

## How to: Add a User and/or Edit their Permissions:

This step-by-step guidance provides information on how to:

1. Add a new User to a firm's Online Reporting account;
2. Change the Permissions for a User.

### Part 1: Add a New User Account:

To add a User, please complete the following steps:

- i. Once logged in as a Firm Administrator or Business Administrator, on the *Home Page* click 'Manage User Accounts' as in figure 1.1.

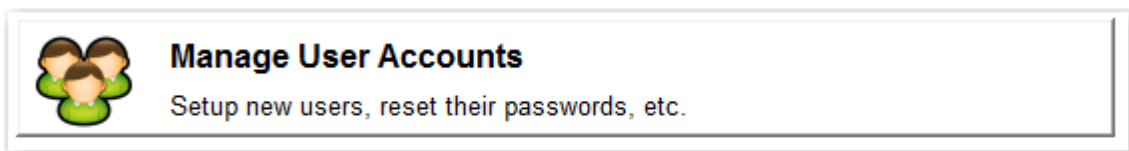
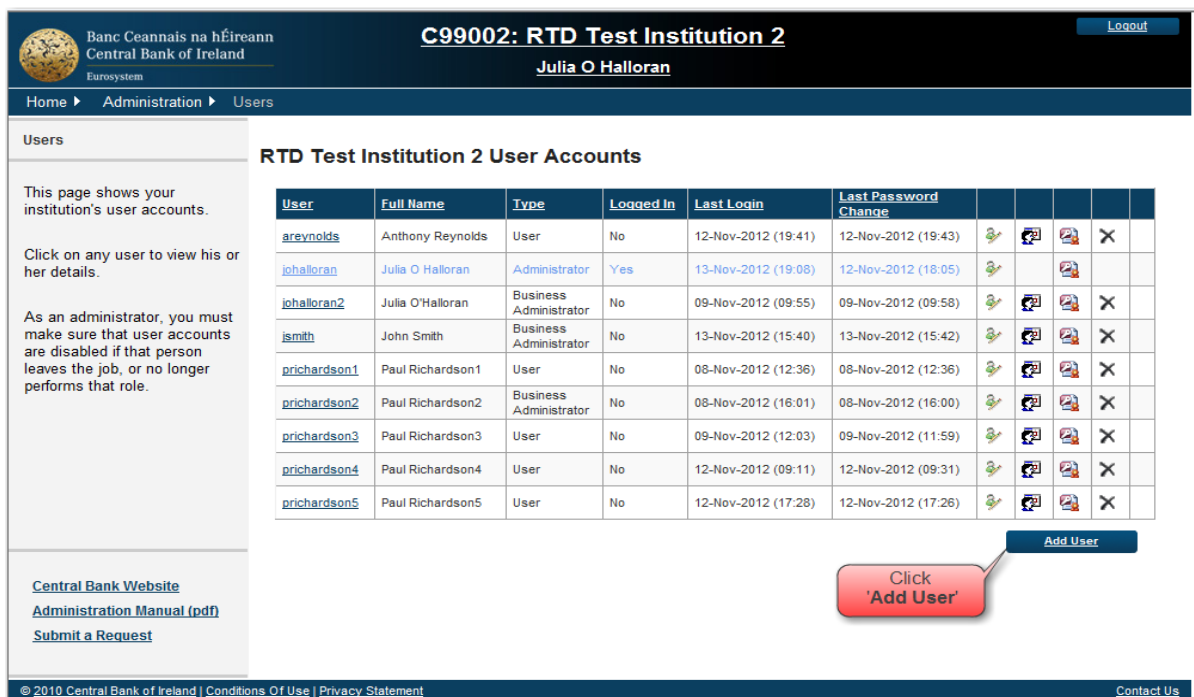


Figure 1.1

- ii. The Entity's *User Accounts* page appears. Click the 'Add User' button on the bottom right hand side of page, as shown in figure 1.2.



The screenshot shows the 'Users' management page for 'RTD Test Institution 2'. The page header includes the Central Bank of Ireland logo and the user's name 'Julia O'Halloran'. The main content area features a table of user accounts with columns for User, Full Name, Type, Logged In, Last Login, and Last Password Change. A red callout bubble points to an 'Add User' button in the bottom right corner of the table area.

User	Full Name	Type	Logged In	Last Login	Last Password Change				
<a href="#">areynolds</a>	Anthony Reynolds	User	No	12-Nov-2012 (19:41)	12-Nov-2012 (19:43)				
<a href="#">johalloran</a>	Julia O'Halloran	Administrator	Yes	13-Nov-2012 (19:08)	12-Nov-2012 (18:05)				
<a href="#">johalloran2</a>	Julia O'Halloran	Business Administrator	No	09-Nov-2012 (09:55)	09-Nov-2012 (09:58)				
<a href="#">jsmith</a>	John Smith	Business Administrator	No	13-Nov-2012 (15:40)	13-Nov-2012 (15:42)				
<a href="#">prichardson1</a>	Paul Richardson1	User	No	08-Nov-2012 (12:36)	08-Nov-2012 (12:36)				
<a href="#">prichardson2</a>	Paul Richardson2	Business Administrator	No	08-Nov-2012 (16:01)	08-Nov-2012 (16:00)				
<a href="#">prichardson3</a>	Paul Richardson3	User	No	09-Nov-2012 (12:03)	09-Nov-2012 (11:59)				
<a href="#">prichardson4</a>	Paul Richardson4	User	No	12-Nov-2012 (09:11)	12-Nov-2012 (09:31)				
<a href="#">prichardson5</a>	Paul Richardson5	User	No	12-Nov-2012 (17:28)	12-Nov-2012 (17:26)				

Figure 1.2

- iii. Assign the new user an Account Type. A Firm Administrator may add new Business Administrator or User Accounts, while Business Administrators may also add new User Accounts or new Business Administrator Accounts if they tick the box marked 'User can administer at own level?'. See figure 1.3.

The screenshot shows the 'Edit Profile' page for user Julia O'Halloran. The page includes a navigation bar with 'Home', 'Administration', 'Users', and 'johalloran2'. The main content area is titled 'Julia O'Halloran - Edit Profile' and contains the following fields:

- Login: johalloran2
- Title\*: Ms
- First Name\*: Julia
- Surname\*: O'Halloran
- Email\*: julia.ohalloran@centralbank.ie
- Telephone\*: 123456
- Job Title\*: Bank Officer
- Account Type\*: Business Administrator (dropdown menu open showing options: Business Administrator, Administrator, Business Administrator, User)
- User can administer at own level? (checkbox)

Buttons for 'Save' and 'Cancel' are at the bottom. A red callout bubble points to the 'Business Administrator' option in the dropdown menu with the text 'Choose Account Type'.

Figure 1.3

- iv. On the *Add User* page fill in the fields marked with an asterisk, as these are mandatory fields.
- v. Notify the User of their new password. They will have to follow a number of steps when logging in for the first time in relation to setting a new password and security questions. Please refer them to the Quick Reference guide on 'How to – Log In for the First Time' which contains details of this process.

## **Part 2: Change the Permissions of a User:**

There are different levels of access Users can have to the data on the ONR System, as shown in the table below. Users must be assigned a level of access or they will be unable to view any returns.

Role	Access
Edit	Upload, Edit, View and Finalise data
Verify	View and sign off data
View	View data

To edit the permissions of a User, adding or removing their ability to edit, sign off on, or read documents on the system, please complete the following steps:

- i. Once logged in as a Firm Administrator or Business Administrator, on the *Home Page* click **'Manage User Accounts'** as shown in figure 2.1.

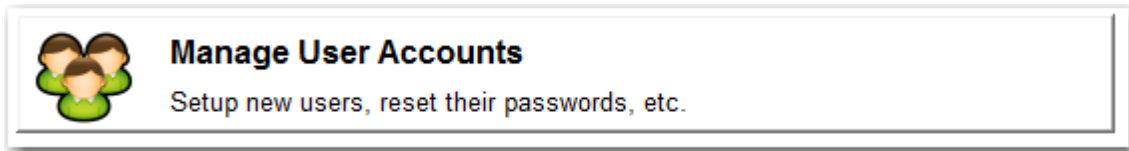


Figure 2.1

- ii. On the *User Account* page click on the symbol shown in figure 2.2 opposite the user's name.

**RTD Test Institution 2 User Accounts**

User	Full Name	Type	Logged In	Last Login	Last Password Change				
<a href="#">areynolds</a>	Anthony Reynolds	User	No	12-Nov-2012 (19:41)	12-Nov-2012 (19:43)				
<a href="#">jhalloran</a>	Julia O'Halloran	Administrator	Yes	13-Nov-2012 (19:08)	12-Nov-2012 (18:05)				
<a href="#">jhalloran2</a>	Julia O'Halloran	Business Administrator	No	09-Nov-2012 (09:55)	09-Nov-2012 (09:58)				
<a href="#">jsmith</a>	John Smith	Business Administrator	No	13-Nov-2012 (15:40)	13-Nov-2012 (15:42)				
<a href="#">prichardson1</a>	Paul Richardson1	User	No	08-Nov-2012 (12:36)	08-Nov-2012 (12:36)				
<a href="#">prichardson2</a>	Paul Richardson2	Business Administrator	No	08-Nov-2012 (16:01)	08-Nov-2012 (16:00)				
<a href="#">prichardson3</a>	Paul Richardson3	User	No	09-Nov-2012 (12:03)	09-Nov-2012 (11:59)				
<a href="#">prichardson4</a>	Paul Richardson4	User	No	12-Nov-2012 (09:11)	12-Nov-2012 (09:31)				
<a href="#">prichardson5</a>	Paul Richardson5	User	No	12-Nov-2012 (17:28)	12-Nov-2012 (17:26)				

Click on this icon

Add User

Figure 2.2 User Accounts Page

- iii. On the *Edit Access* page, shown in figure 2.3, click on the drop-down menu to delegate access as required per return type.

Banc Ceannais na hÉireann  
Central Bank of Ireland  
Eurosysteem

**C99002: RTD Test Institution 2** Logout

Julia O Halloran

Home Administration Users jsmith Edit Access

### Edit User Access

#### 'John Smith' - Edit Access

This page shows the access that 'John Smith' has to each return type.

For maximum security, you should only grant the minimum access that this user needs to do his or her job.

Granting 'Administrator' access to a return type allows the user to set up more users with access to that return type.

Return Type	Role
Bank Statements	(none)
Bank Statements - Quarterly Accounts	Administrator
Cover Pages (Consolidated)	Edit Verify View
Deposit Protection	(none)
FINREP Individual	(none)
Funding Return	(none)

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Figure 2.3 Edit Access Page

- iv. Figure 2.4 displays the Funds System Administrators view of the *Edit Access* page. The Funds System Administrator can assign regulatory returns to a third party here.

Home Administration Users InvManager2 Edit Access

### Edit User Access

#### 'Joe Bloggs' - Edit Access

This page shows the access that 'Joe Bloggs' has to each return type.

For maximum security, you should only grant the minimum access that this user needs to do his or her job.

Granting 'Administrator' access to a return type allows the user to set up more users with access to that return type.

Return Type	Role
Financial Derivative Instruments	Administrator
IF Annual Audited Financial Statements	(none)
IF Financial Statements - Interim Return	Administrator Edit View
IF Sub-Fund Profile	(none)
Key Investor Information Document (KID)	(none)
Regulatory Report - Fund	(none)

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Figure 2.4 Funds Firm/System Administrator View of the Edit Access page