Contact Manager Guidance

Overview

Contact Manager provides Centre Administrators with the following capabilities:

1. View all of their contacts, their roles, sites and expiry dates
2. Expire or Close an existing contact - i.e. bring their role to an end (as of 'today')
3. To make modifications to existing contacts
    a. Make changes to forename, surname, telephone
    b. Change the site at which the contact holds their role
    c. To change the contact's email address (for a particular role) - subject to the revised email either being new, or already being assigned uniquely to the contact.
4. Add new contacts
5. Add new roles to existing contacts

Contact Manager's Contacts List

- Each contact is displayed with their email, telephone number, site and role.
- Only valid contacts are displayed. If a contact's 'Valid To' (held-up-to/expiry) date has been filled in prospectively, this will be displayed in the last column.
- All columns are sortable.
- Where a contact's role gives them access to the Open Awards Portal, this is indicated by a 'globe' icon next to the role.
- Against each contact is an 'Actions' menu: this provides access to options to close the contact (and re-open if used in error), modify the contact, and add another role to a contact.

Who Can Change or Add What?

In order to protect the quality of the data held about contacts, only the Centre Administrator will have privileges to change contact details.

1. Your centre's contacts are displayed and/or can be modified or added.
2. Open Awards defines which roles you may add and/or expire for each Portal role. If you find there are any roles missing which you will need to add, please contact Open Awards via customerservice@openawards.org.uk

Expire (or Close) an Existing Contact

1. Press the arrow on the drop-down actions menu left of the contact's details
2. Click on the 'Close' link next to the contact (role/site) which is to be expired
3. Confirm

NB: The contact row will display in grey to indicate that this contact is expired as of today. A centre reviewing the list the following day will not see the expired contacts.

Modify Names, Email, Telephone, Job-Title or Site

1. Click on the 'Actions' menu against the corresponding contact, and select: 'Modify'.
2. Amend the names, email and/or select a different site. NB: Only slight changes are permitted to the names/email/telephone details of a contact
3. Click the 'Modify' button

A confirmation box will appear on screen (and will automatically be cleared after about 5 seconds).

Add a New Role to an Existing Contact

1. Click on 'Actions' menu next to the corresponding contact and select: 'Add New role'
2. Set the required new role, and the site at which the contact holds that role
3. Click the 'Add' button

A confirmation box will appear on screen, and will automatically be cleared after about 5 seconds.

Add a New Contact

1. Click the 'Add New Contact' button
2. Fill in the contact's name, site, telephone, role, and email
3. Click 'Add'

A confirmation box will appear on screen, and will automatically be cleared after about 5 seconds.

Can a Role be modified?

You cannot modify an existing contact's role (this is by design to help ensure data integrity). However, if a contact changes role, you should:

1. Add a new role (per above) to the contact
2. Close the existing role for the contact