



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

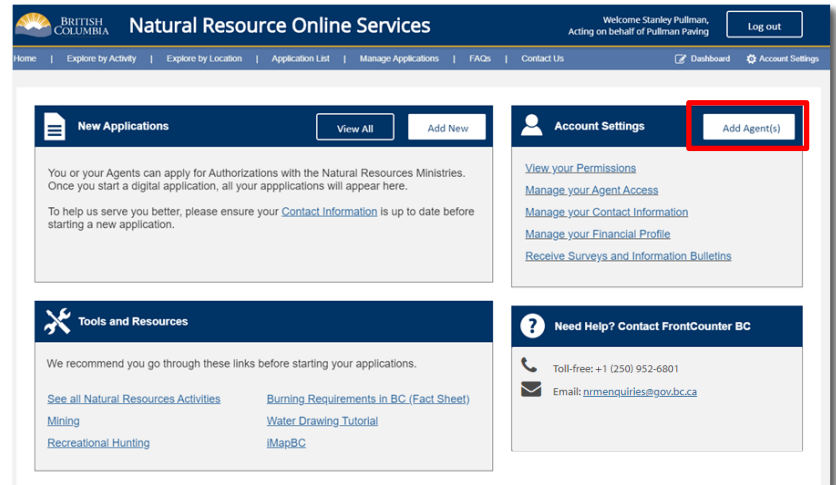
Note: It is the responsibility of the client to manage their Client Representatives and Managers, which includes not only initiating and processing invitations, but also managing authorizations including effective and expiry dates and disabling.

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.

The screenshot shows the 'Invite a new Client Representative' form. It includes a text area for an invitation message, a date picker for 'Invitation Expiry Date' (set to September 20, 2019), and a dropdown for 'Access Role' (set to 'Client Representative'). A calendar widget is open, showing the date selection process. The 'Add Invite' button is visible at the bottom right of the form.

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

Invite a new Client Representative

You can invite others to act on your behalf by emailing them an invitation (below) to become a client representative. Their access can be the same as yours ("Client Manager") or more limited ("Client Representative"). Client Representatives are not able to invite others to act on their behalf.

The invitation email will have a link to a web address the representative can click on to review their role. If they accept the invitation, they will be required to log into the Natural Resource Online Services web portal with their new credentials.

Client Access Invite Form

Invitation Expiry Date: *
September 20, 2019

Access Role:
Client Representative
Client Representative
Client Manager

Personal message included with the invitation:

Invitee Name	Invitee Email	
No records found.		

Add Invite

Enter a **personal message** if desired.

Invite a new Client Representative

You can invite others to act on your behalf by emailing them an invitation (below) to become a client representative. Their access can be the same as yours ("Client Manager") or more limited ("Client Representative"). Client Representatives are not able to invite others to act on their behalf.

The invitation email will have a link to a web address the representative can click on to review their role. If they accept the invitation, they will be required to log into the Natural Resource Online Services web portal with their new credentials.

Client Access Invite Form

Invitation Expiry Date: *
September 20, 2019

Access Role:
Client Representative

Personal message included with the invitation:
Hi Ken, I'm inviting you to...

Invitee Name	Invitee Email	
No records found.		

Add Invite

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.

Invite a new Client Representative

You can invite others to act on your behalf by emailing them an invitation (below) to become a client representative. Their access can be the same as yours ("Client Manager") or more limited ("Client Representative"). Client Representatives are not able to invite others to act on their behalf.

The invitation email will have a link to a web address the representative can click on to review their role. If they accept the invitation, they will be required to log into the Natural Resource Online Services web portal with their new credentials.

Client Access Invite Form

Invitation Expiry Date: *
September 21, 2019

Access Role:
Client Representative

Personal message included with the invitation:

Invitee Name	Invitee Email	
KevinNRSTester02	jbc@xyz.com	Remove

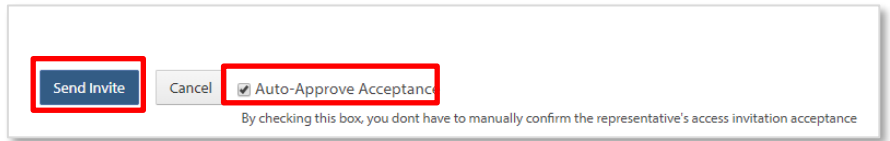
Add Invite

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**.

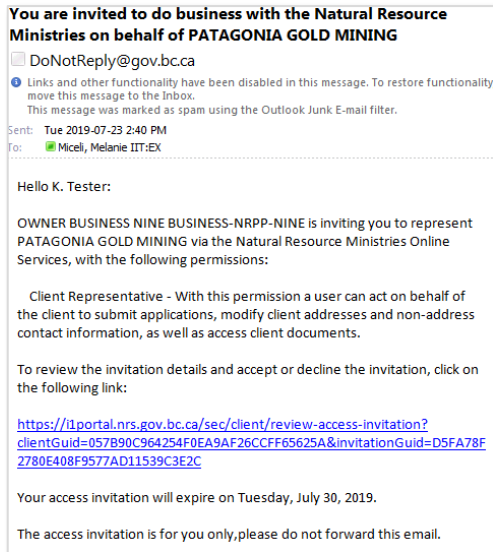


Send Invite Cancel ☒ Auto-Approve Acceptance

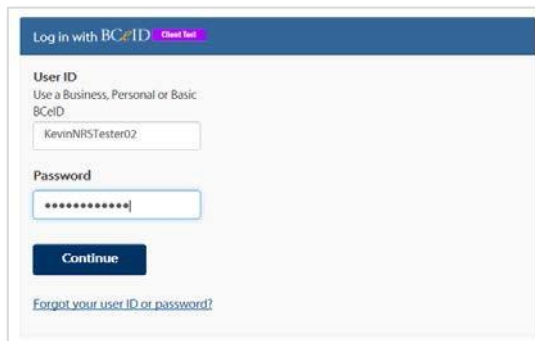
By checking this box, you dont have to manually confirm the representative's access invitation acceptance

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.



Log in with BCeID [Client Test](#)

User ID
Use a Business, Personal or Basic BCeID

Password

[Continue](#)

[Forgot your user ID or password?](#)

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.

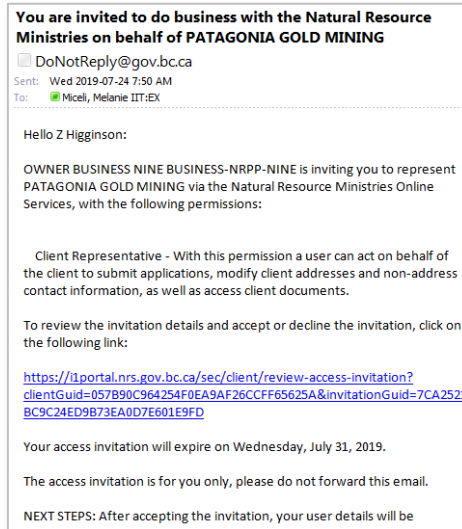
If the invitee(s) accepts the invitation, they can now do work on behalf of the client.

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.

Log in with BCeID [Client Test](#)

User ID
Use a Business, Personal or Basic BCeID

Password

[Continue](#)

[Forgot your user ID or password?](#)

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

Natural Resource Online Services

[Home](#) | [Explore by Activity](#) | [Explore by Location](#) | [Application List](#) | [Contact Us](#) | [FAQs](#)

[Home](#) | [Explore by Activity](#) | [Explore by Location](#) | [Application List](#) | [Manage Applications](#) | [Sign Up](#) | [Contact Us](#) | [Feedback](#)

You have been invited to represent PATAGONIA GOLD MINING

Hello Zander Higginson,

From the Natural Resource Sector Online Services website, you may act on behalf of the client in the following capacity:

- Client Representative

Message from the sender:

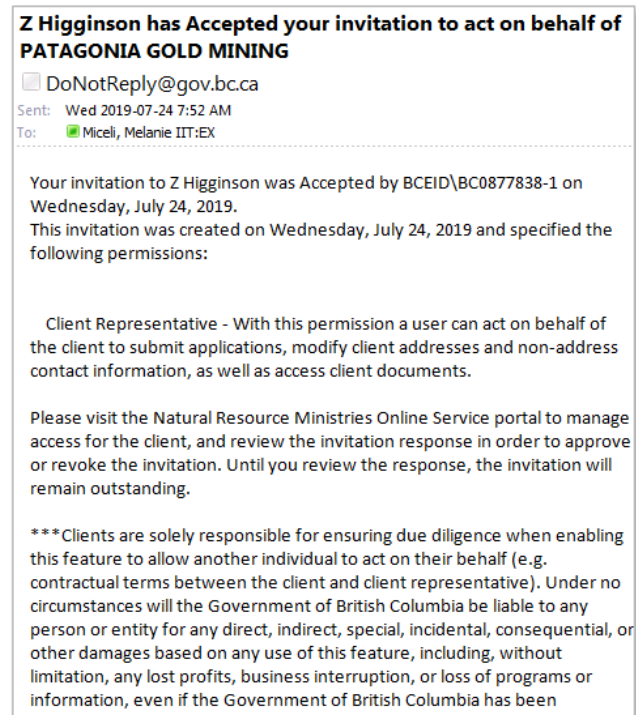
TESTING 123

[Accept](#) [Decline](#)

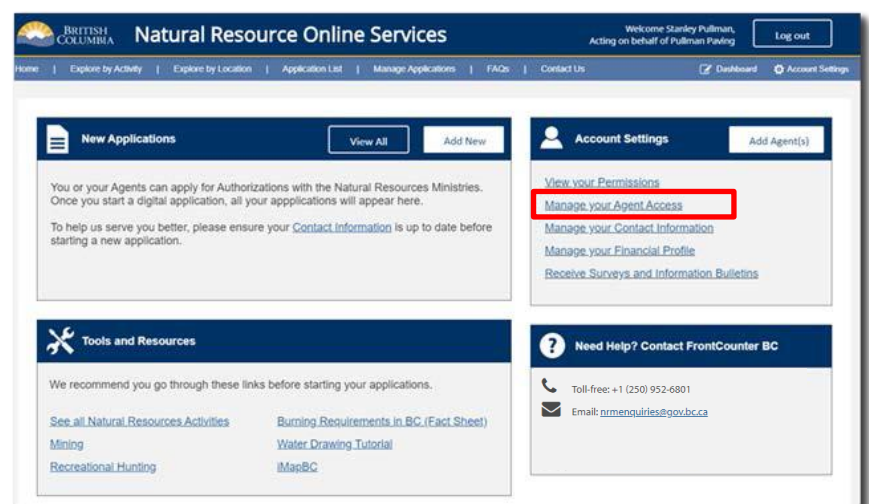
The invitee(s) will then see a message informing them they must wait until the invitation is approved by the sender.



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.



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.

Who can act on behalf of PATAGONIA GOLD MINING?

Disable Access New Access Invitation

Client Representatives Invitations

Invited User	Permissions	Invitation Expiry	Status
Z Higginson melanie.miceli@gov.bc.ca	Client Representative	July 31, 2019 Modify	Response Received (Accepted) REVIEW
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 30, 2019 Modify	Auto Approved
M. Testah melanie.miceli@gov.bc.ca	Client Representative	July 30, 2019 Modify	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Cancelled

1 of 2 1 2 5

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

Account / Manage Access Roles /

Zander Higginson's Access Invitation

Invited: Zander Higginson
Sent to: melanie.miceli@gov.bc.ca
Expires: July 31, 2019
Response to the Invitation: Accepted

Permissions for the new representative:

- Client Representative

User Information

Name: Zander Higginson
User ID: BCEID\BC0877838-1
Display Name: Zander Higginson

Business Information

Legal Name: 0877838 B.C. LTD.
Doing Business As Name:
Business Address:

Contact Information

Email: Melanie.Miceli@gov.bc.ca
Telephone: 2505551212
Address:
 No address specified.

Approve Revoke Cancel

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

Who can act on behalf of PATAGONIA GOLD MINING?

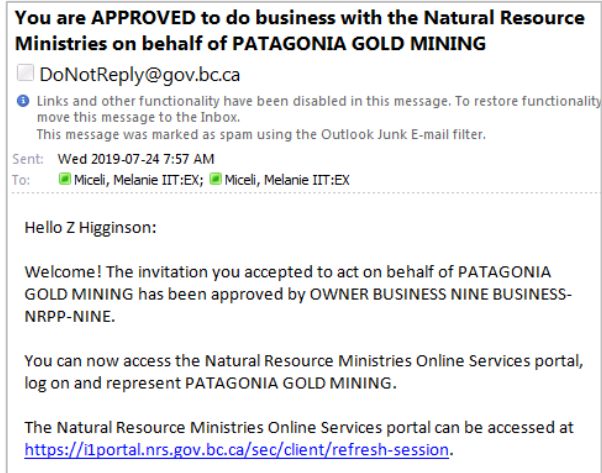
Disable Access New Access Invitation

Client Representatives Invitations

Invited User	Permissions	Invitation Expiry	Status
Z Higginson melanie.miceli@gov.bc.ca	Client Representative	July 31, 2019	Approved
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 30, 2019 Modify	Auto Approved
M. Testah melanie.miceli@gov.bc.ca	Client Representative	July 30, 2019 Modify	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Cancelled

1 of 2 1 2 5

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



1.1.4. Monitoring Invitations

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

Who can act on behalf of PATAGONIA GOLD MINING?

Client Representatives **Invitations** [New Access Invitation](#)

Invited User	Permissions	Invitation Expiry	Status
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019 Modify	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Cancelled
Z. Higginson melanie.miceli@gov.bc.ca	Client Representative	July 23, 2019 Modify	Auto Approved
Ruchi Agarwal ruchi_aa@hotmail.com	Client Representative	March 21, 2017	Approved
Ruchi Agarwal ruchi_aa@hotmail.com	Client Representative	March 20, 2017	Response Received (Accepted)

1 of 1 1 5

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.

Who can act on behalf of PATAGONIA GOLD MINING?

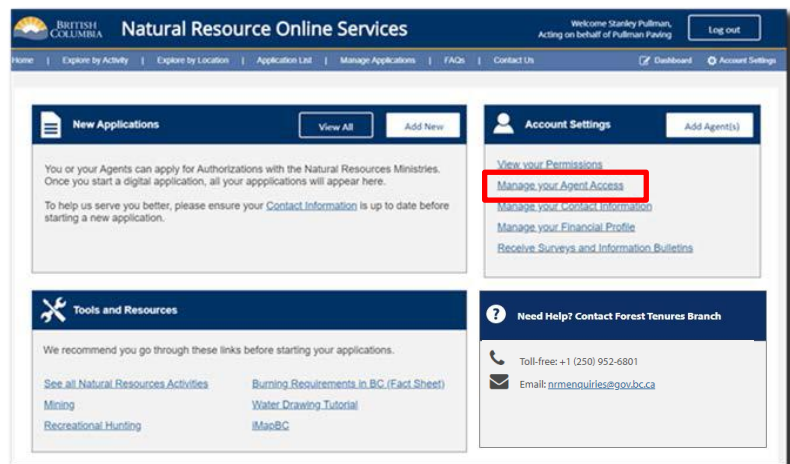
Client Representatives **Invitations** [New Access Invitation](#)

Invited User	Permissions	Invitation Expiry	Status
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019 Modify	Outstanding
K. Tester melanie.miceli@gov.bc.ca	Client Representative	July 24, 2019	Cancelled
Z. Higginson melanie.miceli@gov.bc.ca	Client Representative	July 23, 2019 Modify	Auto Approved
Ruchi Agarwal ruchi_aa@hotmail.com	Client Representative	March 21, 2017	Approved
Ruchi Agarwal ruchi_aa@hotmail.com	Client Representative	March 20, 2017	Response Received (Accepted)

1 of 1 1 5

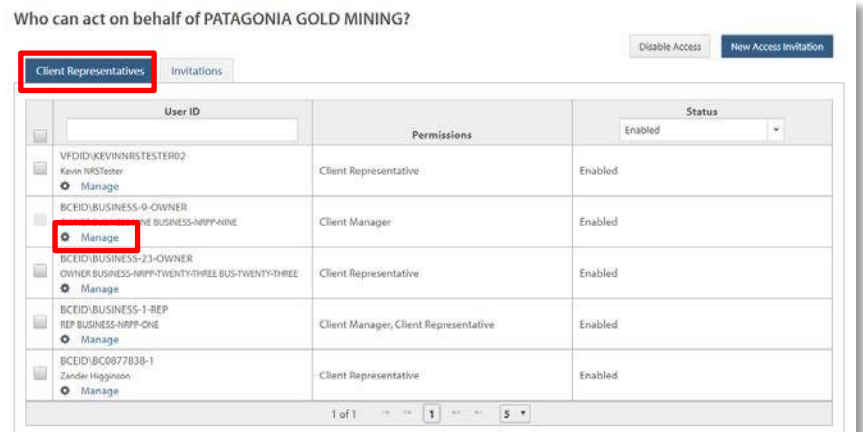
1.2. Managing Authorizations for Client Representatives

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



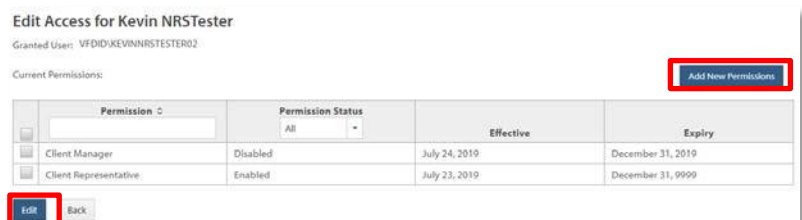
On the **Who can act on behalf of Company Name?** page the client will see a list of who can act on their behalf under the **Client Representatives** tab.

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



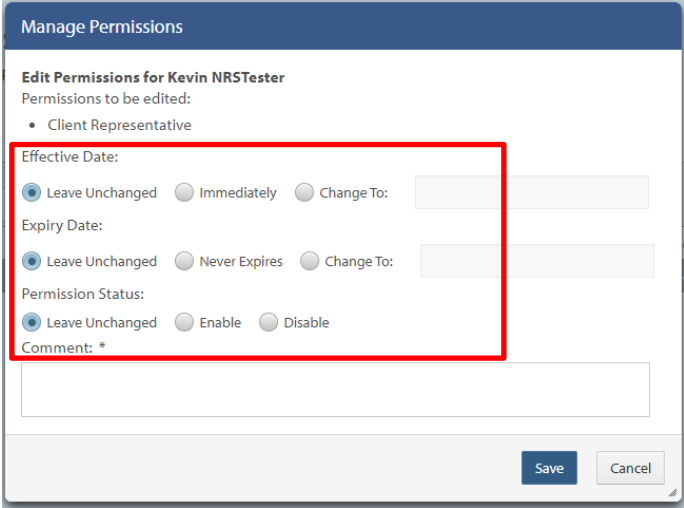
On the **Edit Access** page for the representative, the client can add a new permission by clicking the **Add New Permissions** button.

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.



Manage Permissions

Edit Permissions for Kevin NRSTester

Permissions to be edited:

- Client Representative

Effective Date:

☒ Leave Unchanged ☐ Immediately ☐ Change To:

Expiry Date:

☒ Leave Unchanged ☐ Never Expires ☐ Change To:

Permission Status:

☒ Leave Unchanged ☐ Enable ☐ Disable

Comment: *

Save **Cancel**

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.

Who can act on behalf of PATAGONIA GOLD MINING?

Client Representatives **Invitations** **Disable Access** **New Access Invitation**

User ID	Permissions	Status
VFDID\KEVINNRSTESTER02 Kevin NRSTester Manage	Client Representative	Enabled
BCEID\BUSINESS-9-OWNER OWNER BUSINESS NINE BUSINESS-NRPP-NINE Manage	Client Manager	Enabled
BCEID\BUSINESS-23-OWNER OWNER BUSINESS-NRPP-TWENTY-THREE BUS-TWENTY-THREE Manage	Client Representative	Enabled
BCEID\BUSINESS-1-REP REP BUSINESS-NRPP-ONE Manage	Client Manager, Client Representative	Enabled
BCEID\BC0877838-1 Zander Higginson Manage	Client Representative	Enabled

1 of 1 1 5

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

Click the **Disable Access** button.

Who can act on behalf of PATAGONIA GOLD MINING?

Client Representatives **Invitations** **Disable Access** **New Access Invitation**

User ID	Permissions	Status
<input checked="" type="checkbox"/> VFDID\KEVINNRSTESTER02 Kevin NRSTester Manage	Client Representative	Enabled
<input type="checkbox"/> BCEID\BUSINESS-9-OWNER OWNER BUSINESS NINE BUSINESS-NRPP-NINE Manage	Client Manager	Enabled

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**.

Who can act on behalf of PATAGONIA GOLD MINING?

Client Representatives Initations

User ID	Permissions	Status
BCEID/BUSINESS-9-OWNER OWNER BUSINESS NINE BUSINESS-ARPP-NINE Manage	Client Manager	Enabled
BCEID/BUSINESS-23-OWNER OWNER BUSINESS 23 BUSINESS-ARPP-NINE	Client Representative	Enabled

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.

Who can act on behalf of PATAGONIA GOLD MINING?

Client Representatives Initations

User ID	Permissions	Status
VFDID/PERSONAL-CLIENT-ONE PERSONAL CLIENT ONE PERSONAL-ARPP-ONE Manage	No Permissions	Disabled
VFDID/KEVINNRSTESTER02 Kevin NRSTester Manage	No Permissions	Disabled

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

Edit Access for Kevin NRSTester

Granted User: VFDID/KEVINNRSTESTER02

Current Permissions:

Permission	Permission Status	Effective	Expiry
Client Representative	Disabled	July 24, 2019	December 31, 2019
Client Representative	Disabled	July 23, 2019	December 31, 9999

Edit Back

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

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

Click **Save**.

Manage Permissions

Edit Permissions for Kevin NRSTester

Permissions to be edited:

- Client Representative

Effective Date:

Leave Unchanged Immediately Change To:

Expiry Date:

Leave Unchanged Never Expires Change To:

Permission Status:

Leave Unchanged Enable Disable

Comment: *

re-enabling

Save Cancel

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

Who can act on behalf of PATAGONIA GOLD MINING?

Disable Access New Access Invitation

User ID	Permissions	Status
VFDIDUKEVINNRSTESTER02 Kevin NRTester Manage	Client Representative	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.

Organization Selection

We have found that you can act on behalf of multiple organizations. Please choose which organization you wish to use for this session.

MINES_10
GUMMER HOLDINGS

Select

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

Natural Resource Online Services

Welcome: Xavier NRTester | Logout
Acting on behalf of MINES_10

Home Explore by Activity Explore by Location Application List Manage Applications Sign Up Contact Us FAQs Dashboard Account

Applications

Applications on the Natural Resource Sector Online Services website

Start Application

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