What You Need To Know
About The New HBAA Website

This user guide is designed to give you a brief instruction on everything that you as a main contact need to know to get your company users and profile information setup on the new and improved HBAA website.

If you have any questions please feel free to contact the Secretariat. Alternatively the new website has an FAQs page or you can download a .Pdf version of the contents of this guide from the website here.

Creating New Users

New users can be created as follows

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. In the grey area on the left of the page, you should see a list of all users associated with your company, beneath these users should be an Add New User button.
4. Click this button to procceed to the Create New User screen.
5. Enter the users details in the text boxes provided. Remember that the username of this new user must be their email address.
6. Choose one of the three initial permission groups. More information about permission groups can be found in the FAQs section of the site and also below. Custom permissions can only be set for a user once they have been created.
7. Once you are happy that all of the correct details have been entered click Add User.

Editing User Profiles

All aspects of your profile can be edited including contact information, profile photo, permission group and password. You can edit your profile information as follows.

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. Click the Edit Profile button under your profile photo.
4. Make any changes needed and click the appropriate Update button.

You can edit another users profile information as follows

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. In the grey area on the left of the page, you should see a list of all users associated with your company. Click the user whose profile that you wish to edit
4. Click the Edit Profile button under their profile photo.
5. Make any changes needed and click the appropriate Update button.

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Editing User Permissions

The new HBAA site incorporates improved functionality for all users based on their permissions. As the main contact for your organisation we have given you the ability to delegate your available functionality to other users associated with your company.

As mentioned above, when creating a new user you must choose one of the three initial permission groups available. These three groups are Main Contact, HR and Staff and all have associated permissions. A fourth group available once a user has been created is Custom. This permission group allows you to delegate which of the functionality available to yourself you wish to enable or disable for the user you are editing. View functions available to each permission group by clicking on the help icon on the 'Update Profile' page. You can edit a users permissions as follows:

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. In the grey area on the left of the page, you should see a list of all users associated with your company. Click the user whose permissions that you wish to edit
4. Click the Edit Profile button under their profile photo.
5. The users current permissions group is shown under the heading Current Permissions.
6. To change this group select a new one from the dropdown menu below this and click the Update Permissions button.
7. The page that appears now lists the available functionality. If you have selected anything but a Custom group you can click Update permissions. If you have selected Custom then you can tick the required functionality that you wish to enable and click Update Permissions.
8. Please note that if you have previously given a user Custom permissions, you can review the selected functionality by selecting Custom again at Step 6 and selecting Update Permissions

Editing your Company Profile

All aspects of your company information can be edited. Your company profile is used to populate booking forms and listings accross the site. You can edit your company profile as follows

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. Click the Edit Company button under your profile photo.
4. Make any changes needed and click Update
    - Particulars areas to note in the Company Profile screen
    - Profile - This text editor allows you to create a stylised high impact description of your company for listing in our Agency Finder.
    - Service Classification - Choose your service classification to be included in our Agency Finder search listings

Editing your Company Logo

You can edit your company logo as follows

1. Login to the site using your login details.
2. Click on the Profile link in the user specific area of the navigation bar (this is the blue area of the navigation bar. In addition to the Profile link, you should also see Basket and Status).
3. Click the Edit Company button under your profile photo.
4. Scroll to the bottom of the Edit Company Profile page and click Upload Logo
5. Browse to the logo that you wish to upload and click the Upload button. Please note that your logo will be resized automatically while uploading.

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