User Guide

Creating Users | Realms

STEP ONE | Creating User accounts from Employee Profile

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

Ensure the person email address is correct and click '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)

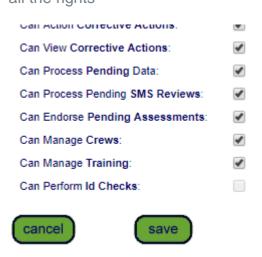| general	rights	sites

Sites

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

Select the applicable rights and click Save. Selecting 'set full permissions' will tick all the rights

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

STEP TWO | Creating User accounts for contractors

Click the person tab and select users

Click add

Click 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: * [Australia ▼]
Can Use Onsite: ☑   if tick

User Rights

Realm Access Level: [Data Viewer ▼]
Can View **Foreign Data** From: [No Employers ▼]   Applies to
Can **Represent Concos** in **Own Portals**:   ☐
Can **Represent Employers** in **All Portals**:   [No Employers ▼]
Can View **SMS Review Results**:   ☐
Can Manage **User Accounts**:   ☐

Click the Sites tab

Benjamin Stevenson   (realm user)

general	rights	sites

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Powered by Onsite

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

Can Process Escalated Actions: ✗
Can Action Corrective Actions: ✗
Can View Corrective Actions: ✗
Can Process Pending Data: ✗
Can Endorse Pending Assessments: ✗
Can Process Pending SMS Reviews: ✗
Can Manage Crews: ✗
Can Manage Training: ✗
Can Perform Id Checks: ✗

sites   **edit**

Select the applicable rights and click Save. Selecting 'set full permissions' will tick all the rights

Can Action Corrective Actions: ☑
Can View Corrective Actions: ☑
Can Process Pending Data: ☑
Can Process Pending SMS Reviews: ☑
Can Endorse Pending Assessments: ☑
Can Manage Crews: ☑
Can Manage Training: ☑
Can Perform Id Checks: ☐

cancel   **save**

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: - - select a realm user - - ▼