CSMFO Knowledge Base
User Guide

General Overview

CSMFO is modernizing the way members share information! The current CSMFO Listserv is being replaced with what we’re calling the Knowledge Base. The Knowledge Base is a place to capture survey’s and documents in an easily searchable space for members to access and find what they need. The Knowledge Base is essentially a collection of searchable online discussion boards and libraries. To access, go to https://members.csmfo.org/home.

Upon logging in, you see 3 columns (latest discussions, recent shared files (libraries), and upcoming events).

With the old Listserv, you received every message sent to the list and members were advised not to reply to all. That’s all changed with these discussion boards. By replying to all, messages are captured for posterity, help build the Knowledge Base and can be searched easily with the robust modernized search features.

Profile

Click on the dropdown arrow at the top right of the webpage to access your profile settings.

You can update your contact information, add a picture, and other details about you. You can also customize your email notifications settings using “Stated Interests” by adding from the 8 Standard Tags categories, such as “Revenues, Grants and Fees”, which can assist you in managing your email inbox.

You can also manage various settings under My Account.
Email Notifications

Since you’re now encouraged to reply to all, there is the possibility of receiving a lot of discussion-related emails. To keep your email inbox from being inundated with messages, members by default will receive a daily digest of messages.

You can, however, change your settings to receive all messages in real time.

Community Notifications: Under My Account, select Community Notifications.

You have three standard choices for your “Community Notifications”: Real Time, Daily Digest, and No Email.

When a member creates a discussion thread, he/she has the option to “tag” it with any of the preset topic categories such as “Revenues, Grants and Fees” or “Accounting and Financial Reporting”.

Topic Notifications: If you already have Stated Interests selected, the standard choices for notifications are No Email, Personalized Digest, and Personalized Digest & Real-Time Discussion Emails. The third option would allow you to receive messages of interest in real time, even if you receive all other messages in daily digest mode.
How to Post a Survey

1. Login https://members.csmfo.org
2. Click on “Post a message”
3. Complete the information requested

Formal Tags

CSMFO has created the following standard tag categories to be used for each survey (discussion) or library post by typing # and then begin typing the words below (no spaces) and they will appear for you to select. Please use one of these categories for each post:

- Accounting and Financial Reporting
- Budget
- Debt Management
- ERP and Digital Systems
- Purchasing
- Retirement and Benefits
- Revenue, Grants and Fees
- Treasury and Investments

Special Discussion Boards (Communities)

Aside from the open communities, some members may also belong to other discussion boards for CSMFO Board, committees, chapters, or other:

Open Communities (for everyone)
- Members
- Chapters (each one)

Hidden Communities
- Board & Committees
- Chapter Chairs
- Committees (each one)

The hidden communities are administered by the association.

Glossary of Terms (used by the Knowledge Base software: Higher Logic)

Communities – Communities are discussion boards that allow you to participate in discussions and share resources with other members.

Library – Collection of documents or links that were either attached do a discussion post or added directly to a Library.