



## Compassion Connect Procedure Manual: GlobalAccess Administrator

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## Introduction

Non-Compassion staff, such as contractors, volunteers, or Implementing Church Partner (ICP) staff, need to access Compassion Connect (Salesforce) and the Translator Portal through an external site. This external site is called GlobalAccess. Each Field Office or Global Partner has one or two GlobalAccess administrators. These administrators must create the user accounts within the GlobalAccess tool.

This document provides the information GlobalAccess administrators need to create user accounts and grant access to Compassion Connect and the Translator Portal.

# Granting, Revoking, and Editing User Access through GlobalAccess

The following sections explain how to log in, and then how to grant, remove, or edit other user's access in the GlobalAccess tool. Granting access in GlobalAccess allows the user to login to Compassion Connect via the external site. This access must be removed when no longer needed.

## Logging in to GlobalAccess

You are ready to log in to GlobalAccess to begin provisioning the user accounts.

### To log in to GlobalAccess, do the following:

1. Type in the following address in the internet search bar: <https://globalaccess.ci.org>.
2. If new to GlobalAccess, A welcome message appears with the License Agreement. You can click on the PDF to open the License Agreement. After reading the PDF, if you agree, check the box next to **"I have read and agree with the License Agreement."**
3. Click **Login**. The external login section will appear.
4. Click on one of the following three buttons: **Sign in with Microsoft**, **Sign in with Google**, or **Sign in with Facebook**. Choose the correct email provider based on your email address. The appropriate login window will appear.
5. Enter your external login username and password (Microsoft, Google, or Facebook). Click **Next** or **Sign in**. A permission message will appear.



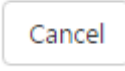
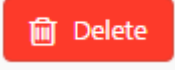



**Note:** Logging in will not provide GlobalAccess with your credentials. Your password will remain private.

6. Click **GlobalAccess Internal**. A Language selection page appears.
7. Select your preferred language from the drop-down list. **Note:** This will display if the user has not previously logged in. Sometimes the system skips the step.

The home screen appears. You are now logged in.

## GlobalAccess Buttons

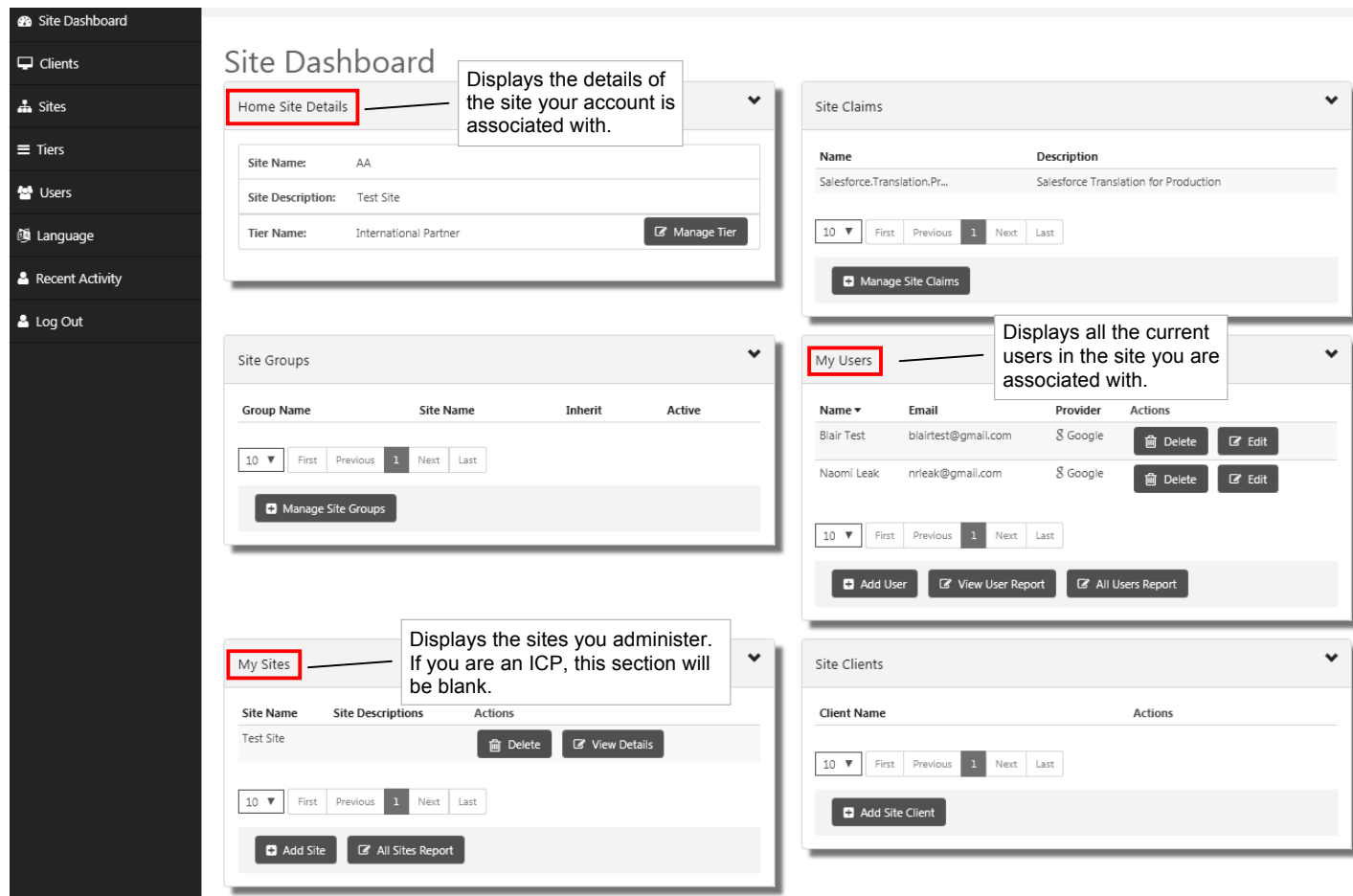
Below is a list and description of basic buttons you will see in GlobalAccess.

Button	Action	Example
Create	Creates a new User, etc. and returns the user to the previous page.	
Edit	Displays the page of the ICP user to edit.	
Cancel	Cancels the current action.	
Delete	Deletes the current user, claim or group from the system.	
Save	Saves the last action taken.	
View Details	Allows the user to view the ICP information.	
View Parent	Allows the user to return to the Field Office from the ICP Record.	

## GlobalAccess Site Dashboard

Once you are logged in to GlobalAccess, the site dashboard will appear with the menu selections display on the left side of the page. You will add or remove users from GlobalAccess using this site dashboard. This dashboard lists all the tabs and buttons you need.

The site dashboard appears by default. You may also navigate to the site dashboard by clicking the site dashboard menu selection on the left. Figure 1 displays the site dashboard sections that pertain to GlobalAccess Administrators.



The screenshot shows the GlobalAccess Site Dashboard interface. On the left is a dark sidebar menu with options: Site Dashboard, Clients, Sites, Tiers, Users, Language, Recent Activity, and Log Out. The main content area is titled 'Site Dashboard' and contains several sections:

- Home Site Details:** A callout box points to this section, stating 'Displays the details of the site your account is associated with.' It shows fields for Site Name (AA), Site Description (Test Site), and Tier Name (International Partner), with a 'Manage Tier' button.
- Site Claims:** A table with columns 'Name' and 'Description'. One entry is 'Salesforce.Translation.Pr...' with description 'Salesforce Translation for Production'. It includes pagination controls and a 'Manage Site Claims' button.
- Site Groups:** A table with columns 'Group Name', 'Site Name', 'Inherit', and 'Active'. It includes pagination controls and a 'Manage Site Groups' button.
- My Users:** A callout box points to this section, stating 'Displays all the current users in the site you are associated with.' It shows a table with columns 'Name', 'Email', 'Provider', and 'Actions'. Two users are listed: Blair Test (blairtest@gmail.com, Google) and Naomi Leak (nrleak@gmail.com, Google). Each has 'Delete' and 'Edit' buttons. It includes pagination controls and buttons for 'Add User', 'View User Report', and 'All Users Report'.
- My Sites:** A callout box points to this section, stating 'Displays the sites you administer. If you are an ICP, this section will be blank.' It shows a table with columns 'Site Name', 'Site Descriptions', and 'Actions'. One entry is 'Test Site' with 'Delete' and 'View Details' buttons. It includes pagination controls and buttons for 'Add Site' and 'All Sites Report'.
- Site Clients:** A table with columns 'Client Name' and 'Actions'. It includes pagination controls and an 'Add Site Client' button.

**Figure 1: The ICP Site Dashboard**

## Steps to Verify Email Accounts

With the release of GlobalAccess, Compassion is excited to offer a new way to provide access to Compassion systems: the addition of external, non-Compassion, email accounts. This will allow Compassion to provide access to vital information quicker. However, this access will need to undergo some basic verification prior to the steps outlined in this document. Before granting access, GlobalAccess Administrators must:

1. Know who owns the Account.

2. Verify who owns the Account.

### Confirm account ownership

You must verify the integrity of the email account used to log in to GlobalAccess. Only the individual who needs to access Compassion's systems should own and have access to the email account. If this is currently a shared email account, then this person must create another email address in order to connect to GlobalAccess. The user must ensure that all Compassion information is secure and not viewed by anyone else.

### Arrange a verification with that user

You must verify the authenticity of the email address. An easy way to do this is to arrange a verification email from that user. For example, ask the user to send an email with the words "Certifying email address" in the body of the email. The user should send this from the email address that will be used to log in to GlobalAccess. By following these guidelines, you are protecting Compassion from possible undesired individuals accessing important key Information systems.

## Adding ICP or Translator Portal Users to the GlobalAccess System

You are now ready to add a user to GlobalAccess. The steps below outline the process for adding a new user. This is done by adding a user to a "Site". To begin, you must navigate to the site user will exist in. If the user already exists in GlobalAccess in the correct Site, skip to [2.3 Granting User Rights in GlobalAccess](#).

### To add a user to GlobalAccess, do the following:

1. On the site dashboard, locate the My Users section.
2. Click **Add User**. The **Add User** page displays.
3. Enter the required information.
4. Click **Create**.

**Information needed for ICP users:** Name (first and last), non-Compassion email (important- this must match the email address in the Salesforce Contact record setup against an ICP account), and provider (ex., Google, Facebook, Microsoft).

**Information needed for translator portal users:** Name (first and last), non-Compassion email, and provider (ex., Google, Facebook, Microsoft).

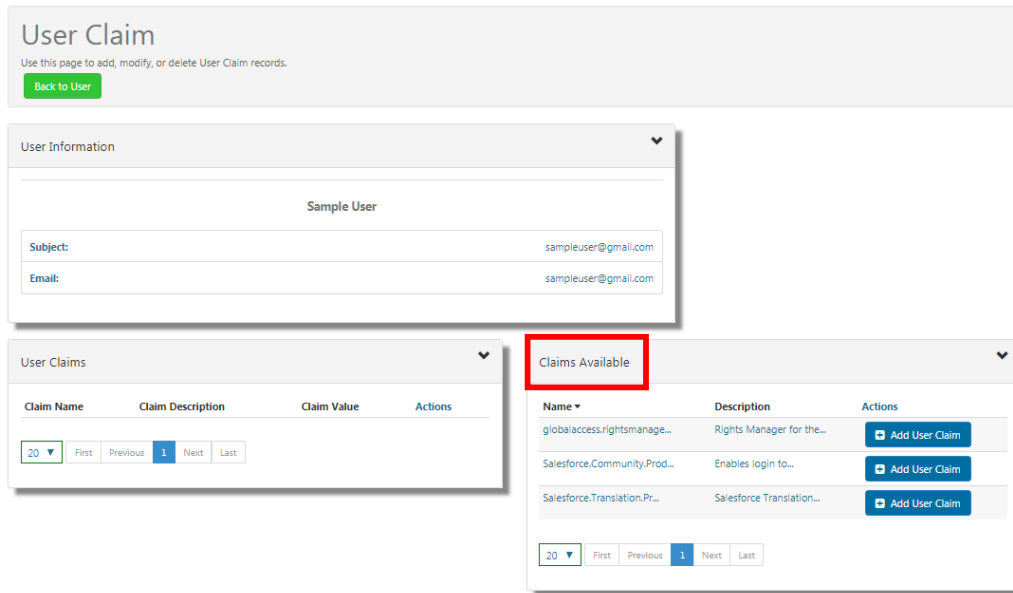
## Granting or Revoking ICP or Translator Portal User Claims in GlobalAccess

Now that the user is added and all user information is correct, you are ready to assign "rights" to the user. These rights allow the user to access GlobalAccess. You may also revoke current user rights if required.

**Note:** You must establish these settings for each Translator Portal user in order for them to have access to the correct functionality within the Translator Portal in Compassion Connect.

### To grant rights to a user, do the following:

1. From the site dashboard, locate the **My Users** section.
2. Select the user you wish to grant rights to and click **Edit**. This opens the **Edit User** page.
3. Confirm the “**Enabled**” box is checked. This grants the user access.
4. At the bottom of the page, click **Add Claims**. The **User Claim** page will appear (pictured below). A ‘claim’ refers to the specific configuration settings for an individual user, such as role, etc.



**Figure 2: The User Claim page. The “Claims Available” section displays all possible claims you can add to a user.**

5. Under **Claims Available**, determine which claim needs to be added, then click **Add User Claim**. This will bring up the **Add User Claim** page.
6. Check the **Active** box.
7. Click **Create** to grant the user access to the group. On the **User Group** page, the new user group will appear.

**To temporarily revoke rights from a user, do the following:**

1. In the **My Users** section of the site dashboard, choose a user and click **Edit**.
2. Uncheck the **Enabled** checkbox.
3. Click **Update**.

**Important Note:** Unchecking the **Enabled** box will prevent the user from accessing the application.



## Delete a User from GlobalAccess

If you need to permanently remove a user from GlobalAccess, you can delete the user from the system. This will completely remove their access and information from the system.

### To delete a user, do the following:

1. In the **My Users** section of the site dashboard, choose a user and click **Edit**.
2. Click Add Claims.
3. Under the **User Claims** section, determine which claim needs to be deleted and click **Delete** next to it.
4. Confirm the deletion. Click **OK**.

## Editing Current Active ICP or Translator Portal User Information in GlobalAccess

### To edit a user's information, do the following:


1. On the site dashboard, locate the **My Users** section.
2. In the My Users section, find the user you wish to edit and click **Edit**.
3. To change the name or email, enter the changes in the appropriate fields.
4. Click **Update**.

**Note:** If you change the email here, you will need to create a new contact in Compassion Connect. Updating the same contact with a new email address will not work as it has a previous user assigned to it.

## Running Reports on ICP or Translator Portal Users in GlobalAccess

Running reports in GlobalAccess allows you to see all users at your site and at ICPs. This can be helpful for reviewing who has access to Salesforce and the Translator.

### To view a report on all users at your site (Translators), do the following:

1. From the site dashboard, locate the **My Users** section.
2. Click **View User Report**.
3. In the right corner of the user table, click on the data exporting menu icon  (pictured in Figure 3). A drop-down menu will appear.
4. In the menu, select which export option you would like to use.

Name	Email	
Sample User	sampleuser@gmail.com	<div style="border: 1px solid red; padding: 2px;">☰</div> <ul style="list-style-type: none"> <li>Export all data as csv</li> <li>Export visible data as csv</li> <li>Export all data as pdf</li> <li>Export visible data as pdf</li> <li>Columns:</li> <li>✓ Name</li> <li>✓ Email</li> </ul>
Sample User 1	sampleuser1@email.com	
Sample User 2	sampleuser2@email.com	
Sample User 3	sampleuser3@email.com	
Sample User 4	sampleuser4@email.com	
Sample User 5	sampleuser5@email.com	
Sample User 6	sampleuser6@email.com	
Sample User 7	sampleuser7@email.com	
Sample User 8	sampleuser8@email.com	
Sample User 9	sampleuser9@email.com	

**Figure 3: The Data Exporting Menu**

**To view a report on all users at ICPs and your site (Translators), do the following:**

1. From the site dashboard, locate the **My Users** section.
2. Click on **All Users Report**.
3. In the right corner of the user table, click on the data exporting menu icon ☰ (pictured in Figure 3). A drop-down menu will appear.
4. In the menu, select which export option you would like to use.