

General Use

Last updated: April 23, 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. At the bottom of the form area, there is a 'Results per page' dropdown set to '10' and a 'Refresh' button with a circular arrow icon.

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 interface. 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' (empty). To the right of the 'Value' field is a trash icon. Below the search form, there is a link 'Use simple search' and two orange buttons: 'Add Clause' and 'Find' with a magnifying glass icon. At the bottom, there is a table header with 'Role' and 'Description' columns. Below the header is a pagination bar with 'Results per page' set to '10', a 'Refresh' button, a small icon, and a status indicator '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
		▼	
Role▼		Description	
Administrator		Global Administrator (Access to Everything)	
Nolan Bank Feeds		Access to Nolan Bank Feeds Module	
VAT Submission		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



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	46dd56b7-f3d0-4c41-ae05-2563dd893321

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	46dd56b7-f3d0-4c41-ae05-2563dd893321

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

Access Token

Save

Delete

Details

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

This concludes this **General Use** section