

User Guide

Creating Users | Realms

STEP ONE | Creating User accounts from Employee Profile


In the persons profile, click the 'Make User Button'

Benjamin Stevenson (employee) 001 616 520

general competencies roles keys training messages site contact locations

report

Roles:	Employee	make user
Employer:	Illawarra Coal Holdings Pty Ltd	
First Name:	Benjamin	
Middle Name:		
Last Name:	Stevenson	
Card Id:	001 616 520	
PIN:	0000	
Phone 1: *		
Phone 2: *		
Email 1: *	fstevenson@pegasus.net.au	
Email 2: *		


No Card Photo
(no pending photo)
[upload](#)

Ensure the person email address is correct and click 'apply'

New User Email Address

Benjamin Stevenson has currently got the following email address.
This is now required for sending the user account password.

Please update this email address if required:

Email:

[cancel](#)

[apply](#)

Select the applicable rights and click Save

- Can Action Corrective Actions:
- Can View Corrective Actions:
- Can Process Pending Data:
- Can Endorse Pending Assessments:
- Can Process Pending SMS Reviews:
- Can Manage Training:
- Can Manage Merge Templates:
- Can Perform Id Checks:

Mobile App Rights

- Can Use Mobile App
- Can perform Cardholder Role Audits
- Can search by Cardholder Name, Company and DOB

Other Rights

- Can Make Online Bookings:
- Can Process Online User Requests:

cancel

save

Click the Sites tab

Benjamin Stevenson (realm user)

general

rights

sites

Select the site that the person will need access to, scroll down and click Edit

Can Process Escalated Actions:	<input type="checkbox"/>
Can Action Corrective Actions:	<input checked="" type="checkbox"/>
Can View Corrective Actions:	<input checked="" type="checkbox"/>
Can Process Pending Data:	<input checked="" type="checkbox"/>
Can Endorse Pending Assessments:	<input checked="" type="checkbox"/>
Can Process Pending SMS Reviews:	<input checked="" type="checkbox"/>
Can Manage Crews:	<input checked="" type="checkbox"/>
Can Manage Training:	<input checked="" type="checkbox"/>
Can Perform Id Checks:	<input checked="" type="checkbox"/>

Select the applicable rights and click Save. Selecting 'set full permissions' will tick all the rights - **Illawarra Coal - Appin Mine Permissions** [\(set full permissions\)](#)

Can Action Corrective Actions:	<input checked="" type="checkbox"/>
Can View Corrective Actions:	<input checked="" type="checkbox"/>
Can Process Pending Data:	<input checked="" type="checkbox"/>
Can Process Pending SMS Reviews:	<input checked="" type="checkbox"/>
Can Endorse Pending Assessments:	<input checked="" type="checkbox"/>
Can Manage Crews:	<input checked="" type="checkbox"/>
Can Manage Training:	<input checked="" type="checkbox"/>
Can Perform Id Checks:	<input type="checkbox"/>

Repeat steps for additional sites user will need access to.

By selecting Make Same As will mimic the permissions of a user that is already setup at the realm

Make Same As

Reproduce the settings of:

STEP TWO | Creating User accounts for contractors

Click the person tab and select users



Click add

Realm Users

Cal Basis: Concurrent Login, Cals: 15

search

Include Inactive

add

Ready to search

▶ Leave search box blank to match all user names, or enter a text fragment to find matching names.

Click add as new

Create Users From Existing Employees

- ▶ Use the add as new button to add a user who is not an employee.
- ▶ To add users who are employees, select their names from the list below, check & update their email addresses, then use the proceed button below the list.

add as new

Complete the mandatory fields and tick the boxes for the applicable user rights.
Scroll to the bottom and click Save

Add Realm User

add

First name: *

Middle name:

Last name: *

Job title:

Phone 1: *

Phone 2: *

Email 1: *

Email 2:

Address: *

Town: *

State: *

Post code: *

Country: * ▼

Can Use Onsite: *if tick*

User Rights

Realm Access Level: ▼

Can View Foreign Data From: ▼ *Applies to :*

Can Represent Concos in Own Portals:

Can Represent Employers in All Portals: ▼

Can View SMS Review Results:

Can Manage User Accounts:

Click the Sites tab

Benjamin Stevenson (realm user)

general rights **sites**

Select the site that the person will need access to, scroll down and click Edit

Can Process Escalated Actions:	<input type="checkbox"/>
Can Action Corrective Actions:	<input checked="" type="checkbox"/>
Can View Corrective Actions:	<input checked="" type="checkbox"/>
Can Process Pending Data:	<input checked="" type="checkbox"/>
Can Endorse Pending Assessments:	<input checked="" type="checkbox"/>
Can Process Pending SMS Reviews:	<input checked="" type="checkbox"/>
Can Manage Crews:	<input checked="" type="checkbox"/>
Can Manage Training:	<input checked="" type="checkbox"/>
Can Perform Id Checks:	<input checked="" type="checkbox"/>

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Can Manage Crews:	<input checked="" type="checkbox"/>
Can Manage Training:	<input checked="" type="checkbox"/>
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