

# 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.

Call Record Web Portal

SIGN OUT

Dashboard > User Management

Welcome

Henry Jackson

Dashboard

Recordings

Analytics

Personnel

Agents

Departments

Users

Roles

Reports

Payment & Billing

Configuration

User Management

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	
Alex Grant			★ Administrator	
Ben Kearns			Admin	
Henry Jackson			Admin	

Rows per page:

15

1-3 of 3

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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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