Internal Access Checklist: What You Need to Know

Overview

- There can only be **one** administrator per account.
- *Automatically* linked to the username and login entered during registration.
- Responsible for account setup / configuration and management.
- Primary point of contact for users with questions or problems.
- Creates users and assigns roles / permissions.
- Up to **250** user accounts can exist per ANID.
- Can have different roles / permissions, which correspond to the user's actual job responsibilities.
- Can access all or only specific customers assigned by the Administrator.

Create Roles & Users

1. From the **Company Settings** menu, click on **Users** and the *Users page* will load.
2. If you need to create a role, make sure to stay under the tab **Manage Roles**, then click on the "**+**" sign.
3. *Enter a name and a description* for the role, then select one or several permissions for this role. Click on **Save** when you are done.
4. To create a user, go to the **Manage Users** tab and click on the "**+**" sign. Enter a *username* (email format), *email address, first* and *last name,* and optionally a *phone number* for this user.
5. Select a role in the **Role Assignment** section and decide if the user is to be assigned to *all* customers or *specific ones*.
6. Click on **Done**.

Edit and Modify Users

1. Click on the **Manage Users** tab.
2. Click on **Actions** for the selected users.
3. Click on **Edit** to *modify* the role assignment or *reset the password* of the user
4. Other options:
   a. *Delete User*
   b. *Make Administrator*
   c. *Add to Contact List*
   d. *Remove from the Contact List*