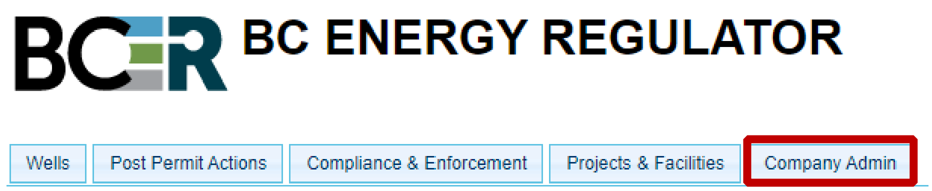
Company Administrator Guide

This guide provides step-by-step instructions for users acting as Company Administrators in KERMIT. Further guidance can be found in the Online Systems Accounts page on www.bc-er.ca regarding Online Systems accounts, usernames, passwords, security roles and company administration.

As a Company Administrator you have access to do the following in KERMIT:

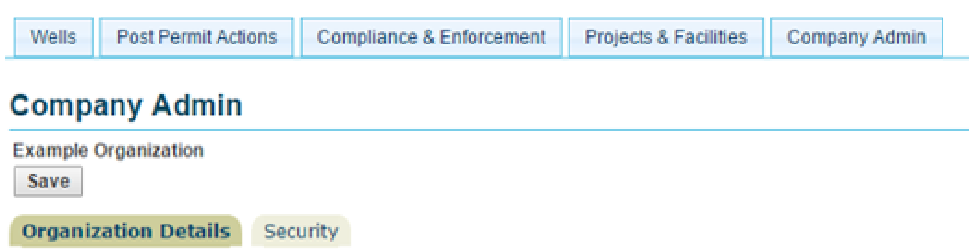
- view the details of your organization,
- add or remove a user from your organization,
- manage the organization a user's account is associated with,
- manage security roles for a user, and
- update the details of a user's account.

To get started, select the Company Admin tab:



If you do not have access to this tab you do not have the Company Admin security role on behalf of any organizations. This security role must be obtained to gain this access.

Once you've selected the Company Admin tab it will display the name of organization you have the Company Admin security role on behalf of. You'll also now have access to the Organization Details and Security tabs:



Organization Details tab

This tab allows Company Administrators to view the details of their organization:

All organization details are read only in KERMIT. Any updates required must be applied for through Petrinex and cannot be made in KERMIT.

Security tab

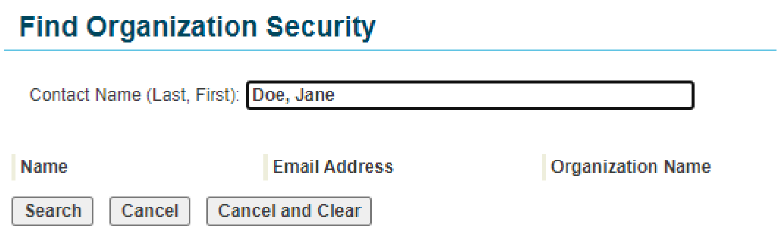
The Security tab allows Company Administrators to:

- add or remove a user from your organization,
- manage the organization a user's account is associated with,
- manage security roles for a user, and
- update the details of a user's account.

For guidance on completing each of these activities please refer to the subsequent sections below.

Add a user to your organization

1. Select Add Security.
2. In the Find Organization Security window that pops up, enter the user's name as directed (Last Name, First Name) then select Search:

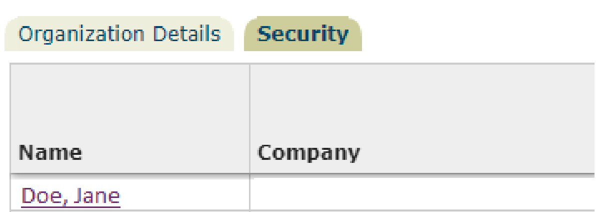


***Please note: If no results are returned, then the user does not have an account. Please direct the user to [this page](#) for assistance with creating an account.**

3. Select the name of the user from the search results:

This will close the Find Organization Security pop up window and take you back to the Security tab.

4. Select Save.
5. View the user you just added on the Security tab:



Manage the organization a user's account is associated with

1. Select the user's name from the Security tab:

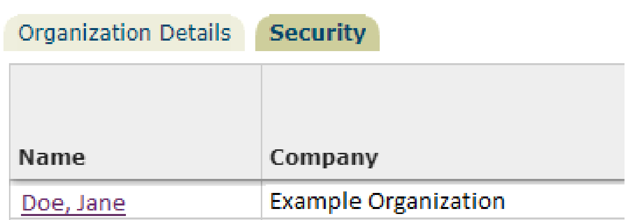
2. In the Edit Security Contact window that pops up, select your organization from the Company drop down:

   Please note that you will be unable to associate a user to your organization if they are currently associated to another organization.

3. Select Save. This will close the Edit Security Contact pop up window and take you back to the Security tab.
4. View the organization the user is now associated with on the Security tab:

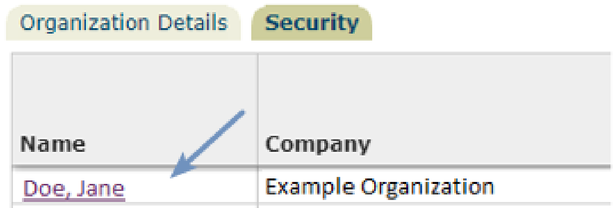
Manage security roles for a user

1. Ensure the user shows on the Security tab and the Company they are associated with is set to your organization.

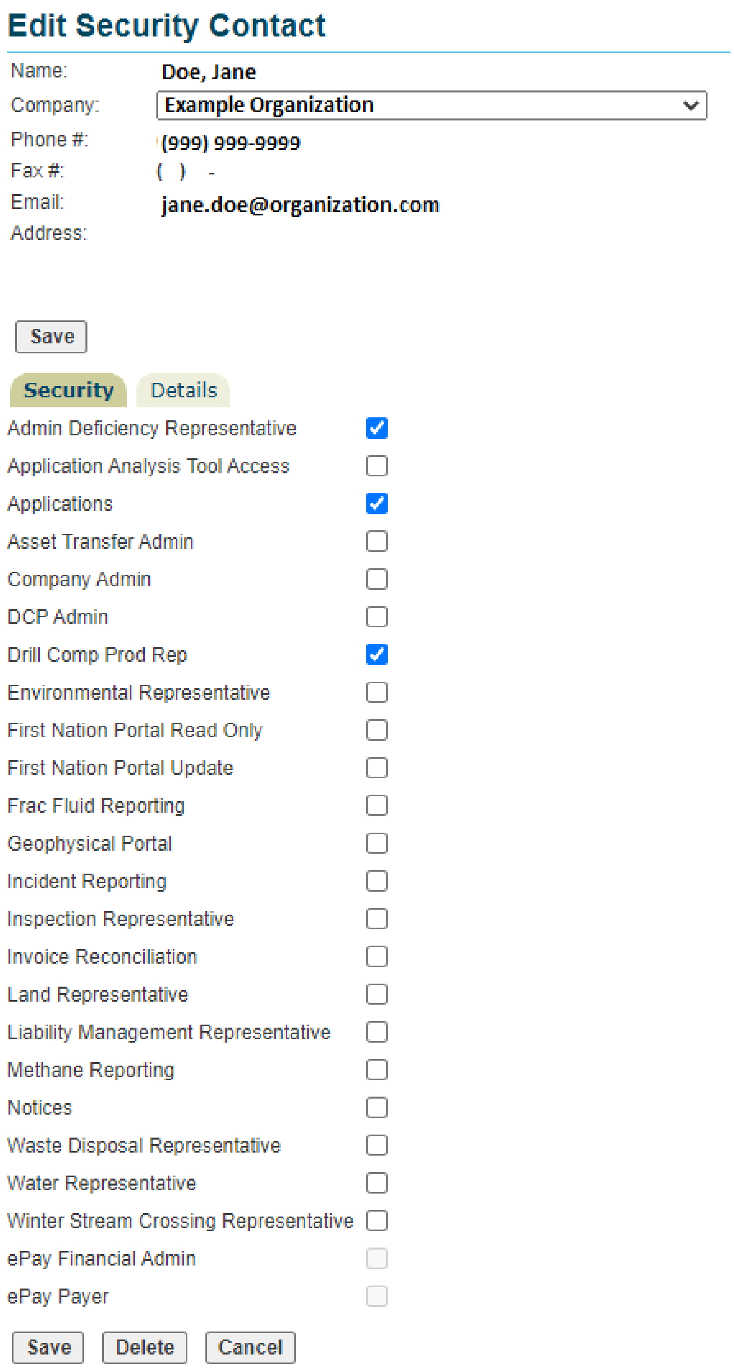


   If a user is not yet associated to your organization see the *Manage the organization a user's account is associated with* section above.

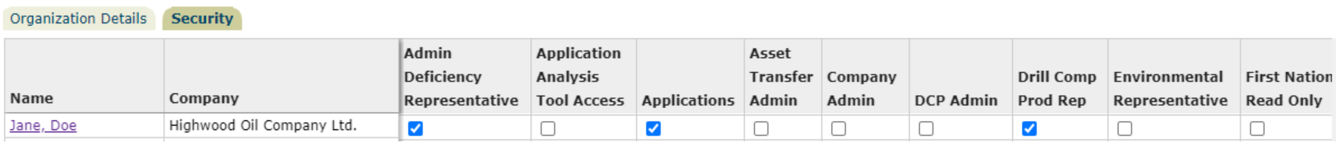
2. Select the user's name:



3. In the Edit Security Contact window that pops up, select the Security tab then check off the security role(s) you wish to add or remove from the user:

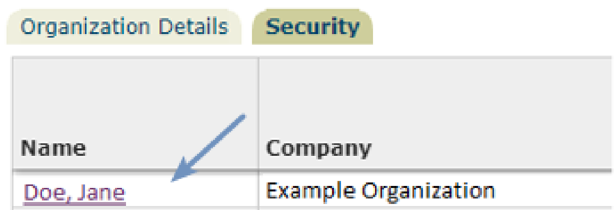


4. Select Save. This will close the Find Organization Security pop up window and take you back to the Security tab.
5. The security role(s) that were added or removed are now updated on the Security tab:



Update the details of a user's account

1. Select the user's name from the Security tab:



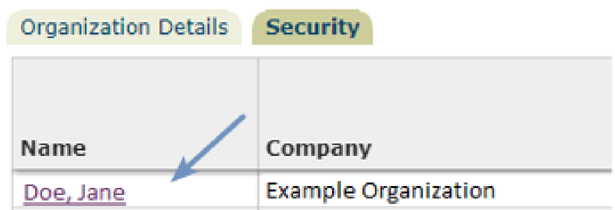
2. Select the Details tab when the Edit Security Contact window pops up:

Please note that you cannot edit a user's details if they are currently associated to another organization. They must be associated to your organization.

3. Make the required updates to the user's details. For example, their e-mail.
4. Select Save. This will close the Find Organization Security pop up window and take you back to the Security tab.

Remove a user from your organization

1. Select the user's name from the Security tab:



2. In the Edit Security Contact window that pops up, select None from the Company drop down to disassociate the user from your organization:

3. Select Save.
4. Select Delete. This will close the Find Organization Security pop up window and take you back to the Security tab the name of the user will no longer show.
5. Select Save.

Didn't find what you were looking for? Refer to the Online Systems Accounts page on www.bc-er.ca for more information regarding Online Systems accounts, usernames, passwords, security roles and company administration.