



IIA Group Admin Portal User Manual

ACCOUNT MANAGEMENT

This guide will provide instructions for navigating the new IIA Admin Portal including managing your organization's account information, adding and removing group administrators, and managing your group's account roster.

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Overview

This guide provides an overview of how to manage your IIA group account within the IIA Admin Portal. You will see instructions such as:

- How to manage your organization's account information
- How to add, edit and remove account administrators
- How to update the addresses associated with your account
- How to add or remove individuals from your roster (this is before membership can be assigned)

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 section for instructions on how to authorize others on your rosters as account administrators.

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

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

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

Please note that anti-virus software installed on computers may prevent list or template download.


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.

Key Terms

Key Terms	Term		Definition	
	Account Roster	A list of individuals affiliated with your organization. The roster contains both IIA members and non-members who are affiliated with your organization linked by your organization's ID.		
	GAN (Global Account Number)	Unique identifying number associated with an individual's IIA account.		



Navigate To the Account Dashboard

Procedure	Follow the steps below to navigate the account dashboard.	
	Step	Description
	1. Access the Admin Portal 2. Find Account Management	Go to https://adminportal.theiia.org and log in using your IIA credentials. This document, provides guidance for the Account Management section of the dashboard which is located on the left hand side of the screen. <div style="text-align: center;">  <p>Account Management</p> <p>Account Information Billing Address Shipping Address Account Administrators Account Roster</p> </div>
	3. Look at Different Functions	Functions within account management include: <ul style="list-style-type: none"> A. Account Information – View key information pertaining to your account, as well as update your business phone number. B. Billing Address- Edit the address that your group purchases will be billed to. C. Shipping Address- Edit the address that your purchases will be shipped to. D. Account Administrators- Manage who has administrative authority over the group account. E. Account Roster- View /download your roster, add an individual, upload a list of individuals, remove an individual from roster.

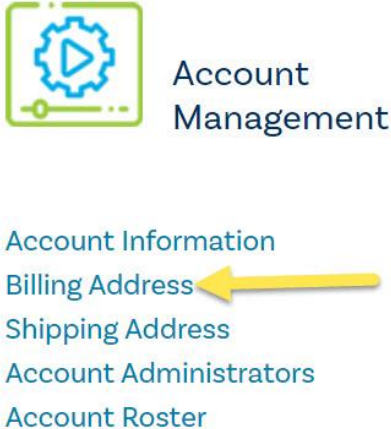

Manage Account Information

Procedure



Follow the steps below to manage account information.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Information	<p>Select "Account Information" under Account Management.</p>  <p>The screenshot shows a green gear icon with a play button inside, labeled "Account Management". Below it is a list of menu items: "Account Information", "Billing Address", "Shipping Address", "Account Administrators", and "Account Roster". A yellow arrow points to "Account Information".</p>
3. View Account Information and Edit Business Phone	Here you can view your organization's Global Account Number, Account Name, Account Type, Industry and Industry Group. You can also view and update your Business Phone.
4. Save Information	<p>Do not forget to select the "Save" button on the bottom right hand corner.</p>  <p>The image shows a green rounded rectangular button with the word "SAVE" in white capital letters.</p>

Update Billing Address

Procedure		Follow the steps below to update billing address.	
Step	Description		
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.		
2. Access Billing Address	Select where it says "Billing Address" under Account Management. 		
3. Update Billing Address	Update your billing address and then select the green "Save" button on the bottom right hand side. 		

Update Shipping Address

Procedure		Follow the steps below to update shipping address.	
Step	Description		
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.		
2. Access Shipping Address	Select where it says "Shipping Address" under Account Management. 		
3. Update Shipping Address	Update your shipping address and then select the green "Save" button on the bottom right hand side. 		



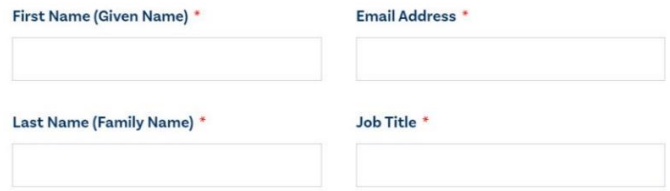
Account Administrators

An account administrator is an individual who has permissions to access the IIA Admin Portal, manage the organization’s account roster, complete purchases and manage quotes & invoices.

Add an Account Administrator

Procedure




Follow the steps below to add an account administrator.


Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Administrators	<p>Under Account Management, select “Account Administrators.”</p>  <p>The screenshot shows a green gear icon with a play button inside, labeled 'Account Management'. Below it are five menu items: 'Account Information', 'Billing Address', 'Shipping Address', 'Account Administrators' (highlighted with a yellow arrow), and 'Account Roster'.</p>
3. Select Add Administrator	<p>Select the green “Add Administrator” button.</p>  <p>The screenshot shows a green rounded rectangular button with the text 'ADD ADMINISTRATOR' in white capital letters.</p>
4. Fill Out Information	<p>Fill out the information of the person you want to add.</p>  <p>The screenshot shows a form with four input fields: 'First Name (Given Name) *', 'Email Address *', 'Last Name (Family Name) *', and 'Job Title *'. Below the form is a green rounded rectangular button with the text 'SUBMIT' in white capital letters.</p> <p>When you are done, select the green “Submit” button below.</p>
5. Confirmation Email	<p>The person you added as account administrator will receive an email that allows them to confirm their new role. Until they confirm, their status as a new administrator is pending.</p> <p>Note: 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.</p>

Remove an Account Administrator

Procedure

Follow the steps below to remove an account administrator.






Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Administrators	<p>Under Account Management, select "Account Administrators."</p>  <p>The screenshot shows a green-bordered box containing a play button icon and the text "Account Management". Below this box are several menu items: "Account Information", "Billing Address", "Shipping Address", "Account Administrators" (highlighted with a yellow arrow), and "Account Roster".</p>
3. Sort/Search Administrators	<p>You will now see a list of current account administrators. You can sort them by name, job title, and email among other categories.</p>  <p>Alternatively, you can search for a specific account administrator using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p>
4. Delete Administrator	<p>When you decide which administrator you want to delete, select the "Delete" button on the right hand side of their row under where it says "Actions."</p> <p>Note: You cannot delete yourself. If you need assistance switching the main account administrator, please contact CustomerRelations@theiia.org.</p>  <p>The screenshot shows a blue button labeled "ACTIONS". Below it, the text "Edit / Delete" is highlighted with a yellow arrow.</p>

	<p>5. Proceed With Deletion</p>	<p>Confirm that the administrator you are attempting to delete is the correct one and once you have confirmed, select the red "Proceed" button on the bottom right hand corner.</p> <p>You are about to delete the administrator for</p> <hr/> <p>Gina Pettiti (Petitti080421@iiauat.org)</p> <hr/> <p>Once deleted, this action cannot be undone.</p> <p>Are you sure you want to proceed?</p> <hr/> <p><input type="button" value="CANCEL"/> <input type="button" value="PROCEED"/></p> 
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Edit Account Administrator

Procedure



Follow the steps below to edit account administrator information.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Administrators	<p>Under Account Management, select "Account Administrators."</p>  <p>Account Management</p> <ul style="list-style-type: none"> Account Information Billing Address Shipping Address Account Administrators ← Account Roster
3. Sort/Search Administrators	<p>You will now see a list of current account administrators. You can sort them by name, job title, and email among other categories.</p>  <p>Alternatively, you can search for a specific account administrator using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p>
4. Select "Edit"	<p>When you decide which administrator you want to edit, select the "Edit" button on the right hand side of their row under where it says "Actions."</p> 
5. Edit Information	<p>Edit the account administrator's information.</p> <p>Note: You cannot edit their GAN.</p>  <p>Then, select the green "Submit" button below.</p> 



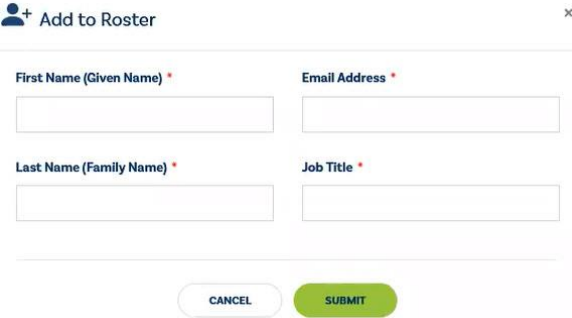
Manage Account Roster

Procedure




Follow the steps below to manage the account roster.


Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Roster	<p>Select Account Roster under Account Management.</p> <div style="text-align: center;">  <p>Account Management</p> <p>Account Information</p> <p>Billing Address</p> <p>Shipping Address</p> <p>Account Administrators</p> <p>Account Roster ←</p> </div>
3. Sort / Search Account Roster	<p>On the blue bar at the top of your account roster, you can sort by various categories such as "Member," "Status," and "Date Added" among others. Select a category to sort by. If you'd like the reverse order, hit the double arrows again.</p> <div style="text-align: center;">  </div> <p>Alternatively, you can search for an individual on the roster using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p>







Add To Roster - Individual

Procedure	Follow the steps below to add one individual at a time to the account roster.	
	Step	Description
	4. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
	5. Access Account Roster	Select Account Roster under Account Management. 
	6. Add to Roster (Part One)	Select the green "Add to Roster" button. 
	7. Add to Roster (Part Two)	Fill out their information. <p>Important! Before adding someone, please confirm with the individual whether or not they have an active MyIIA account. If they do, please confirm their primary email address associated with their IIA profile. This will ensure a duplicate profile is not created and their certifications and historical information is linked correctly.</p>  <p>Note: Individuals added to the roster are required to confirm their association with your organization before a membership slot or account administrative rights can be assigned. Please read Confirm Account Association.</p>

Add To Roster – Multiple

Procedure	Follow the steps below to add multiple individuals at a time to the account roster.	
	Step	Description
	8. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
	9. Access Account Roster	Select Account Roster under Account Management. 
	10. Upload Roster (Part One)	Select the dark blue “Upload Roster” button. 
	11. Upload Roster (Part Two)	You can download the template by selecting the blue button near the top left hand side of the page that reads “Download Template.”  Note: All fields are required except the GAN field for upload. To upload, select to browse your files and upload your completed template roster. You can also drag and drop the file here.  Important! Before adding someone, please confirm with the individual whether or not they have an active MyIIA account. If they do, please confirm their primary email address associated with their IIA profile. This will ensure a duplicate profile is not created and their certifications and historical information is linked correctly.
	12. Upload Roster (Part Three)	Once you have uploaded the file correctly, the “Submit” button on the bottom right hand side will change colors from silver to green. When this happens, you will be able to submit your roster template. 

	<p>13. Upload Roster (Part Four)</p>	<p>The system will then allow you to preview your uploaded information in the Admin Portal. If everything is correct, select the "Submit" button again.</p> <p>Note: Review the Processing Status column for all members.</p> <p>Duplicate Status: The individual is already listed on the roster. No further action needed.</p> <p>Error Status: The creation of this individual's account has not been completed.</p> <div style="text-align: center;">  </div> <p>Note: Please read Confirm Account Association. Individuals added to the roster are required to confirm their association to your organization before a membership slot can be assigned.</p>
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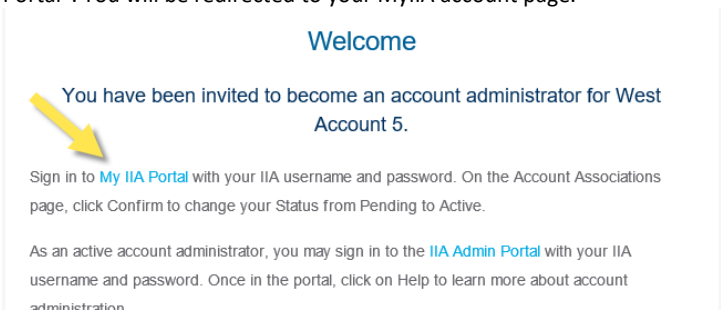
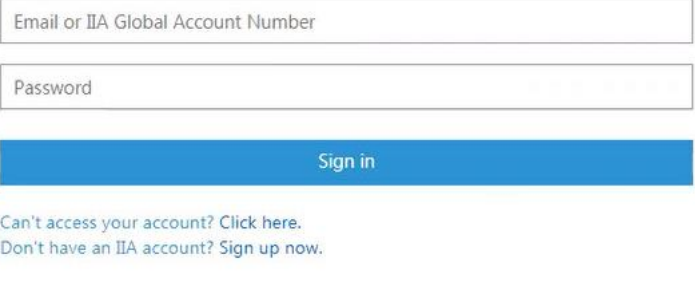
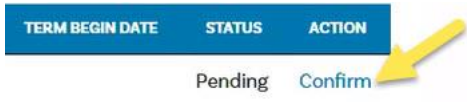
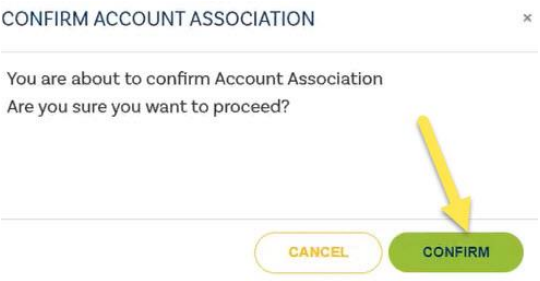
Download Account Roster									
Procedure	<p>Follow the steps below to download your roster. You can do this anytime!</p> <table border="1" data-bbox="397 993 1414 1749"> <thead> <tr> <th style="background-color: #0056b3; color: white;">Step</th> <th style="background-color: #0056b3; color: white;">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="397 993 669 1083">1. Access the Admin Portal</td> <td data-bbox="669 993 1414 1083">Go to https://adminportal.theiaa.org/ and log in using your IIA credentials.</td> </tr> <tr> <td data-bbox="397 1083 669 1591">2. Access Account Roster</td> <td data-bbox="669 1083 1414 1591"> <p>Select Account Roster under Account Management.</p> <div style="text-align: center;">  <p>Account Management</p> <p>Account Information</p> <p>Billing Address</p> <p>Shipping Address</p> <p>Account Administrators</p> <p>Account Roster ←</p> </div> </td> </tr> <tr> <td data-bbox="397 1591 669 1749">3. Download Account Roster</td> <td data-bbox="669 1591 1414 1749"> <p>To download a list of your current account roster in Excel format, select the light blue "Download List" button.</p> <div style="text-align: center;">  </div> </td> </tr> </tbody> </table>	Step	Description	1. Access the Admin Portal	Go to https://adminportal.theiaa.org/ and log in using your IIA credentials.	2. Access Account Roster	<p>Select Account Roster under Account Management.</p> <div style="text-align: center;">  <p>Account Management</p> <p>Account Information</p> <p>Billing Address</p> <p>Shipping Address</p> <p>Account Administrators</p> <p>Account Roster ←</p> </div>	3. Download Account Roster	<p>To download a list of your current account roster in Excel format, select the light blue "Download List" button.</p> <div style="text-align: center;">  </div>
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1. Access the Admin Portal	Go to https://adminportal.theiaa.org/ and log in using your IIA credentials.								
2. Access Account Roster	<p>Select Account Roster under Account Management.</p> <div style="text-align: center;">  <p>Account Management</p> <p>Account Information</p> <p>Billing Address</p> <p>Shipping Address</p> <p>Account Administrators</p> <p>Account Roster ←</p> </div>								
3. Download Account Roster	<p>To download a list of your current account roster in Excel format, select the light blue "Download List" button.</p> <div style="text-align: center;">  </div>								

Confirm Your Account Association for Admin & Roster Additions



Procedure

Whether you've added an individual as an administrator or to the roster, each person will need to follow the steps below to confirm their account association.






Note: This step is required before an administrator can gain access and before an individual can be assigned an available membership slot.

Step	Description
1. Confirm Email	<p>Once you receive a confirmation email, select where it says "My IIA Portal". You will be redirected to your MyIIA account page.</p> 
2. Sign In	<p>Once you have been redirected, sign in using your email address or GAN.</p> 
3. Confirm Association	<p>After you have reviewed that the information is correct, select where it says "Confirm" on the right.</p> 
4. Confirm That You Are Sure	<p>Select to "Confirm" on the bottom right hand corner to indicate that you are sure.</p> 

Edit the Account Information of Someone on Your Account Roster

Procedure	Follow the steps below to edit the information of someone on your account roster.							
	Step	Description						
	1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.						
	2. Access Account Roster	<p>Select "Account Roster" under Account Management.</p>  <p>The screenshot shows a green-bordered box containing a play button icon and the text "Account Management". Below this are several menu items: "Account Information", "Billing Address", "Shipping Address", "Account Administrators", and "Account Roster". A yellow arrow points to the "Account Roster" item.</p>						
	3. Sort/Search Account Roster Member	<p>You can sort the roster by name, job title, and email by selecting where it says "Name," "Job Title" and "Email."</p>  <p>Alternatively, you can search for a specific individual on the roster using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p>						
	4. Select Account Roster Member	<p>Once you have found whose profile you want to edit, select the blue "Edit" button towards the right hand side of the row.</p> <p style="text-align: center;">Edit / Delete</p>						
	5. Edit Account Information	<p>Correct or update account information.</p> <p>Note: GAN cannot be changed.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"> <p>First Name (Given Name) *</p> <input type="text" value="John"/> </td> <td style="width: 50%;"> <p>GAN</p> <input type="text" value="6001640"/> </td> </tr> <tr> <td> <p>Last Name (Family Name) *</p> <input type="text" value="Doe"/> </td> <td> <p>Email Address *</p> <input type="text" value="JohnDoe1234@iiauat.org"/> </td> </tr> <tr> <td colspan="2"> <p>Job Title *</p> <input type="text" value="Senior Audit Associate"/> </td> </tr> </table> <p>Then select the green "Submit" button below.</p> <p style="text-align: center;">SUBMIT</p>	<p>First Name (Given Name) *</p> <input type="text" value="John"/>	<p>GAN</p> <input type="text" value="6001640"/>	<p>Last Name (Family Name) *</p> <input type="text" value="Doe"/>	<p>Email Address *</p> <input type="text" value="JohnDoe1234@iiauat.org"/>	<p>Job Title *</p> <input type="text" value="Senior Audit Associate"/>	
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<p>Last Name (Family Name) *</p> <input type="text" value="Doe"/>	<p>Email Address *</p> <input type="text" value="JohnDoe1234@iiauat.org"/>							
<p>Job Title *</p> <input type="text" value="Senior Audit Associate"/>								

Correct Upload Roster Error

Procedure	
Follow the steps below to correct upload roster error.	
Step	Description
1. Download Error(s)	<p>If the file you upload has information missing or incorrectly formatted, you will be redirected to a different page. On that page, select the dark blue "Download Error(s)" button on the left hand side. You will now download an excel spreadsheet with your error(s) clearly marked.</p> 
2. Fix Error(s)	<p>Each error is marked with a yellow square with an exclamation point inside. Select each of these symbols and fix the error(s) as suggested.</p> 
3. Select "Cancel"	<p>Select the white "Cancel" button on the right hand side of the "Preview Upload" page to go back to the previous screen.</p> 
4. Upload Roster Again	<p>Attach the updated spreadsheet just as before.</p>  <p>Then select the green "submit" button on the bottom right hand side.</p> 

Congratulations! Now that you are familiar with

- managing your organization's account information,
- adding / removing administrators, and
- updating the account roster

You're ready to move on to the next guide; [Group Membership](#), to renew your group or add / remove members.