

GABRIEL System – User Management Functionality - QRG

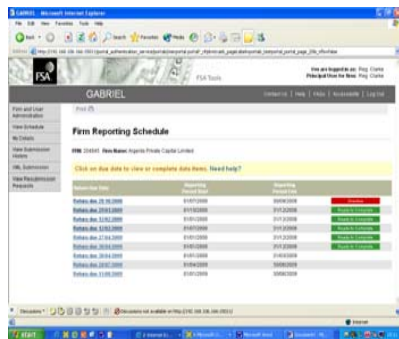


LOGGING ONTO GABRIEL

- Enter your login details [i.e. your username and password] to log in to GABRIEL. For first time users these will have been provided in an email automatically generated by GABRIEL when you were set up on the system.
- **NOTE:** After 3 failed attempts to log in, users will be locked out of GABRIEL and will need to contact their Principal User [or in the case of the Principal User, the FSA's Consumer Contact Centre] to have their account reset.



- On successful login you will immediately see your firm's reporting schedule – this is, the 'homepage'.
- **NOTE:** If you have access to more than one firm the first screen after login will contain a list of these firms. Click on the firm's name which will take you to that firm's homepage as well as providing you with other menu options.



SELECTING A DIFFERENT FIRM

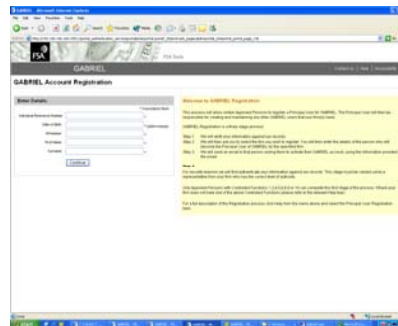
If you have access to more than one firm:

- Select the "Change Firm" menu option from the left hand menu bar.
- Select the firms name from the list displayed to display that firm's homepage (i.e. reporting schedule).

REGISTERING FIRMS CONTROL FUNCTION (CF)

NOTE: The Register here function can be accessed from the [New User](#) page on the GABRIEL website.

- CF accesses the Register here function.
- CF enters their details:
 - <<First Name>>
 - <<Surname>>
 - <<Individual FSA reference number>>
 - <<National Insurance Number>>
 - << Date of Birth>>



- Press "**Continue**"
- CF enters PU Details
 - <<First Name>>
 - <<Surname>>
 - <<Email Address>>

- Press "Register PU button"

ACCOUNT ACTIVATION (PRINCIPAL USER / FIRM USER)

- Click on the (activation) link in the activation email.

- Enter the username and password contained in the activation email and press "**Activate**". Activation security page is displayed.
- Enter a new password and answers to the three security questions.

Password & Security Answer Rules:

Passwords are case sensitive and for security reasons, they appear hidden on the screen as the user types. Passwords **MUST** contain at least one uppercase letter, one lowercase letter, one number and one non-alphanumeric (special) character which can be one of the following ! " £ \$ % ^ & * () - + @ # ~ ? < >

However, passwords **MUST NOT** contain the words "password", "administrator" or "nobody" nor include the user's First Name, Surname or Username.

Furthermore, the password should not be one of the 12 previous passwords used (including the temporary password in the activation email).

Security Answers are not case sensitive and must be between 6 and 30 characters in length. These also appear hidden on the screen as the user types.

- Press the "**Save**" button
- Click on "**View Schedule**" to view the firm's reporting schedule

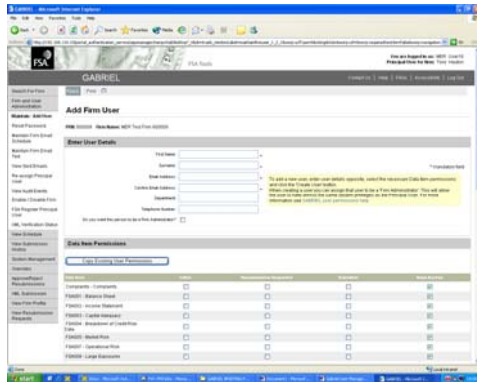
FIRM AND USER ADMINISTRATION

NOTE: The Firm and User Administration functionality of GABRIEL allows PU's to add, view or edit user details, reset Firm User (FU) passwords and re-assign the PU to another user.

ADD A NEW USER

- Select the "**Firm and User Administration**" followed by "**Maintain / Add User**" from the left hand menu bar.
- Press the "**Add User**" button and enter **User Details**.
- Assign **Data Item Permission** rights to the user (User is automatically assigned a Read Only permission).

- Press the "Create User" button.



- User will be sent an activation email containing a username and password.

VIEW A USER

- Select the "Firm and User Administration" followed by "Maintain / Add User" from the left hand menu bar.
- Select a user then press the "View User" button.

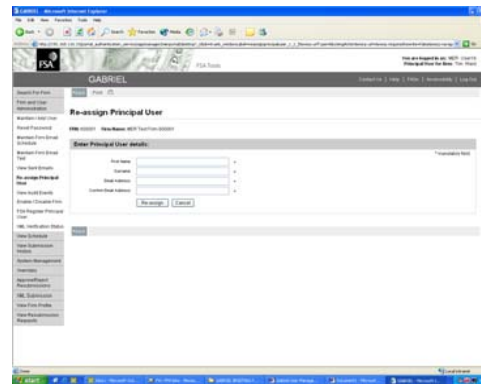
EDIT A USER

- Select the "Firm and User Administration" followed by "Maintain / Add User" from the left hand menu bar.
- Select a user then press the "Edit User" button.
- Review and amend Update Details and Data Item Permission where necessary.
- Press the "Save" button.
- User will be sent an email notifying them of the changes.

REASSIGN PRINCIPAL USER

- Select "Firm and User Administration" followed by "Re-assign Principal User" from the left hand menu bar.
- Confirmation will be displayed showing the existing PU details.
- Press "Re-assign".
- To re-assign to an existing firm user:
 - Select user from list then press "Re-assign".
- To re-assign to new user:

- Press "Add New User". A screen requiring the new users details is displayed.



- Enter users First Name, Surname and Email Address, then press "Re-assign".
- Confirmation page will be displayed, press "Yes" to confirm details.
- In both cases, the new PU will be sent an email confirming they have been assigned as the PU for the firm (a new user to the system will be sent an activation email containing a username and password).

FORGOTTEN PASSWORD (PRINCIPAL USER / FIRM USER)

- Click on the "Forgotten Password" button on the login page.
- Enter "Username" and click on "Continue".
- Answer security question(s) and click on "Reset Password" button (the number of security questions asked will depend on whether the user is a Principal User (2 security questions) or a Firm User (1 security question)).
- User will be sent an activation email containing their username and password.
- Please follow Account Activation (see above).
- NOTE: If user is cannot remember his/her security answers, they should follow the 'Reset Password' instructions (see below).

RESET PASSWORD

To reset a firm user password:

- Select the "Firm and User Administration" option followed by the "Maintain / Add User" option from the left hand menu bar.
- Select "Reset Password" followed by either "Reset Principal User Password" or "Reset Firm User Password"
- Select user from list then press "Reset Password"

NOTE: In the case of the PU, please contact the Customer Contact Centre to reset password.

NOTE: The Customer Contact Centre is unable to reset FU passwords.

MY DETAILS

The "My Details" functionality of GABRIEL allows users to:

- View and/or Change personal details
- Change their password

VIEW / CHANGE PERSONAL DETAILS

- Select the "My Details" option followed by "View / Change Personal Details" from the left hand menu bar.
- From here the user can.
 - Update their personal details and security answers.
 - View their **List of Associated Firms**.
 - View their **Data Item Permissions**. (Please note that the **Data Item Permissions** revert to the first firm listed in **List of Associated Firms** and cannot be edited from this screen – this can only be edited by the PU as mentioned above).
- To view **Data Item Permissions** of another associated firm, click on appropriate **Firm Name** in **List of Associated Firms**.
- To update personal details, edit the appropriate fields and then press "Save".

CHANGE PASSWORD

- Select "**My Details**" followed by "**Change Password**" from the left hand menu bar.
- Enter "Old Password" then "New Password" twice
- Press "**Save**"
- Message will be displayed to confirm the password has been changed and to use the new password for subsequent login.

NOTE: See Password & Security Answer Rules above