Managing Organizations

VocFit.com

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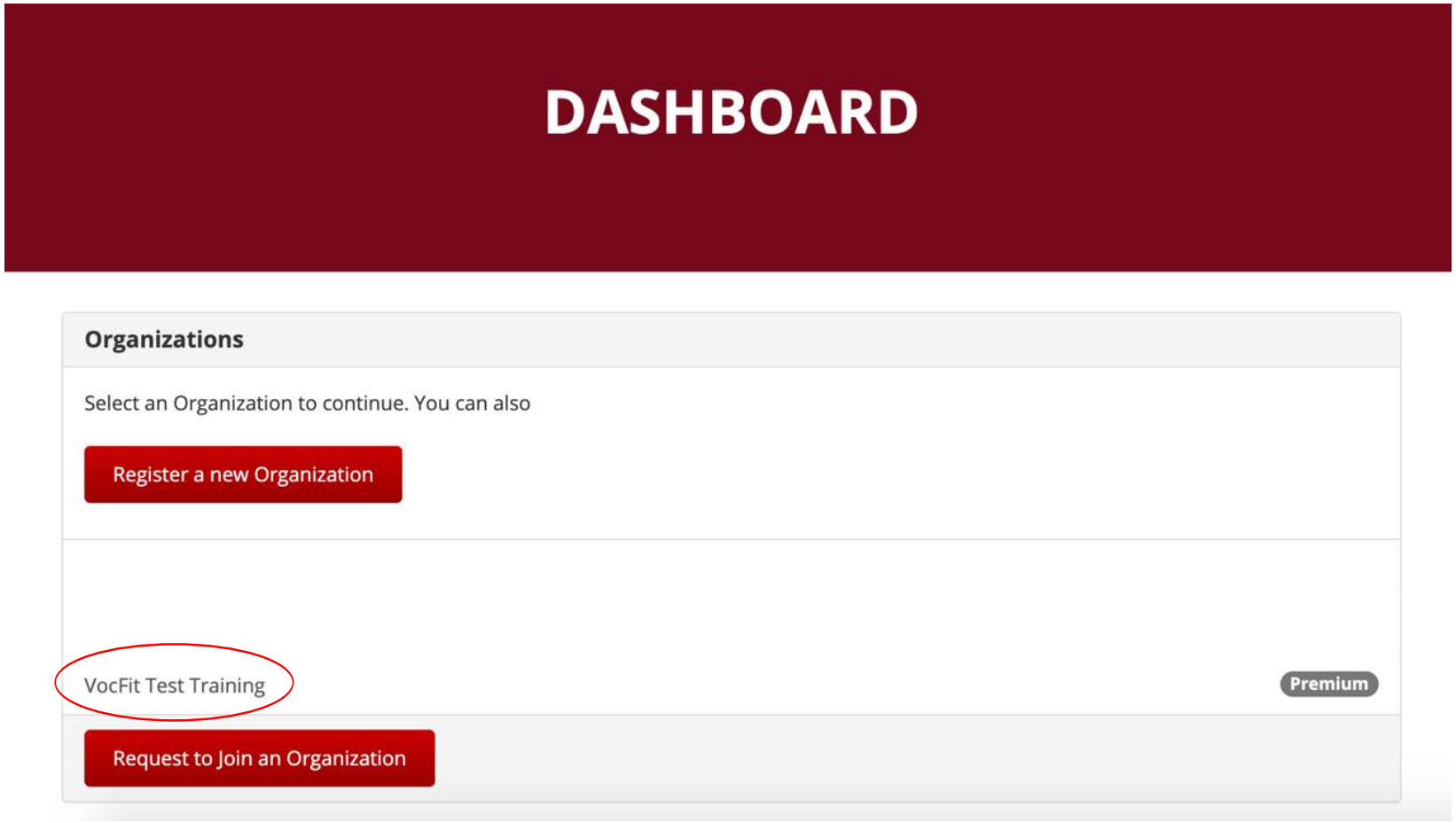
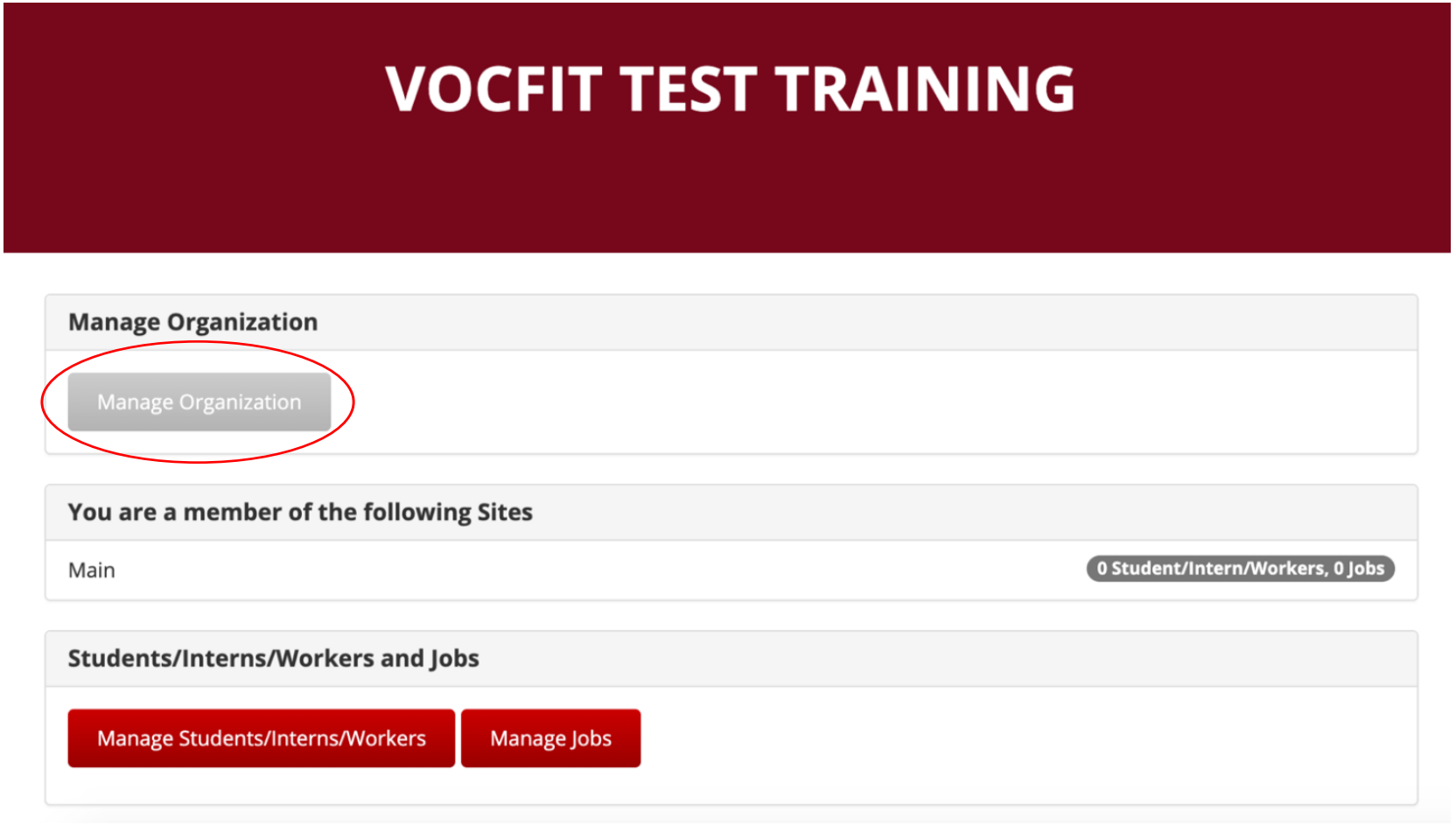
Overview

- Your organizations will be listed on your dashboard when you login to VocFit.com.
- Click on the name of the organization you want to access.



Overview

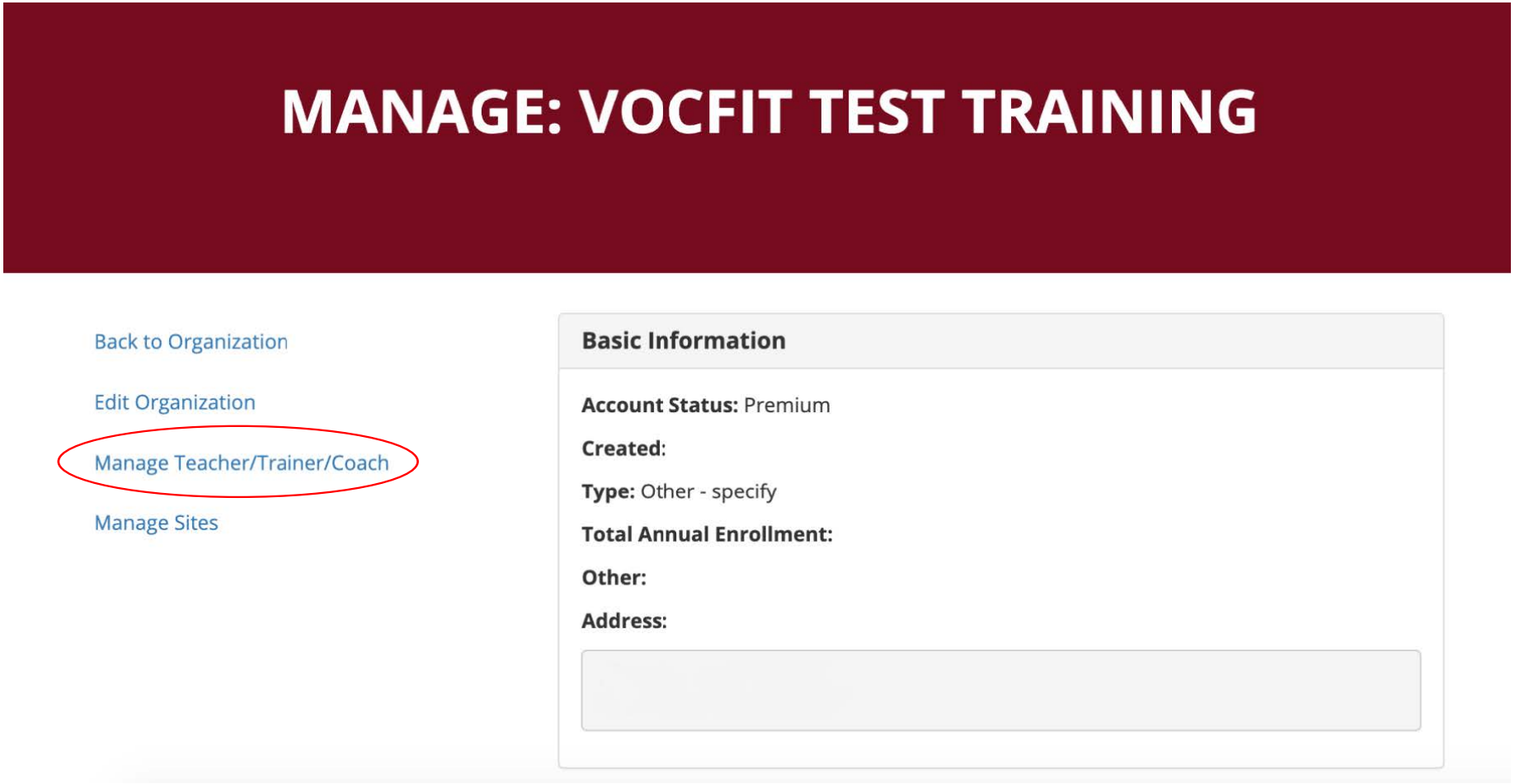


- To make any edits or updates your organization's information, users, or sites, start by clicking the "Manage Organization" button.
- In order to make changes, you need to be designated as an organization admin.

Adding, Editing, and Deleting Users in your Organization

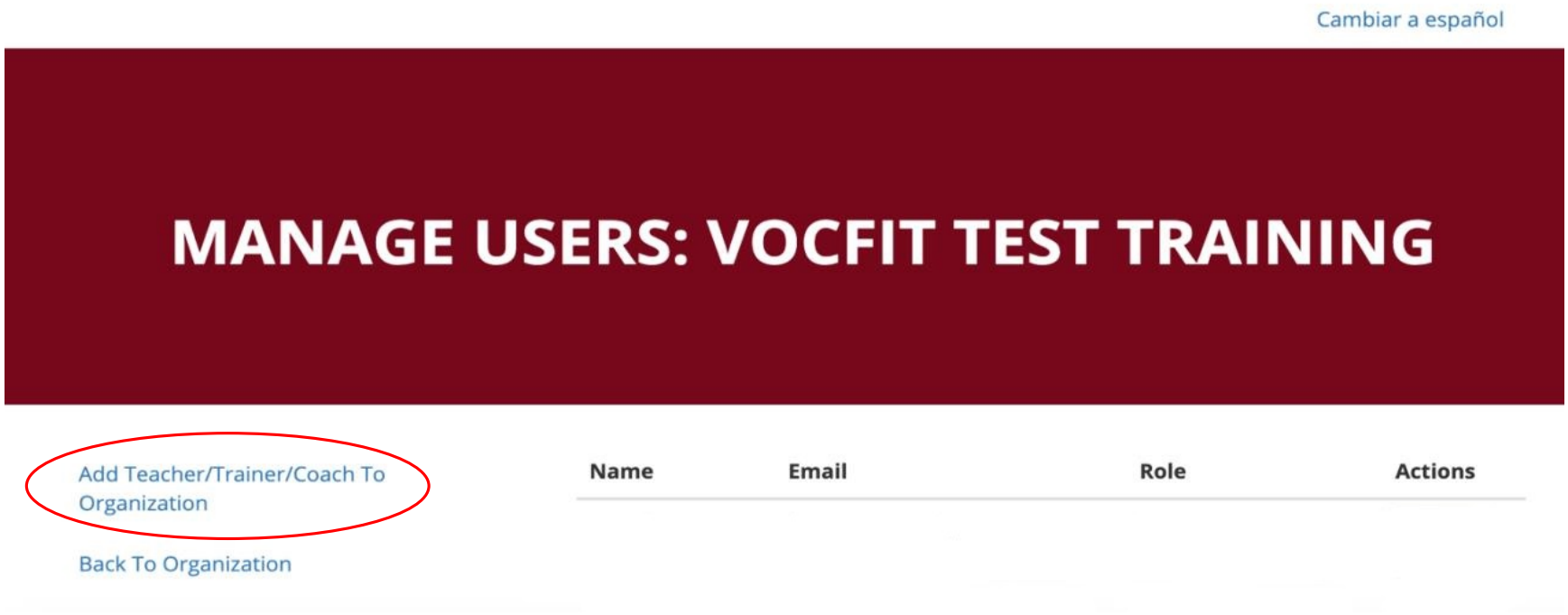
Click “Manage Teacher/Trainer/Coach”

- To add, edit, or delete users in your organization, click the “Manage Teacher/ Trainer/Coach” button on the left-side of the screen.



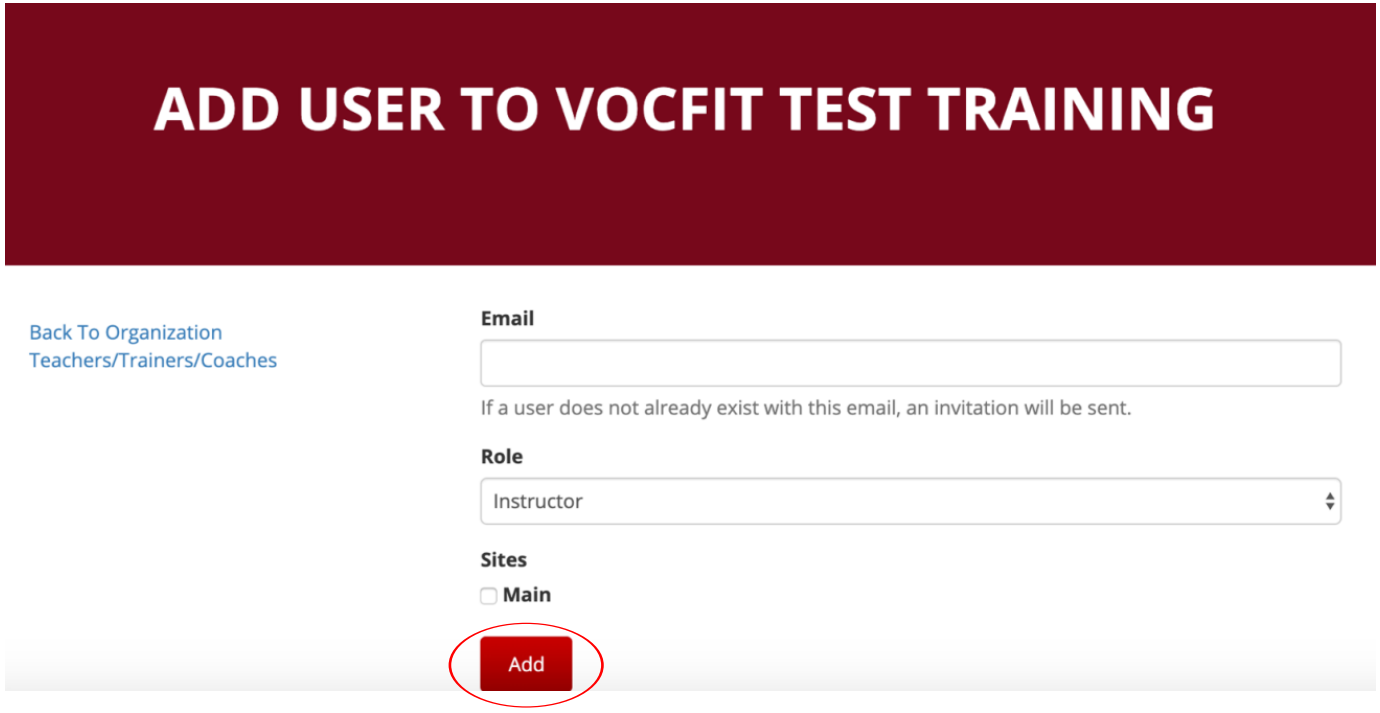
Adding a Teacher/Trainer/Coach

- You will be directed to the "Manage Users" page.
- To add new users, click “Add Teacher/Trainer/Coach to Organization” on the left-side of the screen.



Add User Information

- You will be directed to the "Add User" page.
- Enter the email of the person you would like to add. Make sure to enter the email they use for VocFit.com. If they do not have an account already, they will be sent an email to create one.
- Select the user's role:
  - **Instructor:** can create jobs, workers, and run job matching reports.
  - **Organization Admin:** can create jobs, workers, and run job matching reports, and can also add users and edit organization settings.
- Next, select all the sites you would like the new user to have access to.
  - If no sites are selected, the new user will not be able to access any data.
- To finish, click "Add".



MANAGE USERS: VOCFIT TEST TRAINING

Add User To Organization

Back To Organization

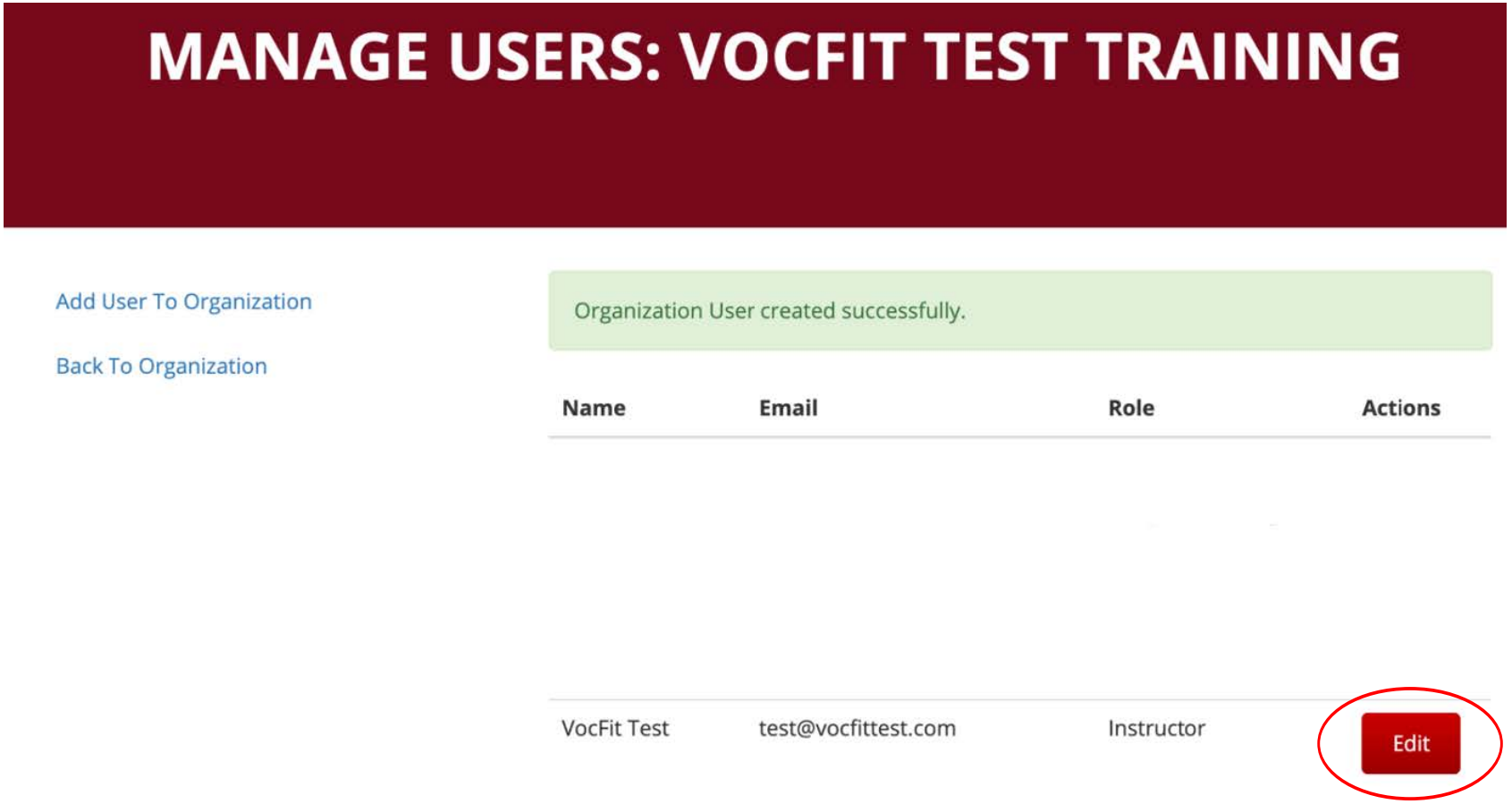
Organization User created successfully.

Name	Email	Role	Actions
VocFit Test	test@vocfittest.com	Instructor	Edit

- If the person was successfully added, they should appear on this list of users.
- If the new person does not have an account already, you will only see their email and role. Their name will be added once they create an account.

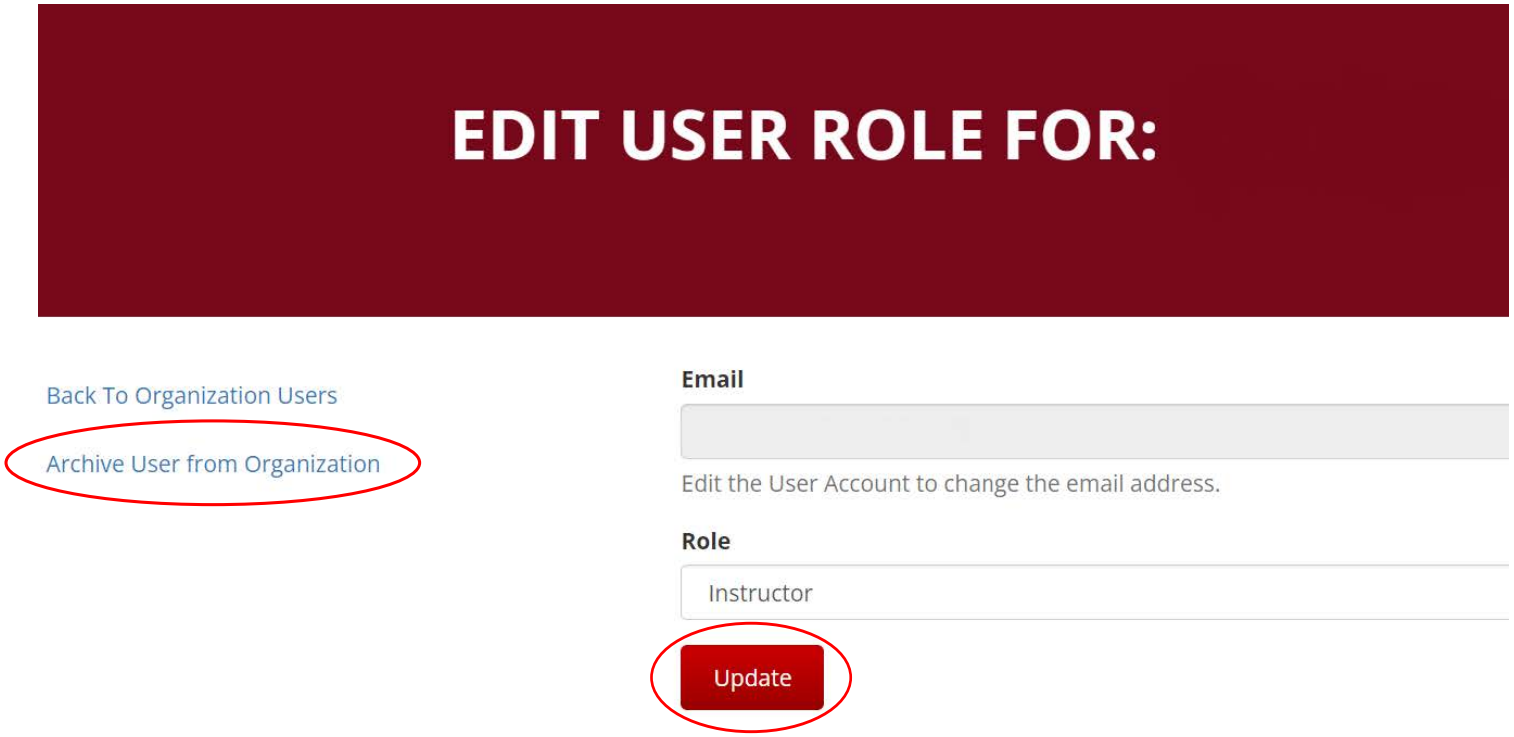
Editing a Teacher/Trainer/Coach

- Find the user you want to edit and click the "Edit" button on the right-side of the screen



Update or Archive Users

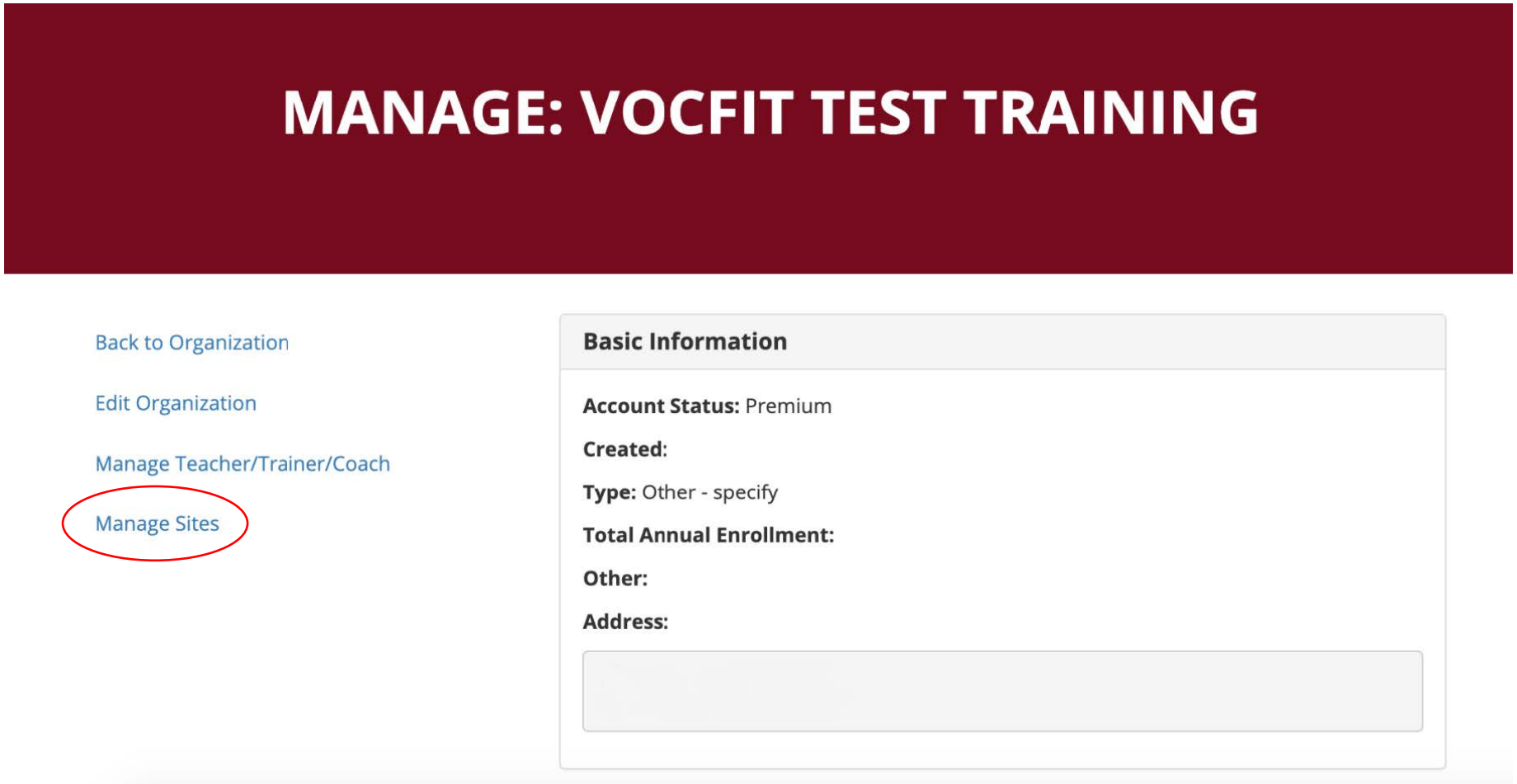
- You can edit the role of the user as either an Instructor or Organization Admin.
  - Click "Update" to save changes.
- You can also remove the user from your organization by clicking "Archive User from Organization".
  - This will not delete their account, but will remove them from your organization and prevent them from accessing your organization's data.



Adding, Editing, and Deleting Sites in your Organization

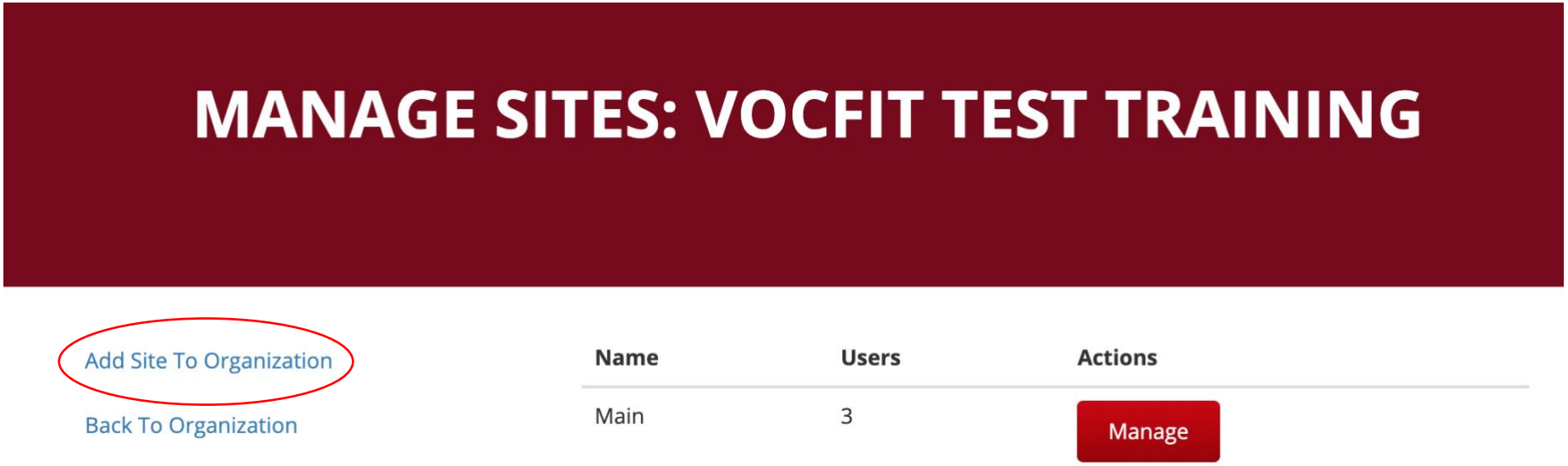
Click “Manage Sites”

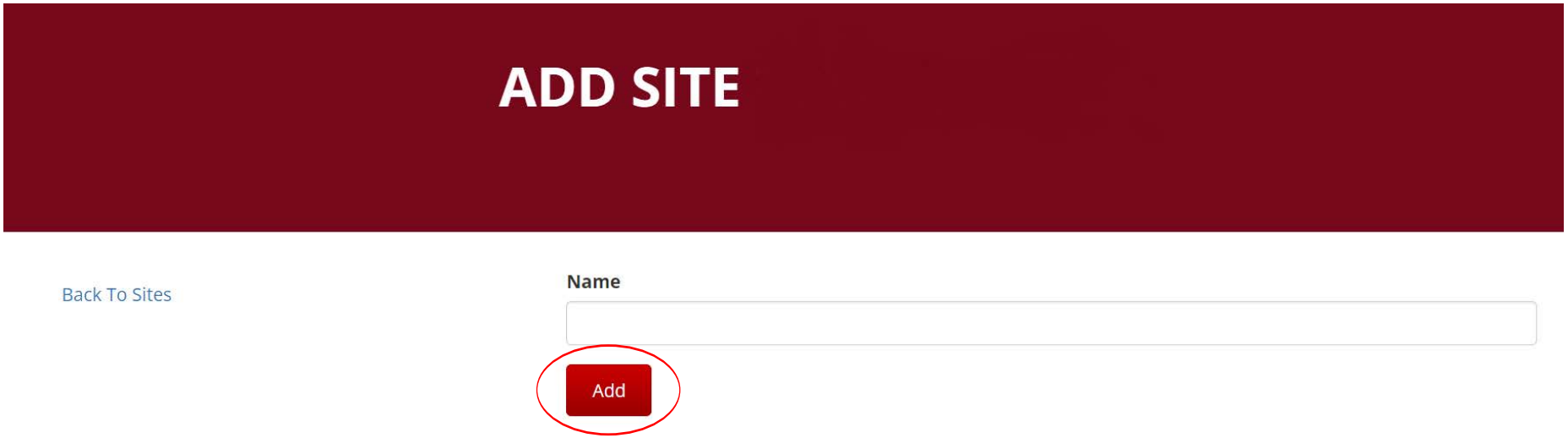
- When you create an organization, a “Main” site is automatically added. However, you have the option to add more sites to your organization.
    - This may be useful if you have multiple classrooms, locations, or supervisors.
- To add, edit, or delete a site in your organization, click “Manage Sites” on the left-side of the screen.



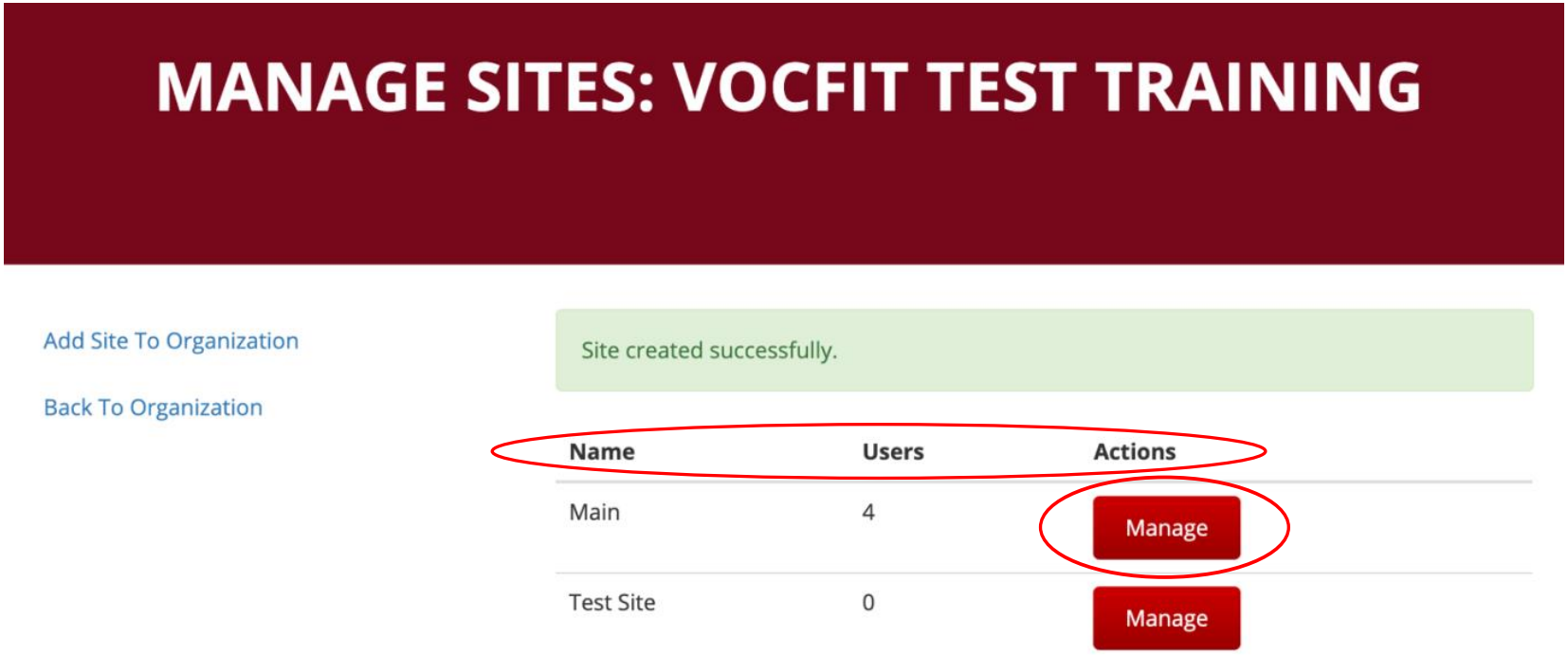
Adding a Site to your Organization

- To add a site, click “Add Site To Organization” on the left-side of the screen.
- On the next page, enter the name of your new site and click "Add".





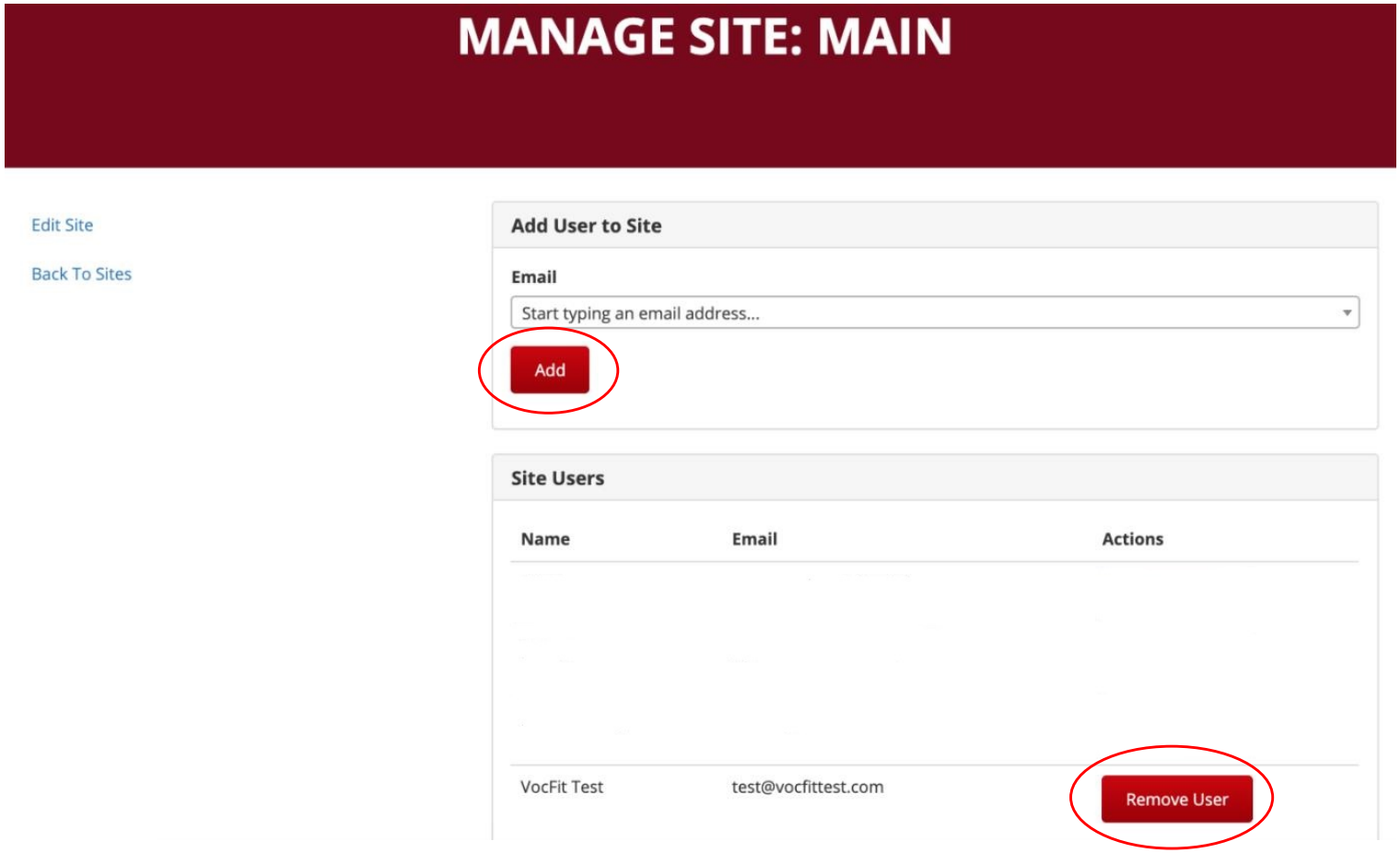
Managing your Sites



- The "Manage Sites" page allows you to see the names, users, and actions associated with your sites.
- Find the site you want to manage and click the "Manage" button on the right-side of the screen. This will allow you to:
    - Add/Remove users from the site.
    - Edit/Archive the site.

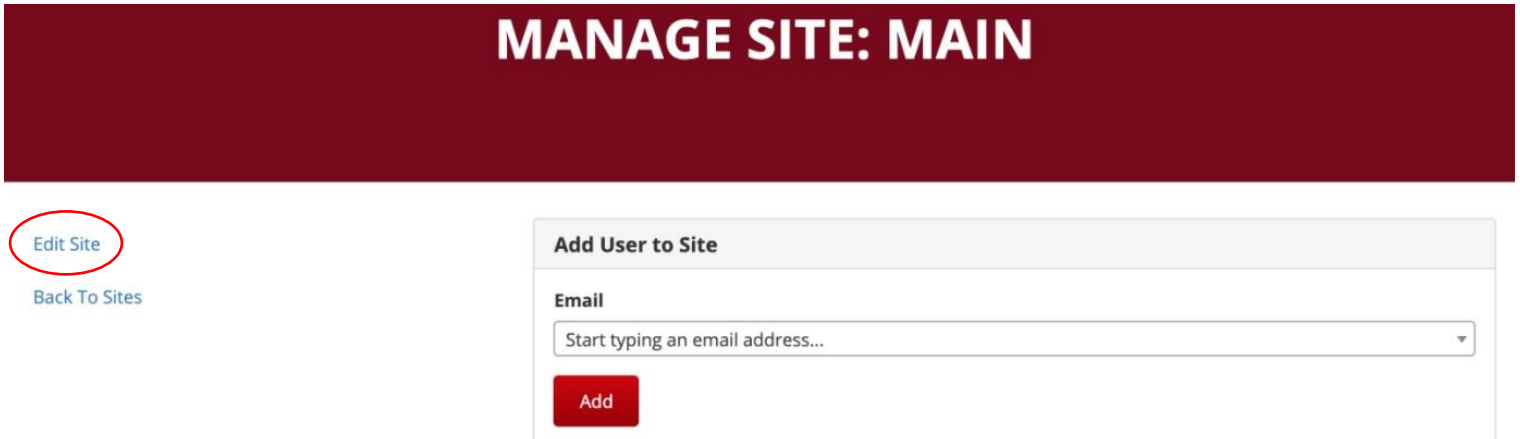
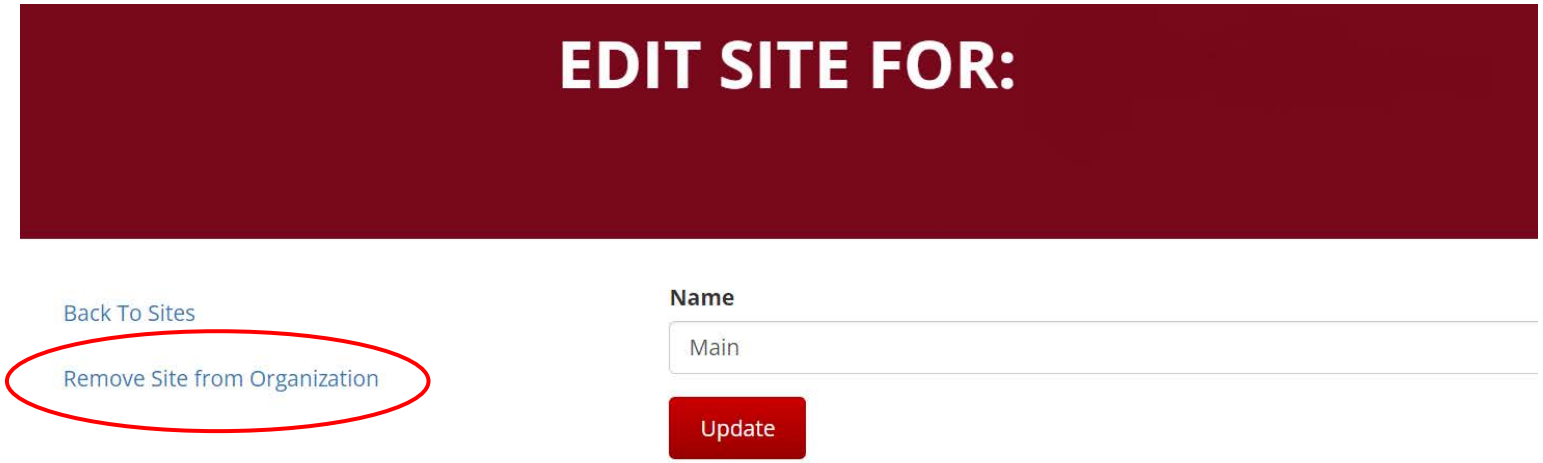
Adding/Removing Users in your Sites

- After clicking "Manage", you will be directed to this page.
- You can add users to the site by typing in their email address. Eligible users should appear in the drop-down menu as you type.
    - You can only add people if they are part of your organization already.
    - See instructions above for help with adding users to your organization.
- You can also remove current users by selecting “Remove User” next to their name.



Editing and Removing Sites

- You can also select “Edit Site” on the left-side of the screen to further edit the details of this particular site.



- From there, you can update the name of your site.
- You can also delete the site by clicking "Remove Site from Organization" on the left-side of the screen.