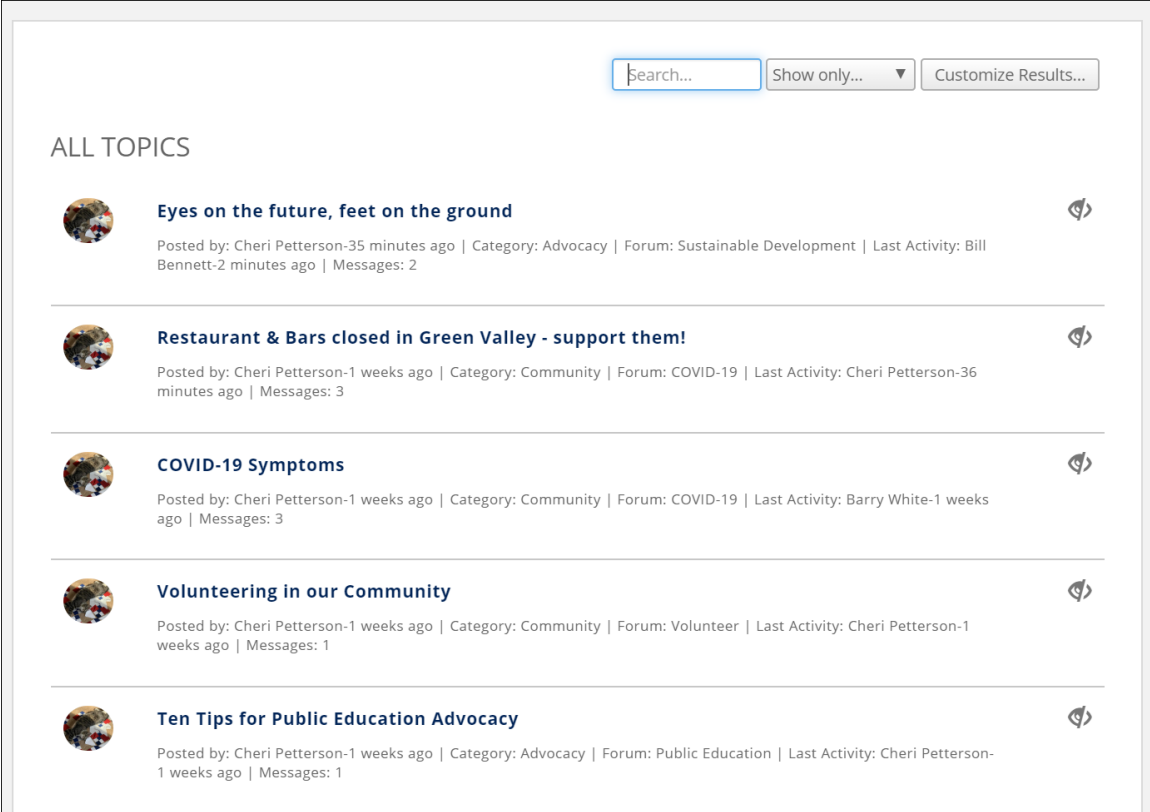


# Working with the GrowthZone Forum



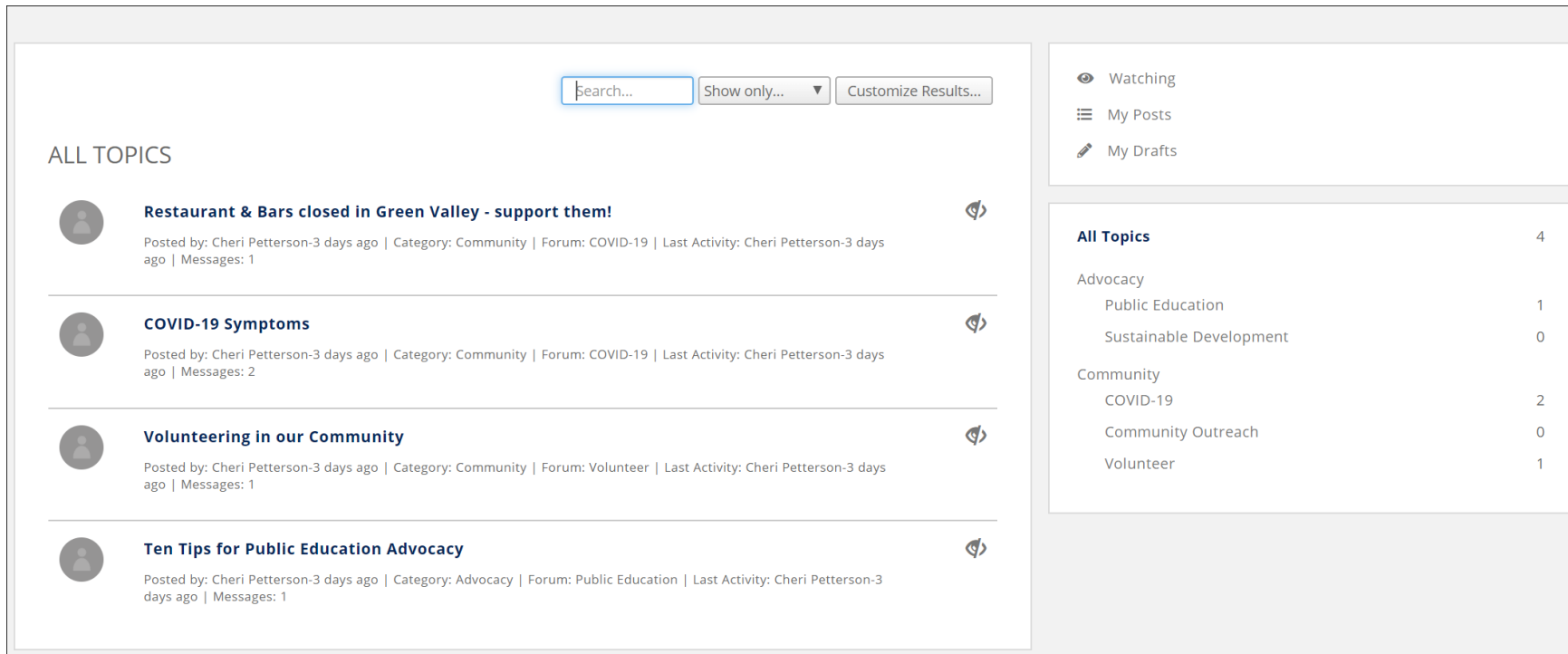
- ❑ Overview of the Forum
- ❑ Setting Up Your Forum
  - Terminology
  - Terms & Conditions
  - Enable Forum
  - Design Categories
  - Create Forums
- ❑ Member Participation in the Forum



The screenshot displays a forum interface with a search bar and filters at the top. Below the search bar, the text "ALL TOPICS" is visible. A list of five forum topics is shown, each with a profile picture, a title, and a brief description of the post. The topics are:

- Eyes on the future, feet on the ground**  
Posted by: Cheri Petterson-35 minutes ago | Category: Advocacy | Forum: Sustainable Development | Last Activity: Bill Bennett-2 minutes ago | Messages: 2
- Restaurant & Bars closed in Green Valley - support them!**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-36 minutes ago | Messages: 3
- COVID-19 Symptoms**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Barry White-1 weeks ago | Messages: 3
- Volunteering in our Community**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: Volunteer | Last Activity: Cheri Petterson-1 weeks ago | Messages: 1
- Ten Tips for Public Education Advocacy**  
Posted by: Cheri Petterson-1 weeks ago | Category: Advocacy | Forum: Public Education | Last Activity: Cheri Petterson-1 weeks ago | Messages: 1

A forum is a great medium with which your members can solicit the advice from peers, benefit from their experience, and participate in an ongoing conversations



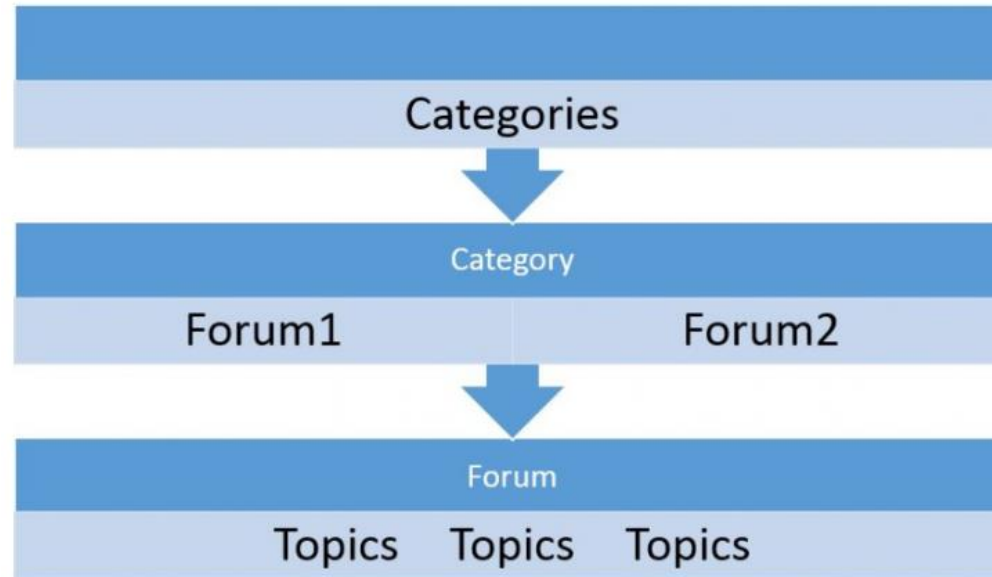
The screenshot displays a forum interface. At the top, there is a search bar with the text "Search...", a "Show only..." dropdown menu, and a "Customize Results..." button. Below this is the "ALL TOPICS" section, which lists four topics, each with a user profile icon, a title, and a brief description of the post. The topics are:

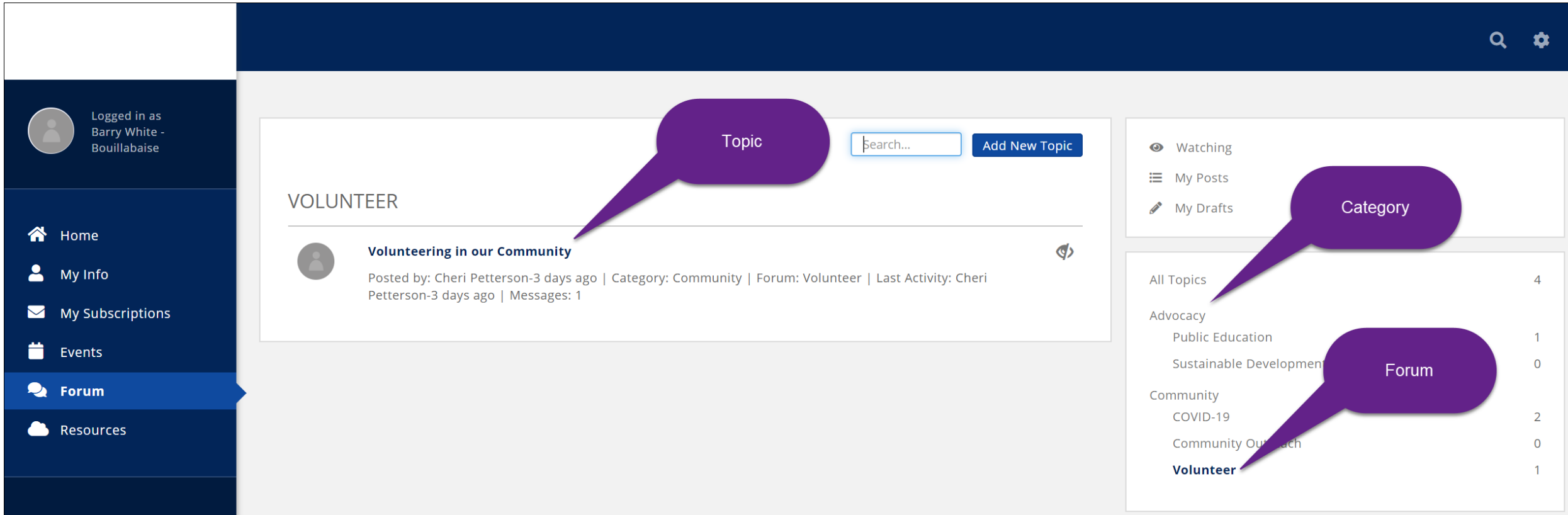
- Restaurant & Bars closed in Green Valley - support them!**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-3 days ago | Messages: 1
- COVID-19 Symptoms**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-3 days ago | Messages: 2
- Volunteering in our Community**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: Volunteer | Last Activity: Cheri Petterson-3 days ago | Messages: 1
- Ten Tips for Public Education Advocacy**  
Posted by: Cheri Petterson-3 days ago | Category: Advocacy | Forum: Public Education | Last Activity: Cheri Petterson-3 days ago | Messages: 1

On the right side of the interface, there is a sidebar with navigation options: "Watching", "My Posts", and "My Drafts". Below these is a "All Topics" section with a list of categories and their corresponding message counts:

| Category                | Count |
|-------------------------|-------|
| All Topics              | 4     |
| Advocacy                |       |
| Public Education        | 1     |
| Sustainable Development | 0     |
| Community               |       |
| COVID-19                | 2     |
| Community Outreach      | 0     |
| Volunteer               | 1     |

## Forum Structure





The screenshot shows a forum interface with a dark blue header and a light grey main content area. On the left is a dark blue sidebar with navigation options. The main content area features a search bar, an 'Add New Topic' button, and a list of forum topics. A right-hand sidebar contains user options and a category list. Three purple callout boxes highlight specific elements: 'Topic' points to the title of a forum post, 'Category' points to a category in the right sidebar, and 'Forum' points to the 'Volunteer' category in the right sidebar.

**Topic**

**Category**

**Forum**

Logged in as Barry White - Bouillabaise

Home  
My Info  
My Subscriptions  
Events  
**Forum**  
Resources

VOLUNTEER

Search... Add New Topic

**Volunteering in our Community**

Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: Volunteer | Last Activity: Cheri Petterson-3 days ago | Messages: 1

Watching  
My Posts  
My Drafts

All Topics 4  
Advocacy  
Public Education 1  
Sustainable Development 0  
Community  
COVID-19 2  
Community Outreach 0  
**Volunteer** 1

# Setup the Forum

## Customize Forum Terminology

- If you would like to use a different name for your Forum, this can be customized under Setup > System Terminology
- WIKI: [Setup System Terminology](#)

[Back to Setup](#)

### Terminology Settings

| Term                                  | Description                                       | Term Omitted | Your Custom Term | Plural Form |
|---------------------------------------|---|--------------|------------------|-------------|
| <a href="#">Business</a>              | A business, organization, company or other entity | No           |                  |             |
| <a href="#">Chapter</a>               | A local branch                                    | No           |                  |             |
| <a href="#">Contact</a>               | A record for a business, individual or family     | No           |                  |             |
| <a href="#">Donation/Contribution</a> | A monetary gift or contribution                   | No           |                  |             |
| <a href="#">List/Committee</a>        | A user defined list of contact records            | No           |                  |             |





















# Setup the Forum – Terms & Conditions

Define Terms & Conditions (or Code of Conduct) for participation in the forum  
**Setup > Terms & Conditions**

Edit Term/Condition < 2 of 2 > ✕

Name

Description

**B** *I* U ~~ABC~~  $x_2$   $x^2$  A ▾ T↑ ▾                       

Welcome to Green Valley Association online Forum. The Forum is presented for the purpose of connecting the Association Forum members, sharing information and creating a peer-to-peer forum for the discussion of issues relating to our association.

By joining the Forum, you agree that you have read and will follow the rules, terms and conditions set forth below. You also agree to reserve discussions and shared files and content to that best suited to the medium. This is a great medium with which to solicit the advice of your peers, benefit from their experience, and participate in an ongoing conversation.

Delete Cancel Done

# Setup the Forum

## WIKI: Enable Forum

### Forum Settings

We've recently released our Forum feature. *This new feature is in **Beta***, meaning we are continuing to improve its functionality.

**Before you check the "Enable Forum in Info Hub" checkbox** (below), you will want to ensure:

1. You have **set up your Categories and Forums**. To do this go to Setup> Manage Forum. In order for your Info Hub users to post Topics, Staff members will need to set Forum Categories and create Forums for users to post to. This is what will build the structure in the right hand navigation of your forum. [See example](#).
2. You have **set the permission levels** of those that you wish to participate in the Forum to "Create". To do this go to Setup> Access Levels> Choose an access level> Info Hub, choose custom> and set Forum to "Create" instead of None. [See a screenshot](#).

Once you check the "Enable Forum in Info Hub" checkbox, the forum feature will then be visible to your Info Hub users.

For more information on setup and how members can utilize the forum, [visit our support wiki](#).

Enable Forum in Info Hub

Terms and Conditions for Forum  
-- Select a Terms and Conditions for Forum -- [+](#)

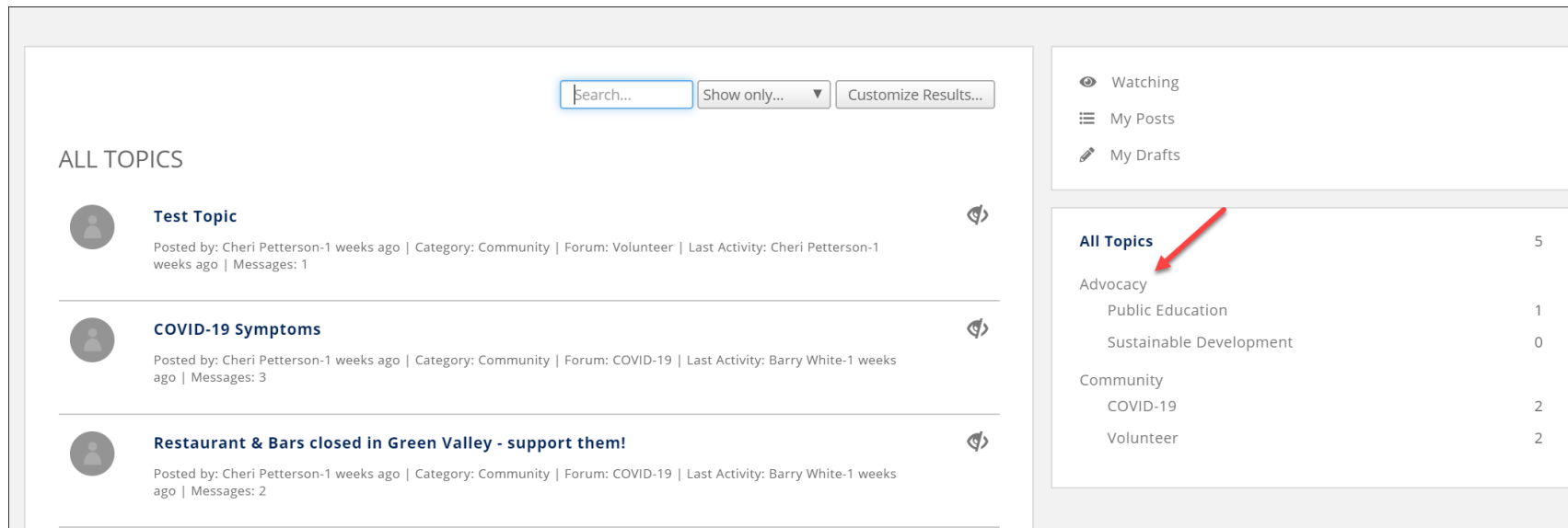
[Save](#)



## Forum Categories

Categories are the top-level organization of your forum. Well-defined Categories will help your members find the information they seek

- WIKI: Create Forum Categories



The screenshot displays a forum interface. At the top, there is a search bar with the text "Search...", a "Show only..." dropdown menu, and a "Customize Results..." button. Below this, the main content area is titled "ALL TOPICS" and lists three topics:

- Test Topic**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: Volunteer | Last Activity: Cheri Petterson-1 weeks ago | Messages: 1
- COVID-19 Symptoms**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Barry White-1 weeks ago | Messages: 3
- Restaurant & Bars closed in Green Valley - support them!**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Barry White-1 weeks ago | Messages: 2

On the right side, there is a sidebar with navigation options: "Watching", "My Posts", and "My Drafts". Below these is a "All Topics" section with a red arrow pointing to the "All Topics" link. This section lists categories and their respective message counts:

| Category                | Count |
|-------------------------|-------|
| All Topics              | 5     |
| Advocacy                |       |
| Public Education        | 1     |
| Sustainable Development | 0     |
| Community               |       |
| COVID-19                | 2     |
| Volunteer               | 2     |

# Add Forums

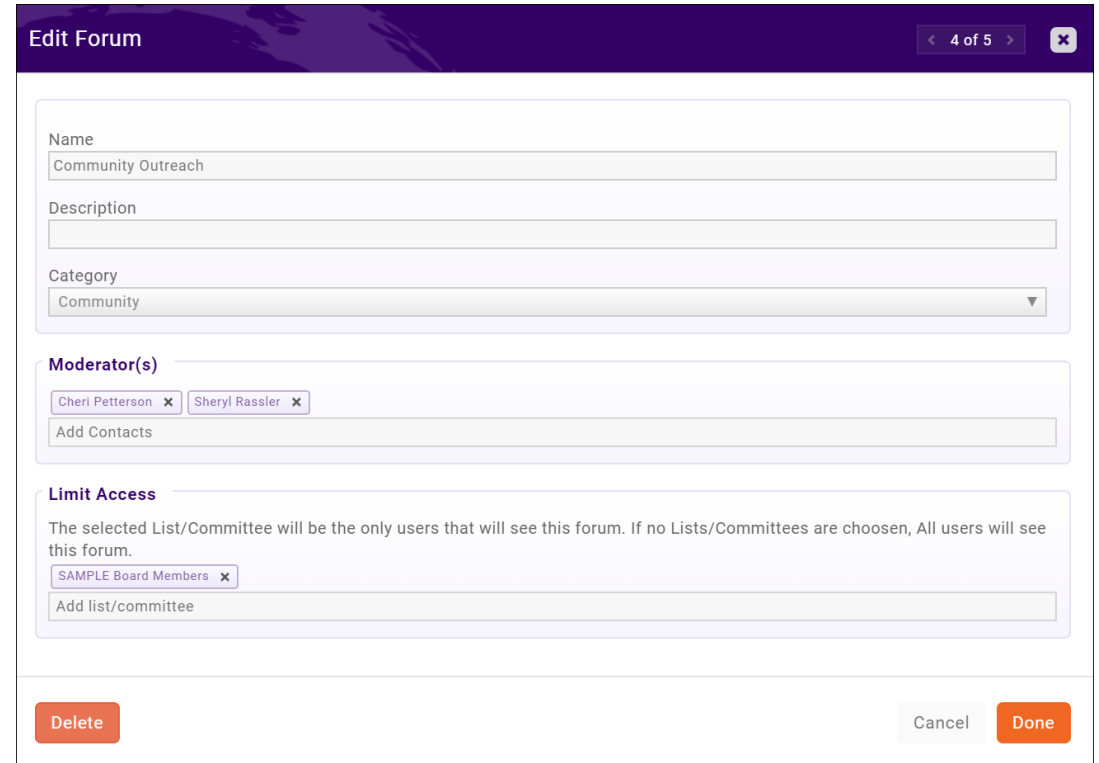
Each of your forum categories are sub-divided into multiple forums. Forums may only be added by staff from the back-office

## Assign a Moderator

- You may have multiple moderators for a forum.
- Moderators may delete topics and comments added to their forum

(Optional) Limit access to this forum to specific groups

WIKI: [Add Forums](#)



The screenshot shows the 'Edit Forum' interface. At the top, there is a purple header with the text 'Edit Forum' and a navigation bar with '< 4 of 5 >' and a close button 'x'. The main content area is divided into several sections:

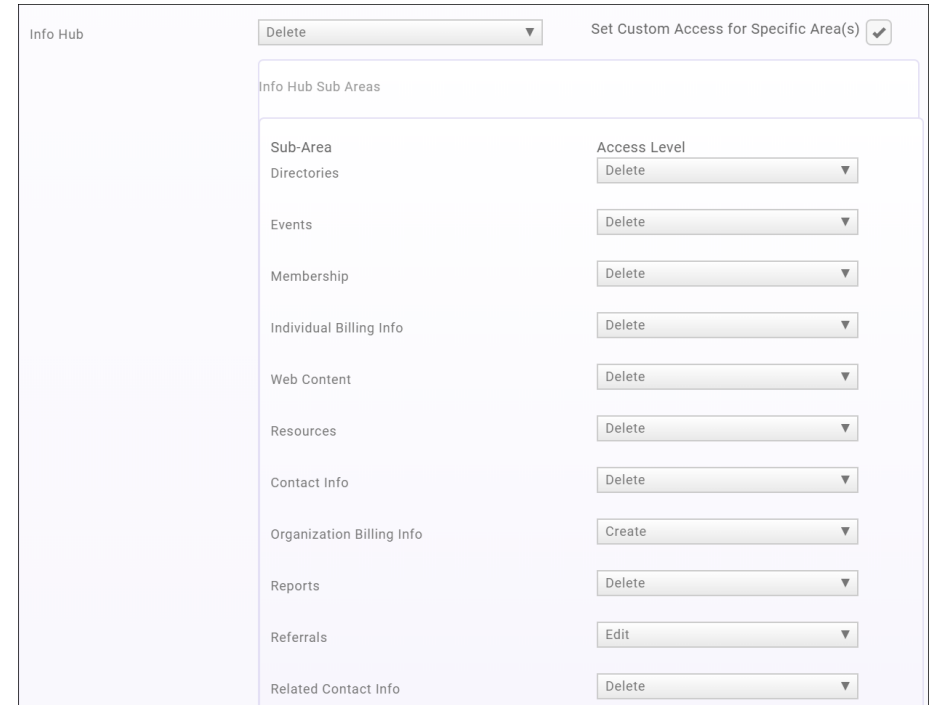
- Name:** A text input field containing 'Community Outreach'.
- Description:** An empty text input field.
- Category:** A dropdown menu with 'Community' selected.
- Moderator(s):** A section with two tags: 'Cheri Petterson x' and 'Sheryl Raasler x'. Below the tags is an 'Add Contacts' input field.
- Limit Access:** A section with a text input field containing 'SAMPLE Board Members x'. Below it is an 'Add list/committee' input field. A note reads: '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.'

At the bottom of the form, there are three buttons: 'Delete' (orange), 'Cancel' (grey), and 'Done' (orange).

# Member Access to the Forum

## Ensure your members have access to the Forum

- Your members must be given Create access to participate in the forum.
- WIKI: Create a New Access Level - Users



Info Hub

Delete

Set Custom Access for Specific Area(s)

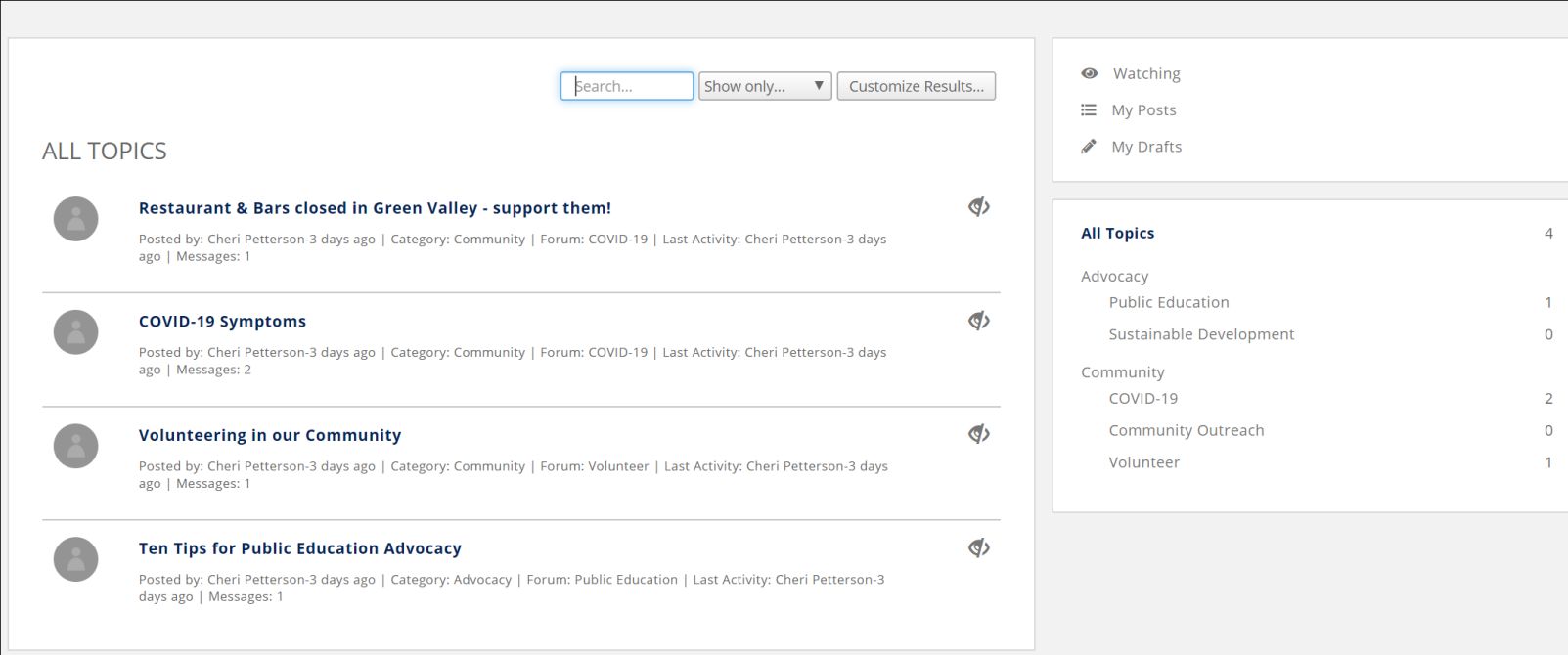
Info Hub Sub Areas

| Sub-Area                  | Access Level |
|---------------------------|--------------|
| Directories               | Delete       |
| Events                    | Delete       |
| Membership                | Delete       |
| Individual Billing Info   | Delete       |
| Web Content               | Delete       |
| Resources                 | Delete       |
| Contact Info              | Delete       |
| Organization Billing Info | Create       |
| Reports                   | Delete       |
| Referrals                 | Edit         |
| Related Contact Info      | Delete       |

# Member Participation in the Forum

Members can easily view and follow discussions, see popular discussions, and receive notifications of key information

WIKI: [Member Participation in the Forum](#)



The screenshot displays a forum interface with a search bar at the top containing the text "Search...". To the right of the search bar are two buttons: "Show only..." with a dropdown arrow and "Customize Results...".

The main content area is titled "ALL TOPICS" and lists four forum posts, each with a user profile icon, a title, and a follow icon:

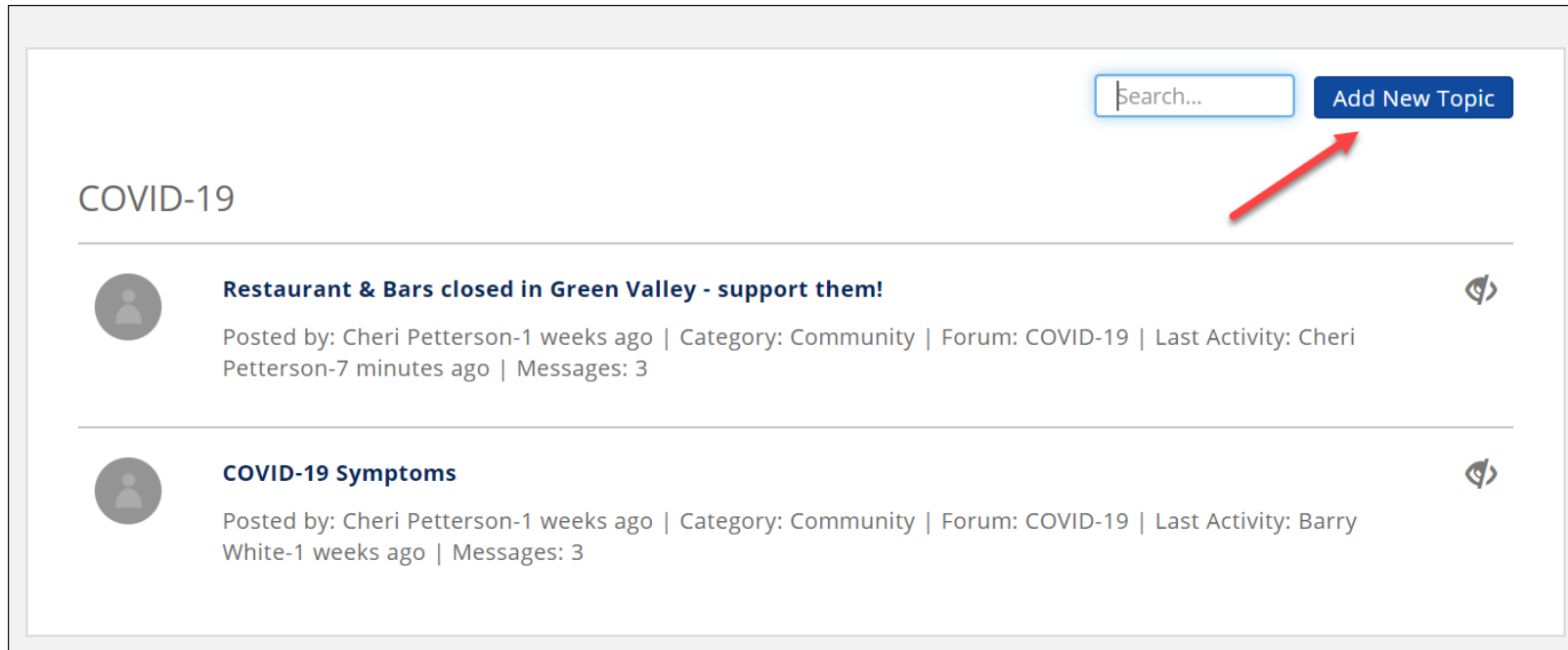
- Restaurant & Bars closed in Green Valley - support them!**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-3 days ago | Messages: 1
- COVID-19 Symptoms**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-3 days ago | Messages: 2
- Volunteering in our Community**  
Posted by: Cheri Petterson-3 days ago | Category: Community | Forum: Volunteer | Last Activity: Cheri Petterson-3 days ago | Messages: 1
- Ten Tips for Public Education Advocacy**  
Posted by: Cheri Petterson-3 days ago | Category: Advocacy | Forum: Public Education | Last Activity: Cheri Petterson-3 days ago | Messages: 1

The right sidebar contains navigation options: "Watching" (with an eye icon), "My Posts" (with a list icon), and "My Drafts" (with a pencil icon). Below these is a section titled "All Topics" which lists various categories and their corresponding message counts:

| Category                | Count |
|-------------------------|-------|
| All Topics              | 4     |
| Advocacy                |       |
| Public Education        | 1     |
| Sustainable Development | 0     |
| Community               |       |
| COVID-19                | 2     |
| Community Outreach      | 0     |
| Volunteer               | 1     |

# Member Participation in the Forum

- Members may add topics to any of the forums they have access to.
- Must be within a Forum for the **Add a New Topic** button to be displayed.
- WIKI: Add Topics



The screenshot displays a forum interface for the 'COVID-19' category. At the top right, there is a search bar with the placeholder text 'Search...' and a blue 'Add New Topic' button. A red arrow points to the 'Add New Topic' button. Below the search bar and button, the forum title 'COVID-19' is displayed. The forum content consists of two posts, each with a user profile picture, a title, and a summary of the post content.

COVID-19

**Restaurant & Bars closed in Green Valley - support them!**

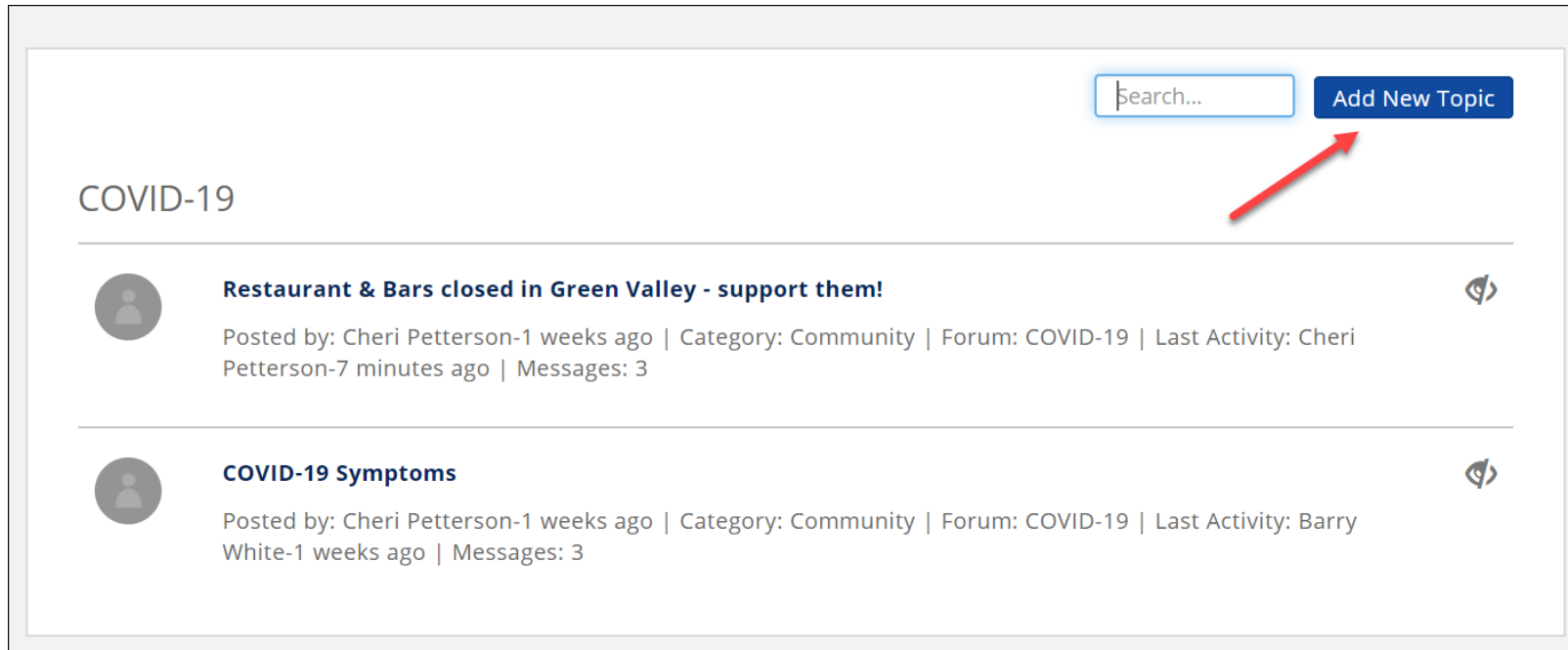
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-7 minutes ago | Messages: 3

**COVID-19 Symptoms**

Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Barry White-1 weeks ago | Messages: 3

# Member Participation in the Forum

- Members may add topics to any of the forums they have access to.
- Must be within a Forum for the **Add a New Topic** button to be displayed.
- WIKI: [Add Topics](#)



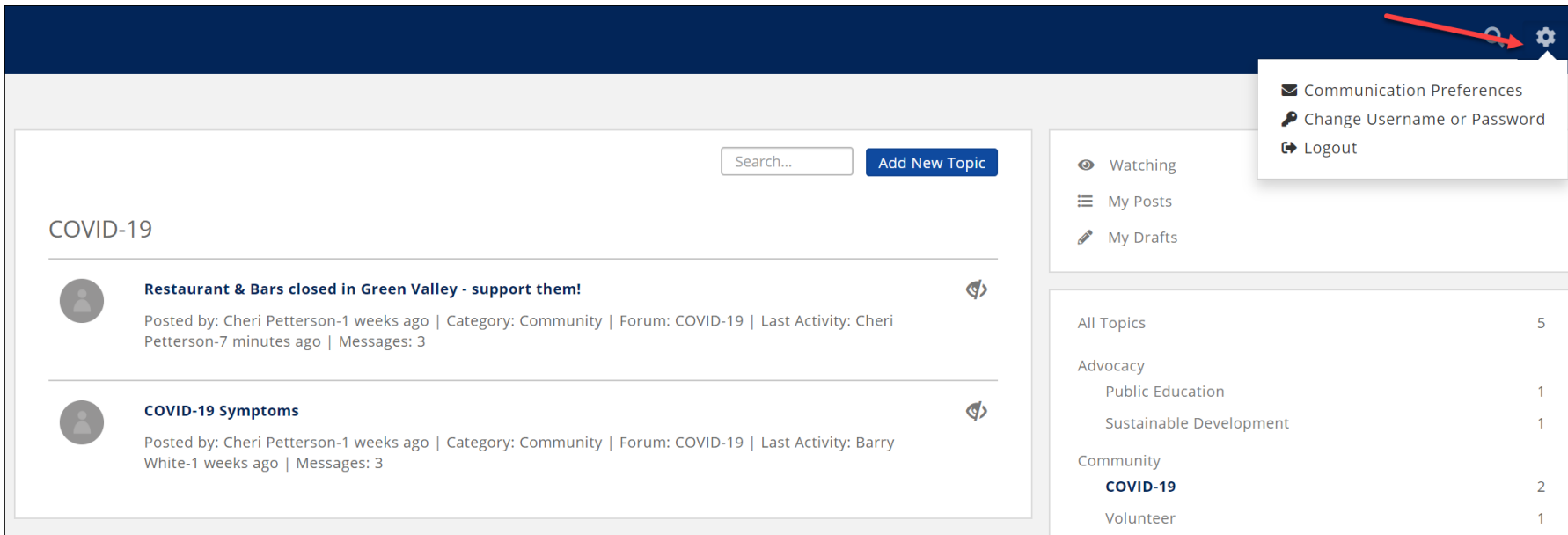
The screenshot displays a forum interface for the 'COVID-19' category. At the top right, there is a search bar with the placeholder text 'Search...' and a blue button labeled 'Add New Topic'. A red arrow points to the 'Add New Topic' button. Below the search bar, the forum title 'COVID-19' is displayed. The forum contains two posts:

- Restaurant & Bars closed in Green Valley - support them!**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Cheri Petterson-7 minutes ago | Messages: 3
- COVID-19 Symptoms**  
Posted by: Cheri Petterson-1 weeks ago | Category: Community | Forum: COVID-19 | Last Activity: Barry White-1 weeks ago | Messages: 3

# Member Participation in the Forum

## Set Preferences for Forum Notifications

- Members can setup notifications for new topics, comments to their own topics, etc.
- WIKI: [Set Preferences for Forum Notifications](#)



The screenshot shows a forum interface with a dark blue header. A red arrow points to a gear icon in the top right corner, which has opened a user profile menu. The menu contains three options: 'Communication Preferences' (with an envelope icon), 'Change Username or Password' (with a key icon), and 'Logout' (with a door icon). Below the menu, there are three navigation options: 'Watching' (with an eye icon), 'My Posts' (with a list icon), and 'My Drafts' (with a pencil icon). The main content area is titled 'COVID-19' and features a search bar and an 'Add New Topic' button. Below the title, there are two forum posts. The first post is titled 'Restaurant & Bars closed in Green Valley - support them!' and was posted by Cheri Petterson 1 week ago. The second post is titled 'COVID-19 Symptoms' and was also posted by Cheri Petterson 1 week ago. On the right side of the forum, there is a table of contents for the forum topics.

|                         |   |
|-------------------------|---|
| All Topics              | 5 |
| Advocacy                |   |
| Public Education        | 1 |
| Sustainable Development | 1 |
| Community               |   |
| <b>COVID-19</b>         | 2 |
| Volunteer               | 1 |

# Member Participation in the Forum

Email Frequency

Forum Level Email Preferences

Topic Level Email Preferences

### My Email Subscriptions

The Table below is a list of the email subscriptions you are a part of. If the box is checked, you are currently subscribed.

**Email Address**

-- Select an Email Address --

| <input type="checkbox"/> | LIST NAME | DESCRIPTION |
|--------------------------|-----------|-------------|
|--------------------------|-----------|-------------|

### Forum Notifications

The following settings are for the Forums and Topics you are currently watching. See all of the items you are watching by clicking on the "Watching" filter on the top right side of the forum.

**Email Frequency**

As it happens

**Forum Level Email Preferences**

-- Select a Forum Level Email Preferences --

**Topic Level Email Preferences**

-- Select a Topic Level Email Preferences --



Questions??

