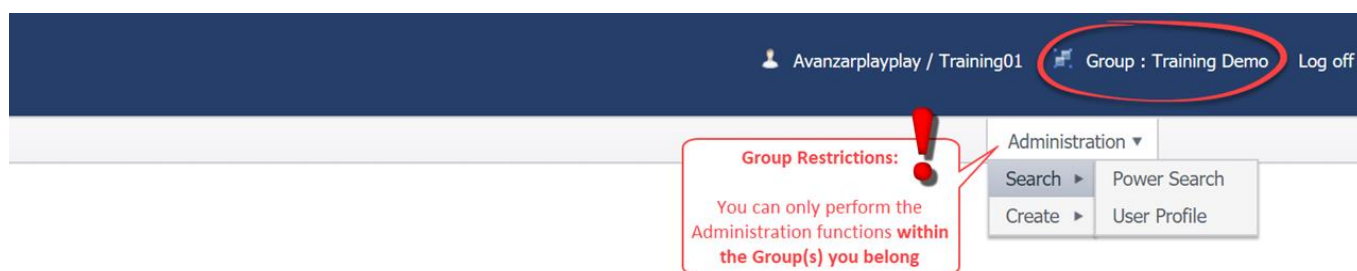


# 1 Search



There are two (2) types of searches namely:

1. **Power Search:** best used to find existing Users or Groups
2. **User Profile search:** provides more administrative controls for User profiles

The search criteria in both instances is the same in that, you can **search by Name, Surname, Username, ID Number or Email address**.

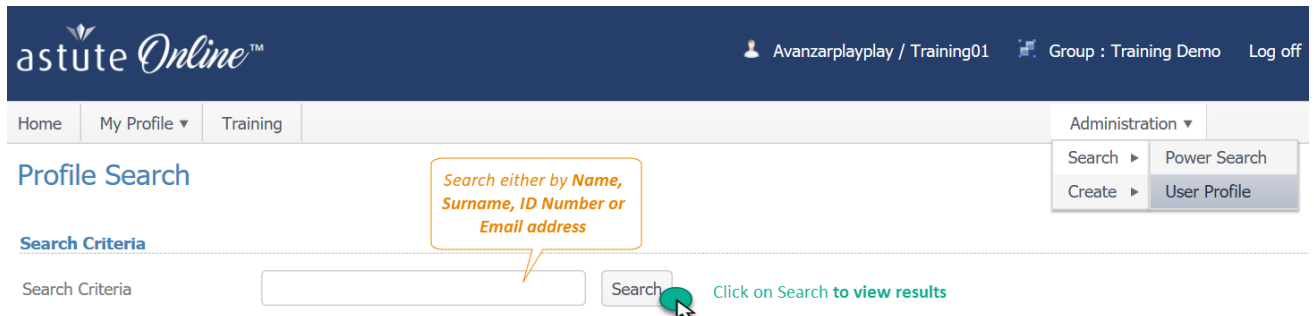
## **\*\*Search Tips:**

- **to view all the Users in a Company or Group, leave the search criteria blank and click the Search button.**  
The list shown can be exported to an Excel spreadsheet
- type at least the first three (3) characters in the search criteria field if searching by Name, Surname and Username before clicking the search button. This will retrieve records containing all three characters.
- ID number and Email address should be typed in full, in the search criteria field
- The **ID Number is the most precise search criteria** as it is unique to an individual and the system does not allow duplicates



## 1.2 User Profile Search

- From the **Administration** tab, click on **Search > User Profile**.



astute Online™

Avanzarplayplay / Training01 Group : Training Demo Log off

Home My Profile Training Administration

Search Power Search  
Create User Profile

Profile Search

Search Criteria

Search Criteria

Search

Click on Search to view results

- In the **Search Criteria** field, **type** in either the Name, Surname, Username, Full ID Number or Email address of the User you are searching for and click on the **Search** button to view results.

**\*\*To view all the Users in your Group**, leave the search criteria blank and click the search button. The list can be exported to Excel.

Search Results

Export to Excel Create Profile

Username	Id Number	First Name	Surname	Status Reason	Password Last Reset Date	Password Last Reset By	
Training05	789654	Joe	Soap				Maintain

10 items per page 1 - 1 of 1 items

Update the Users personal details and change their Administration Level

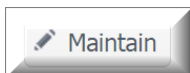
Can only link the User to the Group(s) the Administrator is linked to

Give the User permission to perform certain functions on the system

Provide a reason for permanently deleting or temporarily deactivating a User from the system

For recently created User accounts; where a User hasn't confirmed/verified the account

Assign Group Assign Security X Delete Deactivate Send Confirmation Email



To log into Astute Online, both the User's cellphone number and email address need to be correct. Majority of the time, the reason for not receiving a PIN is due to not having a cellphone number under the User's profile or the number is incorrect. Similarly; Users will not receive an email to confirm their account or change their password if the email address is incorrect.

Participants Administrators can solve this problem by referring to the Users profile and updating the contact information.

Maintain User

Identity Information

Identity Type Other Identity Number 2343431

Profile Information

Company Avanzarplayplay Administration Level Standard

Username JSoap Email Address training@astutefse.com

Title Mr Initials JS

First Name Joe Surname Soap

Cell Number 072 911 1011 Work Number +27 11 214 0900

Fax Number +27 10 123 4567 Last Change: 14 Mar 2018 03:47 PM

Profile Attributes

Cannot be edited

Refer to the Email address and Cell Number fields when User doesn't receive a PIN and/or email to log into the system

Cancel Save

Therefore, click on the **Maintain** tab to solve login queries relating to not receiving a PIN and/or Email.



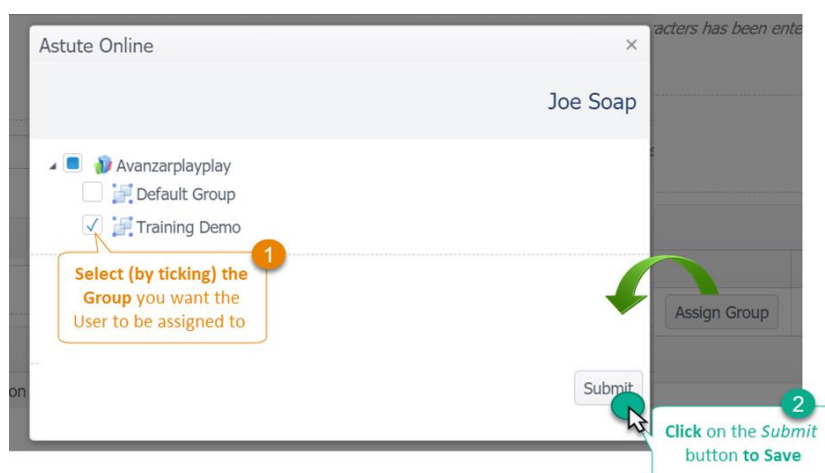
## Assign Group

The creation of groups within a company, **assists in being able to manage Users in their various groups** i.e. *branches, divisions, regions, etc.* Additional Administrators can be allocated to manage and maintain each group.

On Astute Online, Users need to be assigned/linked to a group, except Assistants who will not have an *Assign Group* button next to their profile. Click on the **Assign Group** button from the row of controls

- In the pop-up box, **select** the Group you want the User to be linked to then click the **Save** button.

*\*\*Ideally, Standard Users should only be linked to one Group.*

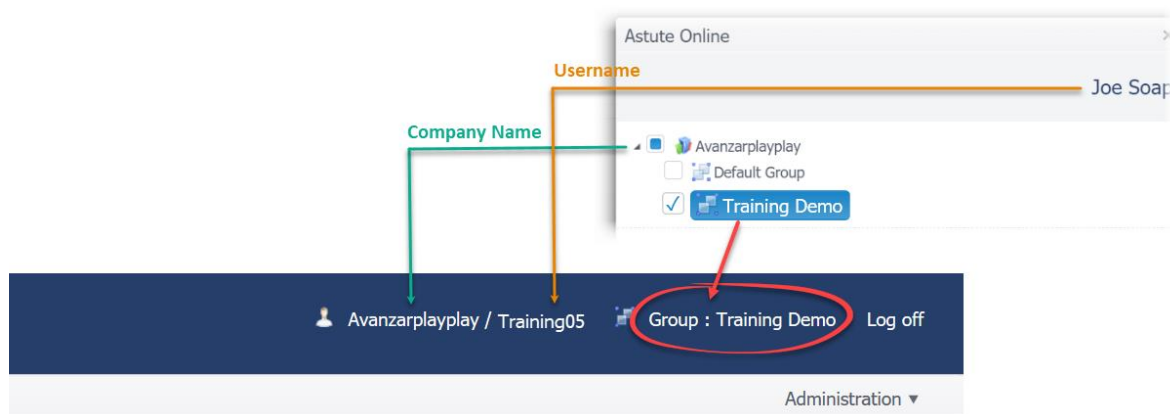


The User has now been linked to the Group and the profile updated.

## What will the User See?

When the User logs in, the Group s/he is linked to will appear in the upper-right hand corner of the page (blue ribbon), as shown below.

This will **not affect how the User transacts**, but simply stipulates in which Group s/he belongs.



## Assign Security

Not all Users have the same access on a system and Astute Online, therefore each User needs to be assigned permissions that match the role that was selected when their profile was created. It is possible to enable and disable permissions once the profile has been created.

It is important to note that **permissions / security claims are assigned at User level**, not Group level.

Administrators have control of what **permissions to give to Users on a Product and on Astute Online**. Standard Users can only use the functions that were assigned to them.

- **Under the CCP tab**, tick the functions you want the user to perform **on the Product**.

**\*\*LK = Linked Investments**

**LR = Life and Risk**

**UT = Unit Trust**

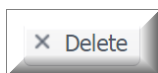
The screenshot shows the 'Astute Online' window with the 'Assign Security' button on the right. The 'Apply Security Template' dropdown is set to 'Standard User'. The 'CCP' tab is selected, and a lightbulb icon with the text 'Complete both tabs!' is visible. A callout box with a green circle '1' points to the 'CCP' tab and says 'Select the functions you want the User to perform on the product'. The 'CCP' section contains several checkboxes: 'Ccp Can Download XML', 'Perform CCP Transactions (Global)', 'Perform CCP LK Transaction', 'Perform CCP UT Transaction', and 'Perform CCP LR Transaction'. The 'Perform CCP LR Transaction' checkbox is checked. A 'Select All' checkbox is on the right. A 'Submit' button is at the bottom right.

- **Under the User Management**, tick the functions you want the User to perform **on Astute Online**.

The screenshot shows the 'Astute Online' window with the 'Assign Security' button on the right. The 'Apply Security Template' dropdown is set to 'Standard User'. The 'User Management' tab is selected. A callout box with an orange circle '2' points to the 'User Management' tab and says 'Select the functions you want the User to perform on Astute Online'. The 'User Maintenance' section contains checkboxes for 'Create User Profile' and 'View User Profile'. The 'View User Profile' checkbox is checked. A 'Select All' checkbox is on the right. A 'Submit' button is at the bottom right. A callout box with a green circle '3' points to the 'Submit' button and says 'Ensure you've captured both tabs on this screen before submitting'.

- Once both screen have been completed, **click** on the **Submit** button to save.



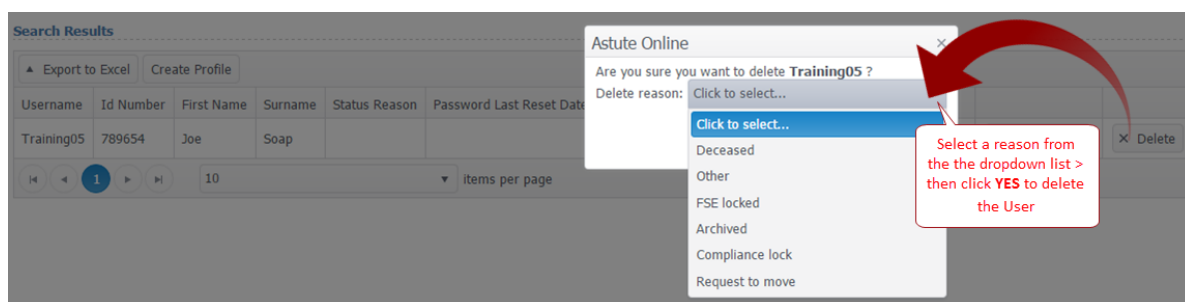


One of the key tasks of a Participant Administrator is to **terminate Users from the Company or Group when they longer work there**. When a User leaves your employ without terminating his/her system access, the User can still access Astute Online and the Company will be held responsible for those transactions that were performed after the resignation. It is therefore imperative that Administrators take full control of terminating relevant Users' access to Astute Online. This will also help to **provide a clean and uncluttered database** environment.

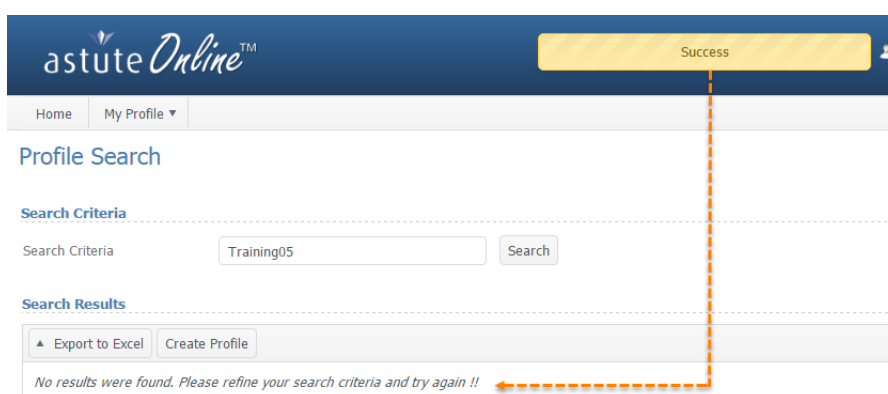
The delete button **permanently removes the User Profile** from the system's front-end and relevant database. Any transactions performed under the User's account will still be visible in the reports - if viewed within a 45 day period.

### To delete a User, use either Power Search or User Profile search

- In the pop-up message box, select the appropriate reason for deletion.
- Then click on the 'Yes' button to confirm the deletion.



Once the *Success* message appears, the action cannot be undone. The User has been successfully deleted.



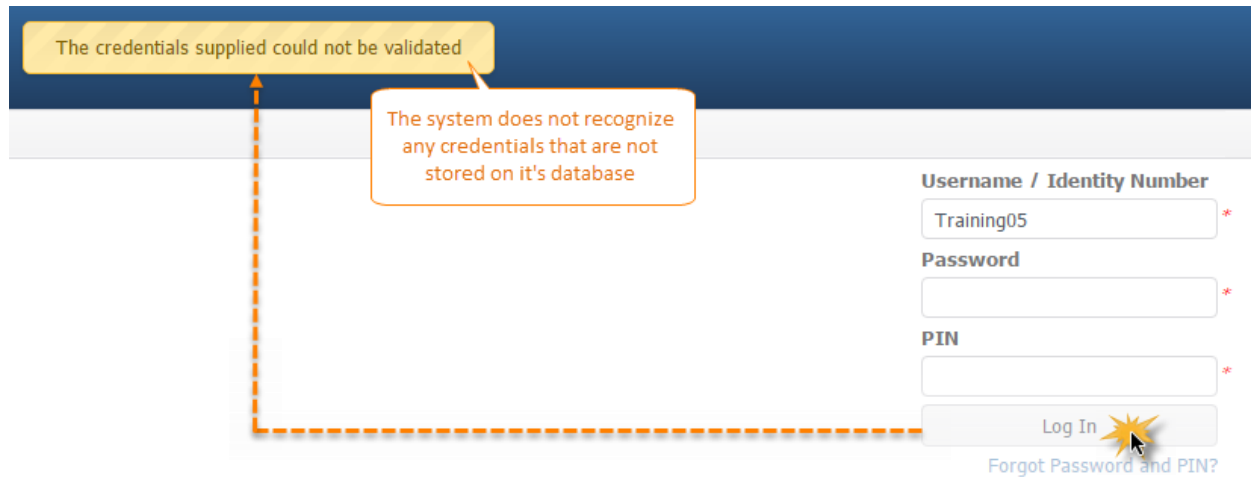
### What Does this Mean?

When the User profile is deleted, the following types of data will be deleted:

- all details under the Maintain tab *i.e. the Username and all personal details*
- all security claims assigned to him/her
- all User to Group and/or Company database connections



**All transactions performed by the User in the last 45 days will not be deleted.** In other words, the only place where the Users details will appear, is under reports, if they are downloaded within 45 days of deleting the User.



The screenshot shows a login interface with a dark blue header. A yellow error box at the top left contains the text: "The credentials supplied could not be validated". Below this, an orange callout box points to the error message with the text: "The system does not recognize any credentials that are not stored on it's database". The login form on the right includes fields for "Username / Identity Number" (containing "Training05"), "Password", and "PIN", each with a red asterisk indicating a required field. Below the fields is a "Log In" button with a yellow starburst icon. A link "Forgot Password and PIN?" is located below the "Log In" button. A dashed orange line connects the "Log In" button to the error message.

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*In a case of a User moving to another company; it is imperative that you delete the User upon resignation for two reasons:*

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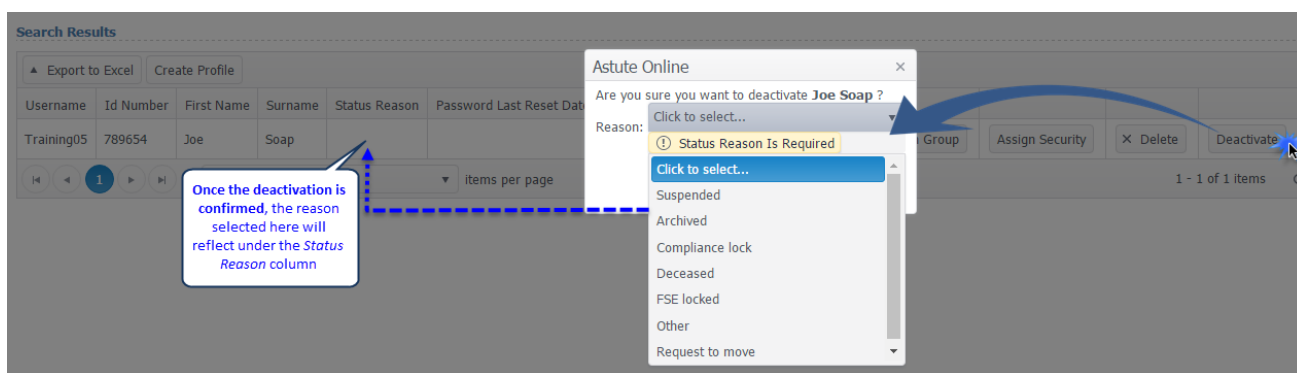
- **the User will still be able to access and transact under your Company.** Your Company will be held responsible for those transactions that were performed after the resignation
- **the new Administrator will not be able to add the User onto their database.** Once the User is deleted from your database, you have no way of knowing if they were added by another Administrator in another Company.

Deactivate

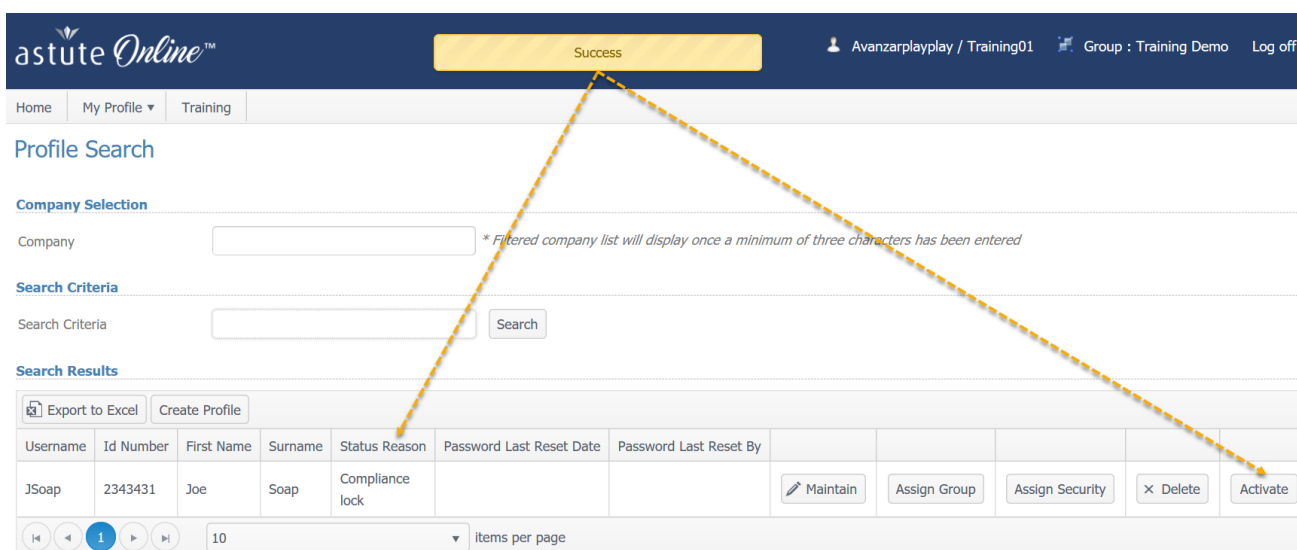
Deactivating a User profile prevents the User (or anyone else trying to use the Users account) from logging in and transacting on Astute Online. The profile is not cancelled, but **temporarily locked, due to various reasons** i.e. *abuse of the system, non-compliance, lack of payment, etc.*

### To Deactivate a User:

- Conduct either a Power Search or a User Profile search and complete the search criteria. (*This example uses the User Profile search*).
- Under the Search Results screen, click the **Deactivate** button from the row of controls to view the pop-up box below.
- Select a reason for deactivation and click on the '**Yes**' button to confirm the deactivation.



A message will appear once the deactivation is successful and the results screen is updated with the following: the reason for deactivation is clearly visible under the *Status Reason* column and the Deactivate button changes to Activate.



## How it affects the User

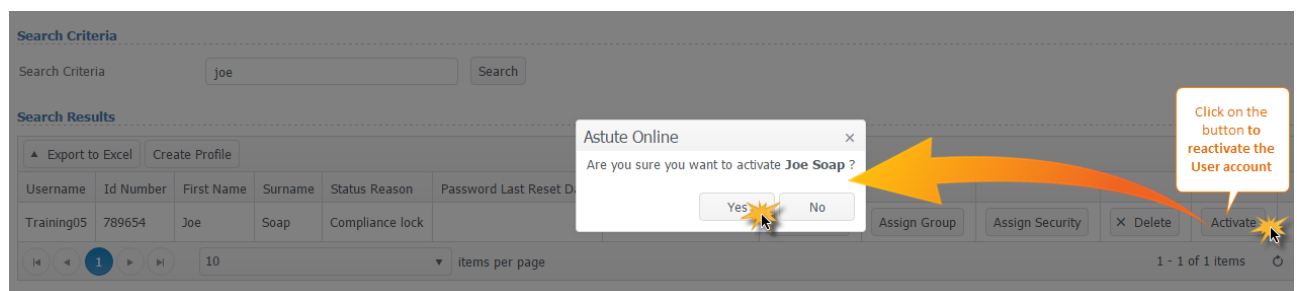
When a User account is deactivated or disabled, the User (or anyone using the User's credentials) will not be permitted to log in or reset their password.



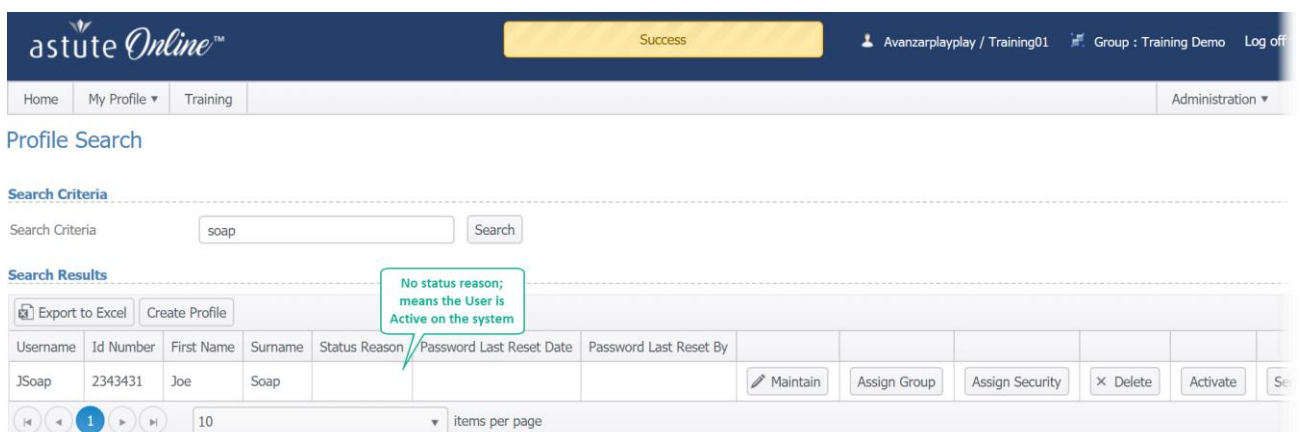
## To Reactivate the User's Account

Before activating a disabled account, consider the reason for deactivation. Only once the requirements were met should you reactivate the account by following the steps below:

- Conduct a *Power Search* or *User Profile Search* > complete the search criteria field > click the *Search* button to view results and control button
- Click on the **Activate** button from the row of controls to prompt the pop-up below



- In the pop-up message box, click on the 'Yes' button to confirm activation.
- The 'Success' message shown means the User's profile has been reactivated and access to the system has been restored. The User can now proceed to log on normally.





Send Confirmation Email

This button will **only be applicable to new profiles** that are created. A User profile with this button means the **User has not yet verified the account**. The User will receive a *pending verification* error when trying to log on.

Your account is currently pending verification

Username / Identity Number  
Training04

Password

When the account was created, the User received an email with a link to confirm the account and a SMS with a temporary PIN. The **link in the email is only valid for 8 hours** from the time the account was created.

If the link has expired, (or the email/SMS was deleted/not received), the Administrator can **resend the email and another OTP PIN** will automatically be sent as well.

Confirmation Email Sent

Avanzarplayplay / Training01 Group : Training Demo Log off

Administration

Another SMS with a OTP will also be sent to the User

Password Last Reset By						
	Maintain	Assign Group	Assign Security	× Delete	Activate	Send Confirmation Email

Resending email for a User to confirm his/her account

1 - 1 of 1 items

Therefore, **click on this button to resend a confirmation email and OTP PIN** to the User.

**\*\*Note:** Each User can also perform this function (resending Email and PIN) on their own by clicking on the **Forgot Password and PIN** hyperlink on Astute Online homepage.

