

# User Guide – Account Administrators

This page is a resource for administrator users who have a subscription to BSI Knowledge. Administrator users have access to functionality to facilitate the overall management of their organization's BSI Knowledge subscription. If you are unable to find the information you require, you can find the contact information for the customer experience team at the bottom of this page.



## Getting started – setting up your account

### How to complete account set up and log in

1. Click the Create Account link on your login email, which will direct you to the complete account page on BSI Knowledge.
2. Enter your first and last name to set your username, then set a password to complete account set up.

Alternatively, you can [use the password reset link](#) to access the account set up page.

A screenshot of a web form titled "Complete your account". It contains two input fields for "First name" and "Last name", a "Password" field with a "Show" toggle, and a "Complete Account" button at the bottom. A note below the password field says "Use 10 or more characters".

Please note, if you previously had a BSOL (British Standards Online) subscription, you can use the same email address and password to log in to BSI Knowledge.

You will be prompted at the complete account set up stage if this is the case.

It is also not possible to change your first and last name username after completing account set up. If you need to change it, you will need to contact BSI Customer Experience.

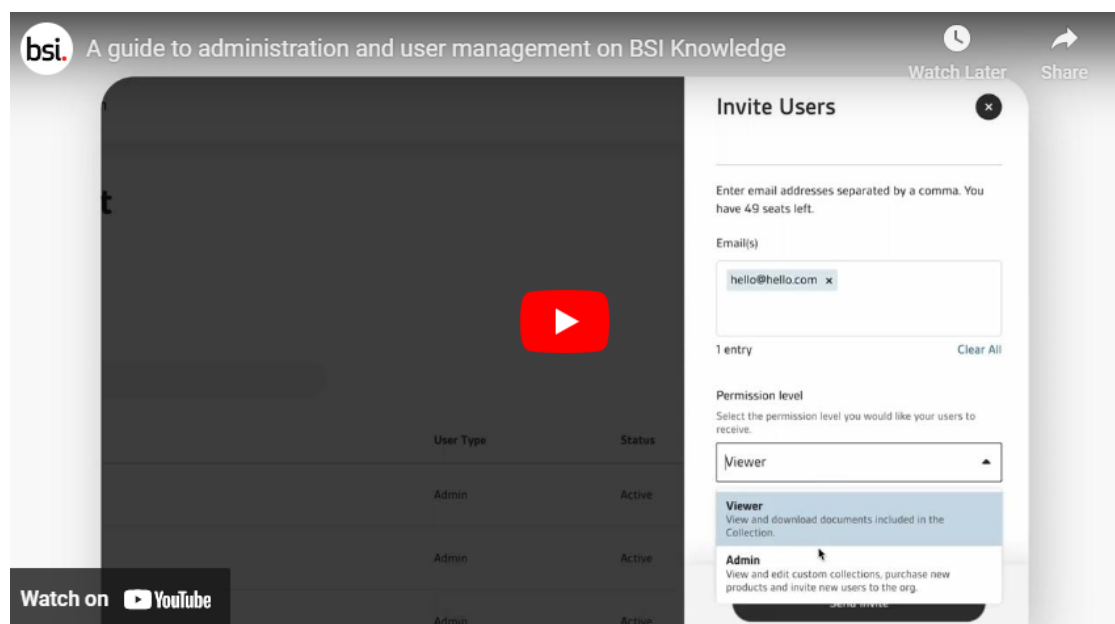
## Account information

After logging in, the administrator menu can be found towards the top-right of the screen by clicking on your initials and selecting Administrator Settings.

Under the user management tab, you can see:

- The number of seats available on your subscription.
- Users who currently have access or have been invited to your organization's subscription.
- A search bar to search through users.
- A toggle to show user type administrator or viewer.
- The Invite Users button to add user.

Watch the [video](#) below for more on administration and user management.



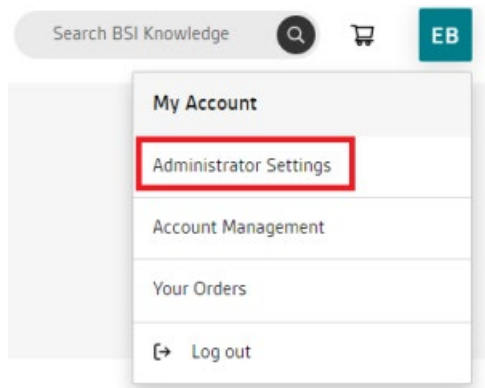
---

## Getting started – user management

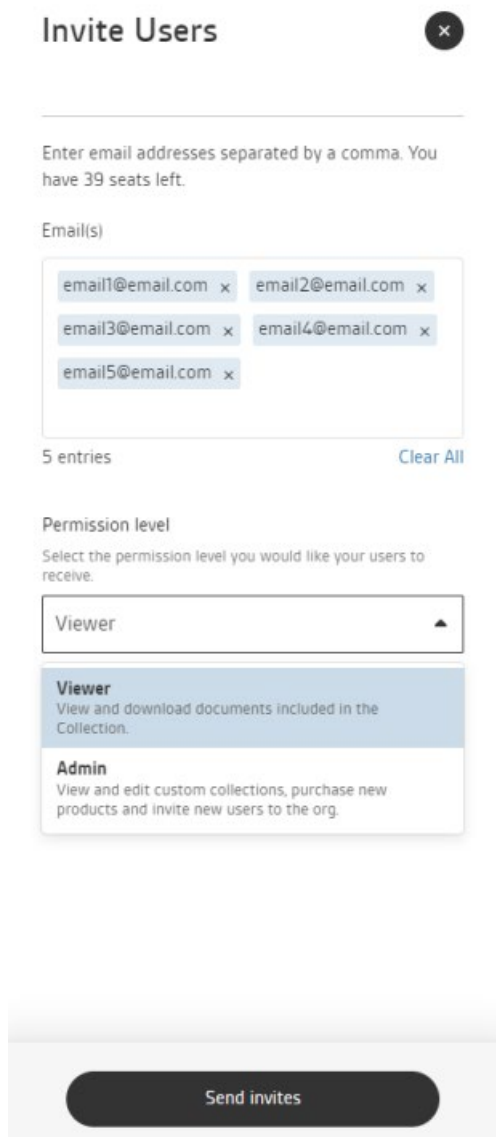
As an administrator, you can add and remove users from your organization's BSI Knowledge account.

### Adding users

1. Navigate to the user management screen and tab by clicking on your initials and Administrator Settings towards the top-right of the screen.



2. On the user management screen click the Invite Users button towards the right side of the screen, which will open an overlay box.



3. Enter the email address(es) of the users you wish to add to the subscription, set the permission level (administrator or viewer) and click send invites.
4. Multiple users can be added at the same time by separating the email addresses with a comma.
5. Permission levels need to be the same for all users that are added simultaneously. Therefore, you may need to add administrator users and viewer-level users separately.

Once added, all user types will need to set a first and last name username. The username cannot be changed after the account is set up.

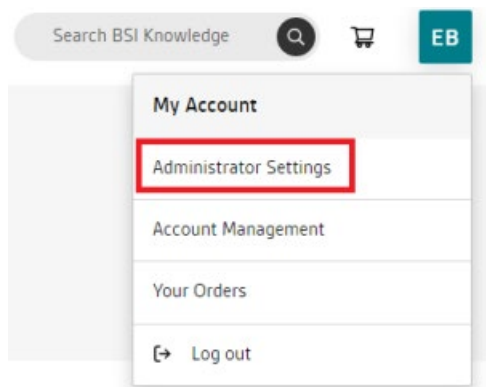
Users will also need to set a password. The password can be changed by the user at any time in the account management settings or by clicking on this password reset link.

If a user previously had access to BSOL (British Standards Online) and they use the same email address to set up their BSI Knowledge account, they will be prompted to use their existing details.

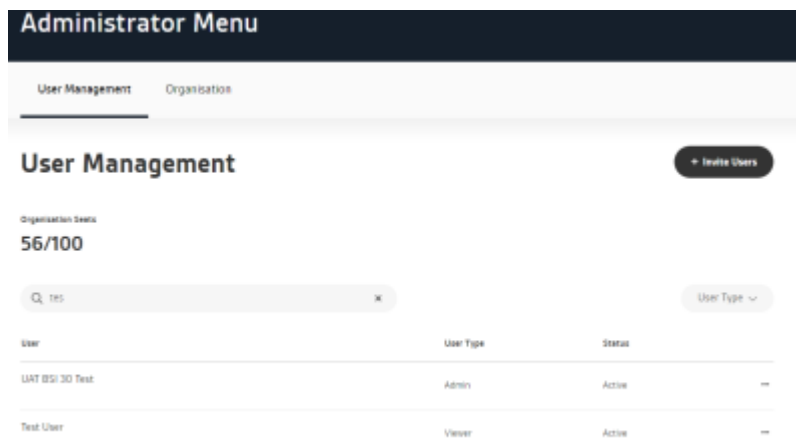
## Removing users

To remove a user:

1. Navigate to the user management screen and tab by clicking on your initials and Administrator Settings towards the top-right of the screen.



2. Find and select the user for removal. If needed use the search bar to search for the user's name.



3. Click on the username to open an overlay box.

## User details ✕

---

**Name**  
Test User

**Email Address**

**User Type**  
Viewer

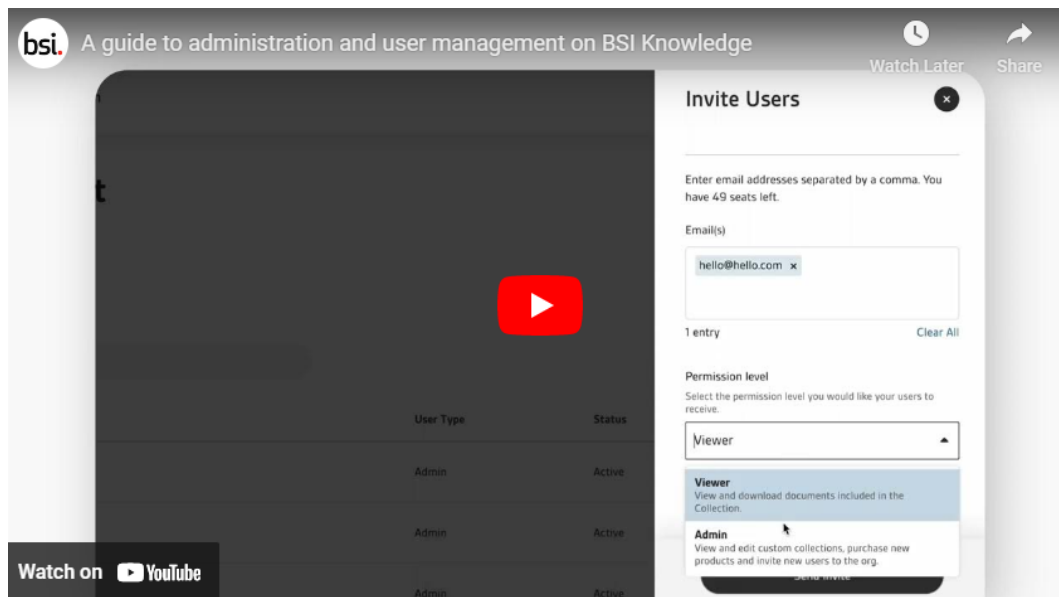
**Status**  
Active

**Last Active**  
15 days ago

Remove Access

4. Click Remove Access, this will generate a final pop-out box confirming that you want to fully revoke the user's access.

Watch the [video](#) below for more on user management.

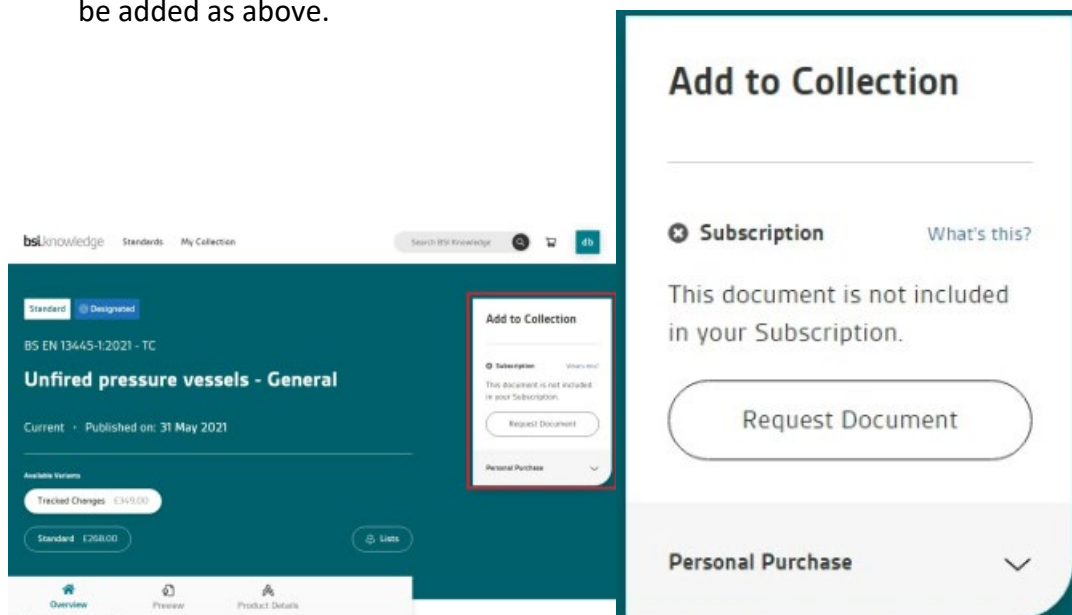


## Getting started – adding standards content to your subscription

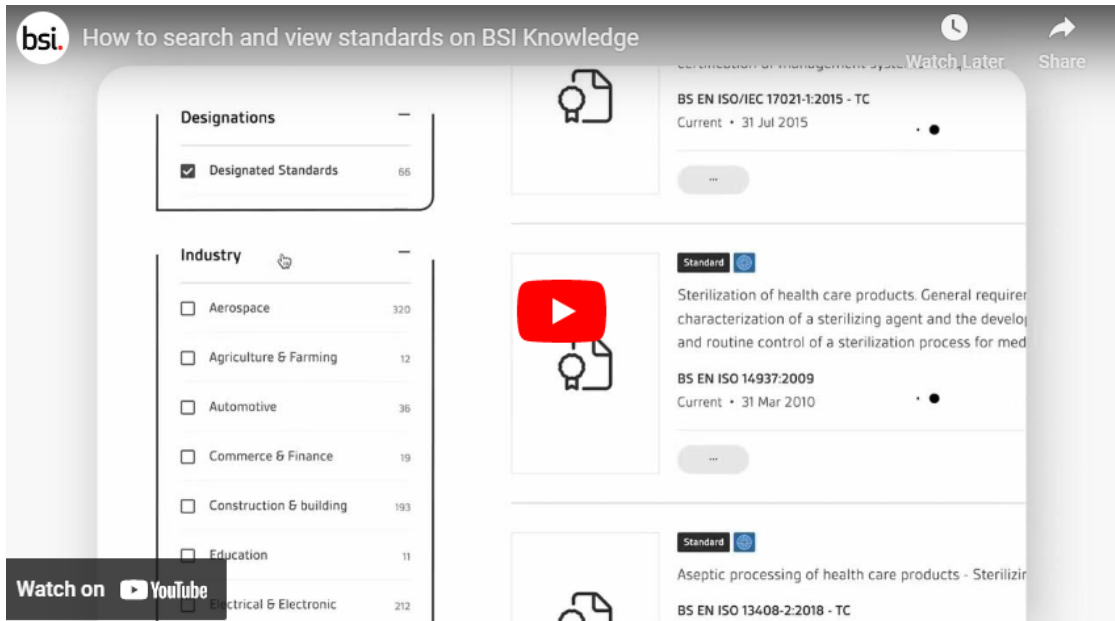
Certain types of BSI Knowledge subscription allow you, as an administrator, to add standards to your organization's account.

If you have a custom collection subscription or a custom collection as part of your subscription, there are two main ways of adding standards:

1. Use the BSI Knowledge search and filter functionality to find the standards you and your organization require, navigate to the standard product page and add them to your subscription.
2. Users with viewer-level access to your organization's subscription can request that a standard document be added to your organization's collection when they click Request Document on the standard product page. If a request is made, as an administrator you will receive an email notification. You can then decide whether to add the standard and it can be added as above.



Watch the [video](#) for more on searching, viewing and adding standards documents on BSI Knowledge.



---

## Getting started – setting up email notifications

You and other users within your organization can follow standards with email alerts and lists.

Email lists notify you when changes are made to a standards document, such as when a standard is being reviewed or withdrawn and when new standards documents are added to the list.

Administrators will receive notifications when changes are made to any standard in their organization's subscription, regardless of whether they are added to a list.

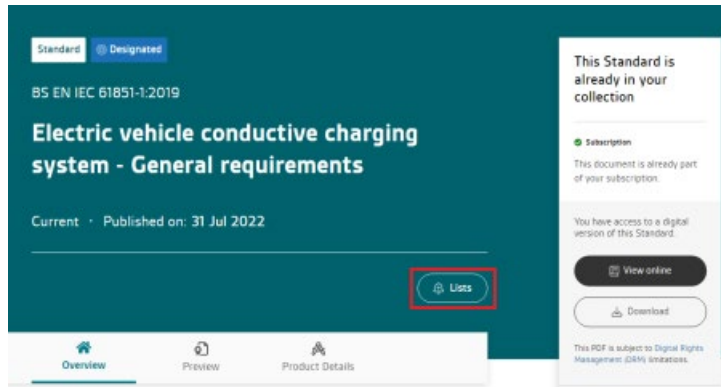
When setting up an email list you can name it and add a description, for example, you might want to group standards by topic.

Email lists can also be set up in the My Lists section within My Collection. If you are logged in to your account you can click [here](#) to visit the My Lists page.

Notifications, whether they are sent and how frequently, can only be changed by the user who sets up the list. Other list members cannot change the notification settings.

### How to set up a new list

The quickest way to set up a new email alert is to navigate to the standard document page and click the bell icon, (which also says lists on desktop).



This will prompt you to either add the standard to an existing email list or set up a new list.

1. As above, click the bell icon on a standards product page to bring up the pop-over.

**Lists** [Close]

Existing [Create New]

List Name  
What would you like to call your list?

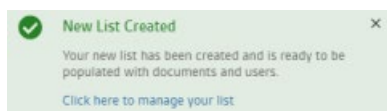
List Description  
Why was this list created?

Include yourself in this list

Create List

Close

2. Select the Create New tab and complete the relevant fields.
3. Click Create List.
4. You will see a notification that your list has been successfully created.



5. The notification has a link to manage the list if needed.

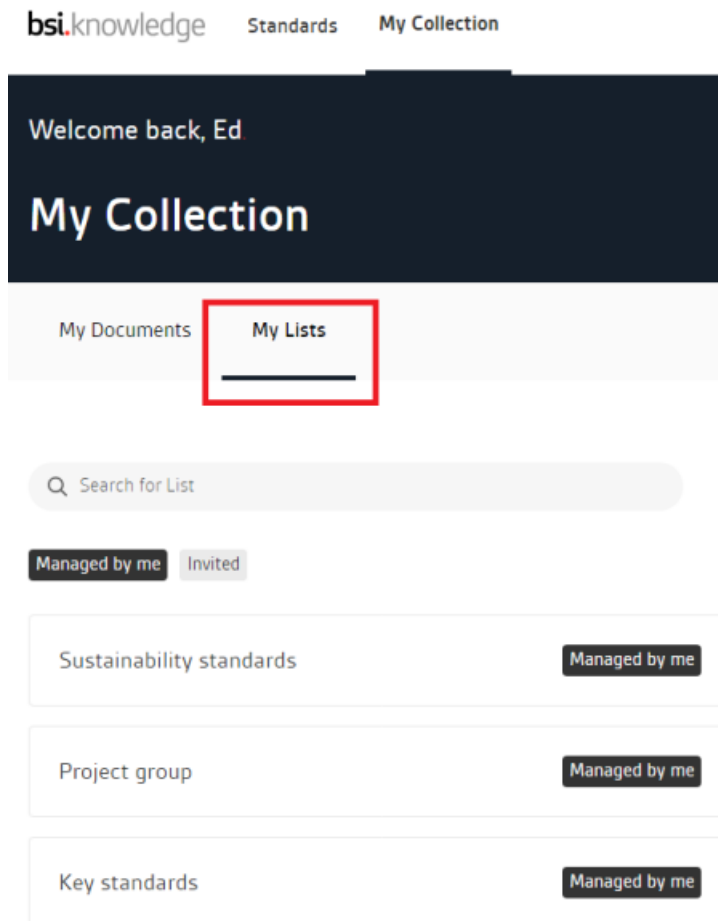


## Managing email lists and notifications

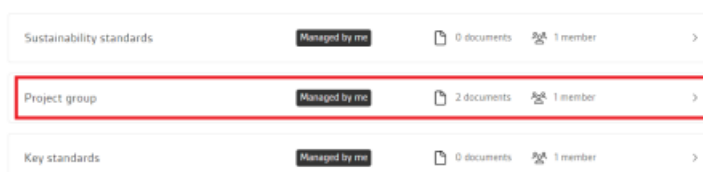
Any user (administrator or viewer-level) can set up notifications and email lists, and add users to email lists. Organizations that use email notifications, can therefore choose how to manage them.

To manage email notifications:

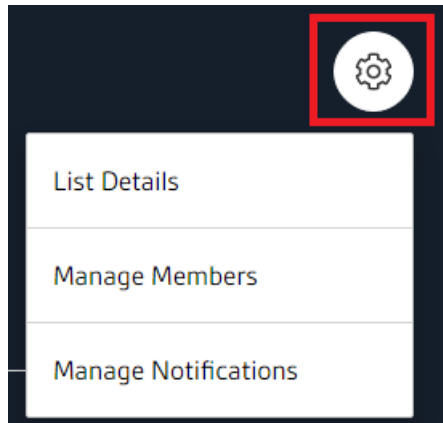
1. Click My Collection in the top navigation and select My Lists.



2. If you have email lists that have already been set up, you will see them on this home screen.
3. If you have set up, or been added to a large number of lists, you can use the search bar to find required lists.
4. Select a list by clicking anywhere on the block with the list's name.



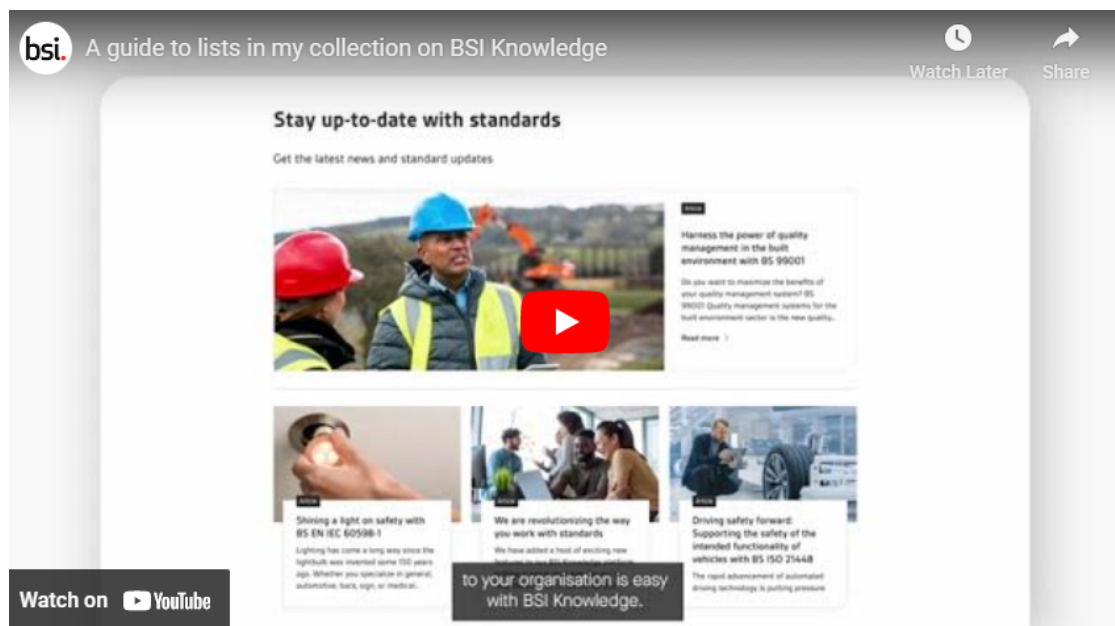
5. Click the gear icon on the next screen.



And select from three pop-over editing options:

1. List Details: edit the email list name and its description.
2. Manage Members: add and remove your organization's users from the email list.
3. Manage Notifications:
  1. Enable or disable email notifications for the list.
  2. Set the notification frequency daily, weekly or monthly.
  3. Select the type of notifications; document status updates, new document added or both.

Watch the [video](#) for more on email lists and notifications.



## What is review mode?

Review mode is an account setting that allows your organization's account administrator to review and replace standards included in your subscription.

For example, review mode might be used when standards have been added by mistake, or when you are looking to replace standards at the end of a subscription renewal period.

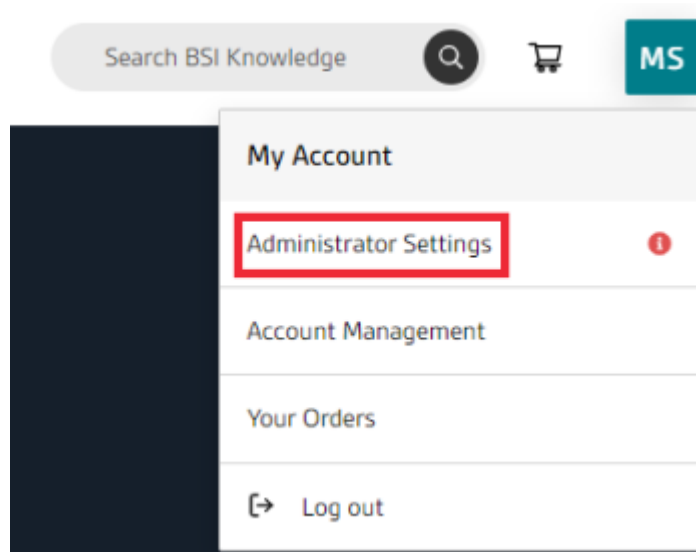
Review mode can be used once at any time per subscription cycle.

It is available to customers with a Custom Collection subscription on BSI Knowledge.

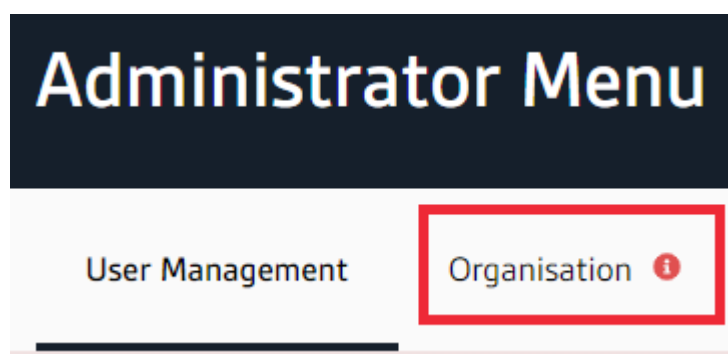
To get set up, your organization's account administrator will need to contact BSI's Customer Experience team requesting for the account to be put into review mode.

You can then follow these steps to update the standards in your collection:

1. Click on your initials towards the top right side of the screen.
2. Click on Administrator Settings from the drop-down menu, an orange notification symbol will display next to the text.



3. The Administrator menu will open, click on the Organisation tab in the top navigation. An orange notification symbol will again display next to the text.



- From the left-hand menu, click Subscribed Content, the orange notification symbol will display next to the text and you will see the following message: "A Custom Collection in this Set is available to be reviewed".

User Management Organisation ⓘ

Organisation Details

Subscription Details

**Subscribed Content** ⓘ >

Contents sets included within your subscription.

ⓘ A Custom Collection in this Set is available to be reviewed. ▾

Status	Start Date	Renewal Date
Active	20 Jan 2023	19 Jan 2121

Module Publisher/Type Contents

ⓘ BSI Custom Collections ▾

- Click into the relevant Custom Collection(s) denoted by the orange notification symbol and text stating: "This Custom Collection is available to be reviewed".

Contents sets included within your subscription.

ⓘ A Custom Collection in this Set is available to be reviewed. ▲

This Custom Collection is in a review period. During this time, you are able to remove any documents within the Collection you may no longer require.

Status	Start Date	Renewal Date
Active	20 Jan 2023	19 Jan 2121

Module Publisher/Type Contents

ⓘ **BSI Custom Collections** ▲

BSI CC6

BSI Knowledge CC400

1 space used | 399 available

ⓘ This Custom Collection is available to be reviewed.

- The collection of standards will display, if you click Save without changes now, i.e. before making any changes, you will exit review mode.

The screenshot shows the 'BSI Knowledge CC400' collection management page. At the top left, there is a 'BSI CC6' label and a link 'How do I manage my Collection?'. The main title is 'BSI Knowledge CC400'. Below the title is a table with the following data:

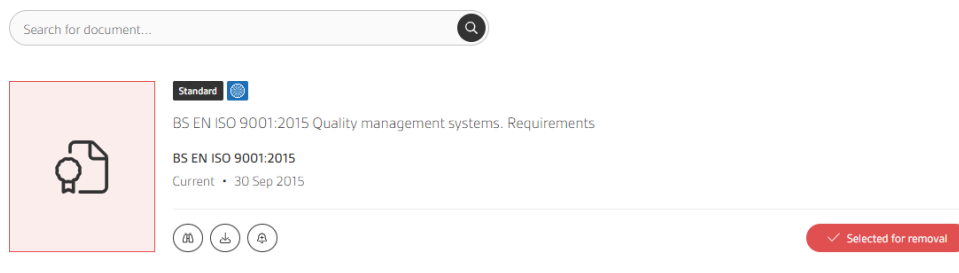
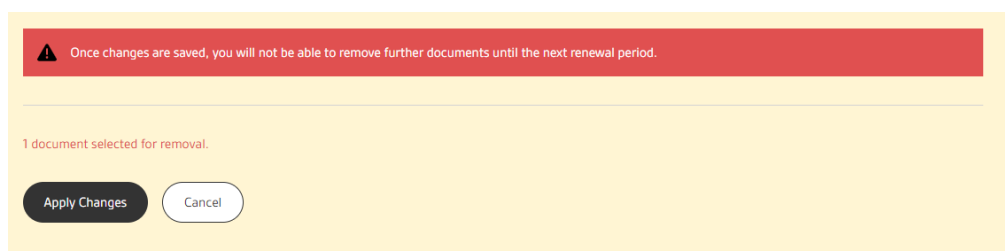
Documents in Collection	Current	Under Review	Withdrawn
1 of 400 used	1	0	0

Below the table, there is a message: 'This collection is available to edit.' followed by 'This Collection is in a review period. Please review and remove any documents you no longer require. Changes will not be applied to the live Collection until you apply and confirm your selection.' A red warning box contains the text: 'Once changes are saved, you will not be able to remove further documents until the next renewal period.' At the bottom, there are two buttons: 'Save without changes' and 'Cancel'.

- If you scroll down you will see your list of standards. If you click on remove, the standard will be selected for removal. You can select as many standards as you require.

The screenshot shows a search bar at the top with the text 'Search for document...'. Below the search bar is a card for a standard. The card has a 'Standard' label and a document icon. The text on the card reads: 'BS EN ISO 9001:2015 Quality management systems. Requirements', 'BS EN ISO 9001:2015', and 'Current • 30 Sep 2015'. At the bottom of the card, there are three icons: a trash can, a share icon, and a refresh icon. A red box highlights the 'Remove' button, which is a trash can icon with the text 'Remove' next to it.

8. Once selected, click "apply changes" towards the top of the page. You will see a warning message to confirm the changes.



9. Once applied, you will automatically exit review mode.
  10. Following the review, if you need a new standard in your collection, [please read the guide on adding standards.](#)
-