



Vendor User Management (VUM) User Maintenance & Management

Role: Vendor Supervisor

VUM-WI-0010-External User Management

Purpose: Vendor User Management (VUM) serves as your centralised portal for onboarding and managing Supervisors and Technicians — for both internal staff and external contractors. Whether you’re adding new trade personnel or removing users from the system, VUM streamlines and standardises these processes for all user types.

Through VUM, you can effectively manage user access and roles by key criteria such as Contract, Trade Group, and assigned responsibilities. This ensures that every user — whether an internal technician, supervisor, or external vendor — has the appropriate level of access aligned with their role and the services they provide.

This guide is designed to familiarise you with VUM’s features and functionality, enabling you to confidently navigate the platform, onboard users efficiently, and maintain compliance with PFM’s operational standards.

Primary Use: This Work Instruction is used for the following scenarios:

1. Login to VUM
2. Add a User
3. Modify / Edit a User
4. Disable a User
5. Reactivate a User
6. Resend Invitation to a User

Business Unit Application: This Work Instruction applies to Programmed Facility Management.

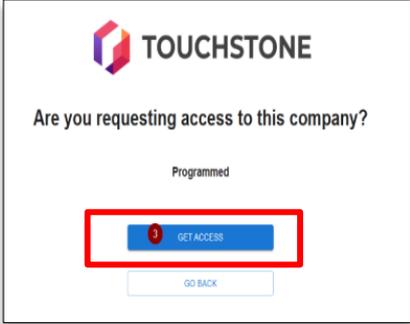
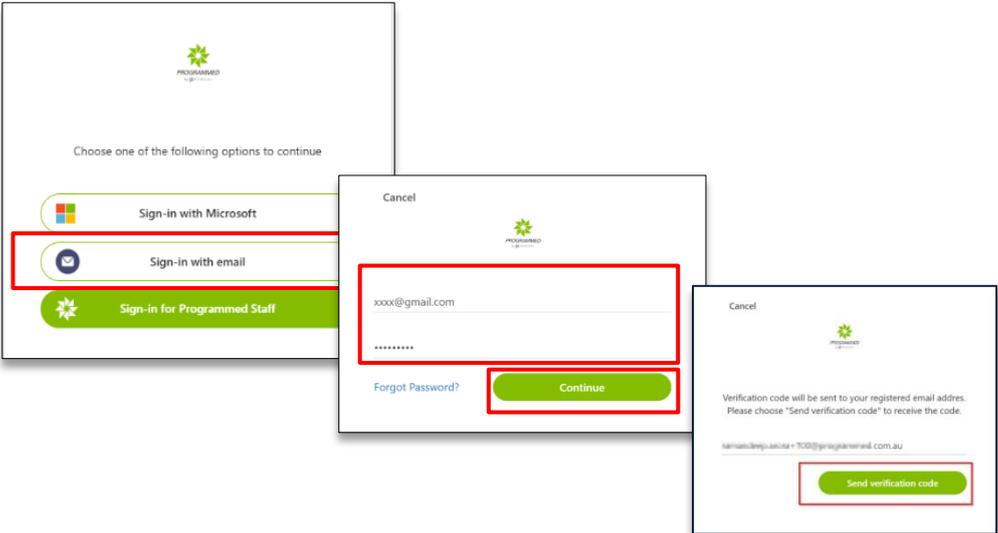
Audience: PFM Supervisors and Vendor Supervisors.

Key Fields	Definition
PFM Supervisor	PFM Supervisor is the highest level of access within VUM and if your role is PFM Supervisor you can onboard/deboard PFM Technicians, Vendor Supervisors and Vendor Technician for any Trade Group for the site relevant to your access level and associated Trade Groups.
PFM Technician	If your role is PFM Technician , you wouldn’t be able to update any details as only your Supervisor (Role Name in VUIM is PFM Supervisor) would be able to update your details.
Vendor Supervisor	If you are Vendor Supervisor for a particular Vendor Group/Business Unit, you can onboard/deboard the Technicians for that particular site and particular group only and can update the details of the Vendor Technicians which are under you.
Vendor Technician	If your role is as Vendor Technician , you wouldn’t be able to update any details as only your Supervisor (Role Name in VUM is Vendor Supervisor) would be able to update your details.
Add Users	Quickly onboard new Vendor Supervisors or Technicians, whether internal or external, by filling in key user information and assigning relevant site access.
Activate or Deactivate Users	Activate or deactivate user access as needed. This feature is helpful when staff move between contracts or when vendor engagements end.
Enable/Disable Users	Access and edit user contact information to ensure records are accurate and up to date.
Filter Users	Use search and filter options to locate specific users by Contract, Trade Group, or Name — making it easy to manage large lists of personnel efficiently.
Active	The account profile is active and can be used.
Pending	The account profile is created but not yet verified. The invitation was triggered but it needs to be accepted.
Inactive	The profile can no longer be used. Note: only PFM Supervisor or Vendor Supervisor have the ability to Deactivate/Disable the account to make it Inactive

Before you start:

- VUM has 4 levels of access – your access within VUM would be based on your role within the organisation. You will require Supervisor level access to perform the functions in this document.

Logging in to the Vendor User Management system:

Explanation	Screenshot
<p>Click on link to access the VUM login screen: https://admin.touchstone.works/</p> <p>Add Short Code: <i>Your trainer will provide you with a Training environment short code.</i></p> <p>Production codes will be issued prior to go live.</p> <p>Click CONTINUE.</p>	
<p>Click GET ACCESS.</p>	
<p>External User's such as External Trade Supervisor or External Trade Technicians:</p> <p>Click on the Sign-in with email option shown.</p> <p>Once you are logged in, enter your email id, password and click Continue.</p> <p>You may be prompted to enter a verification code. Click on Send Verification Code.</p>	

Logging In with One-Time Code

The system will send a **One-Time Code** to your registered email address.

Check your email for the code.

Enter or paste the code into the verification field.

Click **Verify Code** to complete the login.

Once successfully verified, you will be logged into the **Vendor User Management (VUM) portal** and directed to the **Home Page**.

This page serves as your central hub for managing users and accessing key functions based on your role.

Dashboard Overview

The intuitive dashboard layout is designed to simplify user management and support contract compliance—making sure the right people have the right access at the right time.

Please note that the Home Page layout and available features may vary slightly depending on the role assigned to you in the system. Your role determines your level of access and what actions you can perform.

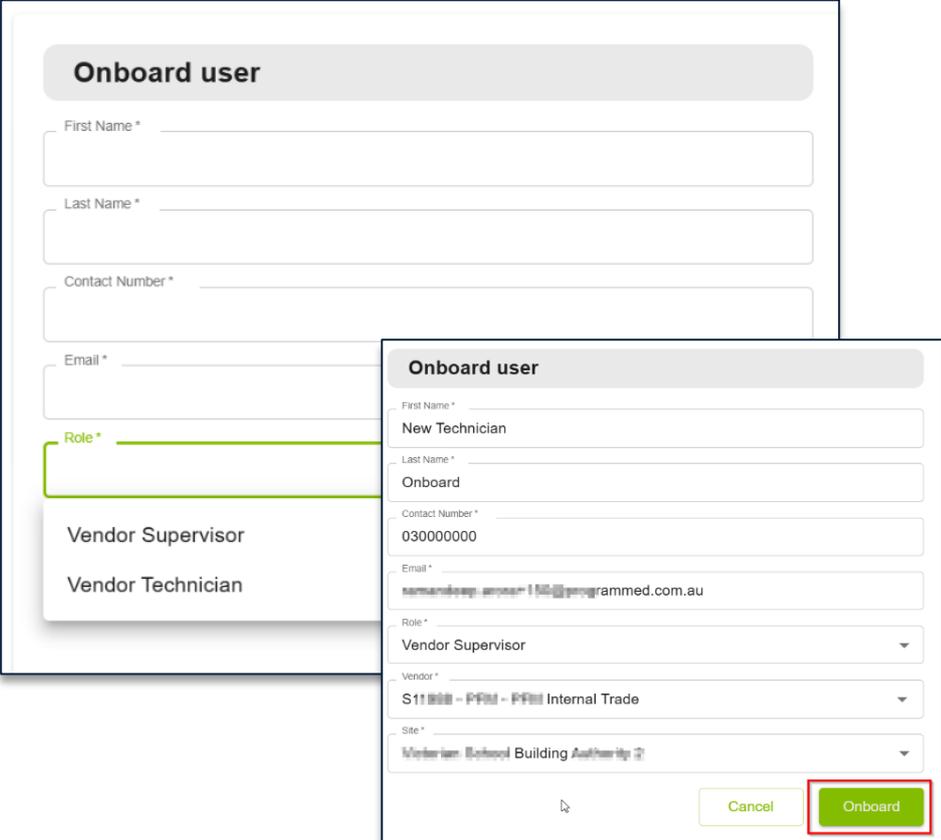
Name	Status	Email	Contact	Vendor	Role
Supervisor for Kennedy	Active	samandep@proa +700@programmed.com.au	081 524 886	Kennect (Aust) Pty Ltd	Vendor Supervisor
Technician for Kennedy	Active	samandep@proa +700@programmed.com.au	081 524 886	Kennect (Aust) Pty Ltd	Vendor Technician

However, the overall structure and interface remain consistent across all roles to ensure a smooth and user-friendly experience for everyone.

The **default view** on the Home Page is the **Dashboard View**, which provides a comprehensive overview of vendor user management activities. Key features available from this dashboard include:

- **Add Users:** Quickly onboard new Vendor Supervisors or Technicians, whether internal or external, by filling in key user information and assigning relevant site access.
- **Enable/Disable Users:** Activate or deactivate user access as needed. This feature is helpful when staff move between contracts or when vendor engagements end.
- **View/Update Contact Details:** Access and edit user contact information to ensure records are accurate and up to date.
- **Filter Users:** Use search and filter options to locate specific users by **Contract**, **Trade Group**, or **Name**—making it easy to manage large lists of personnel efficiently.

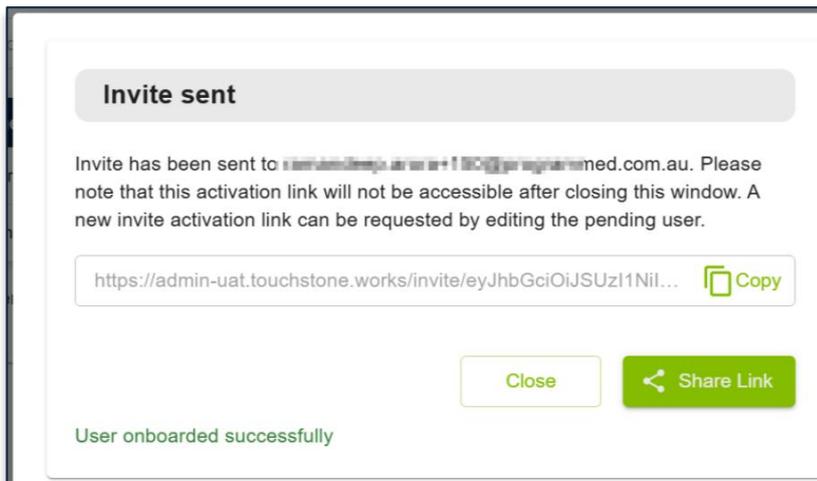
Adding Users:

Explanation	Screenshot
<p>Adding a New User (Supervisors Only)</p> <p>If your access level is PFM Supervisor or Vendor Supervisor, you have the ability to add another Supervisor or Technician.</p> <p>To do this:</p> <ul style="list-style-type: none"> • Click on Add User. • This will open the Onboard User screen where you can enter the new user's details. 	 <p>The screenshot shows the Touchstone user management interface. At the top, there is a navigation bar with the Touchstone logo, the PROGRAMMED logo, and the user's name 'Samuel King PFM Supervisor'. Below the navigation bar is a sidebar with 'Dashboard', 'Download Touchstone', and 'Help' options. The main content area has a search bar labeled 'Search user by name or email' and a green 'Add user' button highlighted with a red box. There is also a 'Filter' button next to the search bar.</p>
<p>Completing the Onboarding Form</p> <p>Fill in the following required fields:</p> <ul style="list-style-type: none"> • First Name • Last Name • Contact Number • Email Address <p>Then, use the dropdown menus to select:</p> <ul style="list-style-type: none"> • Role (choose from <i>PFM Technician, Vendor Supervisor, or Vendor Technician</i>) • Vendor Group • Site <p><i>Note: Available options under Role, Vendor Group, or Site may vary depending on your access level.</i></p> <p>Once all required fields are completed, the Onboard button will turn green. Click the green Onboard button to proceed.</p>	 <p>The screenshot shows the 'Onboard user' form. It has several input fields: 'First Name *', 'Last Name *', 'Contact Number *', and 'Email *'. Below these is a 'Role *' dropdown menu which is open, showing 'Vendor Supervisor' and 'Vendor Technician' as options. Below the dropdown are two more dropdown menus: 'Vendor *' (showing 'S11000 - PFM - PFM Internal Trade') and 'Site *' (showing 'Melburn School Building Authority'). At the bottom right, there are two buttons: a green 'Onboard' button highlighted with a red box and a 'Cancel' button.</p>

Email Verification

The system will send a verification email to the address you entered in Step 2 or Step 3.

Please check your inbox and follow the instructions in the email to complete the verification process.



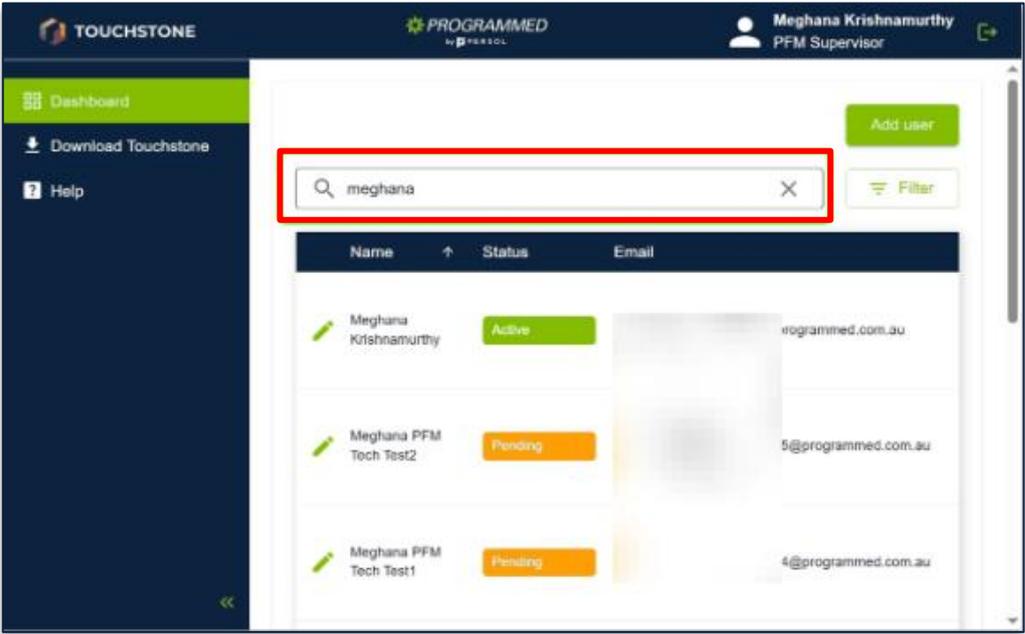
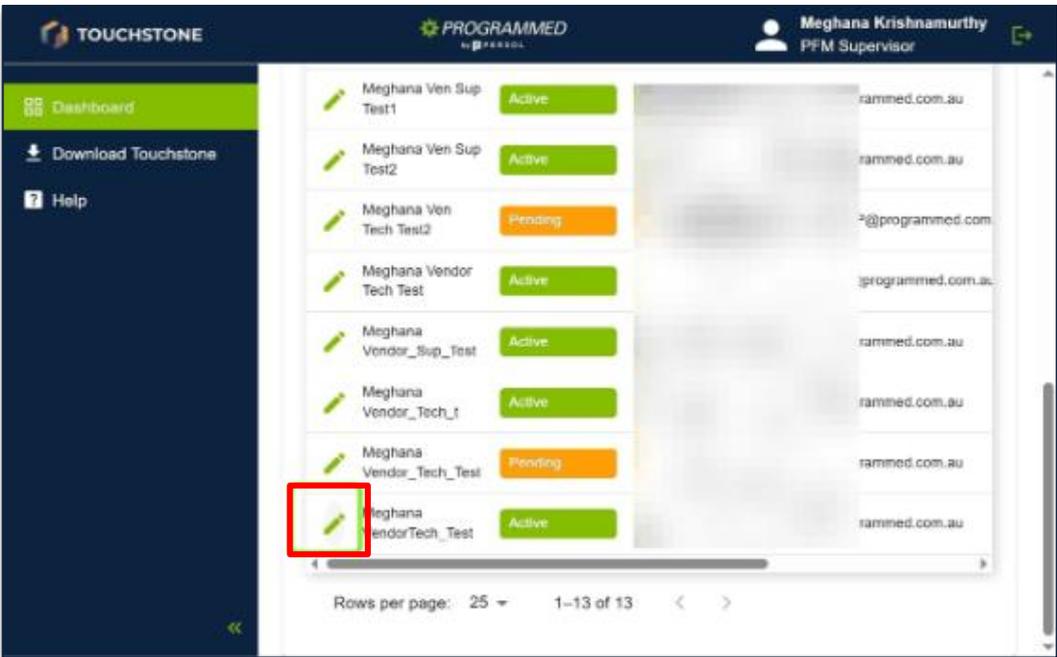
User Activation:

Explanation	Screenshot
<p>Account Activation</p> <p>Once a user has been onboarded, they must activate their account before they can log in.</p> <p>The system will automatically send an activation email. The user should click Accept Invite in the email, which will redirect them to the login screen shown below.</p> <p>To complete the login, follow the VUM User Guide for Vendor Technicians.</p>	

Account Status:

<p>Checking User Account Status</p> <p>At any time, a Supervisor can view the status of a user account to determine whether it is:</p> <p>This feature helps Supervisors effectively monitor user access and ensure account statuses are up to date.</p>	<p>Active – The user has successfully logged in and is active in the system. Pending – The user has been onboarded but has not yet activated their account. Inactive – The user account has been disabled or is no longer in use.</p>
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Modifying or Editing a User:

Explanation	Screenshot
<p>In the dashboard Search field, enter the details of the user to be modified.</p>	 <p>The screenshot shows the Touchstone user management interface. A search bar at the top right contains the text 'meghana'. Below the search bar is a table with columns for Name, Status, and Email. The table lists three users: Meghana Krishnamurthy (Active), Meghana PFM Tech Test2 (Pending), and Meghana PFM Tech Test1 (Pending).</p>
<p>Click the Pencil icon to edit the record.</p>	 <p>The screenshot shows the Touchstone user management interface with a list of users. A pencil icon next to the user 'Meghana VendorTech_Test' is highlighted with a red box, indicating it is the record to be edited. The table lists various users with their names, status (Active or Pending), and email addresses.</p>

Work Instruction

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Project NextGen

Igniting change, uniting teams.

Edit any of the required fields.

TOUCHSTONE PROGRAMMED Meghana Krishnamurthy

Meghana VendorTech_Test
BK PUMP SERVICES PTY LTD
Active [Disable]

First Name *
Meghana

Last Name *
VendorTech_Test

Contact Number *
045555555

Email *
@programmed.com.au

Role *
Vendor Technician

Vendor *
PUMP SERVICES PTY LTD

Site *
Southern Queensland Correction Centre (Galton Prison)

Click **Save**.

TOUCHSTONE PROGRAMMED Meghana Krishnamurthy

Meghana VendorTech_Test
Active

First Name *
Meghana_k_k

Last Name *
VendorTech_Test

Contact Number *
045555555

Email *
l@programmed.com.au

Role *
Vendor Technician

Vendor *
S14001 - PFM - BK PUMP SERVICES PTY LTD

Site *
Southern Queensland Correction Centre (Galton Prison)

[Cancel] [Save]

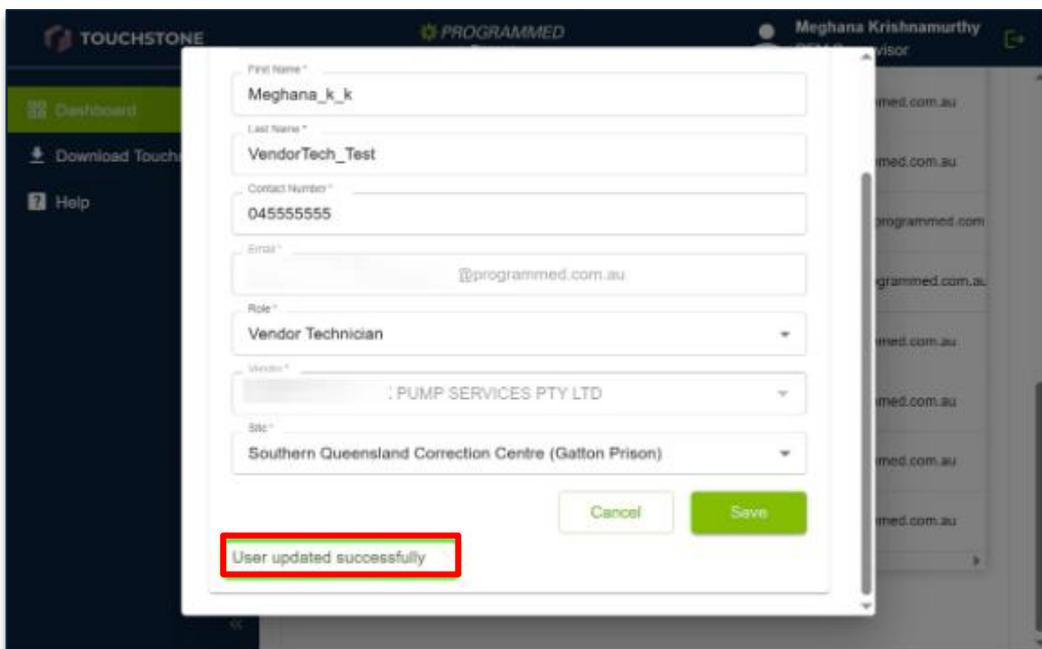
Work Instruction

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Project NextGen

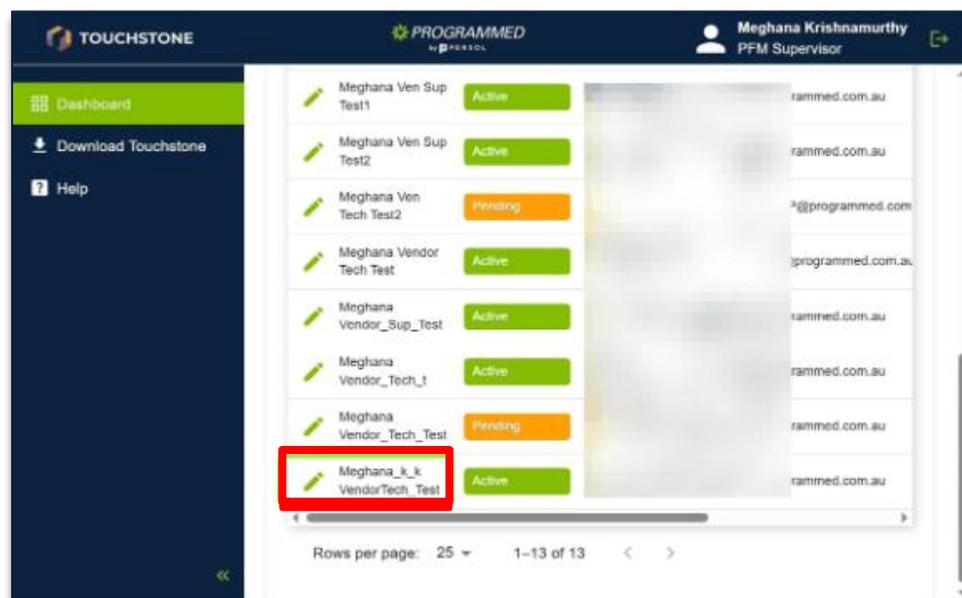
Igniting change, uniting teams.

Ensure the **User updated successfully** response is received.

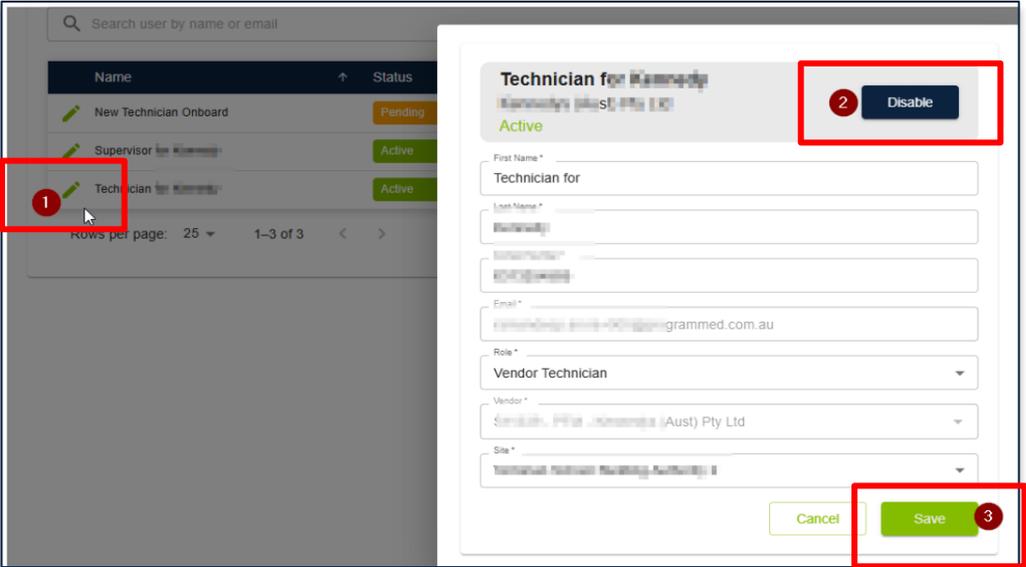
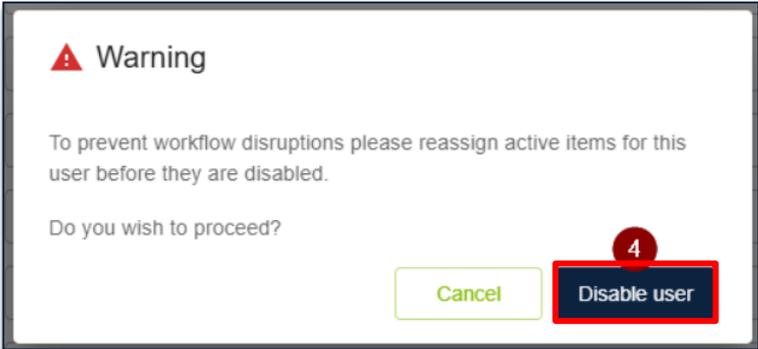


Ensure changes are reflected in the dashboard.

Result: The user profile has been updated.



Disabling a User Profile:

Explanation	Screenshot
<p>Disabling a User Profile</p> <p>As a PFM Supervisor or Vendor Supervisor, you can edit user details or change the status of a Technician when required.</p> <p>To disable a user, go to the Dashboard, search for the relevant user profile, and click the pencil icon to open the editing window.</p> <p>In the pop-up window, confirm that you've selected the correct user. If so, select the Disable option.</p> <p>Once the changes have been made, click Save to update the user's status.</p>	
<p>Important: Before disabling a user, ensure that any active or pending Work Orders (WOs) assigned to the technician are reassigned to the appropriate user to avoid disruption.</p> <p>Continue only once all active items have been reassigned.</p> <p>In the pop-up window, click on Disable User. The page will refresh, and the selected profile will now display a status of Inactive.</p> <p>Result: The user profile can now be enabled or disabled as needed.</p>	

Work Instruction

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Igniting change, uniting teams.

Ensure the **User disabled successfully** message appears and the user status is now Inactive.

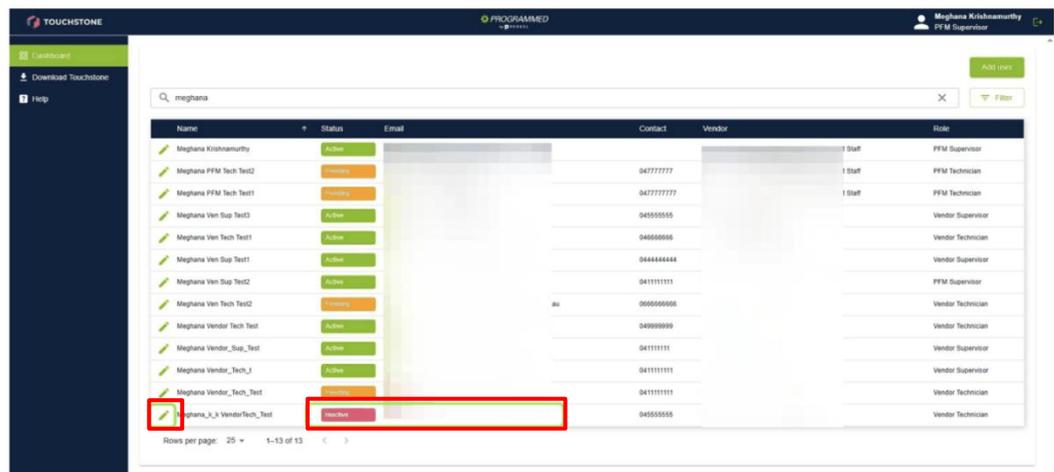


Reactivate a User:

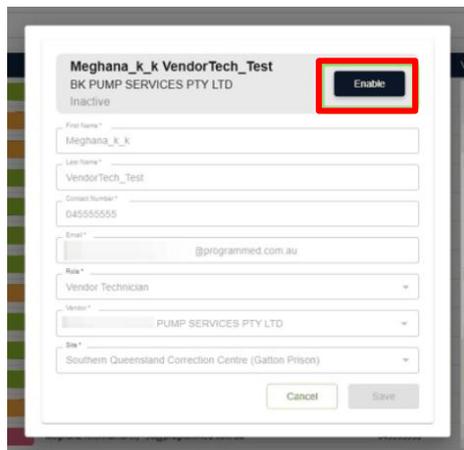
Explanation

Click the **Pencil icon** to edit the record of an Inactive user.

Screenshot



Click **Enable**.



Click **Save**. Ensure the **User enabled successfully** message appears and the user status is now **Active**.

Meghana_k_k VendorTech_Test
BK PUMP SERVICES PTY LTD

Active

First Name*
Meghana_k_k

Last Name*
VendorTech_Test

Contact Number*
04555555

Email*
@programmed.com.au

Role*
Vendor Technician

Vendor*
PUMP SERVICES PTY LTD

Site*
Southern Queensland Correction Centre (Gatton Prison)

Cancel Save

User enabled successfully

Reinvite user:

Explanation

Screenshot

Click the **Pencil icon** to edit the record of a **Pending** user.

Name	Status	Email	Contact	Vendor
Meghana Krishnamurthy	Active			FM Staff
Meghana PFM Tech Test2	Pending		04777777	FM Staff
Meghana PFM Tech Test1	Pending		04777777	FM Staff
Meghana Ven Sup Test3	Active		04555555	
Meghana Ven Tech Test1	Active		04555555	
Meghana Ven Sup Test1	Active		04444444	
Meghana Ven Sup Test2	Active		04111111	
Meghana Ven Tech Test2	Pending		06000000	
Meghana Vendor Tech Test	Active		04999999	
Meghana Vendor_Tech_Test	Active		04111111	
Meghana Vendor_Tech_1	Active		04111111	
Meghana Vendor_Tech_Test	Pending		04111111	
Meghana_k_k VendorTech_Test	Active		04555555	

Click **Reinvite**.

Meghana Vendor_Tech_Test
BK PUMP SERVICES PTY LTD

Pending

First Name*
Meghana

Last Name*
Vendor_Tech_Test

Contact Number*
04111111

Email*
@programmed.com.au

Role*
Vendor Technician

Vendor*
SERVICES PTY LTD

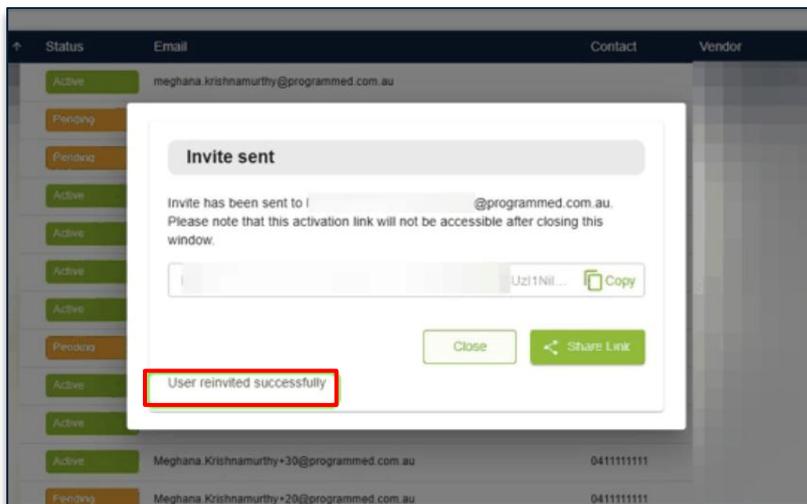
Site*
Southern Queensland Correction Centre (Gatton Prison)

Reinvite Cancel Save

Ensure the **User reinvited Successfully** message appears.

Click **Close**.

Result: An invite link will be emailed to the user.



Related Work Instructions or Process Maps:

Work Instruction: VUM - Vendor Field Technician - Activating & Downloading Touchstone Mobile App

History			
Description	Reference #	Date	Authority / WI Owner
New Work Instruction		19 th May 2025	Programmed Facility Management
Next Review Due		Upon new release	