

Back-to-School Admin Prep: The 4-Step System Setup

Your sequential checklist for a flawless, automated platform rollout this school year.



torsh

1.

STEP 1: Configure Custom Roles

Start by defining exactly what your new staff can and cannot do in the system.

- ☐ **Clone Default Roles:** Rename the primary default roles (Administrator, Coach, Mentee) to match your organization's specific titles, or duplicate these base roles to build custom profiles like a 'Coach Manager'.
- ☐ **Dictate System Behavior:** Select specific "Coaching Modes" when cloning to ensure users are routed correctly without triggering the wrong system alerts.
- ☐ **Customize Access:** Click the 'Manage Permissions' tab to customize permission and access to specific platform features and tools.
- ☐ **Lock It In:** Explicitly click Save Changes at the bottom of the screen to apply any modified permissions.

2.

STEP 2: Build Your Groups

Establish your organizational buckets before opening the front door.

- ☐ **Create Groups First:** Build your organizational groups prior to inviting any users. It is highly recommended to build groups out based on your coaching arrangements (e.g., one coach to a group of multiple mentees).
- ☐ **Prep for Automation:** Pre-loading your groups streamlines the onboarding process, allowing you to automatically drop new hires into their proper cohorts upon invitation rather than manually assigning them later.

3.

STEP 3: Bulk Invite & Manage Licenses

Bring your staff into the system at scale while auditing your active seats.

- ☐ **Import at Scale:** Utilize the bulk CSV import tool to simultaneously invite, assign roles, and group 100 or more users in a single upload.
- ☐ **Audit Existing Licenses:** Manage transitioning staff by marking them as Disabled (preserves data access but consumes a license) or Deleted (frees up a license slot and enters a 30-day restore window before permanent deletion).

4.

STEP 4: Automate Coaching & Sharing

Ensure visibility and routing happen automatically from day one.

- ☐ **Assign by Group:** Establish coaching assignments at the Group level rather than individually to easily transfer assignments and historical artifacts if staff changes occur.
- ☐ **Set "Opt-Out" Rules:** Configure system-wide sharing rules with an "Opt-Out" default structure. This guarantees newly uploaded materials are automatically shared with assigned admins or coaches without requiring users to manually enroll.

⚠️ PRO-TIP: SHARING RULES ARE NOT RETROACTIVE

Remember that any new sharing rules you establish will only apply to materials uploaded after the rule is created. Set these up before your teachers start uploading back-to-school artifacts!