IIA Group Admin Portal User Manual

Group Account Administrators

This step-by-step guide provides instructions for adding and removing group administrators.

What Is a Group Account Administrator

A group account administrator is an individual who has permission to access the IIA Admin Portal, manage the organization's group roster, complete purchases, and manage quotes & invoices.

The instructions below REQUIRE a current group administrator to complete. If the current group administrator is no longer with your organization, please contact CustomerRelations@theiia.org.
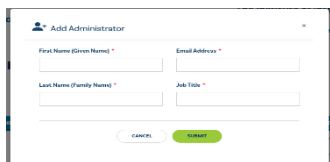
Access the IIA Group Admin Portal at https://adminportal.theiia.org/.

Add A Group Administrator

1. On the dashboard, click on the **Account Administrators** located under Account Management.

    Account Management

    Account Information
    Billing Address
    Shipping Address
    Account Administrators ←
    Account Roster

2. Click the green **Add Administrator** button

3. Complete the pop-up and click **Submit**.

    Add Administrator

    First Name (Given Name) *   Email Address *

    Last Name (Family Name) *   Job Title *

    CANCEL   SUBMIT

    Important Note: **The individual you added as an Account Administrator will receive an email that requires confirmation of their new role. Until the individual confirms, their status as a new administrator is pending and unable to access the Admin Portal.**

    If the individual you add as an administrator is already listed as ACTIVE on your organization's roster, they will not receive the confirmation email. Once the account administrator set up is complete, the individual listed as ACTIVE will automatically have access as an account administrator.

Remove a Group Administrator

1. On the dashboard, click on the **Account Administrators** located under Account Management.
2. Identify the group administrator and click the **Delete** button.

> **Note:** You cannot delete yourself. If you need assistance switching the main account administrator, please contact CustomerRelations@theiia.org.

3. Confirm the removal of administration and click the red **Proceed** button.

Account Management

Account Information
Billing Address
Shipping Address
Account Administrators
Account Roster

ACTIONS

Edit / Delete

Once deleted, this action cannot be undone.
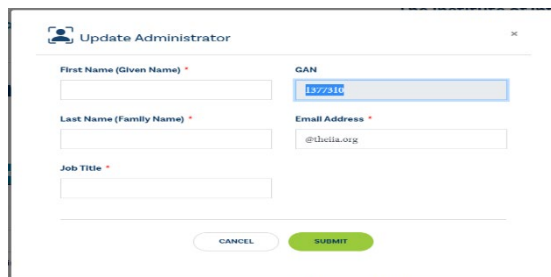
Are you sure you want to proceed?

CANCEL   PROCEED

Edit An Account Administrator

1. On the dashboard, click on the **Account Administrators** located under Account Management.

2. Identify the group administrator and click the **Edit** button.

3. Edit the administrator's details and click **Submit.**

Account Management

Account Information
Billing Address
Shipping Address
Account Administrators
Account Roster

Edit / Delete

Update Administrator

First Name (Given Name) *   GAN
                                   1377310

Last Name (Family Name) *   Email Address *
                                   @theiia.org

Job Title *

CANCEL   SUBMIT

Note: You cannot edit an individual's GAN (Global Account Number). If an admin has more than 1 profile & GAN, please contact CustomerRelations@theiia.org for assistance merging the duplicate accounts.