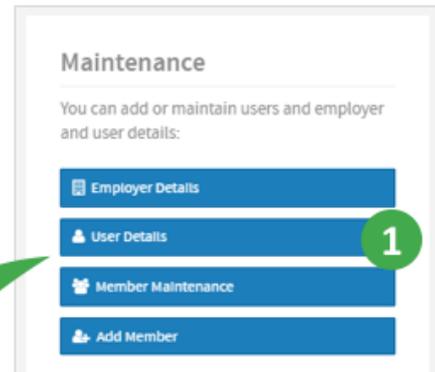


9. Updating User Details

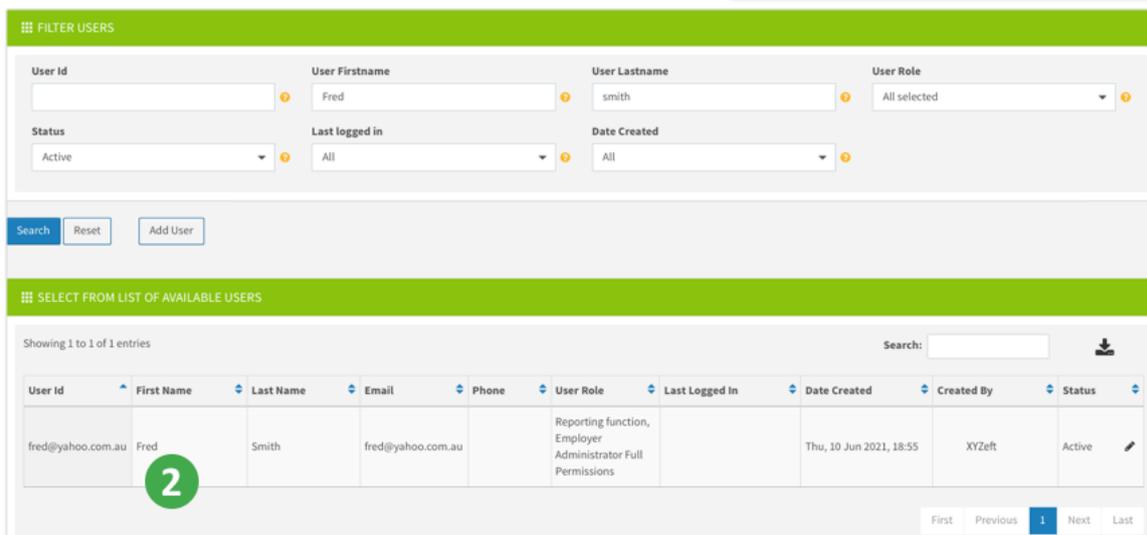
You can maintain certain details about your own user account, such as your password. In addition, if you have an appropriate level of access, you can set up new users.

Review or update User details

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



The User view displays.



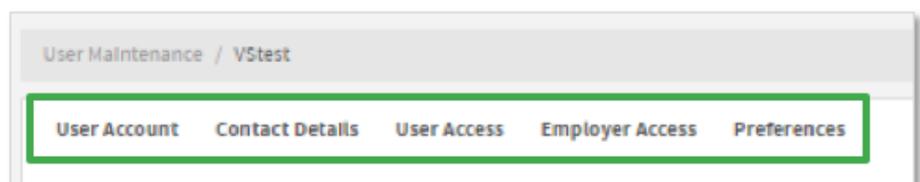
- 2 Select the user to view or adjust from the list of available users by clicking their **User ID** or **Name** in the bottom panel.

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.

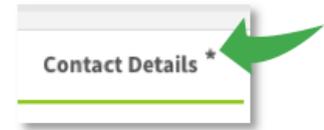
You can move freely through the tabs to access fields of information you are able to edit.



tip **Reset Password** is on the **User Account** tab.

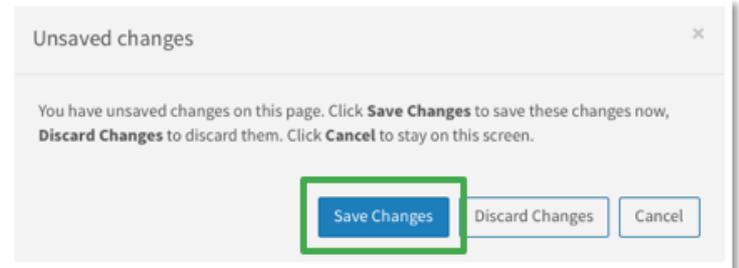
9. Updating User Details

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.

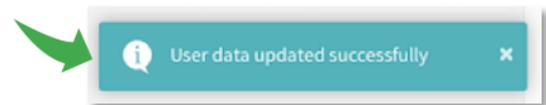


Before moving to another tab, save any changes by clicking the **Save** button in the bottom left corner.

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.

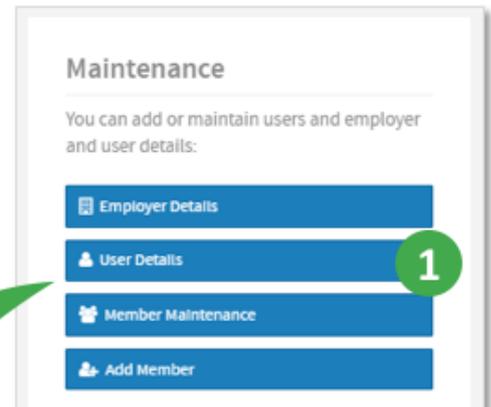
On this tab...	You can...
User Account	<ul style="list-style-type: none">● Update the user's first and last names.● Update the user roles that define the user's permissions.● Use the Deactivate User button to change a user's status to Inactive.● Use the Unlock User button to unlock a user's locked account.● 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	<ul style="list-style-type: none">● Define the Custodian and User Group settings a new user has access to.● Add and/or remove an existing user's groups. <p>You cannot change an existing user's Custodian details.</p>

On this tab...	You can...
Product Access	<ul style="list-style-type: none">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.

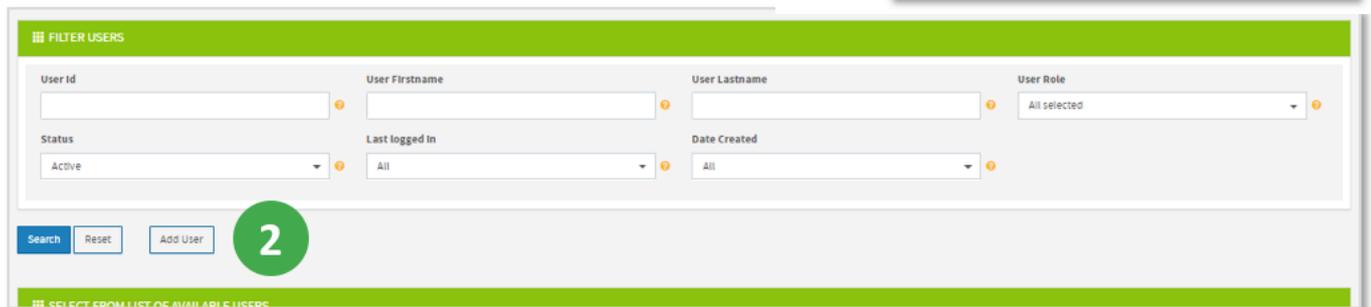
Create a New User

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.



The image shows a 'FILTER USERS' section with the following fields: 'User Id', 'User Firstname', 'User Lastname', 'User Role', 'Status', 'Last logged in', and 'Date Created'. Below these fields are three buttons: 'Search', 'Reset', and 'Add User'. The 'Add User' button is highlighted with a green circle containing the number '2'. Below the buttons is a green bar with the text 'SELECT FROM LIST OF AVAILABLE USERS'.

- 2 Click the **Add User** button.

9. Updating User Details

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

User Maintenance / New User

User Account Contact Details User Access Employer Access Preferences

3

New User

Enter a unique user ID. A temporary password will be automatically sent to the new user when saved.

User Id

This user will upload files using sFTP

User Firstname

User Lastname

User Roles

This section allows you to manage user roles.

Available User Roles

Select User Role

Assigned User Roles

Select at least one role.

Save Cancel **4** Next

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.

User Maintenance / New User

User Account * Contact Details * User Access Product Access Employer Access Preferences

5

Contact Details

Contact details for this user.

Email Address

Landline

Mobile Phone

Save **6** Next

- 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.

User Maintenance / New User

User Account Contact Details **User Access** Product Access Employer Access Preferences

User Custodian

This section allows you to select the custodian. Please note that the custodian can not be changed once the user account has been created.

User Custodian
SUPERPAY

User Group Access

This section will give this user access to the selected user groups

Add/Remove User Groups

User Groups

AS User Group	
Aployer User Group	

1

Save Cancel **Next**

- 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.

11

On the **Employer Access** tab:

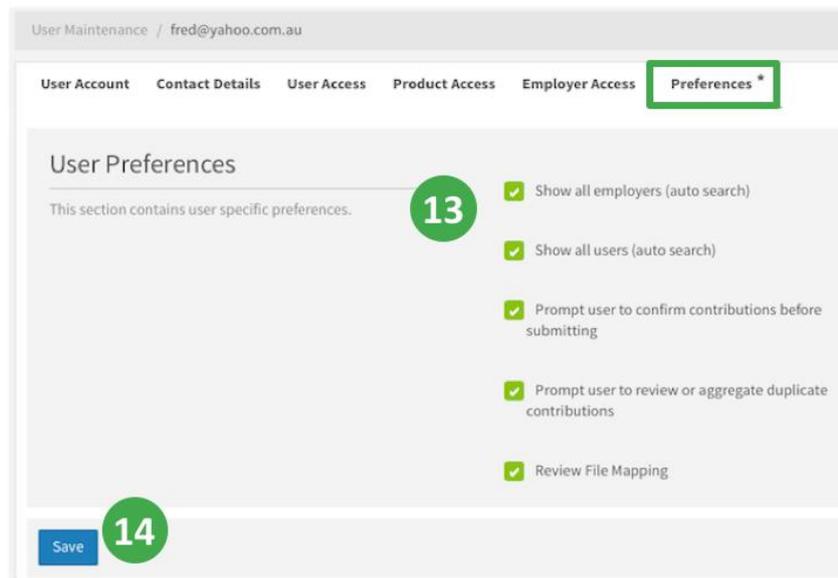
- Next to **Employer Access**, click the **Add/Remove Employers** button, select the employers that the user should access, and then click **Update**.

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.



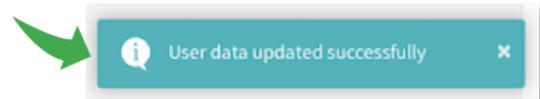
13

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.

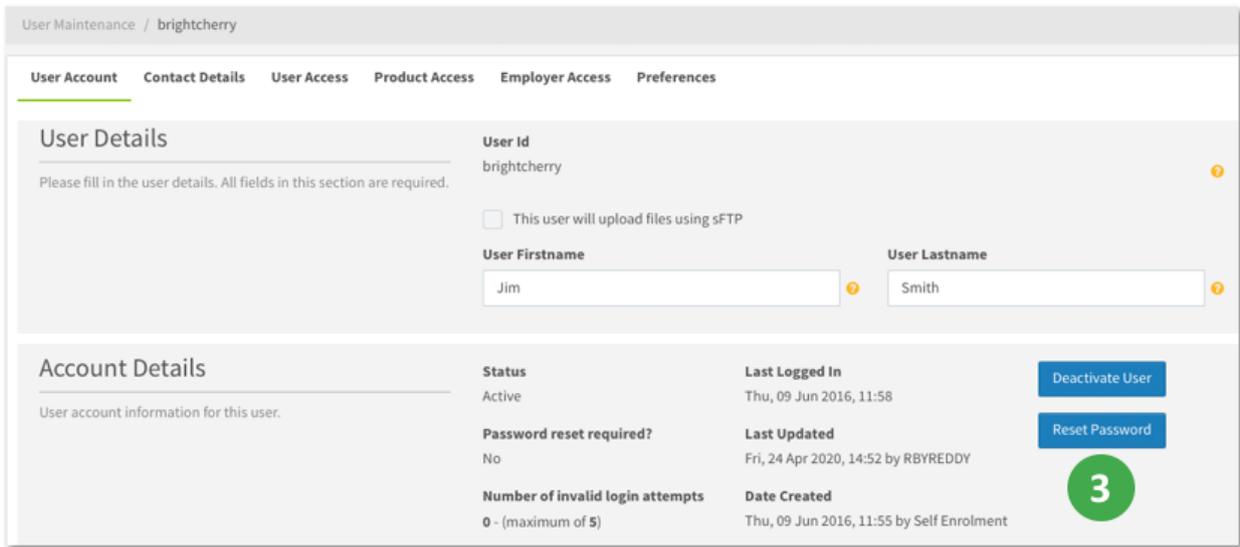


The new user will receive an email with their login details and temporary password. When they login, they will be asked to create a secure password for their account.

Reset a user's password

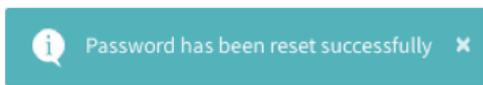
If a user has forgotten their password, you are able to reset it and create a temporary password for them. A Password Reset Confirmation email will be sent to the user's registered address, with instructions on how to set a new password.

- 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.



The screenshot shows the 'User Maintenance' interface for user 'brightcherry'. It features a navigation bar with tabs: 'User Account', 'Contact Details', 'User Access', 'Product Access', 'Employer Access', and 'Preferences'. The 'User Account' tab is active. The 'User Details' section includes a note: 'Please fill in the user details. All fields in this section are required.' Below this are fields for 'User Id' (brightcherry), a checkbox for 'This user will upload files using sFTP', 'User Firstname' (Jim), and 'User Lastname' (Smith). The 'Account Details' section shows 'Status' (Active), 'Last Logged In' (Thu, 09 Jun 2016, 11:58), 'Password reset required?' (No), 'Last Updated' (Fri, 24 Apr 2020, 14:52 by RBYREDDY), 'Number of invalid login attempts' (0 - (maximum of 5)), and 'Date Created' (Thu, 09 Jun 2016, 11:55 by Self Enrolment). Two buttons are visible: 'Deactivate User' and 'Reset Password', with a green circle containing the number '3' highlighting the 'Reset Password' button.

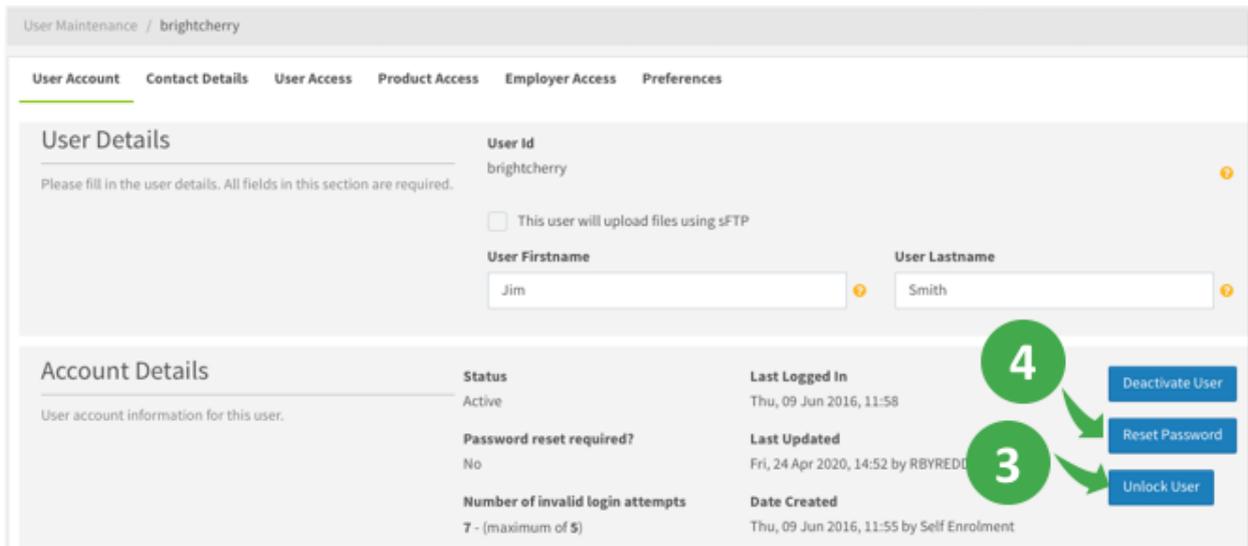
- 3** On the **User Account** tab, click the **Reset Password** button.
The Portal displays a message that the password has been reset successfully and sends an email with instructions to the user.



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.



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.

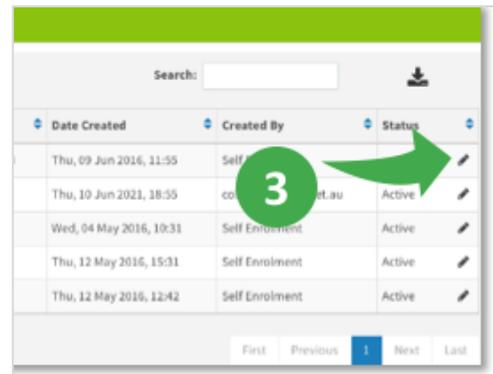
You can only deactivate a user account, it is not possible to delete a user account.

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.

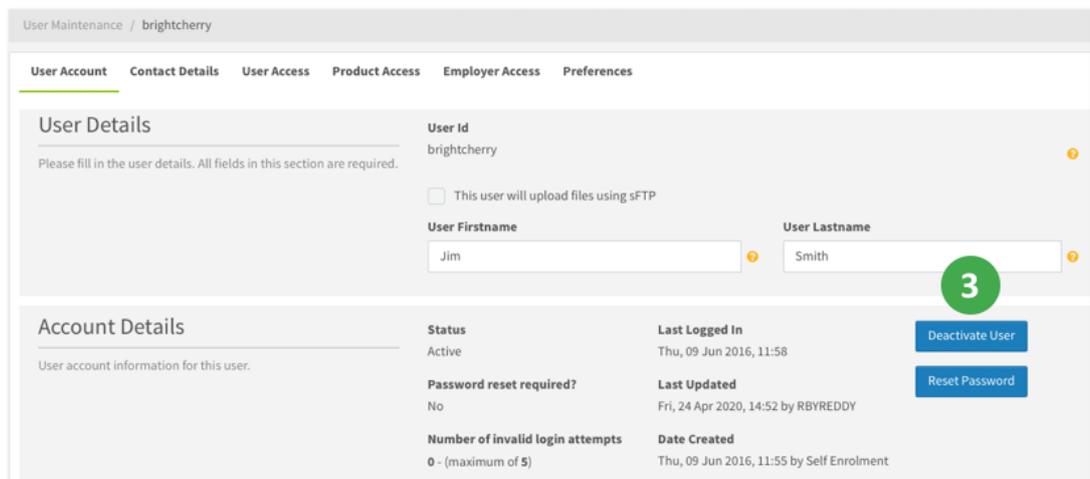
3 Make the user inactive via one of the following ways.

- Click on the Change User Status icon  at the end of the user's row. Then on the confirmation popup, click **OK**.



Date Created	Created By	Status
Thu, 09 Jun 2016, 11:55	Self	Active
Thu, 10 Jun 2021, 18:55	col...t.au	Active
Wed, 04 May 2016, 10:31	Self Enrolment	Active
Thu, 12 May 2016, 15:31	Self Enrolment	Active
Thu, 12 May 2016, 12:42	Self Enrolment	Active

- Click anywhere on the user's row. Then on the **User Maintenance** screen, on the **User Account** tab, click the **Deactivate User** button.



User Maintenance / brightcherry

User Account | Contact Details | User Access | Product Access | Employer Access | Preferences

User Details

Please fill in the user details. All fields in this section are required.

User Id: brightcherry

This user will upload files using sFTP

User Firstname: Jim

User Lastname: Smith

Account Details

User account information for this user.

Status: Active	Last Logged In: Thu, 09 Jun 2016, 11:58	Deactivate User
Password reset required?: No	Last Updated: Fri, 24 Apr 2020, 14:52 by RBYREDDY	Reset Password
Number of invalid login attempts: 0 - (maximum of 5)	Date Created: Thu, 09 Jun 2016, 11:55 by Self Enrolment	

The user's status updates to **Inactive**.