

Scoir Guide

User Management



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Scoir Users and Roles

Within Scoir there are different user roles that connect to our college enrollment solutions. In order to access and utilize enrollment solutions, users must have the correct roles enabled. Each institution should have **one** Account Administrator assigned from within their office. Your **Account Administrator manages roles within your account and can add/remove users and modify roles and permissions.**

If you are the Account Administrator for your institution, this guide is for you. You will find information on managing your Scoir account, adding/removing users, and adjusting user roles.



If you believe you should have access to a particular role, reach out to the Account Administrator on your team or contact your Scoir Customer Success Manager!



Pro Tip:

Review users annually!
Confirm that all of your
Scoir users are active
and have the appropriate
roles.

Understanding Users and Roles

Account Administrator

We recommend that only one user have access to this role

- ☐ Add/remove users
- ☐ Modify users' permissions
- ☐ Control Scoir account settings
- ☐ View Scoir college profile
- ☐ Configure integrations

Admissions Operations

- ☐ Download supporting documents
- ☐ Modify delivery preferences
- ☐ View Scoir college profile

Admissions Representative

Most of your users will have access to this role

- ☐ Explore high schools
- ☐ Schedule visits
- ☐ View Scoir college profile

Application Round Manager

We recommend that only one user have access to this role

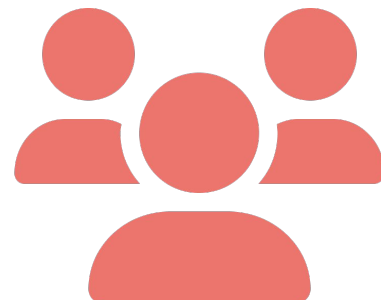
- ☐ Create/edit application deadlines
- ☐ Modify application requirements
- ☐ View Scoir college profile

Content Manager

- ☐ View Scoir college profile
- ☐ Manage CMS

Student Outreach

- ☐ Manage college outreach messaging to students and parents/guardians



Add New Users

- Log into your Scoir account
- Navigate to **Users** by clicking on the Welcome dropdown at the top right
- Select **+Add New User**
- Add user information
- Be sure to check the box to mark the user active and send email invite immediately.*
- Click Continue
- Set Roles
- Select Done



Note: To change roles for any user, simply select **Edit** next to the appropriate user and toggle on/off the roles you'd like to add/remove.

*** Need to re-invite someone?**

- Check the box next to user
- Click 'I would like to..'
- Select invite staff

Delete and Inactivate Users

To delete a user:

- See if user has any high schools visits scheduled*
- Log into your Scoir account
- Navigate to **Users** by clicking on the Welcome dropdown at the top right
- Select Delete next to the appropriate user
- Select Yes to confirm deletion

To mark a user inactive:

- Select Edit next to the appropriate user
- Uncheck the box next to **'Is this staff an active member?'**

** Before deleting a user, it's important to check to see if they had any high school visits scheduled. It's best practice for the departing user to address these visits with the high schools directly.*

Alternatively, the departing user should provide their supervisor with a list of visits, which the supervisor can reschedule with the appropriate high schools.

High schools will need to swap out the reps or remove the visits on their end; colleges are not able to do this directly.

Additional Resources

Here are some additional resources to use to get the most out of Scoir. If at any point you have questions, reach out to your Customer Success team!

- The number of high schools using Scoir grows almost every day. [View the high schools connected to Scoir here!](#)
- Visit the [Scoir Blog](#) to discover the Scoir podcast, insights into admission, the application process, higher ed industry and more.
- Sign up for the [What's New in Scoir](#) mailing list to receive email notifications whenever Scoir releases new features.
- Don't forget, you have access to our [Help Center](#) if you need assistance with any Scoir features.
- Check out our other **educational resources**:
 - ◆ [Content Management Guide](#) and [video](#)
 - ◆ [Recruitment Guide](#) and [video](#)
 - ◆ [Messaging Guide](#) and [video](#)
 - ◆ [Yield and Junior Recruitment Guide](#)

