Chapter Website

Site Admin User Guide

December 14, 2018

*Revised 3/27/19

Subject to Change
Chapter Website Site Admin Guide

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OVERVIEW

To assist the chapters with managing their web presence and provide access greater chapter management tools, NABA has invested in a digital networking platform (hosted by Higher Logic) that will support centralized website hosting for all of NABA’s professional chapters (“chapter websites”). This will allow NABA to create standardized websites for all the NABA professional chapters. NABA staff can make global updates to the content that is common across all the chapter sites while granting administrative privileges to each chapter’s leadership to customize areas that are specific to their chapter’s activities and members.

IMPLEMENTATION PHASES

The implementation for the chapter websites began August 2018 with the release of the Chapter Content Upload link in the August 2018 Chapter Leaders Newsletter.

Implementation Phases

The implementation will be conducted in three phases: Content Collection, Website Build, Site Launch.

Content Collection - For the initial site build, chapter leaders or their webmaster will provide NABA with content through a survey link to populate their respective websites.

Website Build - NABA will build the chapter’s website on master template built by our implementation partner Higher Logic using the content received from the chapter in their Survey response. Internal testing of the website will be conducted by the NABA team, followed by external testing by the chapter before the site is made live.

Site Launch - Following final approval, the website will go live and be communicated via social media, NABA website updates, membership email (once all chapter sites are live), and chapter leader newsletter. Once a specific chapter’s implementation has begun, estimated implementation time is approximately 20 - 25 business days.
# TIMELINE

## Content Collection Phase: Website content collection is per chapter

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Estimated in Business Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 31, 2018</td>
<td>Chapter Content Upload link (via SurveyGizmo) included in August 2018 Chapter Leaders Newsletter</td>
<td>1</td>
</tr>
<tr>
<td>Aug 31, 2018</td>
<td>Content collection and input from chapter leaders or web content manager begins</td>
<td>4</td>
</tr>
</tbody>
</table>

## Website Build Phase: Website build time is determined once content is received from the chapter contact. Website build is per chapter

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Est. Bus. Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>Content Upload by NABA implementation team</td>
<td>3 - 5</td>
</tr>
<tr>
<td>TBD</td>
<td>Internal testing of Chapter site by NABA implementation team</td>
<td>2</td>
</tr>
</tbody>
</table>

## Chapter Leaders Review Phase: Chapter leaders review is per chapter

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Est. Bus. Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>Chapter leader testing of their respective websites</td>
<td>3 - 4</td>
</tr>
<tr>
<td>TBD</td>
<td>Additional website updates (if needed)</td>
<td>2 - 3</td>
</tr>
<tr>
<td>TBD</td>
<td>Final approval</td>
<td>2 - 3</td>
</tr>
</tbody>
</table>

## Website Launch Phase

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Est. Bus. Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>Once final approval is received from chapter leadership, the chapter website will be made “live”.</td>
<td>2</td>
</tr>
</tbody>
</table>

## Communications

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Est. Bus. Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>Website rollout will be announced via NABA social media channels.</td>
<td>1</td>
</tr>
<tr>
<td>TBD</td>
<td>Announcement will be made in chapter leadership newsletter.</td>
<td>TBD</td>
</tr>
<tr>
<td>TBD</td>
<td>Once all chapter websites are live, an announcement will be made via membership email.</td>
<td>TBD</td>
</tr>
<tr>
<td>TBD</td>
<td>Once all chapter websites are live, a press release will be created and released.</td>
<td>TBD</td>
</tr>
</tbody>
</table>
NABA HOSTED WEBSITE PLATFORM AND TECHNCAL SUPPORT AGREEMENT

To confirm your chapter’s agreement to transition your website to the HQ-hosted platform, please read the Affiliate’s Access and Management of the NABA-Hosted Website Platform and Technical Support Agreement in the Confirm and Agree section at the end of the content upload form and check the box “I ACCEPT”. The Web Hosting Agreement is also located at https://www.nabainc.org/webhostingagreement.

SITE ADMINISTRATION – COMMUNITY ADMIN RIGHTS

As a security measure, we have created a unique profile for your chapter so that you (and those designated from your chapter) can have access as a Community Admin. Previously, your designated chapter leaders were giving permissions to be Site Admins but the Community Admins level have control of many more features on your chapter’s website. This profile was created to provide your chapter leaders with an extra level of security on who has access to the "controls" of your chapter’s website. A good example is that you will have transitions in leadership and you do not want a variety of people - especially those that are no longer chapter leaders having access to your chapter's website controls. One unique user profile can help prevent this from happening.

Community Admin Controls

Community Admins can update their community's join and view permissions, add and remove Community Admin access, add new members, restrict and remove current members, run reports, email members, moderate Discussion and Library items, manage community events, manage any community Volunteer Opportunities, and more.

Please only share the password with chapter leaders that have been granted rights to make updates to your chapter website.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Chapter</th>
<th>Naylor User Name</th>
<th>Password</th>
<th>Unique email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta Chapter</td>
<td>Web Administrator</td>
<td>Atlanta</td>
<td>Atlanta Web Admin</td>
<td>XXXXXXXX</td>
<td><a href="mailto:AtlantaWebAdmin@nabachapters.org">AtlantaWebAdmin@nabachapters.org</a></td>
</tr>
</tbody>
</table>

Full Chapter Website User Admin Profile names can be found in Appendix E.
MANAGING YOUR CHAPTER WEBSITE – ADDING CONTENT TO YOUR WEBSITE

A. How Can Content Be Updated?

Webinar

The Managing Your New NABA Chapter Website - Adding Content to Your Chapter Website Webinar (December 11, 2018) covered how to add content to your chapter website. To view webinar, click here.

Step-by-Step

Once the initial site build is complete, the chapter designated webmaster (Admins) will be given rights to access the administrator portal of their chapter’s website.

1. Sign in to the chapter page (upper right corner of top navigation) using your chapter’s profile login.
2. Proceed to the page that you would like to make content updates (for this example, the Baton Rouge Chapter News page will be used). Once on the page, click on the folder icon on the right of the page.
3. Once on the Site Admin page, go to the Content section and double click on the section you want to add new content.

4. Please don’t change Name, CSS Wrapper Class Name, View Permissions, nor Type of Content. Make your content updates as needed in the page box. Please follow these guidelines for the text:
   Header font – Helvetica, Size – 12, Bold; Content – Helvetica, Size – 12.
5. Save and Return to Site to track your changes. Please note that any updates saved are immediately LIVE on the page.

B. Adding Events

The complexity of the event-creation process is highly dependent on the type of event being created. For example, creating a monthly webinar that only requires attendees to RSVP requires less configuration than a multi-day event with a full agenda (e.g., sessions, registration add-ons, etc.).

Much of the complexity is determined by the Event Type, which you'll need to select during event creation. Event Types largely control the features and settings that can be configured; you can think of them as templates that dictate which building blocks are available, with the most important being the registration process.

Additional information on adding events is located at https://support.higherlogic.com/Content/IWantTo/Products/Optional/EventManager/Overview.htm
C. Emailing Chapter Members

Reaching out to a community's members is an important community-management task!

CREATION OF SITE EMAIL, NEWSLETTER OR FLYER TEMPLATES FOR COMMUNICATION TO MEMBER LIST – Community Admins have the ability to create messages within their respective communities on the microsite and send email blasts to their users. Please note that this functionality is limited and you can only use one standard template for the email sends.

CONFIGURATION CAPABILITIES FOR SCHEDULING SITE COMMUNICATIONS TO BE SENT TO MEMBERLIST AT A PRE-ESTABLISHED DATE, TIME - We do not support automated messaging. You will need to use an external marketing platform if you want automated messaging. You can add content items to the site regarding maintenance or create them ad hoc.

EMAIL A COMMUNITY'S MEMBERS

Reaching out to your chapter’s members is an important chapter-management task. While the platform offers a variety of ways to contact these members (e.g., Discussion posts, Automation Rule emails, Announcements, etc.), you can also directly email the members of you chapter.

https://support.higherlogic.com/Content/IWantTo/ConfigAComm/EmailingMembers.htm?Highlight=emailing

D. Job Postings

DOES HIGHER LOGIC HAVE BUILT-IN FUNCTIONALITY TO ALLOW FOR JOB POSTING FEATURES?

Chapter leaders can manually input job postings on your chapter’s Job Board page. You have a section that you control the content and can manually put in job posts from your chapter’s partners. Also included on your Job Board page is the RSS feed from the NABA Career Center, specific to your chapter.
SITE ADMINISTRATOR RESOURCE LINKS

A website page has been set up, specifically dedicated to the Chapter Websites. This page is located in the Volunteer Leaders Resource Center (VLR) on the nabainc.org website (the icon to the page is in the top navigation bar, at the top, right corner). Simply click on the symbol and open the toolkit for the Chapter Website Resource Center. The direct link is - https://www.nabainc.org/chapterwebsitesresources.

Additional Resources

The resources below provide additional information through Higher Logic.

- How to Create Pages
- How to Organize Pages and Content
- How to hide and Delete Pages and Content
- Event Manager
  - Demo
- Volunteer Manager Overview
  Volunteer Manager allows your chapter to build, manage, and provide a complete volunteer program for your members to not only increase engagement in your online community but also in the real world. Volunteer Manager makes it easy to create opportunities, match volunteers to them, and track resulting data about those who participate in a single place, providing exponentially greater value to your organization and shining a light on your unsung heroes.
    - Video Walkthrough
    - Webinar
- Discussion Groups
  Discussion Groups empowers your chapter members to collaborate anytime, anywhere.
  Users have a centralized place that integrates seamlessly with your existing website where they can collaborate, ask questions and offer answers -- all in a private, secure forum.
- Member Directory
SYNDICATED CONTENT VS. CHAPTER CONTROLLED CONTENT

Syndication is the process of creating content on the main website which is then reflected across all the chapter websites. The syndicated content is controlled on the main website by NABA, Inc. and subsequent syndicated areas on subpages.

NABA, Inc. will create standardized websites for all the professional chapters. NABA staff will be able to make global updates (syndication) to the content that is common to all the websites while granting administrative privileges (chapter control) to each chapter to customize areas that are specific to their chapter (chapter leadership, programs, local events, sponsorship info, etc.).

CHAPTER URLS

The new default chapter URL (nomenclature) is {CHAPTER}.nabachapters.org

Example - Atlanta.nabachapters.org. Full list provided in Appendix A.

URL REDIRECTS

Domain Name System (DNS) Instructions

Existing domain that you want to leverage

If a chapter has a domain already purchased for their current chapter website all traffic to that domain can be redirected to the new website, which has the default nomenclature of {CHAPTER}.nabachapters.org. The chapter’s domain name system (DNS) – such as GoDaddy - will need to be contacted and create a permanent 301 redirect to take all traffic going to the chapter’s current domain to the new chapter website.

Chapter doesn’t currently have an URL

If the chapter does not have an existing domain name, the CNAME to use for marketing and communication initiatives is provided in Appendix A.

CHAPTER BANNERS

Banners will be created by NABA Inc. Sample banner is as follows:

The original banner is white lettering with a transparent background. The image above is how the banner will appear on the website.
DONATION PLATFORM

There are a variety of platforms available for chapters to receive donations. If you have a platform already set up, please include the link to the chapter’s donation page in the content upload survey. For those chapters that don’t currently use a donation platform, included are directions for a common platform option – PayPal.

PayPal

Most nonprofits choose PayPal Payments Standard or PayPal Checkout (formerly known as Express Checkout) as their payment solution. These options let donors complete their transactions on the PayPal website. Note that you must have a PayPal Business account – not a Personal account – to accept donations for your organization. You’ll need to confirm your nonprofit status to be eligible for the nonprofit transaction rate.

Be prepared to provide the following information:

- Evidence of nonprofit registration with any applicable regulatory body, such as Articles of Incorporation, IRS 501(c)(3) determination letter or documentation of candidacy.
- A pre-printed bank statement or voided check from your account. Starter checks are not acceptable. The organization needs to own each bank account linked to this PayPal account. You can’t use a personal bank account.
- Information about how you intend to use the money (such as donations or membership fees).
- Your mission statement (if applicable).
- A subordination or fundraising letter (if applicable).

The PayPal Business account page is located at https://www.paypal.com/webapps/mpp/merchant

A YouTube link is also available using the search “How to Setup PayPal for Non-Profit”.

If you need further assistance, contact the NABA support team via email or phone, listed in the Help Desk and Support section of this document.

HELP DESK AND SUPPORT

Chapter leaders and those designated as the webmaster for the chapter will be provided with training and resources to assist with continued chapter website management.

Email Help Desk
NABA - chapterwebsitesupport@nabainc.org

Phone
NABA - (240) 630-3563

Higher Logic Support Center
This site offers users the opportunity to type in questions in the Higher Logic community. This site is located at https://support.higherlogic.com/Content/Home.htm.
## Appendix A: Chapter URL List

**NABA Professional Chapter Website URLs / Vanity URLs**

*The Vanity URLs can be used for marketing and communication purposes. The Vanity URLs directs people to the longer website URL. Revised 3/26/19*

<table>
<thead>
<tr>
<th>Region</th>
<th>Chapter</th>
<th>Vanity URLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern</td>
<td>Baton Rouge Chapter</td>
<td><a href="http://www.nabachapters.org/BatonRouge">www.nabachapters.org/BatonRouge</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Charlotte Chapter</td>
<td><a href="http://www.nabachapters.org/Charlotte">www.nabachapters.org/Charlotte</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Columbia Chapter</td>
<td><a href="http://www.nabachapters.org/Columbia">www.nabachapters.org/Columbia</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Greater Jackson Chapter</td>
<td><a href="http://www.nabachapters.org/Jackson">www.nabachapters.org/Jackson</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Greensboro Chapter</td>
<td><a href="http://www.nabachapters.org/Greensboro">www.nabachapters.org/Greensboro</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Memphis Chapter</td>
<td><a href="http://www.nabachapters.org/Memphis">www.nabachapters.org/Memphis</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Middle Georgia Chapter</td>
<td><a href="http://www.nabachapters.org/MiddleGeorgia">www.nabachapters.org/MiddleGeorgia</a></td>
</tr>
<tr>
<td>Southern</td>
<td>Nashville Chapter</td>
<td><a href="http://www.nabachapters.org/Nashville">www.nabachapters.org/Nashville</a></td>
</tr>
<tr>
<td>Southern</td>
<td>New Orleans Chapter</td>
<td><a href="http://www.nabachapters.org/NewOrleans">www.nabachapters.org/NewOrleans</a></td>
</tr>
<tr>
<td>Eastern</td>
<td>Baltimore Metropolitan Chapter</td>
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</tr>
<tr>
<td>Eastern</td>
<td>Greater Hartford Chapter</td>
<td><a href="http://www.nabachapters.org/Hartford">www.nabachapters.org/Hartford</a></td>
</tr>
<tr>
<td>Eastern</td>
<td>Metro DC Chapter</td>
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<tr>
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<td>Northern New Jersey Chapter</td>
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<td>Eastern</td>
<td>Philadelphia Chapter</td>
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<td>Eastern</td>
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<tr>
<td>Western</td>
<td>Austin Cen-Tex Chapter</td>
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<td>Dallas Fort Worth Chapter</td>
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<td>Houston Chapter</td>
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<td>Western</td>
<td>San Francisco Chapter</td>
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<tr>
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<td>Chicago Chapter</td>
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<tr>
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<td>Cleveland Chapter</td>
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<tr>
<td>Central</td>
<td>Columbus Chapter</td>
<td><a href="http://www.nabachapters.org/Columbus">www.nabachapters.org/Columbus</a></td>
</tr>
<tr>
<td>Central</td>
<td>Detroit Chapter</td>
<td><a href="http://www.nabachapters.org/Detroit">www.nabachapters.org/Detroit</a></td>
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<td>Central</td>
<td>Greater Louisville Chapter</td>
<td><a href="http://www.nabachapters.org/Louisville">www.nabachapters.org/Louisville</a></td>
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<td>Central</td>
<td>Greater Indianapolis Chapter</td>
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<tr>
<td>Central</td>
<td>Milwaukee Chapter</td>
<td><a href="http://www.nabachapters.org/Milwaukee">www.nabachapters.org/Milwaukee</a></td>
</tr>
<tr>
<td>Central</td>
<td>Northwest Arkansas Chapter</td>
<td><a href="http://www.nabachapters.org/NWArkansas">www.nabachapters.org/NWArkansas</a></td>
</tr>
<tr>
<td>Central</td>
<td>Omaha Chapter</td>
<td><a href="http://www.nabachapters.org/Omaha">www.nabachapters.org/Omaha</a></td>
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<tr>
<td>Central</td>
<td>St. Louis Chapter</td>
<td><a href="http://www.nabachapters.org/StLouis">www.nabachapters.org/StLouis</a></td>
</tr>
<tr>
<td>Central</td>
<td>Twin Cities Chapter</td>
<td><a href="http://www.nabachapters.org/TwinCities">www.nabachapters.org/TwinCities</a></td>
</tr>
</tbody>
</table>
Appendix B: Sample Chapter Website Homepage

National News

About NABA

The National Association of Black Accountants (NABA, Inc.) is a nonprofit membership association dedicated to bridging the opportunity gap for black professionals in the accounting, finance, and related business professions. Representing more than 50,000 black professionals in these fields, NABA advances people, careers, and the mission by providing education, resources, and meaningful career connections to both professional and student members, fulfilling the principle of our motto: Lifting As We Climb.

About the NABA Baton Rouge Chapter

The mission of the NABA, Inc. Baton Rouge Chapter is to address the professional needs of its members and to build leaders that shape the future of the accounting and finance profession with an unfaltering commitment to inspire the same in their successors.

NABA Baton Rouge News and Highlights

NABA Baton Rouge - NABA Membership Recognition

The NABA Membership Recognition will take place on Thursday, September 8, 2016. Please come out and help us recognize our outstanding Baton Rouge Chapter members and partners. More Information

Night Out with NABA

The Night Out with NABA event was held at Donald C. Wads House, Southern University Campus, Baton Rouge, LA. View Images

Membership Drive Kickoff Meeting

The Membership Drive Kickoff Meeting was held at Lava Cantina, downtown Baton Rouge, LA. View Images
Appendix C: General Website Map

Top Navigation Bar
- Join
- Members Only
- eLearning
- NABA Now Community
- CPA Exam Review

Main Navigation Bar
- Home
- Job Board
  - Chapter Job Board
  - Job Seekers
- Membership
- Chapter Directory
- Community Features
  - Post A Message
  - Discussions
  - Libraries
  - Share A File
- Programs
  - Chapter Programs
  - eLearning
  - CPA Exam Review
- Events
  - Events
  - My Registrations
  - Manage Events

Home Page

Middle Navigation Bar
- Join NABA
- Programs & Events
  - Programs
    - (Chapter Specific)
  - Events
- Partnerships
- Donate to NABA
- Get Involved

Body

About NABA
- Our Mission

About NABA (Chapter)
- NABA (Chapter) Leadership
- NABA (Chapter) Student Chapters
- Contact Us

NABA (Chapter) News and Highlights
- NABA (Chapter) News
- NABA (Chapter) Events
- NABA (Chapter) Job Board

Social Media Links

(Chapter Specific)
Appendix D: Frequently Asked Questions

What would the cost be to manage this shared services framework?

There will be no cost to the chapter. This concept was first formulated when we migrated our membership system to Timberlake back in FY16. The "Community" platform we are also launching with the Chapter Website (both hosted by Higher Logic) was developed at the same time and is fully integrated with the membership system (Naylor, formerly Timberlake).

Will chapters have to pay for their new chapter website?

No! NABA is covering the costs for the website hosting services, vendor services to build and maintain the website platform, and the custom chapter-specific URLs. NABA has also included the Event Management, Volunteer Management, and Community modules in the total package for chapters, free of charge.

How can content be updated?

Once the initial site build is complete, the chapter designated webmaster (Admins) will be given rights to access the administrator portal of their website.

How will the chapters be supported?

Initially, site Admins can contact NABA for support (see contact info above under "Help Desk & Support"). There will also be a representative from Higher Logic assigned to our account to assist with technical support (contact info TBD).

How are these websites saving the chapters money?

Chapters will no longer need to pay for website hosting services, chapter specific URLs, or vendor services to build and maintain their website platform. Chapters that are currently using a fee-based event registration platform like Eventbrite or Regpack can save additional money by using the built-in Events module (which is already integrated without membership system for real-time automatic identification of members vs non-members).

How do my chapter members log into access chapter-member only content?

All chapter websites are integrated with NABA's national membership database for a "single sign-on" experience. If they are signed into their profile on NABA's website, they will be logged into their chapter's site automatically (and vice versa). The member’s regular NABA username and password is all they will need to gain access.
What is the difference between syndicated content vs chapter-controlled content?

NABA will create standardized websites for all the professional chapters. NABA staff will be able to make global updates (syndication) to the content that is common to all the websites while granting administrative privileges (chapter control) to each chapter to customize areas that are specific to their chapter (chapter leadership, programs, local events, sponsorship info, etc.). Syndication is the process of creating content on a primary website which is then reflected across all the chapter websites. The syndicated content is controlled by NABA as a part of the core framework.

Can you explain the new chapter URLs?

In addition to NABA's investment in the chapter website platform, we have also purchased a unique URL for the chapter websites to make it easier for partners, potential members, etc. to find NABA's chapters through a consistent naming convention or pattern. The name pattern for the chapter website URLs is as follows: community.nabainc.org/[chapter name].

We currently have a chapter URL. How will the process be handled to transition to the new chapter URL?

If a chapter has a domain already purchased for their current chapter website, all traffic to that domain can be redirected to the new website domain name: community.nabainc.org/[chapter name]. The chapter's webmaster can setup domain forwarding through their domain hosting site (i.e. GoDaddy, Domain.com, iPage, etc.) by changing the DNS (domain name system) settings to redirect the web traffic to the new URL. If chapters need assistance with this, NABA's support team can help - we will just need the login and password for your domain hosting service.

How soon will my chapter's website "go live"?

The implementation for the chapter websites began August 2018 with the release of the Chapter Content Upload link in the August 2018 Chapter Leaders Newsletter. The target date for early adopters to go “live” is October 2018. View the Chapter Website Implementation Timeline.