

Quick Reference Guide - Managing Connect users



USER PERMISSIONS

User permissions are appropriate for firms that have two or more Connect users. If your firm has only one Connect user, that user will be a Principal User and will automatically have full access to everything.

There are five firm permission user types in Connect:

1. Principal Users (PU)
2. Firm Administrators
3. Submitters – create, edit and submit applications
4. Data Entry Only – can create, edit applications
5. Read Only

A standard restriction for all users, including a Principal User, is that they can't disable their own access. All other users cannot edit their own permissions. However Administrators can edit other user permissions except the Principal's.

Principal User (PU)

The PU permissions include the ability to **re-assign the PU to another user**, to add and edit users, and to **submit firm cancellations**. A firm can only have a single PU and this user is the responsible person for Connect.

PU permissions are assigned either when a firm is first registered on Connect or using the Re-assign Principal User function in the Manage Users menu.

Permissions for all other users can be set on creation and subsequently amended. Firm Administrator access can be selected however a user without this permission is still able to create, view, edit and submit applications dependent on their access.

Firm Administrator

A firm can have more than one Firm Administrator. The Firm Administrator will only be able to submit applications if they have the permission to do so for that firm and application type. They cannot edit their own or the PU's permissions but can edit other user's permissions.

Submitter

A Submitter can submit all firm applications if they have the permissions to do so. However they have no user management access.

ADDING A USER

Only PU and Firm Administrators can add users. If you are adding a user that already exists in the system, Connect will advise you that they already exist. The system will also prompt the existing user to 'Accept' your request. To add a user:

- Click the 'Manage Users' button at the top of the screen
- Select the applicable firm to add the user to (if you have access to multiple firms) using the 'Select Firm' menu
- Click the 'Create New User' button

Manage Firm Users

Select Firm: ABC Corp - 45535

Principal User: Rupert Jelf

Create New User

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- Enter the user's details, including whether they should be a Firm Administrator

User Detail

Firm: ABC Corp
Title: --none--
First Name:
Last Name:
Job Title:
Email Address:
Confirm Email Address:
Phone Country Code: +44
Telephone Number:
Firm Permissions: Firm Administrator

The new user screen will default to give access to data entry and submit all application types (except to submit a cancellation) upon creation and can be amended as required. To define different levels of access to specific application types the Administrator or PU needs to click the **Enable Advanced User Management** box.

- Click Save

ENABLE ADVANCED USER MANAGEMENT

Application Type	Data Entry	Submitter	Read Only
Appointed Representative	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approved Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cancellation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Variation of Permission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Once ticked Data Entry, Submitter and Read Only permissions can be selected per Application Type if this is a requirement for the user.

EDITING AND DISABLING USERS

Only PU and Firm Administrators can edit or disable other users. The edit function is limited to application type permissions – you cannot edit their personal details (name, email address etc) as the individual user must do this.

- Click the 'Manage Users' button at the top of the screen
- Select the applicable firm to edit/disable the user from using the 'Select Firm' menu
- Click Edit and amend their application type permissions as required
- Click Save

To disable a user's access from a firm you follow the above steps and instead of clicking 'Edit' click 'Disable' where you will be presented with a confirmation message before the user is disabled for that firm. The user can always be re-enabled at a later date.