

Administrator guide

What is Connect?

Connect is the digital delivery platform that facilitates sending and receiving confidential messages and documents with one or multiple recipients. It enables seamless, secure collaboration with one or many customers, clients, colleagues, partners and suppliers through one common platform.

What is my role as an Connect administrator?

As an administrator, you are responsible for creating and managing accounts, as well as granting and removing access to Connect collaborators. A collaborator is an account user who can create conversations and invite other participants to collaborate.

What types of account can I create?

As an administrator of your organization's Connect service, you can create two types of account:

- a **collaborator account**, for use by only one person, or
- a **group account**, for use by several people.

Group accounts can be used for a variety of purposes and provide the following features in addition to those provided in collaborator accounts:

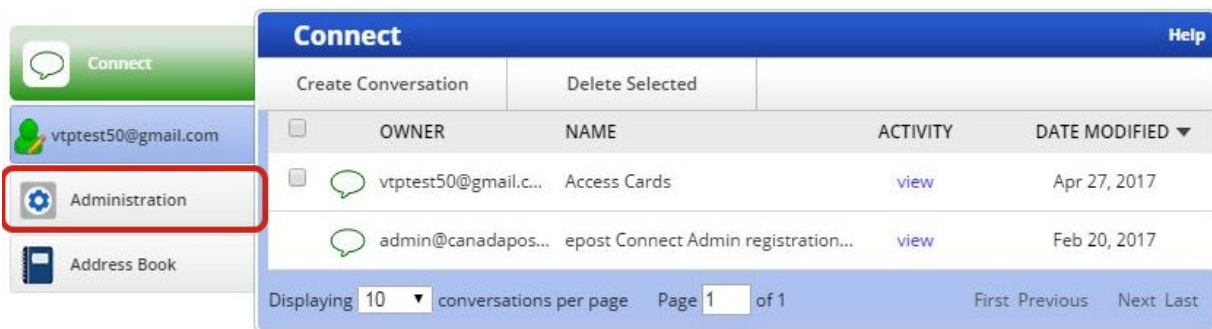
- Secure access to a shared account because all members of the group account log in to it with their own Canada Post profile username and password
- Access for group account members to any conversation created in the group account
- Anonymity for group account members as email notifications to non-members are marked as being sent by the group account persona (that is the group account email address), and not the individual
- Anonymity for group account members in the Activity audit trail as all actions taken in the group account are seen by non-members as being generated by the group account persona, and not the individual (However, group account members can identify which action has been taken by other group account members, as it is the individual personas that they will view in the Activity audit trail.)

NOTE: As an Connect administrator account email address cannot be part of a group account, it is strongly recommended to use a generic email address for the administrator account, and not the email address of a specific person or service

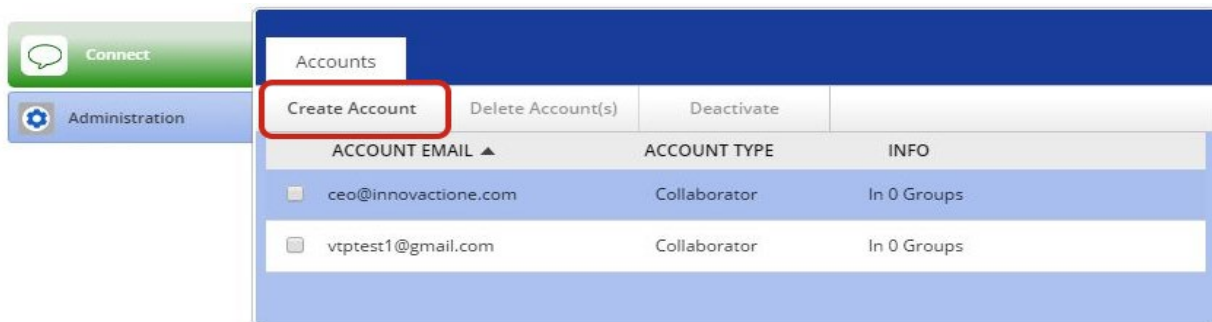
(To learn how to create a group account, go to page 3.)

How do I create a collaborator account?

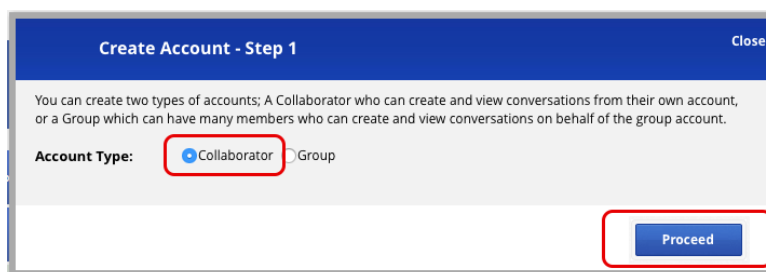
1. Sign in to your Canada Post online account
2. Click the **Administration** tab placed below the Connect tab.



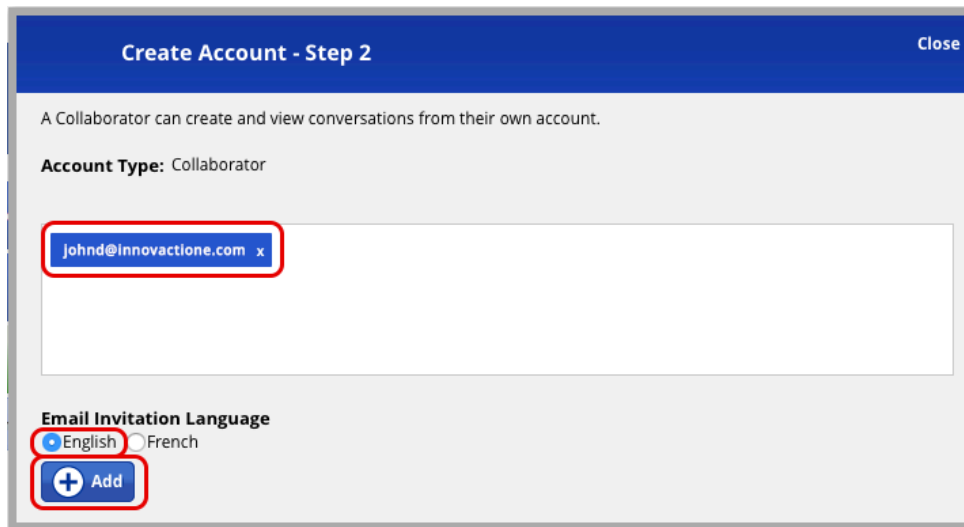
3. Select the **Create Account** link.



4. In the Create Account – Step 1 dialog box, select the **Collaborator account type** and click the **Proceed** button.



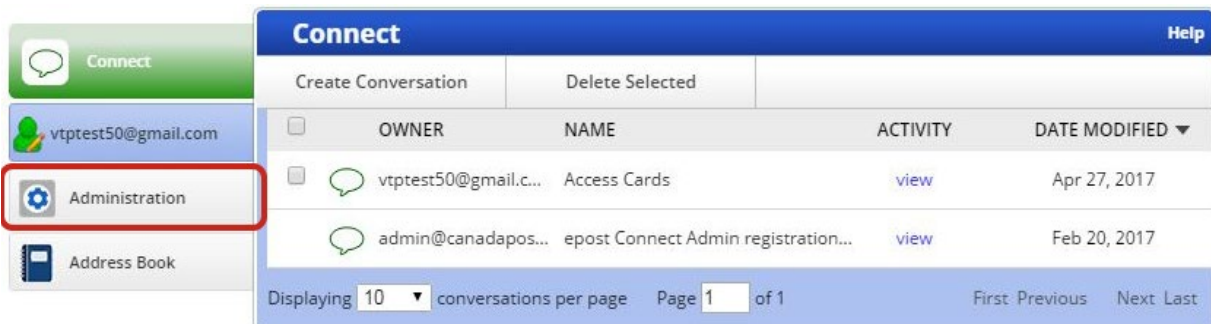
5. The Create Account – Step 2 dialog box will show on screen. Enter the email address of the new collaborator account user in the **address box**. Select the **Email Invitation Language** and click the **Add** button.



The collaborator account has been created. The system will automatically return you to your Connect home page.

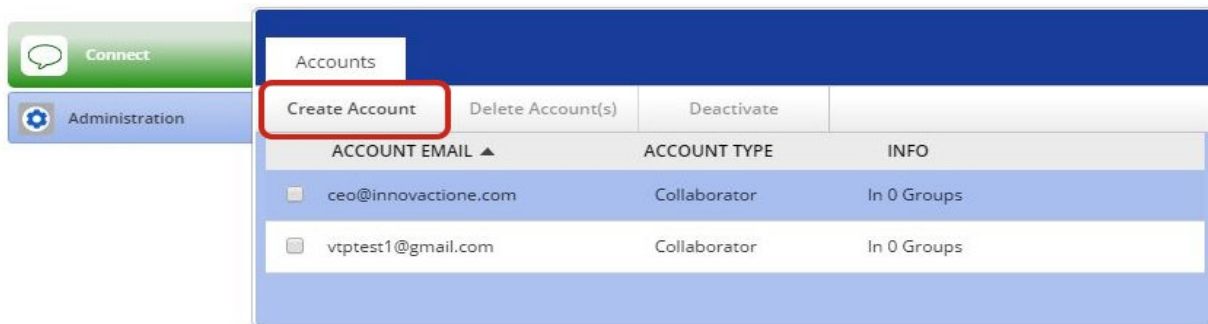
How do I create a group account?

1. Sign in to your Canada Post online account.
2. Click the **Administration** tab placed below the Connect tab.

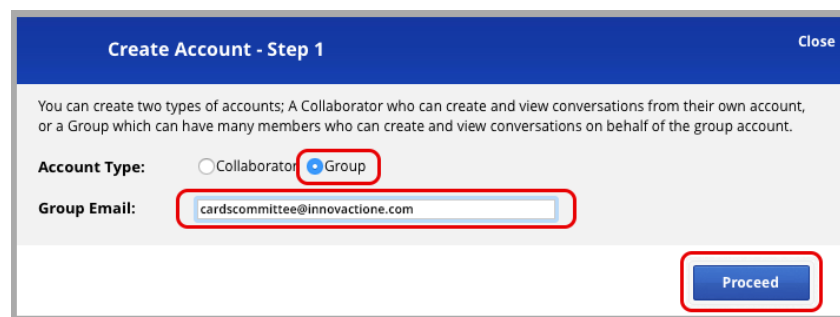


OWNER	NAME	ACTIVITY	DATE MODIFIED
vtptest50@gmail.c...	Access Cards	view	Apr 27, 2017
admin@canadapos...	epost Connect Admin registration...	view	Feb 20, 2017

3. Select the **Create Account** link.



4. In the Create Account – Step 1 dialog box, select the **Group account type** and enter the new **group account email address**. Click the **Proceed** button.

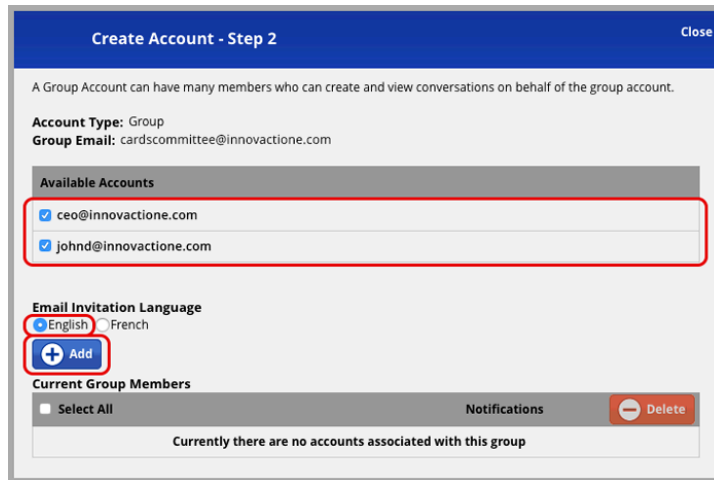


NOTE: If you need to set a distinct email address for the group account, please contact your organization's IT department to have one issued.

5. The Create Account – Step 2 dialog box will show on screen. Select the group account members from the **list of available collaborator accounts**.

NOTE: You can only select collaborator accounts that you have created as an administrator.

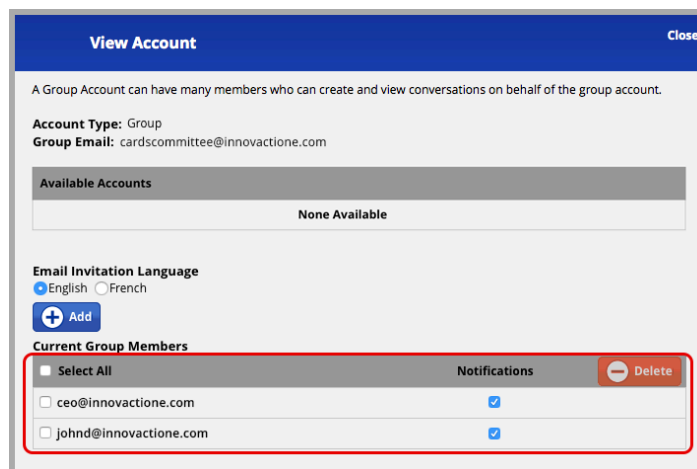
6. Select the **Email Invitation Language** and click the **Add** button.



The screenshot shows the 'Create Account - Step 2' interface. At the top, it says 'Create Account - Step 2' and 'Close'. Below that, it states 'A Group Account can have many members who can create and view conversations on behalf of the group account.' The 'Account Type' is 'Group' and the 'Group Email' is 'cardscommittee@innovactione.com'. Under 'Available Accounts', two email addresses are listed: 'ceo@innovactione.com' and 'johnd@innovactione.com', both with checked checkboxes. Below this, the 'Email Invitation Language' section has 'English' selected with a radio button and 'French' unselected. A blue '+ Add' button is highlighted with a red box. At the bottom, the 'Current Group Members' section has a 'Select All' checkbox, 'Notifications' text, and a 'Delete' button. A message at the bottom says 'Currently there are no accounts associated with this group'.

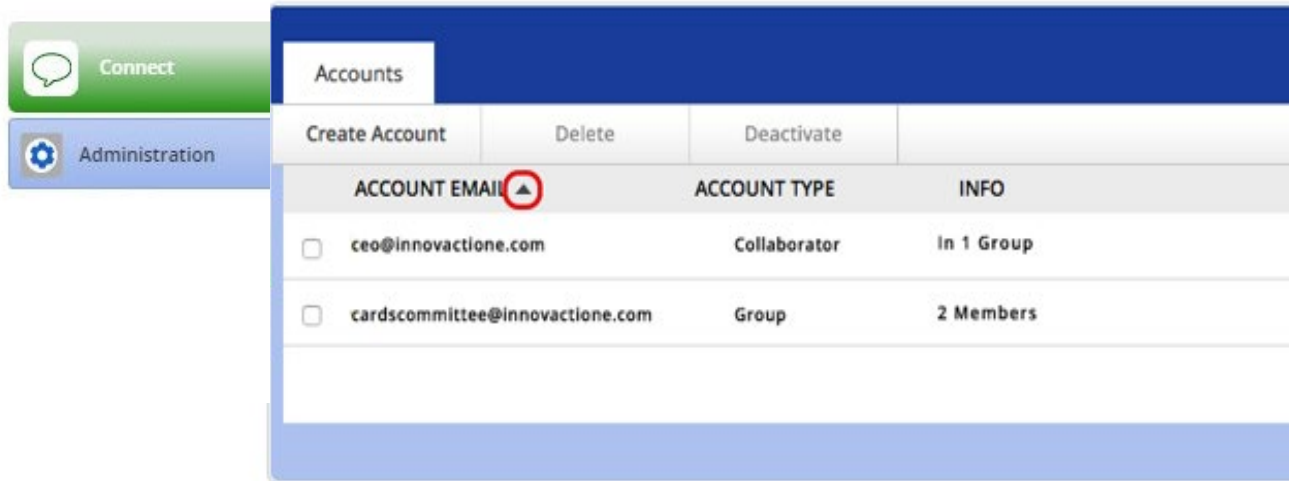
NOTE: Keep in mind that all collaborators entered will receive the email invitation in the selected language. If needed, you may send invitations in the other language by inviting those collaborators to the group after it has been created.

7. The email addresses of the group account members will show under **Current Group Members**. Click on **Close** to return to your Connect home page.

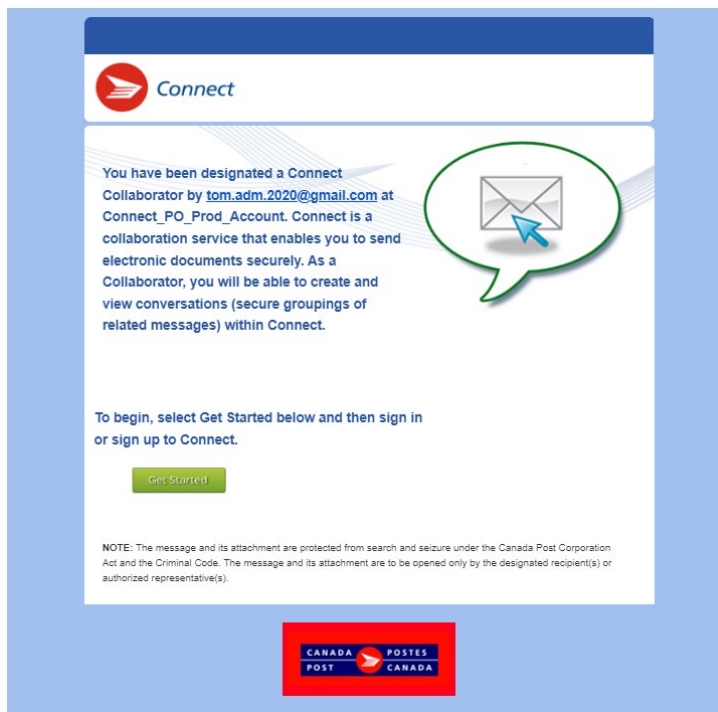


The screenshot shows the 'View Account' interface. At the top, it says 'View Account' and 'Close'. Below that, it states 'A Group Account can have many members who can create and view conversations on behalf of the group account.' The 'Account Type' is 'Group' and the 'Group Email' is 'cardscommittee@innovactione.com'. Under 'Available Accounts', it says 'None Available'. Below this, the 'Email Invitation Language' section has 'English' selected with a radio button and 'French' unselected. A blue '+ Add' button is present. At the bottom, the 'Current Group Members' section has a 'Select All' checkbox, 'Notifications' text, and a 'Delete' button. A table below shows two members: 'ceo@innovactione.com' and 'johnd@innovactione.com', both with checked checkboxes. The table is highlighted with a red box.

The newly created group account will show on your Connect home page.
 To set the accounts in alphabetical order, simply click on the arrow next to **ACCOUNT EMAIL**.



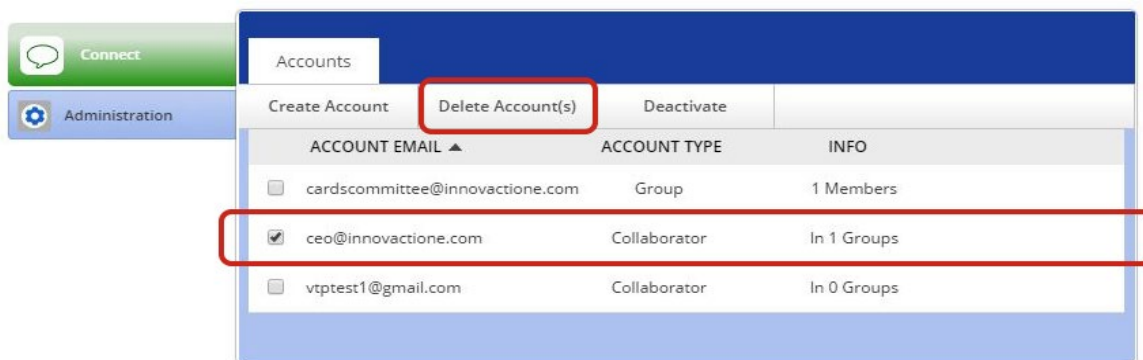
All group account members will receive an email invitation to activate their access to Connect through their account.



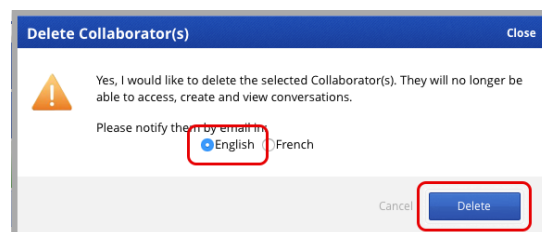
For information on how to use Connect, feel free to forward Canada Post's Connect Collaborator Guide to account members.

How do I delete an account?

1. Select the **account email address** in the list of accounts. If needed, you can select more than one account to be deleted.
2. Click on **delete**

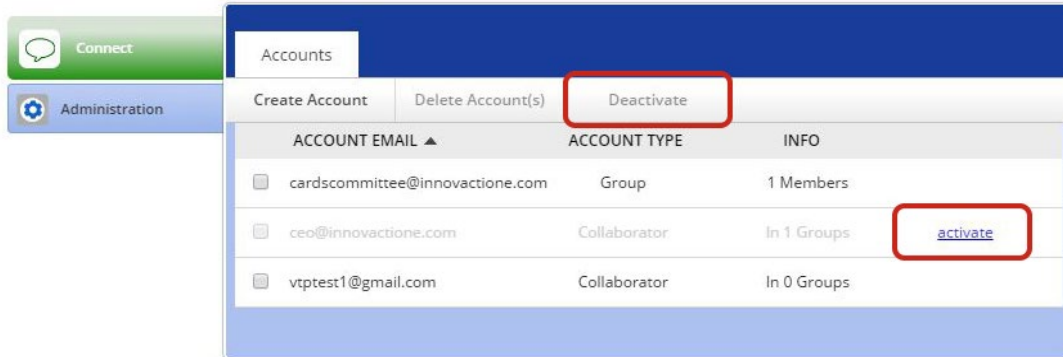


3. In the Delete Collaborator(s) dialog box, select the **email notification language** (please refer to note on page 5) and click the **Delete** button.



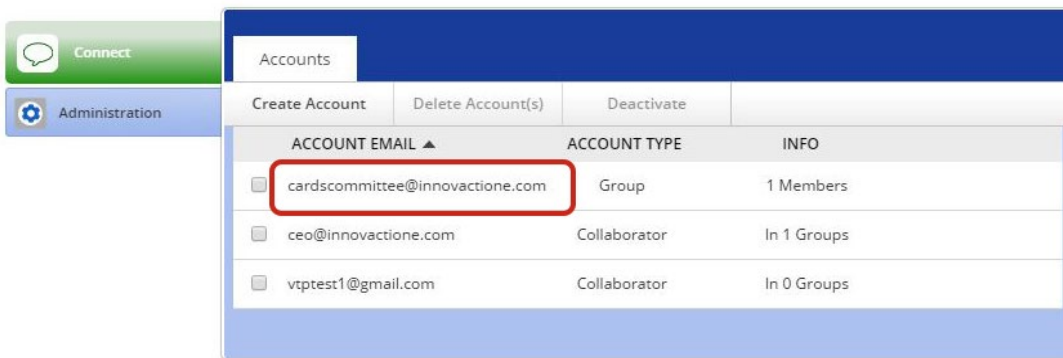
The selected accounts will be deleted from your organization's Connect service.

Deleted accounts are permanently removed from your license. If you want to temporarily end access to Connect for certain users, follow the same steps using the link **Deactivate**. You may reactivate the account at your convenience.



How do I add members to a group account?

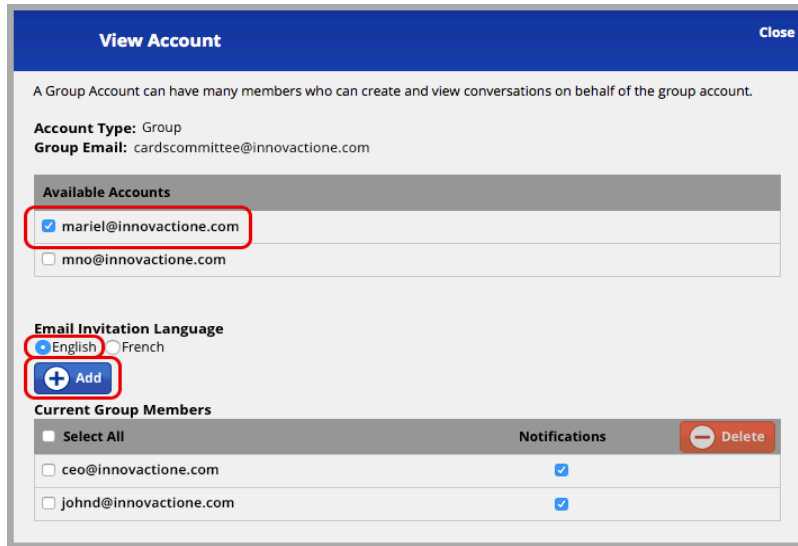
1. Select the **group account email address** in the list of accounts.



2. In the View Account dialog box, select the members from the **list of available collaborator accounts**

NOTE: Only collaborator accounts that the administrator created can be added to the group.

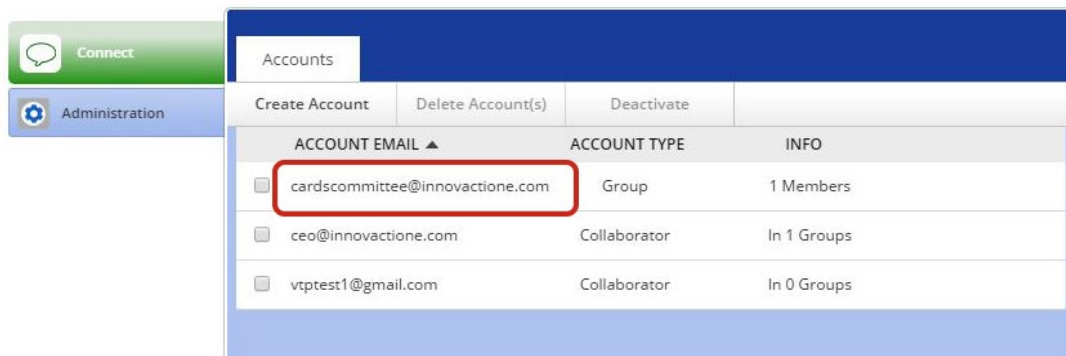
3. Select the **Email Invitation Language** (*please refer to note on page 5*) and click the **Add** button.



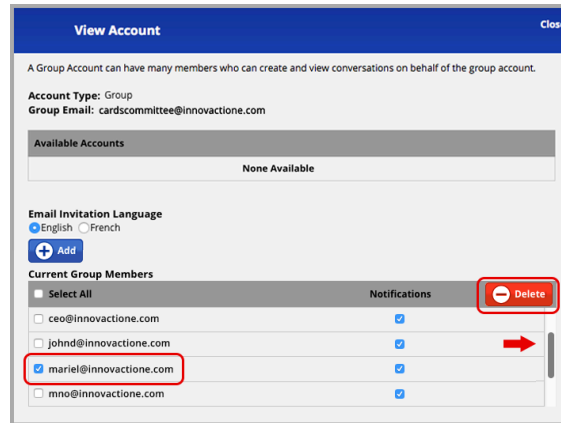
The new group account members will show under **Current Group Members**. Click on **Close** to return to your Connect home page.

How do I delete members from a group account?

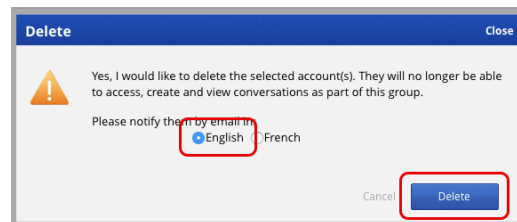
1. Select the **group account email address** in the list of accounts.



2. The View Account dialog box will show on screen. Select the email address of the members you want to delete from the group account under **Current Group Members**. (If you don't see all email addresses, use the cursor at the right to scroll down the list.) Click the **Delete** button.



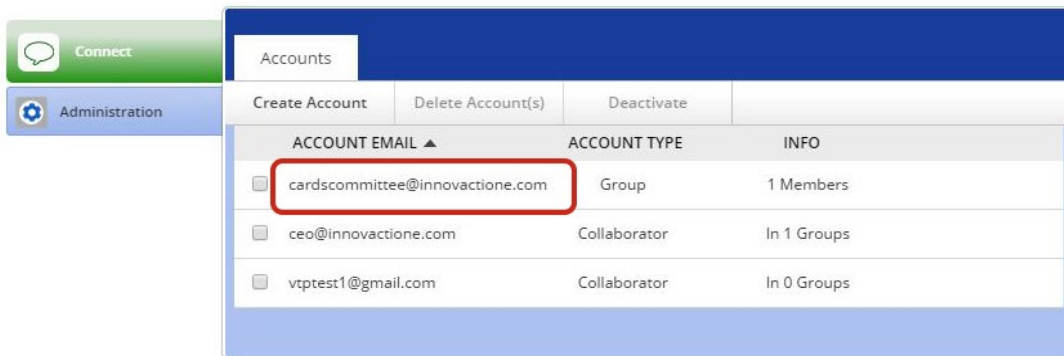
3. In the Delete dialog box, select the **email notification language** (please also refer to note on page 5) and click the **Delete** button



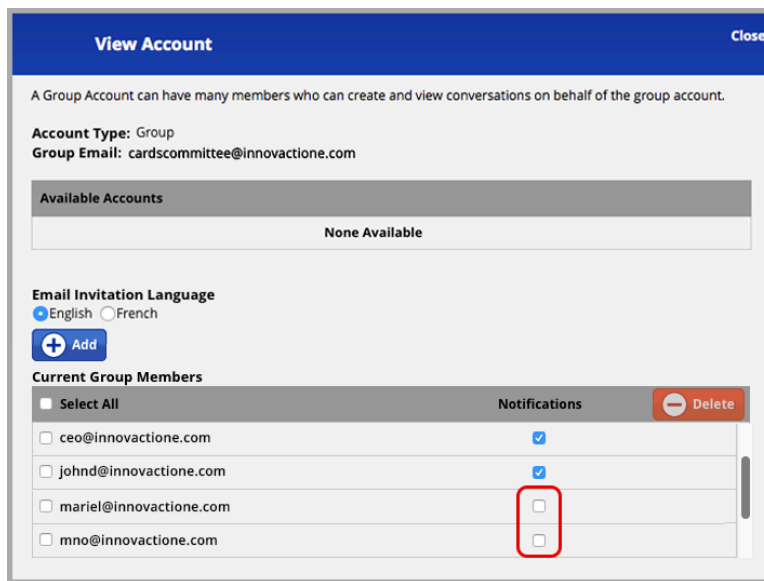
4. The deleted email addresses are permanently removed from the group account. Click on Close to return to your Connect home page.

How do I eliminate sending notification emails to group account members?

1. Select the group account email address in the list of accounts.



2. Uncheck the box under **Notifications** for each account member you don't want to be notified each time a person is being added to the group account or deleted from it.



If you experience technical difficulties with the Connect service, please contact Customer Service at 1-877-376-1212 (available 24 hours a day).

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