This resource guides the **Company Administrator** through the process of registering a New User within their company to the Compass Portal.

## How to Add a New Compass User

This process facilitates a New User to gain access to the Compass Portal. <u>Note</u>: a company and an Administrator must already be registered with University Lands to be able to register a **new** user. If an Administrator is not yet registered, please see the "How to Register a New Compass User" guide.

The Company Administrator logs in and follows these guidelines to Add a New Compass User:

 From the Landing Page, navigate to the "Security Management" Page by clicking the "Navigation" button on the left-hand side of the screen and select "Profile Management" > "Security Management."

|  | VERSITY LANDS                    |                   | Log Off  |
|--|----------------------------------|-------------------|--|
| C A THE                                      | UNIVERSITY of TEXAS SYSTEM       |                   | Welcomet.  |
| Reporting  Reports & Queries                 | Enter UT1 and UT2                | Enter UT3         | Notifications  Account Balance (Jan 2014 Production Forward)               |
| Profile Management  User Profile             | Production & Royalty Receivables | Reports & Queries | Incomplete UT1 and UT2     Find  |
| Security Management Address Management Links | Training & Docu                  | mentation         | Missing UT1 and UT2 Find     Unmatched Payment Find     Unmatched UT3 Find |
| u  | L News                           |                   |  |
|  |                                  |                   |  |
|  |                                  |                   |  |

2. Press "Add."

| User Details       Address Details         User Details       Click to Add a new user         Add       Edit         User Id       Roles         Title       Name         Email       Phone         Fax       Portal Access         Created At       Created B         V       V       V       V   | Compass University Lands<br>The University of Texas System |                          |                    |              |             |          |       |          |               |            |                   |
|--|--|--------------------------|--------------------|--------------|-------------|----------|-------|----------|---------------|------------|-------------------|
| User Details       Click to Add a new user         Add       Edit         User Id       Roles         Title       Name         Email       Phone         Fax       Portal Access         Created At       Created At         V       V       V       V   | l  | User Details             | Ado                | iress Detail | 5           |          |       |          |               |            |                   |
| User 1d         Roles         Title         Name         Email         Phone         Fax         Portal Access         Created At         Created At           V | Us   | er Details Click<br>a ne | k to Add<br>w user |              |             |          |       |          |               |            |                   |
|  |  | User Id                  | Roles              | Title        | Name        | Email    | Phone | Fax      | Portal Access | Created At | Created By        |
|  |  | $\nabla$                 | V                  | $\nabla$     | V           | $\nabla$ | V     | $\nabla$ | $\nabla$      | $\nabla$   | V                 |
| 1 usermaster Administrator User Master Active 3/24/2014  | 1  | usermaster               | Administrator      |              | User Master | 1000     |       |          | Active        | 3/24/2014  | the second second |

- 3. When the pop-up appears, the Administrator enters the User Details as specified in the e-mail received by the Administrator. Check a "Role" box to designate their Compass Security privileges and check the "Active" box to designate them as an Active Compass user. Note: the fields "User Id" and "Email" are required. The user will be able to add/edit their User Details once they login. Press "Save."
  - User IDs must meet the following criteria:
    - i. Have a minimum of six characters, maximum of 15 characters
    - ii. At least one lower or upper case letter
    - iii. Special characters are not accepted

|           | User Details  |
|-----------|---|
| User Name |   |
| User Id   |   |
| Phone     |   |
| Fax       |   |
| Email     |   |
| Role      | UT1/2 Reporter UT3 Reporter Supervisor Security Manager Administrator |
| Active    |   |
|           | Save Cancel   |

4. The **New User** receives an e-mail containing a link to set-up their Compass Portal login Password. Click the link embedded in the e-mail to initiate this process.

| From: < <u>compass-TRAIN@utsystem edu</u> ><br>Date: May 16, 2014 at 1:39:41 PM CDT<br>To: < <u>ily@opportune.com</u> ><br>Subject: ULands password<br>A User ID has been assigned to you for access to the Compass portal:<br>questions, contact Leslie Smith at <u>Ismith@utsystem.edu</u> or 432-686-47 | This is your<br>Compass<br>User ID to<br>login<br>JemnLy. To complete registration and create a pass<br>22. | Click the link<br>to create a<br>Password<br>word, please click here: <u>Compass Password Setup</u> . If you have any issues or |
|--|---|---|
| Regards,<br>University Lands   |   |   |

- 5. The link directs the **New User** to a Compass Portal page to create a Password. The New User enters his new Password in the "Password" field and re-enters the Password in the "Retype Password" field. Click "Save."
  - Passwords must meet the following criteria:
    - i. Have a minimum of eight characters
      - ii. At least three characters must be numbers.
      - iii. At least one character must be a lower or upper case letter.
  - Note: the New User is restricted from accessing Compass if the Password is incorrectly entered five times.

|           | c <del>¥</del> mpass | UNIVERSITY LANDS<br>THE UNIVERSITY ♂ TEXAS SYSTEM |
|-----------|----------------------|---|
| z         | Create Passsword     |   |
| avigation | Password             |   |
|           | Retype Password      |   |
|           |                      | Save  |
|           |                      |   |

6. Upon pressing "Save," if the new Password meets the Password Credentials, the New User is redirected to the Compass Portal Landing Page.

| Wekome!   | Log Off<br>CETTIPASS UNIVERSITY LANDS<br>THE UNIVERSITY & TEXAS SYSTEM |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
| Enter UT1 and UT2 Enter UT3 • Account Balance                         | (Jan 2014 Production Forward)  |  |  |  |  |  |  |
| Production & Royalty Receivables Reports & Queries • Incomplete UT1 a | and UT2 Find   |  |  |  |  |  |  |
| Missing UT1 and     Unmatched Paym     Unmatched UT3 I                | UT2 Find<br>hent Find  |  |  |  |  |  |  |
| UL News   |  |  |  |  |  |  |  |

7. The New User can change his Password once logged into the Compass Portal. From the Compass Portal Landing Page, click the "Navigation" button on the left-hand side of the screen and select "Profile Management," then "User Profile."

| Na                  | Reporting                | • |  |
|---------------------|--------------------------|---|--|
| vigat               | Reports & Queries        | - |  |
| ion                 | Training & Documentation | - |  |
|                     | Profile Management       | • |  |
| <u>User Profile</u> |                          |   |  |
|                     | Security Management      |   |  |
| Address Management  |                          |   |  |
|                     | Links                    | - |  |

8. Enter a new Password in the "New Password" field and re-enter the same Password in the "Confirm New Password" field. The Password must meet the Password Credentials listed in step 5. Press the "Save Changes" button on the top right-hand side of the screen.

| c 🔆 n                                | npass Universi<br>THE UNIVE | <b>ITY LANDS</b><br>RRSITY <del>of</del> TEXAS SYSTEM | 3. Save the Welcomet User Z, Company Z<br>hew password<br>by pressing<br>this button Save Changes |
|--------------------------------------|-----------------------------|---|---|
| avigation                            | Company Information         |   |   |
| Ĩ                                    | Company Name<br>Company Z   | Company Number<br>00000011136                         |   |
|                                      | User Profile                |   |   |
| 1. Enter your<br>new Passwor<br>here | d                           | Title Fax Number Confirm New Password                 | 2. Confirm<br>your new<br>Password  |

9. From this point forward, this is the user's Password to login.