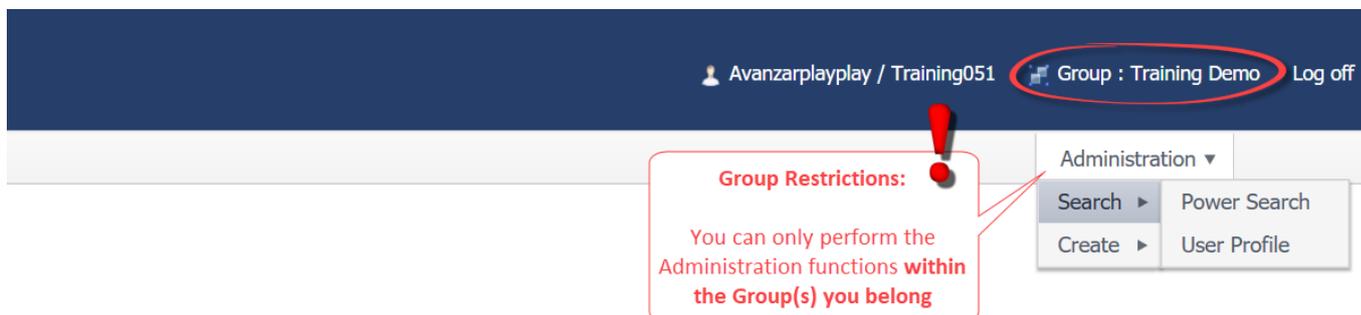


1 Search



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 and Email address.

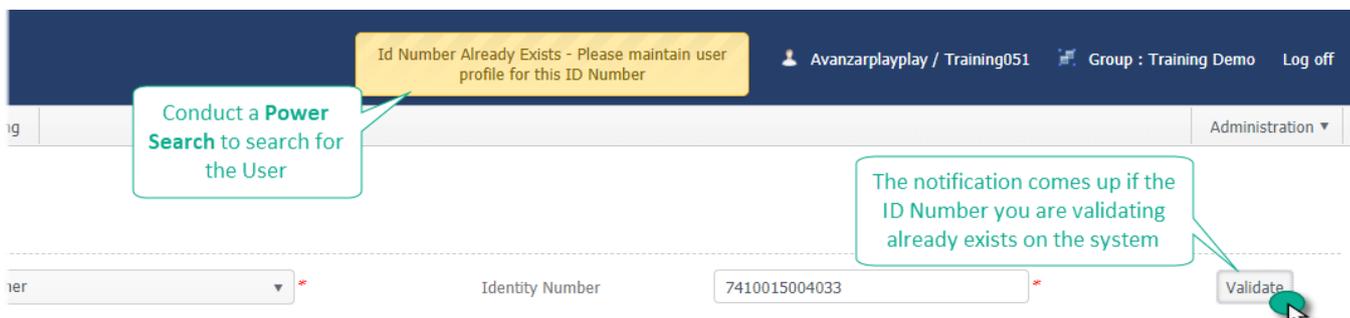
****Search Tips:**

- **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 or 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



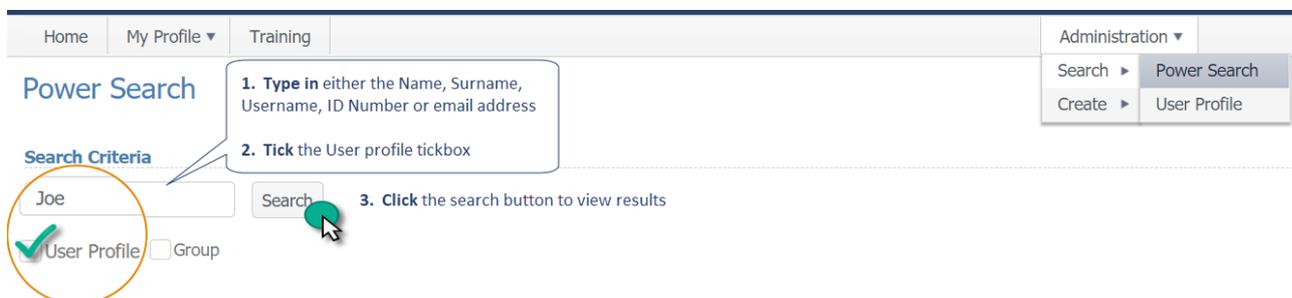
1.1 Power Search

We recommend conducting this **search before creating a new User or Group** to avoid duplication on the system. The system will in any case prevent ID Number duplication by notify the Administrator if the ID Number already exists on the system.

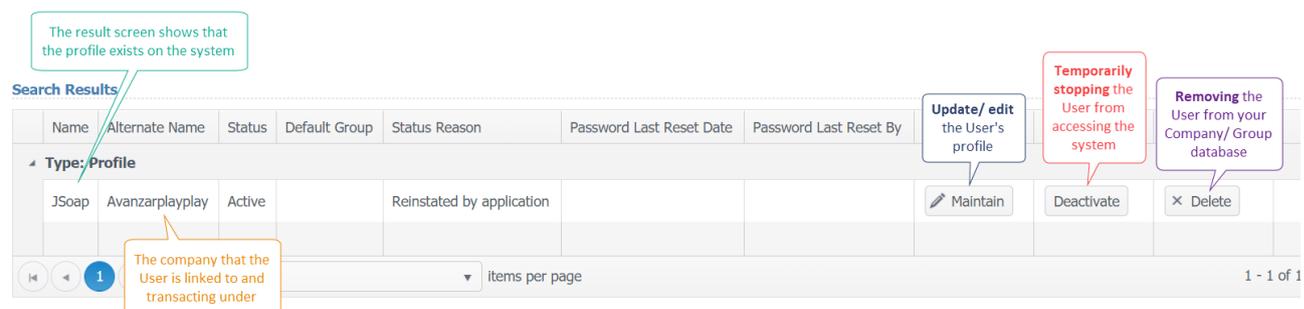


1.1.1 Search for a User

- To search for a User, click on **Administration** tab > **Search** > **Power Search** and complete the **Search Criteria** field.
- Tick the **User Profile** tick box and **click** on the **Search** button to view results.

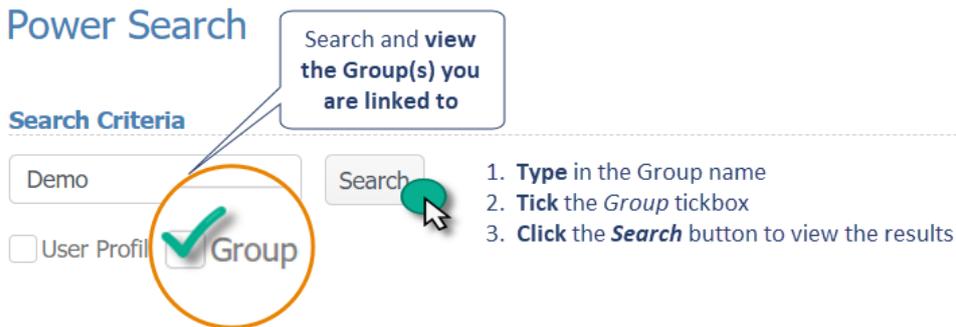


The **results screen provides a summary of the Users profile** i.e. what the Username s/he is using, the Company the User is linked to and transacting under, whether the User can transact on the system or denied access (and the reason thereof) as well as quick controls to manage the profile i.e. update the User profile, deny system access or delete the User from the database.

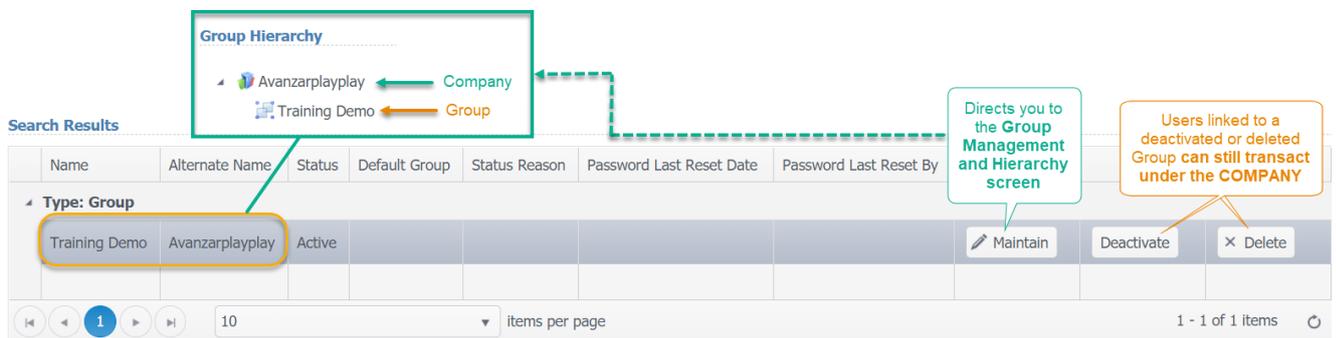


1.1.2 Search for a Group

- To search for a Group, navigate through **Administration** tab > **Search** > **Power Search** and type in the name of the Group in the *Search Criteria* field
- Tick** the *Group* tick box and **click** on the *Search* button to view results.



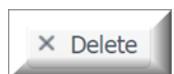
The search results show the name of the Group and the Company under which it belongs. The controls available to Administrators is to Maintain, Deactivate and Delete Groups.



The list of Groups under a Company is listed under the Group Management Screen, under the *Group Hierarchy* heading. Administrators can only edit and Save the Group Name.



Deactivating a Group **will not** prevent Users from logging in and transacting on Astute Online as the Company is still active.

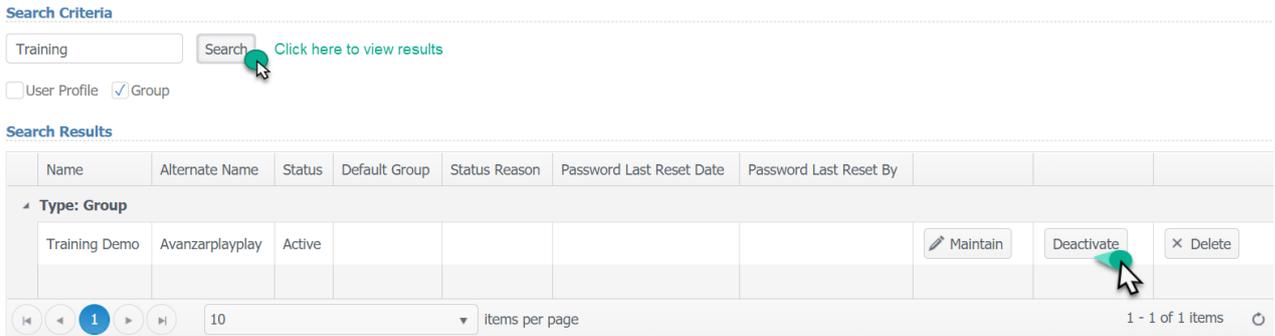


Deleting a Group **will also not prevent** Users from logging in and transacting on Astute Online as the Users will still be transacting under the Company.

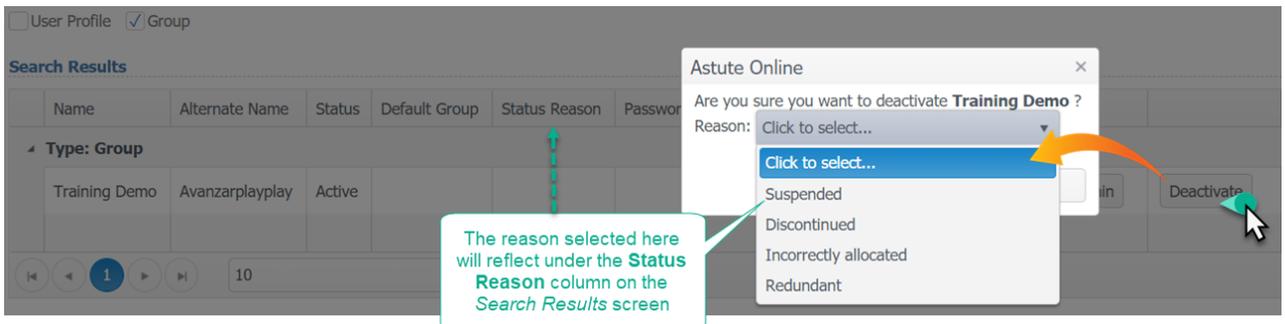


1.1.2.1 Deactivate a Group

- To deactivate a group, search for the Group under **Administration** > **Search** > **Power Search** and complete the search criteria
- Click on the **Search** button to view the results and control buttons



- Click on the **Deactivate** button to prompt the pop-up message below. You will be prompted to provide a reason for deactivation.
- Select the appropriate reason from the drop-down list > click the 'Yes' button to confirm deactivation.



- A message will appear stating that the deactivation was successful.

Note the changes on the Results screen: the *Status* of the Group shows as *Inactive*, the reason for deactivation is clearly seen and the deactivation button changed to *Active*.

****To re-activate the Group, navigate to the Power Search and search for the group. Click on the Activate button.**



astute Online™ Success Avanzarplayplay / Training051 Group : Training Demo Log off

Home My Profile Training Administration

Power Search

Search Criteria

Train Search

User Profile Group

Search Results

Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By			
Type: Group									
Training Demo	Avanzarplayplay	Inactive		Discontinued			Maintain	Activate	Delete

10 items per page 1 - 1 of 1 items

Annotations:
 - The Group has been deactivated (points to Inactive status)
 - The reason selected when deactivating, pulled through (points to Discontinued status reason)
 - Click on the Activate button to reactivate the Group (points to Activate button)

What Does this Mean?

On Under the User's profile, only the Group has been deactivated, the Company is still active.

Astute Online Joe Soap

Avanzarplayplay Company

Training Demo Group

Submit

Annotation: The Group has been deactivated, but the Company is still active

All Users under the deactivated Group are now 'hanging' under the Company, unassigned to a Group. **On CCP, the User will still be able to login but not transact under the Company.**

astute Online™ You need to Select a Group Before Performing your transaction Avanzarplayplay / JSoap No Group Log off

Home My Profile Training Administration

Consolidated Client Portfolio Request

Client Search Details

My Clients

Obtain Digital Consent From Client?

Id/Passport Number 7410015000033

Id Type Other *

Date of Birth 1974/10/01 *

Initials P *

Surname Pomples *

Annotations:
 - You need to Select a Group Before Performing your transaction (points to yellow warning box)
 - Logged in as a User (under a Company that is still active) (points to Avanzarplayplay / JSoap)
 - No Group (points to red circle around No Group)



1.1.2.2 Deleting a Group

- To delete a Group, click on **Administration > Search > Power Search**
- **Type** in the Group name (or at least 3 characters of the name) and **click** on the **Search** button to view results.
- **Click** on the **Delete** button from the row of controls

Power Search

Search Criteria

Train *Click the search button to view results*

User Profile Group

Search Results

Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By			
Type: Group									
Training Demo	Avanzarplayplay	Active					<input type="button" value="Maintain"/>	<input type="button" value="Deactivate"/>	<input type="button" value="Delete"/>

10 items per page 1 - 1 of 1 items

- In the pop-up box, select a reason for deletion.

Search Results

Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By			
Type: Group									
Training Demo	Avanzarplayplay	Active					<input type="button" value="Deactivate"/>	<input type="button" value="Delete"/>	

Astute Online

Are you sure you want to delete **Training Demo** ?

Delete reason:

-
-
-
-

- After selecting a reason, confirm the deletion by clicking the **'Yes'** button. You will receive a message confirming the deletion of the group.

astute Online™ The group was deleted successfully Avanzarplayplay / Training051

Home My Profile Training

Power Search

Search Criteria

Train

User Profile Group

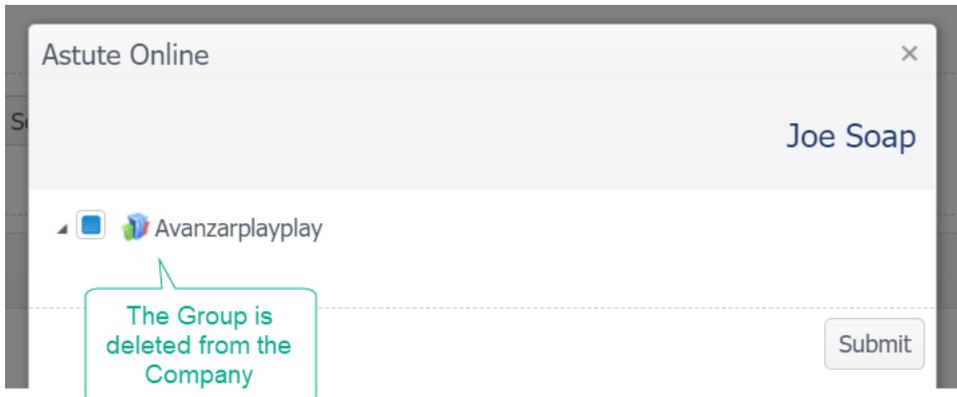
Search Results

No records found.



What Does this Mean?

The Group is removed and will no longer appear under the Company hierarchy and all Users under the deleted Group are left 'hanging' under the Company.



On CCP, Users will still be able to login but not transact.

