



COLLEGE of AMERICAN
PATHOLOGISTS

Getting Started with CAP Community: **User Guide**

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TABLE OF CONTENTS

Background.....	3
First Time Login	3
Getting Started Page	4
Update Profile	4
Privacy Settings/Community Notifications.....	5
Join the Tips & Tricks Community.....	7
Workspace	7
Ballots	8
Library Tab.....	10
Discussions/Threads.....	11
Events.....	12

BACKGROUND

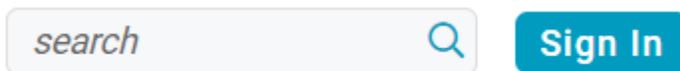
The CAP recognized that the current platform, Zopelone (Collaboration Space), was not meeting the needs of our work with councils and committees. Thus, the Information Technology Leadership Committee (ITLC) sought a solution to replace the current collaboration platform.

Due to Zopelone's limitations, many of our councils and committees began using alternative solutions (e.g., Amazon drive, Google Drive, Dropbox) to send large agenda books and collaborate. To better manage the needs of the organization and promote consistency, HigherLogic has been identified as the CAP Board of Governors-approved platform of choice which will allow us to provide all councils and committees with a dedicated space to work collaboratively, access resources, and share ideas.

This platform will provide CAP committee and council members a dedicated space to work collaboratively, access resources, and share ideas effectively. **HigherLogic from this point on will be called CAP Community.**

FIRST TIME LOGIN

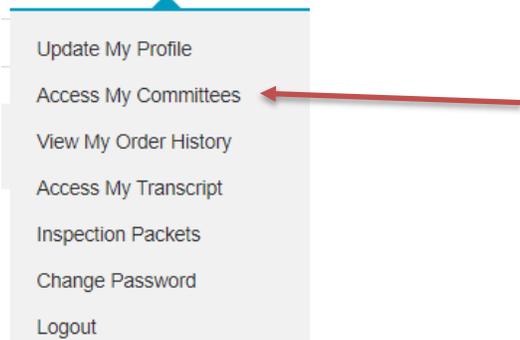
1. <https://community.cap.org/home>
 - a. Click on the blue Sign In button



- b. Login using your CAP login and password (Single Sign On)
 - c. Accept the Terms and Conditions – **Mandatory**
2. **Starting July 3rd** another way to find the new CAP Community is to go to <https://www.cap.org/> and log in.



- a. Using the Login dropdown; click on Access My Committees



GETTING STARTED (FOUND ON THE TOP LEFT OF THE PAGE)

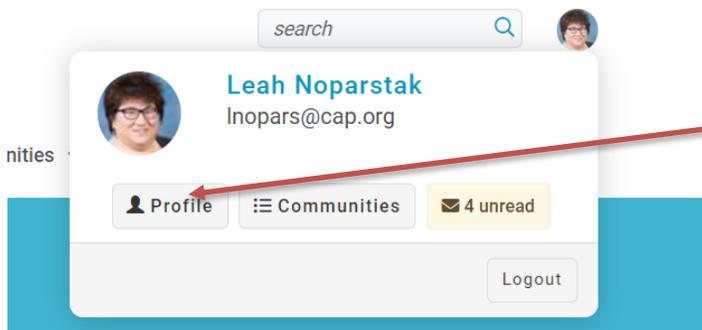
Getting started is a webpage that is an excellent resource for members regarding the first several items that all should complete once they've logged in (see below):

1. Update your profile – add photo and demographic information.
2. Update community notifications.
3. Ask or answer a question in their council or committee.

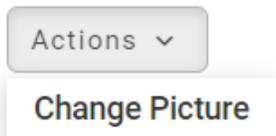
[Terms and Conditions](#) [Contact Us](#) [Getting Started](#)

UPDATE PROFILE

1. Log into CAP Community
2. Click on “Upload a Photo” and go to your profile.



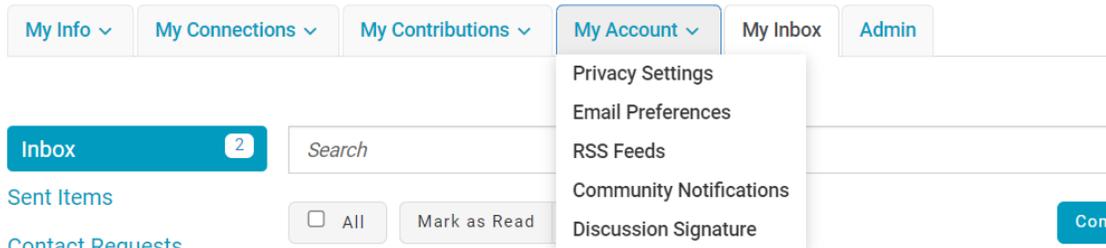
3. Under the Upload A Photo
 - a. Click on Actions
 - b. Click on Change Picture and follow the instructions.



4. Within your profile you'll update/complete (by clicking on the pencil icon):
 - a. Bio
 - b. Pronouns
 - c. Demographic information (optional)
 - d. Contact Details – pulls directly out of the CAP's single source of truth
 - e. Social Links (optional)

PRIVACY SETTINGS/COMMUNITY NOTIFICATIONS

1. Go to your Profile
2. Click on My Account



3. Privacy Settings
 - a. Please make sure you say “Yes” to being included in the member directory.
 - b. Leave all other settings “as is” as most of the information is being imported from our customer database.
4. Email Preferences
 - a. System Emails – leave alone (shouldn’t be able to edit)
 - b. Community Emails
 - i. Manage your Opt-out list – where you can select communities you do not wish to receive any emails (multi-select is allowed)
 1. Please refer to the Community Notifications page to complete your notification settings.

Community Emails

Emails typically sent from Community Admins or the Community Manager via automation rules (ex: moderation notifications, Component Manager emails). Some automation rules-based emails may be in other categories. By default, you receive Community emails from all your Communities unless you explicitly opt-out.

[Manage Opt-out List](#)

 Yes

NOTE: Discussion and consolidated digest settings are on the [Community Notifications](#) page.

- c. Participation Emails – leave as is.
- d. Promotional Emails – leave as is.
- e. Smart Newsletter – leave as is.

Notification Settings

Yes

Automatically set community discussion emails to "No Email" when a community is added to a consolidated digest.

3 Communities

Community Name A-Z

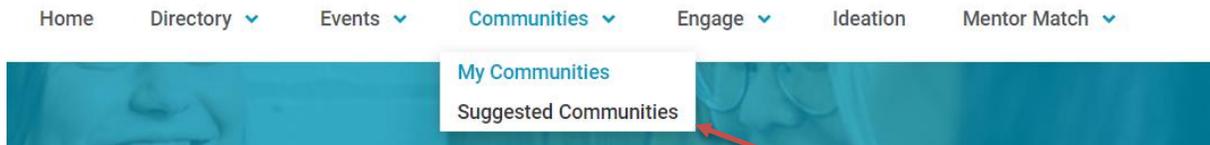
Community	Discussion Email	Consolidated Daily Digest	Consolidated Weekly Digest
Council on Membership and Professional Development	Daily Digest <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaged Leaders Network	Daily Digest <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>
House of Delegates	<i>Discussion not configured.</i>	<input type="checkbox"/>	<input type="checkbox"/>

5. Community Notifications – this area controls the cadence of notifications for each community in which you have access.
 - a. Set cadence of notifications for each community
 - i. Discussion Email -refers to the Discussion/Threads tab. This area is where members will post messages to share their thoughts and ideas on a particular topic, ask questions for support, and answer the questions posed by others to offer help and guidance. This functionality allows members to keep track of all comments without having to manage their personal inbox.
 1. The options:
 - a. Real Time – like normal emails, this option sends out notifications after every message.
 - b. Daily Digest – this option consolidates all messages for the day and sends one.
 - c. No Email – this option sends no notifications of messages. NOT recommended for your council/committee work.
 - ii. Consolidated Daily Digest – takes all activity in the committee and consolidates it to one email a day. Please note that when agenda books or minutes are published, that notification will override your personal settings.
 - iii. Consolidated Weekly Digest - takes all activity in the committee and consolidates it to one email a day. Please note that when agenda books or minutes are published, that notification will override your personal settings.

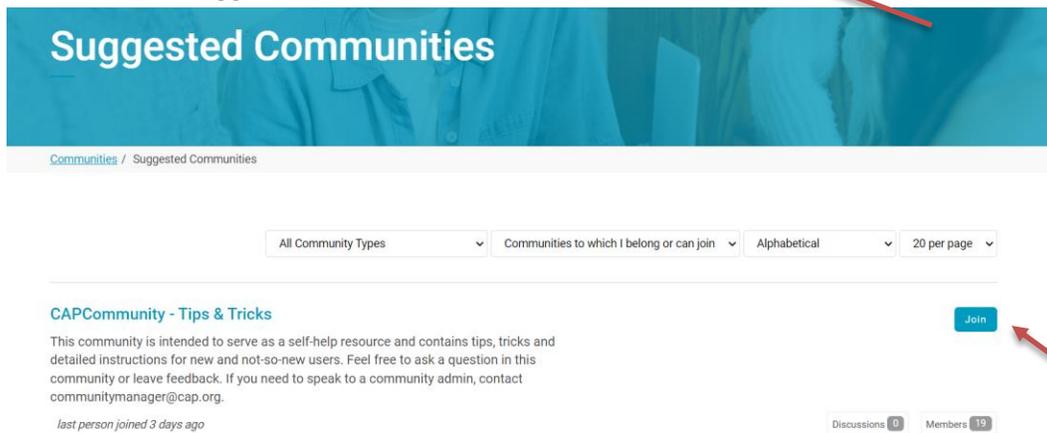
JOIN THE TIPS & TRICKS COMMUNITY

This community is intended to serve as a self-help resource and contains, tips, tricks, and detailed instructions for new and not-so-new users. Feel free to ask a question in this community or leave feedback. If you need to speak to a community admin, contact communitymanager@cap.org.

1. Click on My Communities and select Suggested Communities



2. Under Suggested Communities, click the blue Join button.



WORKSPACE

The Workspace Tab will be used for current Council/Committee Agenda Books as well as approval of minutes by using the balloting function.

1. How to download your Agenda Book.
 - a. Option 1 – when CAP Staff upload the Agenda Book to the Workspace it will trigger an email to all members of the Council/Committee. Example below:

Submitter's message
Agenda book for April 14 ITLC meeting.
-- Mr. Viral Mehta

Document Name: [April 14, 2023 Agenda Book](#)

Description
Attached please find the agenda book for the April 14, 2023 ITLC meeting. We look forward to seeing you (in-person or virtually) then.

- V
[Download Latest Revision](#)

Submitter: Mr. Viral Mehta
Group: Information Technology Leadership Committee (ITLC)
Folder: April 14, 2023 ITLC Meeting
Date submitted: 2023-04-07 02:31:34

- i. You can click on either of the hyperlinks (in your email client) and it will take you to the CAP Community to login. Once logged in the document will open automatically.
- b. Option 2 – Log in directly via <https://community.cap.org/home>
 - i. Navigate to Communities, My Communities and select your Council or Committee from the list on the page.

Home Directory ▾ Events ▾ Communities ▾

Communities ▾

My Communities

- ii. Navigate to the Workspace Tab



- iii. Click the blue Download button and it will automatically open.

BALLOTS

Ballots will be used two ways: Approving meeting minutes, and General voting. See examples below:

1. Approve meeting minutes - Voting Members of the council/committee will receive an email from staff (see example below)

"Approval of Meeting Minutes; July 8 ITLC" has opened.

Ballot Title: [Approval of Meeting Minutes; July 8 ITLC](#) ←

Question
Should Meeting Minutes; July 8 ITLC be approved?

Closing Date: Fri, May 19 2023 11:00 am CDT

Description
Hello,
As a voting member of the ITLC, please review the minutes of the July 8, 2023 ITLC meeting and complete the accompanying ballot.

Vote ←

- Yes
- No
- Abstain

- a. Click the hyperlink Ballot Title – that will take you to login to the CAP Community so you can download the document to read and then approve.
- b. You can also click on the hyperlink Vote which will do the same thing.
- c. To download the document, you'll click on the Download button.
 - i. Ballot Options and Commenting (recommendations)



1. Yes – No additional comments are needed however if you see a small typo, you can add that comment, but you are still approving the minutes after the small typo is fixed.

2. No – please use the comments to indicate why you are voting against approving the minutes (substantially missing or incorrect information in the minutes). You'll also use the commenting function to indicate what issues you have.
 3. Abstain – please use the comment to indicate why you are abstaining (the main reason would be if you didn't attend the meeting).
 - ii. If you have edits to make, you will identify them in the comments as you are unable to make the changes in the document directly. Staff will be able then to collate all comments to make the needed changes. If needed changes are extensive, staff will reopen the ballot and you will be asked to vote again.
2. General Voting – this type of ballot will be for non-official items. See example below:
- a. Staff could use this function to send out a ballot regarding your attendance at the next face-to-face meeting.
 - b. Voting will happen the same as the ballot above.

"Meeting Attendance" has opened.

Ballot Title: [Meeting Attendance](#)

Question

Will you attend our next in-person meeting?

Closing Date: Fri, May 19 2023 11:00 am CDT

Description

Good afternoon,

Our next in-person meeting is scheduled for July 15, 2023 in San Diego, CA. Please indicate your intended attendance.

[Vote](#)

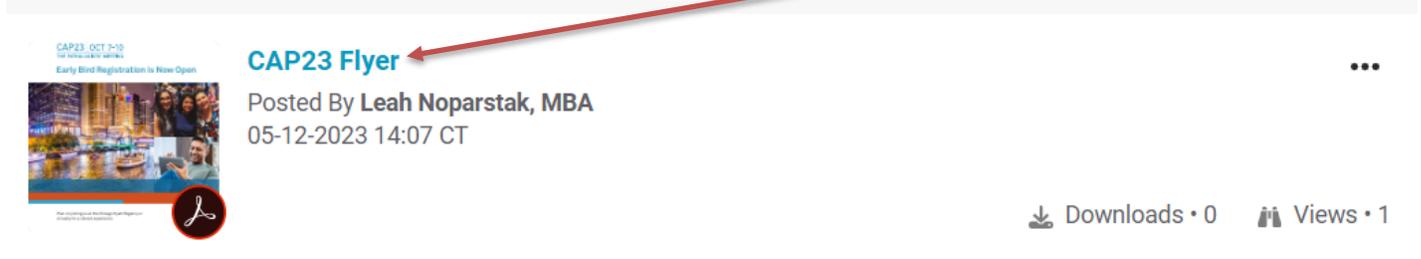
- **Yes - In-Person**
- **Yes - Virtual**
- **No - I cannot attend at all**

LIBRARY TAB

Community Home **Workspace** Threads 55 Blogs 1 Events 2 Members 50 **Library 6**

The Library Tab will be used mostly for archival information, shared files, and multimedia.

1. Download a file within the Library.
 - a. Click on the item (title).
 - b. Click on Download.



A screenshot of a library item card. On the left is a thumbnail image for 'CAP23 OCT 7-10' with the text 'Early Blind Registration is Now Open'. To the right of the image is the title 'CAP23 Flyer' in blue, with a red arrow pointing to it. Below the title, it says 'Posted By Leah Noparstak, MBA' and '05-12-2023 14:07 CT'. On the right side of the card, there are icons for 'Downloads • 0' and 'Views • 1'. A red arrow also points to the 'Downloads • 0' text.



Posted By **Leah Noparstak, MBA**
05-12-2023 14:07 CT

Download

CAP23 Flyer

 CAP23 Flyer.pdf 1.58 MB

Viewed • 2 Downloaded • 0 Like • 0

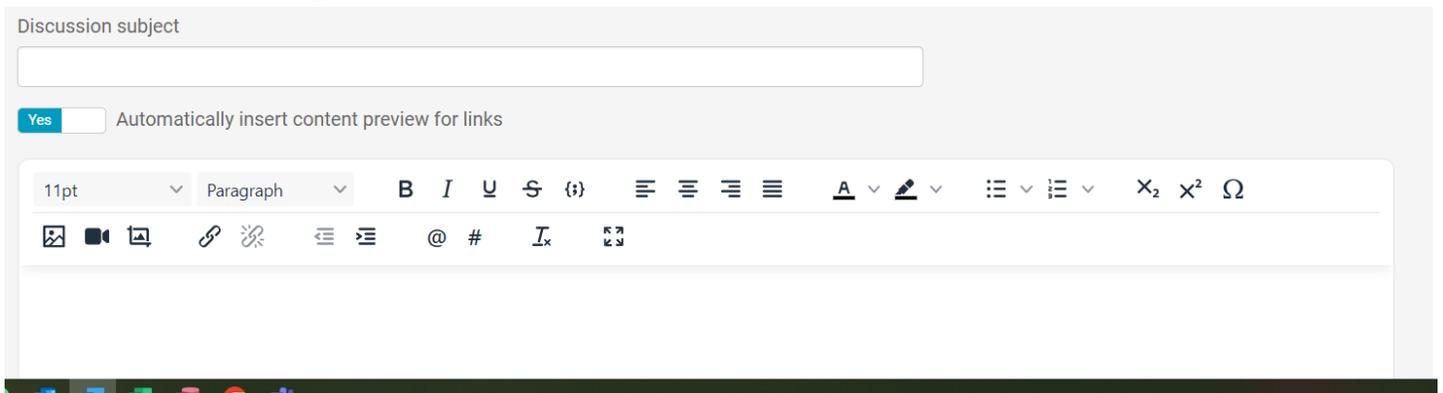
Following

DISCUSSIONS/THREADS

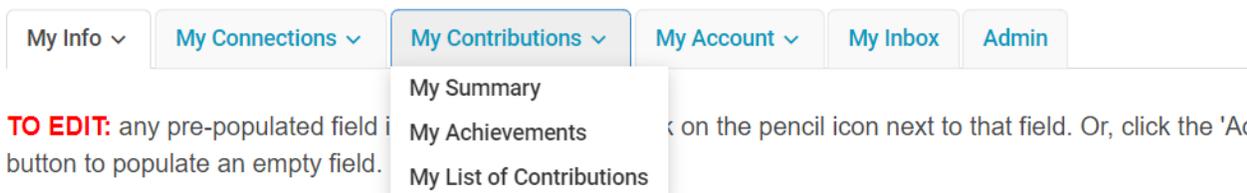


The Discussion/Threads area is where members can post messages to share their thoughts and ideas on a particular topic, ask questions for support, and answer the questions posed by others to offer help and guidance. This functionality allows members to keep track of all comments without having to manage their personal inbox.

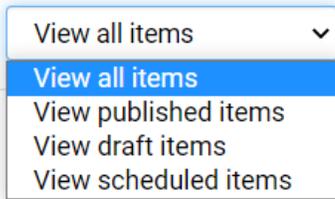
1. Login to post a discussion.
 - a. Navigate to the Discussion/Threads tab.
 - b. Click on Start New Thread. 
 - c. Give the post a Subject Line & begin typing. You have the option to add formatting in your message (just like a “regular” email).



- d. When complete you can:
 - i. Post – sends it immediately.
 - ii. Schedule – you can identify what date/time you’d like the message to be sent.
 - iii. Save as a Draft – see instructions below on how to retrieve a message saved as a draft.
2. Another option is to send an email from your email client and add your council/committee’s specific email (you can obtain this email this from your committee manager).
 - a. Added functionality of this option is that you can respond to emails from your email client without logging into the CAP Community and your message will be included in the queue of responses.
 - i. You can respond to a specific person privately (within the CAP Community).
 - ii. You can respond to multiple others’ answers using the @function in the message (within the CAP Community).
3. Where does my message go if I save it as a Draft? You can retrieve any draft message you’ve composed in the CAP Community by going to your Profile.
 - i. Click on My Contributions, My List of Contributions



- ii. You can find a list of all messages posted in your council/committee and filter them via the View all items box in the right-hand corner.



- iii. Click on View draft items.
- iv. Click on edit draft.

AUTO-SAVED Saved By [Leah Noparstak, MBA](#) 03-23-2023 10:27

Found In : [SANDBOX for Committee staff \ edit draft](#)

- v. Complete your message; and post it.

EVENTS



1. The Events area will be used several ways (see list below) and calendar items can be downloaded to your personal calendar by clicking on the event and then selecting Download to Your Calendar (it will open an event.ics file that you can open and save to your calendar).

[Download to Your Calendar](#)

- a. Types of events in this tab:
 - i. Face-to-face meetings
 - ii. Conference Calls
 - iii. Dinners at in-person meetings