

User Management

User Management includes the ability to add new users to the dashboard, resend invitations, delete users, and give users permission to see data such as the SEL list.

User Management is only available to dashboard administrators and any staff who have specifically been given permission to manage dashboard users.

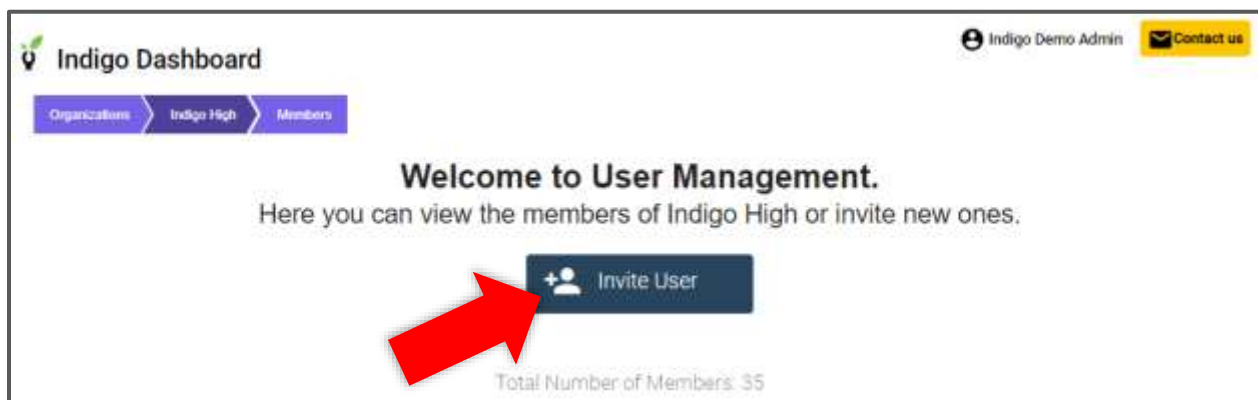
Video tutorial for User Management: <https://vimeo.com/360886894>

Add a New User

Log into the dashboard and click on the **User-Management** tile.



This is the **User Management** page. Click on the **Invite User** button at the top of the page to add a new user.



You will be taken to a new screen with space to enter an email, name, and permissions.

Welcome to the invitation page.
Invite new people to Indigo High

Email *

name *

This person can manage users and resources.

This person can view the SEL support list.

This person can view and edit ALL private groups, and view archived reports.

Send Invitation

Email: Enter the user’s email. This is the email the dashboard invitation will be sent to and will become the user’s login name.

Name: Enter the user’s name.

Permissions: There are 3 optional permissions listed on the right.

If you do not select any of the checkboxes, the user will have access to basic dashboard functions; they will be unable to see the SEL List or add/edit/delete users.

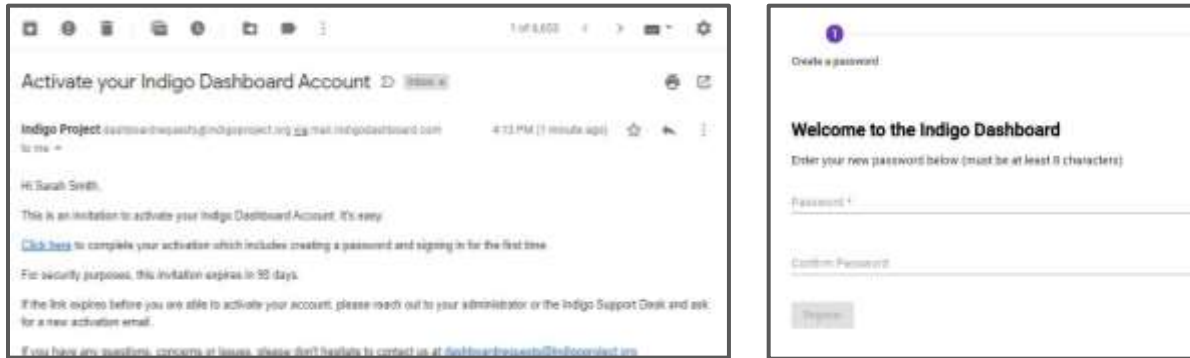
Checking “This person can manage users and resources.” gives the user access to the User-Management tile, which includes the ability to add and delete other users and update current user permissions and information. It also allows users to add new resources to the dashboard. Typically, this permission is only given to dashboard administrators.

Checking “This person can view the SEL support list.” gives the user access to the SEL List, which is the list of students who could use additional social-emotional support. Typically, counsellors are given access to this tile.

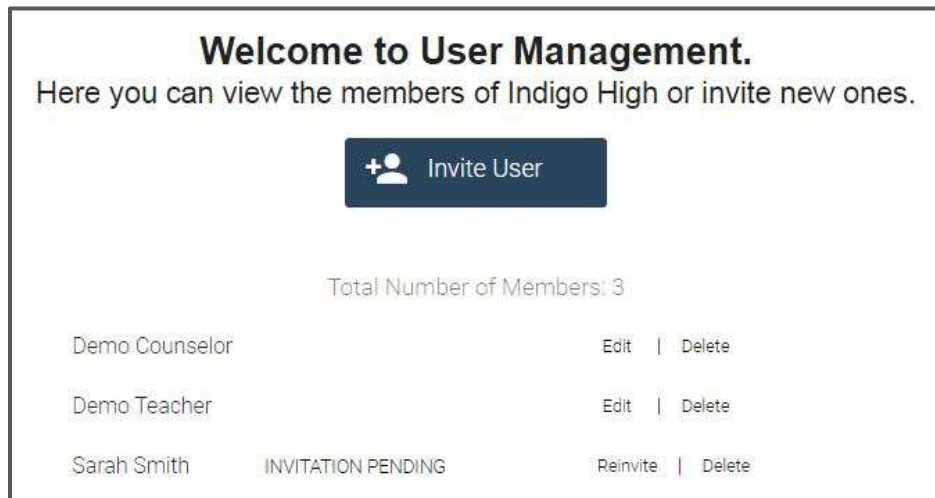
Checking “This person can view and edit ALL private groups, and view archived reports.” gives the user access to view every group created in the dashboard, private or public, and allows them to view archived reports, such as those of people who have left the organization.

Confirm that the email, name, and permissions are correct. Then click the **Send Invitation** button.

The user will receive an email invitation with a link to create a password and get access to the dashboard.

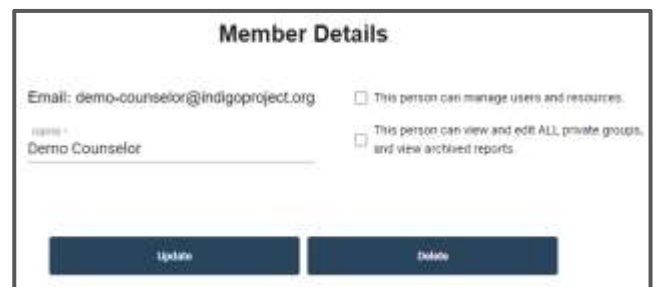


You can see the status of each user in the user list in the **User-Management** tile.



If a user has not yet activated their account, it will say "Invitation Pending" next to their name. If necessary, you can resend their invitation by clicking **Reinvite**. If you would like to delete the user, click **Delete**. Once you delete a user, they will no longer be able to activate their account through the email invitation they were sent.

Once a user has activated their account, you will have the option to **Edit** or **Delete** the user by clicking the appropriate button to the right of their name. By clicking **Edit**, you can update the user's name and permissions. After making changes, click the **Update** button. Or, remove a user's access completely by deleting them.



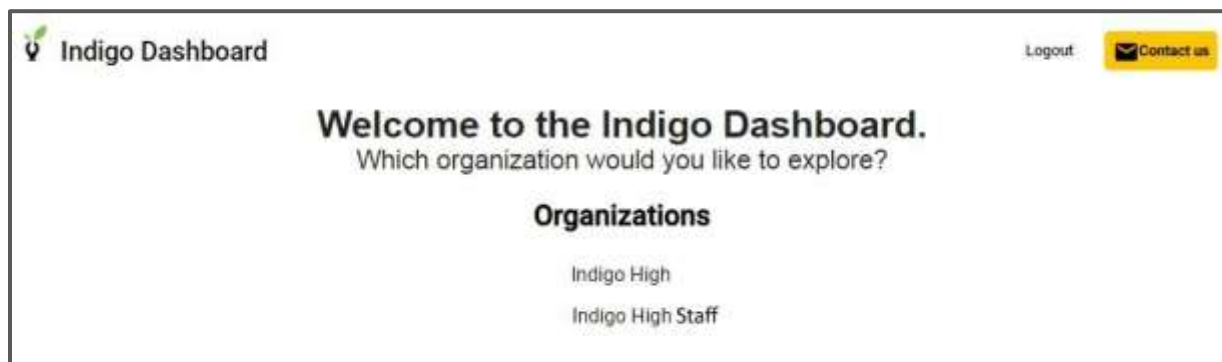
Add a New User to the Staff Dashboard

You must have access to the staff dashboard to add other users to it.

Go to the **Organizations** screen (the first screen you see when you enter the dashboard). Open the staff dashboard and click the **User-Management** tile.

Add the new user in the same way as you would in the student dashboard, making sure to select appropriate permissions.

If a user has already activated their account, they will see the **Organizations** screen the next time they log into the dashboard. This will give them the option to enter either the staff or the student dashboard.



If you have questions or need anything additional, please contact us at support@indigoproject.org