

Creating and Managing Administrative Accounts

Last Modified on 04/11/2016 10:00 pm MST

Establishing the First Organization Administrator

In order to begin working with DecisionDirector, a newly subscribing organization will need to designate a person to be the Organization Administrator and then provide the email address of that person to [Advantiv customer support](#).

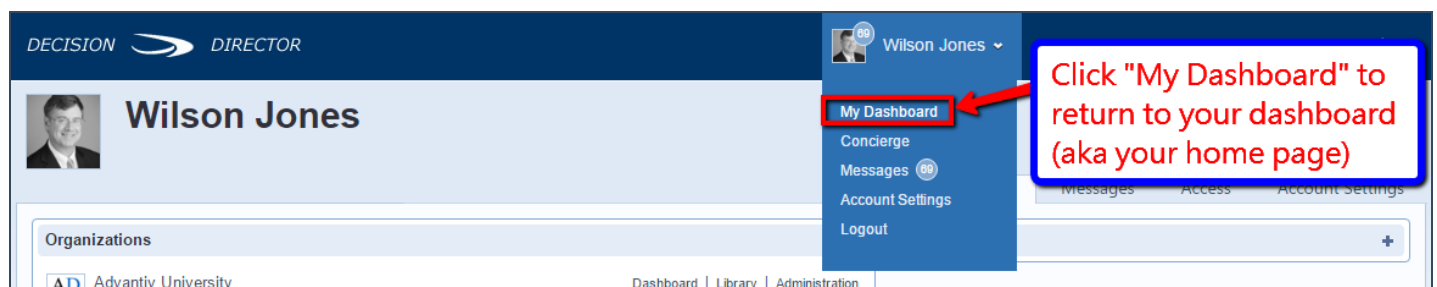
Advantiv will create this assignment, and that individual will receive an email invitation with a subject line that begins with "Access Request". Upon acceptance, that individual's DecisionDirector account will have the [Admin1](#) role for the Organization.

Accounts with the Organization Admin1 (and also the [Admin2](#)) role can assign others, and themselves, any necessary administrative role(s) for the organization, workspaces, and activities.

Assigning Administrative Roles

Administrative role assignment takes place through the **Administration tab** or link of an organization, workspace or activity (generically referred to as "entities").


The easiest way to get to the Administration link(s) is through **My Dashboard**.



The screenshot displays the user interface for Wilson Jones. The top navigation bar includes the 'DECISION DIRECTOR' logo. The user's name 'Wilson Jones' is prominently displayed next to a profile picture. A dropdown menu is open, showing options: 'My Dashboard', 'Concierge', 'Messages' (with a notification badge), 'Account Settings', and 'Logout'. A red box highlights the 'My Dashboard' option, with a red arrow pointing to it. A callout box with a blue border and red text says: 'Click "My Dashboard" to return to your dashboard (aka your home page)'. Below the user profile, the 'Organizations' section shows 'Advantiv University' with a small 'AD' icon. At the bottom, there are navigation links for 'Dashboard', 'Library', and 'Administration'.

 **Wilson Jones**


Organizations -

 **Advantiv University**
Top Level Organization

[Dashboard](#) | [Library](#) | [Administration](#)


Advantiv University

Workspaces -

 **Student System Replacement Project - 2016**
Organization: [Advantiv University](#)


[Dashboard](#) | [Library](#) | [Administration](#)

Planning and selection project

 **HR/Payroll RFP Project - 2015**
Organization: [Advantiv University](#)

[Dashboard](#) | [Library](#) | [Administration](#)

This workspace supports the 2015 Advantiv University HR/Payroll RFP project.


 **Finance System Replacement - 2016**
Organization: [Advantiv University](#)

[Dashboard](#) | [Library](#) | [Administration](#)

Planning and selection project to replace legacy Finance System.


Users +

Activities (8 of 12 most frequently accessed) [View all 12 Activities](#) -

 **ADVU Student System - Requirements Review**
Organization: [Advantiv University](#) > Workspace: [Student System Replacement Project - 2016](#)

[Dashboard](#) | [Collaborate](#) | [Workflow](#) | [Administration](#)

Gather requirements input and feedback from stakeholders, and solicit questions and suggestions to the project team.

 **ADVU HR Stakeholder Requirements Review**
Organization: [Advantiv University](#) > Workspace: [HR/Payroll RFP Project - 2015](#)

[Dashboard](#) | [Collaborate](#) | [Workflow](#) | [Administration](#)

This activity allows invited stakeholders to review and refine detailed functional requirements.

This is Wilson Jones' dashboard. He has the Admin1 role for his organization and, therefore, all workspaces and activities.

Accessing the Administration Page

DECISION DIRECTOR Wilson Jones Quick Nav Learn More Support

AD VU Workspace: Student System Replacement Project - 2016
Organization: Advantiv University

Administration Configuration

Administration

Edit Workspace
Activities
Account Permissions
Lookups
Response Definitions
Tags
Tokens

Update or modify the Student System Replacement Project - 2016 workspace.

Activities
Create, modify, or access the activities within the Student System Replacement Project - 2016 workspace.

Account Permissions
Create, modify, or review account permissions for the Student System Replacement Project - 2016 workspace.

Lookups
Create, modify, or review field lookup values for the Student System Replacement Project - 2016 workspace.

Response Definitions
Create, modify, or review response definition templates for the Student System Replacement Project - 2016 workspace.

Tokens
Create, modify, or review master list of text replacement tokens for the Student System Replacement Project - 2016 workspace.

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use Powered by the DecisionDirector® platform

Clicking the Administration link on your dashboard will take you to the Administration page.

To assign administrative roles, click the Account Permissions link.

Account Permissions Page

DECISION DIRECTOR Wilson Jones Quick Nav Learn More Support

AD VU Workspace: Student System Replacement Project - 2016
Organization: Advantiv University

Administration Configuration

Account Permissions

Roles Explained **Create**

First Name	Last Name	Email	Access (Inherited) Roles	Access (Assigned) Roles	Status	Status Change On	
Robert	Black	rblack@advantiv.com	Admin1 Engagement Host				+
Dan	Miller	dmiller@advantiv.com	Admin1 Content Manager Content Integrator				+
David	McCurdy	dmccurdy@advantiv.com	Admin1 Content Manager	Content Editor Admin2	Invited	4/10/2016 12:03 AM	✎ 🗑
Wilson	Jones	wjones@dddemo.com	Admin1 Content Manager Content Integrator Engagement Host				+
Chuck	Kulesa	ckulesa001@dddemo.com	Content Editor Content Integrator				
Joanne	Griffen	jgriffen001@dddemo.com	Admin1 Content Manager Content Editor UserAdmin Content Integrator Engagement Host				
Victor	Piwnica	vpiwnica001@dddemo.com	Content Manager Content Editor				

Copyright © 2016, Advantiv Solutions, LLC. | Terms of Use Powered by the DecisionDirector® platform

To add a new administrator, click the Create button

A number of administrators already exist for this workspace. Most due to administrative roles inherited from their assignment at the organization level.

Enter the Email Address of the Person to be Assigned an Administrative Role



Workspace: Student System Replacement Project - 2016

Organization: [Advantiv University](#)

Dashboard Library Administration Configuration

Administration

- Edit Workspace
- Activities
- Account Permissions
- Lookups
- Response Definitions
- Tags
- Tokens

Account Permissions

Selected Account: [New Account Placeholder]

[Account Permissions Listing](#) [Roles Explained](#) [Save](#) [Cancel](#)

* Email:

[Continue](#)

Enter the email address of the person you wish to add as an administrator

Select Desired Administrative Roles



Workspace: Student System Replacement Project - 2016

Organization: [Advantiv University](#)

Dashboard Library Administration Configuration

Administration

- Edit Workspace
- Activities
- Account Permissions
- Lookups
- Response Definitions
- Tags
- Tokens

Account Permissions

Selected Account: [New Account Placeholder]

Account Permissions Listing Roles Explained Save Cancel

* Email: dd5500@dddemo.com

* Roles

- | Assigned |
|---|
| <input checked="" type="checkbox"/> Admin1 |
| <input type="checkbox"/> Admin2 |
| <input checked="" type="checkbox"/> Content Editor |
| <input type="checkbox"/> Content Integrator |
| <input checked="" type="checkbox"/> Content Manager |
| <input type="checkbox"/> Engagement Guest |
| <input type="checkbox"/> Engagement Host |
| <input type="checkbox"/> ReportViewer |
| <input type="checkbox"/> UserAdmin |
| <input type="checkbox"/> Viewer |

- | Inherited |
|---|
| <input type="checkbox"/> Admin1 |
| <input type="checkbox"/> Admin2 |
| <input type="checkbox"/> Content Editor |
| <input type="checkbox"/> Content Integrator |
| <input type="checkbox"/> Engagement Host |
| <input type="checkbox"/> ReportViewer |
| <input type="checkbox"/> UserAdmin |
| <input type="checkbox"/> Viewer |

Select desired roles

Message to Account

* Title: ACCESS REQUEST -> Student System Replacement Project - 2016 workspace

You have been granted access to support the Student System Replacement Project - 2016 workspace. In order for this access to take effect, you will need to Accept it. If you are unable or unwilling to accept, you may Decline.

Enter a personal note, if desired

Additional Text

Hoping you can help me manage this project.

Click Save

Save Cancel

Return to Administrative Roles Page



Workspace: Student System Replacement Project - 2016

Organization: [Advantiv University](#)

Dashboard Library Administration Configuration

Administration

- Edit Workspace
- Activities
- Account Permissions
- Lookups
- Response Definitions
- Tags
- Tokens

Account Permissions

[Roles Explained](#) [Create](#)

First Name	Last Name	Email	Access (Inherited)	Access (Assigned)				
			Roles	Roles	Status	Status Change On		
Robert	Black	rblack@advantiv.com	Admin1 Engagement Host					
Dan	Miller	dmiller@advantiv.com	Admin1 Content Manager Content Integrator					
David	McCurdy	dmccurdy@advantiv.com	Admin1 Content Manager	Content Editor Admin2	Accepted	4/11/2016 8:48 AM		
Wilson	Jones	wjones@dddemo.com	Admin1 Content Manager Content Integrator Engagement Host					
Chuck	Kulesa	ckulesa001@dddemo.com	Content Editor Content Integrator					
Joanne	Griffen	jgriffen001@dddemo.com	Admin1 Content Manager Content Editor UserAdmin Content Integrator Engagement Host					
Victor	Piwnica	vpiwnica001@dddemo.com	Content Manager Content Editor					
Donna	Williams	dd5500@dddemo.com	Admin1 Content Manager Content Editor		Invited	4/11/2016 9:36 PM		

See the new invitation

The invitation has been sent. An email will be sent to you when the person responds.