

LCO Portal User Guide

The LCO Portal is a replacement for the [LCO Membership](#) feature on ThinkHDI.com. For much of 2013, the LCO Membership feature will remain in place while the chapters begin to use the new portal.

This document shows you how to use the new portal on ThinkHDI.com.

- [Requirements](#) on page 2
- [Access the Portal](#) on page 2
- [Control Access to the Portal](#) on page 4
 - [Define Roles](#) on page 4
 - [Add a Role](#) on page 6
 - [Rename a Role](#) on page 7
 - [Delete a Role](#) on page 8
 - [Assign Roles to Chapter Members](#) on page 8
 - [View Users](#) on page 9
 - [Add Users](#) on page 9
 - [Add Roles to a Person](#) on page 12
 - [Remove a Role from a Person](#) on page 12
- [Manage Information about People](#) on page 12
 - [Search for People](#) on page 13
 - [Search Criteria](#) on page 14
 - [How We Locate People by Zip Code](#) on page 15
 - [Export Contact Details](#) on page 15
 - [View a Person](#) on page 16
 - [Edit a Person's Contact Details](#) on page 18
 - [Add a Person](#) on page 18
- [Manage Meetings](#) on page 20
 - [Data Migration](#) on page 21
 - [View Meetings](#) on page 21
 - [View Meeting Details](#) on page 22
 - [Delete a Meeting](#) on page 23
 - [Add New Meeting](#) on page 23
 - [Set the Meeting Location](#) on page 26
 - [Edit Meeting](#) on page 27
 - [Collect Registrations](#) on page 28
 - [Use Built-In RSVP Feature](#) on page 28
 - [Use Third Party RSVP Feature](#) on page 29
 - [Track Attendance](#) on page 29
 - [Find Person](#) on page 31
 - [Add a New Contact](#) on page 31
 - [Show Meetings in HDI Calendar](#) on page 32

Requirements

In order to use the LCO portal, you must meet one of the following requirements:

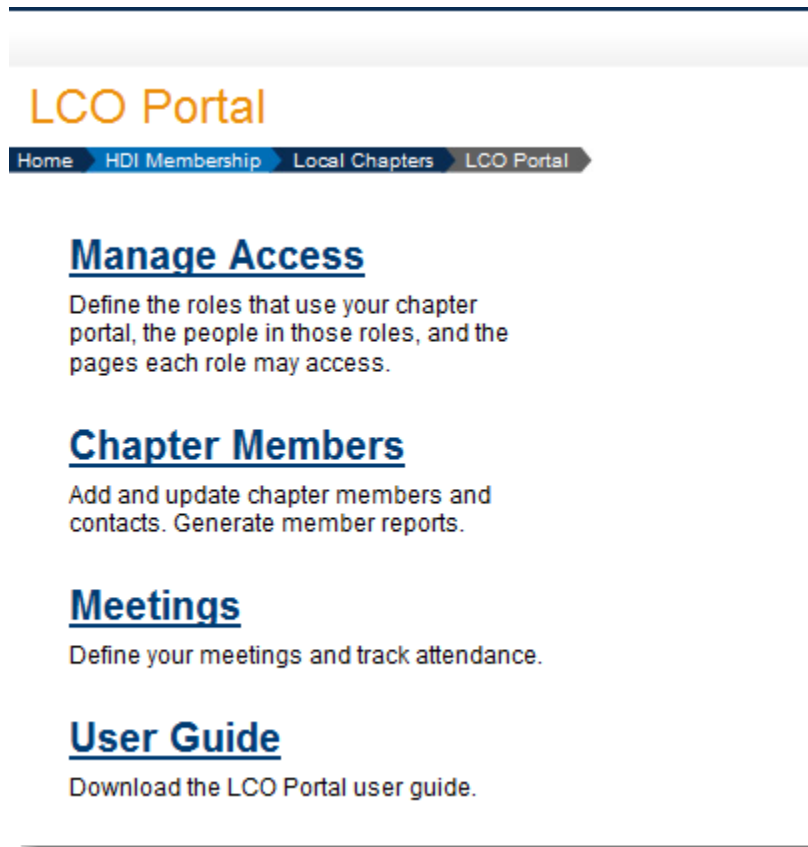
- Currently hold the position of president, VP of membership, or VP of communications within your chapter,
OR
- Have been granted access to the LCO Portal by one of the aforementioned officers.

Access the Portal

The LCO Portal is located at <http://www.thinkhdi.com/membership/local-chapters/lco-portal>.

The path through the menus is **Membership > Local Chapters > LCO Portal**.

You must be logged in before you may access the portal pages. Once you log in, the main portal page shows you the available features.



This document explains how to use each feature.

NOTES:

1. At the time of this writing, the Meetings feature was not yet fully tested and is not included in this document.
2. Later on, you'll see how to control access using roles. Even though a particular role may not have access to a feature, the feature will still appear on this page for people in that role. In other words, the features listed do not change based upon the role of the person viewing the page. People who have access to Members but not Meetings will still be able to click the Meetings link, though they will see a page stating that they don't have access to that feature.

Control Access to the Portal

One goal of the LCO Portal is to give each chapter the flexibility to control who may access the portal and the kinds of data they may access. We want you to be able to delegate the management of data to different people, as you see fit.

When a chapter is set up in the LCO Portal, the president, VP of communication, and VP of membership are given administrative access to the portal. At least one person should retain administrative access.

NOTE: When you are logged into ThinkHDI.com and looking at the Access Management portion of the portal, you will not be able to change your own user record. This is by design. Our goal is to prevent you from accidentally denying yourself access and to prevent somebody from intentionally giving their account more permissions than it should receive.

To see the roles for your chapter and the people assigned to those roles, click on the **Manage Access** link.

Define Roles

By default, each chapter has a portal role named **Admin**. People assigned to the Admin role may access all of the data managed via the portal. By default, the admin role is assigned to the president, VP of communications, and VP of membership.

NOTE: In the portal, you assign roles to people, not to titles. If a new person is elected to the office of president, then the outgoing president should be removed and the incoming

president added to the portal (assuming the outgoing president does not hold another office within the chapter).

You may add new roles as you see fit. The **Roles** tab lists the current set of roles.

Access Management

Home > HDI Membership > Local Chapters > LCO Portal > Access Management

Use this page to control access to your chapter's portal pages.

On the **Roles** tab, click on a role to see which pages may be accessed by people in that role. To add a new role, enter the role name into the **Add Role** textbox and click the **Add** button.

On the **Users** tab, click on each user to see the roles to which they are assigned. To grant a person access to your chapter's portal, enter their email address into the textbox at page bottom and click the **Find Person** button. Once they appear in the list, assign the appropriate role(s).

Roles **Users**

Roles	Pages	Available Pages
Admin	Access Management Add a Contact Add/Edit Meeting Chapter Meetings Chapter Members LCO Portal Meeting Attendees View Meeting View Member	

Manage Roles

- To create a new role, enter its name and click the Add button.
- To rename a role, select it in the Roles list, change the name, and click Save.
- To delete a role, select it in the Roles list and click the Delete button.

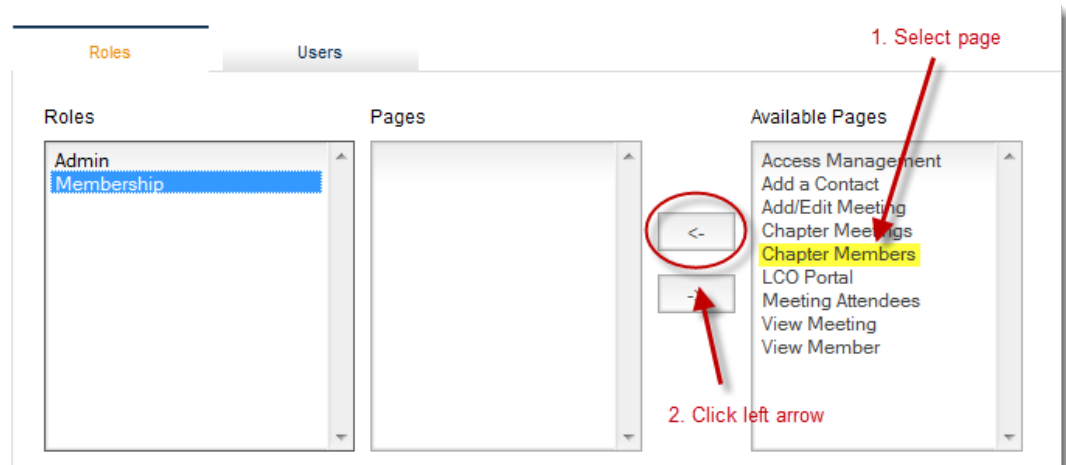
Each role may access one or more pages within the portal. To see a list of pages a role may access, click on the role. The **Pages** list shows the pages the role may access. The **Available Pages** list shows the pages that are inaccessible to that role. The table below lists the purpose of each page.

Page	Purpose
Access Management	Manage roles and role assignments.
Add a Contact	Enter details for a person not yet in the contact database.
Add/Edit Meeting	Add a new meeting or edit the details of an existing meeting.
Chapter Meetings	List and search the chapter meetings.
Chapter Members	List, search, and export chapter members and contacts within a specific geographic range.
LCO Portal	The main LCO Portal page.
Meeting Attendance	Track attendees for a specific meeting.
View Meeting	View information about a specific meeting.
View Member	View information about a specific member or contact.

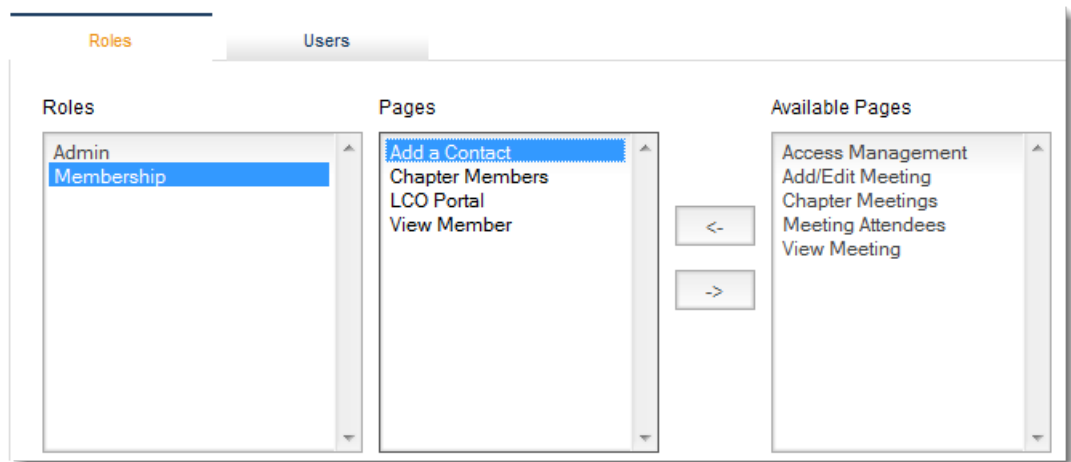
Add a Role

Let's say you want to define a role that focuses specifically on managing chapter member and contact information. To create that role, do the following:

1. Decide upon a role name. For this example, let's use **Membership**.
2. Below the list of roles, enter the name for the role in the text field.
3. Click the **Add** button. The new role should now appear in the list of roles. However, there will be no pages assigned to the role.
4. To assign a page, click the page in the Available Pages list and then click the button showing the left arrow. Your change will take effect immediately (i.e., you do not need to click the Save button again).



5. Assign all pages relevant to the row. In this case, we assigned the pages Add a Contact, Chapter Members, LCO Portal, and View Member.



NOTE: You may not add another role named Admin.

Rename a Role

To change a role's name, do the following:

1. Click the role in the list of roles. The role's name will appear in the text field below the roles list.
2. Change the name as needed.
3. Click the **Save** button. Your change will be saved and you'll see the new role name in the list of roles.

NOTES:

1. You may not rename the Admin role.
2. You may not have two roles with the same name.

Delete a Role

To delete a role, do the following:

1. Click the role in the list of roles. The role's name will appear in the text field below the roles list.
2. Click the Delete button. You will be asked to confirm the deletion.
3. Click OK to delete the role. The role will be removed from the list of roles.

NOTES:

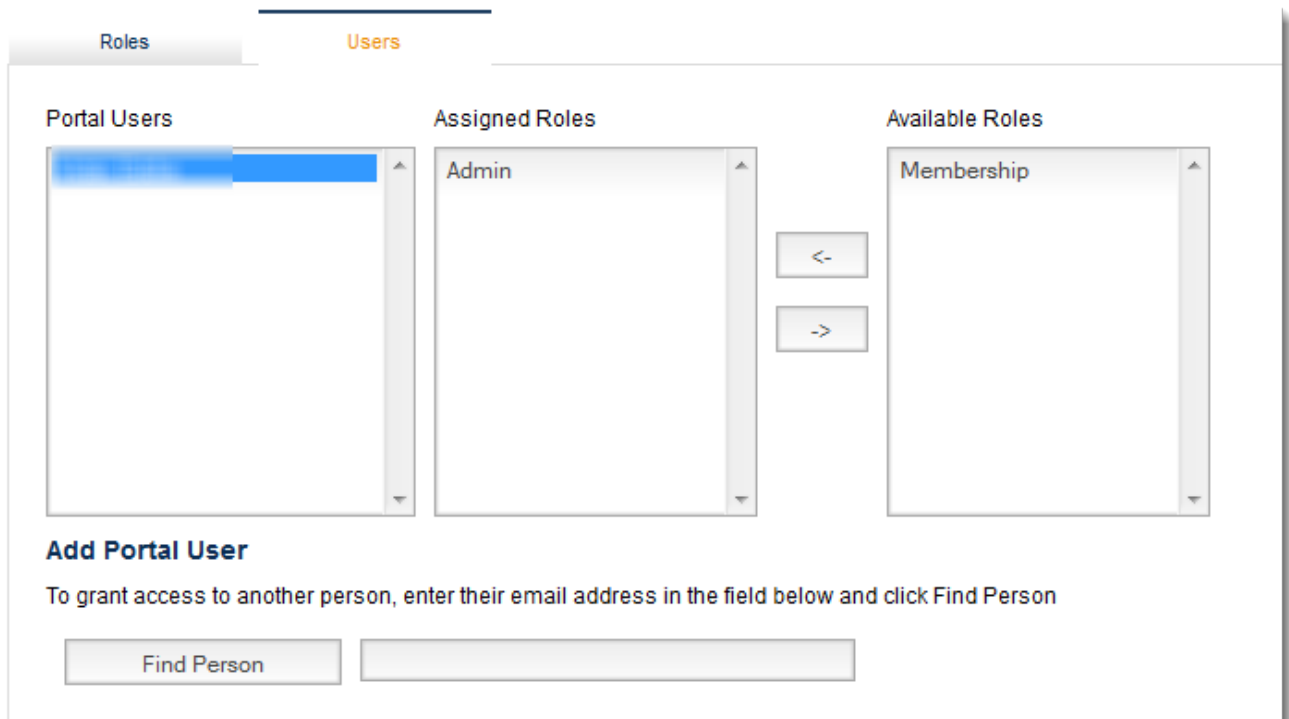
1. The deleted role is automatically removed from any people assigned to the role.
2. The roles aren't actually deleted. If you add a role bearing the same name, it reactivates the deleted role, including any pages and people assigned to that role.

Assign Roles to Chapter Members

Once you have defined the roles, you may assign them to people. You may assign roles only to people who are HDI members and belong to your chapter. The LCO Portal **does not** require them to be assigned offices within the chapter.

View Users

To see the list of people who may access the portal, click on the **Users** tab. In the following screenshot, only one person has access to the chapter's portal and that person has the Admin role. **NOTE:** The screenshots used in this document were created using test data that contains names of real people. Our sole purpose in this document is only to provide examples. In real life, the president, VP of communication, and VP of membership will have the Admin role by default.



To see the roles assigned to a person, click on his/her name. The Assigned Roles list shows the roles assigned to the currently selected person. The Available Roles list shows the roles not assigned to that person.

Add Users

To grant access to another chapter member, do the following:

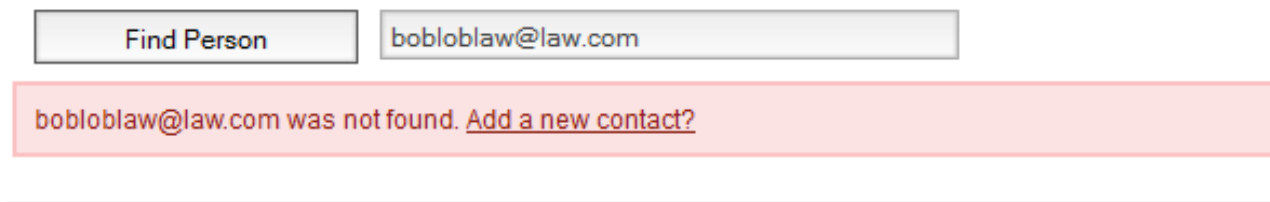
1. Enter his/her email address into the text box below the **Roles** list.
2. Click the **Find Person** button.

The portal searches for the person in the HDI CRM system. It looks at both the primary email address and the secondary email address.

If a contact with a matching email address was not found, you will see a message to that effect. You'll also see a link that lets you add the person to the database. However, that is of limited use if such individuals are not yet members of your chapter.

Add Portal User

To grant access to another person, enter their email address in the field below and click Find Person



The screenshot shows a web form with a 'Find Person' button and a text input field containing 'bobloblaw@law.com'. Below the input field is a red error message box that reads: 'bobloblaw@law.com was not found. [Add a new contact?](#)'

If a matching contact is found but that person is not in your chapter, you'll see another message showing their contact details. We do this so that you can make sure you've got the right person.

Add Portal User

To grant access to another person, enter their email address in the field below and click Find Person

Sorry, but this person is not a member of your chapter

[View More Details](#)

If a matching contact is found and that person is a member of your chapter, you'll see his/her contact details. You will also see links to view more contact details and add the person as a portal user.

Add Portal User

To grant access to another person, enter their email address in the field below and click Find Person

[View More Details](#) [Give Access to Portal](#)

Click the link **Give Access to Portal**. Once you do so, the new member will appear in the list of users. However, they will not yet have any roles assigned.

Add Roles to a Person

Once you have granted a person access to the portal, you must assign that person one or more roles. To assign a role, do the following:

1. Click the person's name in the **Users** list. Any assigned roles appear in the **Assigned Roles** list. Any unassigned roles appear in the **Available Roles** list.
2. In the **Available Roles** list, click the role to be assigned.
3. Click the button that contains the left-pointing arrow. The role will be assigned to the person and the change will take effect immediately.

Remove a Role from a Person

To remove a role, do the following:

1. Click the person's name in the **Users** list. Any assigned roles appear in the **Assigned Roles** list. Any unassigned roles appear in the **Available Roles** list.
2. In the **Assigned Roles** list, click the role to be removed.
3. Click the button containing the right-pointing arrow. The role will be removed from the person.

NOTE: If you remove all roles, that person will no longer have access to the portal.

Manage Information about People

The [Chapter Members](#) page provides you with access to membership and contact details for people within HDI's CRM system. It helps you do the following:

1. Produce a list of current HDI members are associated with your chapter.
2. Generate a list of previous HDI members associated with your chapter.
3. Generate a list of contacts whose mailing addresses are within a certain geographic distance of your chapter's zip code.

The use of this information is governed by the guidelines and policies set forth by HDI and your chapter. You **do not** have access to the following information:

1. People who are not associated with your chapter or within a certain geographic distance of your chapter's zip code.
2. Any data related to how and when a person has engaged with HDI (e.g., purchases, certifications, event attendance, webinar attendance).
3. Information about these individuals' companies.

Search for People

By default, the [Chapter Members](#) page shows a list of the people who are both current HDI members and associated with your chapter. You see ten members at a time and you may move from page to page using a pager control located below the list. When you perform a search, the results are cached in the web server's memory for up to thirty minutes. This means that if an HDI staff person updates the information on a contact, you may not see that change in the search results for up to thirty minutes.

For each person, you see the following:

Column	Purpose
Name and Company	Contains the person's name and company name. To view more details about that person, click on his/her name.
Email	The person's email address. To send the person an email, click on his/her email address.

Phone	Contains the person's primary phone number. To see a secondary phone number, click on the person's name.
Chapter Benefit	<p>If the person has an active chapter membership, this column contains Yes; otherwise, it contains No. Situations where it says No are as follows:</p> <ul style="list-style-type: none"> • HDI membership level does not include a paid chapter membership (e.g., Web Access Membership, HDI Certified Instructor) • HDI membership has expired or never existed
Membership	Identifies the person's HDI membership level. If the person is not a member, then it says Non-Member. If the person is a Non-Member or has a membership that expired, then the text will be red.
Expires	Identifies the date the person's HDI membership expires.
Actions	Contains links to any actions applicable to the person's record. At this time, the only action is to Edit the person's contact details.

Search Criteria

You may search for people by personal name, company name, and email address. Wildcards are optional. To search by wildcard, enter values using an asterisk (*). If you leave a filter field blank then the search assumes you want to see all results (i.e., it will not be filtered by that criterion).

You may also search people by their HDI membership status:

HDI Membership Filter	Results
All	Includes all current and former HDI members associated with your chapter, as well as people whose mailing addresses are within a certain geographic distance of the chapter's zip code.
Current Member	Includes all current HDI members associated with your chapter.

Previous Member	Includes all previous HDI members associated with your chapter.
Never a Member	Includes all people who have never been HDI members and who are within a certain geographic distance of the chapter's zip code.

How We Locate People by Zip Code

HDI's CRM system contains people who have engaged with HDI in some way but who are not yet members. As an aid to you, we show you those people when you filter by **Never a Member** or **All**.

This search is carried out by looking for people whose zip codes are within a 120-mile radius of the chapter's official zip code. You can see your chapter's zip code in the [Local Chapter Directory](#).

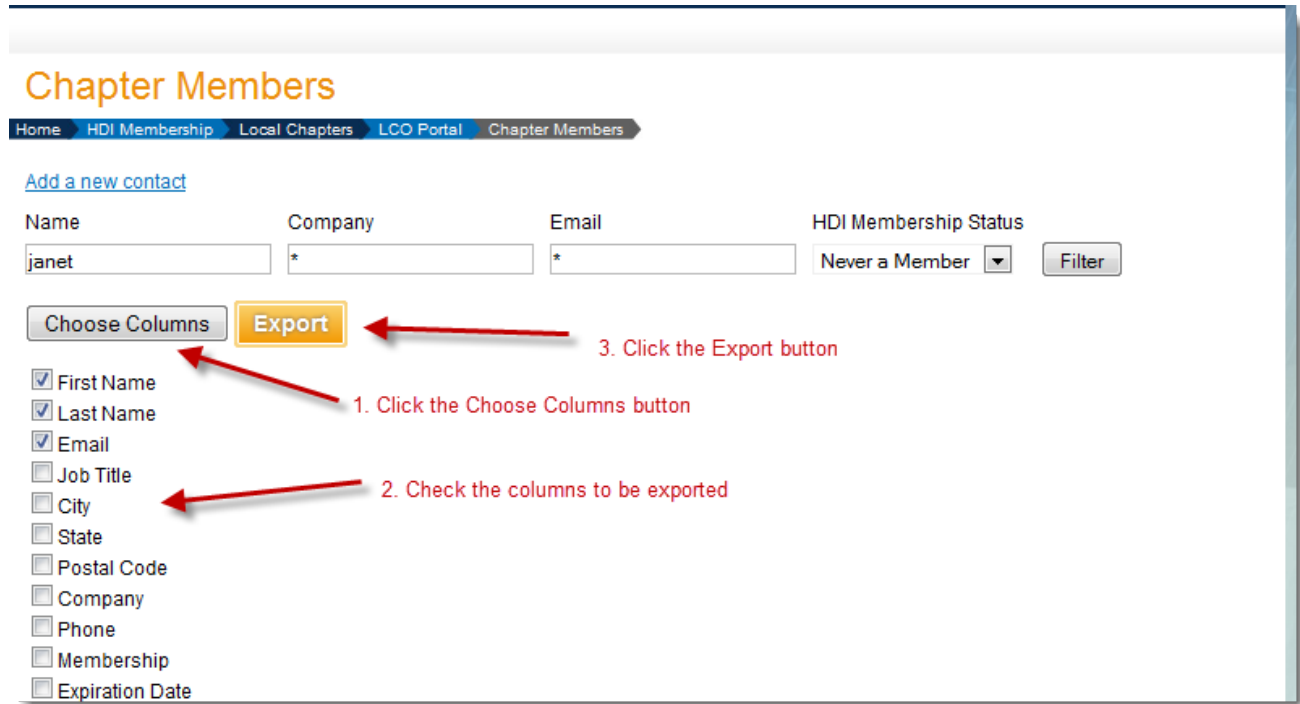
We realize that for some chapters, a 120-mile radius is far too large. We've set up our database in such a way that the radius may be specified per chapter. In the near future, we'll add a way for you to change that setting via this portal.

Export Contact Details

Our intent in providing you with a search page is so that you can identify people to whom you need to send relevant, chapter-specific communications; for example, to build a list of people who should receive the next monthly chapter email, or to identify people who may be interested in attending a chapter meeting.

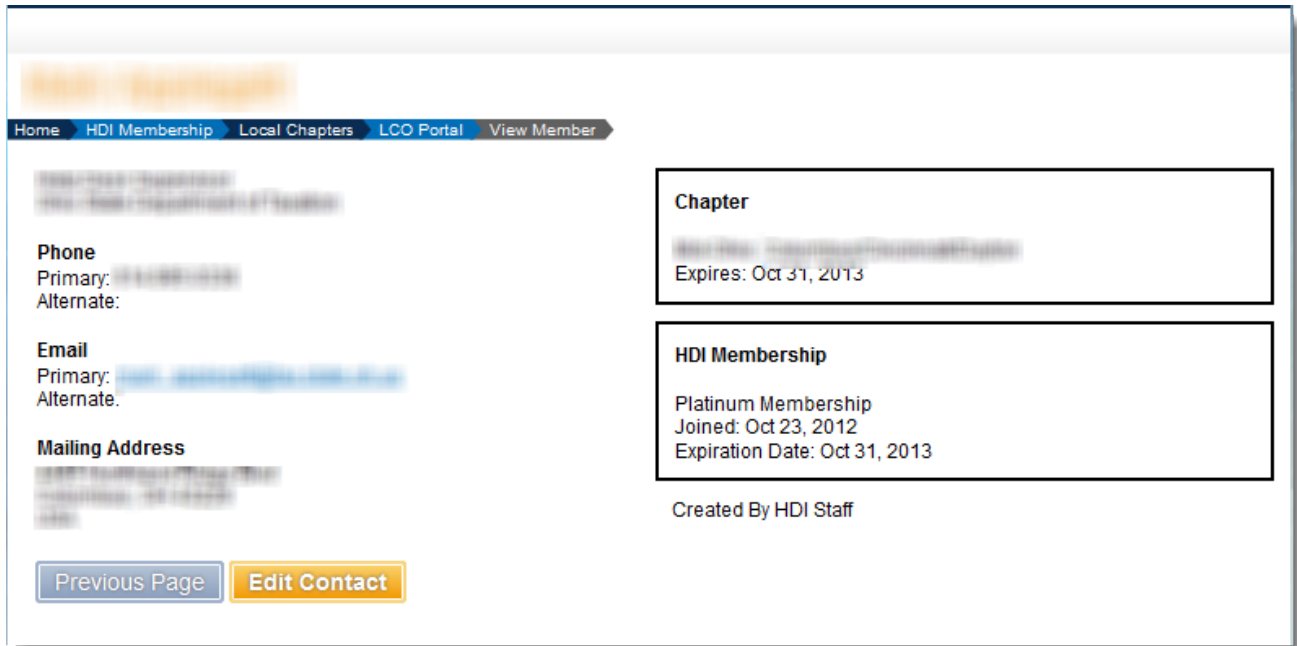
Once you have obtained a list of people using the search criteria, you may export them as an Excel spreadsheet. To export the information, please do the following:

1. Click the **Choose Columns** button. A list of available columns appears and all are selected by default.
2. Choose only those columns you wish to export.
3. Click the **Export** button. The portal builds the file. Your browser asks you to either open or save the file.



View a Person

The Chapter Members page shows a limited set of information about a person. To see a more complete set of contact details, click on their name. When you do so, the View Person page appears.



The information shown for each person includes the following:

- Name
- Job title
- Company name
- Primary and secondary telephone numbers
- Primary and secondary email addresses
- Mailing address
- Chapter name
- The date their chapter membership expires
- Membership level
- The date their membership level expires
- Who entered their record into the CRM system (if the value is HDI Staff, then it was entered through the website or by HDI staff)
- Who last updated the record in the CRM system

If the person has given you updated information, such as a new job title or email address, click the **Edit Contact** button. You will go to a page where you may update the person's contact details.

Edit a Person's Contact Details

The Edit page lets you change the following information:

- Primary and secondary email addresses (with exceptions)
- Name
- Company name
- Job title
- Professional category (e.g., Internal Support, External Customer Support, Blended)
- Primary and secondary phone number
- Mailing address

Because any changes you make are immediately applied to the HDI CRM system and have an effect upon HDI's communication with people, please use discretion when making changes.

If a person **has never** logged into any of the HDI websites, you may change their email addresses and any other information presented on this page.

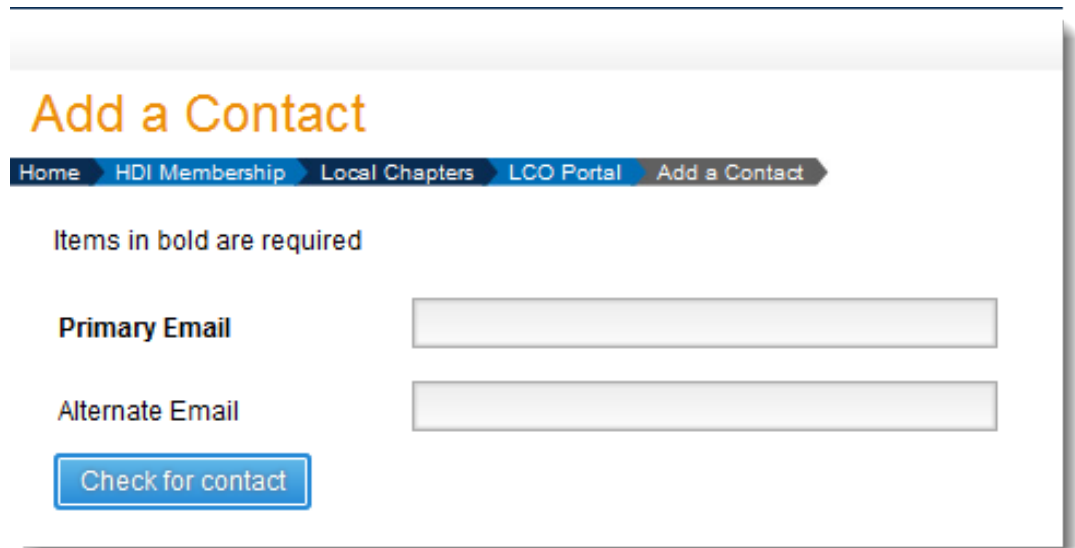
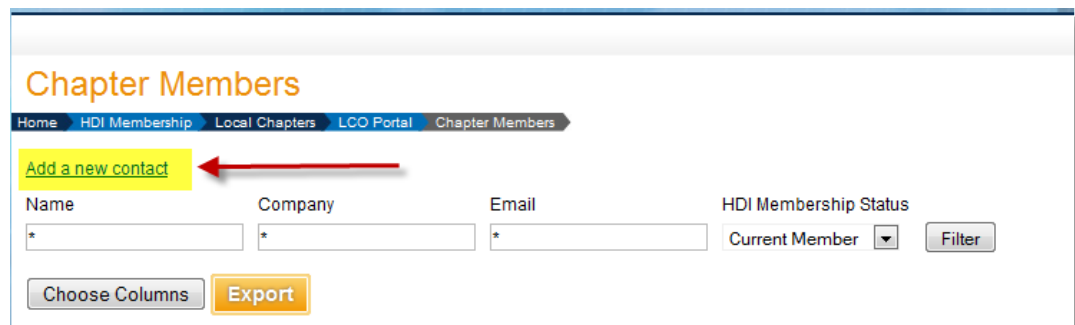
If a person **has** previously logged into any of the HDI websites, you are not allowed to change their email addresses. If they need to change their email address then they must do so by logged into the website and going to the Edit Profile page. However, you may update their phone number, mailing address, and other items present on the page. When you save your changes, they will receive a confirmation email listing their current profile details.

Add a Person

If you encounter a person who is not yet listed in HDI's CRM system, you may add that person to the database; for example, if a person attends a chapter meeting and gives you consent to contact him/her.

To add a person, please do the following:

1. On the Chapter Members page, click the **Add a new contact** link. You are redirect to a page displaying two empty fields for email addresses.



2. Because a contact may be in the database, we ask you to first enter the email address so that we can check for existing contact records. Enter the person's email address into the first email address field. If you have an alternate email address for the person, enter that one into the second field.
3. Click the **Check for Contact** button.
4. If a record containing either email address exists, you'll see a message to that effect. It also provides you with a link to the details on file for that email address.

Add a Contact

Home > HDI Membership > Local Chapters > LCO Portal > Add a Contact

Items in bold are required

Primary Email

Alternate Email

[Check for contact](#)

A contact with a matching email address is already in CRM. [View their information](#)

5. If there are no records matching either email address, then the contact data entry fields appear. Enter the required information and click the **Save** button.

NOTE: In this iteration, we require you to enter the following information for a contact in order for it to be saved to the CRM system:

- Name
- Email address
- Company name
- Job title
- Mailing address
- Phone number

Manage Meetings

Use the Manage Meetings feature to track information and attendance for your chapter's meetings. Your meetings will appear in HDI's [meetings and events calendar](#).

Data Migration

The LCO Portal replaces **LCO Membership**, a legacy web application written some years ago. It too allowed you to enter information about your meetings as well as who attended. . In the near future, the LCO Membership application will be disabled.


If you entered meeting and attendee information into LCO Membership, that data was migrated into the LCO Portal. The conversion was carried out as follows:

- Each meeting in LCO Membership was converted into an LCO Portal meeting.
- If a location was specified for the meeting then the migration tried to find a reasonable match in HDI's CRM. If found it used that location otherwise it tried to add a new location to CRM.
- If the meeting did not have a location specified then the meeting location in LCO Portal was set to the HDI office in Colorado Springs.
- For each attendee:
 - If the attendee did not have the minimum required information (i.e., email address, first name, last name) then the attendee was not migrated to the LCO Portal.
 - If a contact record with matching email address was found in HDI's CRM, that contact was marked as an attendee of the meeting.
 - If a contact record with matching email address was **not** found, a new contact record was inserted into HDI's CRM and the contact was marked as an attendee of the meeting.

View Meetings

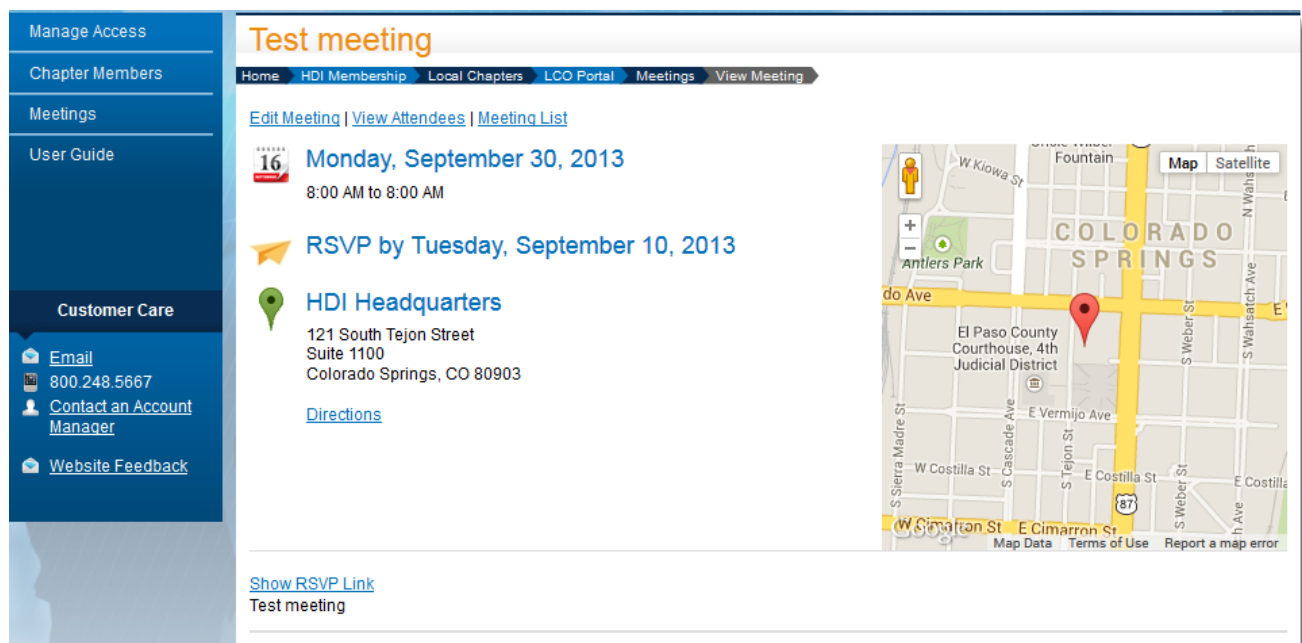
The meetings page shows a summary of your meetings, starting with the most recent meeting. This page shows the following information for each meeting:

Column	Purpose
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	To permanently delete the meeting, click this icon.
Meeting Date	Shows the start date and time of the meeting.
Title	The title of the meeting, as seen by the public. To view the meeting as the public will see it, click the title.
RSVPs	The number of people who have RSVP'd for the meeting. If you are not using the LCO Portal's RSVP functionality then this value will always be zero.
Attendees	The total number of people who attended the meeting. This number will be zero until you mark attendance.
Action	Contains hyperlinks for editing a meeting and viewing the list of attendees.

View Meeting Details

If you would like to see the meeting's information as the public will see it, click the meeting title. You are redirected to a page that shows the meeting title, when it occurs, description, location, and Google map.



The screenshot shows the 'View Meeting' page for a 'Test meeting'. On the left is a navigation sidebar with links for 'Manage Access', 'Chapter Members', 'Meetings', 'User Guide', and 'Customer Care' (including Email, 800.248.5667, Contact an Account Manager, and Website Feedback). The main content area features the meeting title 'Test meeting' and a breadcrumb trail: Home > HDI Membership > Local Chapters > LCO Portal > Meetings > View Meeting. Below the title are links for 'Edit Meeting', 'View Attendees', and 'Meeting List'. The meeting details include a calendar icon with the number 16, the date 'Monday, September 30, 2013', and the time '8:00 AM to 8:00 AM'. An arrow icon indicates the RSVP deadline: 'RSVP by Tuesday, September 10, 2013'. The location is 'HDI Headquarters' at '121 South Tejon Street, Suite 1100, Colorado Springs, CO 80903', with a 'Directions' link. A Google map on the right shows the location in Colorado Springs, with a red pin at the intersection of E Vermijo Ave and S Tejon St. At the bottom left, there is a 'Show RSVP Link' button and the text 'Test meeting'.

To edit the meeting, click the **Edit Meeting** link.

If you have already sent an invitation to your members and want to see who has RSVP'd, click the **View Attendees** link. If the meeting has already occurred, you can also use View Attendees to see who attended the meeting.

To return to the meeting list, click the **Meeting List** link.

To obtain directions for the meeting, either click the **Get Directions** link or click the red marker on the Google map. If you click the red marker, a small window appears containing a link to **Get Directions**. Clicking on either link will open a Google Maps page in a new browser tab.

If you want to send out an RSVP link in an email to your chapter members, click the hyperlink **Show RSVP Link**. It is located just above the meeting description. When you click it, it shows the hyperlink that you can copy and paste into your email.

Delete a Meeting

To permanently remove a meeting, click the red circle containing the white X. It is located at the very left of the meeting's row. You will be prompted to confirm the deletion. Once the meeting is deleted, all information and attendance data will be permanently removed from the database.

Add New Meeting

To add information about a meeting, go to the Meetings page and click the **Add New Meeting** link. You are redirected to the meeting data entry form.

Add/Edit Meeting

Home > HDI Membership > Local Chapters > LCO Portal > Meetings > Add/Edit Meeting

[Return to meeting list](#)

Meeting Title

Show on Calendar and Allow Registrations?

Start Date

End Date

RSVP Deadline

Register URL

Description

Location

Online Meeting (Check if Online, Uncheck to search for an existing location or to add a new location.)

Enter zip code to search

Enter data for the following fields:

Field	Notes
Meeting Title	Enter the publicly-visible title of the meeting.
Show on Calendar and Allow Registrations?	<p>If you are ready for this meeting to appear on the HDI calendar and ready to take registrations, check this option. Otherwise, leave it blank.</p> <p>IMPORTANT: If this option is disabled, you cannot collect RSVPs for the meeting.</p>
Start Date	Set the start date and time of the meeting.
End Date	Set the end date and time.
RSVP Deadline	Enter the date by which RSVPs must be received. RSVPs will be accepted through the end of the specified day.
Register URL	If you are using a third party system to manage your event registrations, such as EventBrite, please insert that system's registration URL into this field. The register hyperlink on the calendar entry and the meeting detail page will link to this URL.
Description	Enter the information about the meeting that you want to make available to the public.
Location	<p>Use this section to identify the geographical location of the meeting. See the section named Set the Meeting Location for more details.</p> <p>If the meeting is online (i.e., no physical location), check the Online Meeting option.</p>

After you have entered details for the meeting, click the **Save** button. You are redirected back to the meeting list.

Set the Meeting Location

If your meeting is virtual and has no physical location, check the **Online Meeting** option.

If your meeting has a physical location, you may select a location that's already in HDI's CRM or enter a new location.

To search for an existing location, enter the zip code of the meeting venue into the field provided and click the **Search** button. Any locations found are listed below the search field. If you find a match then click it. The location details appear. Please review them and make sure this is the correct location. If the location is correct but you see a problem with any piece of the data, please notify HDI of the problem via the link **Report a problem with this location**.

To add a new location, click the **Add New Location** button. A new location form appears. Please fill in the information. Once you click the **Save** button, the location will be stored in HDI's CRM and associated with the meeting.

Location

Online Meeting (Check if Online, Uncheck to search for an existing location or to add a new location.)

Enter zip code to search

[Hide Details](#)

Name

Address 1

Address 2

City

State

Country

Zip code

[Report a problem with this location](#)

Edit Meeting

If you need to change a meeting, please take one of the following actions:

1. Go to the meeting list, locate the meeting, and click the **Edit** link in the Actions column.
2. On the View Meeting page, click the **Edit Meeting** link.

Make the required changes and click the **Save** button.

Collect Registrations

If you want to collect registrations for your meetings, you may either use the portal's built-in RSVP feature or use a registration/RSVP feature provided by a third-party system. You may choose either path on a per meeting basis.

Use Built-In RSVP Feature

For any meeting, you may obtain an RSVP link. If you put the RSVP link into an email and a recipient clicks the link, they will go to a page on the ThinkHDI.com website. The page provides information about the meeting and tells them they have been registered.

Notes:

1. This feature does not provide a way for a person to say they are "NOT" attending a meeting.
2. If you need to collect a fee for the meeting, this feature **does not** provide you with a way to do so.

To obtain the RSVP URL for a meeting, do the following:

1. Go to the Meetings List page and locate the meeting.
2. Click the meeting's title. You are redirected to the meeting's detail page.
3. Just above the meeting description, look for a hyperlink with text "Show RSVP Link". Click the link. You see the meeting's RSVP link.

[Show RSVP Link](#)

```
http://stage.thinkhdi.com/membership/local-chapters/meeting-rsvp.aspx?id=eVNsYjN5UW5yNUw0TDRIshUrRUZMWHJjLy84dG9FQIFndIFBYjRYNXF4bHA5YzdMUkltbmE4VDZQRmVGWXRvRA2
```

Test meeting

4. Select and copy the link.

Use Third Party RSVP Feature

If you have your own meeting registration system and it provides a URL for registrations, edit the meeting and enter the URL into the **Registration URL** field.

If a person views your meeting in the HDI calendar, they will see a **Register Now** link. When they click the link, they will be redirected to the third party URL.

Track Attendance

The Meeting Attendees page shows the people who have RSVP'd and/or attended a meeting. RSVPs appear on the page only if you are using the built-in RSVP feature. When people click the RSVP link, they are marked as a person who has registered for the meeting.

To view the attendees page, please do the following:

1. Go to the meeting list
2. Locate the meeting
3. Click the **Attendees** link in the **Action** column.

The attendees are listed in alphabetical order by last name.

Meeting Attendees

Home > HDI Membership > Local Chapters > LCO Portal > Meetings > Meeting Attendees

[Back To Meeting](#) | [Meeting List](#)

COL 2013-03-15







When: Mar 15, 2013 8:00 AM - 8:00 AM

Location:

10000
 10000
 10000

of RSVPs: 29
lacking RSVPs: 0
Total: 29
attended: 0

 [Download Excel](#)

Remove	Name	Email	RSVP	Attended	Membership Level	Expiration Date
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Local Chapter Membership	May 31, 2014
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Team Package	Jul 31, 2014
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Non-Member	N/A
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Local Chapter Membership	Sep 30, 2013
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Non-Member	N/A
	[Redacted]	[Redacted]	Yes	<input type="checkbox"/>	Non-Member	N/A

The columns shown on this page are as follows:

Column	Purpose
Remove	To remove the person from the meeting, click the red circle containing a white X.
Name	Shows the person's last name and first name.
Email	Click this link to send the person an email.
RSVP	Indicates whether they have RSVP'd.
Attended	Indicates whether they attended the meeting. Before the meeting, this column will display No for all registrants.

Membership Level	Displays the person's current HDI membership level. Use this data to verify people other than guests have an HDI membership.
Expiration Date	Displays the date the person's HDI membership expires. If the person is not an HDI member then this column contains the text <i>N/A</i> .
Mark Attended	If a person attends the meeting, click this link to mark them as having attended. Once they are marked this way, the link text changes to Mark Not Attended .

Find Person

If a person shows up for the meeting but they did not register, scroll down the page until you see a text box and a **Find Person** button. In the text box, enter one of the following:

- email address
- first name and last name
- last name, first name

Click the **Find Person** button. The page searches CRM and displays the matching contacts. Review the information given and add the correct person as an attendee.

Add a New Contact

If a person shows up for the meeting and they are not in the HDI CRM, click the **Add a new contact** link. You are redirected to a page where you can enter their information. After you save their contact details, you return to the attendees page. Use the **Find Person** feature to locate them by email address and add them to the meeting.

Show Meetings in HDI Calendar

The [HDI Calendar](#) pulls together information about all the HDI-related meetings. It includes the following types of meetings:

- Conferences
- Local chapter meetings
- Forum meetings
- Training classes
- Webcasts
- Ad hoc meetings

If you check the Visible flag on a meeting, it appears in the HDI calendar. When a person sees the meeting, they are provided with links to obtain more information and to register.

If they click the link for more information, they are redirected to a page showing the meeting title, date, time, location, and description.

If they click the link to register, they will either be redirected to a third party registration system (if you provided a registration URL for that system) or they will be registered using the built-in RSVP feature.