

GrowthZone - Info Hub Pt. 1: Setup and Options



Overview

Access Levels

- User-type Levels
- How to Customize or Create

Info Hub Login Settings

- Standard Settings
- Advanced Options

Info Hub Settings

- Colors
- Messaging

Info Hub Settings (cont.)

- Other Options
- Terms & Conditions (optional)

Resources

- Manage/add via the back office
- View/add via the Info Hub

Forum (Optional)

- How to Enable
- Manage Member Discussion
 - Add a forum
 - Add Moderator(s)
 - Limit Access

Info Hub – Overview



GrowthZone's Info Hub is a member center that enables your users to access key information and actively engage with your organization and each other. The Info Hub allows users to search the directory of other members, see and register for upcoming events, submit events, sign up for lists and committees, view their membership details, view and complete billing-related actions, see completed certifications, and more.

WIKI: [Info Hub Overview \(with video tour\)](#)

Info Hub – Access Levels

Setup -> Users -> Access Levels

4 User Access Levels set up for all databases:

- User – None
- User – Guest
- User – Standard
- User – Primary

[Back to Setup](#)

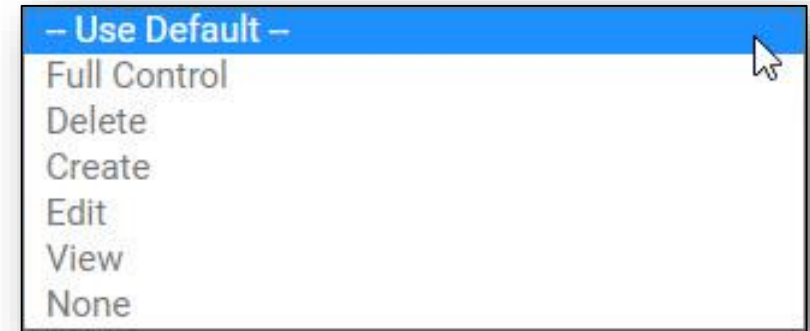
Access Levels

Name	Access Level Type	Description
Staff - Admin	Staff	Full Admin Access
Staff - Guest	Staff	View-Only
Staff - Standard	Staff	Full Editing; View-Only Finance
Staff - Finance	Staff	Full Editing; Full Finance
Staff - Website	Staff	Website Only
User - Guest	User	View-Only Access to all Info Hub Areas
User - Standard	User	Create-new & Edit-existing Access to all Info Hub Areas
User - Primary	User	Create, Edit, & Delete Access to all Info Hub Areas
User - None	User	An Info Hub Role with everything turned off

5 Levels* of hierarchical access/ability:

- None – User cannot view/access
- View – User can view
- Edit – User can change/update existing data
- Create – User can add new data/content
- Delete – User can delete content

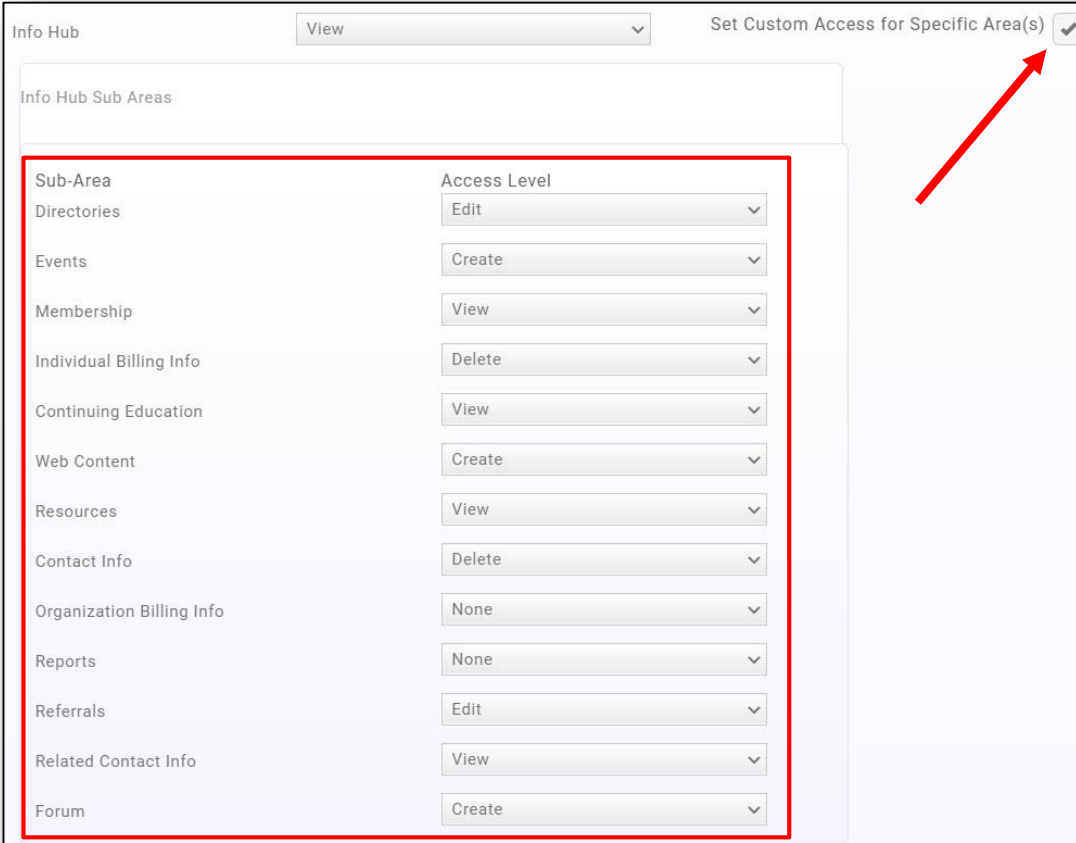
**Full Control has the same abilities as Delete; using Delete is recommended*



WIKI: [View/Edit User \(Member\) Access Levels](#)

Info Hub – Access Levels

You can apply one single “blanket” permission for everything in the Info Hub, but **it is recommended to set custom access for each specific area.**



Info Hub View Set Custom Access for Specific Area(s)

Info Hub Sub Areas



Sub-Area	Access Level
Directories	Edit
Events	Create
Membership	View
Individual Billing Info	Delete
Continuing Education	View
Web Content	Create
Resources	View
Contact Info	Delete
Organization Billing Info	None
Reports	None
Referrals	Edit
Related Contact Info	View
Forum	Create

Info Hub – Access Levels

You can either use the pre-configured user access levels as they are, you can edit them to your preference, or you can set up new/additional access levels as needed.

[Back to Setup](#)

Access Levels



Name	Access Level Type	Description	Users
Staff - Admin	Staff	Full Admin Access	1
Staff - Guest	Staff	View-Only	<No Users>
Staff - Standard	Staff	Full Editing; View-Only Finance	<No Users>
Staff - Finance	Staff	Full Editing; Full Finance	<No Users>
Staff - Website	Staff	Website Only	<No Users>
User - Guest	User	View-Only Access to all Info Hub Areas	<No Users>
User - Standard	User	Create-new & Edit-existing Access to all Info Hub Areas	<No Users>
User - Primary	User	Create, Edit, & Delete Access to all Info Hub Areas	<No Users>
User - None	User	An Info Hub Role with everything turned off	<No Users>

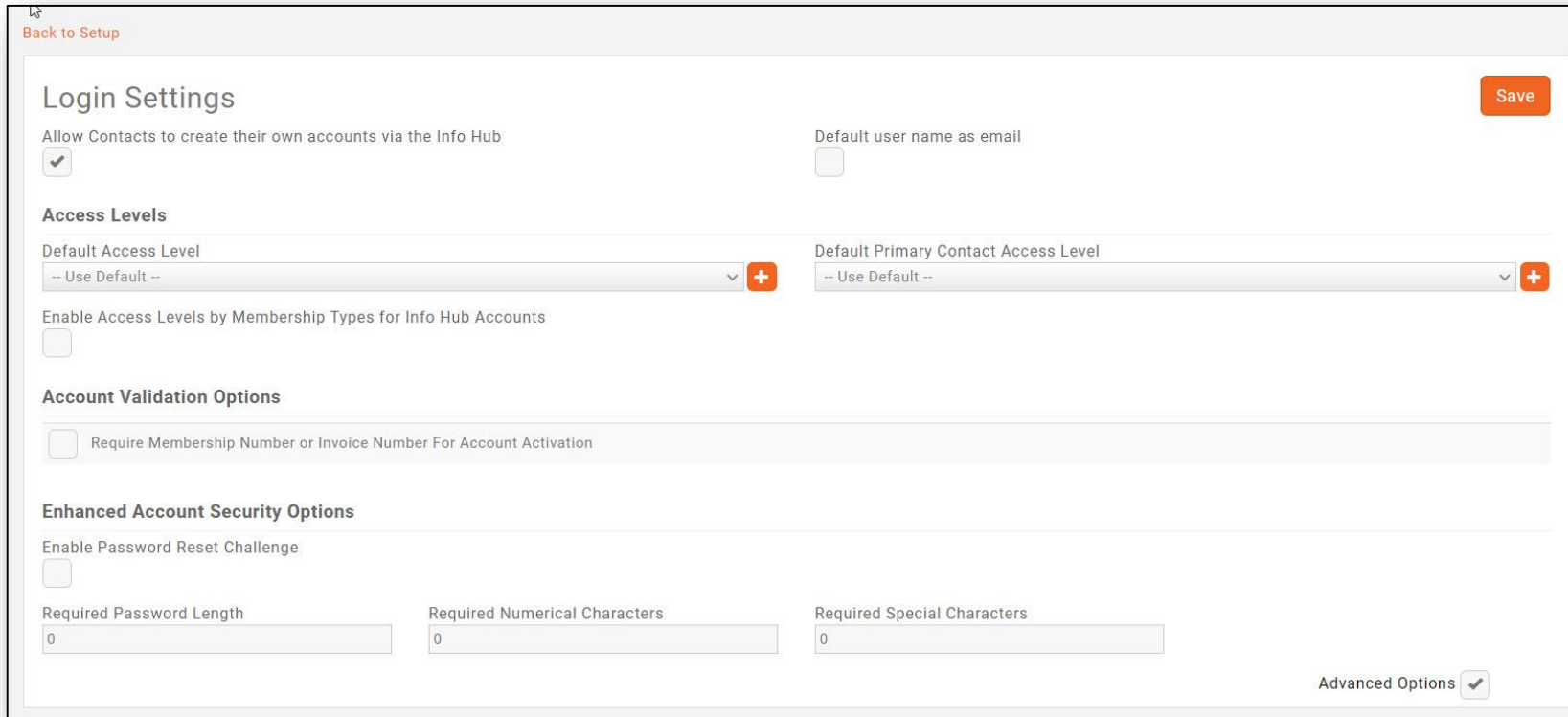
Creating a new user access level

- Click the “Add” button
- Give it a name/description
- Select Access Level Type of “User”
- Scroll down to “Info Hub” and select a level, then enable the “Set Custom Access for Specific Area(s)” checkbox
- Configure access for each area as preferred
- Click “Done”

WIKI: [Create a New Access Level - Users](#)

Info Hub – Login Settings

Setup -> Users -> Login Settings



The screenshot shows the 'Login Settings' configuration page. At the top left is a 'Back to Setup' link. The page title is 'Login Settings' and there is a 'Save' button at the top right. The settings are organized into several sections:

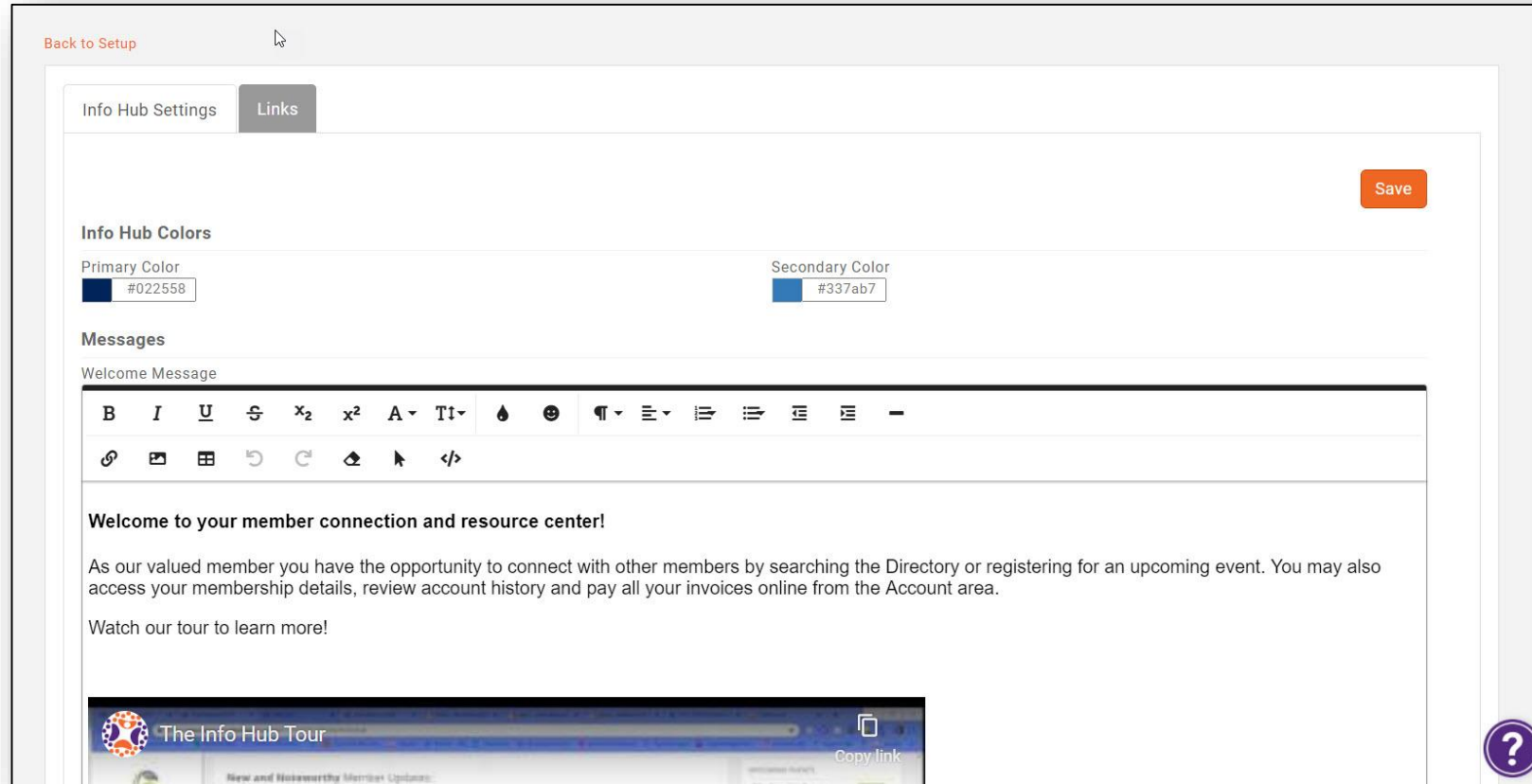
- Allow Contacts to create their own accounts via the Info Hub:** A checkbox that is checked.
- Default user name as email:** An unchecked checkbox.
- Access Levels:**
 - Default Access Level:** A dropdown menu set to '-- Use Default --' with a '+' icon.
 - Default Primary Contact Access Level:** A dropdown menu set to '-- Use Default --' with a '+' icon.
 - Enable Access Levels by Membership Types for Info Hub Accounts:** An unchecked checkbox.
- Account Validation Options:**
 - Require Membership Number or Invoice Number For Account Activation:** An unchecked checkbox.
- Enhanced Account Security Options:**
 - Enable Password Reset Challenge:** An unchecked checkbox.
 - Required Password Length:** A text input field containing '0'.
 - Required Numerical Characters:** A text input field containing '0'.
 - Required Special Characters:** A text input field containing '0'.

At the bottom right, there is an 'Advanced Options' checkbox that is checked.

WIKI: [Set Up Member Access to the Info Hub](#)

Info Hub – Settings

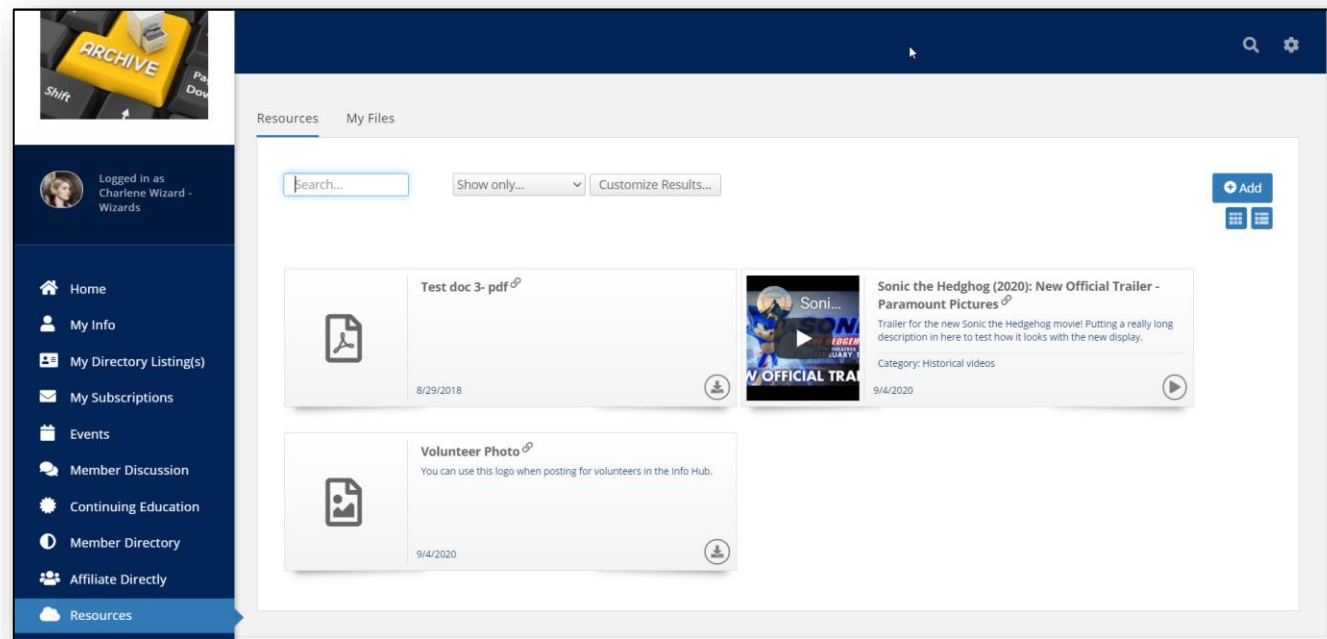
Setup -> Website -> Info Hub Settings



WIKI: [Customize Info Hub Display](#)

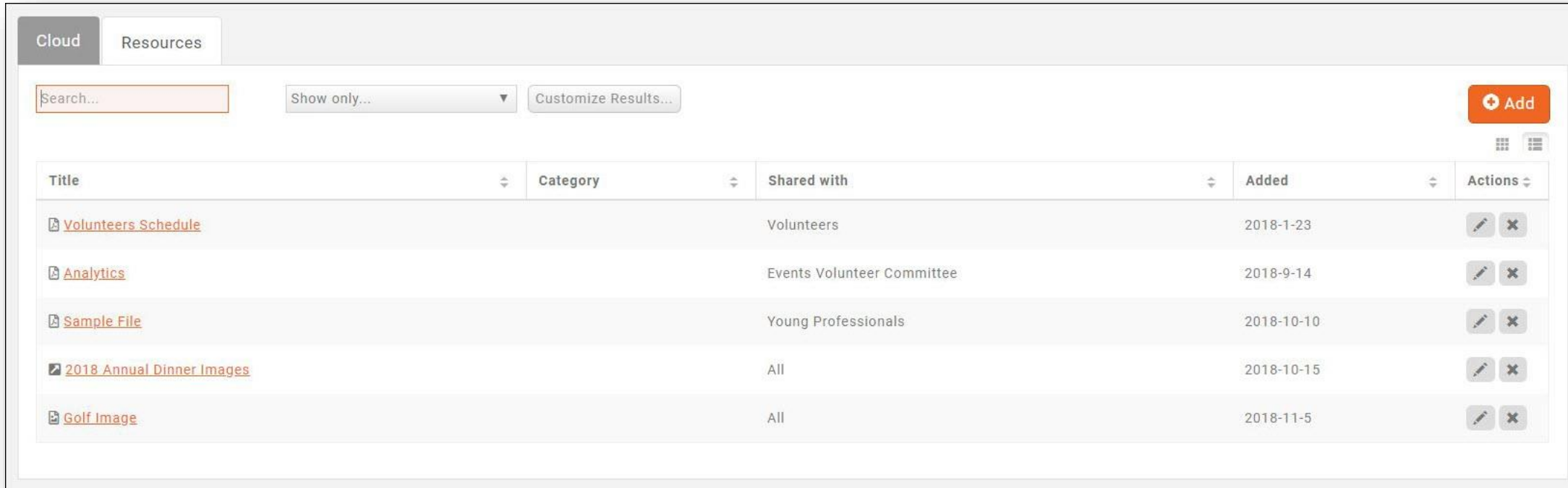
Info Hub - Resources

Via the Info Hub, you and your members can easily share resources. Your members will also be able to upload files to a My Files folder that would only be visible to that member, but also attached to the member's files tab in the back office. Members may add files, images, videos, etc.


















Info Hub – Resources (back office)

On the Cloud Resources tab, staff have the ability to add and manage Info Hub resources from the back office. Staff can easily add, edit, delete, categorize and share resources with contacts in lists or committees without needing to login to the Info Hub.



The screenshot displays the 'Cloud Resources' interface. At the top, there are tabs for 'Cloud' and 'Resources'. Below the tabs is a search bar, a 'Show only...' dropdown menu, and a 'Customize Results...' button. An orange 'Add' button is located in the top right corner. The main content is a table with the following columns: Title, Category, Shared with, Added, and Actions. The table contains five rows of resource data.

Title	Category	Shared with	Added	Actions
 Volunteers Schedule		Volunteers	2018-1-23	 
 Analytics		Events Volunteer Committee	2018-9-14	 
 Sample File		Young Professionals	2018-10-10	 
 2018 Annual Dinner Images		All	2018-10-15	 
 Golf Image		All	2018-11-5	 

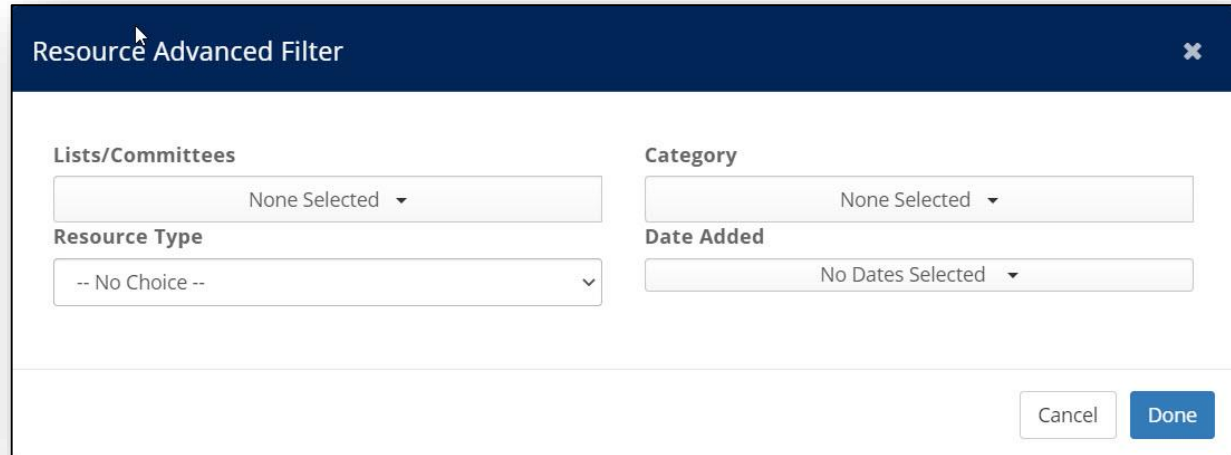
WIKI: [Add/View Info Hub Resources via the Cloud](#)

Info Hub – Resources (Info Hub)

Members must have View access to the Info Hub to see available resources. Additionally, if resources have been limited to certain groups (optional), the members will only see the resources if they belong to the group.

The list of resources may be filtered by clicking the Customize Results option, and selecting from the following filters:

- Resource Type
- Date Added
- Lists/Committees
- Category



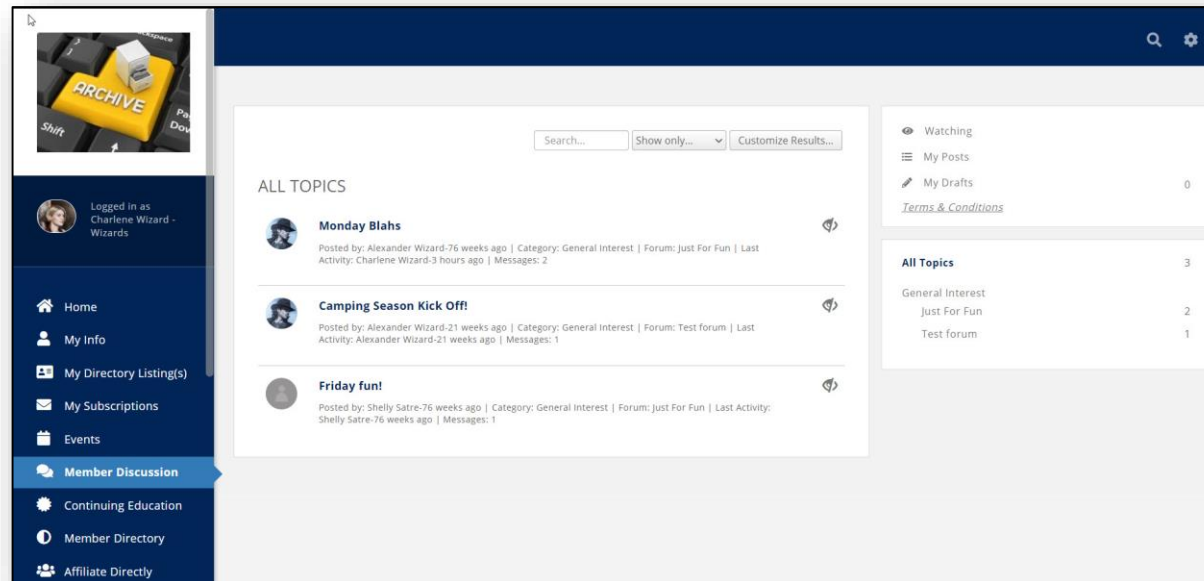
The screenshot shows a dialog box titled "Resource Advanced Filter" with a close button (X) in the top right corner. The dialog contains four filter sections, each with a dropdown menu:

- Lists/Committees:** A dropdown menu showing "None Selected".
- Category:** A dropdown menu showing "None Selected".
- Resource Type:** A dropdown menu showing "-- No Choice --".
- Date Added:** A dropdown menu showing "No Dates Selected".

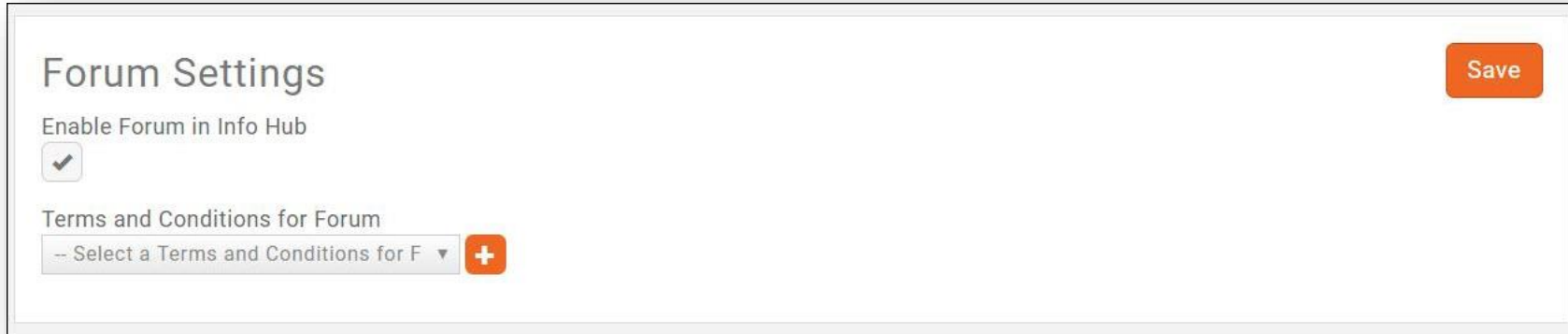
At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

WIKI: [Add/View Resources in the Info Hub](#)

The Info Hub Forum provides you the ability to bring value to members by allowing them to network with to network with like-minded individuals who may be resources for them. The Info Hub Forum provides a way for your members to ask each other questions, exchange information and ideas, share resources, and more.



The Info Hub Forum is included with your GrowthZone subscription, but it is an optional component of the Info Hub. It can be enabled in Setup -> Forum -> General Settings.

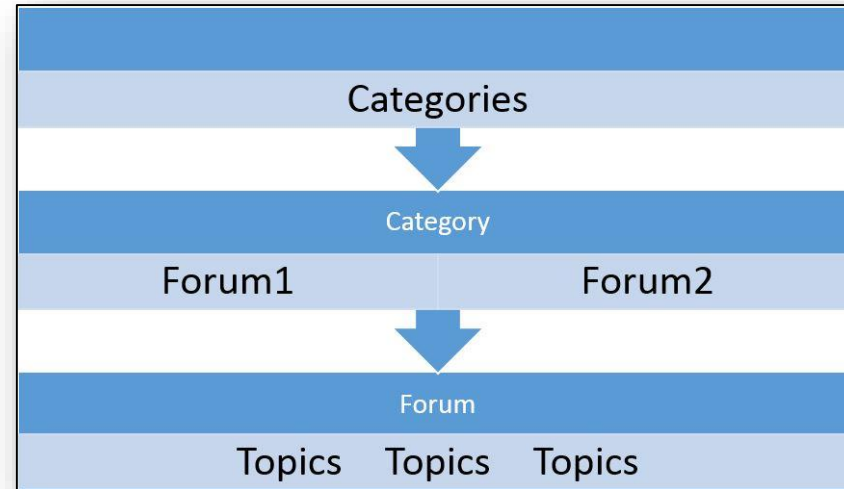


The screenshot shows the 'Forum Settings' interface. At the top right is an orange 'Save' button. Below the title, there is a section 'Enable Forum in Info Hub' with a checked checkbox. Underneath is a section 'Terms and Conditions for Forum' with a dropdown menu showing '-- Select a Terms and Conditions for F' and an orange '+' button to the right.

NOTE: Access to the Forum is permission driven. Your members must be given Create access to participate in the forum.

WIKI: [Info Hub Forum](#)

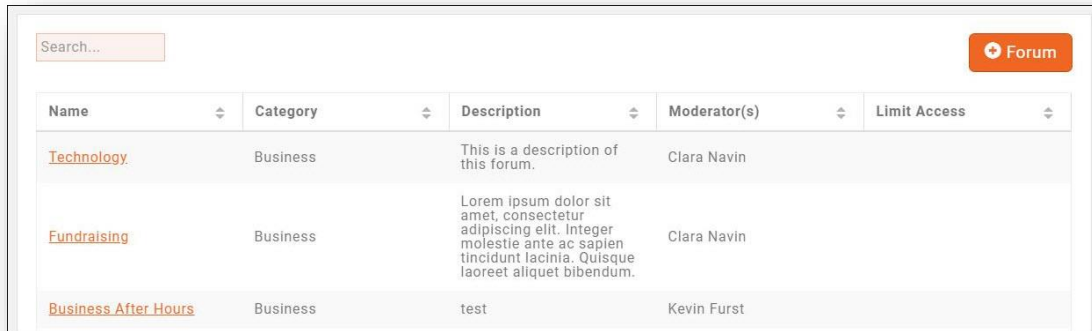
Forums are structured via Forum Categories, Forums, and Topics.



Once the Forum is enabled, you will need to set up your Forum categories in Setup -> Categories -> Forum Categories

WIKI: [Configure Forum Categories](#)

When your Forum Categories are set up, you can then begin adding Forums.



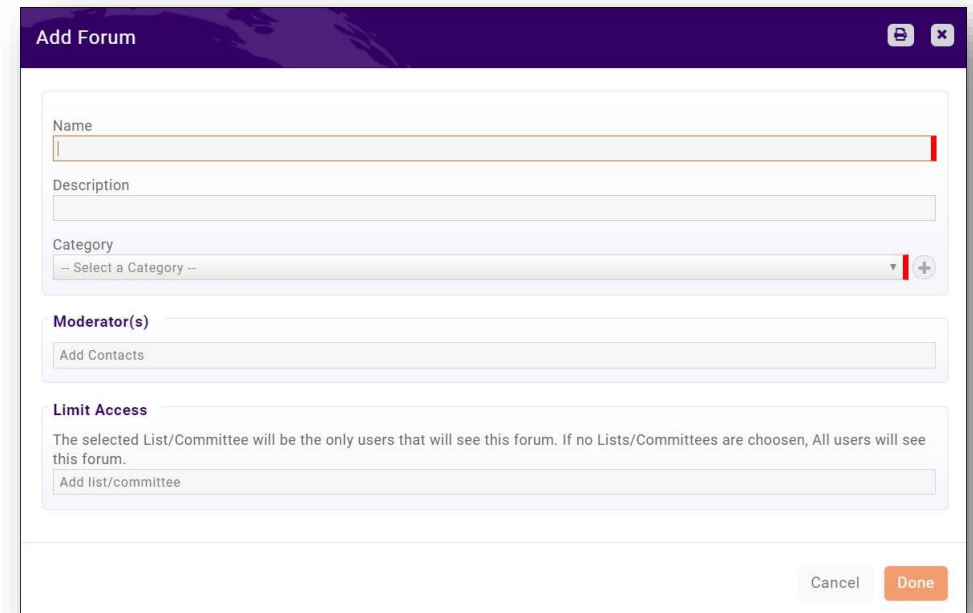
Name	Category	Description	Moderator(s)	Limit Access
Technology	Business	This is a description of this forum.	Clara Navin	
Fundraising	Business	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer molestie ante ac sapien tincidunt lacinia. Quisque laoreet aliquet bibendum.	Clara Navin	
Business After Hours	Business	test	Kevin Furst	

Go to Setup -> Forum -> Manage Member Discussion.

Click the “+ Forum” button

Complete the setup of the forum. You can enter a description, assign moderators, and limit access to certain lists/committees if you wish.

WIKI: [Setup Your Forums](#)



Add Forum

Name:

Description:

Category: -- Select a Category --

Moderator(s):

Limit Access:

The selected List/Committee will be the only users that will see this forum. If no Lists/Committees are chosen, All users will see this forum.

Cancel Done

Questions?



Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Wiki:

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Training Calendar:

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Integrated Help/Chat:

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