GrowthZone – Info Hub Pt. 3: Launch and User Management

GrowthZone
smarter association software

Info Hub Launch/User Management Agenda

Pre-Launch Best Practices

- Review User access levels/settings
- Review Available/Implemented Info Hub Components
- Review/Customize Messaging
  - Initial Messaging
  - Follow up Messaging
- Integrate Info Hub Training for all new members

Launch the Info Hub

- Mass Email Invitation
- Individually

User Management

- Change Username/Password (Non SSO or Dual)
  - Info Hub (member)
  - Back Office (Staff)
  - Impersonate (Staff)
- Disable User (Non SSO or Dual)
- Delete User (Non SSO)

User Account Report (Non SSO or Dual)

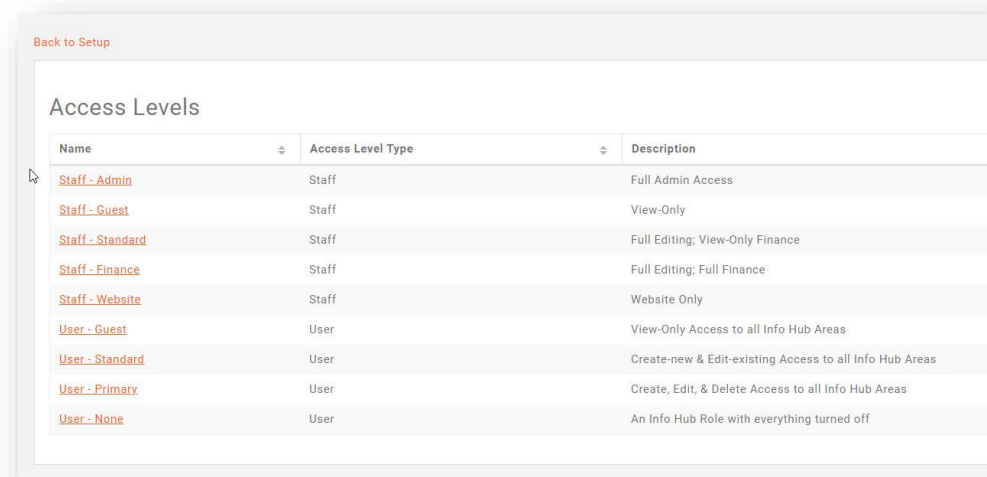- New Users
- Users without Logins

Important!

The functions described in this training session will depend on the following setup:

- **SSO only:** With SSO only setup, National is the Identity Provider and all user names and passwords are managed via National

- **Dual Sign-in:** With this setup, your members may have National credentials and/or GrowthZone credentials. You may be using this scenario if you, for example, have Affiliates that are not in the National database

- **GrowthZone Credentials Only**: Members will use GrowthZone specific user names & passwords, managed via the Growth Zone database

Pre-Launch Best Practices

Review User Account Levels/Settings

Go through each of your user account levels and make sure each area in the Info Hub has the correct level assigned. It can be helpful to have a test contact in your database that you can use to test each level as needed.

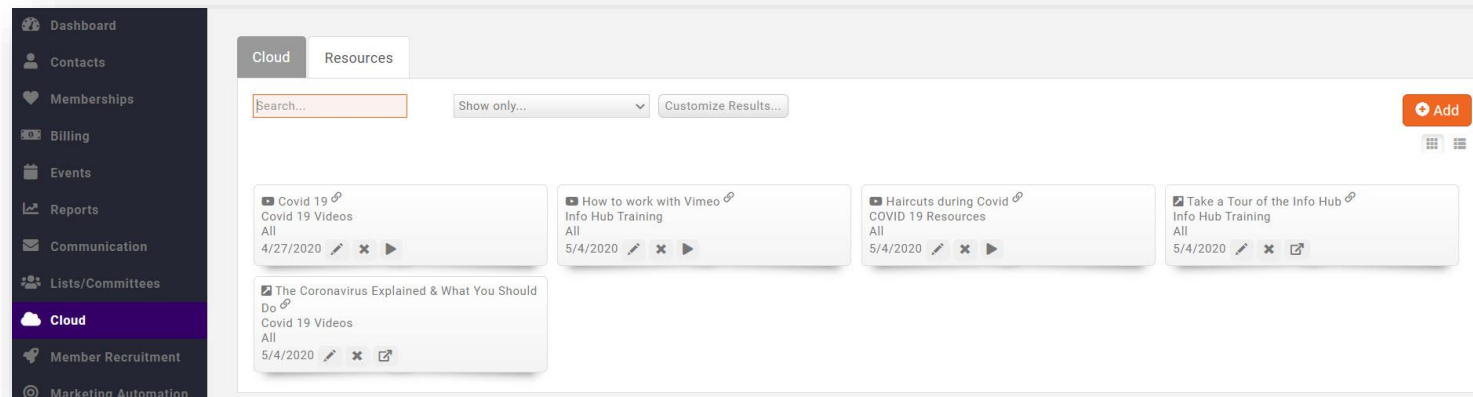WIKI: Create a New User Access Level

Pre-Launch Best Practices

Review Available/Implemented Info Hub Components

Are you using all the components of the Info Hub that are available to you? Be sure your access levels match up with the implemented components (Events, Resources, Web Content, Forum, etc.) and that each component is configured as needed.
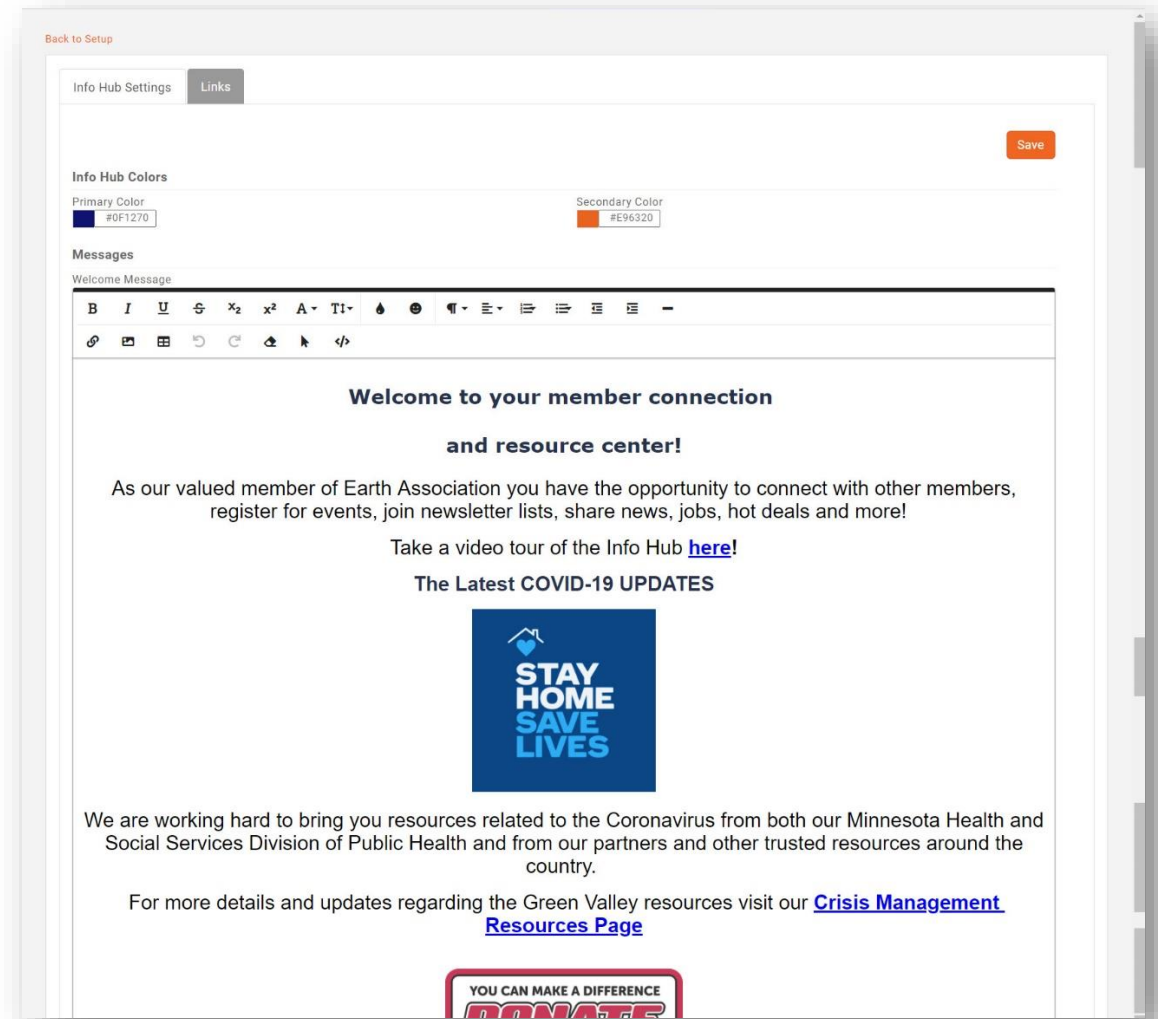

WIKI: Info Hub

Pre-Launch Best Practices

Review and/or Customize Messaging

Don't forget to customize your home page messaging, Info Hub colors, and the email templates you'll be using to communicate with your members.

WIKI: Customize Info Hub Display

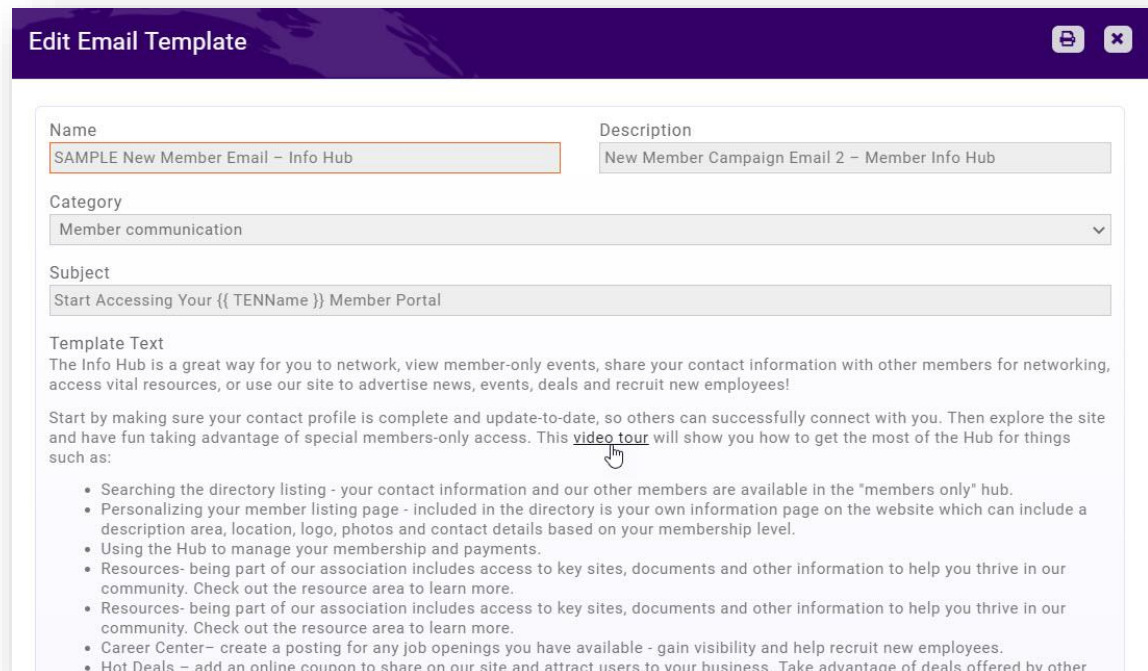WIKI: Create and Manage Email Templates

Pre-Launch Best Practices

Include Info Hub Intro/Tour in New Member Onboarding/Training

As new members come into your organization, it might be helpful to include a tour of the Info Hub in your onboarding process. Consider setting up a series of emails to your new members with links to our "Training for Your Members" series, or make your own.

WIKI: Training for Your Members

Single Sign On (SSO) Only

If you are using SSO...

National's Active Directory application will be the **identity provider**. What this means is that members can continue to use the credentials that they set up when becoming members. If brand new members get added once the SSO is live, then as they get added to AD (either through the sync or manually) the member will receive login information from AD

GrowthZone will use the **National ID** of the member to validate whether the member should have access to the Info Hub
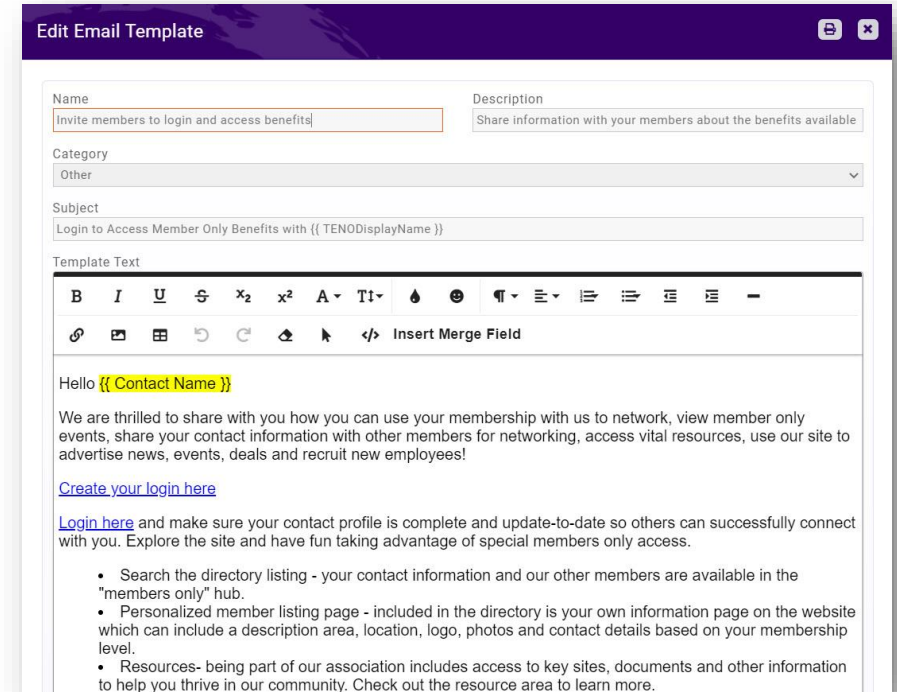
Launch the Info Hub

Mass Email Invitation

Launch your Info Hub by sending a mass/bulk email. You can use the "Invite members to login and access benefits" email template as is, you could customize it, or create your own unique email message inviting your members to create their account and log in.

WIKI: Send a Mass Email
WIKI: Add Report Contacts to a List/Committee
WIKI: Create and Manage Email Templates

Launch the Info Hub

Individual Email

You can also invite members individually from their User Account settings in their contact record. This may be needed if they didn't receive, or missed, the initial invitation email, or you don't include Info Hub information in their initial membership emails.

WIKI: Setting up Individual's Info Hub Access

User Management

IIA – If you are using SSO, National is the Identity Provider so changes to user name and password would be done via National, and not GrowthZone..functions below apply if you are not using SSO

Change Username/Password

- If you have given them permission to do so in their access level, members may change their own username and/or password via the Info Hub

- NOTE: If you are using SSO,

    WIKI: Reset Info Hub Username/Password

- Staff is able to reset passwords in the database.

    WIKI: Set a Temporary Password for an Info Hub User

    WIKI: Send a Reset an Info Hub Password Email to a User

- Staff can also "impersonate" a member in the Info Hub if further troubleshooting is needed.

    WIKI: Impersonate a Member in the Info Hub

User Management

- Staff can "impersonate" a member in the Info Hub if further troubleshooting is needed.

    WIKI: Impersonate a Member in the Info Hub

User Management

Disable User

You can disable a user in the database; this will save their credentials if they eventually need to log in again (like after a leave of absence).

WIKI: Disable User Info Hub Access

Delete User

You can delete a User Account if it is no longer needed (for example, an employee is no longer associated with their employer).

WIKI: Delete User Info Hub Access

User Account Report

The User Account Report + "smart" email lists can help you track and communicate with the members in your organization that do- and don't- have Info Hub accounts created.

WIKI: User Account Report

User Account Report

Use Case 1: We want to send an introductory email to members who created their accounts within the last week.

- Set up User Account Report to find accounts created within the last week.
  - Adjust fields to display as preferred
  - Save this report
- Create a List/Committee and select your report in the "Synchronize Nightly with Report" option
- Select or create an email template for communication
- Include weekly tasks in your procedures
  - Send "Welcome" messaging to the list
  - Update the report dates

User Account Report

Use Case 2: We want to send a reminder email to members that have not yet created their account, inviting them to log in.

- Set up User Account Report to find members without accounts.
  - Adjust fields to display as preferred
  - Save this report
- Create a List/Committee and select your report in the "Synchronize Nightly with Report" option
- Select or create an email template for communication
- Include a regular tasks in your procedures to send "Reminder" messaging to the list at the interval you decide

Questions?

Training and Support

Customer Service Hours:
Monday-Friday: 8am to 5pm (Central)
GZSupport@growthzone.com
800.825.9171, Option 4, then Option 2

Online Support Wiki:
Access Wiki »

Training Calendar:
View Training Event Calendar »

Integrated Help/Chat:
Chat with Support