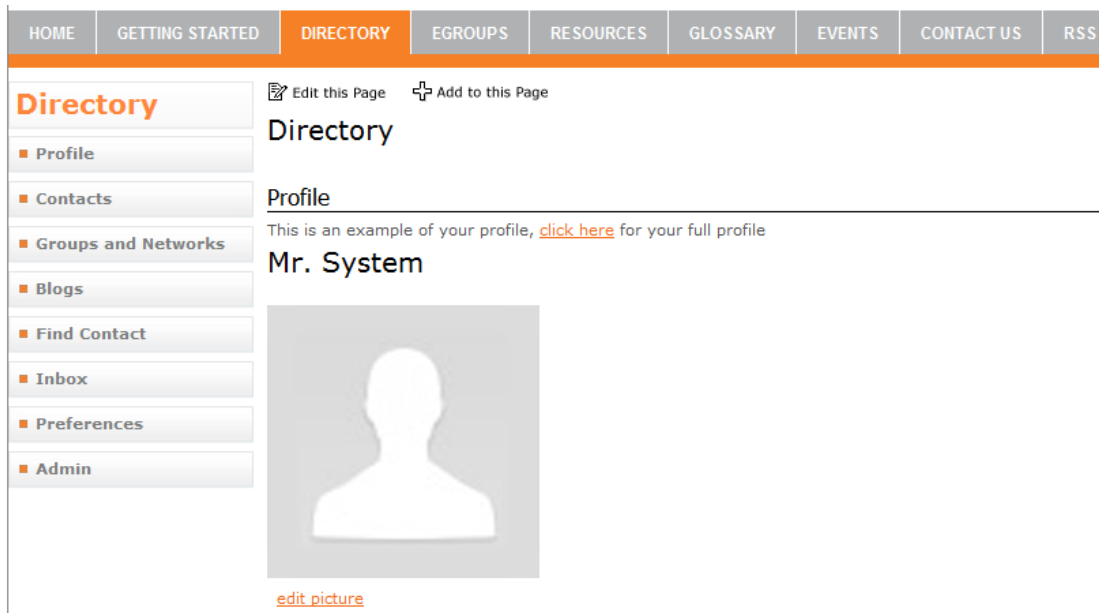


Welcome to the demographic control user guide! Our demographic tools allows you to collect and categorize tons of information about your member base. When we refer to demographics, we mean any kind of traits or unique information that are relevant to your industry that you would like to capture. Creating, customizing and recording your member demographic choices is really as easy as 1,2,3.

How Do I Set-Up My Demographics?

Your members have the option to input all demographic information when they set-up or build their profile. The demographics control allows you to pre-define a list of demographic characteristics as well as allow for free form input for member defined ad-hoc information. Once you have created your characteristics, the Directory screen will be updated to show all the options available to your members.

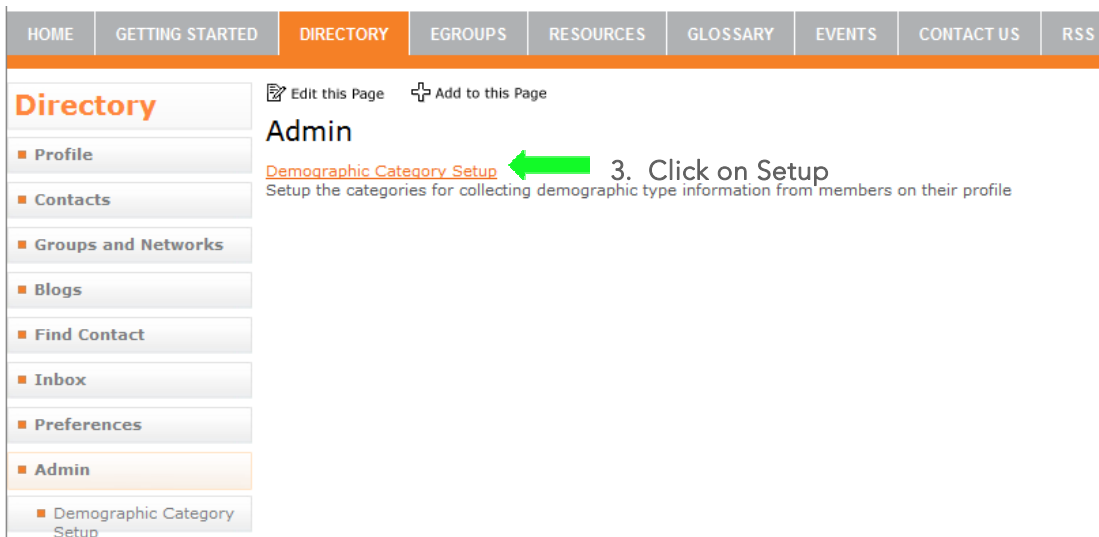
1. Click Directory



2. Click Admin

You will now see the admin screen containing the Demographic Control Set-up prompt.

Click on **Demographic Category Set-Up** prompt.



3. Click on Setup

And voila– You are ready to add or edit your demographic categories. If this is your first time to use the demographic set-up, you may notice that there may be some default values. These values are not required and you may edit the category information.

Let's first take a look at the information required to build your categories.

1. Demographic Type Name (Category Name)

The first text box is the title of your category. The second, longer text box is the description of your category.

2. Multiple Choices

This selection is used if you have a list or multiple selections/choices for the category. By selecting multiple choice, you will be creating a list of choices in which members can select more than one option to apply to themselves. If you have a list of choices, but the member can only choose one and only one option, do not select multiple choice.

3. Include in Networks

This option allows you to use the category choices to create your networks. Networks are groups that are automatically built based on mutual information regarding interests, job history, certifications or education, i.e. any similar information.

4. Applies to People

Option to apply the category choices to only to people.

5. Applies to Companies

This option allows you to apply the category choices to only companies. If your category is applicable to both people and companies, then both check boxes must be checked.

Question: How does Directory differentiate between a person and a company? Do I need to set these options?

Your AMS (if applicable) sets the company/person indicator when member information is received by Higher Logic.

In a few instances however, you may need to set the company indicator located on the profile screen.

6. Freeform Allowed

This option allows your members to enter in ad-hoc information. An open text field is created where members can input additional information.

7. Add Demographic Type

Allows you to add a new category of demographics.

8. Actions

Lists the options you have with each category, choices or delete.

9. Choices

Allows you to input the selections or options of your category

10. Delete

Removes the category permanently. All instances of the category will be removed including any database records.

11. Add to Profile

Adds the category and the choices to the profile page of the directory screen

12. Add to Search

Adds the category and the choices to the search engine.

13. Remove from Profile

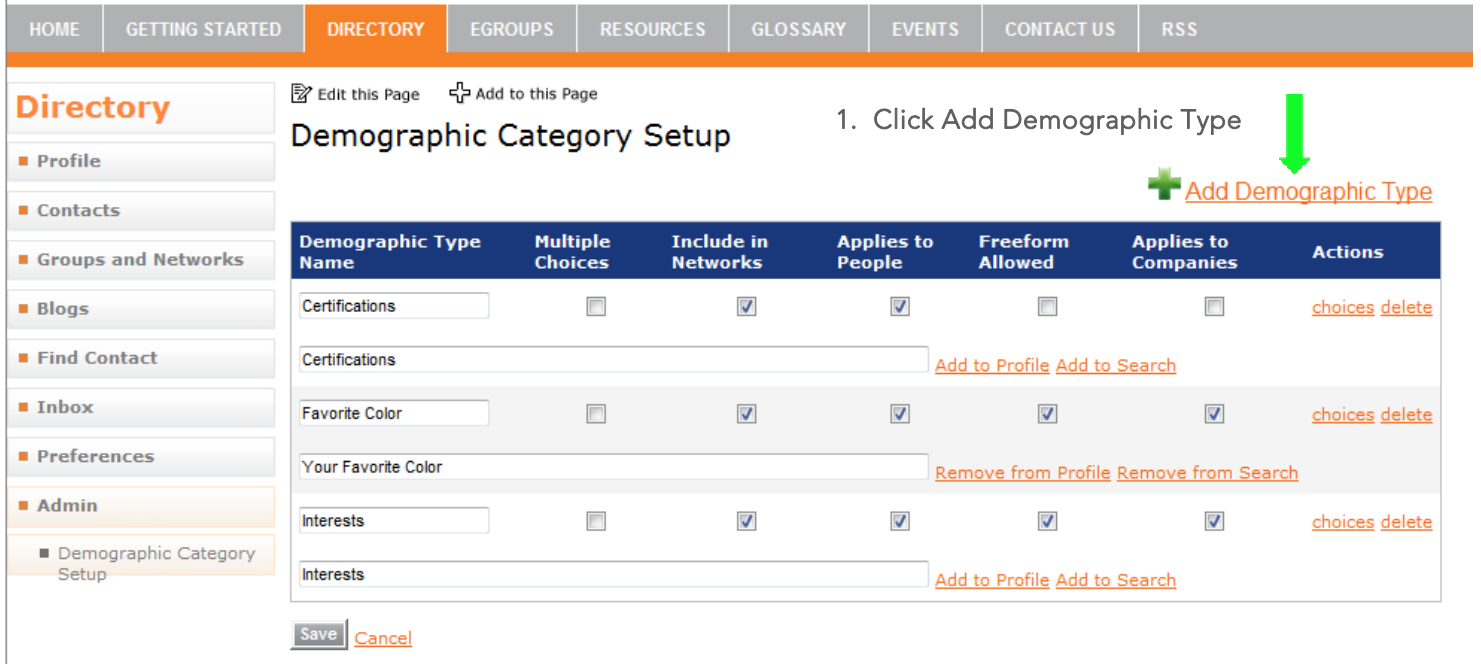
Removes category and the choices from the directory screen.

14. Remove Search

Removes category and the choices from the search engine.

Step 1: Add a New Category

We will begin by adding a new category. We will add a category called Awards and the choices will be: Emmy , Tony and Oscar. You will need to click on **Add a Category Type**.



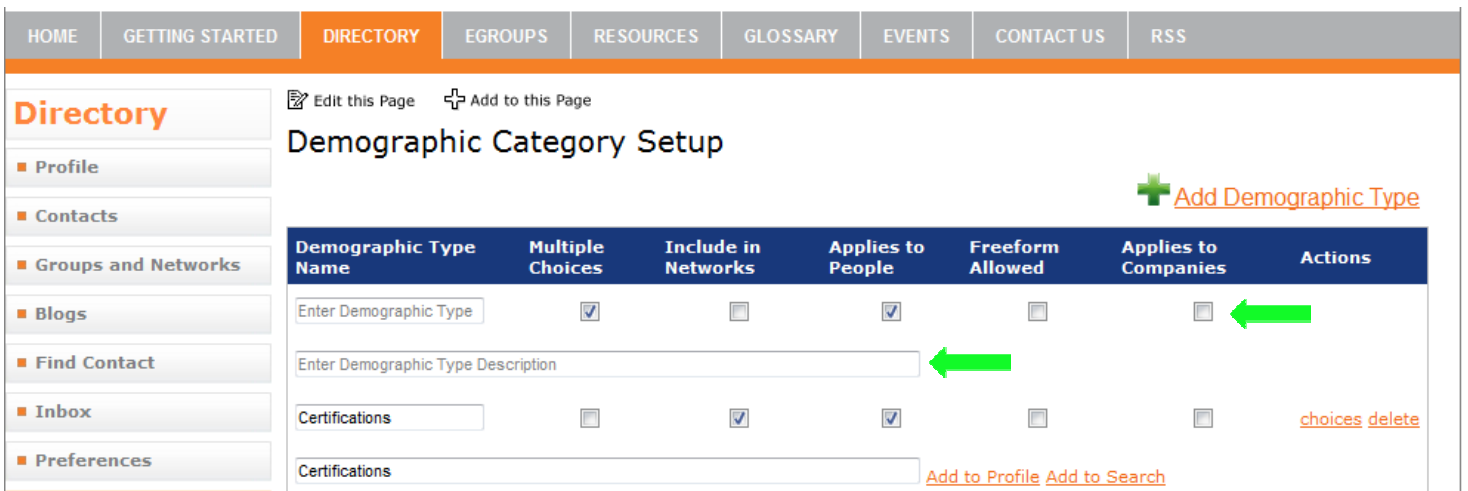
1. Click Add Demographic Type

[+ Add Demographic Type](#)

Demographic Type Name	Multiple Choices	Include in Networks	Applies to People	Freeform Allowed	Applies to Companies	Actions
Certifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	choices delete
Certifications				Add to Profile	Add to Search	
Favorite Color	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	choices delete
Your Favorite Color				Remove from Profile	Remove from Search	
Interests	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	choices delete
Interests				Add to Profile	Add to Search	

[Cancel](#)

A new entry field will appear for you to enter in the category information.



[+ Add Demographic Type](#)

Demographic Type Name	Multiple Choices	Include in Networks	Applies to People	Freeform Allowed	Applies to Companies	Actions
<input type="text" value="Enter Demographic Type"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="Enter Demographic Type Description"/>				Add to Profile	Add to Search	
Certifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	choices delete
Certifications				Add to Profile	Add to Search	

HOME GETTING STARTED **DIRECTORY** EGROUPS RESOURCES GLOSSARY EVENTS CONTACT US RSS

Directory Edit this Page Add to this Page

Demographic Category Setup

[+ Add Demographic Type](#)

Demographic Type Name	Multiple Choices	Include in Networks	Applies to People	Freeform Allowed	Applies to Companies	Actions
Awards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	choices delete
Professional Awards Earned				Add to Profile Add to Search		
Certifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	choices delete
Certifications				Add to Profile Add to Search		

[Cancel](#)

1. Click Save

2. After SAVE, Click On "Choices"

We will add a category "Awards" and a description of "Professional Awards Earned".

We will check all of the checkboxes to explore all available options.

Once the category name and description are completed, click the **SAVE** button.

Note: The Actions for your category (choices/delete) will not be available until you **SAVE** your category. Once you **SAVE** your category, the categories are arranged alphabetically, so be sure to look for yours in the right place!

Now you are ready to input your category choices—Click on '[choices](#)' and the Choices Set-up Screen will be displayed.

HOME GETTING STARTED **DIRECTORY** EGROUPS RESOURCES GLOSSARY EVENTS CONTACT US RSS

Directory Edit this Page Add to this Page

Demographic List Setup

1. Click Add Demographic

Awards [+ Add Demographic](#)

Demographic Name	Demographic Type	Actions
(Empty list)		

As you can see, the list is empty, but if you had previously created choices for a this category, the options would be displayed here.

To add choices to your category, click on "Add Demographic".

Once you click on "Add Demographic"(Need better name), you will see a demographic name and a description appear. Enter in the name of your category choice and a description.

Here you can see, we have entered in our list of Awards. The description will show in "*****".

Once you have added your choice name and description hit **SAVE**.

If you have more than one choice for your category, continue to click "Add Demographic" for each entry. More demographic lines will appear and allow you to input as many choices as necessary. Click on **SAVE** after each addition.

Click on **FINISHED** when you have completed your list.

Step 3: View Your Choices

Once you click on "FINISHED", you will be redirected back to the Demographic Set-Up Screen.

The final step is to add your category choices to the Directory profile pages..

Click on "Add to Profile". This will add your category choices to all related websites/microsites if you have multiple component or chapter sites. All members will now have access to this new feature.

You will note that once you click on "Add to Profile", the option will update on the screen to read "Remove from Profile". If you click on "Remove from Profile", the category will be removed from all your directory pages.

If you would like to include these demographics in the search function, click on "Add to Search".

Again, note that once you click on "Add to Search", the option will update on the screen to read "Remove from Search". If you click on "Remove from Search", the category will be removed from all your Search queries..

Now you are ready to view the new demographics on the Profile Screen.

Click on **Profile**

You will now see a header containing your category, in our example you will see "Awards"

Click on **Edit** and you will see all of your category choices. You will also note the open form for members to include their ad-hoc information.

The screenshot shows a user profile for 'Mr. System' on a 'Directory' website. The page has a left sidebar with navigation options: Profile, Contacts, Groups and Networks, Blogs, Find Contact, Inbox, Preferences, and Admin. The main content area has a top navigation bar with 'Home', 'Profile', 'My Contacts', 'Inbox', 'Blogs', and 'Communities'. The profile information includes a placeholder for a profile picture, the name 'Mr. System', and contact details for 'Higher Logic' (CEO, Executive, 1629 K Street, NW, Suite 300, Washington Montgomery, Denmark). It also lists 'Current BETA Activities' as 'Higher Logic Users Group, Social Networking for Associations'. Below this are sections for 'Bio', 'Interests', 'Certifications', 'Education', and 'Job History', each with an 'Add' link. The 'Awards' section is circled in green and contains checkboxes for 'Emmy', 'Oscar', and 'Tony', followed by a text input field labeled 'Enter your own values'. A green arrow points to this section from the left.

Congratulations! You have now added a new way to connect and categorize your members.

Frequently Asked Questions

1. What if I need to change or add new choices to my categories?

That is very easy. Simply go to the Demographic Category Set-Up Screen.

Click on **Choices**

Demographic Type Name	Multiple Choices	Include in Networks	Applies to People	Freeform Allowed	Applies to Companies	Actions
Awards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	choices delete
Professional Awards Earned						Remove from Profile Remove from Search

If you would like to add more selections, simply click on **“Add Demographic”** and a new entry will be created for you. Don’t forget to **SAVE** after each entry.

If you would like to edit and option, you may simply type over the existing information and hit **SAVE**.

If you would like to remove a selection, click on the **“delete”** action and the option will be permanently removed.

Awards [+ Add Demographic](#)

Demographic Name	Demographic Type	Actions
Emmy	Awards	delete
TV and Film Award		
Oscar	Awards	delete
Movie		

2. I have added new sites and do not see the categories on the Profile screen—Why?

Each time you add a new site, you must go back and click **“Add to Profile”**. Even if you have previously added the category, once a new site is added the profile gets reset and you must re-add the category.

It is the same scenario for Add to Search—with any new sites added, the search gets reset and you must update the prompt again on the Category Set-up screen.

HOME GETTING STARTED **DIRECTORY** EGROUPS RESOURCES GLOSSARY EVENTS CONTACT US RSS

Directory Edit this Page Add to this Page

Demographic Category Setup

[+ Add Demographic Type](#)

Demographic Type Name	Multiple Choices	Include in Networks	Applies to People	Freeform Allowed	Applies to Companies	Actions
Awards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	choices delete
Professional Awards Earned						Add to Profile Add to Search
Certifications	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	choices delete
Certifications						Add to Profile Add to Search

3. Are there any limits to how many categories I can add?

No, there are no limits on categories or on the choices within the categories.

4. I have added a new category, but I do not see it.

Once you save a category, the category list is alphabetized. Verify that your choice is in the list.

5. I want to change my some or all of my choices and apply them to another category, can I do that?

The screenshot shows the 'Demographic List Setup' page. At the top, there is a navigation menu with links: HOME, GETTING STARTED, DIRECTORY (highlighted), EGROUPS, RESOURCES, GLOSSARY, EVENTS, CONTACT US, and RSS. Below the navigation, there is a sidebar on the left with a 'Directory' header and several menu items: Profile, Contacts, Groups and Networks, Blogs, Find Contact, Inbox, Preferences, and Admin. The main content area has a title 'Demographic List Setup' and a sub-header 'Awards'. There are two 'Edit this Page' and 'Add to this Page' icons. A green plus icon and a link 'Add Demographic' are visible. The table below has three columns: 'Demographic Name', 'Demographic Type', and 'Actions'. The first row has 'Emmy' in the name column, 'Awards' in the type column, and a 'delete' link in the actions column. The second row has 'TV and Film Award' in the name column, an empty type column, and an empty actions column. The third row has 'Oscar' in the name column, a dropdown menu in the type column, and a 'delete' link in the actions column. The dropdown menu is open, showing a list of categories: Awards, Hidden, Animals, Awards (highlighted), Certifications, even numbers, Favorite Color, Interests, and Sessions Attended. At the bottom of the table, there are 'Save', 'Finished', and 'Cancel' buttons.

Yes, on the Choices Set-up screen, once you have created and saved your choices, each choice can be reassigned to another category. Click on the Category Type arrow and change any choices to new category.