



**Internet Society
Association Management System
2009 Chapter Portal**

Chapter Officer First-Use Guide

Introduction

Welcome to the new Internet Society AMS Chapter Portal! ISOC has spent a good part of 2009 ensuring that this portal will meet the needs and requirements of Chapters more than the former portal. As a chapter officer, this is your guide to the new portal functionality, most of which is brand new for 2009.

While a lot of effort has gone into this new system, we understand it will not be perfect in this first iteration. Therefore, please send all feedback (positive, negative, bugs discovered or enhancement requests for the future) to ams-project@isoc.org.

We look forward to hearing from you often, and please let us know if for any reason you cannot access the system as required, if your data is not accurate, or you do not feel the system is functioning as it should.

As discussed on many postings, this iteration of the portal is not open-source. The next major version of this portal will be, as part of our larger-scope Engagement platform. Replacement of this portal with an open-source version will be the immediate goal of AMS 2010.

Thanks –

Lincoln McNey and the ISOC AMS team

Logging into the new AMS Chapter Portal


Before you can access the new portal, you must first select a new password for your account.

Resetting your password for access

Below are step-by-step instructions for accessing the portal:

1. To access the portal, click the URL in your email, or the one displayed below in this guide:
<https://portal.isoc.org/EBusiness/ForgotUID.aspx> (**NOTE:** the portal is now HTTPS). You will see the screen displayed below:

[Home](#) [My Account](#) [Chapter Management](#) [Meetings](#) [About ISOC](#) [Make a Contribution](#) [Logout](#)



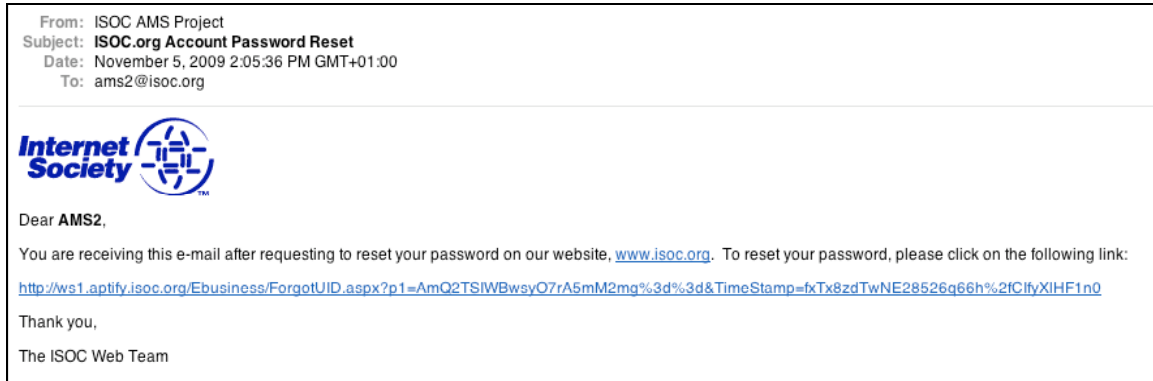
Reset your password

To reset your password, please enter your user ID and click submit. You will get the URL in your email, attached to your user ID. When you open the URL sent, you will be permitted to change your password online and proceed with logging into the web site. If you have forgotten your user ID, please contact ams-project@isoc.org for assistance.

User ID:

Repeat User ID:


2. Reset your password by entering the email address where you received the email. This will dispatch a password-reset email to that address (shown below):



NOTE: As part of the transition to the new system, by default all existing officers and members will need to use their email address AS their username. The user name cannot be changed from within the portal for the time being. If it is important that your username be something other than your email address, please contact ams-project@isoc.org and we will make that change for you.

3. Once the email from the portal has arrived, click that link and choose another password on the screen (displayed below). **NOTE:** For security reasons, the URL is time-sensitive and will expire after 30 minutes.

Home Meetings About ISOC Make a Contribution

Internet Society 

Reset your password

Change your password and proceed with logging into the web site. For any help, please contact ams-project@isoc.org.

User ID:

Repeat User ID:

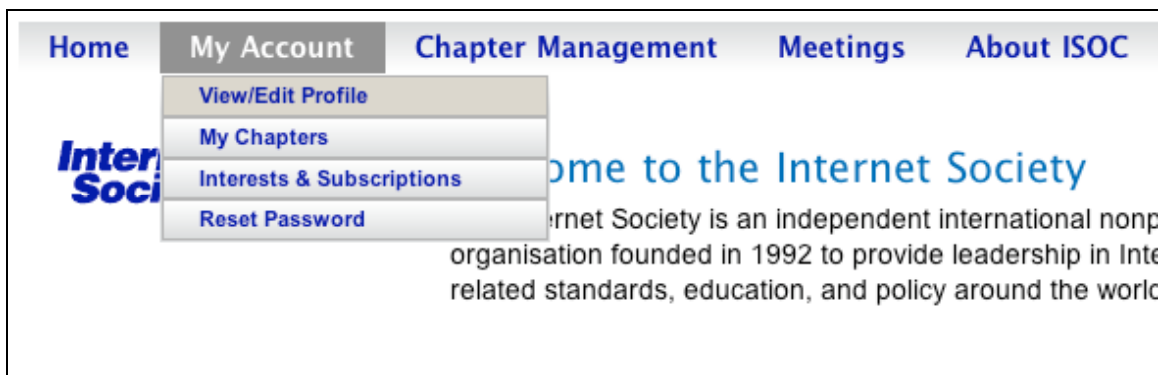
New Password:

Repeat Password:

4. Once that is complete, you should now be logged in and be able to work in the portal.

My Account menu

5. You can now review your personal data, change language and/or date-format preferences, or add other details by clicking on "My Account" and "View/Edit Profile," as shown below:



6. On the resulting Edit Profile page you can change your own personal information, add up to three email addresses and three postal addresses, among other information:

Edit Profile

Personal Information

Member ID 37062

* Email

* First Name

* Last Name

Middle Name

Salutation

Department

Email 2

Email 3

Company

Title

Preferred Language

Preferred Date Format

Primary Job Function

Contact Information

Select Address Type

Preferred Address

Address

City

- If you are a chapter officer and have been set up properly in the system, you should also see the Chapter Management menu enabled. Clicking on the Chapter Management menu item will bring you the My Chapters page (as shown below). This will allow you administrative access to the chapter(s) of which you are an officer.

[Home](#)[My Account](#)[Chapter Management](#)[Meetings](#)

My Chapters

Any chapters of which you are an officer display below. Click on the Chapter Management area.

Chapter
France Chapter
Germany Chapter (ISOC.DE e.V.)

Clicking on the name of the chapter will take you to the Chapter Roster page of that chapter, where you can begin to administer your chapter's data.

Initial Chapter Officer tasks

At go-live, every Chapter Leader/President/Chair will also carry the role of Chapter AMS Administrator. Therefore, at the beginning only the **Chapter President** will be able to manage other chapter officers. All other Officers will see the Chapter Officer buttons greyed out.

Task One: Designate other Chapter AMS Administrator(s)

Home Chapter Roster Reports Edit Chapter Officers Manage Events Edit Terms Add Members Review

Internet Society

Germany Chapter (ISOC.DE e.V.)

Add Officer

Select the officer you want to add from the drop-down list below. Then choose the Role for that officer. Finally, set a date range that will reflect that new officer's tenure for your chapter.

Member: Makkunej, Rinnaan

Role: Alternate Chapter Voting Delegate
 Chapter AMS Administrator
 Chapter Board Member
 Chapter Leader / President / Chair
 Chapter Treasurer (Financial Officer)
 Chapter Voting Delegate
 Deputy Officer
 Vice Chapter Leader / President / Chair

Role Title:

Start Date:

End Date:

[Return to Officer List](#) [Return to Member List](#)

The first task of every Chapter President on the new portal will be to **designate a second Chapter AMS Administrator**, so this person can also manage other Officers if the Chapter President is unavailable.

This is handled via the following steps :

- 1) Once you are logged into the portal, click on the **Chapter Management** menu item on the Home page.
- 2) Click on your Chapter name that appears on the page. It is hyperlinked, and this will take you into your Chapter Management functions.

- 3) Now click on the **Officers** menu item to go to the Chapter Officer's page.
- 4) Click the **Add Officer** button on the main Chapter Officer page. You will now see the page displayed above.
- 5) From the drop-down **Member** field choose a current Member or existing Officer to « promote » to this role.
- 6) From the drop-down **Role** field, choose the Chapter AMS Administrator role for this person
- 7) The **Role Title** field is used if you want to give the Role a different name (for example, in a language other than English) for your chapter. This « local » name will display alongside the system name (Chapter AMS Administrator) on the Chapter Officers page
- 8) Select the **Start Date** for this Role. The person « upgraded » to this role will not have the ability to manage other Officers until this date is reached.
- 9) Select an **End Date** for this Role. The officer's Chapter AMS Manager permissions will end when this date is reached (i.e., if the End Date is 1/1/2010, then on that day the officer will no longer have this Role.
- 10) Once another officer has been designated in this Chapter AMS Administrator role, the President can now « deselect » him/herself from this role (if desired) by marking his/her end date as today's date or in the past.

NOTE : Even if the President does not normally handle this type of operation, he/she will need to designate another Chapter AMS Administrator BEFORE deselecting this role from their own profile. Each chapter must have at least one Chapter AMS Administrator at all times.

Task Two: Editing Chapter Information

One of the first items officers should check is that their chapter information is correct in our system. Officers can access the Edit Chapter page via the menu link at the top of the portal.

Once on this page (shown below), contact information can be edited or added as needed. Please update the chapter-website URL if there is one.

NOTE : Make sure to Save your information before leaving the page.



Germany Chapter (ISOC.DE e.V.)

Edit Chapter

Chapter Name	<input type="text" value="Germany Chapter (ISOC.DE e.V.)"/>
Address	<input type="text" value="ISOC.DE-Sekretariat Chapter"/>
	<input type="text" value="Bretonischer Ring 7"/>
City, State ZIP	<input type="text" value="Grasbrunn"/> <input type="text" value="D-85630"/>
Country	<input type="text" value="Germany"/>
Email	<input type="text" value="sek@isoc.de.SAMPLE"/>
Website	<input type="text" value="http://www.isoc.de"/>

Task Three: Edit Chapter Terms

A single web page has been provided for chapter officers to post their terms of chapter membership. These might include fees, rules of membership, length of membership, etc.

This page will be hyperlinked to your chapter name on Step Three of the membership signup wizard, which is accessed by clicking the Join ISOC link on the Home page. The list of chapters can also be accessed by clicking the Join a Chapter link, which appears if someone is already an ISOC Global Member on login.

Your chapter terms page can be edited by you at any time, by clicking on the Edit Terms menu item, which activates the provided WYSIWYG editor. There is currently placeholder text there, with a link to your chapter website (if it exists). You can update this page at any time.

For further information on chapter officer portal functionality, please see the separate **ISOC Portal Overview** guide.