

C. User Profile

1. Profile

Select the User Profile tab located at the top right of the screen.

The screenshot shows the CONFIRMATION user interface. At the top right, the 'USER PROFILE' tab is highlighted in a yellow box. Below the navigation menu, there are links for 'Profile (view or update user information)', 'Settings (manage the way the application works)', and 'Credentials (manage username and password)'. The main content area displays a table of user records with columns for Account ID, Client Name, Aging, As of Date, Form, Received, and Clerk. The table contains three rows of data.

Account ID	Client Name	Aging	As of Date	Form	Received	Clerk
987654	Jessie S Solutions	< 1 days	06/30/2018	ZA - Asset	03/25/2020	-
5101520	123 (Pty) Ltd	12 days	01/31/2020	EMEA - Consolidated	03/09/2020	-
3691215	123 (Pty) Ltd	12 days	01/31/2020	EMEA - Consolidated	03/09/2020	-

Update Profile (User Information) and select the save button.

The screenshot shows the 'User Profile for Gregor Clegane' form. The form is divided into several sections:

- Personal Information:** First Name (Gregor), Last Name (Clegane), Email (gcleane@noemail.com), Phone (0104940000), Ext., Fax, Mobile Country Code (dropdown), Mobile Phone, and Job Title (Supervisor).
- Responder:** SA Training Bank - CQS.
- User Status:** Active (selected) or Inactive.
- User Type:** Supervisor (dropdown).
- Applications:** Confirmation (checked) and Credit Inquiry (unchecked).
- Departments:** A dropdown menu with 'SA Training Bank Business Banking' highlighted in a yellow box, along with 'SA Training Bank Commercial' and 'SA Training Bank Corporate'.

 At the bottom of the form, there are 'save' and 'close' buttons, and a note that an asterisk denotes a required field. A 'Privacy Statement' link is also present.

Note: The first department that reflects is known as the Home Department. All default reporting and statuses will be of the Home Department. If the Home Department needs to be changed, the User Admin will need to remove all departments and add the new Home Department as the first department before adding the remaining departments.

2. Settings

Update *Settings* (the way the application works) and select the *save* button.

- To adjust the system time zone or date/time format, select the desired option from the dropdown lists. To receive daily notification emails, select Enabled on the left of the screen.

User Profile - Settings
[close](#)

Notification Emails

Enabled
 Disabled

Default Department

SA Training Bank Business Bankin ▼

Localization

Language *
English(English)

Time Zone

(GMT-05:00) Eastern Time (US & Canada) ▼

Date/Time Format **

English (United States) MM/dd/yyyy hh:mm tt ▼

* Language is modified using the Location/Language link at the top of the login page.

** System dates and text are displayed according to the settings above. Manually entered text and dates will display as entered by the user.

save
close

3. Credentials

Update *Credentials* (manage username and password) and select the *save* button.

User Profile - Credentials
[close](#)

User ID

Current User ID *

AdaptSA2 save

Password

The guidelines below must be followed to ensure strict security when changing your password.

Current Password * **New Password *** **(confirm) New Password ***

save

Password Guidelines

- Must contain 8-15 characters
- Must use 3 of the 4:
 - (at least one) Upper case character (A-Z)
 - (at least one) Lower case character (a-z)
 - (at least one) Number (0-9)
 - (at least one) Special character (!@#&*+~)
- May not contain three (3) consecutive identical or sequential characters
- May not contain five (5) or more adjacent keys (i.e. 'qwerty', 'cvbnm')
- May not contain your User ID, first name, last name, or the inverse of your User ID
- May not contain common words found in passwords (i.e. 'password', 'admin')
- Cannot be the same as the previous 13 passwords

* Denotes required field

close