QUICK GUIDE FOR EDITING SPIA USERS

The management of a SPIA Entity's users is performed by the Entity's Administrator using the Entity's **Administrator User ID**. The SPIA Entity assigns the Administrator to the **Administrator User ID**.

This guide shows the screens and steps that an Administrator follows for editing, adding and deleting users.

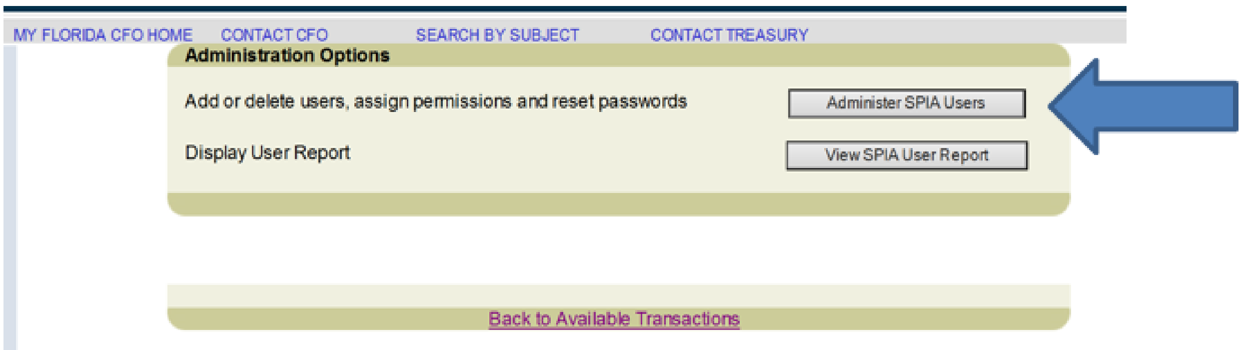
Editing Users

After logging in to SPIA, the below screen is accessed (**SCREEN #1**). Click the SPIA Administer Users button.

SCREEN #1

Click the Administer SPIA Users button (**SCREEN #2)**.

SCREEN #2



Select the user to edit in the Select user to administer dropdown menu and click the Edit User button **(SCREEN #3)**.

SCREEN #3

Each of the Entity's users (including the Administrator) should be edited to include Update Permission Type, First Name, Last Name, phone number and email address **(SCREEN #4)**.

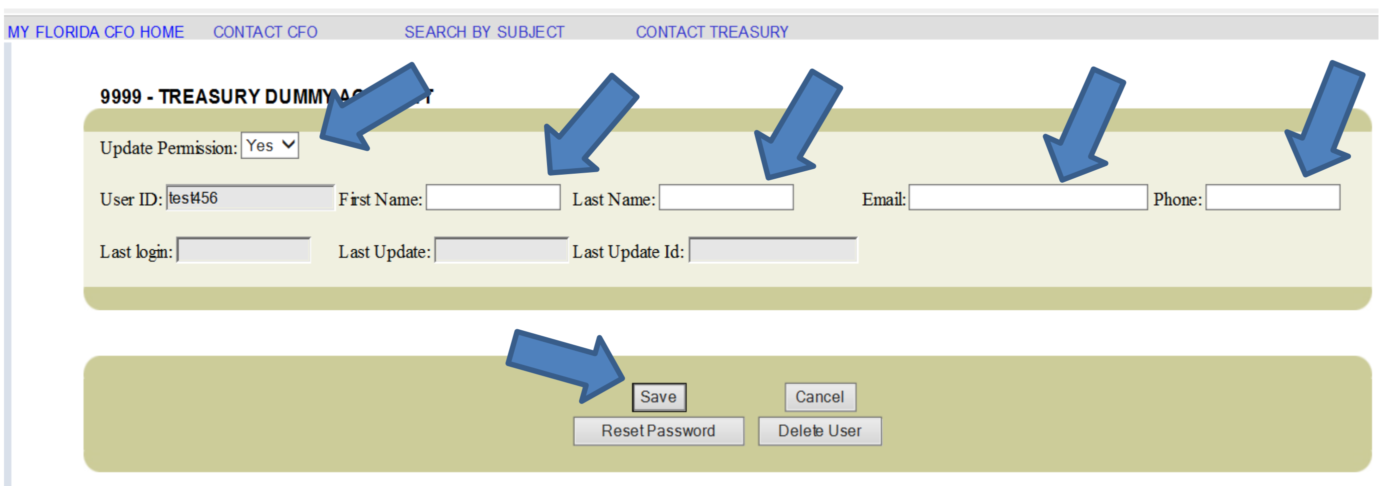
Update Permission type options are:

Yes (system default) - The user is able to enter transactions in the SPIA system and will be considered an **authorized user** for this account (Treasury staff will be able to receive verbal instructions from this user) or

No – The user will be able to view account statements but will not be able to enter transactions in the system or provide verbal instructions to Treasury Staff.

After the information has been entered, click the Save button.

SCREEN #4



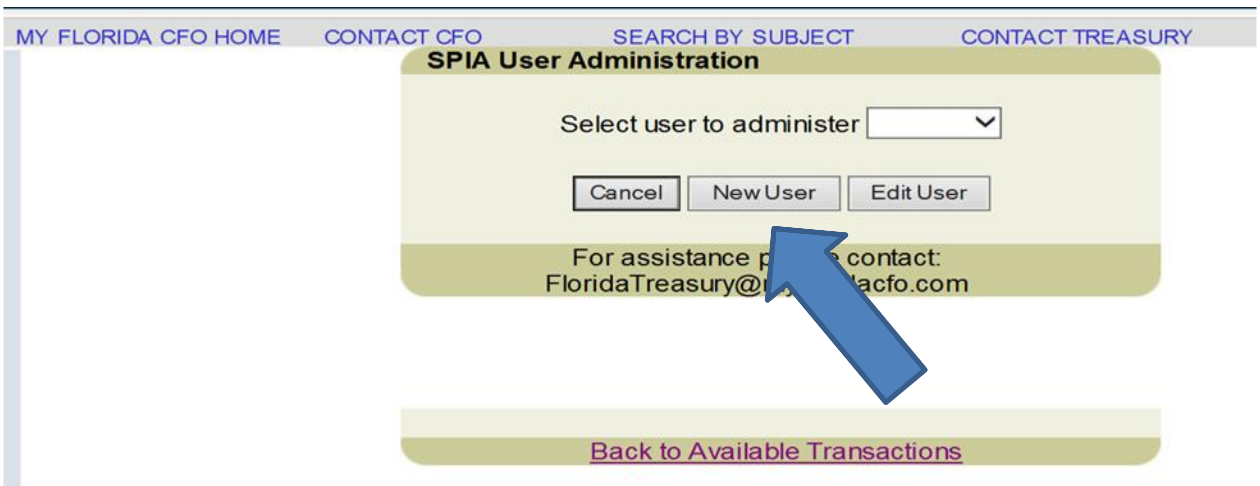
Authorized users are established in the SPIA system. Treasury Staff will use this information to determine if an individual has authority to provide verbal instructions and/or obtain information relating to the account. Therefore, it is important that all authorized users are established and maintained in a timely manner.

Add New Users

Follow the steps on **SCREEN #1 and SCREEN #2**

On **SCREEN #5**, click the New User button (while leaving blank the Select user to administer dropdown menu).

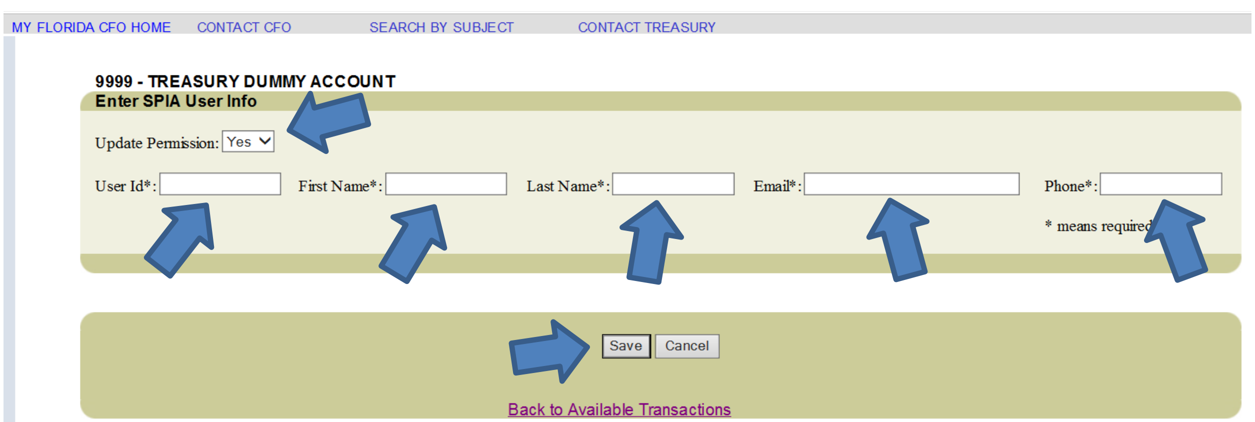
SCREEN #5



Select the appropriate Update Permission type, create a User ID and enter the user's First Name, Last Name, Email and Phone number **(SCREEN #6)**.

After all the required information has been entered, click the Save button **(SCREEN #6)**.

SCREEN #6



The system will generate a pop-up message with the new user initial password and a link for new user registration **(SCREEN #7)**. Copy this message to an email and send it to the new user for validation and password change.

SCREEN #7

Delete Users/Reset Password

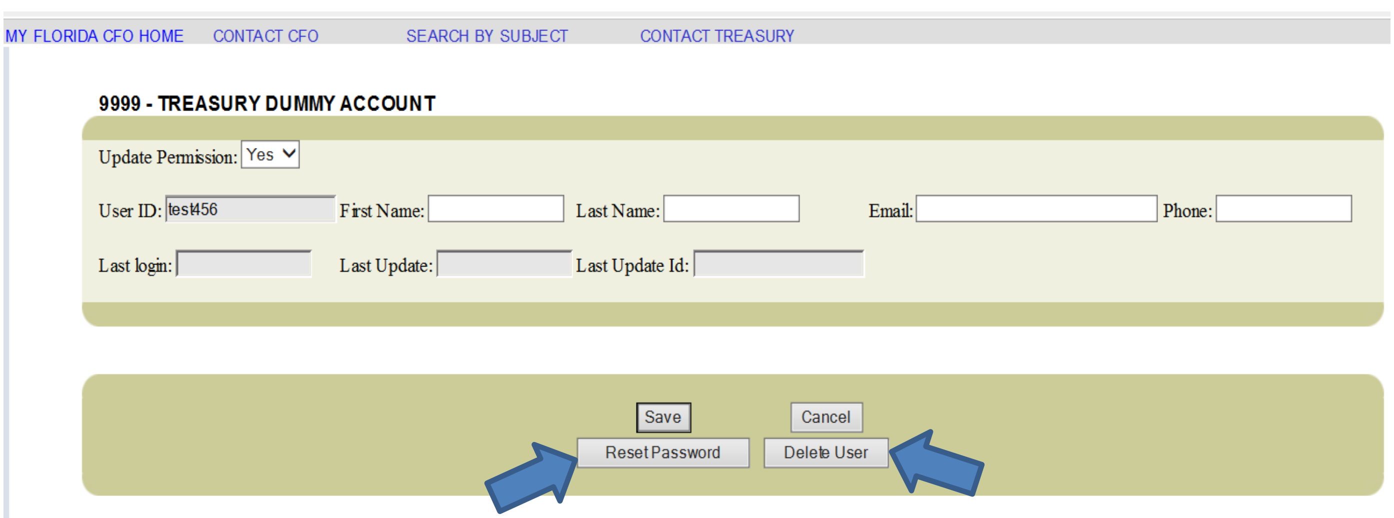
Follow the steps on **SCREEN #1 and SCREEN #2.**

Select the appropriate user (User ID) on the <u>Select user to administer</u> dropdown menu shown in **SCREEN #8** and then clicks the <u>Edit User</u> button.

SCREEN #8

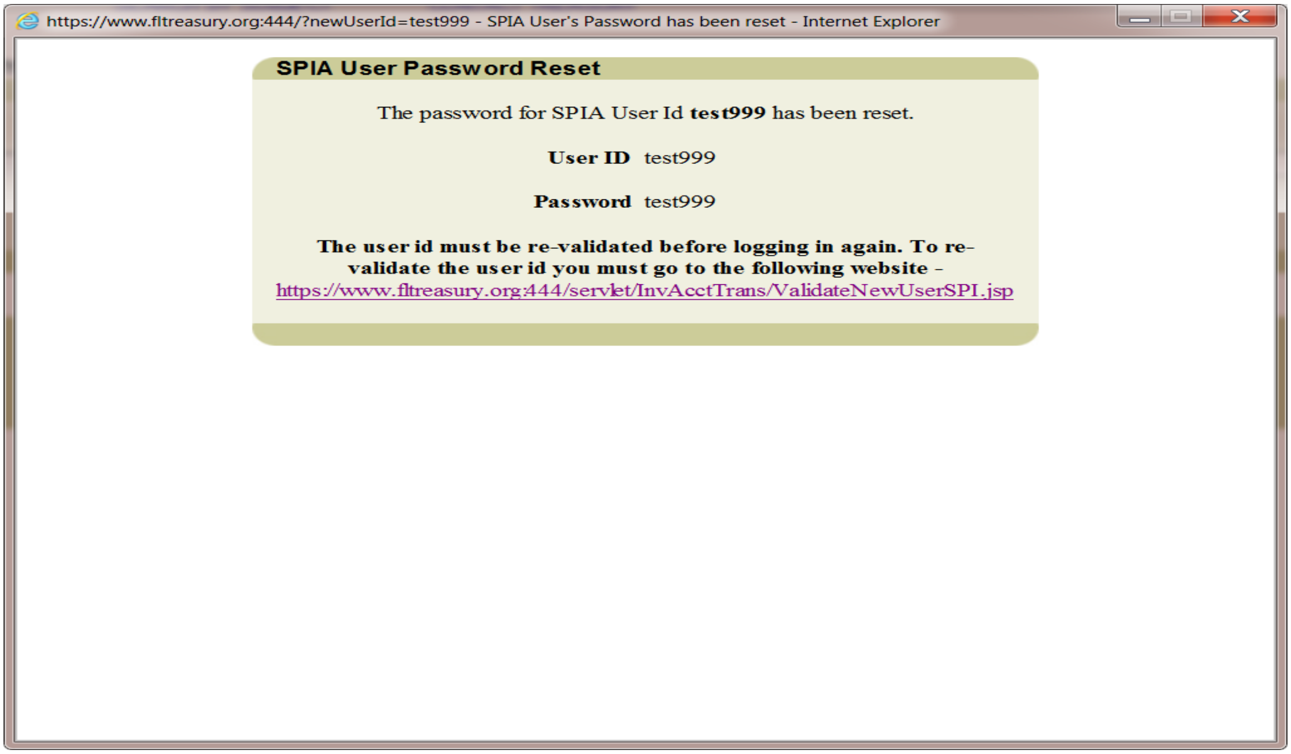
On **SCREEN #9** click the <u>Delete User</u> button to delete the user or <u>Reset Password</u> to reset a user's password.

SCREEN #9



When the Reset Password is selected, the system will generate a pop-up message with the default password and a link for user to re-validate the password change **(SCREEN #10)**. Copy this message to an email and send it to the user to complete the process.

SCREEN #10



Obtaining User Id reports

Click the View SPIA User Report button on **SCREEN #2** shown above.