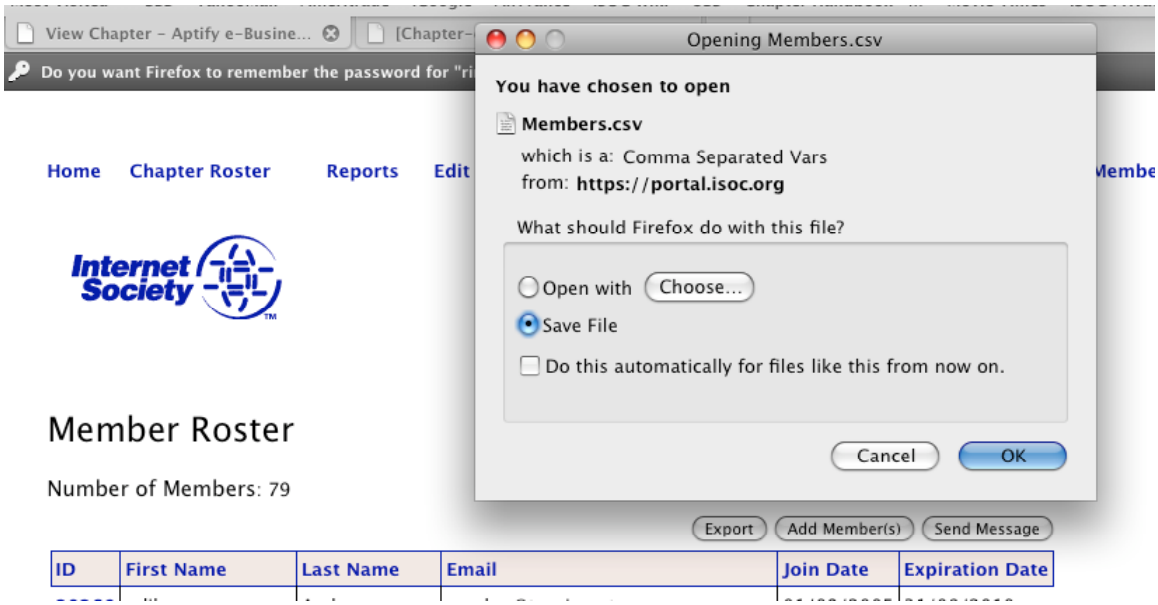
Instructions for synchronizing your chapter's data with the ISOC AMS

Please follow the instructions below step-by-step to ensure your chapter's data is correctly synched to our "master" association management system (AMS).

Uploads into AMS can be made at any time. Any new members you recruit will also be included in the member count in the AMS. However, data should only be synchronised with ISOC using the following procedure:

Obtaining your "master" data synchronization file:

1) A chapter officer must first log into the AMS Chapter Portal at https://portal.isoc.org/EBusiness/Home.aspx. If this is your first time logging in, please follow the procedure listed in the Chapter Officer Go-Live Guide, which you received on November 23rd, 2009.
2) After logging into the portal, click the **Chapter Management** menu. This will take you to the Chapter Roster, which will show you the current members for your chapter (currently in the AMS). Please do not be surprised if this data is old or inaccurate.
3) Clicking the **Export** button (as shown below) will provide a .csv file containing all the members of your Chapter currently on record. Save this file to a local computer.



4) This .csv file is now the "master" file to be updated by your chapter and returned to ISOC. **Please ONLY use this file for updates and additions from your local data sources.** Other file types and schemas will not be accepted. However, please rename this local copy of the file, appending your Chapter name to the filename (for easier identification).
5) Please do not change the schema of this file in any way – i.e., do not rename columns, or remove columns. You may save this file as an .xls format file (Excel) if this makes it easier for you to work with – however, please do not make any other alterations to the file structure.
6) Make any changes required to that ISOC[Chapter-name].csv file – either correcting information on members included in that file, or adding members from your local Chapter system.
7) If you are adding new members, just leave the Member ID field blank. If you are updating existing members, please do NOT change the Member ID! This is the primary "matching" field we use for updates to existing member records.
8) Once finished, please notify ISOC at ams-project@isoc.org that you are ready to upload your file. At this point, we will send you the URL, username, and password for your chapter's secure Webdav folder.
9) When you have that information, use the provided URL and username/password combination to upload the modified file to ISOC. However, to do this, you will first need to map a drive to your chapter's Webdav folder. Those instructions are detailed in the next section.
10) Finally, please notify us again when your chapter's data file has been uploaded. We will review the file, and be in contact with any questions or when the data has been imported to the AMS.

Uploading your chapter's updated file to ISOC

To assist in the chapter-data upload process, ISOC has provided one secure, password-protected folder for each chapter. Once you have exported your Chapter Roster to the .csv file and made modifications, please upload that file using the instructions below.

NOTE: Please send a request to ams-project@isoc.org if you do not yet have the username/password combination for your secure Webdav folder!

Connecting to your chapter's secure Webdav folder using a PC running Windows XP:

1. Open **'My Network Places'**
2. Under ' Network Tasks' click **'Add a network place'**
3. The 'Add Network Place' wizard is displayed. Click 'Next'
4. Highlight the option **'Choose another network location.** Specify the address of a web site, a network location, or a FTP site' and click 'Next'
5. Enter your WebDAV URL in the 'Internet or network address' box. Click 'Next'
6. Enter your username and password when prompted. Make sure the 'Remember my password' option is checked. Click 'OK'.
7. Enter **'ISOC WebDAV'** when prompted to enter a name for this network place. Click 'Next'
8. Check the box marked **'Open this network place when I finish'** and click 'Finish'
9. You may be prompted to enter your username and password again at this point
10. The WebDAV directory is now displayed and you can drag and drop files to/from other directories on your machine

Note: The above steps will only work for **Windows XP**.

Connecting to a Webdav folder for machines running Vista

For Vista you may need to apply patches found here:
http://support.microsoft.com/kb/928692/en-us and
http://support.microsoft.com/kb/907306/en-us and
http://support.microsoft.com/kb/892211/en-us

After applying the Vista patches:

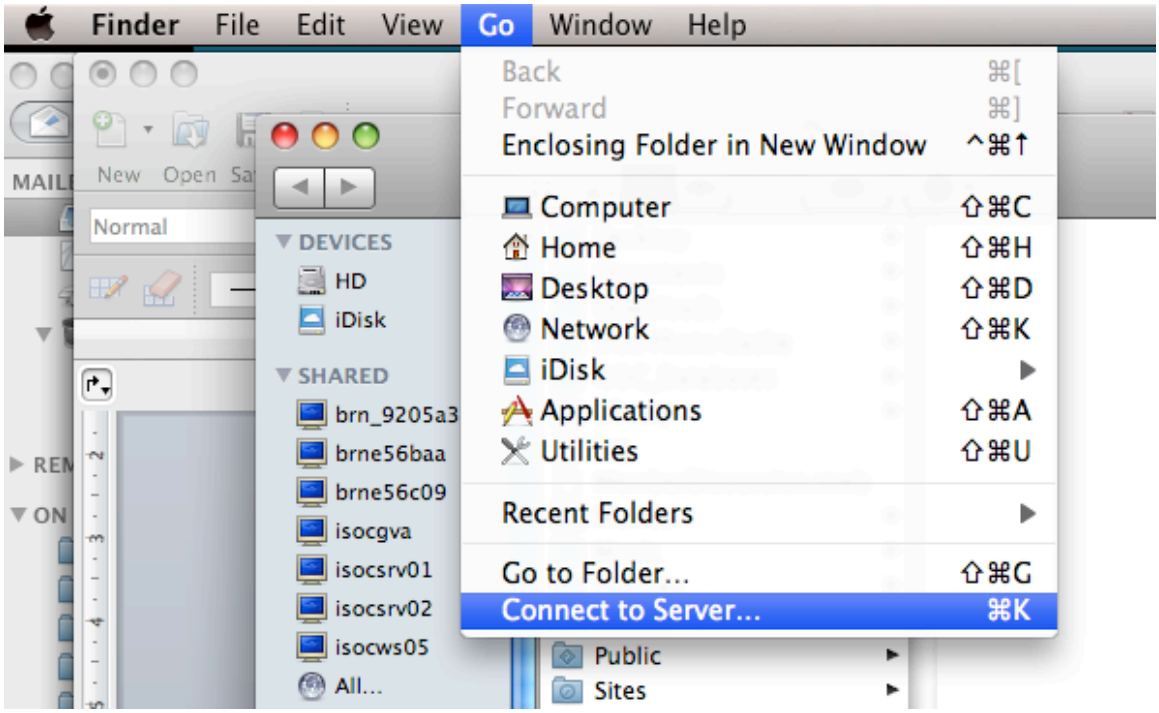
1. From the Start menu, right-click **Computer** and select **Map Network Drive**. (hidden behind the >> symbol).
2. In the Map Network Drive window, click **Connect to a Web site** that you can use to store your documents and pictures, and then click Next.
3. Click "**Choose a custom network location**", and then click Next.
4. In the "**Internet or network address**" field, enter your WebDAV URL (you will need to get this from ISOC as it specific to your chapter)
5. When prompted, enter your username (chapter ID) and your password
6. Make sure the 'Remember my password' option is checked. Click 'OK'.
7. Check the box marked 'Open this network place when I finish' and click 'Finish'
8. The WebDAV directory is now displayed and you can drag and drop files to/from other directories on your machine

Let us know if you do not have access to a Windows XP or Vista machine, or if you have a Linux box, as we may be able to devise another upload alternative.

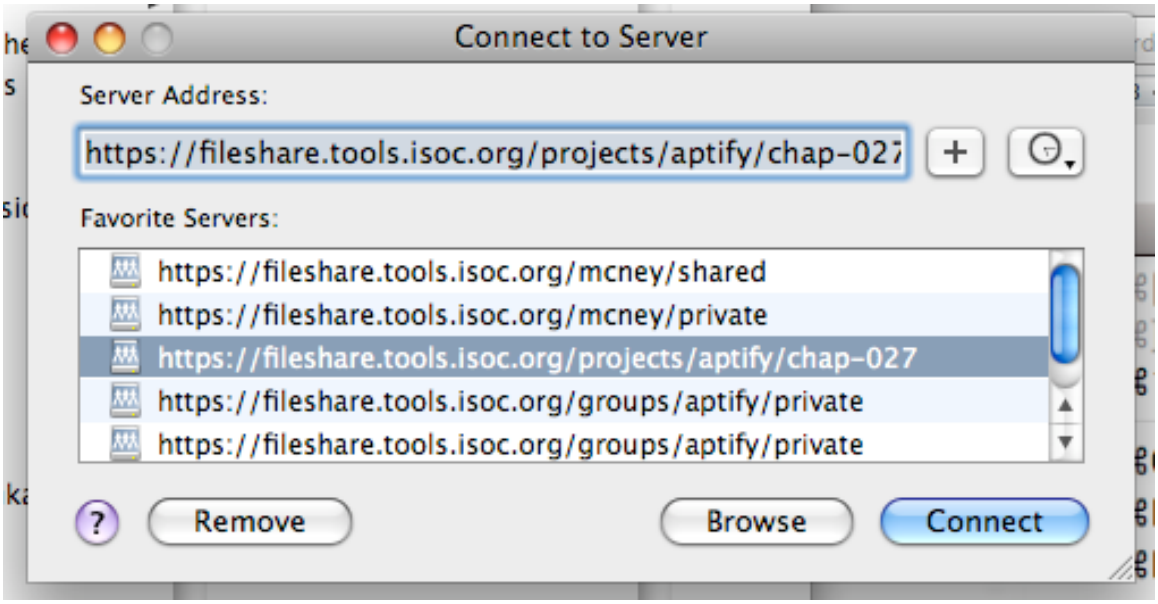
Connecting to Webdav using a Mac:

This procedure is a bit simpler than the one above:

1. Launch a Finder window and click **Go → Connect to Server**



You will see a dialog box like the one displayed below:



2. Enter your chapter's URL in the Server Address field above, and click the "**+ button**" to the right of that field.
3. That will initiate the connection, and you then need to enter your chapter username & password.
4. You can now drag and drop the .csv file into this folder.
5. After the first connection, your folder will be "stored" in the Favorite Server area so it will be easier to access next time.