



User Guide

ASIC Regulatory Portal

How to invite someone to connect to an entity

Version 1.0



ASIC

Australian Securities & Investments Commission

How to invite someone to connect to an entity



You must have Senior administrator or Administrator access for an entity to have the rights to invite users to that entity.

1. **Log in** to the ASIC Regulatory Portal - <https://regulatoryportal.asic.gov.au/>

Log in

Email (Username)

Password

[Forgotten your password?](#)

2. Select the **entity** you wish to invite the user to connect to.

Who would you like to represent?

Select an entity from the list below or click '+ Connect to an entity' to add another entity.

[+ Connect to an entity](#)

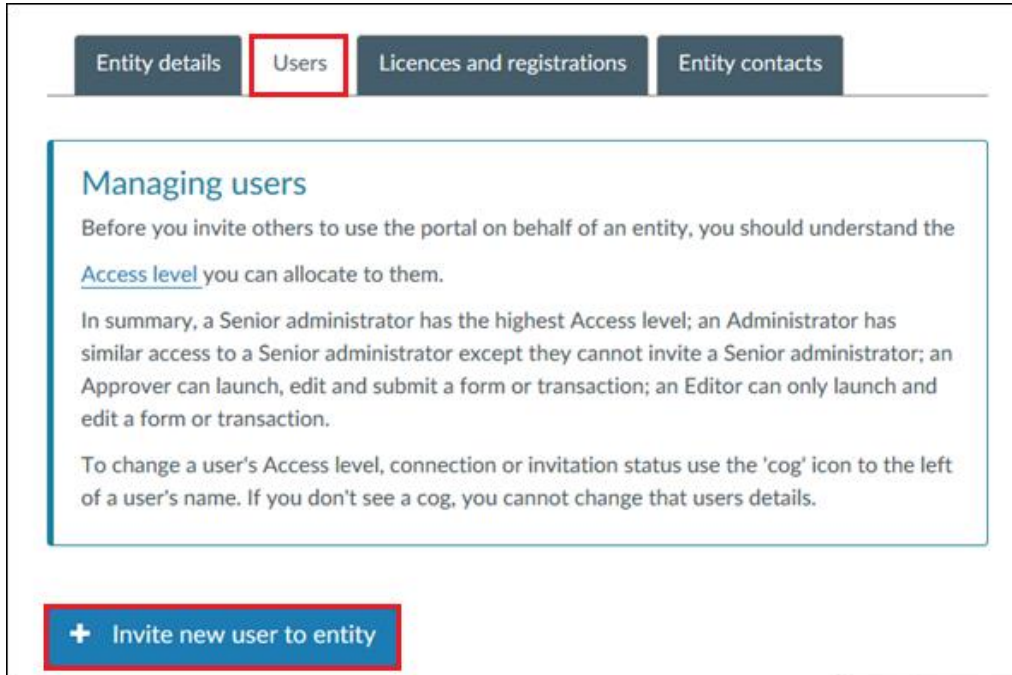
Current connections

Entity name	Entity type	ASIC identifier
Shane Ross (Myself)	Individual	
Brody Jenner	Individual	
TEST COMPANY PTY LTD	Australian registered company	

3. Click on **Administration** in the top navigation bar and select **Users** from the drop-down menu.

The screenshot shows the top navigation bar of the ASIC Regulatory Portal. The ASIC logo is on the left, followed by the entity name 'TEST COMPANY PTY LTD' and links for 'Switch entity' and 'Connect to another entity'. On the right, there are 'SR' and 'Help' icons. Below the navigation bar, a dropdown menu is open under 'Administration', showing options: 'Entity details', 'Users' (highlighted with a red box), 'Licences and registrations', and 'Entity contacts'.

4. Click on **Invite new user to entity**.



Entity details **Users** Licences and registrations Entity contacts

Managing users

Before you invite others to use the portal on behalf of an entity, you should understand the [Access level](#) you can allocate to them.

In summary, a Senior administrator has the highest Access level; an Administrator has similar access to a Senior administrator except they cannot invite a Senior administrator; an Approver can launch, edit and submit a form or transaction; an Editor can only launch and edit a form or transaction.

To change a user's Access level, connection or invitation status use the 'cog' icon to the left of a user's name. If you don't see a cog, you cannot change that users details.

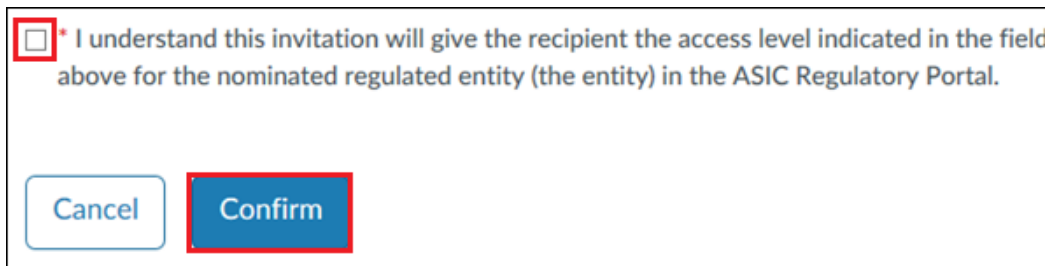
+ Invite new user to entity

5. Fill in the **invitee details**. Mandatory fields marked with marked a red asterisk *

You will also be asked to allocate an Access level. These are:

- Administrator – can launch, edit and submit a transaction and invite other users with an Approver or Editor Access access level to the entity.
- Approver – in general, can launch, edit and submit a form or transaction.
- Editor – in general, can launch and edit a form or transaction but they cannot submit it.

6. Read and make the declaration that you understand the Access level you are allocating, click the **check box** and select **Confirm**.



* I understand this invitation will give the recipient the access level indicated in the field above for the nominated regulated entity (the entity) in the ASIC Regulatory Portal.

Cancel **Confirm**



We will send an email to the invitee containing an invitation key that will enable them to connect to the entity.
Note: The invitee will need to register if they don't have an existing login.