



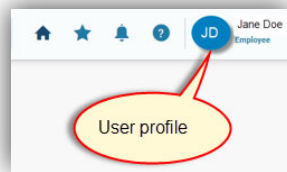
CGI ERP - Account Setting (Password and Business Role Preferences)

QUICK REFERENCE GUIDE

OVERVIEW

Account Settings allow users to view personal information, password management, modify preferences including business role display order.

Click anywhere within the *User Profile* area to access *Account Settings*, and the business roles assigned to each user. When selected, the *User Profile* information expands. Users can switch between assigned business roles and *Account Settings*.



PERSONAL INFORMATION

The **Personal Information** tab displays the user's name, email, and contact information. You must contact a site administrator to change any of this information.

PASSWORD MANAGEMENT

The **Password Management** tab allows you to change your Advantage password.

Enter the current password in the *Current Password* field and then enter the new password in the *New Password* and *Confirm Password* fields. Select **Save** to save the new password.

Password must be at least 8 characters long with at least 1 of the following: number, capital letter and a special symbol (i.e. \$, %, -. @)

A screenshot of the Password Management form. The "Password Management" tab is selected and highlighted with a red circle. The form contains three input fields: "Current Password", "New Password (Case Sensitive)", and "Confirm Password (Case Sensitive)".

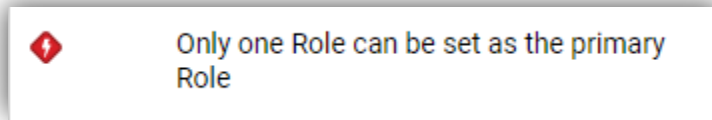
BUSINESS ROLE PREFERENCES

The **Business Roles Preferences** tab allows user to select your primary Business Role. Out of the Business Roles assigned, select from the drop-down value as Yes in the Primary field for the Business Role that you want to keep the default.



CGI Advantage allows only 1 primary business role at a time

The application will generate a warning if there are multiple roles with a Yes in the column.



Once selected, select *Save* to apply the changes.

The next time you login to the application, the selected Business Role will load as the default. You also have the flexibility to change the order of Business Roles.

Each business role has field display order field. Click on the box and assign a numeric value. This will be the basis of how business role will display from the *User Profile* area.

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| Business Role Name | Business Role Description | Primary | Display Order |
|--------------------------|--|--------------------------|--------------------------------|
| Accounts Payable | This business role contains all of accounts payable but stops with disbursement request management as disbursements and post disbursement activity is in the Treasury Management business role. This role does contain withholding and taxes. | <input type="checkbox"/> | <input type="text" value="0"/> |
| Accounts Receivable | This role contains all of accounts receivable but stops short of deposit management, which is in the Treasury Management business role. | No | 0 |
| Employee | Employee Role | Yes | 1 |
| Financial Administration | This role contains all of the configuration pages used in the establishment of transaction processing rules (short of workflow and security), accounting configuration, date configuration and many other pages thought of as General Accounting or even Admin | No | 2 |