

Online Community Setup

This document contains the typical criteria we use to setup your Online Community. Some of the items in this document may not be universally applicable. You may skip anything you don't feel is relevant, or supply corrections, comments, and questions.

Please save your changes frequently if you are worried about losing your work or are waiting on information from other staff.

Getting Started

1. What is your Online Community going to be called? Common examples: Connect, Exchange, Link, Community, Hub, Groups

2. What sub domain would you like to use? Typically matches your community name, but may be a shortened version. Example: connect.myassociation.org

3. What email domain would you like to use? Typically matches your sub domain. Example: connect.myassociation.org; this means emails from the community are sent from group-email-address@connect.myassociation.org

4. If you are purchasing a mobile app option, what would you like your mobile app for your Online Community to be called? Typically matches your Online Community name. Example: My Association Connect

5. Who is in charge of the community? This would be the person in charge of the project typically or in charge of operations. Example tasks: approving group subscription requests (optional), moderating (optional), etc.

6. Please list all staff who should have full administrative rights in the Online Community for tasks such as setting up content, operating the community, adding other staff, etc.

7. Would you like Sengii to create a logo for your Community? (Free) If so, please provide an existing logo file for reference. If not, please provide a logo file for the community. Dimensions are less important than aspect ratio. Ideally the logo file is roughly 2 parts width to 1 part height (a rectangle), and should be much larger than required (ie perhaps 1000px wide). We will resize and crop as needed.

8. Who is the technical contact we should send DNS changes to? These DNS changes are for the website and email hosting of the community on our servers.

9. Who is the billing contact we should send the setup invoice to?

10. Would you prefer electronic payments or mail payments? If electronic please send an invitation request, or ACH form template used by your accounting department.

11. Is there a specific date you would like to fully launch by (production)?

SUBMIT ANSWERS

Discussion Groups

1. What types of groups do you want to include in the Online Community? Common examples: Committees, Sections, Chapters, Task Forces, Regions, Interests, other Demographics, etc.

Enter your answer here

2. Do you want an Open Forum? This is a forum where all members in good standing have access and can talk about any general topics. What do you want the Open Forum to be called? Common examples: Open Forum, Discussions, General, General Discussions.

Enter your answer here

3. Will non-members have access to the Online Community? What groups if so? Examples: Students, Candidates, etc.

Enter your answer here

4. Of the groups you've mentioned for the community, which ones should have no ability to be joined? (ie can only be accomplished via your AMS)

Enter your answer here

5. Of the groups you've mentioned for the community, which ones should have approval based ability to be joined? (ie staff must approve subscription to the group)

Enter your answer here

6. Would you prefer members of groups be automatically opted in to receive emails? In this scenario we recommend daily digest by default. Members who participate in these discussions will receive immediate emails to keep the discussion going. Alternatively you may want your members to receive an invitation email in order to opt in to receive emails. This is basically: ask forgiveness or ask permission. Members can easily unsubscribe from these discussions from any emails the system sends.

Enter your answer here

7. Please mention anything else you feel is important related to Discussion Groups:

Enter your answer here

SUBMIT ANSWERS

Integration

1. What indicates a member in good standing?

Enter your answer here

2. What indicates a non-member who should have access (if they should); this is typically if they are a member of a group in the community, assuming non-members are otherwise typically not allowed in the community.

Enter your answer here

3. What is your AMS? What version? (this may have already been mentioned, but this is for our records)

Enter your answer here

4. What CMS are you using for your website? What version? (this may have already been mentioned, but this is for our records)

Enter your answer here

5. Who develops and supports your website if not the same as your AMS? Please include a best contact.

Enter your answer here

6. Who is hosting your website if not the same as the vendor who develops and supports your website? Please include a best contact.

7. Are there any types of records you feel are critically important that synchronization be as real time as possible? Examples include: member records. Synchronization schedules are typically 5 minutes (minor incremental data), 60 minutes (bulk incremental data), and 24 hours (full synchronization for sanity check and recovery from intermittent network issues).

8. Please mention anything else you feel is important related to Integration:

SUBMIT ANSWERS

Typical Timeline

Setup typically begins upon receipt of the setup deposit. A new AMS we haven't integrated with typically adds about 1 month of setup time. Refer to your quotation for details.

Launch Process

1. After setup we schedule an initial review to capture any changes for further clarifications.
2. After initial review we recommend you launch 1 or 2 pilot groups to use the system and provide feedback.
3. After pilot groups we recommend you launch all groups other than your largest membership group (ie Open Forum). Your other group members may seed the Open Forum with content initially to make it easier for your members to understand the purpose of the Online Community.
4. Finally we launch the Open Forum for your full membership.

This process is typical but can vary. If your timeline is very short, some of these steps may be consolidated or skipped. If you have a small membership, you may wish to launch more rapidly after initial review and feedback.