

A man and a woman are working together at a laptop in an office. The woman is sitting and smiling, holding a pen. The man is standing and leaning over her, looking at the laptop screen. The background is a modern office with glass walls and plants.

WEBINAR

Unlocking the Power of Social Pinpoint: Mastering User Management in Social Pinpoint



Meet Your Hosts

Stephan and Woo-Ree



Stephan Nakamura

Implementation Manager



Woo-Ree Cho

Senior Customer Success Manager

Housekeeping

- **Event timing:** The webinar is scheduled for 45 minutes
- **Technical issues:** If you experience any issues during the live event, please contact us at events@socialpinpoint.com
- **Recording and slides:** The on-demand recording and presentation slides will be emailed to you in the coming days
- **Questions:** Please leave any questions in the Q&A box

Agenda

- **User types & roles:**
 - **Site-level user types:** Site Administrators, Site Users, Community Members
 - **Project-specific roles:** Team Lead, Project Lead, Project Author, Preview User
- **Team management:** Set up and assign team members, nominate Team Lead
- **Workflow management:** Scheduling and publishing, approval workflow
- **Member dashboard:** Internal SSO integration and public SSO integration
- **Community members:** Access and engagement

Importance of Different User Roles & Types

- **Security and data protection:** Limiting access ensures only authorized users can make changes, safeguarding sensitive project data.
- **Role-specific responsibilities:** Tailored permissions match tasks (e.g., project creation vs. content editing), streamlining workflows.
- **Efficient project management:** Clearly defined roles like Project Lead and Project Author enhance team collaboration and reduce confusion.
- **Scalability:** Structured user roles simplify onboarding and project management as organizations expand.

User Type – Site Administrators

- Site Administrators have full access to all site features and settings, including user management, content handling, and site configurations.
- **Key responsibilities:**
 - Delegate permissions and responsibilities as needed
 - Enforce workflow processes and approve incoming submissions
 - Maintain smooth site operations and uphold quality control across all areas

User Type – Community Members

- Community Members are individuals who join your online community, actively participating in discussions, providing feedback, and engaging in initiatives and projects to help shape and grow the community.
- **Key responsibilities:**
 - Engage in content sharing, discussions, and collaboration
 - Contribute to initiatives and projects within the community
 - Help build and grow the community by staying active and involved

User Type – Site Users

- Site Users have access to specific features and functions based on their assigned projects, allowing them to contribute or manage project content while focusing only on the tasks that are relevant to them.
- **Key responsibilities:**
 - Access only to the projects they are assigned
 - View and interact with content relevant to their tasks
 - Focus on specific, actionable items based on their permissions

Site Users

Project Specific Roles



Team Lead

Full access to all projects associated with a team

- ✓ Viewing rights
- ✓ Editing and authoring rights
- ✓ Publishing rights
- ✓ Access data and reports

Can also create new projects (in some cases)



Project Lead

Full access and authoring rights to a specific project

- ✓ Viewing rights
- ✓ Editing and authoring rights
- ✓ Publishing rights
- ✓ Access data and reports
- ✓ Approve changes from *Workflow*



Project Author

Access and authoring rights to a specific project

- ✓ Viewing rights
- ✓ Editing and authoring rights
- ✗ Publishing rights
- ✓ Access data and reports
- ✓ Submit changes to *Workflow*



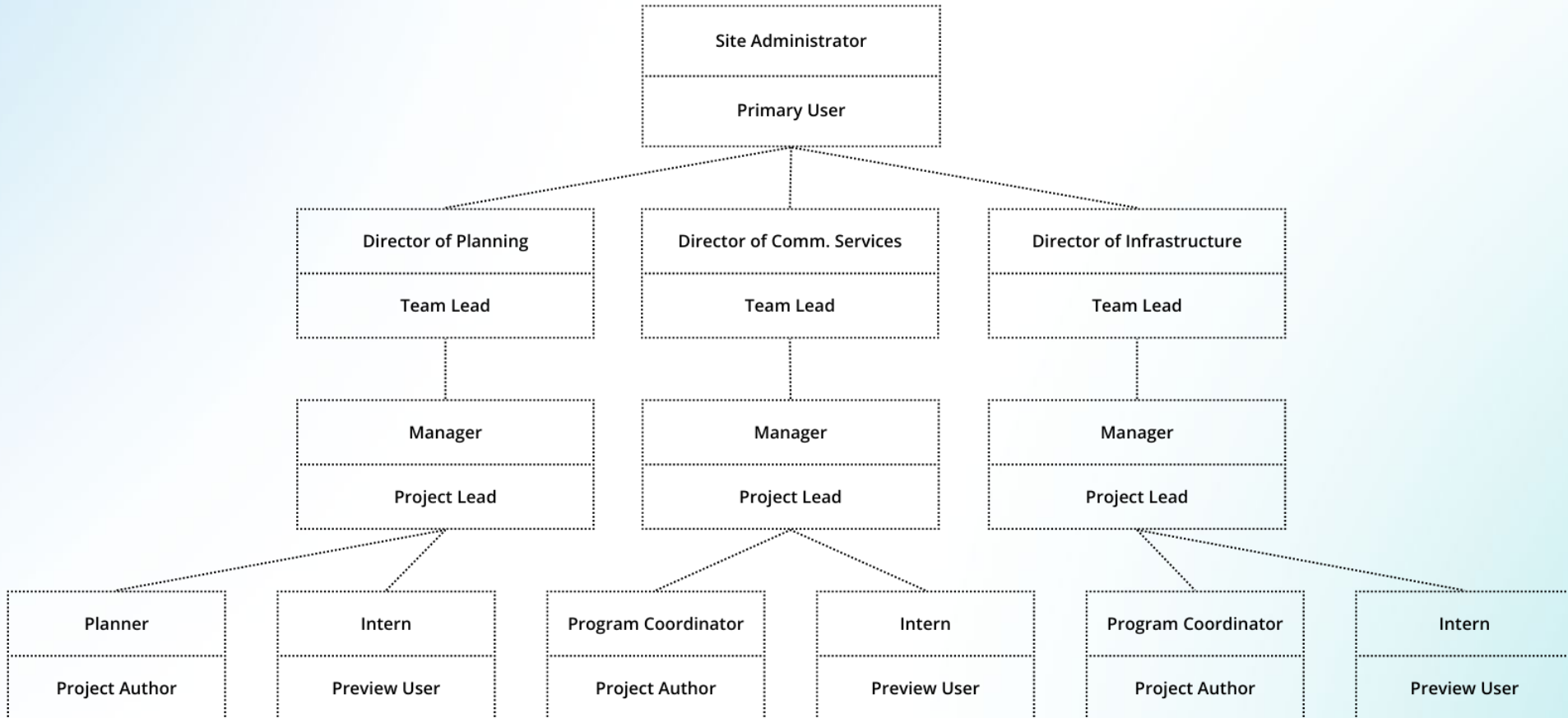
Preview User

Viewing only rights to a specific project

- ✓ Viewing rights
- ✗ Editing and authoring rights
- ✗ Publishing rights
- ✗ Access data and reports
- ✗ Submit changes to *Workflow*

Site Users

Project Specific Roles Example



Site Users

Project Specific Roles Steps

Site Admin creates a team and assigns Team Leads from the site users.

Team Leads create projects for their respective teams and assign Project Leads.

Project Leads invite Project Authors and Preview Users through the project settings.

Project Authors submit edits to Project Leads or Team Leads for workflow approval.

Preview Users can review draft projects before they are launched.

Teams Feature is automatically disabled but can be enabled upon request.

Glossary

- **Drafts:** Pages that have not yet been published are automatically hidden from the public internet and the live version of your site.
- **Publish:** An action that makes your draft page visible to the public internet and updates the live version of your site.
 - For pages already live, you can still make edits. After editing, a new version of the page is created, and publishing will update the live site with the latest version you've worked on.

Live Training



What We've Covered

- **User types & roles:**
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Q&A



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THANK YOU

