

# Add Organisation Staff

## Grant Recipient Portal Task Card

**Portal Access required:** Administrator

The Grant Recipient Portal (Portal) enables grant recipients to add staff from their Organisation to the Portal.

This task card describes the process of adding Organisation staff as contacts to the Portal including system validations to assist with reducing duplicate contacts from being added.

### Access levels for the Portal

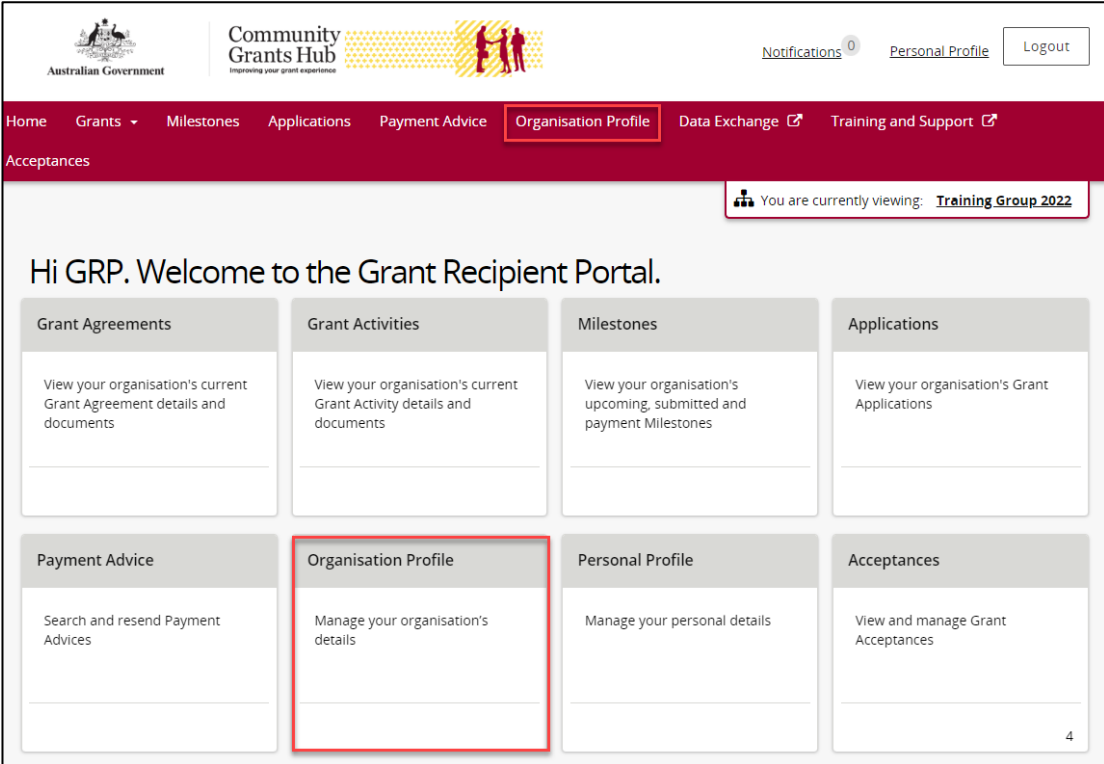
- Organisation **Viewer** – The staff member can view various screens but will not be able to add details or make any changes
- Organisation **Editor** – The staff member can add details and make changes on selected available screens
- Organisation **Administrator** (the highest level of access) – The staff member can add details and make changes on all available screens.

**Note:** the access level of **No Access** is to be used for staff members who do not require access to the Portal but need to be added as an Organisation contact so they can be assigned to grant agreements or grant activities.

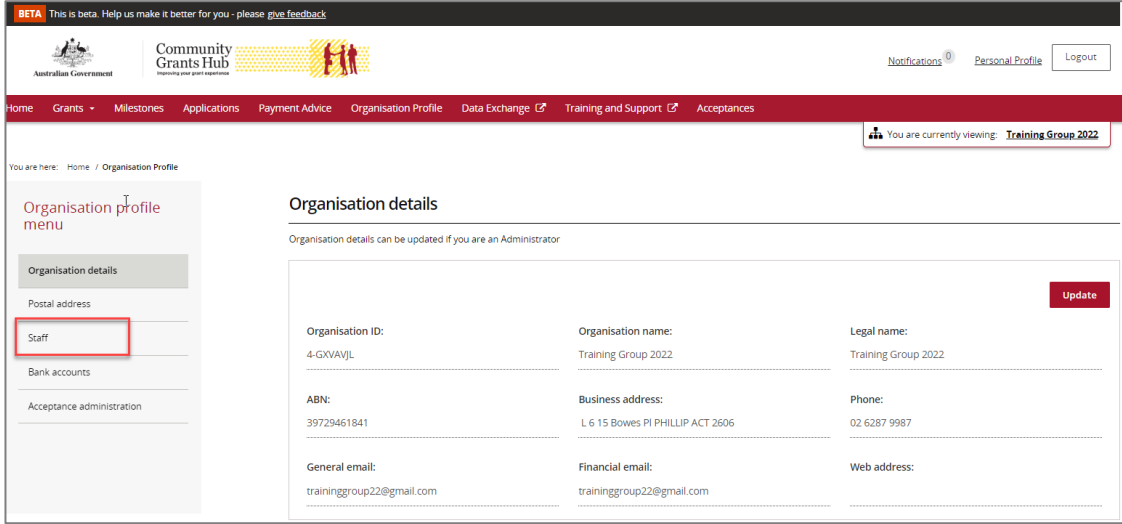
The table below details the functionality for each access level:

Portal Functionality	Organisation Viewer	Organisation Editor	Organisation Administrator
Update Bank Accounts (certain information only)	No	No	Yes
Give staff access to the Portal	No	No	Yes
Create / edit staff	No	No	Yes
Edit Organisation details	No	No	Yes
Accept funding offers or variations (if set up as a signatory)	No	Yes	Yes
Submit Reporting Obligations	No	Yes	Yes
Update personal profile	Yes	Yes	Yes
View grant information	Yes	Yes	Yes

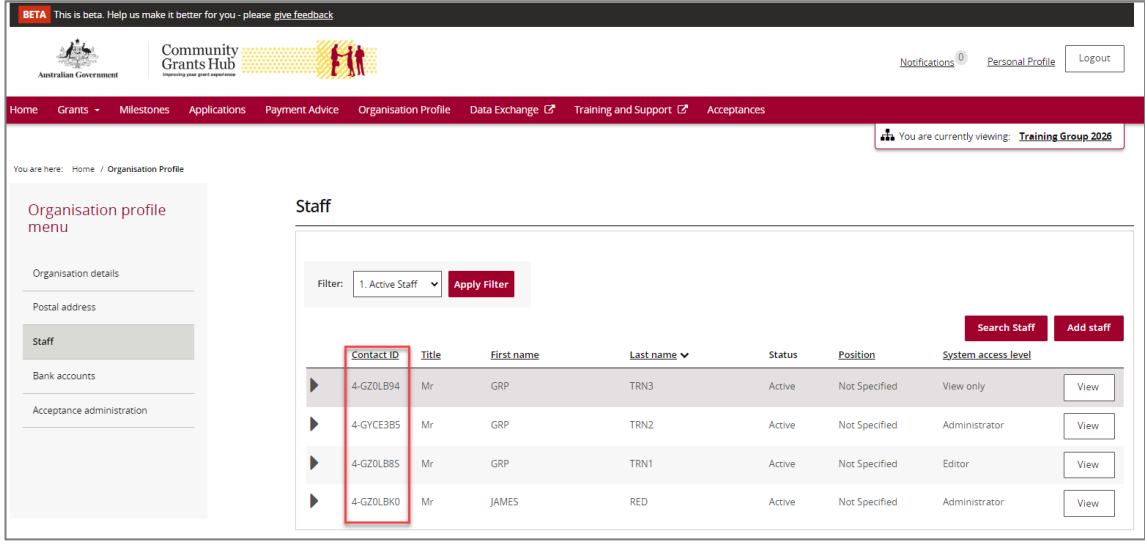
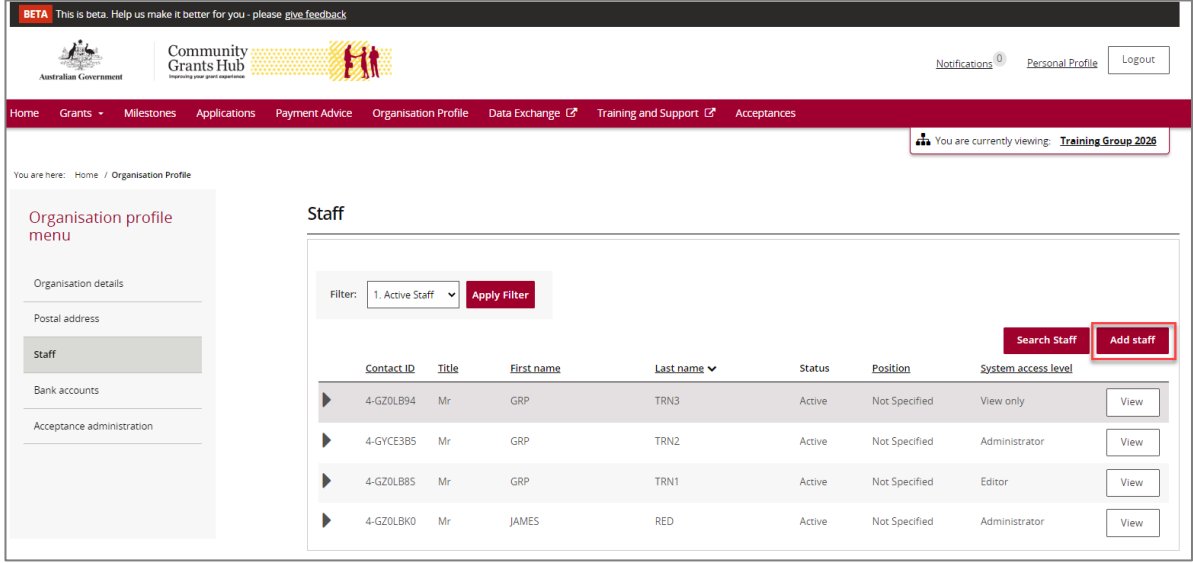
## Adding Staff in the Portal

Step	Action
1	<p>From the Home screen, select the <b>Organisation Profile</b> tile. Alternatively, select the <b>Organisation Profile</b> link from the Navigation menu.</p>  <p>The screenshot shows the Community Grants Hub portal. At the top, there is a header with the Australian Government logo, the Community Grants Hub logo, and navigation links for Notifications (0), Personal Profile, and Logout. Below the header is a navigation menu with links for Home, Grants, Milestones, Applications, Payment Advice, Organisation Profile (highlighted with a red box), Data Exchange, and Training and Support. The main content area displays a welcome message: "Hi GRP. Welcome to the Grant Recipient Portal." Below this are eight tiles: Grant Agreements, Grant Activities, Milestones, Applications, Payment Advice, Organisation Profile (highlighted with a red box), Personal Profile, and Acceptances. The Organisation Profile tile contains the text "Manage your organisation's details".</p>
2	<p>The Organisation Profile screen will display. Select <b>Staff</b> from the Organisation profile menu to display the Organisation's Staff screen.</p>

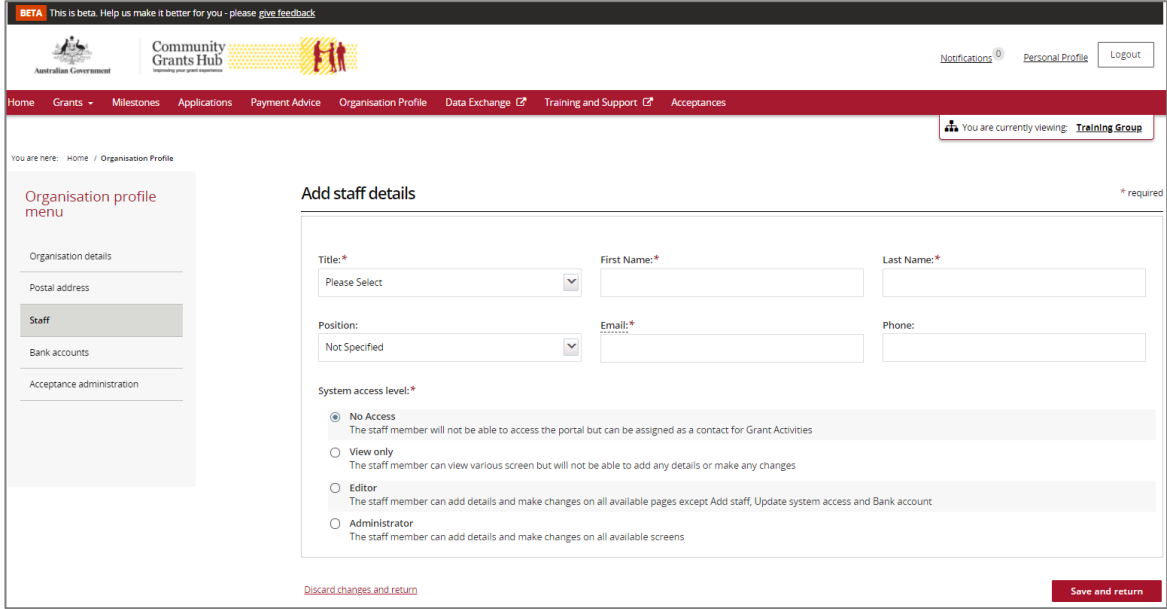
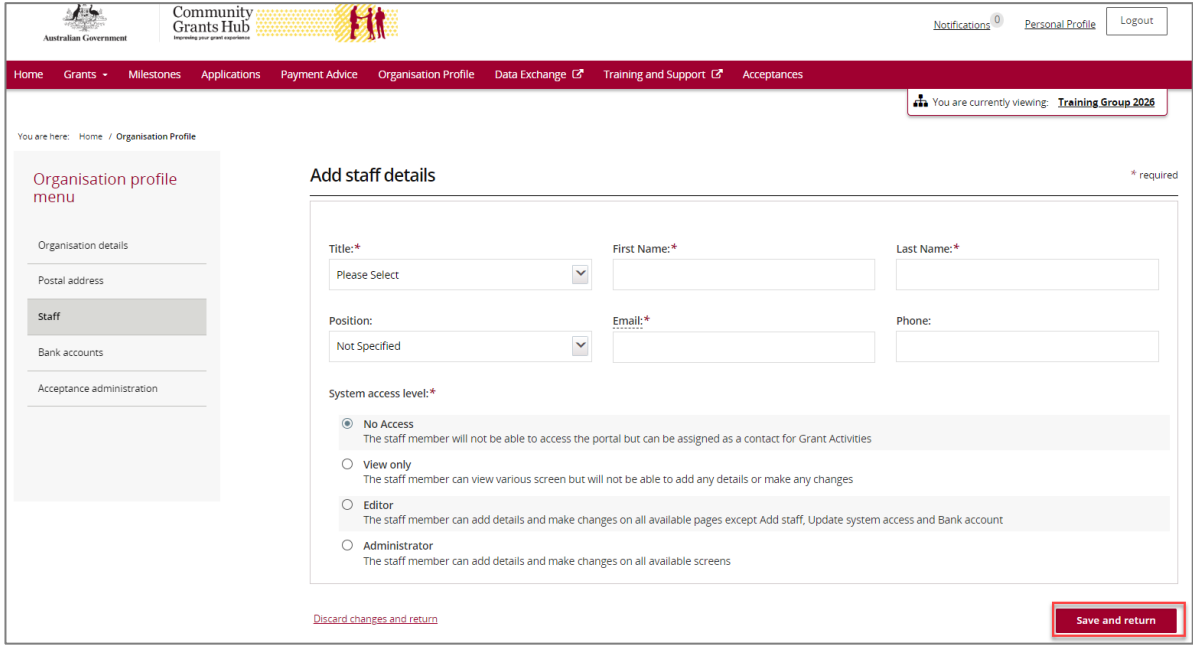


Step	Action
	
3	<p>The Organisation's Staff screen will display. This screen displays Active Staff for the organisation by default. The Staff list can be filtered using the <b>drop down</b> menu to choose one of the following:</p> <ol style="list-style-type: none"><li>1. Active Staff</li><li>2. Inactive Staff</li><li>3. All Staff</li></ol> <p><b>Note:</b> All staff records display a unique Contact ID. This ID can be very helpful for identification purposes in various areas and assisting with duplicate contacts.</p> <p>You can view the <b>Contact ID</b> from the Staff screen.</p>



Step	Action																																			
	 <p>The screenshot shows the 'Staff' section of the Community Grants Hub. A table lists staff members with columns for Contact ID, Title, First name, Last name, Status, Position, and System access level. The 'Contact ID' column is highlighted with a red box. The table contains the following data:</p> <table border="1"><thead><tr><th>Contact ID</th><th>Title</th><th>First name</th><th>Last name</th><th>Status</th><th>Position</th><th>System access level</th></tr></thead><tbody><tr><td>4-GZ0LB94</td><td>Mr</td><td>GRP</td><td>TRN3</td><td>Active</td><td>Not Specified</td><td>View only</td></tr><tr><td>4-GYCE3B5</td><td>Mr</td><td>GRP</td><td>TRN2</td><td>Active</td><td>Not Specified</td><td>Administrator</td></tr><tr><td>4-GZ0LB85</td><td>Mr</td><td>GRP</td><td>TRN1</td><td>Active</td><td>Not Specified</td><td>Editor</td></tr><tr><td>4-GZ0LBK0</td><td>Mr</td><td>JAMES</td><td>RED</td><td>Active</td><td>Not Specified</td><td>Administrator</td></tr></tbody></table>	Contact ID	Title	First name	Last name	Status	Position	System access level	4-GZ0LB94	Mr	GRP	TRN3	Active	Not Specified	View only	4-GYCE3B5	Mr	GRP	TRN2	Active	Not Specified	Administrator	4-GZ0LB85	Mr	GRP	TRN1	Active	Not Specified	Editor	4-GZ0LBK0	Mr	JAMES	RED	Active	Not Specified	Administrator
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4	<p>To add a new staff member select <b>Add staff</b>.</p>  <p>The screenshot shows the 'Staff' section of the Community Grants Hub. The 'Add staff' button is highlighted with a red box. The table contains the same data as the previous screenshot.</p>																																			
5	<p>The Add staff details screen will display.</p> <p>Enter the staff member's details in the required fields including the Portal system access level required. Mandatory fields are marked with a red asterisk.</p>																																			

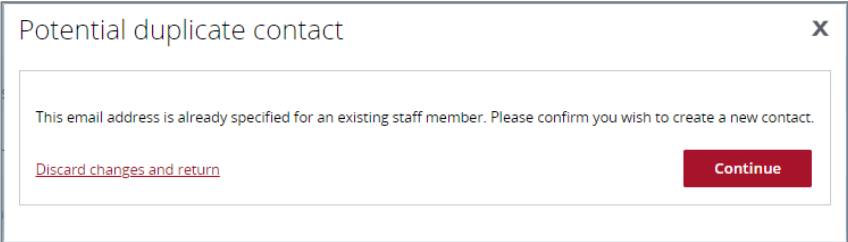


Step	Action
	
6	<p>Select <b>Save and return</b> when complete.</p> 
7	<p>If the change is successful, a message will temporarily display on screen confirming the staff member was successfully added as a contact for your Organisation. The added contact will now be listed on the Staff screen under the Organisation Profile.</p>



Step	Action																																																																
	<p data-bbox="268 472 810 571"></p> <p data-bbox="268 593 973 627">Your Staff member has now been added as a contact.</p> <div data-bbox="268 645 1476 1310"><p data-bbox="279 784 462 806">You are here: Home / Organisation Profile</p><p data-bbox="295 828 446 862">Organisation profile menu</p><ul data-bbox="295 896 470 1064" style="list-style-type: none"><li>Organisation details</li><li>Postal address</li><li><b>Staff</b></li><li>Bank accounts</li><li>Acceptance administration</li></ul><p data-bbox="582 817 622 840">Staff</p><p data-bbox="598 907 813 929">Filter: 1 Active Staff <a href="#">Apply Filter</a></p><table border="1" data-bbox="590 952 1460 1288"><thead><tr><th>Contact ID</th><th>Title</th><th>First name</th><th>Last name</th><th>Status</th><th>Position</th><th>System access level</th><th></th></tr></thead><tbody><tr><td>4-GXYWERR</td><td>Captain</td><td>RAYMOND</td><td>HOLT</td><td>Active</td><td>Senior Manager</td><td>Editor</td><td><a href="#">View</a></td></tr><tr><td>4-H9M66TS</td><td>Master</td><td>STAFF 1 FIRST NAME</td><td>STAFF 1 LAST NAME</td><td>Active</td><td>Not Specified</td><td>No Access</td><td><a href="#">View</a></td></tr><tr><td>4-H9M66V0</td><td>Miss</td><td>STAFF 2</td><td>STAFF 2</td><td>Active</td><td>Not Specified</td><td>No Access</td><td><a href="#">View</a></td></tr><tr><td>4-H9M66W5</td><td>Master</td><td>STAFF 3</td><td>STAFF 3</td><td>Active</td><td>Not Specified</td><td>No Access</td><td><a href="#">View</a></td></tr><tr><td>4-GZOLB85</td><td>Mr.</td><td>GRP</td><td>TRN1</td><td>Active</td><td>Not Specified</td><td>Editor</td><td><a href="#">View</a></td></tr><tr><td>4-GYCE3B5</td><td>Mr.</td><td>GRP</td><td>TRN2</td><td>Active</td><td>Not Specified</td><td>Administrator</td><td><a href="#">View</a></td></tr><tr><td>4-GZOLB94</td><td>Mr.</td><td>GRP</td><td>TRN3</td><td>Active</td><td>Not Specified</td><td>No Access</td><td><a href="#">View</a></td></tr></tbody></table><p data-bbox="375 1612 861 1657"><b>!</b> There are error(s) on the page</p><p data-bbox="375 1668 798 1691">The contact you are trying to add already exists in this contacts list.</p></div> <p data-bbox="268 1332 1396 1366">The following system validations are set up to prevent duplicate contacts being added:</p> <ol data-bbox="311 1388 1460 1467" style="list-style-type: none"><li><b>1. First Name, Last Name and Email Address matches an existing contact for the Organisation.</b></li></ol> <p data-bbox="359 1489 1476 1590">If the staff member already exists for your Organisation with the exact combination of First Name, Last Name and Email Address, the following error will occur. The system will not allow the staff member to be added.</p> <ol data-bbox="311 1736 1268 1780" style="list-style-type: none"><li><b>2. Email Address matches an existing contact for the Organisation.</b></li></ol> <p data-bbox="359 1792 1492 1937">If the email address entered matches an existing contact for your Organisation but the First Name/Last Name is different, a warning message will appear on screen. To proceed select <b>Continue</b> or to cancel the request select <b>Discard changes and return</b>.</p>	Contact ID	Title	First name	Last name	Status	Position	System access level		4-GXYWERR	Captain	RAYMOND	HOLT	Active	Senior Manager	Editor	<a href="#">View</a>	4-H9M66TS	Master	STAFF 1 FIRST NAME	STAFF 1 LAST NAME	Active	Not Specified	No Access	<a href="#">View</a>	4-H9M66V0	Miss	STAFF 2	STAFF 2	Active	Not Specified	No Access	<a href="#">View</a>	4-H9M66W5	Master	STAFF 3	STAFF 3	Active	Not Specified	No Access	<a href="#">View</a>	4-GZOLB85	Mr.	GRP	TRN1	Active	Not Specified	Editor	<a href="#">View</a>	4-GYCE3B5	Mr.	GRP	TRN2	Active	Not Specified	Administrator	<a href="#">View</a>	4-GZOLB94	Mr.	GRP	TRN3	Active	Not Specified	No Access	<a href="#">View</a>
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## Need Help?

For further assistance, contact the Grant Recipient Portal Helpdesk:

**Email:** [GRP.Helpdesk@communitygrants.gov.au](mailto:GRP.Helpdesk@communitygrants.gov.au)

**Phone:** 1800 020 283 (Option 5)

**Operating Hours:** Monday to Friday 9:00am – 5:00pm (AEST/AEDT)