



SHAREPOINT FOR MEMBERS USER'S GUIDE



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Contents

User's Guide	4
Signing in to SharePoint for Members	4
Getting around in SharePoint for Members	6
Communities sites	9
Joining an opt-in community	10
Keeping track of changes	12
Set up an alert	13
Subscribe to an RSS feed	14
My CRM Dashboard	15

USER'S GUIDE

Welcome to the SharePoint for Members User's Guide.

SharePoint for Members is a website that you can use to work with the various association communities you are a member of—chapters, rosters, committees, interest groups, and ad-hoc communities. You'll be able to find resources, connect with other members, participate in discussions, and collaborate on projects specific to your communities.

In addition, SharePoint for Members provides direct access to the Protech Web Portal, where you can update your contact information, renew your membership, and find and register for events.

This user's guide will help you log in to and find your way around the SharePoint for Members site, and it includes the following topics:

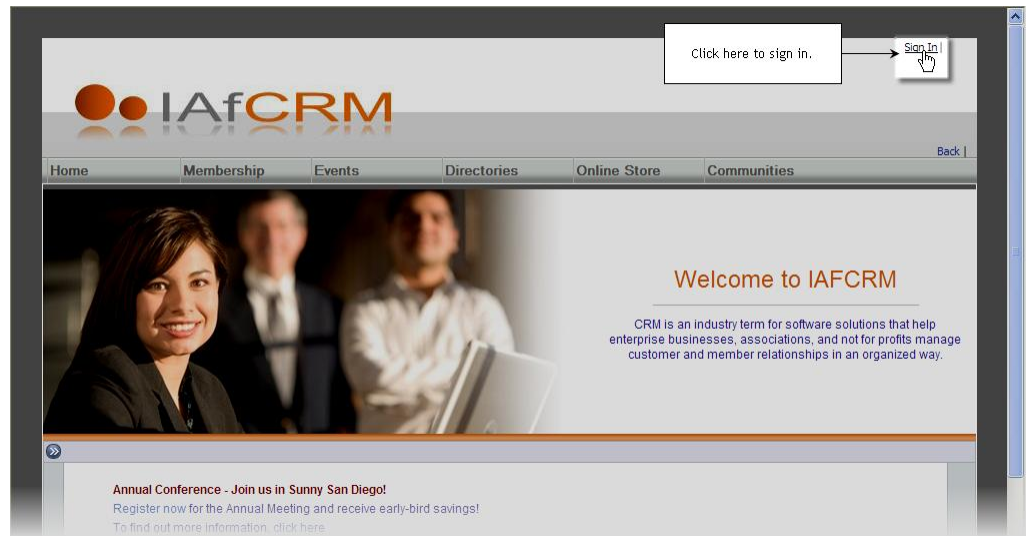
- [Signing in to SharePoint for Members](#)
- [Getting around in SharePoint for Communities](#)
- [Communities sites](#)
- [Joining an opt-in community](#)
- [Keeping track of changes](#)
- [Set up an alert](#)
- [Subscribe to an RSS feed](#)
- [My CRM Dashboard](#)

Signing in to SharePoint for Members

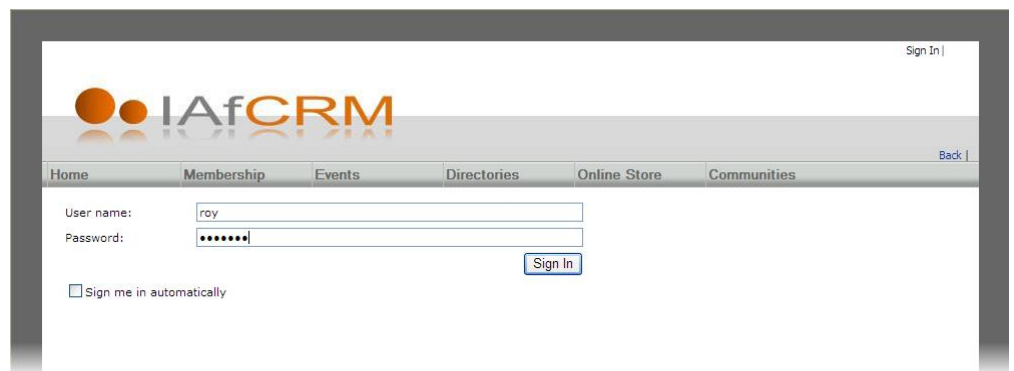
In order to access your communities in your association's SharePoint for Members site, you must log in, using the same user name and password that you use to sign in to your association's Web Portal.

1. In your browser, open the SharePoint for Members home page.
2. Click the **Sign In** link in the upper right corner.

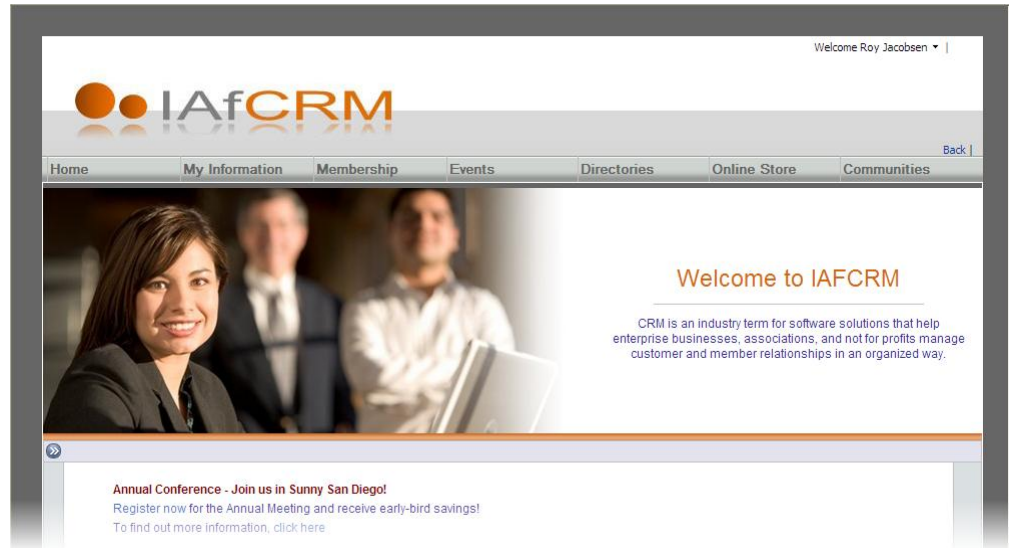
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3. The sign-in page appears. Enter your user name and password, then click **Sign In**.

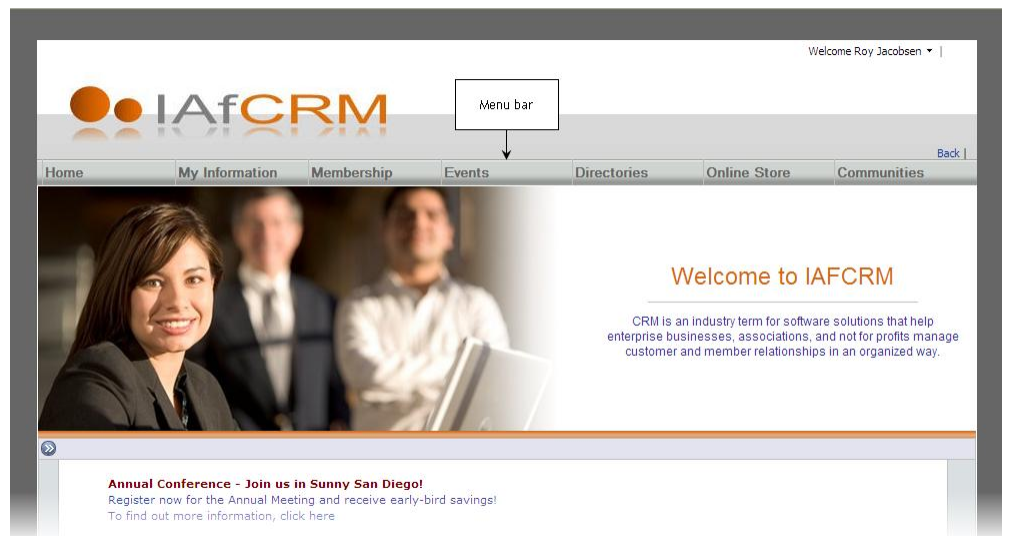


4. The home page will reappear. Your name will be displayed in the upper-right corner.



Getting around in SharePoint for Members

You'll use the Menu bar to navigate from one area to another in SharePoint for Members. The Menu bar includes menus and buttons that you'll use to open new pages and complete tasks.



In some cases, you'll activate the menus by holding your mouse pointer over the menu button; a menu will then appear and you can make your choice. In other cases, you'll click the menu button to go directly to the target page.

The Menu bar on the SharePoint for Members home page has more options than it does within each of the communities sites.

Menu bar on the SharePoint for Members home page

On the SharePoint for Members home page, the Menu bar includes the following menus:

Home—This menu includes the following options:

- Change Login: Click this option to change your login name.
- Change Password: Click this option to change your password.

Important

Changing your login name and password for SharePoint for Members also changes them for Protech Web Portal.

- Logout (WP): Click this option to log out from your association's Protech Web Portal.
- Default Web Portal Page: Click this option to open the home page of your organization's Protech Web Portal site.



My Information—The options on this menu will open pages in the Protech Web Portal, where you can work with the following options:

- My Profile
- My Company
- My Pledges
- My Committees
- My Chapters
- My Exhibit Contract
- My Shopping Cart
- My Groups

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Membership—This menu includes options for working with your membership and subscription information on the Protech Web Portal:

- Renewal Online
- Renew Company Dues
- Renew a Subscription



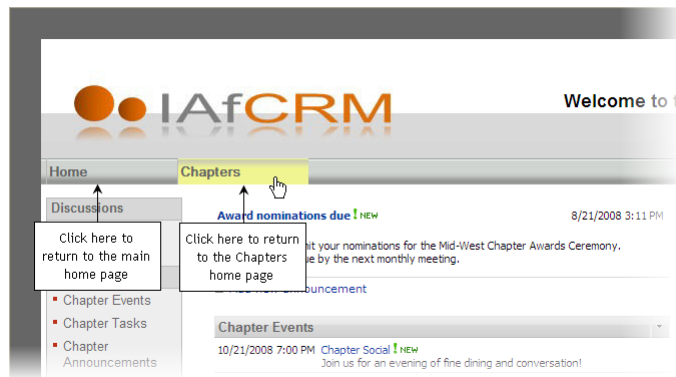
Communities—You'll use this menu to open the home pages for each of the types of communities within SharePoint for Members. The options on this menu include the following:

- Chapters
- Rosters
- Committees
- Interest Groups
- Community

Menu bar on communities sites

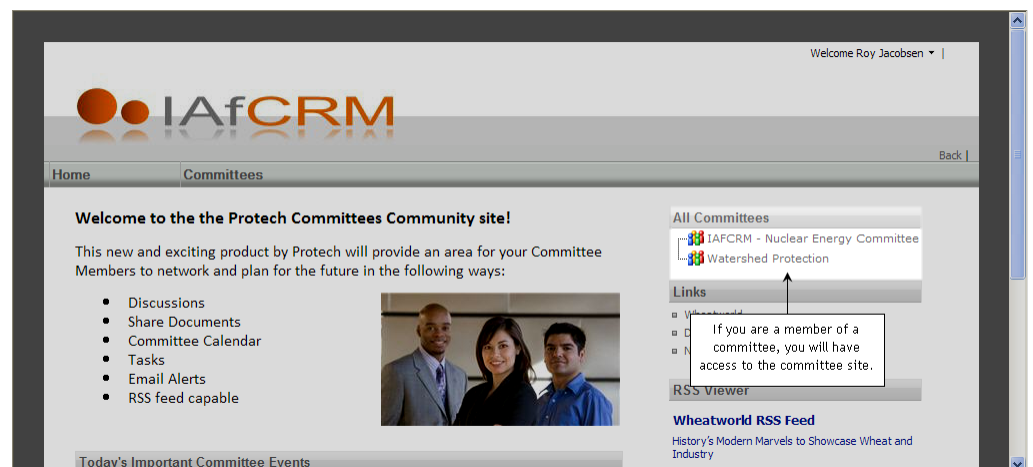
When you are working in the communities sites, such as the Chapters site or the Committees site, the Menu bar will have only two buttons. Clicking the **Home** button will take you to the top-level SharePoint for Members home page. Clicking the second button will take you to the home page for the communities site you are currently in.

For example, if you are working in the subsite for one of your chapters, clicking the **Chapters** button will take you to the Chapters site home page.



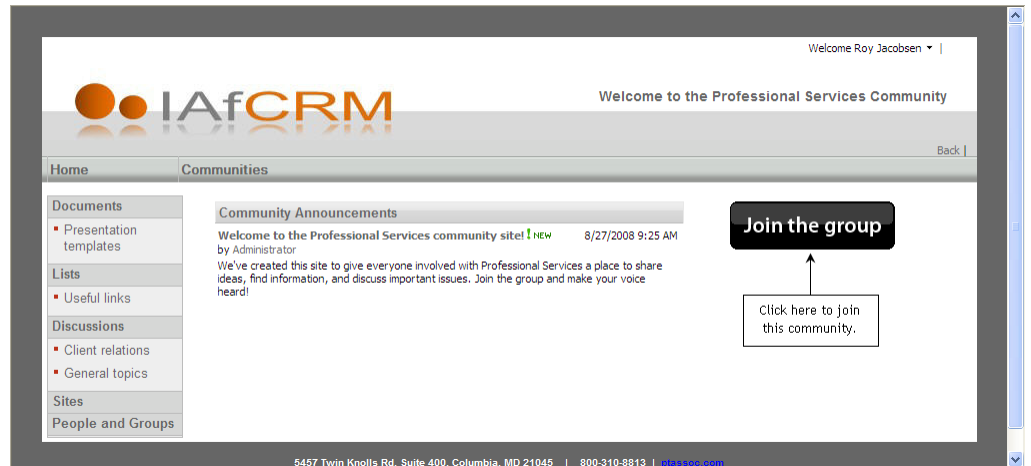
Communities sites

SharePoint for Members includes sites for the different types of communities—groups of individuals with common interests or characteristics—in your association. For example, your association can set up community sites for its committees, and every committee member will have access to the committee site.



Your access to most of these sites is controlled by whether you are a member of the community. For example, you can only access a committee's site if you are a member of the committee. However, your

association can also create sites for communities that you can choose to join.



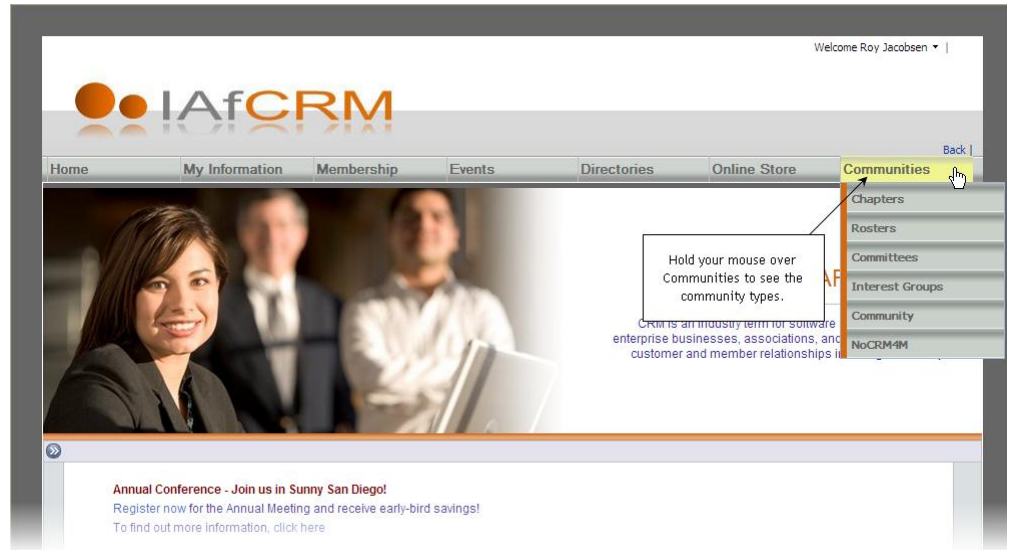
Joining an opt-in community

Your association can set up sites for ad-hoc, opt-in communities—groups that you can choose to join to leave at any time, and which are not based on your membership in a committee, roster, or chapter. These ad-hoc communities can be formed around political issues, professions, hobbies, or any other common interest.

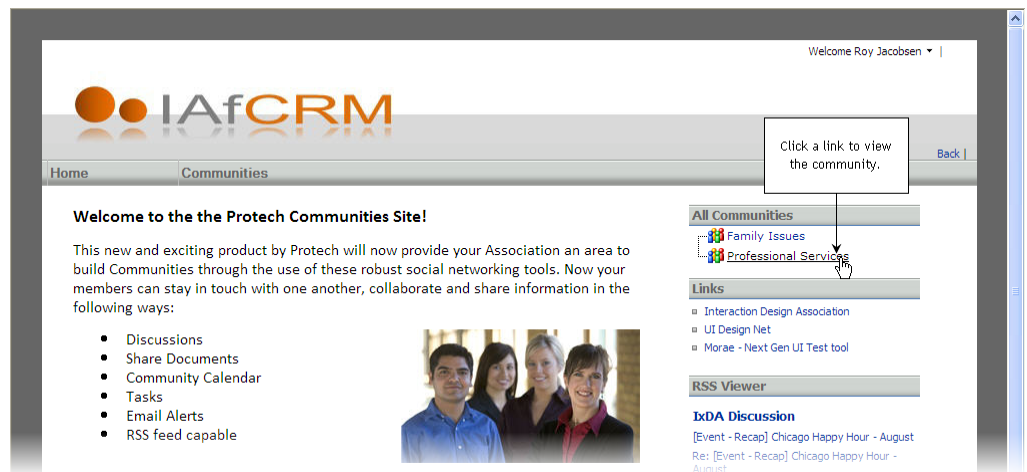
1. To view the available opt-in communities, log in to the SharePoint for Members site.
2. On the home page, hold your mouse pointer over the **Communities** menu. A list of community types will appear.

Note

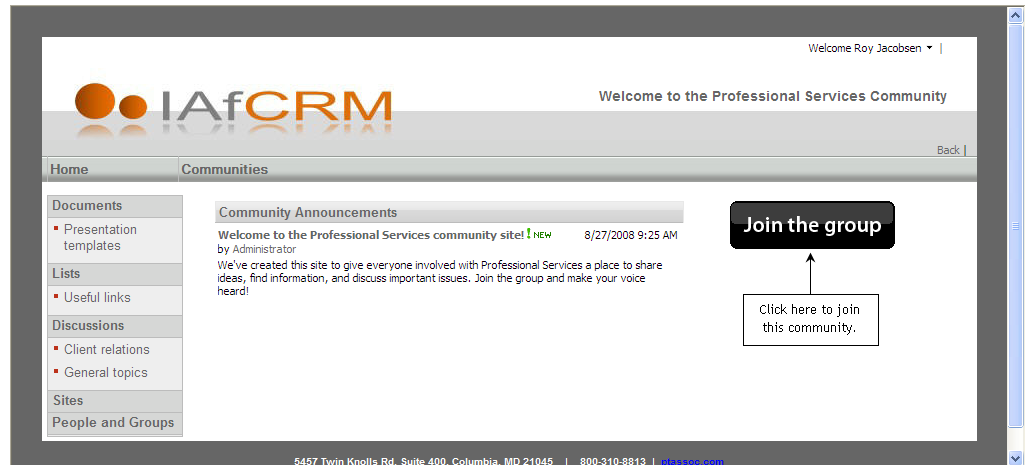
Your association's SharePoint for Members pages may appear different from the following illustrations.



3. Click the **Community** menu selection. The Communities site home page will appear.
4. Click a link in the **All Communities** list to view the community's home page.



5. In the community's home page, click **Join the group**.



6. You will automatically be added to the list of community members. You can leave the community at any time by clicking the **Unsubscribe** button on the community's home page.

Keeping track of changes

You can keep track of changes to the discussion boards, document libraries, and lists in the SharePoint for Members using two different methods: setting up alerts, or using RSS feeds.

Alerts

When you set up an alert, you will receive an email message whenever the content of the area changes. For example, if you set up an alert on one of the group discussion boards, you'll be notified whenever someone adds a new topic, or replies to a topic. You'll set up separate alerts for each discussion board, document library, or list that you want to monitor. You can remove an alert at any time. For more information, see *Set up an alert* on page 13.

RSS feeds

RSS (Really Simple Syndication) is a method used by some websites that allows users to “subscribe” to their content, making it easier to keep up with new and updated content. When you add an RSS feed to a feed reader, you no longer have to actually visit the website to see if there is any new content.

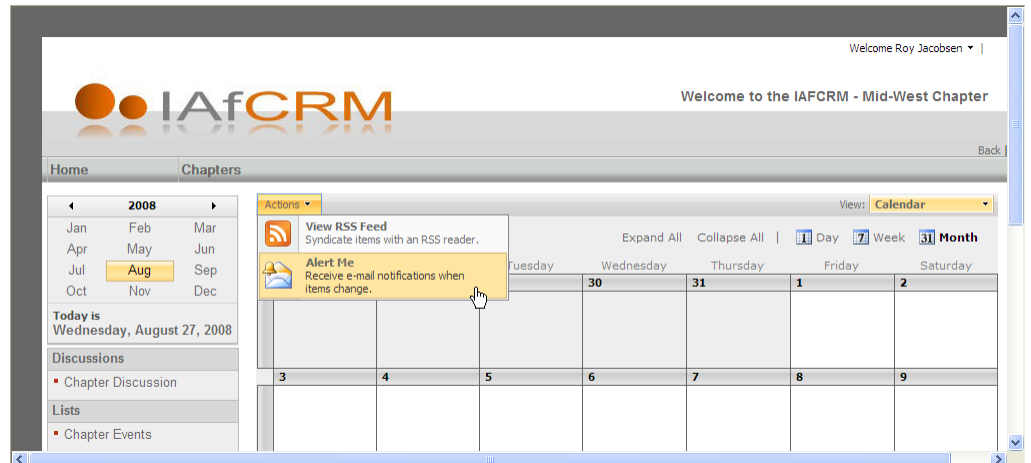
If you use an RSS feed reader, such as the feed reader built into Microsoft Internet Explorer 7.0, Microsoft Office Outlook 2007, or a web-based reader, such as Bloglines (www.bloglines.com) or Google Reader (<http://reader.google.com>), you can subscribe to feeds in any discussion board, document library, or list. For more information, see *Subscribe to an RSS feed* on page 14.

Set up an alert

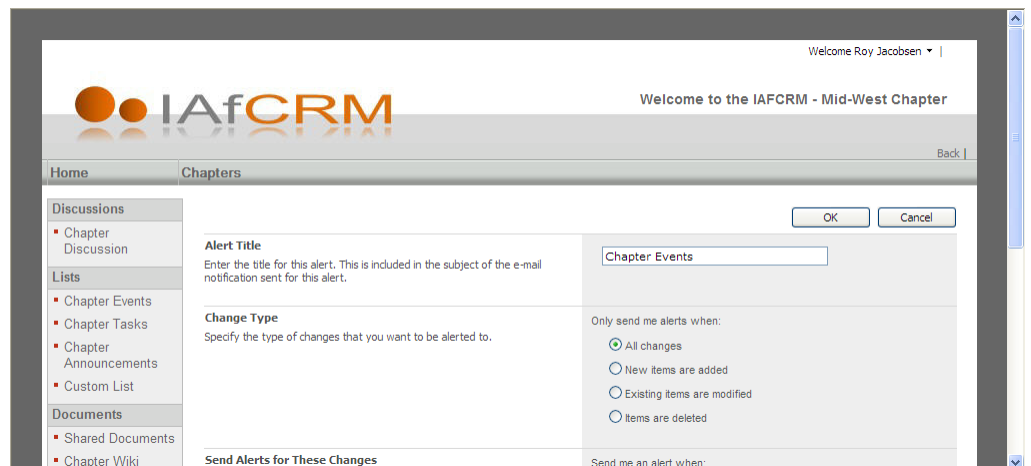
You can keep track of changes to the discussion boards, document libraries, and lists in the SharePoint for Members by setting up alerts. (You can also subscribe to RSS feeds if you prefer. For more information, see *Keeping track of changes* on page 12.)

When you set up an alert, you will receive an email message whenever the content of the area changes. For example, if you set up an alert on one of the group discussion boards, you'll be notified whenever someone adds a new topic, or replies to a topic. You'll set up separate alerts for each discussion board, document library, or list that you want to monitor. You can remove an alert at any time.

1. Go to the discussion board, document library, or list that you want to monitor.
2. Click **Actions**, then on the menu that appears, click **Alert Me**.



3. In the page that appears, enter a title for this alert.



4. Select the options to control when you want to be notified, and select the notification frequency.
5. Click **OK** to save your alert.

Subscribe to an RSS feed

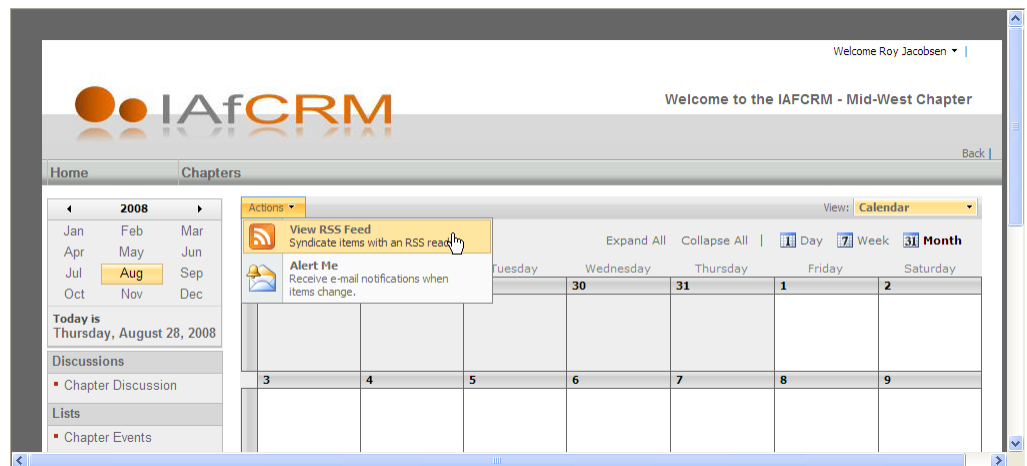
You can keep track of changes to the discussion boards, document libraries, and lists in the SharePoint for Members by subscribing to RSS feeds. (You can also set up an alert if you prefer. For more information, see *Set up an alert* on page 13.)

RSS (Really Simple Syndication) is a method used by some websites that allows users to “subscribe” to their content, making it easier to keep up with new and updated content. When you add an RSS feed to a feed reader, you no longer have to actually visit the website to see if there is any new content.

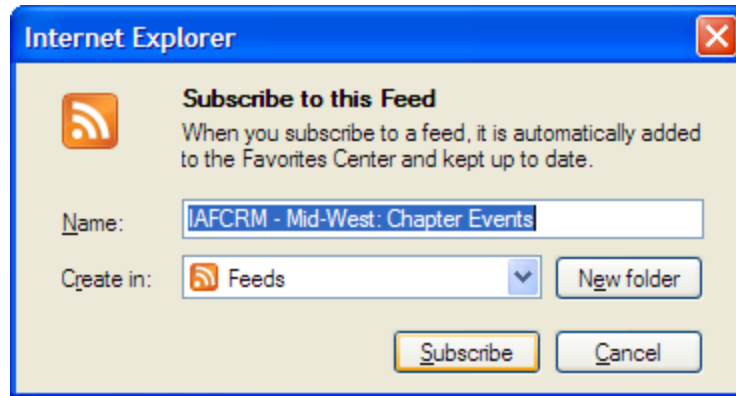
If you use an RSS feed reader, such as the feed reader built into Microsoft Internet Explorer 7.0, Microsoft Office Outlook 2007, or a web-based reader, such as Bloglines (www.bloglines.com) or Google Reader (http://reader.google.com), you can subscribe to feeds in any SharePoint for Members discussion board, document library, or list.

This procedure shows how to subscribe to one of the SharePoint for Members RSS feeds using Internet Explorer. If you use a different feed reader, you'll need to modify the steps to fit that application.

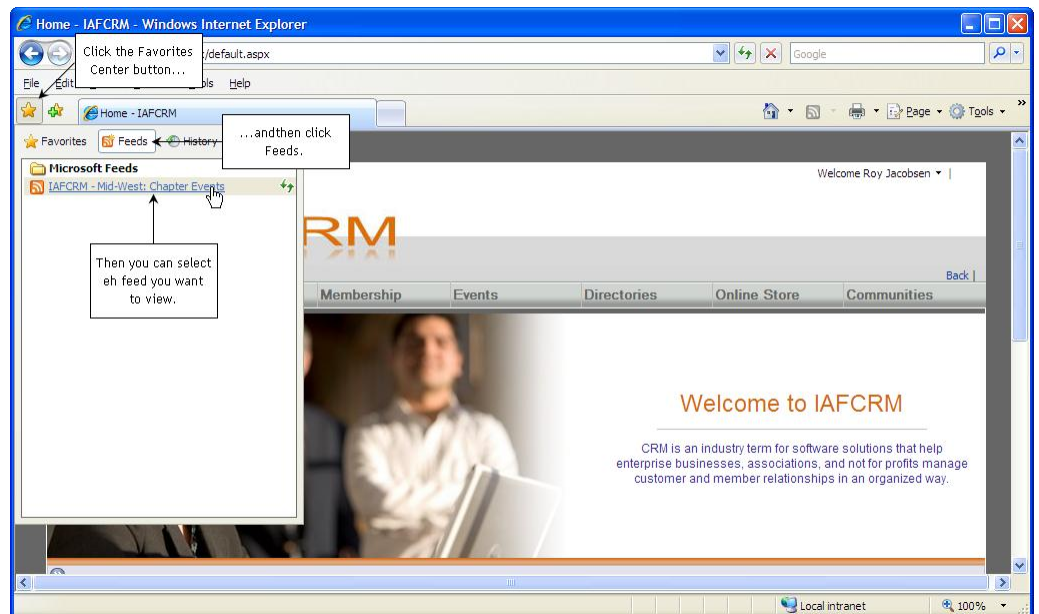
1. Go to the discussion board, document library, or list that you want to monitor.
2. Click **Actions**, then on the menu that appears, click **View RSS Feed**.



3. A preview of the feed will appear. Click **Subscribe to this feed**.
4. In the **Subscribe to this Feed** dialog, you can modify the name of the feed, and if necessary, choose a folder to save it in.



5. Click **Subscribe**.
6. To view your feeds in Internet Explorer, click the **Favorites Center** button, and then click **Feeds**. You can then select the feed you want to view.



7. If you are using Microsoft Office Outlook 2007, any feeds you add using this method will also appear in the list of RSS feeds in Outlook.

My CRM Dashboard

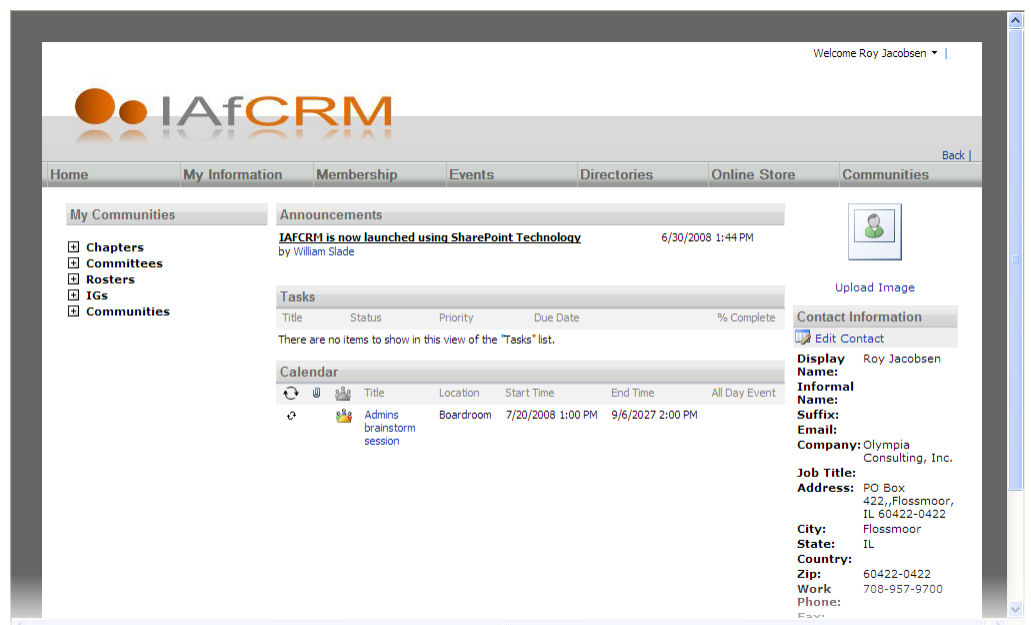
You can use the **CRM Dashboard** to view all of the group sites you have access to, as well as to view and update your contact information, and upload a picture of yourself.

You can open the **CRM Dashboard** from any SharePoint for Members page by clicking the **Welcome** link in the upper right corner, and then clicking **My CRM Dashboard**.

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The **My CRM Dashboard** page will appear. This page includes Web parts that show the sites and subsites that you have access to, your profile and picture (if you have uploaded one), and announcements, as well as any tasks assigned to you, and a list of calendar events.



Viewing your communities

Use the **My Communities** Web part to view the communities that you have access to. You can click any of the links in this Web part to open that community site.

The screenshot displays the IAFCRM SharePoint interface. At the top, the IAFCRM logo is visible. Below it is a navigation bar with tabs for Home, My Information, Membership, Events, Directories, and Online. The main content area is divided into several sections:

- My Communities:** A tree view showing categories like Chapters, Committees, Rosters, IGs, and Communities. Under Chapters, 'IAFCRM - Lake Wobegon' and 'IAFCRM - Mid-West' are listed with checkmarks. Under Committees, 'IAFCRM - Nuclear Energy Committee' is listed. Under Rosters, 'Health Care Exec' is listed. Under IGs, 'Communities' is listed with a plus sign, and 'Family Issues' is listed with a checkmark.
- Announcements:** A list of announcements, including one from 'IAFCRM by William' and another from 'rePoint Technology' dated 6/30/2008 1:44 PM.
- Tasks:** A table with columns for Title, Status, Priority, Due Date, and % Complete. A message states: 'There are no items to show in this view of the "Tasks" list.'
- Calendar:** A table with columns for Title, Location, Start Time, End Time, and All Day Event. One event is listed: 'Boardroom' on 7/20/2008 1:00 PM to 9/6/2007 2:00 PM.

Two callout boxes provide instructions:

- One points to the checkmarks next to 'IAFCRM - Lake Wobegon' and 'IAFCRM - Mid-West' with the text: 'Click a community link to open that site'.
- Another points to the plus sign next to 'Communities' with the text: 'Click the Plus button next to the group type to view the groups you have access to'.