SuperChoice ✓
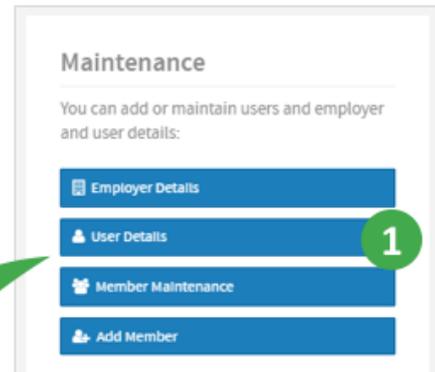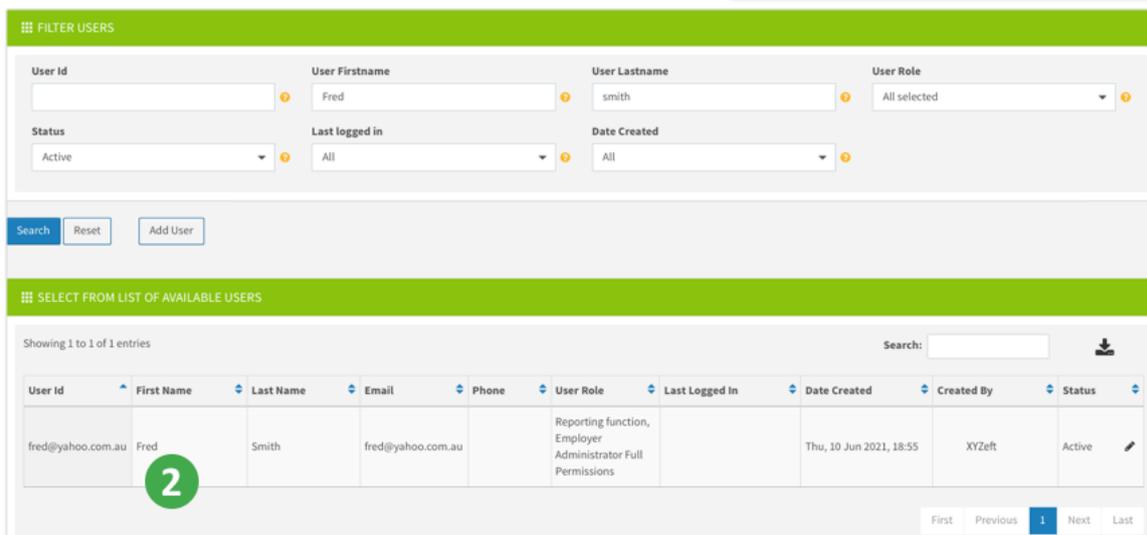
You can maintain certain details about your own user account, such as your password. In addition, if you have an appropriate level of access, you can set up new users.

Review or update User details

1 On the Dashboard view, on the **Maintenance** panel, click the **User Details** button.

Maintenance

You can add or maintain users and employer and user details:

- 📋 Employer Details
- 👤 User Details **1**
- 👥 Member Maintenance
- 👤 Add Member

The User view displays.

2 Select the user to view or adjust from the list of available users by clicking their **User ID** or **Name** in the bottom panel.

If there is a large number of users, use the top panel to filter the list.

Avoid clicking the pencil in the **Status** column as this only enables you to edit the status of the user to either Active or Inactive.

The **User Maintenance** screen displays and provides access to sets of information via tabs across the top. Depending on your access level, you can update account details, contact details, preferences and permissions via roles.
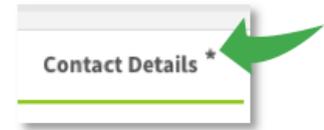
You can move freely through the tabs to access fields of information you are able to edit.

User Maintenance / VStest

| User Account | Contact Details | User Access | Employer Access | Preferences |
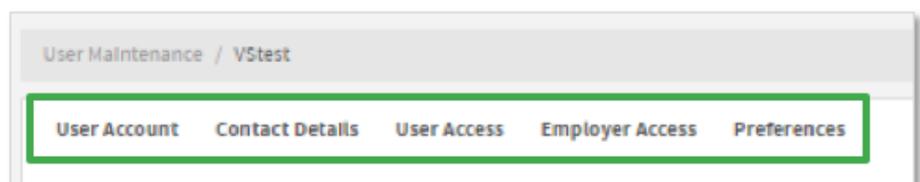
tip **Reset Password** is on the **User Account** tab.

When you make a change on a tab, an asterisk will display
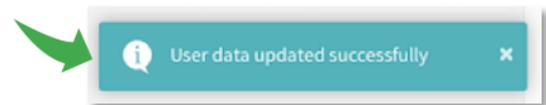to the right of the tab's name to indicate there are unsaved changes.

Before moving to another tab, save any changes by clicking the **Save** button in the bottom left corner.

If you forget to save, the Portal will prompt you to save or discard any changes before moving on.
To keep your changes, click the **Save Changes** button.
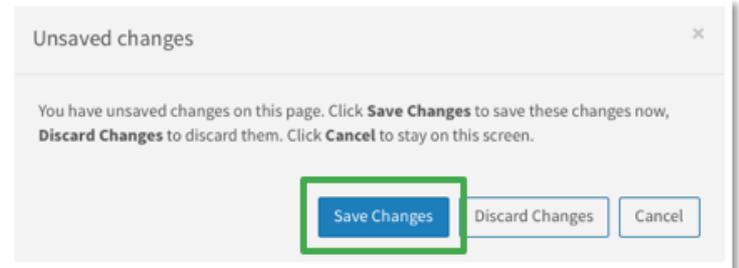
After saving a change, the Portal flashes a confirmation message in the bottom right corner of your screen.

User tabs

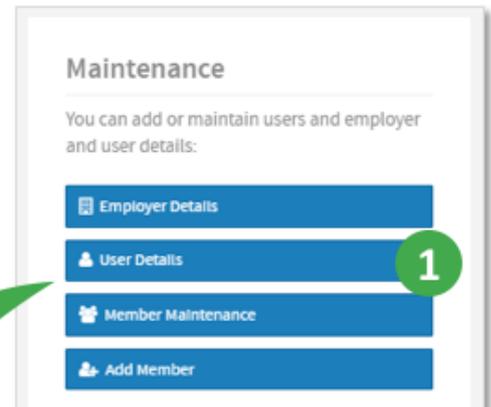The following tabs display across the **User Maintenance** screen.

On this tab…	You can…
User Account	• Update the user's first and last names. • Update the user roles that define the user's permissions. • Use the **Deactivate User** button to change a user's status to Inactive. • Use the **Unlock User** button to unlock a user's locked account. • Use the **Password Reset** button to create a temporary password for the user, which when used by them to log in, prompts the creation of a new password.
Contact Details	Add and update the user's email address and phone numbers.
User Access	• Define the Custodian and User Group settings a new user has access to. • Add and/or remove an existing user's groups. You cannot change an existing user's Custodian details.

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On this tab…	You can…
Product Access	• Manage a user's custodian-specific product assignments.
Employer Access	Manage the employers a user can access, either individually, via User Group access (from the **User Access** tab), or assign all of the custodian employers.
Preferences	Review and update a user's preferences, including allowing them to review file mapping when uploading contribution files, or enabling/disabling the prompt to confirm contributions before submitting.

Create a New User

Depending on your level of access, you will be able to create new users.

1 On the Dashboard view, on the **Maintenance** panel click the **User Details** button.

The User view displays.

2 Click the **Add User** button.

The **New User** screen opens at the **User Account** tab.

3 Complete the fields on the **User Account** tab:

- Type a unique **User ID**. (The user's email address can be used, providing it is unique.)

- If the user will upload contribution files, select the **This user will upload files using sFTP** check box, and then select either *Manually submit files* or *Auto submit files*.

- Type the user's first name and last name.

- Select one or more of the **Available User Roles** from the drop down.

You can click to select one or more roles in this list, or use the **Check All** option to select all available roles.

4 Click the **Next** button to proceed to the next tab.

5 Complete the fields on the **Contact Details** tab:

- Type the user's **Email Address**. The initial login password will be sent to them at this address.

- Type the user's **Landline** (if known) and their **Mobile Phone** number.

6 To proceed to the next tab, click the **Next** button.

7 Complete the fields on the **User Access** tab:

- If the field is available, select the **User Custodian**.

- Click the **Add/Remove User Groups** button, in the popup that displays select user groups, and then click **Update**.

8 To proceed to the next tab, click the **Next** button.

9 Select one of these options on the **Product Access** tab:

- **No Product Access**, if the user should not have access to any products.

- **Products Access**, if the user should have access to certain products. Click the **Add/Remove Products** button, select the products, and then click **Update**.

- **All Products Access**, if the user should have access to all of the custodian's products.

10 To proceed to the next tab, click the **Next** button.

SuperChoice

**11** On the **Employer Access** tab:

- Next to **Employer Access,** click the **Add/Remove Employers** button, select the employers that the user should access, and then click **Update**.

When the new user account is saved, any employers they have access to via User/Employer Groups will display in the **Employers from Groups** panel.

- If the user should have access to all employers and users within a custodian, make a selection, otherwise ignore **All Employers Access.**

12 To proceed to the next tab, click the **Next** button.
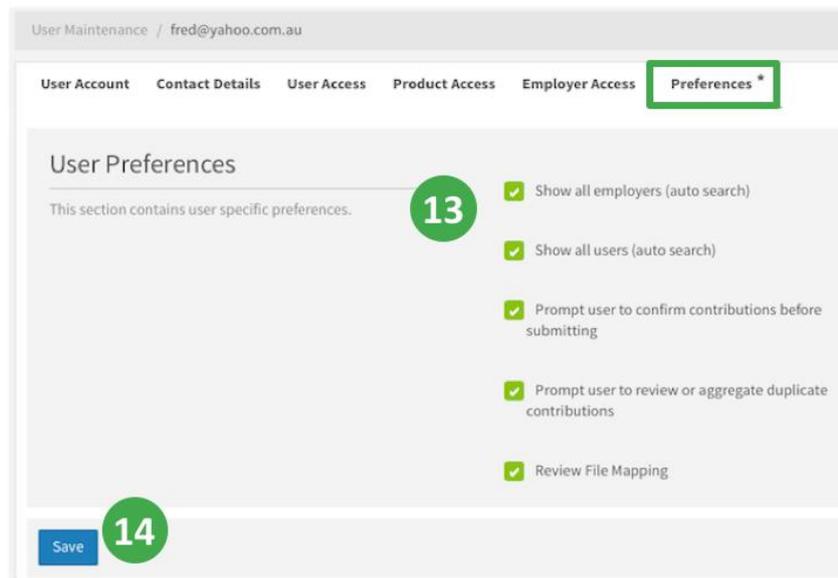
13 Select and unselect the **User Preferences** check boxes as required.

14 To create the user account, click the **Save** button.

After saving, the Portal flashes a confirmation message in the bottom right corner of your screen.
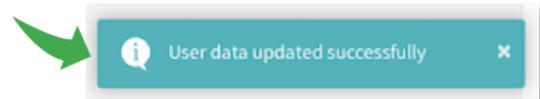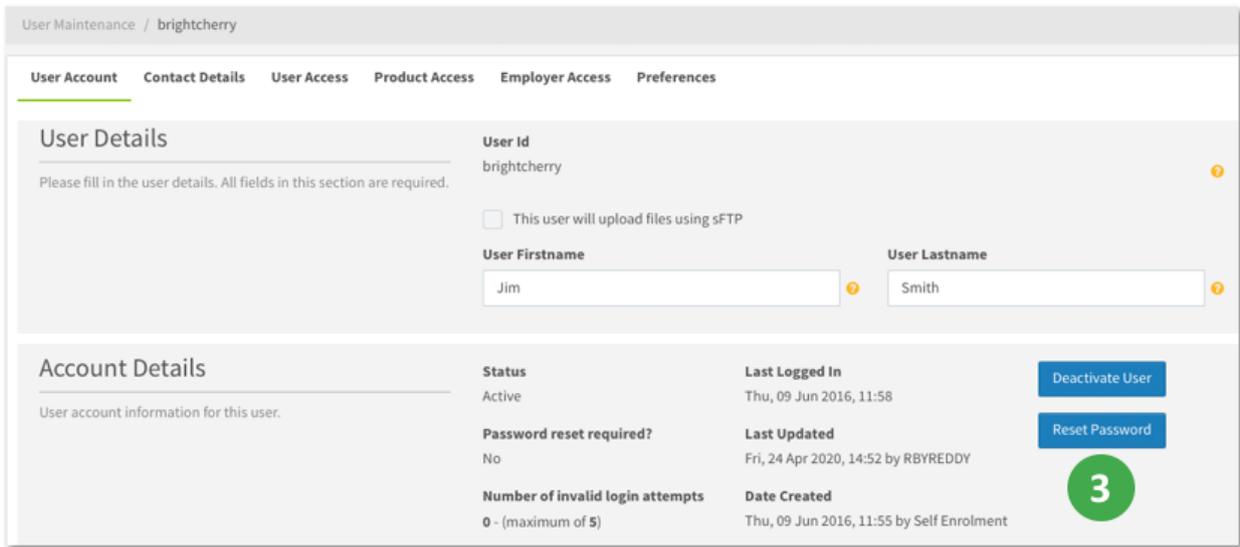
The new user will receive an email with their login details and temporary password. When they login, they will be asked to create a secure password for their account.

Reset a user's password

If a user has forgotten their password, you are able to reset it and create a temporary password for them. A Password Reset Confirmation email will be sent to the user's registered address, with instructions on how to set a new password.

1 On the Dashboard view, on the **Maintenance** panel, click the **User Details** button.

The User view displays.

2 Search for the user whose password you want to reset, and then click anywhere on their row.
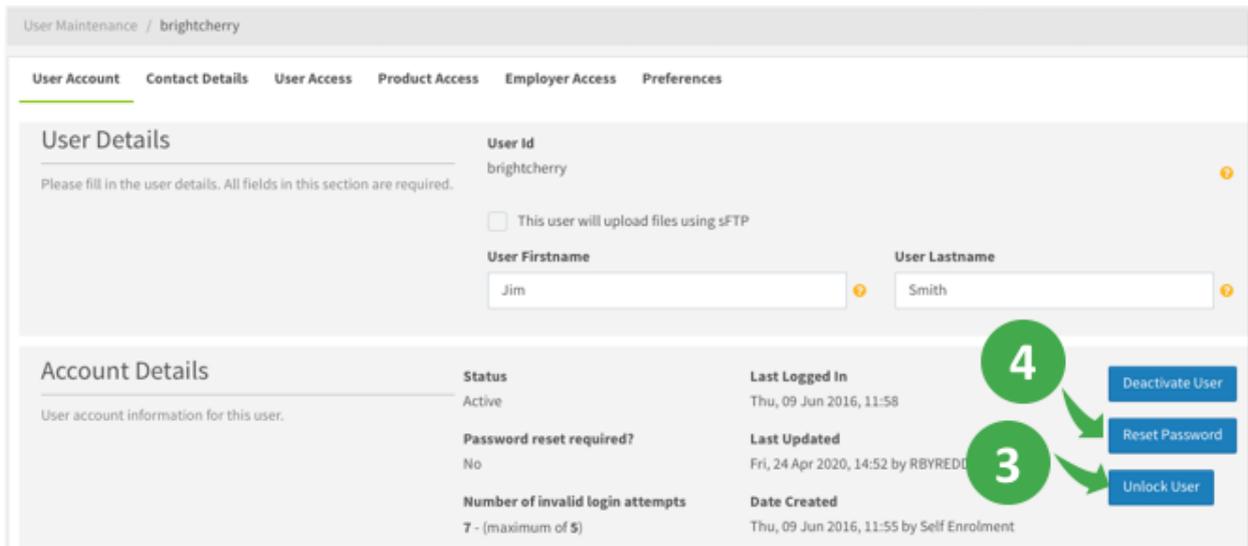
The **User Maintenance** screen displays.

3 On the **User Account** tab, click the **Reset Password** button.

The Portal displays a message that the password has been reset successfully and sends an email with instructions to the user.
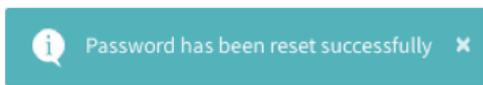
Unlock a user

If a user has unsuccessfully attempted to log in to the Portal five (5) times, their account becomes locked. Their account must be unlocked to set the number of invalid log in attempts back to zero (0).

1 On the Dashboard view, on the **Maintenance** panel, click the **User Details** button.

The User view displays.

2 Search for the user whose account you want to unlock, and then click anywhere on their row.

The **User Maintenance** screen displays.

3 On the **User Account** tab, click the **Unlock User** button.

This button only displays when a user has exceeded the maximum login attempts.

The Portal displays a message that the user has been unlocked successfully.

Although the user's number of invalid login attempts is reset to zero, you must now reset their password so that they can log in.

4 Click the **Reset Password** button.

The Portal displays a message that the password has been reset successfully and sends an email with instructions to the user.

SuperChoice ✓

Deactivate a user and make them inactive

If a user has left an organisation, for security their account should be made inactive so they can no longer log into the Portal.

> In the Portal a **deactivated** user is known as an **inactive** user.
>
> You can only deactivate a user account, it is not possible to delete a user account.

1 On the Dashboard view, on the **Maintenance** panel, click the **User Details** button.

The User view displays.

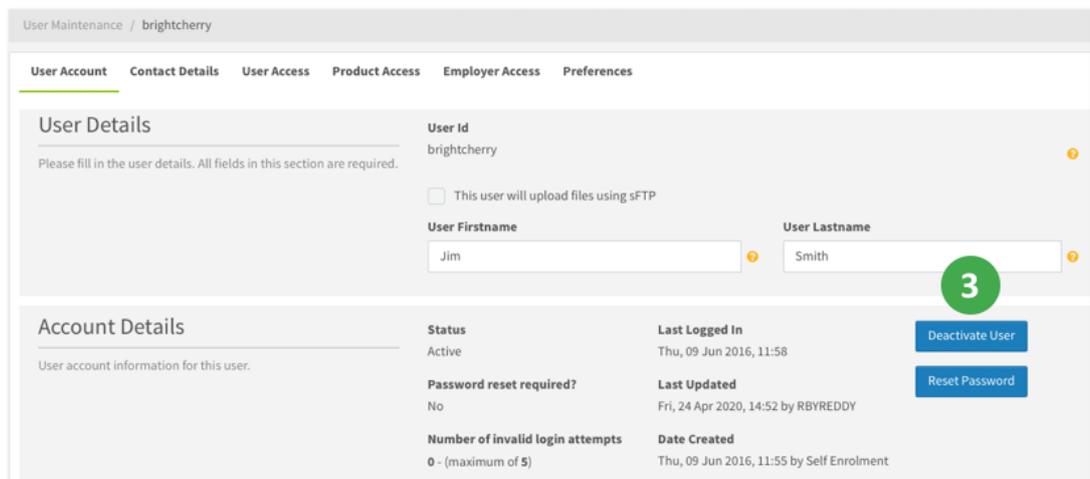**2** Search for the user who you want to make inactive.

3 Make the user inactive via one of the following ways.

- Click on the Change User Status icon 🖉 at the end of the user's row. Then on the confirmation popup, click **OK**.
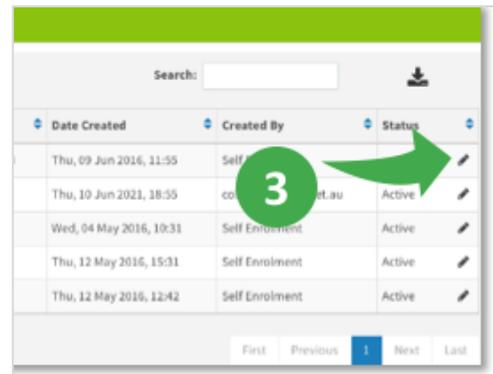
- Click anywhere on the user's row. Then on the **User Maintenance** screen, on the **User Account** tab, click the **Deactivate User** button.

The user's status updates to *Inactive*.