HPOG Community:

Social Media Tools User Guide

Version 3 – November 29, 2012

Contents

Follow each step to support your path to success with Social Media Tools!

1. Logging In

Follow these steps to login to the Social Media Tools site:

1. If you have not done so already, go the HPOG Community Website's homepage and click on the arrow entitled "Register for Social Media" to submit your request to register. Soon thereafter, you will receive you Username and Password.

2. Go to the Social Media Tools site by either going to the HPOG Community Website's homepage and clicking on the arrow entitled "Login to Social Media," or go up to the upper right-hand side of the homepage and click on the "Login" button.

3. Enter your Username and Password.

4. Contact HPOGsupport@pep8a.com if you require any further assistance with logging in.

2. Navigation

Use the ribbon and links at the top of page to navigate to the main areas of the site:

1. *My Site/My Newsfeed*
2. *My Content*
3. *My Profile*
4. *Lookout*
5. *Return to HPOG Community*
6. *Global Campaigns*
7. *Find People*
8. *'?' (Help Menu)*
9. *User Menu Options*

3. Getting Started

Next, go to *My Site/My Newsfeed* and use the *Getting Started* feature. This tutorial will walk you through the steps to set up your user profile and show you how to use basic features such as posting comments, adding Colleagues, and more.

It is strongly recommended that you work through each step in the tutorial, one by one, before you begin exploring other features of the Social Media Tools site.

Helpful Tip #1: Click on the link for step 1: *Add Profile Picture*, to activate the step.

Helpful Tip #2 : Have a profile picture of yourself saved to your computer for easy access to complete step 1: *Add Profile Picture.*

4. Manage My Profile

My Site My Newsfeed My Content My Profile Return to HPOG Community | Global Campaigns | Find People

View My Profile as seen by: Everyone

6:36 AM

What's happening?

Jaime Ramirez

California

Past projects : Federal Government Partner Projects

Skills : Federal Government Partner Projects

Schools : Organization Effectiveness

Interests : business process improvement

Affiliation Type : Affiliated with HPOG Program Office

Name of Organization : Performance Excellence Partners

Role at Organization : Contractor Partner

Type of Organization : Other (please specify)

Other Type of Organization : Contractor Partner

^ Hide information

Edit My Profile

Jaime Ramirez is an HPOG contractor partner with Performance Excellence Partners and excited to assist the program with social media!

Libraries Overview Organization Content Tags and Notes Colleagues Memberships

Now that you have completed the *Getting Started* tutorial and have set up your user profile, you can view and manage your profile information by navigating to *My Profile*.

Use the *Edit My Profile* link to make updates and changes to your profile information (explained on the next page of this guide).

Helpful Tip #1: Click on the *Show More/Hide Information* link to view a summary of your profile.

Use these tabs to view and manage different information associated with your profile.

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4. Edit My Profile

My Site   My Newsfeed   My Profile   Return to HPOG Community | Global Campaigns | Find People 🔍   ❓ hpog\jramirez ▾

Browse

💾 Save and Close | Cancel and Go Back

* Indicates a required field
⚠️ Indicates a field that is updated automatically from the corporate directory. Changes to these properties may be lost.

Basic Information   Show To

Account name:	hpog\jramirez	Everyone
Name:	hpog\jramirez	Everyone
About me:	Jaime Ramirez is an HPOG contractor partner with Performance Excellence Partners and excited to assit the HPOG community with social media!	Everyone
	Provide a personal description expressing what you would like others to know about you.	
Picture:	Choose Picture Remove	Everyone
	Upload a picture to help others easily recognize you at meetings and events.	

Go to *My Profile > Edit My Profile*. View/edit each of the text fields and feature options to modify your profile accordingly.

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5. Connecting With Colleagues

My Site   My Newsfeed   My Content   My Profile   Return to HPOG Community | Global Campaigns   Find People 🔍

California

🖼 Edit My Profile   ∨ More information

Libraries   Overview   Organization   Content   Tags and Notes   Colleagues   Memberships

👥Add Colleagues   👥Edit Colleagues | 👥Remove Colleagues

☐ Name ↑   Show To   My Team

Add Colleagues   No

Colleagues
Identify the people you know or work with as
colleagues.   No

                                                              👥✓ 📖

☐ 🖼 Blair Corcoran   Everyone   No

☐ 🖼 Brian Holland   No

Go to *My Profile > Colleagues* tab. Here you can add colleagues to your list and view colleague profiles.

To do this, use the *Add Colleagues* feature and work through the steps.

Helpful Tip #1: In the Add Colleagues window, click the *address book icon button* to search for colleague names.

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6. Sharing Information

Add a Post

Ask a Question

Private Message

There are multiple ways to share information with colleagues through *My Newsfeed Activity Stream*, including *Add Post*, *Ask a Question*, *Private Message*, and more.

My Site | My Newsfeed | My Profile | Return to HPOG Community | Global Campaigns | Find People

Activity Stream

Add Post | Ask a Question | Private Message

What are you working on?

1876 characters remaining

Post

Edit Subscriptions | Edit News Interests | ...

Getting Started

8 > 9 > **10 | Add a Collea...**
Add a Colleague

Communitie...

View All Com...

Helpful Tip #1: Use the *newsfeed filter button* to select different ways to view newsfeed information.

My Newsfeed | Show: My Newsfeed

hpog\jramirez: Now following community Employ...
Engagement.

23 minutes ago ‣ Like ‣ Comment ‣ Follow-up ‣ More

The Idea Campaign Project Director Conference T...
ideas posted in the last 24 hours.

about 14 hours ago ‣ Follow-up ‣ More

💡 IDEA

hpog\jramirez: Submitted an Idea in @[Project ...
Ideas: Test 2]: Conference Topic Idea: How to Ke...

a day ago ‣ Follow-up ‣ More

hpog\jramirez: Sounds good :)
a day ago Like

Blair Corcoran: @mhayes thanks for working on this right away!!

a day ago ‣ Like ‣ Comment ‣ Follow-up ‣ More

Edit Subscriptions | Edit News Interests | Edit Setting...

Go

√ My Newsfeed
My Activities
Top News
All Public Microblogs
Private Messages
Follow-up
Questions
Polls
My News Interests
Ideas
Earned Badges
Kudos
Videos
My Encoded Videos
Colleagues
    Blair Corcoran
    Brian Holland
    Brian Jones

Helpful Tip #2: Click *My Newsfeed* to view your activity and your Colleagues' activity. Only the activity of Colleagues you have added to your list (in *My Profile > Colleagues*) will show up here.

Helpful Tip #3: Click *All Public Microblogs* to view all activity on the site, even if people are not on your Colleagues list– this can also assist you in identifying Colleagues you may want to add to your list.

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6. Sharing Information (cont)

You are encouraged to submit relevant posts to the public newsfeed area to get conversations started, share ideas and best practices, and more! Participation in newsfeed dialogue helps the HPOG Community stay connected and supports information sharing.

To post, simply click in the text box, type in your message, and click the "Post" button.

7. Submitting Ideas

Go to *Global Campaigns*, select a campaign, enter ideas, vote on ideas, and view voting results to collaborate with others on various ideas, such as conference topics.

My Site   My Newsfeed   My Content   My Profile   Return to HPOG Community | Global Campaigns

Campaign Center

View All Campaigns

All Ca

Show: [All ▾]   [🔍]

MOST

Total Votes : 0

Project
Track I

Case Manager Track: Annual Meeting

HPOG Ideas

Job Developer Track: Annual Meeting

Project Director Track Ideas: Annual Meeting

Welcome to the Idea Campaign!

Use this idea campaign to collaborate on ideas for the next big thing!

Submit an Idea

Show: [Newest Ideas ▾]   🔍 ↻

Conference Topic Idea: How to Keep My Team Engaged!   TOTAL VOTES: 2
                                                                   Your votes: 0 ➕

Submitted by hpog\jramirez 3 days ago

Suggestions for keeping my team engaged with programs using team and communication techniques, as well as collaboration tools.

Comment // View Comments (1) // View Details

Got better conference food   TOTAL VOTES: 2

Helpful Tip #1: You will receive separate communications providing instructions and timelines for voting on Annual Meeting campaigns.

8. Joining Communities

to HPOG Community | Global Campaigns | Find People 🔍

Getting Started

1 | Add Profile Picture ➤

Add Profile Picture

Go to *My Site > Communities*. The easiest way to join Communities is to click *View All Communities*, then click *Follow* for each community you want to participate in.

Communities

View All Communities ⬅

My Communities

Go to my communities

Recommended Communities

There are no recommendations

Find Communities

📨 🔍 💬 0 🔄

out the HPOG Webinar:
ber 3rd. Getting excited, nothing
ome of the great work everyone
here...THE STUDENTS!!

e

one of our very own grantees
stories to share their program.

Community List ⬚ ✕

Items Per Page:
10 🔄 Reset

A **C** **E** **J** P **R** **S**

👥 Assessment, Academic Advising and Academic Support — ○ **Follow**

👥 Case Manager Community — ○ **Stop Following**

👥 Education and Training — ○ **Stop Following**

👥 Employment and Employer Engagement — ○ **Stop Following**

👥 Evaluation — ○ **Stop Following**

👥 Job Developer Community — ○ **Stop Following**

👥 Program Director Community — ○ **Stop Following**

👥 Recruitment — ○ **Stop Following**

👥 Support Services — ○ **Stop Following**

Helpful Tip #1: It is recommended that you join all available Communities initially. By following the dialogue and content of each Community you will get a better understanding of which Communities you want to focus on.

Helpful Tip #2: Several of the Communities are designed to support Program Map component, such as *Support Services,* where you can learn how other grantees are delivering services, pose questions, and more.

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8. Joining Communities (cont)

Once you have joined Communities at *My Site*>*Communities*>*View All Communities*, then you can use the *Go to my communities* feature to access each one by selecting the community name, then click the *Go* button.

Go to My Communities

8. Participating in Communities

To participate in a community, view *Community Members*, *Add Posts* and *Ask Questions* to share information relevant to members and the designated focus for the community.

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9. Lookout – Personal Dashboard

Lookout is a new customizable interface with dashboard-like features that make it easier for you to personalize how you stay connected and participate in the site. The best way to get acquainted with Lookout is to use the *tour* feature, which will walk you through set up and key features.

Helpful Tip #1: Use these buttons to move windows left and right across you screen.

9. Lookout – Personal Dashboard (cont)

Lookout offers several key features to help you personalize the information you see, including:
- *Tiles* for different categories of information
- *Columns* with various content from news streams, people, subjects, communities and more
- The ability to *Post* and go directly to *Communities*

10.Finding Community Expertise

In *My Site/My Newsfeed,* go to the *Expertise Search* area. Using the Expertise Search feature, you can find colleagues in the community that have various areas of expertise. You can search by Tag (key term) or by Person. In the example below, we entered the tag "program requirements" and three names were returned in the search.

Helpful Tip #1: Click on the name of a colleague in this window to go directly to their Profile.

Next, check the box next to each name and click the *compare* button to view the expertise for each person side by side in a separate window. You will see the expertise of "program requirements" and more in the search results for each person.

10. Finding Community Expertise (cont)

In *My Site/My Newsfeed*, scroll to the very bottom of the page to the *Spotlight Expertise Browser* area. In this area you will see the 50 highest scoring tags (key terms) in the community, organized in alphabetical order, and sized with a larger font size for higher scores and smaller font size for lower scores. Click on the tag you are interested in.

In this example we clicked on the tag "marketing and outreach". The results display within a separate window with an array of multiple community members that have that expertise. When you place your mouse cursor over a person's name, a mini profile card pops up and provides a snapshot of information about the person. You can click on links within the mini profile card to access a person's profile, ask them a question and more.

10. Finding Community Expertise (cont)

Updating areas of expertise in your profile. The Expertise Search feature uses information from your profile as areas of expertise. Go to *My Profile > Edit My Profile* to update your profile areas of expertise using the following fields: *Ask Me About*, *Skills* and *Interests*. See the example below.

Ask Me About:

OrganizationEffectiveness; Training; TechnicalAssistance;

Update your "Ask Me About" with topics you can help people with, such as your responsibilities or areas of expertise.

Skills:

TechnicalAssistance; OrganizationEffectiveness; Training;

Include skills used to perform your job or previous projects.
(e.g. C++, Public Speaking, Design)

Interests:

TechnicalAssistance;

Share personal and business related interests. We will help you keep in touch with activities related to these interests through events in your newsfeed.

Sample List of Key Terms for Expertise:

- AdultEducation
- CareerPathways
- CaseManagement
- JobDevelopment
- ProgramEvaluation
- PublicSpeaking
- TechnicalAssistance
- Training

Helpful Tip #1: Use standard industry terms that apply to your areas of expertise, such as #ProgramEvaluation, with no spaces in between words– this creates consistency in terms and phrases that are tagged within the system, making it easier for members to find areas of expertise. See the "Sample List of of Key Terms for Expertise" as a reference.

10. Finding Community Expertise (cont)

The Expertise Search feature also uses information from from Activity Stream posts that are tagged and captured as areas of expertise for a search. When posting in your Activity Stream or within a community, use a **hash tag (#)** and type key terms with no spaces in between words. This will ensure areas of expertise from posts are properly captured in a search for expertise. See the example below "#professionaldevelopment".
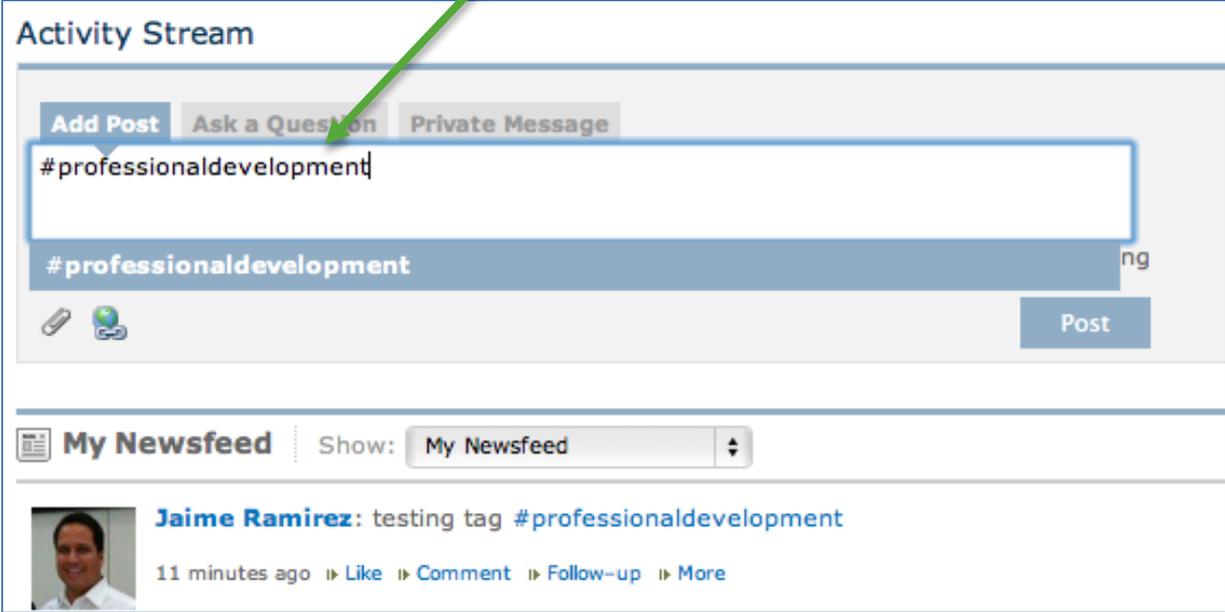
Activity Stream

Add Post   Ask a Question   Private Message

#professionaldevelopment

#professionaldevelopment   ng

🔗   Post

📰 **My Newsfeed**   Show: My Newsfeed   ▲▼

Jaime Ramirez: testing tag #professionaldevelopment

11 minutes ago   ▶ Like   ▶ Comment   ▶ Follow-up   ▶ More

11. Receiving/Awarding Badges and Recognition

In *My Profile* you can view several recognition features about yourself and others, including:

- *Earned Badges* tells you the badges that you have earned so far
- *Available Badges* tells you the badges that you are on your way to earning
- *Earned Kudos Badges* tells you the badges that another colleague may have awarded you
- *Leader Board* tells you the names of colleagues who are in the lead with earning certain badges, with highest scores starting at the top
- *Available Badges* and *Leader Board* can also be viewed at *My Site/My Newsfeed*
- Note: all of the badges and scoring (except for Kudos Badges) are automatically generated by the system and are meant to be an encouragement to community members to participate and stay active on the site- this facilitates information sharing in the community!

Earned Badges

Collaborator - For following a large number of communities

Available Badges

Connector - For having declared a large number of users as your colleague.

Well Followed - For having been declared a colleague by a large number of users.

Earned Kudos Badges

John Doe has given you kudos:
Job Well Done

Leader Board

Badge: Connector

For having declared a large number of users as your colleague.

Leaders

Stacia Thompson (Score: 57)

Tressa Dorsey (Score: 50)

Kim Stupica-Dobbs (Score: 25)

Linda Metchikoff-Hooker (Score: 17)

Brian Holland (Score: 9)

Brian Jones (Score: 9)

Denise Donnahoo (Score: 9)

Marilyn Silver (Score: 9)

Ryan Morelaan (Score: 9)

11. Receiving/Awarding Badges and Recognition (cont)

Go to a colleague's *Profile, Overview* section, *Kudos* area and you can use the **Kudos** feature to award kudos badges to that colleague. Kudos can be given for any reason, but it is recommended that you recognize colleagues for their contribution to the HPOG Community in some way. In the example below, we selected the star badge and recognized them for a significant contribution to the community. This colleague will soon see the badge arrive in their activity stream and in their profile Earned Kudos Badges area.

Kudos

Give Kudos to Linda Metchikoff-Hooker

Choose an icon to display with your kudos:

What would you like to say to the recipient? You should not enter information you wish to keep private.

Thank you for your significant contributions and information-sharing on the Social Media Tools site! Very helpful!

1786 characters remaining

Give Kudos

Earned Kudos Badges

Jaime Ramirez has given you kudos:
Thank you for your significant contributions and information-sharing on the Social Media Tools site! Very helpful!

Helpful Tip #1: Select from multiple badge icons and type in the text message you want included in the award.

12. Installing and Using the PC Desktop Application

You can install and use the PC Desktop Application to quickly access core site features from the desktop of your computer to help you get connected quickly and facilitate ongoing participation on the Social Media Tools site. The tool includes many of the features from your activity stream, including newsfeeds, posts, questions, and private message features.

1) You must have Windows operating system 7, Vista, XP, or 8 installed on your PC (note: this application is not available for Mac computers at this time).

2) Download and install the Desktop Application program file NewsGator Social Sites 2010 Desktop v3.0 (click link here); the file is also located in the HPOG User Support Community.

3) Once you have downloaded the file, click to open the "Setup" file. Follow the instructions and on-screen prompts to install the application, including downloading/installation of Microsoft .Net Framework 4 if you do not have this installed already.

4) Launch the Social Sites 2010 application using the program icon now on your desktop or from your windows application menu. In the launch window do the following:
   • Uncheck "Use system credentials"
   • Enter http://hpogcommunity.acf.hhs.gov in "Social Sites Server Address"
   • Enter hpog for "Domain"
   • Enter your Social Media Tools username in "Login"; example "JDoe" (note: do not include HPOG\)
   • Enter your Social Media Tools password in "Password"
   • Click "Connect"

5) For more information on installing and using the Desktop Application, download and review the Desktop Application User Guide located at the Social Media Tools Site in the HPOG User Support Community.

13. Attach a File and Share Link

You can now attach a file in *My Newsfeed* or in a Community news stream and share the link in a post. This is a great way to share information with other colleagues! Simply click on the *paperclip icon*, click *choose file* to find the document you want to share, then click *Post*. The file name and link will now appear in your newsfeed post for others to access.

My Site My Newsfeed My Content My Profile Lookout **Return to HPOG Community** | Global Campaigns | *Find People*

Activity Stream

Add Post Ask a Question Private Message

What are you working on?

1873 characters remaining

Attach File ✕

Choose File no file selected

Use this control to attach an item in My Newsfeed. The item will be automatically saved in your Shared Documents or Shared Pictures, and is therefore available for all other people to discover and see.

Post

Edit Subscriptions | Edit News Interests | Edit Settings

My Newsfeed Show: My Newsfeed ⬍

Jaime Ramirez: Uploaded file HPOG Social Media – shared document sample_2012-10-24_20-42-57.docx in hpog\jramirez Shared Documents: Testing attach file feature

less than a minute ago ⮞ Like ⮞ Comment ⮞ Follow-up ⮞ More

14. Installing and Using the Mobile Application

If you have an iPhone or iPad, you can install and use the Mobile Application (called Social Sites 2010 by Newsgator Technologies) to access the HPOG Community Social Media Tools site. The Mobile Application is an excellent way to use core site features on your iPhone/iPad to stay connected and participate on the go. Please review the following requirements and steps below to get started.

1) You must have an iPhone or iPad with iOS version 4.3 or higher.

2) Using your iPhone or iPad, go to the iTunes store and download/install the Social Sites 2010 application.

3) In the Mobile Application under Options > Server Settings, enter the following information:

   • Username: enter your username for HPOG Social Media Tools; example "JDoe" (note: do not include HPOG\)

   • Password: enter your password for HPOG Social Media Tools

   • Domain: enter "hpog"

   • Server: enter "hpogcommunity.acf.hhs.gov"

   • SSL: leave "off"

   • Then click "Connect"

4) You can now begin using the Mobile Application. For more information, download and review the iPhone/iPad User Guide; the file is also located in the HPOG User Support Community.

15. User Support

If you require assistance with the Social Media Tools site, please contact HPOGsupport@pep8a.com for support.

Stay tuned for communications and updates to this user guide as additional social media features are made available.

Thank You!