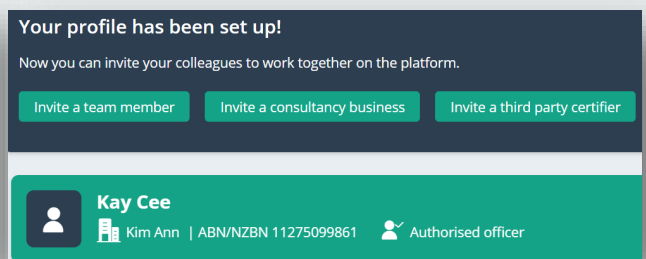
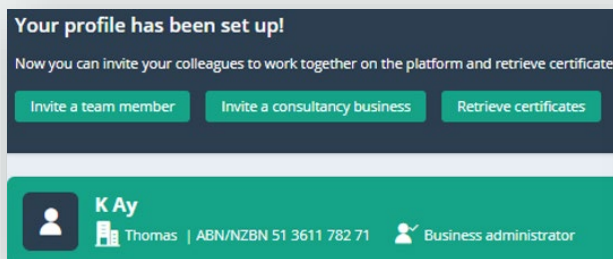


1 Inviting colleagues

Once you have set your business up as a Certificate Applicant, Responsible Supplier or Consultant, if you have more than one member of your team, invite them to register in the platform so they are connected to your business

For more information on roles and permissions in the EESS Platform see Understanding Roles and Permissions in the [Learning guides](#)

Your screen and button options will be different depending on the intended use of the platform selected when you set up your account

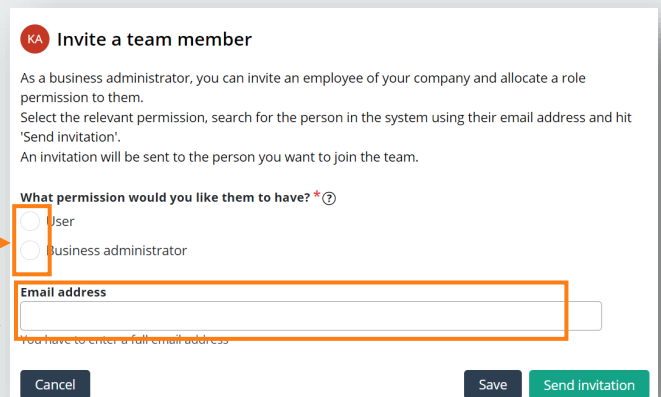


To begin

- Click on the **Invite a team member** button, or
- Click on the **Invite a consultancy business** button to invite external consultants. A Responsible Supplier can also invite a Third-Party Certifier who has issued a certificate to you to also act on your behalf to register the equipment on that certificate to your responsible supplier registration (to use this option you need to set up an agreement with the certifier beforehand – if they offer that service.

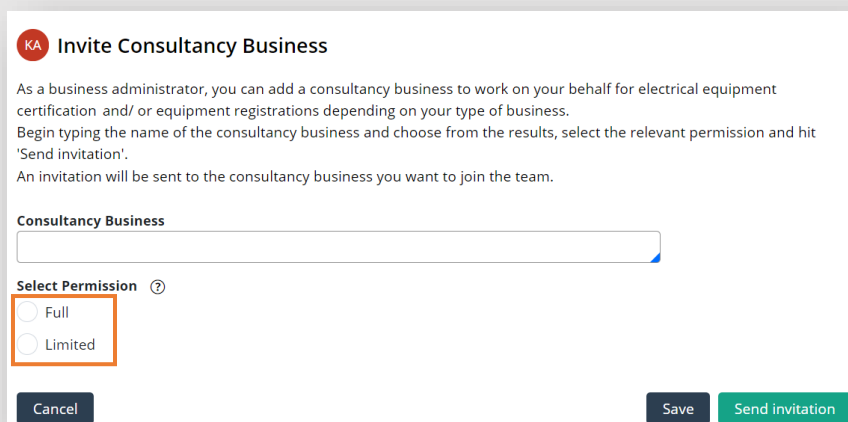
To invite a team member

- 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 on the EESS platform first
- Select the appropriate permission - **Full / Limited access** (see below)
- Click on the **Send invitation** button
- The business will receive an email to accept or reject the invitation



KA Invite Consultancy Business

As a business administrator, you can add a consultancy business to work on your behalf for electrical equipment certification and/ or equipment registrations depending on your type of business. 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.

Consultancy Business

Select Permission ?

Full

Limited

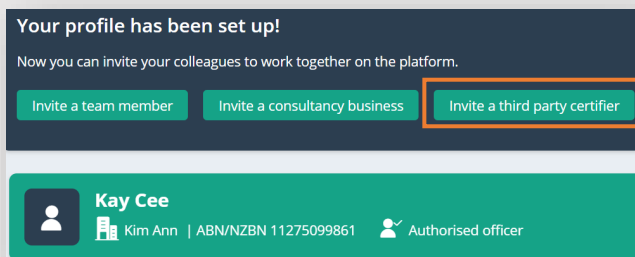
Cancel Save Send invitation

EXTERNAL USER / CONSULTANT ACCESS:

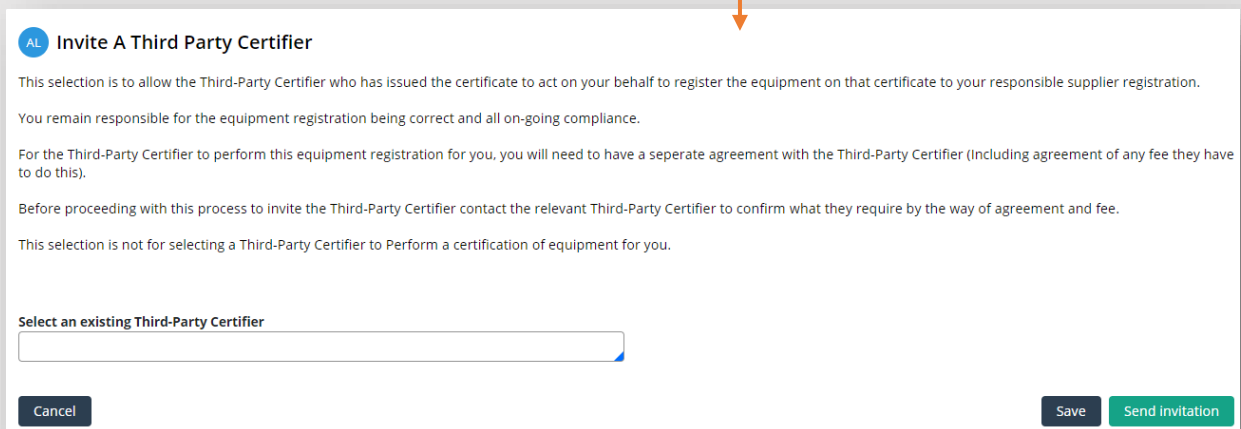
FULL - initiate and manage new certification applications or equipment registrations, renewals and modifications, on behalf of the applicant and / or responsible supplier company. Note: this access enables consultants to transfer certificates

LIMITED - can only work on those certification applications, or equipment registrations, renewals and modifications, allocated to them by the applicant and / or responsible supplier company on a case-by-case basis

Inviting a Third-Party Certifier to act on your behalf to register the equipment



Read the information in the screen carefully



AL Invite A Third Party Certifier

This selection is to allow the Third-Party Certifier who has issued the certificate to act on your behalf to register the equipment on that certificate to your responsible supplier registration. You remain responsible for the equipment registration being correct and all on-going compliance.

For the Third-Party Certifier to perform this equipment registration for you, you will need to have a separate agreement with the Third-Party Certifier (including agreement of any fee they have to do this).

Before proceeding with this process to invite the Third-Party Certifier contact the relevant Third-Party Certifier to confirm what they require by the way of agreement and fee.

This selection is not for selecting a Third-Party Certifier to Perform a certification of equipment for you.

Select an existing Third-Party Certifier

[Cancel](#) [Save](#) [Send Invitation](#)

- Start typing the name of the Third-Party Certifier company for it to appear
- Click on the name
- Click on **Send invitation**

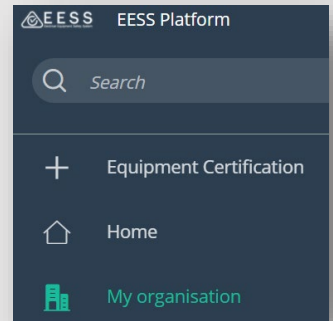
The Third-Party Certifier will be emailed to connect to your organization.

2 Changing permissions

As a Certificate 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	⋮
Organisation	Permission		Edit Permission Delink from organization