Onboarding a New Admin

- **Admin rights**: Decide what Admin rights the new hire will need.
  
  - If an admin already has an alumni account or donor account, create a separate (Admin) account with the appropriate admin rights to ensure an easier clean-up if the admin leaves. This way the alumni or donor account maintains the transactional data, and the admin account only has a record of admin transactions. This also assists in the use of the Pre-Populate functionality for Forms, Events, Donations, and Memberships for admins.
  
  
  - **Approvals**: Let your new hire know if they need your approval (events/emails) prior to publishing or sending.
    - Define Urgent, Expedited, and Regular help requests.
    - Have templates ready to use for Email Marketing, Events, and Forms.
    - Add any information to an Admin Info page in your site that you think a new hire needs to access concerning the site design, style guidelines, and image sizes.

- **Optional**: Let iModules know there is a new employee that needs the newsletters and iModules communications.

- **Optional**: Create an iModules agreement that the new hire must sign and maintain the document in their file.
  - Explains what is expected and what happens if expectations aren’t followed.
  - Signed by both employer and employer’s manager/supervisor.
  - Can be kept in your files of HR files.
  - Require the completion of training prior to receiving admin rights.

- **Optional**: Let your iModules representative know if you would like your new hire added to a sandbox for practice, if needed.
New Admin Training

Each module has its own section in the Support Center with step by step documentation and videos.

General Overview

- What is Encompass? Encompass Overview Video (first link) and all other video tutorials on the Support Center: https://support.imodules.com/hc/en-us/articles/218801997-Video-Tutorials.
- Provide an explanation of what your organization uses Encompass for and specifically what the new hire will be working with.
  - How do our classes, clubs, and groups use Encompass?
  - Explain the difference between the Encompass site and the .edu, or primary site, and when to use each.
  - Explain how Encompass works with the back-end database, where incremental updates are processed, and who is the primary contact for working with the member profile.

**All Modulars referenced in this section can be registered for to be attended live with an iModules trainer, or be watched on-demand on the Recorded Modulars page here:** https://clients.imodules.com/s/1333/18/ip2.aspx?sid=1333&gid=3&pgid=3322.

Content Management

- Stress the importance of using Mobile Ready Content Blocks and *NO TABLES*.
- When working with images within Encompass, make sure photos are cropped and resized prior to uploading.
Email Marketing


Forms


Events

- Choosing the type of event to create: [https://support.imodules.com/hc/en-us/articles/218262028-Choosing-the-Type-of-Event-to-Create](https://support.imodules.com/hc/en-us/articles/218262028-Choosing-the-Type-of-Event-to-Create).

Donations

  - Suggested Video: Managing Existing Donation Campaigns video tutorial #212.
  - Suggested Video: Recurring Payments tool #209.
Data Management

- Data Management Training Modulars:


Membership


Additional Resources

- iModules Client Networking Group on Facebook: https://www.facebook.com/groups/156332774433476/
- PCI Compliance: https://support.imodules.com/hc/en-us/articles/218802397-PCI-Compliance
- GDPR (General Data Protection Regulation): https://support.imodules.com/hc/en-us/sections/360000104791-GDPR-General-Data-Protection-Regulation

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