

# User Guide

## Creating Users | Realms

### STEP ONE | Creating User accounts from Employee Profile

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

Lillian Stevenson (employee) 001 641 724

general competencies groups roles keys training messages site contact

locations report

Roles: Employee  
Employer: Onsite Track Easy Pty Limited  
First Name: Lillian

[make user](#)



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

### New User Requires Email Address

Lillian Stevenson does not currently have an email address specified.  
An email address is now required for sending the user account password.

Please specify a valid email address:

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

Lillian Stevenson (realm user)

general    rights    **sites**

**Sites**

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

Can Can Incomplete Reviews:	<input type="checkbox"/>
Can Process Escalated Actions:	<input checked="" 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

Can Action Corrective Actions:	<input 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 Can Incomplete Reviews:	<input type="checkbox"/>
Can Process Escalated Actions:	<input checked="" 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

Can Action Corrective Actions:	<input 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: