

Technical Note: User Roles and Creation

A CallN account can have multiple users, each with a defined role within the system.

Owner – Is the account creator and owner. There can only be one owner of an account and that person has complete control over the account with no restrictions.

Administrator – An Administrator can add, remove and edit all user accounts with the exception of the owner's account. They have full access to the portal but must be given permission to access financial data by the owner.

User – Can be locked to specific roles as must be given permissions to access data. A user can be given permission run reports but may not have permission to view call recordings for example.

To create a new user, log in to the CallN Portal and select Manage Users from the top right menu.

[Manage Users](#) | [Manage Account](#) | [Contacts](#) | [My Profile](#) | [Logout](#)

Click the Add New User button, and fill out the person's personal details. There is an option to add a photo against each user.

First Name

Last Name

Username

Email

Phone number

Photo

- None
 Custom

Timezone

Next area allow for users to be associated to handsets and if the user is to be an Administrator. The remaining options change depending if the user is an Administrator or not.

User not an Administrator	User is an Administrator
<p>Make this user an account Administrator?</p> <p><input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes - this user can add/remove and edit other users except the owner</p>	<p>Make this user an account Administrator?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can add/remove and edit other users except the owner</p>
<p>Can this user view all recordings?</p> <p><input type="radio"/> No, only calls to/from these phone number(s) and group(s)</p> <p><input checked="" type="radio"/> Yes - this user can view all recordings</p>	<p>Can this user access financials?</p> <p><input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes - this user can view and make payments</p>
<p>Can this user delete recordings?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can delete recordings</p>	<p>Can this user login from any location?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can login from anywhere</p>
<p>Can this user download recordings?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can download recordings</p>	
<p>Can this user e-mail recordings?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can e-mail recordings</p>	
<p>Can this user view audit records?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can view audit records</p>	
<p>Can this user view all report data?</p> <p><input type="radio"/> No - this user can only view report data for calls they have permission to</p> <p><input checked="" type="radio"/> Yes</p>	
<p>Can this user export data?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can export from calls and reports pages</p>	
<p>Can this user login from any location?</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes - this user can login from anywhere</p>	

Once the user has been defined by what actions they are able and unable to perform, click Apply to save the user.