

## User's: Creation and Roles

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

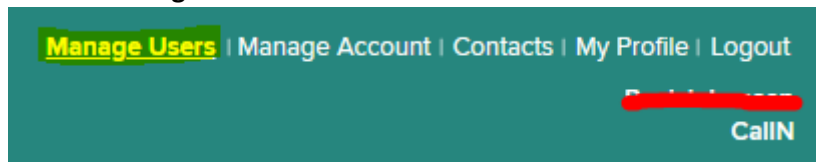
There are three types of roles:

- **Owner:** It has full control on the account. There can only be one owner of an account.
- **Administrator:** It 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:** It has specific roles which are set by the account **Owner or Admin**.

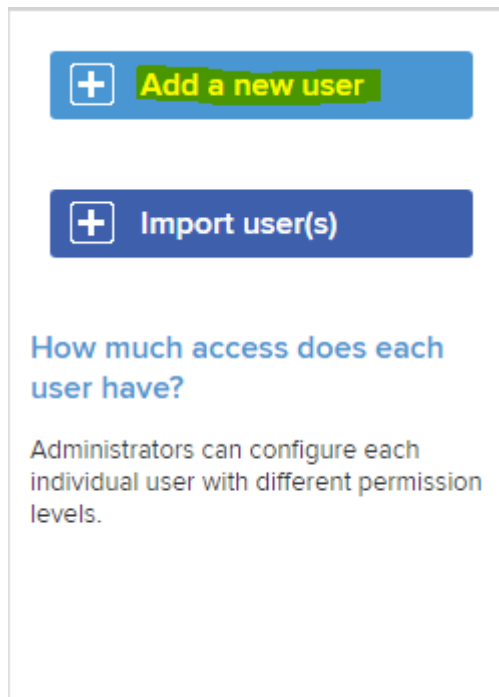
### How to create user and roles:

To create user steps as follow:

- Login to CallN portal with Owner or admin account.
- Navigate to top right corner **Menu**.
- Click on **Manage Users**.



- Then click on **Add a new user** button.



- It will open up a tab, here start filling the details of the user. It also gives you an option to set picture a user.
- Choose the right time zone because it can affect time on the reports.  
(Refers to the image, below.)

**Photo**

- None**
- Custom**

**Timezone**

--- Use account default --- ▼

- Next fields are associated with handsets, make new user admin and other roles follow as:

User not an Administrator	The user is an Administrator
<p><b>Make this user an account Administrator?</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> <b>No</b></li> <li><input type="radio"/> <b>Yes</b> - this user can add/remove and edit other users except the own</li> </ul> <p><b>Can this user view all recordings?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b>, only calls to/from these phone number(s) and group(s)</li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can view all recordings</li> </ul> <p><b>Can this user delete recordings?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can delete recordings</li> </ul> <p><b>Can this user download recordings?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can download recordings</li> </ul> <p><b>Can this user e-mail recordings?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can e-mail recordings</li> </ul> <p><b>Can this user view audit records?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can view audit records</li> </ul> <p><b>Can this user view all report data?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b> - this user can only view report data for calls they have permission</li> <li><input checked="" type="radio"/> <b>Yes</b></li> </ul> <p><b>Can this user export data?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can export from calls and reports pages</li> </ul> <p><b>Can this user login from any location?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can login from anywhere</li> </ul>	<p><b>Make this user an account Administrator?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can add/remove and edit other users except the own</li> </ul> <p><b>Can this user access financials?</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> <b>No</b></li> <li><input type="radio"/> <b>Yes</b> - this user can view and make payments</li> </ul> <p><b>Can this user login from any location?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> <b>No</b></li> <li><input checked="" type="radio"/> <b>Yes</b> - this user can login from anywhere</li> </ul>

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