

Admin Panel Guide

We'll show you how easy it is to get set up

It's time to personalise your network and invite your colleagues to access this powerful platform (online by browser or by mobile app for iOS or Android).

We've designed this admin panel guide so you can have everyone using the app in no time.

Let's get started!



Inviting colleagues

Follow the instructions below to send an invitation to everyone in your organisation. Please note your invitations will go out immediately.

From the top navigation pane go to Colleagues > Manage Colleagues. Then upload your employee data to invite colleagues to the LifeWorks perks platform:

- 1 Add employee data to the add_users_template.csv file that can be downloaded from the Admin Panel.
- 2 Select 'Add users', then follow the on-screen instructions.



To invite employees to the platform, you will need to upload their data. As a minimum, you will need employee IDs and work email addresses.

- Upload file: Drag and drop a file into the uploader, or select 'Upload File' to browse your computer for the appropriate file.
- Format file: Use the drop-down options above each column that match the appropriate headers to the data within the file. The 'remove headers' checkbox will prompt the uploader to ignore any column headers present on your file. Select 'Submit' upon completion.
- Preview: Preview the data to ensure the correct headers are above each column, then select 'Submit.'
- Upload summary: An Upload Summary will confirm the number of colleagues invited and highlight any errors.

Granting admin access

You can make other active colleagues Administrators by selecting their profiles from the Colleagues > View Colleagues page.

- Select 'Make Admin' from the 'Settings' drop-down
- An email notification will be sent alerting the user to the updated access level

Sending reminders

Next step: Stay on top of sign-ups. As an administrator, you can view who has signed up and who is active on the platform, and which colleagues are still pending.

- From the top navigation panel go to Colleagues > View Colleagues.
- Send a reminder invitation to pending colleagues by going to the 'Pending' tab and either selecting 'Remind All' to send a reminder invitation to all pending, or by searching for a specific colleague and selecting 'Remind' beside their line entry.

Removing Colleagues

Now that you have a better understanding of the invitation process, it's time to look at the ways you can remove people (leavers) using the Admin Panel. Remove a leaver in one of two ways:

- 1 The Archive option allows you to deactivate a user. This individual will be immediately logged out and no longer have the option to log in to your organisation's network.
 - To archive an employee, go to Colleagues > View Colleagues from the top navigation pane.
 - Search and select the colleague you wish to archive.
 - Select 'Archive' from the 'Settings' drop-down in the top right corner of the participant's profile.

You can also reactivate a user from the 'Archived' tab under 'Manage Colleagues'. This could be helpful for colleagues returning to your organisation after a leave or sabbatical. Find the profile in the Archived list and choose the 'Reactivate'.

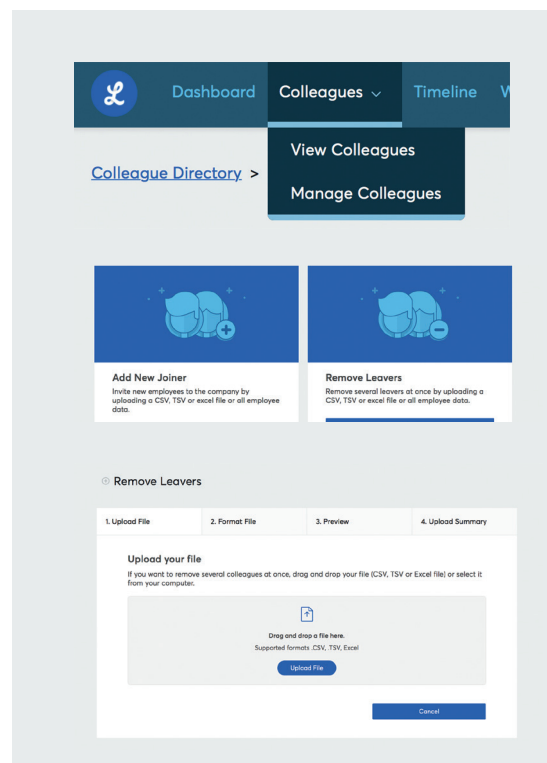
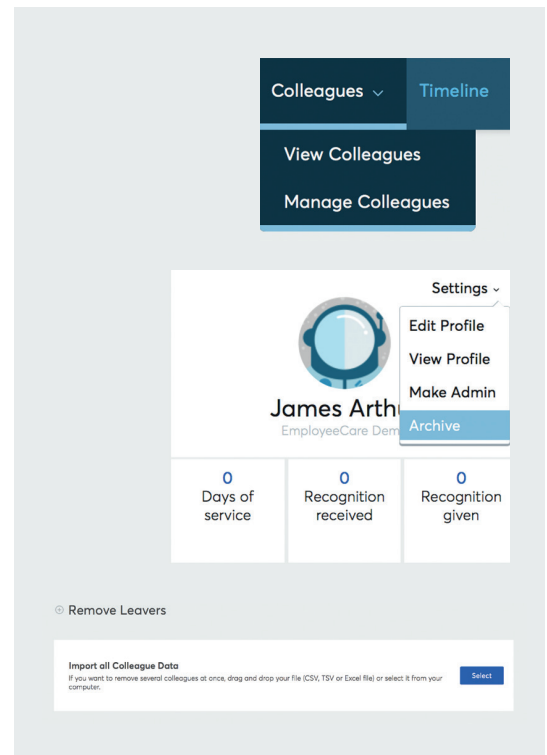


We recommend you move leavers to an Archived state for at least 180 days after they have left your organisation, enabling them to retrieve any earned cashback credited to their wallet through the use of Perks. Archived users can submit a technical support ticket at help.lifeworks.com to retrieve any pending cashback. However, when you delete a leaver, that data is removed automatically, and our Support Team will be unable to award pending cashback.

- 2 The 'Remove Leavers' option allows you to remove multiple colleagues via .csv, .tsv, or Excel file. Access this function from the top navigation pane: Colleagues > Manage Colleagues.
 - Select 'Remove Leavers', then follow the on-screen instructions.
 - Upload file: Drag and drop a file into the uploader, or select 'Upload File' to browse your computer for the appropriate file.
 - Format file: Use the drop-down options above each column that match the appropriate headers to the data within the file. The 'remove headers' checkbox will prompt the uploader to ignore any column headers present on your file. Select 'Submit' upon completion.
 - Preview: Preview the data to ensure the correct headers are above each column and then select 'Submit.'



Unlike the New Joiners file, the Leavers file only needs one piece of user data and this depends on how the colleagues were invited to the network – by unique ID or email.



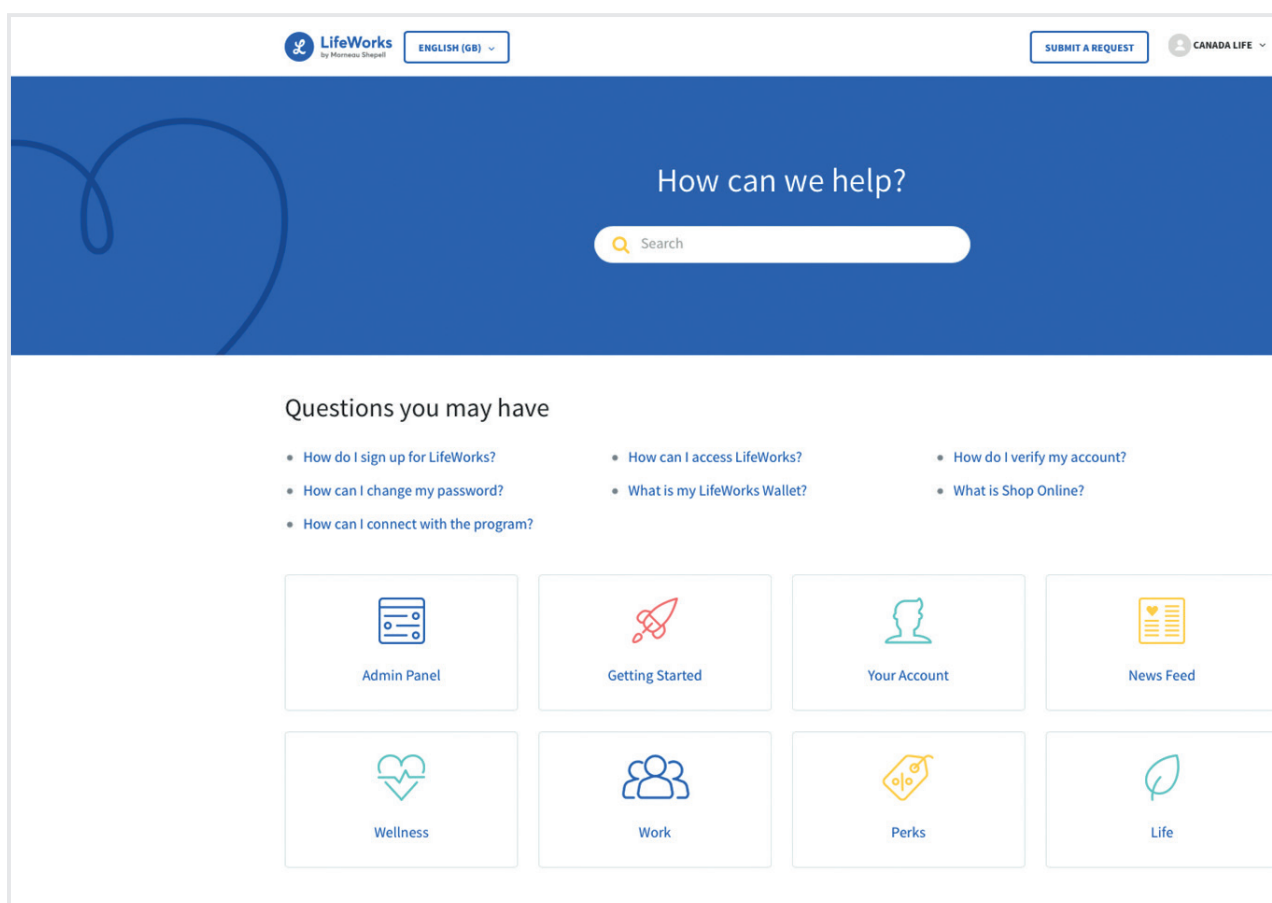
Sounds pretty simple, right?

You and your colleagues are ready to start enjoying all that Canada Life has to offer!



Be sure to review the LifeWorks Help Centre to find answers to common questions.

Navigate to the Help Centre on the Web app from the drop-down in the top right corner, and from the “More” button in the mobile app.



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