

# 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.

		Id Number Already Exists - Please maintain use profile for this ID Number	r 🕹 Avanzarplay;	play / Training051	🕖 Group : Traini	ng Demo Log off
ng	Conduct a <b>Power</b> Search to search for					Administration <b>v</b>
	the User	J	The ID al	e notification co Number you a Iready exists on	omes up if the re validating the system	
ner	*	Identity Number	7410015004033	*		Validate

## 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.

Sear	The rest the profi <b>ch Rest</b>	ult screen shows that le exists on the syste	at em					11-1	Temporarily stopping the	Removing the
4	Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By	the User's profile	accessing the system	User from your Company/ Group database
	JSoap	Avanzarplayplay	Active		Reinstated by application			Maintain	Deactivate	× Delete
×		1 The company User is linked transacting	that the d to and under	]	▼ items per p	age				1 - 1 of





## 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.

Sear	ch Results	Group Hiera 4 🐠 Avar 2 T	archy nzarplayp iraining D	lay 🔶 Co emo 🔶 G	ompany roup	7		Directs you to the Group Management	Users	linked to a ed or deleted
	Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By	and Hierarchy screen	Group car under th	n still transact e COMPANY
4	Type: Group									
	Training Demo	Avanzarplayplay	Active					naintain 🖉	Deactivate	× Delete
		ы 10			▼ items per	page			1 - 1	of 1 items



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

Sear Tra	r <b>ch Criteria</b> ining ser Profile  √Gro	Search	Click her	re to view results	5					
Sear	ch Results									
	Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By			
	Type: Group									
	Training Demo	Avanzarplayplay	Active					Maintain	Deactivate	× Delete
									3	
		▶ 10			<ul> <li>items per per per per per per per per per per</li></ul>	page			1 -	1 of 1 items 🔿

- 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.

	User Profile 🗸 Gro	oup								
Sea	arch Results						Astute (	Dnline	×	
	Name	Alternate Name	Status	Default Group	Status Reason	Passwor	Are you Reason:	sure you want to deactivate <b>Training Dem</b>	ю?	
-	Type: Group				1			Click to select		
	Training Demo	Avanzarplayplay	Active					Suspended	in	Deactivate
				The	e reason selec reflect under th	ted here		Discontinued Incorrectly allocated		¥.
K		▶  10		R S	eason column earch Results	on the screen		Redundant		

• 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 <i>Online</i> ™		Success	<b></b> A	vanzarplayplay / Trai	ning051 📕 Group	: Training Demo Log off
Home My Profile  Training						Administration 🔻
Power Search						
Search Criteria						
Train Search	C					
User Profile Group	Group has deactivated d	The reason selected when leactivating, pulled			Click on the Activate button to reactivate the Group	
Search Results						
Name Alternate Name	Status Default Group Status Reaso	on Password Last Reset Date	Password Last Reset By			
✓ Type: Group						
Training Demo Avanzarplayplay	Inactive Discontinued			Maintain	Activate × Dele	ete
	▼ items pe	er page				1 - 1 of 1 items 🔿

#### 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
by	<ul> <li>Avanzarplayplay</li> <li>Company</li> <li>Training Demo</li> <li>Group</li> </ul> The Group has been deactivated, but the Company is still active	Submit

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 <i>Online</i> ™		You need to Select a G your tra	roup Before Performing nsaction	Avanzarplayplay / JSoap	No Group Log off
Home My Profile  Training				Logged in as a User (under a Company	Administration 🔻
Consolidated Client Por	tfolio Request			that is still active)	
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	Pompies *				





### 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

Ροι	ver Search									
Sear	ch Criteria									
Tra	in	Search	Click t	he search butto	n to view result	S				
U	ser Profile √Gro	pup								
Sear	ch Results									
	Name	Alternate Name	Status	Default Group	Status Reason	Password Last Reset Date	Password Last Reset By			
4	Type: Group									
	Training Demo	Avanzarplayplay	Active					Maintain	Deactivate	× Delete
										13
		▶  10			<ul> <li>items per</li> </ul>	page			1 -	1 of 1 items 🔿

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

arch Results						Astute Online	×		
Name	Alternate Name	Status	Default Group	Status Reason	Passwor	Are you sure you want to delete <b>Training Demo</b> Delete reason: Click to select	•?		
Type: Group						Click to select			
Training Demo	Avanzarplayplay	Active				Redundant		Deactivate	× Delete
						Incorrectly Allocated			
						Discontinued			

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

astute <i>Online</i> ™	The group was deleted successfully	💄 Avanzarplayplay / Training051
Home My Profile  Training		
Power Search		
Train Search		
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.

Astute Online	×
S	Joe Soap
Avanzarplayplay	Submit

#### On CCP, Users will still be able to login but <u>not</u> transact.

astute <i>Online</i> ™		You need to Select a G your tra	iroup Before Performing	Avanzarplayplay / JSoap	No Group Log off
Home My Profile  Training				Logged in as a User (under a Company	Administration 🔻
Consolidated Client Portfolio Request				that is still active)	
Client Search Details My Clients			L		
Obtain Digital Consent From Client?					
Id/Passport Number	7410015000033				
Id Type	Other •	*			
Date of Birth	1974/10/01				
Initials	Р	*			
Surname	Pompies	*			

