

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

- ▶ Why do I need to add or join an organization?
- ▶ Does my organization have to be a nonprofit?
- ▶ What are the different roles for?
- ▶ Step-by-Step Instructions

If you have any questions, don't hesitate to contact us: [info@innonet.org](mailto:info@innonet.org).

### **I. Why do I need to add or join an organization?**

Point K is about collaboration and community. The more we can work together, the less we'll all need to spend energy reinventing wheels. The first way we encourage collaboration is through the Organizations structure. If you're a member of an organization in this system, then you can share your work with other members; invite people from outside your organization to review your work; or allow sponsors interested in your work to get a sense of how you're doing. You can, if you wish, have an "organization" in Point K that's just you, yourself – no other members.

So, in order to use the **tools** at Point K, you need to join an organization. (Note: If you're not interested in the tools and are only at Point K for the Resources section, then you don't have to join an organization.)

### **II. Does my organization have to be a nonprofit?**

No! It doesn't even have to be a legal corporate entity. It can be a 501(c)(3) service provider, an international NGO, a grantmaking foundation, a university class, or a group of colleagues from different organizations who share a common interest.

### III. What are the different “roles” for?

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.

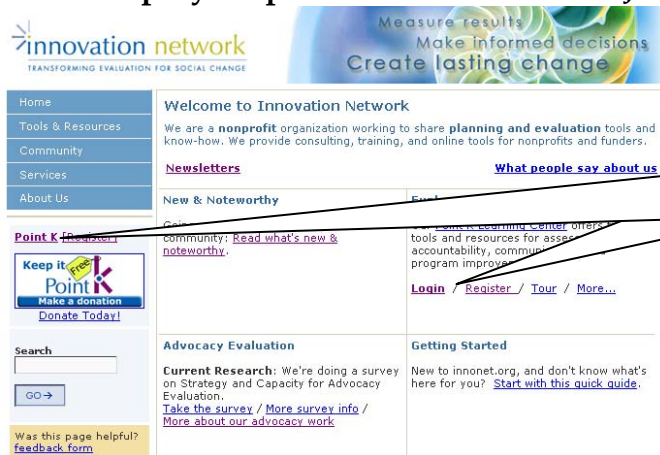
**Member:** An organization member is a “typical” user –s/he will be able to use the tools and collaborate on the work of the organization, but will not have permissions for managing membership.

**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.

**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.

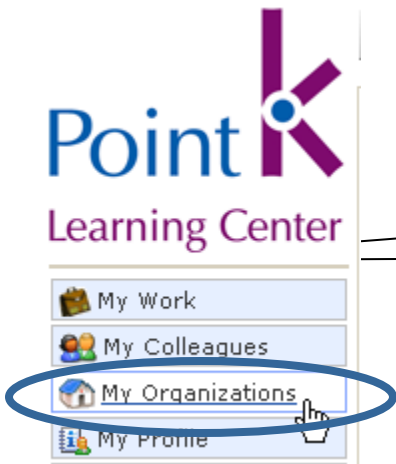
### III. Step-by-Step Instructions to Add or Join an Organization



[www.innonet.org](http://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".



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

## Point K: Add/Join an Organization

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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 an 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
<a href="#">Guest Test Organization</a>	test	Kathryn Point	Washington		

- Approved Membership    - Pending Membership    - Invited for Membership

If you think a colleague may have already set up your organization in Point K, use **Join an Organization**. (If not, skip down to "Add an Organization", next page.)

### Join an Organization

Check to see if your organization already exists in Point K. Enter the name of the organization in the box below and click the **Search** button.

The search results will display a list of organizations matching your search. Click **Join** in the right-most column to request membership in an organization. Until your membership request is approved by an organization administrator, your role in that organization will be **Pending**. If you already belong to an organization in the system, you can see your role in that organization.

**Search for Organization**   [« back to Organization List](#)

Guest  

**1 Organization(s) Found**

Legal Name	Short Name	Executive Director	City, State	Country	Role
Guest Test Organization	test	Kathryn Point	Washington DC	USA	<a href="#">[JOIN]</a>

Enter your organization name in the box and click "Search". If any organizations match your search, they will appear below the search field.

Review the search results. If one is a match with your organization, click JOIN.

The organization's Point K administrator(s) will receive an email prompting them to approve your membership request. Once they approve your request, the organization will appear under "My Organizations" the next time you log in, and you can start using the tools at Point K.

**Please Note:** Kindly refrain from requesting membership in an organization that you don't currently work with. If you find an organization on Point K that interests you, and you think you may be able to work together, please send them an email directly, rather than clicking "Join".

**My Organizations**

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

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

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


**Add an Organization:**  
If the search above didn't produce any matches, or you know for sure no-one else has set up your organization in Point K, go back to the "My Organizations" screen and click "Add 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		

- Approved Membership    - Pending Membership    - Invited for Members

Fill out the New Organization screen. Only the fields marked with a red asterisk are required, but the more information you complete, the better. Much of this information fills into other Point K tools later.



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**My Organizations**

Please take a moment to provide information about the organization you wish to create.

**New Organization**

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\* = Required Fields

\* Organization Legal Name:

Organization Short Name:  ⓘ

Address Line 1:

Address Line 2:

City:

State or Territory (U.S.): -- please select --

- OR -

State or Region (non-U.S.):

\* Country: United States

\* Zip or Postal Code:

Executive Director or CEO:  ⓘ

Phone & Ext:

\* Staff Size: -- please select --

Click the ⓘ icon click for more information about these fields.

Please enter your phone number with **no punctuation or spaces**—e.g., 2027280727, not (202) 728-0727

Religion

Buddhist

Christian

Hindu

Islamic

Jewish

Religious Media

Other

SAVE CANCEL

Click "Save" at the bottom of the form.

This newly-entered organization will now appear on your "My Organizations" tab. You will automatically be listed as an Administrator (since you created the organization); see the second page of this document for details.