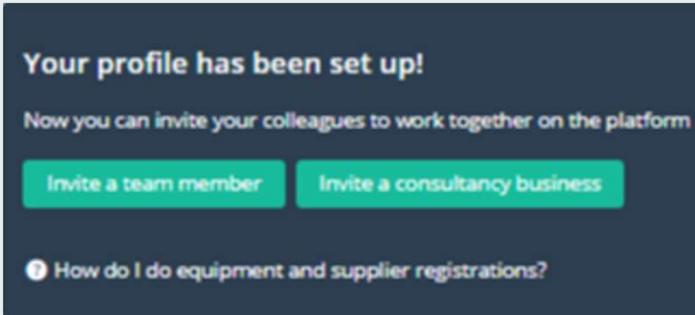


# A Quick Reference Guide

## Managing users in the platform

### 1 Inviting colleagues



If you have more than one member of your team, invite them to register in the platform so they are connected to your business

#### To begin

- Click on the **Invite a team member** button, or
- Click on the **Invite a consultancy business** button

**AB Invite a team member**

As a business administrator, you can invite an employee of your company and allocate a role permission to them. Select the relevant permission, search for the person in the system using their email address and hit 'Send invitation'. An invitation will be sent to the person you want to join the team.

What permission would you like them to have? [?](#)

User

Business administrator

Email address

You have to enter a full email address.

#### To invite a team member

- Note the instructions and tool tips
- Select the permission you wish to allocate to the role
- Enter the individual's email address
- Click on the **Send invitation** button
- The individual will receive an email to accept and register in the platform.

**AB Invite Business Consultancy**  
Enter Information •

As a business administrator, you can add a consultancy business to work on your behalf for electrical equipment certifications. Begin typing the name of the consultancy business and choose from the results, select the relevant permission and hit 'Send invitation'. An invitation will be sent to the consultancy business you want to join the team.

Business Consultancies

Select Permission [?](#)

Full

Limited

#### To invite a consultancy business

- Note the instructions and tool tips
- Enter the consultancy business email address. The business will need to register first
- Select the appropriate permission
- Click on the **Send invitation** button
- The business will receive an email to accept or reject the invitation

#### Tip

- See next page for information on Roles and Permissions

## Please note:

The first person in the team to register will automatically be set up as the Business Administrator in the platform

This can be changed later and there can be more than one Business Administrator



*As an **Applicant Business Administrator** I am..*

Responsible for:

- Entering and editing the company profile
- Inviting and off-boarding (we call it de-linking) users and managing role permissions
- Inviting consultancy businesses to make applications on my organisation's behalf – granting Full or Limited permission
- Making and managing new certification applications, renewals, modifications, and transfers



*As an **Applicant team member**, I am a **User** that can ...*

Manage new applications, renewals, modifications, and transfers

**FULL** - initiate and manage new certification applications, renewals, modifications, and transfers on behalf of applicant company

**LIMITED** - can only work on those new certification applications, renewals, modifications, and transfers allocated to them by the applicant company



*As a **Consultancy Business Administrator** I am ..*

Responsible for:

- Entering and editing the consultancy business company profile
- Inviting and de-linking users and managing role permissions for my consultancy business team
- **Accepting invites from applicant businesses so we can make applications on their behalf**
- Making and managing new certification applications, renewals, modifications, and transfers **on behalf of the applicant** as either a FULL or LIMITED consultancy as chosen by the applicant



*As a **Consultancy team member**, I am a **User** that can ...*

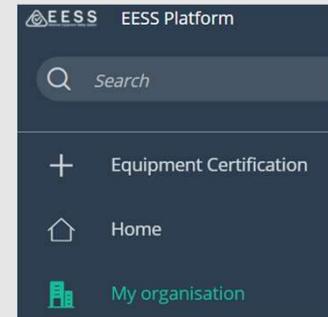
Make and manage new certification applications, renewals, modifications, and transfers **on behalf of the applicant** as a member of the FULL or LIMITED consultancy business as chosen by the applicant

## 2 Changing permissions

As an Applicant Business Administrator, you can change permissions for users and consultants

### To begin

- Select  **My organisation** via Navigation
- In the row of the person whose permission you wish to change, click on the 3 vertical dots
- Select **Edit Permission** from the pop-up option



Team member	Role	Permission
Kay Cee	Applicant	Business administrator
cad kay	Applicant	User

[Edit Permission](#)

### Change permission

- Select the permission level required
- Click the **Submit** button

**Edit permission** ✕

**Team Member**  
cad kay

**Role**  
Applicant

**Permission\***

User
  Business administrator

Note: As a Consultant Business Administrator, you can change permissions for your users within your organisation in the same way (i.e. User to Business Administrator or vice versa only)

## 3 Delinking users

Business Administrators can also remove users and consultants from association with your business by delinking them

### Remove access

- In the row of the person you wish to remove, click on the 3 vertical dots
- Select **Delink from organisation** from the pop-up option
- To confirm this action click the **Yes, delink** button

cad kay	Applicant	User	⋮
<b>Organisation</b>		<b>Permission</b>	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">           Edit Permission            Delink from organization         </div>