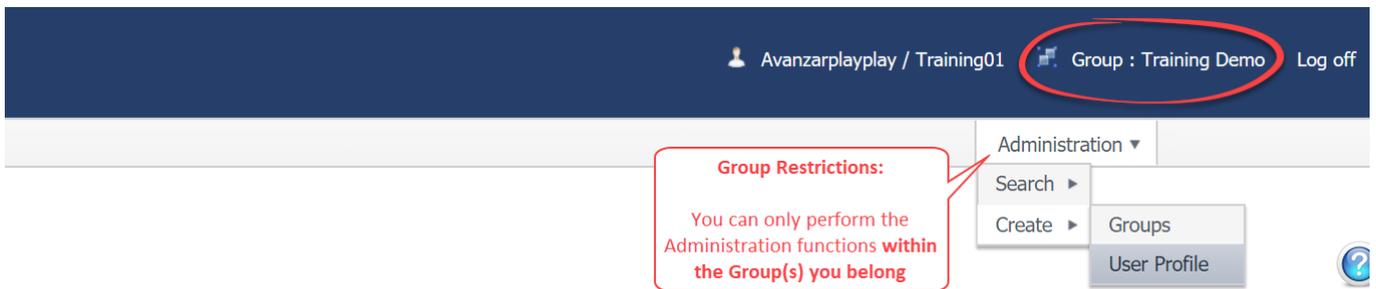


1 Create a User Profile



Users need to be manually captured on the system. Only one User can be captured at a time. There is no limit to the number of Users Administrators can create.

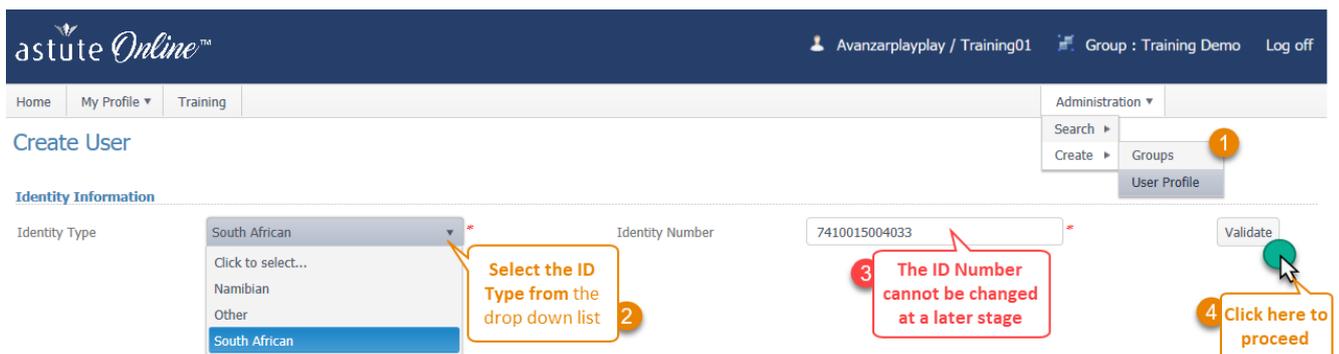
Note:

- **before creating a User**, conduct a Power Search to check if an existing profile exists
- to **make changes** to an existing User profile, click the *Maintain* button from the row of controls
- once a profile is created; the Username, ID Number and Company **cannot be changed** at a later stage

To Create a User Profile

- From the Homepage, click on the **Administration** tab > **Create** > **User Profile** > complete the details on the *Identity Information* screen.

Refer to the User's identity document to ensure the correct ID Number is captured before validating. **Once the system validates the ID number, it cannot be changed at a later stage.**



- Click **Validate** to complete the *Profile Information* Screen
 - The **Company** name, in which the user will be transacting, auto-populates and **cannot be changed**
 - The **Username** should be unique to the User and **cannot be changed at a later stage**. An error message will be displayed if the Username already exists in the database and will need to be changed.



Profile Information

Company	Avanzarplayplay	Administration Level	Standard
Username	Training051	Email Address	j.doe@avanzarplayplay.co.za
Title	Mr	Initials	J
First Name	John	Surname	Doe
Cell Number	0730000001	Work Number	0112140900
Fax Number	+27 10 123 4567	<i>Last Change:</i>	

Profile Attributes

Cancel Save

- Ensure that the **Cell Number and Email Address** fields are captured correctly as **both fields are needed for verification and login purposes**
- The **Administration Level** assigns the User to a role which has specific access levels. The access granted will be determined by your company business rules and the User's role. Type of Users:

Type of Users	Description
System Administrator	This is the Global Administrator (designated Astute Staff) who have the highest access rights <i>i.e. creating all type of Users within different companies, viewing reports and changing systems configurations etc.</i>
Company Administrator	Administers the Company's administration . This User has an overall view of the Company in which s/he belongs and can maintain company specific security claims.
Group Administrator	Administers a Group's administration . This User is restricted to only perform administrative functions and view reports within the Group(s) s/he is assigned to, within the Company.
Standard User	This User has limited rights to only maintain their own profile and process transactions .
Assistant	This User needs to be linked to a Parent profile ; and can only transact and update their own profile.

Profile Information

Company	Avanzarplayplay	Administration Level	Assistant
Username	Training051	Email Address	j.doe@avanzarplayplay.co.za
Title	Mr	Initials	J
First Name	John	Surname	Doe
Cell Number	+27 73 000 0001	Work Number	+27 10 123 4567
Fax Number	+27 10 123 4567	<i>Last Change:</i> 19 Mar 2018 10:48 AM	

Parent Profile Information

Profile: soa
Joe Soap

- Click the **Save** button to save and proceed to *Group Assignment* screen.



Avanzarplayplay / Training01 **Group : Training Demo** Log off

Administration ▾

Create Profile: Group Assignment - John Doe

Avanzarplayplay
 Default Group
 Training Demo

Submit

Group Administrators will only see the Group(s) s/he belongs to

Company Administrators can see all Groups within their company

Tick the Group that the User will be transacting under

Click here to save and proceed to the final step

- Click the **Submit** button to save and proceed to the final step, *Assigning Security* screen.

Assigning security is giving the User access rights to the applicable product(s). This is determined by the Administrator. *Below is an example for CCP Users*

Create Profile: Security Assignment - John Doe

Apply Security Template Apply Template

1 CCP User Management

Tick the functions you want the User to perform on the Product (CCP)

Life and Risk

perform on all 3 types of transactions

Unit Trust

Linked Investment

Ccp Can Download XML
 Perform CCP LK Transaction
 Perform CCP LR Transaction
 Perform CCP Transactions (Global)

Submit

Each User has a minimum function of viewing and updating their profile once logged in. However, only personal details can be updated. Click on the User Management tab to grant this and other relevant access.

Create Profile: Security Assignment - John Doe

Apply Security Template Apply Template

2 CCP User Management

Tick the functions you want the User to perform on Astute Online

Click to save and complete the wizard

Create User Profile
 View User Profile

Submit

- Click in the **Submit** button to complete creating the profile.



Home | My Profile | Training | Administration

Profile Search

Search Criteria
 Search Criteria: Training051 [Search]

Search Results

Export to Excel | Create Profile

Username	Id Number	First Name	Surname	Status Reason	Password Last Reset Date	Password Last Reset By						
Training051	7410015004033	John	Doe				Maintain	Assign Group	Assign Security	X Delete	Deactivate	Send Confirmation Email

10 items per page | 1 - 1 of 1 items

Success:
the account has been created

- Update the Users personal details and change their Administration Level** (points to Maintain)
- Can only link the User to the Group(s) the Administrator is linked to** (points to Assign Group)
- Give the User permission to perform certain functions on the system** (points to Assign Security)
- Provide a reason for permanently deleting or temporarily deactivating a User from the system** (points to Delete and Deactivate)
- For recently created User accounts; where a User hasn't confirmed/verified the account** (points to Send Confirmation Email)

The User will now receive a SMS with a temporary PIN and an email to verify the account. The User should follow the steps in the email before attempting to login into the system.

