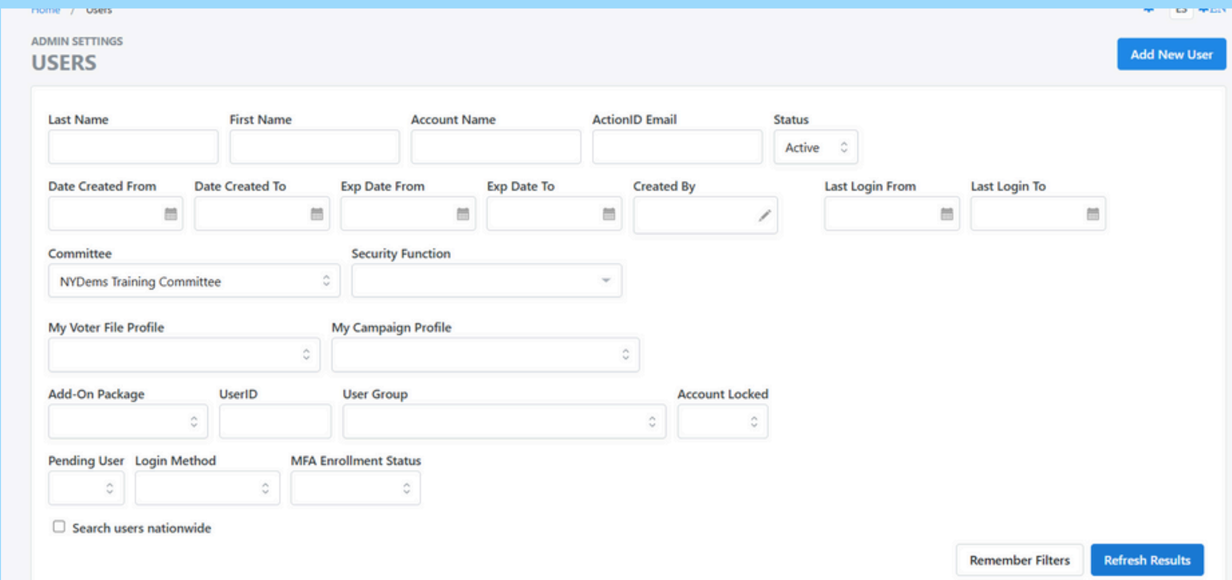
User Management

Accessing, Creating, and Understanding

Welcome to User Management Training!

What we will discuss:

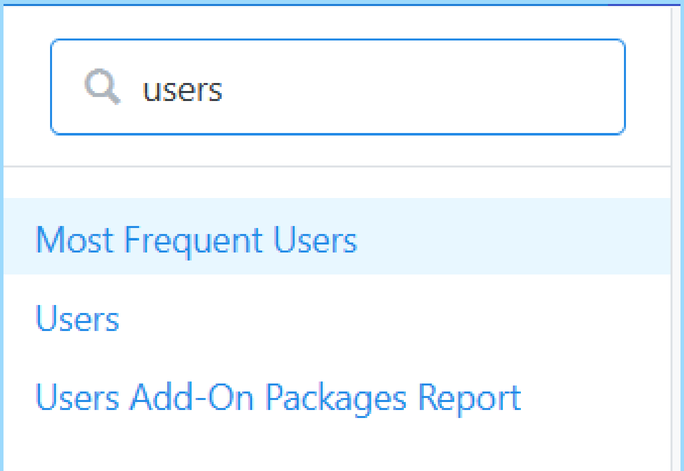
1. ***Accessing the User Management Page***
2. ***User Profile Levels***
3. ***Creating a New User***
4. ***Editing an Existing User***



NY DEMS VAN TRAINING

How to Access the User Management Page

1. **Log into VAN.**
2. **Make sure you are in the MyVoters side.**
3. **Find the search bar in the menu on the left side of the screen. If you can't see it, click the symbol with the three white lines in the top left corner.**
4. **Type in 'Users', and click the option that says 'Users'.**

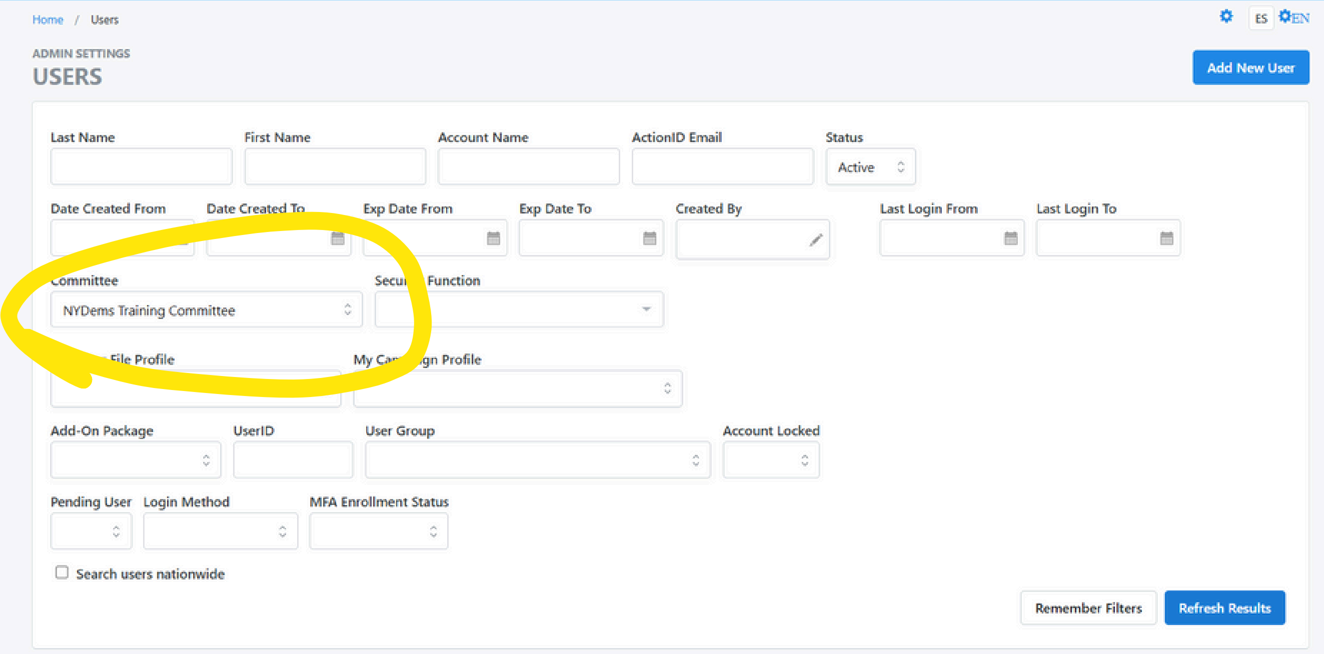


User Management

How to View Users in My Committee

1. If it is not already selected, choose your committee name in the dropdown under 'Committee', and click 'Refresh Results'.

You will now be able to see all of the users in your committee. If they are in blue, you have permission to edit or modify their profiles. If they are in grey, your access is not high enough, and you should contact the person listed as a 'Field 1'.



Identifying User Profiles

There are a lot of user profiles available in VAN. These are the ones we recommend using:

Field 1:

The committee/campaign admin. They have full access to all data and information in your VAN instance. It is recommended that only one or two people have this User Profile type per VAN instance for data security purposes, as they have the final call on all VAN-related decisions. These profiles can only be modified by the State Admin.

Field 2:

This is appropriate for Field Directors, Data Directors, Deputy Campaign Managers, and other senior levels of staff. They have full access to all necessary tools and information.

Identifying User Profiles cont.

Field 3:

This profile is for Field Organizers, and other junior staffers. They have access to tools for Field purposes and basic data analysis, but will not have a full overview.

Field 4 and Field 5:

These profiles are much more limited. Users will not be able to modify Survey Questions, Activist Codes, or other sensitive tools. This is recommended for super volunteers or interns.

Other profiles will be limited in functionality. If you have questions about the specific accesses of each profile, go to the User Profiles page via the search bar.

How to Create a New User

1.) Access the Users Screen.

2.) Click the blue ‘Add New User’ button in the top right corner.

3.) Contact Information section

We recommend using the user’s full first and last name, not nicknames. We also recommend selecting ‘Send a copy of this email to yourself’ for documentation purposes, and so you can be sure the form goes through correctly.

4.) User Details section

Choose your committee, and the MyV and MyC profiles you prefer. Note that you will only be able to assign access levels that are below your current user profile. For higher access, contact a member of your team with higher access.

How to Create a New User, cont.

5.) We recommend selecting the 'Expire this account after a set amount of time' box, and assigning access out until the end of the user's contract. This practice will be good for your campaign's information security!

6.) Select the blue 'Create User' button at the bottom.

After you create the user, an email will be sent out to the email address you entered under contact information. The user will need to find the email and click the 'accept invitation' button in order to gain access. This invitation is time sensitive, and will expire if not responded to within 48 hours.

If the invite expires, access the user's account page from the User Management page, and click the 'resend invite' button.

Editing an Existing User

1.) Access the User Management page and modify your search to view the user you want to modify

2.) Click on the blue name of the person. If it is in grey/black, you are not authorized to modify this person and should reach out to you campaign's Field 1 Admin.

To Reset Multifactor Authentication

Click 'Reset All'. This will prompt the user to create a new method.

Status Section

To deactivate the user, toggle from 'Active' to 'Inactive', or put a date in the 'Date Expires' section. This will not delete their data, just remove their access to it.

Editing an Existing User, cont.

Assign Person Access by District Section

Click the blue ‘Assign People’ button, and this will bring you to a page where you can add access to a user’s profile. You can do this on pretty much any Home District breakdown level.

Status Section

To deactivate the user, toggle from ‘Active’ to ‘Inactive’, or put a date in the ‘Date Expires’ section. This will not delete their data, just remove their access to it.

Additional Contact Information

We recommend filling this section out for every user. This will be used for contact by Admins in the event of an account issue.

Editing an Existing User, cont.

Security Section

This section is where you can modify the user profiles for MyVoters and MyCampaign, and see the actual details of what functions they can perform. With any questions about this section, please reach out to our support desk!