

# GrowthZone: Info Hub Pt. 1: Setup & Options

# Info Hub – Setup and Options Agenda

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## Overview

## Access Levels

- End User (Member) Access Levels
- How to Customize or Create

## Info Hub Login Settings

- Standard Settings
- Advanced Options

## Info Hub Settings

- Colors
- Messaging
- Other Options

- Terms & Conditions (optional)

## Resources

- Manage/add via the back office
- View/add via the Info Hub

## Forum (Optional)

- How to Enable
- Manage Member Discussion
  - Add a forum
  - Add Moderator(s)
  - Limit Access

# Info Hub – Overview

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GrowthZone's Info Hub is a member center that enables your users to access key information and actively engage with your organization and each other. The Info Hub allows users to search the directory of other members, see and register for upcoming events, submit events, sign up for lists and committees, view their membership details, view and complete billing-related actions, see completed certifications, and more.

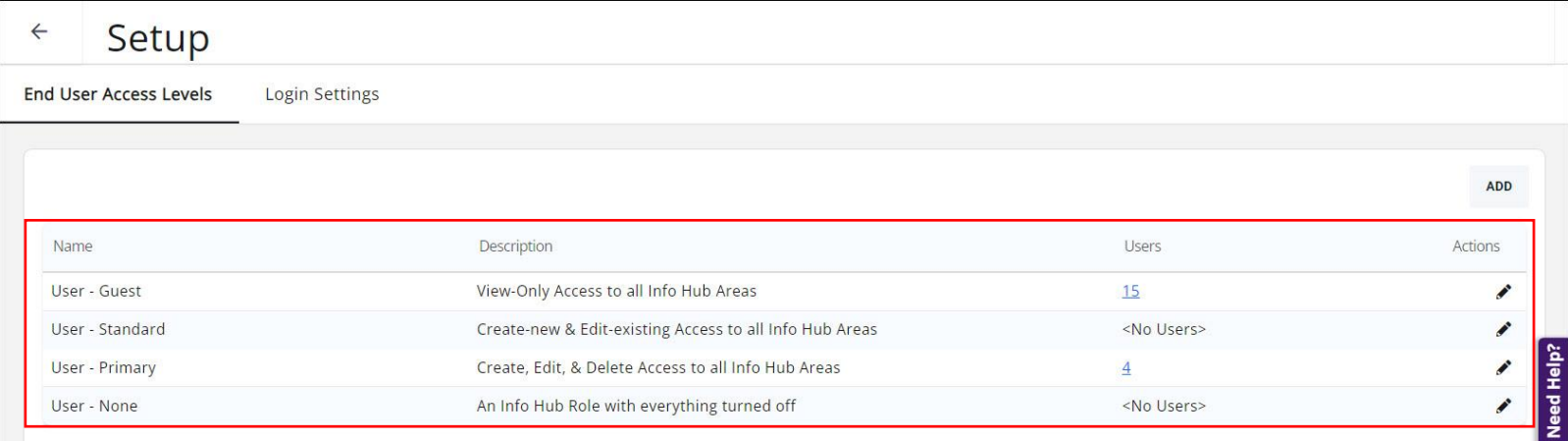
Knowledge Base: [Info Hub Overview \(with video tour\)](#)





# Info Hub – Access Levels

Setup -> Staff and User Access -> End User Setup

4 User Access Levels set up for all databases:

- User – None
- User – Guest
- User – Standard
- User – Primary

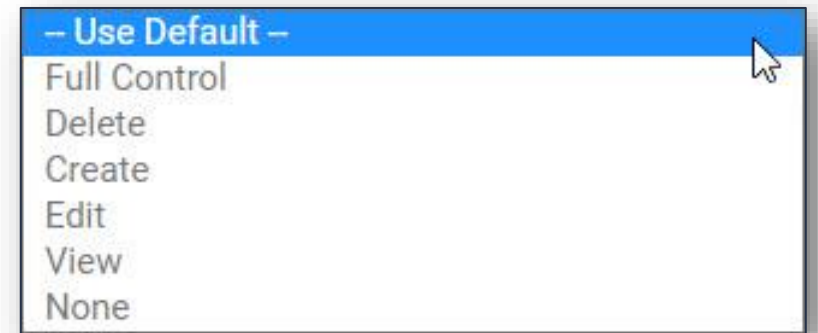


Name	Description	Users	Actions
User - Guest	View-Only Access to all Info Hub Areas	15	
User - Standard	Create-new & Edit-existing Access to all Info Hub Areas	<No Users>	
User - Primary	Create, Edit, & Delete Access to all Info Hub Areas	4	
User - None	An Info Hub Role with everything turned off	<No Users>	

# Info Hub – Access Levels

5 Levels\* of hierarchical access/ability:

- None – User cannot view/access
- View – User can view
- Edit – User can change/update existing data
- Create – User can add new data/content
- Delete – User can delete content

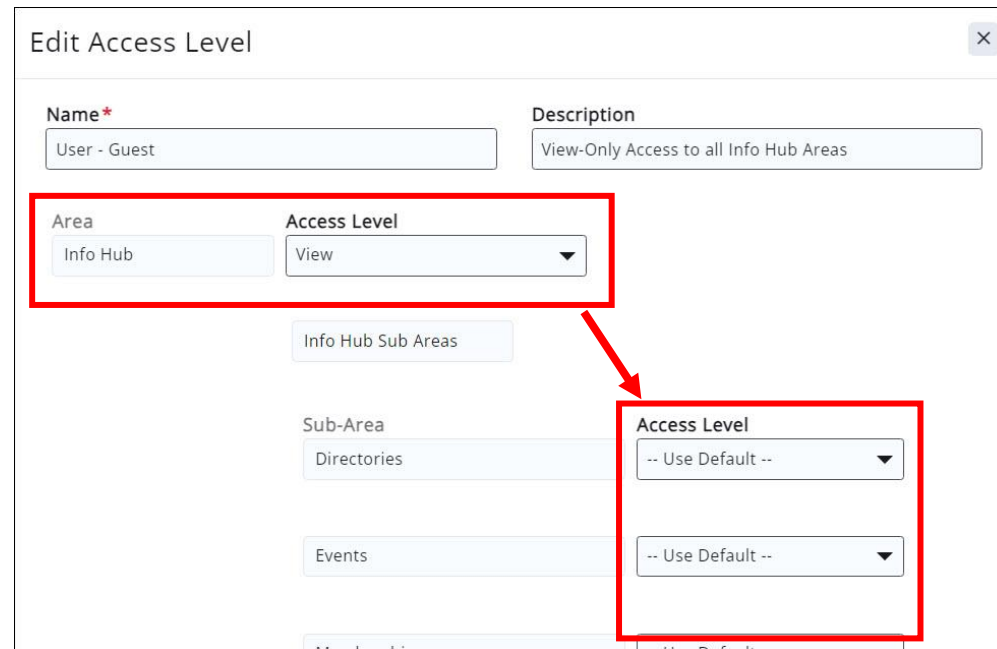


*\*Full Control technically has the same abilities as Delete but may grant additional permissions; using Delete is recommended UNLESS functionality is impacted*

Knowledge Base: [Create a New Info Hub Access Level for Members](#)

# Info Hub – Access Levels

You can apply one single “blanket” permission for everything in the Info Hub, but **it is recommended to set custom access for each specific area.**

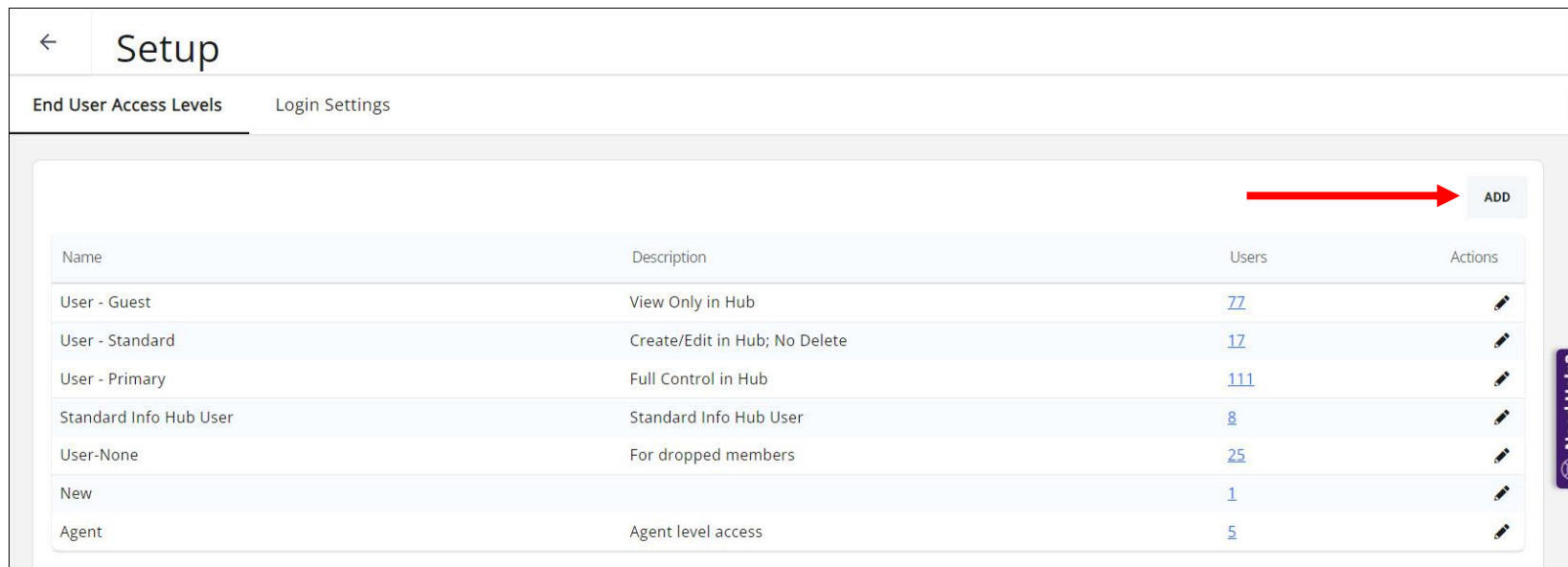


The screenshot shows the 'Edit Access Level' form with the following fields:

- Name\***: User - Guest
- Description**: View-Only Access to all Info Hub Areas
- Area**: Info Hub
- Access Level**: View
- Info Hub Sub Areas**: A section containing sub-areas with their own access levels:
  - Sub-Area**: Directories, **Access Level**: -- Use Default --
  - Sub-Area**: Events, **Access Level**: -- Use Default --
  - Sub-Area**: Membership, **Access Level**: -- Use Default --

# Info Hub – Access Levels

You can either use the pre-configured user access levels as they are, you can edit them to your preference, or you can set up new/additional access levels as needed.



The screenshot shows a mobile application interface for 'Setup'. The main heading is 'Setup', with a back arrow on the left. Below it, there are two tabs: 'End User Access Levels' (selected) and 'Login Settings'. The main content area displays a table of user access levels. A red arrow points to an 'ADD' button in the top right corner of the table area. On the right side of the screen, there is a vertical purple button labeled 'Need Help?' with a question mark icon.

Name	Description	Users	Actions
User - Guest	View Only in Hub	77	
User - Standard	Create/Edit in Hub; No Delete	17	
User - Primary	Full Control in Hub	111	
Standard Info Hub User	Standard Info Hub User	8	
User-None	For dropped members	25	
New		1	
Agent	Agent level access	5	

# Info Hub – Access Levels

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## Creating a new user access level

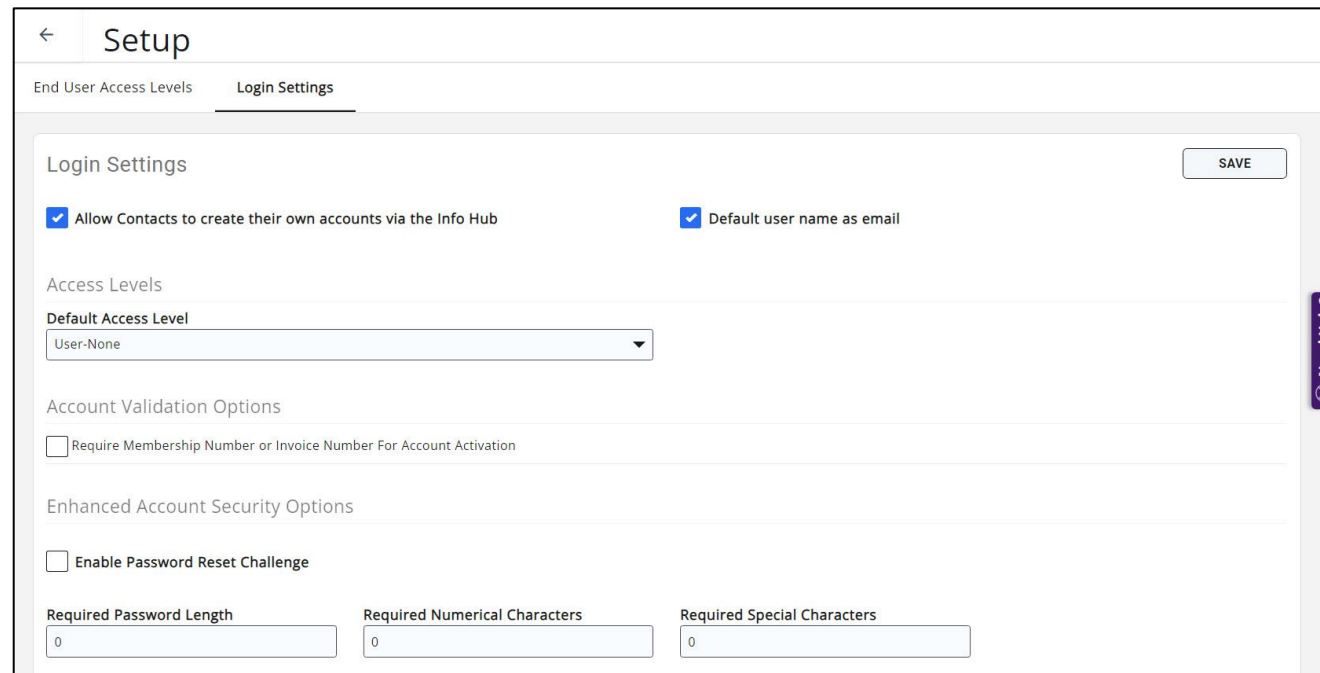
- Click the “Add” button
- Give it a name/description
- Select Access Level Type of “User”
- Scroll down to “Info Hub” and select a level, then enable the “Set Custom Access for Specific Area(s)” checkbox
- Configure access for each area as preferred
- Click “Done”

Knowledge Base: [Create a New Access Level - Users](#)



# Info Hub – Login Settings

Setup -> Staff and User Access -> End User Setup -> Login Settings



The screenshot shows a web-based configuration interface for 'Login Settings'. At the top, there is a navigation bar with a back arrow and the word 'Setup'. Below this, there are two tabs: 'End User Access Levels' and 'Login Settings', with the latter being the active tab. The main content area is titled 'Login Settings' and includes a 'SAVE' button in the top right corner. The settings are organized into several sections:

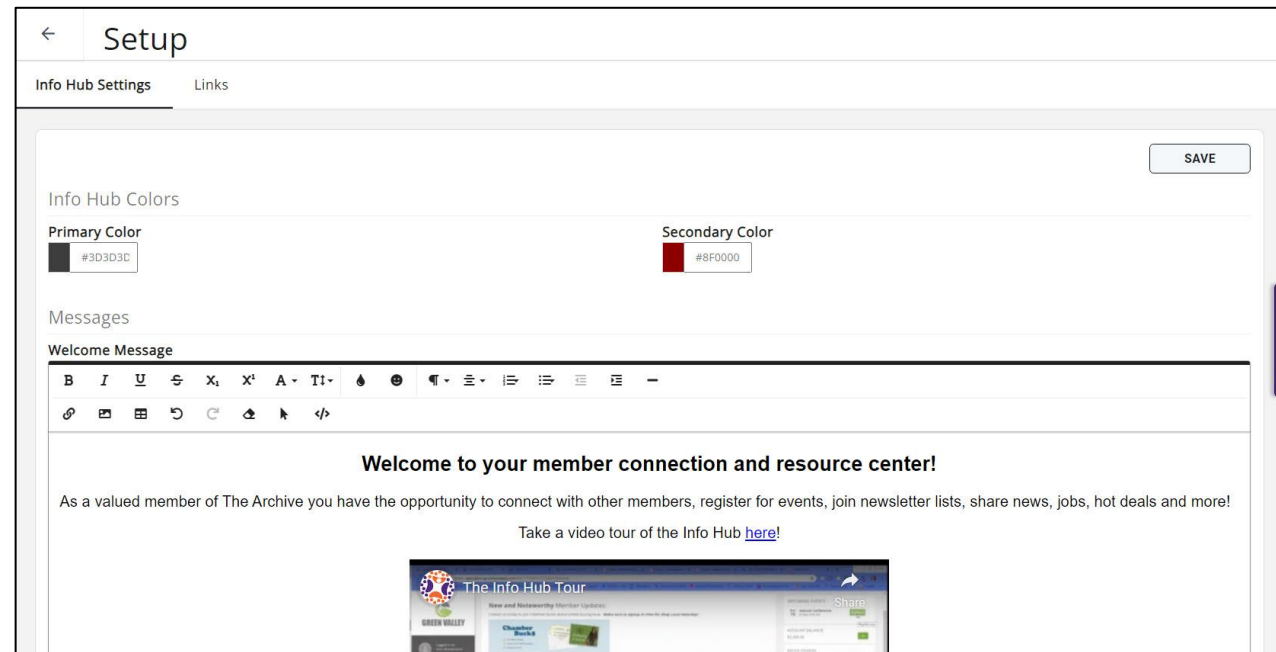
- Login Settings:** Contains two checked checkboxes: 'Allow Contacts to create their own accounts via the Info Hub' and 'Default user name as email'.
- Access Levels:** Features a 'Default Access Level' dropdown menu currently set to 'User-None'.
- Account Validation Options:** Includes an unchecked checkbox for 'Require Membership Number or Invoice Number For Account Activation'.
- Enhanced Account Security Options:** Includes an unchecked checkbox for 'Enable Password Reset Challenge'.
- Required Password Length:** A text input field containing the value '0'.
- Required Numerical Characters:** A text input field containing the value '0'.
- Required Special Characters:** A text input field containing the value '0'.

A vertical sidebar on the right side of the form contains a 'Need Help?' button with a question mark icon.

Knowledge Base: [Set Up Member Access to the Info Hub](#)

# Info Hub – Settings

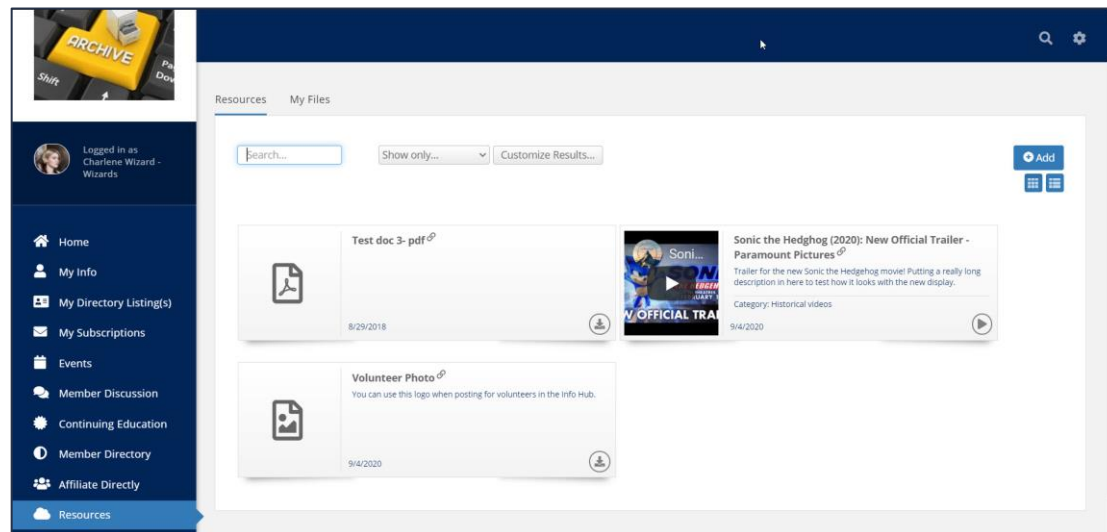
Setup -> Website -> Info Hub Settings



Knowledge Base: [Customize Info Hub Colors](#)

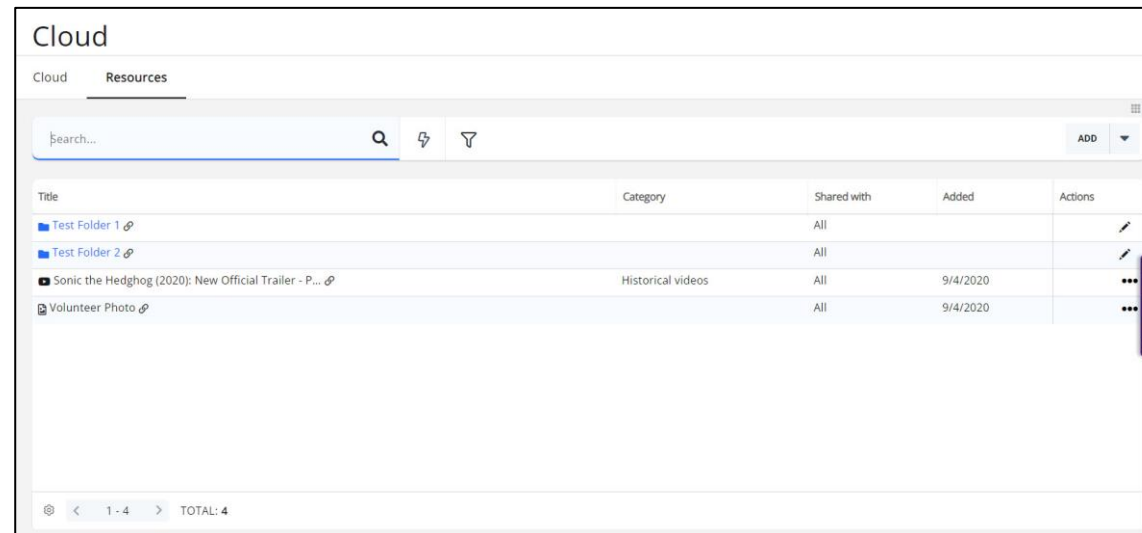
# Info Hub - Resources

Via the Info Hub, you and your members can easily share resources. Your members will also be able to upload files to a My Files folder that would only be visible to that member, but also attached to the member's files tab in the back office. Members may add files, images, videos, etc.



# Info Hub – Resources (back office)

On the Cloud Resources tab, staff can add and manage Info Hub resources from the back office. Staff can easily add, edit, delete, categorize and share resources with contacts in lists or committees without needing to log in to the Info Hub.



The screenshot displays the 'Cloud Resources' interface. At the top, there is a search bar with a magnifying glass icon, a refresh icon, a filter icon, and an 'ADD' button with a dropdown arrow. Below this is a table with the following columns: Title, Category, Shared with, Added, and Actions. The table contains four rows of data:

Title	Category	Shared with	Added	Actions
Test Folder 1		All		[Edit]
Test Folder 2		All		[Edit]
Sonic the Hedgehog (2020): New Official Trailer - P...	Historical videos	All	9/4/2020	[More]
Volunteer Photo		All	9/4/2020	[More]

At the bottom of the table, there is a pagination bar showing '1 - 4' and 'TOTAL: 4'. A vertical 'Need Help?' button is located on the right side of the table.

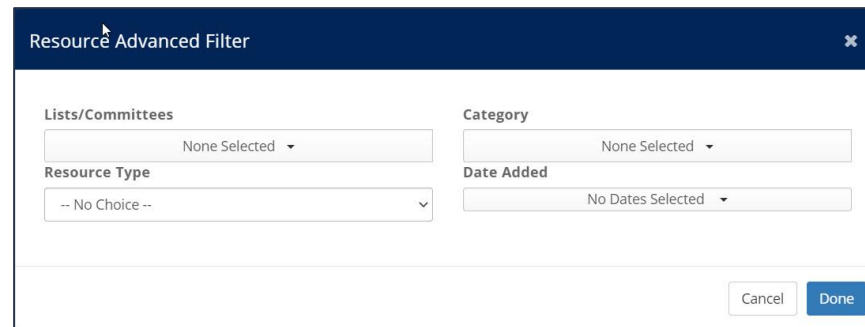
Knowledge Base: [View Info Hub Resources via the Cloud](#)

# Info Hub – Resources (Info Hub)

Members must have View access to the Info Hub to see available resources. Additionally, if resources have been limited to certain lists/committees (optional), the members will only see the resources if they belong to that list/committee.

The list of resources may be filtered by clicking the Customize Results option, and selecting from the following filters:

- Resource Type
- Date Added
- Lists/Committees
- Category



The screenshot shows a dialog box titled "Resource Advanced Filter" with a close button (X) in the top right corner. It contains four filter sections, each with a dropdown menu:

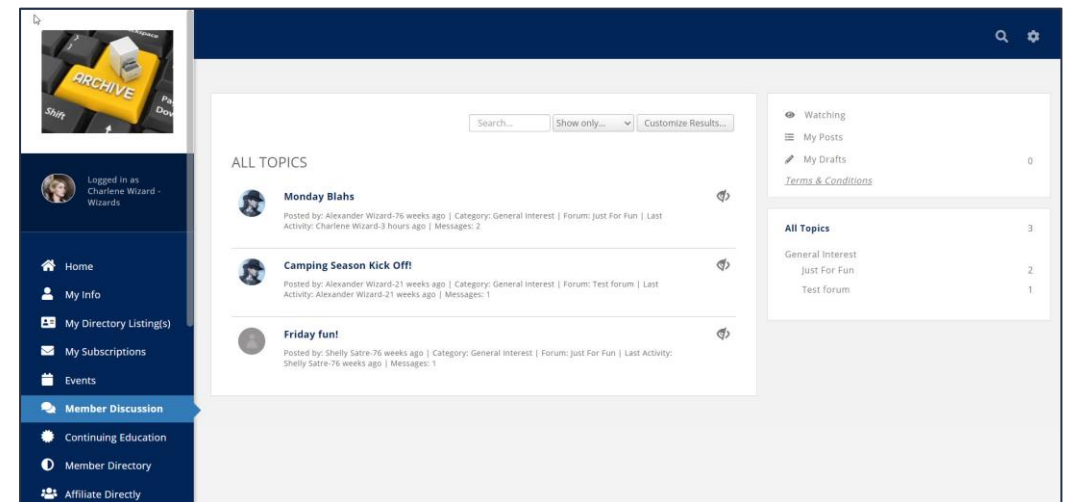
- Lists/Committees:** A dropdown menu showing "None Selected".
- Category:** A dropdown menu showing "None Selected".
- Resource Type:** A dropdown menu showing "-- No Choice --".
- Date Added:** A dropdown menu showing "No Dates Selected".

At the bottom right of the dialog box, there are two buttons: "Cancel" and "Done".

Knowledge Base: [Add Resources in the Info Hub](#)

# Info Hub – Forum

The Info Hub Forum gives you the ability to bring additional value to members by allowing them to network with like-minded individuals who may be resources for them. The Info Hub Forum provides a way for your members to ask each other questions, exchange information and ideas, share resources, and more.



# Info Hub - Forum

The Info Hub Forum is included with your GrowthZone subscription, but it is an optional component of the Info Hub. It can be enabled in Setup -> Forum -> General Settings.

**Forum Settings** SAVE

We've recently released our Forum feature. *This new feature is in Beta*, meaning we are continuing to improve its functionality.

**Before you check the "Enable Forum in Info Hub" checkbox** (below), you will want to ensure:

1. You have **set up your Categories and Forums**. To do this go to Setup> Manage Forum. In order for your Info Hub users to post Topics, Staff members will need to set Forum Categories and create Forums for users to post to. This is what will build the structure in the right hand navigation of your forum. [See example](#).
2. You have **set the permission levels** of those that you wish to participate in the Forum to "Create". To do this go to Setup> Access Levels> Choose an access level> Info Hub, choose custom> and set Forum to "Create" instead of None. [See a screenshot](#).

Once you check the "Enable Forum in Info Hub" checkbox, the forum feature will then be visible to your Info Hub users.

For more information on setup and how members can utilize the forum, [visit our support wiki](#).

**Enable Forum in Info Hub** Terms and Conditions for Forum  +

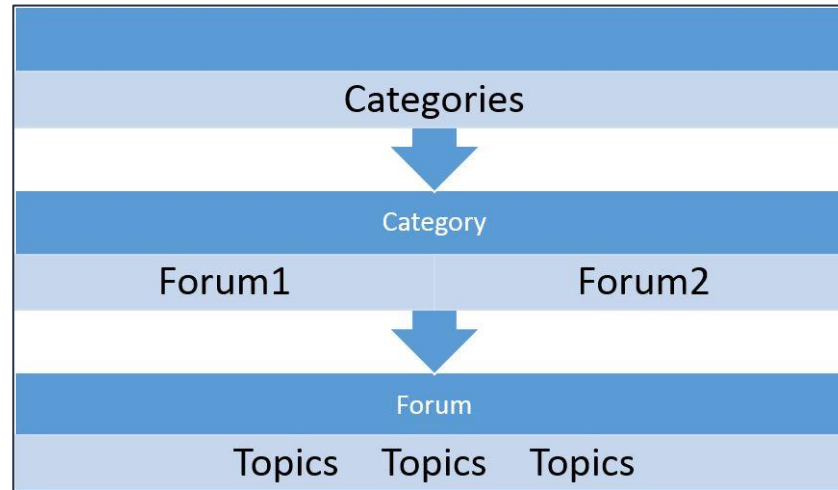
[Need Help?](#)

*NOTE: Access to the Forum is permission driven. Your members must be given Create access to participate in the forum.*

Knowledge Base: [Info Hub Forum](#)

# Info Hub - Forum

Forums are structured via Forum Categories, Forums, and Topics.



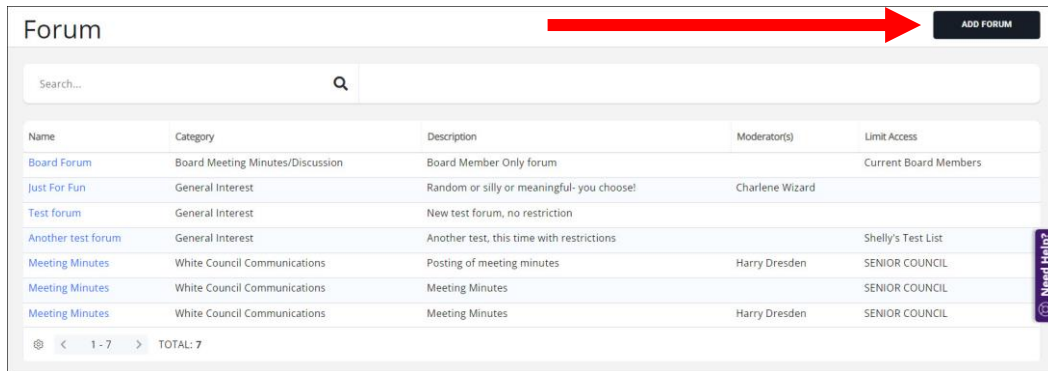
Once the Forum is enabled, you will need to set up your Forum categories in Setup -> Categories -> Forum Categories

Knowledge Base: [Configure Forum Categories](#)



# Info Hub - Forum

When your Forum Categories are set up, you can then begin adding Forums.

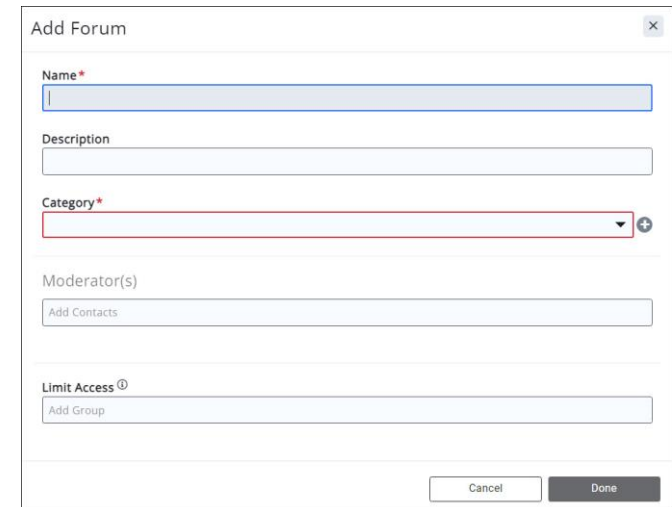


Name	Category	Description	Moderator(s)	Limit Access
Board Forum	Board Meeting Minutes/Discussion	Board Member Only forum		Current Board Members
Just For Fun	General Interest	Random or silly or meaningful- you choose!	Charlene Wizard	
Test forum	General Interest	New test forum, no restriction		
Another test forum	General Interest	Another test, this time with restrictions		Shelly's Test List
Meeting Minutes	White Council Communications	Posting of meeting minutes	Harry Dresden	SENIOR COUNCIL
Meeting Minutes	White Council Communications	Meeting Minutes		SENIOR COUNCIL
Meeting Minutes	White Council Communications	Meeting Minutes	Harry Dresden	SENIOR COUNCIL

Go to Setup -> Forum -> Manage Member Discussion.

Click the "Add Forum" button

Complete the setup of the forum. You can enter a description, assign moderators, and limit access to certain lists/committees if you wish.



Add Forum

Name \*

Description

Category \*

Moderator(s)

Limit Access <sup>Ⓢ</sup>

Cancel Done

Knowledge Base: [Set up Your Forums](#)

# Questions?

# Training and Support

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## **Customer Service Hours:**

**Phone:** 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

**Chat:** 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

**Online Support Documentation:** [GrowthZone Knowledge Base](#) »

**Online Training Calendar:** [Training Event Calendar](#) »

**Live Chat:** [GrowthZone Support Portal \(chat on far right\)](#) »