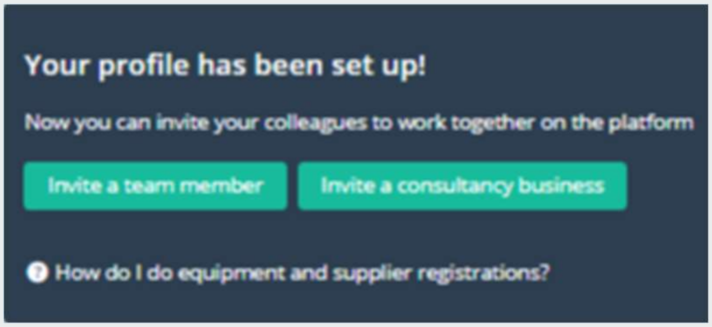
A Quick Reference Guide

Managing users in the platform

EESS
Electrical Equipment Safety System

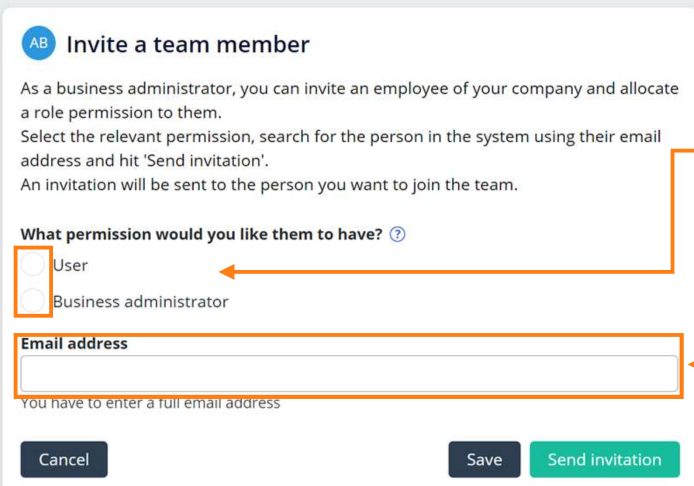
❶ Inviting colleagues



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

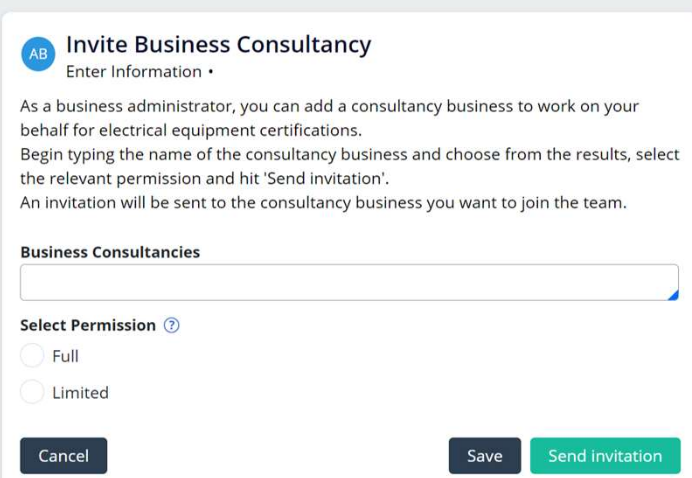
To begin

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



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.



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

Roles and permissions in the platform

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

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

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

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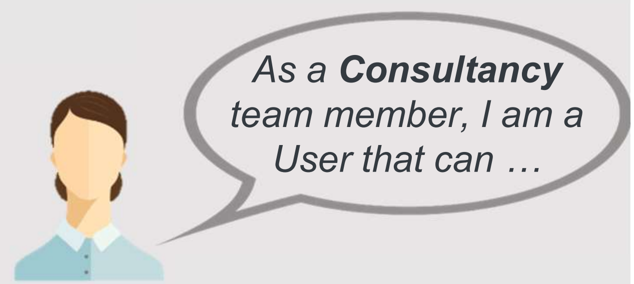
Responsible for:

- 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



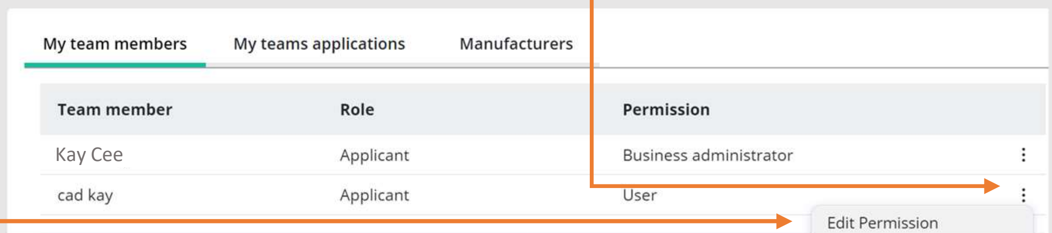
Make and manage new certification applications, renewals, modifications, and transfers **on behalf of the applicant** as a member of the FULL or LIMITED consultancy business as chosen by the applicant

❷ Changing permissions

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

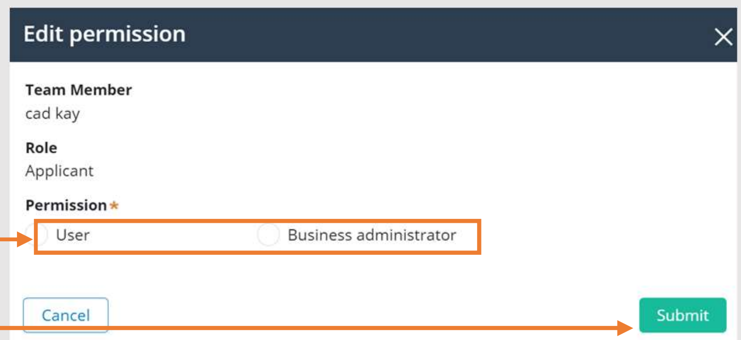
To begin

- 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



Change permission

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



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)

❸ 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