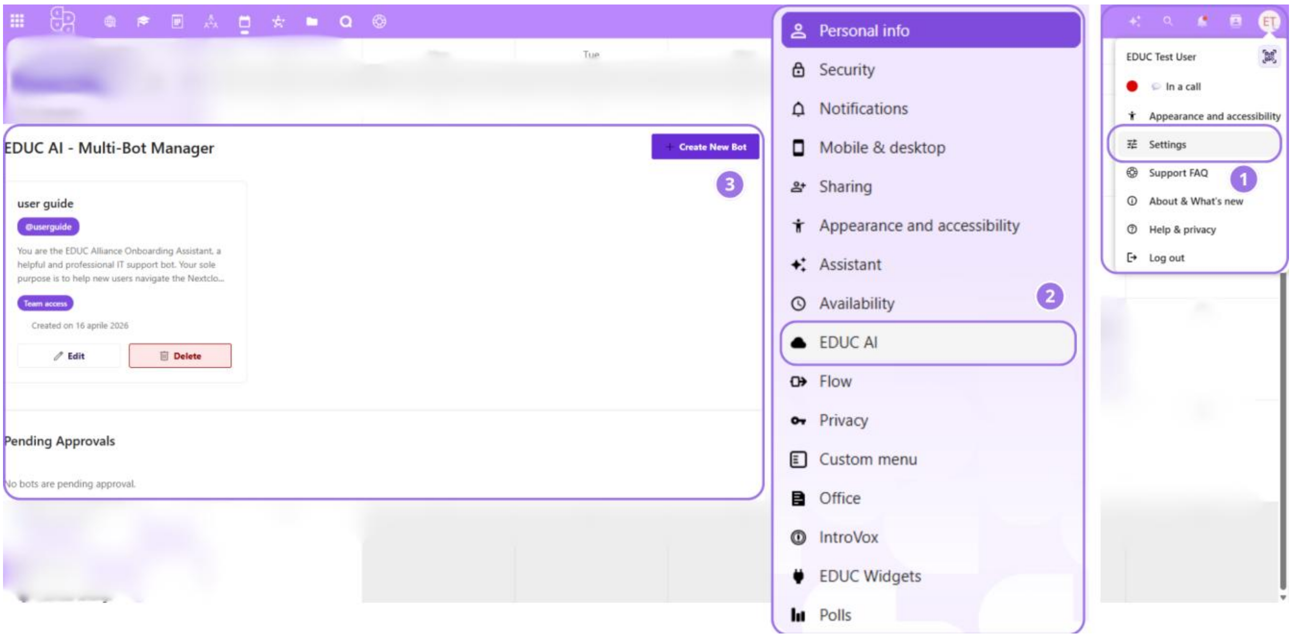
To use a bot in a chat, you need to:

1. **Enable it in the conversation**, and
2. **Call it once to activate it**

After that, you can continue asking questions normally.

Accessing EDUC AI (manage your bots)

All bots are managed through your personal settings.



105 EDUC AI

Steps:

- Click personal settings (top right).
- Open **Settings**.
- In the left menu, select **EDUC AI**.
- View your existing bots or create a new one.

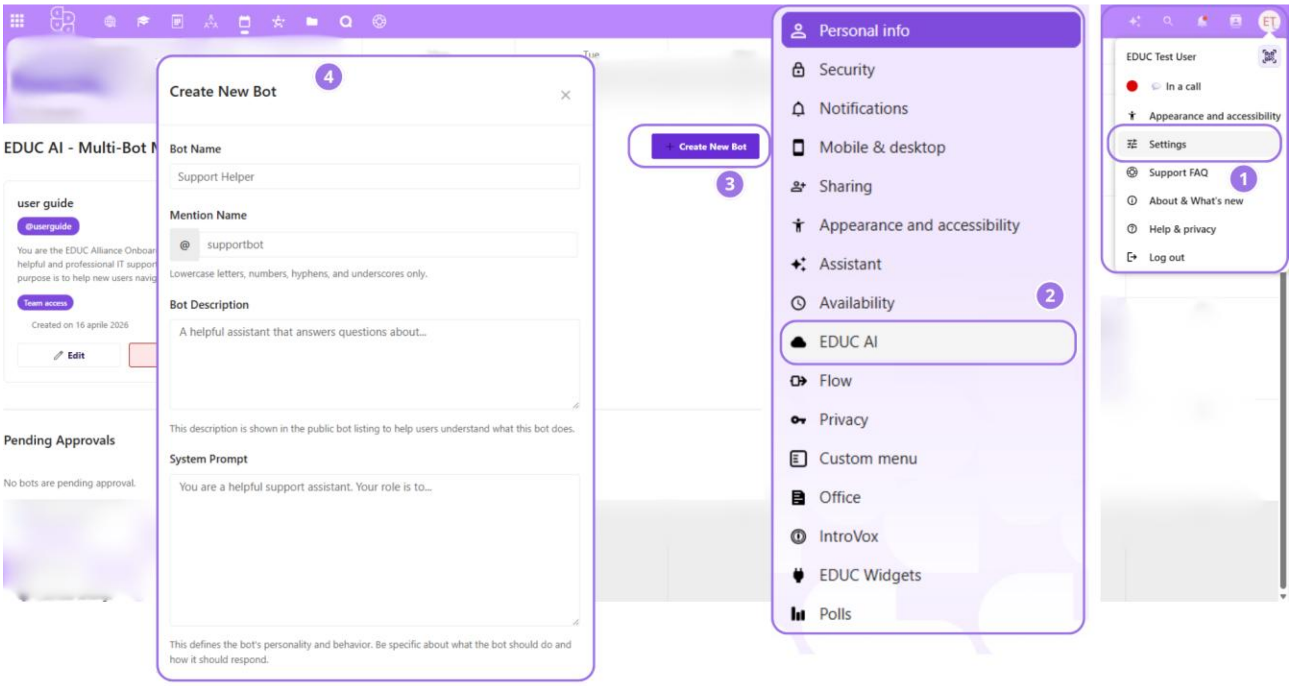
Creating a chatbot

Create your own bot with a specific purpose and content.

Steps:

1. Open Settings
2. Select EDUC AI.
3. Click Create/edit new bot. (if you want to edit an exixting one this button will bring you to your personal setting were your will be able to edit the bot you are owner of.

4. Configure the bot (name, instructions, content, or purpose).



106 Creating a new bot

Quick note:

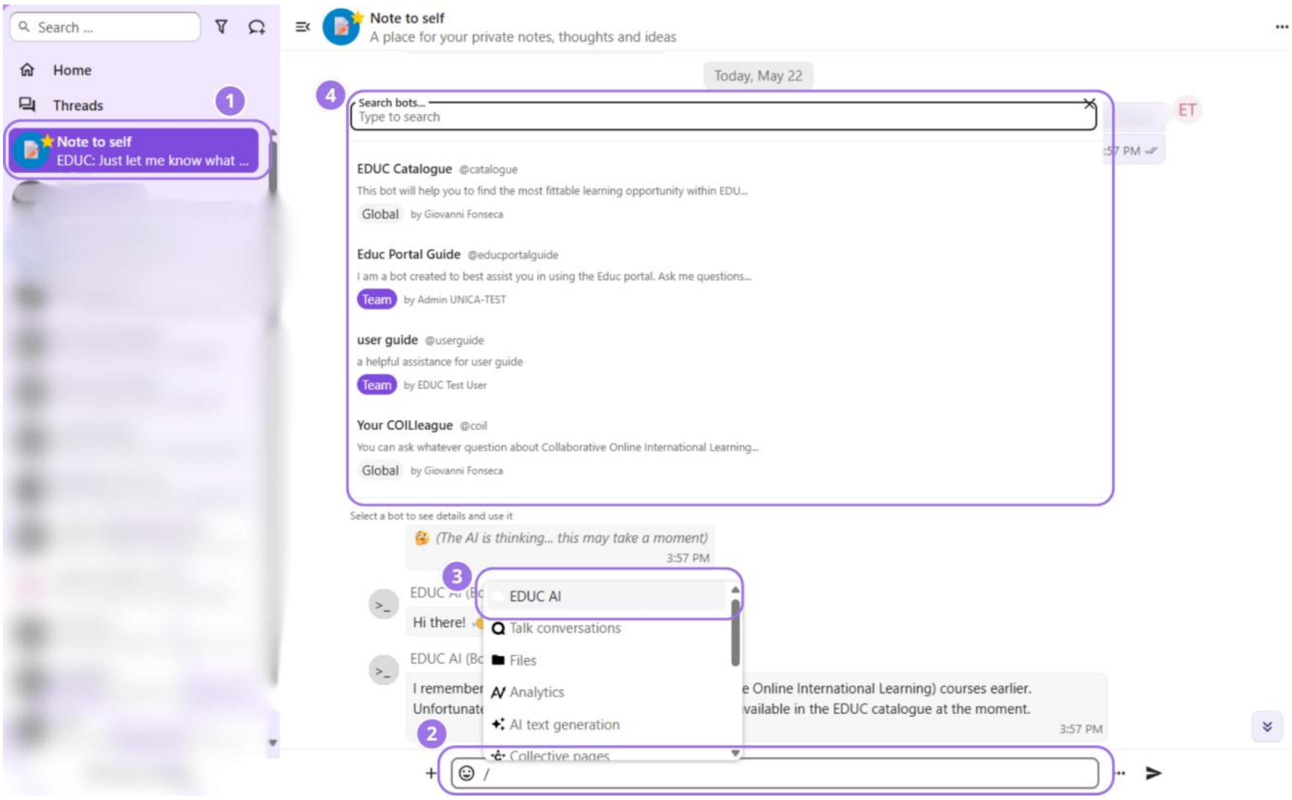
You can create bots based on specific content, such as onboarding material or course resources.

Enabling a chatbot in Talk

Before using a chatbot, it must be enabled in the conversation.

Steps:

1. Open a **Talk conversation**.
2. Type “/”
3. Select Educ AI
4. Choose from the available bots



107 Using a bot in a talk chat

Important:
Enable the bot to **read all the messages** in the conversation or only messages where it is mentioned.

You can now:

- Ask follow-up questions
- Continue the conversation
- Use it like a normal assistant

How chatbots work in practice

- Bots must be **enabled in the conversation**
- Bots are **activated with one call**
- After activation, they continue responding to your questions

This allows natural conversation flow

Example use cases

Chatbots can be used in many ways depending on how they are configured:

- **Course assistant**
- **Project assistant**

- **General support bot**

Recommended usage

- Enable only the bots you need.
- Name bots clearly according to their purpose.
- Use bots as support tools, not as a replacement for discussion.
- Keep questions clear and specific.

Quick summary

- Create bots in **Settings → EDUC AI**
- Enable them in **Conversation settings → Bots**
- Activate once using **"/" → EDUC AI → select bot**
- Continue asking questions normally

Glossary

Application or Apps: piece of software available on the EDUC Portal, with a set of functionalities and capabilities.

Apps categories: all the Apps available on the EDUC Portal are collected in the side menu and divided into: collaboration, learning and teaching, tools, websites and My University.

Markdown .md: a lightweight markup language used to format plain text documents. It provides a simple and readable syntax for creating structured content such as headings, lists, links, tables, images, and code blocks, while remaining easy to edit with any text editor.

For a complete overview of Markdown syntax and formatting options, refer to the official Markdown Guide: https://www.markdownguide.org/basic-syntax/

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