

Slack for the Ed-Fi Community

About Slack

Slack is a chat client that provides the Ed-Fi Community with a centralized way to communicate without overloading our inboxes. It will enable us to bring the community in to support each other and spread knowledge. Slack is geared toward technical collaboration and sharing by integrating with other tools such as JIRA, Confluence, and GitHub. Because the Ed-Fi Alliance wants the community to grow and wants community members to help with that growth, we welcome support, contributions, and suggestions from everyone, right there in Slack!

Setup

Because Slack is a web application, there's no installation necessary. You can [login online](#) or download the [desktop](#) or [mobile](#) clients from the App Store.

Rules

- **Complete your profile.** A complete profile gives everyone a better chance of knowing who you are. This includes your first name, last name (optionally followed by your location and [personal pronouns](#) in parentheses), profile picture (photos are preferred, but not required), phone number, and a summary of what you do and what teams you're on.
- **Abide by the [Ed-Fi Code of Conduct](#).** If you see anyone violating our Code of Conduct, please contact the Alliance.
- **Do not post anything that would make our systems vulnerable or would impact the privacy of others if it fell into the wrong hands.** (We'll use the [dbot by Demisto](#) to help watch for potential problems.)
- **Assume everything you share will be public.** Treat Slack as a public forum — the information you submit will *not* be confidential. This includes file uploads to Slack and any audio or video transmitted using a Slack Call.

Usage of the Ed-Fi Alliance Slack Channel

The Ed-Fi Slack site is configured to allow anyone with a Slack account to access our public channels. The Alliance intends to allow anyone who asks for an account to get one but we will limit access on certain administrative or announcement channels to Ed-Fi Alliance staff. We want the community to grow, therefore, we will allow licensees to approve access to their own users. These users may include:

- Staff designated by education agencies, such as SEAs, LEAs, or collaborative groups, who are licensed or at least in-process for licensing.
- Vendors who are certified or in-process for certification with Ed-Fi (as defined by the partnering agreement.)
- Contractors for which we have a Memorandum of Understanding (MOU)
- And the general public as guests to see what all of the excitement is about.

Usage of Other Slack Teams

You may be invited to an Ed-Fi Slack team through your **official email address**. Please ensure that your avatar and profile information are complete. If you are connected to other Slack teams with your work email, you may see those shared preferences.

Adding Users

Licensee or Vendor Staff

Fill out the user request form.

External Collaborators

You can and should invite partners, contractors, etc. to project channels to foster collaboration and asynchronous communication with the team. Projects or partner teams can [create](#) specific channels that end with `-partners`. While we want to make sure channels are appropriate to the topic, we also don't want to create duplication or confusion. Therefore, we suggest that team members start with an existing channel and then decide whether the crosstalk is proving difficult to manage. In short:

1. Create a `<project>-partners` channel, or use an existing channel.
2. Invite others to join!

Contents:

- [About Slack](#)
- [Setup](#)
- [Rules](#)
- [Usage of the Ed-Fi Alliance Slack Channel](#)
- [Usage of Other Slack Teams](#)
- [Adding Users](#)
 - [Licensee or Vendor Staff](#)
 - [External Collaborators](#)
 - [Friends](#)
 - [The Public](#)
 - [Inviting](#)
 - [Add a New Public Channel](#)
- [Questions for a Slack Admin](#)
- [Groups](#)
- [Tips](#)
 - [When to use @channel and @here](#)
 - [Frequently used emoji](#)
 - [Bots](#)
- [Appendix: Channel names and handy shortcuts](#)
 - [About Channels](#)
 - [Clusters of channels \(Initially\)](#)
 - [Channel naming conventions](#)
 - [Shortcuts](#)
- [Still have questions?](#)

Friends

Friends from education institutions, usually with .edu email addresses, who aren't collaborating on a project can be invited into [#friends](#), or any of the public channels. Fill out the user request form.

The Public

The Ed-Fi Alliance has specific channels in Slack that are intended for public use. These channels will not have `dev`, `admin`, or `support` in their name to signify a channel meant for those groups. Treat these channels like you would a town hall or other type of public meeting. Members of the public must also comply with the Code of Conduct when using all Ed-Fi Community tools including Slack.

Inviting

To invite people to a public Slack channel, send them to ed-fi-alliance.slack.com and have them select the appropriate channel from the drop-down.

Add a New Public Channel

See the instructions in Slack, but it really is as simple as clicking the **+** next to Channels in Slack.

Questions for a Slack Admin

Most admin requests can be handled right there in Slack, so, go ahead and ask. But if you get stumped, go ahead and send an email to help@ed-fi.org.

Groups

Slack Groups allow you to direct messages to a specific list of people in a more precise way than an **@channel** or **@-here**. Any full member can view, create, and edit Slack groups at will.

Groups are a great way to alert people who might not be in a channel about something that needs their attention or make sure urgent incidents are directed to the right people and not an entire channel. For example, you can ping **@dev-admins** in `#admin-support` if you have an urgent issue instead of using an **@channel** or use **@admin-support** to alert that group of a conversation in another channel that we should see immediately.

Tips

- **Slack is subject to FOIA** and is therefore potentially part of the public record (written words that are attributable back to you). Don't say something on Slack that you wouldn't feel comfortable appearing on the news.
- Slack provides some [formatting tips](#) to make your messages extra fancy.
- **When customizing your profile** with your location or [personal pronouns](#), consider also adding those details to the Last Name field so they appear alongside your messages. This is a great way to be remote-friendly and gender inclusive. Otherwise, your colleagues need to view your profile to see that information. Many people use airport codes instead of city names to indicate their location.
- **The advanced settings section** provides an option for *only showing channels that have unread messages*. This is useful if you're a member of a lot of channels.
- **Click the timestamp** on any post to go to the archival view of it. This is helpful if you'd like to cross-post a link to a message in another channel.
- **When using Slack on mobile:** mentioning someone in a channel they aren't in won't notify them, and you won't get the option to invite someone after mentioning them.
- **Feel free to pop in and out of channels.** You can `/mute` channels (so you only receive messages when your name or `@channel` is mentioned) or leave channels if they become overwhelming.
- **If you're interested in tracking specific keywords across Slack**, set up [highlight word notifications](#).
- **To add an RSS feed to any channel**, type `/feed subscribe <RSS URL>`.
- **Never use Slack to share secure information.** If you need to share short bits of text securely, use [Fugacious](#). If you want to say something private, it's easy to ask someone to hop on a call. (See the [shortcuts](#) below.)
- **You can use Slack as an archival system.** But there is a limit of 90 days. It has a [powerful search feature](#) and you can search specific channels or conversations. For instance, if you have a question about a specific healthcare plan, search for that in Slack before asking.
- You can also search by tagged emoji. To see all messages tagged with a particular emoji, search Slack for `has:` (for example `has::evergreen_tree:`).
- **Set Slack boundaries when you need to be heads-down** by [setting your status](#) to *Away*. If you use Slack on mobile, you can **prevent direct messages and mentions from pinging you when you're not working**. Just set your phone to Do Not Disturb mode or temporarily turn off

notifications from the Slack app. Don't worry — though we have different schedules and may message each other at strange times, there's no expectation for people to respond when they're not working.

- **Praise your coworkers.** If you'd like to praise someone for doing good work, start a message with `love @username` or `:heart: @username` in [#general](#), or any channel in which [Charlie](#) is present. You can also see recent praise in [#love](#).
- **Use text encoding when pasting a large chunk of text.** Use the + sign to the left of the text box to create a snippet. There will be an option to select how you would like to encode the text; select plain text to avoid smart quotes, if you're pasting code.
- **Emojis come in different colors.** Tired of tabbing through multiple skin color emoji to find the one you want or identify with? Click on the Emoji Deluxe picker (the smiley face in the text box) - then click on the emoji in the bottom right corner. You can then select a default color going forward.
- **Change your color scheme.** You can change your color scheme by going to Preferences → Theme → Custom Theme. Paste the following for the US Design Standards theme: `#112E51, #205493, #0071BC, #FFFFFF, #323A45, #FFFFFF, #4AA564, #981B1E`
- **Screen-sharing tip:** If you want notifications to stop showing up so people don't see them, hover over the Notification Center icon in the top right corner of your screen and **Option + click** on it. Repeat that to turn notifications back on.
- **Use #news for vital team announcements.** [#news](#) is an announcement-only channel where only administrators can post. If you have a post you'd like to go up in [#news](#), ping [@commsquad](#) to get a review of the language, then ask in [#admins-slack](#) for someone to post it to [#news](#). Please keep [#news](#) posts limited to information that the entire team needs to know. This includes things like:
 - Required trainings
 - Necessary security and compliance actions
 - Policy changes or reminders
 - All-team events
 - Senior management team meeting notes
 - Changes or actions that impact the entire team

When to use @channel and @here

- Type `@channel [message]` to send your message to everyone in the channel. Use sparingly and only if everyone in the channel needs to see your message.
- Type `@here [message]` to send your message to everyone in the channel with Slack open **at a desktop computer**. Don't use this as a softer version of an `@channel` because there will be no notification for anyone who wasn't at their computer.

Frequently used emoji

`:check:` = I did this or verified it was done

`:plus:` = I am a +1 for the above

`:100:` = I am a SUPER +1 to the above OR this comment is keeping it 100 (as in, keeping it real, speaking the 100% truth)

`:thumbsup:` = Sounds good

`:question:` = I don't understand this/needs followup

`:point_up:` = I would also say this (can mean "this is correct" if you are the decider)

`:raccoon:` ==> Slack channel = Please consider moving this conversation to a different channel. (It's a raccoon because of [this image](#) referenced in [this article](#).)

`:raised_hand:` = I volunteer

`:raising_hand:` = Have time for a question? (Keep in mind that many folks strongly prefer that you also add what your question is about so they can determine its urgency.)

`:thanks:` = A picture of Tom Hanks (T. Hanks -> thanks) used as a shortcut to say "thanks"

`:facepalm:` = Disbelief, shame, or exasperation.

`:troll:` = I'm intentionally [trolling](#) you or making a joke

Bots

- [Slackbot](#): We automate responses to frequently asked questions with a Slackbot. You can update or customize responses [here](#). (You can also [add emoji](#)). **Do not include private or sensitive information in Slackbot automatic responses.**
- **More to come!**

If you're interested in learning more about the bots, or perhaps contributing to them, pop into [#bots](#).

Appendix: Channel names and handy shortcuts

About Channels

Here are some criteria that should help identify ideal working channels:

- Relevance - Use topical names only
- Flow - Making sure the conversation doesn't get lost
- Responsiveness - No abandoned chats

In short, channels should work for the community. Even if channels are topical, if they are empty of contributors or slow to respond, they are at best unhelpful and at worst counterproductive.

Channels should organize around the questions, people, and teams that would realize their benefits.

Clusters of channels (Initially)

- Users
 - general
 - admin-support
 - (Suggestion are appropriate here.)
- Developers
 - dev-data-standard
 - dev-ods
 - dev-dashboards
 - dev-tools
 - dev-api
- Partners
 - (none yet.)

Channel naming conventions

- Channels that begin with `admin-` include administrators for various tools. [#admin-support](#), for example, is used to request invites to Slack (see above), expunge a particularly offensive/off-topic message (see above), change the name of an existing channel, and so on.
- Channels that end with `-partner` are sponsored for partners.
- Channels that begin with `dev-` are intended for active development teams but may include members of the public. We would ask channel participants to redirect users' and their questions to the appropriate user channel.

Shortcuts

- Type `@channel [message]` to send your message to everyone in the channel. Use sparingly and only if everyone in the channel needs to see your message.
- Type `@here [message]` to send your message to everyone in the channel with Slack open **at a desktop computer**. Don't use this as a softer version of an `@channel` because there will be no notification for anyone who wasn't at their computer.
- Type `/me [message]` to "emote" your message. (Just try it.)
- Type `/mute` to suppress notifications from the channel you're currently in. You can also turn on desktop notifications for specific channels.
- Type `/hangout` to start a Google Hangout in the current channel.
- Type `/hero` to start Screen Hero automatically.
- Type `[message] XPOST #channel-name` to cross-post a message to a different channel while posting it.
- Type `/remind` to remind yourself to do something in the future.
- Type `love @username for [message]` to publicly praise and thank someone.
- Press `Option + Up` or `Option + Down` to switch between channels and direct messages.
- Press `Esc` to mark all messages in the current channel as read.
- Press `Shift + Esc` to mark all messages across all channels as read. Only do this if you've caught up in channels for your projects first.
- Press `Command + K` or `Command + T` to switch between channels and direct messages by name.
- Press `Command + [` and `Command +]` to jump back and forth along your history of DMs /channels.
- To mark messages as unread, click a message on your phone and select *mark unread* or press `Alt` and then click your mouse to do so on your desktop.

Still have questions?

Ask in Slack!