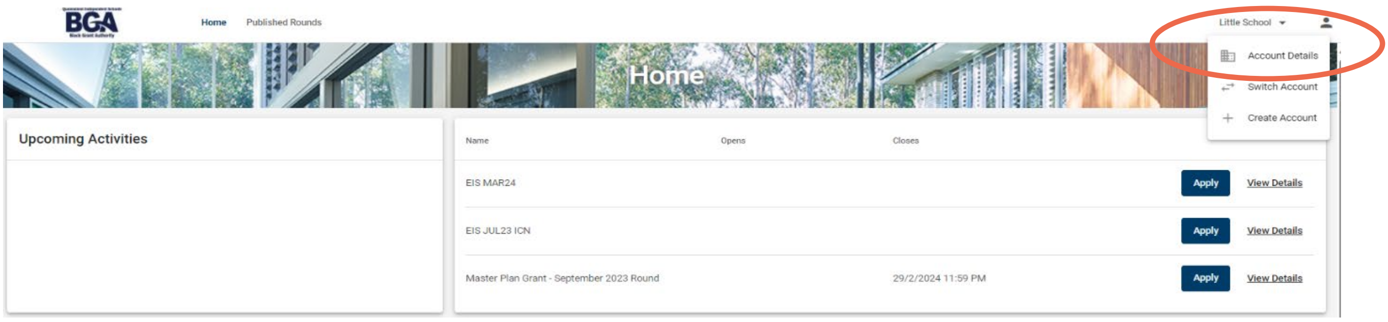
Maintaining Contacts

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

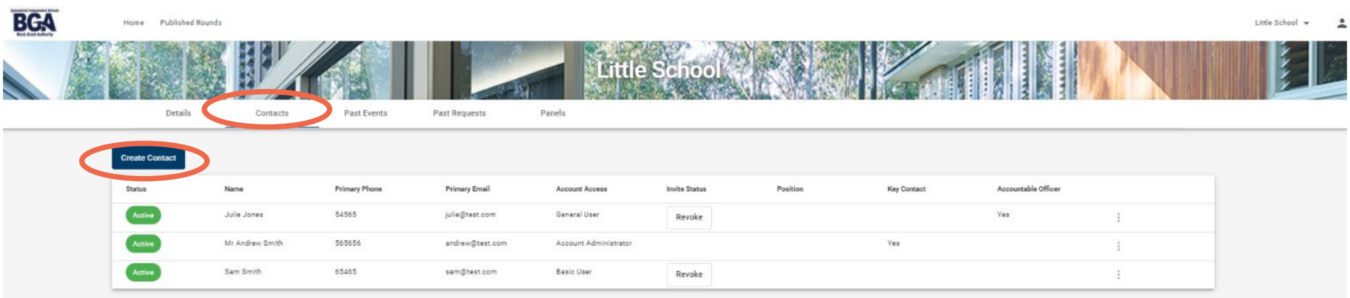
Invite Users to a Business Account

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*.



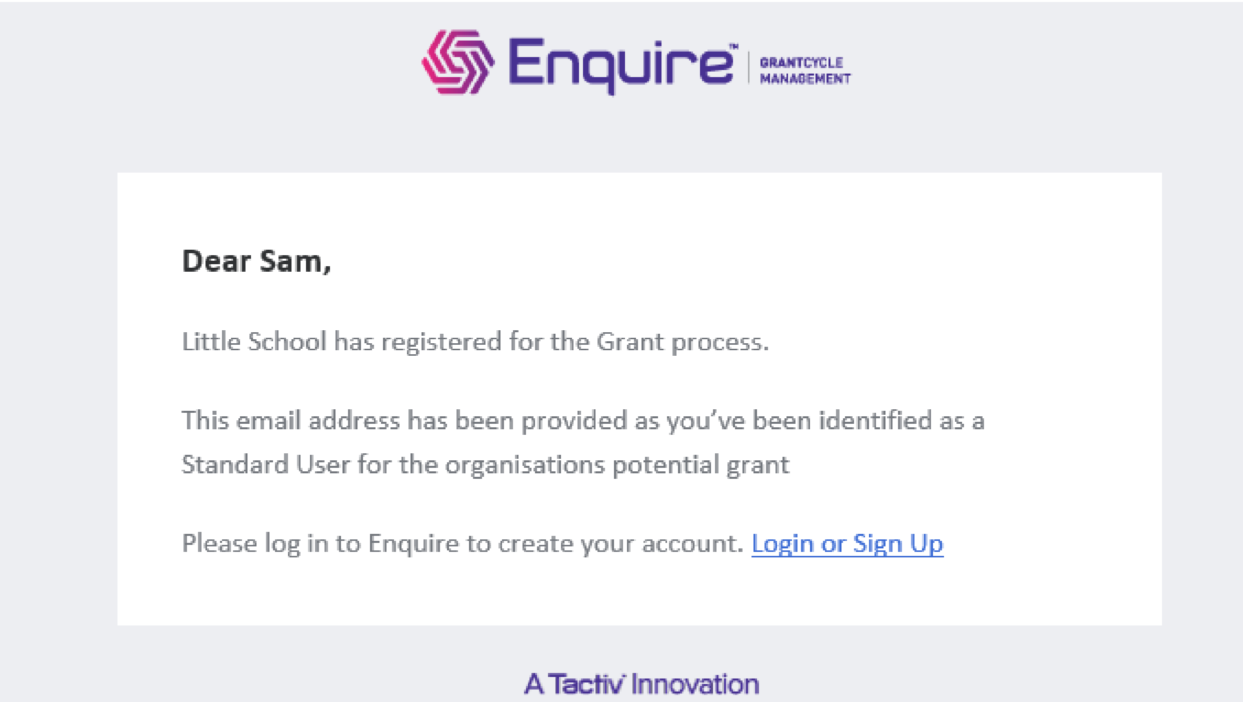
2. From the Contacts tab, select *Create Contact*.



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.

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



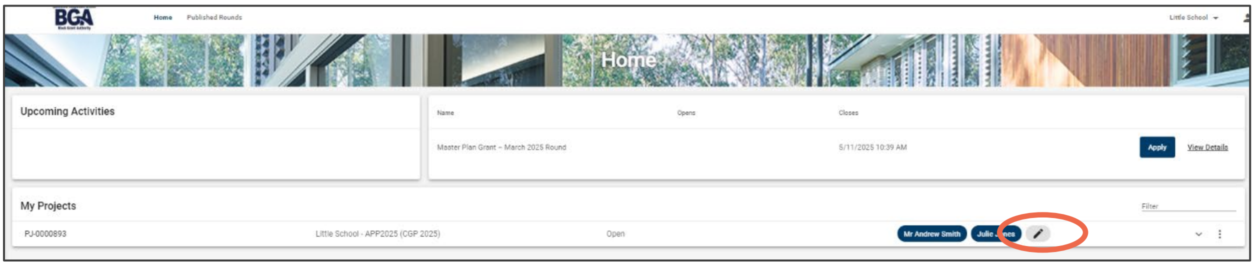
Allocating a Basic User to a Grant Record

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.

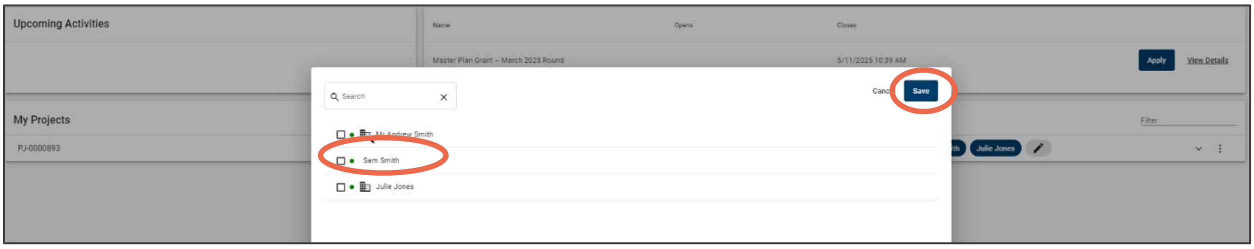
An Account Administrator or a General User can allocate a Basic User to an individual grant. The Basic User must first be provided access to the Business Account as per the previous instructions.

To allocate a Basic User to an individual grant:

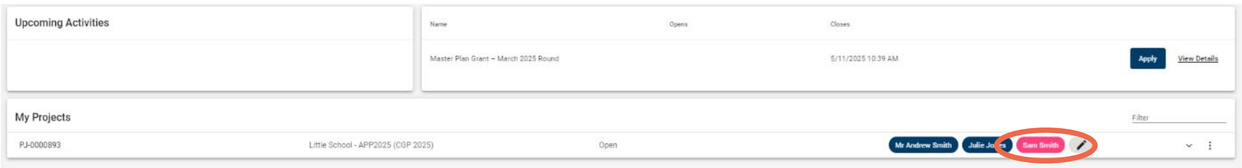
1. Navigate to the relevant grant under *My Projects*.
2. Click the pencil icon to edit user access.



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.



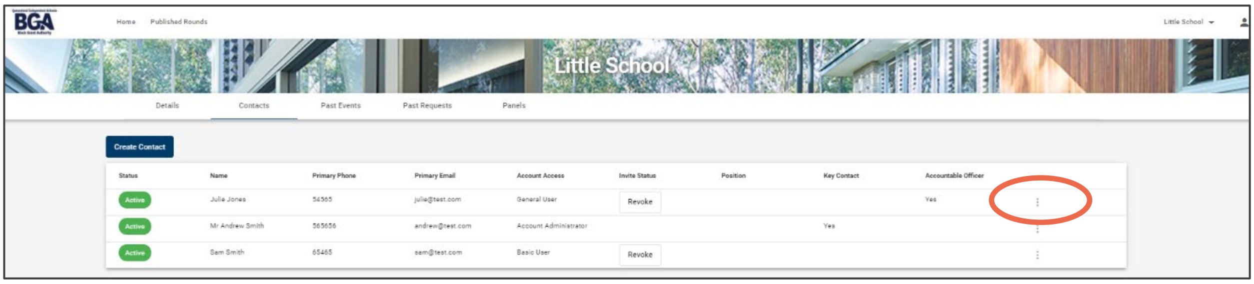
4. The Basic User, indicated in pink, will now have access to the grant record and any associated workflows.



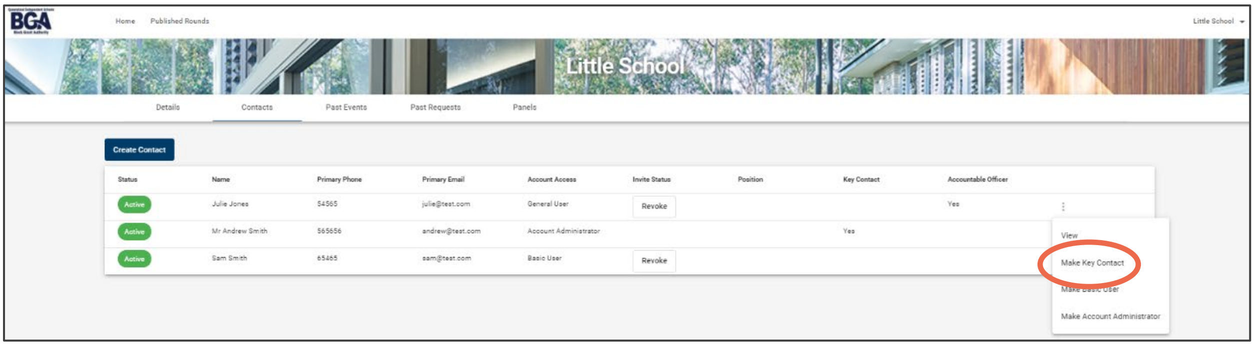
5. Access can be removed at any time by clicking the pencil icon and un-selecting the Basic User.

Update Contact Details

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

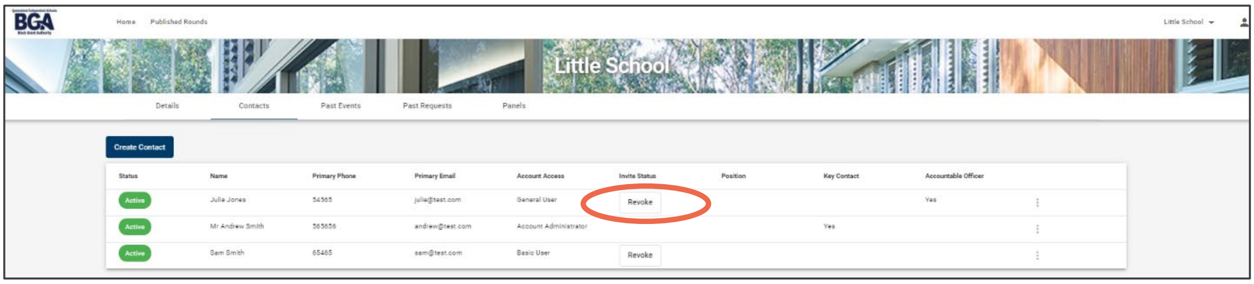


2. Choose *View* and access the menu, allowing details to be edited, and then *Save* the required changes.



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.



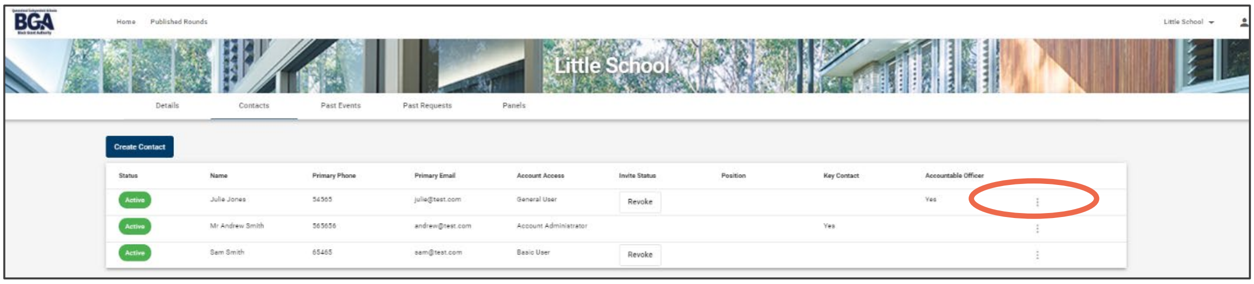
Managing Roles

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).



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.