Natural Resource Online Services Agent Access Management

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1. NR Online Services Set up for Client Managers and Client Representatives

NR Online Services will allow the client to delegate another person to act on their behalf. All representatives must have either a Personal or Business BCeID to log into the NR Online Services system.

It is important to understand the representative type, responsibility and liability. The client account holder must act with due diligence when inviting representatives.

There are currently two representation types available:

- **Client Manager:**
  - has the same access as the owner of the account and can add and change access to any users under the account
  - can access all applications that are supplied for the client
- **Client Representative**:
  - has no ability to invite others
  - can only access applications that they created

Note: The Client Manager role has global access and may add or change any other client managers or client representatives that are acting on behalf of the company.

1.1. Setting Up Representatives

There are three main steps for inviting someone to act on the client's behalf:

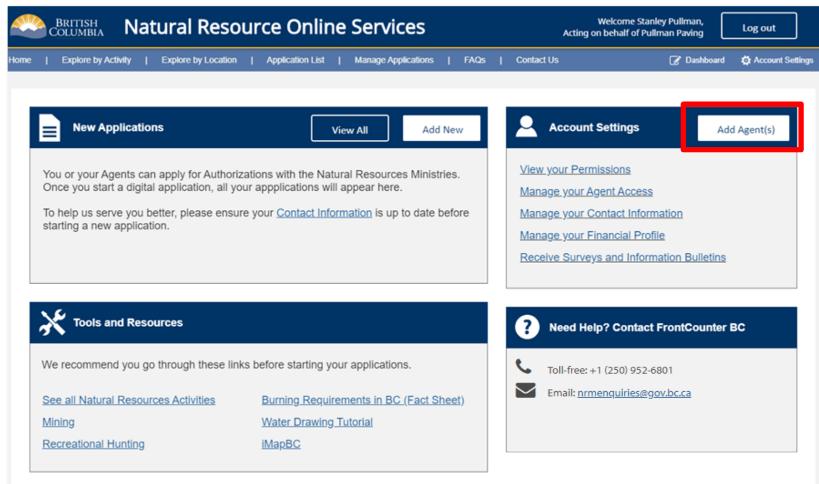
1. The client logs into their NR Online Services account and navigates to the Manage Representative page
2. The client determines how the invitation(s) will be sent. There are two options:
   - Auto Approved Invitations – this option allows the client to send the invitation to the invitee(s) and the invitee(s) is/are immediately allowed access to the account when they accept it.
   - Approval Required Invitations– this option allows the client to send the invitation to the invitee(s) but requires the client to approve the invitation after the invitee(s) accepts it.
3. Monitor the invitations that have been sent

Note: It is the responsibility of the client to manage their Client Representatives and Managers, which includes not only initiating and processing invitations, but also managing authorizations including effective and expiry dates and disabling.

1.1.1. Sending an Invitation

Log onto **NR Online Services** with a **BCeID**.

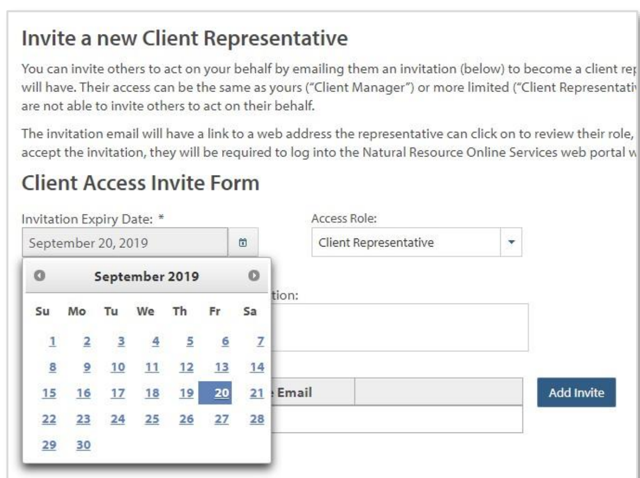
On the Dashboard, click the **Add Agent(s)** link in the **Account Settings** panel.



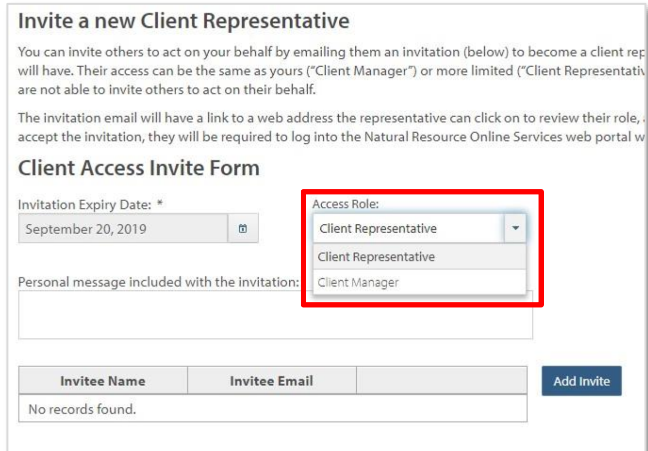
The **Invite a new Client Representative** page will show.

Determine the **Expiry Date** of the invitation.

The Expiry Date will default to 60 days, but can be changed using the calendar option.

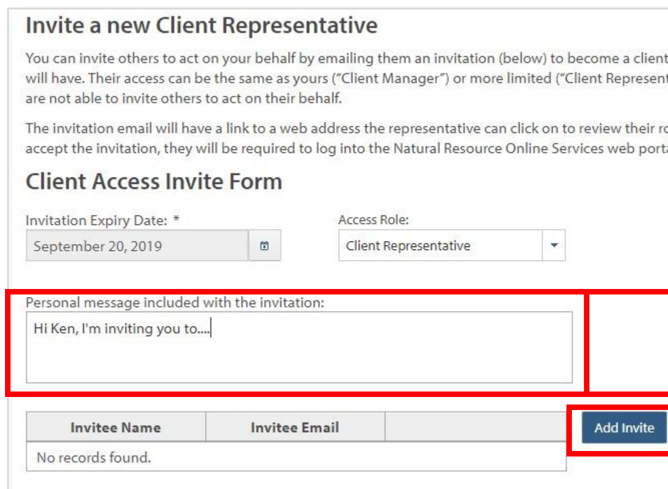


Select the invitees' **Access Role** from the drop down list.



Enter a **personal message** if desired.

Click the **Add Invite** button.

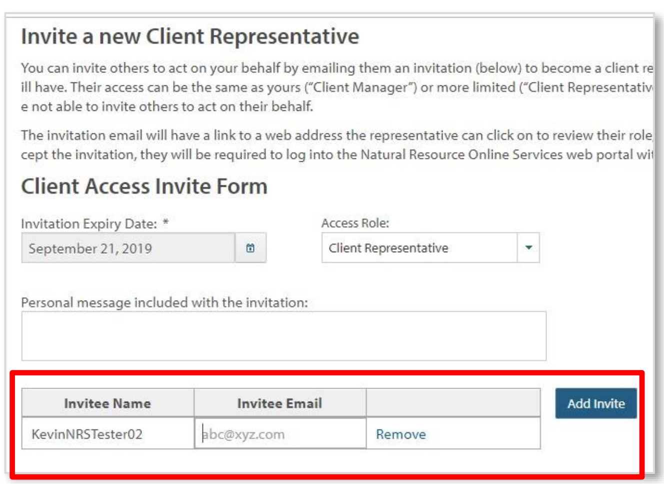


Once the **Add Invite** button is pressed, a row will appear under the **Invitee Name** and **Invitee Email** columns.

Enter the invitee's **name** and **email** address.

To add more invitees, continue to click the **Add Invite** button to add rows.

Use the **Remove** link to remove an invitee.

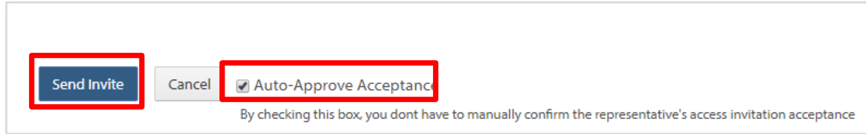


See below for the two options for sending the invitation**: Auto Approved** and **Approval Required.**

1.1.2. Auto Approved Invitation (Auto Approved Acceptance Button Selected)

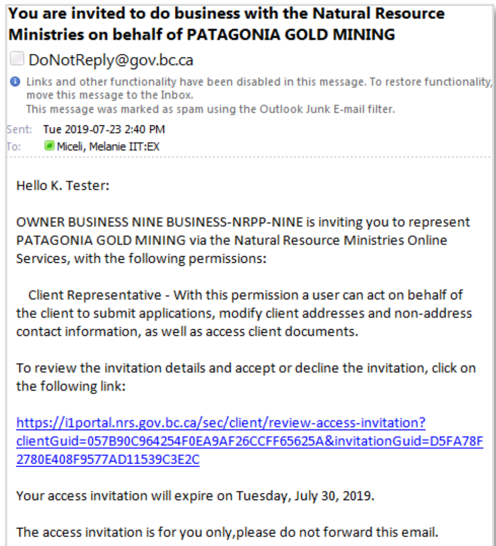
The '**Auto Approve Acceptance**' checkbox is selected by default.

Click **Send Invite**.

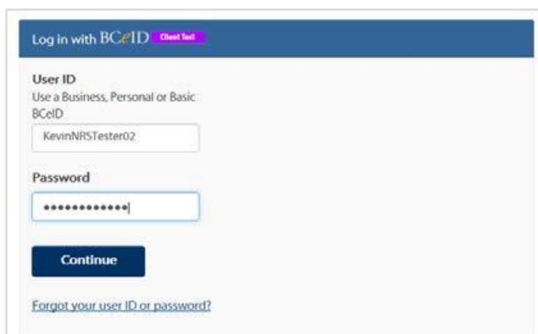


The invitee(s) will receive an email from the system, notifying them of the invitation.

They will need to click the link in the email.



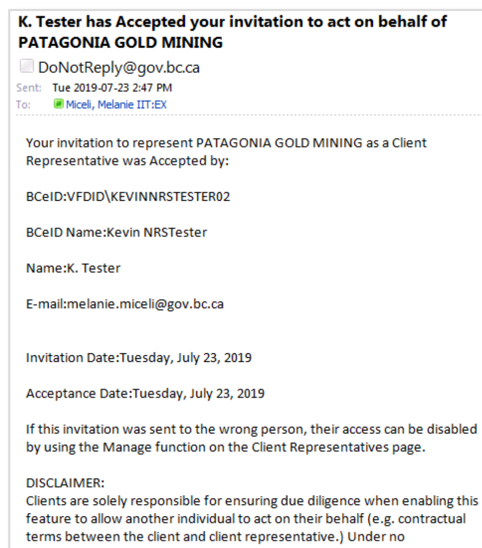
When the invitee(s) clicks on the link they will be required to Log In with their BCeID.



On the invitation page, the invitee(s) will either **Accept** or **Decline** the invitation.

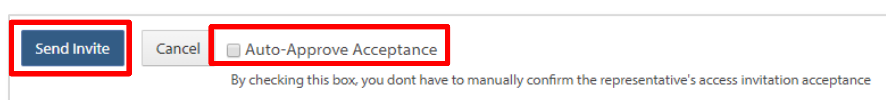
The client will receive an email notifying them when the invitee(s) accepts or declines the invitation.

If the invitee(s) accepts the invitation, they can now do work on behalf of the client.



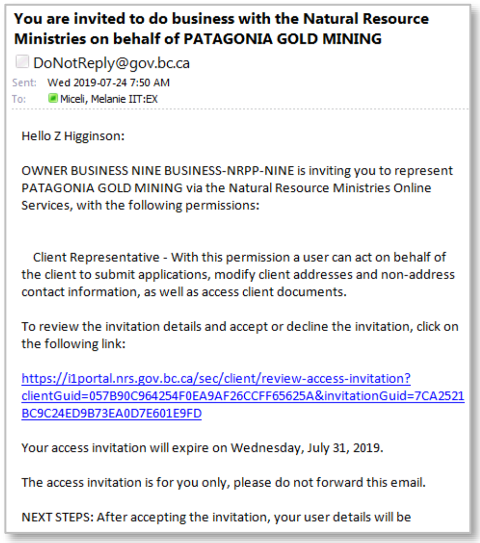
1.1.3. Approval Required Invitations (Auto Approved Acceptance Button Not Selected)

The '**Auto Approve Acceptance**' checkbox is selected by default. Uncheck the box.

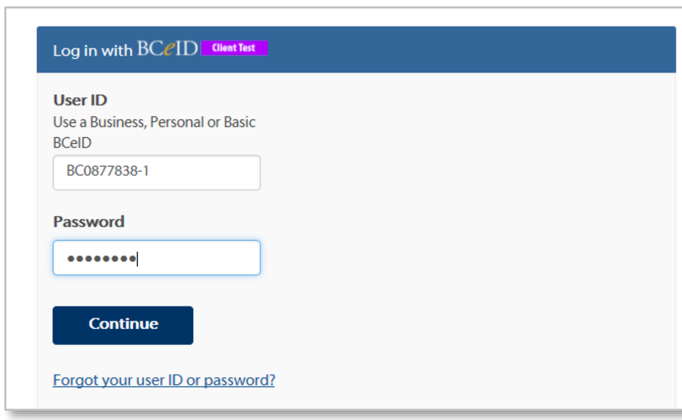


Click **Send Invite**.

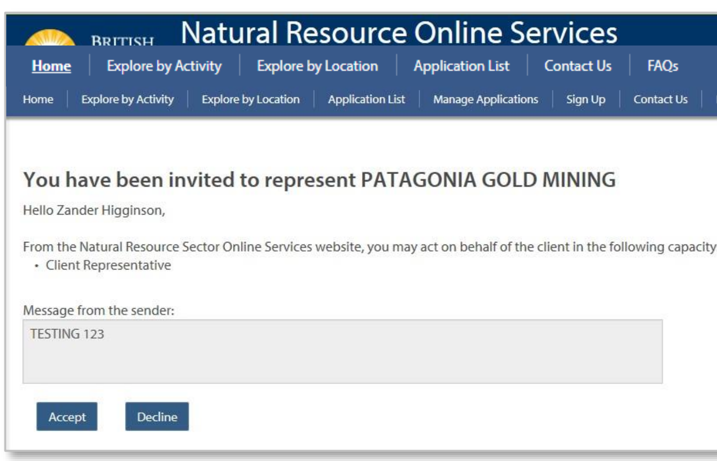
The invitee(s) will receive an email. They must click on the link in the email.



When the invitee(s) clicks on the link they will be required to **Log In** with their BCeID.

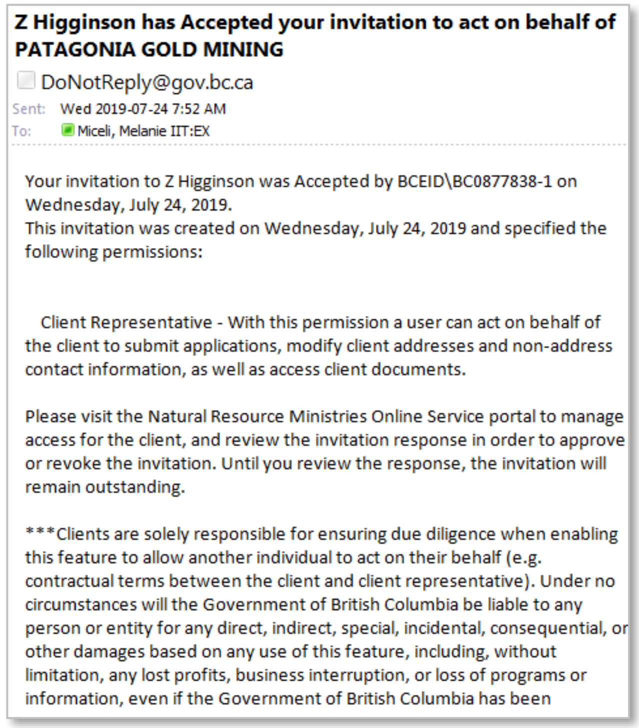


On the invitation landing page, the invitee(s) will click either **Accept** or **Decline**.



The invitee(s) will then see a message informing them they must wait until the invitation is approved by the sender.

The client will receive an email informing them of the invitee(s) acceptance, and to request they log into the portal and approve or revoke the invitation.


Z Higginson has Accepted your invitation to act on behalf of PATAGONIA GOLD MINING

DoNotReply@gov.bc.ca

Sent: Wed 2019-07-24 7:52 AM

To: Miceli, Melanie IIT:EX

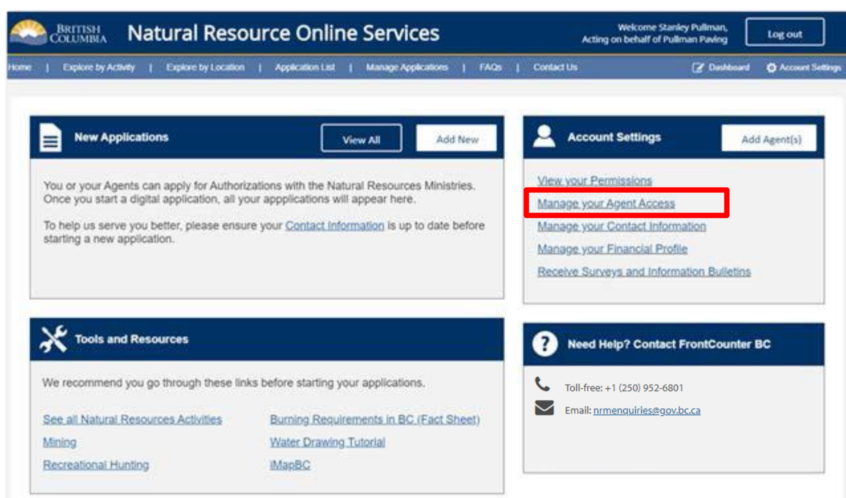
Your invitation to Z Higginson was Accepted by BCEID\BC0877838-1 on Wednesday, July 24, 2019.
This invitation was created on Wednesday, July 24, 2019 and specified the following permissions:

Client Representative - With this permission a user can act on behalf of the client to submit applications, modify client addresses and non-address contact information, as well as access client documents.

Please visit the Natural Resource Ministries Online Service portal to manage access for the client, and review the invitation response in order to approve or revoke the invitation. Until you review the response, the invitation will remain outstanding.

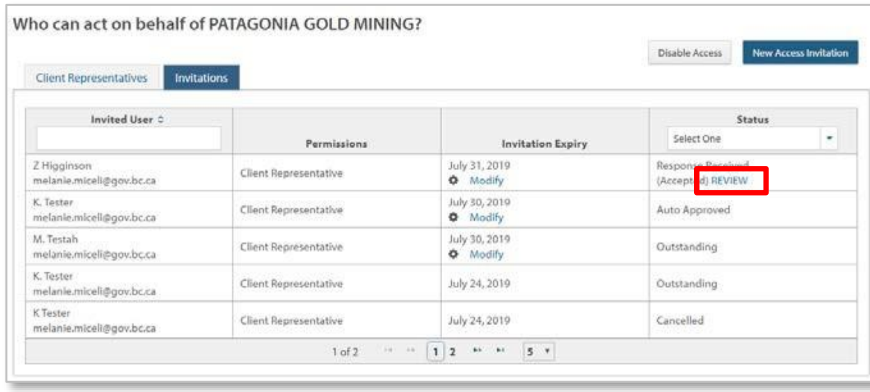
***Clients are solely responsible for ensuring due diligence when enabling this feature to allow another individual to act on their behalf (e.g. contractual terms between the client and client representative). Under no circumstances will the Government of British Columbia be liable to any person or entity for any direct, indirect, special, incidental, consequential, or other damages based on any use of this feature, including, without limitation, any lost profits, business interruption, or loss of programs or information, even if the Government of British Columbia has been

The client will log into the portal and click the **Manage your Agent Access** link in the **Account Settings** panel.

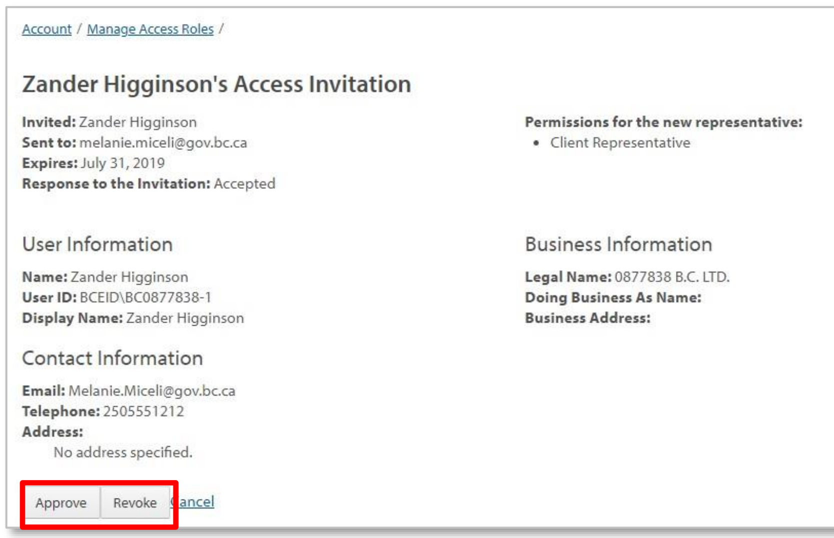


The client will see in the list of **Invited Users** that the invitation has been accepted and now needs to be reviewed.

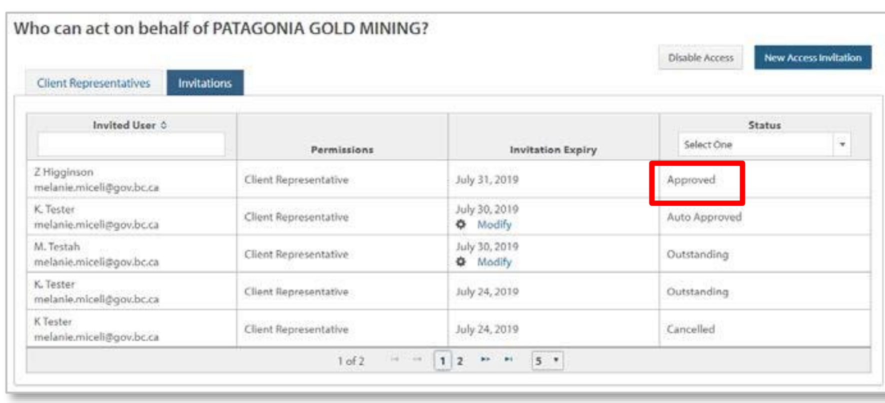
Click the **Review** link.



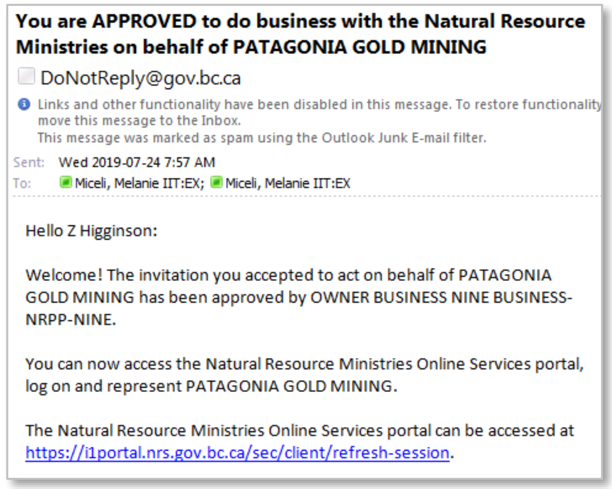
The client will review the identity of the invitee and either **Approve** or **Revoke** the invitation.



The client can then see the status of the invitee has changed to **Approved**.



The invitee(s) will receive an email notifying them of their status and if approved, can now do work on behalf of the client.


You are APPROVED to do business with the Natural Resource Ministries on behalf of PATAGONIA GOLD MINING

DoNotReply@gov.bc.ca

Links and other functionality have been disabled in this message. To restore functionality move this message to the Inbox.
This message was marked as spam using the Outlook Junk E-mail filter.

Sent: Wed 2019-07-24 7:57 AM
To: Miceli, Melanie IIT:EX; Miceli, Melanie IIT:EX

Hello Z Higginson:

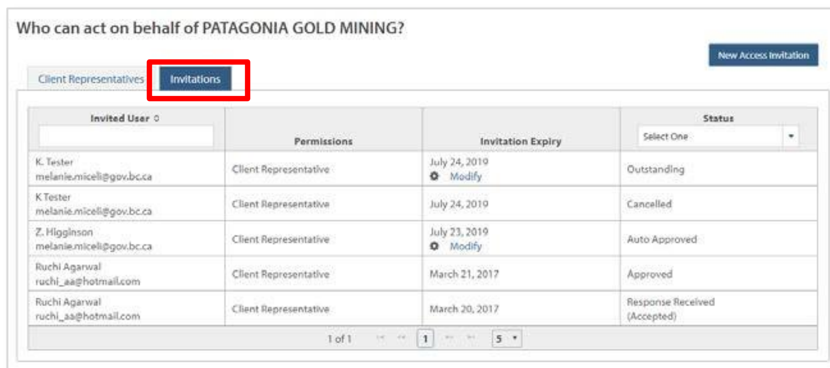
Welcome! The invitation you accepted to act on behalf of PATAGONIA GOLD MINING has been approved by OWNER BUSINESS NINE BUSINESS-NRPP-NINE.

You can now access the Natural Resource Ministries Online Services portal, log on and represent PATAGONIA GOLD MINING.

The Natural Resource Ministries Online Services portal can be accessed at https://i1portal.nrs.gov.bc.ca/sec/client/refresh-session.

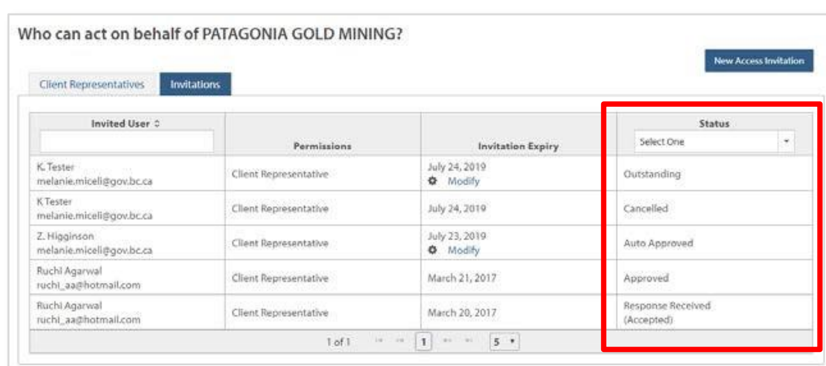
1.1.4. Monitoring Invitations

On the **Invitations** page, the invitee(s) will show in a list.



Under the **Invitations** tab, the client can check the status of the invitations that have been sent.

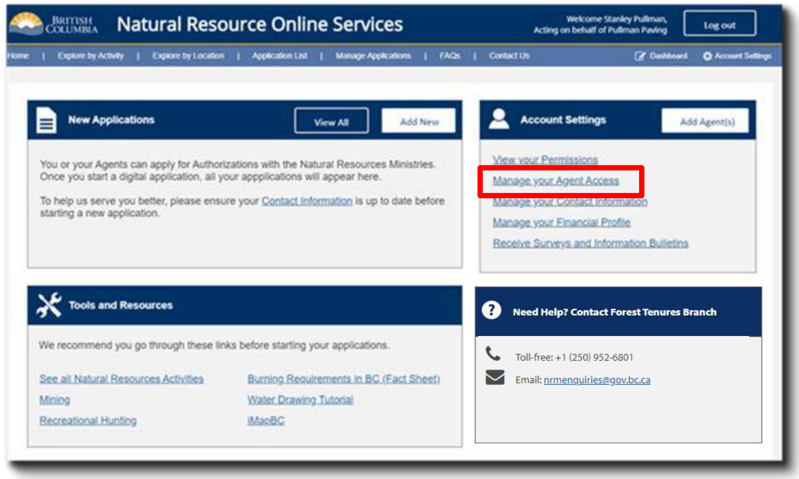
The **Status** column may show the following statuses:



- **Outstanding** if the invitation is waiting for the invitee(s) to Accept or Decline it.
- **Auto Approved** if the invitation was sent with the Auto Approve Acceptance check box selected and the invitee(s) has accepted the invitation.
- **Approval Pending** if the invitation was sent and requires the client to manually approve the invitation response. (The Review link will be active until the client reviews and accepts the invitation response).
- **Cancelled** if the client revokes the invitation.
- **Approved** when the client has approved an invitation that was sent with approval required.
- **Expired** if the invitee(s) did not accept or decline the invitation before the expiry date.

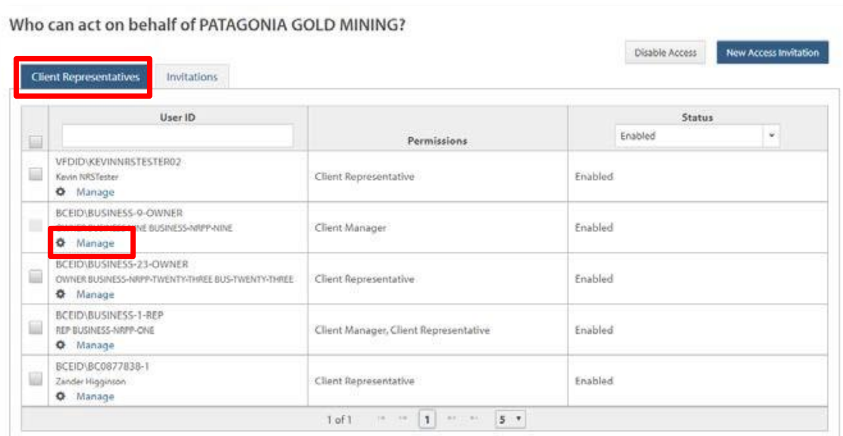
1.2. Managing Authorizations for Client Representatives

The client will log into the portal and click the **Manage your Agent Access** link in the **Account Settings** panel.



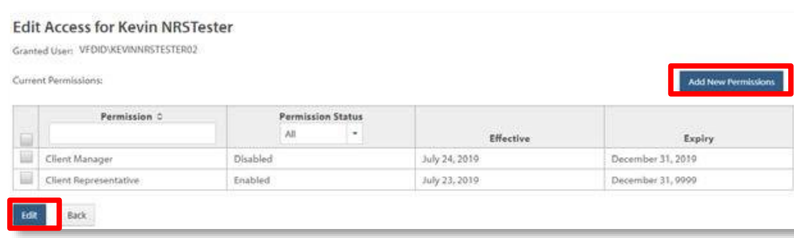
On the **Who can act on behalf of *Company Name*?** page the client will see a list of who can act on their behalf under the **Client Representatives** tab.

To manage one of their representatives, they will click the **Manage** link under their name.



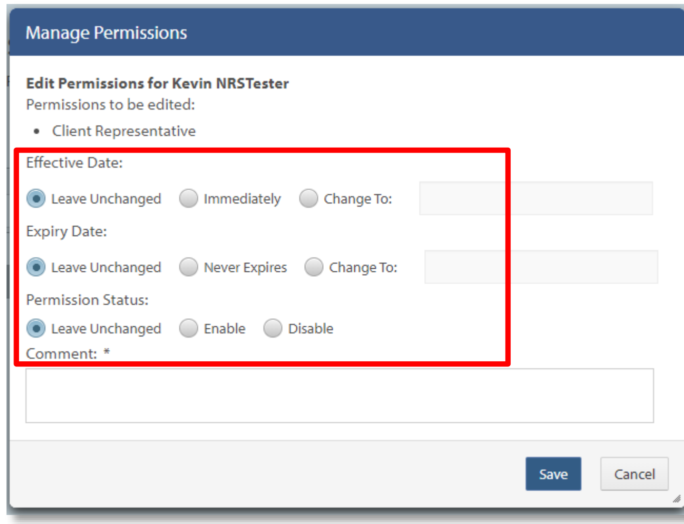
On the **Edit Access** page for the representative, the client can add a new permission by clicking the **Add New Permissions** button.

To edit the current permission, the client clicks the **Edit** button.



The **Edit Permission** pop up will appear.

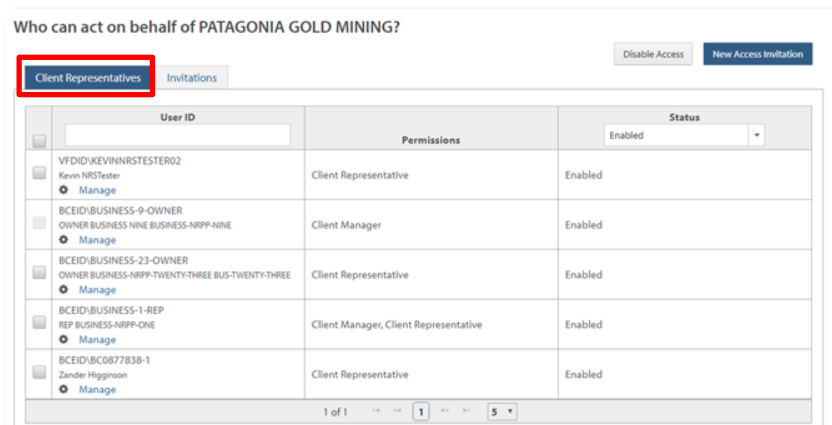
Here the client can change the effective date and/or expiry date of the permission, as well as the permission status.



1.3. Disable/Re-enabling Access for Approved Representatives

Once a representative has been approved, they will show under the **Client Representatives** tab.

Clients can disable and re-enable their access at any time.



Select the box beside the name of the agent to be disabled.

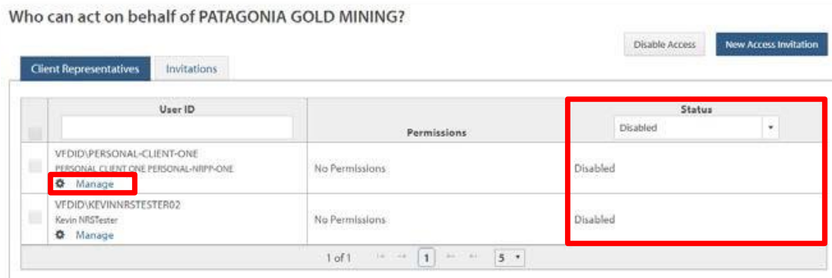
Click the **Disable Access** button.

The agent will not longer appear in the list of Client Representatives.

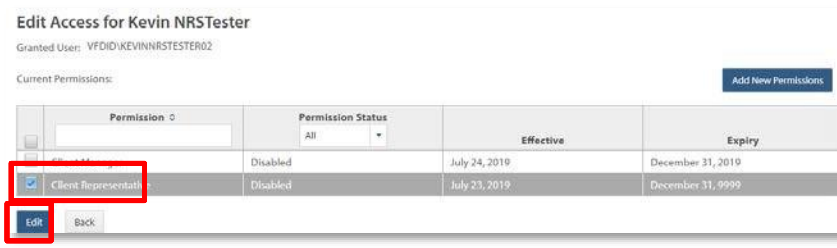
To re-enable the access, click the **Status Drop** down and select **Disabled**.

The list will show all of the agents who have been disabled.

Click the **Manage** link under the name of the agent to be re-enabled.



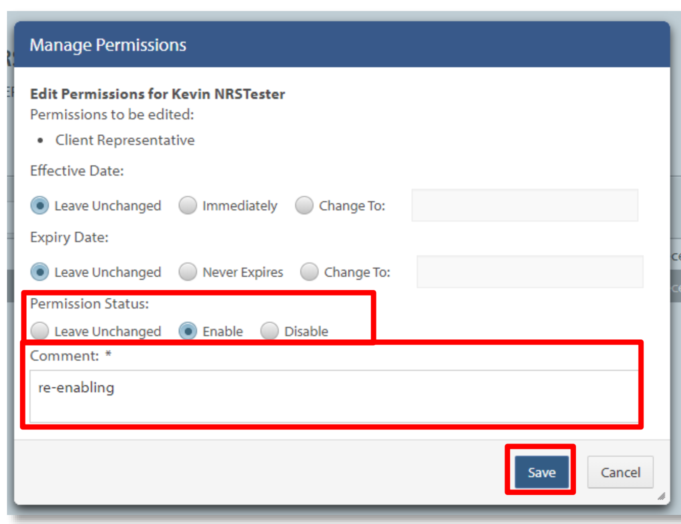
Select the **Permission** level for the agent and click **Edit**.



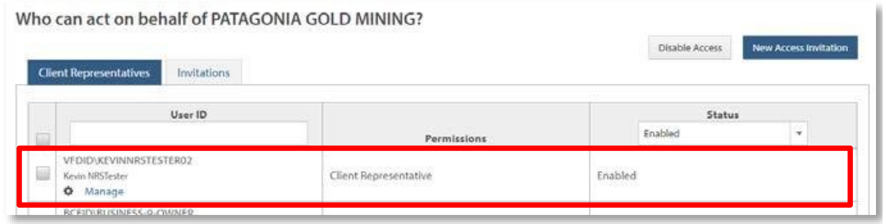
On the **Managing Permissions** pop up, select the **Enable** option.

Enter a **Comment** in the comment field.

Click **Save**.

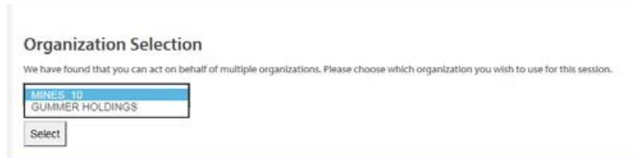


The agent will reappear under the **Client Representatives** tab as **Enabled**.



1.4. NR Online Services Representative that is "Authorized to Act" for Multiple Clients

If a Client Representative or Client Manager acts on behalf of multiple clients, it is important that the correct client is selected when a representative is performing NR Online Services work after the initial log in. When the representative first logs into NR Online Services, they will be presented with the "**Organization Selection**" option, where they will choose the correct client from the drop down.



Top right side of screen shows what client the representative is "Acting on behalf of".

Warning: Representatives must log out of the current browser session to change client representation as different organization.

2. Glossary

- BCeID
    - An online account that provides secure electronic access to participating online government services. . A BCeID consists of creating a username and password and allows you to save your application, reopen it and check the status of your application online.
- Client
    - An individual, business or organization that is doing natural resource business through NR Online Services.
- Registration
    - Refers to a client registering for a BCeID account .
- Natural Resource Online Services (NR Online Services)
    - A portal that allows clients to access natural resource sector data, business forms and applications for multiple business areas.
- Client Representative
    - Individuals given permission to act on behalf of a client in NR Online Services.
- Sign Up
    - Refers to the process a client goes through to sign up with NR Online Services.
- Smartform
    - Online forms a client or their representative must complete to submit an application for a natural resource activity.

3. Appendix I - Quick Links

Details	Links
Natural Resource Online Services (NR Online Services)	https://portal.nrs.gov.bc.ca/web/client/home
BCeID Registration	https://www.bceid.ca/
Business BCeID Account and Profiles Management Guide	https://www.bceid.ca/files/public/AccountProfileManagementGuide.pdf
BCeID Point of Service locations	https://www.bceid.ca/register/POS/default.aspx