

Contents

Add New Users	1
1.1 Adding a new internal user	1
1.2 Adding a new external user	2
1.3 Restrict 3rd party users access within a questionnaire	3

Add New Users

1.1 Adding a new internal user

Only Super Admins can invite new users. In the top ribbon Admins can click the below highlighted icon to add new users to the DiligenceVault account and the below pop-up will appear:



Invite User to Your Organisation

First Name*

First Name

Last Name*

Last Name

Email*

Email

User Roles ⓘ

Select user roles(s)

☐ Key person? ⓘ

☒ Visible contact? ⓘ

Access Level

Owner

View access level configuration

All entity access excluding firm settings. This user can access all entities, create/modify and delete them but they do not have access to firm settings

Save User

Invite & add another

Cancel

Complete First Name, Last Name and Email. These are mandatory fields.

User Roles, **Key person?** and **Visible contact?** are all optional.

You **MUST** set an **Access Level** – the below provides a summary of the main access levels we recommend using based on your use cases:

- Super Admin - role with the highest level of access within an account.
- Owner – can edit all questionnaires, unless restricted, and can submit a questionnaire.
- Contributor – can edit all questionnaires, unless restricted, but cannot submit.
- Viewer – can view all questionnaires, unless restricted, but cannot edit or submit.
- Restricted – reserved for users external to the business, see **Section 1.2** below for details.

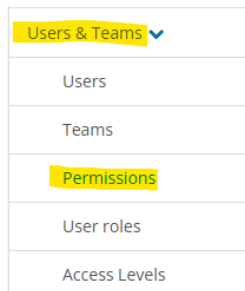
Select **Save User** once done.

1.2 Adding a new external user

Please contact researchsupport@lonsec.com.au if you'd like any assistance setting up external users.

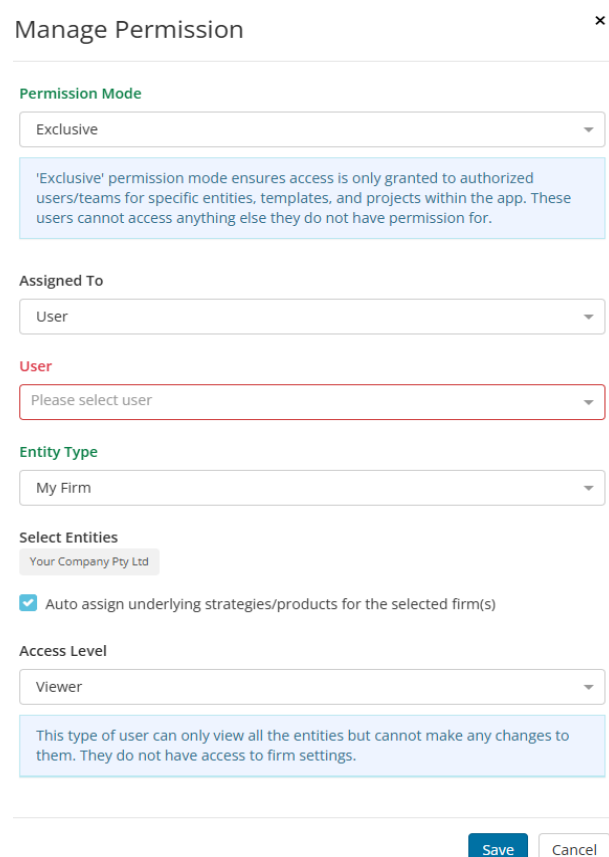
Only Super Admin users can invite new users. Follow the steps above, however set the **Access Level** to "Restricted".

Once this user has created their account, click on your name in the top right-hand corner and selecting "Users & Teams" and then "Permissions":



A screenshot of a dropdown menu. The top item is 'Users & Teams' with a downward arrow and is highlighted in yellow. Below it are 'Users', 'Teams', 'Permissions' (highlighted in yellow), 'User roles', and 'Access Levels'.

Select "New Permission" and the below pop-up will appear:



A screenshot of a 'Manage Permission' pop-up window. It contains several sections: 'Permission Mode' with a dropdown set to 'Exclusive' and a descriptive text box; 'Assigned To' with a dropdown set to 'User'; 'User' with a dropdown set to 'Please select user'; 'Entity Type' with a dropdown set to 'My Firm'; 'Select Entities' with a button 'Your Company Pty Ltd' and a checked checkbox 'Auto assign underlying strategies/products for the selected firm(s)'; 'Access Level' with a dropdown set to 'Viewer' and a descriptive text box. At the bottom are 'Save' and 'Cancel' buttons.

Set **Permission Mode** to "Exclusive" – this ensures users can only access what you have specified in this permission.

Set **Assigned To** as "User".

Select the user from the dropdown list that will appear.

For **Entity Type**:

- Select "My Firm" if you would like this user to access everything in the firm.
- Select "Product" if you would only like this user to have access to the products you specify.

For Access Level, see details above, however we recommend setting this to "Owner" if you are happy for this user to submit questionnaires. Set user to "Contributor" if you want to control when a questionnaire gets submitted.

Hit **Save**.

You will then see this permission appear in the Permissions table. You can edit this permission whenever you like to add/remove entities or delete the permission entirely.

NOTE if you do delete the permission, the user will not be able to see anything when they log in.

1.3 Restrict 3rd party users' access within a questionnaire

Currently there is no capability within DiligenceVault to restrict access within a questionnaire to specific questions or sections.

If a user has access to a questionnaire, they will have access to the full questionnaire and be able to view/edit all questions and responses. i.e. cannot invite a user and restrict to only the "Tax" section or questions 1, 2 and 3 but not 4 or 5.