

Users and Roles



INFO: Before creating any additional users you must first create a Role. This Role will be assigned to the user that you create.

To create a Role click on **Personal** and then click on **Roles** in this example we are going to create an additional Administrator with all permissions.

On the **Create Role** page enter a **Label** and **Description** for the role. Next select which permissions are required, in this example we are creating another Administrator so we would select all permissions. Now click **Create Role**.

Call Record Web Portal SIGN OUT

Dashboard > Role Management > Create Role

Welcome
Alex Grant

Dashboard
Recordings
Analytics
Personnel
Agents
Departments
Users
Roles
Reports
Payment & Billing
Configuration

Create Role

Label (required)
Administrator

Description
Additional admin users

Permissions (required)

- Manage Roles
- Manage Users
- Manage Departments
- Manage Customer
- Manage Agents
- Manage Flags
- Manage Keywords
- Manage Vocabulary Words
- Manage Categories
- Manage Recorders
- Manage Numbers
- Review Recordings
- Review Statistics
- Review Invoices
- Manage Support Tickets

CREATE ROLE **CANCEL**

You have now created a **Role** for an Administrator with all permissions.

Next we need to create a User to assign this role to. Click on **Personal** then click on **Users**. On the **User Management** page you will see a list of current users. The primary Administrator is highlighted with a star and should not be deleted.

Welcome
Henry Jackson

- Dashboard
- Recordings
- Analytics
- Personnel
- Agents
- Departments
- Users**
- Roles
- Reports
- Payment & Billing
- Configuration

User Management

i You can manage your platform users through this section of the web portal. You can create new users, keep existing user records up to date or remove expired users restricting their access to the platform.

FILTERS

Name	Username	Email Address	Role	+ ADD USER
Alex Grant	[REDACTED]	[REDACTED]	★ Administrator	✎ 🗑
Ben Kearns	[REDACTED]	[REDACTED]	Admin	✎ 🗑
Henry Jackson	[REDACTED]	[REDACTED]	Admin	✎ 🗑

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Click on **Add User** to create a new user, on the **Create User** page enter the users **Name, Email Address, Username and select the Role** that you have created.



INFO: Please ensure that the email address is valid. The password will automatically be emailed once the user has been created. Make sure that you check your spam/junk folders. If you have not received the email you can use the **Forgot Password** link on the login page to request a new one.

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