



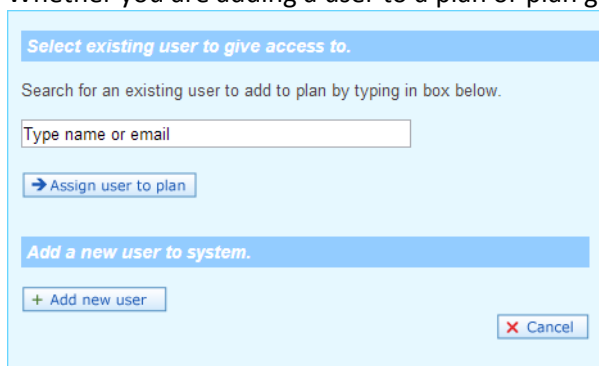
## Adding a user to a plan or plan group

If you would like another Account user to have access to your plan or plan group, and all of the related disclosures and consolidations, you need to add the user to your plan or group. You can assign an existing Account user to your plan/group, or add a new system user and assign them to your plan/group.

### How to add a user to a plan or plan group

1. In the **Select client account/plan** on the left, click on the Client Account name to view all plans and plan groups associated with that client.
2. Still in the **Select client account/plan**, click on the name of the plan or plan group to which you would like to add a user.
3. Go to the panel titled **Users with access to plan** (or **Users with access to plan group**). You will see a list of users that already have access to the plan or group.
  - For plans: click 
  - For plan groups: click 

Whether you are adding a user to a plan or plan group, the following panel will appear:



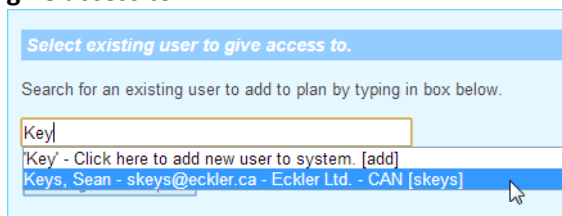
The screenshot shows a light blue panel with the following elements:

- A header bar: **Select existing user to give access to.**
- Text: Search for an existing user to add to plan by typing in box below.
- Text input field: Type name or email
- Button: → Assign user to plan
- A header bar: **Add a new user to system.**
- Button: + Add new user
- Button: × Cancel

The next steps depend on whether or not the user already has an Account profile.

### Assigning existing Account users to your plan/group


1. You can check to see if the user already has an Account profile by typing the first few letters of the person's last name, first name or email address in the text box under **Select existing user to give access to**:




This screenshot shows the same panel as above, but with the text 'Key' entered in the search box. Below the search box, a dropdown menu is visible with the following items:

- 'Key' - Click here to add new user to system. [add]
- Keys, Sean - skeys@eckler.ca - Eckler Ltd. - CAN [skeys]

A mouse cursor is pointing at the second item.

- If the person has a profile in the system, click on their name to select it as shown above, and then click .



(If you are adding the user to a plan group, click .

- You will see the following panel:

**Assign user to plan**


Name: **Keys, Sean**  
 Email: **skeys@eckler.ca**  
 Organization: **Eckler Ltd.**  
 Country: **Canada (CAN)**   
 Phone: **416-696-3054** Fax:  
 Comments: **Actuary**

Please select the role that this user will play in this plan.


 


The user's profile information is summarized at the top. To assign the user to the plan, you must select the role that the user will play from the following three options:

- **Lead Actuary:** Lead actuaries have the greatest degree of administrative rights within the plan or plan group. They are able to:
  - Create new disclosures
  - View disclosures/consolidations
  - Edit disclosures/consolidations
  - Delete disclosures/consolidations
  - Edit the plan or plan group information
  - Delete the plan or plan group entirely
- **Local Actuary:** Local actuaries have all of the same rights as lead actuaries, except:
  - They cannot delete disclosures/consolidations
  - They cannot edit the plan or plan group information
  - They cannot delete the plan or plan group.
- **Client:** Client users have read-only access to the disclosures/consolidations in the plan/group.

When you have selected the user's role within the plan, click  to assign the user to the plan.

### Adding a new system user to your plan/group

- If the user does not already have an Account profile, you can set one up by clicking .

(If you are adding the new user to a plan group, click  beneath the heading **Add a new user to system.**)

2. The following panel will appear:



**Add new user to system and plan.**

**Add a new user**

User Code:   
*This is the user code that the user will log in with.*

Password:   
*Please ensure that the password is longer than 6 characters and includes at least one number.*

First Name:

Last Name:   
*Required.*

Phone:

Fax:

Organization:

User is part of an Abelica firm:   
*Checking this box gives the user rights to create client accounts and add new users.*

Country:

Comments:

Email:   
*Required.*

Assign role in plan:   
*Required.*

Fill in the details for the new user, keeping in mind:

- ▶ Not all fields are required, but you must provide the following:
  - User Code (i.e. a username for the new user)
  - Password
  - Last Name
  - Email address
  - Role within plan (i.e. Lead Actuary, Local Actuary or Client, as described above)
- ▶ If you click the checkbox labelled “User is part of an Abelica firm”, you are giving the user additional administrative rights (the ability to add new client accounts and new users). Even if you assign the person with a “client” role, if they are part of an Abelica firm, the user will maintain all the rights of a Local Actuary.

3. When you have completed the above fields, click  to create the new user profile and assign the user to the plan or plan group.