Edit Users: Roles & Permissons

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Overview

Each user on the **ftwilliam.com** system has a profile, which stores a variety of information, including login credentials, contact details, and module permissions. From the **Edit Users** screen, a profile can be updated by the Master User or a Designated Admin user. All users have the option to update their individual profile and passwords in the upper-right corner of the **ftwilliam.com** screen by clicking on their Display Name and by selecting Edit Profile.

FTW User Roles

Standard User

A Standard User has limited access and cannot manage other users or system-wide settings. A Standard User does have the option to update their individual profile and password in the upper-right corner of most **ftwilliam.com** screens by clicking on their Display Name and by selecting Edit Profile.

Designated Admin User

A Designated Admin User can manage users' permission by adding, modifying, and/or deleting other FTW users' contact information and permissions.

Master User

A Master User has the most access to ftwilliam.com. This user is generally the FTW user that creates an account with **ftwilliam.com** and should only be assigned to trusted individuals within the organization.

User Information

A FTW User first needs to be created in order to access the ftwilliam.com site. The Master User, or a Designated Admin User, will be able to add or modify other FTW users by filling out the following information:

First Name: An optional field for the FTW user's first name.

Last Name: An optional field for the FTW user's last name.

Display Name: A required field for the FTW user's display name, which will appear in the upper-right corner of the **ftwilliam.com** screen once logged into the site.

 $\textbf{Username:} \ A \ required \ field \ that \ will \ act \ as \ the \ FTW \ user's \ username \ during \ the \ login \ process \ for \ ftwilliam.com.$

Password: A required field that will act as the FTW user's password during the login process for ftwilliam.com. The password must meet the minimum password complexity requirements:

- Minimum of 8 characters
- At least 1 number and at least 1 special character
- Confirmation does not match or blank
- Current password does not match

Email: A required field for FTW users that is used for customer communication and support inquiries.

Permissions				
2 Permissions Matrix				
Here's a quick comparison of what each role can do:				
	Action	Standard User	Designated Admin	Master User
	Access Modules	(based on profile)	<u>~</u>	<u> </u>
	Add/Delete Plans	(if granted)	(if granted)	<u> </u>
	View Divisions	×	×	✓

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? Tips for Admins

Access Admin Tasks Page

Update User Passwords

Upload Company/Plan Data

Access Account Profile Page X

Update Plan Admins

Access Divisions Page

Manage Users

Run Reports

Phone Number

Module Permissions

Notes:

• To grant admin access, set "Designated Admin" to "Yes" in the user's profile.

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(limited)

- Use the Admin Tasks page to manage users and reset passwords.
- Master Users can access all divisions and account-level settings.