NAMI Affiliate
Profile Center Contact Manual

Standards of Excellence/Center for Excellence
November 2013
# Table of Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. NAMI Affiliate Profile Center Contact Training Timetable</td>
<td>3</td>
</tr>
<tr>
<td>II. NAMI Affiliate Profile Center Contact Scope of Work</td>
<td>4</td>
</tr>
<tr>
<td>III. Introduction</td>
<td>5</td>
</tr>
<tr>
<td>IV. Training</td>
<td></td>
</tr>
<tr>
<td>1. Accessing the NAMI Profile Center</td>
<td>6</td>
</tr>
<tr>
<td>2. Logging in</td>
<td>6</td>
</tr>
<tr>
<td>3. Welcome Page</td>
<td>7</td>
</tr>
<tr>
<td>4. Accessing and Updating Metrics Libraries</td>
<td>9</td>
</tr>
<tr>
<td>5. Accessing and Uploading Shared and Secured Documents</td>
<td>12</td>
</tr>
<tr>
<td>6. Exiting the NAMI Profile Center</td>
<td>17</td>
</tr>
<tr>
<td>V. Communicating NAMI Affiliate Metrics Update and Document Upload Progress</td>
<td>18</td>
</tr>
<tr>
<td>VI. Tips &amp; Troubleshooting</td>
<td>19</td>
</tr>
<tr>
<td>VII. Next Steps for the Trained NAMI Affiliate Profile Center Contacts</td>
<td>21</td>
</tr>
<tr>
<td>VIII. Conclusion</td>
<td>22</td>
</tr>
</tbody>
</table>
I. NAMI Affiliate Profile Center Contact Training Timetable

**Time:** 1 hour

**NAMI AFFILIATE PROFILE CENTER CONTACTS PREP:**

- Get a free email address if you do not already have one – recommend using Gmail by Google
- Use training webinar sign-in information sent from NAMI State Organization
- Access Internet Explorer as your browser for the training session (Chrome, Safari, Mozilla, Netscape, etc. can be used but are not as compatible with the NAMI Profile Center as Internet Explorer)
- Ask 2 NAMI Affiliate representative(s) to join in the training as back-ups.

**Welcome to the NAMI Profile Center Training** (5 minutes)

**Introduction to the NAMI Profile Center** (5 minutes)

**Review NAMI Affiliate Profile Center Manual** (20 minutes)

- Accessing the NAMI Profile Center
- Accessing Metrics and Documents
- Viewing and Editing Shared and Secured Metrics
- Accessing Shared and Secured Documents and Uploading Documents
- Editing a Document in the NAMI Profile Center
- Exiting the NAMI Profile Center

**Troubleshooting Tips – NAMI Affiliates with computer issues** (5 minutes)

**Getting Started with NAMI Affiliates** (20 minutes)

- Expectations of the NAMI Affiliate contact
- Review documents all NAMI Affiliates must submit

**Closing Q&A** (5 minutes)
II. NAMI Affiliate Profile Center Contact Scope of Work

The NAMI Affiliate will choose 2 representatives to serve as the immediate points of contact for the NAMI Affiliate’s use of the NAMI Profile Center. One representative will serve as the primary contact, and the other as a backup in the case of an unexpected or prolonged absence. The NAMI Affiliate’s contact people receive training, guidance and technical assistance as needed from their NAMI State Organization.

The NAMI Affiliate Profile Center Contact responsibilities are:

- Familiarize yourself with the NAMI Affiliate Profile Center Manual and any instructions that the NAMI State Organization contact will provide in advance of the scheduled training.

- Once training is completed obtain the User name and password.

- Familiarize yourself with the required list of documents for Re-Affiliation.

- Serve as cheerleader for NAMI Affiliate to provide the documentation and information so it can be updated and uploaded to the NAMI Profile Center routinely.

- Work with your NAMI Affiliate team on collecting, saving and organizing documents in a folder on the NAMI Affiliate’s computer, CD, flash drive or any other safe device from which documents can be uploaded to the NAMI Profile Center.

- Upload required documents and complete updated metrics lists information.

- Once Re-Affiliation is complete, continue to encourage NAMI Affiliate leaders to provide the ongoing documentation that will be required once the process is successfully completed.

- Contact the NAMI State Organization Profile Center contact for any issues such as technical support, documentation requirements or suggestions for improvement to the Profile Center functionality.
III. Introduction

The NAMI Chartering/Re-Affiliation Profile Center (“NAMI Profile Center”) is an important tool in the Re-Affiliation process – for both NAMI State Organizations and NAMI Affiliates. The NAMI Profile Center, built on a Microsoft SharePoint 2007 platform, is designed to assist NAMI Affiliates in reporting and maintaining information and documents required for the Re-Affiliation process. The NAMI Profile Center is an online document library for crucial organizational information. Through the NAMI Profile Center, NAMI Affiliates will be able to upload and maintain important organizational documents such as the bylaws and minutes of meetings of the Board of Directors.

How to get started with the Profile Center

<table>
<thead>
<tr>
<th>NAMI Profile Center Manager will...</th>
<th>NAMI State Organization will...</th>
<th>NAMI Affiliate will...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinate as needed use of the NAMI Profile Center training site when multiple trainings are scheduled if they overlap.</td>
<td>Notify the NAMI Profile Center contact when trainings are scheduled. NAMI will notify trainers whenever there are duplicate trainings occurring to avoid the confusion with other test documents appear during the online demonstrations.</td>
<td>Designate 2 people to be trained by the NAMI State Organization Profile Center contact to become NAMI Affiliate Profile Center Contacts.</td>
</tr>
<tr>
<td>Open the NAMI Profile Center to NAMI Affiliates following state training.</td>
<td>Conduct online NAMI Profile Center training for NAMI Affiliate Profile Center contacts.</td>
<td>Attend online NAMI Profile Center Training.</td>
</tr>
<tr>
<td>Send the unique User name and Password login credentials to the newly trained NAMI Affiliate Profile Center contacts.</td>
<td>Send NAMI Profile Center manager the NAMI Affiliate Profile Center contacts’ name, email and phone number.</td>
<td>Provide NAMI State Organization Profile Center contact emails and phone numbers.</td>
</tr>
<tr>
<td>Notify the NAMI State Organization Profile Center contact the credentials have been forwarded, and the NAMI Affiliate is now able to access and begin using the NAMI Profile Center.</td>
<td>Serve as cheerleader for NAMI Affiliate to update information and upload documentation to the NAMI Profile Center routinely.</td>
<td>Receive the unique User name and Password login credentials and begin using the NAMI Profile Center.</td>
</tr>
<tr>
<td>Provide technical support and guidance as needed to the NAMI State Organization Profile Center contact.</td>
<td>Contact the NAMI State Organization Profile Center contact for any issues such as technical support, documentation requirements or suggestions for improvement to the Profile Center functionality.</td>
<td>Serve as cheerleader for NAMI Affiliate leadership to update information and upload documentation to the NAMI Profile Center routinely.</td>
</tr>
</tbody>
</table>
IV. Training

1. Accessing the NAMI Profile Center

The web address for the NAMI Profile Center is http://extranet.nami.org/profilecenter. All users should use Internet Explorer to access the NAMI Profile Center. The major internet browsers (Chrome, Safari, Mozilla, and Netscape) will work, but they do not work as well and may cause frustration for users.

To download the most current version of Internet Explorer, go to http://windows.microsoft.com/en-us/internet-explorer/download-ie. Click on the download link, and follow the prompts provided by the system to install and open Internet Explorer.

2. Logging In

The User name is different for each NAMI Affiliate. All User names start with an abbreviation of the organization’s name, and all end with @nami.org. For example, NAMI Virginia Bumble Bee would become vbumblebee@nami.org.

The Password will be provided to the NAMI Affiliate President or Executive Director, as applicable, and the designated NAMI Affiliate Profile Center Contacts by the NAMI Profile Center manager. The Affiliate Profile Center Contacts are the persons the NAMI Affiliate has designated to access the NAMI Profile Center to update metrics data and upload documents. The User name and password will ONLY be released on approval by the NAMI State Organization Profile Center Trainer and once the NAMI Affiliate Profile Center contacts’ names and contact information have been provided to NAMI.

Using Internet Explorer, the login screen will look like the screen shot below. The login pop-up may appear differently for other browsers.

Heads up!

TYPE in the User name and Password exactly as provided. The login credentials are case-sensitive and must be entered exactly as provided.
3. Welcome Page

Once the contact enters the User name and Password specific to the NAMI Affiliate, the site will redirect to the NAMI Affiliate’s Profile Center Home Page.

Once the user has logged into the NAMI Profile Center for the first time, it is highly recommended that the user take this important step. Microsoft Internet Explorer has gone through several updates since the NAMI Profile Center was first built – these upgrades have caused compatibility issues with sites built on the Microsoft SharePoint 2007 platform. Fortunately, Microsoft built in a “fix” for this issue in their subsequent upgrades.

At the top of the internet window where the URL that takes you to the NAMI Profile Center is typed are several buttons. Two of them are the usual Refresh and Stop buttons. The new one is the Compatibility button (black arrow). It looks like a BOX that is BROKEN IN TWO PIECES. Clicking that button should resolve the issue.
Once that button is clicked, it DOES NOT need to be clicked again unless the entire browser resets – however, it is recommend that the user check that the compatibility button is highlighted each time the user logs into the site.

The NAMI Profile Center has three main libraries for information shown on the left side toolbar (green arrows):
- Shared Metrics
- Secured Metrics
- Documents (Within Documents, there are two areas. This will be discussed further in section IV, 5.)
  - Shared Documents
  - Secured Documents.

The NAMI Profile Center also now includes links to important information related to NAMI Standards of Excellence (black arrow). NAMI State Organizations and NAMI Affiliates can directly access tools and templates needed to move forward with Re-Affiliation.
4. Accessing and Updating Metrics Libraries

The Shared and Secured Metrics libraries serve as a place to share organizational information about the NAMI Affiliate for quick reference. The Shared Metrics include such information as staff or primary contacts, types of programs offered, website address. The Secured Metrics, which is only viewable by the NAMI Affiliate and NAMI, includes revenue source information.

The Shared or Secured Metrics can be accessed two ways:

1. Click on the Shared Metrics or Secured Metrics in the left side toolbar on the screen (black arrows); or,

2. On the body of the page, place the mouse cursor over the NAMI Affiliate name, and a yellow drop down arrow will appear. Click on the arrow (green arrows), and from the drop down menu, there are options to with View Item and Edit Item. Click on the View Item to view documents. To Edit Item, click on the Edit Item in the drop down menu or the Edit Icon (red arrows).

The process for accessing Shared Metrics and Secured Metrics is the same. The difference between the two categories, Shared or Secured, is who will be able to see the information that you have entered. The Shared Metrics can be viewed by NAMI, NAMI State Organization, and the NAMI Affiliate to whom the NAMI Profile Center is assigned. However, only the NAMI Affiliate and NAMI will be able to see the Secured Metrics.
Viewing Metrics

When NAMI Affiliate’s View Item link is selected, the information that has already entered in the NAMI Affiliate’s Profile Center is shown, but the information is not able to be edited in View mode. Click on the Close button (black arrow) to exit the View Item option, or click on the Edit Item (red arrow) to make edits (as explained below).

Editing Metrics

When Edit Item from either the Edit column or the drop down menu attached the NAMI Affiliate name is selected, the user can enter and update information in the fields on the right side of the screen (black arrow). To Save the information entered, click OK (green arrow). The OK button in the Profile Center is always the Save button. Click Cancel (red arrow) if for some reason the information entered does not need to be saved.

Heads up!
Every time you click OK or Cancel button you will end up back at the Main Page.
In the Shared Metrics list there are some information fields that are for NAMI State Organizations Only and some that are for NAMI Affiliates Only. The NAMI Affiliate Only Section is toward the bottom of the list. Scrolling down to that information is necessary.

Heads up!
As with all computer work, remember to save work often. Do NOT click the Back Arrow in the top left of the screen during edits. The back arrow will undo the information that was just entered if OK was not clicked when completed.
5. Accessing and Uploading Shared and Secured Documents

The Documents section of the NAMI Profile Center is where documents required for Re-Affiliation will be uploaded, given a name, and assigned to a document category.

From the Main Page, click on Documents which can be found on the left hand side of the screen (black arrow).

You will be re-directed to a screen that says All Site Content.

At the All Site Content screen, you will see the NAMI Affiliate document libraries: Common Documents, Secured Documents, and Shared Documents. In the Common Documents area you will find informational documents that NAMI posted for your convenience. To open any of the document libraries, click on its name (black arrow).
Uploading Documents

Required documents for Re-Affiliation will be uploaded into the NAMI Profile Center in Shared Documents or Secured Documents.

Once the documents to be uploaded to the NAMI Profile Center have been gathered, follow these steps.

1. Click Upload (black arrow).

Heads up!

Clicking on the drop down arrow beside Upload sometimes gives two options: Upload Document and Upload Multiple Documents. **DO NOT** choose the Upload Multiple Documents option. As will be shown later, there are steps that need to be taken before making a document visible for all users. The Multiple Documents option bypasses that step, and any documents uploaded via the Multiple Documents option will need to be re-uploaded by the user one at a time and checked in as will be explained on the next page.
2. After Upload is clicked, the system will re-direct to the Upload Document screen. The steps to bring a document into the library are very much like attaching a document to an email. The steps are as follows:

A. Click Browse and search for the document to upload.
B. Once the document is located, click on it and click Open. (Double-clicking the document name will also work for this step.)
C. When the document name is populated in the Browse window, click OK.

3. Checking In the Document

In order to make the document visible to other users, just like in a library where books are kept for others to view, the document must be checked in. Once OK is clicked at the Upload step, the document is placed into the library and is now ready to be checked in. The steps to do that are as follows:

A. The name field will be populated with the name of the document being uploaded. The Title field can be left blank or can be used for additional information about the document that was uploaded.
B. In order to make the Profile Center more organized, each document should be assigned to its correct category. From the drop down menu at the right of the Category field, choose the option that best matches the type of document being uploaded. Double click on the best option to populate the Category field.
C. Click Check In.
When the upload is complete, the document will be added to the library.

Heads up!
Sometimes the size of the document being uploaded causes the site to move slowly. For the most part, the documents being added to the site should upload quickly, but if the system slows down because the document is larger than most, this is normal. If the document does NOT upload, refer the user first to the Tips and Troubleshooting section, Issue 2. If that does not correct the situation, the NAMI State Organization Profile Center contact should reach out to the NAMI Profile Center manager for further investigation.
Heads up!
If the users cancels the upload process at the check in stage, bypasses the step or uses the Multiple Upload option (see page 10), a document may show up in the library with a small green arrow on the Icon Type. If this happens, the document has been uploaded to the Profile Center but has not yet been checked in, and is then not visible to any other viewers but the user. If this document needs to be checked in, see the Tips & Troubleshooting Issue #3 to resolve.

Reviewing or reading uploaded documents

To read a document that has been uploaded to the NAMI Profile Center, simply click on the document name. This will open the document in Read-Only mode. When done reviewing, close the document by clicking on the Red X Button in the upper right hand corner of the document.

Updating a document in the NAMI Profile Center

When the NAMI Affiliate wants to update documents in the NAMI Affiliate libraries, the current version of the document must be edited on the NAMI Affiliate Profile Center contacts’ computer and re-uploaded. The NAMI Profile Center manager will do periodic reviews of the documentation that has been uploaded and consolidate older versions of documents in an Archive folder on the NAMI Profile Center site. Older versions will still be accessible, but they will be moved so the library is less cluttered. Please make sure to keep your original documents on your computer, CD or Flash drive.

Document storage

The NAMI Profile Center can be considered the “filing cabinet” for important documentation regarding Re-Affiliation. The documentation that is uploaded to the NAMI Profile Center remains there until directed by the NAMI Affiliate to remove it. The Profile Center manager will periodically check the sites for clean up, but this will only entail grouping documents into individual folders so that the most current information is visible in the specific libraries. Nothing is deleted without direction from the NAMI State Organization and NAMI Affiliate.
6. Exiting the NAMI Profile Center

It is always good practice to close and exit the NAMI Profile Center once done updating or uploading information. Click on the “Welcome” message (the NAMI Affiliate name will be part of that message) in the drop down menu on the top right side of the screen (black arrow). There is a Sign Out option in the drop down menu (green arrow). Click on Sign Out, which will exit the NAMI Profile Center.
V. Communicating NAMI Affiliate Metrics Update and Document Upload Progress

An additional responsibility of the NAMI State Organization Profile Center contact is to monitor the metrics update and document upload progress of the NAMI Affiliates.

As the NAMI State Organization begins to roll out Re-Affiliation with other NAMI Affiliates in your state, it will become increasingly difficult for the NAMI State Organization to know which of the NAMI Affiliates in their state are engaged and using the NAMI Profile Center. To avoid this becoming a difficult task, please stay in contact with your NAMI State Organization Contact regularly as you begin using the NAMI Profile Center.

Please report to your contacts any activity that you are taking in the system – all updates to your metrics libraries and uploads to the document libraries should be communicated to the NAMI State Organization on a regular basis. In most cases, your contact has already worked with NAMI to set up alerts that generate notifications to them at set intervals about activity in the NAMI Affiliates that have been granted access to the NAMI Profile Center. This makes it easy for them to know what is happening with the NAMI Affiliates that have been trained without having to go into each individual NAMI Affiliate Profile Center to review. However, it is still a good rule to stay in touch with the NAMI State Organization so they have a heads up that work is being done and alerts are forthcoming.

Process Note: Let your NAMI Affiliate Profile Center contacts know whether you have opted to use Alerts to notify you of activity and at what interval (Immediately, daily or weekly). Remind them that it is still helpful and recommended that they communicate to you that they are using the site so you know to look for alerts.
VI. Tips & Troubleshooting

There are some common issues that have come forward from users of the NAMI Profile Center that will very likely come from the NAMI Affiliates as they begin to use the system. As other issues arise, the NAMI Profile Center manager will update this section and re-send it as a stand-alone reference document to the NAMI State Organization Profile Center trainers.

Here are a few of the possible issues and how best to resolve them quickly and easily:

**Issue:** “The Profile Center will not log me on”/”All I get when I login to the Profile Center is a white screen.”

**Response:** Encourage the user to re-enter CAREFULLY their username and password. Remind the user that the username must be typed (not cut and pasted) into that field, and must include the “@nami.org” extension. Also ask the user to make sure the password is being entered exactly as provided – nami in lower-case letters, and the 4 numeric characters entered in the correct order. Suggest the user close out their browser completely and re-try logging in with their credentials as a way to clear what had been entered on the previous attempts.

**Issue:** “I’ve entered my metrics data/gotten to the upload step with my document, and the Profile Center seems to be stuck. The system won’t save/complete the document upload step.”

**Response:** This is very likely being caused by a compatibility issue between the Profile Center and a recently upgraded version of Microsoft Internet Explorer. Internet Explorer has built in a fix that works with users experiencing similar problems. At the top of the internet window where the URL that takes you to the NAMI Profile Center is typed are several buttons. Two of them are the usual Refresh and Stop buttons. The new one is the Compatibility button (black arrow). It looks like a BOX that is BROKEN IN TWO PIECES. Clicking that button should resolve the issue. Once that button is clicked, it DOES NOT need to be clicked again unless the entire browser resets – however, it is recommend that the user check that the compatibility button is highlighted each time the user logs into the site.
**Issue:** “I accidentally assigned the wrong category to a document. How do I correct that?”

**Response:** The NAMI Affiliate Profile Center contact can very easily correct this issue. Direct the user to go through the upload process again (reference page 13), uploading the same document with the same name. When the user has browsed and selected the document to re-upload, be sure **NOT** to un-check the box beside “Add as a new version to existing files.” (black arrow)

Once OK is clicked, the system will re-direct as usual to the Check In step. At this step, the system will recognize that the document has already been uploaded and will automatically populate the category that was selected on the first upload attempt. Click the drop down menu by category, select the correct category and click Check In (green arrow). The system will then check in the document with the newly assigned category.
VII. Next Steps for the Trained NAMI Affiliate Profile Center Contacts

Once the NAMI Affiliate Profile Center Contacts have been trained, they will receive the login credentials from the NAMI Profile Center Manager. The best test of the training is to access the NAMI Profile Center and start uploading information and documentation. Even if the contacts are not immediately ready to move forward, it is a good idea to look at this list of documentation required of all NAMI Affiliates no matter which model of Re-Affiliation will be supported by their specific NAMI State Organization.

Required Documentation

All NAMI Affiliates must submit the following information regardless of which Re-Affiliation model your NAMI State Organization chooses to pursue. This is a great place to direct newly trained NAMI Affiliate contacts to get their respective NAMI Affiliates to focus energy on completing.

- Shared Metrics:
  - Staff Directory & Contact Information
  - Programs - NAMI Signature Programs
  - Programs - other non-Signature programs - materials, promotion

- Shared Document Categories:
  - Logo
  - Membership - application – print & electronic
  - Membership - Mailing opt-out
  - NAMI Affiliate Mission Statement

As your NAMI State Organization determines which models of Re-Affiliation they will be supporting, there will be additional required documentation. NAMI Affiliates in your state will be given the documentation list they should be pursuing.

For more information on the Required Documentation for Re-Affiliation, go to www.nami.org/standards.
VIII. Conclusion

The NAMI State Organization Profile Center contact will provide to the NAMI Affiliate Profile Center Contact the following information:

- The NAMI State Organization Profile Center contact’s email address and phone number for questions, issues and comments about the NAMI Profile Center
- The NAMI Profile Center Tips & Troubleshooting sheet (and subsequent updates as they are provided by the NAMI Profile Center Manager)
- Any revisions to the NAMI Affiliate Profile Center Contacts Manual

Hopefully, this information will assist the NAMI State Organization and NAMI Affiliate leadership in developing the best strategy for the documentation process as they move forward with Re-Affiliation.

Questions

The NAMI Center for Excellence wants the NAMI Profile Center to be a very useful tool for all NAMI State Organizations and NAMI Affiliates. You are encouraged to use the NAMI Profile Center as soon as you can to get comfortable and familiar with the site. Please share with your NAMI State Organization Profile Center contact any feedback you have on how the system functions for you, issues you experience as begin working with the site, and suggestions that might make the site more useful and user-friendly. The NAMI State Organization Profile Center contact will work with NAMI to speak to any concerns or issues you have.