Internet Society 2011 Chapter Portal (AMS)
Overview including new features as of January 2012
Menu items

My Account drop-down allows access to YOUR personal data. From here you can update your profile (including language and date-format preferences), indicate interests, or subscribe to newsletters. All users will have this menu.

This block of text & link to Chapters page will encourage all members to join chapters – it appears to all ISOC Members after login.

Help/FAQ area for portal Q & A
Chapter Management menu

- Chapter Management shows you the Chapter(s) for which you are an officer. Clicking the chapter name leads directly to that chapter’s Roster page.

Click the name of the correct Chapter to access all management functions for that chapter. Officers who belong to only one chapter will be taken directly to Chapter Roster!
Updated Member Roster page
(all underlined columns are sortable)

- **NEW**: Search ability on Chapter Roster. Search uses "Contains" operator to find entries for any of the fields listed.
- **NEW!**: Deactivate button means one-click deactivation from your chapter. Deactivated members do NOT appear on Process Renewals.
- **Send Message** allows you to message your members (all or just individuals). Use in combination with Search to group members for targeted mailings.
- **Export button** allows export of entire Roster to .csv file.
- Click the ID number for each Member to see his/her Details page.
- Addition of City and State (US/Canada only) fields allow better demographic management by chapters.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>City</th>
<th>State</th>
<th>Country</th>
<th>Email</th>
<th>Join Date</th>
<th>Expiration Date</th>
<th>Deactivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MakkunEI</td>
<td>Kanazaki</td>
<td>Japan</td>
<td></td>
<td>Japan</td>
<td><a href="mailto:irkaan@yahoo.com">irkaan@yahoo.com</a></td>
<td>16/12/2010</td>
<td>26/01/2012</td>
<td>Deactivate</td>
</tr>
<tr>
<td>Munster</td>
<td></td>
<td>Japan</td>
<td></td>
<td></td>
<td><a href="mailto:munster@yahoo.com.TEST">munster@yahoo.com.TEST</a></td>
<td>16/09/2010</td>
<td>26/01/2012</td>
<td>Deactivate</td>
</tr>
<tr>
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<td>Reston</td>
<td></td>
<td>Mozambique</td>
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<td>18/04/2011</td>
<td>17/04/2012</td>
<td>Deactivate</td>
</tr>
<tr>
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<td>McNeY</td>
<td>Geneve</td>
<td></td>
<td>Switzerland</td>
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<td>05/07/2011</td>
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</tr>
<tr>
<td>46762</td>
<td>Anna</td>
<td>Lord</td>
<td></td>
<td></td>
<td><a href="mailto:lord@isoc.org">lord@isoc.org</a></td>
<td>21/12/2010</td>
<td>20/12/2011</td>
<td>Deactivate</td>
</tr>
</tbody>
</table>
Add Members page (part 1 of 2)
Use this page to manually add members, or upload via a .csv file (limit 50 members)

Country defaults to Chapter country, and Currency type to country default currency (may not be enabled for all chapters yet).

Dues amount shows information for tracking only – there will be no invoicing for chapter fees via the portal.

If adding a “legacy member,” you can now accurately indicate actual chapter-membership dates for your chapter.

Marking an added member as Active makes them appear on the Roster page as a member. Pending means (generally) that you are waiting for some dues or action from that member.
Add Members page (part 2 of 2)
Explanation of yellow highlighting

If the member you are adding already exists in AMS, you will see this yellow highlighting.

This is just for your information, and is normal. It just lets you know that changes to the person’s record can also affect other chapters.

Just click Continue to add the person to your chapter. It will not create a duplicate of the person or have any other negative effect.
Updated Review Applicants page
This page shows all potential members waiting for your approval. Potential members are not full members until you approve them.

- Start and End dates will default automatically to application date + one year, but these can be changed as needed.
- Once approved, the new Member will appear on the Roster page.
- Denied applicants will “disappear” from view, but the person can still apply again.

NEW: Search uses “contains” operator for queries on any of the fields listed. Also, all underlined columns are sortable.

Coming soon: Deny & Email feature allows you to both deny and send a templated explanation to denied members.

Details allows you to drill down into that person’s record.
Process Renewals page

This page allows you to review and then renew Members who may be expiring/have already expired. Emails indicating chapter-membership renewal will be sent automatically by AMS to the member.

Use drop-down menu to see different date ranges of members who need to be renewed. New text above displays total members needing renewal in all views.

Details button shows you the member's profile, for review before Renewal.

Email button allows you to launch a WSYWYG editor and email potential renewers.

Export will provide a .csv file containing all members displaying in the table view.
Chapter Officers page
Displays all current and past chapter officers. Also, any officers with Chapter AMS Admin role (can be granted to any officer) are able to add officers from the current Member Roster without needing to contact ISOC global. You can also extend or terminate an officer’s tenure using the Edit Role feature.
Member Self-signup
Profile Page (step 1 of 2)

Two-step wizard shows where users are in the process. Middle step was removed after feedback from users.

Email checked for basic validation. Passwords must match. Blank fields are not allowed, and JavaScript must be enabled.

By request, very few fields are required for new-member signup. All required fields are grouped together.
Member Self-Signup (2 of 2) – Chapters page

All users at this stage have been created as Internet Society Global Members and are now encouraged to join an ISOC chapter.

**NOTE:** New members will not be a Chapter Member until you approve them on Review Applicants page.

Users encouraged to join multiple chapters

However, users are prevented from joining more than four (4) chapters within a 24-hour period - this helps reduce “Spam member” applications.

NEW FEATURE: users can now see which chapters they have applied to, as well as those they are members of.

Users can still apply to new chapters (in this case Belgium Wallonia) even if they are already members of other chapters, and/or waiting to hear back on pending applications.
City/State page

(when applying for a chapter, City/State info is now requested for all Members that have not previously provided this info)

• This page appears as an “extra” for any Member applying for any chapter, if they have not yet specified a City in their preferred address.
• Any member who has already provided a City will NOT see this page.

City is requested for all members applying to all chapters – if they have not specified a city, all members will now see this page when applying to any chapter worldwide.

State field will only be requested for those members with addresses in the US or Canada. Since this member lives in Switzerland, he/she is only asked for City and State is greyed out.
These fields control how the chapter information displays in other areas of the AMS – on the Chapter webpage on isoc.org, but also in email confirmations from your chapter.

Web Presence is a new feature that allows your chapter to specify many URLs – such as social networking pages – along with the main chapter website.
Send us your feedback!

Send comments or suggestions to amshelp@isoc.org

Thanks!