



User Management Inside The Admin Portal

From the Users screen in the Admin Portal, you can now create, remove, reset password, reset 2FA, set Roles, and set Company Access.

To get started login to the Web Admin Portal at <https://msp.autoelevate.com> as an Admin Portal Administrator using your email address and AutoElevate password. Click on "Users" in the left-hand column.

To Create a New User - Navigate to the top of the Users screen where it says "Users" click the "+" symbol and you will then be able to fill in the necessary information setup the new account.

Fill in the fields for First and Last name, and email address (can't already exist on our system). Choose the user Role and set Company Access options.

3 default **Roles** to choose from:

- **Administrator** – Gives the user full access to the Admin Portal including user management screens, full permissions for approving and denying requests, and for creating and managing rules at all levels.
- **Technician (Level 2)** – Allows the user full access to do request approvals and denials and for creating and managing rules at all levels but does not give the user visibility to the user management screens.
- **Technician (Level 1)** – Has the same limitations of Level 2 but additionally limits the user to only doing 1-Time approvals and denials for requests. This Role does not allow the user the ability to create or manage rules.

3 sets of **Company Access** that can be applied to each user:

- **All** – Gives the user the ability to view, access, approve/deny requests, and create/manage rules for all companies.
- **Most** – Gives the user ability to view, access, receive notifications, approve/deny requests, and create/manage rules for all companies **except** for the specific companies listed. This might commonly be used to prevent a technician from doing approval/denials on their own system by selecting the

MSP's own internal Company as the exclusion. **Note:** When this level is selected, the user does not have access to create/manage global rules at the "All Companies" level.

- **Some** – Gives the user ability to view, access, receive notifications, approve/deny requests, and create/manage rules for **only** the specific companies listed. This might be commonly used to give an external user from a company site access to only their Company but no others. **Note:** When this level is selected, the user does not have access to create/manage global rules at the "All Companies" level.

Once all fields and options have been set click 'SAVE' to create the new user.

Edit User Settings - User settings (including changing a password) can be adjusted for an existing user by clicking edit button (looks like a pencil) next to the user's name which will then allow you to make adjustments to the user setup. Once complete click "SAVE" to commit the changes.

To Remove a User - Click the 'Trash can' next to the user's name and then confirm the deletion when the confirmation dialog appears.

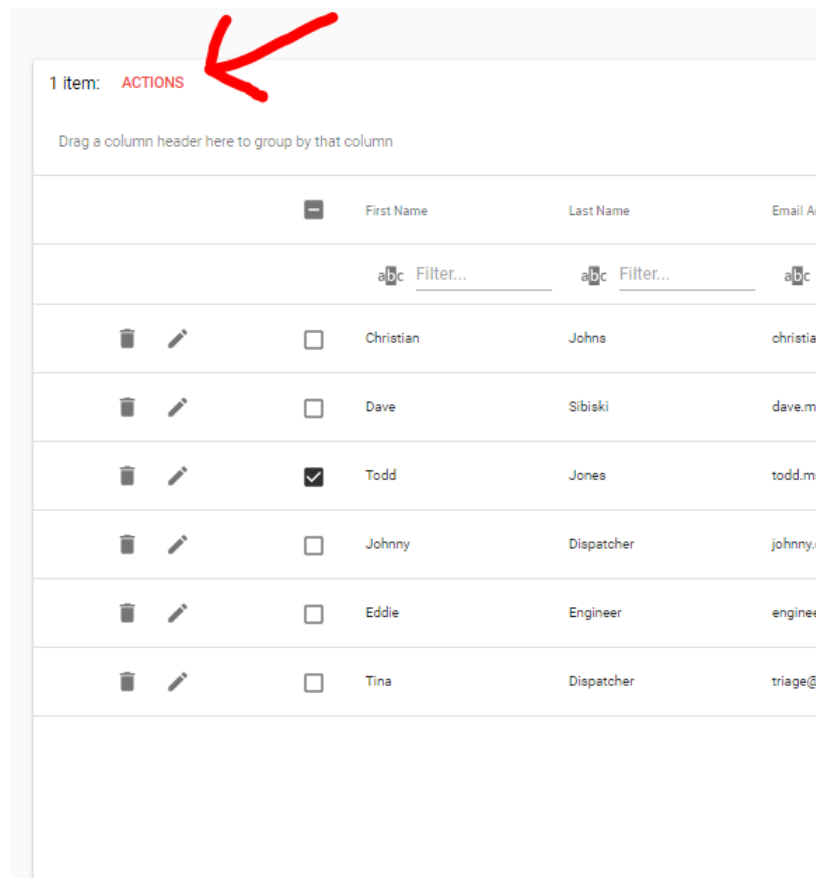
**** Please note that currently the Admin Portal does not send out an email or notification when a User account is created or changed. This is something that if desired you will need to communicate to your user directly ****

Other User Actions

From the **Actions** menu (at the top) you can reset a user's 2nd Factor Authentication and Link AutoElevate users to user accounts to your PSA ticketing system. (Note: AutoElevate matches the user's email address to the email address of the user in the PSA ticketing system.)

To Reset 2nd Factor Authentication – check the box next to the User(s) and then from the "Actions" menu under '2-Factor Auth' select "Reset".

To 'Link' an AutoElevate user account to your PSA ticketing system – check the box next to the User(s) and then from the "Actions" menu under 'Ticketing System' select "Link". (Note: for this functionality to work your AutoElevate system requires Integration to your PSA ticketing system which also may incur a setup fee – for integration please ask your account manager for details or email sales@autoelevate.com)



1 item: ACTIONS			
Drag a column header here to group by that column			
	First Name	Last Name	Email A
<input type="checkbox"/>	abc Filter...	abc Filter...	abc
<input type="checkbox"/>	Christian	Johns	christie
<input type="checkbox"/>	Dave	Sibiski	dave.m
<input checked="" type="checkbox"/>	Todd	Jones	todd.m
<input type="checkbox"/>	Johnny	Dispatcher	johnny.
<input type="checkbox"/>	Eddie	Engineer	enginee
<input type="checkbox"/>	Tina	Dispatcher	trriage@