

User Guide

Creating Users | Sites

STEP ONE | Creating User accounts from Employee Profile


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

Eliza Stevenson (employee) 001 616 504

general competencies roles keys training messages site contact locations

report

Roles:	Employee	make user	make contractor
Employer:	Illawarra Coal Holdings Pty Ltd		
First Name:	Eliza		
Middle Name:			
Last Name:	Stevenson		
Card Id:	001 616 504		
First Site Login:	none		
PIN:	0000		
Phone 1: *			
Phone 2: *			



Card Photo
[Show Pending Photo](#)

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

New User Email Address

Eliza 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](#)


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[cancel](#)


[apply](#)

Select the rights tab and scroll down to click edit.

[Can search by Cardholder Name, Company and DOB](#)

Other Rights

- [Can Make Online Bookings](#) *Must have 'can manage training'*
- [Can Process Online User Requests](#) *Must be an active user.*

[edit](#) 

Select the tick boxes of the rights the person should have and click 'save'

Overall Data Access

- Site Web
- Employee Personal Web

General Data Rights

General rights control the user's data access on a location-by-location basis. U tab to manage these general data rights. All specific data rights, as listed below

Specific Data Rights

- Can View Foreign Data From:
- Can Represent Employers in All Portals:
- Can View **SMS Review Results**
 - Can Manage **User Accounts**
 - Can Access **Financial Reports**
 - Can Block **Cardholders**
 - Can Log **Persons In And Out**
 - Can Create **Messages**
 - Can Edit **All Messages** *if ticke*
 - Can Create **Certs**
 - Can Assign **Certs**
 - Can Authorise **Assigned Certs** *if ticke*
 - Can Edit **Cert Keys**
 - Can Assign **Cert Keys**
 - Can Create **Roles:** *Enabl*
 - Can Assign **Roles:** *Enabl*
 - Can Create **Competencies**
 - Can Assign **Competencies**
 - Can Create **Access Keys** *if ticke*
 - Can Assinn **Access Keys**

*N.B If you change a persons rights while they are logged in, they will need to logout and then back in again for these changes to take effect.

STEP TWO | Creating User accounts for contractors

Click the person tab and select users



Click add

Site 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 A New User

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 ticked, also enable:*

User Rights

This user is a : for

Can View Foreign Data From:

Can Represent in All Portals:

- Can View SMS Review Results
- Can Manage User Accounts
- Can Access Financial Reports
- Can Block Cardholders
- Can Log Persons In And Out
- Can Create Messages
- Can Edit All Messages

if ticked, also enable: