

Contents

Overview	1
Platform Organizer Guide	1
Platform Management	1
User and Content Oversight	1
Compliance and Governance	1
Democratic Leadership	2
Host Management	2
Host Navigation	2
Dashboard Overview	2
Newcomer Navigator NL	2
Better Together Core	2
Platform Details	3
Privacy & Invitation Tokens (Events)	3
Roles & Permissions	3
Platform Roles & Permissions	3
Community Roles & Permissions	4
User Accounts	4
Metrics & Reporting	4
Search & Notifications & Caching	4
Host Dashboard Extensions	4
% Better Together Community Engine Guide % Auto-generated (platform_organizers) % \today	

Overview

This PDF bundles the primary Community Engine documentation for platform_organizers. Source of truth remains the repository markdown; diagrams should be re-rendered before export.

Platform Organizer Guide

This guide helps elected platform organizers manage platform-wide operations while supporting community autonomy and democratic decision-making.

Platform Management

- Host Management Guide - Technical platform management
- Host Dashboard Extensions - Advanced management features
 - See: Privacy & Invitation Tokens (Events)

User and Content Oversight

- Accounts & Invitations - User lifecycle
- Community Social System - Moderation & social tools
- Metrics System - Analytics and insights

Compliance and Governance

- Roles and Permissions - Authority structure and delegation

- Privacy Principles - Platform security & privacy

Democratic Leadership

Platform organizers are elected by the platform community and serve to support community organizers while maintaining platform-wide standards and cooperative values.

Host Management

This section covers all administrative features available to platform hosts.

Host Navigation

The host navigation bar provides quick access to key administrative areas:

- **Dashboard:** View high-level metrics, recent activity logs, and shortcuts to common tasks.
- **Communities:** Create and manage community instances, configure privacy and membership settings.
- **Navigation Areas:** Define and publish header, footer, and sidebar menus with nesting and visibility controls.
- **Pages:** Build and maintain CMS pages using the block editor, schedule publishing, and assign navigation.
- **People:** Search and edit person records, manage profiles, community memberships, and special access flags.
- **Platforms:** Configure platform-wide metadata (name, description, logo) and global privacy/invitation rules.
- **Roles:** Establish user roles at platform and community levels, specifying purpose and default privileges.
- **Resource Permissions:** Assign fine-grained CRUD permissions on resources to defined roles for access control.
- **Resources:** Upload, categorize, and version downloadable assets (PDFs, images, reports) for reuse.
- **Content Blocks:** Review and configure reusable block types (rich text, images, templates, etc.) for the page editor.
- **Metrics Reports:** Generate CSV exports and view charts for page views, link clicks, downloads, and shares.

Dashboard Overview

Newcomer Navigator NL

- **Partners:** Onboard partners by creating profiles with names, descriptions, logos, and geo-coordinates.
- **Resources:** Curate newcomer assets (guides, checklists, videos) and control download permissions.
- **Journey Stages:** Outline sequential phases of the newcomer experience, assign stage labels and ordering.
- **Topics:** Tag resources and pages with topic labels for easier filtering and discovery.
- **Journey Maps:** Build visual flowcharts mapping stages, topics, and resource links to guide newcomers.

Better Together Core

- **Communities:** Spin up new community sites, configure membership rules, customize branding and privacy.

- **Navigation Areas:** Manage site-wide menu structures, assign them to layouts or specific pages.
- **Pages:** Author content pages with drag-and-drop block editing, manage drafts and publish schedules.
- **Platforms:** Update platform metadata (name, logo, description), set language/localization defaults.
- **People:** Administer person records, view activity logs, reset access, and manage guest access tokens.
- **Roles & Permissions:** Define role-based access rules, map permissions to resources, and cache policy for performance.
- **Users, Conversations & Messages:** Monitor registered users, initiate or audit conversation threads, and review message history.
- **Categories:** Create and manage taxonomy for content and events to improve discoverability.

Platform Details

Under **Platforms**, edit these platform settings:

- **Name & Description:** Set the display name, subtitle, and descriptive text for the platform header and meta tags.
- **Privacy Settings:** Choose whether the platform is public, private (invite-only), or hidden from unregistered users.
- **Invitation Requirements:** Toggle whether users need an invitation code to register or if self-registration is open.

Privacy & Invitation Tokens (Events)

- Private platforms: when privacy is set to private/invite-only, public browsing is limited. However, valid event invitation tokens allow invitees to access the specific event page without broad platform access.
- How it works:
 - Invitee opens an event invitation link (`/invitations/:token`) or an event URL with `?invitation_token=...`
 - The token is validated against a pending, non-expired EventInvitation for that event.
 - On success, the token (and invitation locale) is stored in session, allowing access to that event page even if the platform is private.
 - Invalid/expired tokens on private platforms redirect users to sign-in.
- Registration mode: if “Requires Invitation” is enabled for platform registration, new users must provide a valid platform invitation code to register. Event invitations do not replace platform registration codes; they only grant access to view/respond to the specific event.
- Security notes:
 - Tokens are scoped to a single event and do not grant global access.
 - Token validity windows can be set per invitation (`valid_from/valid_until`) and status changes remove access.

Roles & Permissions

Roles and permissions are managed independently at the platform and community levels to provide scoped access control.

Platform Roles & Permissions

- Define global roles that apply across the entire platform, then grant or revoke specific resource permissions per role to control CRUD access.

Community Roles & Permissions

- Create roles scoped to individual communities and assign permissions to control access to community-specific features and content.

Note: Permission checks are cached per role to optimize database performance and reduce authorization overhead.

User Accounts

- **List:** View all registered users, filter by status, role, or last sign-in date.
- **Registration & Sign In:** Configure email workflows for user onboarding, password resets, and account confirmations.
- **Profiles:** Enable users to update personal information (avatar, contact info, preferences) and manage privacy settings.

Metrics & Reporting

- The engine collects and visualizes these core metrics:
- **PageView:** Measures views on pages, people, communities, and partners. Available charts include views by page (bar) and daily totals (line).
- **LinkClick:** Logs each tracked link interaction with charts for clicks by URL and daily trends.
- **Download:** Records downloads of resources and exported reports with charts of downloads by file name.
- **Share:** Tracks share button clicks per social platform, offering charts for shares by platform and per-URL breakdowns.

All metrics support date-range filtering and locale-specific breakdowns, with CSV export for offline analysis.

Future reports will include user engagement dashboards, invitation conversion analytics, partner link-click reports, and additional metric types such as search queries and journey map interactions.

Search & Notifications & Caching

- **Search:** Full-text search powered by Elasticsearch, indexing pages, posts, people, and events with faceted filtering support.
- **Notifications:**
 - **Email:** Configurable notification templates for actions such as invitations, mentions, and password resets.
 - **In-app:** Real-time alerts delivered via ActionCable with both ephemeral toast messages and persistent notification feeds.
- **Caching:** Implements fragment and page caching for navigation and content blocks, with Redis-backed cache stores and optional CDN integration to speed up delivery.

Host Dashboard Extensions

The host dashboard provided by Better Together includes a hook for host applications to display custom resources.

To add your own content, create the following partial in your host application:

```
app/views/better_together/host_dashboard/_host_app_resources.html.erb
```

Any markup placed in this partial will be rendered near the top of the dashboard. This is useful for linking to admin areas or providing host-specific information.

Example:

```
<!-- host app: app/views/better_together/host_dashboard/_host_app_resources.html.erb -->
<div class="row my-4">
  <div class="col">
    <%= link_to 'My Custom Admin Area', my_custom_path, class: 'btn btn-primary' %>
  </div>
</div>
```

If the partial is absent, the dashboard simply skips this section.