

# Springboard to Success

## Activities Book – Advanced Hub Techniques

*In the past two sessions, you've identified the information that you want to keep updated. In this session, we will discuss how to set up a cadence of reminders and a method for your franchisees to update their own information.*

This book gives you the steps to:

- Controll access to folders with Roles
- Mark documents as Recommended to draw attention to them
- Use URLs to give access to hub documents

We invite you to use these instructions, to submit questions to [training@franconnect.com](mailto:training@franconnect.com), and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: <https://tinyurl.com/677y7tz8>.

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## Managing Access Control for Hub Folders

You can restrict the access to certain hub information to only those users who need it. This helps to keep the user interface cleaner and simpler, and prevents access to unauthorized material. To manage access, you must define roles for your corporate, brand (if multi-brand), Regional, and Franchisee users users' profile. One user may be assigned to several roles, so assign all roles that apply.

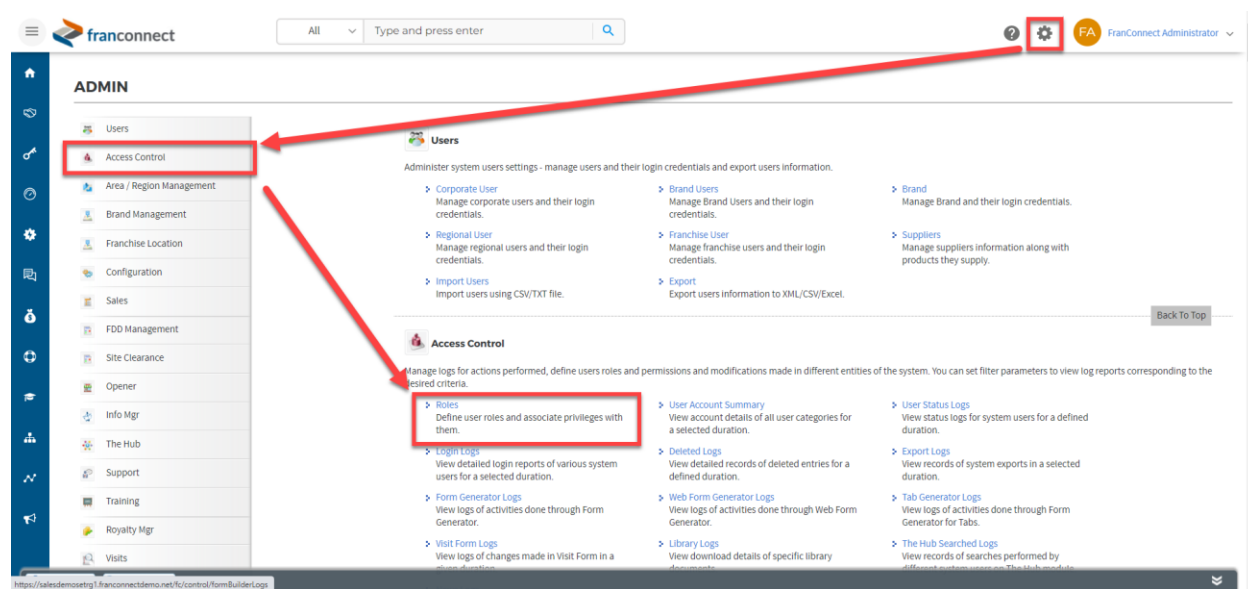
An example of role-based access restriction might be to provide special information to Master Franchisees or Area Reps.

Setting up limited access requires these steps:

1. Set the roles that will have special permission.
2. Assign the roles to the users who will have those permissions.
3. Create folders and limit access to the appropriate roles.

### Set up a Role

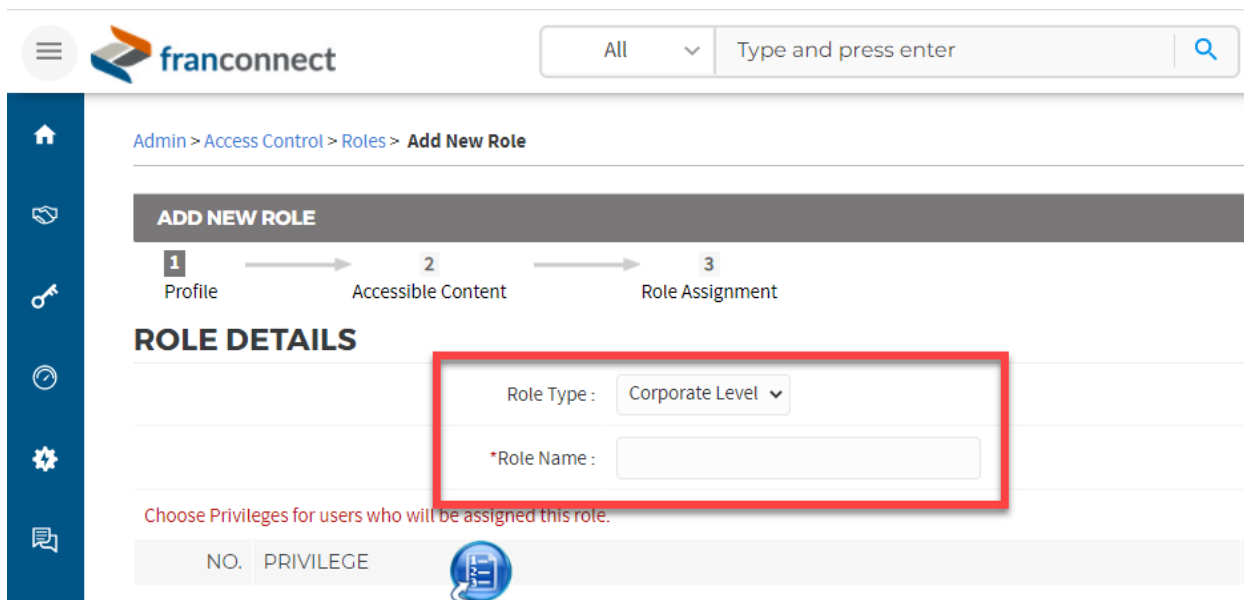
To set up roles, go to Admin > Access Control > Roles.



Choose to add a new role. Best practice: add a new role and remove all permissions but those to view the hub. Since users enjoy all the combined permissions of the roles they are assigned to, current users will retain their other permissions after being assigned to this role.



Select what kind of role it is (Corporate, Regional, Franchisee) and give the role a name. For purposes of assigning permissions to a folder, the recommended practice is to give the role the same name as the folder it has access to. If you have a group of people who will have restricted access to several folders, you can add the name of that group instead.



In the permissions page, uncheck the box in the header of the permissions list to remove all permissions from the role. Then, navigate to the Hub using the blue navigation ball, to restore Hub permissions. This ensures that you do not accidentally give extra permissions to users along with the folder permission.

Admin > Access Control > Roles > Add New Role

**ADD NEW ROLE**

1 Profile → 2 Accessible Content

**ROLE DETAILS**

Role Type :  
\*Role Name :

Choose Privileges for users who will be assigned

NO. PRIVILEGE

Corporate Level Privileges

1 Can Manage Administrator  
Can Administer Users  
# Can Manage Corporate User  
# Can Manage Brand Users  
# Can Manage Regional User  
# Can Manage Franchise User  
# Can Manage Supplier

1. Can Manage Administrator  
2. Can Manage Marketing Administrator  
3. Can Manage Personal Settings  
4. Can Access Site Clearance  
5. Can Access Info Mgr  
6. Can Access SmartConnect  
7. Can Access Financials  
8. Can Manage Opener  
9. Can Access Sales Information  
10. Can Manage The Hub  
11. Can Manage Support  
12. Can Manage Training  
13. Can Manage Print Ads  
14. Can Access CRM  
15. Can Manage Shop Module  
16. Can Manage Planner  
17. Can Manage Social  
18. Can Manage Listings  
19. Can View Dashboard  
20. Can Manage Reputation  
21. Can View Customer Surveys  
22. Can Manage Landing Pages  
23. Can Access Calendar  
24. Can Access BI  
25. Can Access Operations  
26. Can Manage Playbook Settings  
27. Can Access Command Center  
28. Can Access Teams

Fields marked with \* are mandatory.

DESCRIPTION	
Grants access to Administer module	<input checked="" type="checkbox"/>
Grants access to Admin Users section	<input checked="" type="checkbox"/>
Grants access to Admin Corporate User	<input checked="" type="checkbox"/>
Grants access to Admin Brand Users	<input checked="" type="checkbox"/>
Grants access to Admin Regional User	<input checked="" type="checkbox"/>
Grants access to Admin Franchise User	<input checked="" type="checkbox"/>
Grants access to Admin Supplier	<input checked="" type="checkbox"/>

Quick Links Notifications

At the bottom of the page, choose for the user to have access to Documents and News items, so that they can see the folders you will mark for limited access, and choose to Save. You may get some additional pages if you already have restricted content, that allow you to grant or deny access for these users to those restricted folders.

Can Manage Task Library  
Can Manage Task Type  
Can Manage Milestone Library  
Can Access Notifications  
27 Can Access Command Center  
Can View Command Center  
Can Add/Remove Public Reports in Report Card  
Can Add / Remove Public Cards  
28 Can Access Teams  
Can Access Teams  
# Can Create/Edit Teams  
# Can Delete Teams  
# Can Archive Teams

Grants privilege to Manage Task Library  
Grants privilege to Manage Task Type  
Grants privilege to Manage Milestone Library  
Grants privilege to Manage Notifications  
Grants access to Command Center  
Grants privilege to View Command Center  
Grants privilege to Add/Remove Public Reports in Report Card  
Grants privilege to Add / Remove Public Cards  
Grants access to Teams  
Grants privilege to Access Teams  
Grants privilege to Create/Edit Teams  
Grants privilege to Delete Teams  
Grants privilege to Archive Teams

The content in different sections for a user is controlled by the role(s) assigned. By default, users of this new role will not be able to see the content in the following sections. Click 'Yes' in case you want to change this behaviour.

Documents : ☒ Yes ☐ No  
News : ☒ Yes ☐ No

Submit Cancel

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## Assign Users to the Role

Next, you'll be asked if you want to reassign users from another role to this role. If you do this, users will be removed from their previous roles, and you want to add this role rather than replace the old role. If

you choose to assign users at this time, select “Assign this role userwise”. You’ll see the list of users and can check them off to be assigned this role in addition to any other roles they have.

If you don’t choose to assign users at this time, choose “Assign Later”. You can get back to this screen later by choosing the role from the Roles list and choosing “Change Users” from the Action Wheel.

Admin > Access Control > Roles > Add Role > Add Users for Role "testing1"

## ASSIGN ROLE

1 Profile → 2 Accessible Content → 3 Role Assignment

SELECT USERS TO ASSIGN ROLE "TESTING1"

Assign 'testing1' role to all users currently in : \*Develop

☐ Remove existing users from the selected role?

Assign

OR

Assign 'testing1' role userwise? :

When you’ve selected the users to add to this role, choose Assign User.

Admin > Access Control > Roles > Add Role > Add Users for Role "testing1"

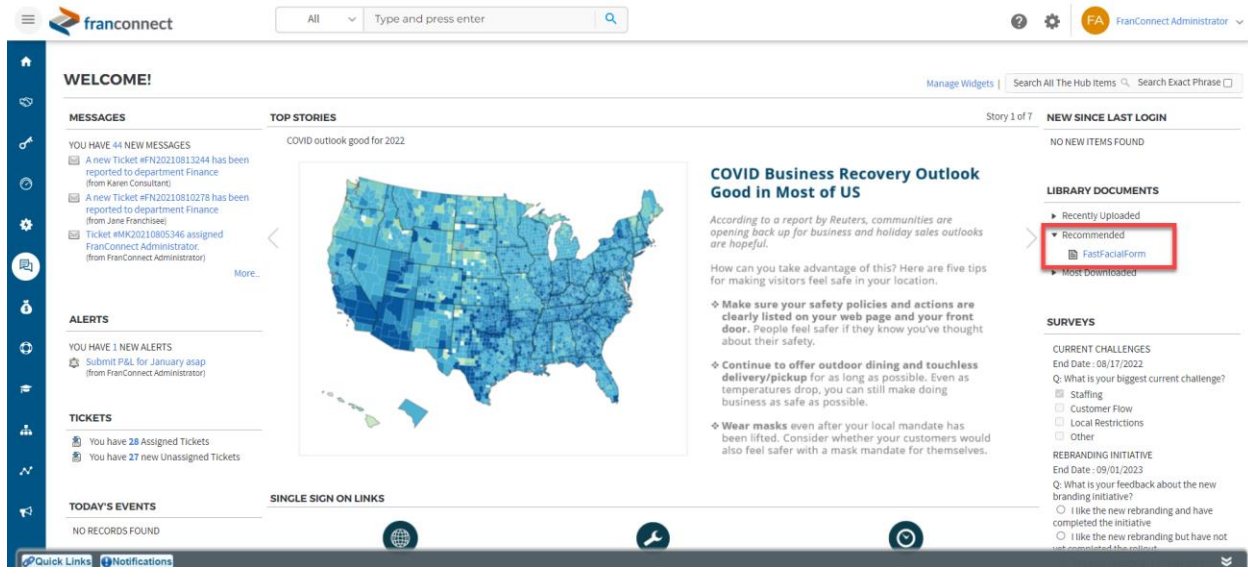
## DETAILS OF ALL CORPORATE USERS

Name	Phone	Email
<input checked="" type="checkbox"/> Alex Morgan	(231) 231-2313	qatest@staffex.com
<input type="checkbox"/> Alice Bronowski	20202020202	qatest@staffex.com
<input checked="" type="checkbox"/> Andrew Jackson	1111111111	qatest@staffex.com
<input checked="" type="checkbox"/> Andy Volk	(202) 492-5457	qatest@staffex.com
<input type="checkbox"/> Apple Demo	(981) 182-1812	qatest@staffex.com
<input type="checkbox"/> Bart V	(800) 555-1212	qatest@staffex.com
<input checked="" type="checkbox"/> CBO Executive	(123) 456-7890	qatest@staffex.com
<input type="checkbox"/> CCO Executive	(123) 456-7890	qatest@staffex.com
<input type="checkbox"/> Celine Heckel-Jones	(703) 390-9300	qatest@staffex.com
<input type="checkbox"/> CEO Executive	(703) 390-9300	qatest@staffex.com
<input type="checkbox"/> chris james	(730) 389-2972	qatest@staffex.com
<input type="checkbox"/> COO Executive	(703) 390-9300	qatest@staffex.com
<input type="checkbox"/> corporate finance	09811490776	qatest@staffex.com
<input type="checkbox"/> Director Ops	(987) 654-3210	qatest@staffex.com
<input type="checkbox"/> Director Marketing	(987) 654-3210	qatest@staffex.com
<input type="checkbox"/> Doug Smith	(989) 898-9898	qatest@staffex.com
<input type="checkbox"/> Executive CXO	(800) 280-9876	qatest@staffex.com
<input type="checkbox"/> Field Business Consultant EST	(800) 280-9801	qatest@staffex.com
<input type="checkbox"/> Franchise Development International	(755) 555-5555	qatest@staffex.com
<input type="checkbox"/> Franchise Admin	(123) 456-7890	qatest@staffex.com

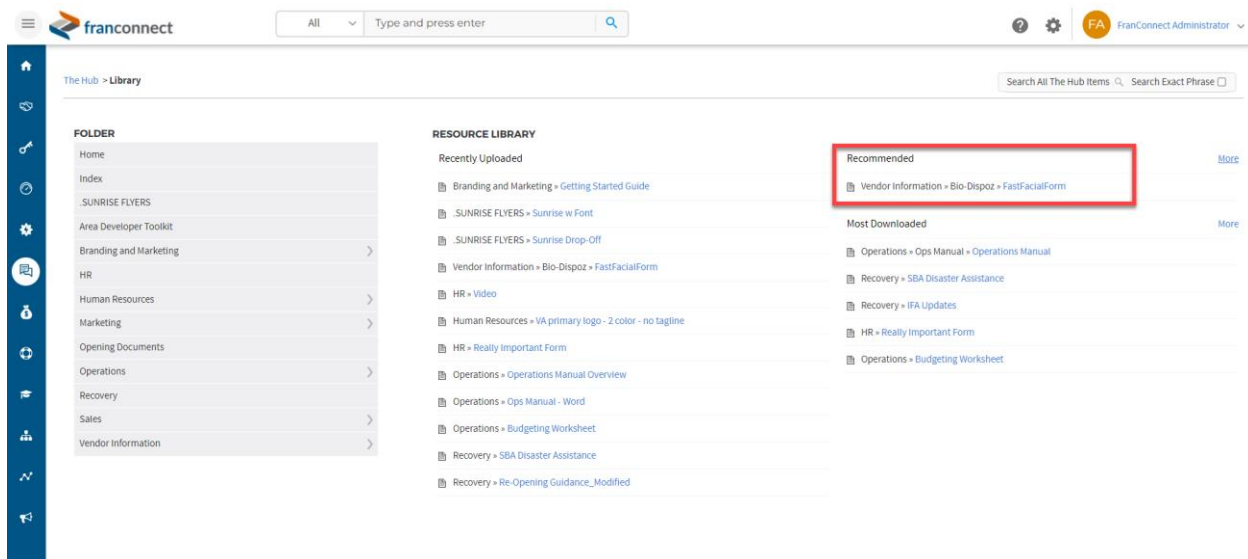
Assign Role

## Mark Documents as Recommended

In the Home Screen and the Index Screen of the Hub Library, recommended documents are highlighted for users. This gives you the opportunity to make frequently-requested documents or documents that you want to highlight more prominent in your Hub user experience.



The screenshot shows the FranConnect Home Screen. The top navigation bar includes the FranConnect logo, a search bar, and user information. The main content area is divided into several sections: **WELCOME!**, **MESSAGES** (listing 44 new messages), **TOP STORIES** (featuring a map of the US and a story titled "COVID Business Recovery Outlook Good in Most of US"), **NEW SINCE LAST LOGIN** (showing no new items), **LIBRARY DOCUMENTS** (with a red box highlighting the "Recommended" section under "Recently Uploaded"), **SURVEYS** (listing current challenges and a rebranding initiative), **ALERTS** (showing 1 new alert), **TICKETS** (showing 28 assigned and 27 new unassigned tickets), and **TODAY'S EVENTS** (showing no records found). A sidebar on the left contains navigation icons.



The screenshot shows the FranConnect Hub Library. The top navigation bar is identical to the Home Screen. The main content area is divided into three sections: **FOLDER** (listing various folders like Home, Index, Branding and Marketing, etc.), **RESOURCE LIBRARY** (listing various resources like Branding and Marketing, Sunrise Flyers, etc.), and **Recommended** (with a red box highlighting the "Recommended" section under "Recently Uploaded"). The "Recommended" section lists documents like "Vendor Information - Bio-Dispoz - FastFacialForm". A sidebar on the left contains navigation icons.

Making a document Recommended is a simple process. When you are adding or editing a document, there's a checkbox to put the document in the Recommended Documents section.

When you check this box, you will also have the option to make the recommendation expire. This is useful for time-sensitive documents, such as tax forms or holiday promotions, whose importance will decrease after a target date.

ADD LIBRARY DOCUMENT

FIELD MARKED WITH \* ARE MANDATORY

Max Size Limit

Do you want to add multiple documents?: ☐ Yes ☒ No

\*Library Document Title:

\*Brief Summary:

Enter search words to help you later find an article within the system

Document Type: ☒ Upload File ☐ Web Link ☐ HTML Page

Document Subtype: 

Select

\*Library Document File:

You can drag and drop file here to add  
or  

Select File

Do you want to upload Thumbnail Image: ☐ Yes ☒ No (On selecting No, system will autogenerate the thumbnail image.)

Recommended Documents: ☒

\*Recommended Document Expiration Date:

Accessibility: ☒ Public ☐ Protected

Add

Spell Check

Close



## Give Access to Documents with Direct Links

You can give users a direct link to documents in the Hub. This is useful if you want to include a link to information in a Top Story that appears on the Hub home page, or insert reference documents in a Training Course.

To do this, go to the document you want to share, and select “Copy URL” from the action wheel. You’ll see the direct URL of the document, and you can copy it and paste it into your story, course, or email.

The screenshot displays a document management interface. On the left is a sidebar with a list of categories: Branding and Marketing, HR, Human Resources, Marketing, Opening Documents, Operations, Recovery, Sales, and Vendor Information. The main area features a filter section with 'Document Type' (All), 'Document Subtype' (All), and 'Sort By' (Select) dropdowns, along with 'Search' and 'Save View' buttons. Below this is a document list table with columns for 'Document Title Summary' and 'Last Updated'. A document titled 'Getting Started Guide' is highlighted. An action wheel is open over this document, showing options: Download, Report, Modify, Delete, Copy URL (highlighted with a red box), Document Properties, Post Comment, and Version History.

Document Title Summary	Last Updated
Getting Started Guide	how to get started with FC 02/04/2022 1

You can also provide these links to non-FranConnect users. When you put a document into the Hub, you set accessibility to that document. If you select Public, the URL will download the document for anyone with the link. If you choose Protected, the user will be challenged for their FranConnect credentials before the download is permitted.

#### ADD LIBRARY DOCUMENT

FIELD MARKED WITH \* ARE MANDATORY.

Max Size Limit [?](#)

Do you want to add multiple documents? : ☐ Yes ☒ No

\*Library Document Title :

\*Brief Summary :

Enter search words to help you later find an article within the system

Document Type : ☒ Upload File ☐ Web Link ☐ HTML Page

Document Subtype :

\*Library Document File :

You can drag and drop file here to add  
or  
[Select File](#)

Do you want to upload Thumbnail Image : ☐ Yes ☒ No ( On selecting No, system will autogenerate the thumbnail image.)

Recommended Documents : ☐

Accessibility : ☒ Public ☐ Protected

Add

Spell Check

Close