

AWA HELICAL DATABASE - HOW TO'S

Adding additional users and changing user policies

This factsheet will cover how to:

- add additional users to your AWA membership Helical account
- update policies on current users (IE: what areas they can access and what they can request or edit)

<u>Please note</u>: Only the "Owner" of the account and any users with "Owner level authority" will be able to add additional users and update user policies.

Via the AWA homepage, members can navigate to the helical website but clicking on "AWA DATABASE" and then "AWA HELICAL DATABASE.



- 1. Once you have logged into the Helical database, navigate to the "Account" tab
- 2. Click "edit".

🔖 Australian Wagyu	I ∨ Admin Portal 🖪				Powered by Helical	© Caroline Triebe
Role: Owner						2 Edit 🖉
 Animals Test Requests 	Account Name CAROLINE TRIEBE	Joined At 10/08/2018	Membership Name None	Type Associate		
	Financial Status Financial	Herd Prefix None	Web Homepage None	Date Resigned None		
\$ Invo	Transactions Held					
	Users ► What are the policies?					
	User				Policy	Notifications
	Caroline Triebe (caroline@wagyu.o	rg.au)			Owner	all



3. Click on the "What are the policies" drop down menu to view the available policies and what each policy encompasses.

🔖 Australian Wag	yu 🗸 Admin Portal 🖪				Powered by Helical	(2) Caroline Triebe
Role: Owner Animals Test Requests Account Automatican	Account Name CAROLINE TRIEBE Financial Status Financial Transactions Held	Joined At 10/08/2018 Herd Prefix None	Membership Name None Web Homepage None	Type Associate Date Resigned None		Save
	 Users What are the policies? Mouner : Owner of the entite Admin : Staff responsible Accounts : Accounting state Manager : Farm manager in permissions Consultant : Person interan permission to ther users in Owner Level Authority : Person permission gives the person entity owner 	ty, has full access to all resources w for interaction with and requesting tr ff processing involces and paying ac of equivalent position with elevated I cting with and requesting transaction o act on behalf of the entity ion granted "Owner level" permission in the same ability to modify entity in	ithin the entity ransactions from AWA counts level of responsibility of managing other staff ns from AWA as well as the ability to grant ns by the entity owner. BEWARE - this level of formation as well as adding users as you, the			
	User Caroline Triebe (caroline@w	aqvu.org.au)			Policy Owner	Notifications
	Enter email					

4. To amend the policies for users that already have access to the account, select the drop-down menu under the policy column and select the policy that best suits what you require that user to be able to access and complete.

🔖 Australian Wagyu	V Admin Portal				Powered by Helical	(2) Caroline Triebe
Roie: Owner Animals Animals Account S Invoices	Account Name CAROLINE TRIEBE Financial Status Financial Transactions Held	Joined At 10/08/2018 Herd Prefix None	Membership Name None Web Homepage None	Type Associate Date Resigned None		Save 🖹 🗙
	Users V What are the policies? Owner : Owner of the entity, has Admin : Staff responsible for inte Accounts : Accounting staff proce Manager : Farm manager of equiv permissions Consultant : Person interacting wi permission to other users to act o Owner Level Authority : Person gra permission gives the person the s entity owner	full access to all resources within the raction with and requesting transactio essing invoices and paying accounts alent position with elevated level of re th and requesting transactions from A n behalf of the entity ned "Owner level" permissions by the ame ability to modify entity informatio	antity ns from AWA sponsibility of managing other staff WA as well as the ability to grant entity owner. BEWARE - this level of n as well as adding users as you, the			
	User Caroline Triebe (caroline@wagyu.or Enter email	g.au)		4	Policy Owner Owner Admin Accounts Manager Consultant Owner Level Authority	Notifications



5. To add a user – type their email address in the "Enter email..." box. Once entered, click anywhere outside the box or press the enter key to add the user email address.

🔖 Australian Wa	agyu 🗸 🛛 Admin Portal 🖸				Powered by Helical	(2) Caroline Triebe
Role: Owner Animals Test Requests Account S Invoices	Account Name CAROLINE TRIEBE Financial Status Financial Transactions Held	Joined At 10/08/2018 Herd Prefix None	Membership Name None Web Homepage None	Type Associate Date Resigned None		Save 🗈 🗙
	Users V What are the policies? Owner : Owner of the ent Admin : Staff responsible Accounts : Accounting sta Manager : Farm manager permissions Consultant : Person intera permission to other users Owner Level Authority : Per permission gives the persu entity owner	Users What are the policies? Admin : Staff responsible for interaction with and requesting transactions from AWA Accounts : Accounting staff processing invoices and paying accounts Manager : Farm manager of equivalent position with elevated level of responsibility of managing other staff permissions Consultant : Person interacting with and requesting transactions from AWA as well as the ability to grant permission to other users to act on behalf of the entity Owner Level Authority : Person granted "Owner level" permissions by the entity owner. BEWARE - this level of permission gives the person the same ability to modify entity information as well as adding users as you, the				
	User				Policy	Notifications
	Caroline Triebe (caroline@wagyu.org.au)				Owner	✓ all ▼
	5 @outlook.com					

6. Once the user has been added, you will need to select what policy level they have access to.

🔖 Australian W	Vagyu 🗸 🛛 Admin Portal 🖪				Powered by Helical	(2) Caroline Triebe
Role: Owner Control Animals Control Test Requests Control Account Control Invoices Control Account Control Con	Account Name CAROLINE TRIEBE Financial Status Financial Transactions Held Users V What are the policies? VWhat are the policies? Vomer : Owner of the ent Admin : Staff responsible Accounts : Accounting stat Accounts : Accounting stat Accounts : Accounting stat Consultant : Person intera permission to other users Owner Level Authority : Per	Joined At 10/08/2018 Herd Prefix None ity, has full access to all resources will for interaction with and requesting tr ff processing invoices and paying acc of equivalent position with elevated le cting with and requesting transaction to act on behalf of the entity son granted "Owner level" permission in the same ability to modify entity inf	Membership Name None Web Homepage None thin the entity ansactions from AWA counts wel of responsibility of managing other staff s from AWA as well as the ability to grant s by the entity owner. BEWARE - this level of formation as well as adding users as you, the	Type Associate Date Resigned None		Save 🔝 🗙
	User				Policy	Notifications
	Caroline Trebe (caroline@w	agyu.org.āu)		6	Owner Owner Owner Admin	
					Acco ts Managur Consultant Owner Level Authority	