

Portal Prodigy[™]
Directories Features in Detail

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www.portalprodigy.com

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1.1 Introduction

Create public contact directories for an unlimited number of categories such as Board of Directors, Members, Users, Experts, Media Contacts, Service Technicians, Sales Reps, etc. Individual directory access may be constricted to visitors with specified security permissions and display only information specified in their administrative setup. Includes sophisticated directory record search interface.

Ideal for creating Yahoo like yellow pages and white pages.

Directories benefits include:

- Create an unlimited number of directories based on contact type, security group or special interest.
- Individual directories can be made public or secured by login and password.
- Visitors can search directories by contact name, city, state, organization name and special interests.
- Control which data is displayed in director search results list.
- Provide link from search results list to detailed profile.
- Customize each directory to display as limited or detailed individual contact profiles as desired.
- Profiles can be configured to contain links from individual contact profiles to other feature details and reports such as Biography, Event Registrations, Exchange Records, Press Releases, Payments, Product Orders, Responses to Legislative calls to action, surveys and signup data.

Some of the components, fields and settings of the Directories feature, discussed in detail in this chapter, are:

Directory Management

Page

Directory Name Field

Fields to Display in Directory

Checkboxes

Include Hyperlink to Profile

Box

Edit Profile Page Link

Contact Selection Boxes

Active Selection Field

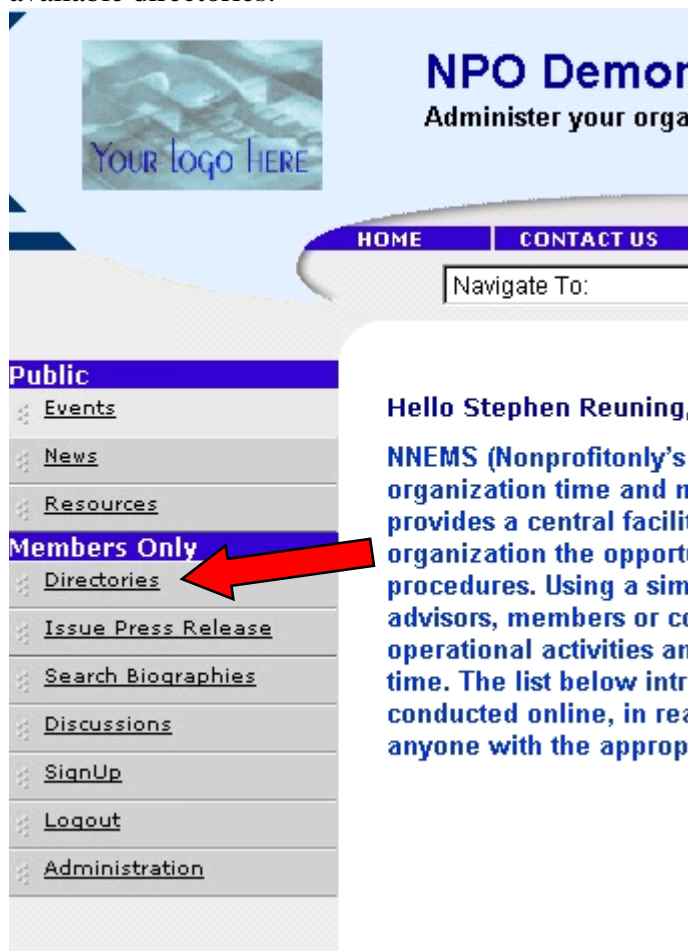
Private Selection Field

Edit Profile Page

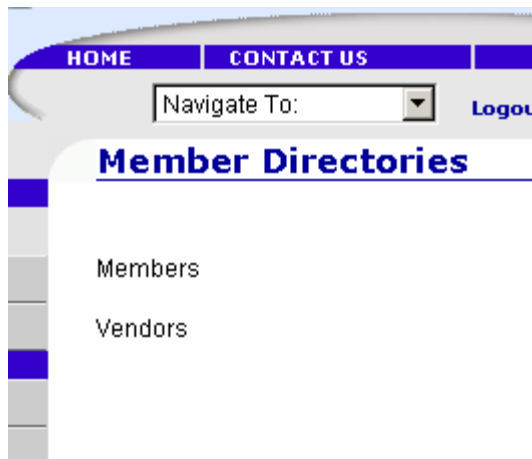
1.2 The Visitor Experience

PORTALPRODIGY can maintain an unlimited number of directories such as Member Directory, Vendor Directory, Sponsor Directory, Team Manager Directory, etc. Administration sets up a Directory Template once and the system automatically updates the directory any time a Contact Record is added or updated. Directories can be public or private subject to password security as set by Administration.

Visitors can click on the Directories link on the organization's home page to access the list of available directories.



Clicking on the name of a Directory accesses the Directory Search Page.



The visitor can enter search criteria into any of the fields to narrow down selections from the directory or enter no criteria and click on the Search button to see all the listings in the selected directory.

Search Members




| Search Criteria | |
|---|---|
| First Name: | <input type="text"/> |
| Last Name: | <input type="text"/> |
| Home City: | <input type="text"/> |
| Home State: | <input type="text" value="All"/> |
| Office/Company Name: | <input type="text"/> |
| Office City: | <input type="text"/> |
| Office State: | <input type="text" value="All"/> |
| Special Interest Groups: <small>Use Ctrl key to select multiple interest groups.</small> | <div>All Finance and Accounting Health and Welfare Production</div> |
| Items Per Page: <input type="text" value="10"/> | |

Search

By clicking on the View Profile link in the Found Directories Listing Page, visitors can visit a more detailed profile for the selected listing.

Found Members

| Page 1 of 1 | | | Total matches: 4 |
|-------------|-----------|--------------------|------------------------------|
| FirstName | LastName | OfficePhone | ProfileLink |
| Anita | Giagrande | 555.555.7676 | View Profile |
| Pamela | Mace | 555.555.9879 x 555 | View Profile |
| Dana | Pallack | 555.555.0968 | View Profile |
| Stephen | Reuning | 555.555.5555 x 201 | View Profile |

 Print  Clear  Close

The visitor is directed to the Profile Page which displays according to the template customized by Administration during Directories Setup. The profiles page can include links to feature records related to the contact represented including Biography, Press Releases, Event Registrations, Exchange Records, Payments, Product Orders, Responses to Calls to Action, and Surveys.

Member Profile

| Details | |
|---------------------------|------------------------|
| First Name: | Stephen |
| Last Name: | Reuning |
| Office Email: | smr@nonprofitonly.com |
| Office Web: | |
| Office Phone: | 555.555.5555 |
| Office Address 1: | 510 Horizon Ctr |
| Office Address 2: | |
| Office City, State, Zip : | Robbinsville, NJ 08691 |

Special Interests:

- Health and Welfare
- Finance and Accounting

[Biography](#)
[Press Releases](#)
[SignUp](#)


 Close

Of course, it may not be prudent to activate the links to all these items because some contain private data. But, the links can be activated and password protected to allow only select visitors access.

Member Profile

| Details | |
|---------------------------|----------|
| First Name: | Stephen |
| Last Name: | Reuning |
| Office Email: | smr@no |
| Office Web: | |
| Office Phone: | 555.555. |
| Office Address 1: | 510 Hori |
| Office Address 2: | |
| Office City, State, Zip : | Robbins |


[Biography](#)
[Event Registrations](#)
[Exchange Records](#)
[Press Releases](#)
[Payments](#)
[Product Orders](#)
[Responses to Call to Actions](#)
[Surveys](#)
[SignUp](#)

 Close

Visitors can click on a Profile link, for example Press Releases, and access a list of the contact's activities in that feature.

Press Releases For: Stephen Reuning

| | |
|--|----------------------------|
| Software Enhancements Completed | 06/05/2003 |
| NPO Implements Site for ACNJ | 06/04/2003 |
| Personnel Consultants Choose NNEMS | 06/04/2003 |

 Close

Clicking on a title in the Feature Access List displays the related item such as the press release below.



510 Horizon Ctr
Robbinston, NJ
08691
(555) 555-9000

Press Release

For Immediate Release

Date: June 10, 2003
Contact: Stephen M. Reuning

The Non Profit Only, Inc. reported today the implementation of its Press Release Feature. According to J. Brock Miller, the company's Chief Technology Officer, "This enhancement will allow the members of organizations using our Nonprofit Enterprise System to advance their public relations program with ease."

According to the company, after a one time setup, companies and individuals belonging to organizations using NNEMS, Non Profit Only's web based nonprofit organization administration tool, can enter press release copy via their internet browser and within minutes the release is delivered to the appropriate media contacts stored in the NNEMS database.

Non Profit Only, Inc. (NPO) is a New Jersey corporation which provides services and software applications to nonprofit organizations and those who administer them. NPO's launch product, The NPO Nonprofit Enterprise Management System (NNEMS), is a web server based software application, which allows users to execute most nonprofit organization management and administrative activities from internet browsers located anywhere. Within hours of purchase, any organization can establish a powerful management system and internet presence and be broadcasting press releases, signing up members and constituents, collecting dues, advertising products, taking orders, advocating issues, lobbying government representatives, holding discussions, announcing events, delivering news, exchanging job notices and job candidates, providing advice from their knowledgebase, soliciting donations, scheduling meetings, booking resources, and conducting surveys — all for less than \$4,000. The system is designed around the very specific needs of trade associations, churches, temples, clubs, volunteer emergency services, advocates, tenants associations, amateur sporting teams, leagues, professional societies, foundations, civic organizations, parent teacher associations, public libraries, art and theater groups, political parties, action committees, unions, alumni institutions, youth groups, schools and scouts. Acceptance of NPO's software product immediately positions NPO to sell its secondary product offering, NPO Administrative, Management and Support Services (NAMSS), which are made extremely efficient and low cost through the use of NNEMS.

Website Address: <http://www.nonprofitonly.com>

Contact Email Address: info@nonprofitonly.com,

Link to Biography: [Biography](#)

1.3 Components

The following components are used to manage and maintain Directories.

1.3.1 Directory Management Page

Directories Management is accessed from the Administration Menu by clicking on the add or Browse Directories icon.



Add Icon - Activates the Add a New Directory function.



Browse Icon - Accesses the Directory List.



Activates the Reports Menu.

The Directory Management page is used to create or update a directory.

Member Directory Management

The screenshot displays the 'Member Directory Management' page. At the top, there's a 'Management' tab. Below it, the 'Directory Name' field contains the text 'Members'. A section titled 'Check each data field you want to display in the Directory:' contains a grid of checkboxes for various fields. The 'First Name' and 'Last Name' checkboxes are checked. At the bottom, the 'Include hyperlink to profile' checkbox is also checked, and there is a link labeled 'Edit Profile Page'.

- **Directory Name Field** - Administration enters the name of the directory into the Directory Name Field.

- **Fields to Display in Directory Checkboxes** - Directories display as list tables with each row representing a contact and each column a data field. It is recommended that the Administration select a limited number of fields to display so that the columns do not extend beyond the left side of a visitors browser window. By including a Hyperlink to Profile, visitors can be afforded a link to see more information related to a selected contact.
- **Include Hyperlink to Profile Box** - Checking the Include Hyperlink to Profile Box configures the directory table to have a *View Profile* link.
- **Edit Profile Page Link** - Clicking the Edit Profile Page link accesses the Profile Management Page where Administration can configure what data and hyperlinks will be displayed on the profile page viewed by visitors to the directory.
- **Contact Selection Boxes** - Generally, a Directory is configured to display contacts of a specific variety. Some examples of different directories are: Member Directory; Directory of Board of Directors; Donors Directory; and Sponsor Vendor Directory. A directory only displays contacts whose contact record matches the filter criteria checked in the Contact Section Form.

Contacts can be filtered by Contact Type, Special Interest Group, or Security Group. Selecting down a column affects an “OR” search while selecting across columns affects an “AND” search. For example, selecting the boxes Client, Contractor and Contributor would display in the directory contacts that are clicked as Client OR Contractor OR Contributor and not necessarily a member of each Contact Type. On the other hand, checking Member, Finance and Accounting, and Admin would display in the directory contacts that are Members but must also be in the Financial and Accounting Special interest Group and must have Admin privileges.

Check each Contact Type or Group whose members you want to display in the Directory:

| Contact Type | Special Interest | Security |
|--|---|-----------------------------------|
| <input type="checkbox"/> Client | <input type="checkbox"/> Finance and Accounting | <input type="checkbox"/> Admin |
| <input type="checkbox"/> Contractor | <input type="checkbox"/> Health and Welfare | <input type="checkbox"/> Employee |
| <input type="checkbox"/> Contributor | <input type="checkbox"/> Production | <input type="checkbox"/> Users |
| <input type="checkbox"/> Employee | | |
| <input type="checkbox"/> LRCA | | |
| <input type="checkbox"/> MailingList | | |
| <input type="checkbox"/> Manufacturer | | |
| <input type="checkbox"/> Media | | |
| <input checked="" type="checkbox"/> Member | | |
| <input type="checkbox"/> NonProfit | | |
| <input type="checkbox"/> Prospect | | |
| <input type="checkbox"/> Vendor | | |
| <input type="checkbox"/> Volunteer | | |
| <input type="checkbox"/> VolunteerInterest | | |

- **Active Selection Field** - The Active selection field deactivates or activates the specific directory.
- **Private Selection Field** - The Private selection field is used to password protect the specific directory. Selecting *Yes* activates the Security Group list form. By assigning Security Groups, only contact within the checked Security Group can visit the directory provided they are logged into the site.

| Record | | |
|--------------|---|------------|
| Created By: | Stephen Reuning | 06/06/2003 |
| Modified By: | Stephen Reuning | 06/07/2003 |
| Active: | <input checked="" type="checkbox"/> Yes | |
| ChapterID: | 1 | |
| Private: | <input checked="" type="checkbox"/> Yes | |

To limit access to the directory, check Private, then check each Security Group to be granted access:

| Security Groups |
|---|
| <input type="checkbox"/> Admin |
| <input type="checkbox"/> Employee |
| <input checked="" type="checkbox"/> Members |
| <input type="checkbox"/> Users |
| <input type="checkbox"/> Visitors |

Save Delete Print Cancel Close

1.3.2 Edit Profile Page

Clicking on the Edit Profile Link on the Directory Management Page accesses the Profile Management page. Administration determines what data and what links will appear on the directory listing View Profile page.

| Member Profile Management | | | | |
|---|--|---|---|--|
| Management | | | | |
| Check each data field you want to display in the Directory: | | | | |
| <input checked="" type="checkbox"/> First Name | <input type="checkbox"/> Middle Initial | <input checked="" type="checkbox"/> Last Name | <input type="checkbox"/> Prefix | <input type="checkbox"/> Suffix |
| <input type="checkbox"/> NickName | <input type="checkbox"/> Title | <input type="checkbox"/> Profession | <input type="checkbox"/> Home Email | <input checked="" type="checkbox"/> Office Email |
| <input type="checkbox"/> Home Phone | <input checked="" type="checkbox"/> Office Phone | <input checked="" type="checkbox"/> Office Ext. | <input type="checkbox"/> Cell Phone | <input type="checkbox"/> Pager |
| <input type="checkbox"/> Home Fax | <input type="checkbox"/> Office Fax | <input type="checkbox"/> Home Web | <input type="checkbox"/> Office Web | <input type="checkbox"/> Mail To Office |
| <input type="checkbox"/> Mail To Home | <input type="checkbox"/> Home Address 1 | <input type="checkbox"/> Home Address 2 | <input type="checkbox"/> Home City | <input type="checkbox"/> Home County |
| <input type="checkbox"/> Home State | <input type="checkbox"/> Home Zip | <input type="checkbox"/> Home Country | <input type="checkbox"/> Company Name | <input checked="" type="checkbox"/> Office Address 1 |
| <input checked="" type="checkbox"/> Office Address 2 | <input checked="" type="checkbox"/> Office City | <input type="checkbox"/> Office County | <input checked="" type="checkbox"/> Office State | <input checked="" type="checkbox"/> Office Zip |
| <input type="checkbox"/> Office Country | <input type="checkbox"/> Comments& Requests | <input type="checkbox"/> Notes | <input checked="" type="checkbox"/> Special Interest Groups | |

The Directory Profile can link to lists of the contact's activities in each of the features: Biography, Press Releases, Event Registrations, Exchange Records, Payments, Product Orders, Responses to Calls to Action, and Surveys. It is likely that most of such information should be kept private and available to Administrative visitors only. Clicking on a Feature Title Box causes a link to be displayed on the directory profile page. Clicking on the Private Box sets the requirement that a visitor be a member of a permitted Security Group and logged on in order to access the link. Highlighting one or more Security Group titles in the Security Group Selection Box determines which contacts can access.

| Contact Activities | | |
|---|----------------------------------|---|
| Check each hyperlink to include in Profile Page | | |
| <input checked="" type="checkbox"/> Biography | <input type="checkbox"/> Private | <div>Admin Employee Users</div> |
| <input checked="" type="checkbox"/> Event Registrations | <input type="checkbox"/> Private | <div>Admin Employee Users</div> |
| <input checked="" type="checkbox"/> Exchange Records | <input type="checkbox"/> Private | <div>Admin</div> |