

Maintaining Contacts

Adding, Removing, Updating and Allocating User Roles

Maintaining Contacts

A school site's Account Administrator is the Client Portal user responsible for maintaining the contacts related to the site within the Client Portal.

Invite Users to a Business Account

SPECIAL NOTE: For schools with multiple campuses, please DO NOT invite the same user to multiple business accounts in the Client Portal. Instead, contact QIS BGA who will arrange access for all relevant people to all relevant accounts.

1. From the Client Portal Home Page, click an account name and select *Account Details*.



2. From the Contacts tab, select *Create Contact*.

BGA	Home Published Rounds	Contacts	Past Events	Past Requests	Panels	School					Little School +	-
	Create Contact	Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer			
	Active	Julie Jones	54565	julie@test.com	General User	Revoke			Yes	I		
	Active	Mr Andrew Smith	565656	andrew@test.com	Account Administrator			Yes		1		
	Active	Sam Smith	65465	sam@test.com	Basic User	Revoke				1		

3. Invite a user by completing the contact's details and choose their user access as Account Administrator, General User (was Standard User) or Basic User and select *Save*.

There can be multiple Account Administrators, General Users and Basic Users.

Create Contact		
First Name *		
		0/200
LastName *		
		0/200
Email		0/200
		0.200
2 Send Invitation		
An invitation to connect this contact to the organisation will be sent to the above email address.		
Select and function community		
Account Administrator - Access to all records to be tricipate in tasks across the entire Account, with additional permissions to manage account information and user access & roles.		
General User - Access to all records, able to participate in tasks across the entire Account		
Basic User - Limited access to an Account of be assigned to and participate in specific teams and tasks within the Account		
	Cancel	Save

4. An invitation will be sent to the contact allowing access to the Business Account.

Dear Sam,
This email address has been provided as you've been identified as a Standard User for the organisations potential grant
Please log in to Enquire to create your account. <u>Login or Sign Up</u>
A Tactiv Innovation

Allocating a Basic User to a Grant Record

A Basic User can access individual grants to which they have been allocated and online grant application forms i.e. Master Plan grant applications and External Infrastructure Subsidy Scheme applications.

An Account Administrator or a General User can allocate a Basic User to an individual grant. The Basic User must first be provided access to the Business Account as per the previous instructions.

To allocate a Basic User to an individual grant:

- 1. Navigate to the relevant grant under *My Projects*.
- 2. Click the pencil icon to edit user access.

Heme Published Rounds		Little School 🐱
	Home	
Upcoming Activities	Name Opens Closes	
	Master Pan Greet - March 2025 Round Sr/17/2025 10 09 AM	Apply View Details
My Projects		Féter
PJ-0000893 Little School - APP2025 (CGP 2	225) Open Mr Andrew Smith Lader, on	✓ • 1

3. In the pop-up screen, check the tick-box against the appropriate user and press *Save*. **NB** hovering over the grid icon next to a user's name will provide information about their system access. A Basic User does not have a grid icon next to their name.

Upcoming Activities	Kane	Opens	Closes	
My Projects PJ 0000993 D def Jones	Mater Par Gart - Mach 2028 Road		Sr112025 1029 M	Auty Mes.Details

4. The Basic User, indicated in pink, will now have access to the grant record and any associated workflows.

Upcoming Activities	Name	Opens	Closes	
	Master Plan Grant - March 2025 Round		5/11/2025 10:39 AM	Apply <u>View Details</u>
My Projects				Filter
PJ-0000893 Little School - APP2025 (CGP	2025)	Open	Mr Andrew Smith Julie Jo an Smith	/ × 1

5. Access can be removed at any time by clicking the pencil icon and un-selecting the Basic User.

Update Contact Details

1. Select the morevert (three dots) associated with the relevant user.

BGA	Home Publish	ad Rounds								Litt
	A TON				Little	School		12		
	Detail	s Contacts	Past Events	Past Requests	Panels		ALL NOTERS			1119-24
	Create Contact									
	Create Contact Status	Name	Primary Phone	Primary Email	Account Access	Invite Status	Pealtion	Key Contact	Accountable Officer	
	Create Contact Status Active	Name Julie Jones	Primary Phone 54505	Primary Email	Account Access General User	Invite Status Revoke	Pealton	Key Contact	Accountable Officer Yes	
	Create Contact Status Activo Activo	Name Julie Jones Mr Andrew Smith	Primary Phone 54505 205036	Primary Email julie@sest.com andrew@test.com	Account Access General User Account Administrator	Invite Status Revoke	Position	Key Contact Ves	Accountable Officer Yes	

2. Choose *View* and access the menu, allowing details to be edited, and then *Save* the required changes.

BGA		Ho	ne Publishe	d Rounds										Little School 🛛
	A.							er er	ttle School					
			Details		Contacts	Past Events	Past Requests	Panels						
		Cre	ate Contact											
		Sta	tus	Ne	me	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer		
			lative	يال	lie Jones	54565	julie@test.com	General User	Revoke			Yes	1	
			lotive	М	Andrew Smith	565656	andrew@test.com	Account Administ	rator		Yes		View	
			lotive	Sa	m Smith	65465	eam@test.com	Basic User	Revoke				Make Key Contact	
													Maxe assic user	
													Make Account Administrator	

Remove Access

1. To remove a user from the Business Account, find the relevant user and select *Revoke*. The user will no longer be able to access the Business Account. They will not receive a notification.

BGA	Ī	Home Published Round	5									Little School 👻
						Little	School		12			
		Details	Contacts	Past Events	Past Requests	Panels						
		Create Contact										
		Status	Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer		
		Active	Julie Jones	54505	julie@test.com	General User	Revoke	>		Yes	1	
		Activo	Mr Andrew Smith	565656	andrew@test.com	Account Administrator			Yes		1	
		Active	Sam Smith	65465	sam@test.com	Basic User	Revoke				1	

Managing Roles

An active user can be allocated to be a Key Contact or an Accountable Officer.

Key Contact

Receives ALL notifications sent by QIS BGA advising of a task to be completed via the Client Portal. There can be only **one** key contact per organisation.

Accountable Officer

Holds overall accountability for the school's participation with QIS BGA as an agent of the Approved Authority. This can be applied to multiple users.

1. Find the user being assigned a specific role and select the morevert (three dots).

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				1	Little	School		1/1			
	Details	Contacts	Past Events	Past Requests	Panels						
			-								
	Create Contact	Nama	Primary Phone	Primary Email	Account Access	Invite Status	Prolition	Kay Contact	Accesstable Officer		
	Active	Julie Jones	54505	julie@test.com	General User	Revoke		,	Yes	1	
	Active	Mr Andrew Smith	303030	andrew@test.com	Account Administrator			Yes		:	
	Active	Sam Smith	65465	sem@test.com	Basic User	Reader					

2. Access the menu that will allow *Make Key Contact* or *Make Accountable Officer*. The relevant user will not receive a notification but the changes will be immediate.

BGA		Home	Published Round										Little School 🛛 🕈
	P.						enu	e School					
			Detailo	Contacts	Past Events	Past Requests	Panels						
		Create	Contact										
		Status		Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer		
		Activ	•	Julie Jones	54565	julie@test.com	General User	Revoke			Yes	1	
		Activ	•	Mr Andrew Smith	565656	andrew@test.com	Account Administrator			Yes		View	
		Aotin	•	Sam Smith	65465	sam@test.com	Basic User	Revoke				Make Key Contact	
												Make Basic User	
												Make Account Administrator	