Admin FAQ sheet

What does it mean to be an administrator?

An administrator, or admin, has admin privileges in their group. This means that they have the ability to modify the group settings, add new users and impacts, create and manage events, and more.
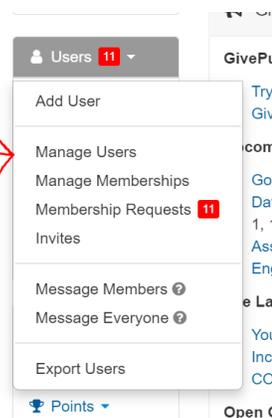
Who should have admin privileges?

Admin privileges should be for anyone in charge of a group. For example, for Waltham Group programs, coordinators should possess admin privileges. If someone needs admin privileges, but does not have them, please email engagedeis@brandeis.edu.

How do I change/update admins?

<u>If a user already is a part of your group</u>, you can make them an admin by:

1. From your group dashboard, select "users" from the tool bar on the left of your screen. Select "manage users" from the drop-down menu.

2. This will list all of the users currently in your group. Check the box next to the name of the person you wish to make an admin and then scroll to the left.

3. The "actions" tab (see above) will allow you to change the roll of the member you have selected. Simply select "make admin" from the drop-down menu OR "remove admin role" if you wish to remove a user as an admin.

<u>If you wish to add a new user to your group as an Admin</u>, you'll need to navigate to Users > Add User within your group dashboard. This will allow you to manually input a new admin. Be sure that you set the 'Role' to Admin.

To learn more about adding/managing users, please watch this video.

How do I set up my group's page?

Once you have admin privileges, you can customize your group's profile page. First, navigate to your group's dashboard. You can do this by clicking the "manage" button at the top right of your screen and selecting your group from the drop-down menu.

Or, if you are on your group's profile page, you can select the blue "manage" button on the far left of your screen.
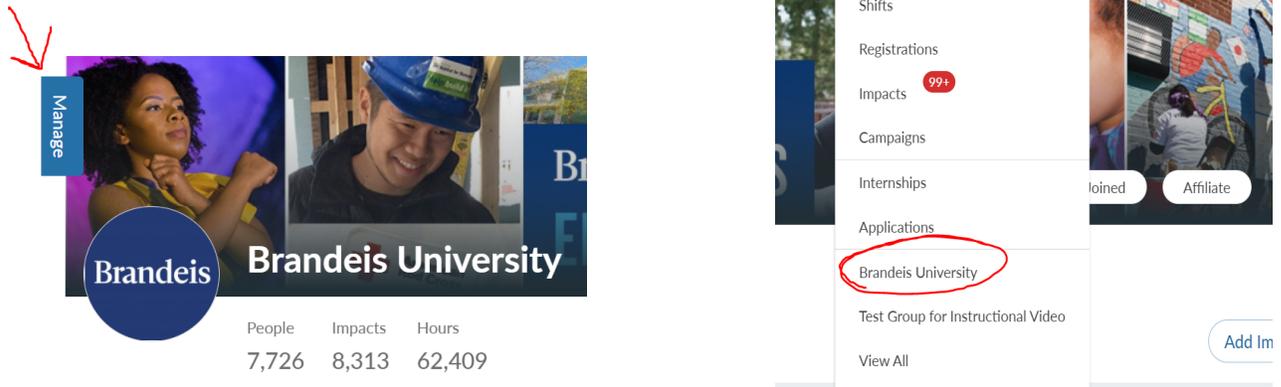
Once you are on the group dashboard, the tool bar on the left side of your screen will help you navigate different actions. Each option will allow you to manage that category. For example, you can manage users under the "users" tab or create and manage events under the "events" tab. Simply use the drop-down menus to perform actions.

Selecting "edit group" from the toolbar will allow you to customize your group's profile by adding cover photos, descriptions, causes, and more. To learn about how to set up your group page, please watch this video.

How do I create and customize an event?

First, login and navigate to your group dashboard. On the group dashboard, click the "Events" tab on the left-hand menu and then select "add event."

You will then be prompted to fill out the required fields for your event. You will need to enter the following details:
- **Name:** A short, clear name for the event
- **Type:** Single day, multi-day, or recurring for specific dates; open opportunity if there are no defined times
- **Privacy Settings:** If you decided to make the event private, there is a settings section that will allow you to make that happen. Note, there are various different levels of privacy.
- **Participants Needed:** the amount of people you believe will be needed. If you have an unlimited number, set it as "-1."
- **Admin:** the choices available include members and existing admins in your group. The admin will show up as the point of contact on the event page.

- **Description:** do not copy and paste. Make the content short, concise, and enticing, this will drive more interest.

There are all kinds of ways to customize your event. Be sure to go through each option to ensure that your event meets all of your requirements. Next, select "Save and Continue" at the bottom right-hand corner. DO NOT HIT PUBLISH. The save and continue button will send you to advance settings where you can customize your impacts and registrations.

To learn more about creating and managing events, watch this video.

Should my event be private or public?
This depends on the nature of your event! See below to learn about who can see your events based on the privacy settings and decide which option is best for your event.
- Public = All of GivePulse (if group is public)
- Private - Entire Network = Your group, parent groups, and affiliates.
- Private - Primary Network = Your group and parent groups.
- Private - Group Only = Just your group.
- Private - Invite Only = Only people that you send an invite to.

How do I cancel/edit an event?
From your group dashboard, select the "events" tab and select "manage events" from the drop-down menu. All of your group's events will populate on the screen.

You can toggle between past, current, and future events by using the top toolbar. The "status" tab will allow you to choose past or future events. The "published" tab will allow you to toggle between published or unpublished events. This is where you can find saved drafts of events that have yet to be published.

	Event	Group	Start Date	Needed	Filled	People	Status	Published
☐ ⚙️	RIC Closing Ceremony & Workshop #4	Roses In Concrete (RIC)	12/02/2021	16	0	0	Future	Yes

To cancel an event, select the event and go to the "actions" tab on the far right of the toolbar.

Status	Published	Organizer	Organizer Phone	Organizer Email	Tags	Actions
Future	Yes	Lucas Malo	7817363237	lmalo@brandeis.edu		

You will select the "delete event" from the drop down menu. Note the actions tab drop down menu has several action options to choose from.

To learn more about cancelling or editing your event, please watch this video.

How do I reach out to my group users?

Once you go onto your group dashboard, navigate to the "users" tab on the toolbar and select "Manage Users" from the dropdown menu. This will give you the option to message members. The message box will function similarly to an email. Note:

- You can message individual users by selecting "manage users" and selecting an individual. Use the "actions" tab to message individually.
- You can message only the registrants for a specific event by going to "manage events," selecting an event, and selecting "message registrants" from the drop down menu under "registrations."

Who should verify impacts for the group?

Any admin of a group can verify impacts. Groups should make sure their group name and email are listed as the primary administrator (see this video to learn how to set administrators). Setting the group email as the primary administrator streamlines the verification process and allows each member with access to the primary admin email to see and verify hours.

How often should I verify impacts?

The group admins should ensure that impacts are being verified in a timely manner. Consult among your group members to decide a schedule or a point-person for checking that student impact hours get verified. It would be useful to check at least once a week, especially if events are frequent in your group.

How do I verify impacts?

From your group dashboard, select the "impacts" tab on the left-hand toolbar. Then, select "manage impacts" from the drop-down menu. You will usually see the number of waiting actions in red.

This page will show ALL impacts created by your group members. This means that you will need to filter pending impacts to make the verification process more efficient. You can filter two ways:

1. Select the notification at the top of the "manage impacts" dashboard.

You have 75 Impacts that need to be verified. To view click here or filter by verified = pending below
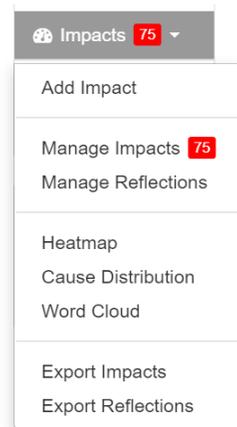
2. Or, use the filters above the impacts to toggle to "pending" impacts by selecting the drop-down menu under "Verified."

Name	and Feedback	Start Date	Start Time	Group	Verifier	Hours Served	Verified
⋯						⌄	Pending ⌄
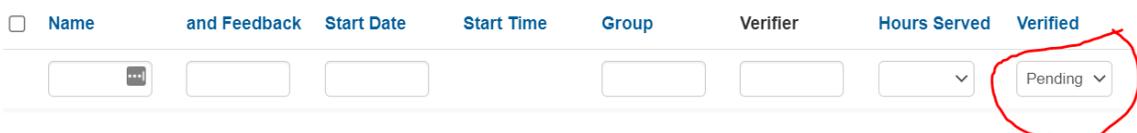
Once you have filtered the list to pending impacts, you can start verifying! Use the check marks to select the member you wish to verify.

Use the "actions" tab to select your action. This tab will allow you to "verify" or "dispute" member impacts.
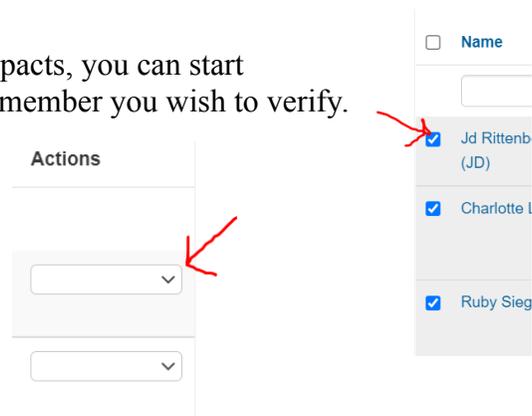
What if a volunteer's hours are incorrect?

If a volunteer logged an incorrect amount of hours or counted hours twice, simply hit the "dispute" button under the actions tab when verifying hours. When you dispute an impact, you have the opportunity to add notes to the dispute. The system will notify the volunteer and they can update/correct their hours accordingly. Once they submit their hours, the verification process will be the same.

What if I'm getting too many EngageDeis Emails?

Click on your name > account. Scroll all the way down on this page (labelled Basic Info). There is a toggling function for Opt In vs. Opt Out of emails.
By opting out, the below are some of the emails you will no longer receive:

- New Registration Alert
- Affiliate published an event
- Affiliation requests
- New Impact
- Impact Verified
- Verification Needed
- Membership Requests
- Survey Response
- Survey Response Confirmation
- New Internship Applicant Alert
- New Registration Approval Alert
- Cancelled Registration
- Welcome to Group emails when you join a new group as its member
- Miscellaneous emails coming from GivePulse
- Notifications informing you about impacts that have been modified
- Weekly updates and insights from GivePulse about groups you oversee (as administrator)
- Reminder email of a group you have been given administrative access to claim

Emails you will <u>continue to receive</u> after opting out:
- Messages from admins and users who try to communicate with you within GivePulse
- Invites to groups and events
- New membership
- Event registration confirmation and event reminders
- Impact verification emails for an event which you are registered to and participated in
- Comments from other users on impacts or wall posts you have created
- Reset Password
- Email verification