P.E.O. LOCAL CHAPTER PORTAL

A web service for local chapters: www.localchapterpeo.org
Summary

- A portal is a website service for local chapters
- Local chapter members can log in to their home page portal to access documents and set up events
- Documents can be downloaded from the website
- Events can be entered and listed either just on the local chapter home page or, if specified, on the state website until the event is over when it will automatically drop off
- Cost: $75 per year (includes website and support)
Getting Started

- To get started, there is a link at the bottom of the login box for local chapters to sign up for this service.
- One person from your chapter fills out the form to set up an account.
- An invoice will be sent within a few days to that person via email for the annual fee.
- This person will now be able to log in immediately to the local chapter home page, upload documents and enter events if desired.
Login Box on State Home Page

<table>
<thead>
<tr>
<th>Local Chapter Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>State:</td>
</tr>
<tr>
<td>Chapter:</td>
</tr>
<tr>
<td>Password:</td>
</tr>
</tbody>
</table>

If your chapter wants to sign up for this service, click here.

The click here link will take you to the getting started form where you can request an account. The form will ask for your name, chapter letters, city, state, postal code, phone, email, passwords you want to set and the name of your chapter president if you are not that person. The person who requests the account will become the administrator.

No money is required at this time. You will be sent an invoice by WebReliance, Inc. for the annual fee.

A confirmation will be emailed to you when you submit the form. Then you will have the opportunity to log in to the website and begin.

6/30/2010
Sample Form to Get Started

- First Name
- Last Name
- Chapter
- President’s First name if different from above / Last name
- City and Postal Code
- Email
- Phone
- Portal password for the chapter (must be unique to your chapter for security reasons)
- Admin password (to upload documents and enter events)

On submission of the form, an email will be sent to the address above with the password and instructions to the admin. An invoice will follow.

6/30/2010
The Login Screen after creating an account

☐ Your state will be visible
☐ Your chapter will be chosen
☐ You will need to enter the password you created for the chapter
Home page after logging in for the first time:

Admin enters password to activate editing
Setting Up Your Home Page

- The Administrator can set up the website after she logs in.
  - The Admin mode can be turned on by entering the admin password into the lower right box and clicking Login (see previous slide).

- Admin screen features
  - Upload a convention logo, board photo or something that is uniquely your chapter (any image file), if desired, to be displayed on home page.
  - Type in a welcome message to be displayed on the home page.
  - Upload documents like yearbooks, member lists, your chapter calendar, photos of members, etc. specifying the name of the document. Documents can be deleted here also.
  - Enter/edit or delete events (start date, end date, name of event, description and person to contact). A checkbox will make the event display on the state events page if checked. Otherwise, the event will only show on the local chapter home page.
  - Change the Admin password.
Sample Admin screen

- Upload an image or photo
- Enter a welcome message
- Upload documents
- Create events
- Change passwords
- Exit admin mode link
Uploading an image

- Click on the Pen icon
- A box with a Browse button and a Save icon will appear

- Click the Browse button and find your image on your computer; Open it
- Click the Save icon; your image is uploaded
- Click the exit admin mode link on the lower right of the screen
- You can redo the upload if you like by redoing the steps above; click on the pen again. Be sure and upload small images.

6/30/2010
Creating a Welcome Message

- You will want to make a welcome message for your other chapter sisters to see when they log in.
- Log in as the admin again.
- Click the pen icon on the right side.
- You will see a box appear to type in. When you are finished, click the Save icon.
- If you want to change the message, just click the pen again.
- Click the exit admin mode link in the lower right corner.

6/30/2010
Uploading documents

- You can upload documents that will be links for others to click on and open or download.
- Click the icon to add a document.

- A Browse button will appear; click it.
Uploading documents (2)

- Find the document file you want to upload and open it.
- Click the Save icon.
- A link will appear with the name of the document.
- Click this link to open or download.
- File types you can upload: PDF, Word, Excel, PowerPoint, image files like .jpg and .gif, etc.
- Repeat the process to upload more files.
Events

- You can create events that will be visible on this home page for your chapter or mark them to be on the state on a local chapter web page.
- Events are added the same way as documents. Click the gold plus sign to begin.

- A form will appear for you to enter information.
Events (2)

- The form filled in with information:

- You can check Statewide to have it appear on your state’s local chapter events web page. Events will drop off automatically when the date is past.

- Be sure to click the Save icon when you are done.
Events (3)

- After you save the event, it will appear as below:

  □ You have the ability to edit the event with the Pen icon.
  □ You can delete the event with the Red “x” icon.
  □ Add more events with the same process.
Changing passwords

- An Admin can change either or both passwords.
- PORTAL password is for the chapter sisters to log in.
- ADMIN password is for those who will make edits to the local chapter page.
- Once you have made a change, click the Save icon.
Local Chapter Home Page

- Chapter letters will appear at the top right of the screen as:
  Welcome Chapter AP

- If a logo has been uploaded and a message has been typed, these will appear below the welcome.

- After the Administrator uploads documents, these documents will be available as links on the home page.

- Members who log in will see the links for the documents. Clicking on a link will ask if they want to Open or Save it.

- Events will be visible in a list with the date, event name, description and person to contact. When the end date is past, the event will drop off automatically.
Local Chapter Home Page Example

Welcome Chapter CM Sisters! This is the place where you can download local chapter documents and see our events.

Documents

<table>
<thead>
<tr>
<th>Name</th>
<th>Date uploaded</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASC Board 2010.jpg</td>
<td>6/28/2010</td>
</tr>
<tr>
<td>ASC Executive Board Directory.doc</td>
<td>6/28/2010</td>
</tr>
<tr>
<td>ASC Executive Board Directory.pdf</td>
<td>6/28/2010</td>
</tr>
</tbody>
</table>

Events

<table>
<thead>
<tr>
<th>Name</th>
<th>Dates</th>
<th>Description</th>
<th>Contact</th>
<th>Statewide?</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.I.L Picnic Social</td>
<td>8/14/2010-8/14/2010</td>
<td>Our annual summer social</td>
<td>Carol McDougald (987-654-3210)</td>
<td>No</td>
</tr>
</tbody>
</table>

Admin Password: [blank] [Login]
Finishing

- Be sure and click the exit admin mode link to see the finished home page.
- You can either Logout of the portal or click on the link to go to your state website.
- The admin should now tell the chapter how to come to the website and log in.
  - Website address: www.localchapterpeo.org
  - Login:
    - Choose your state
    - Choose your chapter
    - Enter the PORTAL password the admin set up
State Events page

- Events that are checked to be displayed on the state events page will be displayed automatically on the state website event page.
- Format will be the same as the local chapter home page with the addition of the Chapter letters.
- Events will be listed in ascending order by date; those coming up first will be listed at the top and the others will follow.
Support and Billing

- This service is offered by Wallace Computing Solutions, LLC and WebReliance, Inc.

- Questions about your account or support in general can be directed to:
  Christine Wallace  
  christine@wallace-computing.com  
  513-494-2095  
  Wallace Computing Solutions, LLC

- This service is offered on a yearly basis to local chapters who wish to sign up.