

CONNEX TUTORIAL



Understanding Account User Roles & Permissions

Organization Level Roles:

These permissions apply to any account record, manufacturer, or researcher, registered as a platform user.

OWNER

This system-assigned role applies to the first CONNEX User to claim an organization's profile. This allows the user to control 100% of the organization's use of the CONNEX Platform. This user can extend invitations to others to help manage their account and use of the platform, including people inside and outside of their organization. Permissions include:

- Add/Invite users
- Conduct searches
- Create/View supply chain
- Manage paid subscriptions
- Post/Respond to exchange center
- Update the company profile

ADMINISTRATOR

This owner-assigned role includes all the above functionality of the owner.

PROFILE EDITOR

This owner-assigned role allows the user to:

- Conduct searches
- Update the company profile
- Profile Viewer – This owner assigned role allows the user to:
 - Conduct searches
 - See, but not edit, the company profile data including any hidden details.



Manufacturer Specific Roles:

These permissions apply to registered Manufacturing users that have been assigned this role by the account owner. Users will not be able to see or manage your profile unless you assign them one of the profile roles outlined in the organization level roles.

EXCHANGE CENTER MANAGER

- See exchange center postings
- Create exchange center postings
 - Needs
 - Surplus
 - Respond to exchange center postings
 - View your company responses

EXCHANGE CENTER VIEWER

- See exchange center postings
- View your company responses

SUBSCRIPTION MANAGER

- Only has access to “My Subscriptions”
- Can upgrade an organization or organizations for national access

Research Specific Roles:

These permissions apply to registered Research users that have been assigned this role by the account owner. Users will not be able to see or manager your profile unless you assign them one of the profile roles outlined in the organization level roles.

EXCHANGE CENTER MANAGER

- See exchange center postings
- Create exchange center postings
 - Funded Research
 - Grant Opportunities
 - Request for R&D
 - Technology Transfer

(Exchange Center Manager cont.)

- Respond to exchange center postings
- View your company responses

EXCHANGE CENTER VIEWER

- See exchange center postings
- View your company responses

SUBSCRIPTION MANAGER

- Only has access to “My Subscriptions”
- Can upgrade an organization or organizations for national access
- Can manage payment information