



## Navigating the EPCOR Knowledge Community

To access the EPCOR Knowledge Community, you must first log in. The same username and password you use to access the members-only content on our website will allow you to access the Knowledge Community. Simply click on the Knowledge Community tab in the navigation bar on [epcor.org](http://epcor.org) to launch the site. You can also access the site via the web address: [community.epcor.org](http://community.epcor.org). If you don't know your username and/or password, click the "sign in" link, then select the appropriate forgot my username/password option as needed.

### GETTING STARTED

All EPCOR members have been pre-populated into the Community with a basic profile. However, your profile must first be activated.

When logging in to the Community, you will be prompted to agree to the site's Code of Conduct. Scroll to the bottom of the page and click "I agree." Next, you will need to activate your profile and customize your privacy and subscription settings.

The following steps will assist you in activating your profile. You can also click on the "Tutorials/FAQs" tab in the navigation bar for additional guidance and informational videos.

### ACTIVATING YOUR PROFILE—PART ONE

Log in and click on the drop-down arrow next to the profile photo icon in the upper right-hand corner of the homepage, then select "profile." From your profile page, select "privacy settings" under "my account." The settings you select in this section will control the information you share about yourself, as well as when, how and with whom you will communicate.

You'll need to decide the following:

#### Q: I would like to be included in the member directory and community rosters:

Answer **Yes** to be included. Clicking **No** will hide your profile from others in the Community. We recommend selecting yes so that other EPCOR members can search for you within the Knowledge Community. Your contact information will only be accessible to EPCOR members.

#### Q: Preferences for Picture, My Networks, Company Info, Job Title & Department, Address, City, State, Zip, Website URL, Phone Numbers, Email Address, etc.

Set your personal preferences for who will see each of these items. Your options are:

**My Contacts**—allows members and staff whom you have invited or accepted as your contact to see your personal information. Adding someone as a contact is similar to adding them as a friend on a social media website. This allows you to connect, collaborate and stay in touch.

**Members Only**—allows all members of the Community to see your information. Members of the Community are other EPCOR members and staff.

**Public**—since the Knowledge Community is a private site, setting your preferences to public is the same as setting them to members only.

**Only Me**—prohibits anyone from seeing your information.

At a minimum, we suggest setting your preferences to **Members Only** for your Picture, My Networks, Company Information, Job Title and Description, City, State, Zip, Contact Me Options, Digital Ribbon and Honors and Awards.



### Q: Why should I customize/add details to my profile?

Adding content and updating your profile presents several key benefits:

**Accuracy**—Completing your basic contact information, such as job title, email, phone, address, etc. ensures that EPCOR has the most current and accurate information on file when sending out important communications and member benefits.

**Visibility**—The more you customize your profile with details such as Education, Bio, Honors and Awards, Job History, Social Media links, etc., the easier it will be to connect with others with similar backgrounds. And, don't forget to upload your picture! Sometimes it's easier to remember a face than a name.

### Q: What do My Connections mean?

**Contacts**—shows the members you are connected to within the Knowledge Community.

**Networks**—populated based on information you add to your Profile, such as City and Job History.

**Communities**—shows the Knowledge Communities and Committees in which you are participating. All EPCOR Members are auto-enrolled in the All-Member Community.

**Please remember to SAVE your settings, and don't forget you may change your privacy settings at any time.**

### Q: What do My Contributions mean?

**Summary**—provides an overall picture of your contributions to the Knowledge Community.

**Achievements**—indicates your activity in the Knowledge Community. EPCOR acknowledges most active members on the Knowledge Community home page. Most active members also receive a badge on their profile.

**List of Contributions**—provides a comprehensive list of content you have posted.

## ACTIVATING YOUR PROFILE—PART TWO

After saving your privacy settings, you now need to set your email preferences and Community notifications. The settings you create will control when, and in what format, you will be notified of discussions taking place within your Communities and Committees.

### Q: What do I choose for Email Preferences?

Under My Account, select Email Preferences. You will see a list of the Communities and Committees in which you are participating. Contact request email notifications and Community invitation notification emails will be sent from [noreply@notifications.epcor.org](mailto:noreply@notifications.epcor.org).

The types of emails you may receive from the Knowledge Community include:

**System Emails**—Emails required to confirm user participation. Users cannot opt-out of these emails.

**Community Emails**—Emails typically sent from Community admins or the Community Manager via automation. By default, you receive Community emails from all your Communities unless you explicitly opt-out.

**Participation Emails**—Emails reflecting one-on-one interactions (ex: messages, contact requests from other members, @ mentions from other members, real-time notifications).

**Promotional Emails**—Emails that promote upcoming events, publications, etc.

Selecting “yes” will opt you in to receiving the email communications above, while selecting “no” will opt you out. If you decide to receive these emails, you can also decide how often you wish to receive them in our next step.



### Q: What do I choose for Community Notifications?

Under “My Account,” select “Community Notifications.” You will see a list of the communities and committees in which you are participating. For each of these, make a selection:

**Real Time**—you will be notified via email each time there is a posting added to one of your communities/committees. These emails will be in HTML format.

**Daily Digest**—you will receive one email per day alerting you to the postings for each of your communities/committees. These emails will be in HTML format.

**Plain Text**—you will receive real-time emails in plain text format.

**No Emails**—if you choose this setting you will not receive email notifications from the Knowledge Community. You will have to visit the Knowledge Community and check your mailbox to find messages and notifications of postings.

### Q: What do I choose for Discussion Signature?

Anonymous posts in the Knowledge Community are prohibited. However, you control how your signature appears. The settings you create will control what information other members see each time you contribute to the Knowledge Community. You can edit your signature by visiting your profile, then clicking “Discussion Signature” under “My Account.” The default setting includes Name, Designation, Job title, Company name, City, State and Phone. We recommend that your Signature include: Name, Designation, Job Title, Company Name, City and State. You may add your phone number and email address if you choose.

## UTILIZING THE LIBRARIES:

Once you’ve completed your profile, select “All Member Community” from the “Communities” tab in the green navigation bar. Click on the “Library” tab to access the library contents. Each Community has its own associated library. Library content is organized in expandable folders by subject and holds valuable information, such as sample documents, research studies, statistics, whitepapers, updates and more. Click on the arrow next to the various folders to expand sub-folders. Click the folder names to see the documents within a folder.

### Q: How do I view and download a document?

To view a document, click the name of the document once. To download a document, double click. Depending on your browser settings, select the appropriate “save as” option to download the file to a local drive.

### Q: How do I upload a new document/resource to a community library?

Share your payments-related documents by selecting Communities, then choose the appropriate Community library to post the document. Navigate to the folder location in which you wish to upload the document. Under folder contents, select “New” and enter the document information, including Title, Description, Library, Folder and Entry Type, then click next. Browse for the file on your local drive by clicking “Browse,” then click “Upload File.” Once your file has uploaded and is displayed, click “Finish.” Your document should now appear in the respective library.

## JOINING THE CONVERSATION:

All conversations are housed within the Communities section of the Knowledge Community. Each Community within the site houses separate postings/discussions.

### Q: How do I reply to a discussion?

Within an existing discussion, on the right side of the comment is a list of options that allows you to respond accordingly. Choose “Reply to Discussion” to leave a comment.



### Q: How do I start a discussion?

From the “Discussions” tab in a Community, select “Post New Message” on the right-hand side to start a new discussion thread. You will be given the option to select in which Community to post the message and to cross-post in a separate Community. After creating your post and reviewing for errors click “Send.” Your post should then appear.

## BLOGGING

One of the great things about the Knowledge Community is that not only is it a place for members to connect and collaborate, but it serves as a place to share your knowledge, thoughts and opinions. One great way to share is by writing a blog. From the home page, you will see the section for EPCOR Blogs. You can click the “More” tab to see all blog entries written by staff and occasionally members in chronological order.

**Blogs are public, so they can be viewed by anyone and linked on external websites. All security procedures remain in place for all other areas of the Knowledge Community. They are the only public content and cannot be made private under your settings.** Blog posts are typically longer than a discussion post, and usually feature the author’s thoughts and opinions on a relevant topic.

To read a blog, simply click on the title and the full entry will appear.

### Writing a Blog

If you would like to write your own blog post, visit the main blogs page and click “Create a New Blog Post” in the top right. First, you’ll want to give your blog a title. A tip for getting others to read your post is to give it a fun or catchy title!

Next, you’ll be able to write your blog entry. You also have the option to include images, media, files or hyperlinks, tables and more. Once you’re finished writing, you have the option to associate your blog post with a particular community.

Finally, you’ll want to either publish your post immediately or schedule it to post at a later date or time. You can also save your blog as a draft and come back to it later.

We encourage you to post a blog if you have ideas to share!

## WHAT ARE THE FEATURES ON THE KNOWLEDGE COMMUNITY HOMEPAGE?

The Knowledge Community homepage is a dashboard highlighting the most recent activity as it relates to the communities in which you are involved. Everything from current discussions (*Latest Discussions*), to recent documents (*Recent Shared Files*), blog posts (*Recent Blogs*), EPCOR news (*Announcements*) and more are linked here. EPCOR learning events and important announcements are also linked on this page (*Upcoming Events*) to help keep members up to date on all upcoming learning opportunities.

We hope that you enjoy the EPCOR Knowledge Community and find it a valuable resource.

Should you have any questions or suggestions, please contact  
Madison Howard, Manager, Member Communications at [MadisonH@epcor.org](mailto:MadisonH@epcor.org).



Electronic Payments Core of Knowledge

EPCOR is your electronic payments core of knowledge and influence. We are a member-focused association devoted to providing personalized support and services.

The mission of EPCOR is to provide payments expertise through education, advice and member representation.

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