CoSchedule

5

Get CoSchedule Ready For Your Team



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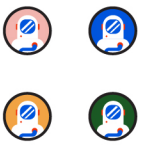
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Launching CoSchedule Checklist

Before you invite your team to use CoSchedule, there are a couple things you should set up to make the transition go smoothly. Use this checklist as you walk through the lessons in this chapter to help get CoSchedule set up for your team.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Set user roles.**	Use the example provided to set user roles for each of your team members.	
2	☐	**Create a read-only link.**	Use the read-only option to create shareable links for stakeholders.	
3	☐	**Invite a team member to CoSchedule.**	Enter a team member's email address and assign them user role.	
4	☐	**Customize someone's app permissions.**	Use the best practice guidelines to create a customized app experience for a team member.	

Introduction

What is this guide? This lesson covers what you should know & do before inviting your team to use CoSchedule.

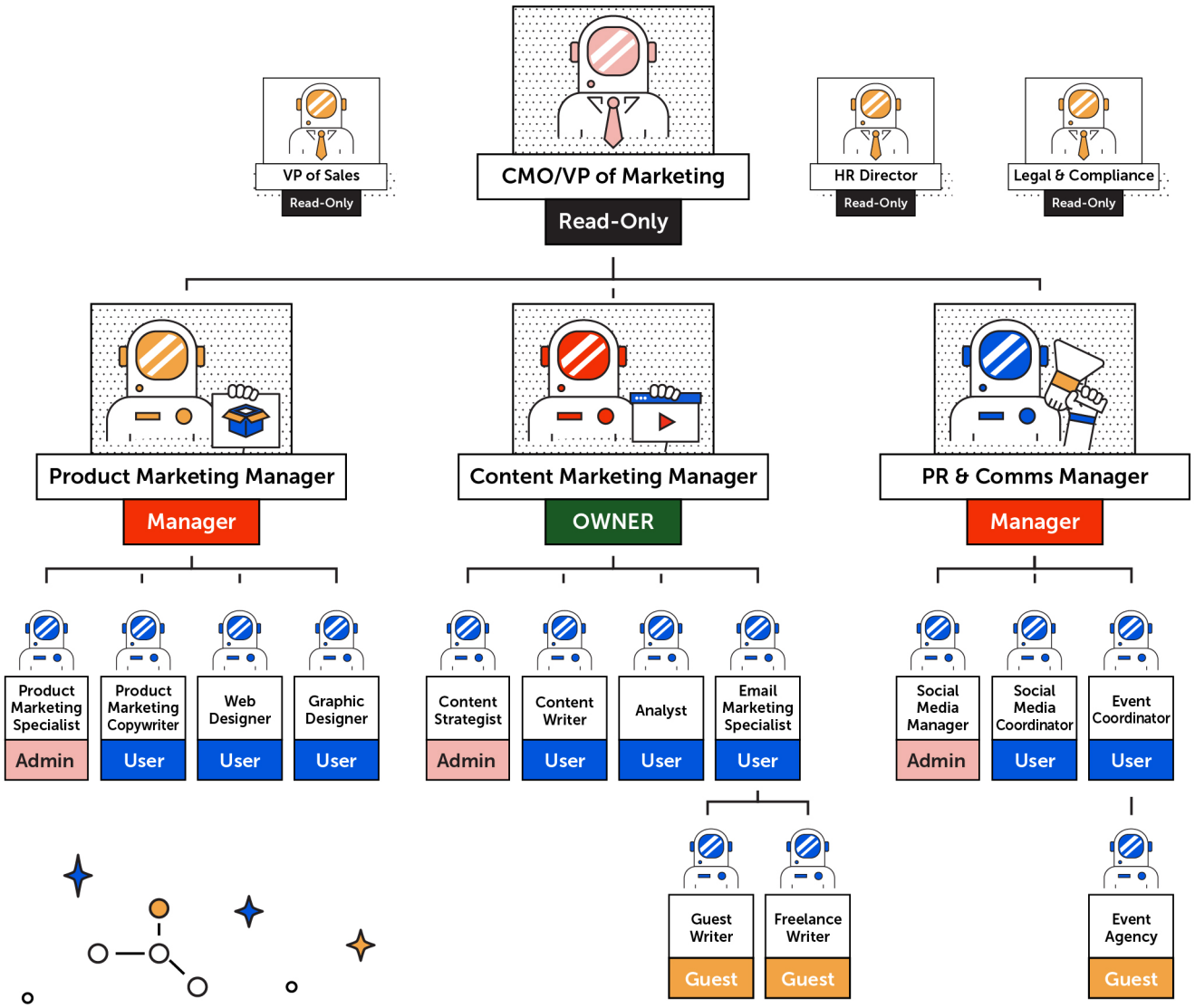
Who's this guide for? New CoSchedule champions that will be implementing CoSchedule for their marketing team.

What you'll learn:

- Inviting team members to CoSchedule.
- Types of user roles and use cases for each.
- How (and when) to use read-only views.
- Setting team permissions for each member.

User Roles in CoSchedule

User roles allow you to limit what certain users see in CoSchedule. It's a good idea to sketch out who on your team will have which roles before you start. Here's an example to illustrate how each role could be implemented in a marketing team. There are five user roles in CoSchedule: Owner, Manager, Admin, User, and Guest.

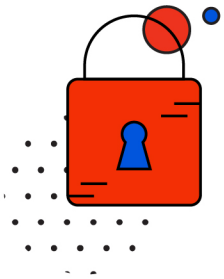


Owner

An owner in CoSchedule is the individual with the highest access rights. It is likely the person who started the CoSchedule plan and initiated the purchase. There is only one owner per account.

This individual can:

- Can change subscription plan, update billing information, and delete calendars.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, including the ability to delete profiles from your company.
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Owner Access Rights?



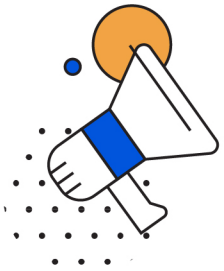
This individual will likely be the CoSchedule champion who is implementing the tool for their team. (i.e. you!)

Manager

Managers have the same access rights as an owner. However, the owner can rescind rights from the manager as necessary. You may want to assign a team member these rights to assist you with managing the account in the event that you are unable to access the account due to travel, etc.

These individuals can:

- Can change the subscription plan and update billing information.
- Cannot assign other team members as Managers.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, including the ability to delete profiles from your company.
- Can administer team members, including the ability to delete team members from your company.
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Manager Access Rights?

- One or two individuals that are perhaps marketing strategy leads - These are individuals you trust to manage billing aspects of your CoSchedule account.
- These are likely your power users of CoSchedule.

Admin

Individuals with admin access can...

- Cannot assign other team members as Managers.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, excluding the ability to delete profiles from your company. (Only owners and managers can permanently delete a social profile from the entire company.)
- Can administer team members, excluding the ability to delete team members from your company. (Only owners and managers can permanently delete a team member from the entire company.)
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Admin Access Rights?

- The Social Media Manager (or similar) - They need access to the calendar settings to be able to pause all social media messages in the event of an emergency.
- Team leads who do not have Manager rights, such as Content Strategists and Product Marketing Leads.
- Team supervisors.

User

Individuals with user access can...

- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.



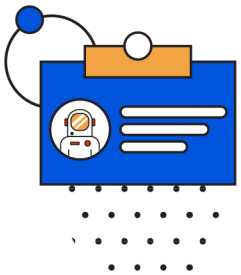
Who Should Have User Access Rights?

- Most of the people on your team will have user access rights.
- Writers, graphic designers, coordinators, etc. Basically the specialists or contributors on your team that execute marketing tasks.

Guest

Individuals with guest access can...

- Can view and edit projects only if assigned to them.
- Can complete tasks assigned to them.

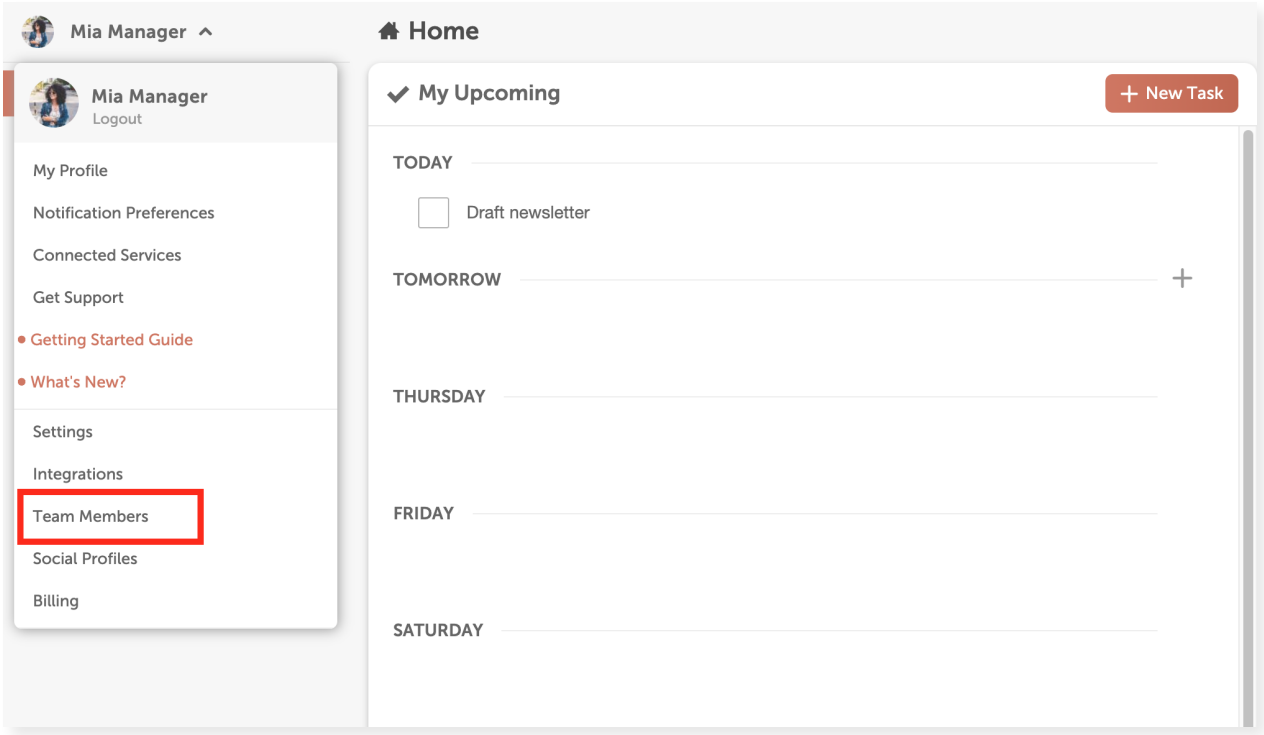


Who Should Have Guest Access Rights?

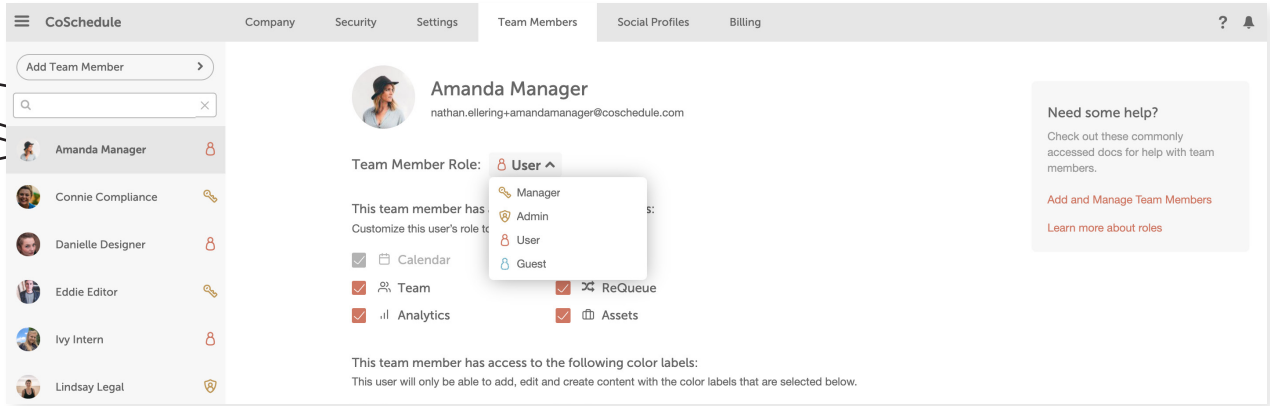
- External writers.
- Freelancers.
- Event Agencies.
- Vendor partners.

Where to Set User Roles for Your Team

When you're ready to start inviting your team members to CoSchedule, user roles can be set by toggling down your name in the left-hand corner and clicking the "Team Members" option.



Click the pencil next to the team member you want to edit and use the drop down list to choose the user role you want to apply to the individual.



Read-only Views in CoSchedule

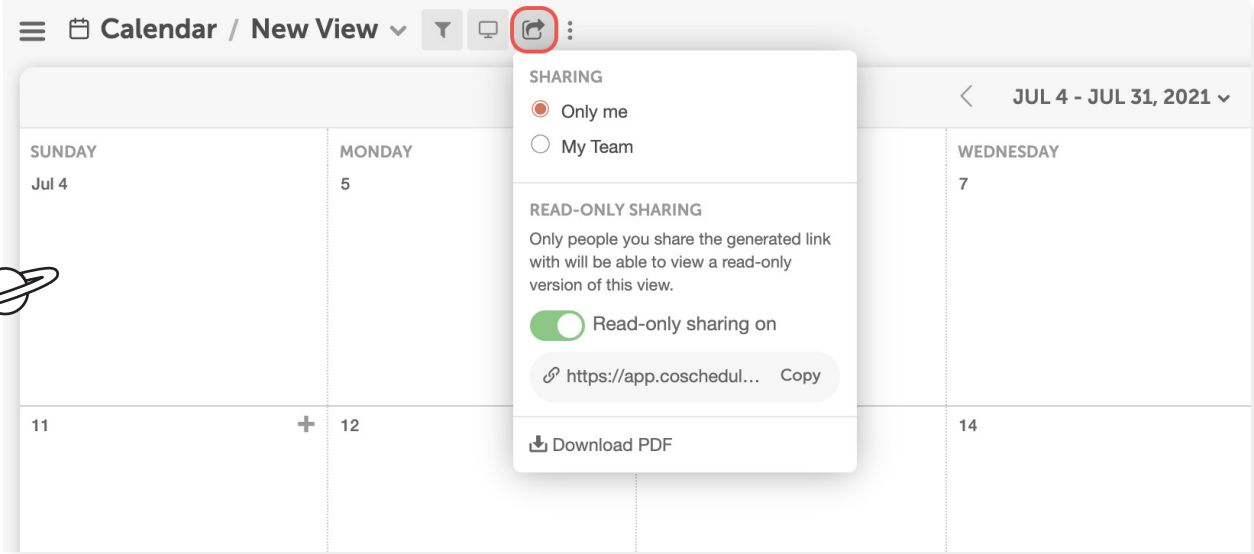
You likely have a few stakeholders that require regular updates on what your team is working on. CoSchedule makes it easy to keep everyone in-the-know and prove the value of your team with read-only views.

This means people can have access to see certain marketing projects or campaigns, but can't make changes, edit, or reschedule.

The best part about read-only views is that stakeholders can see what's going on, but you don't have to pay for an extra user in CoSchedule.

How to Create a Read-only View

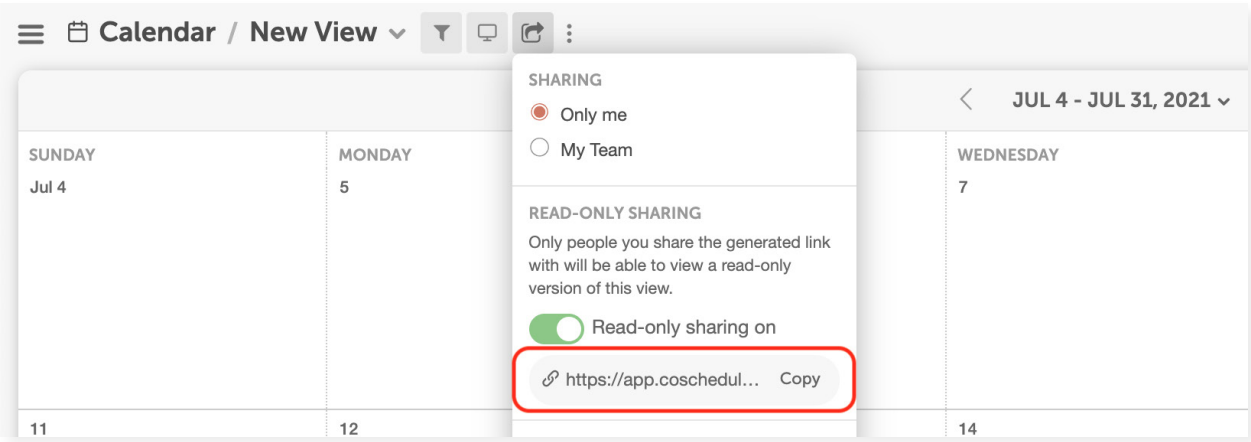
Read-only views are created by clicking the share icon in the top left section of your calendar.



There are two different versions of the read-only view that can be shared.

1. **A shareable link** that gets updated in real-time, so your stakeholders always have the most up-to-date details.
2. **A downloadable PDF** that is best for printing, but won't automatically update when changes are made.

To create a shareable read-only link, click the button next to the "Read-only sharing on" text. Next, click "Copy" to copy the link and send it to anyone who needs to stay updated about what your team is working on.



If you don't want someone to have access to that link any longer, simply break the link by toggling off the "Read-only sharing on" text.

To create a downloadable PDF, click the "Download PDF" text located under the shareable link.

When to Use a Read-only View

Here are a few awesome use cases to make the most of out read-only views.

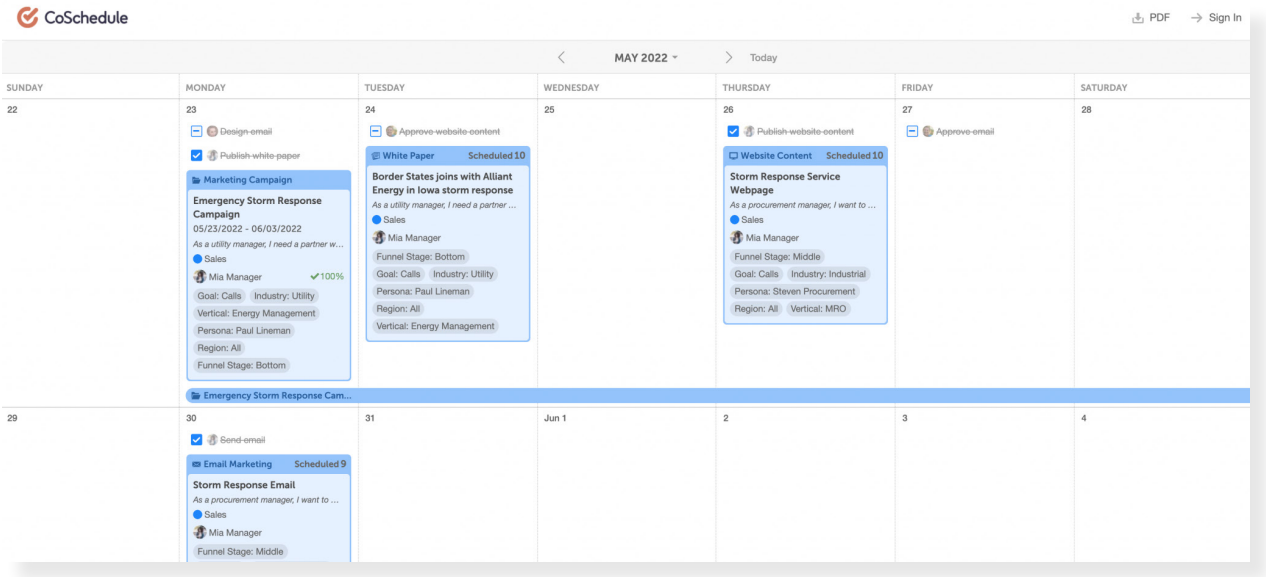
Keep the Sales Team Updated on Deliverables

If your team is responsible for producing materials on behalf of other departments, creating a read-only view is a great way to cut down on status updates and keep people in that department updated on projected timelines.

For instance, if your team regularly creates sales collateral for the sales department, choose to create a read-only link based on the "Sales" saved view.

This will ensure that the sales team only has access to view the projects that are relevant for them.

Here's an example of what the sales read-only link will look like to someone on the sales team:



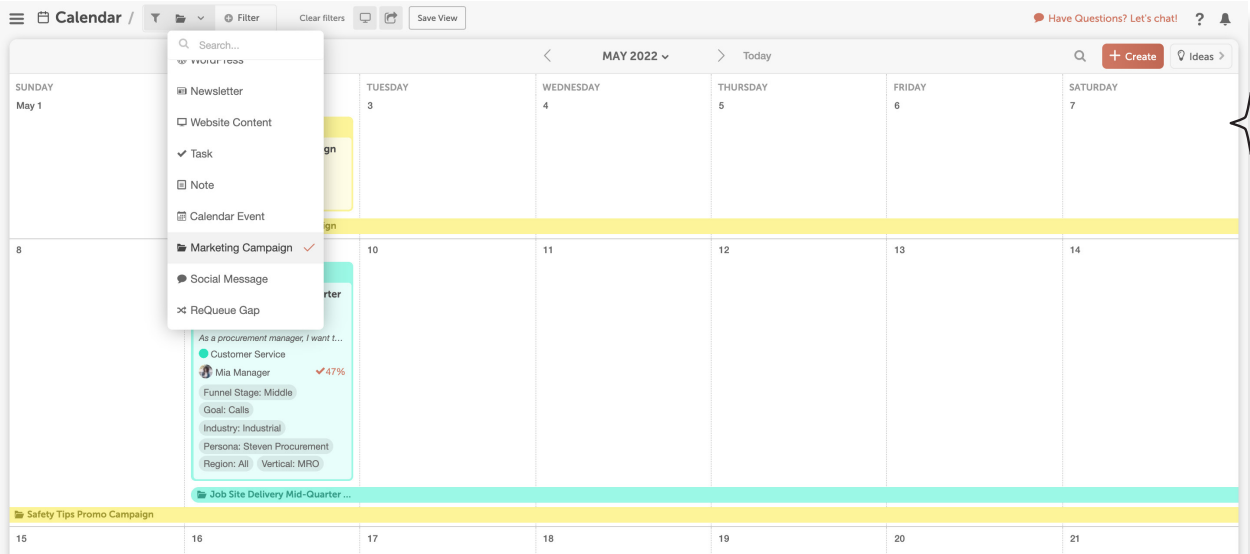
This cuts down on the time it takes you to manually provide updates. Individuals can self-serve and see exactly when their projects will be done and what progress has been made so far.

Show Your CMO/CEO All Scheduled/Planned Marketing Campaigns

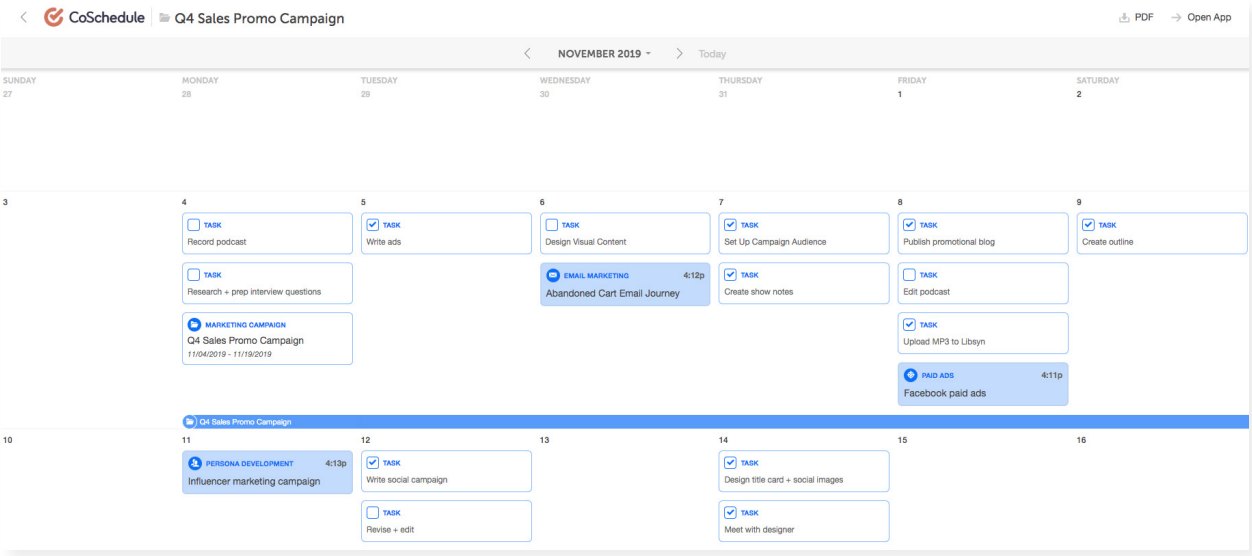
Say your CMO wants to stay updated on the progress of every marketing campaign your team launches.

Create a read-only link from a “Campaign Timelines” saved view. This allows the CMO to quickly see when each campaign will launch and all the individual projects which the campaign is comprised of.

To create a Campaign Timelines view, click the filter icon to filter by “Project Type,” then select “Marketing Campaign. Once you save this view, you can select the share icon to copy or download the read-only link.



For more details about the campaign, the read-only link allows the user to click into each campaign to see individual projects, tasks, and content.



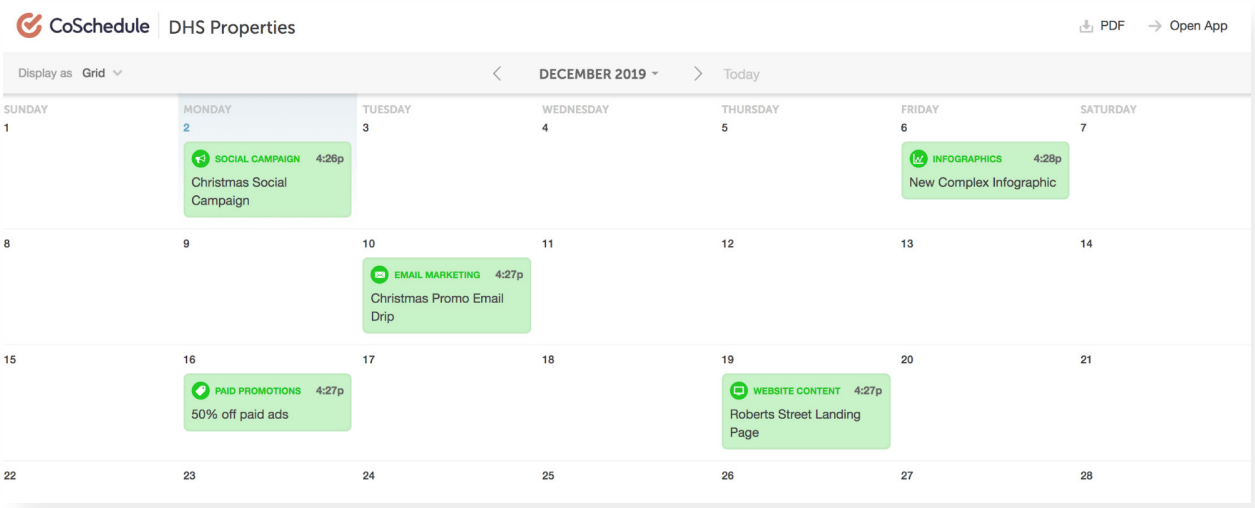
Share Planned Work on Behalf of Clients

Keep clients in-the-know by giving them a read-only link to quickly see all the things you're working on including marketing initiatives, social media, or email marketing.

Share a read-only link with a client based on the color label saved view you created in an earlier lesson. Missed that lesson?

No problem. You can re-read it here.

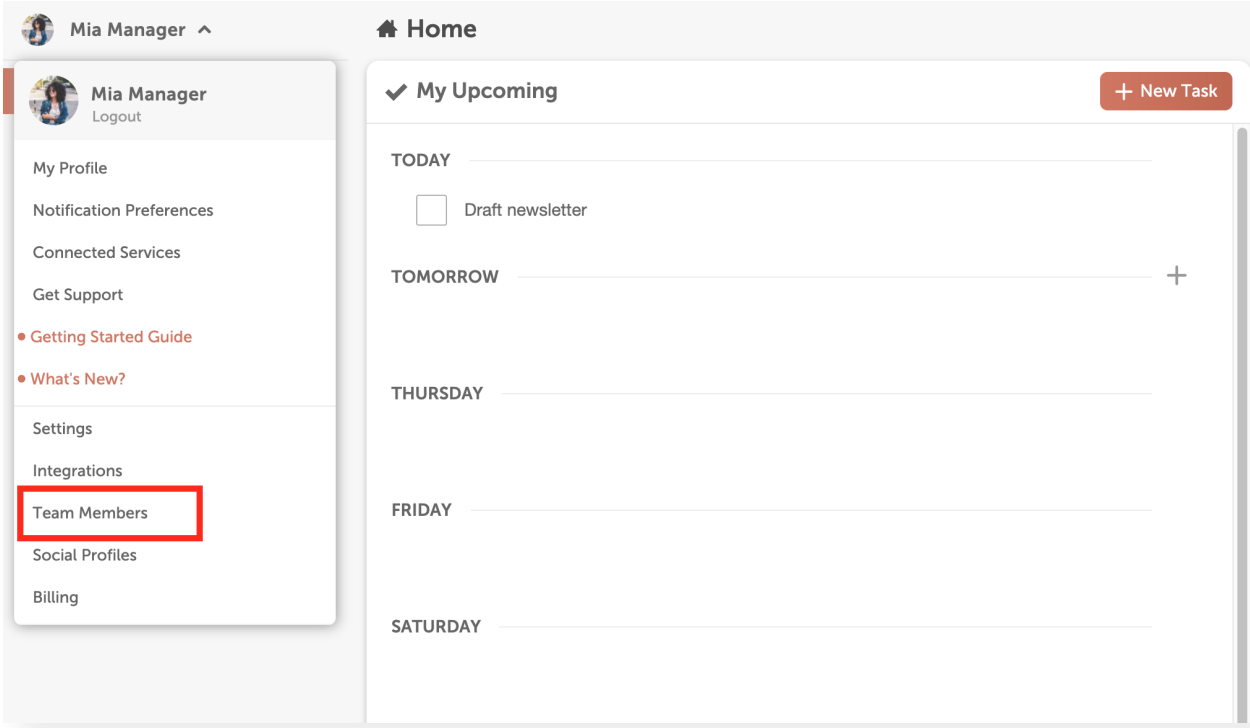
This allows your clients to quickly approve content, see timelines, and give feedback about deliverables.



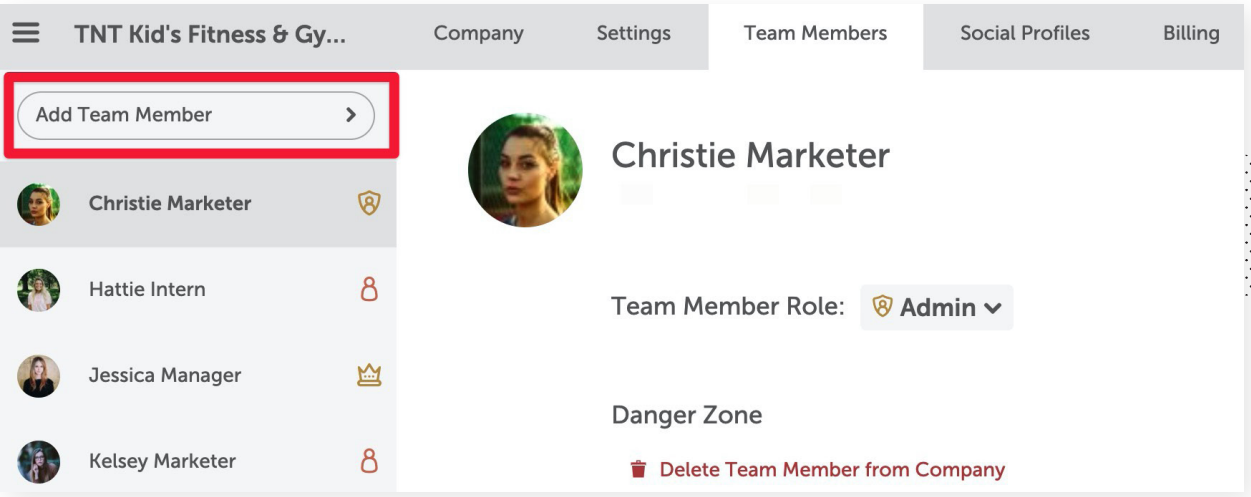
Inviting Your Team to Use CoSchedule

Now that you've got some of the basic things set-up in CoSchedule, it's time to start inviting your team members to use CoSchedule.

Inviting team members is easy – simply toggle down your name and chose the "Team Members" option from the drop-down menu.



From here, click the "Add Team Member" button to add a new team member to your calendar.



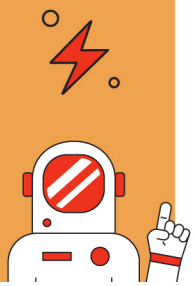
Enter the individual's email and choose their user role based on their needs.

Setting User Permissions

Once you've added your team members and they've accepted the invite, you can customize which parts of CoSchedule each person has access to.

There are a couple of reasons you'll want to do this:

1. It allows you to set boundaries based on roles and responsibilities.
2. It gives each team member a custom view of CoSchedule that only has the features they care about.



FYI

Keep in mind that only those designated as "Users" can have customized app permissions. "Admins" get access to everything and "Guest" users only have access to the calendar.

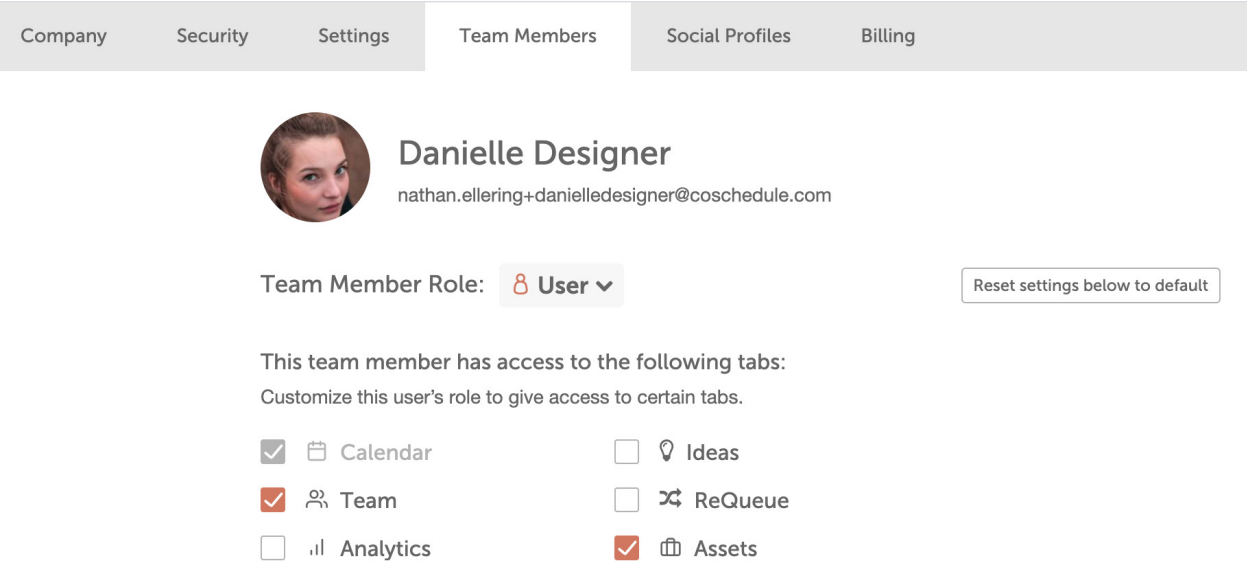


Here are some best practice suggestions for each member of your team:

Graphic Designers

Use Case: Graphic designers use CoSchedule to manage their daily workloads, submit their work and monitor projects for changes and approvals, but things like analytics and the Ideas Board aren't relevant for them.

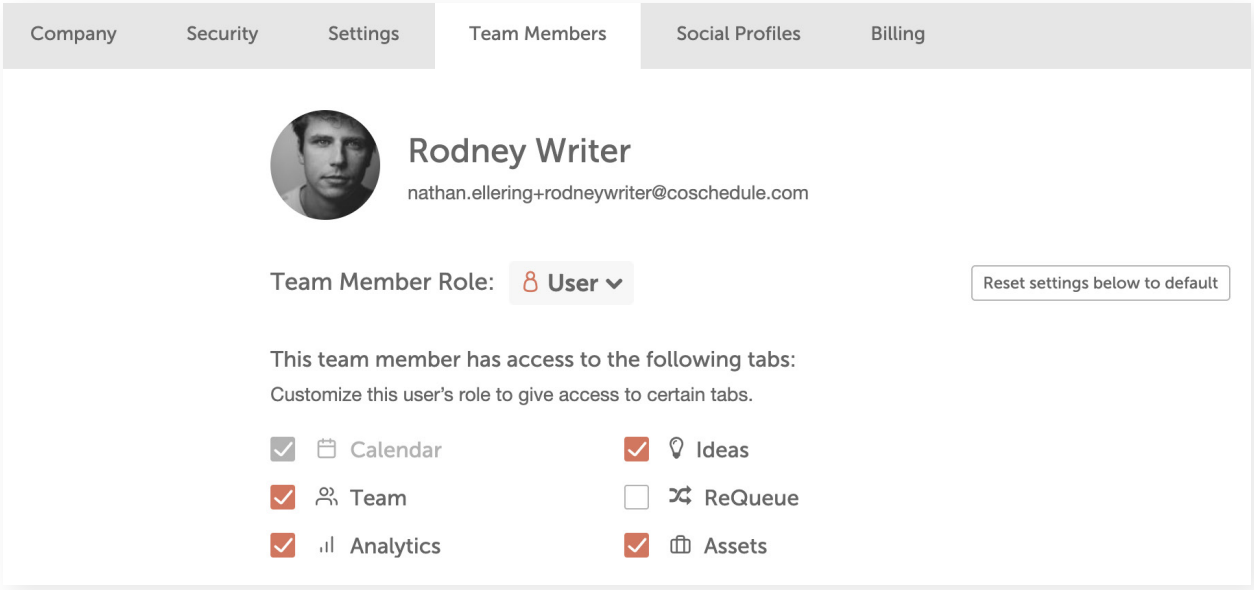
Best Practice: Give graphic designers access to **The Team Dashboard** so they can easily see what they need to work on and **The Asset Organizer** for a place to store all their projects.



Content Marketing Writers

Use Case: Content Marketers need to manage their daily workloads, monitor project progress and potentially see how their blog posts are performing on social media, but they probably shouldn't be responding to incoming social media messages, etc.

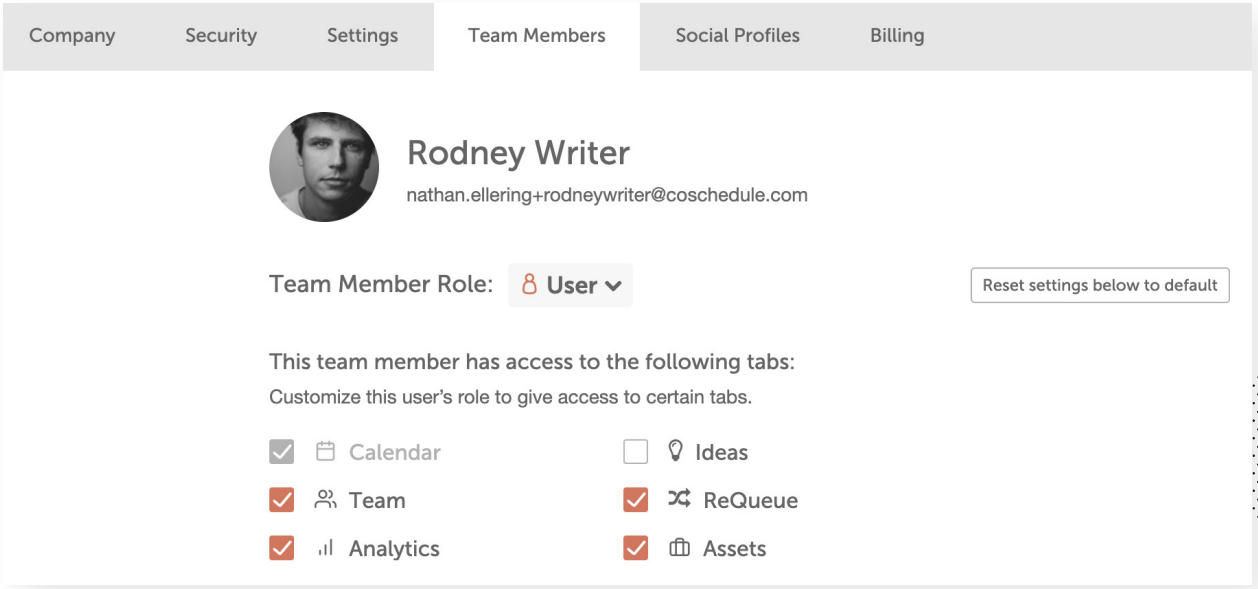
Best Practice: Give your Content Marketers access to the **Team Dashboard** so they can easily see what they need to work on; **Analytics** to see how their blogs are performing on social media; **The Ideas Board** to put content marketing and blog ideas in the backlog; and **The Asset Organizer** to pull graphics for their projects.



Social Media Coordinators

Use Case: When it comes to social media, it's important to restrict who has access to these features. You don't want someone to respond on behalf of your organization without proper permission. Some of your team is trained to respond using the brand voice and PR guidelines, and others are not.

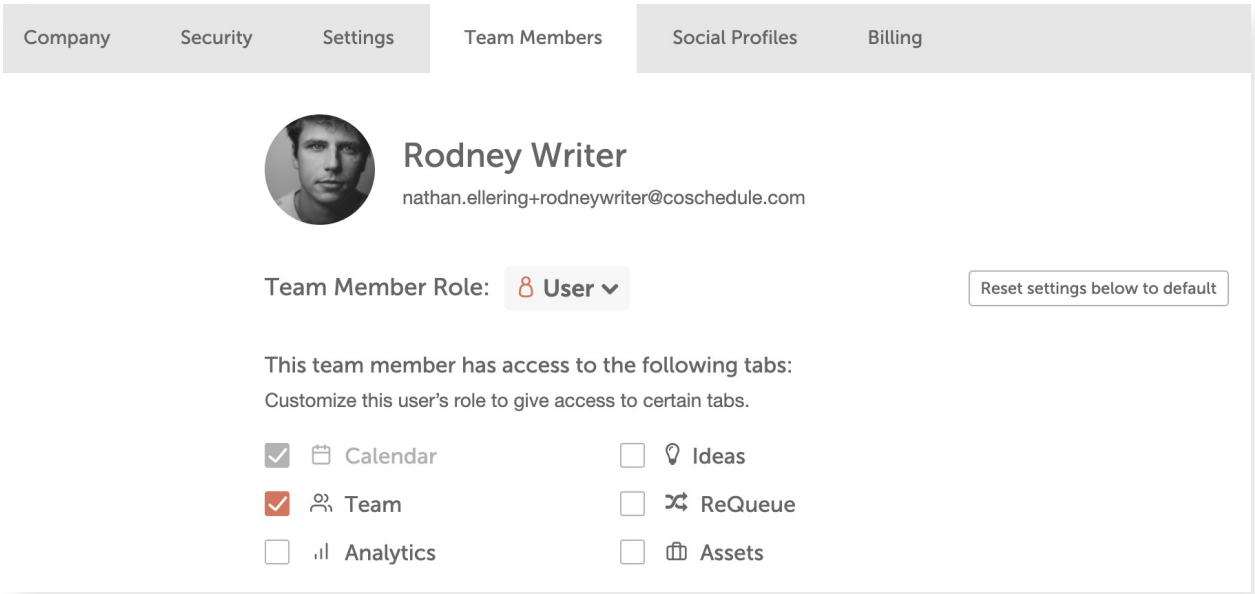
Best Practice: Social media is a powerful tool for marketing, but not everyone needs to access it. We recommend giving Social Media Coordinators access to **The Asset Organizer** so they can easily find documents; **The Team Dashboard** to Plan their daily work, and **ReQueue** to get better ROI on their social media efforts.



Copywriters

Use Case: Copywriters need to manage their daily workloads and quickly see what tasks they need to accomplish.

Best Practice: Give your Copywriters access to the **Team Dashboard** so they can easily see what they need to work on.



Analysts

Use Case: Marketing Analysts need to manage their daily workloads and quickly see what tasks they need to accomplish and need to see data in CoSchedule to pull reports when necessary.

Best Practice: Give your Analysts access to **The Team Dashboard** so they can easily see what they need to work on, as well as **Analytics.**

