

## AB-TERMINAL-LINK version 1.0 : Agent banking terminal linking.

### INTRODUCTION

This application is designed to provide a means through which agent banking terminals can be linked to desired finacle accounts from a front end interface. It is aimed at carrying out initial validation and enforces a maker-checker routine to reduce risk involved in having the wrong elements linked to each other. The application also provides user management features based on a tiered structure of user privilege. This version contains 4 user levels that will be highlighted further below.

### BASICS

#### System core:

The 3 primary functions of the application are to allow users check if terminals and accounts exist and are linked in the system, submit new terminals for approval and then have these terminals approved.

#### First time login:

Upon first time access to the system, users will be required to login with their valid AD credentials. This will send their credentials to the users with higher privilege to approve. Originators can be activated by an approver from their indicated branch or any super-user. Approvers can only be activated by super-users.

## AB-TERMINAL-LINK V1.0

\*(New: Agent Banking terminal linking)\*

Username:

Password:

NEW USER DETECTED. PROVIDE DATA BELOW

Username:

First Name:

Last Name:

Branch:

User Role:

The above first time login described applies to only originators and branch approvers. Super-user access cannot be acquired this way and must be set up by an I.T. admin.

#### General Features:

All user levels in the system will have access to the buttons below upon login

INSERT DATA:

**CHECK TERMINAL:** Will check the system for any instances of the provided agent terminal ID and provide feedback.

INSERT DATA:

Terminal 23020441 exists in system and is linked to account 9030011081834: ARTEL COMMUNICATIONS

Terminal 23020390 exists in system and is linked to account 9030015699336: THE OVERCOMERS CO-OP SAVINGS AND CREDI

Terminal 230207145 is not linked to any account

**CHECK ACCOUNT:** Will check the system for any instances of the provided account number and provide feedback.

Account 9030015668228 is in system and linked to terminal 21020148

Account 9030015589255 is in system and linked to terminals ||23020656||23020659|

**MORE and LESS:** Will allow multiple entries to be submitted for feedback

**CLEAR:** Will remove current feedback on display and reset layout

Note\*\* It is advised that you check both the agent terminal and account to be linked here before either submitting an account for approval or approving one.

All users will also have a logout button that will end your session.

| Admin || HEAD OFFICE ||

Users can also access the user guide

## AB-TERMINAL-LINK V1.0

\*(New: Agent Banking terminal linking || **User Guide**)\*

INSERT DATA:

## USER ROLES

V1.0 launches with 4 system user roles. All users are limited to a single role.

### **Originator:**

The role responsible for submitting the terminal linking requests. This role can be signed up for by any user and will be branch restricted (the user must select a branch). This will determine the approvers that can action submitted terminals from this user.

Terminal requests from an originator can be actioned by 2 types of users; Approvers who belong to the same branch as the originator or any user at super-user level.

Originators can request a reprofile of their branch and current access level (limited to authoriser and originator); this sends the user profile for the normal approvals. Once actioned, the new rights are enabled. They can also view all their previous terminal-link submissions

### **Approver (branch approver):**

These users are expected to be leaders at the branch level that will authorise terminal link requests for the originators in their branch. The role is branch-restricted and can only be granted by super-users.

Approvers can view and action the pending terminal link requests for their respective branch as well as approve originators requested for that branch. They are also able to request a change in access level and branch, subject to the same approvals as mentioned above for the originator.

### **Super-user:**

Users at this level largely carry out the approver role, with the exception that they are not branch restricted. Super-users will be able to approve all users and action all agent-terminal link requests. These are expected to be the core leaders of the agent banking project. This role cannot be requested at login and super-users are not given the front-end ability to request system reprofile. Users at this level must be set up by an I.T admin and any change to this profile is expected to go through the same channel.

### **Admin (IT. admin):**

This group primarily exists to manage user access to the system and perform maintenance where required. User access for super-users and admins is actioned through the admin interface.

## USER MANAGEMENT:

### **First time access (Originators and Approvers):**

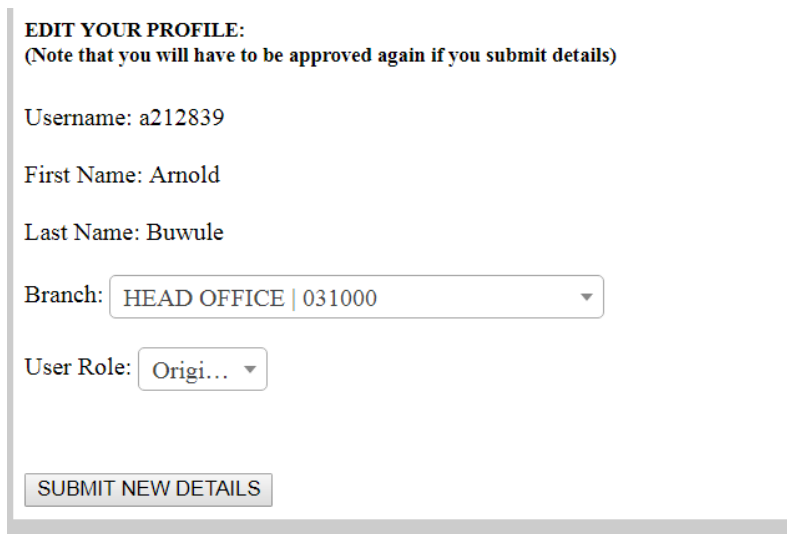
First time login is covered on page 1.

### **Profile change (Originators and Approvers):**

If for any reason, a user requires a change in branch or access level, this can be accessed through the profile button

| [HEAD OFFICE](#) [PROFILE](#) [LOGOUT](#)

This opens up the Profile edit interface, through which a new branch and role can be selected.



**EDIT YOUR PROFILE:**  
(Note that you will have to be approved again if you submit details)

Username: a212839

First Name: Arnold

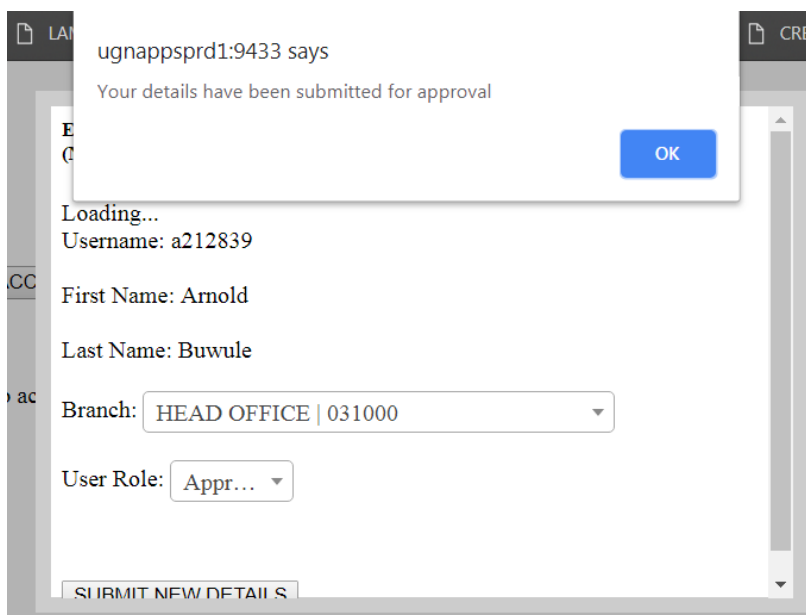
Last Name: Buwule

Branch: HEAD OFFICE | 031000

User Role: Origin...

SUBMIT NEW DETAILS

Upon submission, a prompt will be provided and the user will be immediately logged out of the system, pending the required approvals



ugnappsprd1:9433 says  
Your details have been submitted for approval

OK

Loading...

Username: a212839

First Name: Arnold

Last Name: Buwule

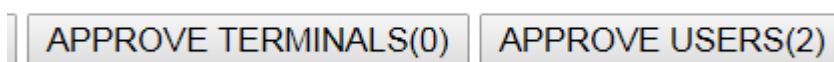
Branch: HEAD OFFICE | 031000

User Role: Appr...

SUBMIT NEW DETAILS

#### User Approval (approvers and super-users):

The above action will increase the number counter that indicates there are pending users waiting to be approved



APPROVE TERMINALS(0) APPROVE USERS(2)

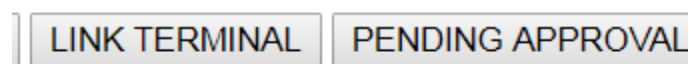
This button launches the User approval interface, through which user access requests can be accepted or rejected. A rejected user must reapply for user access

Pending User approvals:			
Names	Branch	Role	Action
Joy Namugenyi	HEAD OFFICE	Originator	APPROVE    REJECT

## TERMINAL LINKING:

### Submitting terminal for linking (originators):

Use the LINK TERMINAL button to launch the data submission interface and provide required data



Please note:

- all fields are compulsory
- mobile number needs to be in valid format (eg. 0782142561 or 0703875694)
- account number must be a valid and active finacle account

INSERT DATA FOR TERMINAL BELOW:

AgentID: 12345

Account Number: 9030015695012

Contact Number: 0777783333

Branch: HEAD OFFICE | 031000

Date joined: 2019-03-03

Agent Name: TEST1

SUBMIT DATA

Loading...

Terminal 12345 has been submitted for approval

OK

### Terminal approval (approver and super-user):

Use the APPROVE TERMINALS button to access the interface where you can approve or reject terminal approvals

SUBMITTED TERMINALS:

Pending Approval:

TerminalID	Account Number	Submitted by	Agent Branch	Date submitted	Action
12345	9030015695012	Buwule Arnold	HEAD OFFICE	2019-03-03	APPROVE    REJECT

Note that you will be required to supply a comment before either action

MS HTTPS

CIMSINSRTNEW

LAM

CRB-new

Travel Management

SUBMITTED TERMINALS:

Pending Approval:

TerminalID	Account Number	Submitted by	Agent Branch	Date submitted	Action
12345	9030015695012	Buwule Arnold	HEAD OFFICE	2019-03-03	APPROVE    REJECT

ugnappsprd1:9433 says

Please provide your comment to complete

Approved

OK

Cancel

SUBMITTED TERMINALS:

Terminal 12345 approved

Pending Approval:

TerminalID	Account Number	Submitted by	User Branch	Agent Branch	Date submitted	Action
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Originators will have a view for terminals pending approval and even after these are actioned

SUBMITTED TERMINALS:

Pending Approval:

TerminalID	Account Number	Date submitted
12345	9030015695012	2019-03-03

## COMMON SYSTEM RESPONSES:

Below are some common system responses and what they mean:

This user has not yet been approved

Username: a212839

Password: .....

LOGIN

Your account is pending approval. If you are an originator, your branch approvers can action or any super-user. For approvers, super-users will need to action to activate the account

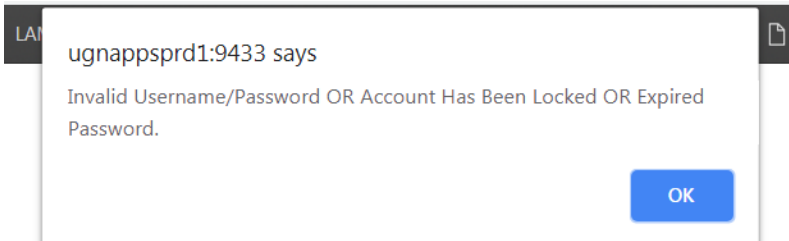
This username is no longer active

Username: a212839

Password: .....

LOGIN

Your account has been deactivated, likely due to a request from management or due to a long period of inactivity on the system. Escalate to I.T to have the account reactivated



Your username and password combination has failed. This system uses existing and active NT credentials so it could display the above for 3 main reasons; Your username is incorrect; the password is incorrect or the password has expired. Confirm the 3 above and if the problem persists, escalate to I.T. to check your NT credentials

Happy Linking - A