

REP SSO PERMISSIONS ASSIGNMENT

- 1) Log in to Edocs
- 2) Select the Single Sign On Tab to display the SSD Menu

Division Center Switch To Rep (Perm) **Single Sign On** Account Info AppDocs Feedback Associates Log Off

Full Name: **Steven Sherrill** Days Until Password Reset: **N/A** Is Web Active: **No**
 User Name: **steven** Web URL: **ssherrill** Is Compliance Active: **No**
 Email Address: **ssherrill@moneyconcepts.com** Permission Level: **Read_Write** Logged In As: **Rep**

Single Sign Ons Available To You

| Sign On | | Name | Permission | Password |
|---------|-------------------|-----------------|--------------------------|----------|
| Sign On | Update Permission | Forefield | Owner Only | |
| Sign On | Update Permission | WebMail | Both Assistants As Owner | |
| Sign On | Update Permission | MailAdmin | Both Assistants As Owner | |
| Sign On | Update Permission | RedTail | Owner Only | |
| Sign On | Update Permission | MorningStar_AIR | Owner Only | |

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- 3) Select the drop down next to the SSO permission which is to be modified.

Permission

Owner Only

Both Assistants As Owner

Finger Printed Assistant Only As Owner

Licensed Assistant Only As Owner

Owner Only

Owner Only

03.10

Both Assistants as Owner: Allows Licensed and NRF admins to access the system

Fingerprinted Assistant Only: Allows NRF admins only to access the system

Licensed Assistant Only: Allows Licensed person working as an admin to access the system

Owner Only: Only the Registered Rep may accessed the system

- 4) Assign a Permission Level for the SSO System being modified. This will close the drop down, and the modified permission will appear in a dark blue color.

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Full Name: **Steven Sherrill** | Days Until Password Reset: **N/A** | Is Web Active: **No**
User Name: **steven** | Web URL: **ssherrill** | Is Compliance Active: **No**
Email Address: **ssherrill@moneyconcepts.com** | Permission Level: **Read_Write** | Logged In As: **Rep**

Single Sign Ons Available To You

| Sign On | | Name | Permission | Password |
|---------|-----------------------------------|-----------------|--------------------------|----------|
| Sign On | Update Permission | Forefield | Owner Only | |
| Sign On | Update Permission | WebMail | Both Assistants As Owner | |
| Sign On | Update Permission | MailAdmin | Both Assistants As Owner | |
| Sign On | Update Permission | RedTail | Both Assistants As Owner | |
| Sign On | Update Permission | MorningStar_AIR | Owner Only | |

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Permission level selected, not applied to the system

- 5) Select Update Permission to apply the permission change.

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Full Name: **Steven Sherrill** | Days Until Password Reset: **N/A** | Is Web Active: **No**
User Name: **steven** | Web URL: **ssherrill** | Is Compliance Active: **No**
Email Address: **ssherrill@moneyconcepts.com** | Permission Level: **Read_Write** | Logged In As: **Rep**

Single Sign Ons Available To You

Permission Object Has Been Updated!

| Sign On | | Name | Permission | Password |
|---------|-----------------------------------|-----------------|--------------------------|----------|
| Sign On | Update Permission | Forefield | Owner Only | |
| Sign On | Update Permission | WebMail | Both Assistants As Owner | |
| Sign On | Update Permission | MailAdmin | Both Assistants As Owner | |
| Sign On | Update Permission | RedTail | Both Assistants As Owner | |
| Sign On | Update Permission | MorningStar_AIR | Owner Only | |

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New Permission has been assigned and the system has been updated.

- 6) Verify that the admins allowed access are able to sign in to the system for which permissions have been granted.