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Vendor User Management (VUM)
User Maintenance & Management

Role: PFM Vendor Administrator

VUM-WI-0030-PFM User Management

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Work Instruction

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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.
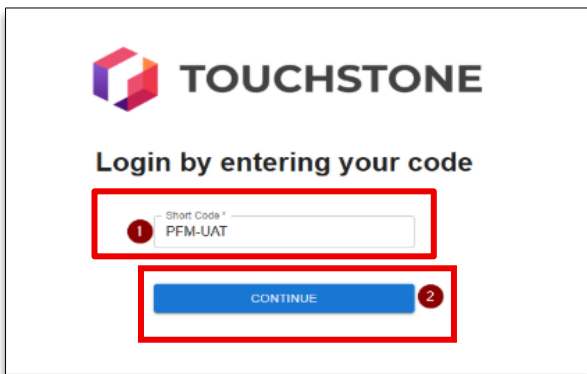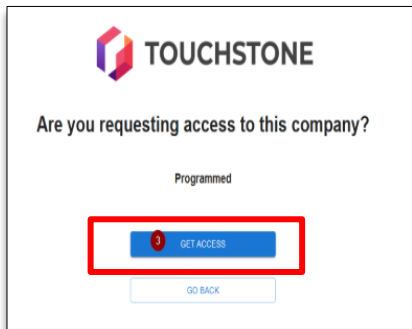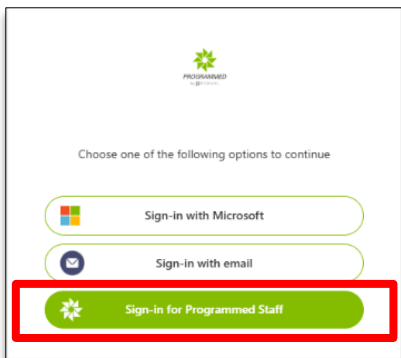
Audience: PFM Supervisors and Vendor Supervisors.

Key Fields	Definition
PFM Supervisor	This is the highest level of access in VUM. As a PFM Supervisor, you can onboard and offboard: • PFM Technicians • Vendor Supervisors • Vendor Technicians You have permission to manage users across all Trade Groups and sites relevant to your access level.
PFM Technician	As a PFM Technician, you do not have permission to update or manage user details. Any changes to your information must be made by your designated PFM Supervisor.
Vendor Supervisor	As a Vendor Supervisor, you are responsible for onboarding and offboarding Vendor Technicians within your assigned Vendor Group or Business Unit and associated site. You can also update the details of the Vendor Technicians who report to you.
Vendor Technician	Vendor Technicians do not have access to manage or update their own profile information. All updates must be performed by their assigned Vendor Supervisor.
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
Click on link to access the VUM login screen: https://admin.touchstone.works/ Add Short Code: *Your trainer will provide you with a Training environment short code.* Production codes will be issued prior to go live. Click **CONTINUE**.	**TOUCHSTONE** Login by entering your code Short Code * PFM-UAT CONTINUE
Click **GET ACCESS**.	**TOUCHSTONE** Are you requesting access to this company? Programmed GET ACCESS GO BACK
Accessing the Login Screen You will be directed to the login screen, which may appear slightly different depending on your role and access level. *Tip: Refer to the VUM Roles section at the beginning of this guide to understand how your role impacts system access.* Click the **Sign in for Programmed Staff** option to log in.	Choose one of the following options to continue Sign-in with Microsoft Sign-in with email Sign-in for Programmed Staff *Note: If you are accessing the system from a Programmed-issued desktop or laptop, your login credentials will be automatically recognised via the network domain, and you will be signed in without needing to enter them manually*

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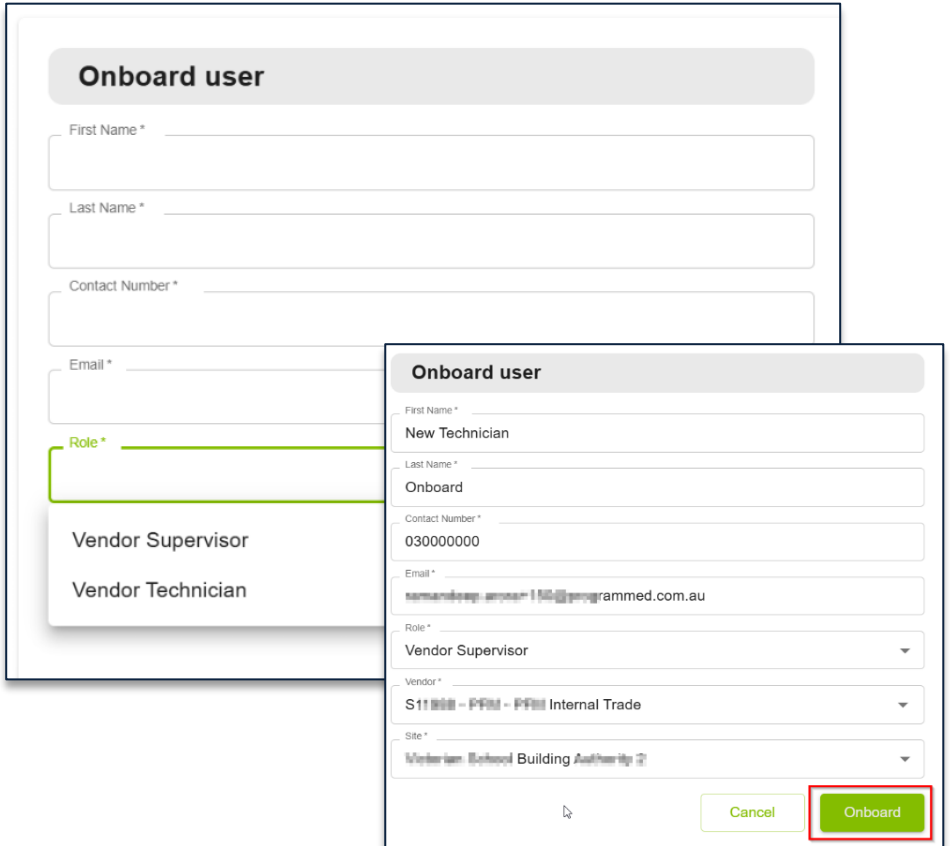
However, the overall structure and interface remain consistent across all roles to ensure a smooth and user-friendly experience for everyone.

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.

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Adding Users:

Explanation	Screenshot
Adding a New User (Supervisors Only) If your access level is **PFM Supervisor** you have the ability to add another **Supervisor** or **Technician**. To do this: • Click on **Add User**. • This will open the **Onboard User** screen where you can enter the new user's details.	
Completing the Onboarding Form Fill in the following required fields: • First Name • Last Name • Contact Number • Email Address Then, use the dropdown menus to select: • Role *(choose from PFM Technician, Vendor Supervisor, or Vendor Technician)* • Vendor Group • Site *Note: Available options under Role, Vendor Group, or Site may vary depending on your access level.* Once all required fields are completed, the Onboard button will turn green. **Click** the green **Onboard** button to proceed.	

Work Instruction

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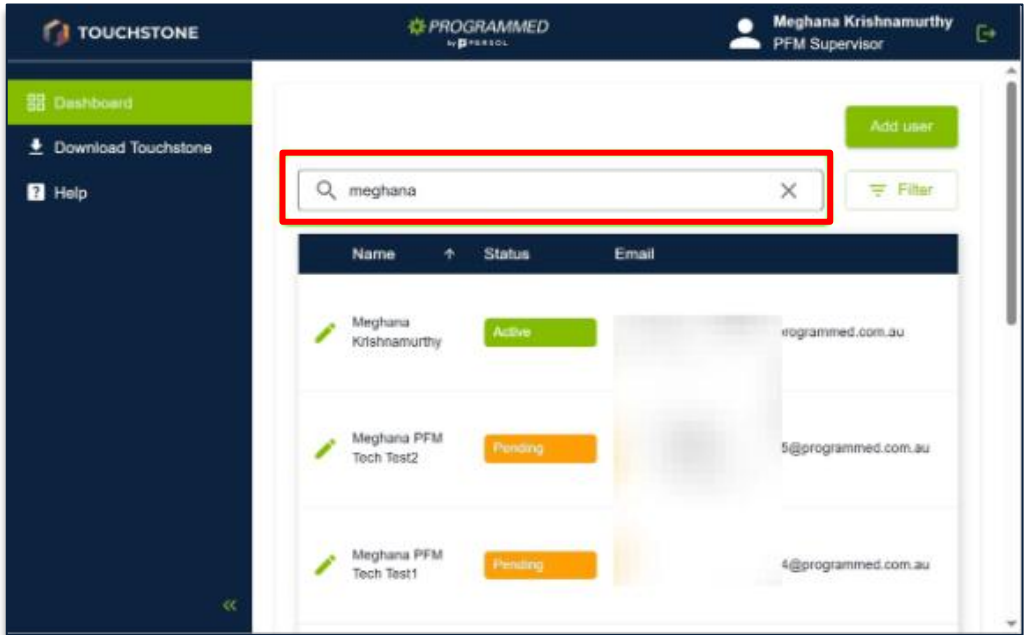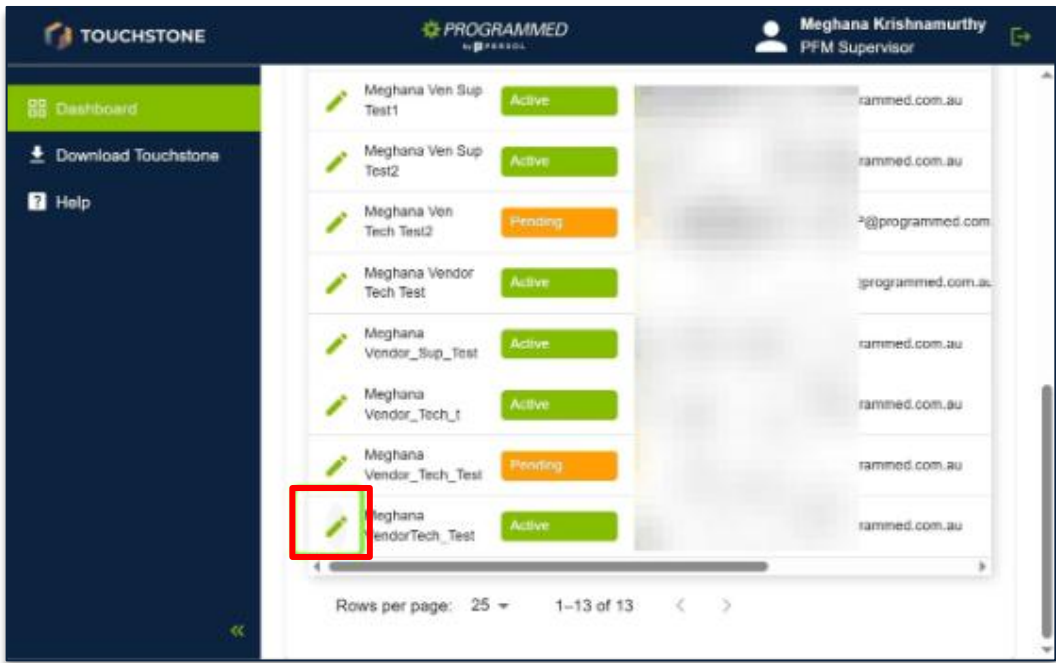|	
Email Verification The system will send a verification email to the address you entered in Step 2 or Step 3. Please check your inbox and follow the instructions in the email to complete the verification process.	**Invite sent** Invite has been sent to ▪▪▪▪▪▪▪med.com.au. Please note that this activation link will not be accessible after closing this window. A new invite activation link can be requested by editing the pending user. https://admin-uat.touchstone.works/invite/eyJhbGciOiJSUzI1NiI... 📋 Copy Close ⮜ Share Link User onboarded successfully
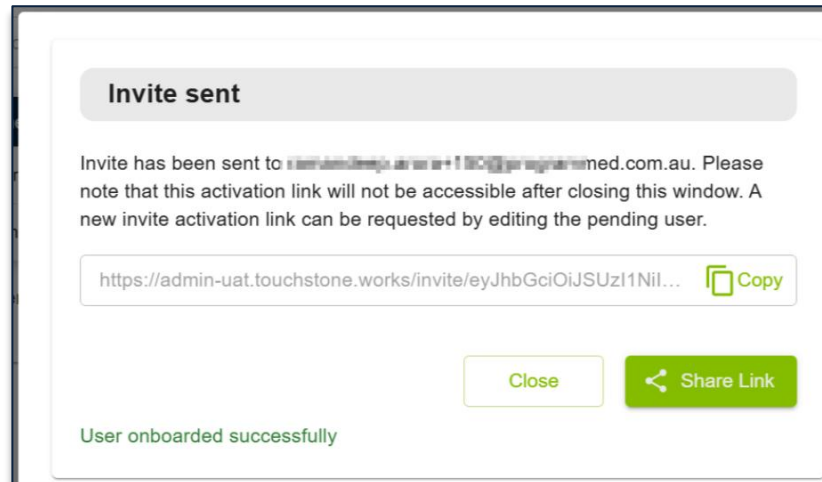
User Activation:

Explanation	Screenshot
Account Activation Once a user has been onboarded, they must **activate their account** before they can log in. 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. To complete the login, follow the **VUM User Guide for PFM Field Technicians.**	

Account Status:

Checking User Account Status At any time, a Supervisor can view the status of a user account to determine whether it is: This feature helps Supervisors effectively monitor user access and ensure account statuses are up to date.	

Name	↑	Status	Email	Contact	Vendor
New Technician Onboard		Pending	▪▪▪▪med.com.au	▪▪▪▪	▪▪▪▪ Pty Ltd
Supervisor ▪▪		Active	▪▪▪▪med.com.au	▪▪▪▪	▪▪▪▪ Pty Ltd
Technician ▪▪		Inactive	▪▪▪▪med.com.au	▪▪▪▪	▪▪▪▪ Pty Ltd

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.

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Modifying or Editing a User:

Explanation	Screenshot
In the dashboard **Search** field, enter the details of the user to be modified.	
Click the **Pencil icon** to edit the record.	

Edit any of the required fields.	
Click **Save**.	

Ensure the **User updated successfully** response is received.	
Ensure changes are reflected in the dashboard. Result: The user profile has been updated.	
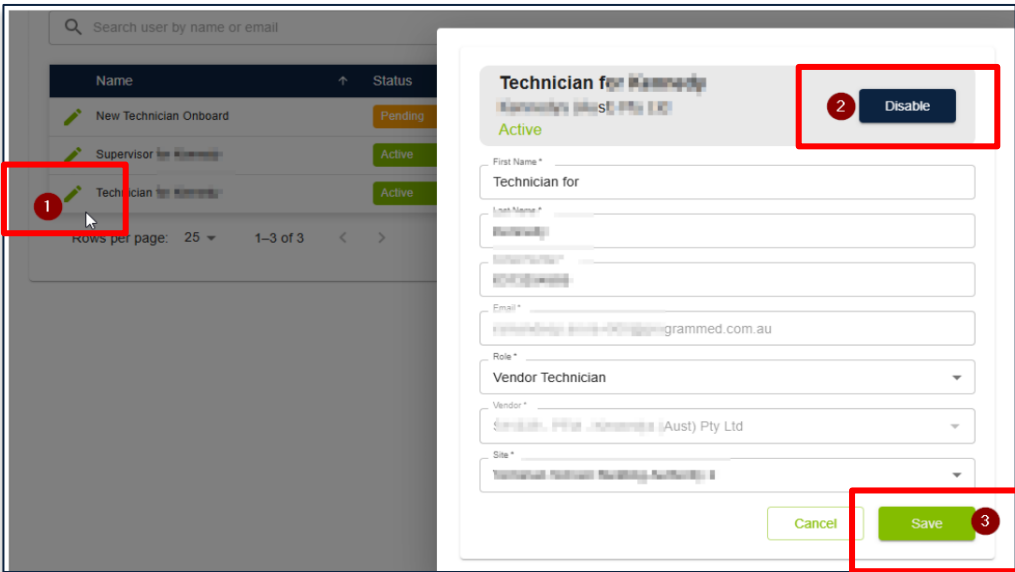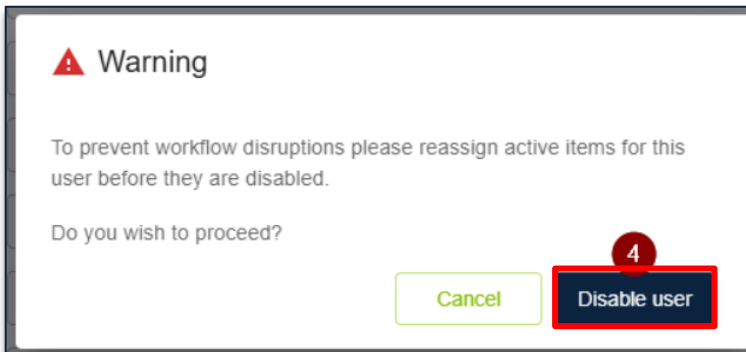
Disabling a User Profile:

Explanation	Screenshot
Disabling a User Profile As a PFM Supervisor or Vendor Supervisor, you can **edit user details** or change the **status of a Technician** when required. To **disable** a user, go to the Dashboard, search for the relevant user profile, and click the pencil icon to open the editing window. In the pop-up window, confirm that you've selected the correct user. If so, select the **Disable** option. Once the changes have been made, click **Save** to update the user's status.	
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.* **Continue only once all active items have been reassigned.** **In the pop-up window, click on Disable User.** The page will refresh, and the selected profile will now display a status of Inactive. **Result**: *The user profile can now be enabled or disabled as needed.*	

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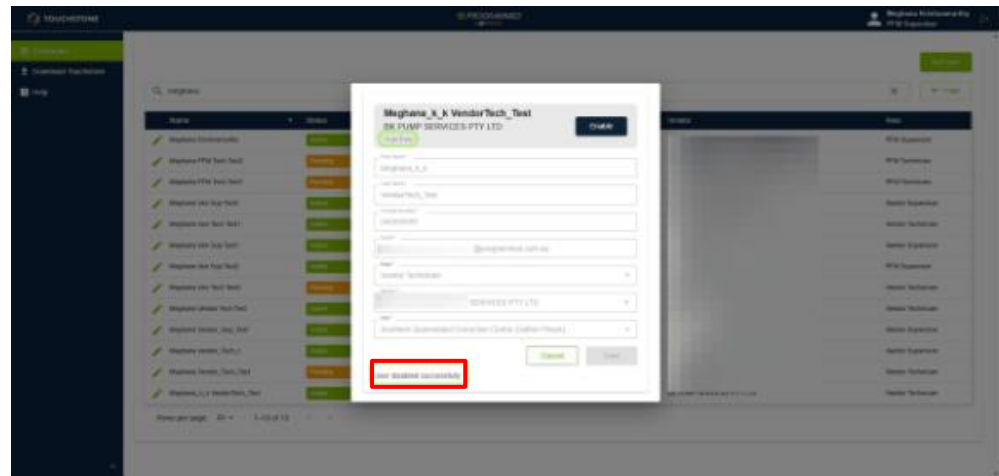
Reactivate a User:

Explanation	Screenshot
Click the **Pencil icon** to edit the record of an Inactive user.	
Click **Enable.**	
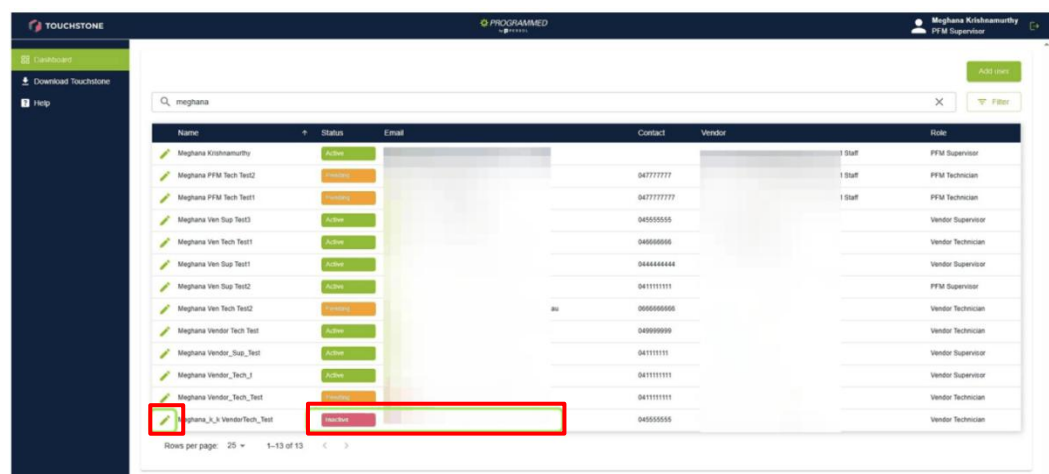
Click **Save**. Ensure the **User enabled successfully** message appears and the user status is now **Active**.	

Reinvite user:

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

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Ensure the **User reinvited Successfully** message appears. Click **Close.** **Result**: An invite link will be emailed to the user.	
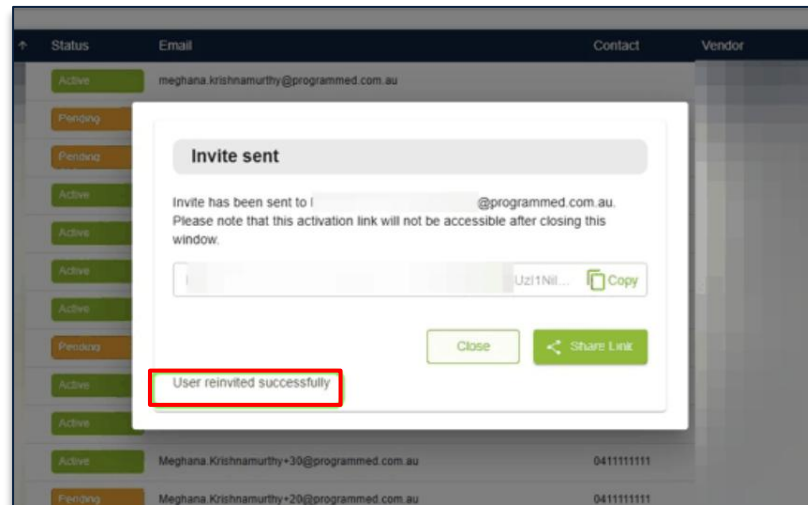
Related Work Instructions or Process Maps:

VUM-WI-0010-External User Management
VUM-WI-0020-Activating & Downloading the Touchstone Mobile Application

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