



Development Note

New Group Admin Functions

Ver 1 : June 2022

Applies to: All Group Admins

Previously, only System Admins could set-up Groups, Administrators, Supervisors, Mentors etc. and allocate students/users to them, and we were asked to get involved in day-to-day activities which should have been the responsibility of the Local Admins (especially due to GDPR protections on who can access personal data).

The new changes to the system mean that System Administrators still add the Group (which auto-generates a default login/registration page) and add a Tier 1 Main Local Admin (MLA). This MLA can then carry-out all necessary functions for the Group themselves.

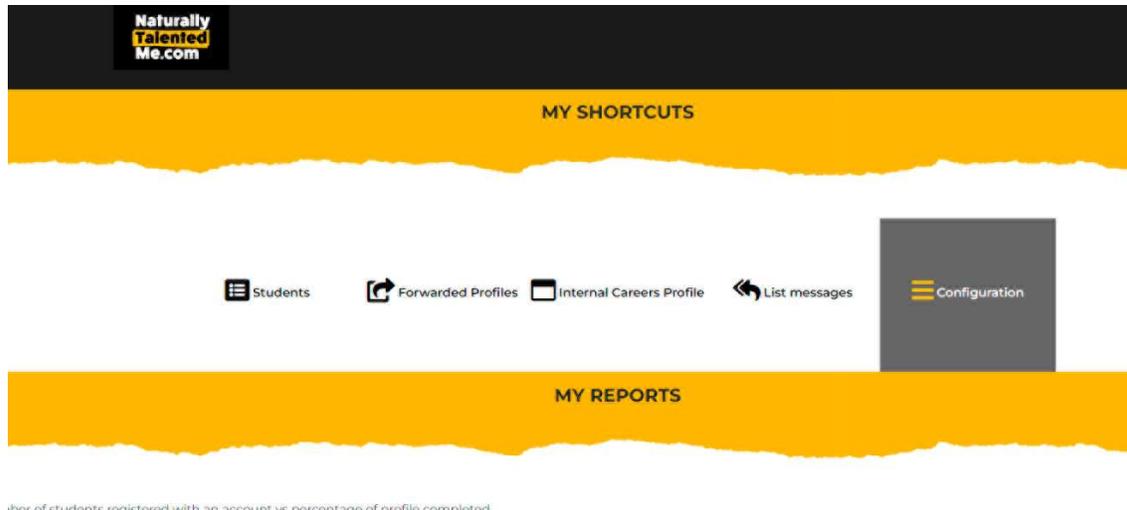
Main Local Admin Functions

The MLA (and any other admins below them they allow to – see later) can now:

- Manually add users
 - Bulk-add users via spreadsheet upload
 - Add Admin accounts at Tier 2, Tier 3 and Tier 4
- Assign any admin/supervisor as a mentor (only at time of set-up – this cannot be added later)
- Assign users/students to any Admin, Supervisor or Mentor.
- Alter user email addresses, names, and activate the reset password feature for any user
 - Change Admin names, email addresses and mobile numbers
- Update any internal portal

Note that all admins added by the MLA will need to have a valid mobile number associated with them as 2 form factor logins will be enabled by default.

A new dashboard icon called “Configuration” is used to access the new features



Adding Administrators/Supervisors/Mentors

The Tier 1 (MLA) Admin should consider the hierarchy they need for reporting etc. prior to adding new admins below them. Changes to allocations can be made later, but it is much easier to spend the time to work out the best configuration and use it from the beginning wherever possible. NTM assistance may be required (and is recommended – maybe as part of the Admin training session) for this stage.

To add an Admin/Supervisor/Mentor, the MLA needs to enter the person’s name, email address, a password, and a mobile number.

They will not be able to add an Admin without supplying a valid mobile number and a valid (and unique) email address. If an incorrect number/email address (or dummy info) are used, the newly added admin will not be able to access the system and System Admin intervention will be required.

Local Admin / Supervisor

Name

Email

Password

Mobile

Hierarchy

Hierarchy Level

Any changes to the local / admin and supervisors in this area will be reflected in the student assignment. Which will be under the new local admin/supervisors selected.

Tier 1 - Local Admin

Tier 2 - Admin

The hierarchy level of the Admin is also chosen here, together with the interim reporting chain. Some of these interim stages will be auto-filled (e.g. if there is only 1 contact at each level) or may be unavailable, depending upon the structure of the remainder of the hierarchy. See notes at the end of this document for more information on hierarchy.

Hierarchy

Hierarchy Level

Tier 2 - Admin

Please Select.....

Tier 3 - Admin

Please Select.....

If adding a Tier 2 Admin, there is no need to enter Tier 3 Admin and Tier 4 Admin details. If adding a Tier 3 Admin, you will need to assign a Tier 2 Admin contact etc. This is important so that students assigned to each admin/Supervisor/mentor also appear in the reporting of their management chain.

Note that if the person being added is to have Mentor functionality (e.g. enhanced messaging and the ability to verify student-added details before they go live), it is important that this is done at this stage, during set-up as this cannot be added later.

Hierarchy

Hierarchy Level

Mentor

Please Select.....

Tier 2 - Admin

Similarly, an Admin's level in the hierarchy cannot be changed later, so the group MLA should spend time (with assistance from NTM) to get this data entered correctly on set-up. If this is required later, system administration input will need to be requested.

Once the new admin has been added (but not until the Confirm button has been pressed to save the new details), students/users can be assigned to them.

Assigning students/users to an admin/Supervisor/Mentor

By default, all students/users in a group are associated with the Tier 1 (MLA) Admin. This means the user is included within the reporting seen by the MLA and they can click-through to see student details, edit student details etc.

The MLA can see how many students/users are directly associated to each admin (including themselves) in their list of admins.

Configuration

Add New Admin / Supervisor

Copy CSV Excel Print PDF

Search:

	Name	Reports to	Students
Edit	Matilda White	Tier1	8 Students
Edit	Charlie Black	Tier1- Matilda White- Martin Blue	0 Students
Edit	Elaine Brown	Tier1- Matilda White- Martin Blue	0 Students
Edit	Susan Green	Tier1- Matilda White- Martin Blue	0 Students
Edit	Charlotte Red	Tier1- Matilda White- Martin Blue	0 Students
Edit	New Tier 4	Tier1- -	0 Students
Edit	Martin Blue	Tier1- Matilda White	0 Students

Showing 1 to 7 of 7 entries

The Tier 1 user will always be able to see details for ALL group members.

To also add a user to a lower level admin (and anyone in the interim tiers), it is a simple matter of clicking Edit for the admin in question and then using drag-and-drop in the set-up/configuration for that admin. The best approach is, therefore, to make sure the hierarchy of admins is in place first, and then allocate users/students to the lowest level contact that should be able to access their details/include them in reports.

Hierarchy

Hierarchy Level

Any changes to the local / admin and supervisors in this area will be reflected in the student assignment. Which will be under the new local admin/supervisors selected.

Tier 1 - Local Admin

Tier 2 - Admin

Tier 3 - Admin

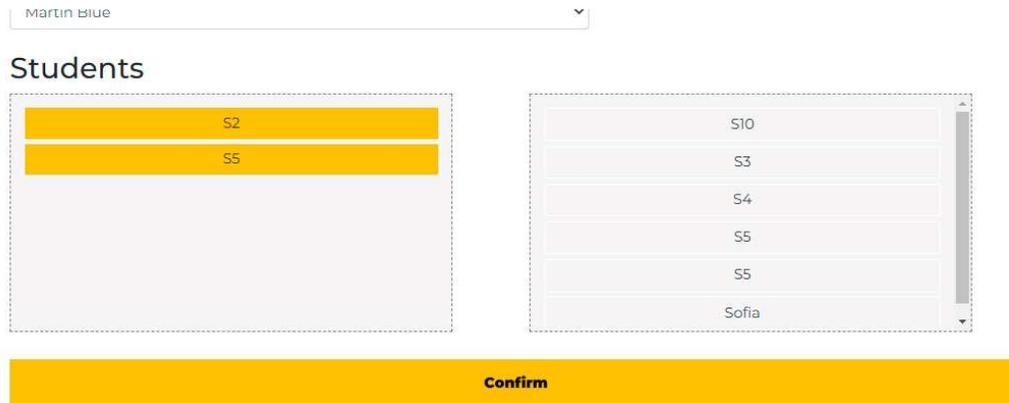
Students

S2
S5

S10
S3
S4
S5
S5
Sofia

Confirm

To allow the admin to see details for a particular student/user (and include them in their combined reporting), drag from right to left and then click on the Confirm button (after which the student will appear in a Yellow box).



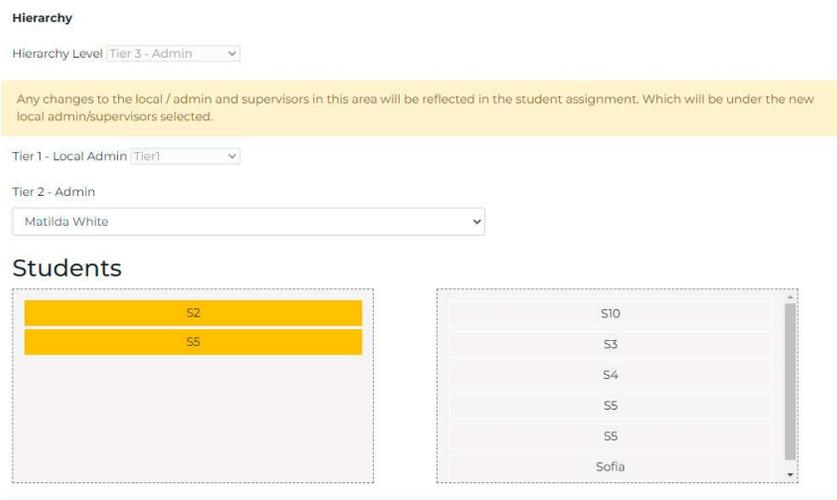
Note that, in this case, the Admin/Supervisor (Charlie Black) the students have been assigned to is Level 4 in the hierarchy and reports into a Tier 3 Admin called Martin Blue, who in turn, reports into a Level 2 Admin (Matilda White), who in turn reports into the MLA in the hierarchy. This means that all three will be able to access the user details for users S2 and S5.

This is verified in the updated list of admins:

Search:

	Name	Reports to	Students
Edit	Matilda White	Tier1	8 Students
Edit	Charlie Black	Tier1- Matilda White- Martin Blue	2 Students
Edit	Martin Blue	Tier1- Matilda White	2 Students
Edit	Elaine Brown	Tier1- Matilda White- Martin Blue	0 Students
Edit	Susan Green	Tier1- Matilda White- Martin Blue	0 Students

And in the student allocation for the other 2 Admins (who might also have other students/users listed):



Moving students around

This is done from the admin management section (“Configuration”) rather than the student management section.

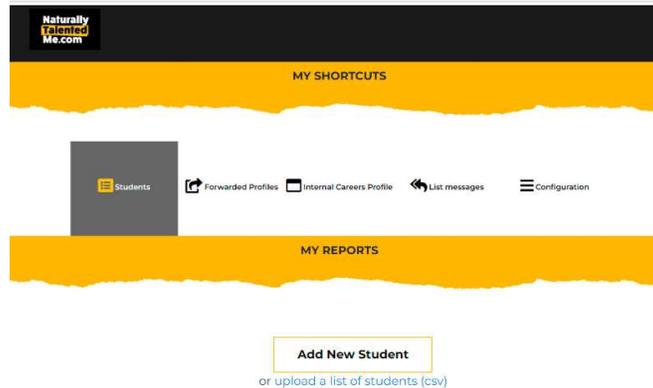
If an Admin has permission to move students around themselves (see below) or the MLA does so on their behalf, they can de-select a user from their group by using drag-and-drop (from left to right).

This will also remove the student/users from all associations below the admin in the hierarchy, but not above them.

A student/user can only be associated with one mentor and one admin in each tier (so a student assigned to a Tier 4 mentor is visible to that mentor, the tier 4, 3 or 2 admin they report into, all the way up to Tier 1 – the main MLA has visibility of/reporting on all users within the Group).

Student Management

New functionality allows the admin(s) to alter student/user name, email address information etc. direct from the list of users/students. They can also implement a password reset on behalf of the user. A password reset link will be sent to the (valid !) email address, or the user can have a magic login link sent to the same email address if they prefer.



Select a Set of Talents and List the Top 50 Matches Compare Students vs. Opportunity required Talents

Copy CSV Excel Print PDF Search:

		Name	Email	Profile			
Edit	Remove from School	Sofia	tierstudent1@gmail.com Daily: 😊 Monthly: 😊 Wellness Report	< 35%	Send Message	<input type="checkbox"/>	Profile ...
Edit	Remove from School	S2	tierStudent2@gmail.com Daily: 😊 Wellness Report	< 35%	Send Message	<input type="checkbox"/>	Profile ...
Edit	Remove from School	S3	tierStudent3@gmail.com Wellness Report	< 35%	Send Message	<input type="checkbox"/>	Profile ...
Edit	Remove from School	S4	tierStudent4@gmail.com Wellness Report	< 35%	Send Message	<input type="checkbox"/>	Profile ...
Edit	Remove from School	S5	tierStudent5@gmail.com Wellness Report	< 35%	Send Message	<input type="checkbox"/>	Profile ...

Name

Email

Note that when a student/user is added to the system (either by themselves or manually by an admin, or in bulk, valid email addresses must now be used (due to increased login security – dummy email addresses will no longer work!).

Function Accessibility

The default is that only the Tier 1 (MLA) Admin has access to the above features. However, the MLA can also allow other administrators below them to have the same functionality, including other admins etc. for all of the hierarchy below them. This can be useful where a group has a physically-separated management team, or where a large group, such as a school wants to delegate admin tasks etc. to heads of department, year heads etc.

This function can be added to an Admin only after they have been saved to the system, not whilst they are being added. It is a simple case of the MLA checking the relevant tickbox.

Name

Email

Mobile

Allow management of hierarchy/student allocations

The specified user will then see a Configuration icon on their dashboard and will be able access the above functionality, only for the hierarchy below them.

Reporting and Hierarchy

Admins/Supervisors/Mentors have access to student details and reporting only for those students assigned to them or someone below them in the hierarchy. Tier 1 MLAs see reporting etc. on ALL group members.

As an example, if the hierarchy is:

Tier 1 MLA

|

Tier 2 Admin

|

Tier 3 Admin - Mentor 1

|

Tier 4 Admin - Mentor 2 - Mentor 3

If Mentors 1, 2 and 3 each have 5 users assigned to them, Tier 4 Admin has 15 users assigned to them (non-mentored), Tier 3 Admin has 12 users assigned directly to them, Tier 2 Admin has 6 and Tier 1 Admin has the remaining 30 users assigned directly to them, the numbers of users/students each will see details/reporting for is:

Tier 1 Admin	78 (the whole group)
Tier 2 Admin	48 (42 from Tier 3 admin plus their own 6)
Tier 3 admin	42 (25 from Tier 4 admin, 5 from Mentor 1 and their own 12)
Mentor 1	5
Tier 4 Admin	25 (their own 25 plus the 5 each from the mentors reporting to them)
Mentor 2	5
Mentor 3	5