

Changing/Assigning CONNEX™ Virginia User Roles

As a profile owner in **CONNEX™ Virginia**, you can invite other users to register an account and help manage your profile. You can extend this invitation to those inside and outside your organization. For a step-by-step tutorial on how to add a user, see the **CONNEX Virginia – How to Invite Users to Help Manage Your Profile** link to download within the **Supporting Documents and Tutorials** bottom section of this web page: <https://genedge.org/connex-virginia>

Users can have one or more roles within your organization which allow them to manage specific modules within the CONNEX Virginia platform. For a list of all possible user roles, please see the **User Roles Defined** link to download within the **Supporting Documents and Tutorials** bottom section of this web page: <https://genedge.org/connex-virginia>

It's important to note that you might want to grant multiple roles to some or all your invited users. This document contains some general thoughts on assigning roles, and examples of how multiple roles could be assigned.

Administrator: This access has all functionality of a profile owner. Careful consideration should be given to access rights. This user role is the only person, besides the profile owner, which can invite and revoke profile access. We recommend this role be used sparingly within your own organization.

Profile Editor: This role should be assigned to anyone that might help manage a user profile. Marketing and/or Sales may be an excellent example of an internal user that should be granted access to manage your data. This may also be a place where a potential supplier, subcontractor, or economic development partner might be invited to help you update and manage your company's capabilities.

Profile Viewer: This is the minimum access role that should be granted to all invited users. This will include your company profile as "My Organization" and allows the user to see your company profile in addition to conduct general searches on the CONNEX platform. Any employee within your organization should be able to see your profile. It will provide a comparison against other company profiles, help orient the user to all searchable capabilities, and allow users to search and find potential customers or suppliers for your business.

Exchange Center Viewer: This role allows users to view and search for relevant opportunities that might be a good fit for your organization to respond to. Someone within sales and or purchasing, might be a good candidate for this role.

Exchange Center Manager: This role allows users to view, search and Post and Respond to relevant listings. This access could be assigned to your sales and purchasing groups, company owner, supply chain manager, business development or other personnel as needed.

Supply Chain Viewer: This role allows users to view any customer and supplier data entered by the account owner, administrator, or supply chain manager. Users with this assigned role should be aware of the sensitive nature of this content. It may be better to reserve this for C-Suite staff, and staff specifically tasked with establishing and maintaining relationships with suppliers on behalf of the company.

Supply Chain Manager: This role allows users to create and view any customer and supplier data entered by the account owner, administrator, or supply chain manager. Users with this assigned role should be aware of the sensitive nature of this content. It may be better to reserve this for C-Suite staff, and staff specifically tasked with establishing and maintaining relationship with suppliers on behalf of the company.

Subscription Manager: This user role is specifically for upgrading and managing CONNEX Marketplace access on behalf of all assigned organizations. This user role is ideal for financial or accounting personnel. If this is the only role a user is assigned, they will not be able to view or access any other functions of the CONNEX Platform except for entering or deleting credit card information from the system.

As noted above, any invited user within your organization, should be assigned the **profile viewer** role. This allows them to become familiar with the platform and be able to use the search function to locate local sources for potential products and services. If you have successfully upgraded your profile to national access, either via a promotional code or paid subscription, users can also search for domestic suppliers across all 50 states.

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The **profile viewer** role can also be assigned to economic development partners, local chambers of commerce, your preferred MEP personnel, and even potential customers or suppliers that you want to be able to see your specific company data that might not have their own access to the CONNEX Platform.

Employees responsible for purchasing, buying, supply chain development, or new business development should be granted, at minimum **profile viewer** and **exchange center viewer** access roles. Anyone tasked with finding, establishing, and maintaining relationships with those suppliers should be granted **exchange center manager** and possibly **supply chain manager** roles as well.

Employees responsible for marketing, sales, public relations, and business development may also need **profile editor** access to be able to support and manage your own company profile. This role could also be assigned to a service provider, such as an outside marketing firm or website developer, who might be helping update your company website or public facing communications.

Who do I contact with any questions regarding CONNEX Virginia?

Connect with your **GENEDGE Regional Growth Manager** today to learn more about CONNEX Virginia at <https://genedge.org/connect-with-us> or email at connexva@genedge.org