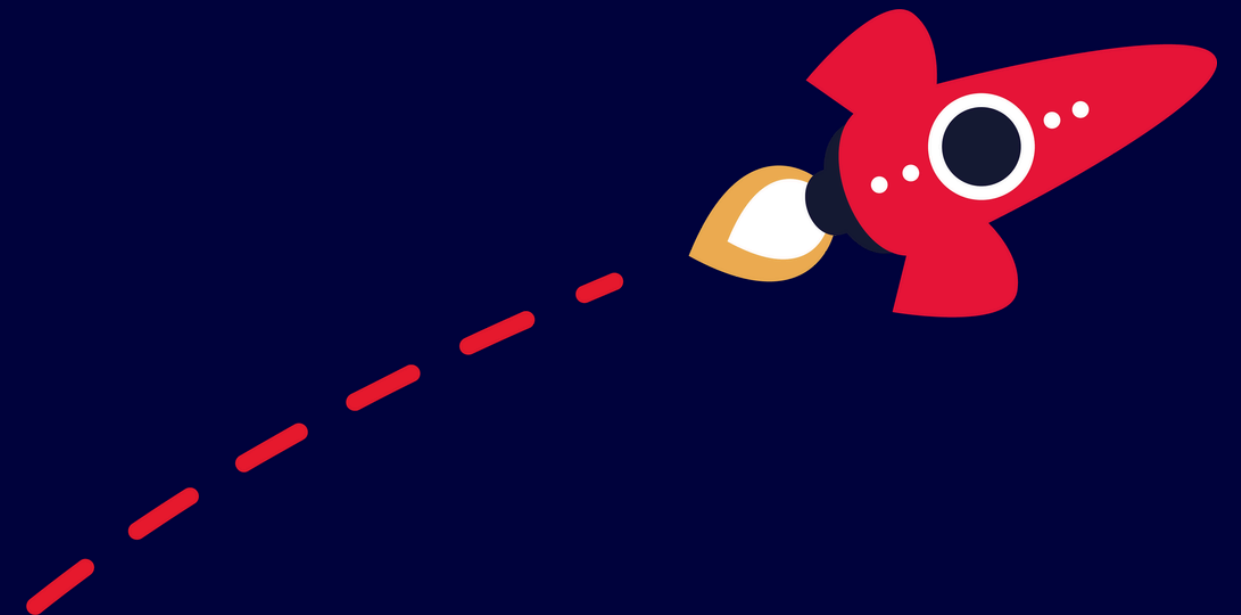
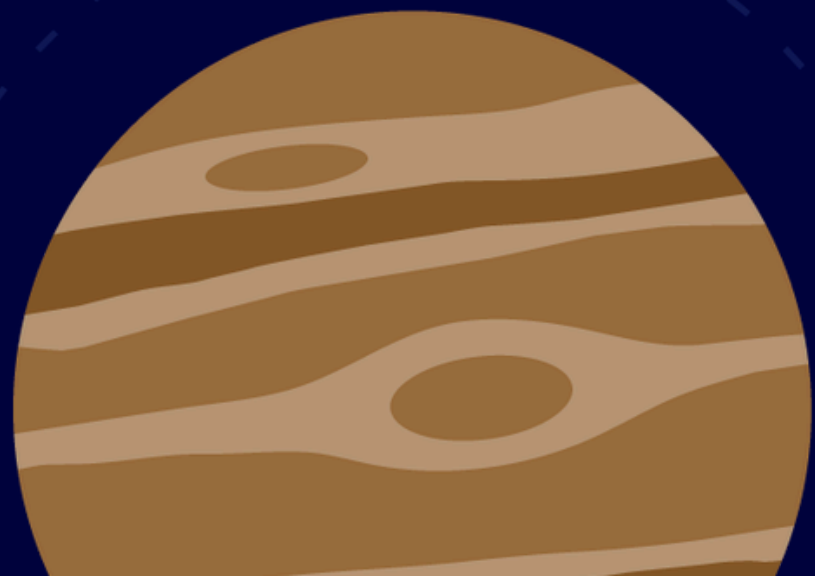


New admin readiness checklist for Super Admins

Use this checklist whenever a new admin joins your team
to make sure they're set up for success from day one!



1. Prepare their access

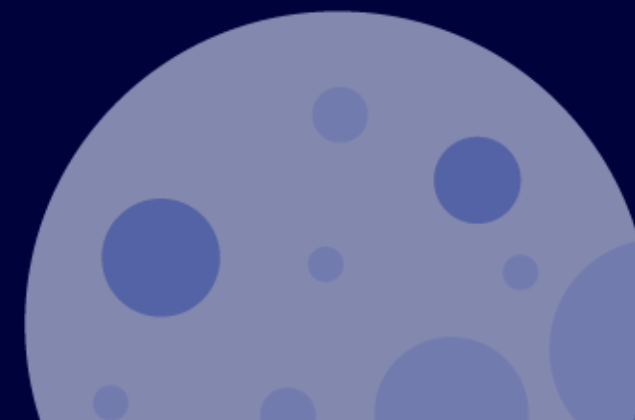
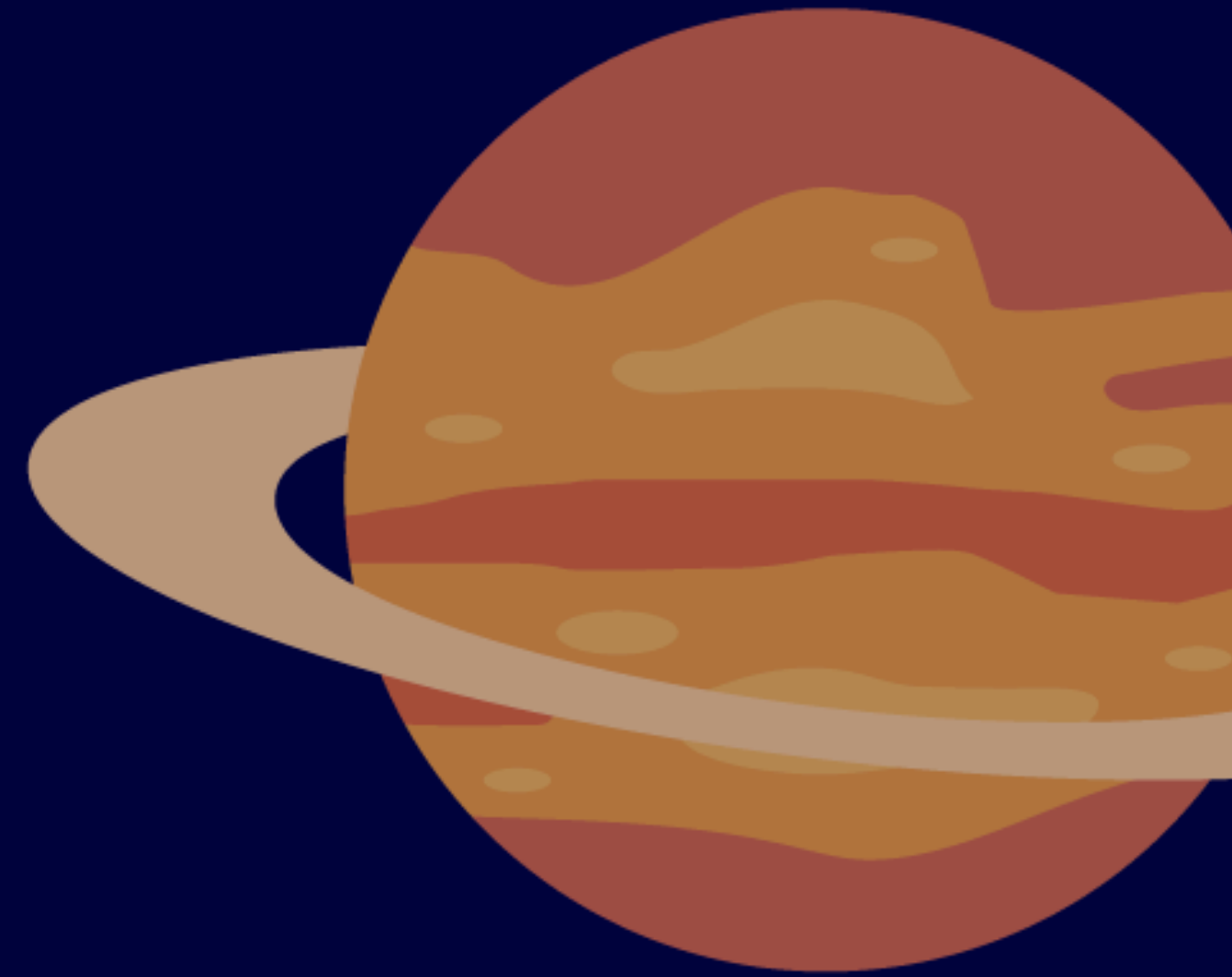
Can they log in successfully?

- Create their User account
- Assign the correct Administrator Role(s)
- Check they can successfully log in
- Explain how to reset their password
- Review your organisation's password policy

2. Give them a great starting point

Reduce the time it takes them to find their feet.

- Share relevant Dashboard Areas
- Share useful DataGrid Views
- Share commonly used DataGrid Filters



3. Simplify their experience

Revisit: does your platform reflect the way your team works?

- Review whether unnecessary form fields have been hidden
- Confirm mandatory fields capture the information you need
- Check naming conventions are consistent (i.e. Files, Courses, eLearning packages)

4. Introduce your processes

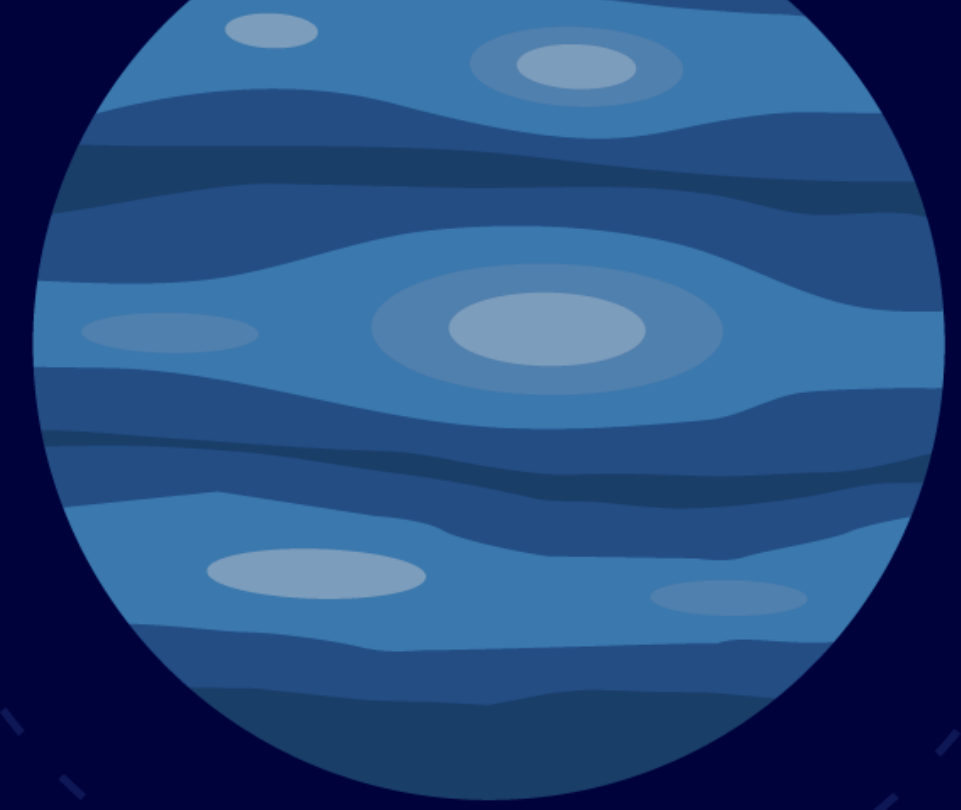
Training on how your platform fits into their role

- Confirm they understand the platform navigation
- Show them where to access Help & Knowledge Base resources
- Explain your end-to-end booking process
- Share any internal process documentation
- Explain how your team uses DataGrid Views and Dashboards
- Highlight any reports they should regularly review

5. Set expectations

Help them understand what 'good' looks like

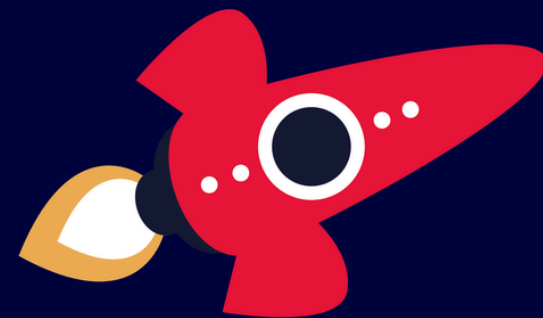
- Explain your data quality standards
- Show examples of well-maintained records
- Explain who to ask for support
- Introduce any internal platform champions



Reflection questions

Does your onboarding experience answer these new admin questions:

- ✓ Where should I start each morning?
- ✓ Which Dashboard should I use?
- ✓ Which DataGrid Views should I use?
- ✓ Which information is important to complete?
- ✓ Which reports should I look at?
- ✓ Where can I find help?
- ✓ Who do I ask if I'm unsure?



Top Tips from our Implementation Team!



Standardise where possible

If everyone follows the same process, it's easier to train and support your team.

Review your platform regularly

Your organisation changes over time, and your platform should too.

Set new admins up with shortcuts

Give them a strong starting point with shared Views, Filters, and Dashboard Areas