

Quick Reference Guide for Organizations

Organization Management

Create an Organization

1. Go to **Organizations: All Organizations**.
2. Click **Add Top-Level Organization** to create a top-level organization, or click **Add** to create a sub-organization.
3. Enter a name, then click **Create**.

Edit Organization Details

1. Go to **Organizations: All Organizations**.
2. Click the **Dashboard** link next to the desired organization.
3. Click the **Go to Details** link in the upper right corner.
4. Click **Edit** at the top of the window.
5. Edit the information.
6. Click **Save**.



Notes

Top-level Organizations

Entities of the highest level and authority. They can have sub-organizations but cannot have any "parents."

Sub-organizations

"Children" of another organization.

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Access Level Management


Create Access Levels

1. Go to **Organizations: All Organizations**.
2. Click the **Dashboard** link next to the desired organization.
3. Click **Go to Access Levels**.
4. Click **Create Access Level**.
5. Enter the necessary information.
6. Click **Create**.

Set Default Access Level

1. Go to **Organizations: All Organizations**.
2. Click the **Dashboard** link next to the desired organization.
3. Click **Go to Access Levels**.
4. Select the desired default access level from the drop-down list.

Edit Access Levels

1. Click  next to the desired access level.
2. Click **Edit**.
3. Make any necessary changes.
4. Click **Save**.

Notes

Access Levels

Permission sets that determine the tasks users can perform within the organization.

When you create a sub-organization, it copies its parent's access levels. Add and edit access levels before adding sub-organizations.

Default Access Levels

The access level where members are automatically placed when they are added or accepted into an organization.

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Membership Management

Add Members

1. Go to **Organizations: All Organizations**.
2. Click the **Dashboard** link next to the desired organization.
3. Click **Go to Members**.
4. Click **Add Members** and enter a name in the Search Center.
5. Select the desired users from the results
6. Click **Add Users**.

Assign Members to Access Levels

1. Go to an organization's **Access Levels** page.
2. Click the number of members link in the **Members** column.
3. Click **Add Members**.
4. Select the desired members.
5. Click **Add Members**.

Access Levels

Settings

Default Access Level: Base User

Access Levels

+ Create Access Level

Access Level	Members
Administrator <i>i</i>	7 Members
Base User <i>i</i>	38 Members

Notes

Access Level Permissions
Access levels allow members to:

- See other members
- Send messages to other members
- Edit the organization details
- Transfer members

Access Level Assignments
Members are automatically added to the default access level when they are added or accepted into the organization, but you can change their access level at any time.

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Membership Management

Change Membership Status

1. Go to **Organizations: All Organizations**.
2. Click the **Dashboard** link next to the desired organization.
3. Click **Go to Members**.
4. Use the **Status** drop-down menu to select a status for each member.

Members

+ Add Members

Sort By: Name | Display Filter: Status: All

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Name	Organization	HAN Roles	Status
<input type="checkbox"/> Arthur Adelsberg	Maternity		Rejected
<input type="checkbox"/> Charles Allen	Maternity		Researching
<input type="checkbox"/> Michael Abney	Maternity		Researching
<input type="checkbox"/> Nicholas Alves	Maternity		Pending
<input type="checkbox"/> Perry Alves	Maternity		Accepted

Notes

Member Statuses

Accepted - the user has been accepted and can view organization details and contact information.

Rejected - the administrator has denied the user's request.

Pending - the administrator has not taken any action on the user's request.

Researching - the administrator is researching to determine whether the user's organization affiliation is authentic.

TIPS

- ✓ Use **Display Filter** to display members with a **Pending** status only.
- ✓ Members you add will automatically have an **Accepted** status.