The Commonwealth of Kentucky

Release 4

Business Connect

BusinessConnect.ky.gov

Quick Reference Guide

User Roles

This Quick Reference Guide is designed to help the Business Partners to understand the different user roles and permissions in Business Connect.

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User Roles

User Roles Overview

Business Partner organization profiles are managed through different levels of access: Contacts and Profile Administrators. A Business Partner Contact may have the contact access level or the profile administrator access level.

Admin

- The first person to apply for an organization in Business Connect
- The highest level of permissions within the organization being able to see all chapters, contacts, and opportunities associated with their organization
- The primary point of contact for the organization during the onboarding application
- The ability to add other users to their organizations as either admins or contacts
- The ability to create new chapters, add new contacts and admins, add new chapters
- Create registrations for all opportunities associated with their organization
- Mark attendance for opportunities

Contact

- Contacts are associated with chapters and will only be able to see the chapter in which they belong in the system
- There can be multiple admins and contacts for an organization
- The ability to edit their own contact profile (except email and chapter), create/cancel opportunities and time slots for their chapter, create/cancel individual registrations to opportunity timeslots for their chapter, and perform verification of opportunity attendance for their chapter's opportunities
- The contact can only view their own chapter and opportunities within the system

The "Admin" role has access to the following functionality:

1 **See all chapters, contacts, and opportunities**

2 **Create new chapters, onboard additional Profile Administrators and Contacts.**

3 **Keep track of attendance and enroll citizens in opportunities**

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The following chart outlines the different access levels for each Business Partner role:

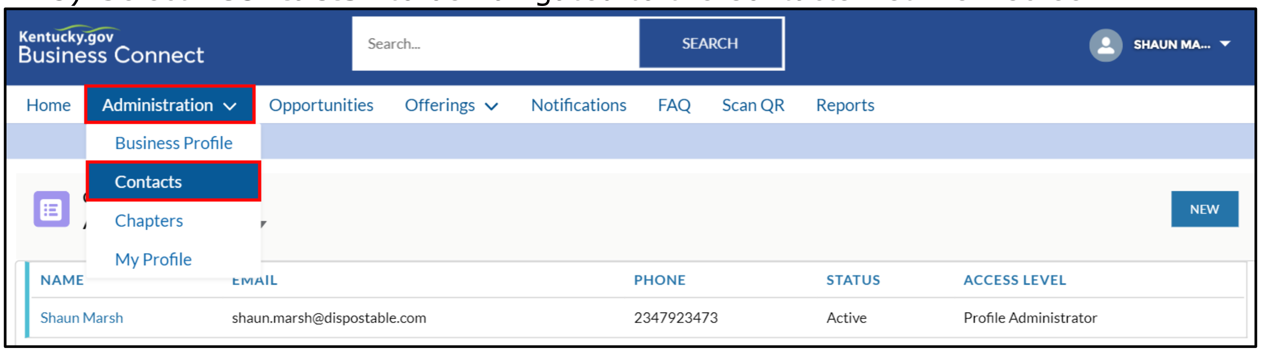
Functionality:	Admin:	Contact:
Create/Cancel opportunities for the chapter	√	√
Create/Cancel individual registrations to opportunity timeslots for the chapter	√	√
Perform verification of individual participation in opportunities for the chapter	√	√
Edit their own profile	√	√
Upload documents for their organization	√	√
Create offerings for their organization	√	√
View all chapters, contacts, and opportunities associated with an organization	√	
Create/Cancel opportunities and individual opportunity registrations for all chapters within the organization	√	
Perform verification of individual participation for opportunities for all chapters within the organization	√	
Add new chapters, onboard new admins and contacts	√	
Request to be a Training Provider (ETPL) if they are an existing CE or SNAP 50/50 provider	√	

Viewing a Contact

An existing contact can view other contacts; on board, other users from their organization as well as deactivate other users in *Business Connect*.

The following steps are used to view a contact:

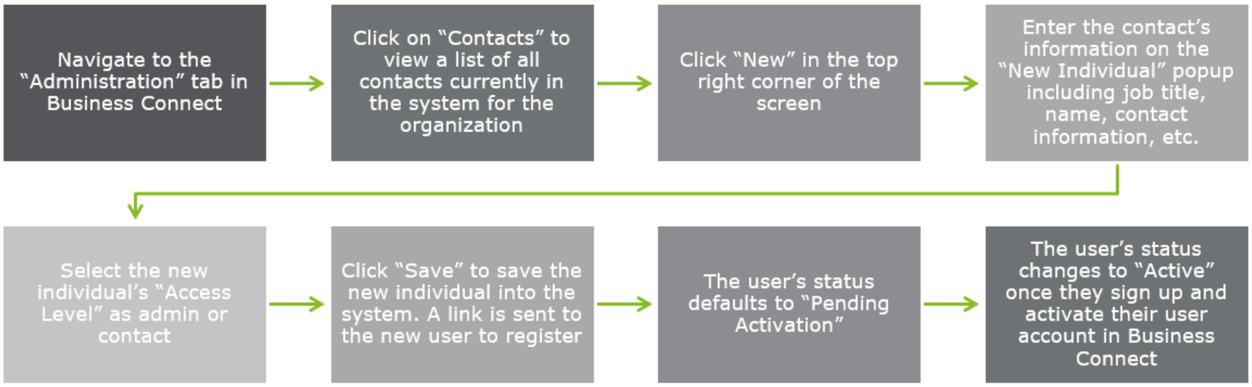
1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Contacts"** to be navigated to the *Contacts List View* screen



4) Select the specific **contact** to view the details of that contact

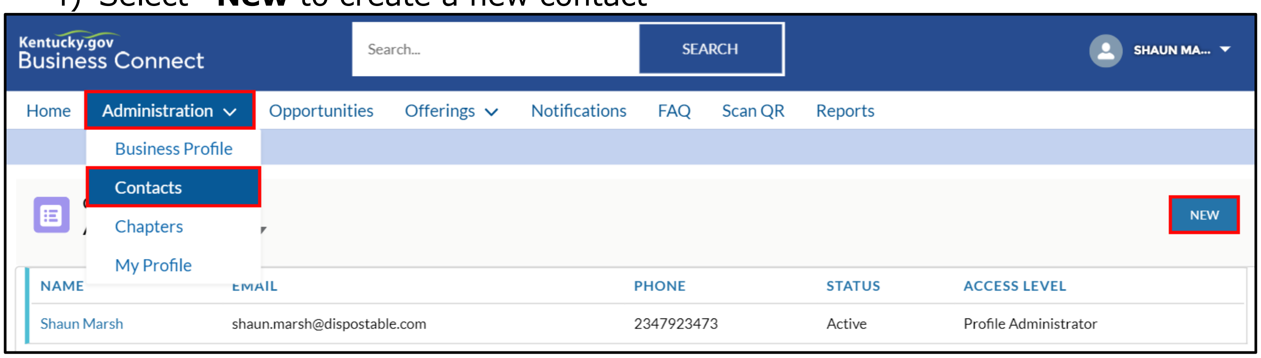
Onboarding a Contact

The *New Onboarding Contact* screen is displayed when the User clicks **"New"** on the *Contact View* page. The *Contact List View* screen allows the user to view the existing contacts as well as create new ones.



The following steps would help the User onboard a contact:

1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Contacts"** to be navigated to the *Contacts List View* screen
4) Select **"New** to create a new contact



4) Enter the following details about the new contact:
    - Job Title
    - First Name
    - Last Name
    - Email
    - Phone
    - **Access Level – This field determines if the new user has "Admin" or "Contact" level access**
    - Chapter
    - Language Preference
    - Notifications Preference

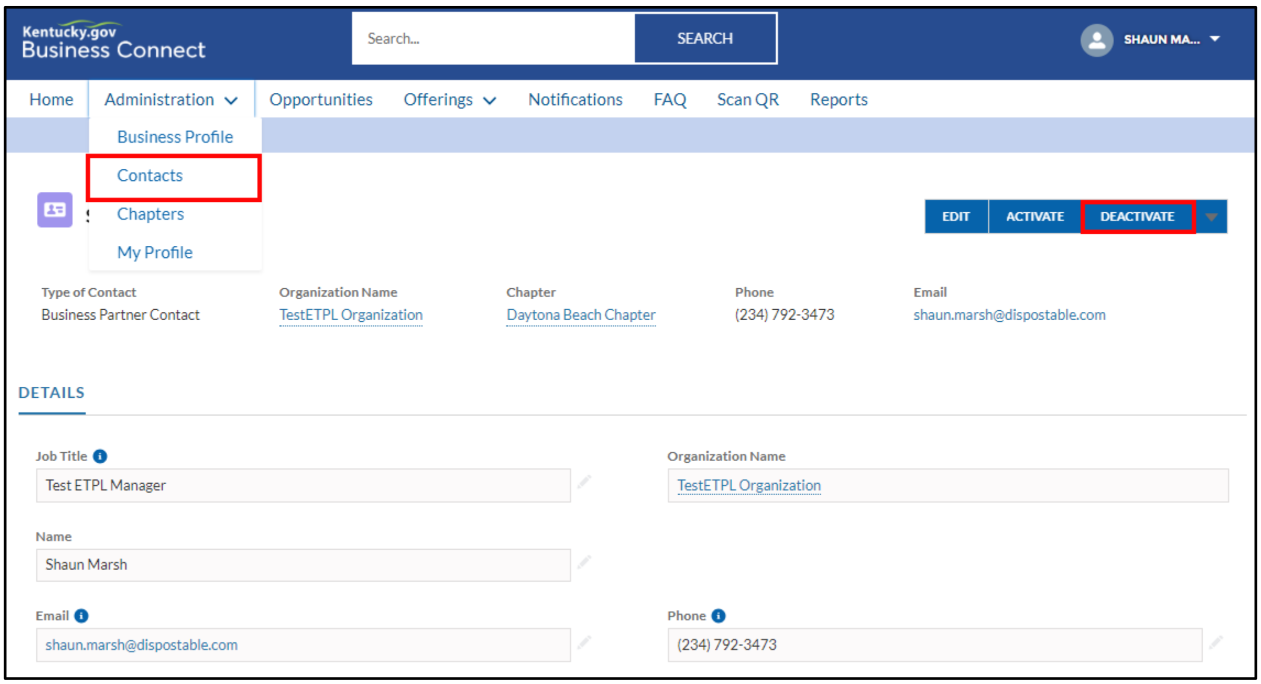
5) Select **"Save"** to create a *New Contact Record*
    - The *New Contact Record* is created with *Pending Activation* status and will become active after they sign up and create an account

Deactivation of a Contact

The *Deactivation of a Contact* screen is displayed when the User selects **"DEACTIVATE"** on the *Contact View* page.

To deactivate a Users profile, use the steps below:

1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Contacts"** to be navigated to the *Contacts List View* screen
4) Select **"Deactivate"**



5) Select the reason for *Deactivation* from *Deactivation Reason* drop-down
6) Select **"Save"** after selecting the appropriate deactivation reason from the drop-down
7) A confirmation pop-up screen will appear marking successful deactivation of the Users account

In addition to deactivating contacts, users can also edit, activate, and resend registration link following the steps above.

Edit:
A contact may edit their own information by clicking "Edit" on their individual profile

Activate:
If a user is inactive, the admin may click "Activate" on the user details screen. This will trigger an activation link to be sent to the user.

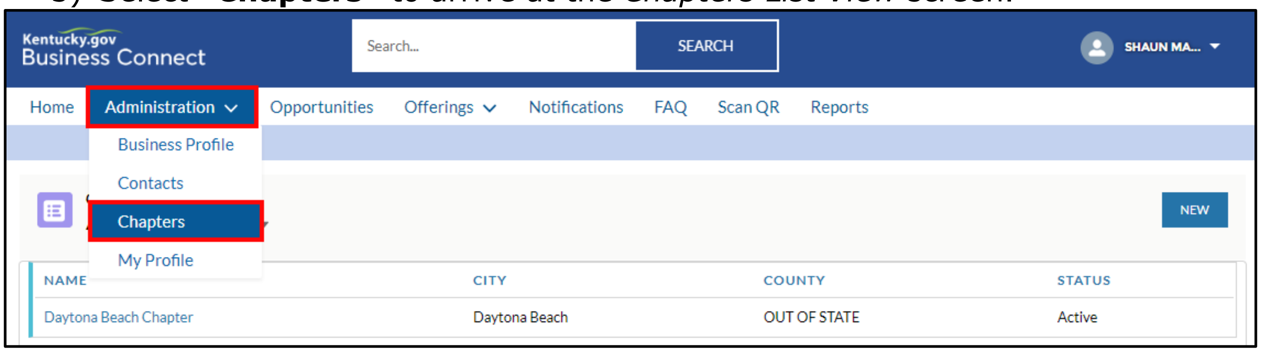
Deactivate:
If a user is active and should be inactive, the admin may click "Deactivate" on the user details screen and provide a reason for deactivation. Their profile is then read only.

Resend Registration Link:
If the status of the user remains "Pending Activation" the admin may click "Resend Registration Link" to send the link again.

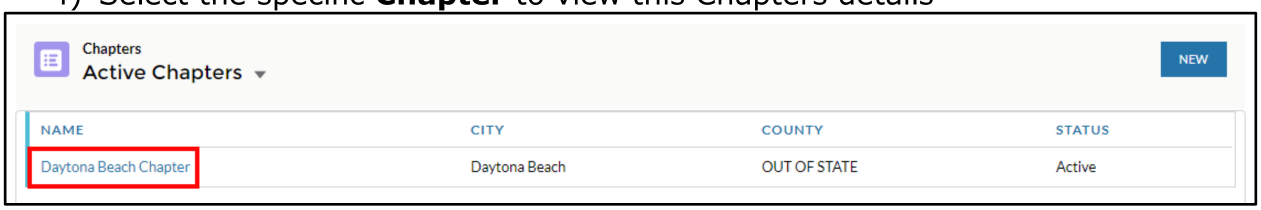
Viewing the Chapters

The *Viewing the Chapters* creen allows Business Partners to see a *List of the Chapters* related to the Business Profile. Only the Profile Administrator will have access to view all the Chapters related to the Business Profile.

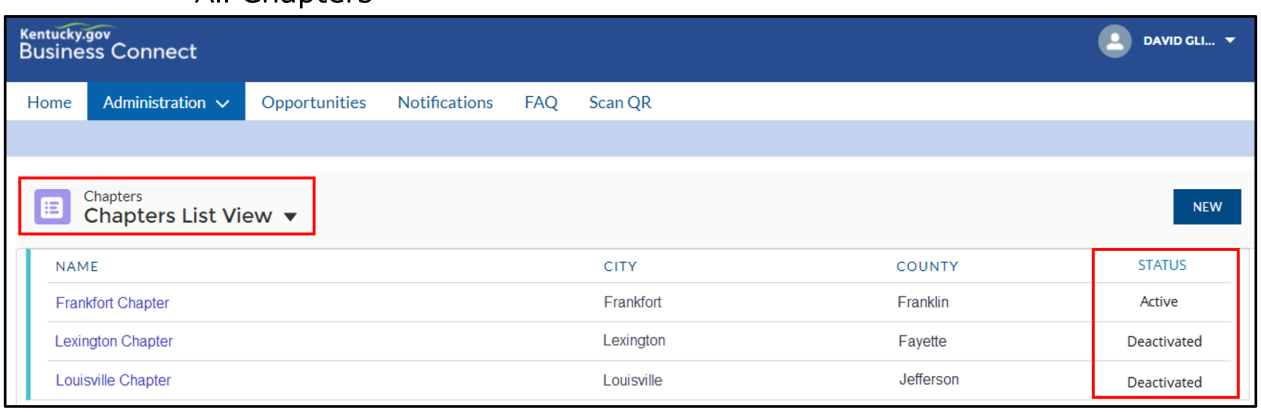
1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Chapters"** to arrive at the *Chapters List View* screen.



4) Select the specific **Chapter** to view this Chapters details



5) The following list views will be available on the screen:
   - Active Chapters (default)
   - Deactivated Chapters
   - All Chapters

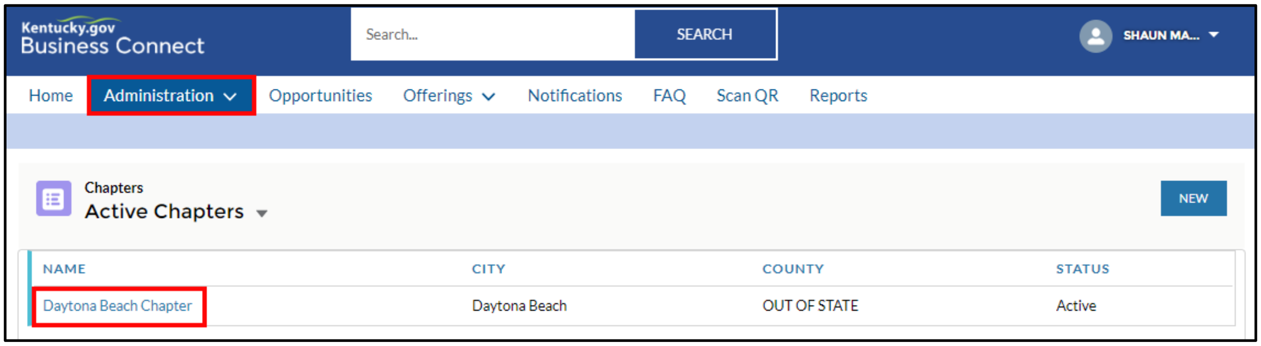


Editing the Chapters

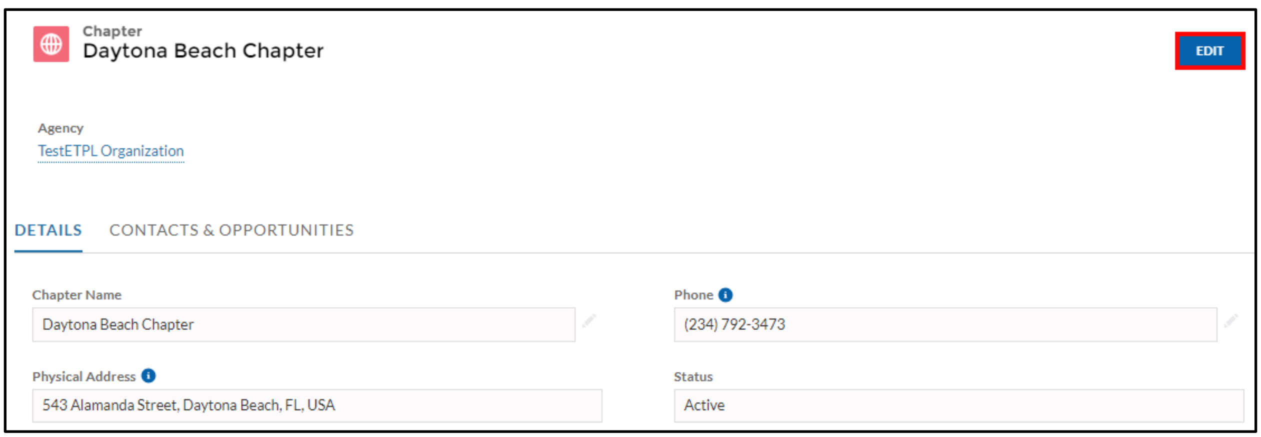
The *Chapter Summary* screen allows Business Partners to view and edit a Chapter. This page is available when a Business Partner clicks on a **Chapter Name** on *Chapter List View*.

Use the steps below to edit a Chapter:

1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Chapters"** to arrive at the *Chapters List View* screen.
4) Select the specific **Chapter** to view details and have capability to edit this Chapter



5) Select **"Edit"** located in the top right corner of the specific *Chapter's detail* screen

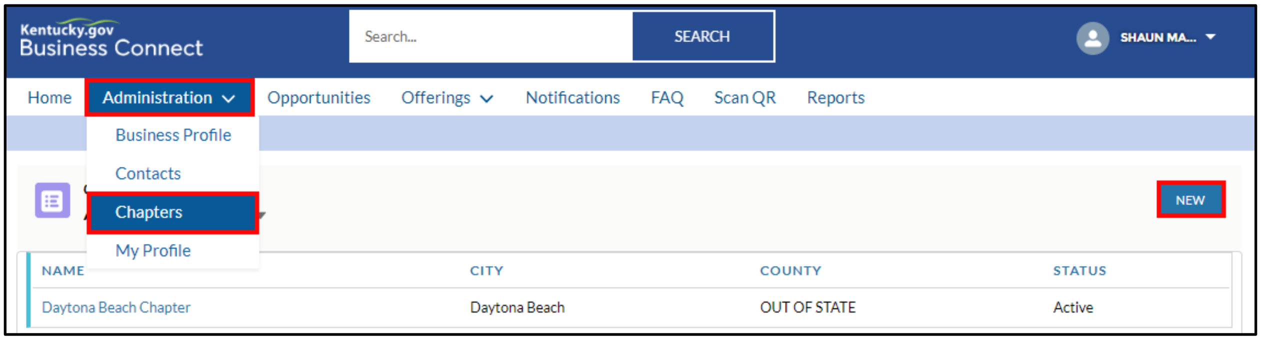


6) Update any details in the specific *Chapter details* screen
7) Select **"Save"**

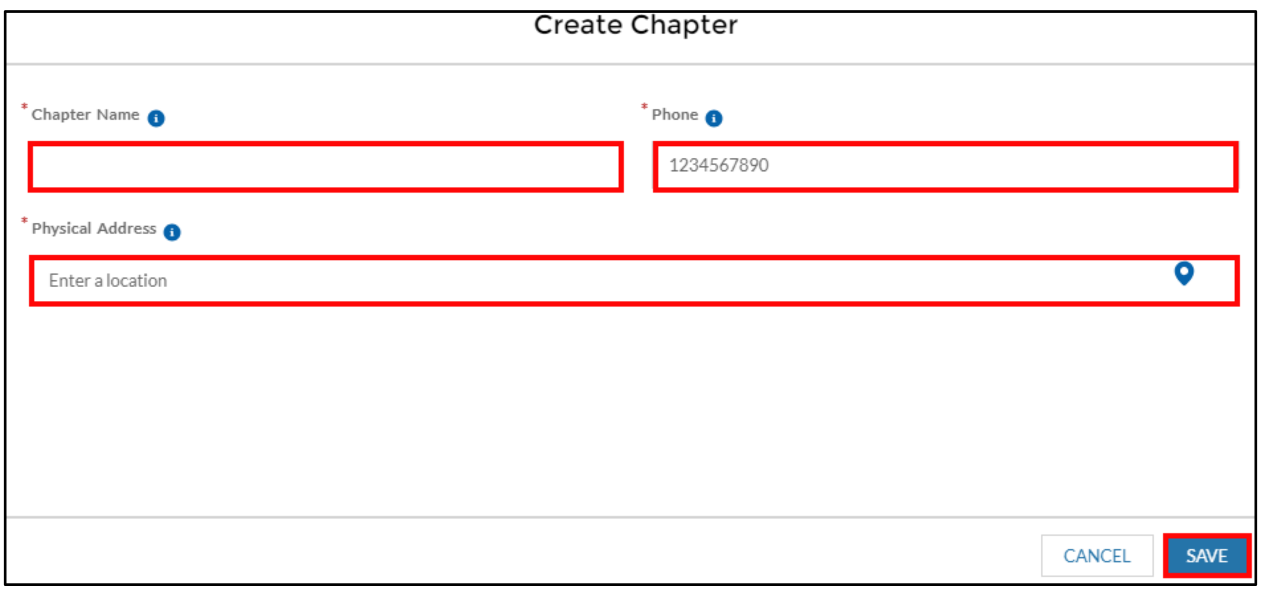
Creating the Chapters

This page allows Business Partners to create a new Chapter.
Use the steps below to *Create a New Chapter*:

1) Navigate to the Business Connect login page and select **"Login"**
2) Select **"Administration"** from the Business Connect *Home Dashboard*
3) Select **"Chapters"** to arrive at the *Chapters List View* screen.
4) Select **"New"** on the *Chapter Summary* screen



5) On this screen, the details below will be required:
   - Chapter Name
   - Phone
   - Business Address
6) Select **"Save"**



Apply to be a Training Provider

Organizations that are already in the system as CE or SNAP providers may request to be a training provider (ETPL) by clicking on the **"Apply to be a Training Provider"** button on the home screen. After going through the application process and answering the additional questions required to be a training provider, the application will go to the leads queue to be approved by the State. After approved by the State, the organization will become a combination provider (SNAP and CE plus Training Provider ETPL).

In order to apply to be a training provider, a current CE or SNAP organization admin must do the following:

1) Navigate to the Business Connect login page and select **"Login"**
2) Navigate to the Home screen, also known as the dashboard
3) Select "Apply to be a training provider"

4) Fill out all additional questions required to be a training provider
5) Submit the request for approval
6) The system validates the entered data against the checklist and the state **rejects/approves** the application