

# GrowthZone - Info Hub Pt. 3: Launch and User Management



## 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

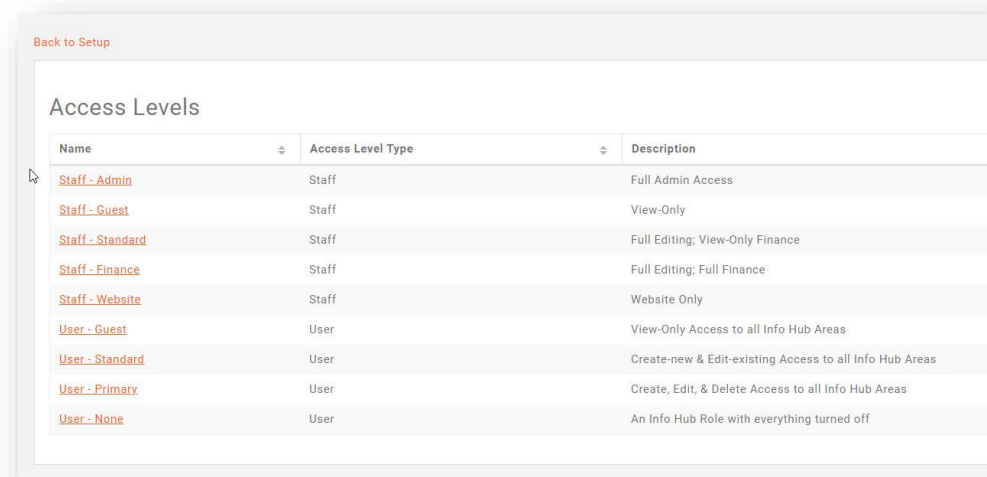
# Important!

**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

## 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.



Back to Setup

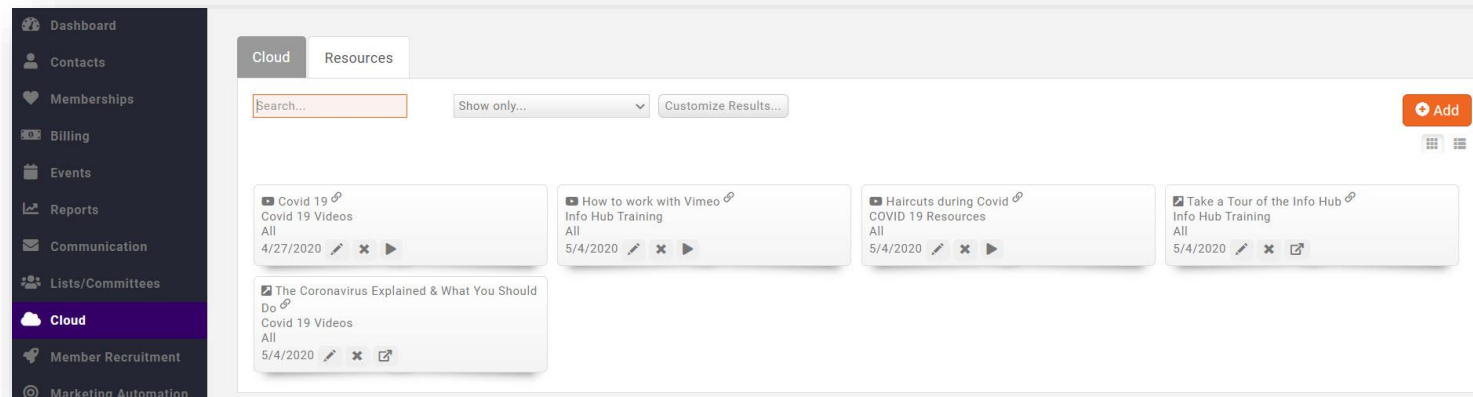
### Access Levels

Name	Access Level Type	Description
<a href="#">Staff - Admin</a>	Staff	Full Admin Access
<a href="#">Staff - Guest</a>	Staff	View-Only
<a href="#">Staff - Standard</a>	Staff	Full Editing; View-Only Finance
<a href="#">Staff - Finance</a>	Staff	Full Editing; Full Finance
<a href="#">Staff - Website</a>	Staff	Website Only
<a href="#">User - Guest</a>	User	View-Only Access to all Info Hub Areas
<a href="#">User - Standard</a>	User	Create-new & Edit-existing Access to all Info Hub Areas
<a href="#">User - Primary</a>	User	Create, Edit, & Delete Access to all Info Hub Areas
<a href="#">User - None</a>	User	An Info Hub Role with everything turned off

WIKI: [Create a New User Access Level](#)

## 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](#)

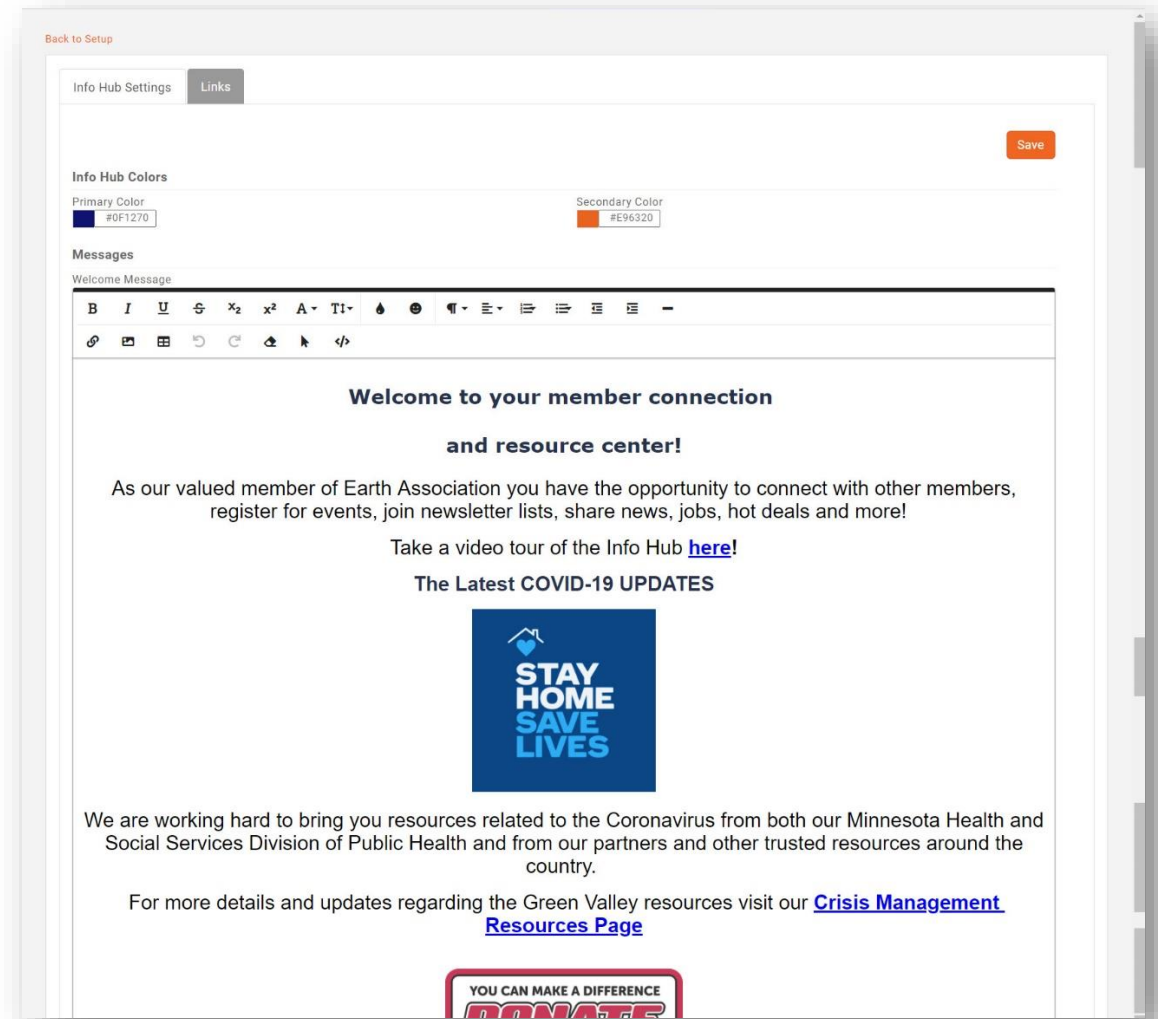
# Pre-Launch Best Practices

## 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](#)

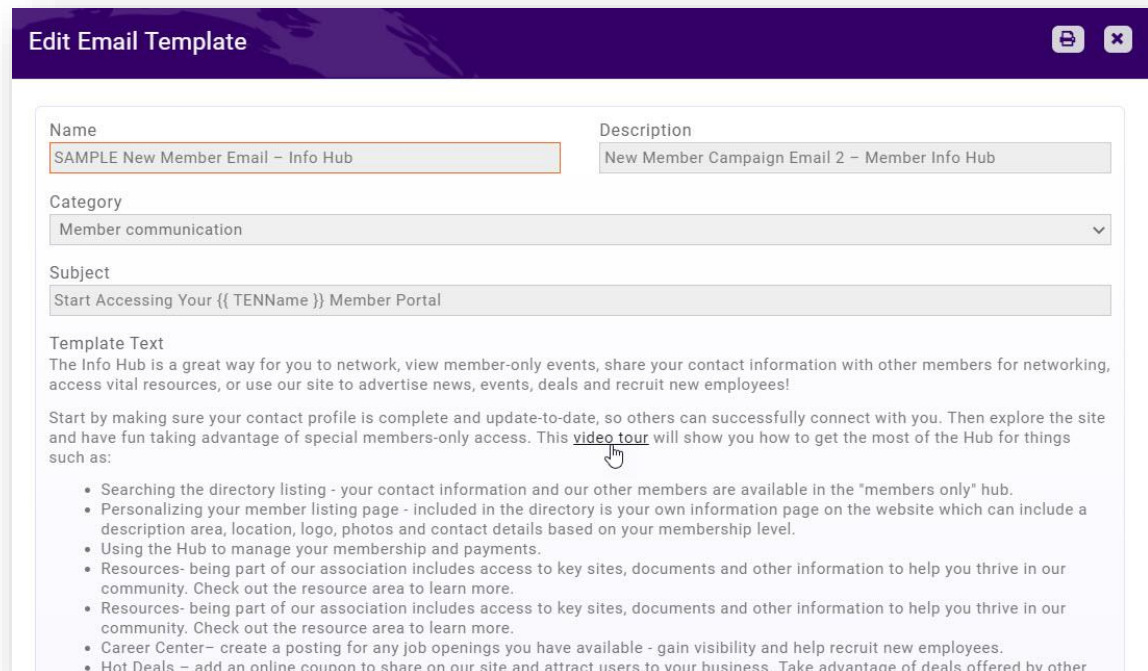
WIKI: [Create and Manage Email Templates](#)



## 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](#)



The screenshot shows the 'Edit Email Template' interface. The title bar is purple with the text 'Edit Email Template' and window control icons. The main content area is white and contains the following fields:

- Name:** SAMPLE New Member Email - Info Hub
- Description:** New Member Campaign Email 2 - Member Info Hub
- Category:** Member communication (dropdown menu)
- Subject:** Start Accessing Your {{ TENName }} Member Portal
- Template 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 the site and have fun taking advantage of special members-only access. This [video tour](#) will show you how to get the most of the Hub for things such as:

  - Searching the directory listing - your contact information and our other members are available in the "members only" hub.
  - Personalizing your member listing page - included in the directory is your own information page on the website which can include a description area, location, logo, photos and contact details based on your membership level.
  - Using the Hub to manage your membership and payments.
  - Resources- being part of our association includes access to key sites, documents and other information to help you thrive in our community. Check out the resource area to learn more.
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  - Career Center- create a posting for any job openings you have available - gain visibility and help recruit new employees.
  - Hot Deals - add an online coupon to share on our site and attract users to your business. Take advantage of deals offered by other

# 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

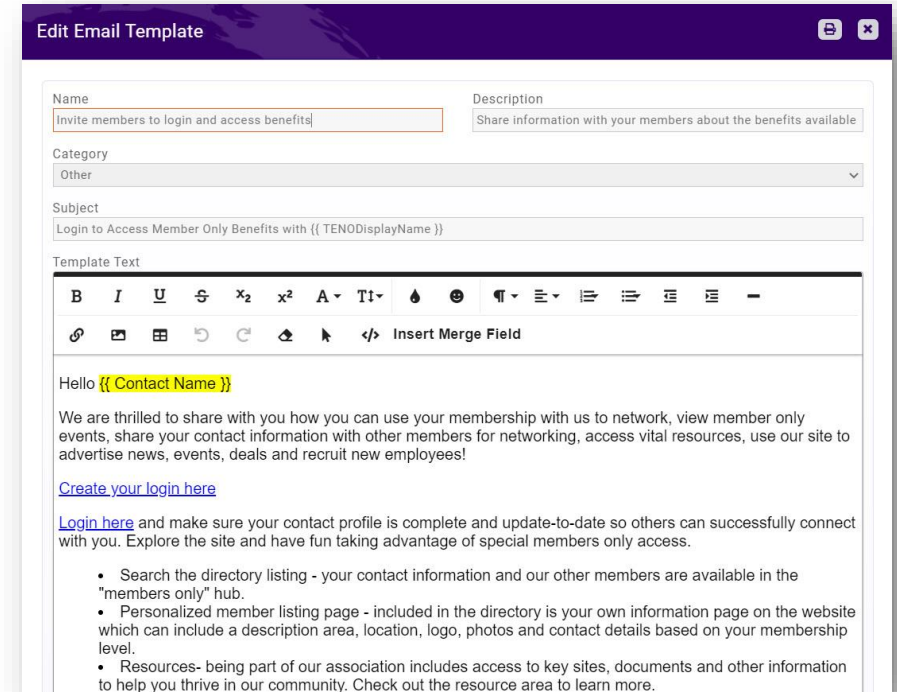
## Mass Email Invitation

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](#)



The screenshot shows the 'Edit Email Template' interface. It includes fields for Name, Description, Category, and Subject. The Name field contains 'Invite members to login and access benefits', and the Description field contains 'Share information with your members about the benefits available'. The Category is set to 'Other'. The Subject field contains 'Login to Access Member Only Benefits with {{ TENODisplayName }}'. Below these fields is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, link, and list. The template text area contains the following content:

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!

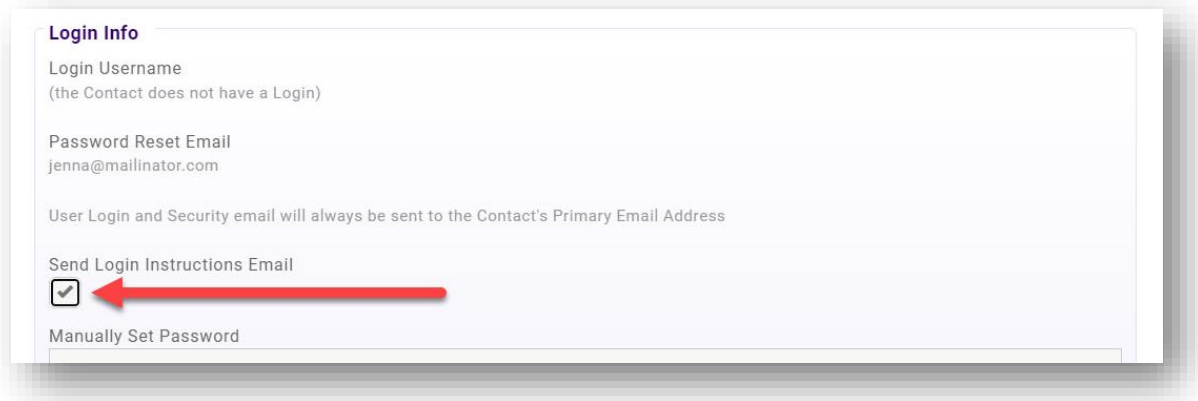
[Create your login here](#)

[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 "members only" hub.
- Personalized member listing page - included in the directory is your own information page on the website which can include a description area, location, logo, photos and contact details based on your membership level.
- Resources- being part of our association includes access to key sites, documents and other information to help you thrive in our community. Check out the resource area to learn more.

## 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.




**Login Info**

Login Username  
(the Contact does not have a Login)

Password Reset Email  
jenna@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

WIKI: [Setting up Individual's Info Hub Access](#)

**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](#)

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

WIKI: [Impersonate a Member in the Info Hub](#)

## 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](#)

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

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?



## **Customer Service Hours:**

Monday-Friday: 8am to 5pm (Central)

[GZSupport@growthzone.com](mailto: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](#)