FMYI is your intranet, to help your team keep everything organized, reduce stress and track what's important. A brilliant person on your team has created this site to empower you with what you need to succeed.

This video will go through the top 3 things you need to know about your FMYI site.

1. How to find what you need
2. How to add what's new
3. How to use reporting

So first, to find what you need, you need to access to the site.

I. Logging in - 0.50
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=50s

- **a.** Type in your username and password.
- **b.** Use Social Signin so you don't have to remember another password – FMYI will NEVER share your information on other social networks.
- **c.** Click "Forgot username/password" to retrieve or reset that information
- **d.** You will see a list of sites to which you have access, they are all separate from each other.

When you click on a site, you will be on the site's homepage.
Bookmark this as a favorite on your desktop and phone to quickly get back.

II. Home Page - 2.06
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=2m6s

- **a.** The top left navigation includes links to your shared calendar and tools such as reports.
- **b.** Below that are a list of categories that organize your workspaces. These can be customized by your site admin. Click the arrow to expand and view workspaces that are already created. Workspaces are core of your FMYI site. Each one is a home for all of the information, messages, files, links, forms, events and tasks about a particular resource, contact or project.

- c. Back on the homepage, In the middle is a dynamic dashboard for a high level view of your information. For example, these are "Projects by status" and the dropdown lets you select another, such as workspaces by size (click on Medium then back to homepage dashboard). Your site admin can customize these and add new ones for whatever your team needs to track.

d. Also on the Home Page are workspaces featured by your site Admin to highlight important resources and information. For example, the HR information center. Your site Admin can even feature links to external sites.
e. Scroll down on the home tab to Latest activity to see what's new on workspaces that you have access to view. If you have permission, you can even comment to help someone out.
f. And last but not least, the system has a powerful search to find what you need. It even reads the text inside of posted word and PDF documents. Type any word in the search box and click the magnifying glass or press enter. Here's a secret tip, just for you! If you don't know the ending of a word, add an asterisk… In this case I'm looking for a "fundraiser* ".

III. Workspace View – 4:27
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=2m6s

a. Let's take a look at the workspace. The center has a description and shows the current status. Below that is a "Post" box if you have permission to post.
b. The "Latest activity" feed shows a history of what's been added. Here you can see there are 9 posts. Notice a file contains a description so you know exactly what's included. And everything has a time and date stamp so there's no more guessing about who did what and when.
c. The right column shows the contact info, and clicking on workspace options expands to show who has access as well as other relevant information.

(SECTION TWO) Adding to your site: - 5:08
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=5m8s

Now that you can find what you are looking for, here's how you can contribute information.

IV. If there isn't yet a workspace for what you are working on, (click to expand projects), such as a new project, adding a workspace is so easy. It takes less than a minute, depending on the amount of info you want to include. Just click on the orange plus sign of the category where you want to add your new workspace. Type in the name (Annual report) and if you'd like, a brief description.
a. Check off relevant search labels or fill in your custom fields on the right. This is all customizable by your site Administrator.
b. Give other team members access so they can view the workspaces as well. On the left you select who's a member of the workspace, and on the right you decide if everyone else should have access or if it should be private.

Then, click Create workspace. Note: if you have contact info, you can click to create workspace and add contact info.

c. Add your contact's info like their address, phone number, and email address. Everything is optional.

V. Congratulations, you've just created your workspace! - 4.28
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=4m28s

a. Only people who have access to the workspace on you and a site admin will be able to view and interact here.
b. In Workspace options, you can view the Membership Info to change or remove team members' access to the workspace. Click "edit" and make them blank for no access, or read only or read & write. Anyone you select on the left will have access and show up when you are posting on the page. For everyone else, on the right you select their access or make private.

VI. Interacting on a workspace - 6:55
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=6m55s

a. You can update status dropdowns [Choose an option from the "Project Status" drop down] at the top and add a quick note in the "What's up" field. Whenever you change something up here, it adds a time/date stamped note in the latest activity below for your records.
b. The "Post" box provides many ways to capture information and communicate to your team. You can post a message and optionally alert team members to keep them in the loop about a phone call you just had, an email you just sent or an update of something that happened.
c. You can also post files like an Excel spreadsheet, Word document, PDF, or even a short video.
d. You can also add a task [Add a task "Review Report"]
e. Your site administrator may have added forms to the site for you to fill out. Simply click "Form" on the "Post" box and fill in the information it asks for. We will explore more of these when we cover reports in the site.
f. A site may even have tasks with reminders to fill out the forms. If your site has one of these, like a weekly update form, when you fill out the form you should notice that it checks off a task saying it is complete.
g. The last thing to show you is how to add to your calendar.

VII. Calendar – 8:45
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=8m45s

The calendar is actually a view of all the events and appointments across all the workspaces on your site. You can add on the workspace or in the calendar.

a. To add an event or appointment from a workspace, simply click on "Event" in the "Post" box and fill in the details. Check off an attendee so it's also added to their calendar and then select "Alert attendees" so they are notified. The "location" field is a section that is visible to other people on the site, even if the workspace is private, so you can type that you will be "downtown" so that they know where you are and can work with your schedule. Click on "Calendar" and then "My Calendar" to view the event.
b. You can also add events from the Calendar view by clicking "Add event" and filling in the same information. The only difference is that you need to connect it with a contact or project's page on the site. You'll notice that events are hyperlinked to the contact's workspace so you need to type that in and select it so the event has a "home." If you are trying to add an event on the go and have not yet added a workspace for it simply choose the option to "Add to a new workspace."
c. You can push events forward to another calendar like iCal, your iPhone, and even GoogleCal by clicking "send alert to attendees" and setting up your outside calendar to receive ics files.
d. To see another person on the team's schedule, click on the dropdown on the right to select their name. This will show if they have times they are "busy" and if they have filled out the "location" section on an event it will show this as well.
e. **If** you select "Main calendar", you will see the equivalent of a calendar that would be hanging up in the lobby of your office. These events are not necessarily attended by everyone, but can be viewed by everyone who has permission.

VIII. Reports – 12:17

https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=12m17s

a. We offer many different kinds of reports, depending on what type of information you're looking for. Click on "Tools" to the left and then "Reports" to see your options.
b. A **Site Report** is a straight-forward export of all the workspaces in the site and their basic information into an Excel spreadsheet. Simply click "Show/hide" and check off the types of workspaces before choosing whether you want custom fields and search labels included and selecting "Generate report." This doesn't include posted content but you will see things like Contact Info and Project Status which is great for prioritizing what needs to be done next.
c. An **Activity Report** will show all the activity on your workspaces. You can choose to includes everyone's or just yours.
d. A **Form Report** allows you to export your form entries in a spreadsheet format. Simply choose the form to include (if there is more than one on the site), filter by date, and choose a category (make sure you choose the

correct **single** one). You can include custom fields and search labels and then “Generate report.”

So now you know how to use your FMYI site! Now get personal by adding a picture and utilizing your settings.

Profile: - 13:22
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=13m22s

You can add a picture to your profile so when you post, you photo shows up and makes the site easier to skim for your teammates. At the top, where it says welcome and your name, just click your name. Then, click the image to add your photo. You can also put your contact info in.

13:53
https://fmyi.wistia.com/medias/jfrdq10pdz?wtime=13m53s

How to change site settings, change name, email, email notifications