



Getting Started User Guide

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

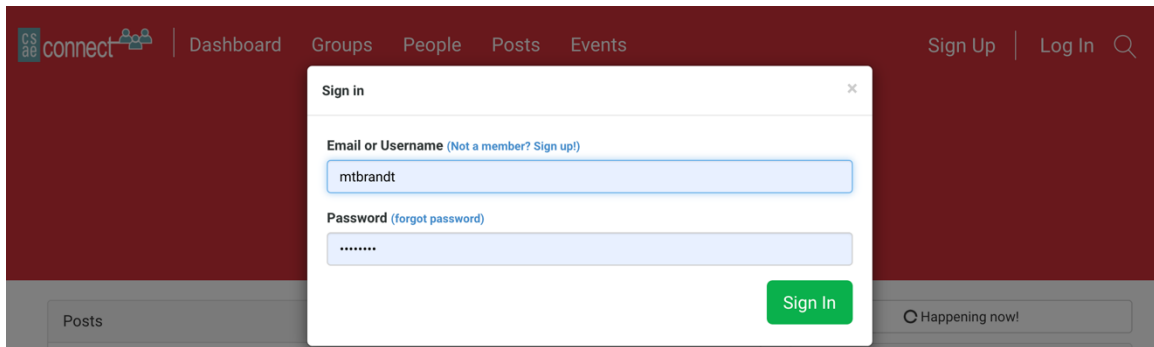
Table of Contents

Logging In.....	2
Dashboard.....	2
Articles	5
Import Articles.....	6
Profile.....	8
Notifications.....	9
Groups.....	10
In Portal Chat	11
Upload Files.....	13
Group Admin Functions	13
Glossary of Terms.....	19

Logging In

Login to your user portal website to access this online community:

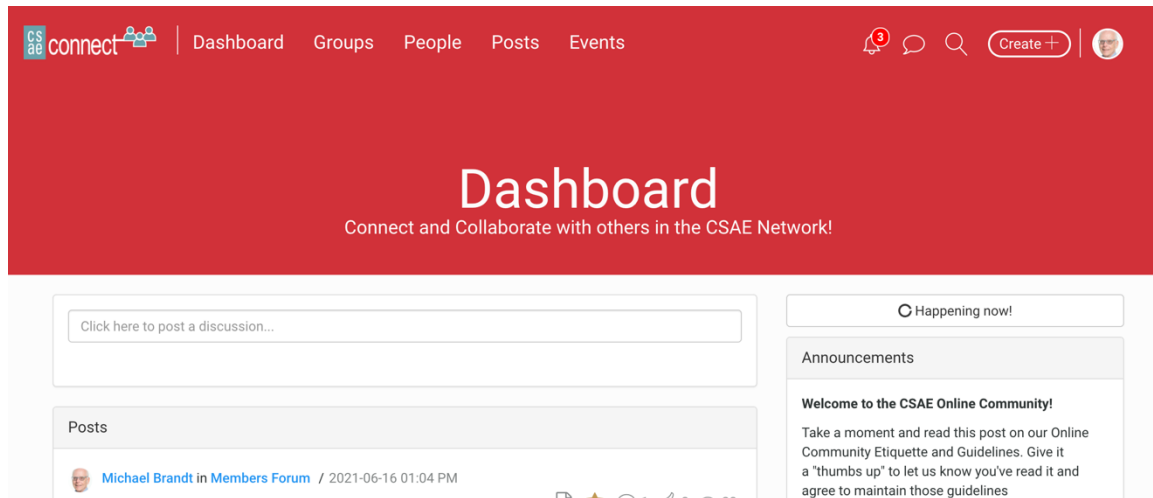
1. Enter your username and password.



The screenshot shows the CSAE Connect user portal. The header is dark red with the 'csae connect' logo on the left and navigation links 'Dashboard', 'Groups', 'People', 'Posts', and 'Events' in the center. On the right, there are links for 'Sign Up', 'Log In', and a search icon. A white 'Sign in' modal is centered on the screen. It contains two input fields: 'Email or Username (Not a member? Sign up!)' with the text 'mtbrandt' entered, and 'Password (forgot password)' with masked characters '.....'. A green 'Sign In' button is at the bottom right of the modal. Below the modal, a grey bar shows a 'Posts' section on the left and a 'Happening now!' section on the right.

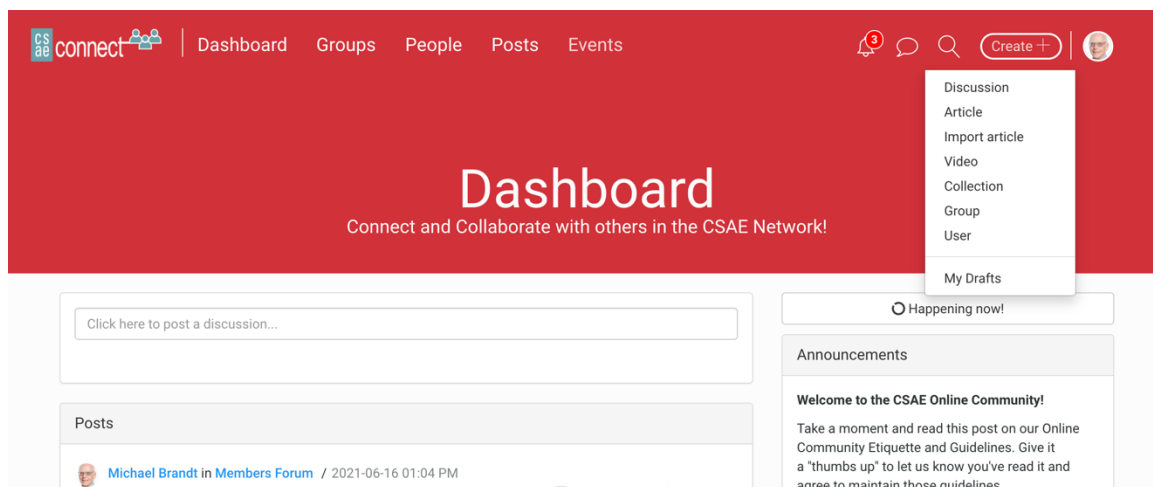
Dashboard

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.

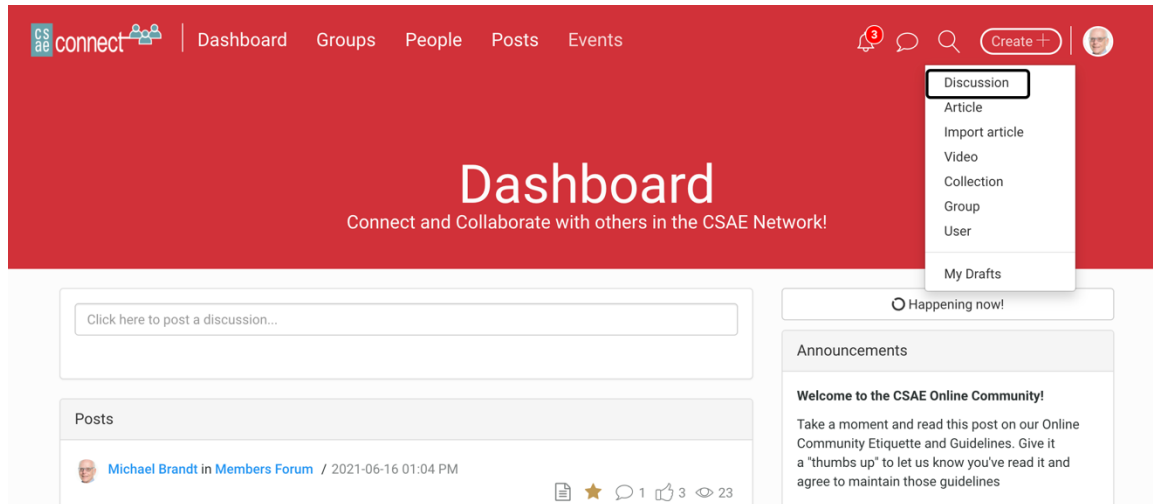
To immediately start adding content to the online community, click on the Create+ button. This will give the user the choices of content types the user can create.



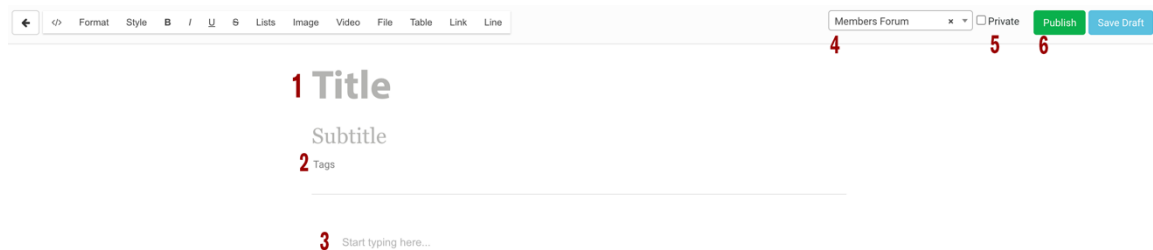
Discussions

To create a new discussion thread,

In the main top navigation, click on **Discussion** under the **Create +** button

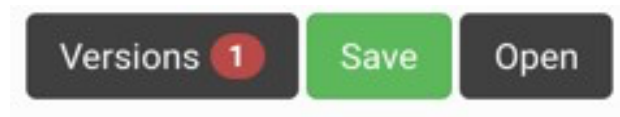


The discussion post is created on the following page:



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.

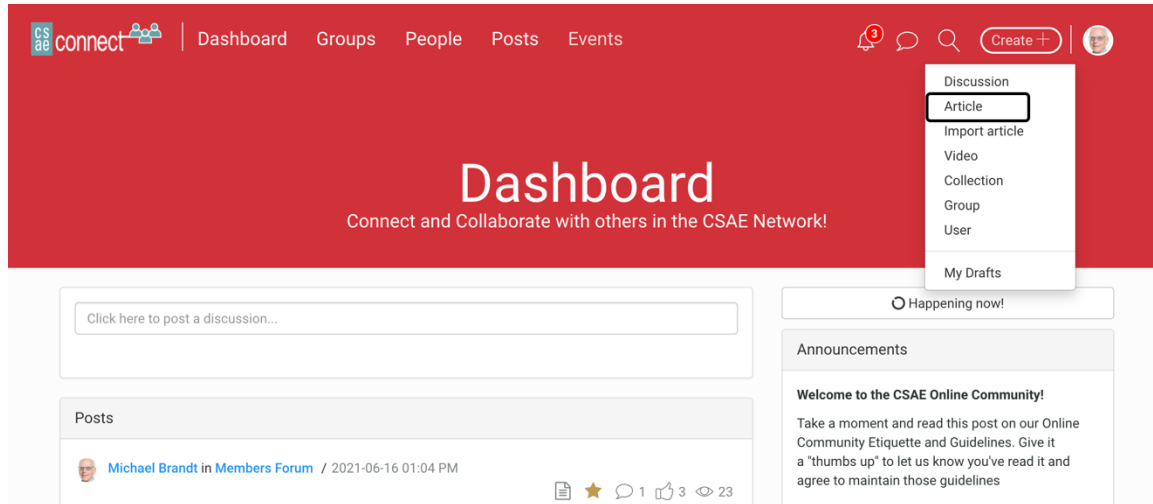
To view the new discussion, click on the Open button on the discussion creation page



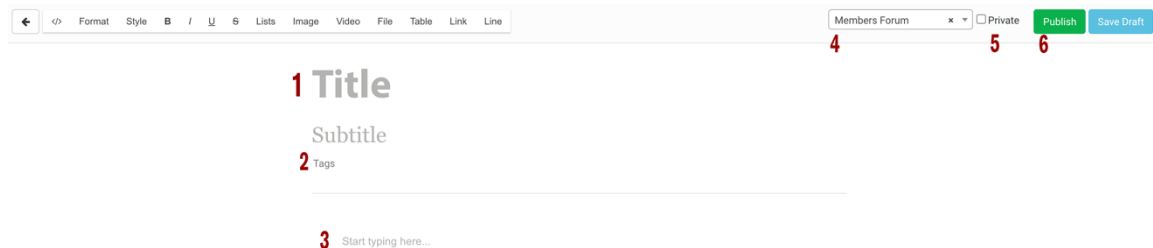
You can also view the new discussion listed on the homepage of group that it was posted. Click on the discussion to view the full discussion thread.

Articles

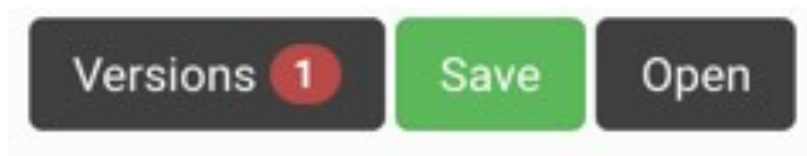
To create a new article, In the main top navigation, click on **Article** under the **Create +** button



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 “Enter” 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.
7. To view the article, click on the Open button on the article creation page

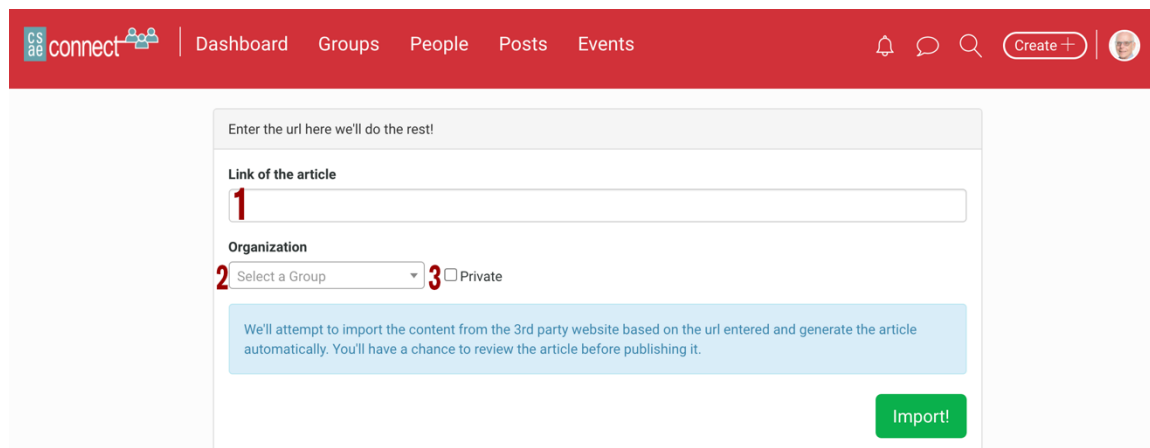
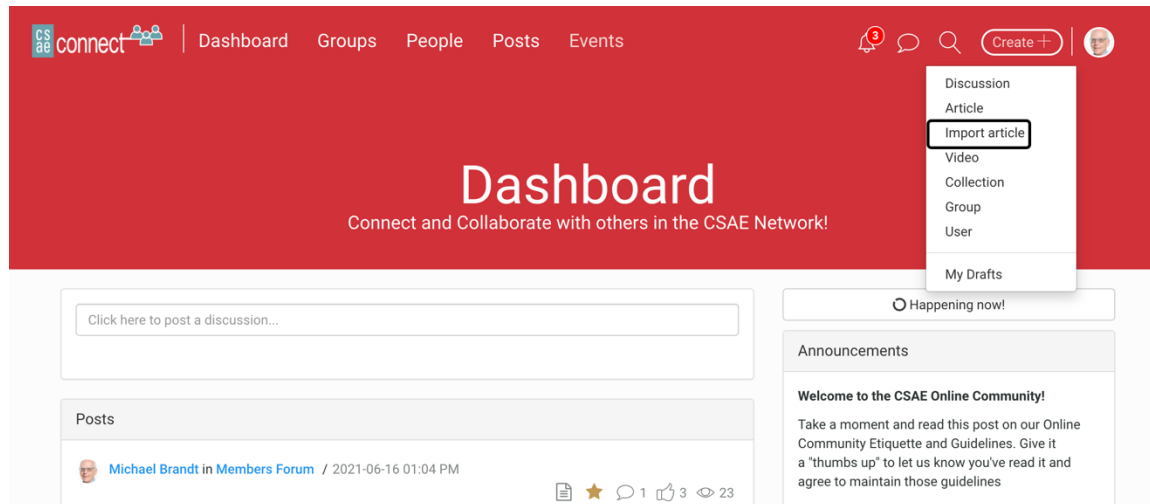


You can also view the new article listed on the homepage of the group that it was posted. Click on the article to view the full content of the article

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**

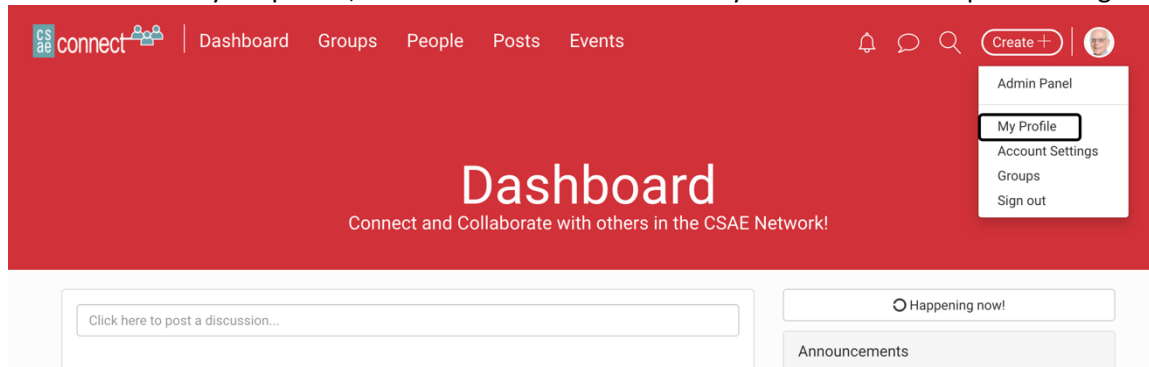


1. Copy the link of the webpage
2. Choose the group that the article will be posted to.
3. Click on the Private checkbox if you want the video to be only viewable to the group members (only applicable to public groups)
4. Click on the Import button to make the video live on the community
5. Please note: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

6. Upon import of the article into the group, the user can add tags

Profile

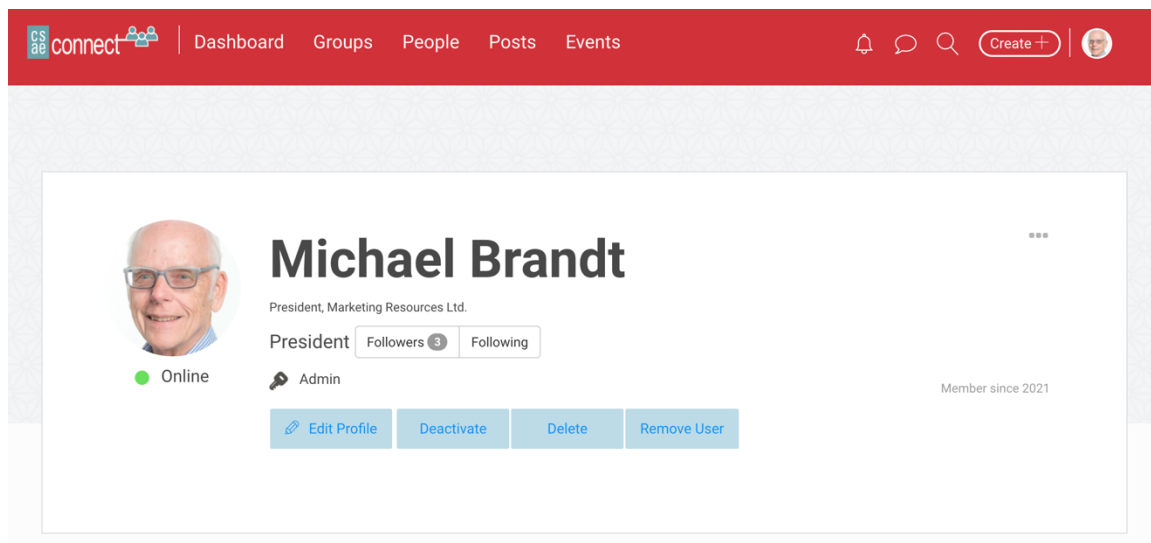
To view and edit your profile, click on the arrow icon next to your name in the top main navigation.



Click “My 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.

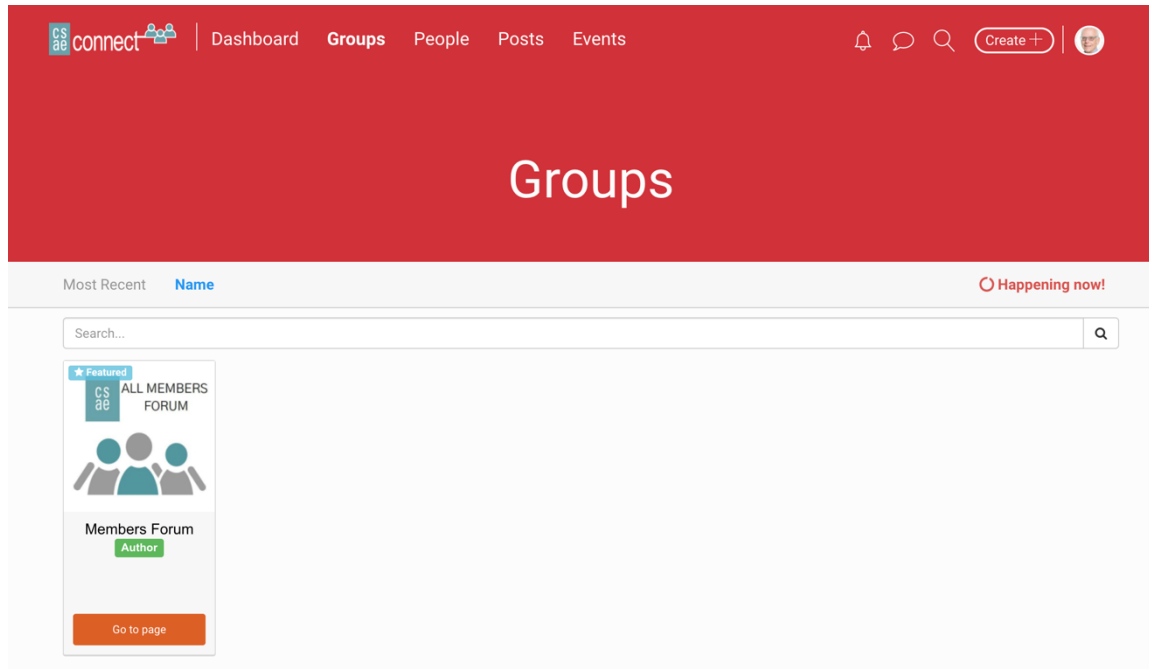
Click on **Save Changes** button to save any edit to the settings.

The screenshot shows the CSAE Connect user interface. At the top is a red navigation bar with the CSAE Connect logo, a menu (Dashboard, Groups, People, Posts, Events), notification and search icons, a 'Create +' button, and a user profile icon. Below the navigation bar, the 'Manage Notifications' page is displayed. On the left is a sidebar with a 'Back to Profile' button and a list of settings: Personal settings, Profile, Password, Notification (highlighted in blue), and Groups. The main content area is titled 'Manage Notifications' and contains three sections: 1. 'Email Digest' with a description 'Get a summary Email digest of everything that happens in your account.' and a 'Choose digest frequency' section with radio buttons for Weekly, Daily, and Hourly (selected). 2. 'As-it-happens' with a description 'Get email notification right away.' and an unselected radio button. 3. 'Turn off Email notifications' with a description 'You can always turn them back on later!' and an unselected radio button. Below these is a section titled 'Mention and messages notification settings' with a checked 'As-it-happens' radio button and a description 'Get mention and messages notification right away.' At the bottom of the settings area is an orange 'Save changes' button.

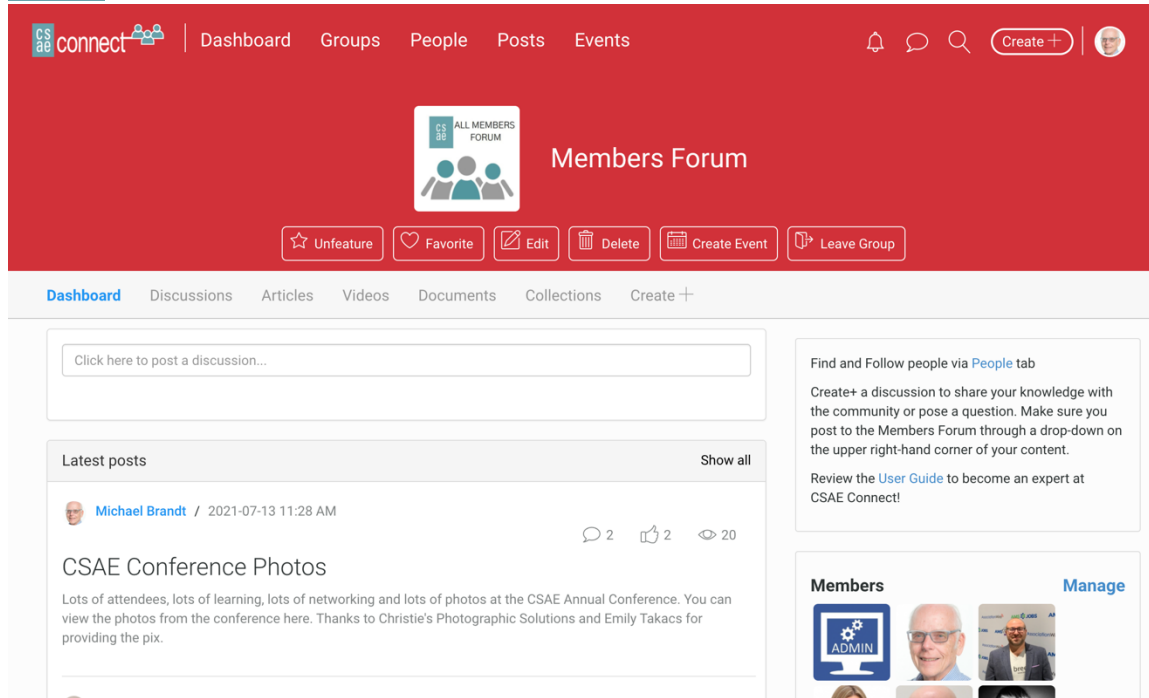
Groups

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



The following image is an example of a group:

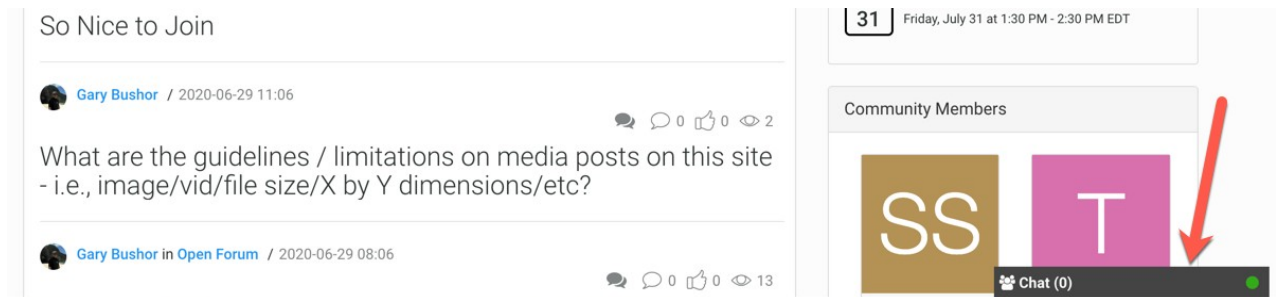


1. Select **Create +** in the workplace sub navigation. This will allow you to create content, similar to the Create + button in the main nav. The system will automatically auto-populate the workspace you are currently in.
2. Latest Posts displays all content created for this group from the group members
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 group **ch** 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.



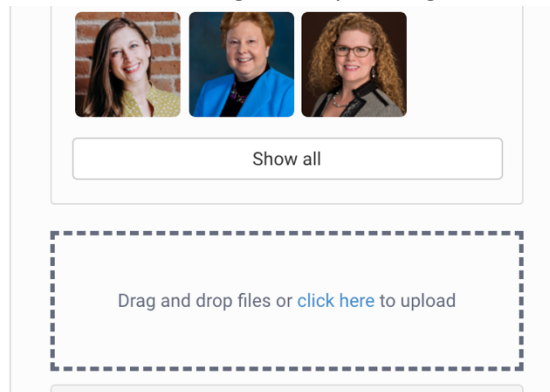
Each person on the list will have a status flag as well. Green represents they are online and active.

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 in. 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.

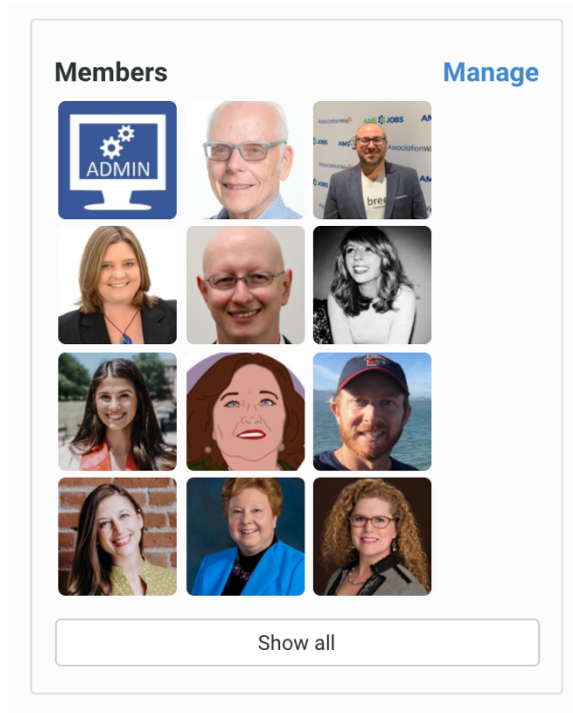
Please note: The system is capable of previewing PDF and image files but Word, Excel, PowerPoint documents are not viewable in portal. You must download the file to your computer to be able to view those file types.

Group Admin Functions

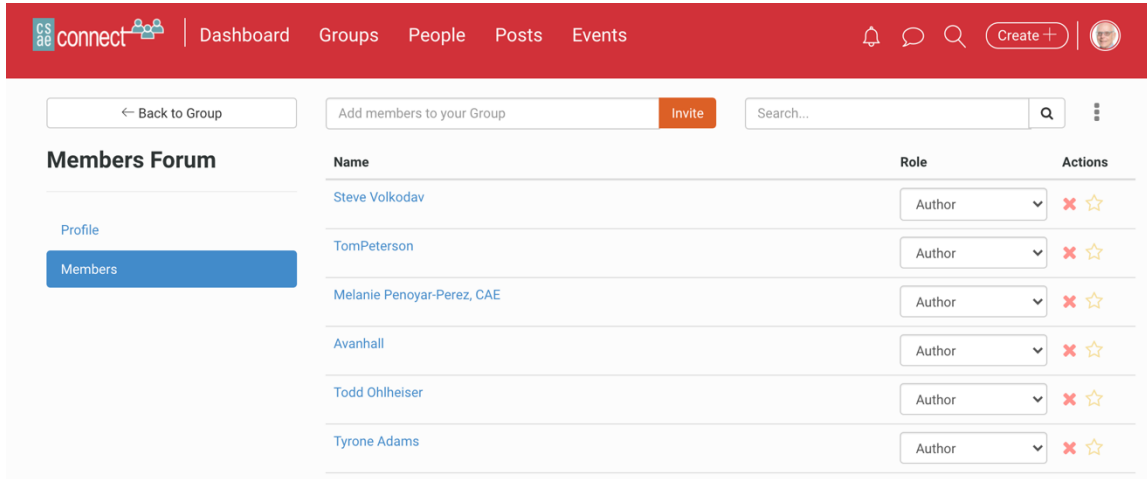
As a group administrator, there are additional functions available.

Managing users in the group

In the workspace, the **Manage** link will appear for group administrators.



Clicking on the **Manage** link will allow you to add to/remove users from your workspace, change user roles or feature users. Please note: you can only add users that are already part of the portal.



← Back to Group

Add members to your Group Invite Search...

Members Forum

Profile

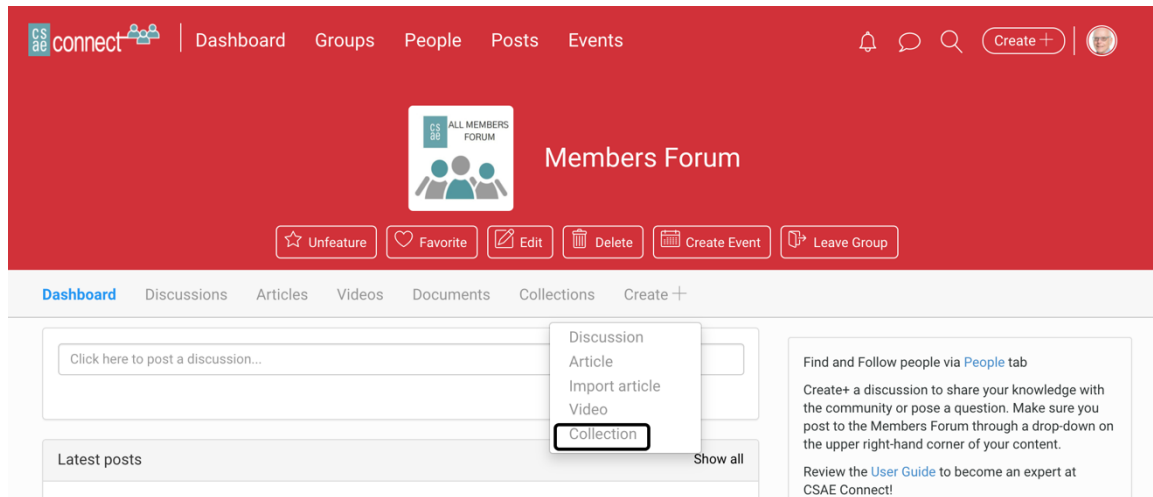
Members

Name	Role	Actions
Steve Volkodav	Author	✖ ★
TomPeterson	Author	✖ ★
Melanie Penoyar-Perez, CAE	Author	✖ ★
Avanhall	Author	✖ ★
Todd Ohlheiser	Author	✖ ★
Tyrone Adams	Author	✖ ★

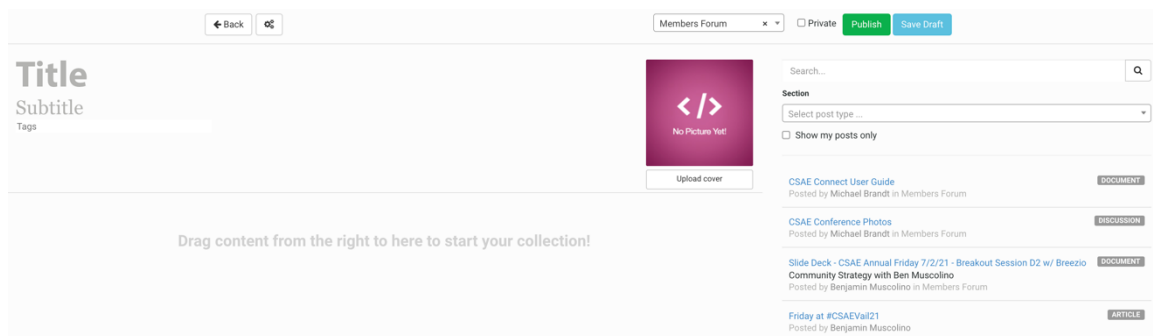
1. To add users, enter a user's first or last name in the field. The system will create a list of possible users from the community user database. Click on Invite to add the user to the group.
2. To delete users from the workspace, click on the **X** under the **Actions** column
3. To feature users so they appear first in the **Members** module in the workspace, click on the star icon.

Creating Collections

1. To create a project, go to the group and under the **Create+** menu in the subnav choose **Collection**
- 2.

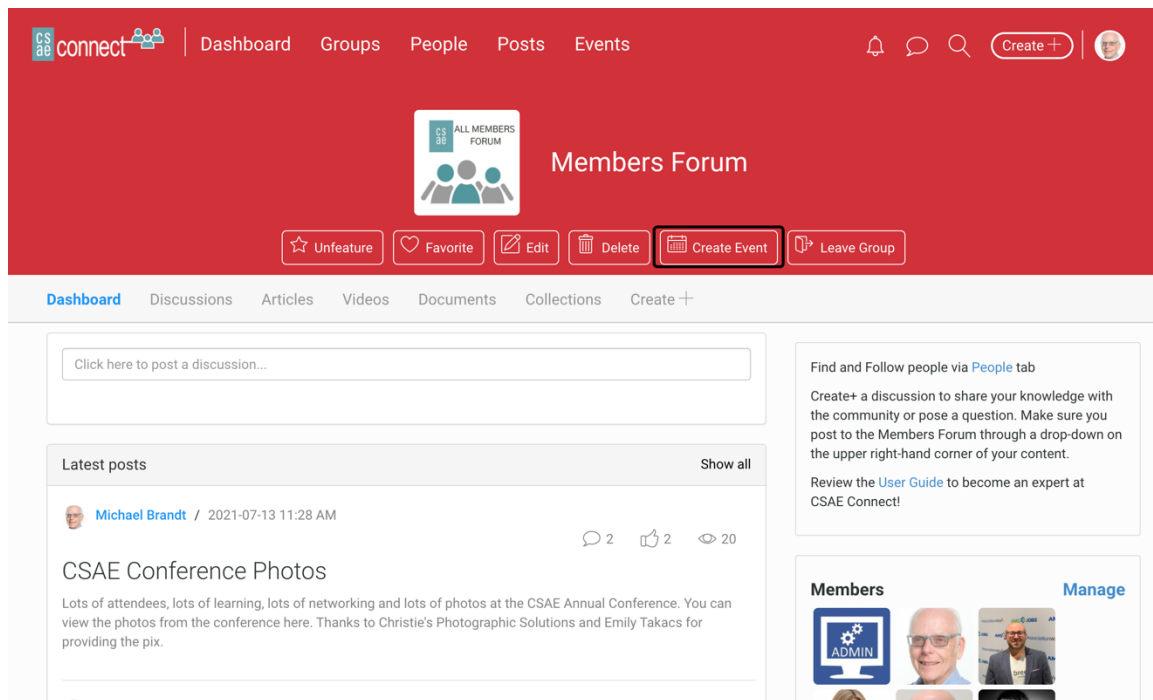


3. Name your Collection in the Title field
4. Add all the content by dragging and dropping content from the right menu to the left.
5. Click the **Private** checkbox if you only want the post to be visible in your group



Creating Events

In each group, only group administrators and portal admins have the ability to create events. To create an event, go to the home page of a group and click on the **Create Event** button:



Fill in the fields on the **Create an Event** page:

Create an Event - **Members Forum**

Subject Building Aspirational Board and Team Culture

Event Link https://members.csa.org/site_event_detail.cfm?pk_association_event=23071

Description Jeff Arnold and Rob Spangler will explore board governance concepts and the complex relationship challenges involved in building high performance teams and boards.

Type An external event (Make sure you mention the address or link in event description)

Start Date 08/05/2021 11:00 AM

End Date 08/05/2021 1:00 PM

Attendees ☐ Specific Users ☒ All members of Members Forum

Click on the **Create** button and the system will ask if invite notifications should be sent to all members. If yes, the invitees will receive an email notification to RSVP to the event. You can also choose to send the invitation to specific people in the group clicking on the **Specific Users** button

A summary of the event will be displayed after confirmation of the notification.

The screenshot shows the CSAE Connect interface. The top navigation bar is red with the CSAE Connect logo and links to Dashboard, Groups, People, Posts, and Events. On the right, there are icons for notifications, comments, search, a 'Create +' button, and a user profile. The main content area is titled 'Event Info' and includes an 'Add to Calendar' button. The event is scheduled for August 5th, titled 'Building Aspirational Board and Team Culture', and is marked as 'Attending'. The date is displayed in a calendar widget. Below the title, the date and time are shown: 'Thursday, August 5 at 11:00 AM - 1:00 PM'. A message states 'This is an external event. Click on the following button to join.' with a green 'Register!' button. The 'Description' section mentions Jeff Arnold and Rob Spangler discussing board governance. The 'Attendees' section lists 'All members of Members Forum'. A user profile for Michael Brandt is shown with an 'Attending' status and an 'Owner' dropdown menu. At the bottom, there are 'Go to Group', 'Edit', and 'Delete' buttons.

As the creator of the event, the user can edit or delete the event. If the event is edited or deleted, all invited attendees will receive a notification of the change.

Clicking on the **Go To group (lower left)** button will send the user to the group homepage where the event has been posted in the Upcoming Event section.

The event will now appear in the group's dashboard where the event was created

Users will be able to view the attendee list but only admin are allowed to remove attendees or change their roles

Glossary Of Terms

Activity: This is the generic term for any new creation of information in the community. Examples: new posts, new comments, event posts, editing of past posts, etc.

Article: Document or webpage used for collaboration.

Collection: Grouping of content arranged together on specific topic or narrative. Sometimes used as a repository for resources

Comment: Any additional opinion, observation or remark added to an existing post.

Dashboard: This is the homepage for users to enter their respective workspaces. This is the personal homepage for each user. It consists of workspaces, Announcements, and Things to Do.

- Announcements – Global messaging from the site administrator
- Things to Do – List of call-to-action items for users
- Workspaces - These are the group spaces to which users are subscribed.

Discussion: Content type created to begin a conversation. Generally, this would be text heavy.

Document: File of any type shared with the community. Note: the system can preview .pdf and image files but cannot preview .doc, .xls, or .ppt file types.

Chatting/Messaging:

In portal module that allows users to message one another directly. Currently, this module only allows one to one chat/messaging

Dashboard:

Notification: A communication from the system informing the user of activity in the community. There are two forms of notification: Email and in-portal.

Email: Based on the user's profile setting, the community sends an email to the user when activity occurs in the portal. The emails can be set to send immediately or in intervals (hourly, daily or weekly).

In-Portal: On the user's dashboard page at the top, there is a bell icon. Clicking on the icon will report all new activity that the user is allowed to see.

People: List of all members to whom a user is connected.

Post: Any type of content that has been added to the community (e.g., discussion, video, document, imported article, or comment).

Threads: Multiple comments originating from a single post or comment.