

GrowthZone: Info Hub Part 3: Launch and User Management

Info Hub: Launch and User Management

Now that we've set up, customized, and can manage submissions and content in the Info Hub, it's time to launch it to our members.

Today we'll go over some best practices prior to launch; how to invite your members both in bulk and individually; how to manage usernames and passwords and account access; and finally, we'll look at the User Account Report.

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*
 - *Info Hub (Member)*
 - *Back Office (Staff)*
 - *Impersonate (Staff)*
- *Disable User*
- *Delete User*

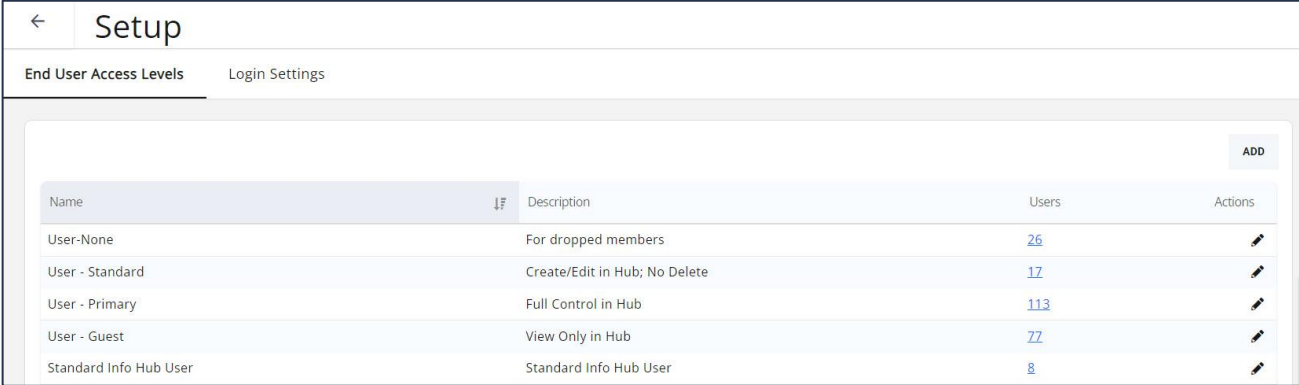
User Account Report

- *New Users*
- *Users without Logins*

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.



The screenshot shows a mobile application interface for 'Setup'. Under the 'End User Access Levels' tab, there is a table with the following data:

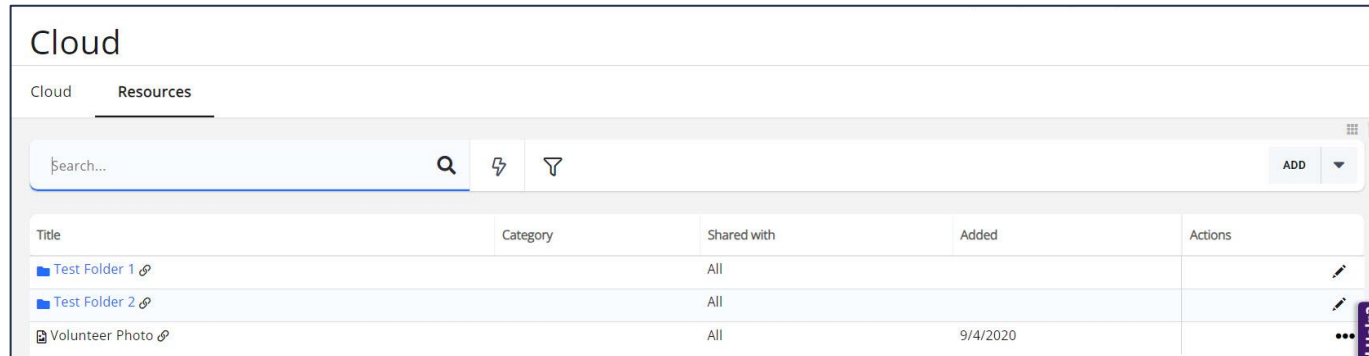
Name	Description	Users	Actions
User - None	For dropped members	26	[Edit]
User - Standard	Create/Edit in Hub; No Delete	17	[Edit]
User - Primary	Full Control in Hub	113	[Edit]
User - Guest	View Only in Hub	77	[Edit]
Standard Info Hub User	Standard Info Hub User	8	[Edit]

Knowledge Base: [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.



The screenshot displays the 'Cloud Resources' interface. At the top, there is a search bar with the placeholder text 'Search...'. Below the search bar is a table with the following columns: Title, Category, Shared with, Added, and Actions. The table contains three rows of data:

Title	Category	Shared with	Added	Actions
Test Folder 1		All		
Test Folder 2		All		
Volunteer Photo		All	9/4/2020	

Knowledge Base: [Info Hub](#)

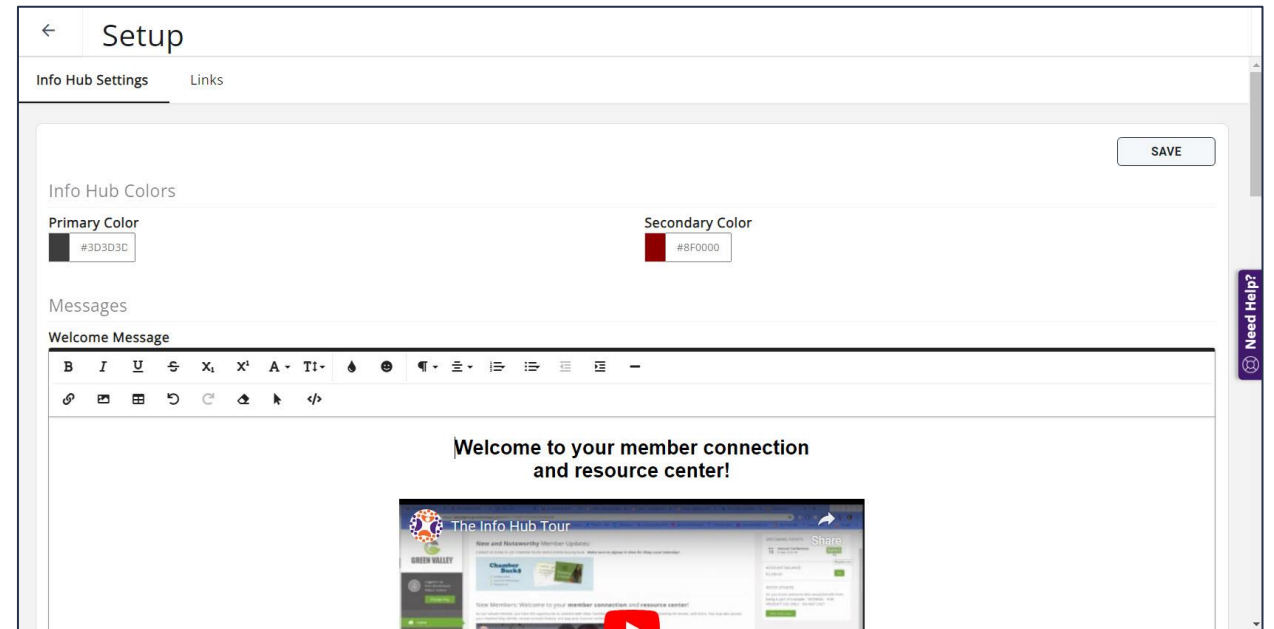
Pre-Launch Best Practices

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.

Knowledge Base: [Customize Info Hub Display](#)

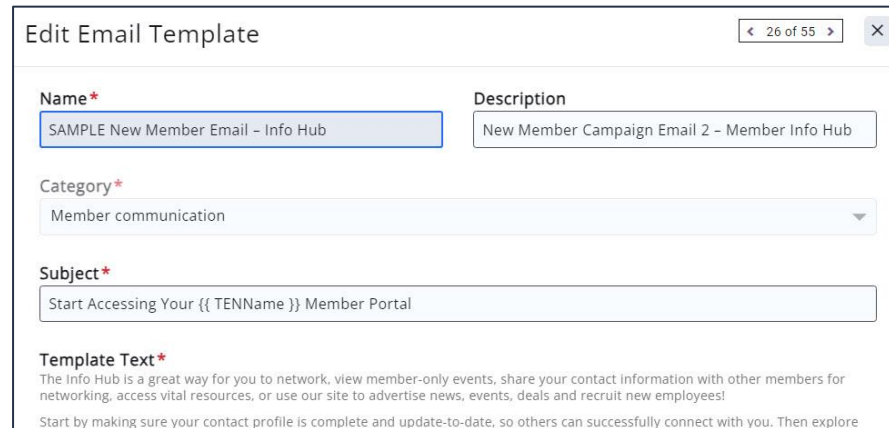
Knowledge Base: [Create and Manage Email Templates](#)



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.



The screenshot shows a web form titled "Edit Email Template" with a close button and a page indicator "< 26 of 55 >". The form contains the following fields:

- Name***: A text input field containing "SAMPLE New Member Email - Info Hub".
- Description**: A text input field containing "New Member Campaign Email 2 - Member Info Hub".
- Category***: A dropdown menu with "Member communication" selected.
- Subject***: A text input field containing "Start Accessing Your {{ TENName }} Member Portal".
- Template Text***: A text area containing the following text:
The Info Hub is a great way for you to network, view member-only events, share your contact information with other members for networking, access vital resources, or use our site to advertise news, events, deals and recruit new employees!
Start by making sure your contact profile is complete and update-to-date, so others can successfully connect with you. Then explore

Knowledge Base: [Info Hub Training for Your Members](#)

Launch the Info Hub

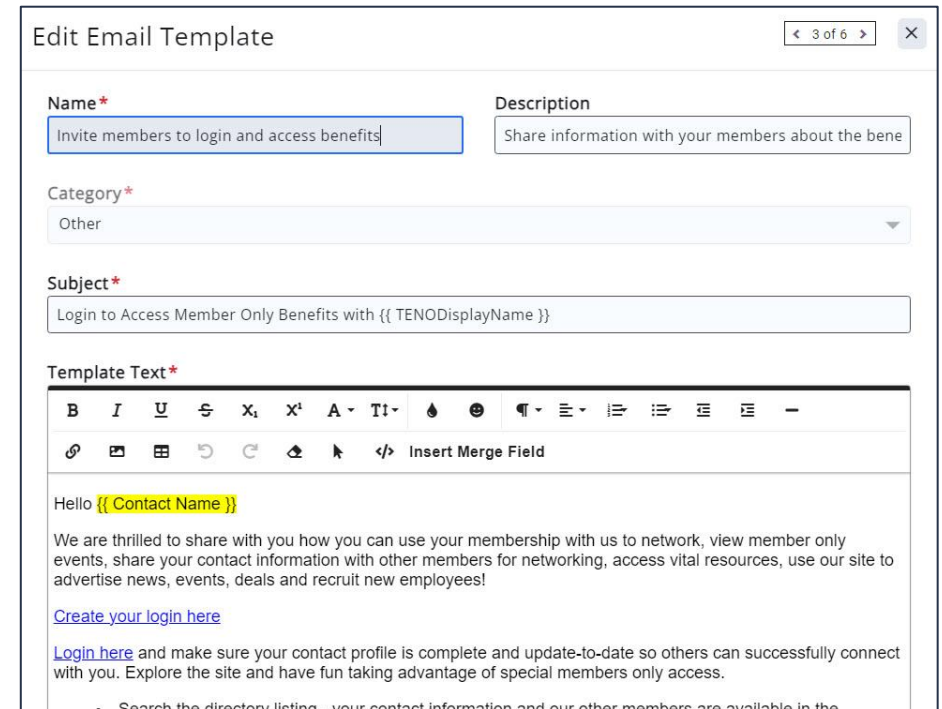
Mass Email Invitation

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.

Knowledge Base: [Send a Mass Email](#)

Knowledge Base: [Add Report Contacts to a List/Committee](#)

Knowledge Base: [Create and Manage Email Templates](#)



The screenshot shows the 'Edit Email Template' interface. At the top right, there is a navigation bar with '< 3 of 6 >' and a close button 'X'. The form has several fields:

- Name ***: A text input field containing 'Invite members to login and access benefits'.
- Description**: A text input field containing 'Share information with your members about the bene'.
- Category ***: A dropdown menu with 'Other' selected.
- Subject ***: A text input field containing 'Login to Access Member Only Benefits with {{ TENODisplayName }}'.
- Template Text ***: A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and other formatting options. The text area contains:
Hello **{{ Contact Name }}**
We are thrilled to share with you how you can use your membership with us to network, view member only events, share your contact information with other members for networking, access vital resources, use our site to advertise news, events, deals and recruit new employees!
[Create your login here](#)
[Login here](#) and make sure your contact profile is complete and update-to-date so others can successfully connect with you. Explore the site and have fun taking advantage of special members only access.
• Search the directory listing - your contact information and our other members are available in the

Launch the Info Hub

Individual Email

Edit User Access ✕

Access Level ⓘ
User - Standard ▼

Login Info

Login Username
(the Contact does not have a Login)

Password Reset Email ⓘ
bradley.staveteig@mailinator.com

User Login and Security email will always be sent to the Contact's Primary Email Address

Send Login Instructions Email ⓘ

Manually Set Password ⓘ

You can also invite members individually from the 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.

Knowledge Base: [Provide Info Hub Access to Individual Contacts](#)

User Management

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.
 - Knowledge Base: [Reset Password from Info Hub Login Screen](#)
 - Knowledge Base: [Reset Username via the Info Hub](#)
- Staff are able to reset passwords in the database.
 - Knowledge Base: [Set a Temporary Password for an Info Hub User](#)
 - Knowledge Base: [Send an Info Hub Password Reset Email](#)
- Staff can also “impersonate” a member in the Info Hub if further troubleshooting is needed.
 - Knowledge Base: [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).

Knowledge Base: [Disable 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).

Knowledge Base: [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.

Knowledge Base: [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:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »