

# General Use

Last updated: April 22, 2022

## Creating a New User

To create a **New User** in Nolan Cloud Services, you will need to start at the **Home Page** and select the **Admin** option.



## Admin

Manage users, account and billing settings

If this doesn't take you automatically to the user page, choose **Users** from the menu.

The screenshot shows the 'Users' management page in the Nolan Cloud Services Admin interface. On the left is a blue sidebar with the 'Admin' section containing links for 'Account Settings', 'Billing', 'Users', and 'Access Tokens'. The main content area is titled 'Users' and features two orange buttons: 'Search' and 'New'. Below these is a form for 'Email Address' with a dropdown arrow and a 'Cr' label. A 'Results per page' dropdown is set to '10', and a 'Refresh' button with a circular arrow icon is present.

Select **New** and then enter user details into the required fields.

Next, you will also need to assign the **User** a **Role**. **User Roles** determine what aspects of NCS a **User** can access. It is therefore **Important** that **Users** have the correct **Roles** assigned.

To assign a **Role** to a **User** select between the **Search** or **Add** options.

The screenshot displays the 'Roles' management page. It has a header with 'Search' and 'Add' buttons. Below is a search form with three fields: 'Field' (set to 'Role'), 'Operator' (set to 'Like'), and 'Value'. A 'Use simple search' link is on the left, and 'Add Clause' and 'Find' buttons are on the right. The main area shows a table with columns 'Role' and 'Description'. At the bottom, there is a 'Results per page' dropdown set to '10', a 'Refresh' button, and a small icon. A pagination bar at the very bottom indicates 'Viewing: 1 - 0 of 0'.

The **Search** option will bring up the above **Fields** which you can use to find a specific **Role**. The **Roles** which match your search criteria will appear in the list under **Roles**. From here you can select which one you wish to assign to the **User**.

Otherwise, selecting the **Add** option, will bring up a list of **All** existing **Roles**.

Filter	Field	Role	Filter Term
		▼	
<b>Role▼</b>		<b>Description</b>	
<a href="#">Administrator</a>		Global Administrator (Access to Everything)	
<a href="#">Nolan Bank Feeds</a>		Access to Nolan Bank Feeds Module	
<a href="#">VAT Submission</a>		Access to VAT Submission Module	

Here you can select which **Role** to assign to the **User**.

Once you have selected the relevant **User Role**, click **Save**. Your **New User** will now have been created.

## Your Nolan Cloud Services Account – Settings, Billing, & Tokens

We shall now cover the other aspects of Nolan Cloud Services from the **Admin** side.

Selecting the **Admin** option on the NCS **Home Page** will automatically bring you to the **Users** page.



## Admin

Manage users, account and billing settings

On the **Left** of the screen however, you will see some other **Options**.



## Admin

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Account Settings



Billing



Users



Access Tokens

Firstly, we will go over the **Account Settings** section.

Select **Account Settings**, you should now be faced with the screen below.

# Account Settings

Save

## Details

Account Number

Account Name

Contact Name \*

Company Name \*

Address 1 \*

Address 2

Address 3

County

Country \*

Post Code \*

Phone Number \*

Billing Contact Email \*

Account Owner

## Security

Enable 2 Factor  
Authentication

☐

Here you can see all the details of your **Current NCS Account**. There is also the option to activate **Two Factor Authentication** for added security.

Please be aware that only users with **Administrative** roles will be able to access and edit this page.

Next, we will cover **Billing**.

Select the **Billing** option on the **Left** of the screen. You will now be faced with the screen below.

Nolan Cloud Services


Admin

- Account Settings
- Billing**
- Users
- Access Tokens


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## Billing

### Modules



**VAT Submission**  
Status: Active  
Billing Method: On Account  
Licence: 1 VAT Entities  
Contact Nolan Business Solutions to manage your billing for this module



**Nolan Bank Feeds**  
Status: Active  
Billing Method: On Account  
Licence: 1 Bank Accounts  
Contact Nolan Business Solutions to manage your billing for this module

This screen details the **Modules** which are currently **Active** on your **Account**. As you can see for **VAT Submission**, this test account only has a licence for one **VAT Entity**. To discuss all things billing contact Nolan Business Solutions.

Finally, we will discuss **Access Tokens**.

Select the **Access Tokens** option on the **Left** of the screen. You will be faced with the screen below.



Nolan Cloud Services

Admin

- Account Settings
- Billing
- Users
- Access Tokens

## Access Tokens

Search
New

Description▼	Token
NCS Access Token	<a href="#">46dd56b7-f3d0-4c41-ae05-2563dd893321</a>

Results per page 10
Refresh

**Access Tokens** are a security feature. Acting much like a password, they ensure that whichever **Module** you are using has permission to access your Nolan Cloud Services Account.

**Access Tokens** are not unique to each user, but instead to each Nolan Cloud Services Account. At present there should not be a need to generate a **New Token**. This option is accessible however via the **New** button.

You can also view further information on your **Access Token** by clicking the **Token** itself as seen below.

## Access Tokens

Search
New

Description▼	Token
NCS Access Token	<a href="#">46dd56b7-f3d0-4c41-ae05-2563dd893321</a>

This will bring up the following screen with details such as your **Account Number** and full **Account Token**.

# Access Token

Save

Delete

## Details

<b>AccountNumber</b>	TES00005
<b>AccountToken</b>	46dd56b7-f3d0-4c41-ae05-2563dd893321
<b>AccountTokenDesc</b>	NCS Access Token

This concludes this **General Use** section