**GivePulse Training**

Week 1

**Student View -**

Use subdomain - [Umassd.givepluse.com](http://Umassd.givepluse.com)

Subgroups equivalent is. Campus groups on Corsair Engage

Some campus groups may be private. In that case, a student needs to request to join and that request is approved by an admin.

Affiliates equivalent is Community partners on Corsair Engage

Get Involved equivalent is Explore on Corsair Engage

Can restrict get involved search engine causes to community partners of university. Otherwise it shows all give pulse causes near the area.

Can register for events. Once a registration is complete, the student get an email with information about the event and all its details. Can keep track of registration under My Activity and Registrations.

To update/cancel registration, go to registration under My Activity tab and click on Actions drop down menu. Within that menu, select whatever is needed.

Only admins can create affiliate group/pages, students can’t do that.

Need a certain level of GP membership to get unlimited subgroups but we get unlimited affiliates.

The reminder/registration email is autogenerated by GP but at higher levels of subscriptions, we can edit the text of the email. I wonder if we can>>

GP people set up the subdomain.

Adding Impacts - Can do it through activity or through the event page.

Requested Information is built out by the admin of the event and can be customized for each event. Can request specific information.

Once impact is added, a verification email is sent to the verifier and the student can keep track of it in Logs. There they can view when the mail was sent and if they have viewed it or not.

Impact can be updated, with the drop down menu right next to the impact. Can be deleted as well, at the bottom of the page. Once updated, the impact will need to be verified again.

Admins can turn off option for users to select their verifiers by having one default person who verifies emails.

Admins cans set the reminder email to be sent 1 week/48 hours/24 hours in advance. Can use either one or some combination of the three.

If the student has the GP app on their phone, they will also be sent a push notification, if notifications are on.

Account/Profile - Profile is the public profile on view. If some Information needs to be changed, click on edit Profile and that takes us to the Account view which also be accessed through the Account option under Hi Student tab.

Sometimes, the info is added directly through the school database, and in that case some info might be locked i.e. can’t be changed.

Adding additional email might be useful when students graduate/leave college.

Opt In/Out is a toggle option.

Any message sent through GP is also sent to the users private/work email.

As an admin, one can only opt other admins out of their admin emails but can’t do the same for students.

Week 2

**Admin Basics**

First thing to notice as admins is the blue manage button.

Can get to group homepage via either manage button or nav bar manage button on top right

Main things to use are Users, Events, Impacts on the group homepage.

Users - everyone from students, faculty, staff will be shown

Will auto populate by data syncing. Need to turn that on or if not on then through a csv if needed

If auto-populated through data-sync users don’t need to activate their account

Can use search bar under some headers to search for specific users.

Can change layout using “Configure Layout”; Drag and Drop is available on optional columns

By clicking on any user we can get information about that user on a new tab

Managers have access to Membership Application and Administrative Fields where we can ask the users to input information needed. Eg. Asking if users are covid vaccinated, can ask them in membership application and that question will be prompted for old and new users and they will get a notification about it in their Account option under My Activity nav bar.

Can change user role by searching for specific user and then going to Actions drop down menu and choosing one of the available options there.

Can add a single or multiple user. To add multiple users, need to upload a csv in correct format.

Can build surveys in GP and can check responses

Events - Go to manage events same as manage users.

Similar interface to manage users.

Can Edit/Cancel events. Can also delete events as long as no one has registered for the event.

If we need to delete event that someone has registered for, need to talk to GP support for that.

Under Affiliate Events, i.e. events posted by community partners, admins can either promote or hide said event.

Can see promoted events under promoted events nav tab

Create Event -

Types of events :

1. Open opportunity events - Events that are open and have no start or end time.
2. Open opportunity time slot events - Opportunities that have specific timeslots during which users can choose to volunteer. Eg. Monday thru Friday, 8-5.
3. Single day events with shifts - events that happen in 1 day with shifts/timeslots. Or Just 1 time slot but having multiple jobs at the same time.
4. Recurring Event with shifts - events that recur with specific timeslots.
5. Project based event - can include milestones.

Event - any event that only takes attendance and not impact/hours(optional). As opposed to volunteer events which take them both.

Can click on the tiny question mark if need to clarify anything.

Administrator is by default the person who creates event. Can change that using drop down menu if creating event for someone else.

Multiple Privacy levels on the event - Help text is added next to it.

By clicking on any one, we get an option for what to do with non members of the group

Option to make it visible for non-members but registration is only possible for members.

Once event is saved there is option to further customize it. Don’t publish it if further customization is needed

Under advance nav bar on the left- we can add/ask for additional details

For published events - can also reach the same page by clicking on event -> Actions -> Edit and we’ll reach Advanced tab.

Registration Question - answers needed before registration

Impact questions - Questions asked when users add impacts; Good place to get feedback.

Manage Impacts - Can verify using Manage Impacts -> Actions -> Verify/Dispute

When disputed, we can add reason for disputing and then students can edit/correct their impact and resubmit for verification.

Can verify in bulk by checking all the user names and then go to bulk actions on top right and verify.

Let community partners verify impact before you do it yourself.

Week 3

**Group Management**

Under Network -> Manage Affiliations we will have all affiliations/community partners listed there.

Using Configure Layout , we can add columns to the layout. Eg. Organizer last visit tells us the last time affiliate admin logged into the platform.

Can cancel affiliations using the Actions nav bar

Our Events/their Events - Admins can control whether events by the community partner shows up on their home page using this feature. They can hide/show events on each other’s homepage.

Can add an affiliations using Action blue button on the same page(top right). Easier if partner is already using GP or else we’ll have to create a GP page for them and then turnover admin access.

Affiliation agreement - set of questions we can have the CP agree to before affiliating with them. Can build them out under Customize -> Affiliations.

Can see their response as we approve/deny their affiliations.

Under Network -> Manage Subgroups

To switch between parent campus groups, go to switch on the top left and choose.

Admin access rolls down to all the child nodes, whereas Information rolls up to each parent node.

SubGroups may have their own little network.

Network Visualization - under network -> network viz, we can see a network of all the groups under the main group.

Can switch subgroups around by clicking and then choosing move group to a new location. Takes about 15 min to update.

Under Customize ->

SAVE everything before going to a different tab

Customize User : Membership Settings

Join button : Enable or disable option. Disable if data syncing is ON. Enable to allow anyone to join a group.

Can control who joins by asking permission to join.

Using Membership Application, we can request info from people who wish to join.

Using Admin Fields, we can add a custom field to get more info. Only available to admins to be added/edited.

Customize Impacts(VImportant) ->

Auto Share Impacts - shares impacts with parents groups

Add impact behavior - When impact is added without choosing a group, option to see which groups to add impact to.

Network Settings - Applies to groups within our network

Select verifier - allows students to choose who verifies their impacts rather than just the admin

Group Settings - applies to specific groups

Timesheets - Allows user to enter multiple impacts in the same sheet

Global Impact Questions - Questions to ask users who add impacts under the subdomain, I.e. everyone sees them irrespective of groups or affiliations

Customize Subgroups ->

Let users create individual sub groups. Admin must approve them

Customize Whitelabel ->

Set custom mail - to reply to notifications from GP ; ideally a central email

Terms of Service - can set terms that we want the user to read through before creating account/logging in

Global Event Participation release form - whenever somebody registers for an event, they must go through this

Reporting ->

Mostly on the admin end

Useful to think about what info we want from users and set up events according to that

More Tools -> Tags

Tagging is a good way to categorize users. Can enable them using manage users -> configure layout -> tags

Can tag users/registrations/events/impacts

Email [support@givepulse.com](mailto:support@givepulse.com) to change admin access for community partners during a turnover/change at their end.

Week 4

**Academia**

Each class must be associated to a term

Create a new term by. Academia -> Term -> Actions -> Create New Term

If visible - Visible to users ;If completed - in the past

If done through data syncing, happens automatically

Data sync can be accessed using More Tools -> Data Sync

Data sync done by the IT team but possible that we might have to go through some things.

Syncs every night/ Must unhide new terms added by IT manually as it is hidden by default

Hide terms at the end of each semester when it is over.

To add a new course -

Academia -> Add class; both instructors and admins have the same access. Just labelled differently

Manage Classes

Usual filters to sort through semester/classes

Faculty View of GP-

Instructors can go to Manage or My Activity to look the courses that they are instructors in

Can also look at previous courses they have taught

Actions -> Course Summary report gives access to a summary of the entire course

Customize -> Whitelabel : Change labels and give it a personal feel

Look and Feel - create threads and let others comment or discuss on it

Instructors can also set Global Impact Questions for their course.

They can also promote specific events for their courses. Go to event homepage and click on promote on the center right. This will send a request to the event admin for approval. Once that is done, then the event will be there to view on Projects section of the class homepage.

Adding Impacts to a course -

A new course engagement section automatically turns up for users enrolled in a course; Not available for people not enrolled in a course

Allows them to add impacts to the course when adding from outside the course homepage

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