

This how-to document contains four sections, addressing the most common questions about Point K collaboration features:

- ▶ Do my colleagues have to be co-workers (employees of the same organization as me?)
- ▶ Please explain the four “roles” I see when I’m adding colleagues.
- ▶ I have added or invited colleagues, but haven’t received any confirmation emails. What should I do?
- ▶ Step-by-Step Instructions

If you have any questions, don’t hesitate to contact us: info@innonet.org.

I. Do my colleagues have to be co-workers (employees of the same organization as me?)

Certainly not! Point K is about collaboration and community. The more we can work together, the less we’ll all need to spend energy reinventing wheels – so collaborating with people outside your organization isn’t only possible in Point K, it’s encouraged.

II. Please explain the four “roles” I see when I’m adding colleagues.

There are four “roles” that a Point K user might have within an organization:

Administrator: If you created an organization, you are automatically its Administrator. You may designate other members to be co-administrators. An organization must have at least one Administrator – you can’t demote yourself or delete your own membership unless you have already designated another Administrator. Administrators are responsible for:

- Approving requests for membership in an organization,
- Managing the organization’s membership, and
- Keeping the organization’s basic information up to date in the system.

Member: An organization member is a “typical” user –s/he will be able to use the tools and collaborate on the work of the organization, and may add or invite other members, but will not have permissions for managing membership (an administrator must confirm all memberships).

Reviewer: Sometimes you want to have someone else review and comment on your work, but you don’t want them to be able to change anything. This is what the Reviewer role is for. A reviewer may not add or invite additional members into an organization.

Sponsor: Innovation Network often works with nonprofits through a funder. For example, Foundation A might ask its 20 grantees to use Innovation Network’s online tools for program planning and evaluation. Program officers at Foundation A might want to have some viewing and reporting capability—for example, they might want to be able to print aggregated data-based reports about the types of outcomes that their grantees are tracking. The Sponsor role allows for this type of relationship.

It’s possible for one person to wear multiple hats at different organizations. For example, a staff member at a foundation might be a Member of Point K, and at the same time be a board member for a nonprofit organization with Sponsor permissions for the nonprofit, while also being a Reviewer for several other organizations.

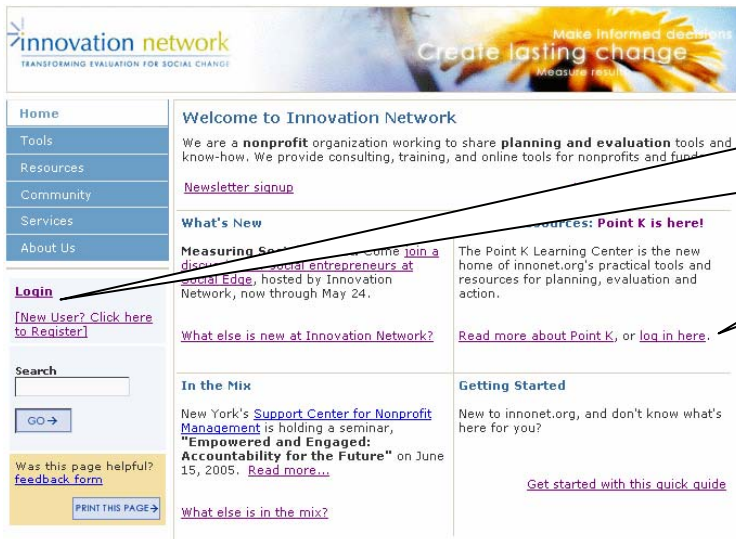
III. I have added or invited colleagues, but haven’t received any confirmation emails, and/or they say they haven’t received invitations. What should I do?

Sometimes, the system emails sent out by Point K are blocked by spam filters (either at your inbox, or by your internet service provider). We’re working to correct this.

You can always check the status of membership requests by visiting your organization’s home page in Point K (go to “My Organizations” and click on your organization’s name), and choose the “Manage Membership” tab.

If a person you invited doesn’t respond, please check with them directly to see if they received the invitation. If they didn’t, please let us know (info@innonet.org), and we will help determine the best solution (either adding them directly, or having them register at Point K and requesting membership in your organization.)

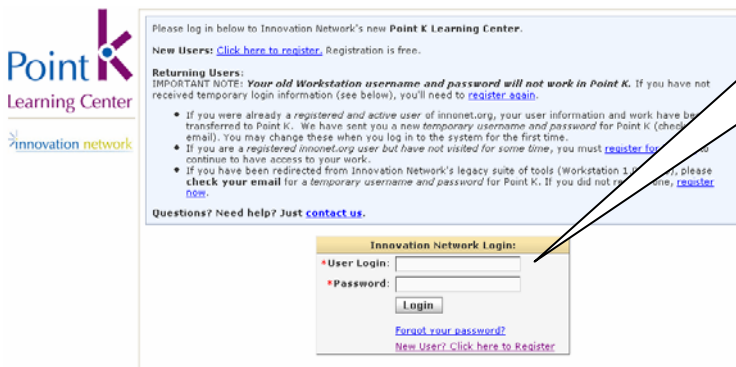
III. Step-by-Step Instructions to Add or Invite Colleagues



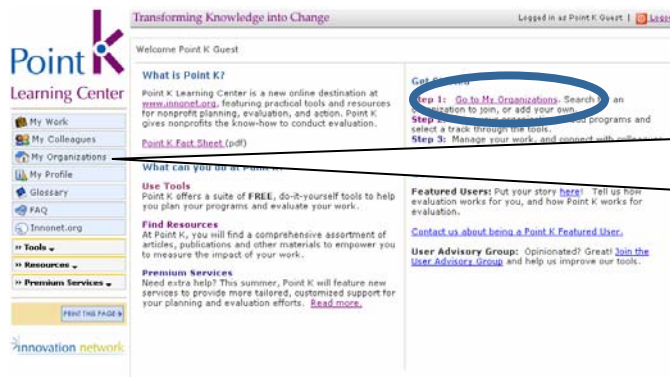
www.innonet.org

Log into Point K: use either of these links to reach the login page.

Enter your User Login and password, and click "Login".



For Workstation users: Remember, your old Workstation login won't work in Point K. Not sure of your new Point K login? Check your email, or ask us: info@innonet.org.



From the Point K portal page, click "My Organizations" in the left-hand navigation, or use the circled link.

Point K: How to Add/Invite Colleagues

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My Organizations

Start here to establish membership with an organization in Point K. You must belong to at least one organization in order to access the tools. If you already belong to an organization you will see it listed here.

Begin by clicking **Join an Organization** to perform a search and see whether the organization you are affiliated with is already in the system. If it is, you simply request to join.

If you cannot locate your organization in the system, go ahead and create a new one by clicking **Add New Organization**. You will become the organization administrator when you create a new organization.

Organizations - Add New Organization | Join an Organization

Legal Name	Short Name	Executive Director	City, State	Country	Role
Guest Test Organization	test	Kathryn Point	Washington DC	USA	Administrator

☐ - Approved Membership ☐ - Pending Membership ☐ - Invited for Membership ☐ - Rejected for Membership

Click the name of the organization you want to invite people into.

This is a legend: white background means you are an approved member of an organization. Other colors indicate other membership statuses.

My Organizations » Guest Test Organization

Organization Work Programs **Manage Membership** Organization Profile

Organization Work

Your organization work consists of all the work products—logic models, evaluation plans, surveys, etc.—created by members of this organization. You can filter work products in three ways:

1. Select
2. Select
3. Click on

Guided Track

The Guided Track planning and organization a Manual track worked on, wh

Select a Program

Program » G

Work Product

Program » S

Work Product

Logic Model

(# 341)

My Organizations » Guest Test Organization

Organization Work Programs **Manage Membership** Organization Profile

Point K is a **closed membership** system. This means that people cannot get access to your organization's information unless you explicitly grant them access. The role hierarchy in Point K works like this:

If you are a **reviewer** in this organization, you can:

- **View and communicate** with other members of the organization.
- **Comment and collaborate** on work products you have access to.

If you are a **member** in this organization, you can do everything that a reviewer can, plus:

- **Add/invite** people to join the organization.
- **Add** programs.
- **Grant/remove access** to programs if you are the program manager.

If you are a **program administrator** in this organization, you can do everything a member can, plus:

- **Approve/reject** membership requests.
- **Add/delete** programs.
- **Grant/remove access** to programs and individual work products.

Once a membership request is approved, that user is listed under **Current Members** and automatically has access to the organization. If someone enters Point K on their own and requests membership to your organization, then their membership must be approved by the organization's administrator before they gain access to your organization.

Membership Requests - Show Deleted/Blocked Members

Name	Email	Role	Status	Actions
Bagnell Stuart, Jennifer	jabstuart@innonet.org	Member	Pending	✓ ✗ ✖

If you are a **program administrator** in this organization, you can do everything a member can, plus:

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[✓](#) - Approve | [✗](#) - Decline | [✖](#) - Block | [➕](#) - Re-Invite

Current Members - Add/Invite Member

Member Name	Email	Role
Guest, Point K	pointkquest@innonet.org	Administrator

Choose the "Manage Membership" tab.

If there are any pending membership requests, they will show up here.

Scroll down to see the "Current Members" block, and click "Add/Invite Member".

Point K: How to Add/Invite Colleagues

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My Organizations » Guest Test Organization

Organization Work Programs **Manage Membership** Organization Profile

New Members

How many members would you like to add/invite? **GO** **CANCEL**

Fill in your colleague's information on this row.

Choose the role you want this person to have (see pages 1&2 for a description of the roles).

You may choose to "Add" or "Invite".

Click "SAVE" when you have entered all the information about your colleague(s), OR "CANCEL" to change your mind.

What's the difference?

- ▶ **Adding** a member means that the person you add will automatically see your organization in their list of "My Organizations" when they next log into Point K.
- ▶ **Inviting** a member means that the system will send this person an email informing them that you have invited them to join your organization, and leave the decision up to them.

That's it! People you added can work in Point K right away. People you invited will receive an email invitation to register with Point K if they aren't already registered.