Adding a Draft User and Setting Them Live

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Click the profile icon near the top right of the dashboard and then click the 'Admin' button in the drop-down Profile box.

iame*			Status*	
Draft User			Draft	-
Imail*				
draft.user@wspt.co.uk				
kotification Email				
Administrator ⊃No ⊛Yes		Allow Reporting O No ® Yes		
Add Team		Configurations per Team		
All Risks	-	Template Manager X		
Marine	•	Reviewer ×		
Aviation	•	Reviewer × Self Approver × Template Mar	ager ×	

Please note that 'Template Manager' is a team permission that only applies to broker users. (Re)insurer users will not see this team option.

Fill in the user's name and email address, toggle Admin and Reporting permission if required, and optionally click the 'Add Teams' button to add one or more teams with permissions as appropriate. When the user is configured, click 'Confirm' to continue.
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USERS

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In the Admin Portal, click on the 'Users' button in the black sidebar to open the Users Panel.

Add New Oser	whicad List of Users Download Cavile	Browse Ca	V File	Upicad			Search	Q
Name	Email	Notification	Teams	Reporting	Admin	Status 🔻	Invite	
Pending Invite Test	broker.magda@wspt.co.uk	No	1	NO	YES	Draft	Pending Response	8
Cayce Hubbard	broker.tim@wspt.co.uk	Yes	7	YES	YES	Live	Active	×
Melanie Dedopulos	broker.dedopulos@wspt.co.uk	Yes	3	NO	YES	Live	Active	×
False Email Test	tumbleweeds@gmail.com	No	0	NO	NO	Suspended	Incorrect Domain	×
Magda Downing	broker.downing@wspt.co.uk	No	3	NO	NO	ReadOnly	Not Invited	×
Elizabeth Burberry	broker.elizabeth@wspt.co.uk	No	1	NO	NO	Draft	Not Invited	×
Simone Power	broker.simone@wspt.co.uk	No	2	NO	NO	Live	Pending Response	×
Denise Duchesne	broker.denise@wspt.co.uk	No	2	NO	NO	ReadOnly	Pending Response	×
Sally Howells	broker.sally@wspt.co.uk	No	1	NO	NO	Suspended	Not invited	×
Draft User	draft.user@wspt.co.uk	No	3	YES	YES	Draft	Not Invited	

All changes confirmed in the Admin portal are considered pending until saved. You **must** click the blue 'Save' button in the bottom right corner to actually finalise the changes. The new user will then receive an invite email to log in to the Platform.



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Click on the drop-down 'Status' box and select 'Draft' from the list of options.



For a full guide to adding and editing users, including adding very basic user profiles in bulk, please see the comprehensive <u>Admin Portal</u> <u>Guide</u> on our user guides page, whitespace.co.uk/ user-guides

To change the user's status from 'Draft' to 'Live', click the pen-and-paper icon at the far right of their Users Pane entry to open the 'Edit User' box, then click on the 'Status' drop-down and select 'Live'. Remember to click 'Confirm' and 'Save' to finalise the change.



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