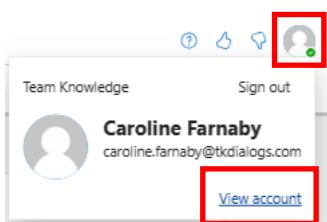


How To.... Manage User Profiles

This document serves as a guide to managing Account Administration, specifically focusing on accessing and updating your User Profile. The User Profile is where key personal and account information is stored, ensuring your account is secure and up to date. This guide will cover two important aspects of user management:

1. **Editing your profile:** Understand how to update your personal details, including your contact information, ensuring that your account contains correct and current data.
2. **Changing your Password:** Learn how to update your password securely, ensuring your account is protected.

By following this guide, you can maintain your account information effectively, ensuring smooth access to the system and safeguarding your personal data. This proactive management of your User Profile is vital for both security and the overall user experience.



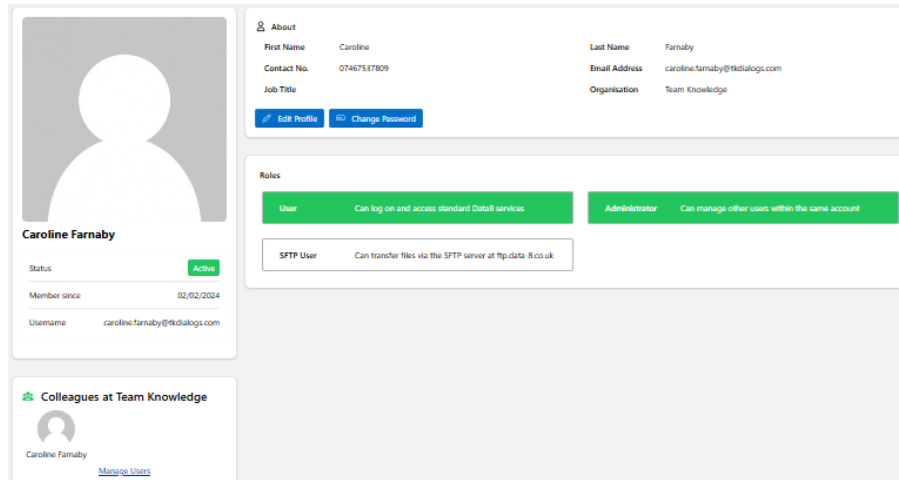
To view your profile information, click the **View Profile** button, located in the top right corner of the screen. See screenshot left.

A pop-up window will be displayed, showing:

- Your company name,
- A link to *Sign out* of the system,
- Your name,
- Email address, and
- A link to view your account details.

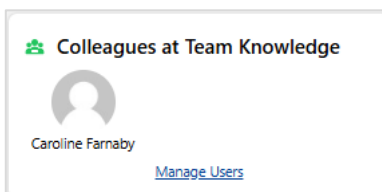
Click the **View account** link which can be found at the bottom right of the pop-up window.

A new window will be displayed. See screenshot below.



The top left box of this screen displays the following information:

- Your profile picture (if uploaded)
- Your name
- Your account status (e.g., active)
- The start date of your access
- Your username (**N.B.** this is usually your email address and cannot be changed).

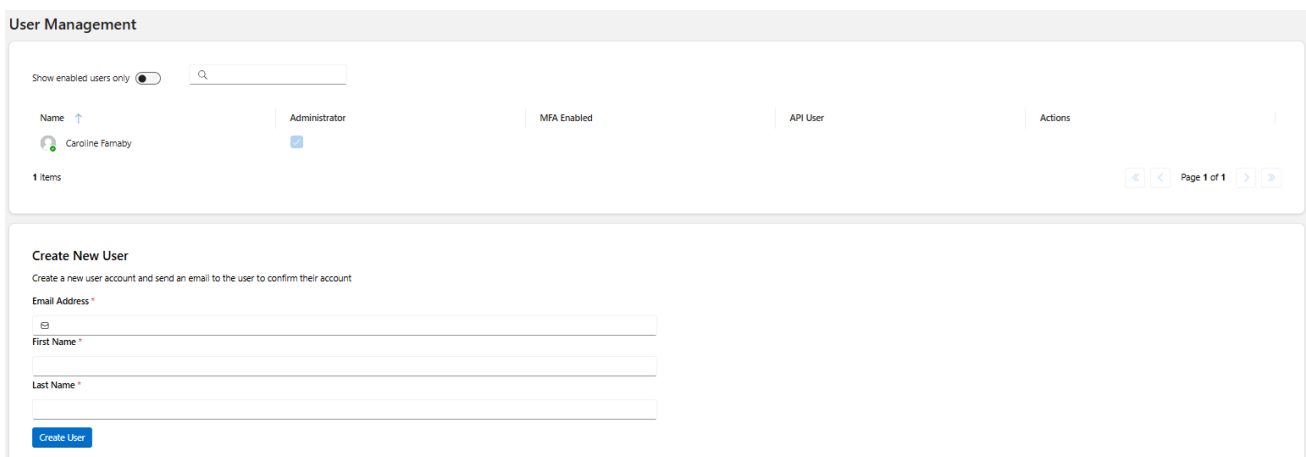


Below this is a box which displays all users from your company who have access to the system.

If you are an account administrator, a **Manage Users** link will be displayed at the bottom of this box.

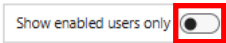
To add a new user, click on **Manage Users**.

The *User Management* screen will be displayed. See screenshot below.



The top section of the screen provides detailed information about each user from your organisation.

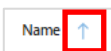
In the top left, there is a toggle button that enables you to select whether to view only active users or all users.



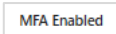
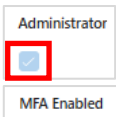
To the right of this there is a search bar, making it easy to find specific colleagues within your business.



Below, there are five headers:



1. **Name:** Displays the full names of all colleagues from your organisation with system access. To the right of **Name** is a sorting arrow that enables you to sort names alphabetically in ascending or descending order.
2. **Administrator:** A checkmark indicates that the user is an administrator within the system.
3. **MFA Enabled:** A checkmark indicates that Multi-Factor Authentication (MFA) is enabled for that user.
4. **API User:** A checkmark indicates that the user has access to utilise API's (Application Programming Interfaces) within the solution.
5. **Actions:** This option enables administrators to manage other users within their organisation. Admins can approve or reject user requests, as well as enable or disable user accounts.



The bottom left of the top section; the total number of users is displayed.

On the right-hand side, the total number of pages is displayed, and if there are multiple pages, navigation arrows will enable you to move through the information.

Create New User

Create a new user account and send an email to the user to confirm their account

Email Address *

First Name *

Last Name *


[Create User](#)

The *Create New User* widget is displayed at the bottom of the *User Management* screen. This widget allows an administrator to create a new user account, triggering an email to be sent to the user to confirm their account, (see screenshot left).

To create a new user, the following information must be provided:

1. Email Address
2. First Name
3. Last Name

All fields in the widget are mandatory, as indicated by the * next to each field.

Click the **Back**  arrow on your web browser to return to the previous screen.

Displayed in the top right of the screen, you will find the *About* section. This area displays your personal information which is saved in the system. This information includes your first and last name, contact telephone number, email address, job title, and organisation name.

If any details are incorrect, you can update them by clicking the **Edit Profile** button.

This will open the *Update Profile* pop-up (see screenshot left), where you can update most of the information described above.

Please note that your email address cannot be changed, as it also serves as your username.

Fields marked with a red asterisk * are mandatory and must be completed before making any updates.

After correcting any inaccurate information, click the *Update* button located at the bottom right of the screen.

If you prefer not to make changes and continue using the system, simply click *Cancel*.


In this example we won't update any details, so please click **Cancel** to return to the original screen.

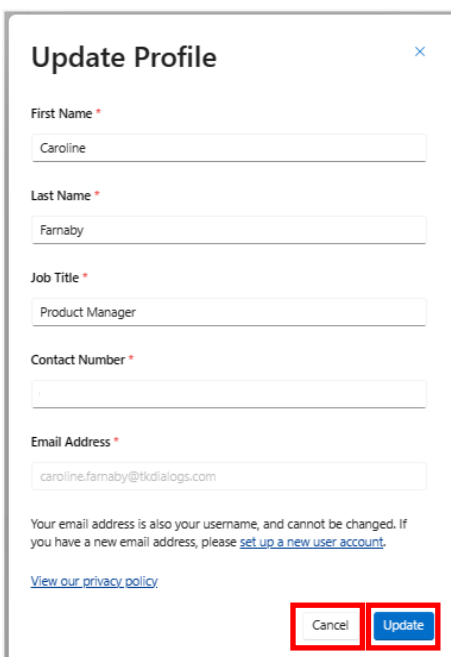
Click the **Change Password** button to update your password.

A *Change Password* pop-up screen will be displayed.


To ensure the highest level of security, Data8 has set specific criteria that your new password must meet:

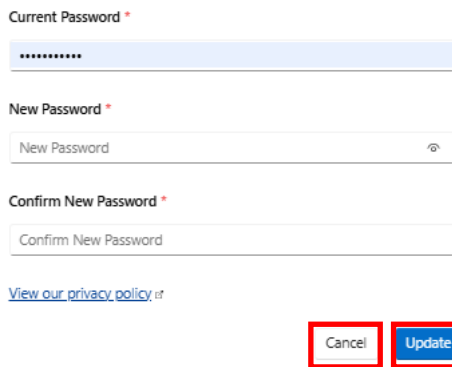
- Must be at least 10 characters long
- Must include characters from the following categories:
 - Upper-case letters
 - Lower-case letters
 - Numbers
 - Special Characters
- Must not contain common password phrases (e.g. "password")
- Must not include your username

 Edit Profile



The screenshot shows a modal window titled "Update Profile" with a close button (X) in the top right corner. It contains several input fields, each with a red asterisk indicating it is mandatory: "First Name" (containing "Caroline"), "Last Name" (containing "Farnaby"), "Job Title" (containing "Product Manager"), "Contact Number", and "Email Address" (containing "caroline.farnaby@tkdialogs.com"). Below the email field, there is a note: "Your email address is also your username, and cannot be changed. If you have a new email address, please [set up a new user account](#)." A link for "View our privacy policy" is also present. At the bottom right, there are two buttons: "Cancel" and "Update", both of which are highlighted with red boxes.

 Change Password



Current Password *

.....

New Password *

New Password

Confirm New Password *

Confirm New Password

[View our privacy policy](#)

Cancel Update

The lower section of the *Change Password* pop-up enables you to change your password. The following fields will be displayed:

- *Current Password*: This field will contain your current password.
- *New Password*: Enter your new password, ensuring it meets the specific criteria outlined above.
- *Confirm New Password*: Re-enter your new password to confirm the change.

All fields are mandatory, as indicated by the * next to each one.

There is a link to Data8's privacy policy, this allows you to see how your data is stored and handled.

Once you have changed your password, click the *Update* button located at the bottom right of the screen.

If you decide not to change the password, simply click *Cancel* to continue using the system without any updates.

In this example we won't change the password, please click **Cancel** to return to the previous screen.

The bottom right of the screen, contains information about *Roles* which are available.

- *Roles* highlighted in green are the ones assigned to you.
- *Roles* displayed in white are available but not assigned to you. See screenshot below.



Roles

User	Can log on and access standard Data8 services	Administrator	Can manage other users within the same account
SFTP User	Can transfer files via the SFTP server at ftp.data-8.co.uk		

This concludes the process of accessing and updating your user profile.