



Traders' Academy Online Courses



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.

The screenshot displays the InteractiveBrokers Advisor Portal interface. On the left is a dark blue sidebar with navigation options: Home, Trading, Reports, Transfer & Pay, Settings (selected), Account Settings, User Settings, Investors' Marketplace, and Support. Below the sidebar is a 'Classic AM' button. The main content area is divided into two columns. The left column shows 'Financial Information' with a table:

Financial Information	
Annual Net Income	240,000 - 469,999 USD
Net Worth	470,000 - 939,999 USD
Liquid Net Worth	240,000 - 469,999 USD
Investment Objectives	Growth, Trading Profits

The right column contains various configuration settings, each with a gear icon. These include: Base Currency: USD, Commissions Pricing Structure, Paper Trading Account, White Branding: INVICO012, Audit Trail, IB FYI, Investor Category, Create, Move, Link or Partition an Account, Close Account, Large Trader ID, Regulatory Information, Manage Administrators, Trading Restrictions, Debitcard Signup for Clients, Registration Information, Section 13, Money Manager, Client Questionnaire Editor, and Professional Advisor Qualification. Below these is a 'Reporting' section with Flex Web Service, Third-party Services, and Trader ID. At the bottom of the right column is the 'Users & Access Rights' panel, which is highlighted with a green box and a green arrow. This panel shows a list of users: davefa123 and ibhood456. The footer of the page includes '© 2019 Interactive Brokers LLC' and a 'FEEDBACK' button.

- 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.

Users				+	?
				✎	✕
<i>i</i>	davefat23			✎	✕
<i>i</i>	ibhood456	Pending	Non Employee	✎	✕

User Roles				+	?
<i>i</i>	officer				✕
<i>i</i>	Account Hero				✕

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.

Trading Access
Trading rights are related to trading platforms and/or post-trade allocations.

QuickTrade, TWS and WebTrader

QuickTrade, TWS and WebTrader

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

Funding Access
Funding rights are related to functions within the Funding menu.

Transfer Funds

Deposits

Withdrawals

Internal Fund Transfers

Recurring Transactions

Transfer Positions

Position Transfers

Saved Information

Settlement Instructions

Transaction History

Transaction History

Reporting Access

Reporting rights are related to functions within the Reporting menu.

Statements	
<input checked="" type="checkbox"/>	Activity Downloads
<input checked="" type="checkbox"/>	Activity Flex Queries
<input checked="" type="checkbox"/>	Activity Statements
<input checked="" type="checkbox"/>	Trade Confirmation Reports
<input checked="" type="checkbox"/>	Trade Confirmation Flex Queries
<input checked="" type="checkbox"/>	Quarterly Summaries
<input checked="" type="checkbox"/>	Flex Web Service
Other Reports	
<input type="checkbox"/>	Advisor Broker Summaries
<input type="checkbox"/>	Advisor Fee Capabilities
<input checked="" type="checkbox"/>	Margin Reports
<input type="checkbox"/>	Stress Test Reports
<input type="checkbox"/>	Value At Risk Report
<input type="checkbox"/>	Transaction Cost Analysis
Settings	
<input type="checkbox"/>	Delivery Settings For All Reports
<input type="checkbox"/>	SMS Alerts
PortfolioAnalyst	
<input checked="" type="checkbox"/>	PortfolioAnalyst
<input type="checkbox"/>	External Accounts

Client Management Access

Client Managements rights are for functions that are related to managing client accounts.

Client Management

- | | |
|--------------------------|--------------------------------|
| <input type="checkbox"/> | Add Client Accounts |
| <input type="checkbox"/> | Client Configuration Templates |
| <input type="checkbox"/> | Client Fee Setup |
| <input type="checkbox"/> | View Accounts |
| <input type="checkbox"/> | White Branding Configuration |
| <input type="checkbox"/> | Advisor Invoicing |
| <input type="checkbox"/> | CRM |
| <input type="checkbox"/> | Subscribe To Money Manager |
| <input type="checkbox"/> | Accept Linkage Requests |

- 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.