

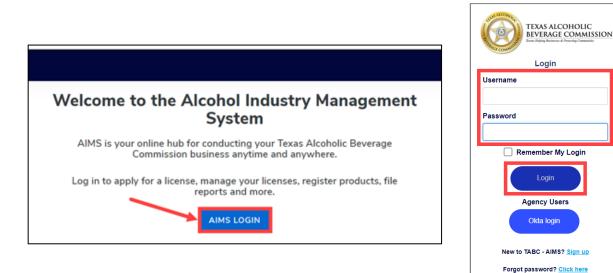
How To Manage User Access and Permissions User Access Management Menu

Follow the steps below to add or modify a user's access to a business entity. If you manage an AIMS account with multiple business entities and need to assign other users to complete work on your behalf, you must add or modify users for **each** business entity through the **User Access Management** tool.

Important note: Access can only be granted to a user for one business entity at a time. Repeat the steps for each business entity you'd like the user to have access to.

Before You Begin

- **Existing license holders**: A principal party (i.e., director, officer, etc.) or their designee must create an AIMS account and claim their business. Then they can grant access to additional users and select their level of access.
- New applicants that do not hold an existing license: A principal party (i.e., director, officer, etc.) or their designee must create an AIMS account and begin an application for a new license. The license application requires users to create a business entity, which will give them the option to add users.
- 1. Log in to AIMS:
 - Enter tabc.texas.gov/aims in Google Chrome or Microsoft Edge on any device.
 - Click Visit AIMS.
 - Click AIMS LOGIN once on the AIMS landing page.
 - Enter Username and Password. Click the Login button.

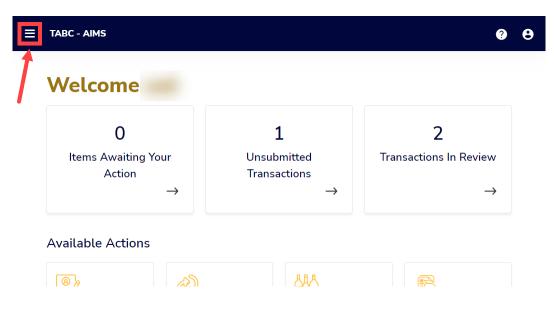




2. If you have several businesses, click the business entity you'd like to change.

TABC - AIMS		?	θ
Welcome Please select the business entity you would like to access.			
	Search	III	
Owner/Entity Name	ocuron	-	
BEVERAGE COMPANY INC. \rightarrow		*	
BEVERAGE COMPANY INC. →			
LLC \rightarrow			
LLC \rightarrow			
CORPORATION →			

3. The AIMS dashboard for the selected business entity will appear. Click the **menu button** (three white lines) at the top-left of the screen.





4. Click User Access Management.

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FEATU	IRE			HIS	TOR	Y	×
A	Dashboard Get an overview of your account	\$	Self-service Make changes to your existing licenses and permits	•	<u>_</u>	Transactions View your transaction history	
Ê	Needs Analysis Wizard Identify the type of license or permit that your business needs		User Access Management Add or modify users to your account				
Ð	View My Temporary Events Shows the list of temporary events	\$	Change Licensee Details Change your details				
ŵ	Product Registration Apply for a new product registration (brand label)		View My Labels View my labels				
Ä	Payment Cart		Excise Tax File excise tax reports				
	Compliance Reporting This feature will be available soon	?	Help Access Frequently Asked Questions (FAQs)				
	ate		\rightarrow \rightarrow			\rightarrow	

5. Review the users who currently have access to the business entity and its details.

Add More Users

1. Click the **Grant Access** button in the upper-right corner.

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User Access Management GRANT ACCESS VIEW HISTORY								
(i)	 NOTICE: The permittee account holder is legally responsible for the online actions of any person given access to the permittee account holder's AIMS online account. 							
To change permissions or l	5	ser, select an option from t	the dropdown m	enus in the "ACT	'ION" column.			
User Name 🔻 🔻	Туре 🔻	Email Id	Ŧ	Status	▼ Actions			
g2bpublic1	Additional User			Activated	-Selec	t- •		•
g2bpublic8	Prime			Activated	-Selec	t- •		



2. Enter the user's email address. Click the Save & Continue button.

≡	TABC - A	IMS				?	8
		Give access to a new user					
					X Required field		
		Master file number: 99					
		Enter email address *					
				_			
			BACK	SAVE & CONTINUE			

① Troubleshooting Tip

If the email address is not yet associated with an AIMS account: A message will be displayed if the user has been added successfully. An email will be sent to the email address you entered. The recipient of the email will need to create an AIMS account using the same email address you entered. Once the individual has created their account, you can skip to the Change User Permissions section on Page 9. The user will not be able to access the business entity until you assign them permissions using the steps in the Change Permissions section.

• An email has been sent to the email address provided below inviting them to create an AIMS account. Once the	e new user has created their accour	nt, you may assign that user permissions.

3. Check or uncheck permissions as necessary.

TABC - AIMS			?	0
Change User Permiss	ions			
Entity Name:	User Name:	Designation: 😮		
	g2bpublic1	Edit		
Permissions *				
You can assign a user a specific pe permissions listed below.	rmission by clicking on the check box. Users can	be assign multiple permissions. Prime User will have all		
Prime User : User will be able	o perform any action in the system along with ad	min actions.		
Read-Only : User will be able t	o see any license(s), applications and licensee dat	a but will not be able to perform any action.		
Licensing : User will be able to	apply and manage licenses.			
Excise Tax : User will be able to	perform excise tax related actions.			
Product Registration : User w	Il be able to perform product registration related	actions.		
Compliance Reporting : User	vill be able to perform Compliance Reportings act	ions.		
Enforcement : User will be able	e to respond to Enforcement Related RFI's.			
Legal : User will be able to resp	ond to Legal Related RFI's.			



Permission descriptions:

- **Prime User**: User will be able to perform any action in the system, including Administrator actions. If this is selected, the user already has full access and can't be given other permissions on this list. Prime users have access to all licenses and permits within and entity.
- **Read-Only**: User will be able to view any license(s), applications and licensee data but will not be able to perform any actions. If this is selected, the user can't be given other permissions on this list.
- Licensing: User will be able to apply for and manage licenses.
- **Excise Tax**: User will be able to perform excise tax actions.
- **Product Registration**: User will be able to perform product registration actions.
- Compliance Reporting: User will be able to perform compliance reporting actions.
- **Enforcement**: User will be able to respond to Enforcement requests for information (RFIs).
- Legal: User will be able to respond to Legal RFIs.
- Administrator: User can perform user access management actions.

Click Save & Continue button.

4. Choose whether you want the user to have access to all licenses and permits within a business entity or access to a limited list of licenses. By default, additional users have access to all licenses and permits under a business entity and the table on this screen will appear blank.

	0 O
Change Access to Licenses User Name: g2bpublic8	SELECT ACTION V
NOTICE: By default, the table below will be blank and users will have access to all licenses and permit Blank table = Access to all licenses and permits within this business entity. Table with a list of licenses = Access to only the licenses listed. To restrict this user's access to specific licenses, click SELECT ACTION > ADD TO LIST.	ts in an entity.
EXPORT TO EXCEL License N Y Type Y License S Y Address Y H 1 H 5 Items per page 0 Items per page 0	TradeN Y Expira Y No items to display

BACK TO USER ACCESS MANAGEMENT

Troubleshooting Tip

Users who are assigned **Prime** access on the previous screen will not see the Change Access to Licenses screen. **Prime** users have access to all licenses within a business entity.



If you choose to restrict a user's access to specific licenses and permits within an entity, you can add license(s) to the access list, click the **Select Action** dropdown arrow.

Select Add to List.

E TABC - AIMS						0 O	
Change Access to L User Name: g2bpublic1					SELECT AC SELECT A ADD TC	CTION	
NOTICE: By default, the table below will be blank and users will have access to all licenses and per REMOVE FROM LIST Blank table = Access to all licenses and permits within this business entity. Table with a list of licenses = Access to only the licenses listed. To restrict this user's access to specific licenses, click SELECT ACTION > ADD TO LIST.							
X EXPORT TO EXCEL							
License Y Type	т	License 🝸	Address	Ŧ	TradeN 🝸	Expira 🝸	
Mixed	d Beverage Permit (MB)	Active				08/17/2023	
Mixed	d Beverage Permit (MB)	Active				06/08/2023	
Mixed	d Beverage Permit (MB)	Active				04/04/2023	
i ≪ 1	▼ items per page 1					1 - 3 of 3 items	

BACK TO USER ACCESS MANAGEMENT

5. A list of all available license(s) that you can assign will appear. From the available list or by using the Filter, check the licenses you would like to assign to the selected user.

						9 9
X Filter Saved Search	Cha	nge Access To	License(s)			
License Type	Add to		click on the checkbox(es) i ting the license(s) below.	n the below table. To com	plete the action, pl	ease click on the
Select 🗸			here to group by that column			
County Select		License Type 🔻	License Number 🝸	License Status 🔻	Address T	TradeName Y
City		Mixed Beverage Permit (MB)		Active		
more						
CLEAR FILTER APPLY FILTER		Mixed Beverage Permit (MB)		Active		
SAVE SEARCH CRITERIA		Mixed Beverage Permit (MB)		Active		



6. When complete, click the **Add to List** button.

				0 B
more		Wine and Malt Beverage Retailer's Off- Premise Permit (BQ)	Active	
CLEAR FILTER APPLY FILTER		Wine and Malt Beverage Retailer's Off- Premise Permit (BQ)	Active	
		Wine and Malt Beverage Retailer's Off- Premise Permit (BQ)	Active	
		Wine and Malt Beverage Retailer's Off- Premise Permit (BQ)	Active	
	H 4	1 2 3	► ► 5 Tritems per page	1 - 5 of 302 items
			BACK ADD TO LIST	

7. To remove license(s) access from the list, click the **Select Action** dropdown arrow.

Select Remove from List.

=	TABC	- AIMS								?	0
	C hange . Jser Name		s to Licenses blic1						SELECT AC SELECT A	ACTION	~
	Blank ^(†) Table	table = with a l	efault, the table below w Access to all licenses ar list of licenses = Access : user's access to specific	nd perm to only	its within t the license	his bus es liste	siness entity. d.	nd per	REMOVE F		
	EXPORT		Туре	Ŧ	License	Ţ	Address	Ŧ	TradeN Y	Expira `	T
			Mixed Beverage Permit (MB)		Active					08/17/202	3
			Mixed Beverage Permit (MB)		Active					06/08/202	3
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BACK TO USER ACCESS MANAGEMENT



8. Check the licenses to remove.

Click the **Remove from List** button.

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Chan	ge Access To License(s)					
	t the license(s), please click on the checkbox(s) below.	es) in the below table. To c	omplete the action, please	e click on the "Remove	from List" button a	after selecting the
EXP	ORT TO EXCEL					
Drag a c	olumn header and drop it here to group by that col	umn				
	License Type	License Number Y	License Status 🔻	Address	Ŧ	TradeName T
	Mixed Beverage Permit (MB)		Active			
	Mixed Beverage Permit (MB)		Active			
н 4	1 → → 5 ▼ items per page					1 - 2 of 2 items
		ВАСК	REMOVE FR	OM LIST		

9. Check to make sure the list of licenses the user will be able to access looks correct and click **BACK TO USER ACCESS MANAGEMENT** at the bottom of the screen.

The user now has access to the business entity with the permissions you selected. The user will be sent an email notifying them that their user permissions have been updated for the associated business entity.



Change User Permissions

1. On the **User Access Management** screen, you can also change the type of permissions for each user account.

Under the Actions column, click the dropdown arrow next to the User Name.

Then select Change Permission.

=	TABC - AIMS									?)	0
	User Acce	ess Mar	nag	ement		GRAN	۲ ACCEs	SS	VIEW H	ISTORY		
	 NOTICE: The permittee account holder is legally responsible for the online actions of any person given access to the permittee account holder's AIMS online account. 											
To change permissions or licenses assigned to a user, select an option from the dropdown menus in the "ACTION" column. DOWNLOAD USER PERMISSION												
	User Name 🔻	Туре	Ŧ	Email Id	Ŧ	Status	T	Actions				
	g2bpublic1	Additional Us	er			Activated		Select-		•	*	
	g2bpublic8	Prime				Activated		Sele	<mark>ct</mark> ge Permissio	n		
	UATAug	Prime				Activated			ge Licenses			
	Rteruvois	Additional Us	er			Disabled			le User e User			
	Gina_TABCTest	Prime				Activated		Select-		Ŧ	-	
	H A F H	5 • items	per page							1 - 5 of 6 iten	ns	



- 2. Check or uncheck permissions as necessary. Prime Users have full account access.
 - **Prime User**: User will be able to perform any action in the system, including Administrator actions. If this is selected, the user already has full access and can't be given other permissions on this list.
 - Read-Only: User will be able to view any license(s), applications and licensee data but will not be able to perform any actions. If this is selected, the user can't be given other permissions on this list.
 - Licensing: User will be able to apply for and manage licenses.
 - **Excise Tax**: User will be able to perform excise tax actions.
 - **Product Registration**: User will be able to perform product registration actions.
 - **Compliance Reporting**: User will be able to perform compliance reporting actions.
 - **Enforcement**: User will be able to respond to Enforcement requests for information (RFIs).
 - Legal: User will be able to respond to Legal RFIs.
 - Administrator: User can perform user access management actions.

Click Save & Continue button.

≡	ТАВС	- AIMS						?) (8
		Change User Perm	issions							
		Entity Name:		User Name:		Designation: 🕜				
				g2bpublic1		Edit				
		Permissions *								
		You can assign a user a specific permission by clicking on the check box. Users can be assign multiple permissions. Prime User will have all permissions listed below.								
		Prime User : User will be able to perform any action in the system along with admin actions.								
		Read-Only : User will be a	ble to see any licen	se(s), applications and	l licensee data but will not b	e able to perform any actic	in.			
		✓ Licensing : User will be able	le to apply and man	age licenses.						
		🗆 Excise Tax : User will be al	ble to perform excis	e tax related actions.						
		✓ Product Registration : Use	er will be able to pe	rform product registra	ation related actions.					
		Compliance Reporting : U	Jser will be able to p	perform Compliance R	eportings actions.					
		Enforcement : User will be	e able to respond to	Enforcement Related	RFI's.					
		Legal : User will be able to	respond to Legal R	elated RFI's.						
		Administrator : User will b	be able to perform u	iser access manageme	ent related actions.		•			
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Change Licenses

1. Change Licenses allows you to add or remove licenses from individual permissions.

Under the Actions column, click the **dropdown arrow** next to the User Name.

Select Change Licenses.

≡	TABC - AIMS				Ø (
	User Acces	ss Manag	ement	GRANT ACCE	ESS VIEW HISTORY					
	 NOTICE: The permittee account holder is legally responsible for the online actions of any person given access to the permittee account holder's AIMS online account. 									
	To change permissions or DOWNLOAD USER PERM		iser, select an option from the dropdown	menus in the "ACTION"	column.					
	User Name 🛛 🝸	Туре 🔻	Email Id 🛛 🔻	Status T	Actions					
	g2bpublic1	Additional User	g2btestv1+g2bpublic1@gmail.com	Activated	-Select-					
	g2bpublic8	Prime	g2btestv1+g2bpublic8@gmail.com	Activated	Select Change Permission					
	UATAug	Prime	uatt06929@gmail.com	Activated	Change Licenses					
	Rteruvois	Additional User	rteruvoi@gmail.com	Disabled	Disable User Delete User					
	Gina_TABCTest	Prime	licemailrequests@tabc.texas.gov	Activated	-Select-					
	H 4 ► H 5	5 🔹 items per page			1 - 5 of 6 items					



2. By default, additional users have access to all licenses and permits under a business entity and the table will appear blank.

≡ TABC - AIMS	0 O						
Change Access to Licenses User Name: g2bpublic8	SELECT ACTION V						
 NOTICE: By default, the table below will be blank and users will have access to all licenses and permits in an entity. Blank table = Access to all licenses and permits within this business entity. Table with a list of licenses = Access to only the licenses listed. To restrict this user's access to specific licenses, click SELECT ACTION > ADD TO LIST. 							
EXPORT TO EXCEL License N Y Type Y License S Y Address Y IM 1 M 5 Y items per page 0 0	TradeN Y Expira Y No items to display						

BACK TO USER ACCESS MANAGEMENT

If a user is restricted to only certain licenses and permits, the licenses and permits they **can access** will appear in the table.

To add license(s) to the access list, click the **Select Action** dropdown arrow.

Select Add to List.

E TABC - AIMS	i					0 O			
Change Access User Name: g2bpu	SELECT ACTION ~ SELECT ACTION ADD TO LIST								
Blank table = ^① Table with a	NOTICE: By default, the table below will be blank and users will have access to all licenses and per REMOVE FROM LIST Blank table = Access to all licenses and permits within this business entity.								
EXPORT TO EXCEL	Туре	Z License ▼	Address	Ŧ	TradeN T	Expira T			
	Mixed Beverage Permit (MB)	Active				08/17/2023			
	Mixed Beverage Permit (MB)	Active				06/08/2023			
	Mixed Beverage Permit (MB)	Active				04/04/2023			
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BACK TO USER ACCESS MANAGEMENT



3. A list of all available license(s) that you can assign will appear. From the available list or by using the Filter, check the licenses you would like to assign to the selected user.

E TABC - AIMS						?	8			
X Filter Saved Search	Cha	nge Access To L	icense(s)							
		lect the license(s), please click on the checkbox(es) in the below table. To complete the action, please cli to List" button after selecting the license(s) below.								
License Type	A EXPORT TO EXCEL									
County	irag a co	rag a column header and drop it here to group by that column								
Select		License Type 🝸	License Number Y	License Status Y	Address Y	TradeNa	ame 🝸			
City		Mixed Beverage Permit (MB)		Active						
more										
CLEAR FILTER APPLY FILTER		Mixed Beverage Permit (MB)		Active						
SAVE SEARCH CRITERIA										
		Mixed Beverage Permit (MB)		Active						

4. When complete, click the **Add to List** button.

E TABC - AIMS			0 0
CLEAR FILTER		Wine and Malt Beverage Retailer's Off- Active Premise Permit (BQ)	-
SAVE SEARCH CRITERIA		Wine and Malt Beverage Retailer's Off- Active Premise Permit (BQ)	
		Wine and Malt Beverage Retailer's Off- Premise Permit (BQ)	
		Wine and Malt Beverage Retailer's Off- Premise Permit (EQ)	
	н ч	1 2 3 ► ► 5 ▼ items per page	1 - 5 of 302 items
		BACK ADD TO LIST	



5. To remove license(s) access from the list, click the **Select Action** dropdown arrow.

Select Remove from List.

TABC - AIMS						0 e			
Change Access to Licenses User Name: g2bpublic1						CTION ~			
Blank table = Access Table with a list of li	ADD TO LIST NOTICE: By default, the table below will be blank and users will have access to all licenses and per Blank table = Access to all licenses and permits within this business entity. Table with a list of licenses = Access to only the licenses listed. To restrict this user's access to specific licenses, click SELECT ACTION > ADD TO LIST.								
EXPORT TO EXCEL									
License Y Type	Ŧ	License 🝸	Address	Ŧ	TradeN 🔻	Expira 🝸			
Mixed Be	everage Permit (MB)	Active				08/17/2023			
Mixed Be	everage Permit (MB)	Active				06/08/2023			
i	items per page 1					1 - 2 of 2 items			

BACK TO USER ACCESS MANAGEMENT

6. Check the licenses to remove.

Click the Remove from List button.

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Chang	ge Access To License(s)								
	To select the license(s), please click on the checkbox(es) in the below table. To complete the action, please click on the "Remove from List" button after selecting the license(s) below.								
EXPO	DRT TO EXCEL								
Drag a co	olumn header and drop it here to group by that	column							
	License Type	License Number Y	License Status 🔻	Address	Ŧ	TradeName 🔻			
	Mixed Beverage Permit (MB)		Active						
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		ВАСК	REMOVE FR	OM LIST					



① Troubleshooting Tip

Why am I having trouble confirming additional users for my account?

If you're a business entity adding additional users:

Make sure you're entering the exact email address that the additional user has used or will use to create their own AIMS account.

If you're being added as an additional user:

- Create your AIMS account by using the same email address as the one used to add you as an additional user.
- Before accepting your Additional User status through the Confirm Access Request email, make sure you've created your AIMS account first and are currently logged in to *that account* using the same email address as the one used to add you as an additional user.

Once you have confirmed these two things, you can click on the link in the email to accept access.