



IIA Group Admin Portal User Guide

Managing Your Organization's Group Membership

This guide provides instructions for managing your organization's group membership.

To inquire about establishing a new IIA group account, please complete the [Group Services Inquiry Form](#).

Table of Contents

The Table of Contents is designed with hyperlinks, allowing you to seamlessly jump to a section within the guide with a single click.

IMPORTANT INFORMATION – READ FIRST!	3
Authorized User Permission	3
Technical Requirements	3
WAF Errors.....	3
Supported Browsers	3
Supported Operating Systems.....	3
Recommended Display (Screen).....	3
ACCESS THE ADMIN PORTAL	4
IIA ADMIN PORTAL DASHBOARD - OVERVIEW	4
PART ONE: ACCOUNT MANAGEMENT	5
MANAGE ORGANIZATION’S CONTACT INFORMATION	5
Update Business Phone Number	5
Update Billing Address	5
Update Shipping Address	5
ACCOUNT ADMINISTRATORS	6
Add An Account Administrator.....	6
Remove An Account Administrator	6
Edit An Account Administrator	6
PART TWO: MANAGE ACCOUNT ROSTER	7
Remove an individual from the roster	7
Add new individual(s) to the roster.....	7
Edit An Individual on the Account Roster.....	8
Download Account Roster to Excel	8
PART THREE: MANAGE GROUP MEMBERSHIP	9
Membership Dashboard Overview.....	9
Assign Membership	10
Remove (Vacate) Membership.....	10
Substitute a Slot	10
Purchase Additional Slots	11
PART FOUR: CREATE AN ORDER AND COMPLETE PAYMENT	11
Create a quote – Optional	11
Convert quote to order and complete payment	12
Create an order and submit payment by credit card	12
Create an order and complete payment via wire transfer, ACH or check.....	13
ASSIGN MEMBERSHIP SLOTS	13

Important Information – Read First!

Authorized User Permission

Only individuals with the Account Administrator role (also known as the Group Admin) for your organization’s IIA account will have access to the IIA Admin Portal. If you are currently an account administrator, please refer to the [Account Administrators](#) for instructions on how to authorize others on your rosters as account administrators.

If account administrators are no longer with your organization and you need to update who will be the main account administrator, please email CustomerRelations@theiaa.org.

Technical Requirements

In order to have an optimal experience while using the Admin Portal, you will need to adhere to the following browser and operating system requirements.

WAF Errors

A web application firewall (WAF) protects web applications from a variety of application layer attacks such as cross-site scripting (XSS), SQL injection, and cookie poisoning, among others. If you receive a WAF error, this could be due to having too many cookies in your history. Please try clearing your cache after closing all windows in your browser bar, then reopening the browser bar and make your attempt again. Should you still continue to receive a WAF error code, please check with your company’s IT department to ensure it is not a firewall issue on your end.

Supported Browsers

Browser	Supported Versions
Google Chrome	76 or higher
Microsoft Edge	44 or higher

Supported Operating Systems

Operating System	Version
Microsoft Windows	7 or higher
Mac OS	X or higher

Recommended Display (Screen)

You will need a display (screen) that has a minimum resolution width of 880 pixels. Please note that while it may be possible to still use the Admin Portal on a browser or operating system not listed above, many parts of the Admin Portal functionality you experience may be degraded and render the Admin Portal unusable. It is highly recommended to use the platforms listed above for optimal user experience.

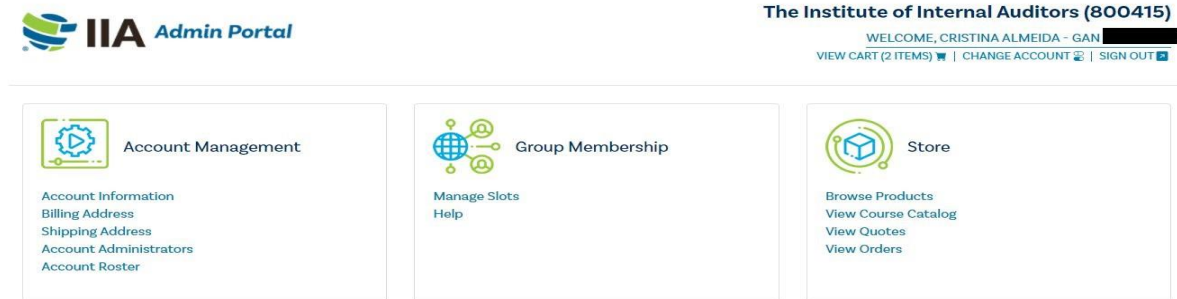
Access The Admin Portal

Visit adminportal.theiia.org and log in with your individual MyIIA credentials.

Visit resetpassword.theiia.org to reset your account password

Unable to access or recall your log in email? Contact CustomerRelations@theiia.org

IIA Admin Portal Dashboard - Overview



The screenshot shows the IIA Admin Portal dashboard. At the top left is the IIA Admin Portal logo. At the top right, it says "The Institute of Internal Auditors (800415)" and "WELCOME, CRISTINA ALMEIDA - GAN" followed by a redacted name. Below the name are links for "VIEW CART (2 ITEMS)", "CHANGE ACCOUNT", and "SIGN OUT". The dashboard is divided into three main sections: "Account Management" (with sub-links: Account Information, Billing Address, Shipping Address, Account Administrators, Account Roster), "Group Membership" (with sub-links: Manage Slots, Help), and "Store" (with sub-links: Browse Products, View Course Catalog, View Quotes, View Orders).

Account Management

Account Roster: A list of individuals affiliated with your organization. This roster contains both members and NON-members who are affiliated with your organization. This list will also include account administrators.

Billing Address: View and update organization's billing address.

Shipping Address: View and update organization's shipping address.

Account Administrators: Manage who has administrative authority over the group account.

Group Membership

Manage Slots: Assign, Vacate, and Substitute individuals from Membership Slots.

Help: Links to the Admin Portal User Guides page.

Store

Browse Products: Purchase Membership, Learning, Books, and Event Registrations.

View Course Catalog: View IIA's current Competency and Learning Course Catalog.

View Quotes: Review quotes generated by an account admin for potential purchases.

View Orders: View recent and pending orders. For purchases completed before 1/31/22, contact CustomerRelations@theiia.org for receipts.

Part One: Account Management

Manage Organization's Contact Information

Update Business Phone Number

1. On the dashboard, click on **Account Information**.
2. Under Business Phone, enter the correct phone number.
3. Click **Save** on the bottom right-hand corner of the screen.

To update the Account Name, Account Type, and Industry, please send a written request to CustomerRelations@theiia.org



Update Billing Address

1. On the dashboard, click on **Billing Address**.
2. Update the organization's billing address.
3. Click **Save** on the right-hand corner of the screen.

Update Shipping Address

1. On the dashboard, click on **Shipping Address**.
2. Update the organization's shipping address.
3. Click **Save** on the right-hand corner of the screen.

Account Administrators

An account administrator is an individual who has permission to access the IIA Admin Portal, manage the organization's account roster, complete purchases, and manage quotes & invoices. The Account Administrator is also known as a Group Administrator. You may assign multiple administrators. An account administrator does not need to occupy a membership slot to have admin access in the portal.



Add An Account Administrator

1. On the dashboard, click on **Account Administrators**.
2. Click the green **Add Administrator** button.
3. Complete the information of the individual you would like to add and click **Submit**.

Important Note: The person you added as an account administrator will receive an email that notifies them of their new role as administrator. If a person you add as an administrator is already listed as ACTIVE on your organization's roster, they will not receive an email. Once you submit the account administrator request, the person listed as ACTIVE should automatically show up as an account administrator.

Remove An Account Administrator

1. On the dashboard, click on **Account Administrators**.
2. Identify the administrator to be removed and click the **Delete** button on the right side of their row.
3. Confirm that the administrator you are removing is correct and click the red **Proceed** button.

Note: *You cannot remove yourself as an administrator.*

Edit An Account Administrator

1. On the dashboard, click on **Account Administrators**.
2. Identify the administrator and click the **Edit** button on the right side of their row.
3. Edit the administrator's information and click **Submit**.

Note: *You cannot edit an individual's Global Account Numbers (GAN).*

Part Two: Manage Account Roster

The Account Roster is a complete listing of individuals added in the Admin Portal by your organization. This includes members, non-members, and account administrators. You can make purchases on behalf of anyone listed here.



Remove an individual from the roster

1. On the dashboard, click on **Account Roster**.
2. Locate the individual on the list and click **Delete**, located on the right-hand side of page of line, to remove them from the roster.

Important Note: *If a membership has been assigned, the slot must be vacated before you can remove the individual. That slot cannot be re-used for another person.*

3216200	Cristina	Almeida	IIA HQ Staff	N	Active	
---------	----------	---------	--------------	---	--------	---

Add new individual(s) to the roster

This instruction guide is recommended for submitting one individual at a time. Have a handful of new additions? Check out the [“How to add individuals to the roster – bulk upload”](#).

1. On the dashboard, click on **Account Roster**.
2. Click on the green **Add to Roster** button.
3. Complete the required fields with the individual’s information.
4. Click **Submit**.

Important Note: *Please verify if the individual has held a previous membership; and if yes, confirm the existing primary email on their account. If they are registered with a different email, the system will create a new profile and will **NOT** link their certifications and membership history.*

If a team-member reports having two profiles, direct them to email CustomerRelations@theiia.org for an account merge request.

Edit An Individual on the Account Roster

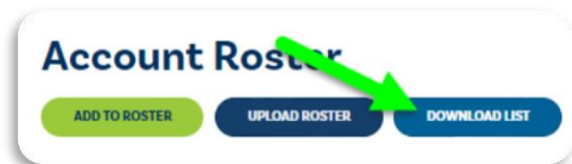
1. On the dashboard, click on **Account Roster**.
2. Identify the individual and click the **Edit** button on the right side of their row.
3. Edit the individual's information and click **Submit**.

You cannot edit an individual's Global Account Numbers (GAN).

3216200	Cristina	Almeida	IIA HQ Staff	N	Active		Edit / Delete
---------	----------	---------	--------------	---	--------	---	---------------

Download Account Roster to Excel

1. On the dashboard, click on **Account Roster**.
2. Click on the blue **Download List** button.

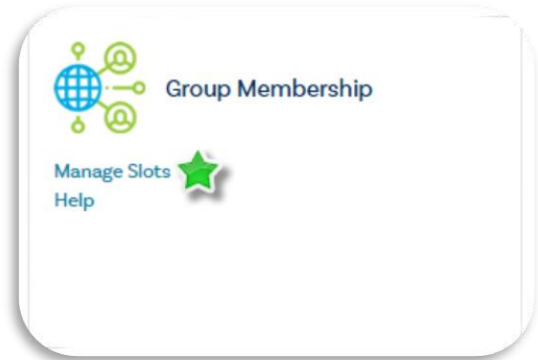


Anti-virus software installed on computers may prevent list or template download.

Part Three: Manage Group Membership

Manage Membership through Manage Slots. For those staff who should have IIA membership, you will need to have a membership slot assigned to them under Manage Slots. You can also unassign and manage substitutions in this module.

[Membership Dashboard Overview](#)



Account Slot Information ▼

It takes 1-2 minutes to fulfill the order before the Slots Purchased and Available Slots increase. Please [refresh](#) the page until you see the changes.

Executive Slot: Unassigned [ASSIGN](#)

Membership Term: 01/Dec/2023 - 30/Nov/2024 [ADD SLOTS](#)

Available Slots: 7	Purchased Slots: 230	Available Substitutions: 5
--------------------	----------------------	----------------------------

Executive Slot: If your group purchased Executive Expanded or Executive All-Access, here is where you will assign your organization’s CAE. For more information on this add-on membership essential to CAE’s, [visit our website](#).

Membership Term: Your organization active membership dates. The renewal window will open 60 days prior to the expiration date.

Add Slots: Purchase prorated membership slots throughout your organization’s term as needed. Membership dues are prorated daily.

Available Slots: The number of memberships slots available to assign to your staff

Purchased Slots: This number is cumulative of memberships purchased throughout the membership term.

Available Substitutions: Each group is provided a number of one-time use substitutions throughout the membership term.

Important Note: *This dashboard does not include the number of vacated memberships throughout the term. Membership slots are a one-time use. Once available substitutions have been used, Available Slots will remain 0, and prorated slots will need to be purchased.*

Assign Membership

1. On the dashboard, click **Manage Slots**.
2. Scroll down on page to Roster and click the radio button next to the name of the person(s) you wish to add from the list.
3. Click **Assign Slot**

Note: You can select multiple boxes at once

ASSIGN ^	GAN	FIRST NAME
<input type="checkbox"/>	6001781	Cassian
<input checked="" type="checkbox"/>	6001783	Marcus
<input type="checkbox"/>	6001784	Matthew
<input type="checkbox"/>	6001775	Roger

Once you have selected who you want to assign slots to, scroll up and click the green "Assign Slot" button.

ASSIGN SLOT

Remove (Vacate) Membership

1. On the dashboard, click **Manage Slots**.
2. Identify the member you wish to remove and click **VACATE** next to their name.

VACATE	GAN	EXECUTIVE LEVEL	FIRST NAME
Vacate		Executive Level 3 - US	Julie

Substitute a Slot

1. On the dashboard, click **Manage Slots**.
2. If you have any available substitutions listed, you may utilize the substitution by first vacating an existing member from the group.
3. After the slot has been vacated, the Available Substitutions will decrease by 1 and the Available Slots will increase by 1 and ready to be assigned.

Important Note: Once a slot is vacated, it cannot be re-used to add a new member. Each group is allotted a pre-set number of substitutions for the year based on the group size. For example, groups sized 3-30 members are allotted three (3) substitution slots.

Available Slots: 7

Purchased Slots: 230

Available Substitutions: 5

Purchase Additional Slots

1. On the dashboard, click **Manage Slots**.
2. Click **Add Slots**.
3. Update the quantity to desired count and submit.
4. Proceed with checkout through portal.

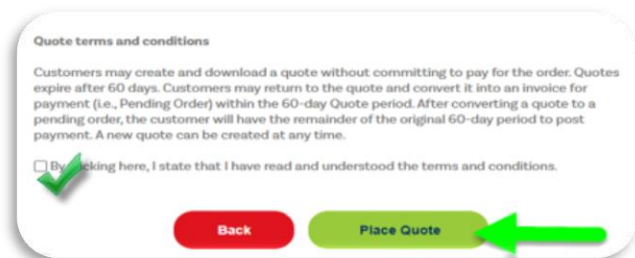


Part Four: Create An Order and Complete Payment

Create a quote – Optional

You can skip this step if you are purchasing via credit card or PayPal and do not need prior approval. Please advance to [Create an order](#).

1. On the dashboard, click **Manage Slots**.
2. Click **Add Slots**.
3. Confirm # of desired slots and add to cart.
4. Proceed with checkout and agree to terms and click checkout again.
5. Click **Additional Options**.
6. Agree to terms and conditions and click **Place Quote**.
7. You may print a PDF copy of the quote by clicking on the link.



Convert quote to order and complete payment

To complete payment for a quote, complete the following steps:

1. Navigate to the dashboard and click on **View Quotes** under Store.
Please ensure you are in the correct account when in the Store. Click the down caret under the “Welcome” on the top-right hand side of the webpage to select the group name.



2. Locate your transaction and click **Details** on the right of the page.
3. Click the green **Place Order** button.
4. Proceed with one of the payment options.

Important Note: Membership slots are available upon completion of payment. If check, wire, or ACH are selected, the membership slots will become available once payment has been received at IIA Headquarters and processed by the Accounting Department.

Create an order and submit payment by credit card

1. On the dashboard, click **Manage Slots**.
2. Click **Add Slots**.
3. Confirm # of desired slots and add to cart.
4. Proceed with checkout online with credit card payment.
5. Once payment is completed, the membership slots will be available, and **MUST** be assigned to your staff.



Please allow up to 5 minutes for the new term dates and membership slots to reflect in the Admin Portal.

Create an order and complete payment via wire transfer, ACH or check

1. On the dashboard, click **Manage Slots**.
2. Click **Add Slots**.
3. Confirm # of desired slots and add to cart.
4. Select a form of payment (Wire Transfer/ACH or Check).



For check payments, please use the following:

Truist Bank, Inc.

PO Box 919460

Orlando, FL 32891-9460

Acct: 1000145155502 Routing: 061000104

For wire transfers and ACH payments, please use the following:

Truist Bank, Inc.

303 East Peachtree St

Atlanta, GA 30308

Account: 1000145155502 Routing: 061000104

SWIFT: SNTRUS3A

5. Once payment has been submitted, please email a copy of the remittance advice and/or payment receipt along with a copy of the order to wirepayments@theiia.org.

Please allow up to 14 business days for your payment to be processed and applied to your account. You will receive an email once payment has been applied to the order by our accounting department.

6. Once payment is completed, the membership slots will be available, and **MUST** be assigned to your members for the new term dates.

Assign Membership Slots

1. Log into the [Admin Portal](#)
2. Click on **Manage Slots**.
3. Scroll down on the page to Roster and click the radio button next to the name of the individual(s).
4. Click **Assign Slot**.

