# InfoSystems Integrated
SOLUTIONS FOR FINANCIAL SERVICES FIRMS

*SDS Portal Administration Menus*

## User Management

| Function | Description |
|---|---|
| Add User | Create the login name and password for a new user.  Set username,  security level, and email. |
| List Users | View all users and choose a specific user to edit. |
| Find User | Search the User Name or Login Name fields to locate a user for editing. |
| Find Portfolio | Search by Account or Family code.  Returns users related to a specific Axys code (cli/grp). |

## File Manager

| Function | Description |
|---|---|
| Manage Public Files | List Help Files.  Add or delete Help Files. |
| List Deleted Files | Select this function to list all deleted files. |
| Clean-Up Axys client/group files | Deletes all old clients and adds new clients for all Axys data effectively synchronizing modified group data in Axys with the SDS. |
| Import All | Automatically processes the replacement of all investment reports created by Encore for the latest reporting period. |
| Import Updated Files | Automatically processes one or more modified investment reports. |
| Backup File Information | Advanced Feature: Creates a restore point for existing file information. |
| Restore File Information | Advanced Feature: Reverts back to previously stored file information to negate unwanted changes. |
| Load Accounting Reports | Advance Feature: Allows direct upload and review of investment report file information. |
| Load Axys/APX Relationships | Advanced Feature: Rebuild list of client account codes (.cli) and family group codes (.grp) employed when editing user account information. |

08/08/2010

| System Management | |
| --- | --- |
| **Function** | **Description** |
| Edit Login Message | Manage the Log-In Message seen by all users when viewing the investment reports page. |
| View Log-in Activity | Select this function to view login attempts. Erroneous passwords are listed for quick review. |
| View Event Log | An advanced tool for monitoring usage of the system. Events are tracked by time and user. |