Traders' Academy Online Courses

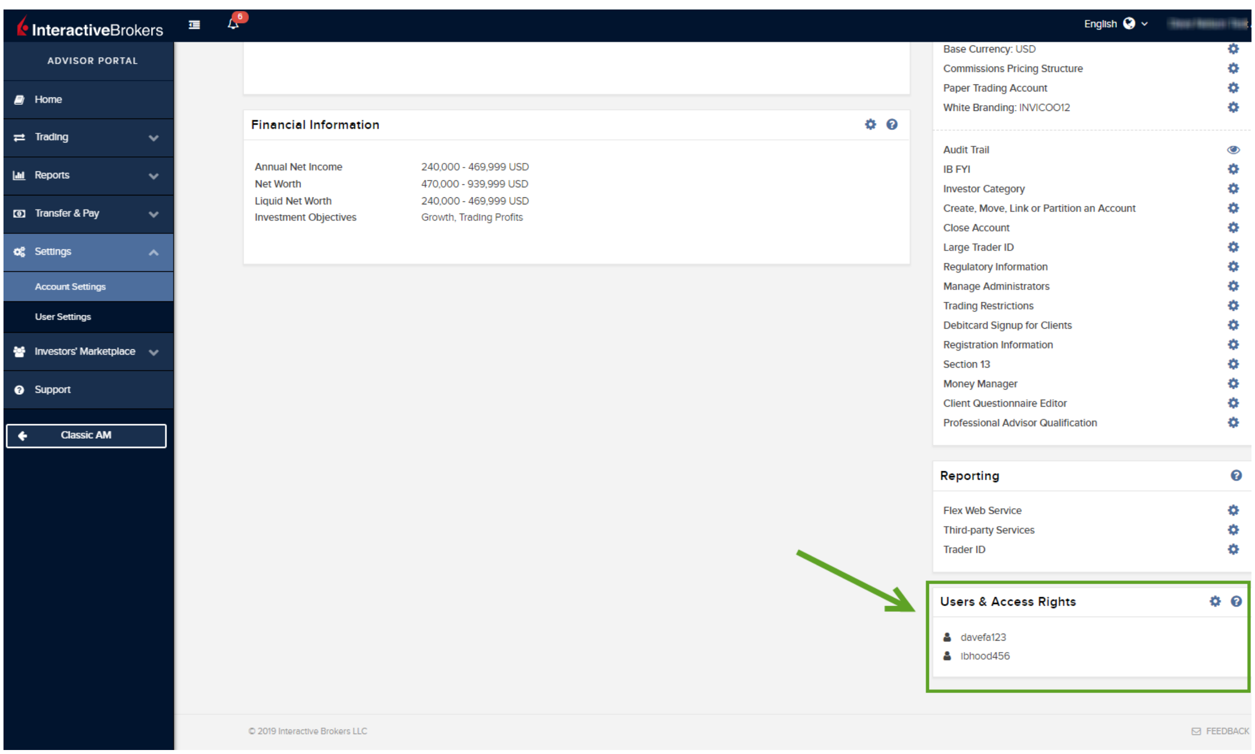
InteractiveBrokers

Adding Users & User Roles to Your Account – Study Notes

Adding Users

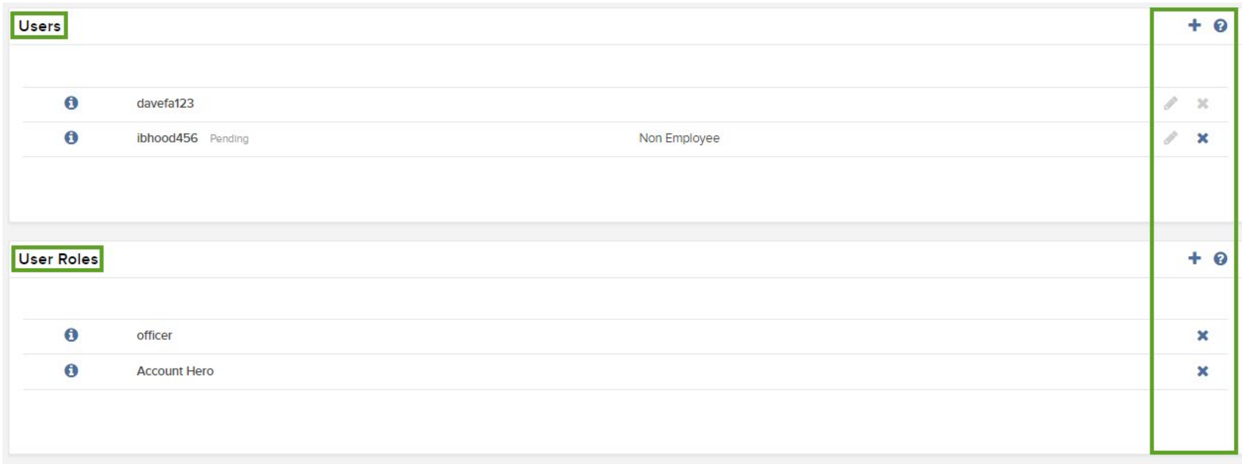
- Once your account is approved and funded, you may add users and grant them access to a subset of Advisor Portal functions. That includes granting access to functions for one or more sub accounts.

- Log in to Advisor Portal and from the side menu click Settings and Account Settings. The Users & Access Rights panel is displayed to the right in the Configuration column and shows all the users you have added to your account. Click the Configure icon to open the Users & Access Rights screen.



- Here there are two panels. The Users panel shows those individuals added to your account, as well as their relationship to the primary account holder. The User Roles panel shows all user roles that you have created.

Add, edit and delete Users from the set of icons to the right.



To add a user:

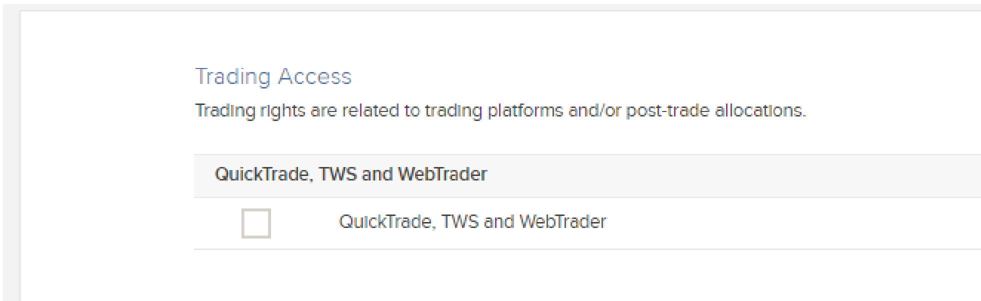
- Enter information about the user, including the username, password, name, relationship to the primary account holder and email address.
- In the next screen, select a user role, if you have saved any. User roles automatically apply a set of previously configured access rights to the new user. If you do this, you can skip any additional screens and continue to the review screen.
- Each screen that follows lets you give the new user rights to access a specific group of functions, such as User Settings and Trading Access.
- Click the account drop-down at the top to specify which account types are permissible for this user - or simply click on the Apply All button.
- Review all of the information about the new user, including access rights.
- Rights that have been assigned to the new user are shown checked and in green;
- Rights that have not been assigned to the new user are shown crossed out.

*If you do not participate in the Secure Login System for two-factor authentication, you will receive an email with a confirmation number. Enter the confirmation number sent to you via email, then click **CONTINUE**.*

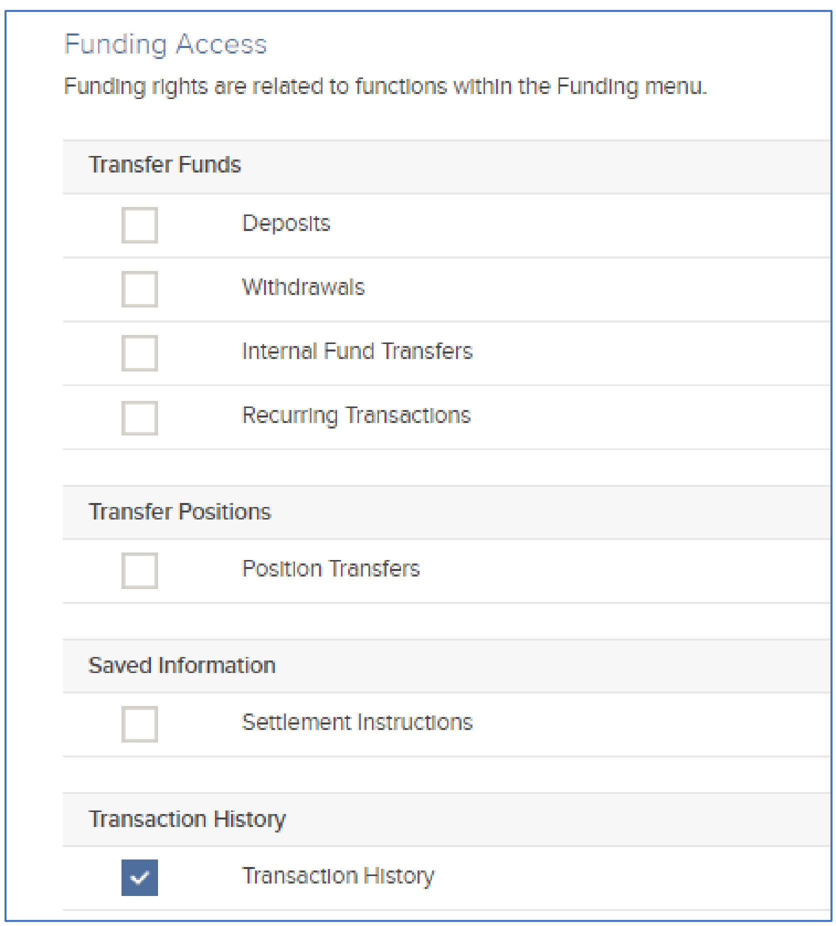
Adding User Roles

- A User Role contains a set of access rights to the functions in Advisor Portal that you can apply to new users without having to grant individual access rights across several screens.
- Assign a name to the role you wish to create and click Continue.
- Select the Settings Access for that role and click Continue.

- If you wish to provide this User Role with access rights to trading platforms and/or post-trade allocations, check the box and click Continue.



- You can grant access for many more features, such as:
  - Statements and other reports
  - User Settings
  - PortfolioAnalyst
  - Tax
  - Funding Access
  - Trading
  - Client Management



Reporting Access

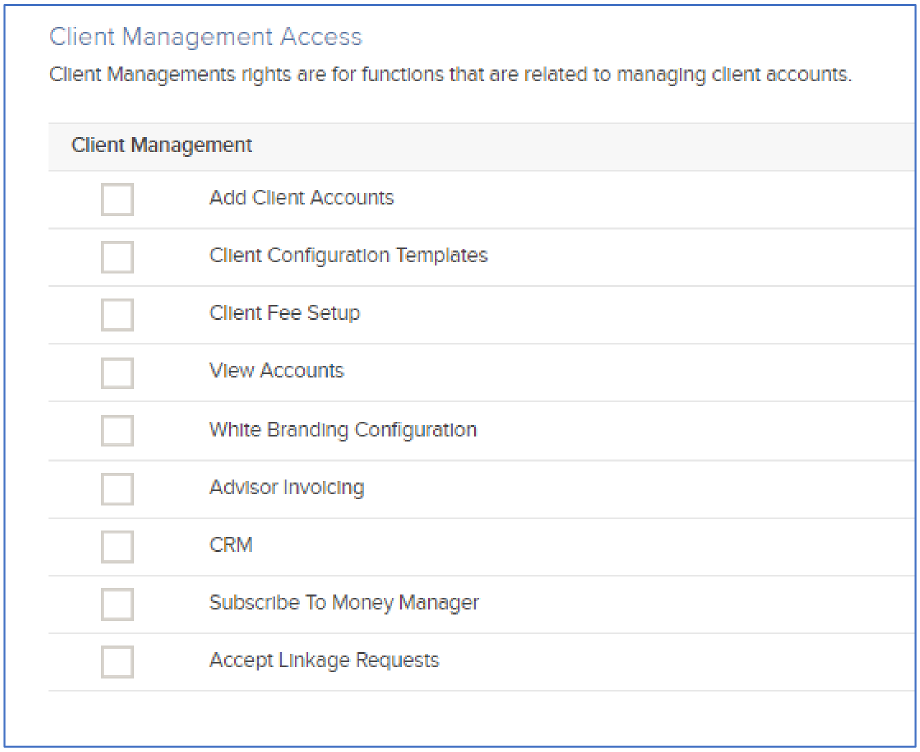
Reporting rights are related to functions within the Reporting menu.

Statements	
[x]	Activity Downloads
[x]	Activity Flex Queries
[x]	Activity Statements
[x]	Trade Confirmation Reports
[x]	Trade Confirmation Flex Queries
[x]	Quarterly Summaries
[x]	Flex Web Service

Other Reports	
[ ]	Advisor Broker Summaries
[ ]	Advisor Fee Capabilities
[x]	Margin Reports
[ ]	Stress Test Reports
[ ]	Value At Risk Report
[ ]	Transaction Cost Analysis

Settings	
[ ]	Delivery Settings For All Reports
[ ]	SMS Alerts

PortfolioAnalyst	
[x]	PortfolioAnalyst
[ ]	External Accounts



- Make all your selections and then click **Continue**.
- An email will be sent to you containing a Confirmation Number, that must be entered to complete the addition of a User Role.
- Enter the number and click Continue, and then click OK to save the new User Role, which will now appear when you revert to Users & Access Rights.