Core: how-to guide

IntraSync
November 20, 2026

Core is the common system every IntraSync module shares. Administrators use it to add the people who sign in, decide what each of them can reach, and review a trail of every change. Everyone uses it for their own preferences, notifications, feedback, flags and questions from the IntraSync team.

> *Written for: Administrator, Plant manager, Every signed-in user.*

> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

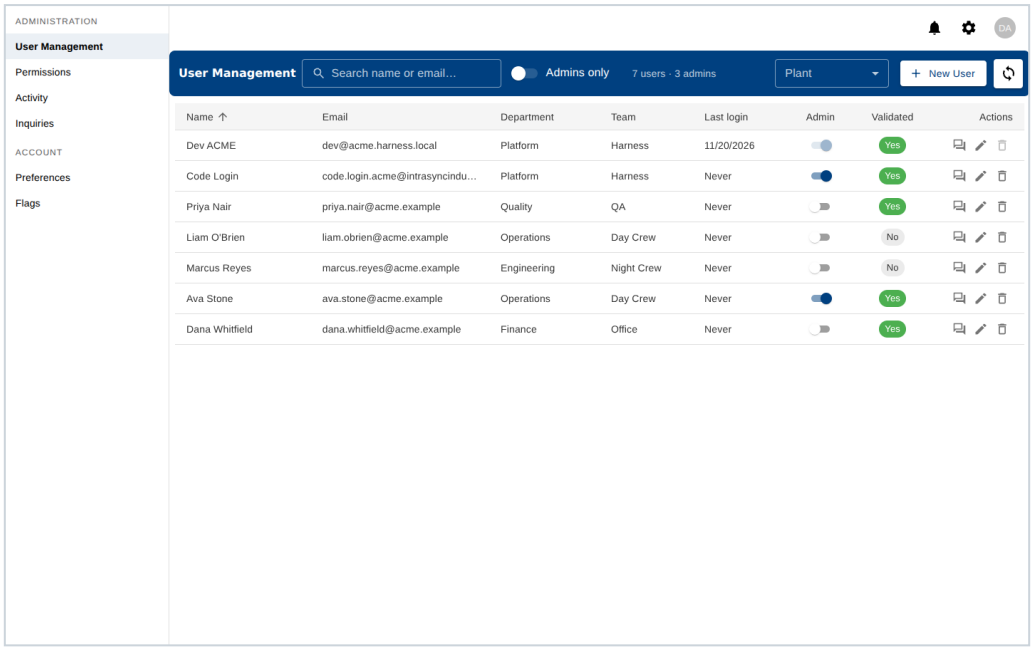
- 1. Find your way around
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- 4. Change a person's details or password
- 5. Keep comments, tags and files on a person
- 6. Make someone an administrator, or remove it
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- 9. Change or delete a role
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- 11. Allow or block one person's access to a page
- 12. Check what a person can actually do
- 13. Decide who may use each module's permissions
- 14. Set your own preferences
- 15. Send feedback to the IntraSync team
- 16. Read your notifications
- 17. Change your password, sign out of other devices, or sign out
- 18. Answer a question from the IntraSync team
- 19. Work through the flags raised for you
- 20. Choose where flags go
- 21. Review the activity trail

1. Find your way around

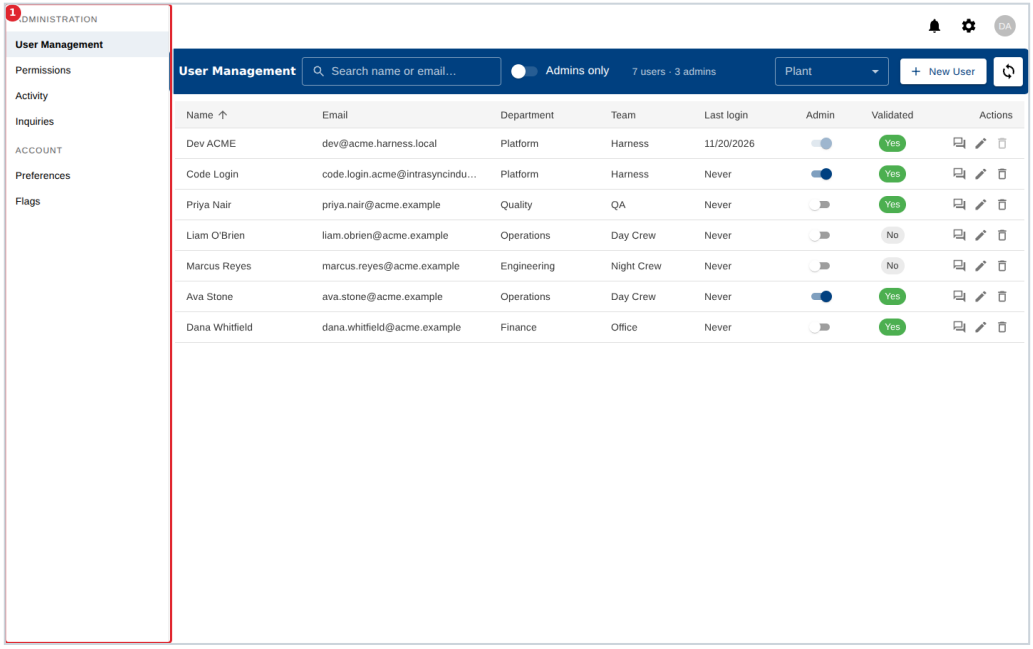
Know where each page lives before you start, so every other task in this guide is one click away.

Before you start:

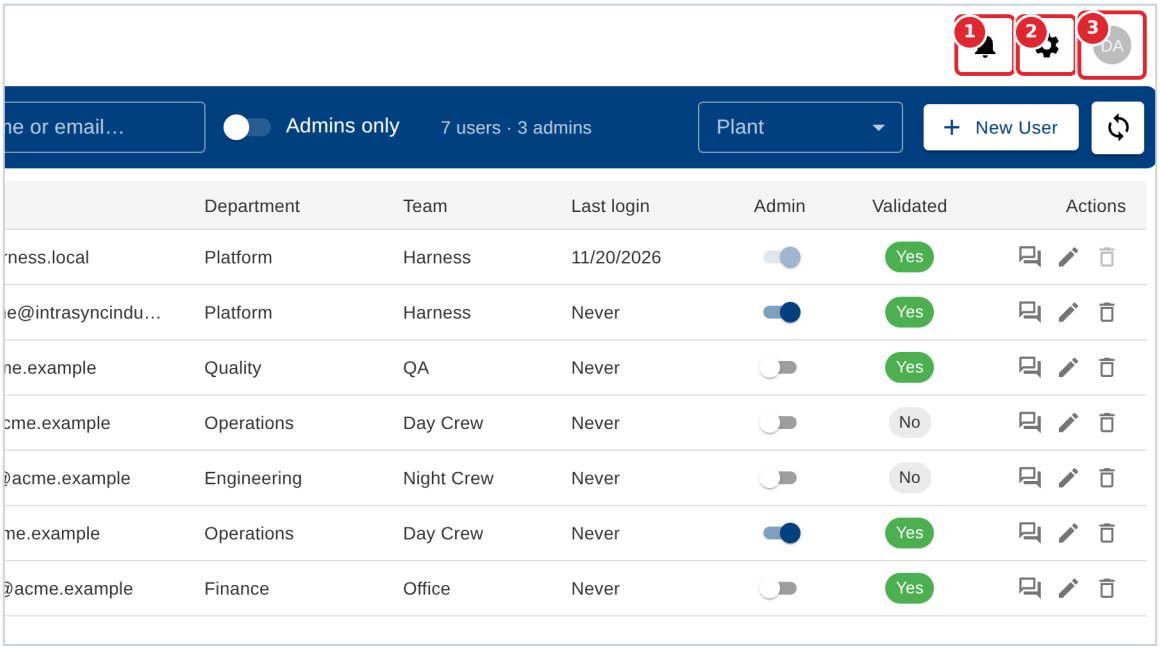
– An account that someone in your company has added for you, and your password.



Step 1. Sign in. You land on User Management.



Step 2. Use the menu on the left to move between pages. Administration holds the company's pages; Account holds your own.



Step 3. Use the icons at the top right for notifications, settings and your account.

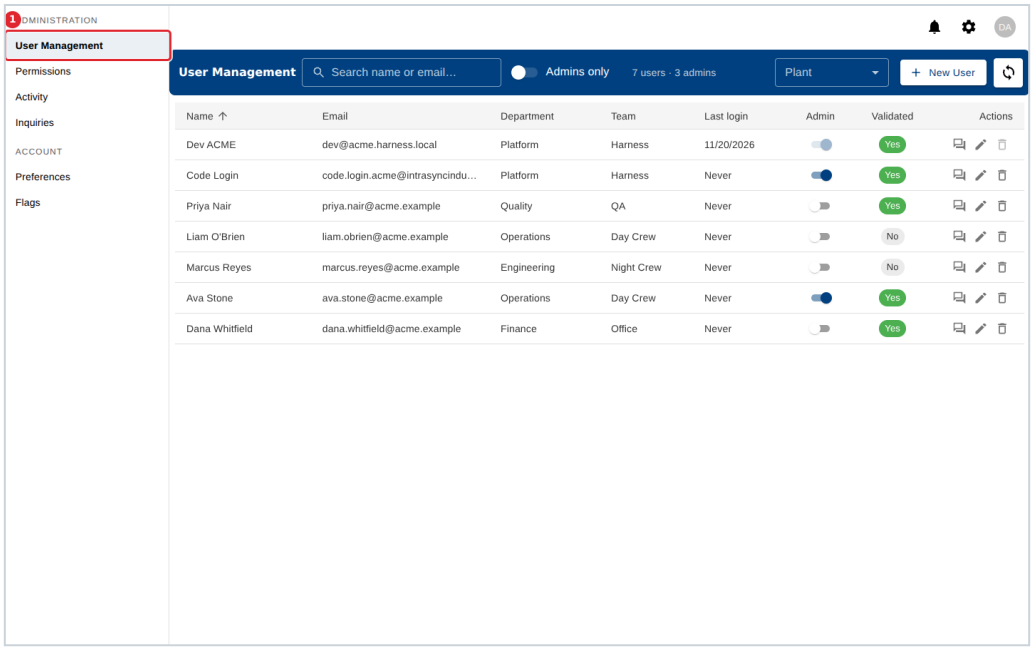
Tips:

- If a chip saying Offline appears at the top, changes made by other people are not reaching you. The app reconnects by itself.
- Each page has a Refresh button in its blue header bar that reloads what you see.

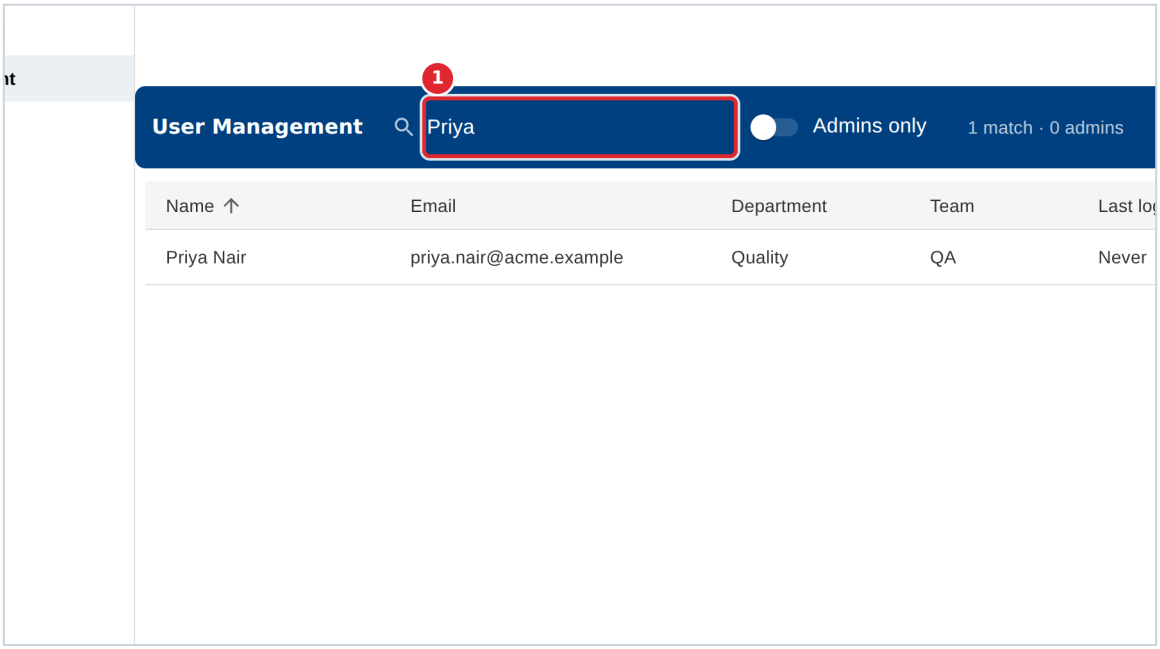
This is shown in the Core video at 0:03.

2. Find a person in your company

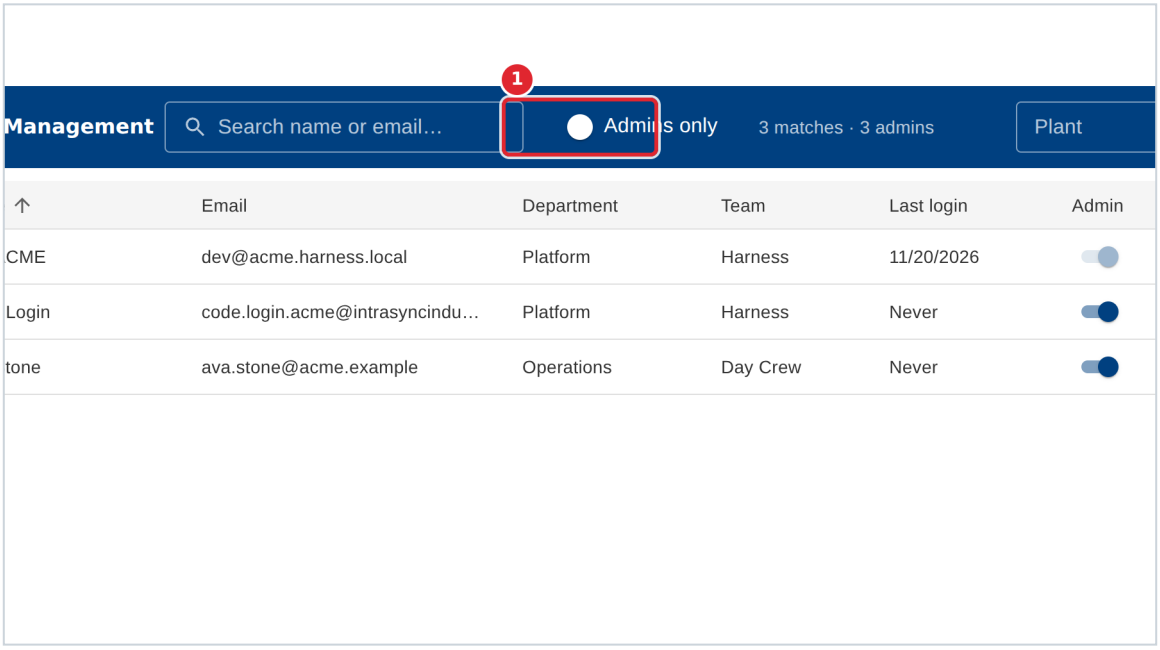
Look someone up before you change their access, their details or their roles.



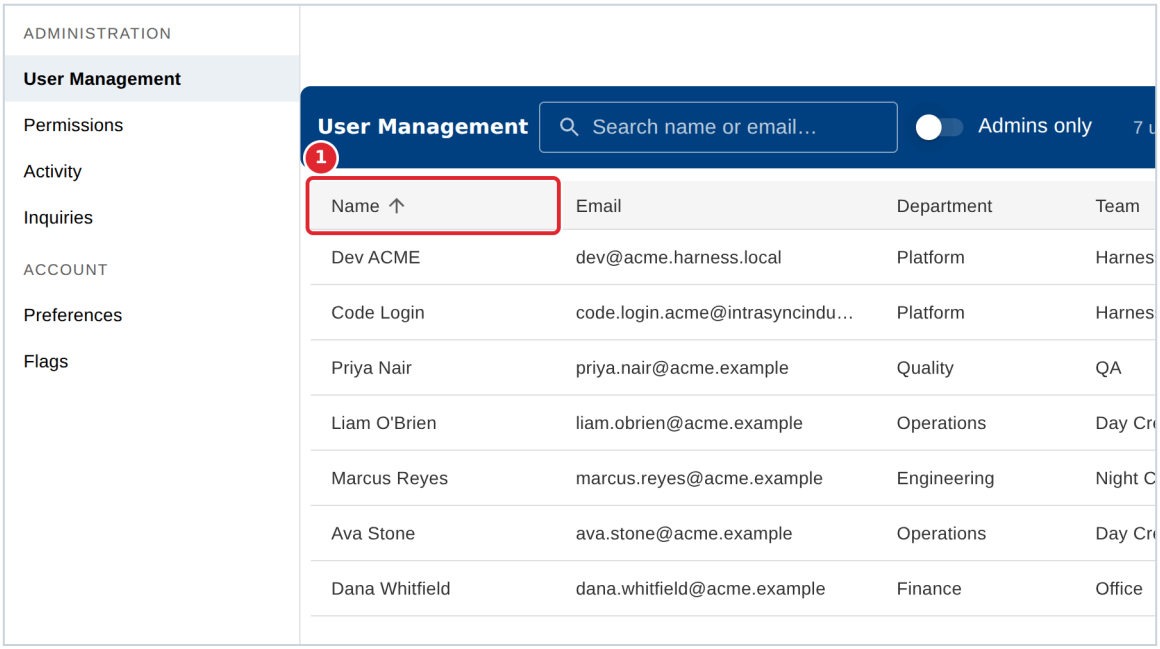
Step 1. Open User Management.



Step 2. Type part of a name or email in the search box. The list narrows as you type.



Step 3. Turn on Admins only to see just the administrators. The count beside it says how many are shown.



Step 4. Select a column heading, such as Name or Last login, to sort by it.

– Step 5. If the list is long, select Load more at the bottom to see the rest.

Tips:

– Search looks at names and email addresses only, not at departments or teams.
– If nothing matches, the list says No users match the current filter. Clear the search box to see everyone again.
– Where your company has more than one plant, use the Plant menu in the header to choose the plant you are working in.

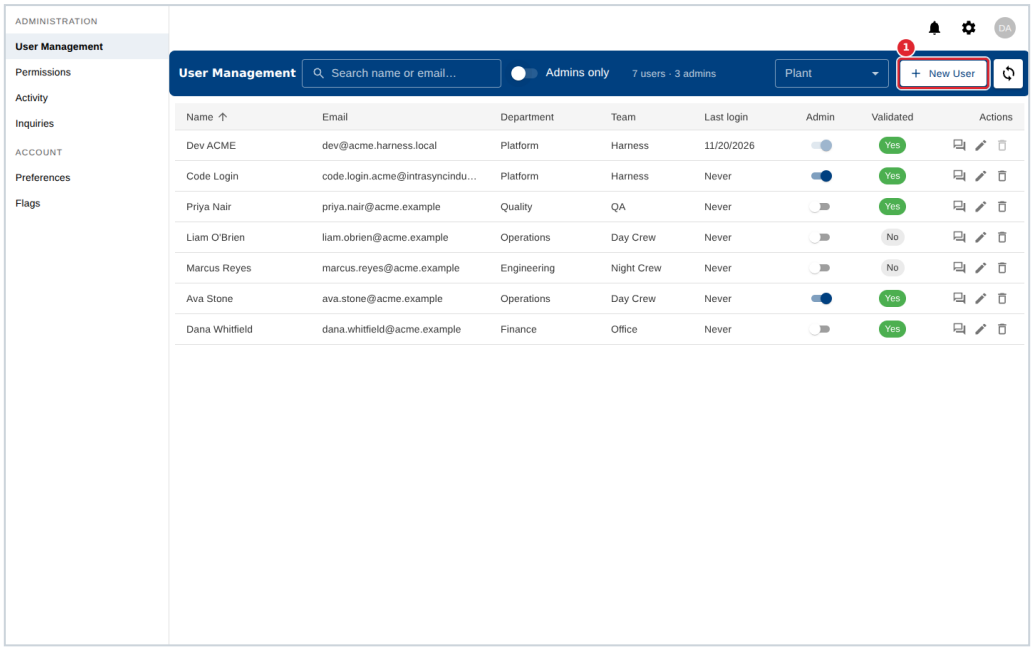
This is shown in the Core video at 0:06.

3. Add a person

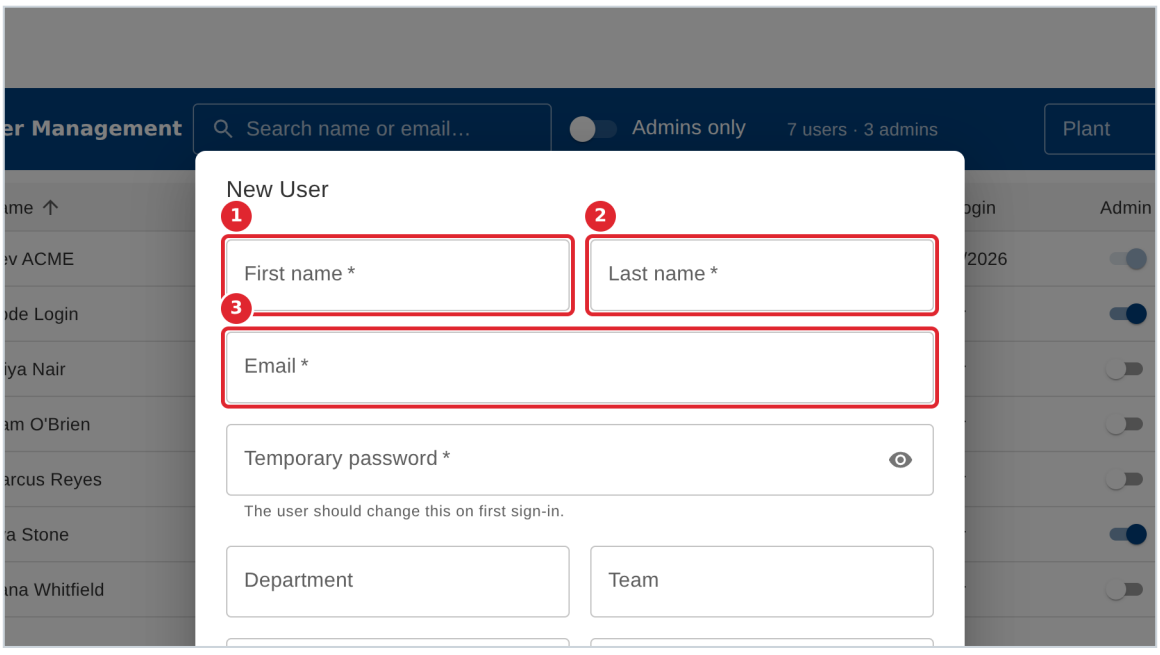
Give a new member of staff their own sign-in, with the roles that decide what they can reach.

Before you start:

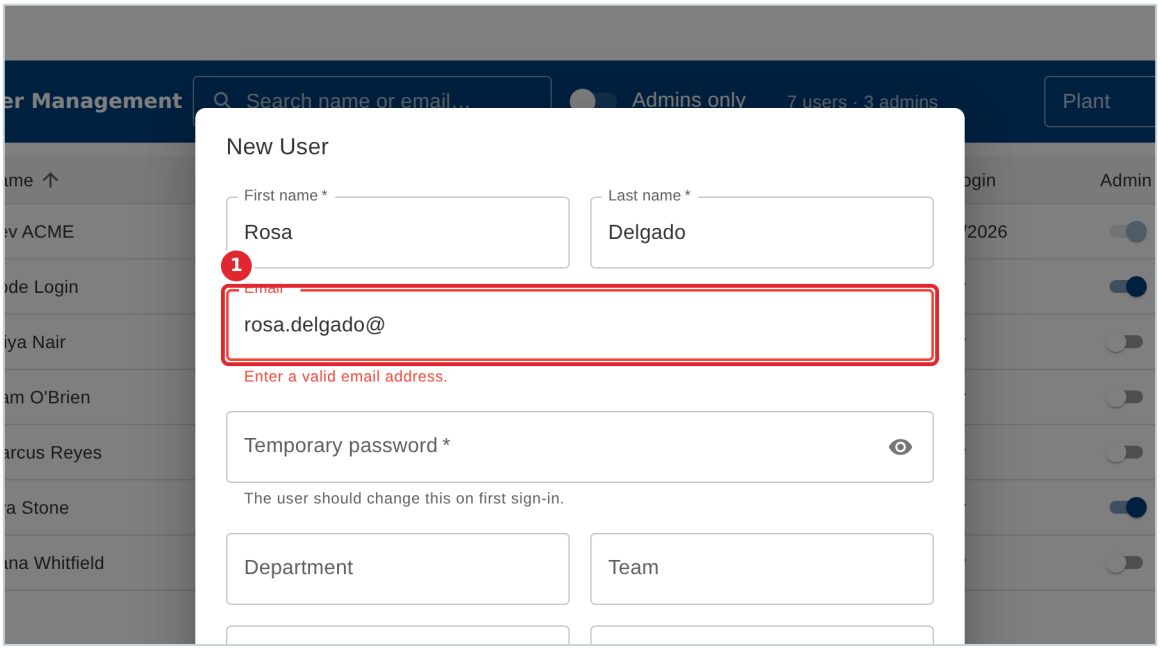
– You are an administrator.



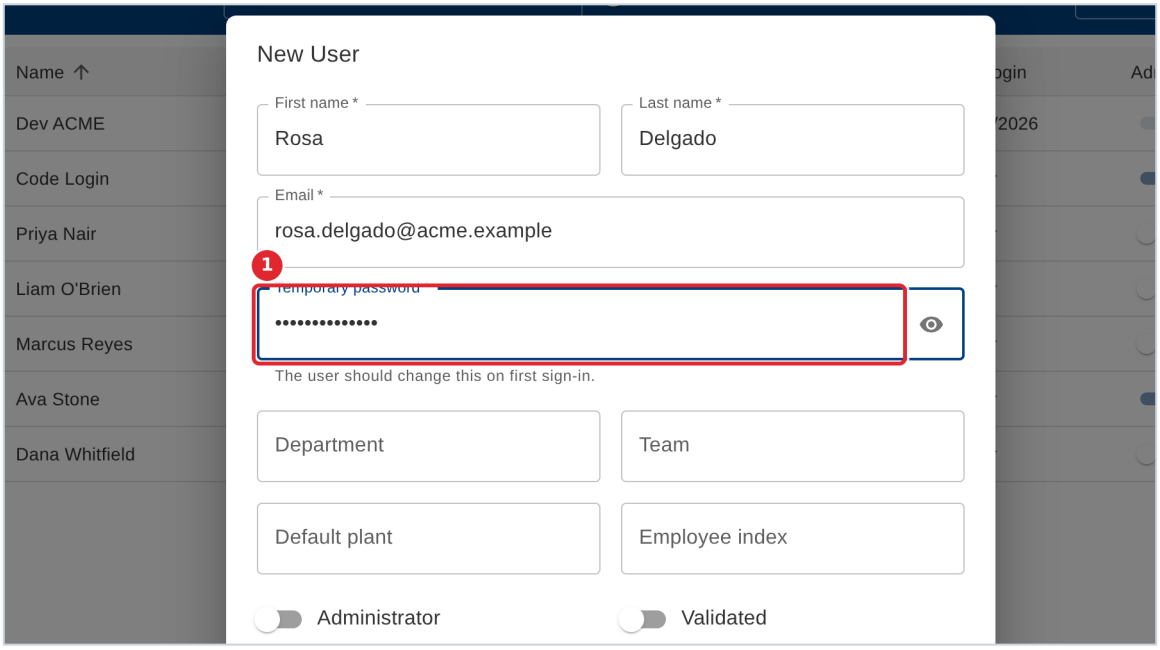
Step 1. On User Management, select New User.



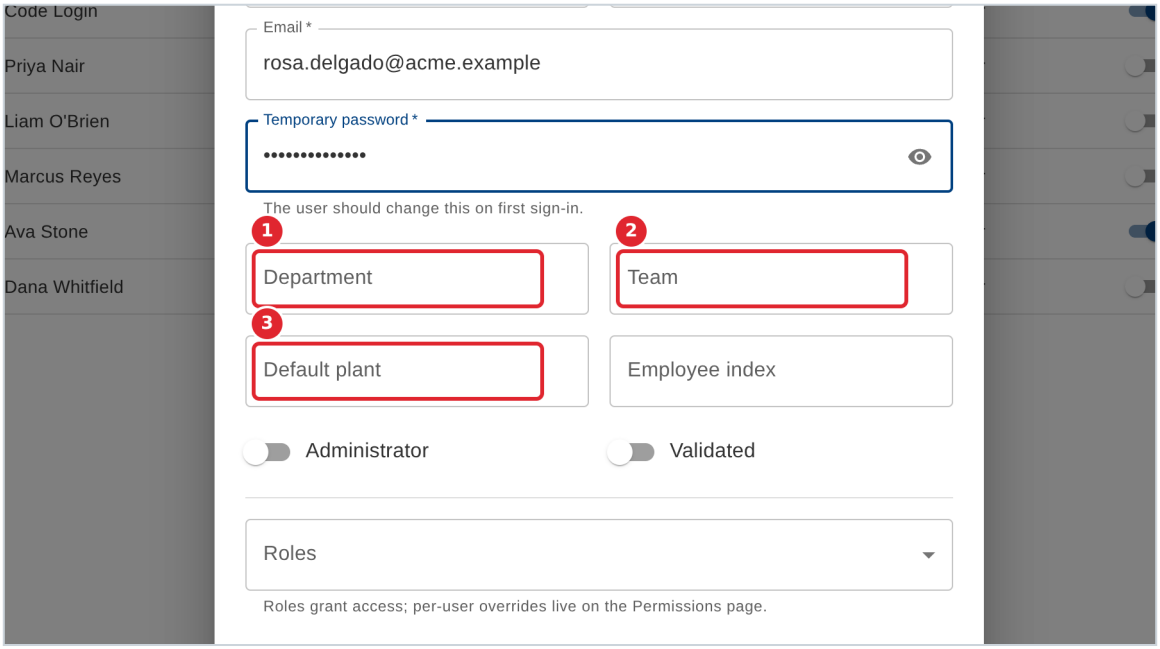
Step 2. Fill in First name, Last name and Email. All three are required.



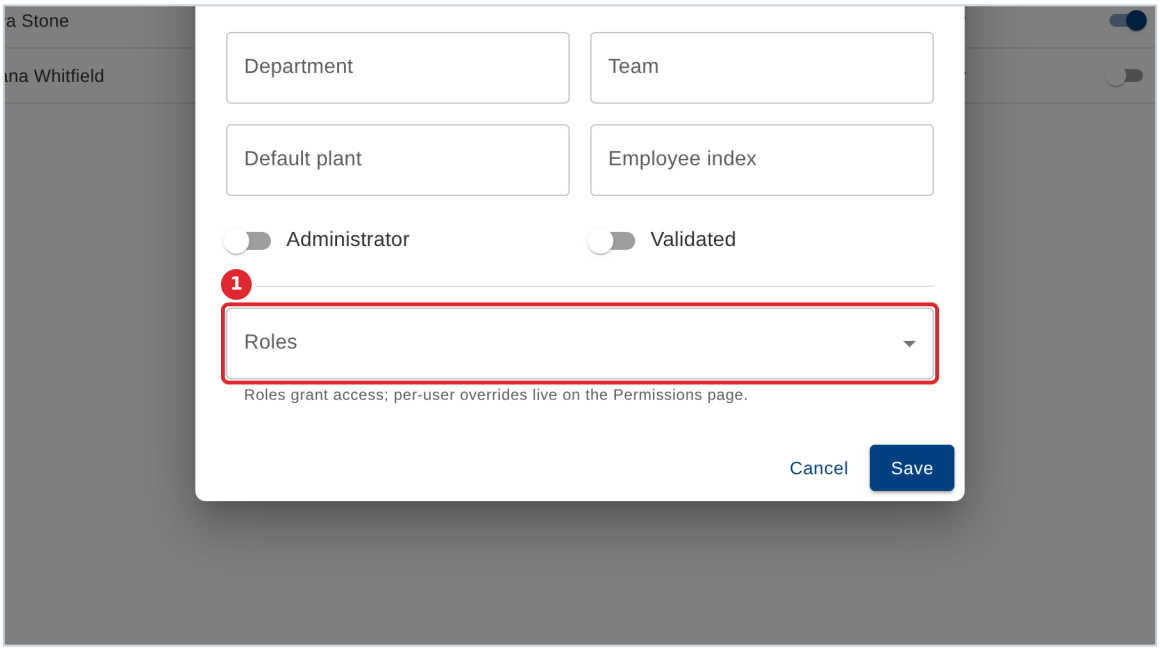
Step 3. If the email is not complete, the form says so and Save stays unavailable.



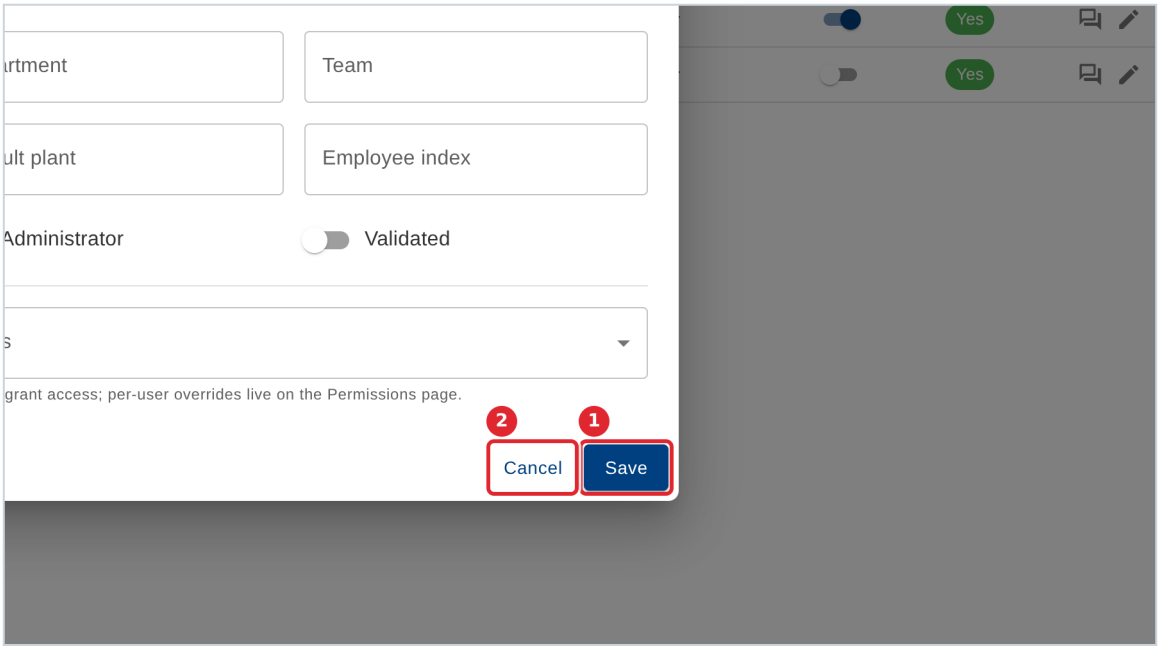
Step 4. Enter a temporary password. The person should change it the first time they sign in.



Step 5. Optionally fill in Department, Team, Default plant and Employee index, and turn on Administrator or Validated.



Step 6. Choose one or more Roles. Roles decide what the person can reach.



Step 7. Select Save. Select Cancel to close without adding the person.

Tips:

- Save stays unavailable until First name, Last name, a valid email and a temporary password are filled in.
- If the form says Enter a valid email address, the email is incomplete or mistyped.
- A short password is accepted, but eight characters or more is recommended.
- Department and Team suggest your company's own lists. Text that matches no entry is saved as text only and is not linked to a department or team.
- If you close the form after typing in it, you are asked whether to discard your changes or keep editing.

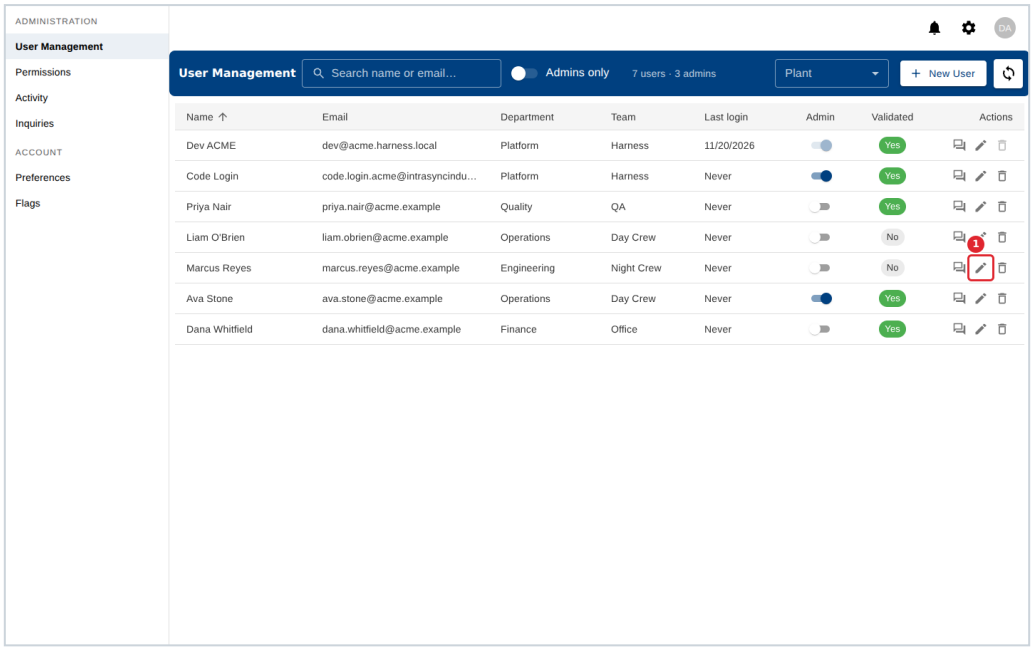
This is shown in the Core video at 0:19.

4. Change a person's details or password

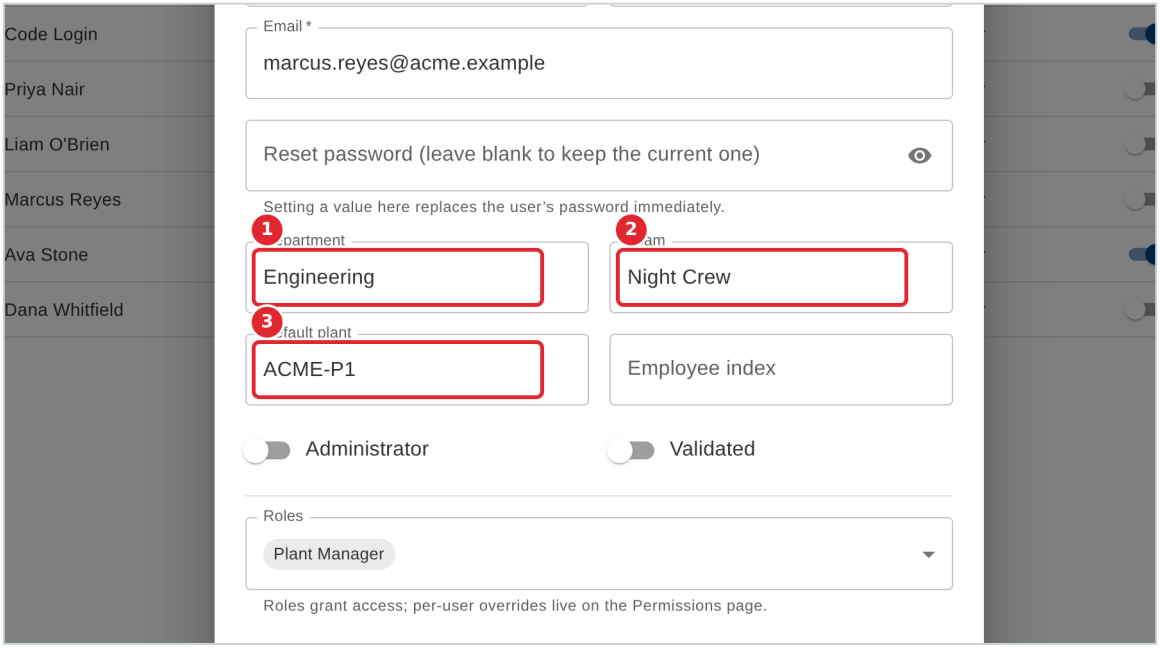
Keep someone's name, email, department, team and plant up to date, or reset a forgotten password.

Before you start:

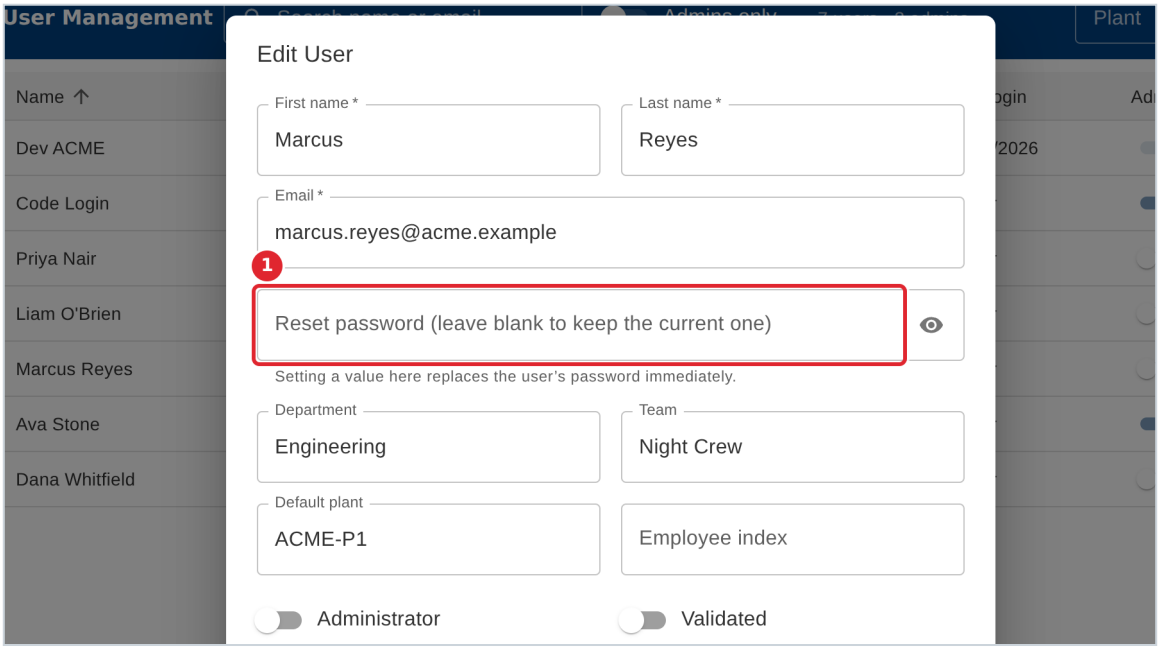
– You are an administrator.



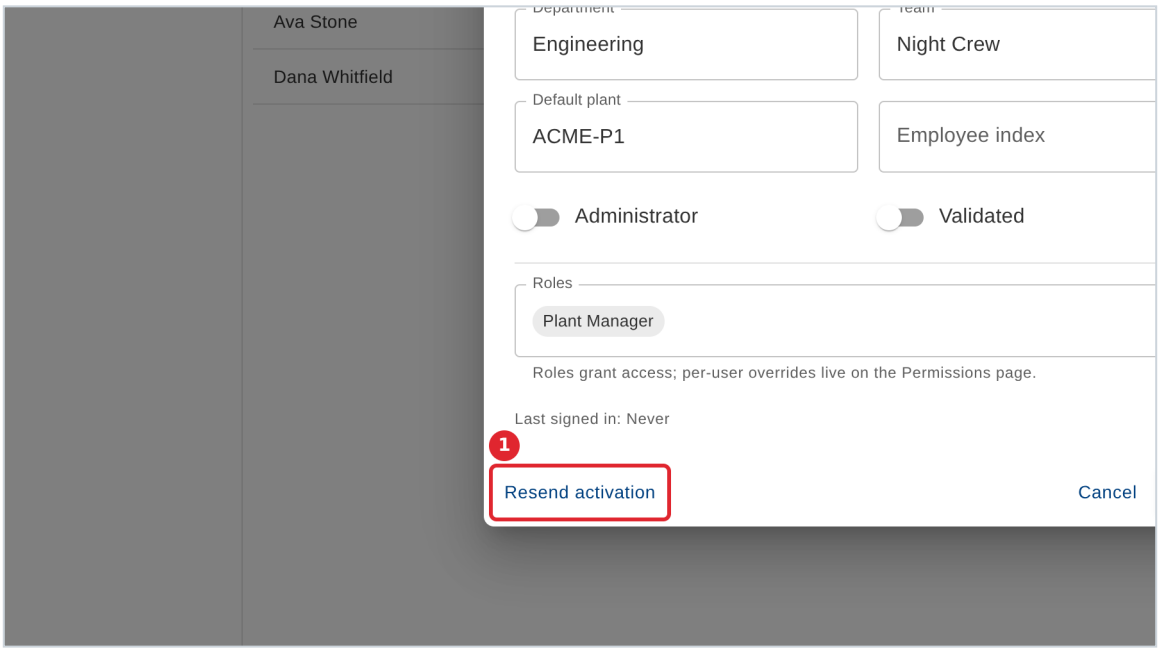
Step 1. Find the person and select the pencil icon in their row.



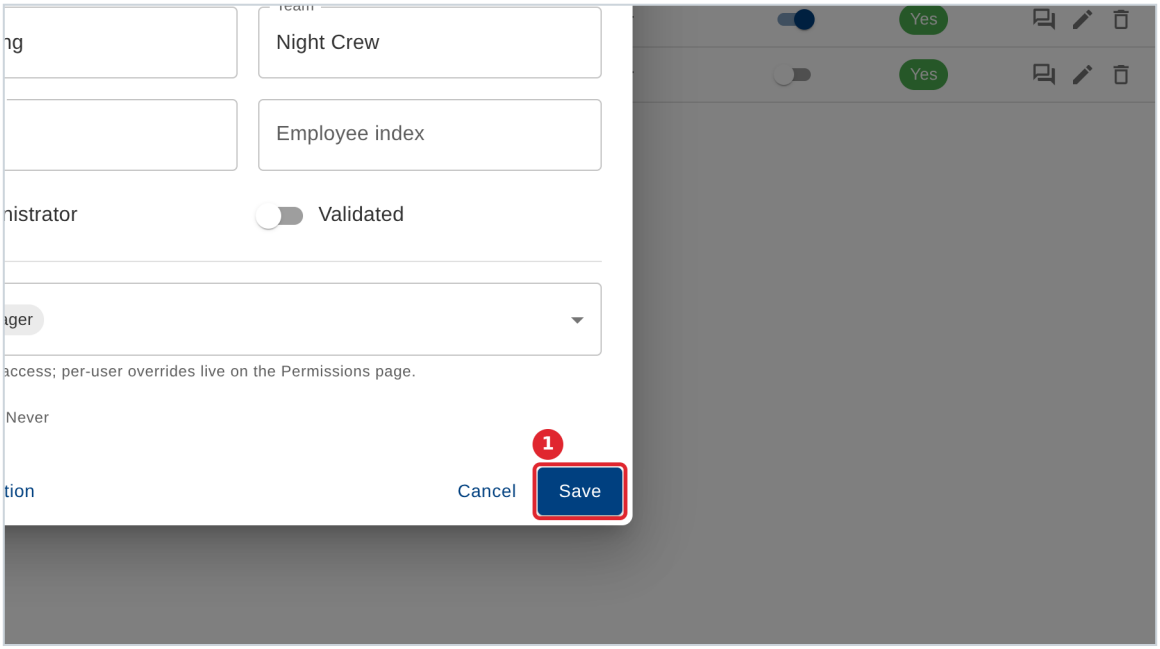
Step 2. Change any of the details. Department, Team and Default plant suggest the entries your company has set up.



Step 3. To reset the person's password, type a new one here. Leave it blank to keep the current password.



Step 4. Select Resend activation to send the person their activation again.



Step 5. Select Save to keep your changes.

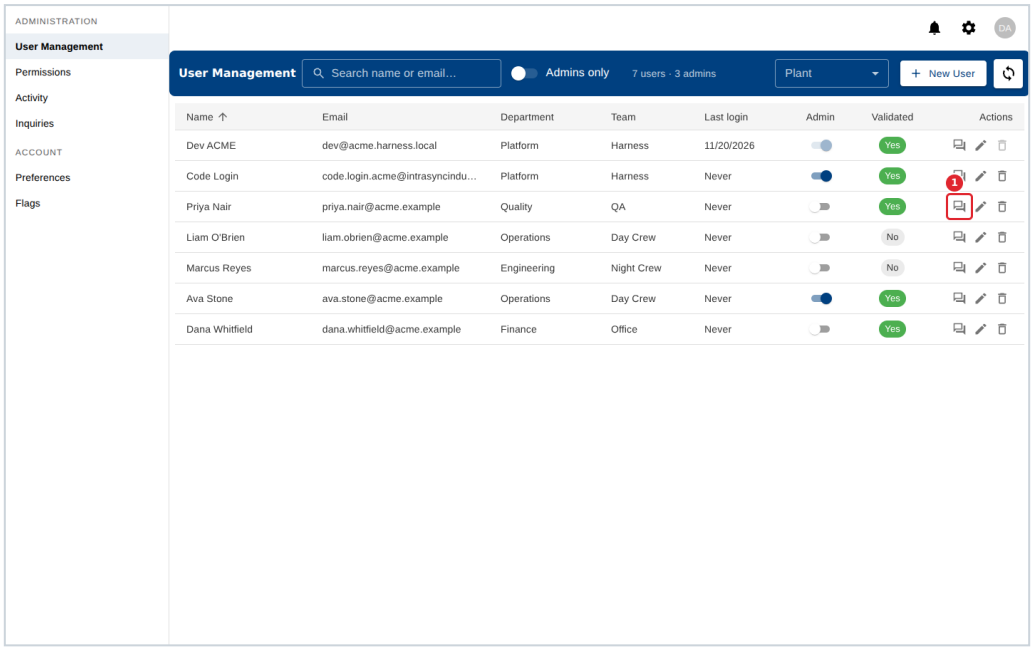
Tips:

- Typing a password in Reset password replaces the person's password as soon as you save.
- The form shows when the person last signed in.
- Roles can also be changed here. Changes to one person's access that go beyond their roles are made on the Permissions page.

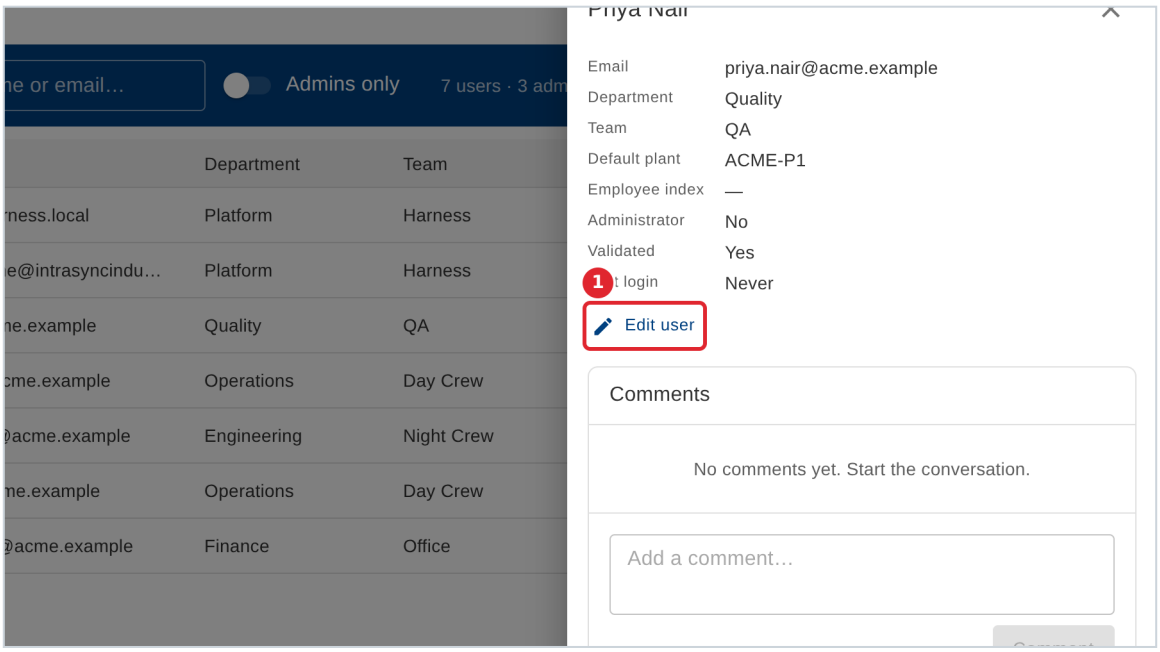
This is shown in the Core video at 0:29.

5. Keep comments, tags and files on a person

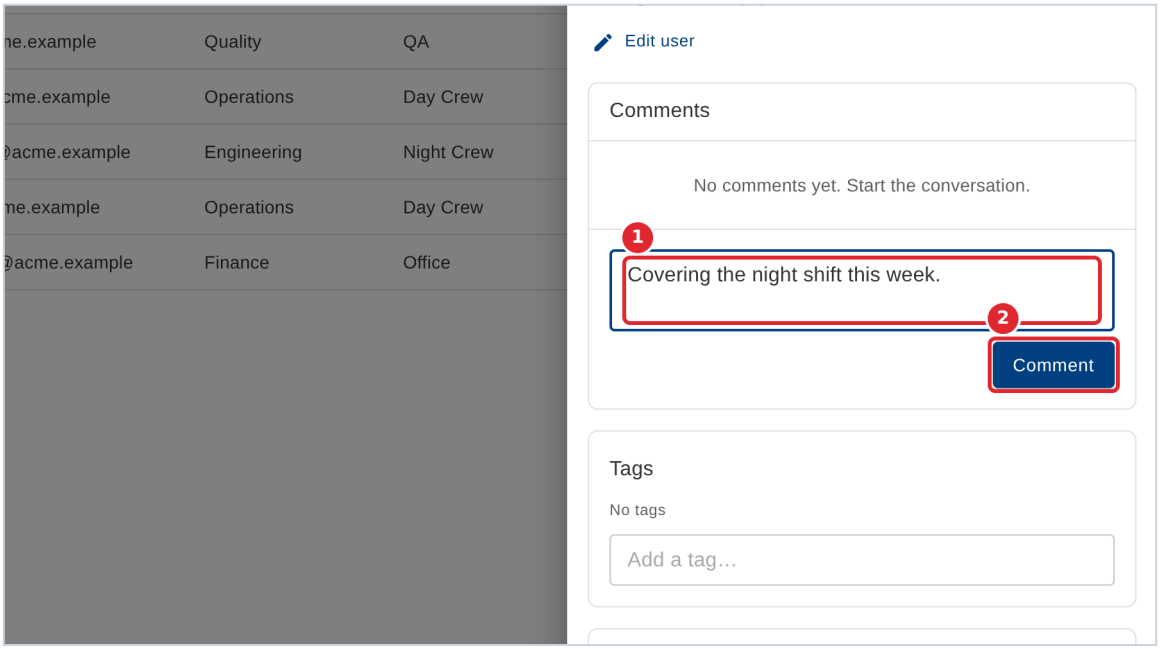
Record notes about a person, label them with tags, and keep documents with them, so the whole team sees the same information.



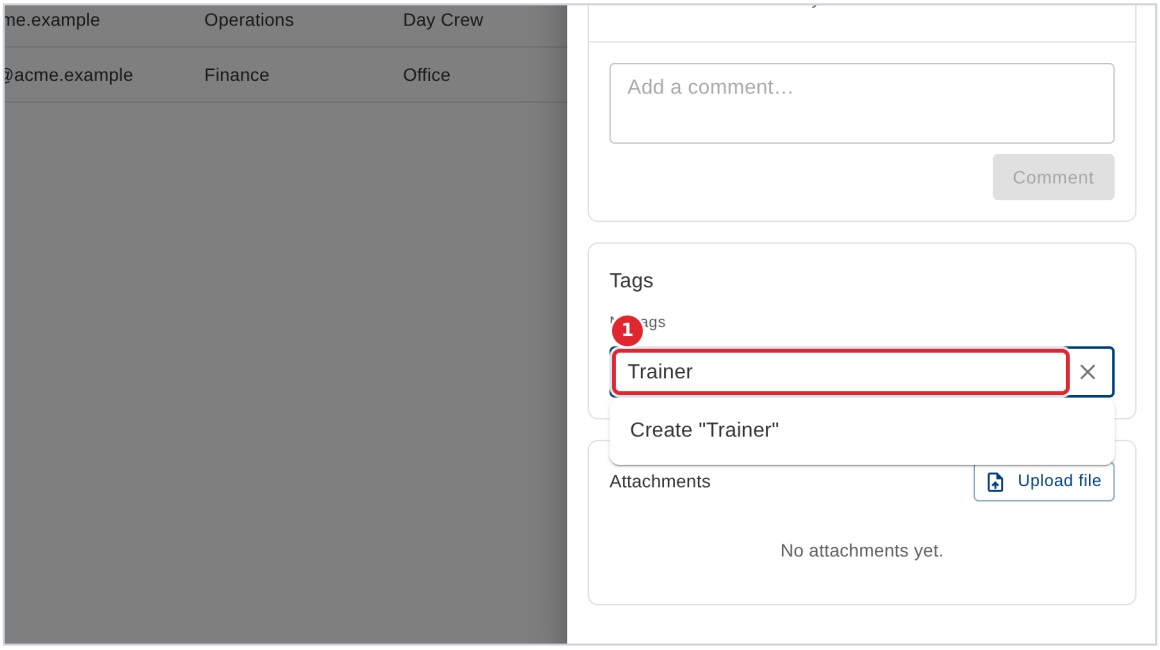
Step 1. Select the details icon in a person's row.



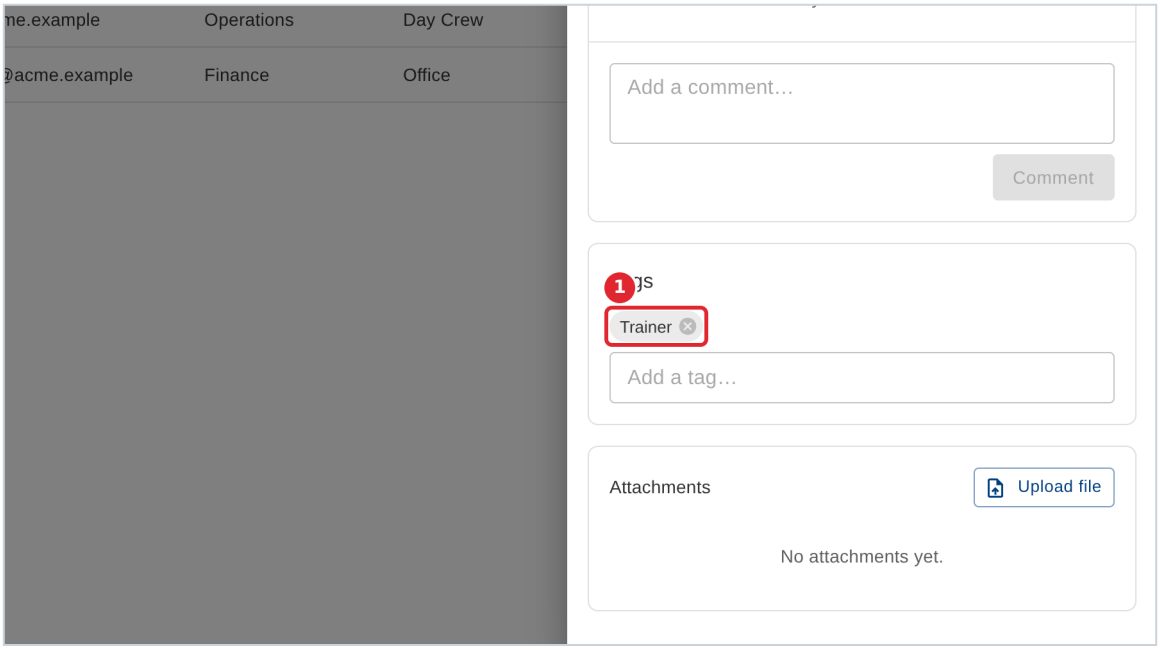
Step 2. The drawer shows the person's details, with Edit user to change them.



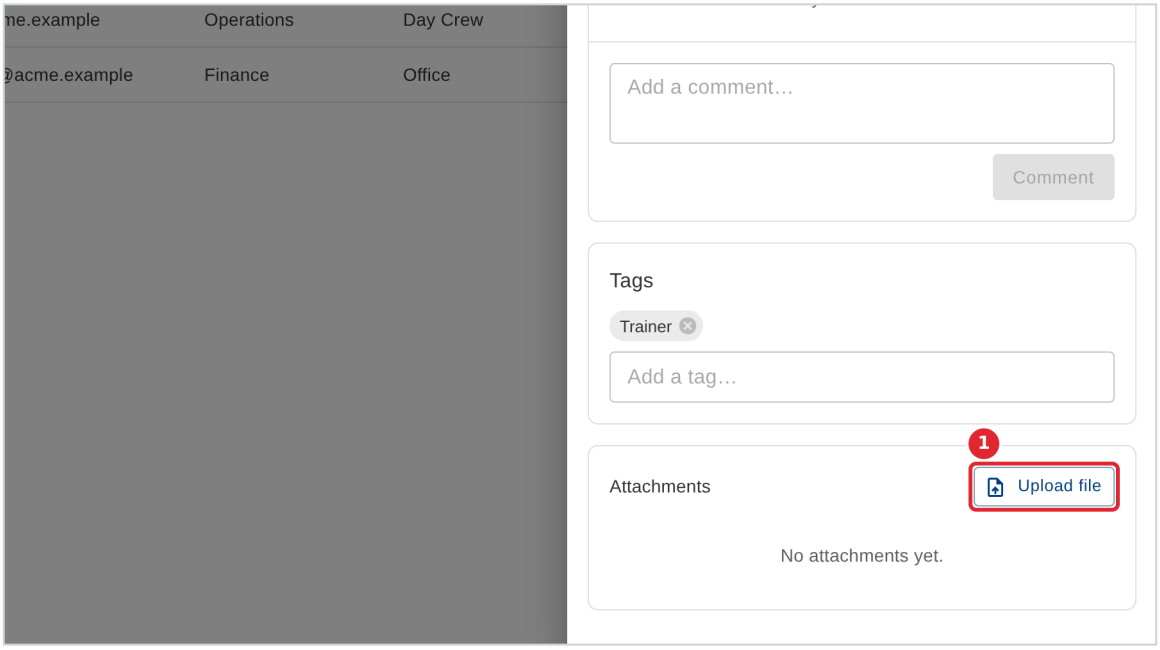
Step 3. Type a comment, then select Comment.



Step 4. To tag the person, type in Add a tag. Pick an existing tag, or choose Create to make a new one.



Step 5. The tag is added. Select the x on a tag to remove it from this person.



Step 6. Select Upload file to attach a document to the person.

– Step 7. Select the x at the top of the drawer to close it.

Tips:

– Only the person who wrote a comment can edit or delete it. A deleted comment is replaced by a note saying it was deleted.
– Removing a tag from a person keeps the tag, so it can still be used on other records.
– Deleting an attachment cannot be undone.

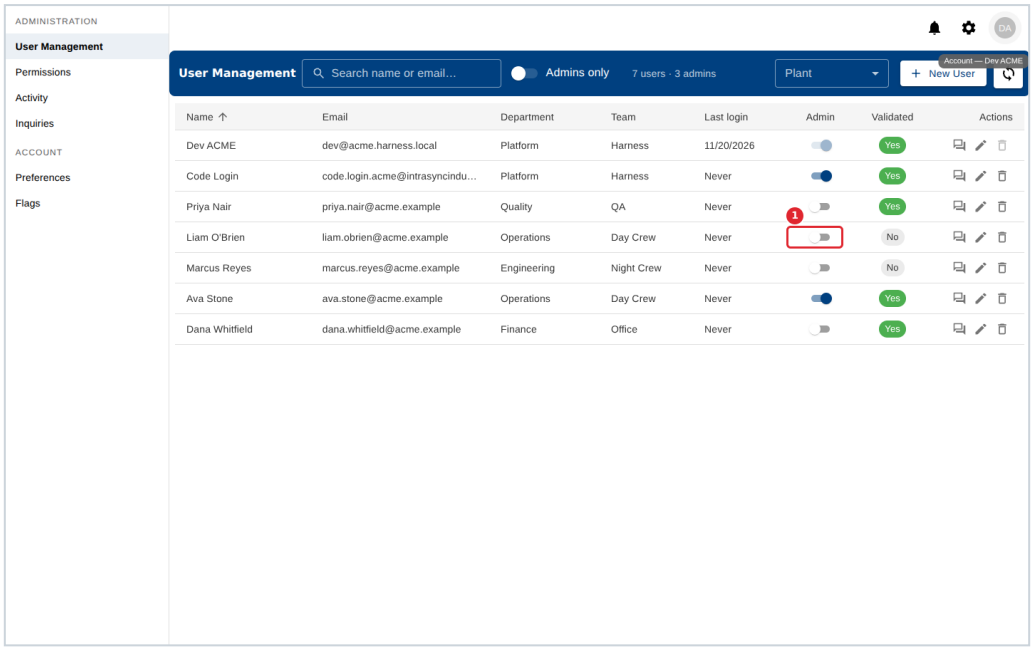
This is shown in the Core video at 0:37.

6. Make someone an administrator, or remove it

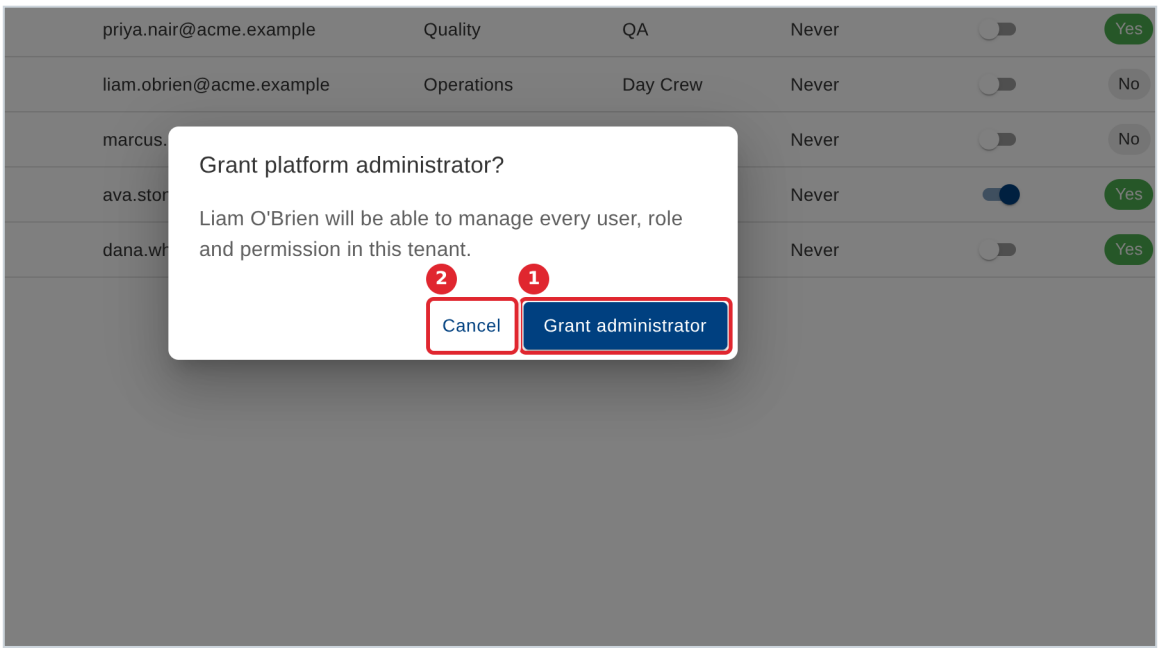
Decide who may manage users, roles and permissions for your company.

Before you start:

– You are an administrator.



Step 1. In User Management, use the switch in the Admin column.



Step 2. Confirm. An administrator can manage every user, role and permission in your company.

Tips:

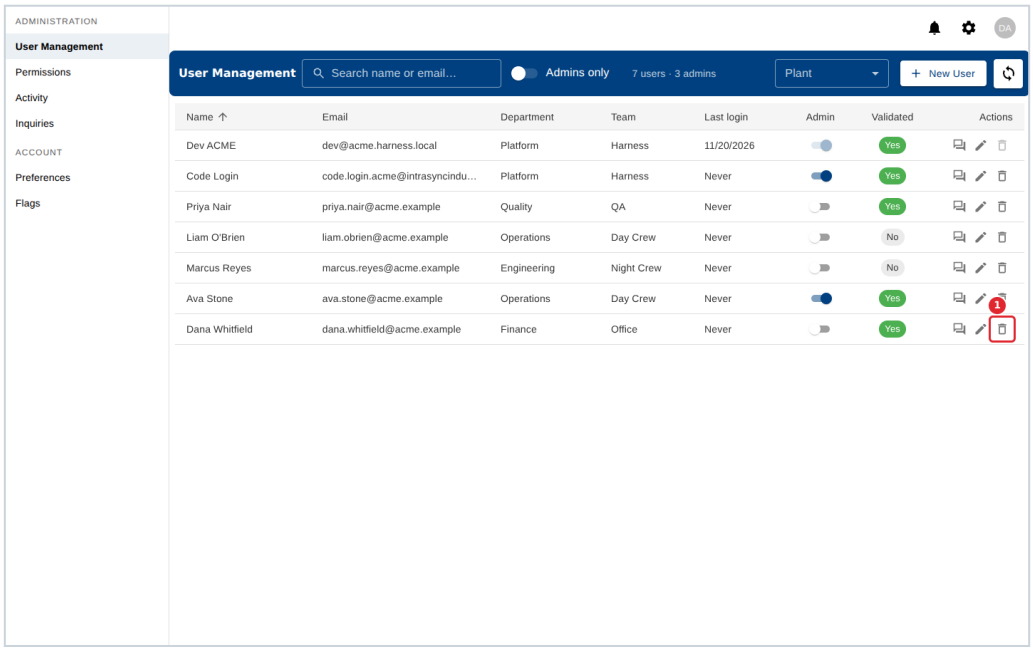
- Removing administrator access takes effect immediately.
- You cannot remove your own administrator access, and you cannot remove the last administrator your company has.

7. Remove a person

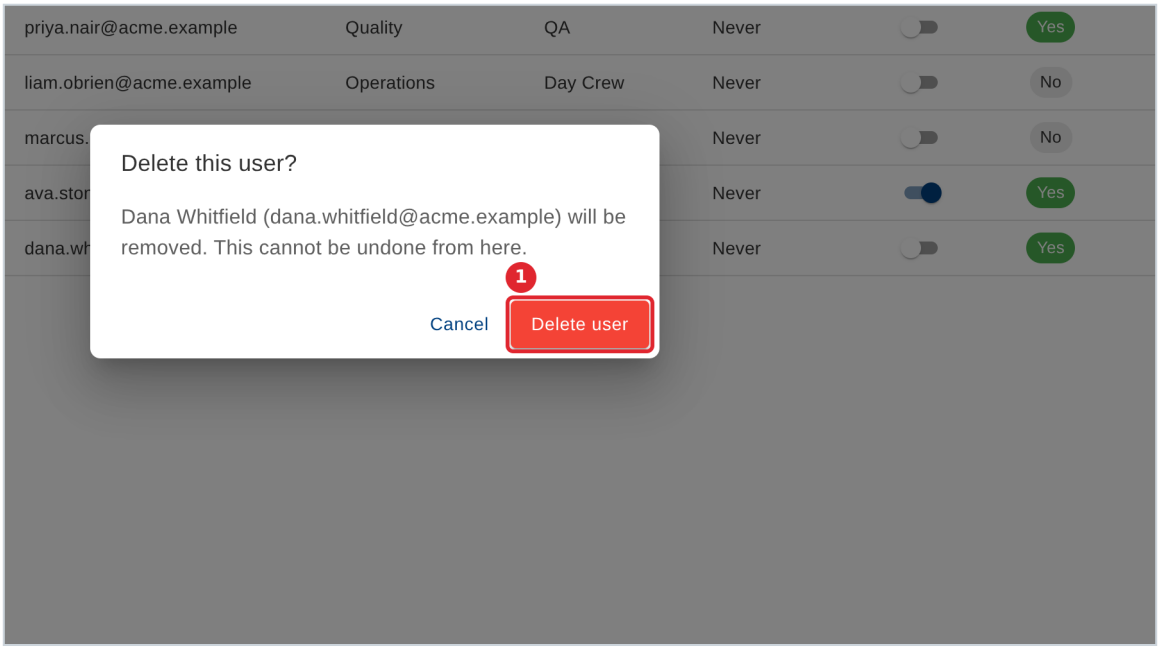
Take away the sign-in of someone who has left.

Before you start:

- You are an administrator.



Step 1. Select the bin icon in the person's row.



Step 2. Select Delete user to confirm. This cannot be undone.

Tips:

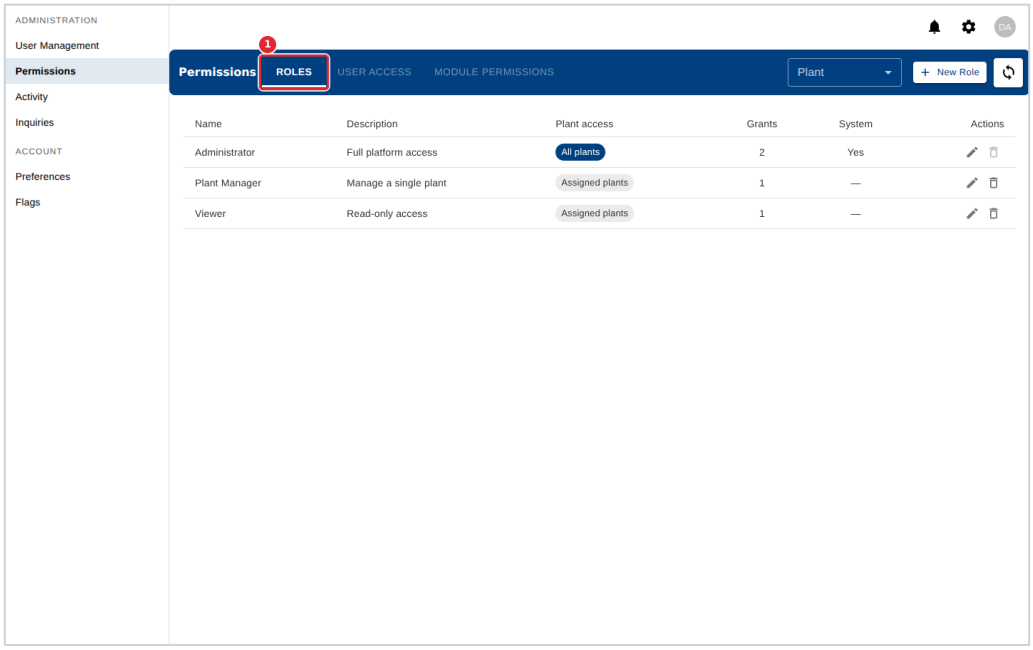
- You cannot delete yourself or your company's last administrator.
- Select Cancel if you opened the confirmation by mistake.

8. Create a role

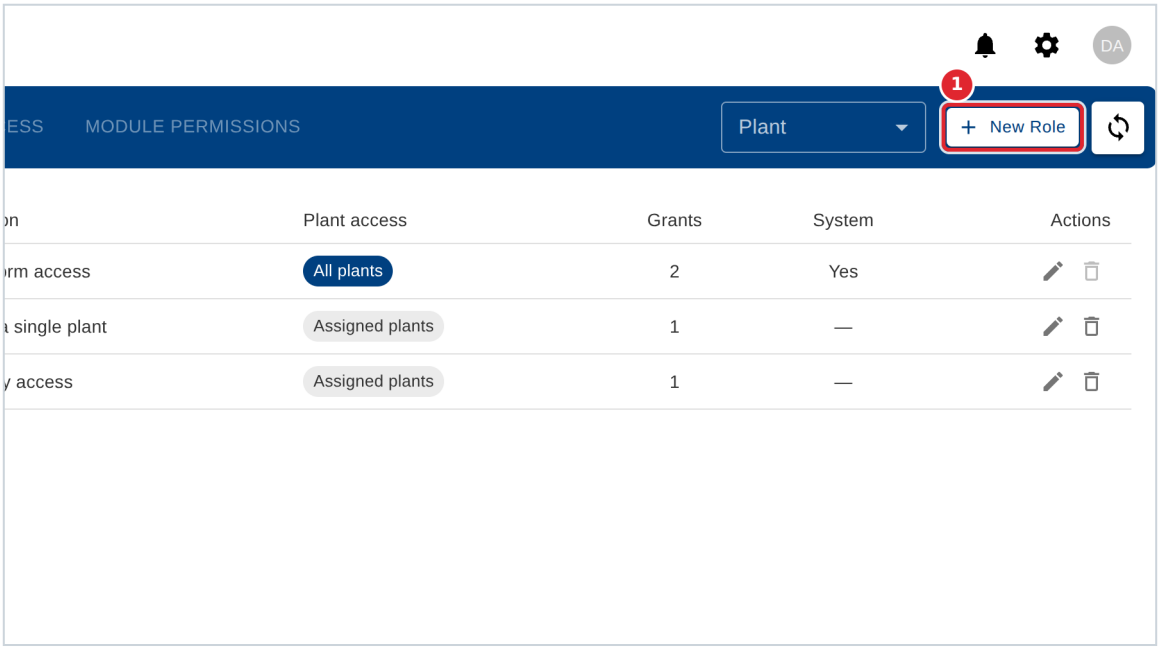
Describe a job once, with the access it needs, and give it to everyone who does that job.

Before you start:

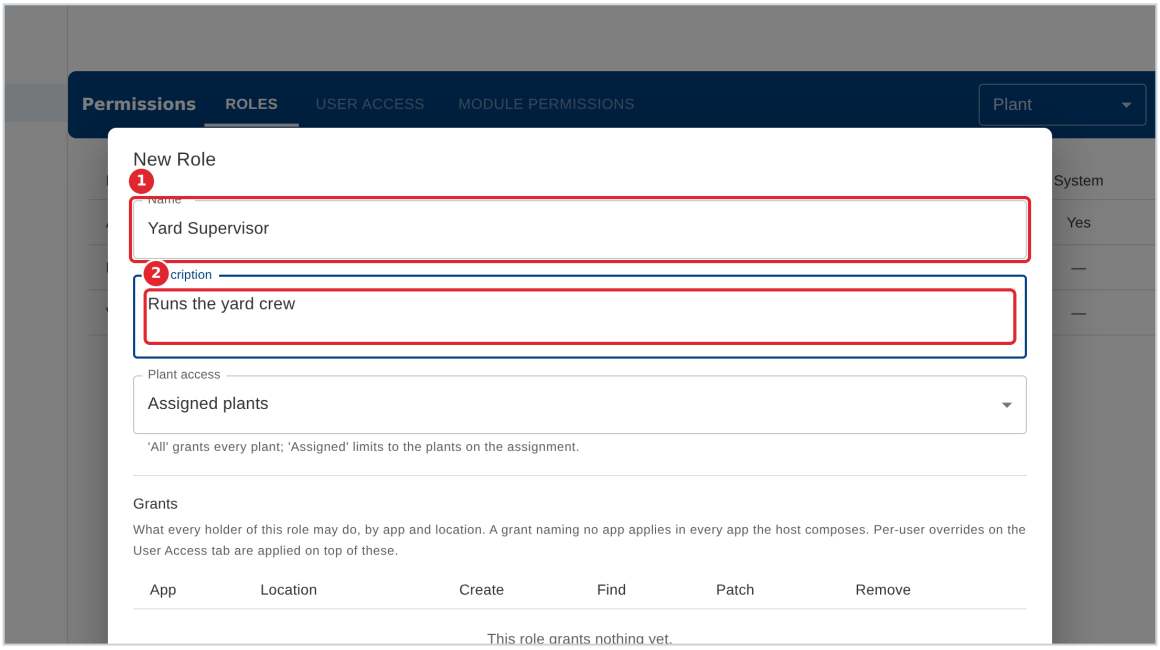
- You are an administrator.



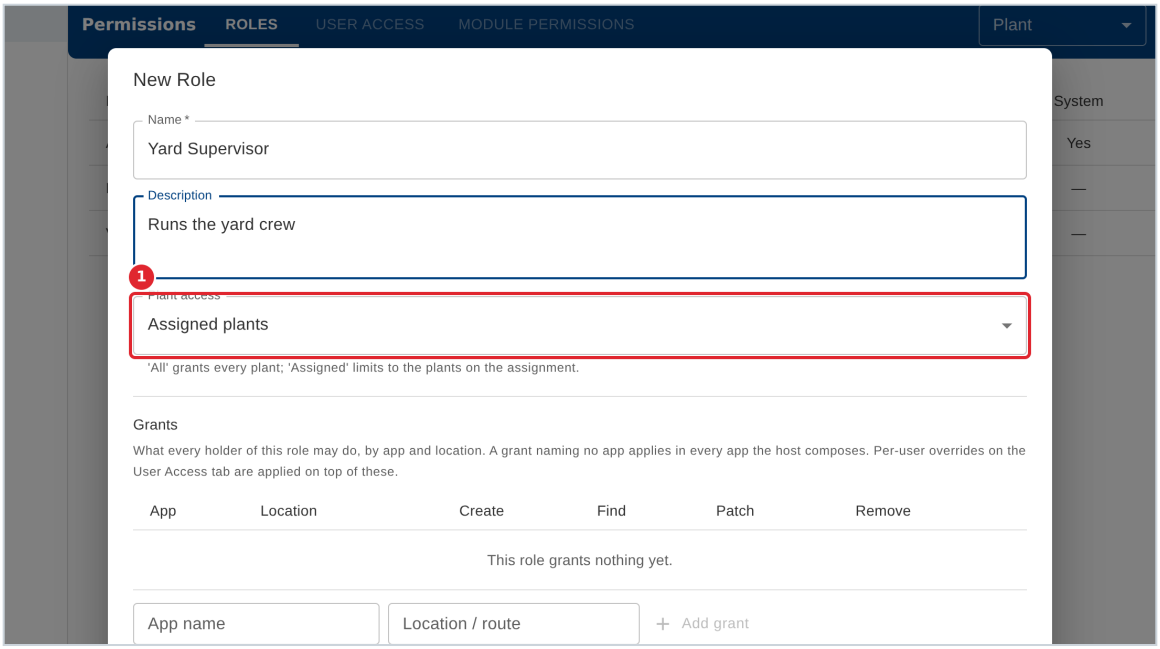
Step 1. Open Permissions. The Roles tab lists your company's roles and what each one grants.



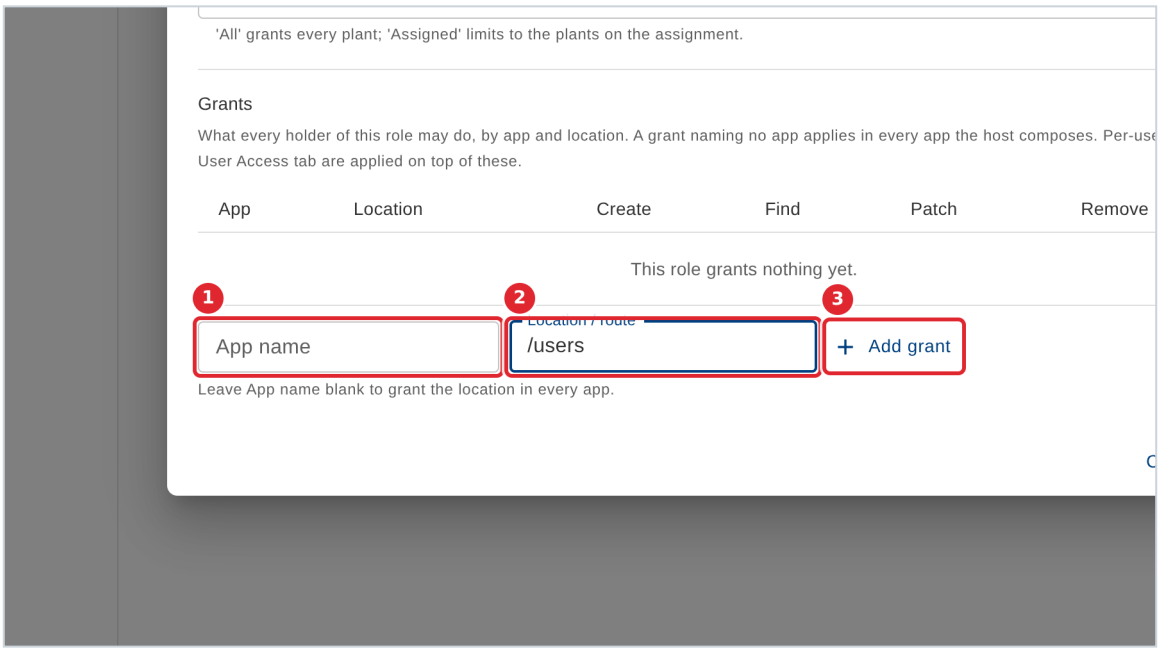
Step 2. Select New Role.



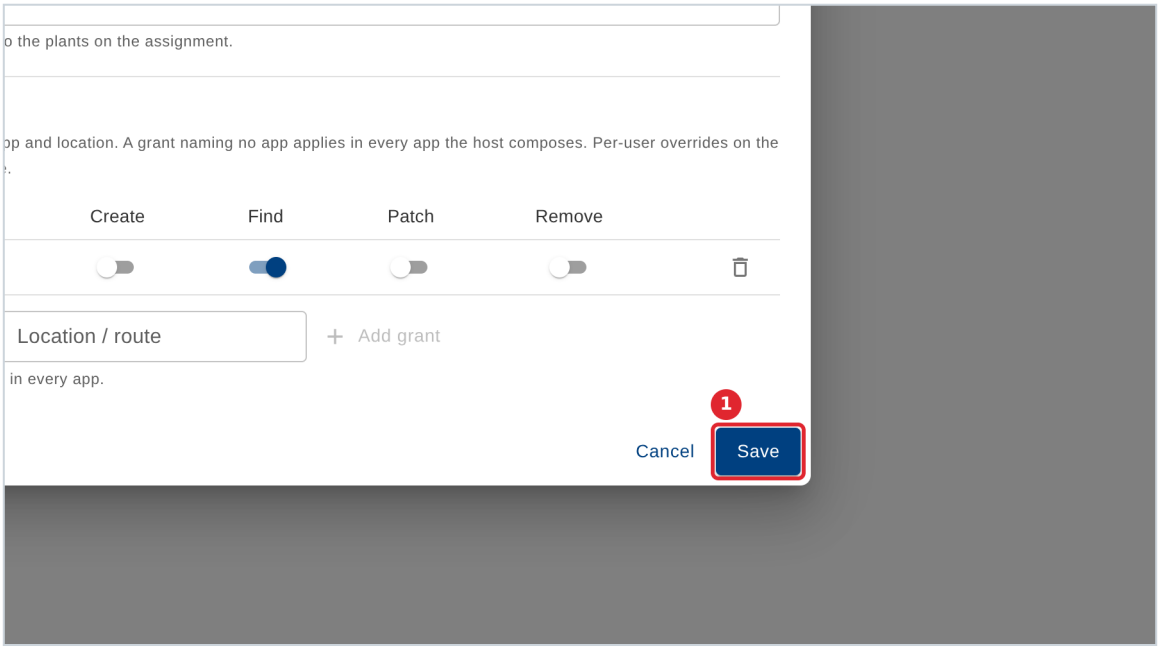
Step 3. Give the role a Name (required) and a Description.



Step 4. Choose Plant access: All plants, or only the plants on each person's assignment.



Step 5. Add a grant: type the location, leave App name blank to grant it in every app, then select Add grant.



Step 6. Turn on Create, Find, Patch or Remove for the grant, then select Save.

Tips:

- Save stays unavailable until the role has a Name.
- A location is the page or area the grant covers, such as the address of a page in the app.
- If the role already grants that location, the form says so: change the existing row instead of adding a second one.
- Changes to a role reach each person the next time they sign in.

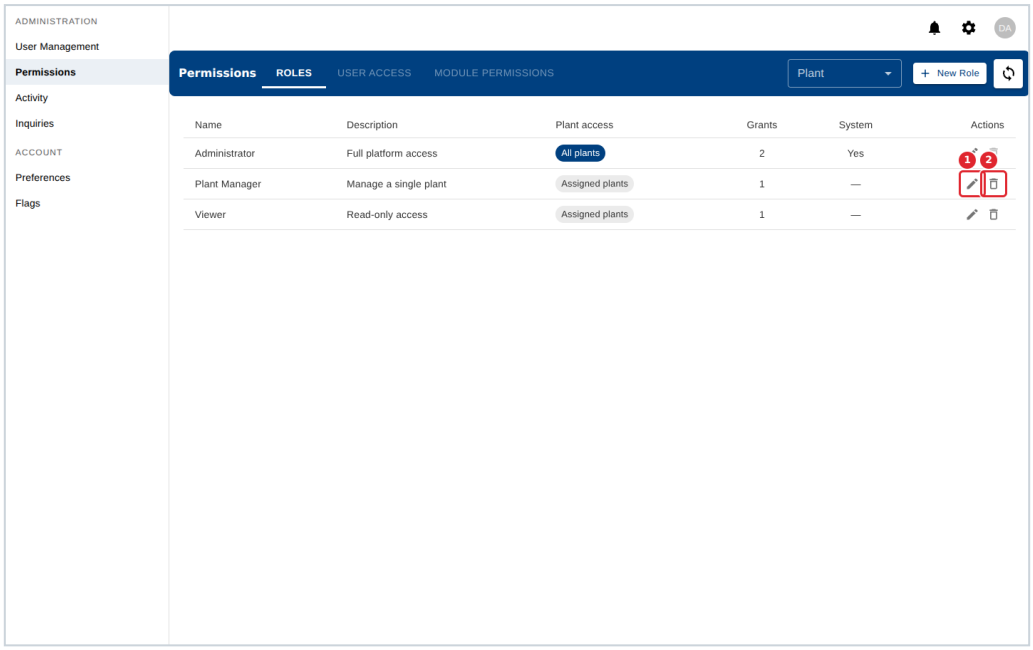
This is shown in the Core video at 0:48.

9. Change or delete a role

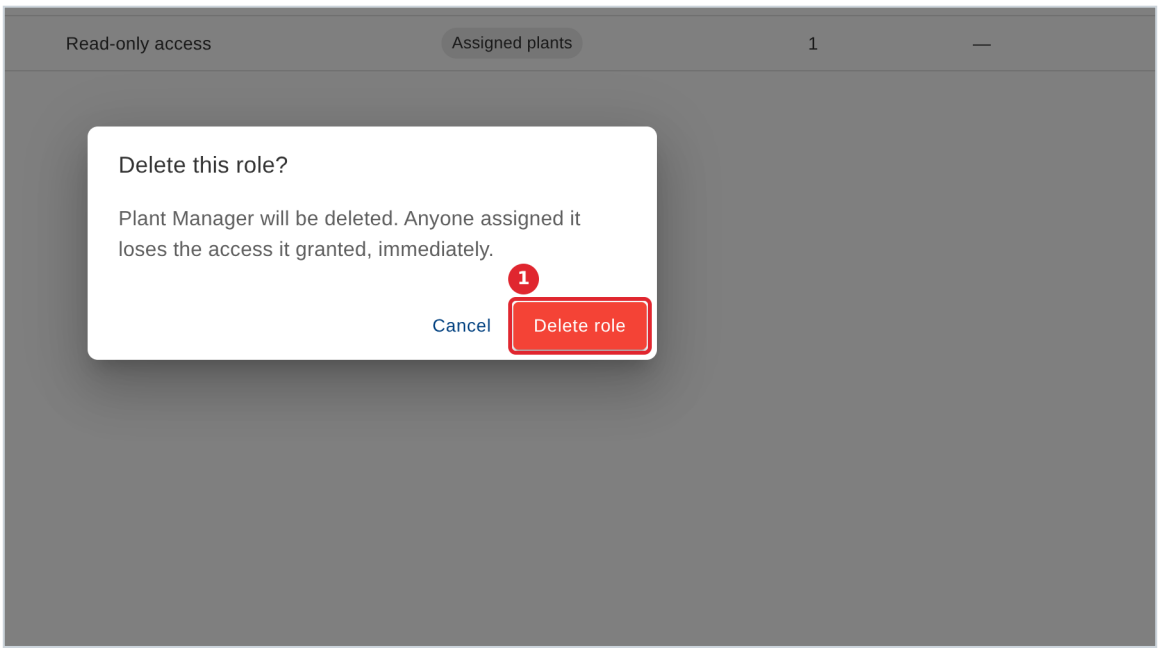
Adjust what a job may do as your processes change, or retire a role nobody uses.

Before you start:

– You are an administrator.



Step 1. Select the pencil icon to change a role, or the bin icon to delete it.



Step 2. Deleting asks first. Everyone assigned the role loses its access at once.

Tips:

– System roles are part of the platform and cannot be deleted. Their bin icon is unavailable.

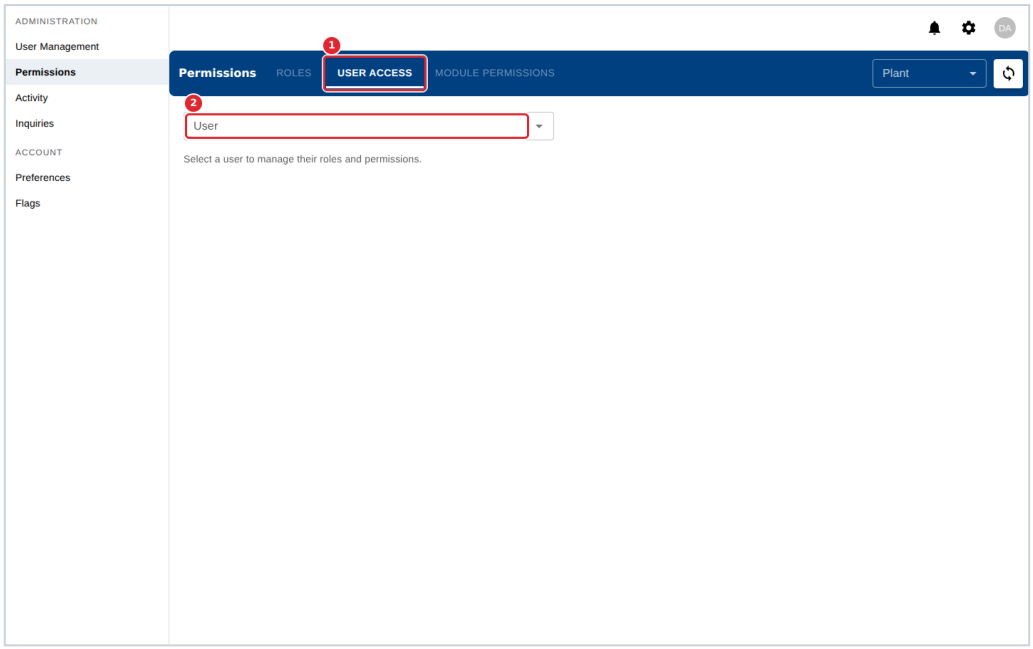
This is shown in the Core video at 0:44.

10. Give a person a role

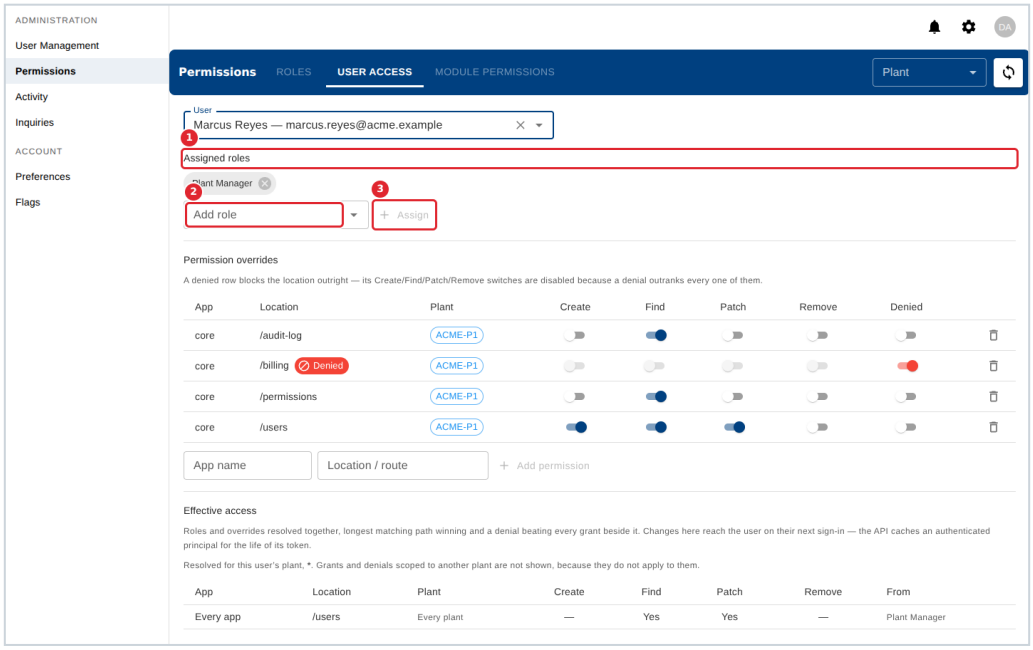
Grant someone the access of a job by assigning its role, rather than setting each permission by hand.

Before you start:

- You are an administrator.
- The role already exists (see Create a role).



Step 1. Select the User Access tab, then pick a person in the User box.



Step 2. Assigned roles lists the person's roles. To add one, choose it in Add role and select Assign. Select the x on a role to unassign it.

Tips:

- Unassigning a role asks you to confirm, and the access it granted is withdrawn immediately.
- If the User list is long, keep typing a name or email to narrow it.

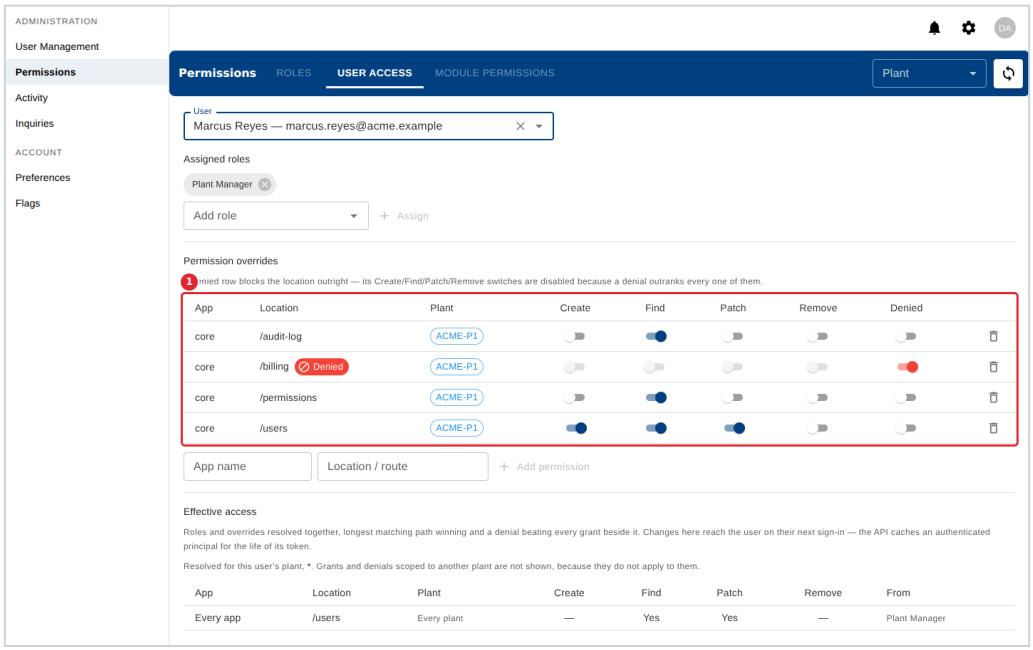
This is shown in the Core video at 0:56.

11. Allow or block one person's access to a page

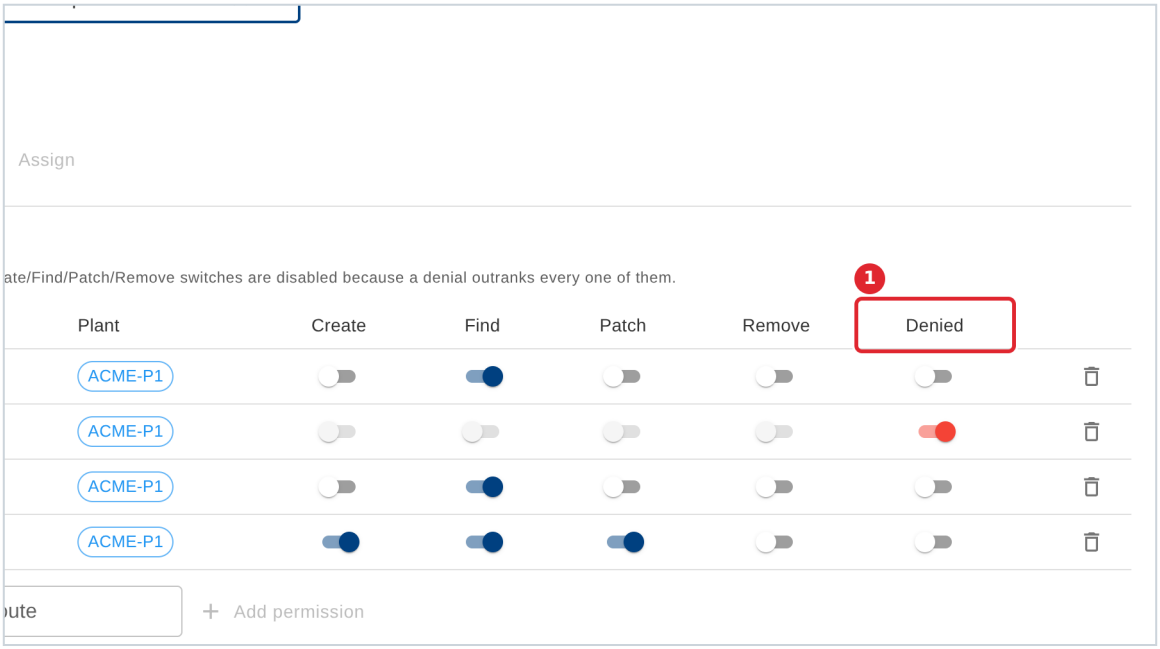
Make an exception for one person without changing the role everyone else shares.

Before you start:

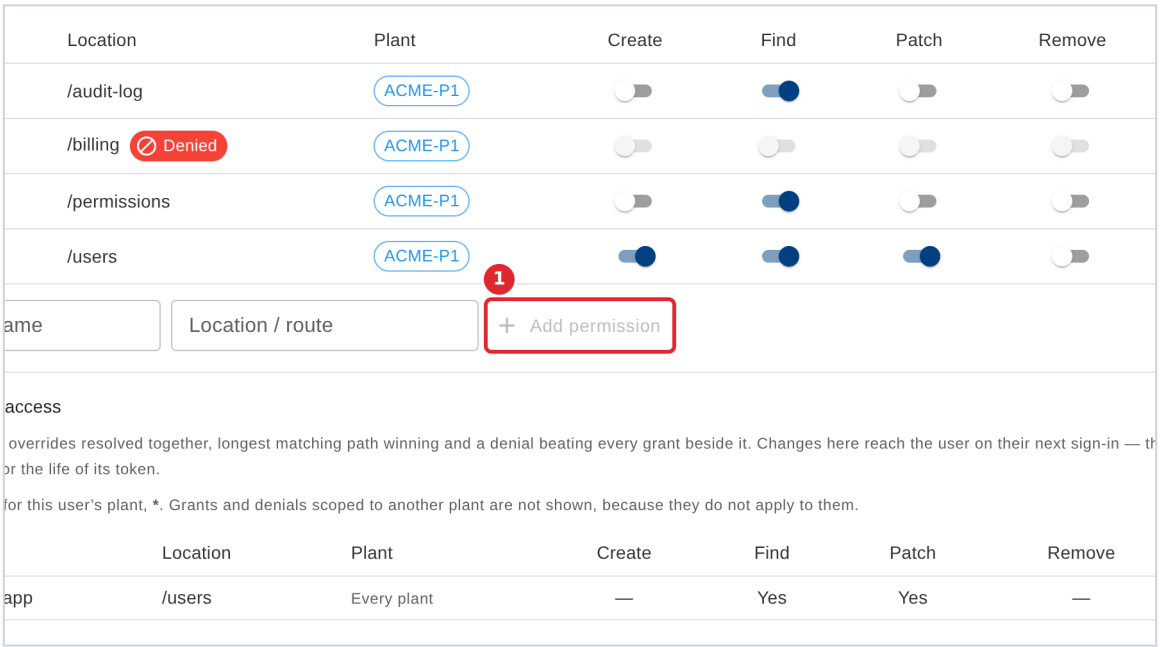
- You are an administrator.
- The person is selected on the User Access tab.



Step 1. Permission overrides change what one person can do, on top of their roles.



Step 2. Use the switches to allow Create, Find, Patch or Remove. Turn on Denied to block the location outright.



Step 3. To add an override, enter the App name and Location, then select Add permission.

– Step 4. To remove an override, select the bin icon at the end of its row and confirm. The person falls back to what their roles allow.

Tips:

– A row with Denied turned on blocks the location outright, so its other switches are unavailable. Turn Denied off to use them.
– If an override for that location already exists, the form says so: change that row instead.
– Changes reach the person the next time they sign in.

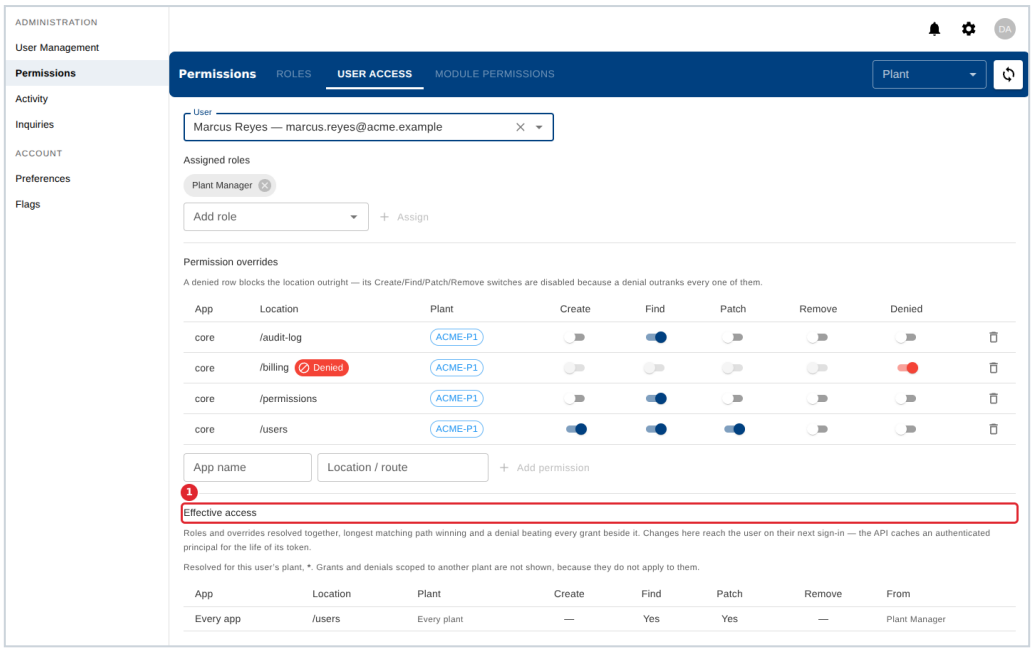
This is shown in the Core video at 0:56.

12. Check what a person can actually do

Answer the question "why can (or can't) this person open that page?" without adding up roles and overrides yourself.

Before you start:

– The person is selected on the User Access tab.



Step 1. Effective access shows what the person can actually do, after roles and overrides are combined. From names the grant that decides.

Tips:

– Every app means the grant applies in all of your apps.
– A Denied chip beside a location means the person is blocked there.

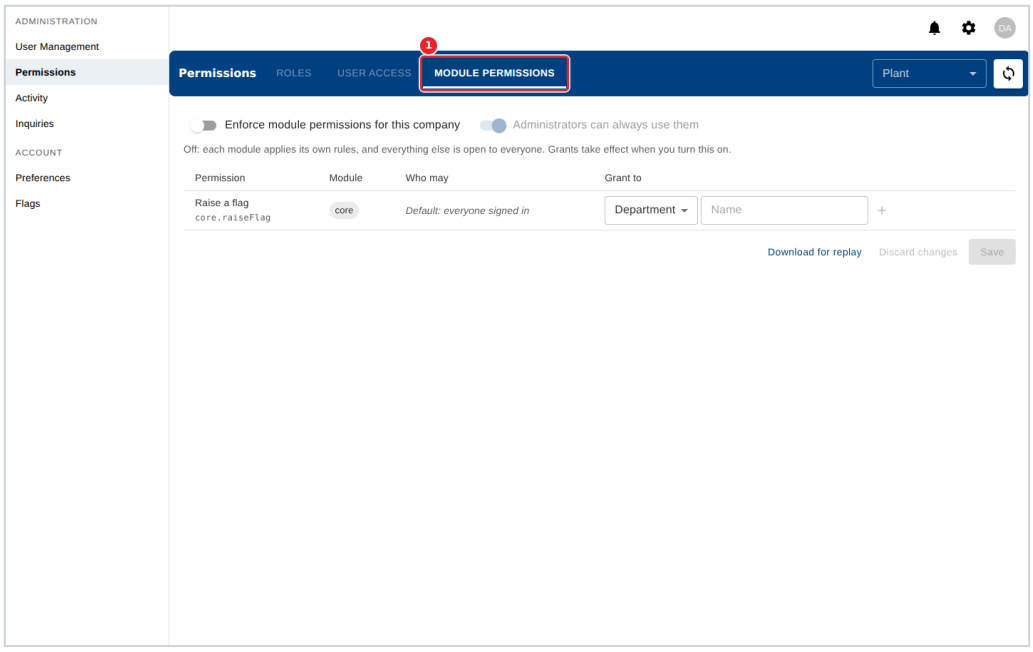
This is shown in the Core video at 1:06.

13. Decide who may use each module's permissions

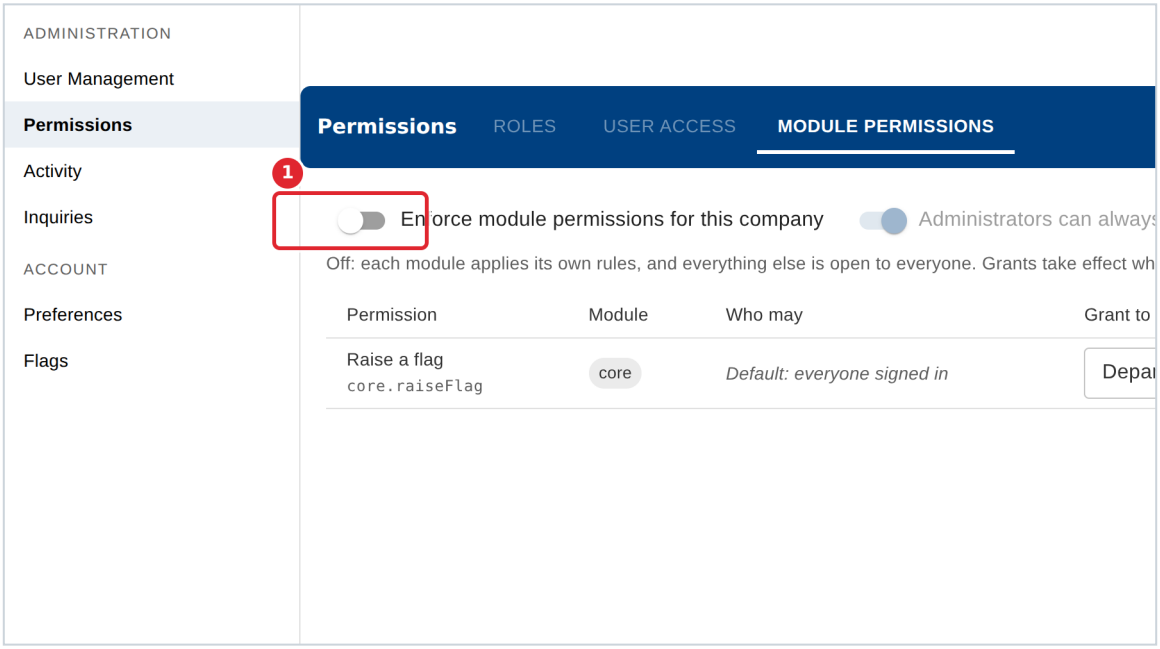
Some modules declare permissions of their own, such as raising a flag. Here you decide who may use them in your company.

Before you start:

– You are an administrator.



Step 1. Select the Module Permissions tab to decide who may use each permission other modules declare.



Step 2. Turn on Enforce module permissions for this company, grant each permission to a role, department or person, then select Save.

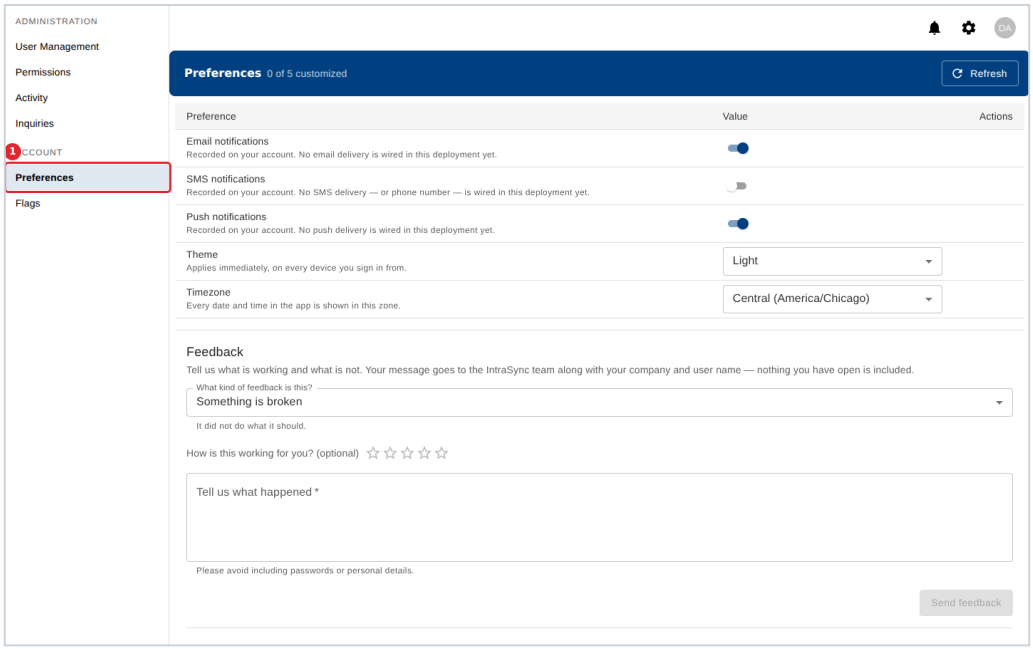
– Step 3. Select Discard changes to undo what you have not saved yet.

Tips:

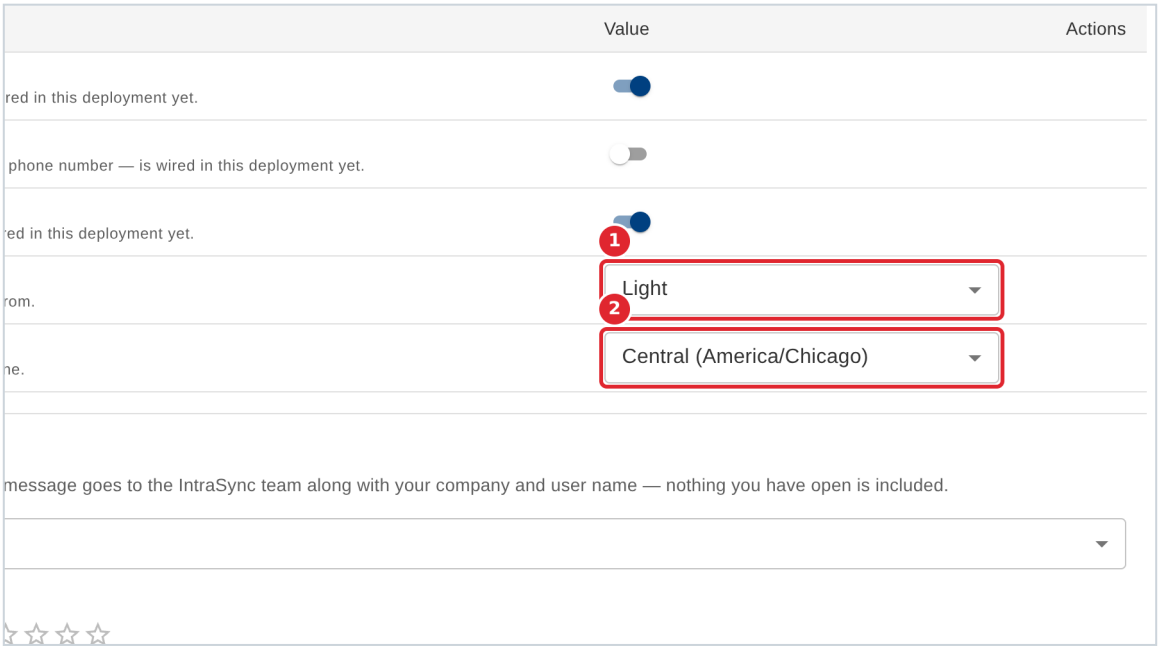
- While enforcement is off, each module applies its own rules and grants you add take effect only when you turn it on.
- A permission with no grants uses its default, shown in the Who may column.

14. Set your own preferences

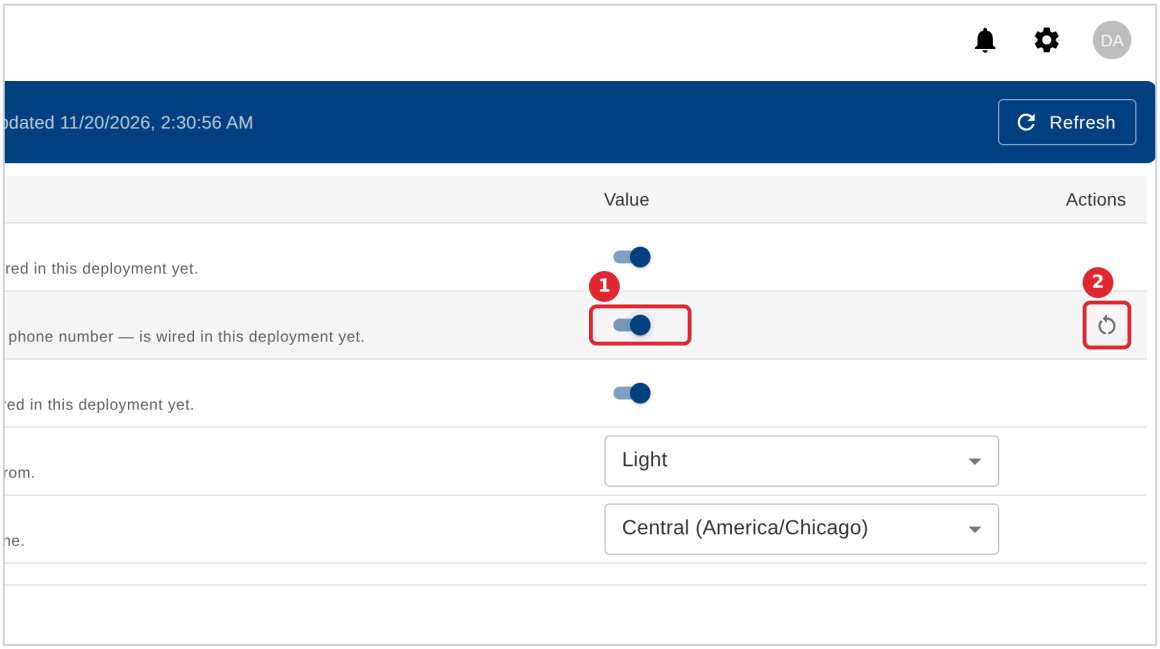
Choose how the app looks and which timezone it shows times in, for you alone.



Step 1. Open Preferences. Every setting here is your own.



Step 2. Choose a Theme and a Timezone. Every date and time in the app is shown in your timezone.



Step 3. Changes save at once. Select the reset icon on a row to put it back to its default.

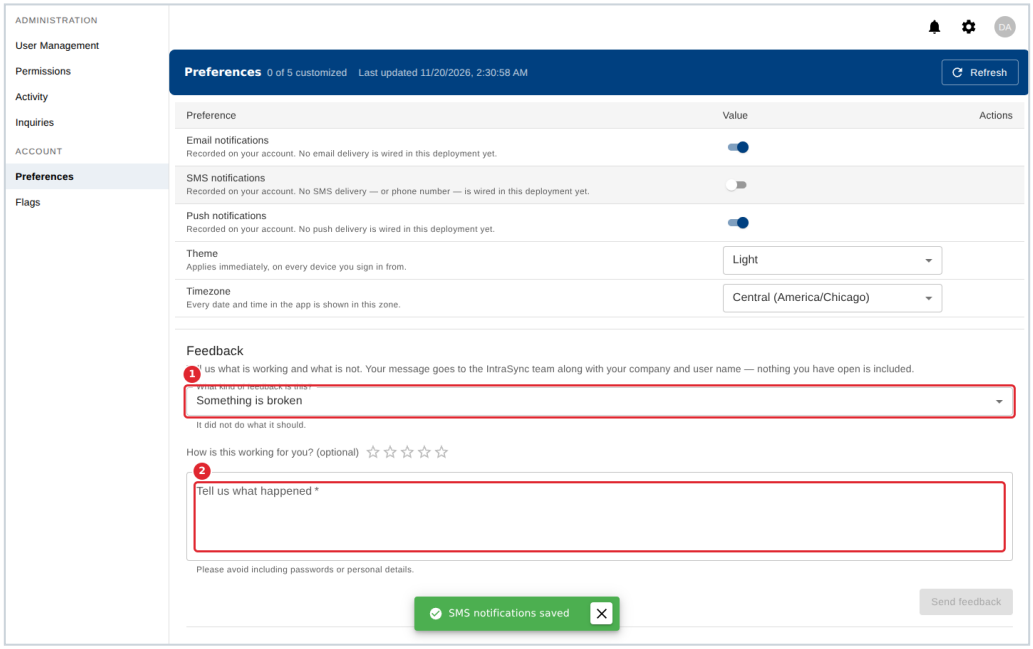
Tips:

- Theme applies straight away, on every device you sign in from.
- The header shows how many of your settings differ from the defaults.
- The notification switches record your choice on your account.

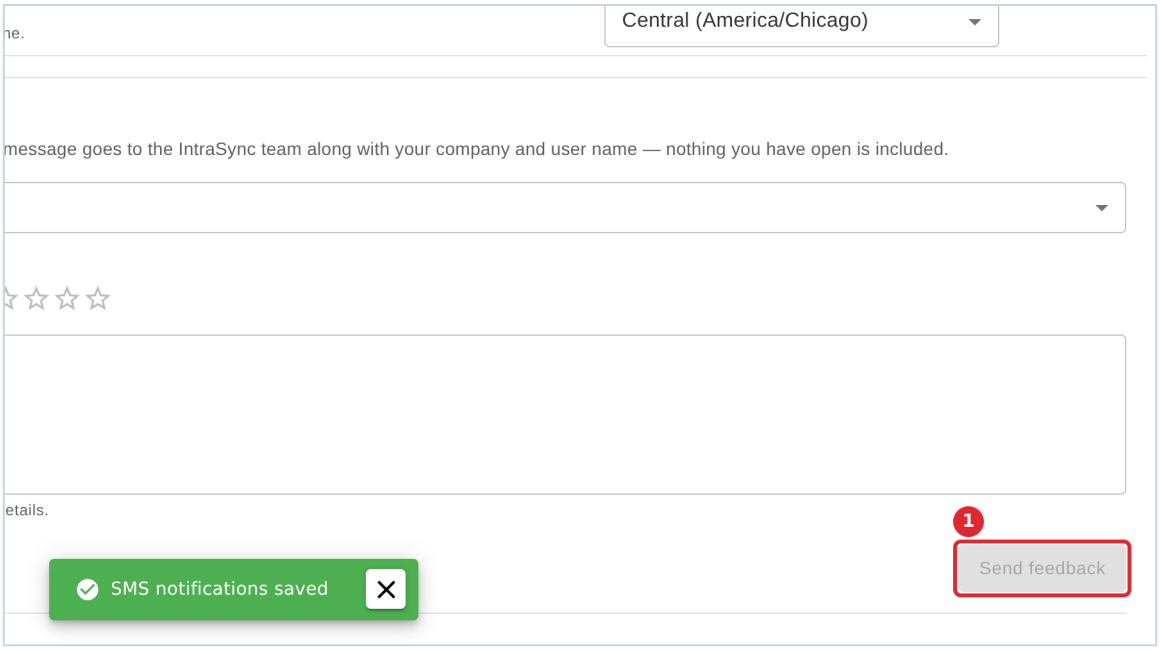
This is shown in the Core video at 1:13.

15. Send feedback to the IntraSync team

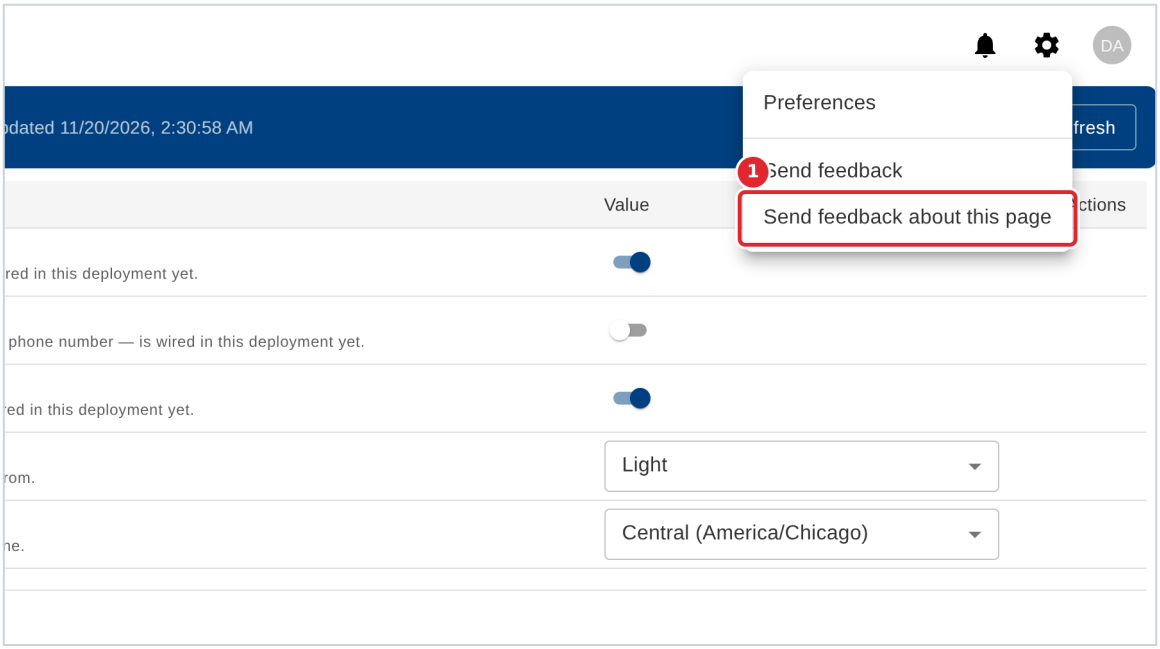
Report a problem, ask a question or suggest an improvement without leaving the app.



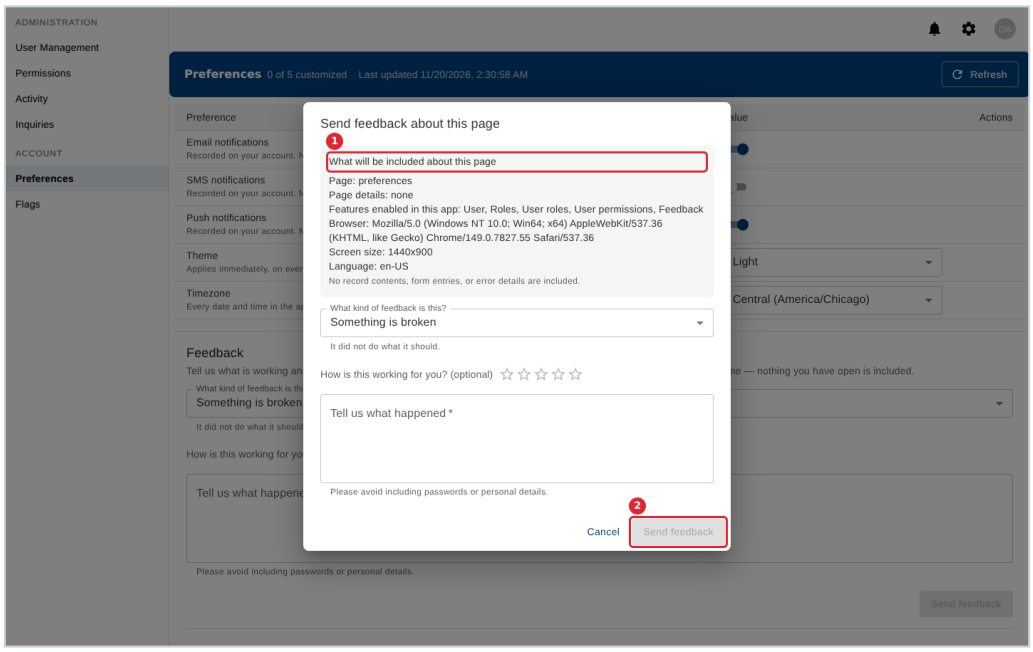
Step 1. On Preferences, scroll to Feedback. Choose what kind of feedback it is, give a rating if you like, and write your message.



Step 2. Select Send feedback. What you sent before is listed below the form.



Step 3. From any page, select the settings icon, then Send feedback about this page.



Step 4. The form lists what will be sent about the page before you send anything. Write your message and select Send feedback.

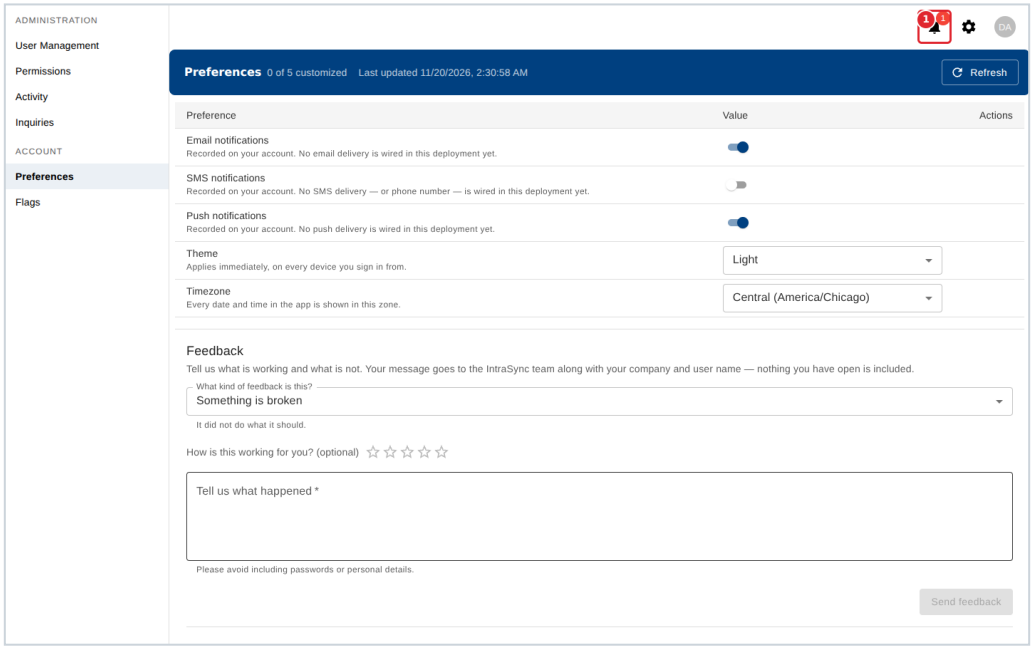
Tips:

- Tell us what happened is required. Please do not include passwords or personal details.
- Feedback sent from Preferences includes your company and user name, and nothing you have open.
- If you close the feedback form before sending, you are asked whether to discard it.

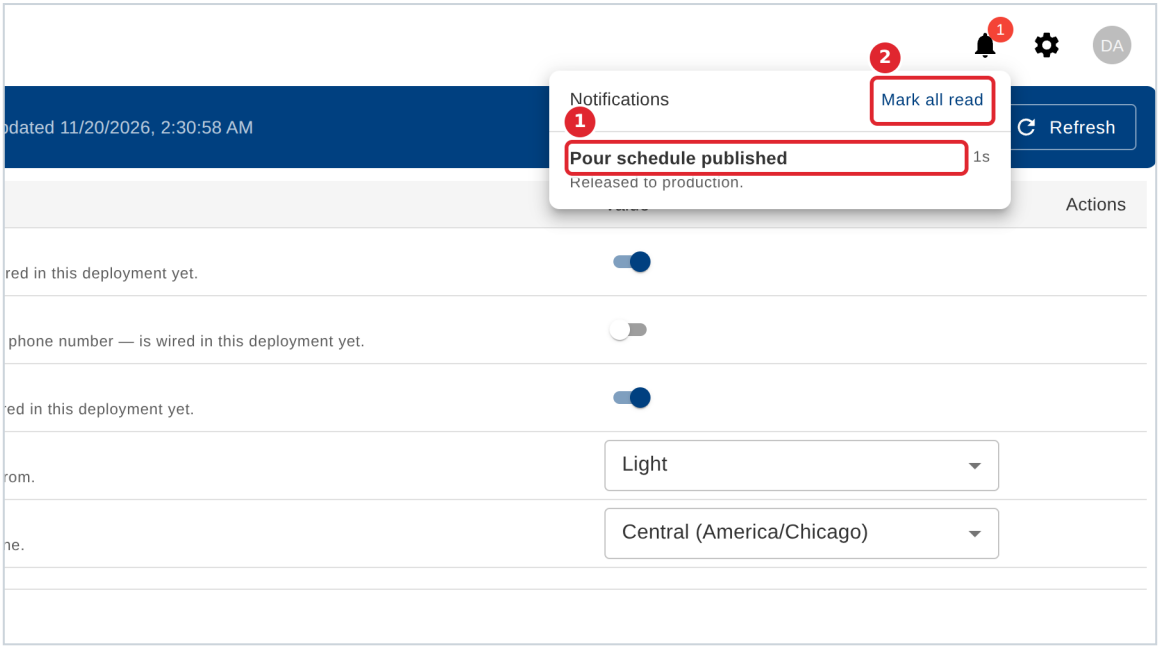
This is shown in the Core video at 1:25.

16. Read your notifications

See what other modules and people need you to know, as it happens.



Step 1. The number on the bell is how many notifications you have not read. Select the bell.



Step 2. Select a notification to open the page it is about. Select Mark all read to mark every one as read.

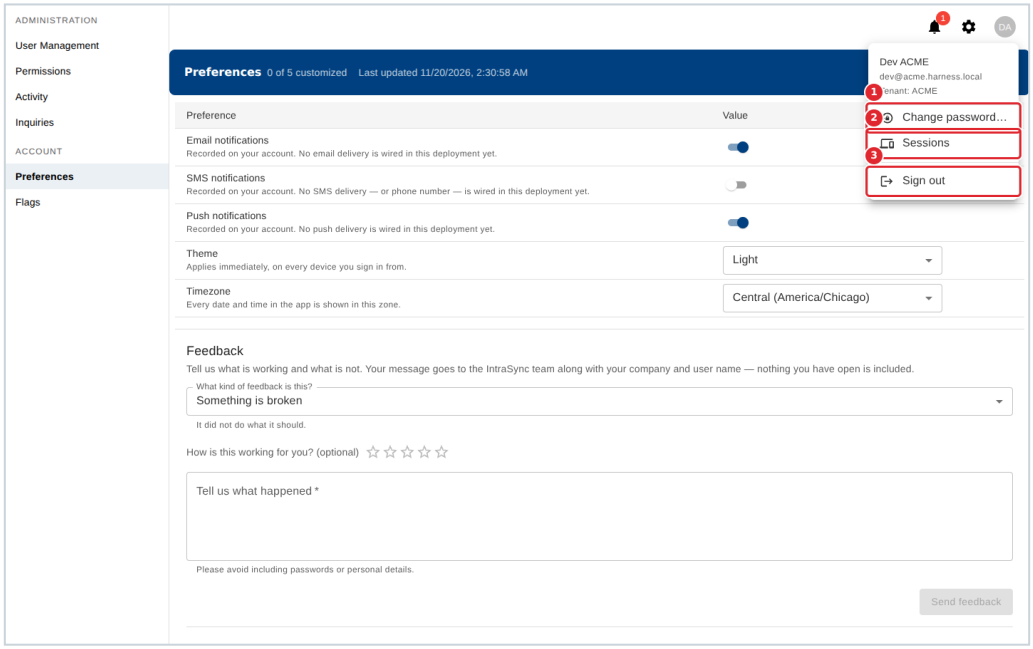
Tips:

- New notifications arrive without reloading the page.
- When you have more notifications than the list holds, it says how many it is showing.
- When nothing is unread, the list says you are all caught up.

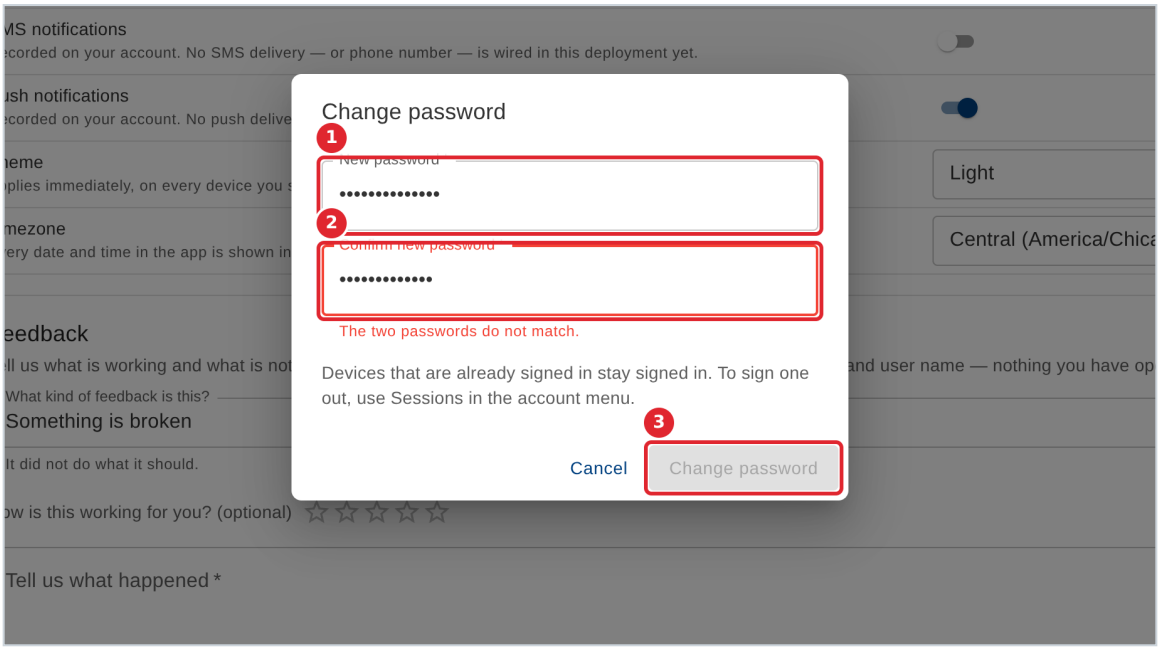
This is shown in the Core video at 1:30.

17. Change your password, sign out of other devices, or sign out

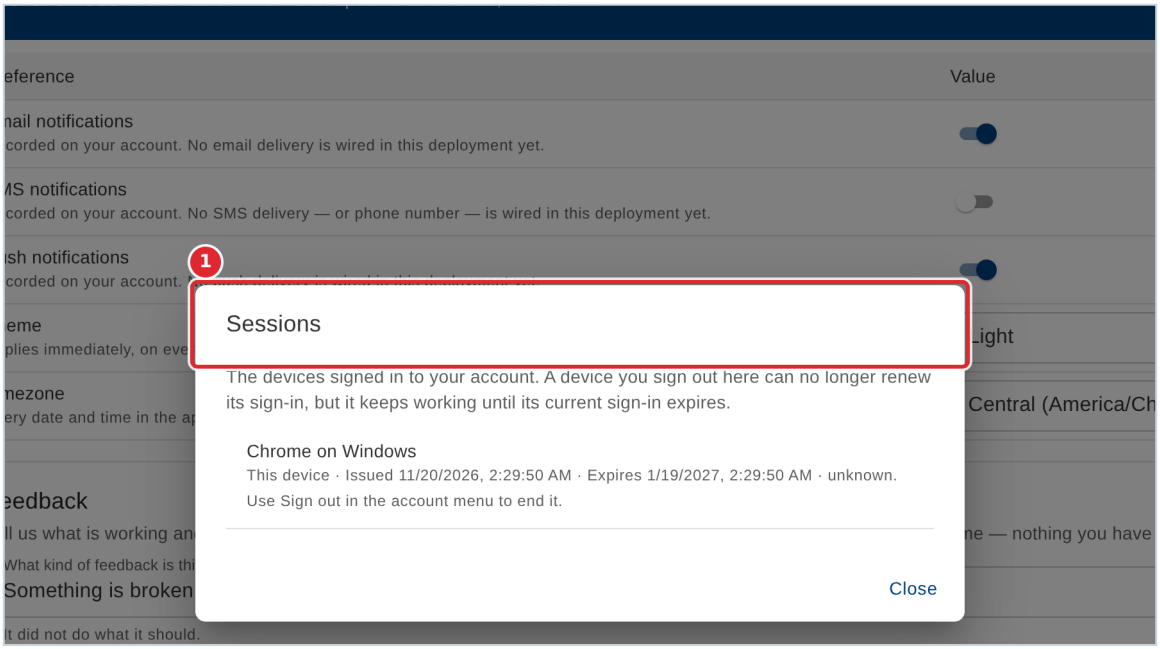
Keep your own account secure, especially on a shared computer.



Step 1. Select your initials at the top right. The menu shows who is signed in, with Change password, Sessions and Sign out.



Step 2. In Change password, type the new password twice and select Change password. If the two do not match, the form says so.



Step 3. Sessions lists every device signed in to your account. Select Sign out beside a device to end it there.

– Step 4. Select Sign out in the account menu to end your session on this device.

Tips:

– If the form says the two passwords do not match, type the second one again.
– Changing your password does not sign out devices that are already signed in. Use Sessions to do that.
– Your own device is listed in Sessions; use Sign out in the account menu to end it.

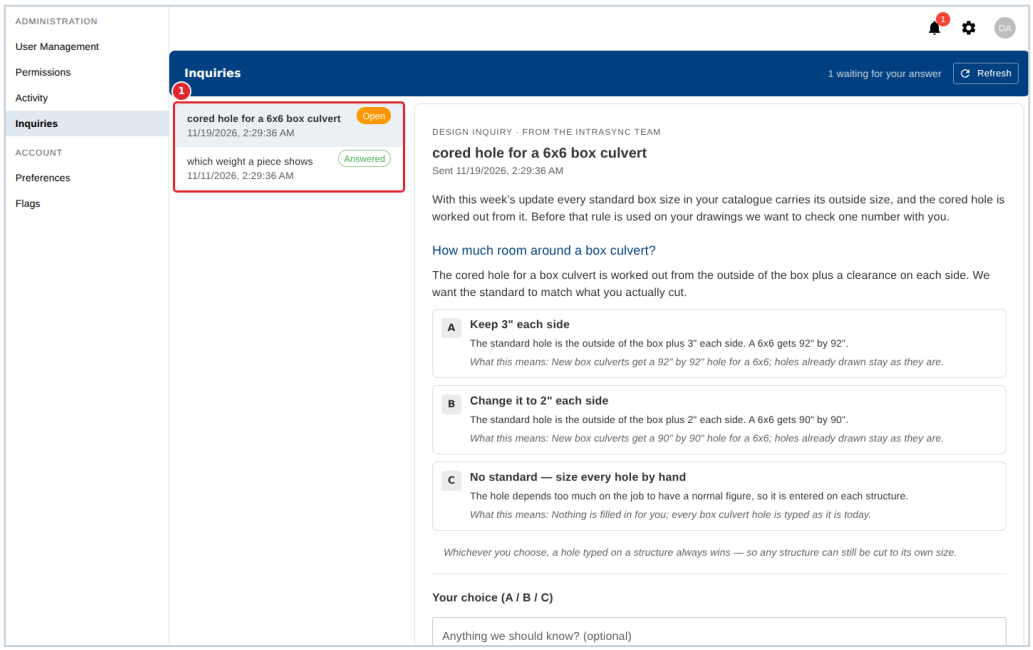
This is shown in the Core video at 1:48.

18. Answer a question from the IntraSync team

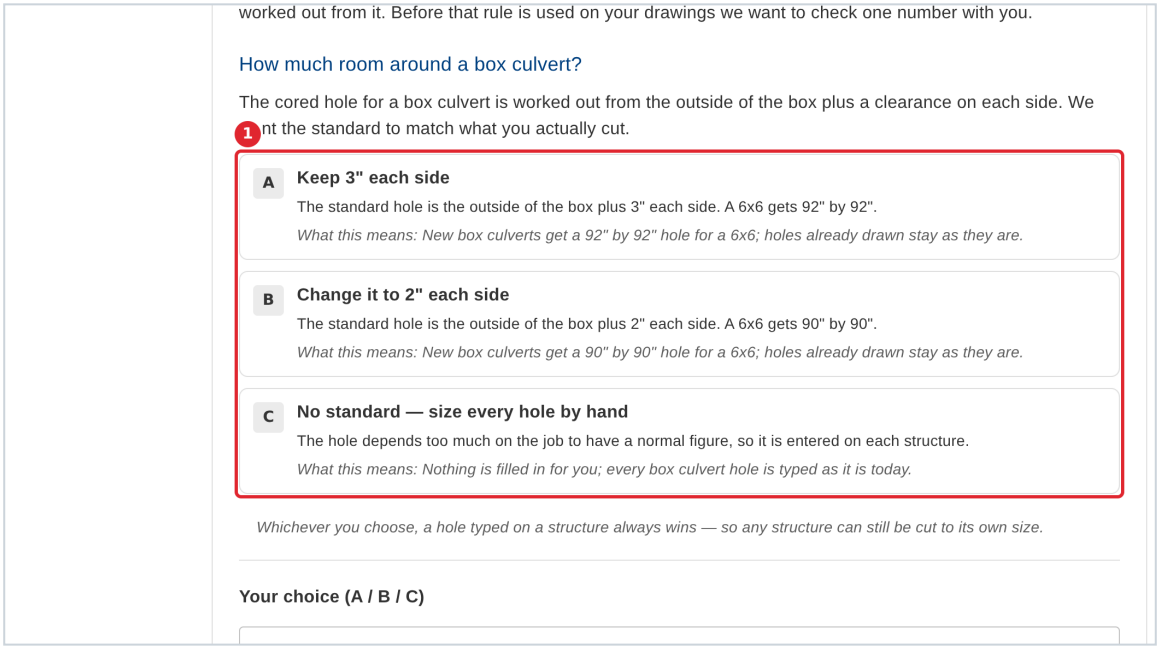
When the IntraSync team needs a decision from your company, the question arrives here. Your answer decides how the software behaves for you.

Before you start:

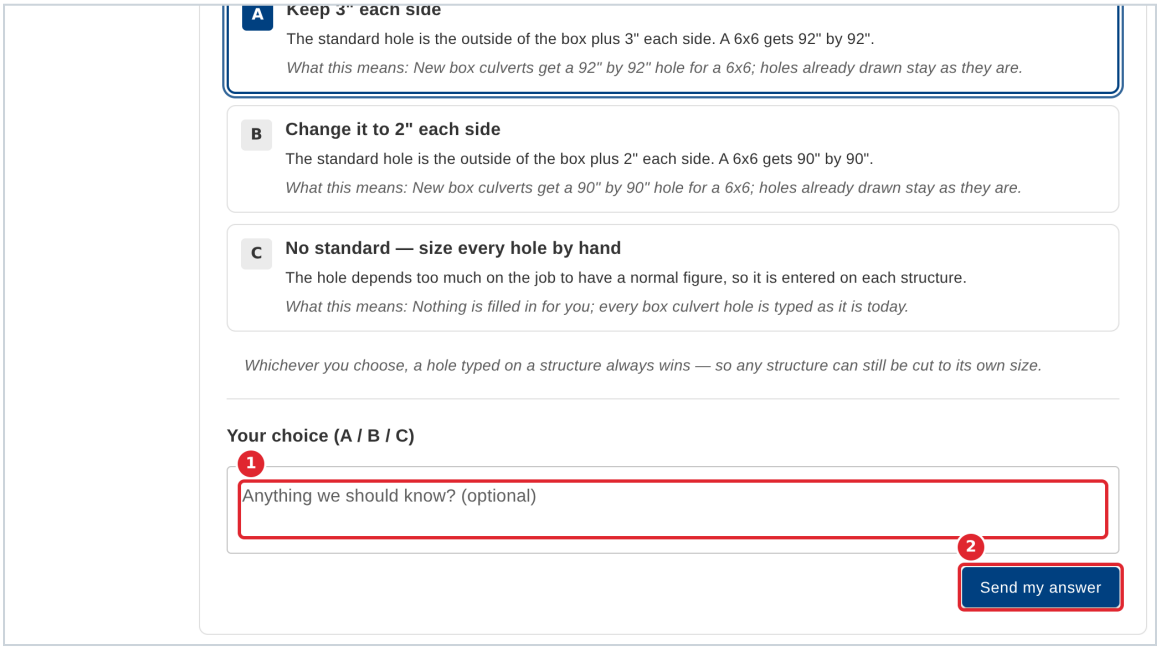
– The question is addressed to you, or you are an administrator.



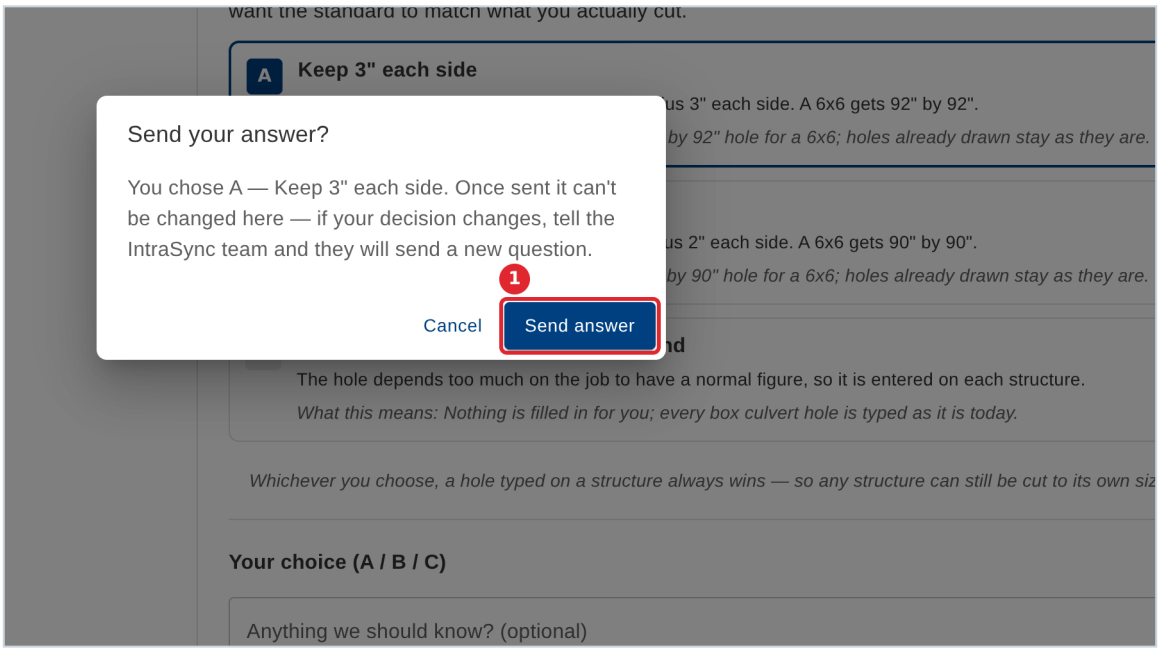
Step 1. Open Inquiries. Questions waiting for your answer are listed first, marked Open.



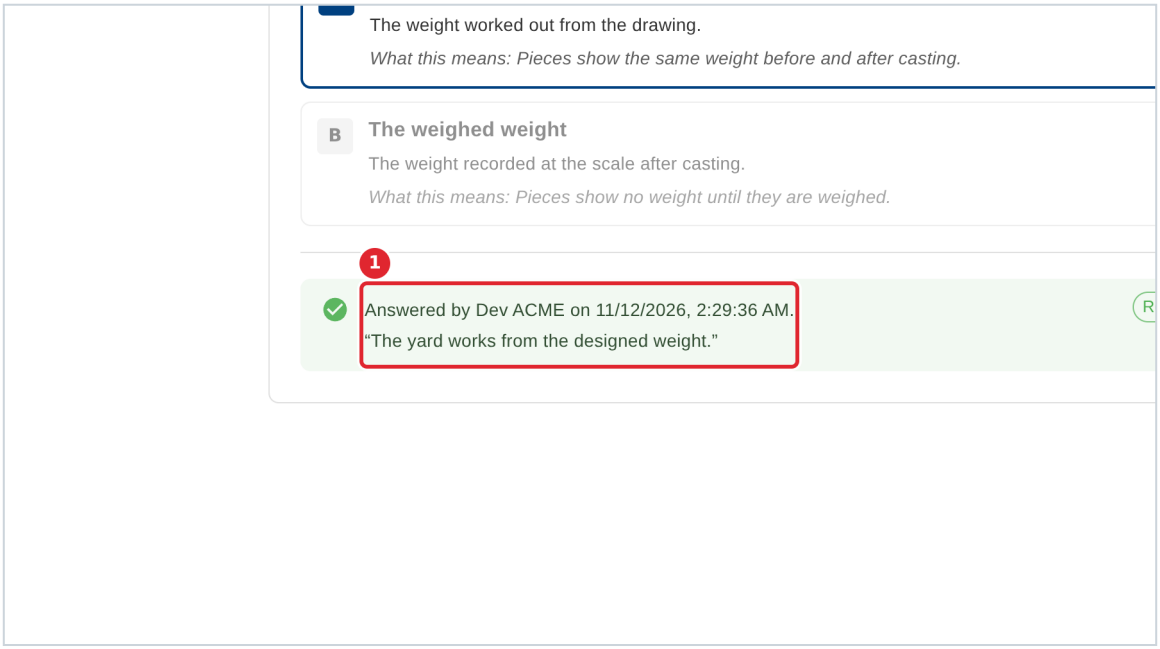
Step 2. Read the question and the options. Each option says what it would mean for you.



Step 3. Pick an option, add a comment if you like, then select Send my answer.



Step 4. Check your choice and select Send answer. Once sent it cannot be changed here.



Step 5. An answered question shows who answered and when, and whether the answer has reached the IntraSync team.

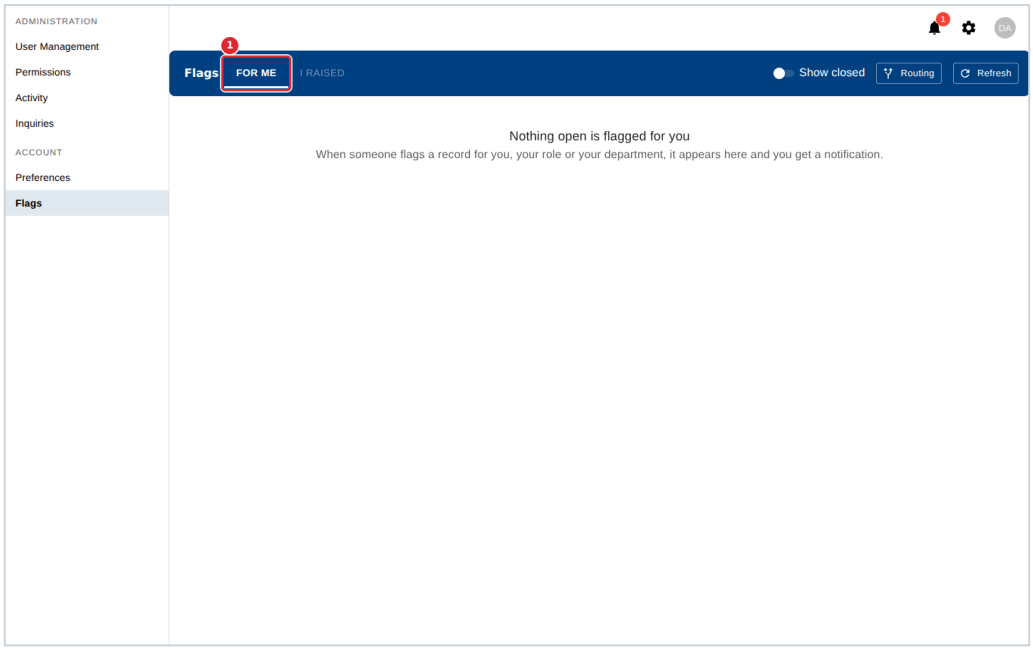
Tips:

- Send my answer stays unavailable until you pick an option for each question.
- Once sent, an answer cannot be changed here. If your decision changes, tell the IntraSync team and they will send a new question.
- If someone else must answer, the page says only the person the question is addressed to, or an administrator, can answer it.
- You get a notification when a new question arrives.

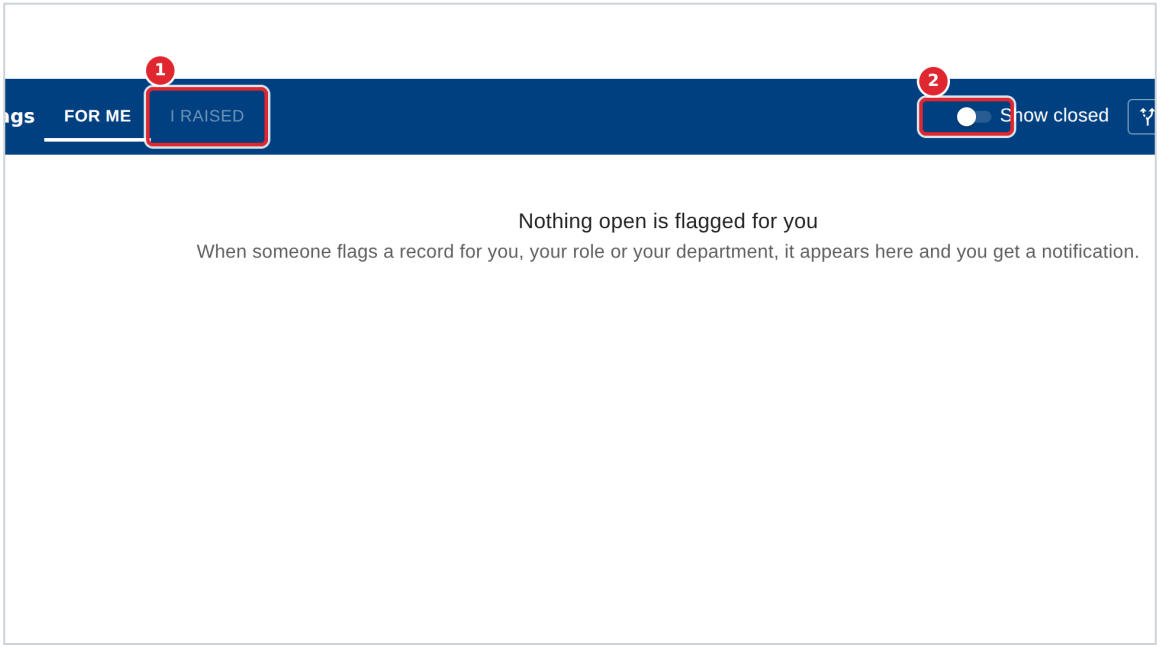
This is shown in the Core video at 2:06.

19. Work through the flags raised for you

Flags are requests from other people or departments to act on a record, such as a piece or a load. This page is your to-do list of them.



Step 1. Open Flags. For me lists records flagged for you, your role or your department.



Step 2. Select I raised to follow the flags you raised. Turn on Show closed to include flags already done or dismissed.

– Step 3. On a flag, select Done when the work is finished, or Dismiss if no action is needed. Add a note if you like, then confirm.

Tips:

- A closed flag cannot be reopened, and the person who raised it sees your note.
- Flags are raised from the records themselves, in the modules that offer a Flag button, not from this page.
- You get a notification when a flag is raised for you, your role or your department.

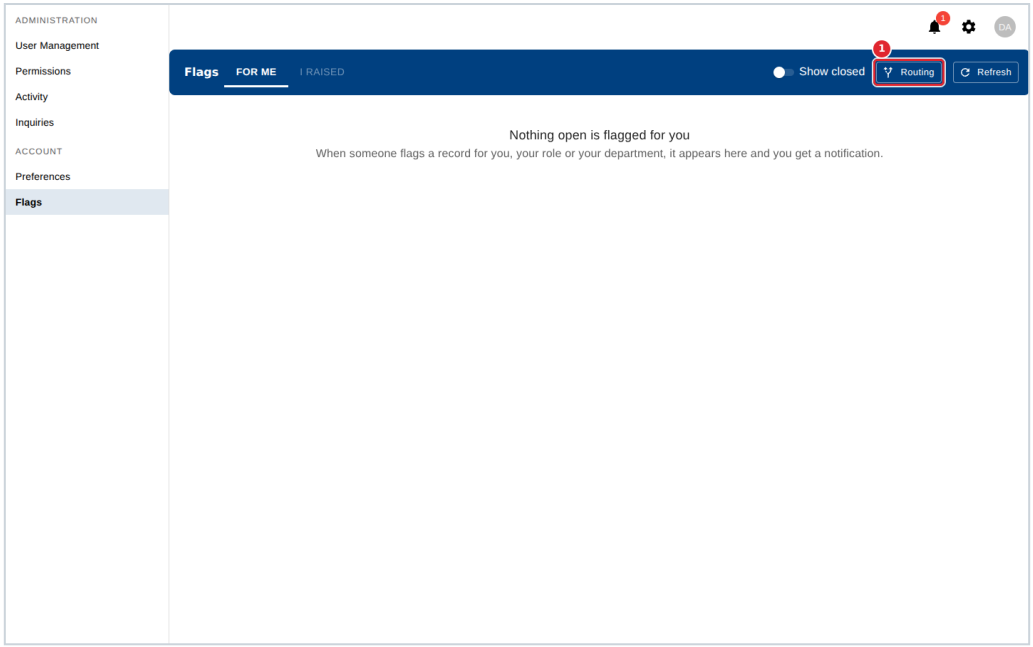
This is shown in the Core video at 2:21.

20. Choose where flags go

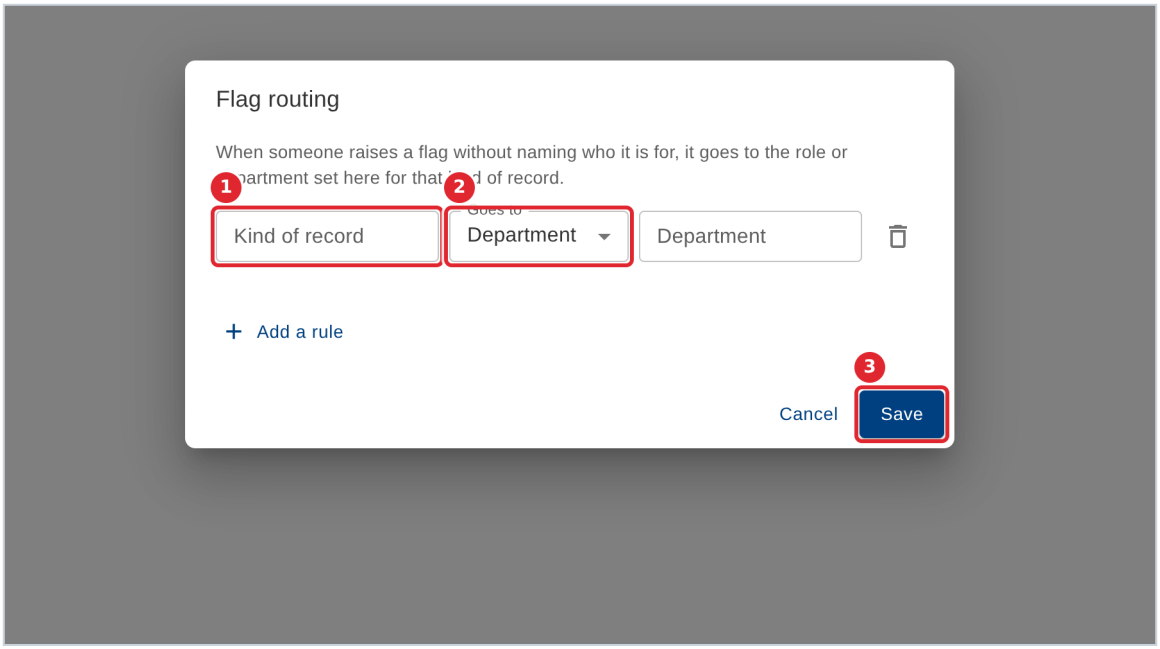
When someone raises a flag without naming who it is for, routing sends it to the right role or department for that kind of record.

Before you start:

- You are an administrator. Everyone else can read the rules but not change them.



Step 1. Select Routing.



Step 2. Select Add a rule. Enter the kind of record, choose whether it goes to a Department or a Role, and name it. Then select Save.

– Step 3. To remove a rule, select the bin icon at the end of its row, then select Save.

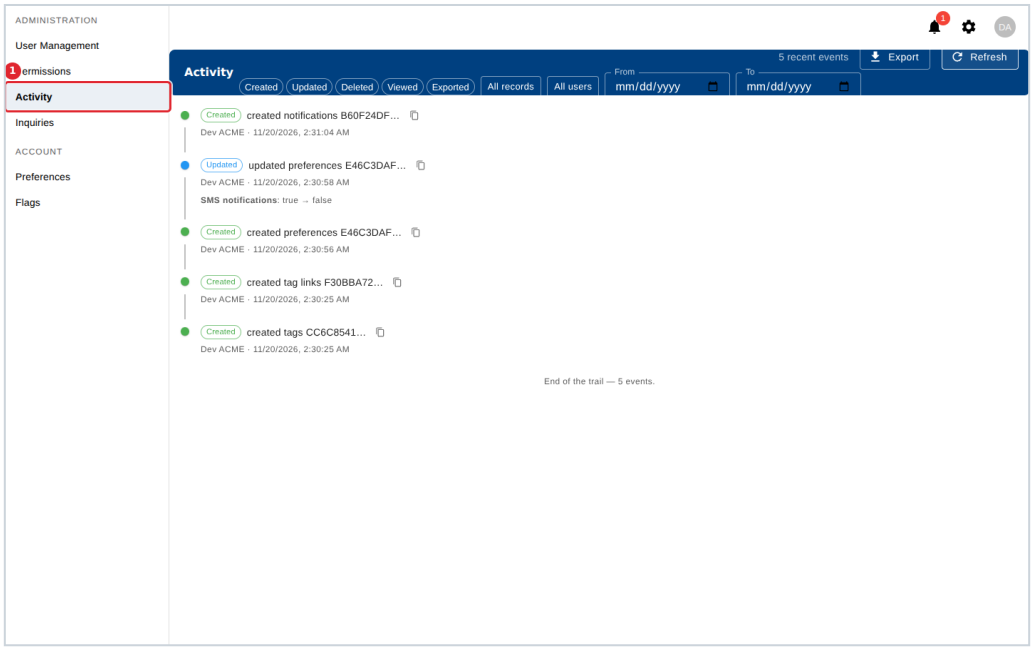
Tips:

– With no rules, every flag must name who it is for.

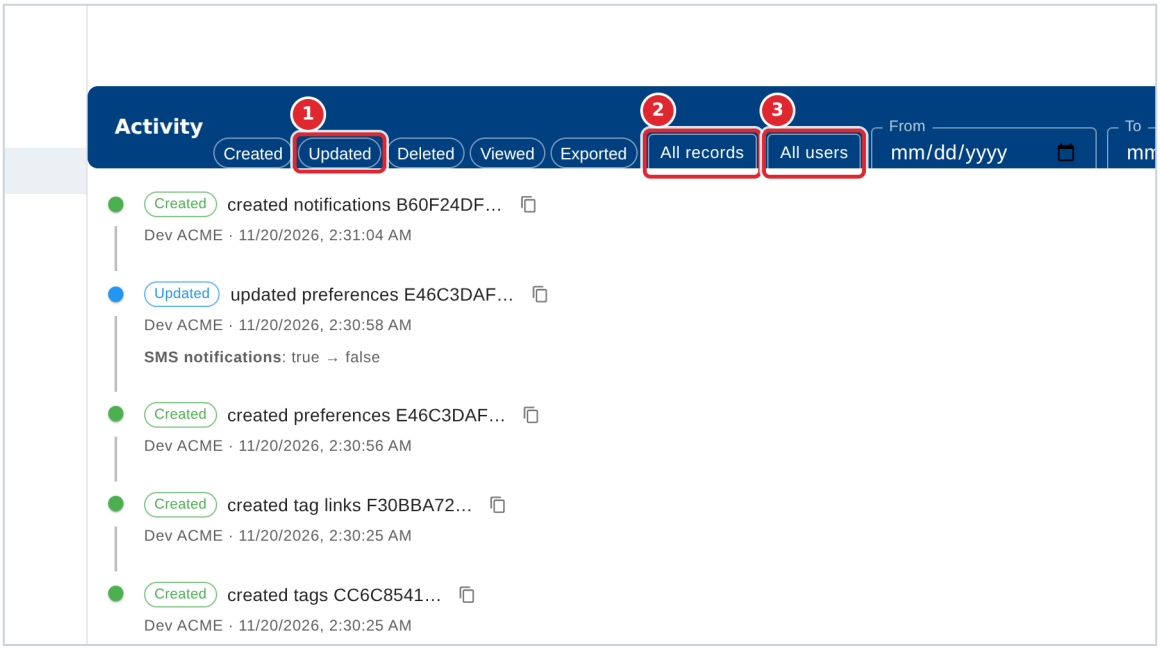
This is shown in the Core video at 2:31.

21. Review the activity trail

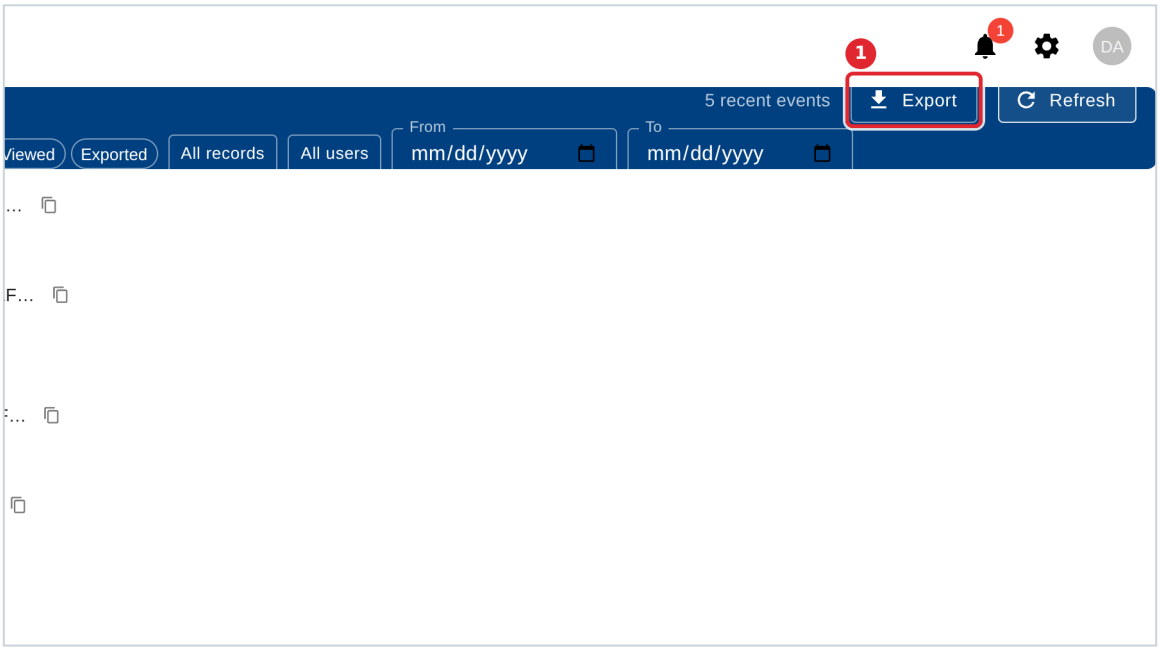
See who changed what, and when, across the system, and export it for an audit.



Step 1. Open Activity. Each entry says what changed, who changed it and when.



Step 2. Narrow the list with the action chips, the record and user menus, and the From and To dates. Select Clear to remove the filters.



Step 3. Select Export to download every matching event as a spreadsheet file.

- Step 4. Select the copy icon beside an entry to copy the record's id.
- Step 5. At the bottom, select Load more to see older events. The end of the list says when you have reached the end of the trail.

Tips:

- Updated entries show each changed field with its old and new value.
- If an export could not include every event, the file name ends in partial and a message says so.

This is shown in the Core video at 2:38.

Glossary

- Role: A named set of access for a job. Everyone given the role gets its access.
- Grant: One line of a role that allows Create, Find, Patch or Remove at a location.
- Override: An exception for one person that adds to, or blocks, what their roles allow.
- Location: The page or area of an app that a grant or override applies to.
- Flag: A request to another person, role or department to act on a record.
- Inquiry: A question from the IntraSync team that needs a decision from your company.