

Appendix F – Edit Profile

Step by step guide for editing a person's profile details page.

This workflow is used to update a person's personal and work contact details (email, mobile, emergency contact details etc).

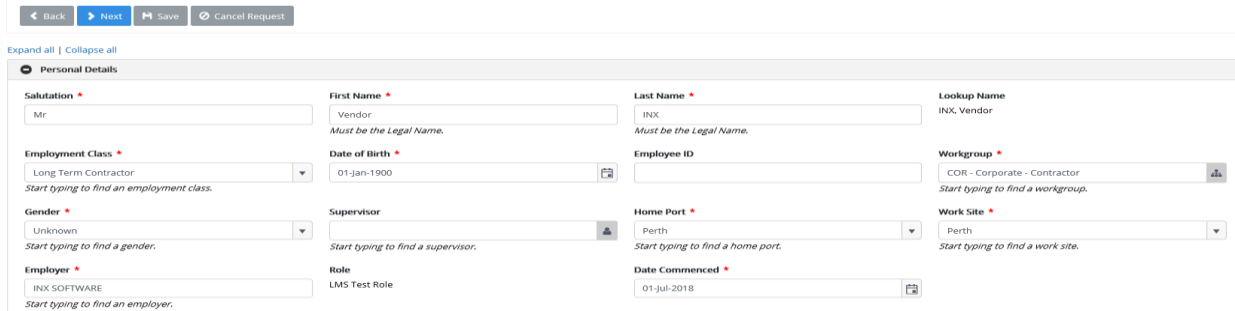
1.	<p>Open the +Process module using the following link https://inx-process.nsrld.com/</p>																				
2.	<p>The Dashboard will open, click on the 'Edit Profile' tab under 'Create a Workflow Request'.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Dashboard</p> <p>Create a Workflow Request</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 30%; border: 1px solid #ccc; padding: 2px;"> <p style="text-align: center; margin: 0;">+ Mobilisation v5</p> </div> <div style="width: 30%; border: 1px solid #ccc; padding: 2px;"> <p style="text-align: center; margin: 0;">+ Change Roster / New Booking v5</p> </div> <div style="width: 30%; border: 1px solid #ccc; padding: 2px;"> <p style="text-align: center; margin: 0;">+ Cancel Bookings v5</p> </div> </div> <div style="margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; width: 30%;"> <p style="text-align: center; margin: 0;">+ Edit Profile v5</p> </div> </div> </div>																				
3.	<p>Search Person Profile page will open.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Edit Profile Ref: 0000115</p> <p>Draft</p> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> 1 Search Person Profile 2 Person Details 3 Approval Details 4 Stage Summary </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Next Cancel Request </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Person Profile Search Criteria</p> <p>Search For</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%; margin-bottom: 5px;"></div> <p>Employer Company Level</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%; border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <div style="width: 45%; border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> </div> <p style="font-size: 0.8em; margin: 0;">Start typing to find an employer. Start typing to find a Company Level.</p> <p style="text-align: left; margin: 0;">Search</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <thead> <tr> <th style="width: 30%;">Lookup Name</th> <th style="width: 30%;">Employer</th> <th style="width: 30%;">Workgroup</th> <th style="width: 10%;">Date of Birth</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="height: 40px;"> </td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; align-items: center; font-size: 0.8em;"> ◀ ▶ ⏪ ⏩ 20 items per page No items to display </div> </div>	Lookup Name	Employer	Workgroup	Date of Birth																
Lookup Name	Employer	Workgroup	Date of Birth																		
4.	<p>To search, type part of the person's first or last name (not both) in the search box and then click on the search button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Person Profile Search Criteria</p> <p>Search For</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">vend</div> <p>Employer Company Level</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%; border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <div style="width: 45%; border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> </div> <p style="font-size: 0.8em; margin: 0;">Start typing to find an employer. Start typing to find a Company Level.</p> <p style="text-align: left; margin: 0;">Search</p> </div>																				
5.	<p>Profiles matching the naming description will then display at the bottom of the page.</p> <p>Check the date of birth matches the profile of the person requiring their details updated and then double click on the Lookup Name to open the profile.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 30%;">Lookup Name ↑</th> <th style="width: 30%;">Employer</th> <th style="width: 30%;">Workgroup</th> <th style="width: 10%;">Date of Birth</th> </tr> </thead> <tbody> <tr> <td>DESERT GOLD VENDING - KUNDANA Inactive</td> <td>Desert Gold Vending Machines</td> <td>KAL - EKJV - RHP Mining - Tech - UG Contractor</td> <td></td> </tr> <tr> <td>GOVENDER, Indran Inactive</td> <td>Baseline Group</td> <td>PAU - Administration - Surface Contractor</td> <td>23/02/1969</td> </tr> <tr> <td>INX, Vendor</td> <td>INX SOFTWARE</td> <td>ALL - Site Transfers</td> <td>01/01/1900</td> </tr> <tr> <td>KAL - DESERT GOLD VENDING - KB Inactive</td> <td>Desert Gold Vending Machines</td> <td>KAL - KB - Mgmt Admin - Surface Contractor</td> <td></td> </tr> </tbody> </table>	Lookup Name ↑	Employer	Workgroup	Date of Birth	DESERT GOLD VENDING - KUNDANA Inactive	Desert Gold Vending Machines	KAL - EKJV - RHP Mining - Tech - UG Contractor		GOVENDER, Indran Inactive	Baseline Group	PAU - Administration - Surface Contractor	23/02/1969	INX, Vendor	INX SOFTWARE	ALL - Site Transfers	01/01/1900	KAL - DESERT GOLD VENDING - KB Inactive	Desert Gold Vending Machines	KAL - KB - Mgmt Admin - Surface Contractor	
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6. The People Profile details will appear automatically populated, update the required fields.

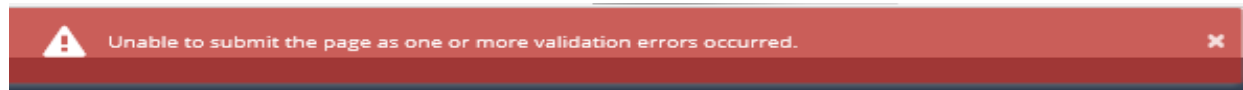
Example: Employer / Mobile Phone / Email Address / Home Address / Emergency Contact Details etc.



Once the person details page has been completed, click on the 'Next' button, at any stage you wish to exit and return later click on the 'Save' button. If you do not want to go ahead with the profile click on 'Cancel Request'.



Note: If mandatory fields are not completed the following error message will appear and you won't be able to continue to the next page until the fields have been populated.



7. On the 'Approval Details' tab, one level of approval will need to be selected.



8. Click in the 'Approver' drop down list and select the applicable Site Administration.

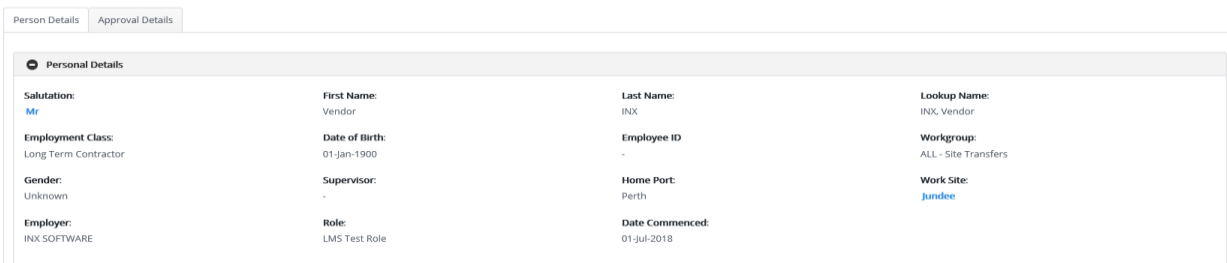


Once the 'Approval Details' have been completed, click on the 'Next' button, at any stage you wish to exit and return later click on the 'Save' button. If you do not want to go ahead with the profile click on 'Cancel Request'.



9. The 'Stage Summary' tab will summarise all of the details provided for the 'Person Profile' update.

Note: All changes /amendments to the profile will be highlighted in blue.



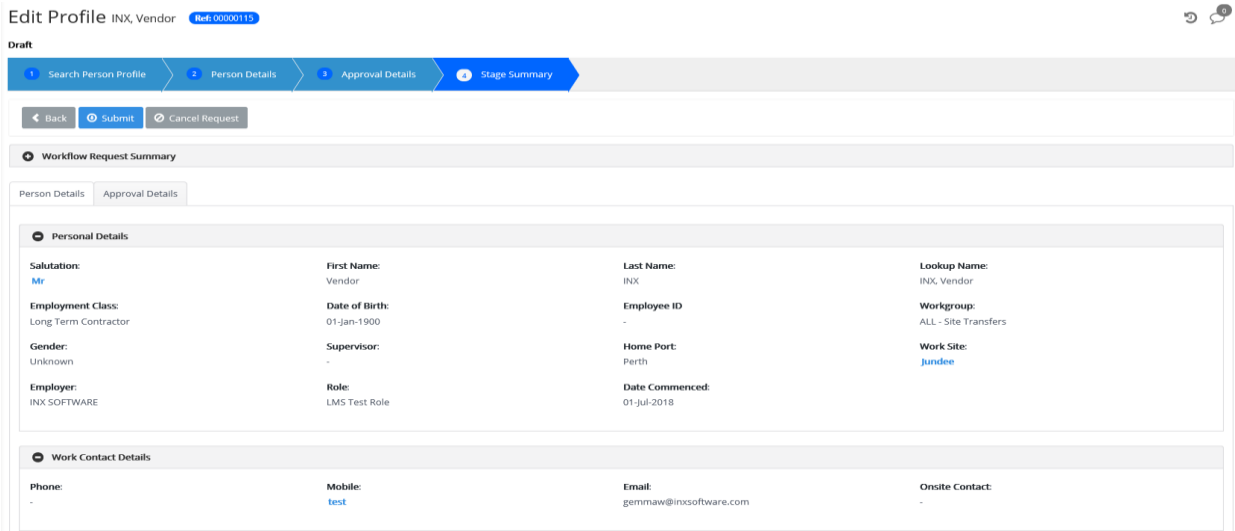
Click on each tab and review the details that have been supplied, if any changes are required click on the 'Back' button which will take you back to the editable profile where you can move back through the tabs.



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10. Once the profile is complete and all information provided is correct click on the 'Submit' button. The profile will then be sent to the Site Administrator for approval. Click on the Dashboard to exit the profile.



11. **Note:** At any stage you would like to communicate or leave a message for the administrator you are able to insert a comment within the request.

At the top right hand corner of the profile there is a speech bubble that will show all communication / comments.

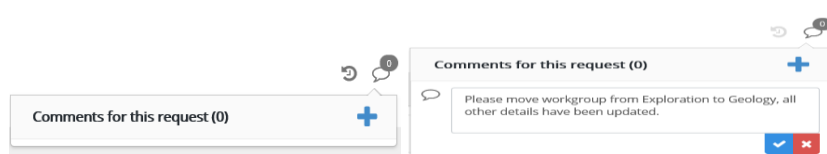


Once a comment has been added to the system it can't be deleted and will remain within the profile where both the Administrator and Initiator will be able to view.

Note: Email notifications will not occur for internal comments. Once a comment has been added, to view the person must click on the speech bubble icon within the request.

Notifications for comments will only occur via email when the profile has been declined or returned to the initiator.

To create a new comment, click on the speech bubble and a notification drop down box will appear, click on the blue + button to add a new comment. Once a comment has been added click on the blue tick to save or on the red cross to delete.



Approval Notifications:


12. **Returned for Editing:**

If the edit profile request has been returned the following email notification will be sent.

Within the email refer to the comments and the reason behind the return.

You will need to go back into the request, (click on the request reference number to open the profile), edit the profile as requested and then re-submit for approval.

Edit Profile : INX, Vendor : Returned

 INX@nsrltd.com
To Ashton Yovich (Corporate)



Request Reference: 115
Workflow Request: Edit Profile
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Returned
Comment: This request has been returned to you for additional actions
Reason: Incorrect email address, please provide new email.

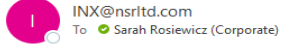
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13. Committed:

If the edit profile request has been approved the following email notification will be sent.
All personal details have uploaded into INX and no further action is required for this request.

Edit Profile : INX, Vendor : Committed




Request Reference: 143
Workflow Request: Edit Profile
For: INX, Vendor
Requested By: ROSIEWICZ, Sarah
Stage: Committed
Comment: This request has been completed

14. Declined or Cancelled:


If the edit profile request has been declined or cancelled the following email notifications will be sent and the request will then be closed in the system and will not upload to INX.
For further information regarding the decline or cancel please see the Site Administrator.

Edit Profile : INX, Vendor : Declined



Request Reference: 115
Workflow Request: Edit Profile
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Declined
Reason: Edit profile has been declined, incorrect profile.
Comment: This request has been declined

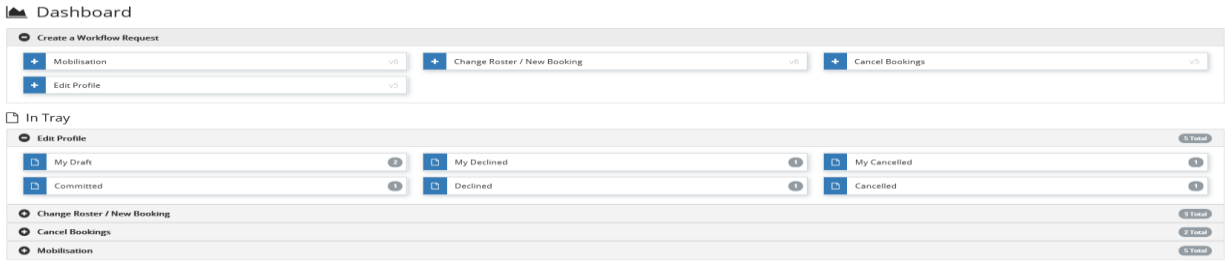
Edit Profile : INX, Vendor : Cancelled



Request Reference: 116
Workflow Request: Edit Profile
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Cancelled
Comment: This request has been cancelled

Dashboard Home Page

15. At any stage, if you have saved and exited the Edit Profile workflow, you can reopen and continue editing the profile.
Go to the Dashboard on the +Process home page, navigate down to the In Tray - under 'Edit Profile', click on 'My Draft'.



The workflow request screen will open, click on the reference number to open the Edit Profile request.

Re...	Workflow Type	Status	Initiator	Person
167	Edit Profile	Draft	YOVICH, Ashton Leigh	INX, Vendor
168	Edit Profile	Draft	YOVICH, Ashton Leigh	

The profile will open to the last screen that was saved and editing can continue.

REVISION HISTORY

Revision Number	Date	Changes made to document
1	20/01/2020	New Document
2	11/05/2023	Full revision of content. Merged Steps 6 & 7 together, general formatting throughout document

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