Community: Getting Started User Guide

Welcome to the online community! This is intended to serve as a portal for collaboration focused on empowering your organization.

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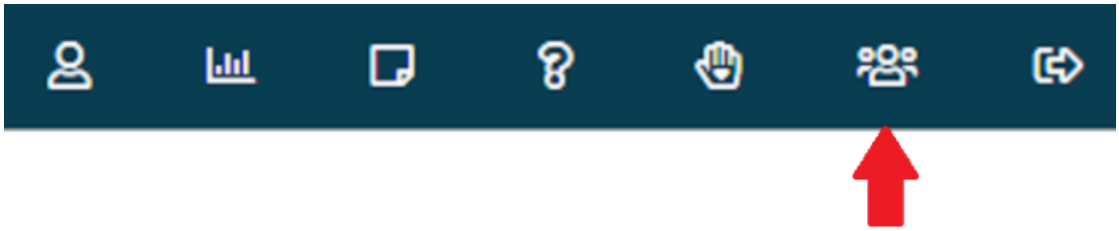
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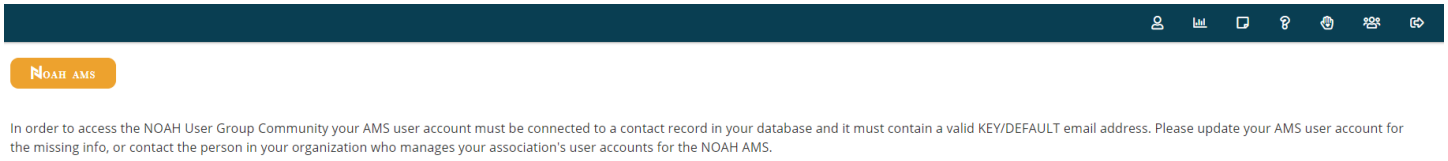
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Logging In

To Access the Community, you must login via the button at the top right of the AMS.



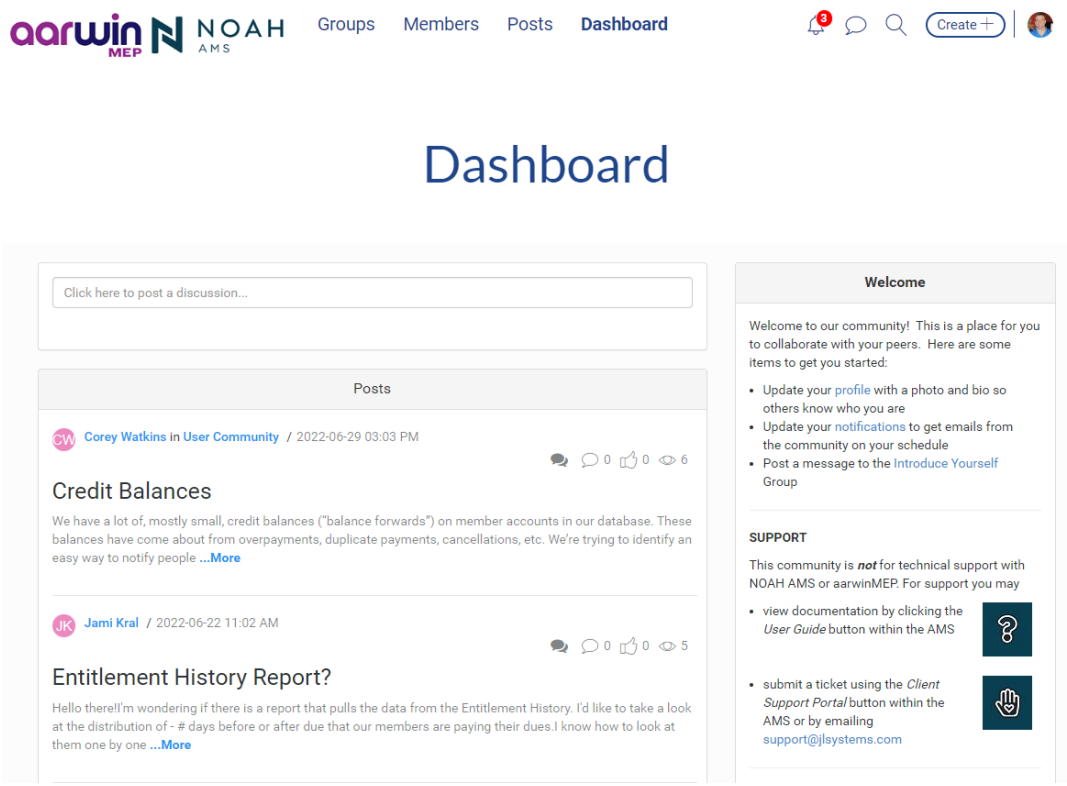
NOTE: Your staff ***User Account*** must be tied to a Contact and that Contact must have a key email address. If not, you will get the following message:



These 2 items are used to populate your profile in the community.

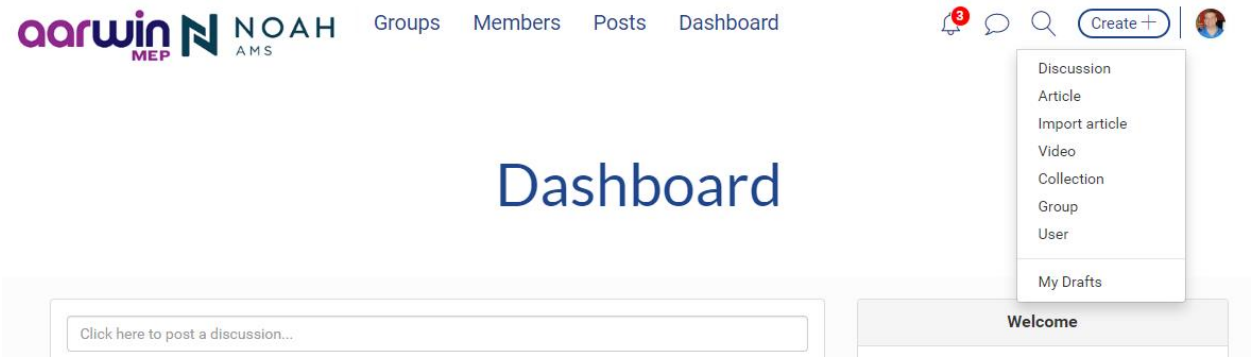
Dashboard

Dashboard is the first page displayed to the users every time they log in. From this page, a user can immediately view all recent content that the user has permission to view.



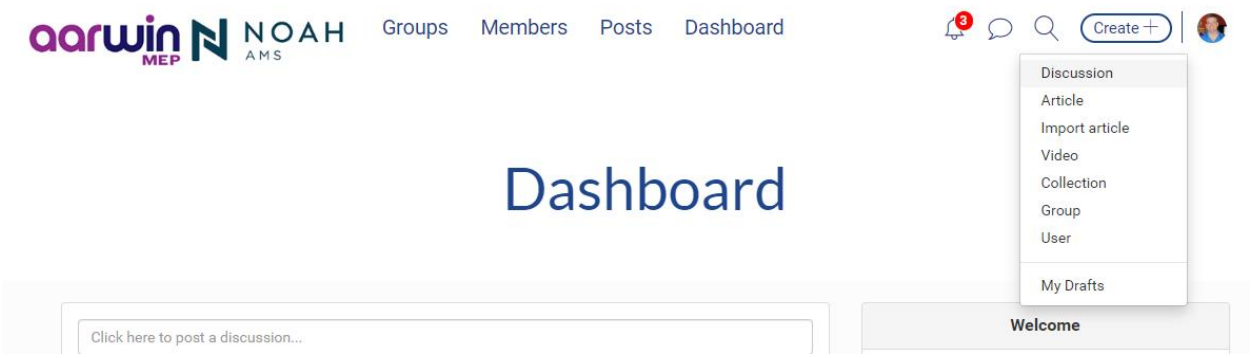
Also note that you will have messages and system notifications at the top that haven't been viewed online since your last login. Click on either icon to view.

To immediately start adding content to the online community, click on the Create+ button. This will give the user the choices of content types the user can create.

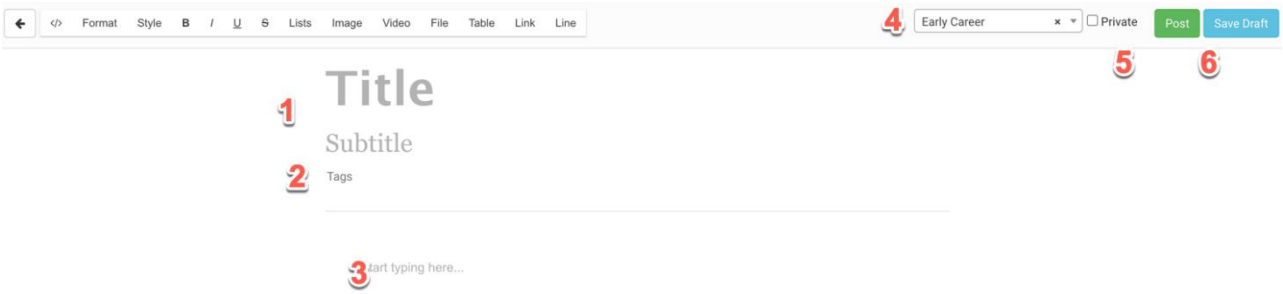


Discussions

To create a new discussion thread, in the main top navigation, click on **Discussion** under the **Create +** button



The discussion post is created on the following page:



1. Add the title of the discussion
2. Create tags if applicable. Type in each word and hit “Enter” to create each new tag
3. Type in the text of your discussion in this area
4. Choose the group that the discussion will be posted to.
5. Click on the **Private** checkbox if you want the discussion to be only viewable to members (Only applicable to public groups. The private checkbox will automatically be checked if the group is private)
6. Click on the **Post** button to make the discussion live or click on the Save Draft to save your content for later editing or posting.

To view the new discussion, click on the Open button on the discussion creation page

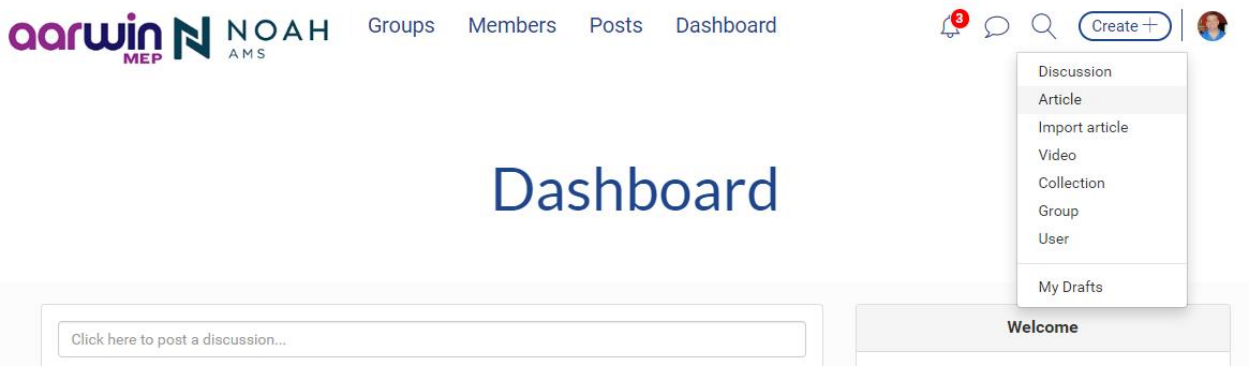


You can also view the new discussion listed on the homepage of group that it was posted.

Click on the discussion to view the full discussion thread.

Articles

To create a new article, In the main top navigation, click on **Article** under the **Create +** button



The article is created on the following page:



1. Add the title of the article
2. Create tags if applicable. Type in each word and hit "E**nter**" to create each tag
3. Type in the content of your discussion in this area.(Please note the formatting tools at the top of the page.)
4. Choose the group that the discussion will be posted to.
5. Click on the **Private** checkbox if you want the article to be only viewable to members (only applicable to public groups)
6. Click on the **Post** button to make the article live or click on the Save Draft to save your content for later editing or posting.

To view the article, click on the **Open** button on the article creation page

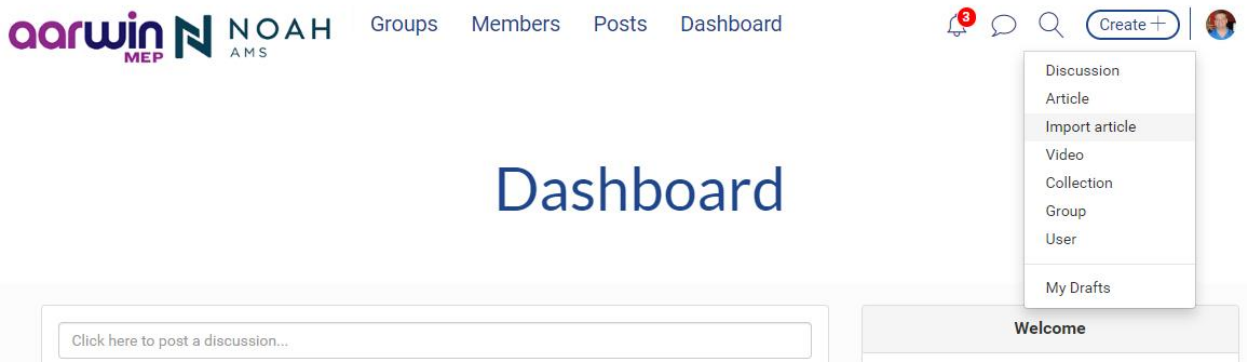


You can also view the new article listed on the homepage of the group that it was posted. Click on the article to view the full content of the article

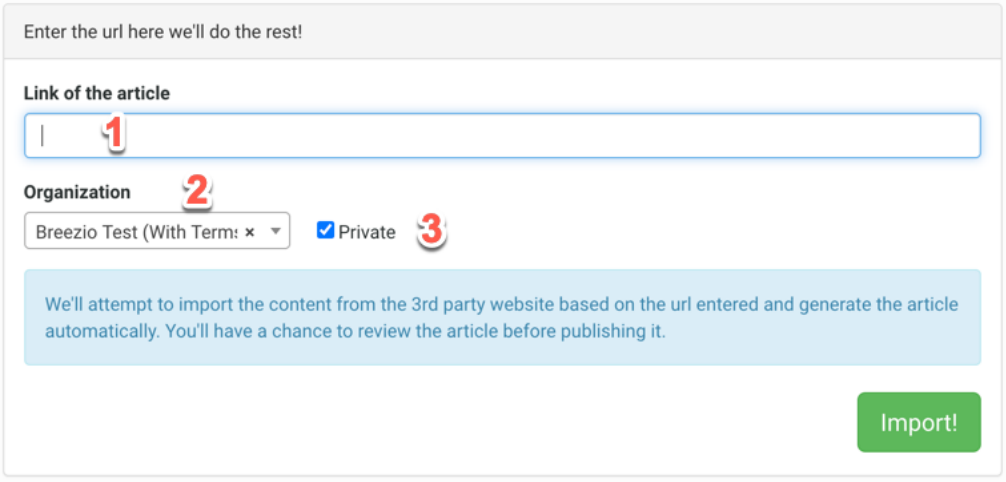
Import Articles

The online community allows the import of videos that are hosted on YouTube and Vimeo only.

To import articles from outside the community, go to the **Create+** button and choose **Import Article**



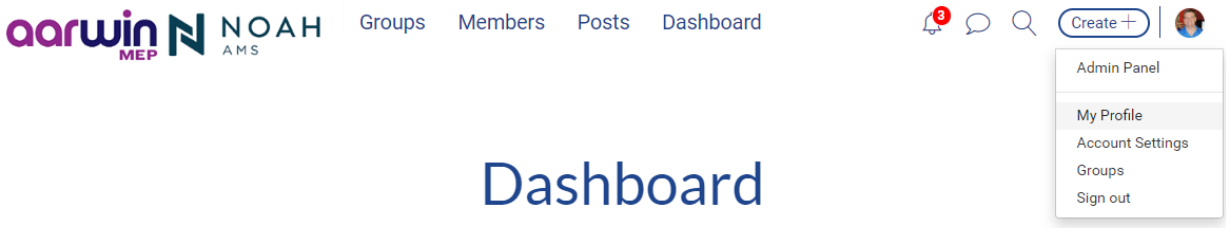
On the next page, add the article information



1. Copy the link of the webpage
2. Choose the group that the article will be posted to.
3. Click on the **Private** checkbox if you want the video to be only viewable to the group members (only applicable to public groups)
4. Click on the **Import** button to make the video live on the community
   Please note: Creating the video page does not publish the video live
5. Upon import of the article into the group, the user can add tags

Profile

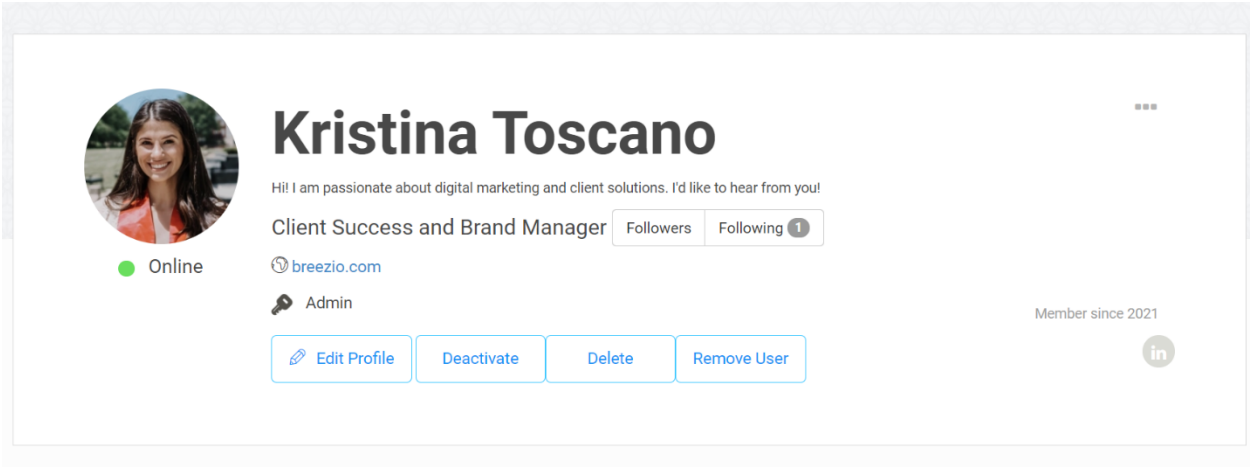
To view and edit your profile, click on the arrow icon next to your name in the top main navigation.



Click “Edit Profile”. Fill out any information about yourself. There are several text options available to fill your profile that you may keep in your community or customize.

Some default options:

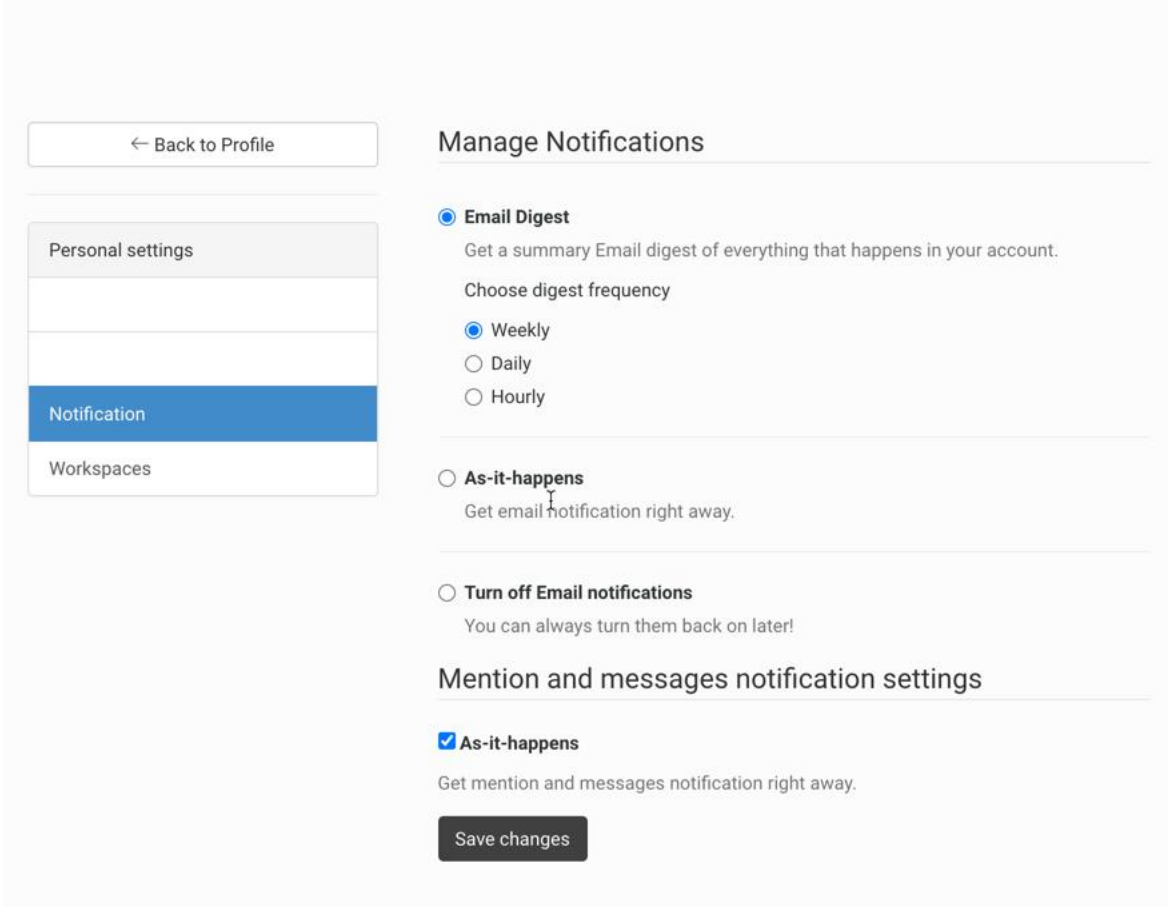
- First Name
- Last Name
- Email
- Title
- Bio



Notifications

Notifications are the emails that the user will receive when any content is created, edited or deleted.

To change the frequency of the notification that a user receives, go to the user icon and choose **Account Settings**.



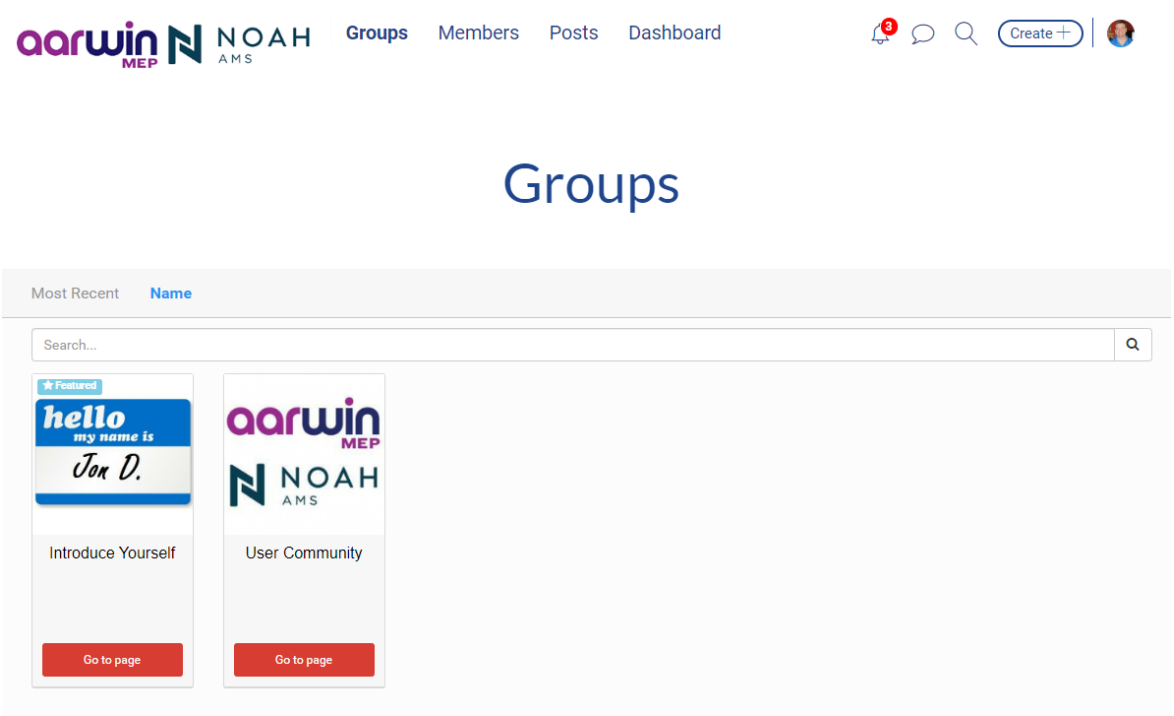
The user can choose a digest of all notifications in immediately, hourly, daily, or weekly intervals. Note that As-it-happens will send an email for every new piece of content including comments.

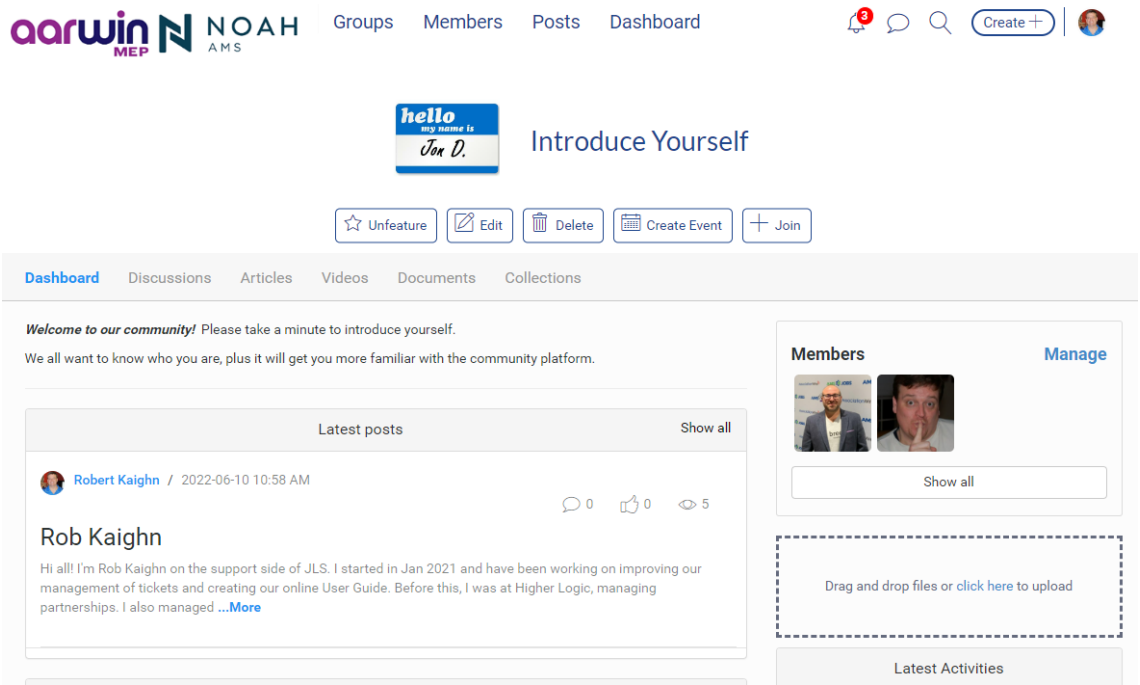
The Mentions and messages notification setting is used if a person is @mentioned in a comment or a chat.

Click on **Save Changes** button to save any edit to the settings.

Groups

Groups are the spaces that a user already belongs or is allowed to join. Clicking on Groups in the main navigation will bring you to all the group spaces users are allowed to view and contribute. To enter the group, click on the Go to page button.



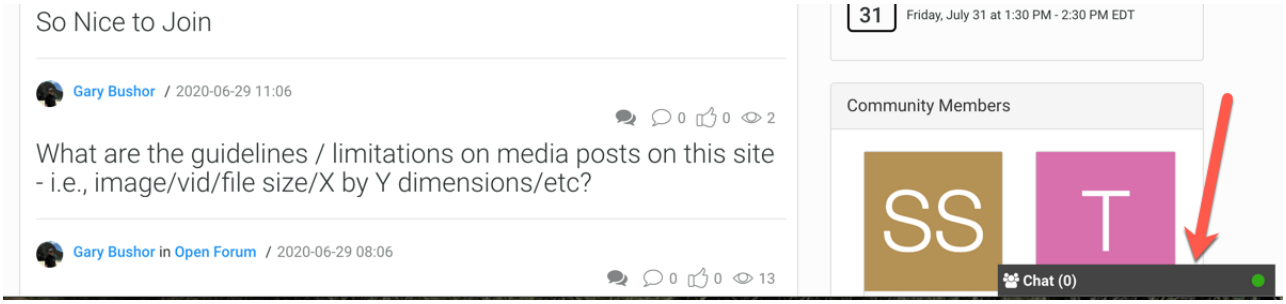


1. Select **Create +** in the workplace sub navigation. This will allow you to create content, similar to the Create + button in the main nav. The system will automatically auto-populate the workspace you are currently in.
2. Latest Posts displays all content created for this workspace from the workspace members
3. Upload documents using the document upload module. You can choose to find the document on your computer or you can drag/drop the file onto the module.

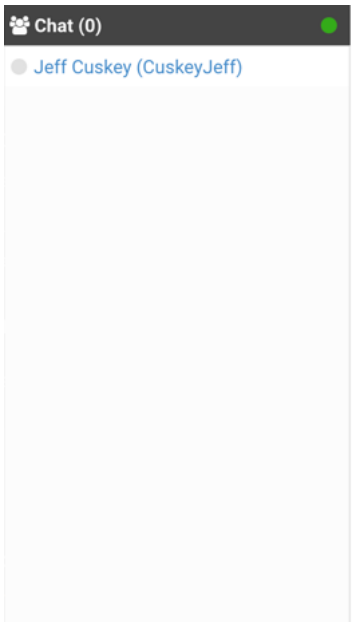
If you belong to many workspaces, click on the Favorite button to make the workspace display at the top of the **Group** page

In Portal Chat

At the bottom of every page is the in-portal chat box. This shows how many people are currently online in the community that you have chosen to follow and your status.



Clicking on the box will expand the box and display users that you have chosen to follow.

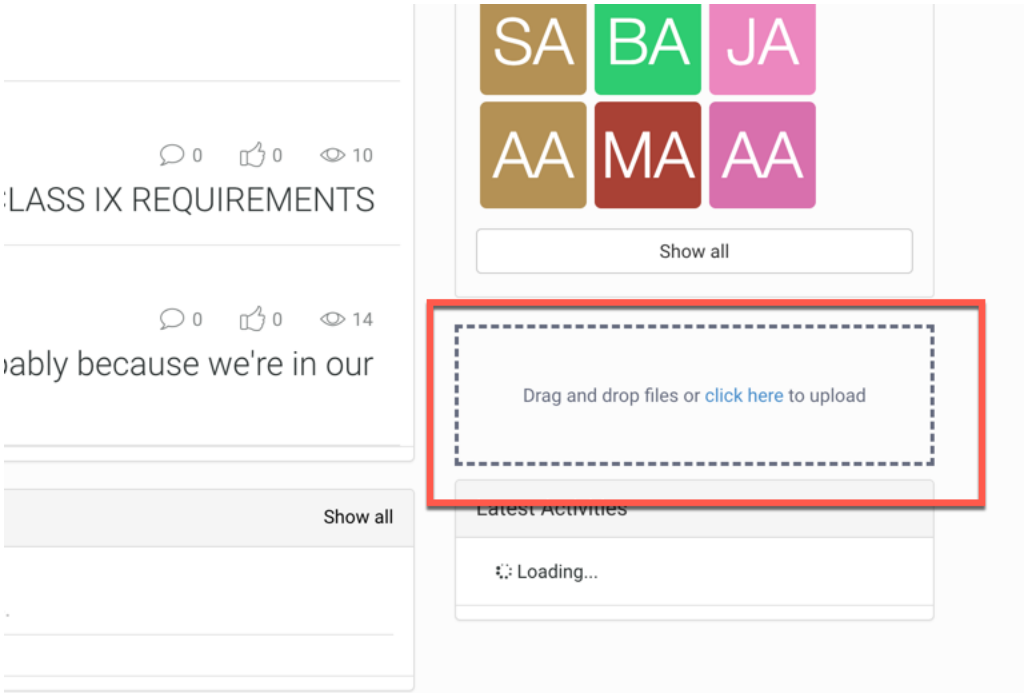


- Each person on the list will have a status flag as well.
- Green represents they are online and active.
- Yellow represents they are logged in but have been inactive in their current session for 30 minutes.

To begin a chat, just click on the username and another box will open to start your chat. If the person is not currently online and you send them a chat, they will receive a notification email alerting them to your chat.

Upload Files

To upload a file, you must go to the group that you want the file to reside. Once in the correct group, scroll down the page. There is a module on the right for uploading files

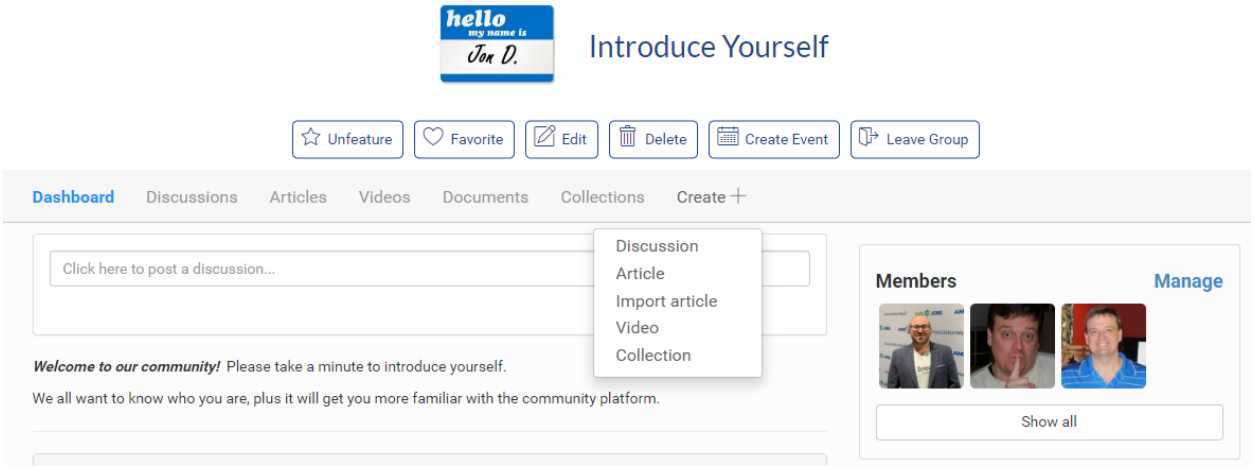


You can drag and drop a file into the module or click on the link to find the file on your computer. Once uploaded, the system will present your file in the window.

Please note: The system is capable of previewing PDF and image files but Word, Excel, Powerpoint document are not viewable in portal. You must download the file to your computer to be able to view those file types.

Creating Collections

A collection is a group of related content items.



1. To create a project, go to the group and under the **Create+** menu in the subnav, choose **Collection**
2. Name your Collection in the Title field
3. Add all the content by dragging and dropping content from the right menu to the left.
4. Click the **Private** checkbox if you only want the post to be visible in your group

