eLINK Guidance Document

Managing Contacts and Organization Information

May 2020

> **Purpose**: This document provides basic guidance on how to manage contact and organization information in eLINK.

Search, View, Edit, Add, and Export Contacts

Contacts in eLINK are for users of eLINK, staff and boards/councils of the organizations of these users, state and federal agency staff, and potentially staff of organizations partnering with these contacts.

eLINK users can edit their own contact and primary organization information. Some users have **Contact Type** "**Manager**" credentials*, allowing them to edit their own contact and primary organization information, as well as editing contact information on behalf those staff members within their organization who do not have eLINK user accounts "Manager" users cannot edit contact information on behalf of staff within their organization who have eLINK user accounts. Contacts cannot be deleted by either the "Manager" or user credentials, this can only be done by submitting a request to the eLINKsupport@state.mn.us with the subject line of "Account Assistance."

Information for cooperators - the landowners or land occupiers that receive funding for implementation of practices - is recorded and stored separately with individual activities. Landowners and land occupiers are not contacts in eLINK. Users can search for and view any information on contacts within the database; however, editing of contacts is limited to the user's own information or those contacts within the user's primary organization who do not have eLINK user accounts, such as board members.

1. **To search for a contact**: in the main menu at the top of the Home screen, click **Contacts and Organizations**, then **Contacts**, then **Search Contacts**. The **Contacts Search** screen will appear.

   a. If you would like to see all contacts in the system, select the **Search** button and the results for all users in the eLINK database will appear in the grid below. Note: this search may take some time to complete.

   b. If you would like to filter for a specific contact(s), enter information in the autocomplete search fields (**First Name**, **Last Name**, or **Organization**). For example: if you start typing "j" in the **First Name** field, every first name in the **Contacts** database with a "j" in it, such as James and Benjamin, will appear in the drop down list for you to select a specific entry. You can also type in a partial word such as "ja" which will result in all names with a "ja" in it, such as Jack, Jason, Janna, Benjamin.

2. **To view a contact**: after entering your filter criteria, select the **Search** button and the results will appear in the grid below. Any contact that you have permission to view will have the view icon 🔍 Click the icon to view the contact's record.
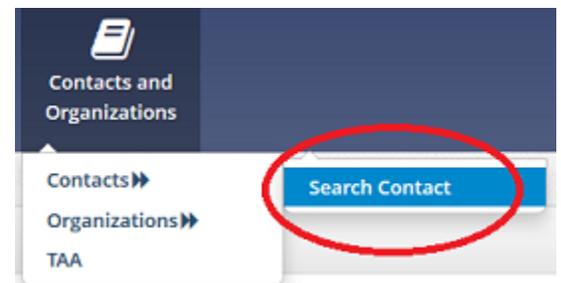
3. **To edit a contact**: after entering your filter criteria above, any contact you have permission to edit will have the ✏ icon. Clicking this icon will open the contact profile screen.

   a. The **Profile** section includes name, email and phone numbers.

   b. The **Organization** section where the organizations and contact types assigned to this contact can be viewed. Note: the **Organization** section can only be edited by BWSR staff.

   c. The **Address** section includes the addresses associated with this contact. To add a new address, click the "Add New Address" button below the **Profile** section. A dialogue box will open. Select **Org Address** to choose an address of the organization to which the contact is associated with. Or Select Custom Address to enter an address different from the organization's address. Click **Go** to open additional fields (repeat for as many addresses as necessary for the contact).

      i. **Primary Address**: Mark if the address is the primary address of the contact - this is the address BWSR will use for mailing communications. Only one address can be considered the primary address.

      ii. **Organization Address**: This field includes a dropdown of the addresses associated with the organization. Select the organization address which best fits the contact.

      iii. Click the **Save** button then click the **Close** button.

   b. To edit an existing address click the edit icon ✏ in the address grid for the contact and use the new address information above as guidance.

   c. Select the **Cancel/Go Back** button to return to the Contact search results.

4. **To add a new contact**: select the **Add New Contact** button from the **Contact Search** screen and a new record will appear in the **Profile** screen. Enter the required **Profile** information and click **Save**. The contact will be automatically assigned the user's primary organization and a Contact Type in the **Organizations** field, and the **Add New Address** feature will become available.

5. **To export contact**: exporting the results of a **Contact Search** is a new feature. Sort and filter capabilities within the system are limited; therefore, you may need to export a larger amount of information than desired and then sort or filter further after exporting.

   a. After a preliminary search, select the **Export Contact** button. A file with a Comma Separated Values (.csv) extension will be generated. The file will contain all of the address information for the records in the search results and it can be opened in Excel or saved. Note: if a contact has more than one address, there will be a row for each of the addresses of the contact.

Search and Edit Organizations

Organizations in eLINK include the organizations of all BWSR partners; however, a user can search for and edit only organizations that the user is associated with.

1. In the main menu at the top of the screen, click **Contacts and Organizations**, then **Organizations**, then **Search Organizations**. The **Organization Search** screen will appear.

2. To see all of the organizations you are associated with, select the **Search** button and the results will appear in the grid below, or enter information in the search criteria to filter by a specific organization.

3. Select the edit icon ✏ in the grid to view and edit specific basic organization information, such as meeting dates and location, website, etc. This information is used to populate the public page of eLINK. Grayed-out fields of the **Organization** screen can only be edited only by BWSR staff. Select the **Save** button to save the edits.

4. Select the **Add New Address** button to add or the edit icon ✏ to edit address information for the organization.

a. **Primary Address**: Mark if it is the primary address of the organization. This is the address BWSR will use for mailing communications. Only one address can be considered the primary address.

b. Enter the custom address data.

c. Click the **Save** button then click the **Close** button.

5. Select the **Cancel/Go Back** button to return to the Contact search results.

To Request Changes to Contacts or Organizations

To request a contact removal or changes to view-only items in contacts or organizations and/or to be associated with additional organizations, submit a request to eLINKsupport@state.mn.us with the subject line of "Account Assistance."

*The "**Manager**" role is available to SWCD, TSA, and NRCS users who are responsible for managing select information within the Technical Training portal of eLINK. This includes defining Organizational Priorities and entering Training Needs, Training History, and Credentials on behalf of staff within their organization who do not have eLINK accounts. More information can be found at https://bwsr.state.mn.us/elink-guidance-technical-training.