Welcome to Tyze

Quick Start Guide for Administrators

August 2020

Welcome. This guide is designed to help Tyze administrators get up and running. You'll learn to:

- Set up your organization's Tyze engagement strategy
- Get organized and ready to launch
- Use the new administrator portal to invite people to start their own networks, plan events on the calendar, share your organization's files, review invitation metrics, and manage your account.

This guide will walk you through steps involved in planning your Tyze launch as well as the administrator portal functionality, but if you still have questions, please contact us at feedback@tyze.com.

Step 1 Set Up Your Engagement Strategy

Introducing any new technology requires careful planning. In this guide, we walk you through the steps required to get your organization's Tyze site up and running successfully.

An effective engagement strategy:

- Positions you for success
- Focuses on your high level goals
- Examines how you will engage people to become active in their networks

Things to Consider…	Examples…
What is the main reason our organization is using Tyze?	Refer to your Tyze Implementation Readiness document that was used to set up your Tyze site. This will provide insight into your organization's overall purpose for using Tyze. Understanding the value that Tyze brings to your users will help you develop an effective engagement strategy.
How do we want our members to use Tyze and why?	The expected frequency of your members' use of Tyze will impact your engagement strategy. Tyze users who depend on Tyze for organizing daily assistance or keeping up with important research or legislative updates will need a different engagement outreach level than members with episodic Tyze usage. Your engagement strategy will need to include an approach for both types of users.
How will we engage people?	Some organizations use their newsletters, important announcements, events and more through Tyze as a way to further engage network users within the tool. You can even schedule these events in your Tyze calendar.
How will we measure progress and success?	Decide if you measure success by the number of networks created, the total number of users, participation levels, reported satisfaction or some other benchmark within your organization.

Step 2 Organize Your Information and Prepare for Launch

Now that you've created your engagement strategy, it's time to organize the information you intend to share with your networks. Below are some ideas for the types of information it will be beneficial to share with your network users.

Things to Consider…	Examples…
Align with existing programs where possible	Tyze is a great enhancement to initiatives that are already in place. For example, use Tyze to distribute newsletters or as a communication tool to keep small groups in touch after they've attended events.
Review our library of educational articles, all of which are available to you to share with your networks.	Tyze Quick Start Guide for Network Users, is a good resources for helping users to understand and use Tyze. Add other articles and other resources you may want to share with your network.
What information will be of value to share?	Examples: newsletters, announcements, events, educational pieces, surveys, research studies, legislative updates, holiday reminders. Once you've determined what you want to share, organize it in a folder on your computer so it's ready to upload to Tyze for sharing.
When will we share that information?	Create a schedule outlining when you'll share information with network members via Tyze. Add key dates to your own Tyze calendar as triggers to share information with your networks. We have found it best not to overwhelm new network members with a lot of information in the beginning. Send small bits of useful content on a regular basis. Decide if you prefer to share information on a weekly basis, bi-weekly or monthly basis.

As you are gathering your materials, consider how you would categorize the information for easy retrieval in Tyze by your users. For example, some of your materials may relate to caregiving or finances or research updates. Each of those would be effective categories. Later in this document we'll explain exactly how to upload the content you have gathered and categorized.

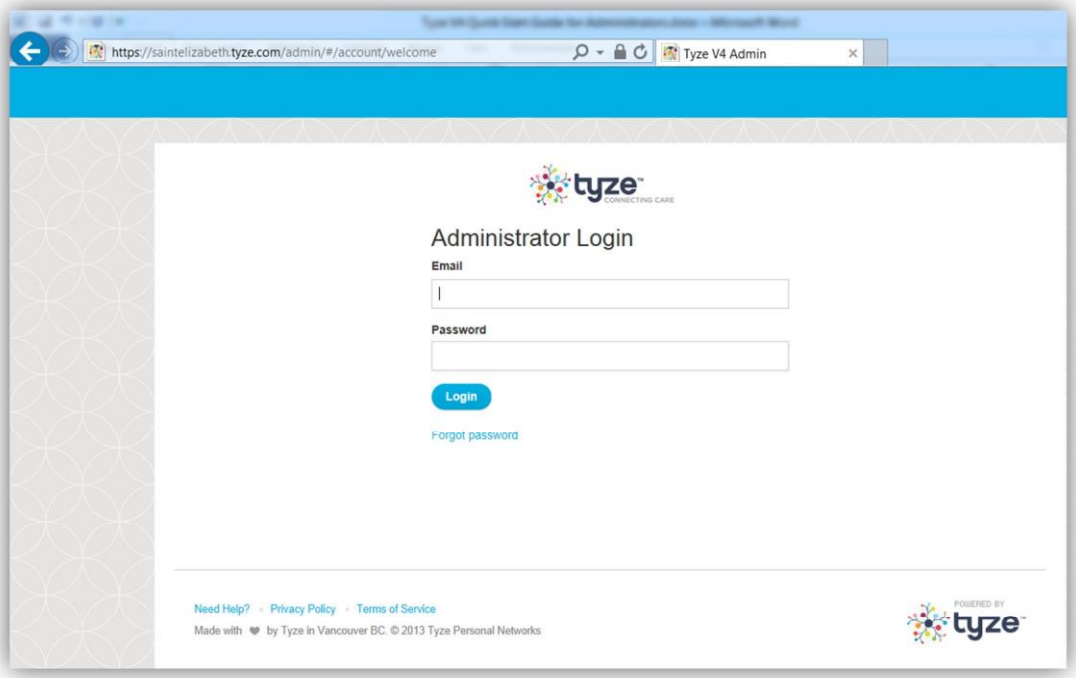
Organizing Your Files

Here's a suggested format for organizing the content you plan to upload into Tyze. This will make the uploading process even easier for you.

	A	B	C	D	E	F
1	**Item Description**	**File Name**	**Format**	**Category**	**Audience**	**Source**
2	Caregiver Compass	Caregiver-Compass-Online.pdf	PDF	Caregiving	All networks	Saint Elizabeth
3	Christabel's Casestudy	christabelcasestudy.pdf	PDF	Tyze Education	All networks	Saint Elizabeth
4	Tyze Quick Start Guide for Network Users	Tyze Quick Start Guide for Network Users	PDF	Tyze Education	All networks	Saint Elizabeth
5	Caregiving Resources - Website Links	caregiver links.docx	MS Word Document	Caregiving	All networks	Saint Elizabeth
6						

Step 3 Accessing Your Admin Portal

As an administrator, you have access to the Tyze Admin Portal. This is where you'll invite people to start networks, upload and share files, monitor network statistics and manage your own account.



Your Tyze account manager will provide you with your branded URL for Tyze. This is the URL your sponsored network users will use to access their networks.

Your Admin Portal is accessed by adding /admin to the end of your organization's branded Tyze URL.

Sponsor Organization	Member Network URL	Admin Portal URL
Saint Elizabeth Health Care	https://saintelizabeth.tyze.com	https://saintelizabeth.tyze.com/admin
"Your Branded Name"	https://yourbrandedname.tyze.com	https://yourbrandedname.tyze.com/admin

Credentials

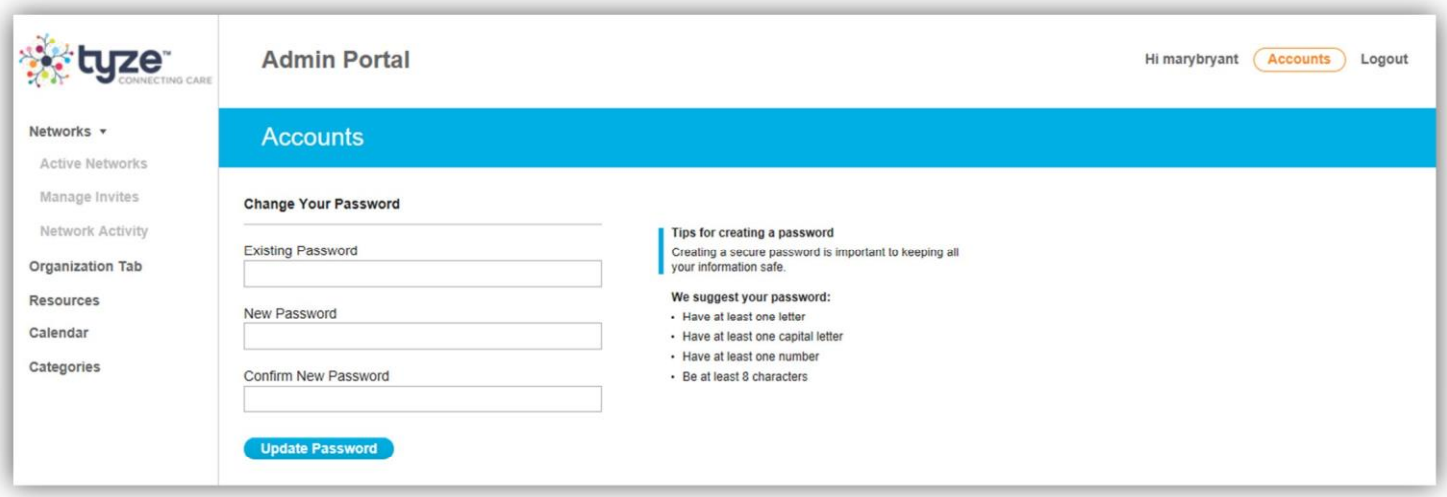
Only users designated by your organization as "Tyze administrators" will be able to successfully login to the administrator portal. Users designated as "Tyze administrators" use their email address and a password they create as their login credentials. An organization may have more than one person designated as administrator.

Set a Bookmark!

We recommend you create a bookmark for your Admin Portal site for easy future access.

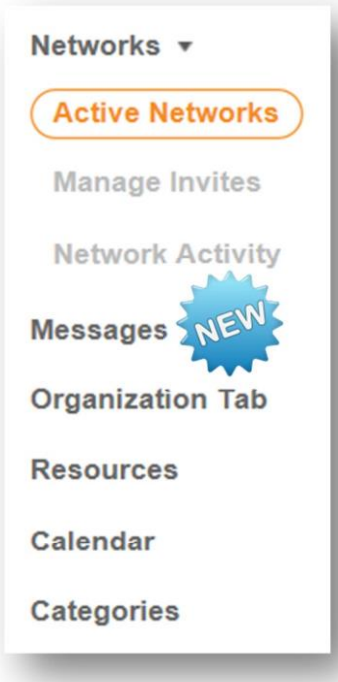
Now let's learn how to use the Admin Portal to start your organization's Tyze experience. The remainder of this guide will focus on the following quick start process. This is the recommended order for getting your Tyze site ready to launch.

Step 4 Navigating the Admin Portal



The Admin Portal now uses a left side navigation menu for accessing the feature functionality on the site. Administative functionality such as resetting your password and logging out is done using a small menu in the upper right corner of the portal.

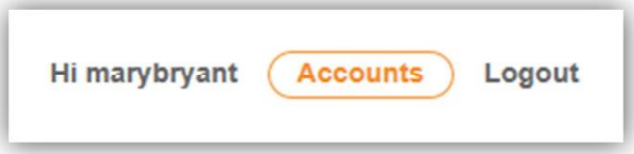
Left Side Naviation Menu



- Click a menu item to access that page
- Click the arrow to expand or minimize the Networks menu

Top Right Administrative Menu

- Click Accounts to access Password Reset functionality (see above)
- Click Logout to logout of the Admin Portal



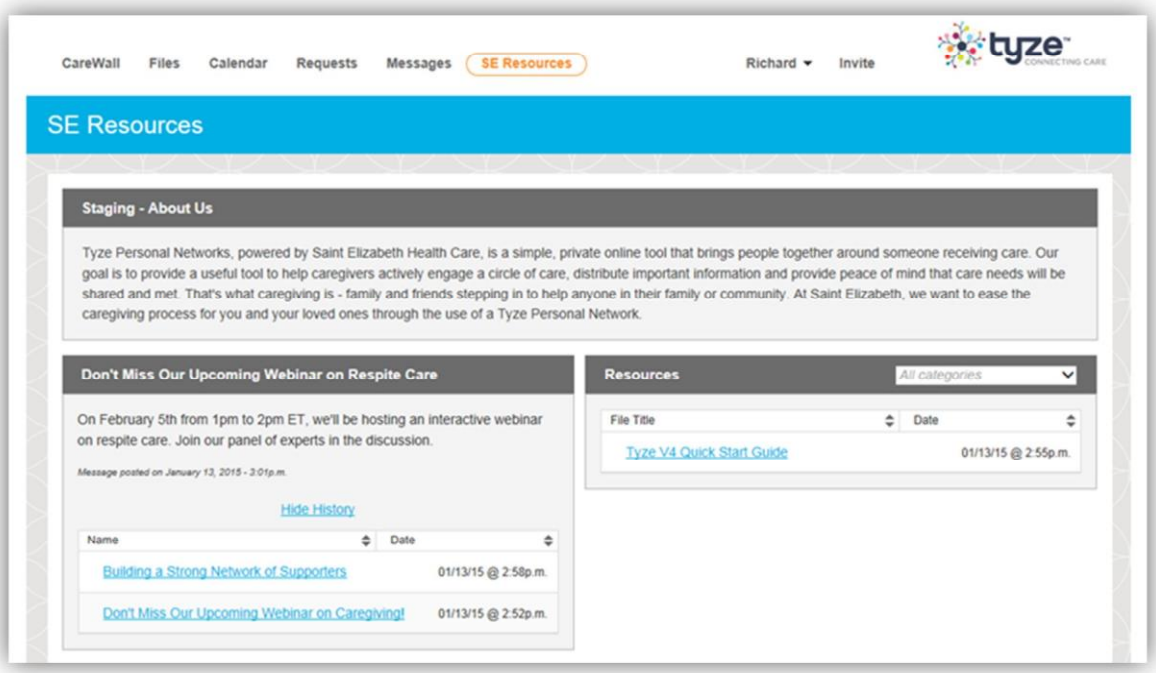
Step 5 Set Organization Tab Name

Once you have successfully logged in to your Admin Portal, the first thing you want to do is populate your Organization Tab. Do this before inviting anyone to create a network because it's the information your member networks will see about your organization in their own network.

Organization Tab

Your customized organization tab name will be displayed on the top navigation bar for each network. When a client clicks this custom name you have created, they will be able to access all the content you have decided to share with their network. Adding an organization description will provide your networks with more information about your organization. Simply enter your customized Organization tab name and description like in the example and click "Submit".

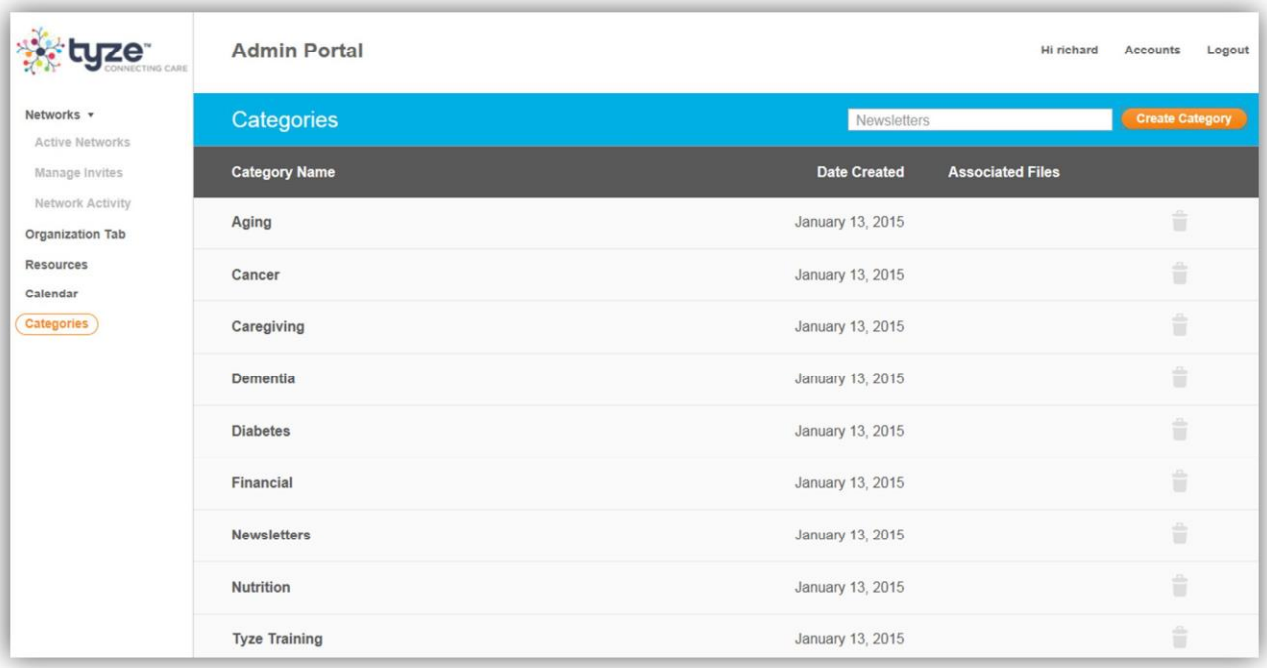
Sample End User View of OrganizationTab



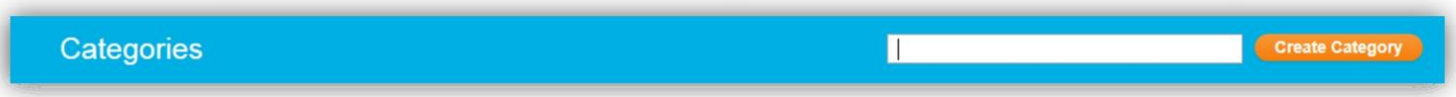
To the left is an example of what your network users would see when clicking on your customized Organization tab including your organization description, any messages you have shared and any files or content you have chosen to share with networks.

Step 6 Create Categories for the Resources You Want to Share

Categories make it easy for your network users to find your content. When you are gathering the resources/files you want to share with your networks, think of how you want to tag each file for easy access.



One file might fit multiple categories. For example, you may have a category called "Newsletters" where you upload your organization newsletters. You may also have a category called "Financial". If one of your newsletters focused on financial planning information, you would tag that newsletter with the "Newsletters" category and the "Financial" category. Categories are simply a way to keep your content organized and easily accessible for you and your sponsored networks.

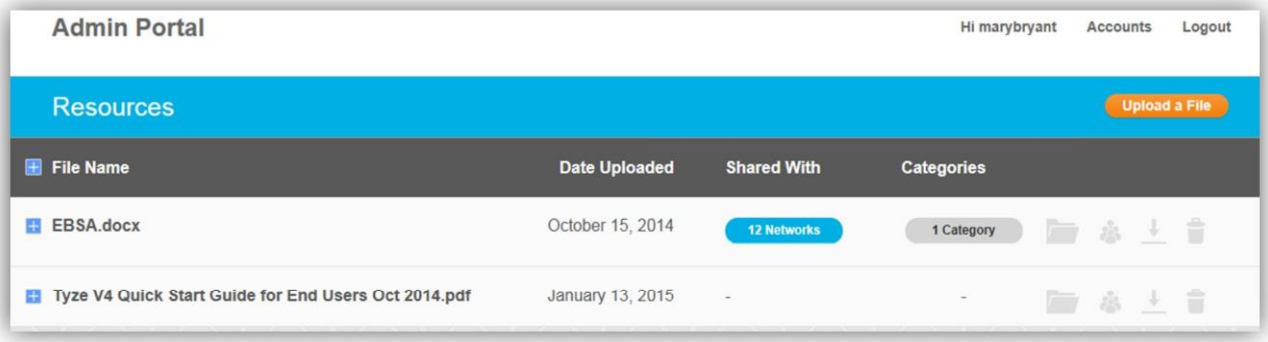


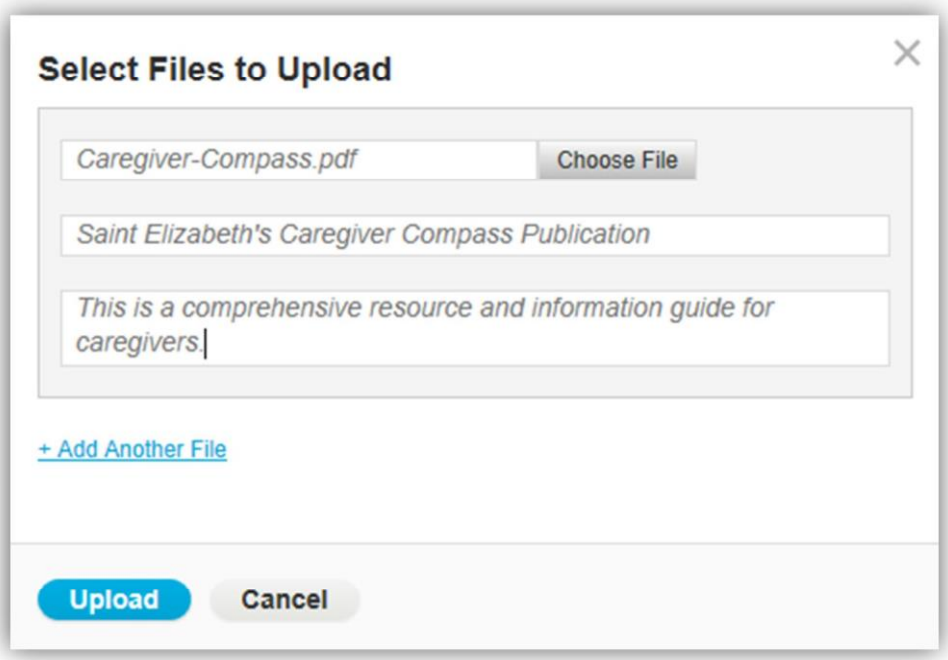
- Type the category name and click Create Category.
- Your category will now display in your alphabetized Category List

This is where your content spreadsheet you created in Step 2 will come in very handy.

Step 7 Upload Your Resources for Sharing with Networks

Resources...Now that you have your categories created for tagging your organization content, it's time to upload your resources/files, categorize them and share them with the networks you invite users to create.





Uploading a File

- Click the Resources tab
- Click "Upload Files"
- Click "Choose File"
- Select the file and click "Open"
- Enter user-friendly title
- Enter a helpful description

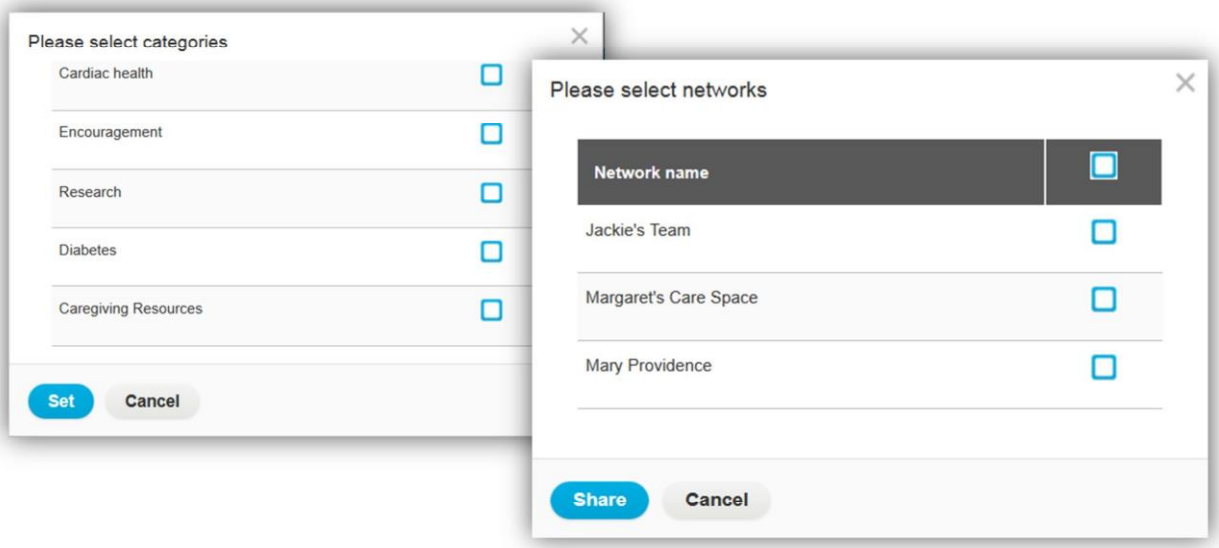
Once a file is uploaded, it will be displayed in the list of uploaded files. Click the blue + sign in front of the file name to view the user-friendly file title and description.

Now it's time to categorize and share the file you uploaded.

At the end of each file row there are 4 action icons. As you mouse over each icon, the icon name will be displayed. In order of appearance left to right, the icons represent: Categories, Share, Download, Delete

Setting the Category

Click the file folder icon for "Categories" in the Actions column to associate one or more categories with your uploaded file and then click "Set".



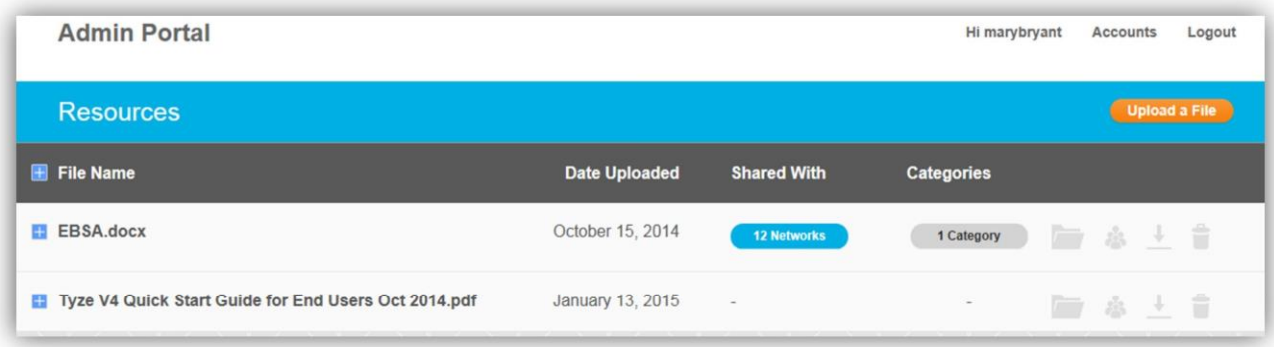
Sharing

To share your file with a network or multiple networks, click the 'Share' icon and then select one or more networks.

TIP: To make a resource automatically shared with any future networks created, click the top checkbox.

Reviewing/Editing Status of Uploaded Resources

Once you have uploaded a resource, you will be returned to the main resources display page.



Click the blue Network button in the Shared With column to see the list of networks you have already shared a resource with. In this example, you have shared the resource with 3 networks.

Click the gray Category button to see the categories you used to tag the resource. In this example, the resource has only been tagged in one category.

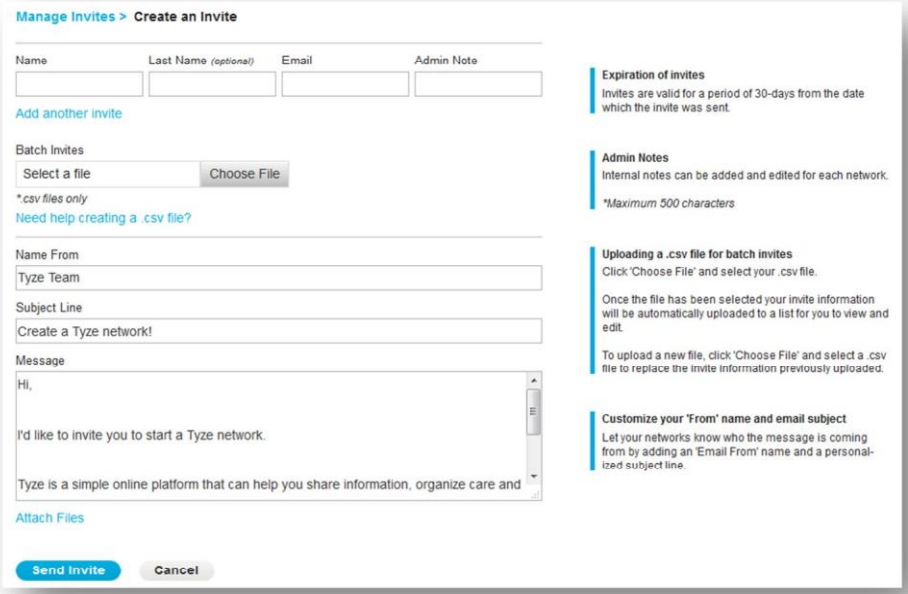
Congratulations! Now you are ready to start inviting users to create networks!

Step 8 Invite Members to Start Their Own Tyze Networks

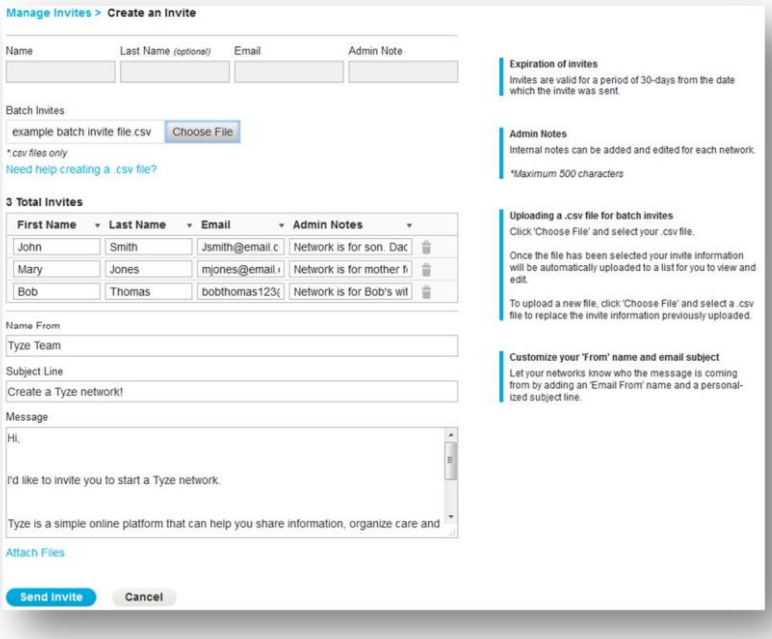
Manage Invites…Click the arrow to expand the Network menu and select Manage Invites. This page displays all the network invitations previously sent and their status. Click Create an Invite to create an invitation for an individual to create a network or use the batch invite feature to invite up to 1,000 users at once.

Sending a Single Invitation

- Click the Manage Invites tab then click Create an Invite
- Enter the client's name and email
- Enter internal admin notes about the network when filling out invite
- Customize the "Name From" so the email appears to come from your organization instead of Tyze.
- Customize the "Subject Line"
- Use the existing invite message or customize your own message
- Attach a file if you want to
- Then simply click Send Invite to send your invitation.

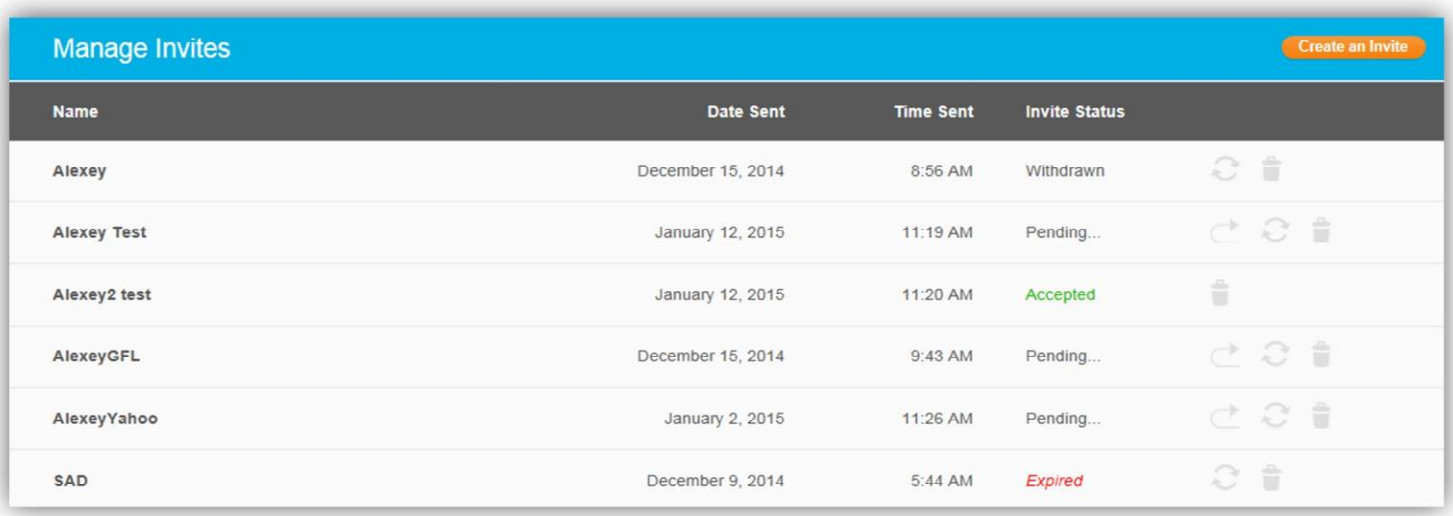


Sending Bulk Invitations



- Click the Manage Invites tab then click the Create an Invite button.
- Click “Choose File” to upload your csv file
- Or click the “Need help creating a csv file” link
- Your imported names will be displayed
- Customize the “Name From”
- Customize the “Subject Line”
- Use existing message or customize your own
- Attach a file if you want to
- Then simply click Send to send your invitation

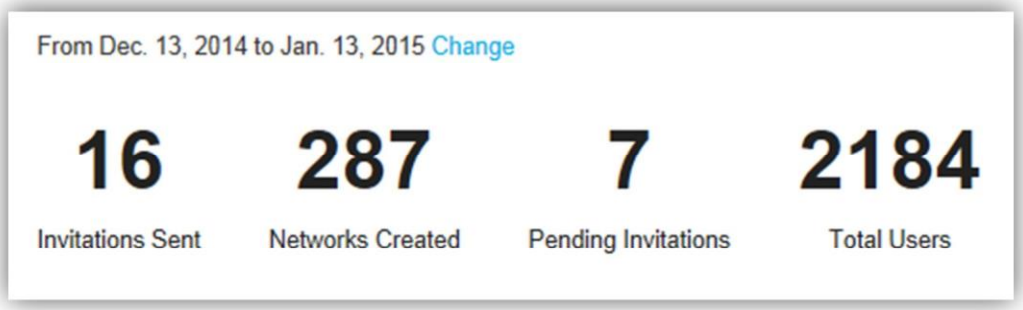
Once returned to the main Manage Invites page, you can review which invitations are pending and which have been accepted. Click one of the 3 action item icons to withdraw, resend or delete an invitation if needed.



Review Active Networks and Admin Notes

Now that you have sent invitations and networks are being created by your users, use the Active Networks tab to review networks created. You can also view any internal admin notes entered about the networks during the invitation phase, edit any existing admin notes or add helpful notes about the networks displayed. These add notes are for your information and only display on your admin portal.

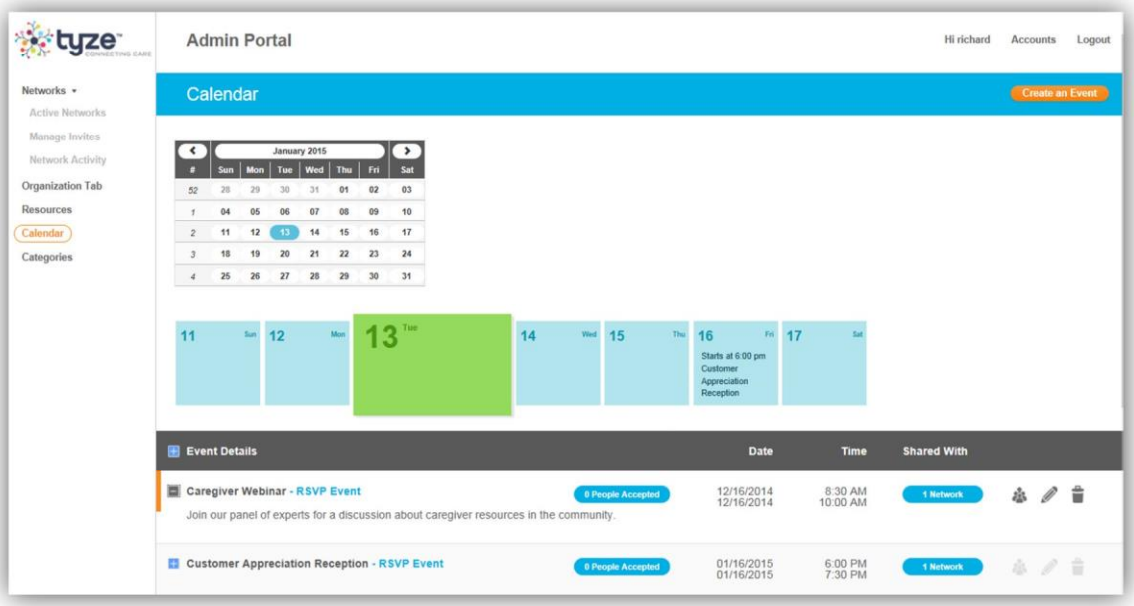
Click the Add/Edit Admin Note icon on the active network’s row to enter useful notes for identifying that network.



Review Network Activity

Want to know how many of your invitations are resulting in new networks being created? Check your Network Activity tab to review your metrics.

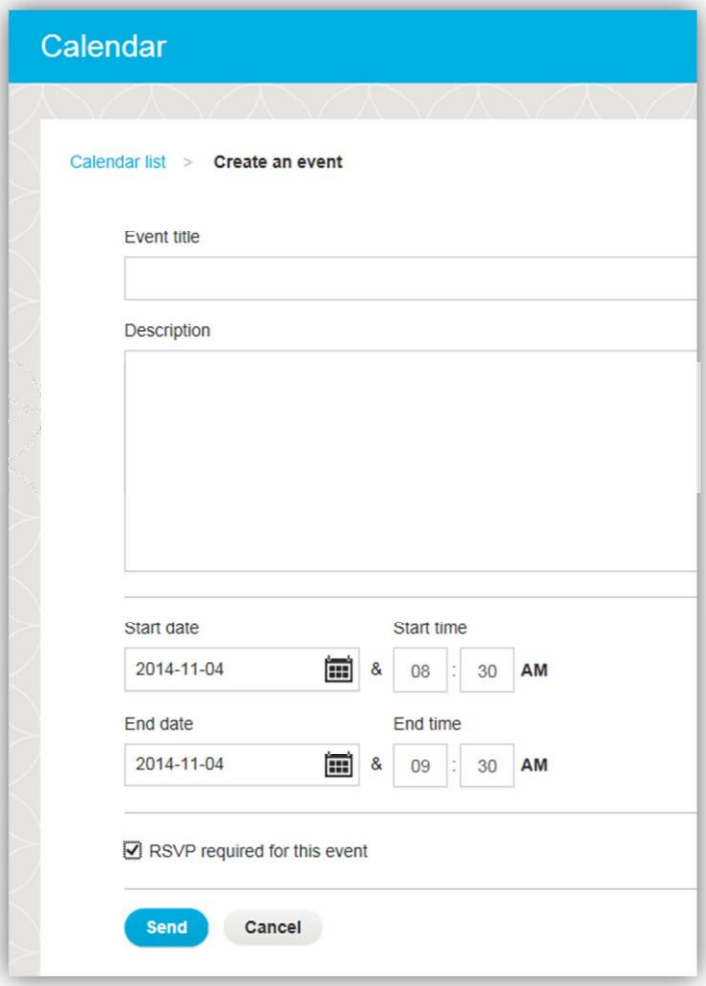
Step 9 Use the Calendar to Plan Events/User Engagement



Calendar…You can create events in your calendar and share them with your organization's networks. This is a quick and easy way to let networks know about the social events, workshops, webinars, or information sessions available to them. You can share an event with one specific network or many networks.

Note: network members cannot communicate with you through these calendar postings.

Creating an Event



- From the Calendar, click “Create an Event”
- Enter a title
- Enter a description
- Set your start and end date
- Optional - Set up an RSVP to track acceptance
- Then click Send—you’re done!

Members who get your invitation will get an email notification and can provide you with an RSVP on their expected attendance.

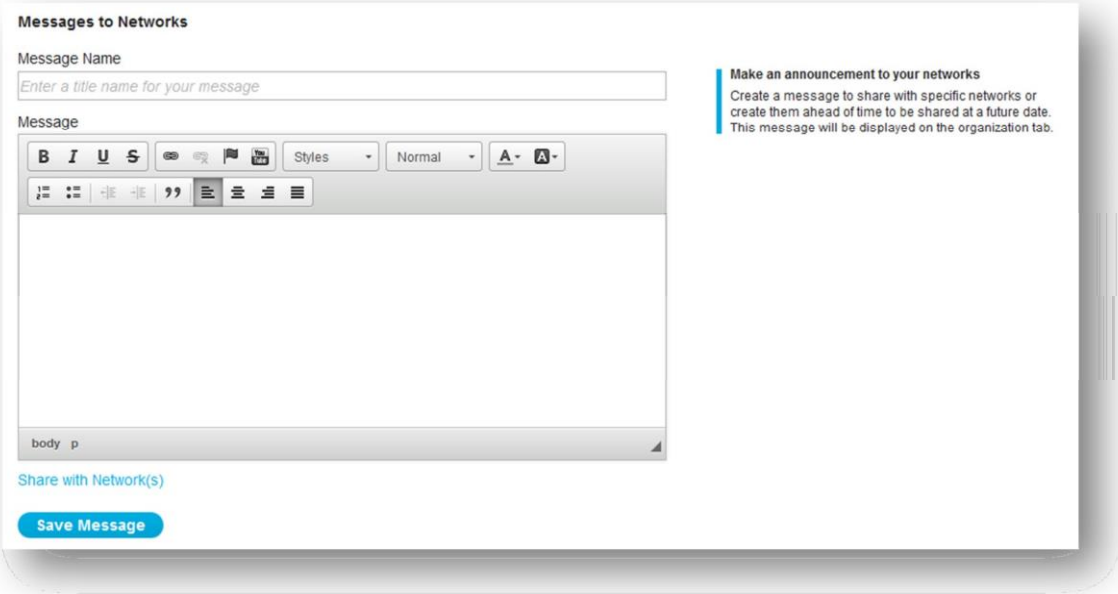
Step 10

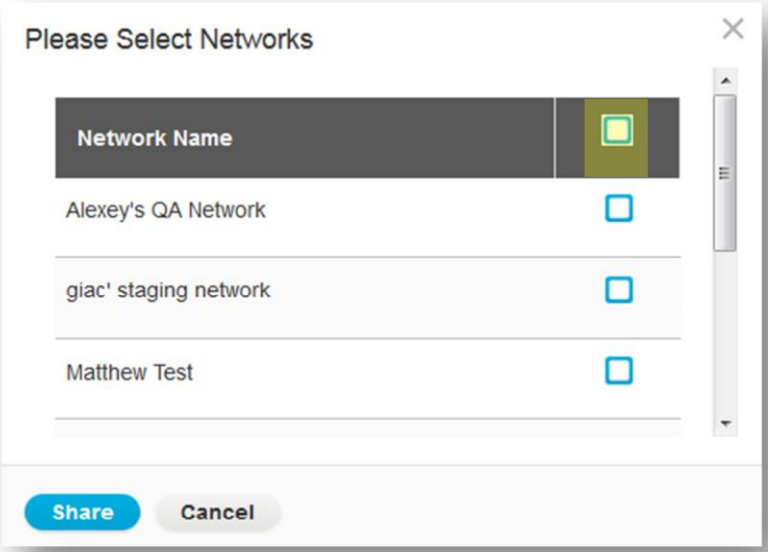
Communicating with Networks Using Admin Messages

Once you have networks created by your users, use Tyze's messaging functionality to send a message to all your networks at once. This messaging feature is found on the Organization tab and works much like a blog. You enter a title for your message, type your message and share it with all of your networks or a select few. Messages can include up to 10,000 characters and may now be formatted for enhanced emphasis and include clickable links to websites, video links, etc.

To enter a link to a website, click the link icon.

To enter a link to a YouTube video, click the YouTube icon.





To share your message right away:

- Click "Share with Networks"
- Select the networks to receive the message
- Click Share to send the message.

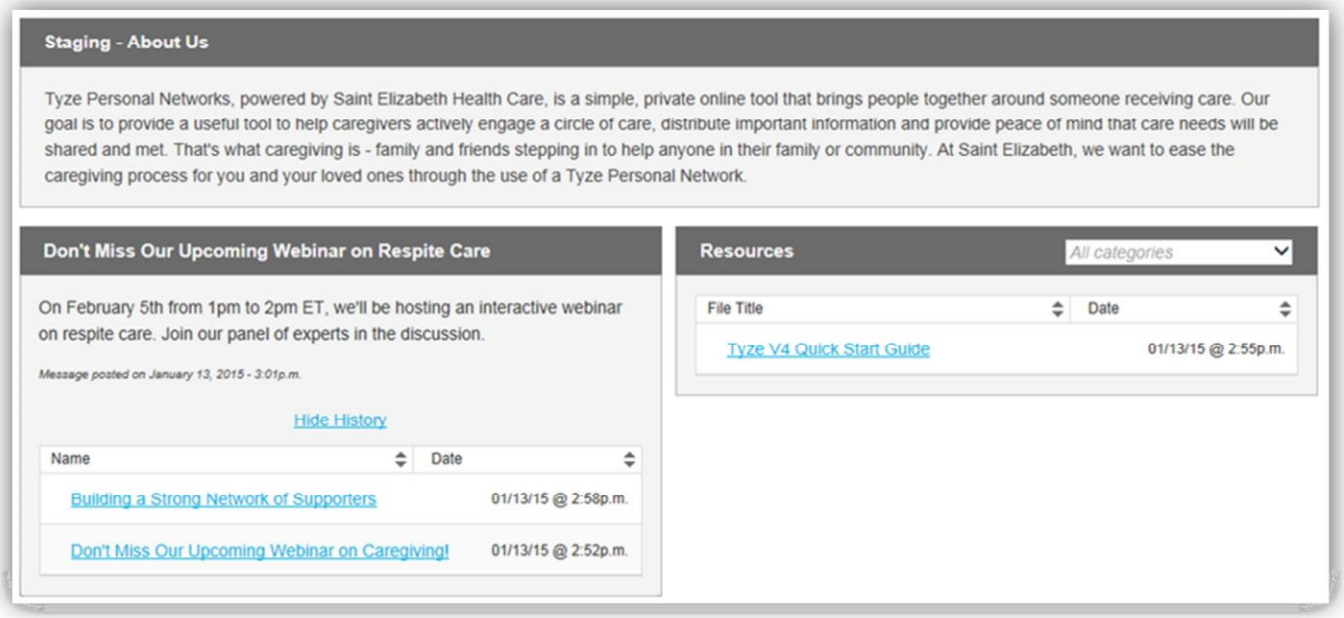
You can see who you shared the message with as well as when you shared the message. See the screen shot below.

To automatically share your message with any new networks created in the future, be sure to check the top box (shown here highlighted in yellow).

Note: If you want to create your message now but share it later, just click Save Message. This helps you batch the creation of your future engagement items for your networks and share them as appropriate.

What Will Your Networks See When You Send a Message?

Each network user will receive an email when a message has been shared by their organization. The email will contain a link to the message so they can login to view your important announcement. Here's an example of what your networks will see on their Tyze portal when you broadcast a message. The latest message will show by default on their Organization page, and they have an option to show or hide the list of previously received messages.



Please continue to the next page for a review of recent updates to this functionality designed to allow you to increase your engagement with your networks.

Enhanced Organization Messaging Features

Organizations now have two expanded messaging features to offer network users. The new functionality is configurable, and the default setting is OFF to give organizations the opportunity to learn about the functionality before releasing it to network users.

- Allow network users to reply directly to announcements/messages posted by the organization administrator.
- Allow network users to initiate a message directly to the organization administrator, independent of an organization message

*Important note: Until organizations choose to turn this functionality ON, end users are not aware of the functionality. However, once the functionality is turned ON, network users will receive an email alerting them of the new feature and will see the ability to initiate messages to the organization administrator. An email to network users is also generated if the functionality is turned off. Turning ON the New Messaging Functionality

Click the Messages tab and toggle the Network Messages button to ON by clicking the word ON. The screenshot below shows how the Messaging switch looks in the ON position.

- How is an organization administrator notified when a network user replies to a message?

Usage Tips for Managing Messages from Network Users

- Administrator will receive an email notification with a link to the message ○ New message will appear on the administrative portal Messages tab with a blue dot indicating new message

- What happens when a network user initiates a message to the organization administrator?
  - Administrator will receive an email notification with a link to the message ○ New message will appear on the administrative portal Messages tab with a blue dot indicating new message
- Click anywhere on a message row to open that specific message
- If you already have one message row open, clicking on another message row will close the previously opened message and open the message you just clicked.
- To reply to a message, type your reply and click the blue envelope icon to send
- Click the X icon to close a message (or just click into another message)
- Click the trash can icon delete a message
- Can I search for specific messages?
  - Yes, you can search for messages from specific network users or specific networks.
- How do I search for messages?
  - Type a username or network name in the search bar and click the magnifying glass to search for matches?
- My search didn't return any results. How do I clear my search and get all the messages back?
  - Highlight and delete your search criteria and click the magnifying glass to return to all messages view