

Adding Users

9 Steps

Created by

Plant Assessor

Creation Date

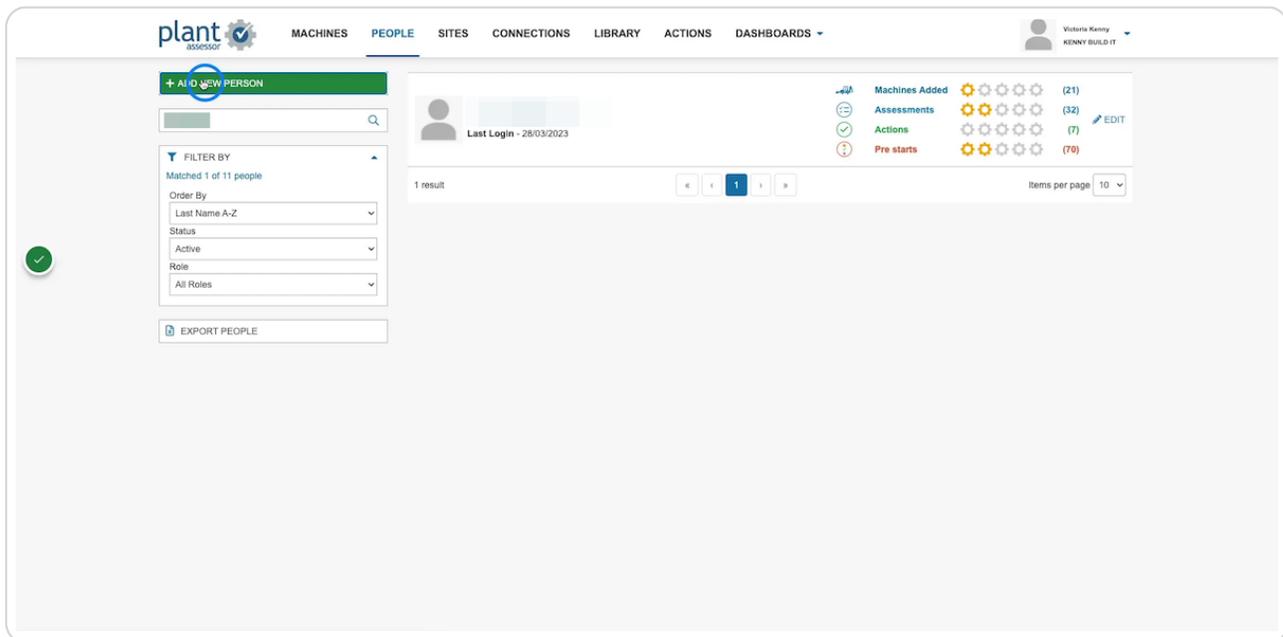
April 5, 2023

Last Updated

April 5, 2023

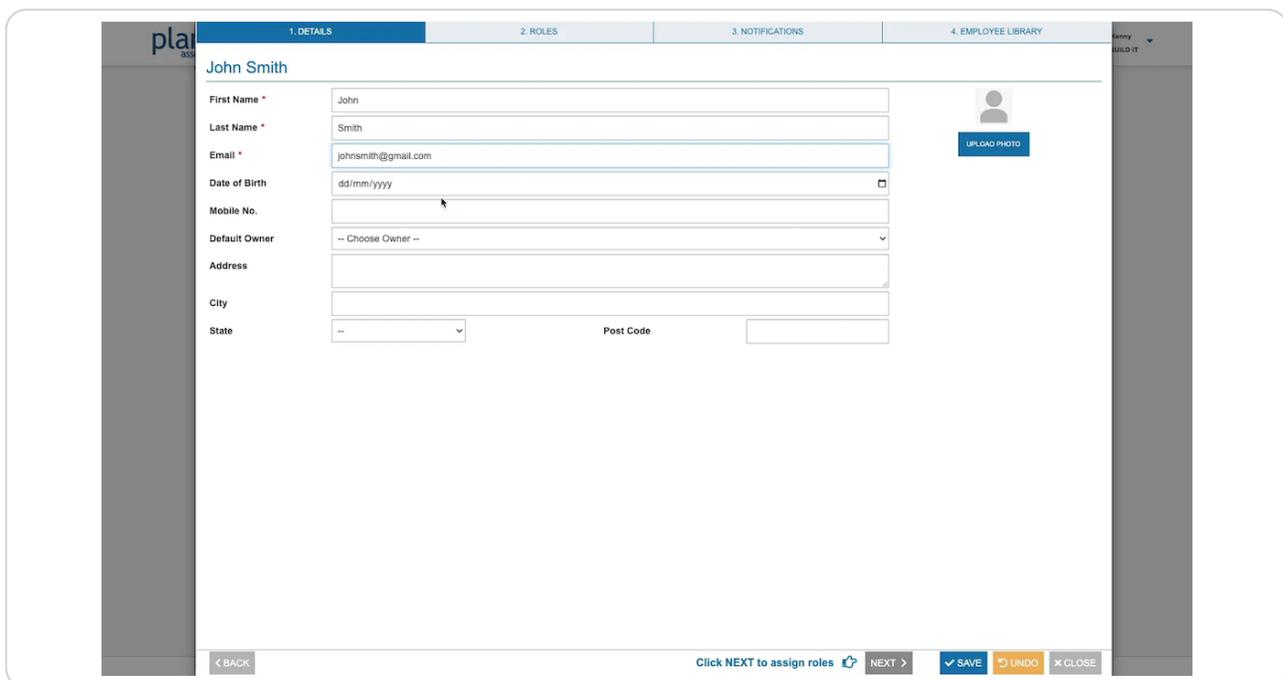
STEP 1

Click Add new person



STEP 2

Enter the user's details



STEP 3

If you have Owners (Departments) setup and would like to assign this user as a Default Owner, select from the drop down here.

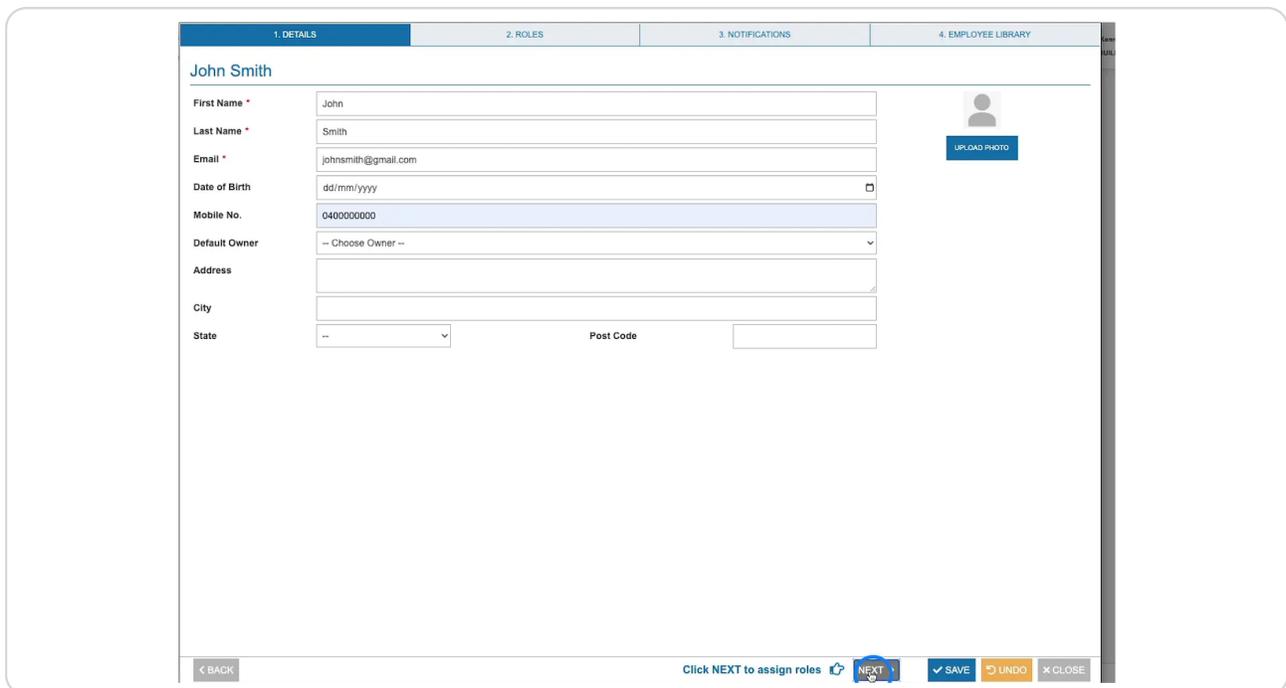
To learn more about [setting up owners click here](#).



A screenshot of a user profile form. The form includes fields for Mobile No. (040000000), Default Owner (a dropdown menu with options: -- Choose Owner --, Department 1, Depot, Kenny Build It), Address, City, State (a dropdown menu with --), and Post Code. A blue circle highlights the Default Owner dropdown menu.

STEP 4

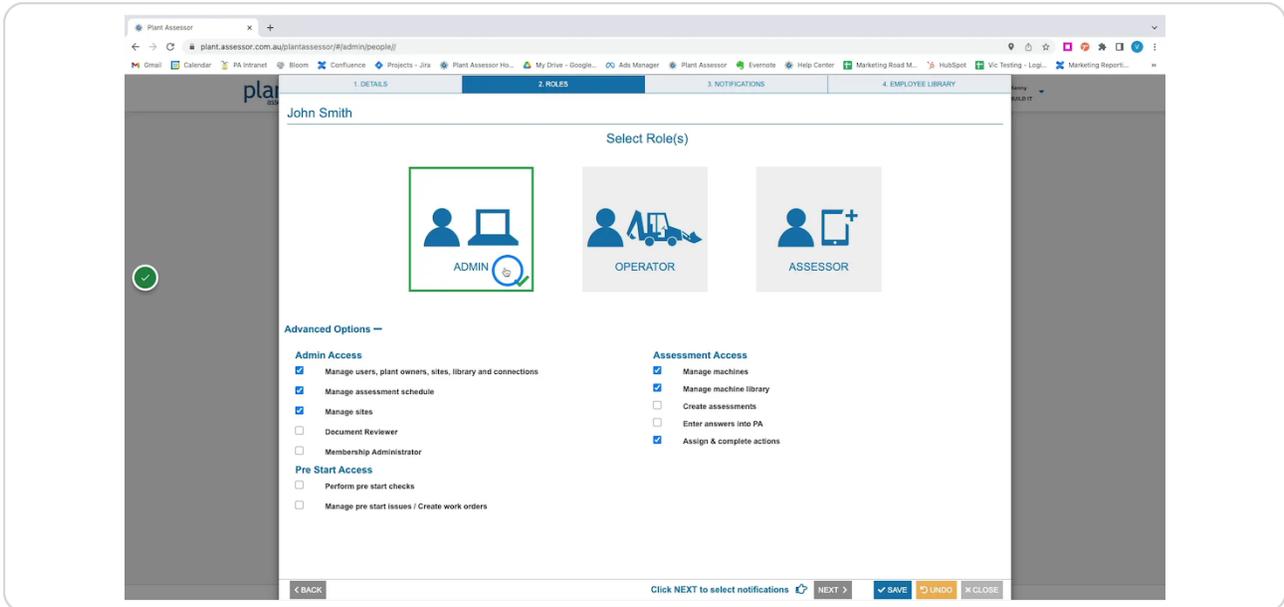
Click Next



A screenshot of the user profile form for John Smith. The form includes fields for First Name (John), Last Name (Smith), Email (johnsmith@gmail.com), Date of Birth (dd/mm/yyyy), Mobile No. (040000000), Default Owner (a dropdown menu with -- Choose Owner --), Address, City, State (a dropdown menu with --), and Post Code. The form is titled "John Smith" and has a "1. DETAILS" tab selected. At the bottom, there are buttons for "< BACK", "Click NEXT to assign roles", "NEXT", "SAVE", "UNDO", and "X CLOSE".

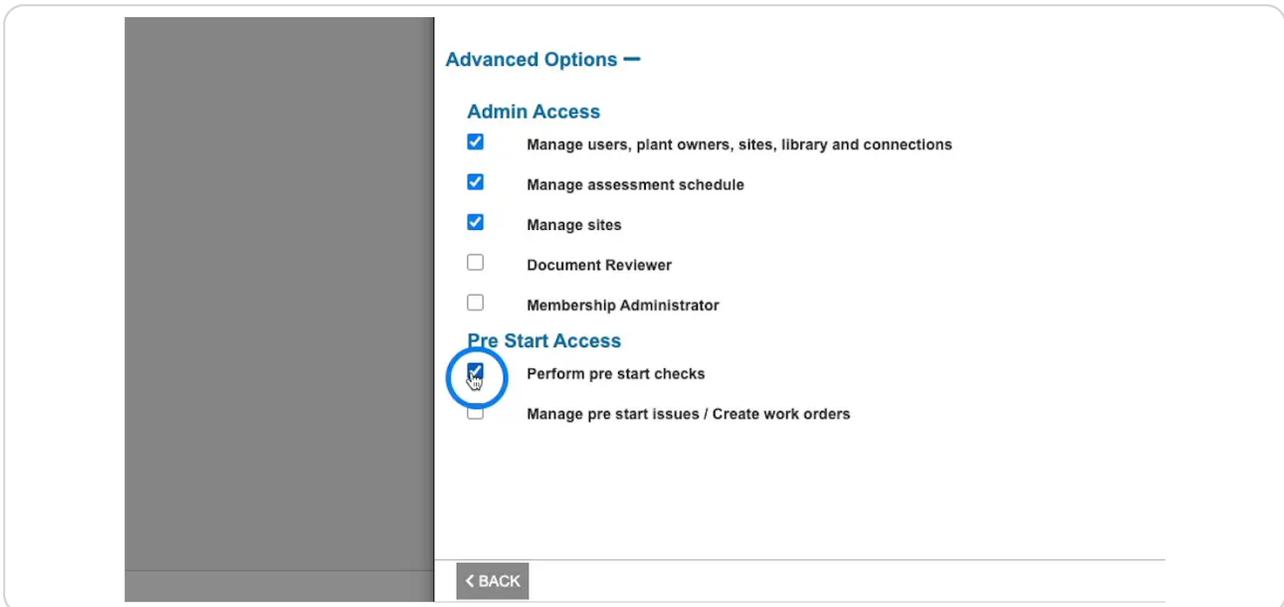
STEP 5

On the Roles tab, you can assign a role to the user which determines their permissions within Plant Assessor. You can choose between Admin, Operator and Assessor.



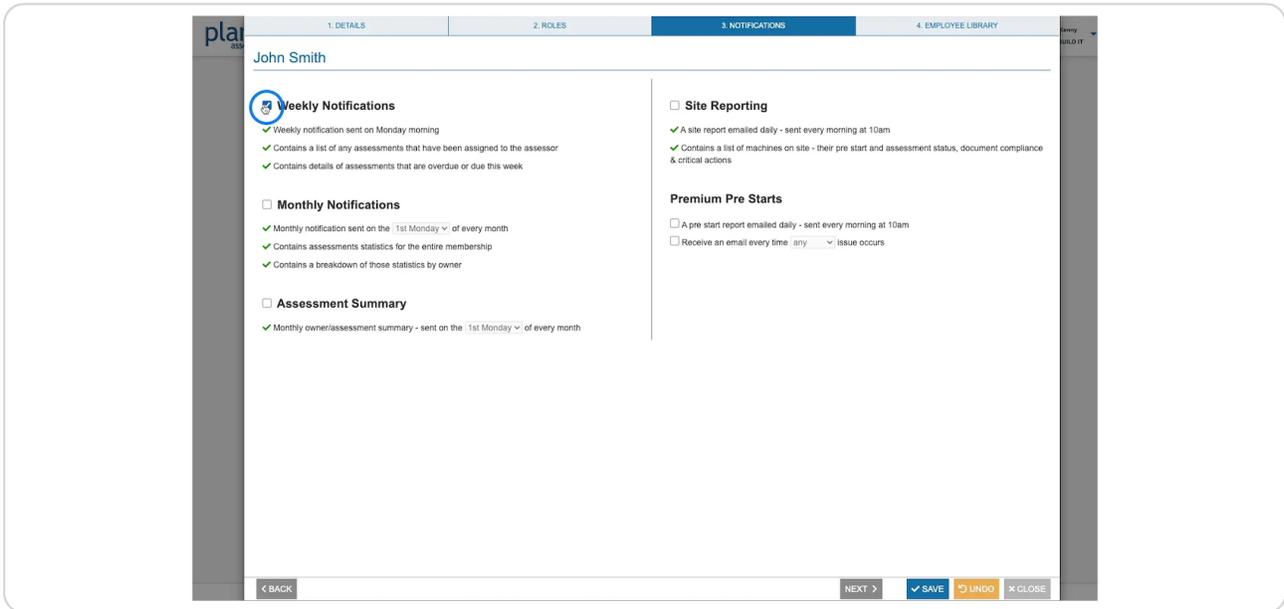
STEP 6

Each role has its own default permissions. However you can modify the permissions by ticking the applicable check boxes.



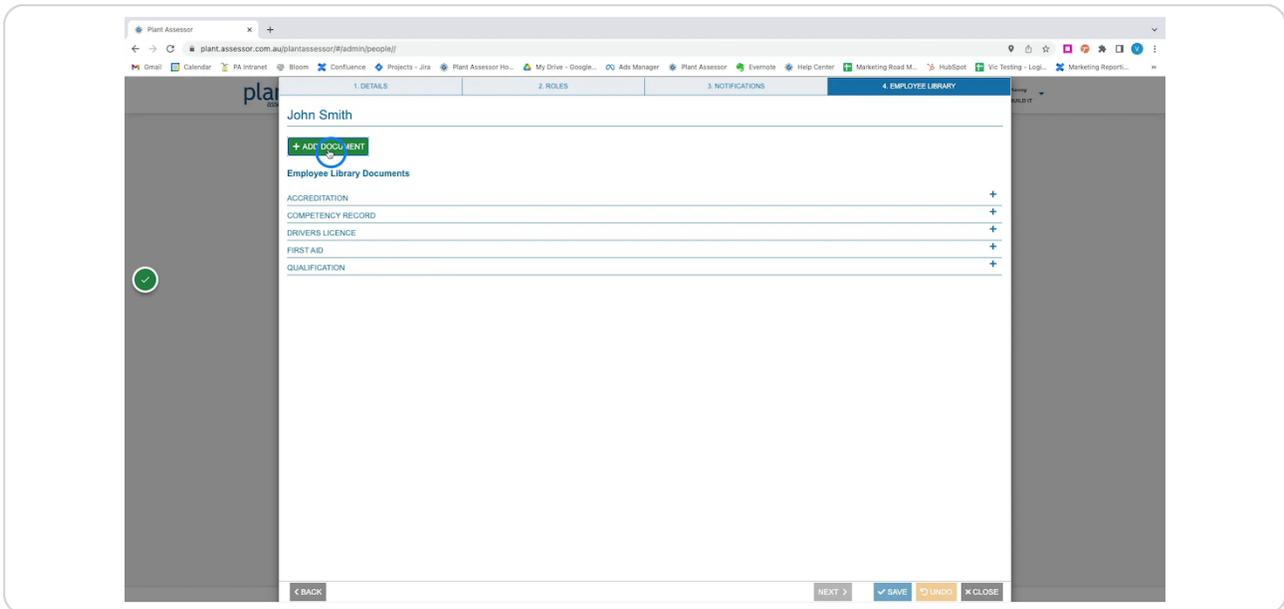
STEP 7

On the notifications tab, you can select which Notifications and Reports the user will receive.



STEP 8

On the employee library tab, you can add documents that are specific to the user. Select the document type and then record any relevant information or expiry dates in the additional details section



STEP 9

Once saved, the user has been added to your account. They will receive an email with instructions on how to create their password.

The screenshot displays the 'PEOPLE' management page in the plant assessor application. The top navigation bar includes 'MACHINES', 'PEOPLE', 'SITES', 'CONNECTIONS', 'LIBRARY', 'ACTIONS', and 'DASHBOARDS'. The user profile 'Vic Kenny KENNY BUILD IT' is visible in the top right. On the left, there is a '+ ADD NEW PERSON' button, a 'Keyword Search' field, and a 'FILTER BY' section with options for 'Order By' (Last Name A-Z), 'Status' (Active), and 'Role' (All Roles). Below the filters is an 'EXPORT PEOPLE' button. The main content area shows a list of three users. Each user entry includes a profile picture, name, email, last login date, and a set of statistics: Machines Added, Assessments, Actions, and Pre starts, each represented by a gear icon and a count. An 'EDIT' button is present for each user. The bottom of the page shows '3 results' and a pagination control with '1' selected, and 'Items per page' set to '10'.

| Name | Email | Last Login | Machines Added | Assessments | Actions | Pre starts |
|------------|---------------------|------------|----------------|-------------|---------|------------|
| [Redacted] | [Redacted] | 05/04/2023 | 13 | 11 | 1 | 10 |
| [Redacted] | [Redacted] | 28/03/2023 | 21 | 32 | 7 | 70 |
| John Smith | johnsmith@gmail.com | | 0 | 0 | 0 | 0 |

