Vault Admin Dashboard Instructions

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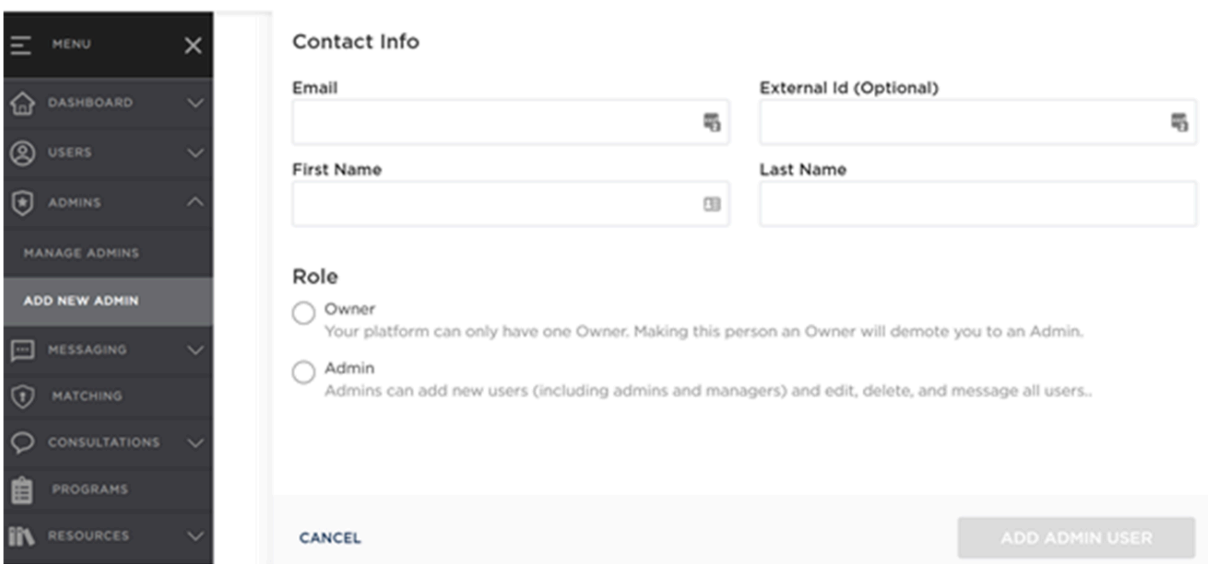
How to Add Admins

The main admin can add additional admin accounts, which can be done when you click the arrow button next to the ADMINS once in your admin dashboard. Two options will be displayed below the ADMINS option. You will select ADD NEW ADMIN.

The required fields to complete are EMAIL, FIRST NAME, and LAST NAME. You will also be required to select a ROLE:

- **Owner** - Your platform can only have one Owner. Making this person an Owner will demote you to an Admin.
- **Admin** - Admins can add new users (including admins and managers) and edit, delete, and message all users.
- ***Program Managers** - Program Managers can add new users, edit, delete, and message users only within their programs. _*This features is not something your campus currently subscribes to so not necessary*_



Once all required fields have been entered, click the box ADD ADMIN USER.

Getting Started with Adding Users to Your Platform

There are two ways in which users can register to join your platform.

The first is via your platform's landing page. Your landing page is the sign-up / sign-in page for your platform. We highly recommend promoting students/alumni to self register, as it allows them to quickly gain access to the platform. To do so, all the new user needs to do is select the *Get Started* blue button, followed by *Register No*w. From there, the new user will be asked to enter in their desired email address, followed by creating a password. Once completed, the user will receive an email asking them to verify their email address. Depending on the school or users email settings, these verification messages might be caught in spam folders.

Second, users can also join if you send them an invitation from your admin dashboard via the process outlined below. The advantage of sending invitations from the admin dashboard is that there are automated reminder emails that invited users receive if they do not complete registration. This removes the need for your team to keep track of which users have registered and which haven't and follow up as reminder emails will automatically go out to those who haven't registered after a period of time.

How to Add Users to Your Platform

Part 1: Prepare your file for upload

Before you upload your users, you'll need to prepare a CSV file that lists out all of the users you'd like to invite. Our system requires that the file follows a particular format, and all of the specifications are listed below. If you are only planning to invite a single user, please skip the below and follow the instructions listed under Part 2. However, for individual uploading, we strongly encourage you to simply allow your users to self register via your platform sign-up link.

- Your list must include three required pieces of information for each user: email address, first name, and last name.
- These required fields must be listed as individual columns in your file in the order listed above.
- Optionally, your file can include a fourth column in which you may include a unique ID number such as a student ID number.
- Your file should not include a label/header row.
- Your list must be saved as a CSV file.

	A	B	C	D
1	fredrik123@firsthand.co	Fredrik	Maroe	10007
2	john123@example.com	John	Doe	12345
3	sam123@example.com	Sam	Pell	98765
4	rachel123@example.com	Rachel	Bloggs	45678
5	david123@example.com	David	Smith	43210

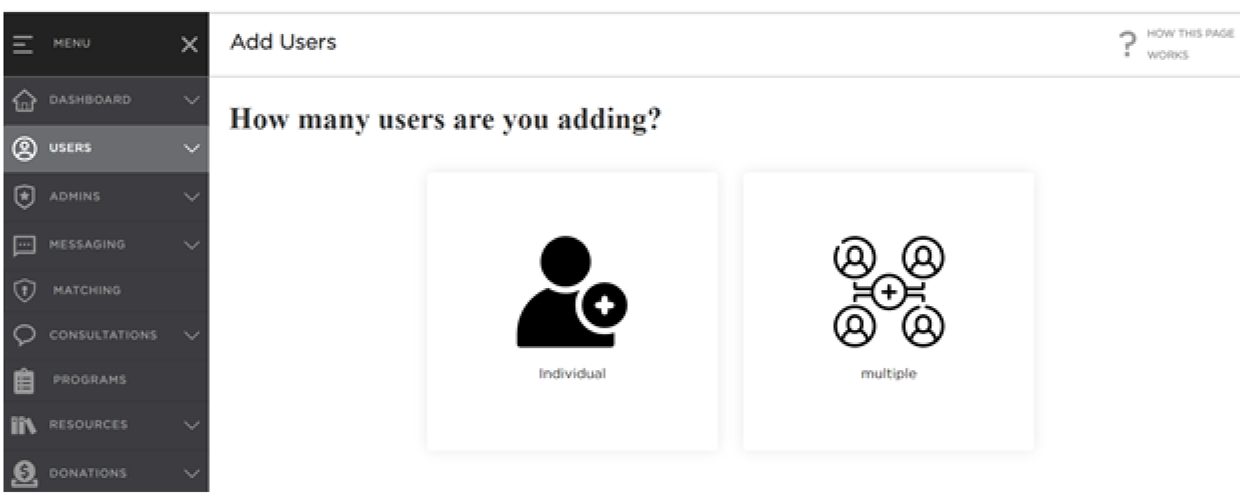
Part 2: Upload Users

1. Select “Users” from the menu options on the left side of the admin dashboard.

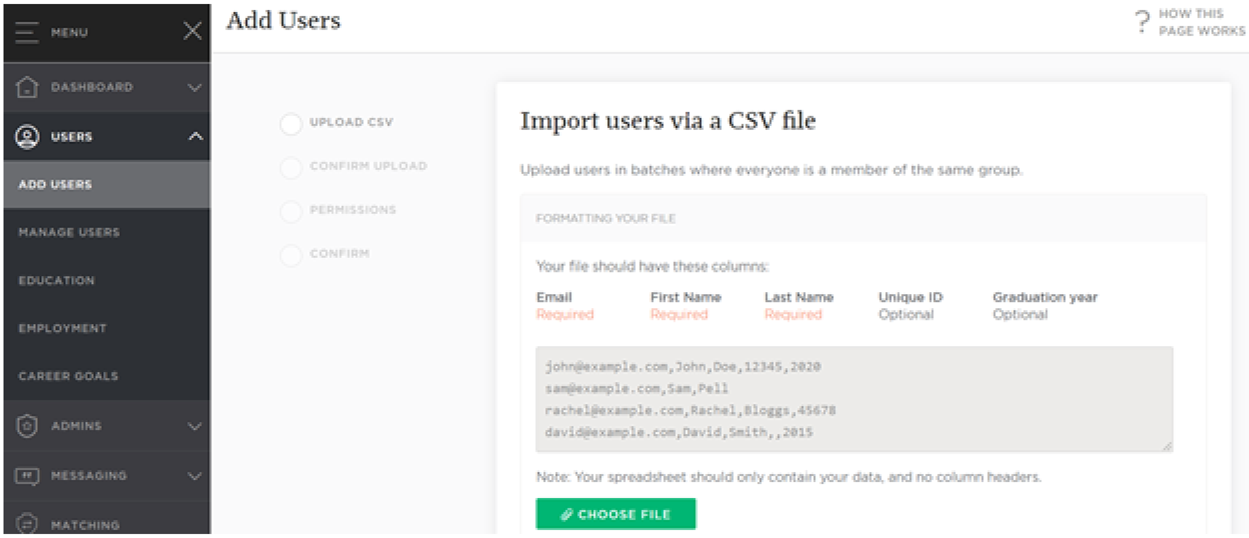
2. Click “Add Users.”

3. Select the option that says "Multiple"

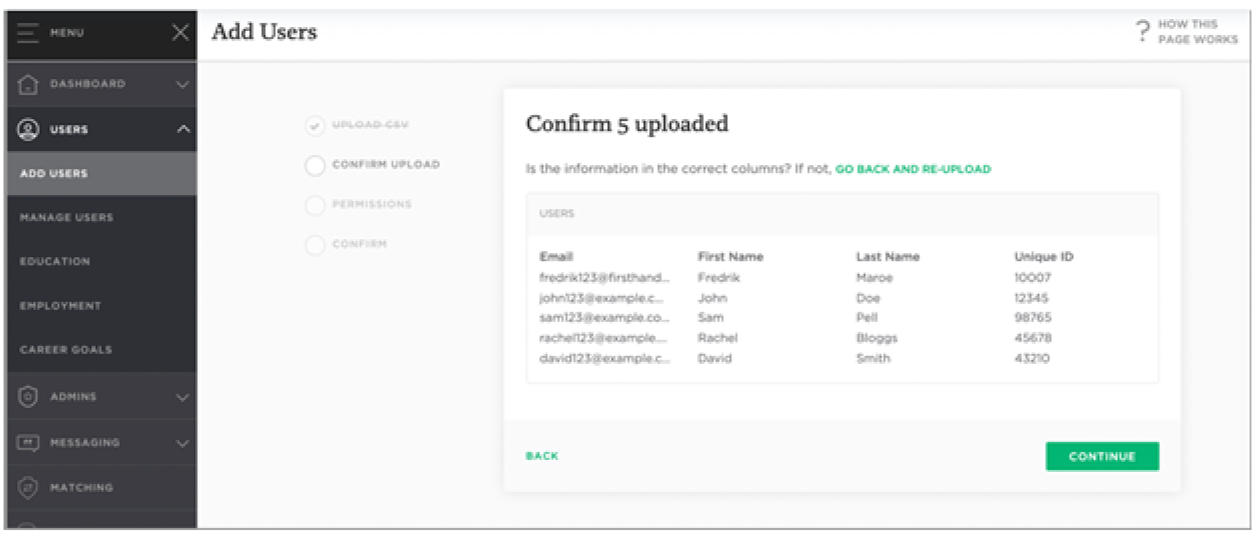
Alternatively, you can click the option that says "Individual" to manually invite a single user. You will want to Skip steps 4 and 5 below.



4. Click the "Choose File" button to attach your list and then click "Continue."

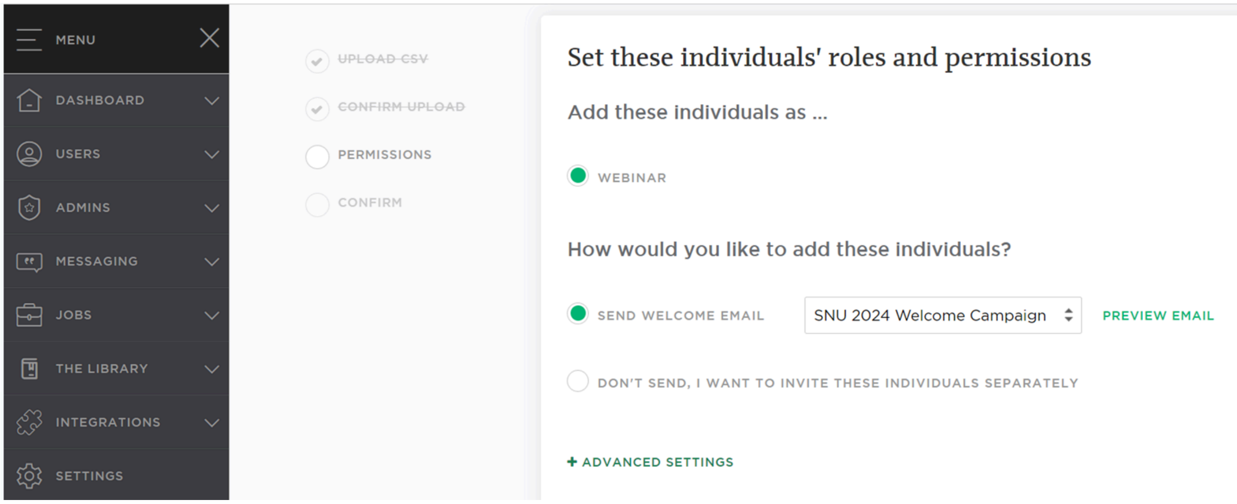


5. If there are any errors in your file, such as duplicate or incomplete email addresses, they will be listed on the next page. You'll need to correct the errors in your CSV file and then re-upload it using the steps above. If there are no errors, you will be asked to confirm that your information is listed in the correct columns before clicking "Continue."



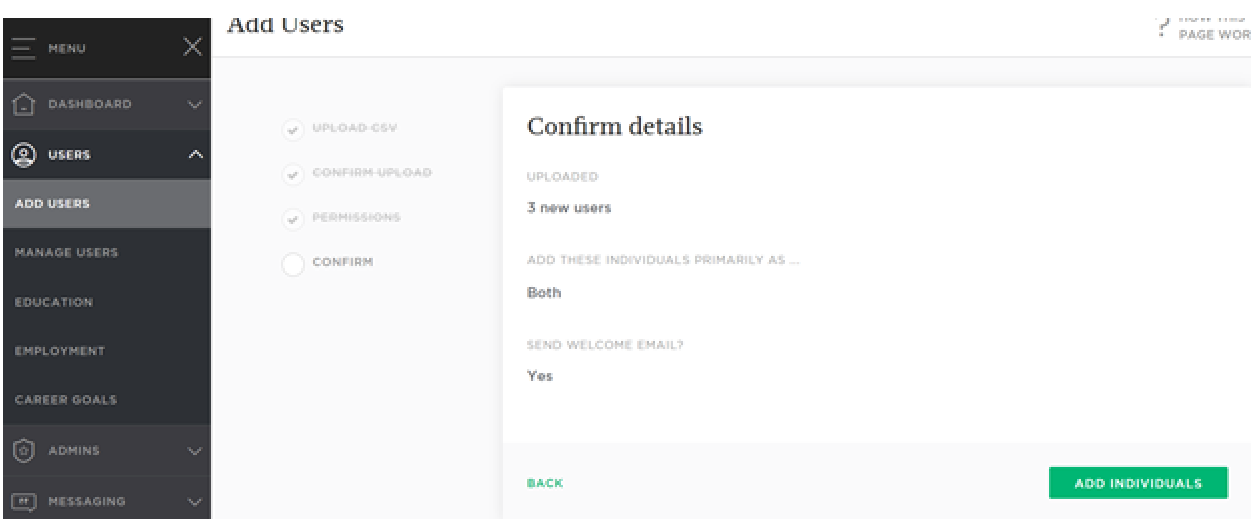
6. We recommend that you keep the "Send Welcome Email" option selected so that the users on your list receive an email which notifies them that they have been invited to join your platform and includes a unique registration link. Choose the welcome campaign you'd like to use from the dropdown list and then click "Continue". If you've created custom welcome campaigns, they will show up in the dropdown list.

See "*Creating Custom Welcome Campaigns"* on page 4 for more information.



7. There is no need to click the "Advanced Settings" button. That is only needed if you would like to add all of the users on your list to include an internal note or set a graduation year for the users on the list. Please note that your users will be asked to indicate their graduation year upon registration in order for the information to be captured. This lengthens the time it takes for a user to complete registration, which is why we advise not using it if possible.

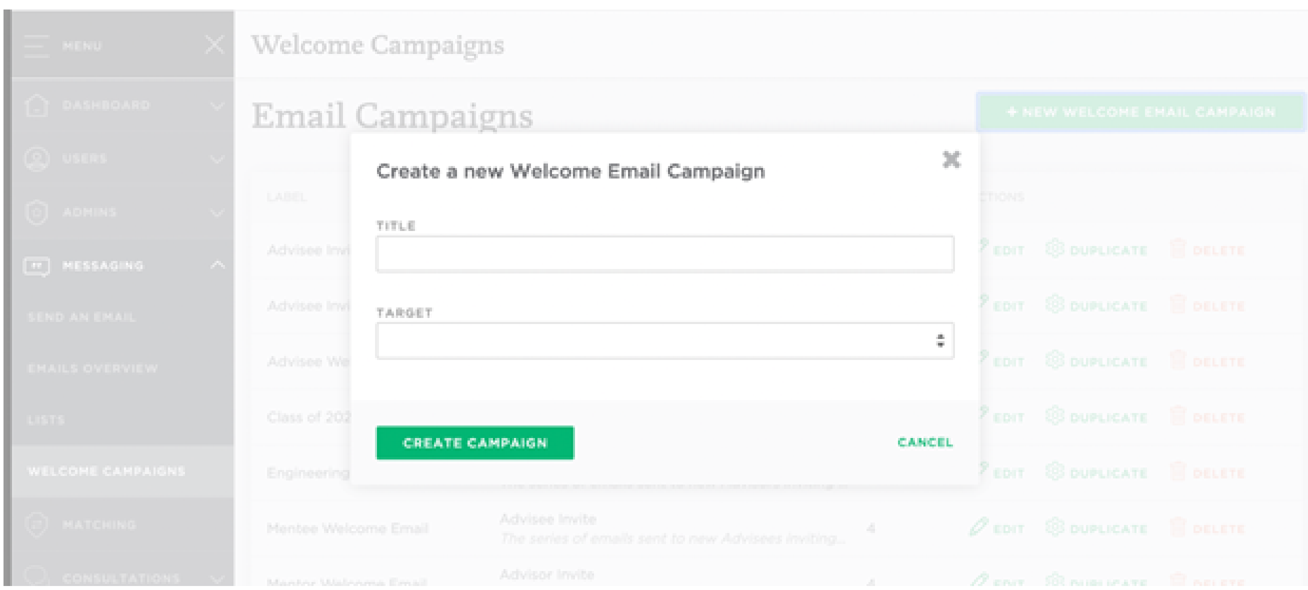
8. Confirm that everything shown on the last page is correct and then click "Add Individuals." Depending on the number of users, uploading may take some time to process. Once processing is complete, the users that were just invited will receive a welcome email and will appear in the list on the Manage Users page. For a large user upload, you may receive a confirmation email that includes a detailed breakdown.



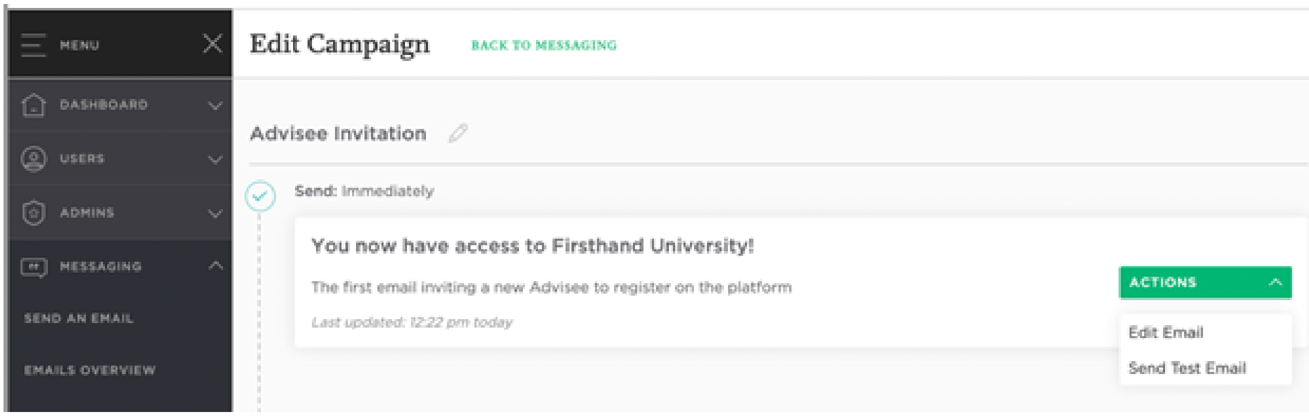
Creating Custom Welcome Campaigns

Users who are invited from your admin dashboard may be sent custom welcome emails upon invitation. These email campaigns include an initial invitation email, which lets the user know that they have been given access to your platform and provides a registration link, as well as three registration reminder emails that go out 7, 30, and 90 days after the initial invitation is sent.

1. *Creating a New Welcome Campaign*
2. Select “Messaging” from the menu options on the left side of the admin dashboard.
3. Click “Welcome Campaigns.”
4. Select the option that says "New Welcome Email Campaign."
5. Enter a name for your welcome campaign in the "Title" field, select the user type that your email campaign will target, and then click "Create Campaign."



6. You will see that a welcome campaign with four emails (an initial invitation email and three reminders) has been created. The emails contain our default copy, which can be used as a starting point, but you can update them by clicking the "Actions" button next to one of the emails and then click "Edit Email" to update the email copy.



7. Use the email editor tool to update the fields in your email and then click "Save". You may update the fonts, insert images, and add hyperlinks using the buttons in the toolbar above the body text section. Click the buttons in the Merge Tags section on the right to copy and paste coding into the body section that will allow you to personalize the email with the user's name or link to their account pages.

    - Please note that the email address listed in the "From Email" field is a customer support email address that was set up when your platform launched. Replies to this email address will go to Vault's customer support team. The vast majority of emails sent to this address in response to welcome emails are questions regarding how to register or use the platform that our support team can easily respond to. In rare cases where we are sent an email that is meant for your team, we will get in touch with you.
    - By default, the email will include a registration link at the bottom in the hyperlink that says, "Join Now". You can update the positioning of this link or change the hyperlink text that is displayed, but please do not remove it completely as your users will not know where to sign up.

Editing a Welcome Campaigns

From the Edit Welcome Campaign page, an admin can:

- Select whether the emails should skip weekends: If an email's scheduled send falls on a weekend, it will automatically reschedule to send on the next business day.

- Edit the email's content: The emails contain our default copy, which can be used as a starting point, but you can update them by clicking the "Actions" button next to one of the emails and then click "Edit Email" to update the email copy.
- Send a test email: To preview an email before using it in your campaign, you can send a test email to yourself or a team member via the "Actions" button.
- Adjust the timing of when an email gets sent: The default send timing can be adjusted by clicking "Edit Timing" under the "Actions" button. This will prompt a modal with options to send the selected email 1-6 days or 1-6 weeks after the previous email in the campaign was sent. If it is the first email in the campaign, you are selecting the timing relative to when a person is added to the platform.
- Delete an email from the email campaign: Under the "Actions" button, select "Delete Email." This will prompt a confirmation modal. Deleting an email will remove it from the campaign completely, and the following email (if applicable) will be the next sent in the campaign schedule.
- Add an email to the campaign schedule: Clicking "Add Email" will add a new empty email to the end of the campaign.

Please note: Deleting an email in a welcome campaign will only affect future users added to the platform. Meaning users who are added to the platform after the welcome campaign was updated, will see the updated welcome campaign schedule.

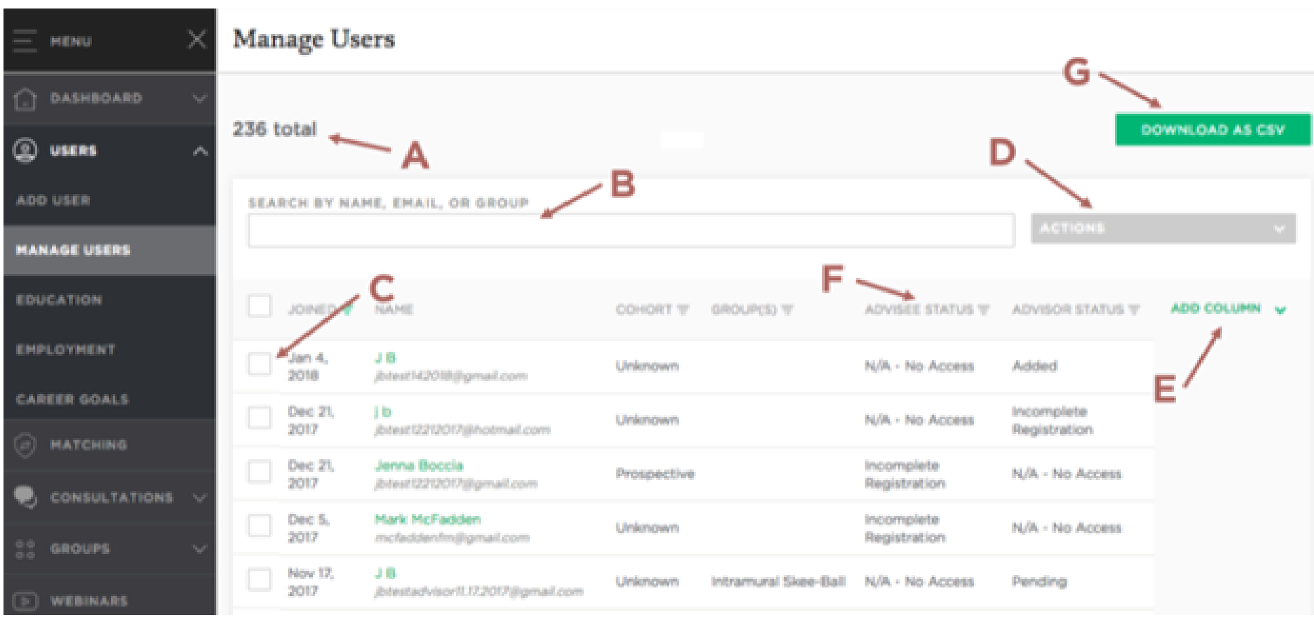
Navigating the Manage Users Tab

Vault's admin dashboard has a lot of useful data that you have access to. All data is organized in smart tables, allowing you to sort and filter your data and download it to an excel sheet.

The **Manage Users** tab has general information on all users. Here are some important elements of this table:

A. **Total Number of Users:** On the top left of the page, you'll see a total number of users. If you filter any of the columns in the sheet, you'll also be given a total number of users based on the filter you set.
B. **Search Bar:** Search for groups, names, grad years, and more in the custom search bar.
C. **Selection Box: Click** this box to select a current user(s) to update or change their settings (see D).

D. **"Actions" Button:** Once you've selected a user(s), you can click this button to approve or reject the user, add or remove them from a group, change their graduation year, and more.
E. **"Add Column" button:** This will allow you to add more data points to your report including graduation year, date of last login, advisor current location, number of consultations, and notes.
F. **Column Title:** When you click each column title, you'll be able to filter or sort your data.
G. **"Download as CSV" button:** Click this button to download all of the data you see on the smart table.



Here are common functions you'll likely use in the manage users tab:

- *Added* - account was added by a platform administrator
- *Incomplete Registration* - started registration but navigated away from the page before completing all steps in registration
- *Live* - has an active and complete profile

Add More Data to Your User Report

If you'd like to see more data that's not displayed, you can click "Add Column" and select the data you want to see/download. After adding a column, you can click "Download as CSV" to download all the data you see. We have data points on graduation year, date profile created, advisor rating, advisor current employer, and more.

Modify Group Membership

If you want to add or remove a user to or from a group, follow these steps:

1. Check the box beside the user(s) you'd like add or remove from a group
2. Click "Actions," then "Modify Group Membership"
3. Select either "Add to Group(s)" or "Remove from Group(s)"
4. Add/remove the user to the group(s) you'd like and click "Save"