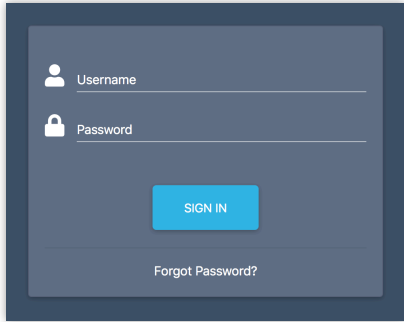




INTERACTIVE MODELS | USER MANAGEMENT

## Gaining Access to the FinPro Hub site

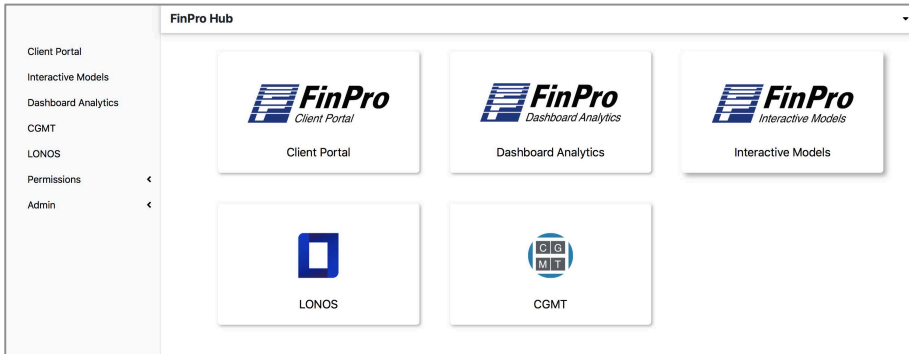
Before logging in, you will receive 2 separate emails containing your username and password, as well as a link for the site.



Click the link in the email or paste it into your browser. You will be brought to the SIGN IN page as shown to the left.

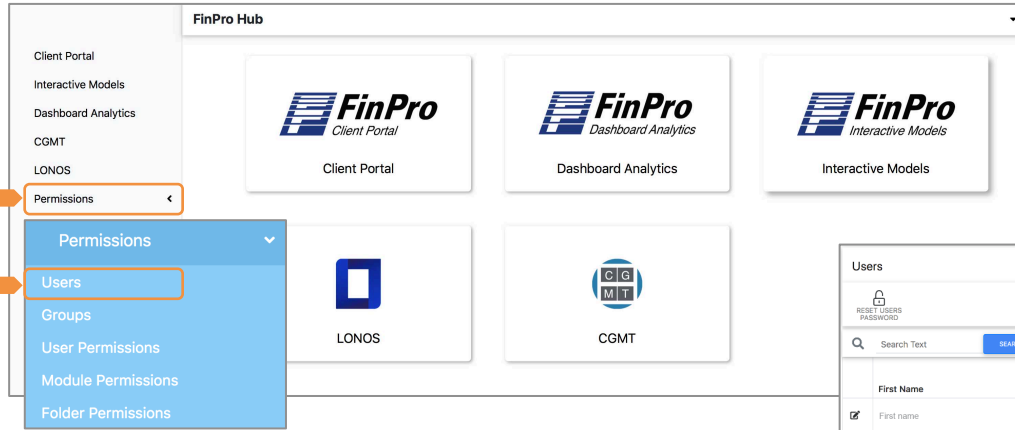
Enter your username and password assigned to you in the email and click SIGN IN.

You may receive a prompt for dual authentication. If so, an email will be sent with the one-time code. Please check your spam folder if you do not see it.

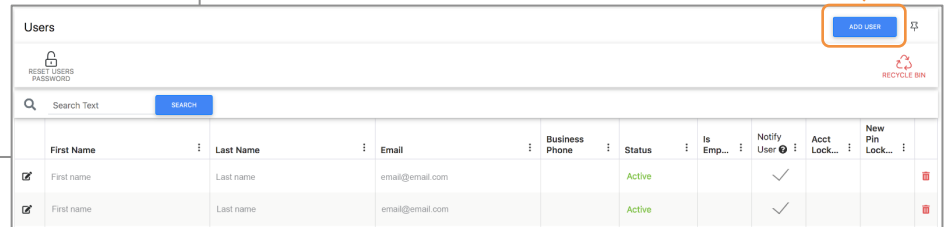



# FinPro Digital – Adding Users

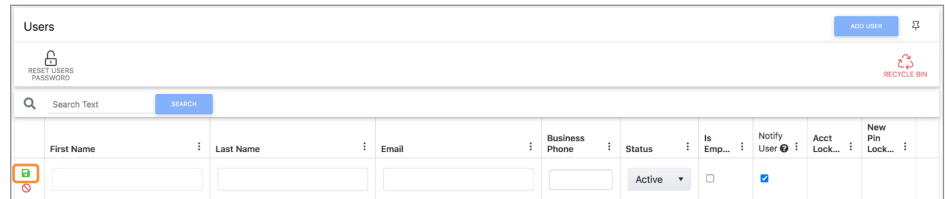
To add users and customize their permissions, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on **Users**.



The user window is where you can see all of your users as well as add a new user. To add a new user, click Add User.

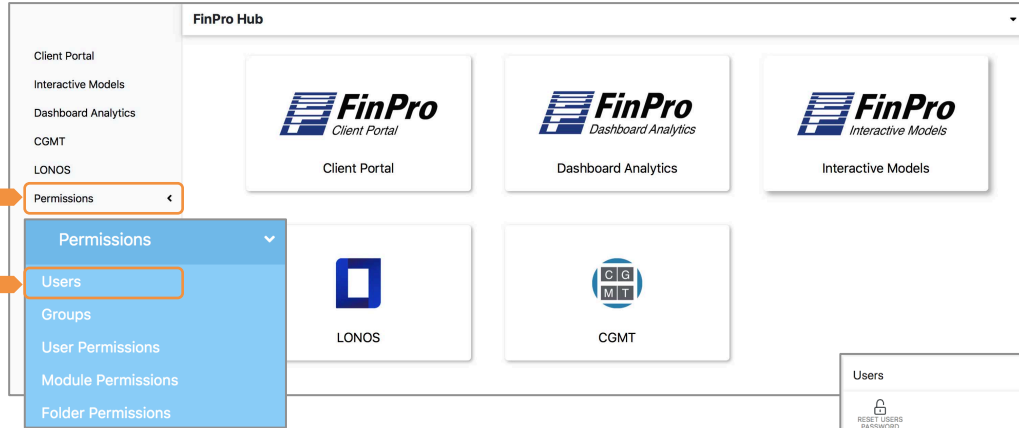



Add the first name, last name, email and phone number, and then select the save icon to save the new user. 

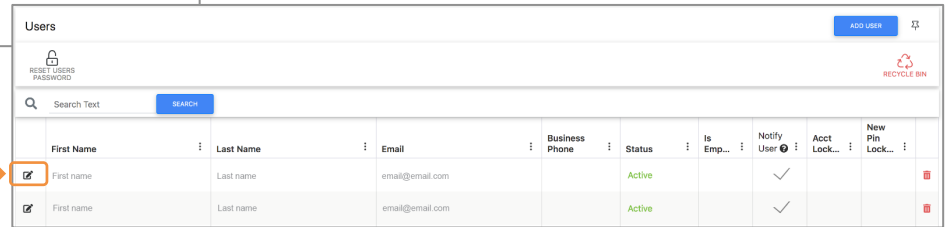



# FinPro Digital – Editing Users

To edit users and customize their permissions, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on **Users**.



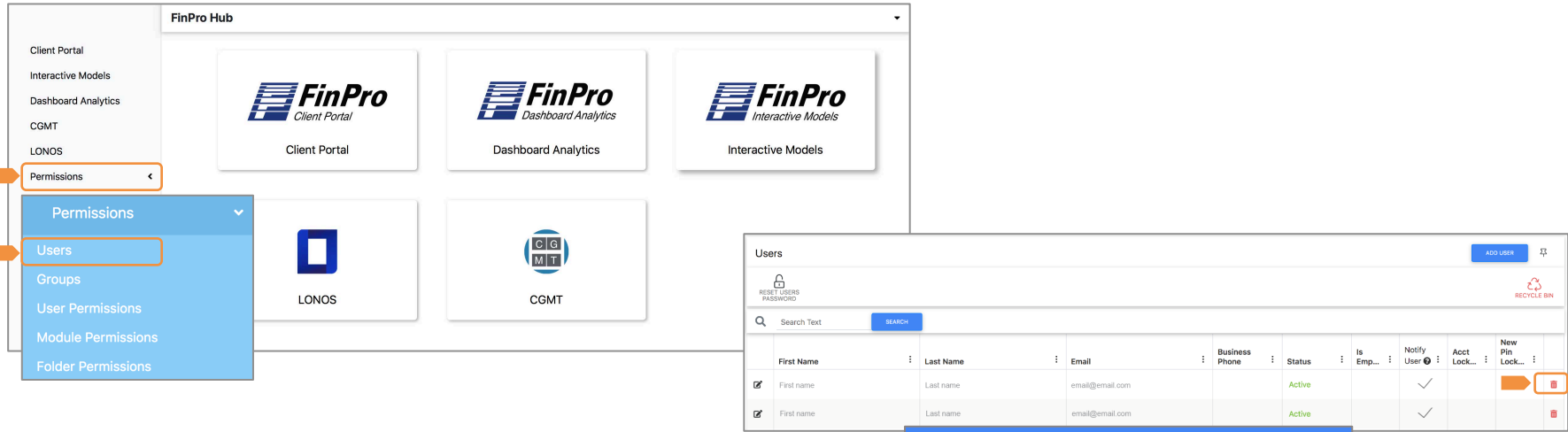
The user window is where you can see all of your users as well as add a new user. Click the  to edit user information.




You will now be able to change the users first name, last name, phone number etc. and then select  (save icon) to save changes.

# FinPro Digital –Removing Users

To remove users, go to the menu bar on the left of the FinPro Hub landing page and click on Permissions, then click on **Users**.



The user window is where you can see all of your users as well as add a new user. Click the  icon to remove a user account.

You will then be prompted to move the user to the recycle bin. This will remove all user access.

# FinPro Digital – Establishing Permission for Users

Once a user has been added to the site it is time to permission each user into their selected module. In the menu bar on the left, click on Permissions, then click on **User Permissions**.

The screenshot shows the FinPro Hub interface. On the left, a navigation menu is open, with 'Permissions' selected and 'User Permissions' highlighted. The main area displays five module cards: Client Portal, Dashboard Analytics, Interactive Models, LONOS, and CGMT. An orange arrow points from the 'User Permissions' menu item to the 'Select Groups' dialog box on the right. The dialog box has a table with the following content:

	Groups
<input checked="" type="checkbox"/>	Interactive Models
<input type="checkbox"/>	Lonos

At the bottom of the dialog, there are two buttons: 'SHOW SELECTED GROUPS' and 'SHOW ALL GROUPS'. An orange arrow points from the 'SHOW SELECTED GROUPS' button to the right.

The Select Group window will appear where you can see which modules are available to permission the user to have access to.

Select the modules you would like to permission users into and click **Show Selected Groups**.

# FinPro Digital – Establishing Permission for Users

Users can be located utilizing the Search bar or by selecting from the list below.

The screenshot displays the 'User Permissions' interface. On the left is a dark sidebar with navigation icons for Home, Documents, Process, Meetings, Alerts, Permissions, and Admin. The main content area has a title 'User Permissions' and two tabs: 'BY USER' and 'BY GROUP'. A green 'SAVE' button is in the top right. Below the tabs are icons for 'GROUPS FILTER', 'EXPORT CURRENT VIEW', and 'EXPORT FULL MATRIX'. A search bar with a magnifying glass icon and a blue 'SEARCH' button is present. Below the search bar is a table with the following data:

User Name	Permission Status
Kristin Kiefer	YES
Mark Lampariello	YES
Parag Paliwal	YES
Pat Rohan	YES
Rob Fehn	NO
Sam Maze	YES
Sample User	NO

A callout box on the right contains the following text:

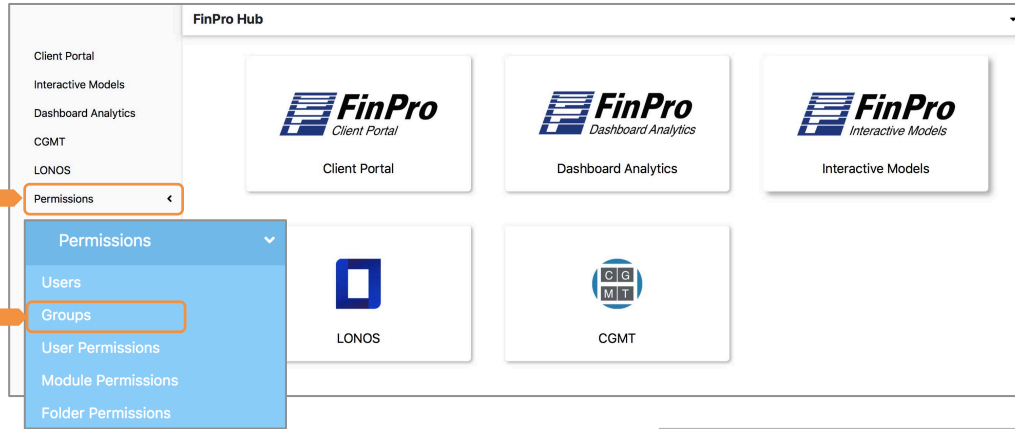
By default users will not have permission to the selected module.


To activate permissions click the button next to the user's name. Users will have permission once the icon next to their name says YES

Once user permission has been activated click on SAVE in the top right corner.

# FinPro Digital – Reviewing Permission for Users

To view a list of users who have been permissioned into the site, click on Permissions in the left menu bar, then click on **Groups**.



This will take you to the Groups Page. Click on the  icon to view a list of all users currently permissioned into the selected Module.

The screenshot shows the 'Groups' management page. At the top, there are filters for 'Has Users' and 'Has Permissions', and an 'ADD GROUP' button. Below the filters is a search bar with the text 'Search Text' and a 'SEARCH' button. The main content is a table with columns for 'Group Name', 'Legal Entity', 'Major Group', 'Minor Group', and 'Expiration'. The table contains two rows: 'Interactive Models' and 'Lonos'. The 'Interactive Models' row has a user icon highlighted with an orange arrow.

Group Name	Legal Entity	Major Group	Minor Group	Expiration
Interactive Models	Interactive Models			
Lonos	Lonos			