

# Inviting a User

To invite a user the organisation admin should:

1. Login to the system with their new credentials ( username/ email and password).
2. Navigate to **“Manage” > “Users”**
3. Click **“Invite User by email”** and fill in the user’s :
  - **Email**
  - **Firstname**
  - **Lastname**
  - **Role** – this is key for limiting the user’s access to certain areas of the portal. For more information on this see **“System Management -> Roles and Permissions”**.
  - **Notification settings** – a user can receive notifications by email or SMS from the system as long as an email address is provided and or a phone number is given. As long as the relevant options are checked the user can receive notifications for:
    - Completed Assessments
    - Schedule Alerts
    - Schedule reminders
    - Non-Conformance reminders

These are all provided in the **“Invite User By Email Form”** example shown.

## PLEASE NOTE

**Roles** are described under **“System Management - Roles and Permissions”** of this guide.

## Invite User by Email Form



1. Click **“Invite”** once the user information has been added.
2. The recipient should now receive an invite to the system via the **email address**

entered.

3. The new user should **click the verification link** in their received email and continue to the **portal page** where they can fill in the rest of their details, including a **password** for their new account.