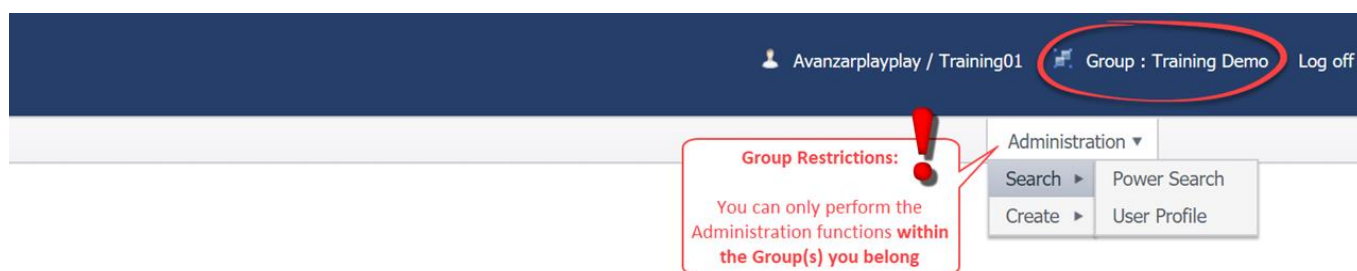# 1 Search

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**.
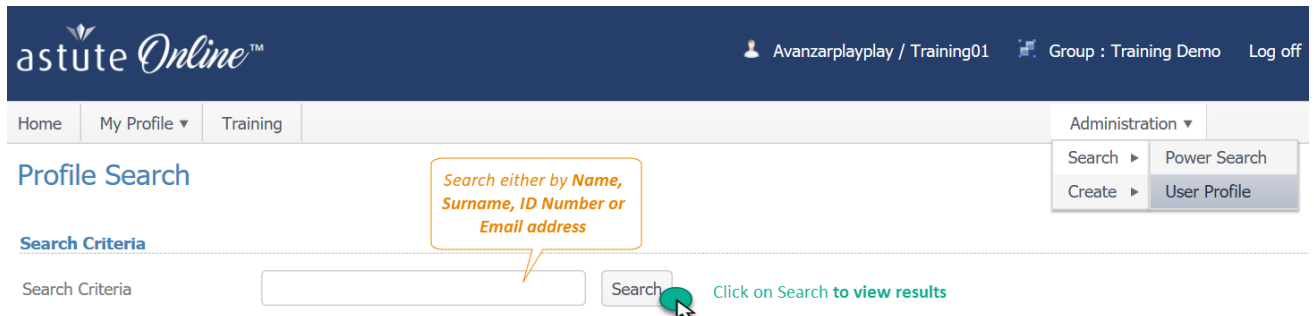
**Search Tips:

- **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.**

- 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.

 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.

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, expect 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.

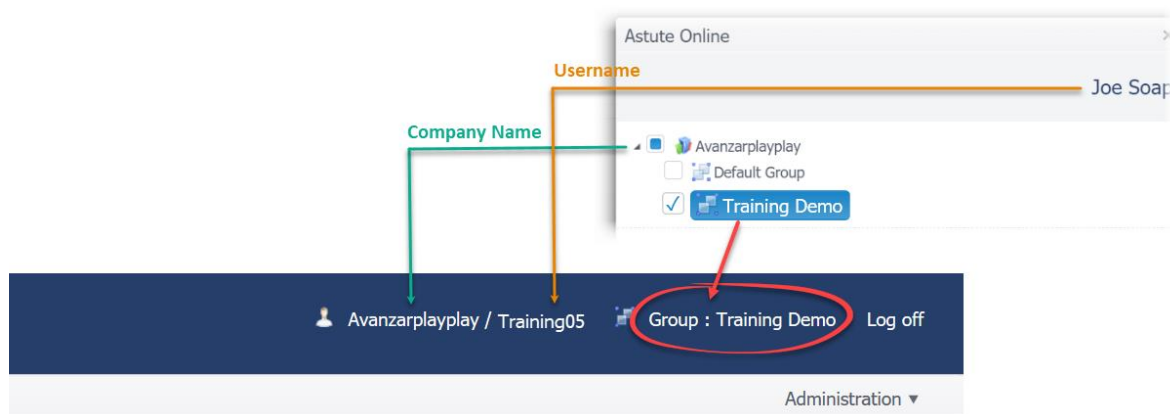 **Ideally, Standard Users should only be linked to one Group.*
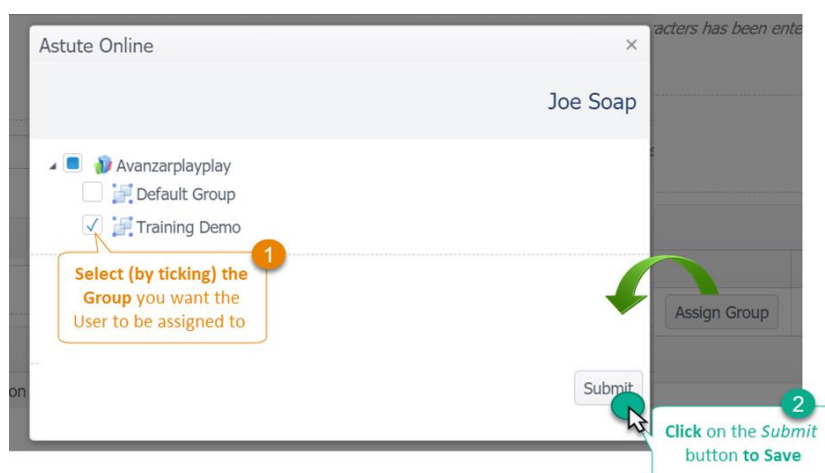
The User has now been linked to the Group and the profile updated.

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 per**missions to give to Users on a Product and on Astute Online**. Standard Users can only use the functions that where assigned to them.

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

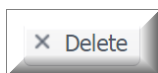   ****LK = Linked Investments   LR = Life and Risk   UT = Unit Trust**

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

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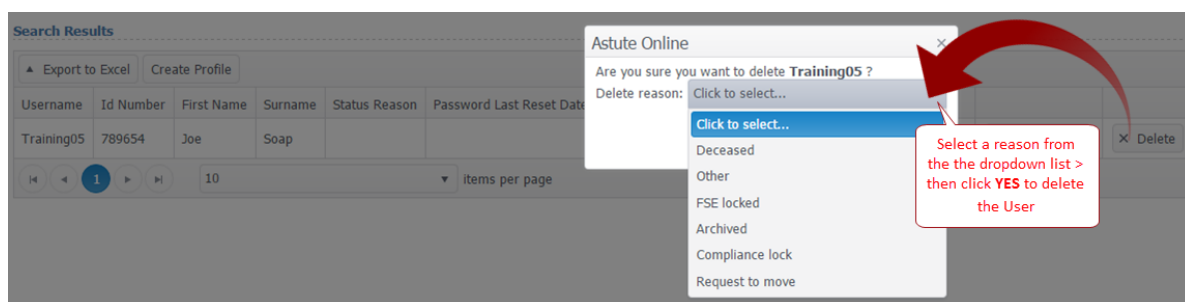
× Delete

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.

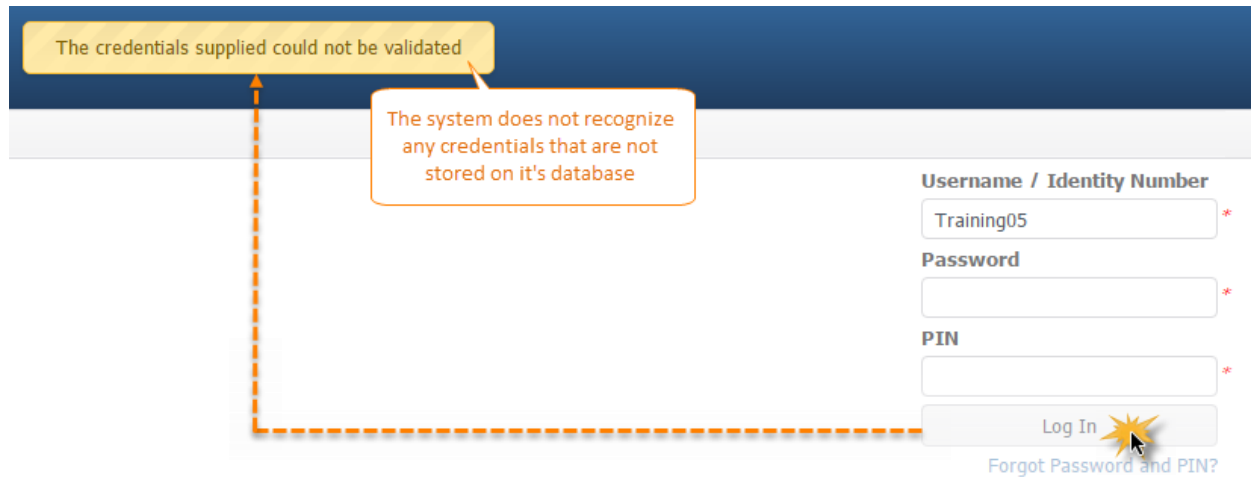Once the *Success* message appears, the action cannot be undone. The User has been successfully deleted.
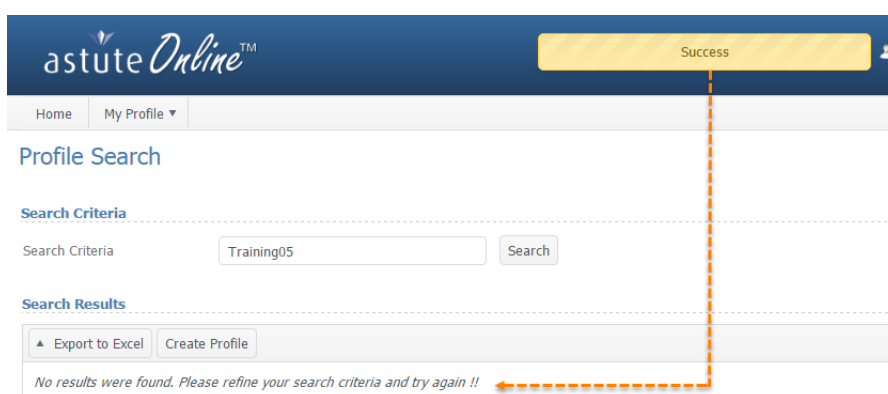
What Does this Mean?

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.

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

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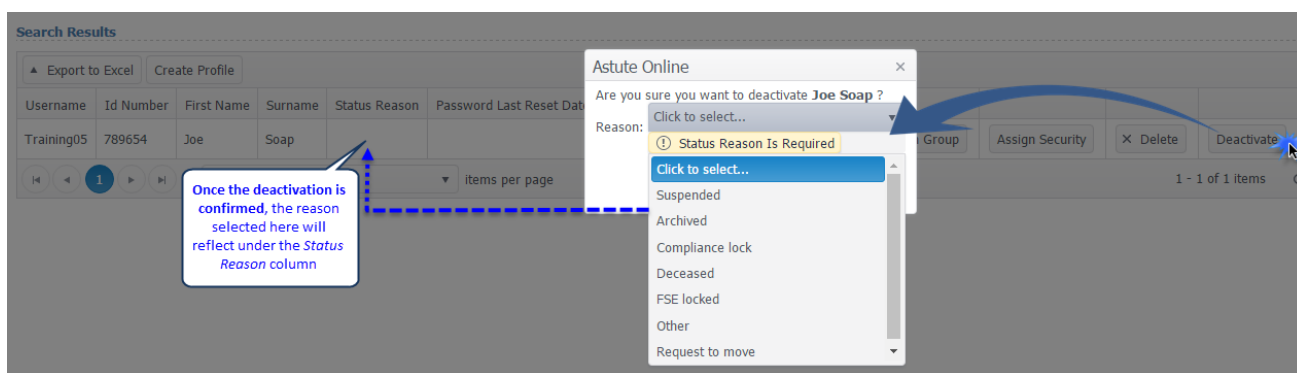
A message will appear once the deactivation is successful and the results screen is updated with the following: the reason for deactivation is clearly visible under the *Status Reason* column and the Deactivate button changes to Activate.
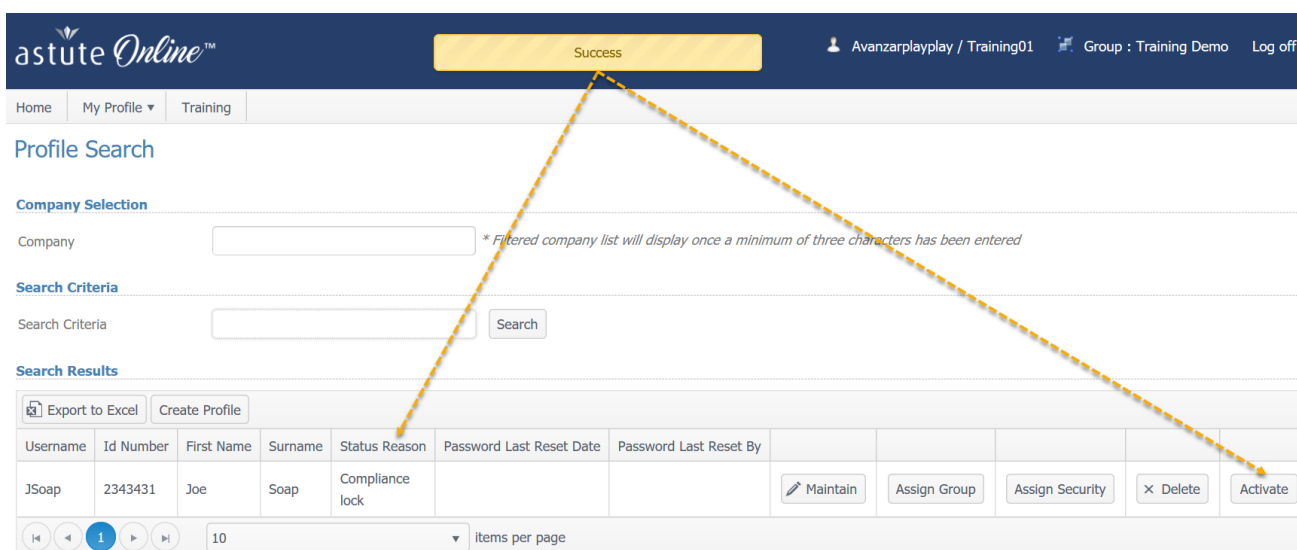
How it affects the User

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
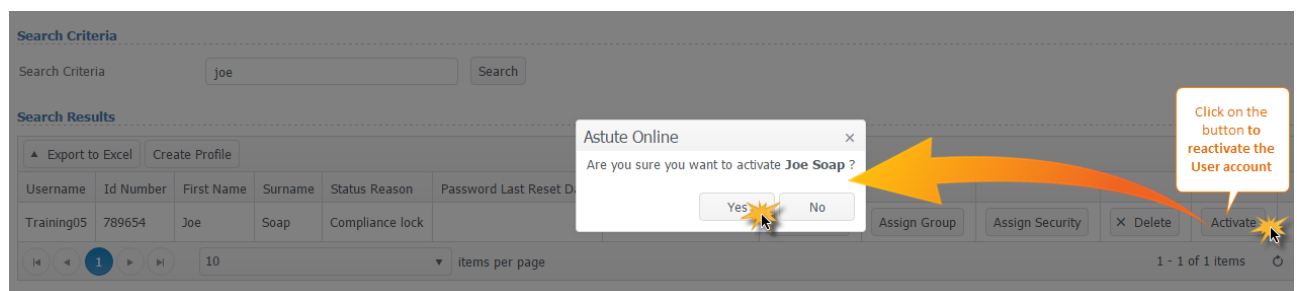
- In the pop-up message box, click on the **'Yes'** button to confirm activation.

- 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.
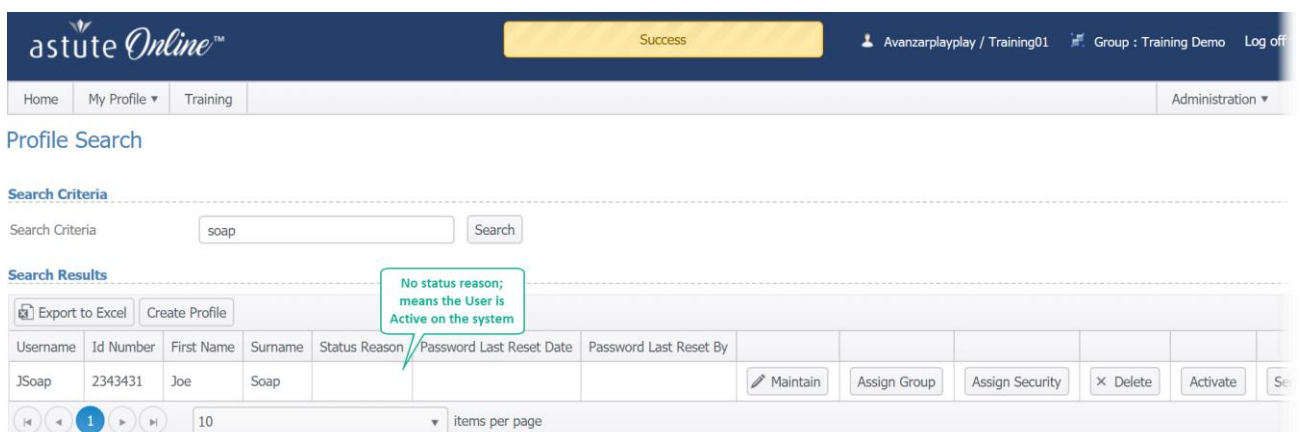
Send Confirmation Email

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

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

Administration ▼

Resending **email for a User to confirm** his/her account

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

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.*