

# 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](mailto: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	<b>Item Description</b>	<b>File Name</b>	<b>Format</b>	<b>Category</b>	<b>Audience</b>	<b>Source</b>
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						

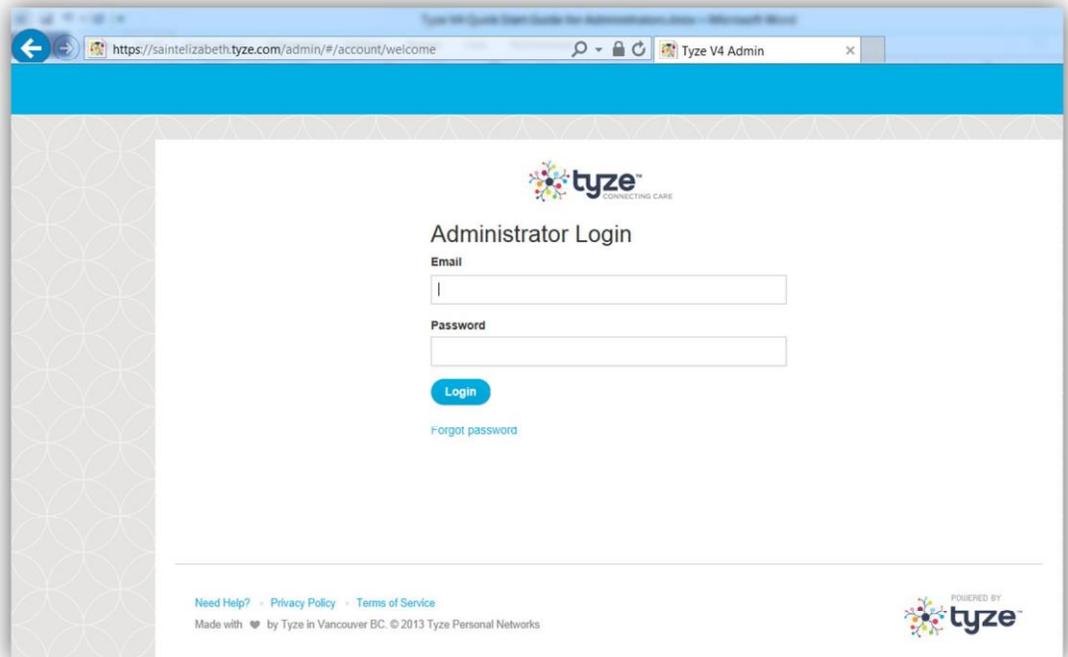
## Step 3

# 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	<a href="https://saintelizabeth.tyze.com">https://saintelizabeth.tyze.com</a>	<a href="https://saintelizabeth.tyze.com/admin">https://saintelizabeth.tyze.com/admin</a>
"Your Branded Name"	<a href="https://yourbrandedname.tyze.com">https://yourbrandedname.tyze.com</a>	<a href="https://yourbrandedname.tyze.com/admin">https://yourbrandedname.tyze.com/admin</a>

## 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!

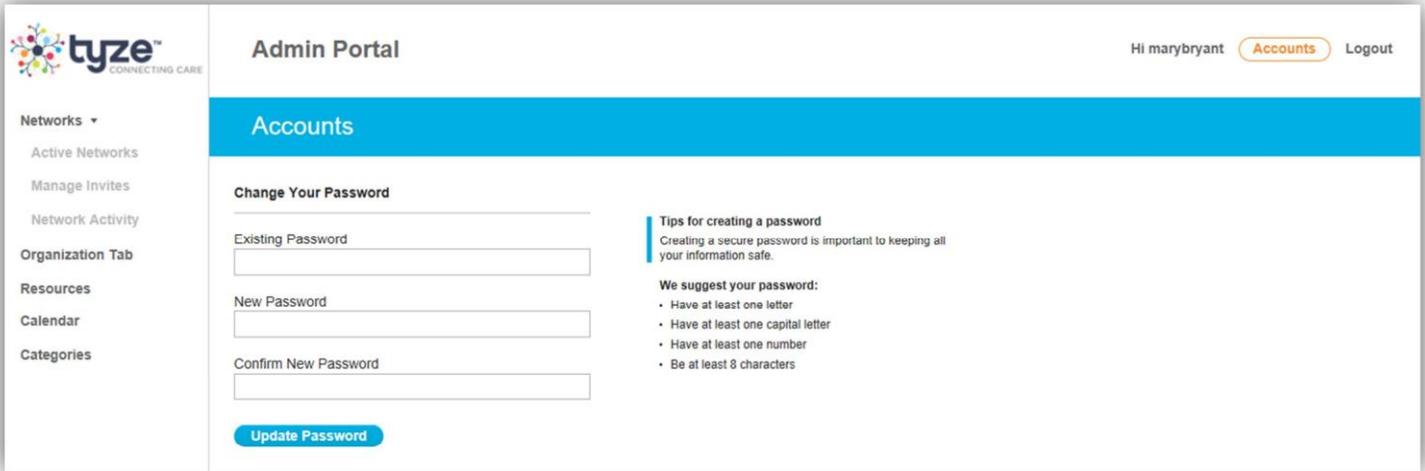
We recommend you create a bookmark for your Admin Portal site for easy future access.

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.



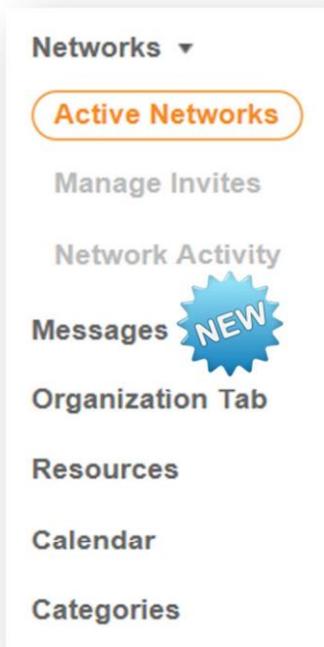
## Step 4

# Navigating the Admin Portal



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

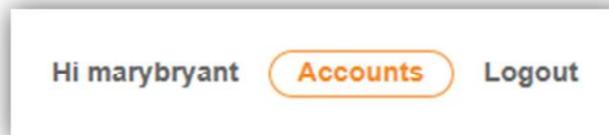
## Left Side Navigation Menu



- 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".

**Customize Organization Tab**

Organization Tab Name  
SE Resources

Organization Description  
Tyze Personal Networks, powered by Saint Elizabeth Health Care, is a simple, private online tool that brings people together around someone receiving care. Our goal is to provide a useful tool to help caregivers actively engage a circle of care, distribute important information and provide peace of mind that care needs will be shared and met. That's what caregiving is - family and friends stepping in to help anyone in their family or community. At Saint Elizabeth,

**Submit**

## Sample End User View of OrganizationTab

CareWall Files Calendar Requests Messages **SE Resources** Richard Invite 

### SE Resources

**Staging - About Us**

Tyze Personal Networks, powered by Saint Elizabeth Health Care, is a simple, private online tool that brings people together around someone receiving care. Our goal is to provide a useful tool to help caregivers actively engage a circle of care, distribute important information and provide peace of mind that care needs will be shared and met. That's what caregiving is - family and friends stepping in to help anyone in their family or community. At Saint Elizabeth, we want to ease the caregiving process for you and your loved ones through the use of a Tyze Personal Network.

**Don't Miss Our Upcoming Webinar on Respite Care**

On February 5th from 1pm to 2pm ET, we'll be hosting an interactive webinar on respite care. Join our panel of experts in the discussion.

Message posted on January 13, 2015 - 2:01p.m.

[Hide History](#)

Name	Date
<a href="#">Building a Strong Network of Supporters</a>	01/13/15 @ 2:58p.m.
<a href="#">Don't Miss Our Upcoming Webinar on Caregiving!</a>	01/13/15 @ 2:52p.m.

**Resources** All categories

File Title	Date
<a href="#">Tyze V4 Quick Start Guide</a>	01/13/15 @ 2:55p.m.

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.

**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.

The screenshot shows the Tyze Admin Portal interface. The top navigation bar includes the Tyze logo, 'Admin Portal', and user information 'Hi richard', 'Accounts', and 'Logout'. The left sidebar contains a menu with 'Categories' highlighted. The main content area features a blue header with 'Categories', a search input field containing 'Newsletters', and a 'Create Category' button. Below this is a table listing existing categories:

Category Name	Date Created	Associated Files
Aging	January 13, 2015	
Cancer	January 13, 2015	
Caregiving	January 13, 2015	
Dementia	January 13, 2015	
Diabetes	January 13, 2015	
Financial	January 13, 2015	
Newsletters	January 13, 2015	
Nutrition	January 13, 2015	
Tyze Training	January 13, 2015	

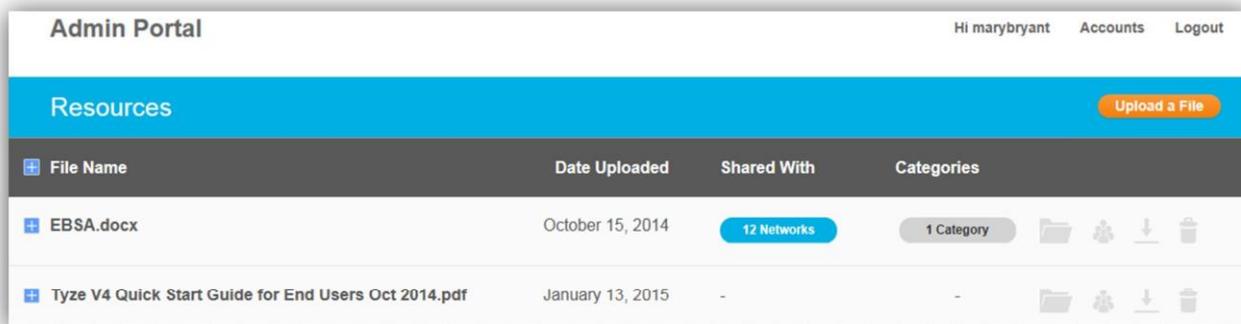
One file might fit multiple categories. For example, you may have a category called “Newsletters” where you upload your organization newsletters. You may also have a category called “Financial”. If one of your newsletters focused on financial planning information, you would tag that newsletter with the “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.

This close-up shows the 'Create Category' form. It consists of a blue header with the word 'Categories' on the left, a white search input field in the center, and an orange 'Create Category' button on the right.

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

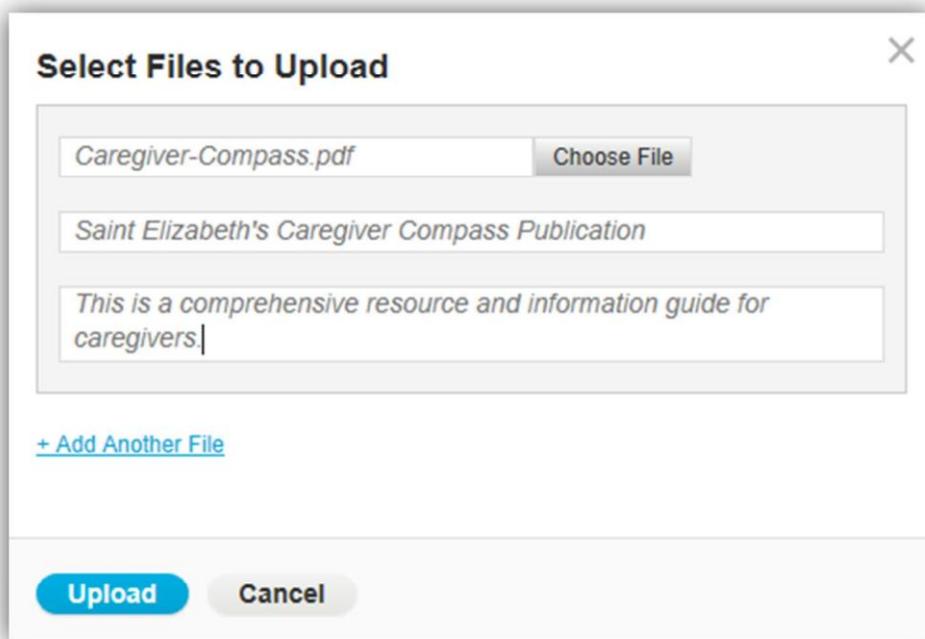
This is where your content spreadsheet you created in Step 2 will come in very handy.

**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.



The screenshot shows the Admin Portal interface. At the top, it says "Admin Portal" and "Hi marybryant Accounts Logout". Below that is a blue header for "Resources" with an "Upload a File" button. The main content is a table with columns: File Name, Date Uploaded, Shared With, and Categories. There are two rows of files listed.

File Name	Date Uploaded	Shared With	Categories
EBSA.docx	October 15, 2014	12 Networks	1 Category
Tyze V4 Quick Start Guide for End Users Oct 2014.pdf	January 13, 2015	-	-



The dialog box is titled "Select Files to Upload" and has a close button (X) in the top right. It contains a text input field with the filename "Caregiver-Compass.pdf" and a "Choose File" button. Below that is another text input field with the title "Saint Elizabeth's Caregiver Compass Publication" and a description field with the text "This is a comprehensive resource and information guide for caregivers." At the bottom left, there is a link "+ Add Another File". At the bottom, there are "Upload" and "Cancel" buttons.

### 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

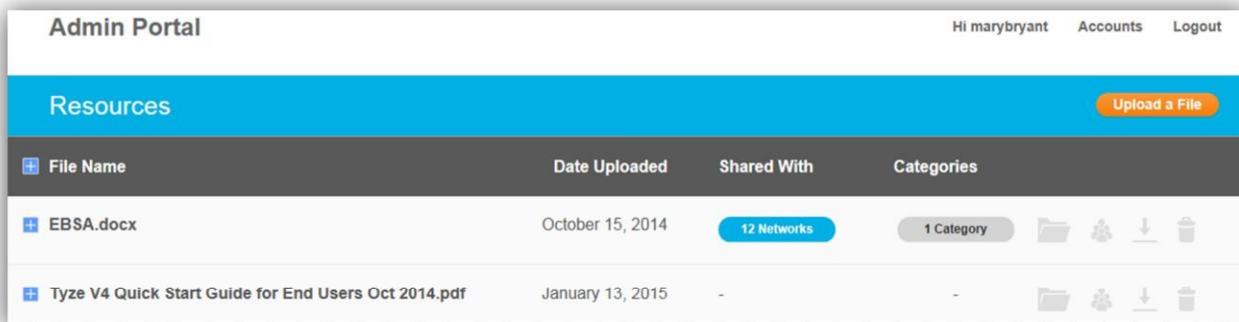
To share your file with a network or multiple networks, click the 'Share' icon and then select one or more networks.

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.



File Name	Date Uploaded	Shared With	Categories
EBSA.docx	October 15, 2014	12 Networks	1 Category
Tyze V4 Quick Start Guide for End Users Oct 2014.pdf	January 13, 2015	-	-

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.

3 Networks

1 Category

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!

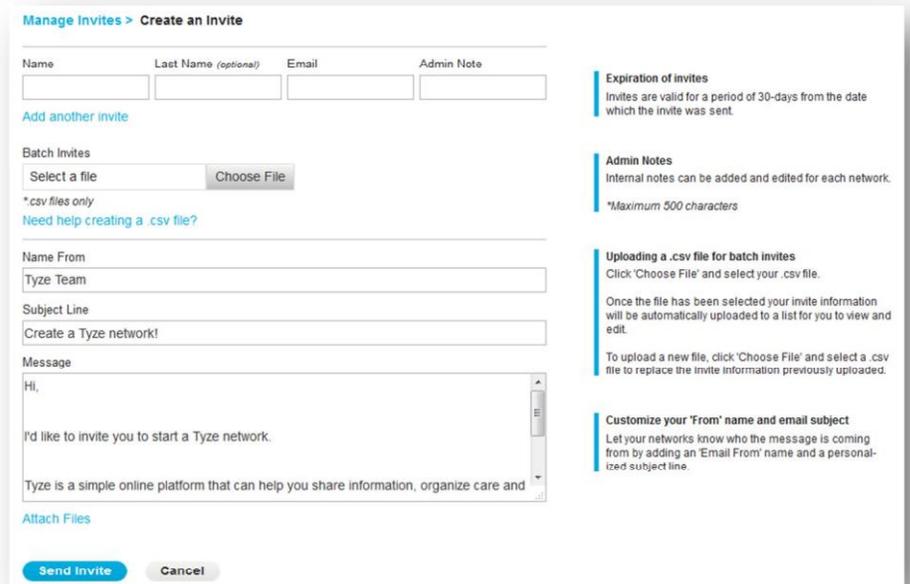
Step 8

## 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.



**Manage invites > Create an Invite**

Name  Last Name (optional)  Email  Admin Note

[Add another invite](#)

**Batch Invites**

Select a file

\*.csv files only  
[Need help creating a .csv file?](#)

**Name From**

**Subject Line**

**Message**

Hi,

I'd like to invite you to start a Tyze network.

Tyze is a simple online platform that can help you share information, organize care and

[Attach Files](#)

**Expiration of invites**  
Invites are valid for a period of 30-days from the date which the invite was sent.

**Admin Notes**  
Internal notes can be added and edited for each network.  
\*Maximum 500 characters

**Uploading a .csv file for batch invites**  
Click 'Choose File' and select your .csv file.  
Once the file has been selected your invite information will be automatically uploaded to a list for you to view and edit.  
To upload a new file, click 'Choose File' and select a .csv file to replace the invite information previously uploaded.

**Customize your 'From' name and email subject**  
Let your networks know who the message is coming from by adding an 'Email From' name and a personalized subject line.

## Sending Bulk Invitations

Manage Invites > Create an Invite

Name  Last Name (optional)  Email  Admin Note

Batch Invites  
example batch invite file.csv

\*.csv files only  
[Need help creating a .csv file?](#)

3 Total Invites

First Name	Last Name	Email	Admin Notes
John	Smith	jsmith@email.c	Network is for son. Dac
Mary	Jones	mjones@email.c	Network is for mother f
Bob	Thomas	bobthomas123@	Network is for Bob's wif

Name From

Subject Line

Message

Attach Files

**Expiration of invites**  
Invites are valid for a period of 30-days from the date which the invite was sent.

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Once the file has been selected your invite information will be automatically uploaded to a list for you to view and edit.  
To upload a new file, click 'Choose File' and select a .csv file to replace the invite information previously uploaded.

**Customize your 'From' name and email subject**  
Let your networks know who the message is coming from by adding an 'Email From' name and a personalized subject line.

- 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.

Name	Date Sent	Time Sent	Invite Status	
Alexey	December 15, 2014	8:56 AM	Withdrawn	
Alexey Test	January 12, 2015	11:19 AM	Pending...	
Alexey2 test	January 12, 2015	11:20 AM	Accepted	
AlexeyGFL	December 15, 2014	9:43 AM	Pending...	
AlexeyYahoo	January 2, 2015	11:26 AM	Pending...	
SAD	December 9, 2014	5:44 AM	Expired	

## Review Active Networks and Admin Notes

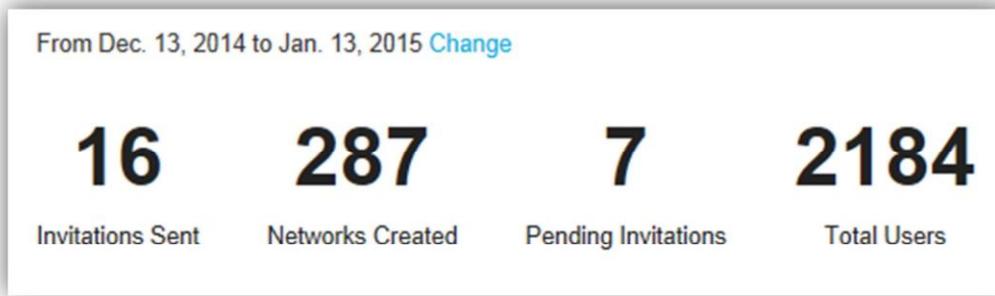


Now that you have sent invitations and networks are being created by your users, use the Active Networks tab to review networks created. You can also view any internal admin notes entered about the networks during the invitation phase, edit any existing admin notes or add helpful notes about the networks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

**Admin Portal** Hi richard Accounts Logout

**Calendar** [Create an Event](#)

January 2015

#	Sun	Mon	Tue	Wed	Thu	Fri	Sat
52	28	29	30	31	01	02	03
1	04	05	06	07	08	09	10
2	11	12	13	14	15	16	17
3	18	19	20	21	22	23	24
4	25	26	27	28	29	30	31

11 Sun 12 Mon 13 Tue 14 Wed 15 Thu 16 Fri 17 Sat

Starts at 6:00 pm  
Customer Appreciation Reception

Event Details	Date	Time	Shared With
<b>Caregiver Webinar - RSVP Event</b> Join our panel of experts for a discussion about caregiver resources in the community.	8 People Accepted 12/16/2014 12/16/2014	8:30 AM 10:00 AM	1 Network
<b>Customer Appreciation Reception - RSVP Event</b>	6 People Accepted 01/16/2015 01/16/2015	6:00 PM 7:30 PM	1 Network

**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

The screenshot shows the 'Calendar' app interface for creating an event. At the top, there is a blue header with the word 'Calendar'. Below it, a breadcrumb trail reads 'Calendar list > Create an event'. The form contains several input fields: 'Event title' (a single-line text box), 'Description' (a large multi-line text area), 'Start date' (a date picker showing '2014-11-04'), 'Start time' (a time picker showing '08 : 30 AM'), 'End date' (a date picker showing '2014-11-04'), and 'End time' (a time picker showing '09 : 30 AM'). Below the date and time pickers, there is a checkbox labeled 'RSVP required for this event' which is checked. At the bottom of the form, there are two buttons: a blue 'Send' button and a grey 'Cancel' button.

- 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

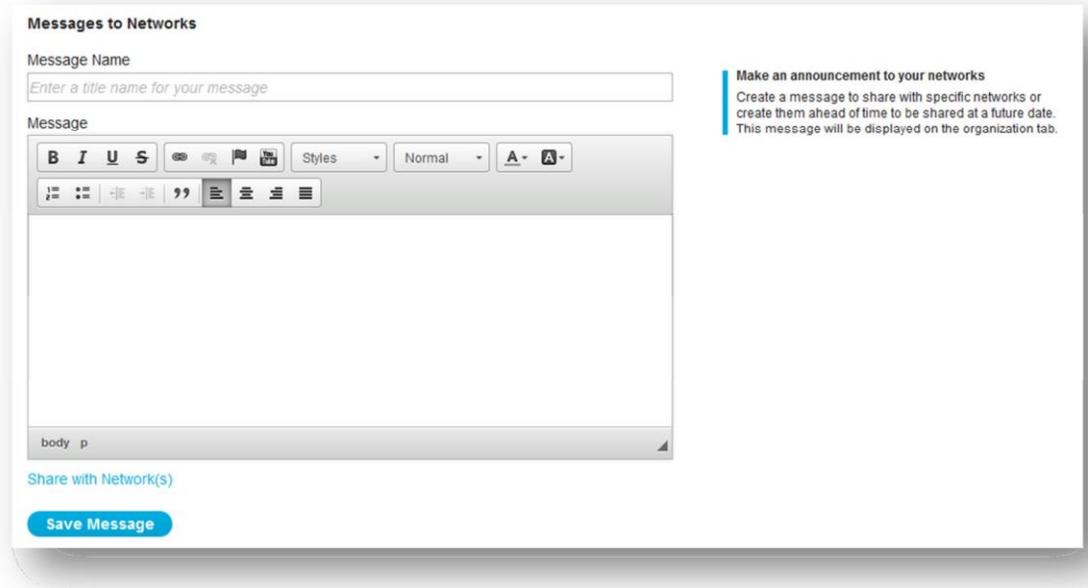
# Communicating with Networks Using Admin Messages

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.

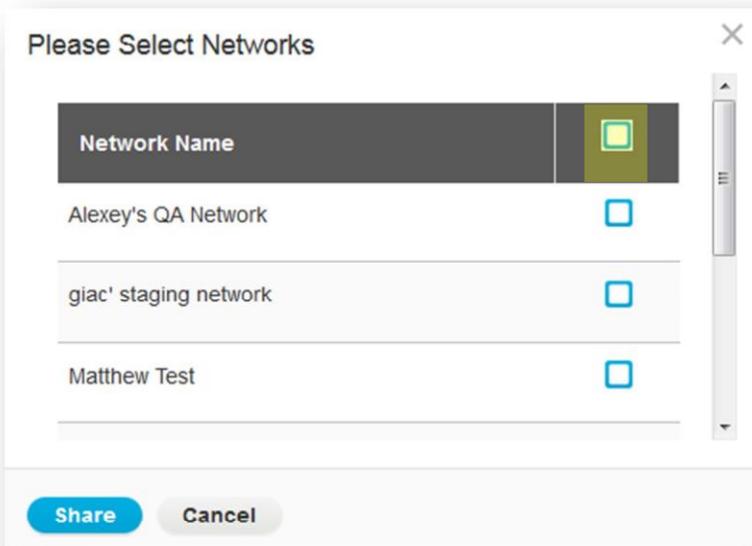
To enter a link to a website, click the link icon.



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

A screenshot of the "Messages to Networks" form. It features a "Message Name" field with a placeholder "Enter a title name for your message". Below is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, list, and image. The editor is currently empty. To the right, a blue box contains the text: "Make an announcement to your networks. Create a message to share with specific networks or create them ahead of time to be shared at a future date. This message will be displayed on the organization tab." At the bottom, there is a "Share with Network(s)" link and a blue "Save Message" button.

### Please Select Networks

A screenshot of the "Please Select Networks" dialog box. It has a close button (X) in the top right corner. The dialog contains a table with three rows. The first row is a header with "Network Name" and a yellow-highlighted checkbox. The second row is "Alexey's QA Network" with an unchecked checkbox. The third row is "giac' staging network" with an unchecked checkbox. The fourth row is "Matthew Test" with an unchecked checkbox. At the bottom, there are "Share" and "Cancel" buttons.

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.

The screenshot displays a user interface for a Tyze Personal Network. It features a header section titled "Staging - About Us" with a paragraph of text. Below this, there are two main content areas. The left area is titled "Don't Miss Our Upcoming Webinar on Respite Care" and contains a message about a webinar on February 5th, a "Hide History" link, and a table of messages. The right area is titled "Resources" and contains a dropdown menu for "All categories" and a table of resources.

**Staging - About Us**

Tyze Personal Networks, powered by Saint Elizabeth Health Care, is a simple, private online tool that brings people together around someone receiving care. Our goal is to provide a useful tool to help caregivers actively engage a circle of care, distribute important information and provide peace of mind that care needs will be shared and met. That's what caregiving is - family and friends stepping in to help anyone in their family or community. At Saint Elizabeth, we want to ease the caregiving process for you and your loved ones through the use of a Tyze Personal Network.

**Don't Miss Our Upcoming Webinar on Respite Care**

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*Message posted on January 13, 2015 - 3:01p.m.*

[Hide History](#)

Name	Date
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<a href="#">Don't Miss Our Upcoming Webinar on Caregiving!</a>	01/13/15 @ 2:52p.m.

**Resources** All categories

File Title	Date
<a href="#">Tyze V4 Quick Start Guide</a>	01/13/15 @ 2:55p.m.

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