Portal – Adding new users to an account

All moderators added to an account have the same abilities and access within the session room, but have different permissions available within the 'back area' of the platform – the portal.

This guide will explain the differences between different User Roles available for moderators. Roles are assigned when a user is initially added to the platform by an administrator.

Moderator Roles:

Administrator -

For: Members of the company who want the ability to add new users to a company account, and see any projects or sessions within that account, including older projects.

Moderator -

For: Anyone who will be moderating your interview/group, that you are happy to be able to see any projects or sessions within the account, including older projects. Recommended only for team members who are part of the company. These users cannot add new moderators to the account.

External Moderator -

For: Anyone who will be moderating your interview/group, who you do **not** want to be able to view sessions that they are not assigned to, including older projects. Recommended for anyone who is not directly part of the company. External moderators can also only access the session room and the reports for each session they are/were assigned to – they cannot access the system checks before sessions.

Please note: Roles can be changed after creation, by administrators, so if you are unsure of which role to assign someone as, we would recommend starting with 'External Moderator' and adding extra permissions at a later point if needed.

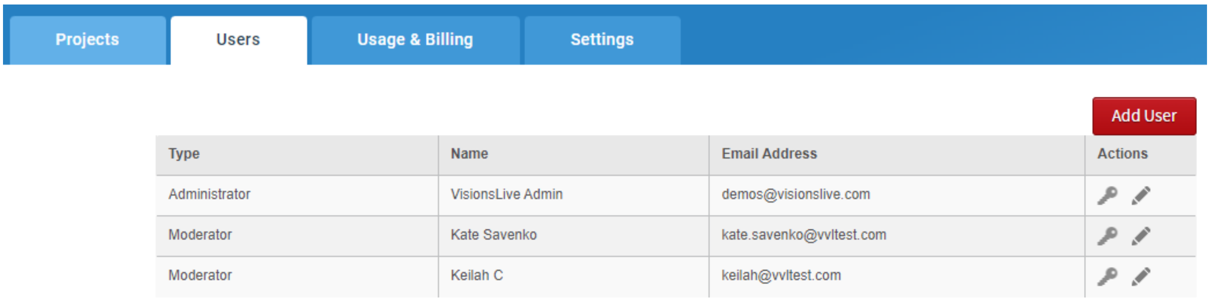
There are no limits to how many moderators you can have on an account, however if you want to change someone's role, you will need to edit an existing user, rather than adding them from scratch with a new role.

How to Add New Users:

First, access your company's account as an administrator. Only administrators can add new users to a company account.

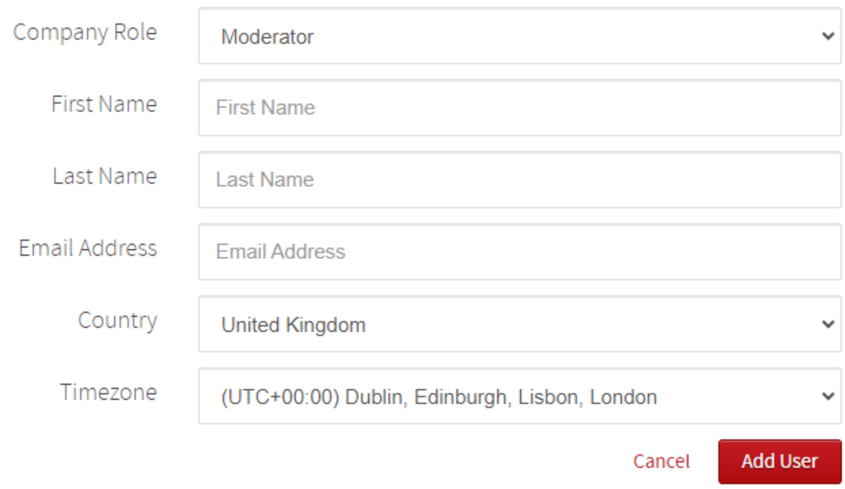
Then, at the top of the page, select the 'Users' tab. This will bring you to a page with all the moderators associated with your company account. This table tells you the user type, full name, and email address of each user.

At the top of this page, there is an 'Add User' button. Select this to begin adding a new moderator.



You will then have the option to fill in text boxes and drop-downs with details of your new moderator.

When filling out this page, the 'Company Role' options are 'Administrator', 'Moderator', and 'External Moderator'. Please choose the most appropriate using the descriptions on the previous page.



In addition, you will need the following information about your moderator:

- First Name
- Last Name
- Email Address
- Country
- Time Zone – (this ensures that session times are localised for everyone who accesses the platform.)

When you are finished, select 'Add User' and they will be added to the list of moderators on the previous page.

Editing Existing Users:

If you have a user who has been added to the account previously, but want to change their role, please press the 'Pencil' icon that is next to their name within the 'Users' tab, and you will be able to change any of the details you originally set up for that user. This includes being able to update their role.

If you try to add a new user who already has an email address within the company account, no changes will be made. In this instance, you would need to find and/or edit the original user.

If you have a user who has forgotten the password to access their portal account, please click the 'Key' icon next to their name, and you will be prompted to send them an email to reset this.

There are two ways to delete a user: you can click the red 'x' next to their name in the list (this is only available if they have not logged into their account before), or you can contact the VL team at support@visionslive.com and one of our team will delete them for you.

If you are having any issues, need a moderator adding/updating but don't have administrator permissions on your user account, or need anything clarifying, please feel free to reach out to your Project Manager for assistance, or email our support channels.