



# WA Relationship Authorisation Manager User Guide

## Inviting a person to act on behalf of a business

To act for a business or another entity e.g. a volunteer organisation or a sole trader, a person must have an authorisation.

A business can be a public or private company, partnership, trust, superannuation fund, sole trader, incorporated association, strata title, co-operative, diplomatic/consulate body or high commission, syndicate (who has an ABN), local government jurisdiction or a state, territory or commonwealth agency or any other type of non-person entity.

When you are an administrator for any of the above entities, you can invite a person to act on behalf of that entity (“a **representative**”), either as another administrator (“**service administrator**”) or as a standard user (“**service user**”).

If you are not an administrator and require administrator rights, you should [submit a request](#) and wait until your request is approved. Please be aware that you may be asked to provide proof that you are allowed to act on behalf of the requested business

If you require another person act on behalf of yourself, please refer to the instructions titled, “Inviting a person to act on your behalf”.

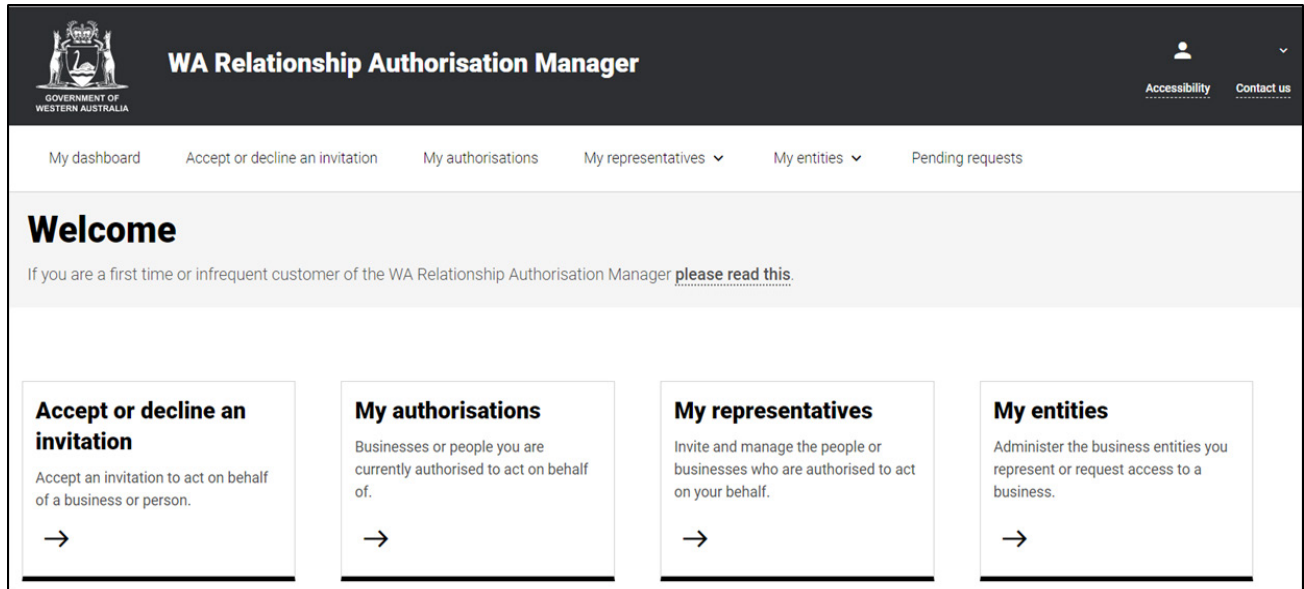
The person you are inviting to be a representative will be emailed an invitation with a code, of which they have 14 days to sign in and enter the code to accept the invitation.

Before starting, ensure you have the given name(s), family name and email address associated with the person you are inviting. The name you supply on the invitation must exactly match the name they have recorded against their account.

# STEP 1.

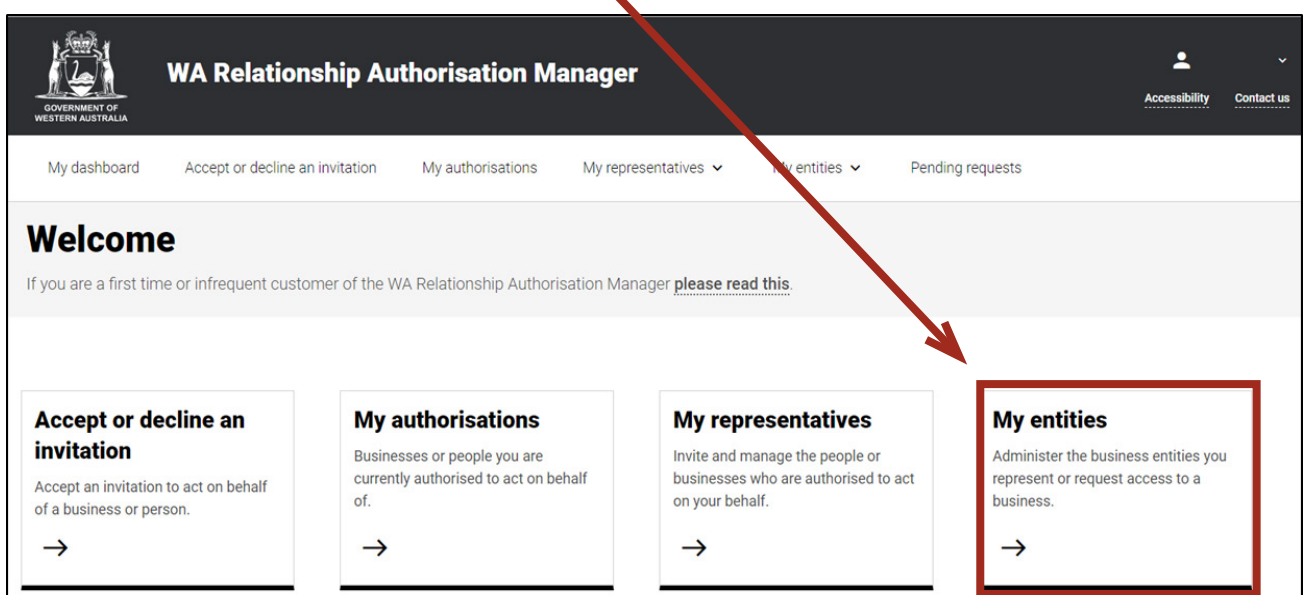
## How to invite another person to act on behalf of an entity

Sign into the [WARAM](#). This will automatically start you at the “My dashboard” / “Welcome” page.



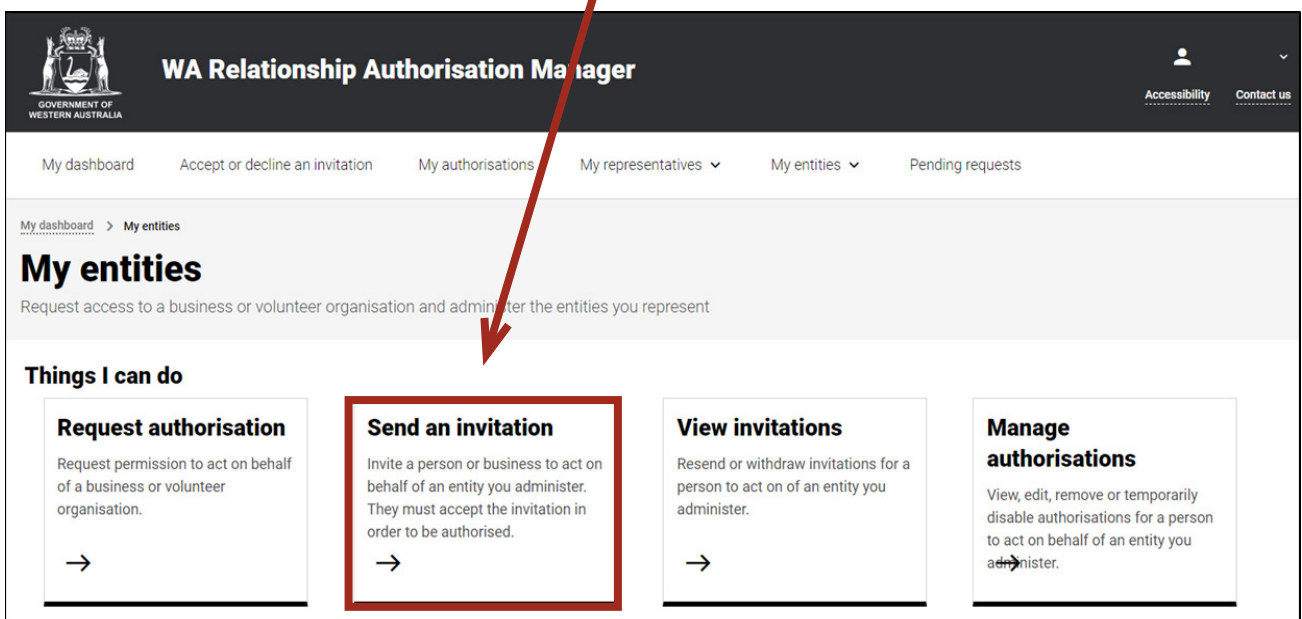
# STEP 2.

Click on the “My entities” section tab.



# STEP 3.

Click on the “Send an invitation” section tab.



**NOTE:** If the “Send an invitation” section tab is not visible on this page, then you have not been authorised to administer any entities. If you require administrator rights, you will need to [submit a request](#) and wait until the request is approved.

# STEP 4.

You should now be able to see the “Send an invitation” page. First select the entity you are inviting the person to represent.

In the box displayed, enter a part of entity’s name, or their Australian Business Number (ABN) or their Australian Company Number (ACN) or their Incorporated Association Reference Number (IARN), of that entity you wish to search for.

**NOTE:** An IARN is the unique identifier assigned to an entity in WA Associations Online.

The list of entities will be restricted to those entities you are authorised to administer. You can click in the box to view a list of those entities.

# STEP 4. cont...

WA Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests 10

My dashboard > My entities > Send an invitation

## Send an invitation

1 Select an entity | 2 Enter representative details | 3 Enter authorisation details | 4 Send invitation

Search for an entity you administer using either a name, ABN, ACN or IARN

Cancel Next

As you enter the entity's name, options will be displayed directly below the box:

WA Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests 10

My dashboard > My entities > Send an invitation

## Send an invitation

1 Select an entity | 2 Enter representative details | 3 Enter authorisation details | 4 Send invitation

Search for an entity you administer using either a name, ABN, ACN or IARN

DEP. (ABN: )

Cancel Next

From the displayed list, select the correct entity you are searching for. It will then be displayed below the search box. If you have selected the wrong entity, either search again and select the correct entity or click on the “Remove” hyperlink found on the right of the “Other names”.

# STEP 4. cont...

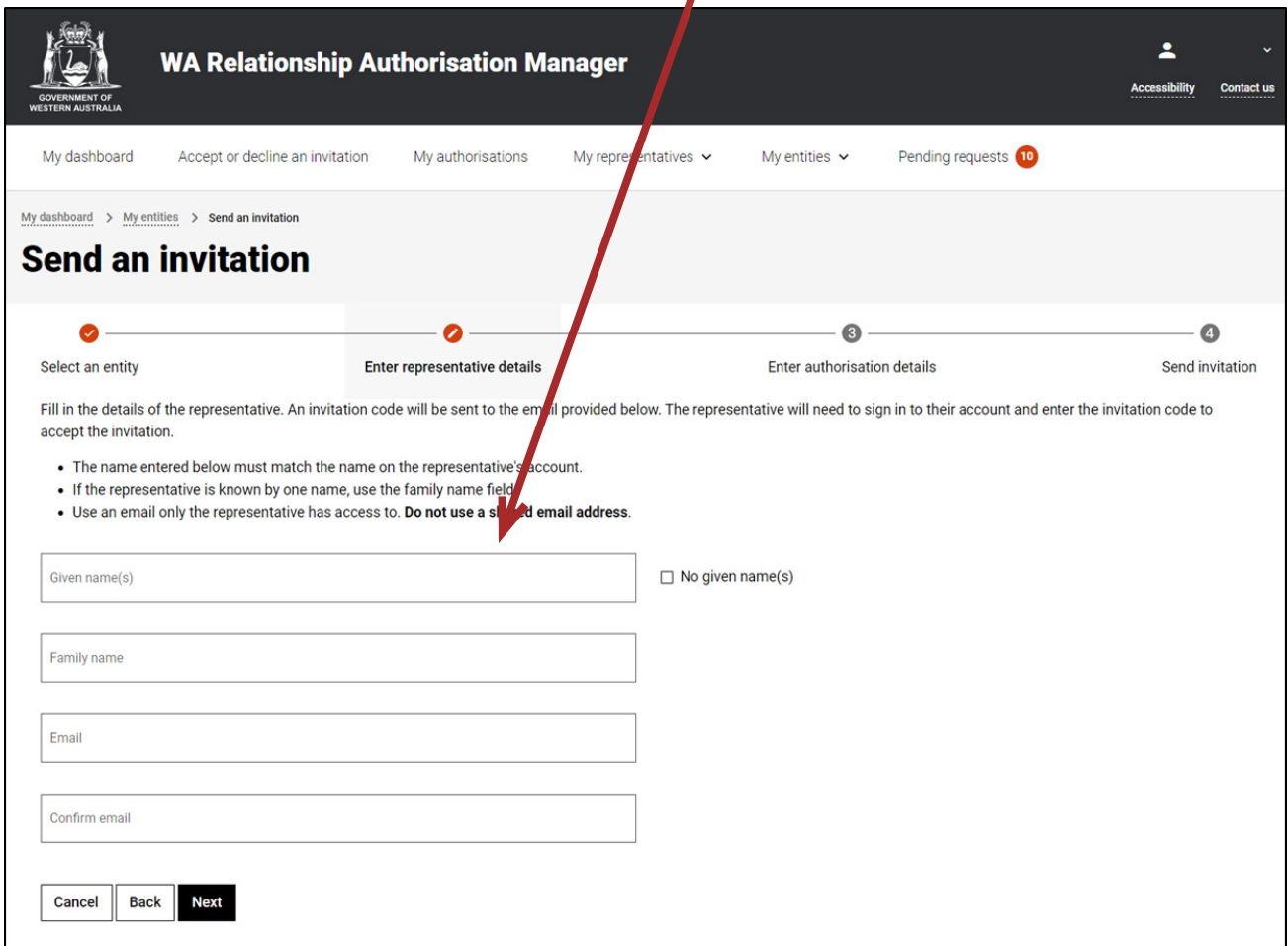
The screenshot shows the 'Send an invitation' page in the WA Relationship Authorisation Manager. The page has a dark header with the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. Below the header is a navigation bar with links: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests' (with a red badge '10'). The main content area has a breadcrumb trail: 'My dashboard > My entities > Send an invitation'. The title 'Send an invitation' is prominently displayed. Below the title is a progress indicator with four steps: 1. Select an entity (active), 2. Enter representative details, 3. Enter authorisation details, and 4. Send invitation. A search bar is present with the text 'Search for an entity you administer using either a name, ABN, ACN or IARN'. The search bar contains 'DEP' and has a red arrow pointing to it. Below the search bar is a table with two columns: 'Current legal name' and 'Other names'. The 'Current legal name' column contains 'DEP'. Below the table are 'ABN' and 'Remove' fields. At the bottom left, there are 'Cancel' and 'Next' buttons.

If your chosen entity is correct, click on the “Next” button, located to the bottom left of the page.

This screenshot is identical to the one above, showing the 'Send an invitation' page. However, a red arrow points from the top of the page down to the 'Next' button at the bottom left, which is highlighted with a red box.

# STEP 5.

Next, read the instructions and then fill out the representative details as requested on this page.



**WA Relationship Authorisation Manager**

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests **10**

My dashboard > My entities > Send an invitation

## Send an invitation

1 Select an entity | 2 Enter representative details | 3 Enter authorisation details | 4 Send invitation

Fill in the details of the representative. An invitation code will be sent to the email provided below. The representative will need to sign in to their account and enter the invitation code to accept the invitation.

- The name entered below must match the name on the representative's account.
- If the representative is known by one name, use the family name field.
- Use an email only the representative has access to. **Do not use a shared email address.**

Given name(s)   No given name(s)

Family name

Email

Confirm email

# STEP 5. cont...

Once you have filled out the representative details, click on the “Next” button, located at the bottom of the page to the left side.

The screenshot shows the 'WA Relationship Authorisation Manager' interface. At the top left is the Government of Western Australia logo. The main header is 'WA Relationship Authorisation Manager'. On the right, there are links for 'Accessibility' and 'Contact us'. Below the header is a navigation bar with 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests' (with a notification badge of 10). The breadcrumb trail is 'My dashboard > My entities > Send an invitation'. The main heading is 'Send an invitation'. Below this is a progress indicator with four steps: 1. Select an entity (checked), 2. Enter representative details (checked), 3. Enter authorisation details, and 4. Send invitation. The current step is 'Enter representative details'. The instructions state: 'Fill in the details of the representative. An invitation code will be sent to the email provided below. The representative will need to sign in to their account and enter the invitation code to accept the invitation.' There are three bullet points: 'The name entered below must match the name on the representative's account.', 'If the representative is known by one name, use the family name field.', and 'Use an email only the representative has access to. Do not use a shared email address.' The form fields are: 'Given name(s)' (with a checkbox for 'No given name(s)'), 'Family name', 'Email', and 'Confirm email'. At the bottom left are three buttons: 'Cancel', 'Back', and 'Next'. A red arrow points from the top right of the page to the 'Next' button.

# STEP 6.

Next enter the authorisation details for the invitation.

The screenshot shows the 'Send an invitation' page in the WA Relationship Authorisation Manager. The page has a dark header with the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. Below the header is a navigation bar with links: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests' (with a red badge showing '10'). The main content area has a breadcrumb trail: 'My dashboard > My entities > Send an invitation'. The title 'Send an invitation' is prominently displayed. Below the title is a progress indicator with four steps: 'Select an entity', 'Enter representative details', 'Enter authorisation details' (which is highlighted in grey and has a red checkmark), and 'Send invitation' (with a '4' in a circle). The main form area contains the following elements: a heading 'Select a service and an authorisation type that applies to it.', two dropdown menus labeled 'Service' and 'Authorisation type', a section titled 'What is an authorisation type?' with a right-pointing arrow, a 'Start date' field with a calendar icon, an 'End date' field with a calendar icon and a checkbox labeled 'No end date', and three buttons at the bottom: 'Cancel', 'Back', and 'Next'.

Enter the required details into the boxes on the page for:

- Service: The online service the representative will be accessing on behalf of the business.
- Authorisation type: If the representative is allowed to manage the entity's authorisations in the WARAM, select "Service Administrator", otherwise select "Service User".
- Start date: The date you want the authorisation to start at. This can also be a future date. If unsure, please supply today's date.
- End date: The date you want the authorisation to end. Supply an end date if there is a fixed term to the authorisation. You can select "No end date" if relevant e.g. for an employee or other consultant.



# STEP 6. cont...

**WA Relationship Authorisation Manager**

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests

My dashboard > My entities > Send an invitation

## Send an invitation

Progress: 1. Select an entity (✓) | 2. Enter representative details (✓) | 3. Enter authorisation details (✓) | 4. Send invitation (4)

Select a service and an authorisation type that applies to it.

Service: Geophysical Survey Index (MAGIX)

Authorisation type: Service User

What is an authorisation type?

Start date: 04 Jul 2022

End date:  No end date

Buttons: Cancel | Back | Next

Click on the “Next” button located to the bottom left of the page.

**WA Relationship Authorisation Manager**

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests

My dashboard > My entities > Send an invitation

## Send an invitation

Progress: 1. Select an entity (✓) | 2. Enter representative details (✓) | 3. Enter authorisation details (✓) | 4. Send invitation (4)

Select a service and an authorisation type that applies to it.

Service: Geophysical Survey Index (MAGIX)

Authorisation type: Service User

What is an authorisation type?

Start date: 04 Jul 2022

End date:  No end date

Buttons: Cancel | Back | Next

# STEP 7.

The final step prior to sending an invitation is to confirm the details of the invitation and complete the declaration.

Read and review your invitation details located in the charcoal coloured information box titled, "Review and confirm invitation details".

The screenshot shows the 'WA Relationship Authorisation Manager' interface. At the top, there is a navigation bar with the logo and title 'WA Relationship Authorisation Manager'. Below this is a breadcrumb trail: 'My dashboard > My entities > Send an invitation'. The main heading is 'Send an invitation'. A progress bar shows four steps: 'Select an entity', 'Enter representative details', 'Enter authorisation details', and 'Send invitation'. The 'Send invitation' step is highlighted in grey. Below the progress bar is the 'Review and confirm invitation details' section, which is a charcoal-colored box. It contains two tables. The first table has columns for 'Entity' and 'Representative'. The second table has columns for 'Authorisation details'. Below the tables is a message box with an information icon and text: 'An invitation code will be sent to . at @ . The representative will need to sign in to their account and enter the invitation code to accept the invitation.' Below this is the 'Declaration' section with the heading 'I declare that:' and a list of bullet points. At the bottom, there is a checkbox 'I understand and accept this declaration' and three buttons: 'Cancel', 'Back', and 'Send'.

**Entity**

Current legal name	ACN
Other names associated with the entity	

**Representative**

Name	Email
	@

**Authorisation details**

Service	Authorisation type	Start date	End date
	Service Administrator	08 November 2022	None

An invitation code will be sent to . at @ . The representative will need to sign in to their account and enter the invitation code to accept the invitation.

### Declaration

**I declare that:**

- I have used my own account to access this service.
- I am creating a relationship between the entity and the representative named above.
- I am authorised to create this relationship on behalf of the entity named above.
- I understand that by creating this relationship:
  - the representative named above will be authorised to transact on behalf of the entity named above with the service I have selected.
  - all decisions and actions undertaken by the representative named above with regards to the service named above will be treated as approved by the entity.
  - the entity named above will **not** be notified when the representative whom I have authorised chooses to transact on behalf of the entity with the service named above.
  - the representative's name and email address may be shared with the service named above.
- I have reviewed the invitation details and these correctly reflect my intent.
- I understand that by creating this relationship:
  - the representative named above will be able to authorise other representatives to transact on behalf of the entity named above with the service named above.
  - I will **not** be notified when the representative named above authorises other representatives to transact on behalf of the entity named above with the service named above.

I understand and accept this declaration

## STEP 7. cont...

If you agree with the Declaration, click the checkbox titled “I understand and accept this declaration”, located near the bottom of the page underneath the “I declare that”.

Next, click on the “Send” button.

**NOTE:** At this stage in the process you also have several other choices available:

- Should you not agree with the declaration, click on the “Cancel” button and go to Step 9.
- If any of details on this page are incorrect, click on the “Back” button located at the bottom of the page, to navigate back to the page (or pages) required to amend any errors or make changes.
- Should you wish to cancel this invitation and start again, click on the “Cancel” button located at the bottom of the page and go to Step 9.

# STEP 7. cont...

**WA Relationship Authorisation Manager**

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests | Event history

My dashboard > My entities > Send an invitation

## Send an invitation

Progress: Select an entity (✓) | Enter representative details (✓) | Enter authorisation details (✓) | Send invitation (✓)

### Review and confirm invitation details

Entity		Representative	
Current legal name	ACN	Name	Email
Other names associated with the entity			
Authorisation details			
Service	Authorisation type	Start date	End date
	Service Administrator	08 November 2022	None

An invitation code will be sent to [redacted] at [redacted]@[redacted]. The representative will need to sign in to their account and enter the invitation code to accept the invitation.

### Declaration

**I declare that:**

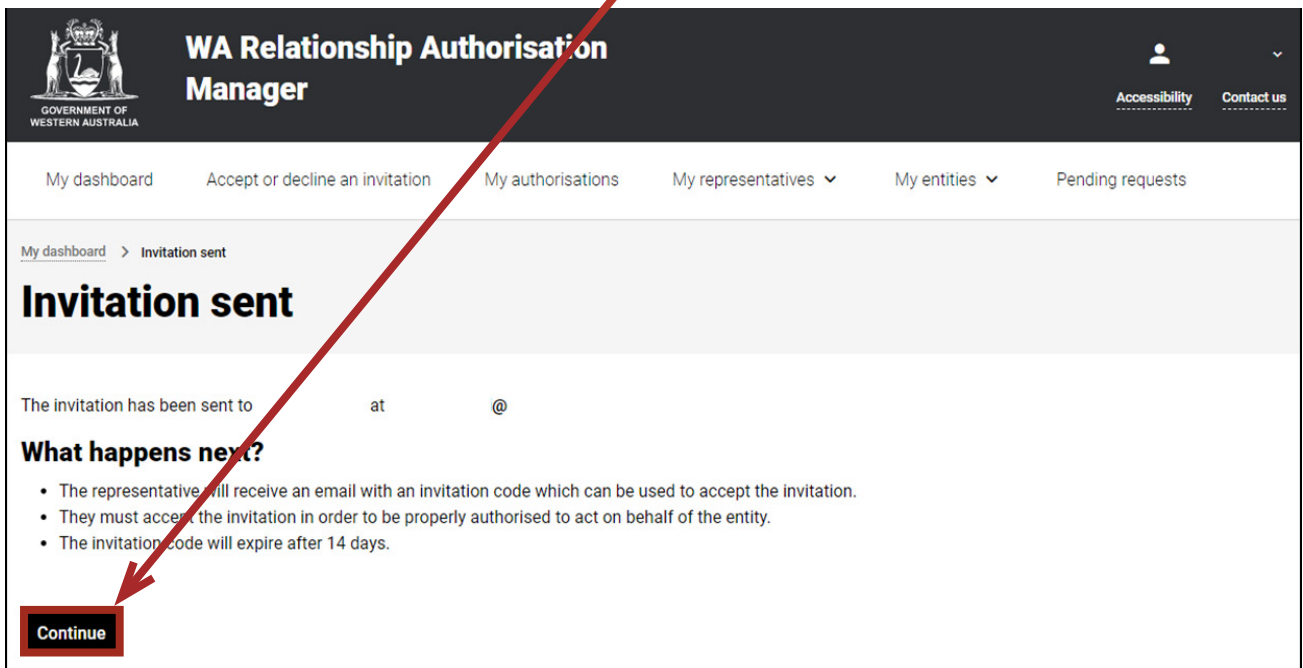
- I have used my own account to access this service.
- I am creating a relationship between the entity and the representative named above.
- I am authorised to create this relationship on behalf of the entity named above.
- I understand that by creating this relationship:
  - the representative named above will be authorised to transact on behalf of the entity named above with the service I have selected.
  - all decisions and actions undertaken by the representative named above with regards to the service named above will be treated as approved by the entity.
  - the entity named above will **not** be notified when the representative whom I have authorised chooses to transact on behalf of the entity with the service named above.
  - the representative's name and email address may be shared with the service named above.
- I have reviewed the invitation details and these correctly reflect my intent.
- I understand that by creating this relationship:
  - the representative named above will be able to authorise other representatives to transact on behalf of the entity named above with the service named above.
  - I will **not** be notified when the representative named above authorises other representatives to transact on behalf of the entity named above with the service named above.

I understand and accept this declaration

Cancel | Back | **Send**

# STEP 8.

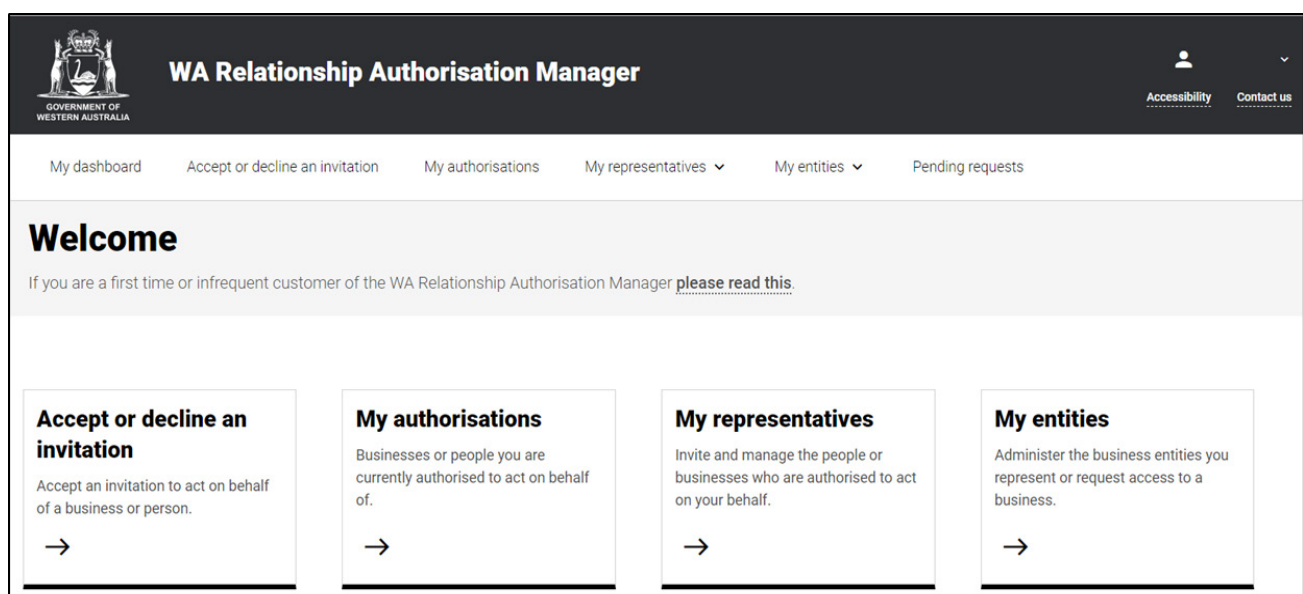
If you have selected the “Send” button, you should now be able to see the “Invitation sent” page, confirming that your invitation has been sent. Next, click on the “Continue” button, located at the bottom of the page.



**NOTE:** As described under the heading “What happens next” on the “Invitation sent” page, your nominated representative will be sent an email invitation code for accepting the invitation. Once accepted, the representative may act on behalf of the nominated entity. This invitation code will expire after 14 days.

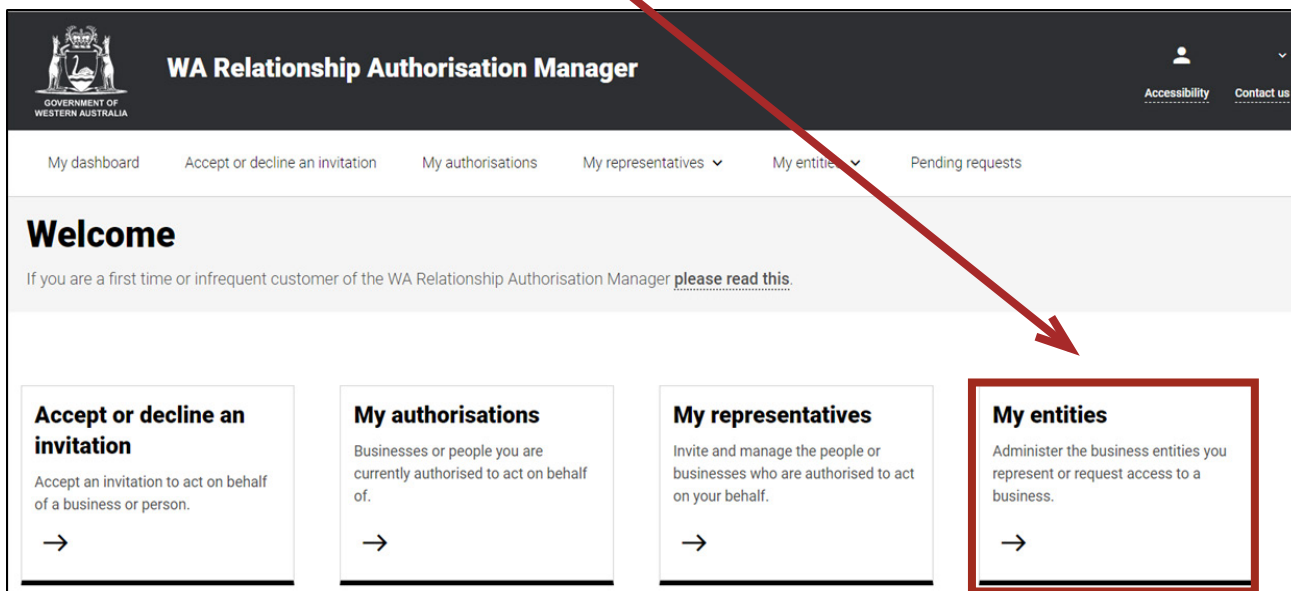
# STEP 9.

You should now be returned to the “My dashboard” / “Welcome” page.

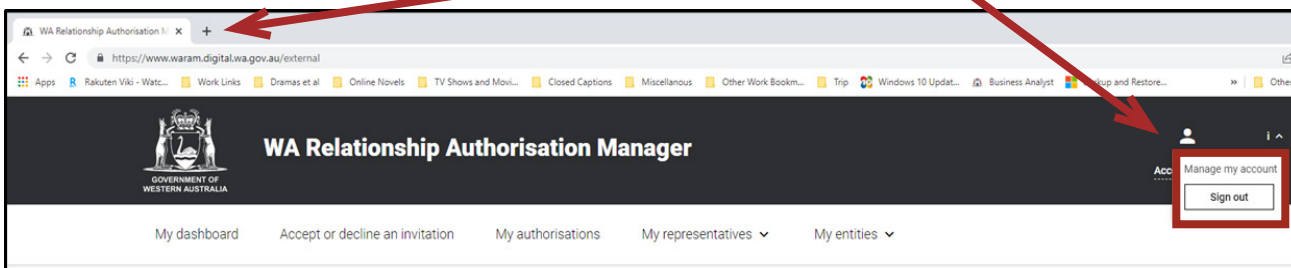


# STEP 9. cont...

**NOTE:** The invitation will be visible from the “View invitations” section tab which can be found under the “My entities” dropdown menu item or section tab on the “My dashboard” / “Welcome” page. From this area, you can view details of previously sent invitations, resend an invitation or withdraw an invitation.



You can sign out by selecting your name at the top of the page and clicking on the “Sign out” button or close the service via the x in the top of the browser.



This completes the step-by-step instructions.

## Need further assistance?

Contact the [government agency which supports the service](#) you are trying to access. Contact details are available by using either:

1. the “Contact us” link found in the WARAM header; and
2. the “Need assistance?” section in the WARAM footer.