



## AWA HELICAL DATABASE – HOW TO'S

### Adding additional users and changing user policies

This factsheet will cover how to:

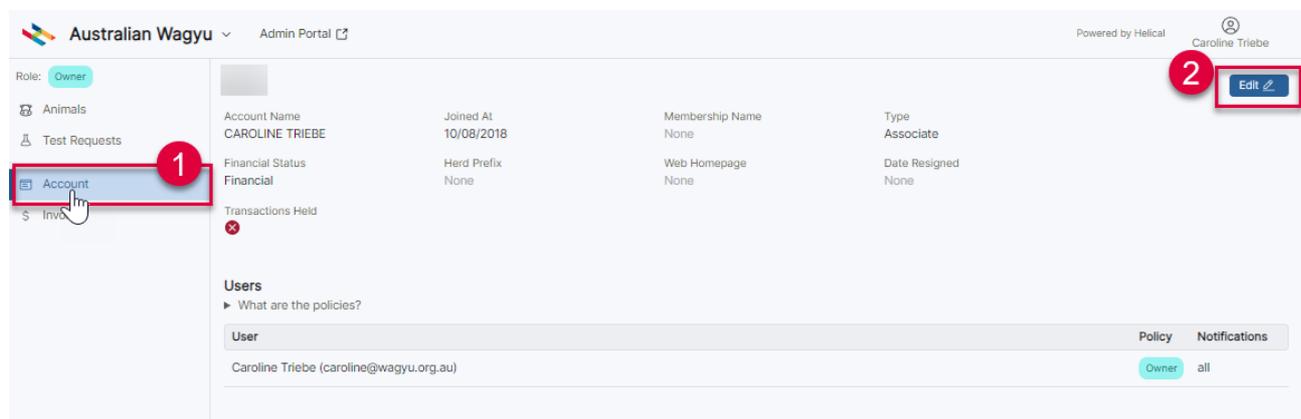
- add additional users to your AWA membership Helical account
- update policies on current users (IE: what areas they can access and what they can request or edit)

**Please note:** 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”.





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

**Australian Wagyu** Admin Portal Powered by Helical Caroline Triebe

Role: **Owner**

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

Transactions Held: ✖

**3** **Users**

- ▼ What are the policies?
- Owner : Owner of the entity, has full access to all resources within the entity
- 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 entity owner

User: Caroline Triebe (caroline@wagyu.org.au) | Policy: Owner | Notifications: all

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** Admin Portal Powered by Helical Caroline Triebe

Role: **Owner**

Account Name: CAROLINE TRIEBE | Joined At: 10/08/2018 | Membership Name: None | Type: Associate

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User: Caroline Triebe (caroline@wagyu.org.au) | Policy: Owner | Notifications: all

**4** Policy dropdown menu is open, showing options: Owner, Admin, Accounts, Manager, Consultant, Owner Level Authority.



- 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.

The screenshot shows the Australian Wagyu Admin Portal. The user profile for 'CAROLINE TRIEBE' is displayed. The 'Users' section lists various roles and their permissions. At the bottom, there is a 'User' table with columns for 'User', 'Policy', and 'Notifications'. The 'User' column contains 'Caroline Triebe (caroline@wagyu.org.au)'. A red box highlights the email input field below the table, which contains '@outlook.com'. A red circle with the number '5' is placed next to the box.

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

The screenshot shows the Australian Wagyu Admin Portal. The user profile for 'CAROLINE TRIEBE' is displayed. The 'Users' section lists various roles and their permissions. At the bottom, there is a 'User' table with columns for 'User', 'Policy', and 'Notifications'. The 'User' column contains 'Caroline Triebe (caroline@wagyu.org.au)'. A red box highlights the policy dropdown menu below the table, which is open and shows a list of roles: 'Owner', 'Admin', 'Accounts', 'Manager', 'Consultant', and 'Owner Level Authority'. A red circle with the number '6' is placed next to the dropdown menu.