

Edit Users: Roles & Permissions

04/22/2026 10:42 am CDT

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.

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.

Phone: The user's phone number. This will be used to contact the user for any customer service inquiries, such as a password reset or technical question.

After updating the 'User Information', you will need to click on the 'Update' button in order to save the data to the ftwilliam.com systems. You may close the profile screen by clicking on the 'Close' button.

Module Permissions

The '**Module Permissions**' section allows a Designated Admin to grant access to the user for each module purchased.

The following permissions are available for each module:

- **View Only:** Does not allow the user to make changes to any plans or schedules.
- **Edit Only:** Allows the user to view and edit plans and schedules.
- **None:** Does not allow the user to use the specified module.

Users who have a permission of 'None' will not be able to enter that module, and will not be presented with a 'Go' button for the specified module.

Permissions

The '**Permissions**' section offers a list of permissions which affect the user on a 'global' basis and do not relate to a specific module. The following permissions are available:

- **Designed Admin:** Setting this to 'Yes' makes the user a Designated Admin and will allow the user to add and delete users, as well as change the passwords and contact information for all users on the system. Most users will want to leave this set to 'No'.
Designated Admins can also grant the Designated Admin privilege to other users, as such, this privilege should only be granted to trusted users.
- **May Delete:** Setting this to 'Yes' allows the user to delete companies and plans.
- **May Add:** Setting this to 'Yes' allows the user to add additional companies and plans.

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)	✓	✓
Add/Delete Plans	✓ (if granted)	✓ (if granted)	✓
View Divisions	✗	✗	✓
Access Admin Tasks Page	✗	✓	✓
Manage Users	✗	✓	✓
Update User Passwords	✗	✓	✓
Update Plan Admins	✗	✓	✓
Run Reports	✓ (limited)	✓	✓
Upload Company/Plan Data	✗	✓	✓
Access Account Profile Page	✗	✗	✓
Access Divisions Page	✗	✗	✓

? Tips for Admins

- To grant admin access, set “**Designated Admin**” to “**Yes**” in the user’s profile.
 - Use the Admin Tasks page to manage users and reset passwords.
 - Master Users can access all divisions and account-level settings.
-