BlueQ User Guide: Account Manager

Welcome to BlueQ! As a BlueQ Account Manager, you can track and manage your organisation's compliance online, as well as maintain the qualifications and accreditations for your current users. The below instructions provide guidance on how to do several common tasks in BlueQ.

How to View Current Users

All users who are currently tied to your BlueQ account will be visible to any Account Manager. To view them:

1. Click on **People**
2. Click **View People**
3. Click **Search** to update the data
4. You can filter for a specific person by typing in the name beneath the **Clear** button where it says **Type to Filter**
   Note: to view BlueQ Account Managers for your organisation, click the person icon at the top right, then View Organisation Account.

How to Change a Role for a User

1. At the top of the page, click **People**
2. Click **View People**
3. Click **Search** to bring the data up to date
4. Locate the person you wish to view (you can filter on the right-hand side)
5. Click directly on the role for this person
6. In the pop-up, type in the new role and select it from the list that populates
7. Make sure the role is listed in a **grey box**, then click **Save**
8. To delete a role, just click the **X** next to the role and **Save**
   Note: A user can have more than one role if needed.

How to View Compliance Requirements

Compliance requirements are set by role and can be updated when needed. To view current requirements:

1. Click **Compliance**
2. Click **Requirements**
3. Select the **Role** that you wish to view requirements for
   Note: Not all roles that are visible have requirements set. There may be roles listed that do not apply to your organisation.

If you are a part of a larger organisation, requirements may be set at a higher level which will be noted on the requirement in red text.

How to Add a New User

1. At the top of the page, click **People**
2. Click **Create New Account**
3. Enter in the First Name, Last Name, Email Address (**must be unique**), and Role
4. Select whether the person should also be an Account Manager (having access to the whole organisation)
5. Select whether the person should receive their login email (this can be sent later if needed)
   Note: If the email already exists, please reach out to support@blueq.com.au to have the user account linked to your organisation.

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How to Add a Qualification for a User

1. At the top of the page, click **People**
2. Click **View People**
3. Click **Search** to bring the data up to date
4. Locate the person you want to upload the qualification for (you can filter on the right-hand side)
5. Click the **Add Qualification** (the document with the plus sign)
6. Enter in the data for the qualification
   Note: Make sure the Qualification Title matches that of the requirement to ensure it is marked towards the correct requirement. This list should prepopulate for you.

How to View a User's Qualifications

1. At the top of the page, click **People**
2. Click **View People**
3. Click **Search** to bring the data up to date
4. Locate the person you wish to view (you can filter on the right-hand side)
5. Click on the person's name and a list of their uploaded qualifications will appear at the bottom of the page

How to Unlink a User from your Organisation

1. At the top of the page, click **People**
2. Click **View People**
3. Click **Search** to bring the data up to date
4. Locate the person you want to remove (you can filter on the right-hand side)
5. Click the **Remove from Organisation** (the X)
   Note: This person will now be unlinked from your organisation, but will still have access to their personal account.

How to See Why a User is Not Compliant

1. At the top of the page, click **Compliance**
2. Click **Issues**
3. Locate the user you're looking for and click **View**
4. The requirements the user still needs to upload will be listed

How to Resend a Login Email

1. At the top of the page, click **People**
2. Click **View People**
3. Click **Search** to bring the data up to date
4. Locate the person you wish to view (you can filter on the right-hand side)
5. Click **Send/Resend Take Ownership Email** (the envelope icon)

How to Manage Groups

1. At the top of the page, click **People**
2. Click **Manage Groups**
3. From here, you can assign individuals to different groups, create new groups, or remove groups that are no longer applicable.

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Helpful Tips

- Your qualifications will be one of four colours that correspond to the different statuses they can hold:
    - Green: Qualifications that have been verified by our automatic verification process.
    - Blue: Non-expired, valid qualifications that have not been verified automatically.
    - Yellow: Any qualifications that are expiring in the next 90 days.
    - Red: Expired or invalid qualifications.
- There are three values visible in the Acc. Claimed column on the View People page:
    - **No** - no login email was sent to this person
    - **Pending** - a login email(s) was sent, but the person hasn't logged in yet
    - **Yes** - the person has logged into their account
- To be listed as compliant for a certain requirement, ensure that Qualification Title matches that of the requirement exactly.
- For a Working with Children Check to verify (turn green)
    - The Qualification Title must be "Working with Children Check (VIC)"
    - The Institution must be "Department of Justice & Regulation (VIC)"
    - The Last name and Document/Card number must match exactly
- The expiration date will pull automatically once a Working with Children Check is verified.
- The View People page stores your most recent search information – to view the most up to date data and any recent changes, just refresh the page or click Search.

Questions and Support

Any questions regarding accessing or using BlueQ, or uploading documents can be directed to support@blueq.com.au. Helpful tutorial videos and FAQs are also available.