# User Guide for Chapter Officers

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Introduction

This guide is intended for chapter officers to manage the details related to their chapter and their members.

Primary Functions:

- Edit chapter details (e.g. website address, email, etc.)
- Manage member applications and renewals
- Manage list of officers
- Add chapter elections
- Add chapter activities
- Apply for chapter grants
- Send emails to chapter members

The Chapter portal is supported in the following languages:

English, French, Spanish

Frequently Asked Questions

How can I access the Chapter portal?

- Go to the Internet Society website at: www.internetsociety.org
- Click on the "Member Login" link
- Enter your login name and password (note that this is the same username/password you use as a Member). This will redirect you to the Member Area dashboard.
- Within the section “My Chapters and Special Interest Groups (SIG)”, click on your Chapter name.
Note that you will now be within your chapter’s account (noted by the logo on the left menu). You will see the Chapter Officer dashboard, however you can still access your Member Area dashboard by clicking the titled tab.

**I forgot my username or password, how can I retrieve it?**

On the main Internet Society login page, click on the "Forgot Login?" link and enter your email address. You will be sent an email with instructions to reset your password. Note that you must use the password reset link within 1 hour, otherwise it will expire and you will have to repeat this process.

**Who can access Chapter functionality?**

- Only Chapter officers have the ability to update Chapter and member information. You must be defined as a current chapter officer.
- Only those with the Chapter AMS Administrator officer role have the ability to edit Chapter officers.

If you are a current Chapter officer but do not have access, it means you are not defined as an officer in the system. Please ask a Chapter AMS Administrator to add in order to receive the proper access.
Why do I need to renew members every year?

The bylaws of Internet Society members require Chapters to explicitly renew the memberships of their members every year or two depending on your chapter by-laws, unless agreements have been previously made for auto-renewals.

What if I notice an error in the translation?

Internet Society staff and the system administrators provided translations on a best effort basis. However, some phrases may have been missed or not translated properly.

Please report any translation errors to amshelp@isoc.org and specify which page you noticed the error and provide the correct translation.
The Primary Functions available to Chapter Officers include the following:

**Manage Chapter members**

- View and edit active member profiles
- Add new Global members to Chapter
- Send Email to all Chapter members

**Manage Chapter memberships**

- Approve pending applications
- Renew current memberships
- Terminate current or expired memberships

**Manage Chapter information**

- Edit Chapter profile
- Add Chapter activities
- Add Chapter elections
- View Chapter evaluations
Chapter Profile Overview

To view your Chapter profile:

- Dashboard -> Click on My Chapter Profile.

Sample Chapter Profile

The Chapter profile contains several tabs and sections to allow you to view all related information, although you are able to access certain parts directly through the dashboard:

Details tab

- Chapter/SIG contact info
- Web Presence
- Last election summary
- Chapter/SIG elections
- About Chapter/SIG – this is intended to be a public description of your chapter for future use.
- Charter Details
Preferences tab

- **Objectives of Interest**: Indicate the Internet Society objectives the Chapter is interested in.
- **Projects of Interest**: Indicate the 2020 projects the Chapter is interested in and how the Chapter feels they can best contribute.
- **Areas of Interest**: Indicate the topics the Chapter is interested in.
- **Areas of Expertise**: Indicate the Chapters Area of Expertise
- **Regions of Interest**: Indicate the Regions the Chapter is interest in.

Members tab

- **Active Members** - link to Active Members listing
- **Pending Applications** - link to Subscription page to view Pending Members
- **Not Active Subscriptions** - link to Subscription page with all member statuses except Active and Pending

Activities tab

- **Recent Activities (Last 365 days)** – List of most recent activities from the past year
- **Add Chapter/SIG Activity** – button link to add a new activity for your Chapter/SIG
- **Chapter/SIG Activities** – button link to view all activities for your Chapter/SIG beyond the past 365 days

Evaluations tab

- Last Evaluation Summary
- Chapter/SIG Evaluations History
- Chapter/SIG Activities

Grants tab

- Chapter/SIG Awards Eligibility
- Awards and Grants: Active Applications
- Awards and Grants: Application history
- Received Awards and Grants
- Available Chapter Funding Programs

You may not be able to edit all the information in your chapter profile as not all details are editable by Chapter officers (such as Chapter name).

Please notify the Internet Society Chapter Team to request such changes. Chapter-support@isoc.org
Chapter Actions

Action buttons on the Chapter Profile:
- Add Election (See pg 31)
- Add Activity (See pg 29)
- Edit Officers (see pg 26)
- View Pending Applications (See pg 17)
- Add New Global Member to Chapter

Note that these are alternative ways to access these functions through the chapter profile. Detailed functionality and instructions are provided further in this guide.

Add New Global Member to Chapter

This action will allow you to add a new global member to your Chapter/SIG. If the member is already in the database, you will be notified by the system and you can then add them to your Chapter/SIG.

Select Add New Global Member to Chapter action button from Chapter/SIG profile

Or
On Chapter Officer Dashboard, select Add a member button under Chapter/SIG Membership dashlet

Within the Pending member applications and Active members link, Select Add Member

Action button to add a member to Chapter/SIG:
- Action button will redirect you to the Add New Global Member to Chapter/SIG form

Sample Add New Global Member to Chapter/SIG form
- Fill in the **Required** fields:
  - First/Given Name
  - Last/Family Name
  - Primary Email Address
  - City
  - Country
  - Add as a Global Member *(Note – as default this is checked as the Individual must be a Global member to join a Chapter/SIG)*

- Select **Chapter Subscription Status** of Pending or Active from drop down
  - Active: Individual will immediately be added as a Chapter member.
  - Pending: Individual will immediately be added in a pending state for Chapter membership. You may activate Chapter membership at a later date on the Pending Applications screen.

- **Click Add New Member**
- You will be redirected to the users profile. (They will need to confirm their email address from communication sent when added to database)
- You can return to the Dashboard by clicking the ‘Go back’ button or selecting the drop down by Home on the left hand panel and select **Dashboards**
If the individual is already in the system, a screen will display that “Email address found in the system!” From there, you can proceed to add them to the chapter by selecting Add Person to Chapter/SIG.

Add Existing Person to Chapter
Chapter Members

View Members

From the Chapter Officers Dashboard, click on the View Members link to see the list of all active Members.

To find a person, search by the various filters available at the top of the screen, then click the Search button. To view their profile, click on either their name or the View button.
You can search members by:

- First Name
- Last Name
- Email Address
- Country
- State/Province
- City
- Subscription Status
- Member Id
- Opt-Out — [This is to note if a member had opted in or opted out of receiving Email.]
- Phone number

Note that entering multiple search criteria will combine those filters as “AND” rather than “OR”, meaning that the results would have to satisfy all parameters in order to display.

The listing contains the following information:

- Member name
- Email Address
- City, County
- Member Id
- Subscription start and end date
- Status
- Opt-In or Opt-out label

**Member Profile**

There are several ways to navigate to a member’s profile.

**From the Chapter Officer Dashboard**
- Click on the Active Members or Pending member applications link to be redirected to the list of all active members or pending members.
- Click on View button on the right of each record or click on the name of the member

**From the Member Dashboard (to access your own profile)**
- Click on the Member Area tab on the Dashboard
- Click on the Edit My Profile button

**From the top right of the screen (to access your own profile)**
- Click on the profile picture icon on the top right of your screen to open a dropdown
- Click on Profile

**From the Subscriptions page**
- Click on the Manage Subscriptions link from the Chapter Officer dashboard.
• Click on the name of the member to view their profile

Sample member profile

The member profile has the following tabs and sections:

Details

- **Contact Information**: Name, email address, physical address, preferred phone, and mobile phone.
- **Personal Information**: Title, suffix, gender, and preferred language.
- **Organization**: Organization Name, Job Title and Website.
- **Social Profiles**: Skype ID, Facebook, Twitter, LinkedIn, blog and other social links.

Preferences

- **Email Consent and General Channels** — control your universal optin/opt-out as well as tailor preferences to different email lists.
- **Objectives of Interest**: Indicate the Internet Society objectives the member is interested in.
- **Projects of Interest**: Indicate the 2020 projects the member is interested in and how they feel they can best contribute.
- **Areas of Interest**: Indicate the topics the member is interested in.
- **Areas of Expertise**: Indicate the members Area of Expertise
- **Regions of Interest**: Indicate the Regions the members is interest in.
Participations

- **My Events**: Indicates events the member has registered for. These would only reflect ISOC-hosted events.
- **Officer history**: View this member’s past and current terms served as any officer position.
- **My Donations**: A member’s donations history
- **My Fellowships**: A member’s Fellowship history
Chapter Subscriptions [Update as of 7-30-2020]

Viewing all your member subscriptions

Subscriptions refer to the person’s membership to the chapter, and can contain several statuses.

To view all subscriptions, click on the Manage Subscriptions links on the Chapter Officer dashboard.
Subscriptions

All subscriptions can be filtered by:

- **Starts On date**: Filter by Date Range
- **Ends On date**: Filter by Date Range
- **Members**: Search by members name or email address. For an exact match, search with email address.
- **Status**

Only the following statuses are used for managing chapter subscriptions:

- **Active**: Indicates an active member.
- **Active (Canceled) [Formerly labeled Canceled]**: Indicates a member who has requested that their chapter membership be canceled but is still considered an active member of the chapter until the end of their term date has passed.
- **Active (Grace) [Formerly labeled Suspended]**: Indicates a member whose active membership has passed its term end date and needs to be renewed.
- **Declined**: Indicates a member that had applied to your chapter but was declined.
- **Expired**: Indicates a member whose active membership has passed its Grace Period without ever being renewed.
- **Pending**: Indicates a member that has applied to be a member of your chapter, but not yet approved or declined (ie, requires action).
- **Terminated**: Indicates a member that either left or was removed from your chapter prior to their subscription term end date. *(If this member needs to be recovered back to Active, please contact your Community Engagement Manager directly or the Chapter Support Team at chapter-support@isoc.org)*
Accepting or declining new member applications

When a Global member applies to join your chapter, they will receive a confirmation that their application has been sent for review by the Chapter officers. In addition, all Chapter officers receive a notification of this new application.

To review this Global member application:

- Login to your Chapter Officer Dashboard
- Click on the **Pending member applications** link within the “Notifications (Action Needed)” panel
- You will see a list of all pending applications with the most recent at the top. To view any member’s profile, click on their name. Click on your browser’s back button to return to the list of subscriptions.
- To accept this member into your chapter, click on the dropdown arrow to the right of the row, then select **Approve**. To decline this member, select **Decline**.

To approve or decline multiple applications at a time:

- From the **Manage Subscriptions** link on the dashboard, select only the Pending members checkbox and Update Results.
- You will see a list of all pending applications with the most recent at the top. To view any member’s profile, click on their name. Click on your browser’s back button to return to the list of subscriptions.
- Click on the select All checkbox to select the Current page of members. To select all persons from each page, select the drop down by the checkbox and you will see two options
  - Select current page
  - Select all records
• Once selected, click on the **Bulk Actions** button located above the list of subscriptions, then select either **Approve** or **Decline**.

- A notification will then display to confirm this action, and those records that will be affected, by typing in the confirmation text into the textbox.

- **Click Ok**

**Start and End Dates:**

The start date of a member’s subscription is the day that they applied to your chapter. The end date is one year from the start date. This remains the same even if you approve them after several days or weeks from when they applied. Subscriptions to chapters are always one year in length.

**Email Confirmation:**

Once you have approved a member (using either of the two methods above), they will receive an approval email. **If you would like a customized email, please reach out to your Community Engagement Manager directly or the Chapter Support Team at chapter-support@isoc.org.**
Note that no email is sent to the member if you decline their application, however they will be able to see this status within the Membership tab of their member profile.

Renewing (Extending) members

Extending a member’s subscription to the Chapter can be done within the same Subscriptions screen.

To extend a member’s subscription to your Chapter:

- Login to your Chapter Officer Dashboard
- Click on the **Extend Members** link

You will see a list of all members whose subscriptions have suspended, that is, whose end dates are in the past.
- To renew their subscription, click on the dropdown arrow to the right of the row, then select **Extend (Current Term)**.
To extend multiple subscriptions at a time:

- From the **Extend Members** link on the dashboard, you will see a list of all members whose subscriptions have entered their Grace period, that is, whose term end dates are in the past.
- Click on the select All checkbox to select the Current page of members. To select all persons from each page, select the drop down by the checkbox and you will see two options
  - Select current page
  - Select all records
- Once selected, click on the **Bulk Actions** button located above the list of subscriptions, then select the **Extend (Current Term)** action.

A notification will then display to confirm this action, and those records that will be affected, by typing in the confirmation text into the textbox.

- **Click Ok**

Please note that you will be able to extend the membership term for members 90 days prior to their renewal date.
Terminating members

The use for Terminating a chapter members is for members that need to be removed from the chapter prior to their subscription term end date.

To terminate a members subscription to your chapter, you will use the **Terminate** action. Note that this does not terminate their Global membership with the Internet Society – only their subscription to your chapter. You may need to update the Status filters to show additional members in the list.

**To Terminate a member’s subscription**

- Login to your Chapter Officer Dashboard
- Click on the **Manage Subscriptions** link

You will see a list of all members, and you will need to update the search results for the specific member you need to have their subscription end.

To Terminate, click on the dropdown arrow to the right of the row, then select **Terminate**.
To Recover a formerly-Terminated member

In the former system, it was possible for Officers to continue their functions even if their base chapter membership had lapsed. In MemberNova, every officer must also be a current member of their chapter(s). Therefore if your membership is listed as Terminated, you will want to contact your Community Engagement Manager directly or Chapter Support Team at chapter-support@isoc.org.

Cancelling members

The use for Cancelling a chapter members is for members who request to cancel their chapter members but still be considered an active member of the chapter until the end of their term date has passed. Then they will be listed as Expired.

To cancel a members subscription to your chapter, you will use the **Cancel** action. Note that this *does not Cancel their Global membership with the Internet Society* – only their subscription to your chapter. You may need to update the Status filters to show additional members in the list.

To Cancel a member’s subscription

- Login to your Chapter Officer Dashboard
- Click on the **Manage Subscriptions** link
• You will see a list of all members, and you will need to update the search results for the specific member you need to have their subscription end.
• To Cancel, click on the dropdown arrow to the right of the row, then select Cancel.

![Image of Subscriptions page]

• After you select Cancel, a popup will display that provides explanation that the “subscription will remain active until the current term end date”.
• Here you may provide a Cancellation Comment and Cancellation Reason. These are not required, but optional.

![Image of Confirm Cancellation]

• Click Save

To Reactive a formerly Cancelled member

• Login to your Chapter Officer Dashboard
• Click on the Manage Subscriptions link
• You will see a list of all members, and you will need to update the Status to display only Active (Cancelled) members.
• To Reactivate, click on the dropdown arrow to the right of the row, then select Reactivate (Undo Cancellation).

To Reactivate multiple subscriptions at a time:

• Login to your Chapter Officer Dashboard
• Click on the Manage Subscriptions link
• You will see a list of all members, and you will need to update the update the Status to display only Active (Cancelled) members.
• Click on the select All checkbox to select the Current page of members. To select all persons from each page, select the drop down by the checkbox and you will see two options
  o Select current page
  o Select all records
• Once selected, click on the Bulk Actions button located above the list of subscriptions, then select the Reactivate (Undo Cancellation) action.
• A notification will then display to confirm this action, and those records that will be affected, by typing in the confirmation text into the textbox.

![Confirm Reactivation dialog box](image)

• **Click Ok**

Please note that the Cancellation Comment, Cancellation Reason, and Cancellation Date information will live within the Subscriptions Record.
Chapter Officers

There are two ways to view and manage officers to your Chapter/SIG:

- Click on the **Chapter Officers** menu item under Home within the left navigation menu, or
- Click on the **Manage Chapter Officers** button within the Officers dashlet on your dashboard

**Note on Access Roles**: You require the **Chapter AMS Administrator** role in order to be able to edit the Chapter Officer list. This role can be granted to multiple members, by assigning them that position within the list. If you do not have access to editing Chapter Officers, please ask any one of your current Chapter AMS Administrators to add you.

**Editing your Chapter Officers**

- Within the actions column, click on the drop down on the position you wish to edit
- Click the Edit button in this dropdown
You can edit any of the fields available: Position, Member Name, From and To date.

Note that to edit the member name, delete the existing name and begin typing either the first name, last name, or email address of the new person. If the system finds this person within your chapter, you will see the results visible within a dropdown. Select the name you wish to assign to this position.

Click on Save

Filter Officers by Status

On the Officers list, you can filter and view by officers by selecting either past, current or future. This is based on the start and end dates of each position. To do so, simply click on the drop down next to the search field at the top of the page, and select one of the options. The screen will refresh to show only positions matching that criteria.
Adding a new Chapter Officer

If you need to add a new position to your list, you can do so within the Chapter Officers screen.

Click on the **Chapter Officers** menu item under Home within the left navigation menu, or

Click on the **Manage Chapter Officers** button within the Officers dashlet on your dashboard

- Click on the Add button at the top right of the screen

![Chapter Officers screen]

- Select the Position, Member Name, and update the From and To date of this position’s term.
- Click on Save

**Chapter Officer Access Roles:** Adding a member to a Chapter Officer position will automatically grant them the Chapter Officer role, which enables them to access the Chapter Officer dashboard when they click on their Chapter name upon login. This will allow them to update all available options on this dashboard with the exception of the Chapter Officers list.

**Viewing current and past officer listings:** The Chapter Officer dashboard displays a list of current officers. For any member that has held a chapter officer role in the past, this appears within the Participations tab of their member profile.

Please note that position titles are defined by the Internet Society and are not customizable for Chapters. Please reach out to the Chapter Support team at chapter-support@isoc.org with any questions.
Chapter Activities

Adding a Chapter Activity

To add a new chapter activity:

- Login to the Chapter Officer dashboard
- Click on the Add Chapter Activity button under the panel titled as your Chapter’s name
- You will be redirected to the Add Chapter Activity form, where you will be able to input additional details.

You can also add an activity from your Chapter’s profile:

- Click on the My Chapter Profile link on the dashboard
- Click on the Activities tab
- Here, you will see a list of previously submitted activities
- Click on the Add Chapter/SIG Activity button
- You will be redirected to the Activity form, where you will be able to input additional details.

OR:

- Click on the Add Activity button on the top right of the profile (Click on the drop down button to view all actions available)

Required Fields

- Chapter (Filled in automatically from Chapter Portal)
- Activity Name
- Activity Date
- Purpose of the Activity

Optional Fields

- Activity Type
- Image
- Number of Participants
- URL/Social Media links
- Location (Address, City, Country, State/Province, Zip/Postal)
- Do you need additional information of support from ISOC staff for this activity?
- What are the next steps in terms of follow-up on this activity?
- Projects

Your newly submitted activity details will appear under the Activities tab of your Chapter profile. Your Regional Chapter Manager will review your listed activities to deem which are mission related. This will be used during Chapter evaluations to determine your chapter’s funding eligibility for the next Chapter Admin funding Grant period.
Types of Activities

When reporting Chapter activities, you will be able to define activities as:

- Conference
- Workshop
- Seminar
- Webinar
- Submission of Papers
- General Assembly
- Other Activity

The Add an Activity form
Chapter Elections

Adding Chapter Elections

To add details about a Chapter election:

From the Dashboard:

- Click on the Add Chapter Election button under the panel titled as your Chapter’s name
- You will be redirected to the Election form, where you will be able to input additional details.
- **Note** that an election supporting document is a mandatory field.

From your Chapter Profile:

- Click on the “My Chapter Profile” link on the dashboard
- Within the Details tab, scroll down to the panel titled Chapter/SIG Elections.
• Here, you will see a list of previously submitted elections
• Click on the Add Chapter/SIG Election button
• You will be redirected to the Add Chapter Election form, where you will be able to input additional details

OR:

• Click on the Add Election button on the top right of the profile

**Required Fields**
• Chapter (Filled in automatically from Chapter Portal)
• Election Date
• Election Supporting Document

**Optional Fields**
• Number of Participants
• Chapter Election Format
• Location (Address Line, City, Country, State/Province, Zip/Postal)
• URL/Social media links

Your newly submitted election details will appear under the Details tab of your Chapter profile. Your Community Engagement Manager will review your election details to deem if it should be certified. Once reviewed and certified, the Last Election Summary panel on your Chapter profile will be updated automatically to reflect the last election date and next. Should the details here not be correct, contact your Community Engagement Manager or reach out to the Chapter Support team at chapter-support@isoc.org.
Communication

You have the capability to send an email to all active members of your chapter. This will automatically filter out members who opted out of emails or did not provide GDPR consent.

Sending an email to individual chapter members

CUnder the “Notifications (Action Needed)” panel, Click on either the Pending member applications link to email Pending members, the Active members link to email members through the search list.

To email a single member directly:

- Within the search list, search for a user with the provided filters.
- Click on the drop down menu to the right of the user and select Email Member.
To multiple members at a time:

- Select the checkbox to the left of each members record.
  - Note – Select All capability is coming soon in 2020
- Select Bulk Actions above the records and click Email

- From here, you can change ‘Sender’s Name’ and ‘Reply-To Email’
- Provide Required Fields:
  - Subject
  - Content
• **Optional**
  - **Select Files to Upload**
  - **Copy me on this email (you will receive a copy of the email you are sending)**

• Choose to **Send right now** or **Schedule** message for a later date/time

• Click **Send**
Sending an email to all chapter members and chapter officers

**Note:** The Email module below does not act as an inbox. To view the messages you received, or the replies to your message you sent out, you need to check your personal email inbox. The From name and email address will reflect whoever is logged in.

Click on **Send an Email** in the Quick Links panel

Or

Click on **Emails** under Communication on the left menu.
Click on the green **Compose new message** button on the top right.

You will then be in the Create Email page.
Select recipients
Expand the Persons group to see your chapter distribution lists, which are currently managed by the Internet Society. Select the checkbox to select all members of that group. The system will automatically filter out members who did not provide consent to receive emails, or with missing or bounced/blocked email addresses.

Email Subject and Body – HTML and Plain Text
Provide the email subject and content of the email using the editor provided. Note that by default you will view the HTML version of the email, which allows you to insert images, links, and text formatting. To ensure you also send a Text version, click on the Text Version button located just underneath and to the right of the message editor. You can then click on Copy Content from HTML to make a text version of your message, however take a note of any linked URLs which would have to be added within your content.
Mail Merge Fields
To add merge fields which will insert data from the member’s profile such as their name, click on the dropdown beside the Recipient label of the Templates and Merge Fields section. Select the desired field then click on Add. This will place the field wherever your cursor is located within the body of the message.

Send
You can choose to copy yourself in case you are not in the list of email recipients by clicking the checkbox in front of Copy me on this email.

Save As Draft:
This will save the email without sending.

Send To Myself:
This will send the email to yourself so that you can test how it will appear on an email client (including merge fields and text version).

Send right now or Schedule
You can select Schedule for the email to be sent at a later date or time, or leave it selected as Send right now to send the message immediately.

Send:
Hit "Send" when you are ready to send this message.

Note: Email clients do not support very advanced formatting and embedding of media like video. It is best you keep the email content simple and readable, and adhere to the Internet Society brand guidelines.
Check Stats:
Messages sent from the Emails Module will have Stats available to view dynamically.
- Click on the drop down button under the Actions column from the right hand side of the screen.
- Select Stats

Sample Stats Page

If you run into any bugs or issues and need technical assistance, please contact the AMS Support team at amshelp@isoc.org