

**Multi Service Platform:
User Management
User Manual**

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Document Information

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1 Document Overview

1.1 Version Control

This document is updated continuously. Major modifications on content or size will lead to new release numbers, whereas textual revisions are reflected as new level numbers. The following list shows the document's history.

Version	Date	Author	Reason of modification
V 1.0	2015-09-22	Heike Layyous	GUI Description of the User Management for ABN AMRO

1.2 Objective

The User Management is part of the Multiservice Platform back office that will be used by Merchants, Acquirer, Banks and Operators. It manages the User data, their (group) permissions and roles.

This document describes the graphical web user interface for the User Management of the Worldline Multi Service Platform adapted for ABN AMRO Bank. It provides information about the system requirements to run the application, how to start it and how to navigate through the user interface dialogs. The meaning of all navigational, input and display elements will be explained. The descriptions are completed by a number of illustrations showing the "real" user interface GUI screens.

The user management module of the MSP consists of Tapestry client and presentation logic and bundle of Tapestry templates, which represent the GUI layer.

1.3 Monitoring and Enforcement

The author of this document is responsible to verify regularly the classification, actuality and adequacy of the document.

The responsible department is also responsible to inform all managers of the units this document is valid for about validity and where applicable about changes of document. After approval and publication of this document the line managers are accountable to implement and to control the compliance with this document.

2 Introduction

After a short overview the document details out the general mask layout and all system functionalities of the User Management GUI as part of the Worldline Multi Service Platform.

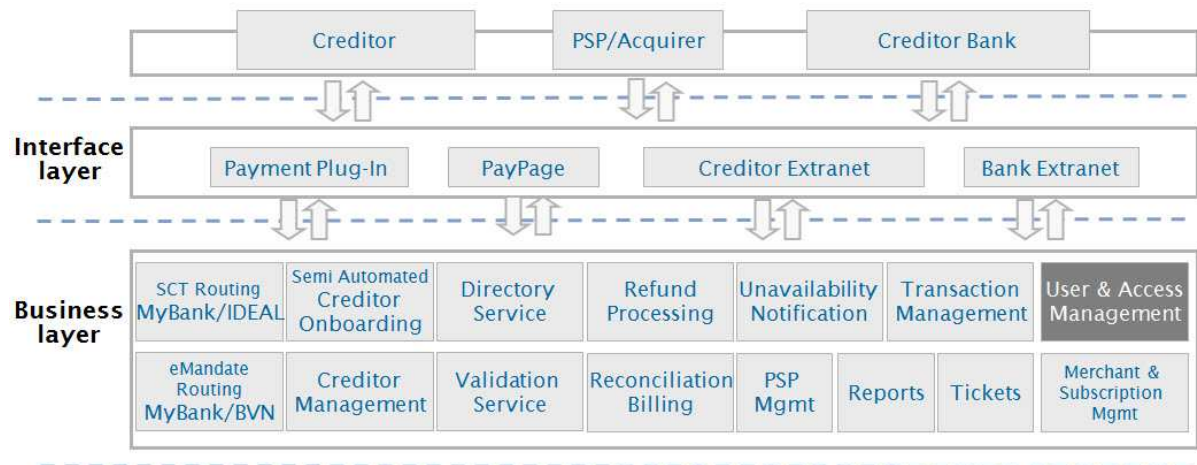


Illustration 1: Overview Worldline Multi Service Platform

The illustration above provides an overview of the Worldline Multi Service Platform.

The Worldline Multi Service Platform is a totally white labeled solution which is easy to integrate in the bank processes. The architecture is modular and easy to modify.

It provides multi service capability to manage different Routing Services like iDEAL, MyBank SCT, MyBank eMandate, BVN eMandate. The management and setup process is highly automated and for payments within Euro it is SEPA ready.

The Worldline Multi Service Platform provides a generic reporting functionality and gives maximum support for all types of merchants and PSPs.

The User and Access Management is part of the Worldline Multi Service Platform and offers several opportunities for authorized users to manage user data: The research functionality provides several filter criteria in order to insure a diversified retrieval of data records.

The User Management GUI application supports the following features:

- Access control (Login) via personified login page
- Multi language setting
- Search User Data
- Display result lists for all searches
- View and Edit User and Profile Data

- Block and unblock User
 - Delete User
 - Reset Password
- Create new User
- Export all lists and detail data in CSV and XML format.
- Print view of all lists and detail data.

Profile and permission assignments of users and user groups are not adjustable via the Graphical User Interface, these features are delivered via scripts.

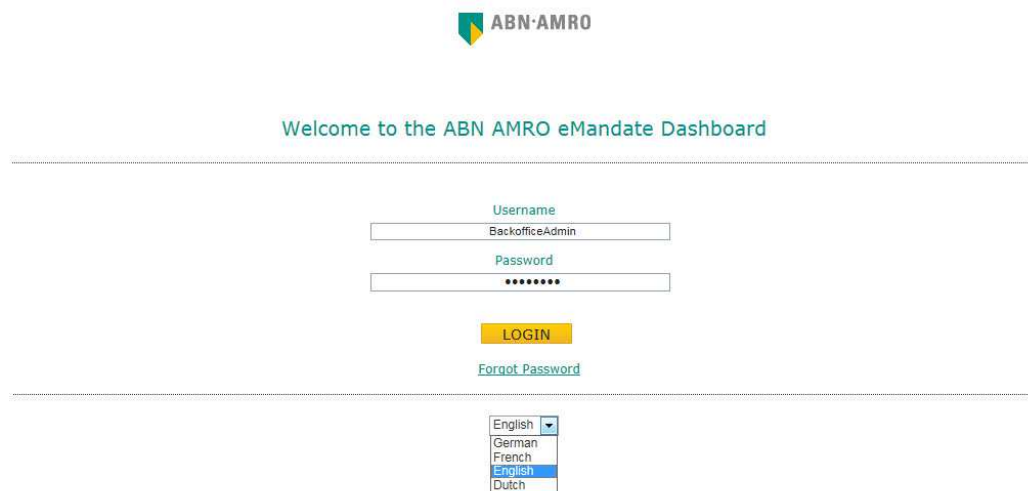
After a short introduction to the general mask layout, the document details out all system functionalities mentioned above.

The User Management Graphical User Interface supports the following browsers:

- Mozilla Firefox
- Microsoft Internet Explorer from Version 9, recommended from version 11.
- Chrome

3 General Introduction

3.1 Overview



The screenshot shows the login interface for the ABN AMRO eMandate Dashboard. At the top, the ABN AMRO logo is displayed. Below it, the text "Welcome to the ABN AMRO eMandate Dashboard" is centered. The login form consists of two input fields: "Username" with the text "BackofficeAdmin" and "Password" with masked characters. A yellow "LOGIN" button is positioned below the password field. A link for "Forgot Password" is located below the login button. At the bottom, there is a language selection dropdown menu with options: English (selected), German, French, and Dutch.

Figure 1: Login screen

Use this form to log in the graphical web user interface. Enter your user name and your correct password in the according fields and submit via the **Login** button. If the entered data don't match with your user data, an error message (Authorization failed) will be displayed on the screen. After successful validation you are logged in the application. The structural and functional setting of most of the available main and submenus is similar. So the next chapters details out general functions and typical tasks.

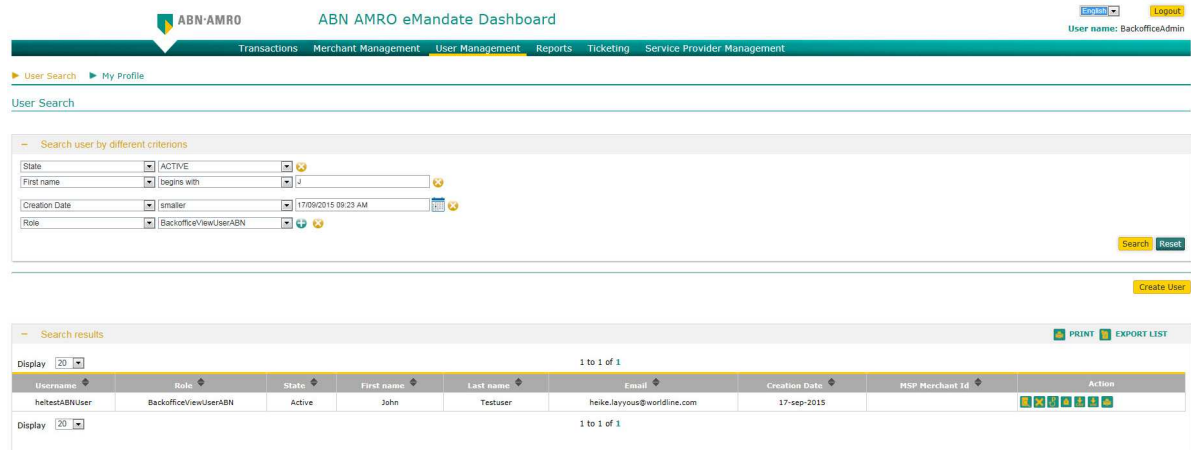
Back to the Login Page: Beside the login fields, the following items are displayed: At the top of the active screen you'll find the system name, "ABN AMRO eMandate Dashboard".

Under the login fields you can use the link **Forgot Password** to follow the request new password dialog. How you pass the dialog is explained in chapter 5.2 Login Page – Forgotten Password.

Via the combo-box you can change the language setting of the login page. The initial language of the **login page** at start-up depends on the current system setting. If you use the drop down box on the login page to change the language it only will be switched temporary and will not be stored in the data base. For example, if the system language is set to French, the login page will be displayed always in French language, irrespective of whether it was changed before or not (more information on language change you'll find in chapter 5.3 Language Change).

3.2 Layout in General

The illustrations below shows the search and result list of the form **Search User** as an example for the general mask layout:



The screenshot shows the ABN AMRO eMandate Dashboard with the 'User Management' menu item selected. The 'User Search' form is displayed, showing search criteria for State (ACTIVE), First name (starts with J), Creation Date (smaller than 17/09/2015 09:23 AM), and Role (BackofficeViewUserABN). The search results table shows one user: John Testuser, with email heike.layous@worldline.com, created on 17-sep-2015.

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
heikeABNUser	BackofficeViewUserABN	Active	John	Testuser	heike.layous@worldline.com	17-sep-2015		[Icons]

Figure 2: General GUI layout


In order to achieve this dialog, we chose the main menu item **User Management** and the sub menu item **User Search**.


As you can see in the illustration a main menu item may probably have one or more sub menu items. It will become visible if the user clicks on the main menu item.

After clicking the desired main menu item the first sub menu item is marked as selected by default and the page associated with this preselected sub menu item is displayed directly without any further user interaction required.

In case of the main menu item **User Management** this is the sub menu item **User Search**.

In a next step we selected the search criteria **State**, and chose the condition **ACTIVE** from the list box.

Now we clicked the  button to create another search line, because we only want to look for users with a special First name (whose First name starts with the letter J and whose State is ACTIVE) and inserted the letter **J** into the text field.

Now we clicked the  button again to add another search line. First we chose the criterion **Creation Date** and the condition **smaller** from the list box. Via the data picker we selected the date 17/09/2015 09:23 AM to receive a result list, which only includes users, which were created before this date.

After this we added another search line: We selected the criteria **Role** and chose one of the available profiles: the BackofficeViewUserABN.

After clicking the button **Search**, all lines are automatically combined with each other via the logical operator **and** the result list is displayed on the screen.

Now have a look on the complete Search – and Result List:

At the top of the active screen – as described above - the system name, "ABN AMRO eMandate Dashboard", a combo box for changing the language of the application and the so-called branding, in this case the ABN AMRO Logo, is included.

You can use the combo-box to change the language setting at runtime. If the user is logged in to the application, the language will automatically be switched to the language that has been assigned to the user account. In our example the application language is English: All forms displayed on the screen include English text. If you change the language settings via the combo box for example to Dutch, all available menu items and the form text immediately will be displayed in Dutch language and Dutch is stored for your user in the database. If you start the application again at a later time, the application language will be Dutch.

But note: The initial language of the **login page** at start-up depends on the current system setting. If you use the drop down box on the login page to change the language it only will be switched temporary and will not be stored in the data base. For example, if the system language is set to French, the login page will be displayed always in French language, irrespective of whether it was changed before or not.

Depending on the user role, the displayed login information can vary. After successful login as merchant your user name is displayed in the header, as bank user (here: Backoffice_Admin), only the user name is displayed:



Figure 3: Example Login as bank user

The link **Logout** leads to the following dialogue:

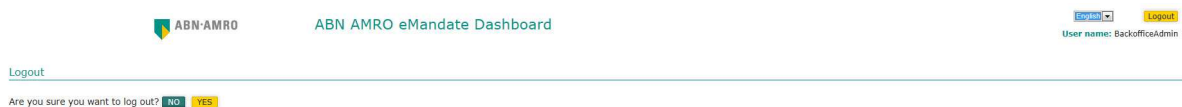


Figure 4: Logout Dialog

This dialog will enable you to decide, if you really want to log out the system. If you want to follow up working, use the link: **No**.

You are immediately forwarded back to the GUI applications **Welcome screen**.

If you click the link **Yes**, the system will process the log out and the login page will be displayed on the screen again.

Now back to the general mask layout: In the same section– in the middle of the screen

– you'll find beside user information the navigation bar.

Here all main menu options are displayed. Which functionalities are available, depends on the user role the current user has.

In the same time the navigation bar serves as guidance: All links to the main menu items are integrated in the green borderline at the top of the screen and are shown in white colour, additionally an active link is underlined in orange colour. So you can see at any time in which section you are working.

Depending on the selected functionality and its according forms, the main-content area may have several possible appearances. It includes forms which belong to the selected main menu option. The contents and appearances of these forms depend on the selected business process' requirements.

If there are several tasks belonging to one business process – as in our example to the business process **User Management** the tasks **User Search** and **My Profile**, you will select each single task via the concerning tab. If there are several tabs, the active tab will be marked in yellow letters (here: **User Search**). Additionally below the tabs you'll find information about the active form you are working on (here User Search -> User Search).

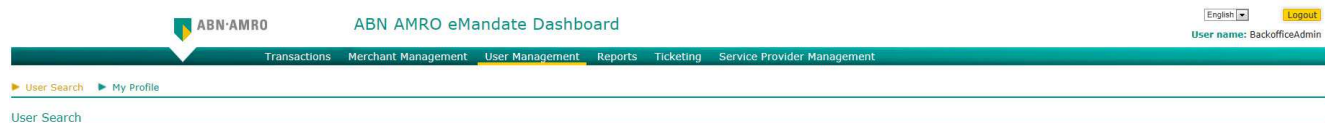


Figure 5: Main menu options and tabs

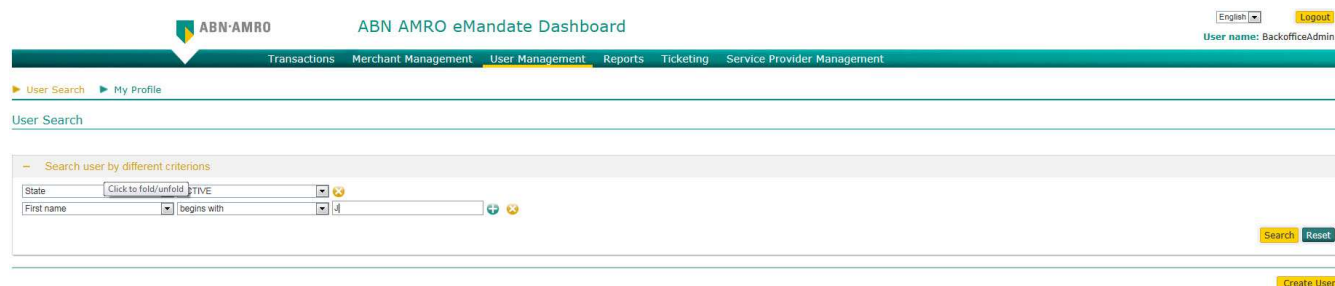


Figure 6: Close search panel

Most of the displayed forms contain a so called close or open button. Clicking on this button the area (e.g. search or search results) can always be hidden or shown.

Mainly if a search is successful and the result list extensive, it will make sense to hide the area of search criteria in order to win more space for the result list in the main content area. Depending on the selected functionality and its according forms, the main content area may have several possible appearances:

- Search form and result list
- Details of an entity

- Warnings and System Messages
- GUI Screen Printing and Export



Figure 7: Footer

The bottom of the page contains the footer. It includes production year, copyright data and the current version number.

3.3 Search and Result Forms

3.3.1.1 Search

3.3.1.2 Overview

The search form enables the user to a directive search for data records in order to

- get further information on the displayed records and / or
- trigger follow-up action (e.g. details view, print or export).

The entry to these follow-up actions is via the search form and its result list. The illustration below shows a typical search form:

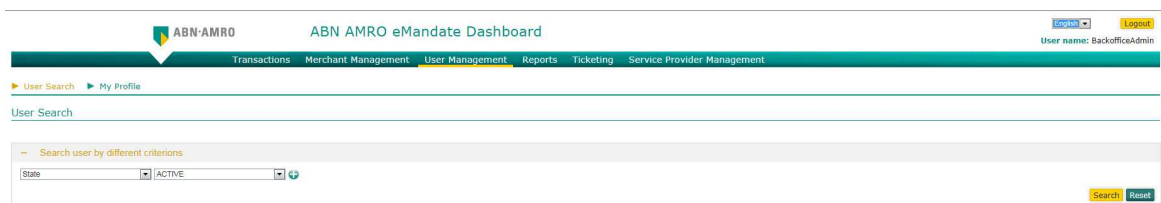



Figure 8: A typical search form

The form is composed of an input area on the top and a result area on the bottom of the panel. The example shows the input area. If you open the form for the first time, you will find a predefined standard search setting. This may consist of only one filter criteria, a combo box including a condition and an input field or – due to the requirements of the business process – a combination of several criteria.

To change the standard setting, define and process an individual search, you can either start a so called wild card search (no specification of filter criteria) or a research using one or more criteria (see chapter 3.3.1.6 Individual Search based on two or more filter criteria).

To maximize the list of criteria, use the button **ADD**  and several search criteria "lines" may be automatically concatenated by **and**.

To minimize the list of criteria, use the button **REMOVE**  or start a wildcard search.

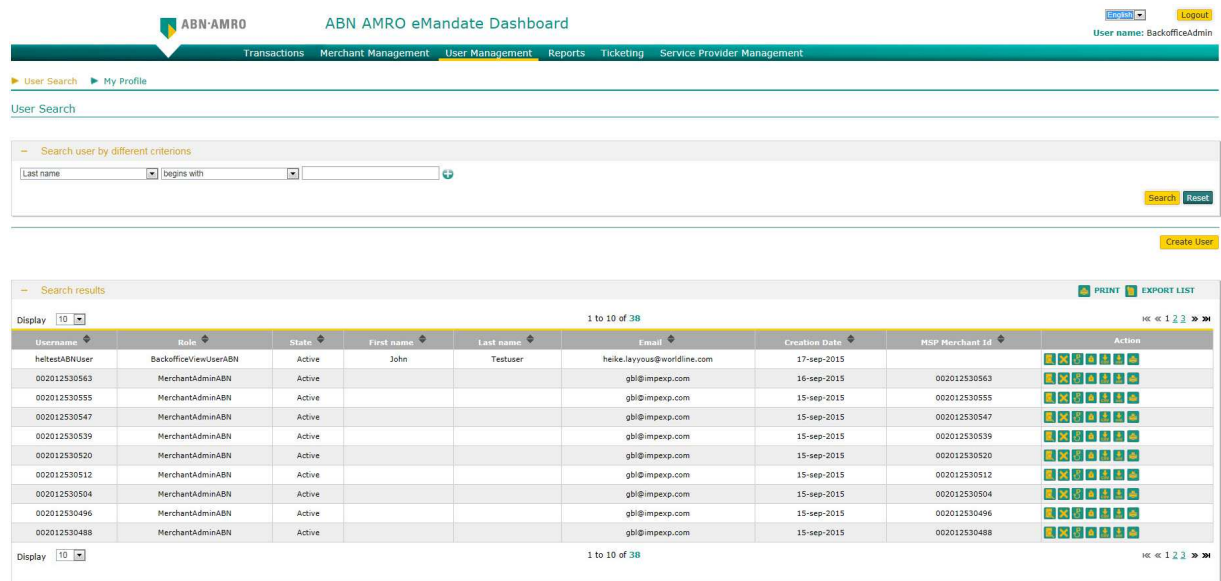
3.3.1.3 Wildcard Search

Starting a search, you always have the possibility to leave the input field empty, the system will start a so called wildcard search.

In our example we selected the criterion **Lastname** and left the input field open. That means: All available Users are retrieved in single blocks of a pre-defined size in the result area of the form. The first row of the list includes the first search criterion, in our case: Username.

If you open the **User search** link for the first time, as a default, the criterion **State** combined with the condition **ACTIVE** will be displayed automatically on the screen. After selecting the button **Search** only **active users** will be displayed in the result list.

To perform the wildcard search you must select a criterion actively, which expects an alphanumerical input in the according input field. If you leave this input field open, the system will start the wildcard search (and the result list will include e.g. active, blocked and deleted users)



The screenshot shows the ABN AMRO eMandate Dashboard. The 'User Search' section is active. The search criteria are 'Last name' and 'begins with'. The results table shows 10 users, including 'heltestABNUser' and several 'MerchantAdminABN' users. The table columns are: Username, Role, State, First name, Last name, Email, Creation Date, MSP Merchant ID, and Action.

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant ID	Action
heltestABNUser	BackofficeViewUserABN	Active	John	Testuser	heike.layruss@worldline.com	17-sep-2015		
002012530563	MerchantAdminABN	Active			gbl@impexp.com	16-sep-2015	002012530563	
002012530555	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530555	
002012530547	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530547	
002012530539	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530539	
002012530520	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530520	
002012530512	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530512	
002012530504	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530504	
002012530496	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530496	
002012530488	MerchantAdminABN	Active			gbl@impexp.com	15-sep-2015	002012530488	

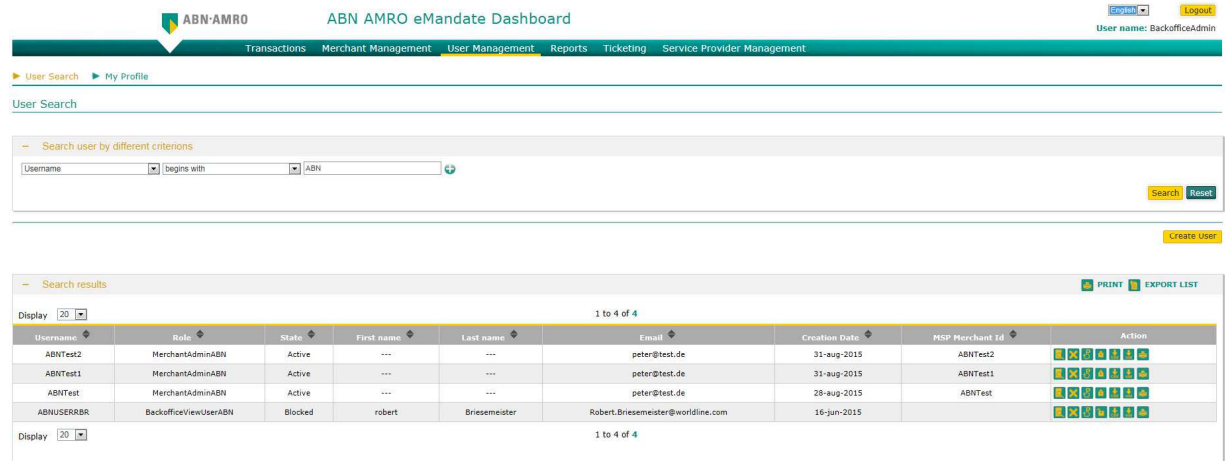
Figure 9: Wildcard Search

3.3.1.4 Individual Search based on one filter criterion

For an individual search, choose a search criterion from the first combo box. The list box beside includes an appropriate selection of filter conditions for the selected criterion. Which filter conditions are available, depends on the character of this criterion.

A criterion could be for example any ID, containing alphanumerical characters or as in

our example the **Username**. The list box offers the suitable conditions for criterions with alphanumerical characters: **begins with**, **contains**, **equal**, and **not equal**:



The screenshot shows the ABN AMRO eMandate Dashboard. The top navigation bar includes links for Transactions, Merchant Management, User Management (active), Reports, Ticketing, and Service Provider Management. The User Search section is active, showing a search form with the following fields: Username (dropdown), Condition (dropdown set to 'begins with'), and Value (text field set to 'ABN'). A Search button is present. Below the search form, the Search results are displayed in a table with 10 columns: Username, Role, State, First name, Last name, Email, Creation Date, MSP Merchant Id, and Action. The table shows 4 results, with the first three being 'ABNTest2', 'ABNTest1', and 'ABNTest', all with roles 'MerchantAdminABN' and state 'Active'. The fourth result is 'ABNUSERBR' with role 'BackofficeViewUserABN' and state 'Blocked'. The table is paginated to show 1 to 4 of 4 results.

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
ABNTest2	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest2	[Icons]
ABNTest1	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest1	[Icons]
ABNTest	MerchantAdminABN	Active	---	---	peter@test.de	28-aug-2015	ABNTest	[Icons]
ABNUSERBR	BackofficeViewUserABN	Blocked	robert	Briesemeister	Robert.Briesemeister@worldline.com	16-jun-2015		[Icons]

Figure 10: Search form – Individual Search

We selected the condition **begins with** and inserted "ABN" into the text field. This means, that the user wants to view all users whose Alias begins with the letters "ABN". The search process takes exactly these setting into account: all users, whose Alias start with "ABN", will be displayed in the result list, if there exist such values.¹

There are also criteria, which do not have a set of comparison expressions associated with them, but show a list of predefined values after being selected. For example the criterion **State** as described above or the criterion **Role**: there is no input field to be filled, you have to specify **State** or **Role** as e.g. **Active** for State or **BackofficeAdmin** **ABN** for **Role**.

3.3.1.5 Search settings and filter conditions

As stated above we saw, that the number and type of selectable filter conditions depend on the character of the search criteria. The following table gives a survey of possible combinations. In addition further search settings and conditions are explicated in the course of the document:

¹ Possible combinations are explicated in table 1 and in the course of the document.

Name	Description
Criteria as: Username Email Firstname Lastname User id Sub user id External user id	<p>Because all of the criteria listed in the left column can consist of alphanumerical characters, you can use the following comparisons suitable for AN values:</p> <p><i>begins with</i>: Enter only the first or some more numbers or letters of the term you're searching for.</p> <p><i>contains</i>: Enter some numbers or letters of the term you're searching for. The entered letters can be located anywhere in the term you're searching for (start, middle or end).</p> <p><i>equal</i>: Enter the complete expression you're looking for.</p> <p><i>not equal</i>: Enter one or more letters or numbers the term you're searching for may not contain.</p>
Criteria as: Transaction id	<p>If you select a search criterion which is stored as a numerical type in the database, you can choose between the following comparisons for you search dialog:</p> <p><i>equals or null</i>: The term you're searching for must exactly match the numbers you entered or be null.</p> <p><i>greater</i>: The term you're searching for shall be greater than the number you entered.</p> <p><i>greater or equal</i>: The term you're searching for shall be greater than or equal to the number you entered.</p> <p><i>not equal</i>: The term you're searching for shall be different from the number you entered.</p> <p><i>smaller</i>: The term you're searching for shall be smaller than the number you entered.</p> <p><i>smaller or equal</i>: The term you're searching for shall be smaller than or equal to the number you entered.</p>
Criteria as: Role State URL	<p>Those criteria do not have a set of comparison expressions associated with them, but show a list of predefined values after being selected. Those predefined values are usually status values, types, etc.</p>

Table 1: Usage of search criteria

Now let's have a look on the criterion **Creation Date**:

A search criterion as **Creation Date** owns on database side a date or timestamp format.

To support the user in entering correctly formatted date or timestamp values, a date picker button is shown. It is placed on the right side next to the search term input field.

This text field isn't changeable, the setting is read only. Therefore the user can only use

the date picker calendar element to select a value, which will be inserted automatically into the search term input field (see fig. 12).



Figure 11: Date Picker Element

If you start the search process, all users, which are created exactly on the date or before this date (according to the selected condition **smaller or equal**), stated in the text field, will be displayed in the result list.

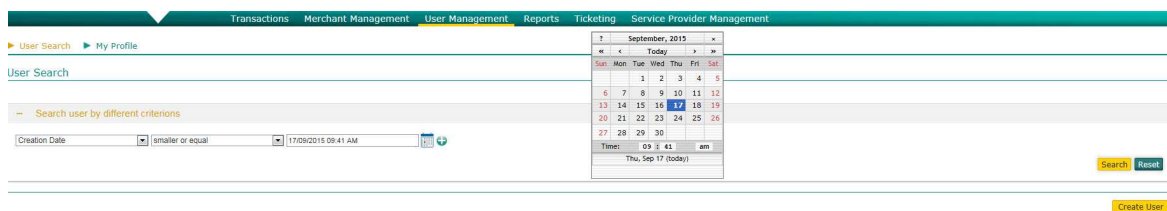


Figure 12: Search form – date picker element with calendar

To search for items created in a certain time range, you can add one or more search criteria line(s) in the finder panel. How you can do this is explained in the next chapter.

3.3.1.6 Individual Search based on two or more filter criteria

For a customized search based on two or more criteria you can work with several search lines via using the buttons **ADD**  or **REMOVE** .


We will explain how to carry out a customized search by means of the example **Creation Date**:

Assumed you start a research on 17/09/2015 at 09:41:00 AM and would like to search for Users created on this day. If you select the criterion **Creation Date** from the combo box, the input field will automatically be filled with the current timestamp. In the next step select a condition from the combo box – in our case **smaller or equal** – and use the left mouse cursor to click into the input field or on the calendar. Finally you can use the calendar to choose time and date for your research as follows:




Figure 13: Search form - date

To change between the months or weeks, use the different arrow-buttons. A mouse click on the link **Today** or into the input field resets the date to the current time and date.

To add a second criterion line in the finder panel use the button **ADD** :

Now you can define the **second search line**:

In our example we chose **State** as second criterion and selected **Active** from listbox. The system will automatically combine the inserted date in the first line with the defined state in the second line, what means: Exactly all Users created after 17/09/2015 at 09:41:00 AM whose state is **Active** will be displayed in the result list.

Now select a **third line** via clicking the button **ADD** :

In our example we chose **Username** as third – alphanumerical - criterion and combine it with the condition **begins with**. In the text field we inserted the letters **"ABN"**.


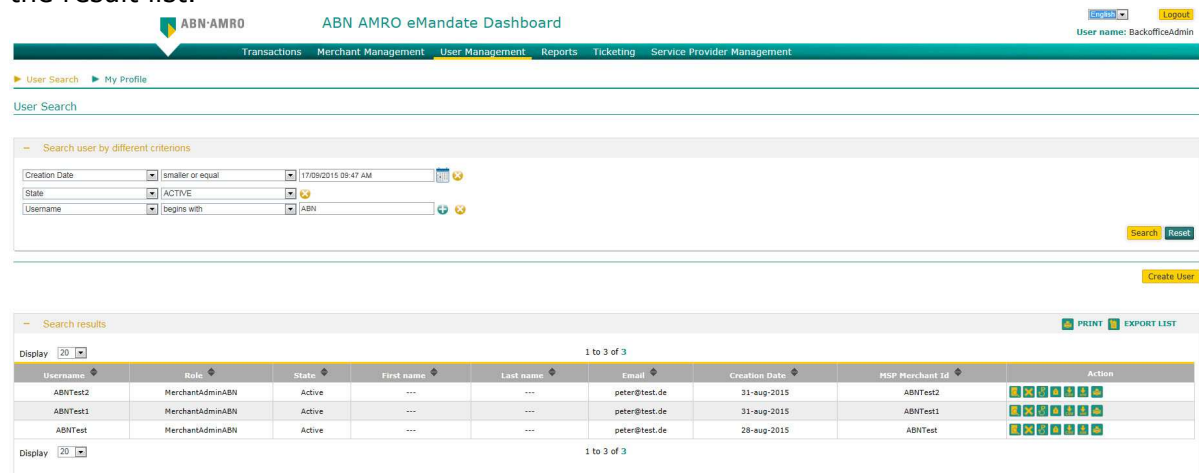
Now you can click the button **Search** to trigger the search process. The system automatically combines and controls your input data. Or you also can repeat the procedure as long as you have reached the desired search adjustments. To close the last search line, click the button .



Figure 14: Search – two or more criteria

In our example the following customized search will be carried out:

The system automatically combines the inserted date in the first line with the defined state in the second line, and matches it with the information of the third line, what means: Exactly all Users created after 17/09/2015 at 09:41:00 AM whose state is **Active** and whose **Username** name starts with the **letters** "ABN" will be displayed in the result list.



Search criteria:

- Creation Date: greater than 17/09/2015 09:41 AM
- State: Active
- Username: begins with ABN

Search results:
















Username	Role	State	First name	Last name	Email	Creation Date	WSP Merchant Id	Action
ABNTest2	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest2	    
ABNTest1	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest1	    
ABNTest	MerchantAdminABN	Active	---	---	peter@test.de	28-aug-2015	ABNTest	    

Figure 15: Search criteria and Result List of a customized search

If the defined filter conditions don't lead to a result, the search mask will be redisplayed in the main content area. Below the search mask an empty result table and a message as shown in the example is displayed.



No users with this criterions were found.

Figure 16: Search form – no Operations found

3.3.2 Search Result

The result list displays the data records found in a table:



Username	Role	State	First name	Last name	Email	Creation Date	PSP Merchant Id	Action
ABNTest2	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest2	[Icons]
ABNTest1	MerchantAdminABN	Active	---	---	peter@test.de	31-aug-2015	ABNTest1	[Icons]
ABNTest	MerchantAdminABN	Active	---	---	peter@test.de	28-aug-2015	ABNTest	[Icons]

Figure 17: Search Result List

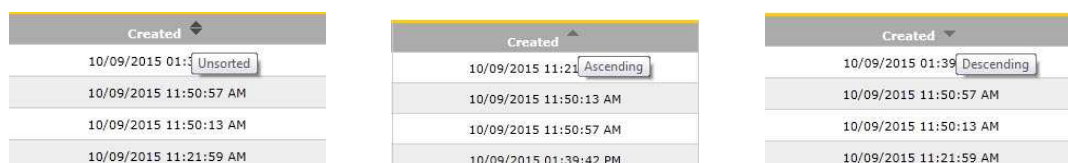
As standard the displayed number of results is 5. The results are retrieved in single blocks of a pre-defined size. Each result list includes a drop down box **Display** which you can use to change the number of rows as selected. The maximum number to be displayed is 100. A message informs about the total number of results and the active number of displayed results. Generally all result tables include standard buttons and pagination to browse through the result table or navigate from one block to the other:

Button	Description
⏪	Previous
⏪	Previous inactive
⏴	First
⏴	First inactive
⏵	Next
⏵	Next inactive
⏴	Last
⏴	Last inactive

Table 2: Pagination buttons

Furthermore clicking on any column header you can sort the result up (descending) and down (ascending).

As standard the result data are unsorted. The first click on the arrow leads to an ascending grading, a second click to a descending grading:



Created
10/09/2015 01:39:42 PM
10/09/2015 11:50:57 AM
10/09/2015 11:50:13 AM
10/09/2015 11:50:57 AM
10/09/2015 11:21:59 AM

Figure 18: Sorting possibilities

The result rows may be partially selected and it is possible to perform further tasks that correspond to the selected row data (e.g. displaying a detail form). By default the context menu contains the following default actions:









Button	Description
 PRINT	PRINT: Opens preview, from where the data of all results matching the entered filter criteria can be printed, not only the ones visible in the result list.
 EXPORT LIST	EXPORT LIST: Shows a dropdown with two export options, if the mouse pointer is hovered over this button.
 EXPORT CSV	EXPORT CSV: Opens dialog window from where the data of all results matching the entered filter criteria with all supported columns can be exported in CSV format, not only the ones visible in the result list.
 EXPORT XML	EXPORT XML: Opens dialog window from where the data of all results matching the entered filter criteria with all supported columns can be exported in XML format, not only the ones visible in the result list.
	Details: Changes the main content view and goes to the Overview form – details view.
	Export: Opens a dialog from where the selected data can be exported to csv-format.
	Export: Opens a dialog from where the selected data can be exported to xml-format.
	Print: Opens a preview, from where the data can be printed.

Table 3: Result List action buttons

3.4 Print and Export

At any time it is possible to export and print data shown on a screen or the full result of a search Operation to CSV and XML format on the local workstation.

3.4.1 Print

Press the button **PRINT** at the upper right border of the search result list and a new window opens with a printer friendly (black / white) representation of the result list data. The print window contains two buttons **PRINT** and **CLOSE** in order to print the data or change back to the last screen view.

Pressing the button or Link **PRINT**, the print dialog will be opened to select and setup the used printer.

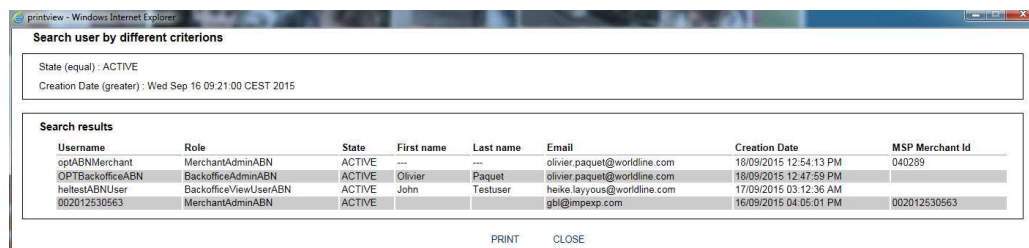


Figure 19: Print view of user search result list

3.4.2 Export

Hoover with the mouse pointer above the Link **EXPORT LIST** and press the item **EXPORT CSV** or **EXPORT XML**, which are visible both now as fly out menu entries.

After pressing the link **EXPORT CSV** or **EXPORT XML** the application internally generates the content for the download file and makes it available to the web browser as download stream.



Figure 20: Result list export download dialog MS Internet Explorer.

While the CSV format has flat data representation, XML has a hierarchical one, so both exports differ in their structure a bit.

```
<?xml version="1.0" encoding="UTF-8"?>
- <user-data>
  - <user deleted="false">
    <prnUid>optABNMerchant_ABN</prnUid>
    <alias>optABNMerchant</alias>
    <role>MerchantAdminABN</role>
    <status>ACTIVE</status>
    <firstname>---</firstname>
    <lastname>---</lastname>
    <email>olivier.paquet@worldline.com</email>
    <creationDate>18/09/2015 12:54:13 PM</creationDate>
    <mandator>ABN</mandator>
    <initiatingPartyId>040289</initiatingPartyId>
  </user>
  - <user deleted="false">
    <prnUid>OPTBackofficeABN_ABN</prnUid>
    <alias>OPTBackofficeABN</alias>
    <role>BackofficeAdminABN</role>
    <status>ACTIVE</status>
    <firstname>Olivier</firstname>
    <lastname>Paquet</lastname>
    <email>olivier.paquet@worldline.com</email>
    <creationDate>18/09/2015 12:47:59 PM</creationDate>
    <mandator>ABN</mandator>
    <initiatingPartyId>null</initiatingPartyId>
  </user>
  - <user deleted="false">
    <prnUid>heltestABNUser_ABN</prnUid>
    <alias>heltestABNUser</alias>
    <role>BackofficeViewUserABN</role>
    <status>ACTIVE</status>
    <firstname>John</firstname>
    <lastname>Testuser</lastname>
    <email>heike.layyous@worldline.com</email>
    <creationDate>17/09/2015 03:12:36 AM</creationDate>
    <mandator>ABN</mandator>
    <initiatingPartyId>null</initiatingPartyId>
  </user>
  - <user deleted="false">
    <prnUid>002012530563_ABN</prnUid>
    <alias>002012530563</alias>
    <role>MerchantAdminABN</role>
    <status>ACTIVE</status>
    <firstname>null</firstname>
    <lastname>null</lastname>
    <email>gbl@impexp.com</email>
    <creationDate>16/09/2015 04:05:01 PM</creationDate>
    <mandator>ABN</mandator>
    <initiatingPartyId>002012530563</initiatingPartyId>
  </user>
</user-data>
```

Figure 21: Result list export as XML file.

prnUid	Username	Role	State	First name	Last name	Email	Creation Date	mandator	MSP Merchant Id
optABNMerchant	optABNMerchant	MerchantAdmin	ACTIVE	---	---	olivier.paquet@worldline.com	18/09/2015 12:54:13 PM	ABN	40289
OPTBackofficeABN	OPTBackofficeABN	BackofficeAdmin	ACTIVE	Olivier	Paquet	olivier.paquet@worldline.com	18/09/2015 12:47:59 PM	ABN	null
heltestABNUser	heltestABNUser	BackofficeViewUser	ACTIVE	John	Testuser	heike.layyous@worldline.com	17/09/2015 03:12:36 AM	ABN	null
002012530563	002012530563	MerchantAdmin	ACTIVE	null	null	gbl@impexp.com	16/09/2015 04:05:01 PM	ABN	2012530563

Figure 22: Result list export as CSV file.

4 General Technical Overview

4.1 General Overview of Use Cases

The User and Access Management provides the following major topics:

- Users
- Permissions
- Roles
- Principals
- Credential types
- Credentials
- User – credential assignments
- User – role assignments
- User resources
- Group resources

While the **User Management** is carried out via the according GUI application, the **Management of profile and permission assignments** of users and user groups (as stated in the list above) is not adjustable via the Graphical User Interface, these features are delivered via scripts.

The User Management GUI supports the following features:

- Access control (Login) via personified login page
- Multi language setting
- Search User Data
- Display result lists for all searches
- View and Edit User and Profile Data
 - Block and unblock User
 - Delete User
 - Reset Password
- Create new User
- Export all lists and detail data in CSV and XML format.
- Print view of all lists and detail data.

5 GUI Overview

5.1 Login

To open the application in your web browser ensure that the client certificate for the SSL connection to the web server hosting the application is appropriately installed. For more information ask your operator or technical support.

If the certificate is present in your web browser, ask your technical support for the exact application URL.

If the correct URL opens, the Worldline Multi Server Platform web user interface will start with the following logon screen:

The screenshot shows the login interface for the ABN-AMRO eMandate Dashboard. At the top center is the ABN-AMRO logo. Below it is the text "Welcome to the ABN AMRO eMandate Dashboard". The login form consists of two input fields: "Username" with the text "BackofficeAdmin" and "Password" with masked characters "*****". Below these fields is a yellow "LOGIN" button. Under the button is a link "Forgot Password". At the bottom of the form is a language selection dropdown menu with the following options: English (selected), German, French, English, and Dutch.

Figure 23: Login page

Enter your user name and the correct password in the according fields and submit via the button Login. If the entered data don't match with your user data, an error message (Authorization failed) will be displayed on the screen.

Most of the browsers allow saving log-on data. If you agree to save your data, the system will display your settings during the next system start. Via mouse click you can select the data, which are taken over automatically.

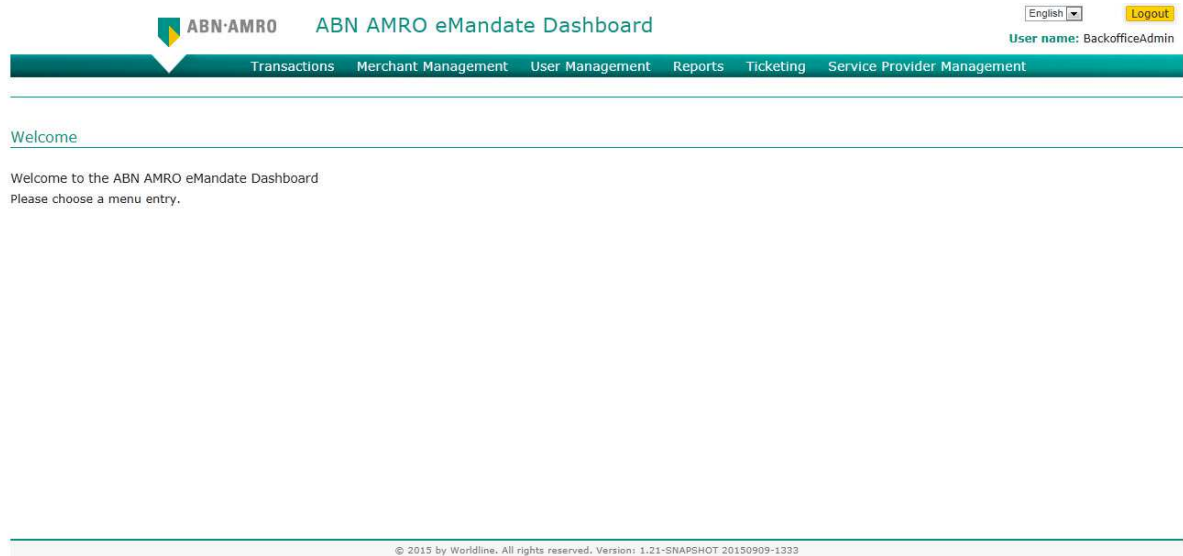


Figure 24: Welcome Screen

If you have logged in successfully to the welcome page, all main menu items will be displayed in the menu area at the top of the application window below the application title.

The main menu item **User Management** is the parent menu item of the two sub menu items **USER SEARCH** and **My PROFILE**.

Selecting the **User Management** will show the associated sub menu items and opens the User Search dialog automatically without any further user interaction through the user.

If you want to select another sub menu item than **User**, just click on the menu item. After that it will be marked as selected (underlined in orange colour).

All sub menu items associated with User Management offer functionality to search for, view and edit different entities like User Data or Profile Data. For the search different filter criteria can be used in any combination, result lists and detail data screens are displayed and all data can be printed. (see chapter 3.2 Layout in General and 3.3 Search and Result Forms).

5.2 Login Page - Forgotten Password

Use the link **Forgot Password** in the login mask of the application to request a new password. The following page is displayed on the screen:



Figure 25: Start screen request new password

As you can see in the illustration you have to fill in the following two input fields correctly:

Username: Insert you User name.

Email: Insert your valid Email Address.

After clicking the button **REQUEST NEW PASSWORD** the system validates the entered eMail address and controls if the combination of User name and eMail address exists. In case of unsuccessful validation the system displays an according error message like "The combination of User name and entered eMail address does not exist".

If the validation was successful, a system message informs you, that you will receive an Email asking you to renew your password by clicking the link embedded in the message. In the same time a link pointing to the password renewal page is generated by the system and an eMail is sent to the mail address given in the appropriate user data record.

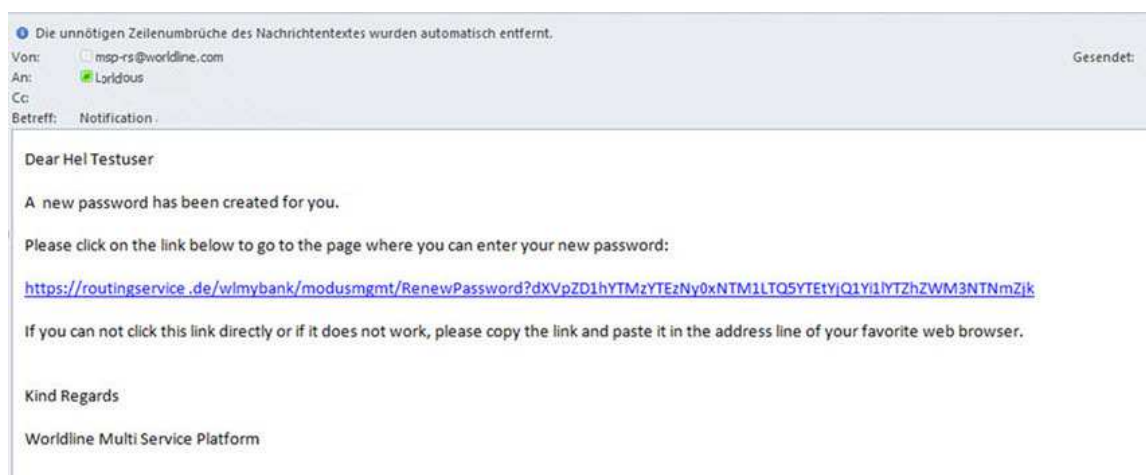


Figure 26: Example of a notification Email message

After clicking the link the following page is displayed on the screen:



ABN-AMRO

Renew Password

new password

repeat password

SAVE

Figure 27: Renew Password

Enter your new password in the according fields twice and use of the password rules, which you can view after clicking the blue question mark button.

It is important to select an unique password, not one which is already in use in another context or has been used before.

After clicking the button **Save**, the system starts the validation process as follows:

- Both passwords must be identical.
- The new password must match the valid password rules.

After successful validation the new password will be stored in the system database.

Now the login page is re-displayed on the screen including a system message, which invites you to login using your new password. After clicking the button **Save**, the validation process starts:

- Does a user with the entered Alias and password exist?
- Is the user found in the right state to perform login (not blocked, not deleted)?

After successful authentication and authorization by the system, all user information is made available to the application session and the Welcome Page will be displayed.

If one or more validations fail, an according error message will appear on the screen:

- If the new password does not fulfil the password rules, an information and a short explanation of the rules is displayed. The user is invited to enter his password twice again.
- If the link, which has been sent via Email, has been expired, an information is

generated and the user is invited to request for new password again.

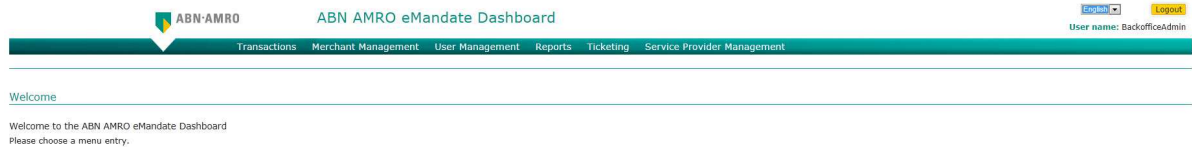


Figure 28: Welcome Screen

If you have logged in successfully to the welcome page, all main menu items will be displayed in the menu area at the top of the application window below the application title.

The main menu item **User Management** is the parent menu item of the two sub menu items **User Search** and **My Profile**.

Selecting the **User Management** will show the associated sub menu items and opens the Search dialog automatically without any further user interaction through the user.

If you want to select another sub menu item than **User Management**, just click on the menu item. After that it will be highlighted as selected: It will be underlined in yellow colour.

All sub menu items associated with the **User Management** offer functionality to search for different entities like User Data. For the search different filter criteria can be used in any combination, result lists and detail data screens are displayed and all data can be printed. (see chapter 3.2 Layout in General and 3.3 Search and Result Forms).

5.3 Login Page - Language Change

Use the select box in the login mask of the application to change the language setting of the login form. The initial language of the login screen before login depends on the current system setting. But as soon as you are logged in the application, the language is switched to the language that has been assigned to your user account in the user administration.


In our example the system language is English, so the Login Screen is displayed in English language.

Example: You are a Dutch user and Dutch is stored as application language for the eMandate Dashboard with your user data.

For a specific reason, your system language is English, but you also would like to view the login page in Dutch. In this case you can switch the language via the select box temporary to Dutch (or any other offered language).

If you log in again at a later time, the login page will be displayed in English language automatically again, because in our case English is stored as system language.

To get access to all menu items of the application, you have to select the correct URL and log in with your valid user data (username and password).



Welcome to the ABN AMRO eMandate Dashboard

Username
BackofficeAdmin

Password

LOGIN

[Forgot Password](#)

English
German
French
English
Dutch


Figure 29: Welcome

From that moment on you have full access to the application, all information is displayed in the language, which is stored with the user, who is currently logged in.

At any time you can use the combo-box in the application area to change the language setting at runtime: The language will automatically be switched and also be stored in the data base.

5.4 User Search

After selecting the sub menu item **User Search**, the according dialog is displayed on the screen as follows:



ABN-AMRO ABN AMRO eMandate Dashboard

Transactions Merchant Management User Management Reports Ticketing Service Provider Management

User Search My Profile

User Search

Search user by different criterions

State ACTIVE

Search Reset

Create User

Figure 30: Search User – Example 1

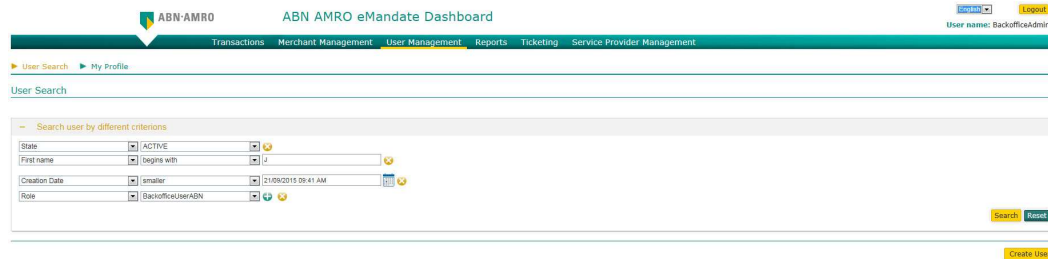


Figure 31: Search User – Example 2

As standard setting the link **USER SEARCH** is active. Via this link you can either

- start a so called Wildcard Search or
- start an individual search based on one filter criterium or
- start an individual search several different filter criteria

In all cases clicking the button

- **Search** will start the search process in the systems database.
- **Reset** will reset the search page to its initial state.

5.5 Search User

Start your **User Search** by selecting the desired search criteria and adding as many search criteria "lines" as you need using the **ADD** icon behind each displayed search line. The following table gives an overview of possible search criteria currently supported:

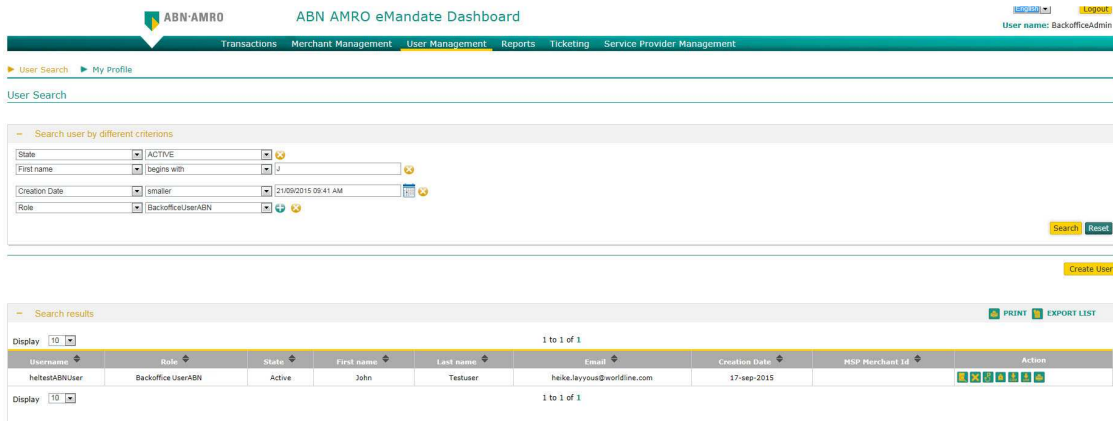
Search Criterion	Supported criterion values
Username	Alphanumerical
Role	Predefined value from Listbox e.g. BackofficeAdmin Worldline
State	Predefined value Listbox: ACTIVE, BLOCKED, DELETED
Creation Date	Selectable via date picker element
First Name	Alphanumerical
Last Name	Alphanumerical
Email	Alphanumerical

In our example 2 we combined four criteria. We chose the **State** "ACTIVE", the **Username** begins with "J", the **Creation Date** must be before (smaller) "21/09/2015" and finally the **Role** "BackofficeUserABN".

All criteria have been connected automatically with the logical operator "and". For a closer look on how to combine search criteria see also chapter 3.3 Search and Result Forms.

5.5.1 User Result List

The result table includes all users, who comply with this condition:



The screenshot shows the 'ABN AMRO eMandate Dashboard' with a navigation bar including 'Transactions', 'Merchant Management', 'User Management', 'Reports', 'Ticketing', and 'Service Provider Management'. The 'User Management' section is active, showing 'User Search' and 'My Profile' links. The 'User Search' form includes filters for State (ACTIVE), First name (begins with J), Creation Date (21/09/2015 09:41 AM), and Role (BackofficeUserABN). Below the search form, the 'Search results' table displays one user record.

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
helkeABNUser	Backoffice UserABN	Active	John	Testuser	helke.layous@worldline.com	17-sep-2015		[Icons]

Figure 32: User Result List

If we have a closer look on the result table, we can see the following columns: The first includes the **Username**, the next displays the **Role**, it follows the **State**, the **Firstname** and **Lastname**, the **Email** and finally the **Creation Date**.

Now looking at the user result data table you can perform the following actions:

- Browsing through the result list using the pagination elements,
- Re-order the result columns according to your requirements by clicking on the column headers,
- Open a printer friendly view for the complete user result list and print it,
- Export user data as CSV file, (download stream to be opened or stored by the user)
- Export user data as XML file (download stream to be opened or stored by the user)
- Open the details screens and sub menus for a selected user.
 - Edit User (the user's detail data are loaded from the systems database and displayed in a separate area under the search result list)
 - Block / Unblock user (the availability of this feature depends on the user's current State, a blocked user can't be blocked a second time)
 - Delete User (the availability of this feature also depends on the user's current State)
 - Reset Password

If you click on one of the action buttons in the result list row, the according detail form will be viewable and editable on the screen.

The first section is folded out and you can view / edit all general detail data. The other sections are available, but hidden. If you click on the arrow on the left, you can open or hide one or more section. If all sections are viewable, the form looks like this:

► User Search ► My Profile

User Search

Search user by different criterions

State: ACTIVE

First name: begins with:

Creation Date: smaller: 21/09/2015 09:41 AM

Role: BackofficeUserABN

Search results

1 to 1 of 1

Display:

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
heltestABNUser	BackofficeUserABN	Active	John	Testuser	heike.layous@worldline.com	17-sep-2015		<input type="button" value="🔍"/> <input type="button" value="🗑️"/> <input type="button" value="🔍"/> <input type="button" value="🗑️"/> <input type="button" value="🔍"/> <input type="button" value="🗑️"/> <input type="button" value="🔍"/> <input type="button" value="🗑️"/>

Display: 1 to 1 of 1

Search user - Detail view

EXPORT DETAILS

Username:	heltestABNUser	First name:	John	Creation Date:	17/09/2015 03:12:36 AM
Role:	BackofficeUserABN	Last name:	Testuser	Blocking Date:	
State:	Active	Language:	en	Lastupdate Date:	17/09/2015 09:23:02 AM
Email:	heike.layous@worldline.com	Expiry Date:	17/07/2017		
Description:	Testuser for Documentation of the ABN User Management				

Figure 33: User Detail View

If the detail view is active, the result list will remain visible, still displaying the current search criteria.

Using one of the buttons in the right corner of the Detail view, you can carry out the according actions. As described above, you'll see, that our heltestABNUser has the State **Active**. This means, that you can **Edit**, **Block** or **Delete** this user or **Reset** the **Password** via the according buttons, displayed in the action area of the result list.

5.5.2 User Details View

As described above you can use the **detail button**  in the action area of the result list to switch directly to the according detail form.

Search user - Detail view

EXPORT DETAILS

Username:	heltestABNUser	First name:	John	Creation Date:	17/09/2015 03:12:36 AM
Role:	BackofficeUserABN	Last name:	Testuser	Blocking Date:	
State:	Active	Language:	en	Lastupdate Date:	17/09/2015 09:23:02 AM
Email:	heike.layous@worldline.com	Expiry Date:	17/07/2017		
Description:	Testuser for Documentation of the ABN User Management				

Figure 34: User Detail View

5.5.2.1 Detail Data

The detail view contains more detail data of the selected user than the result list. All data values are shown in read-only mode:

- Username
- Role
- State
- Email
- Description (Detail description of the selected user)

- First name
- Last name
- Language
- Expiry Date
- Creation Date
- Blocking Date
- Last update Date

Using the buttons on the bottom of the **Detail View** you can perform the following actions:

Edit User: See chapter 5.3.3

Delete User: See chapter 5.3.2

Reset Password: See chapter 5.3.6

Block / Unblock User: See chapter 5.3.5

5.5.2.2 Export / Print Details

Use the link **EXPORT DETAILS** to export or print the detail data of the selected user in **XML** or **CSV** format as described in chapter 3.4.

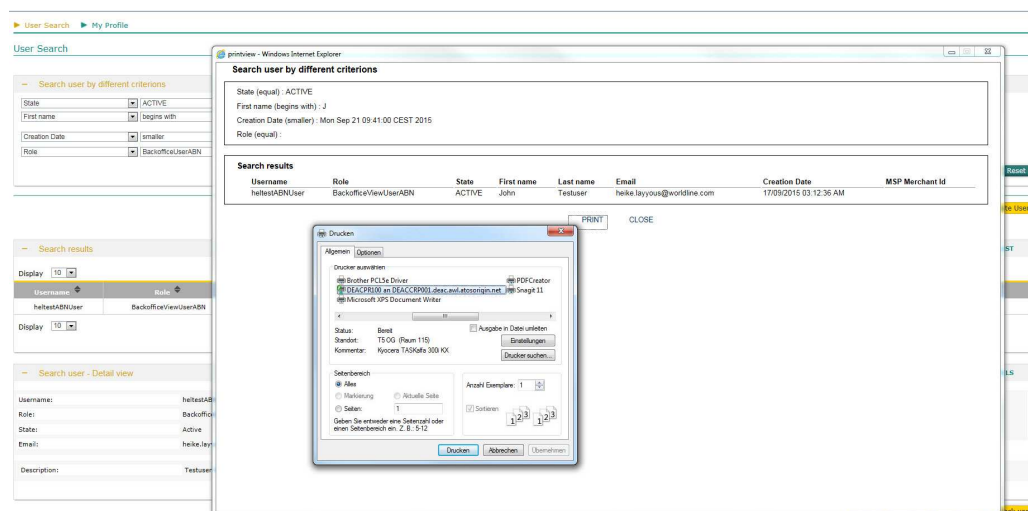
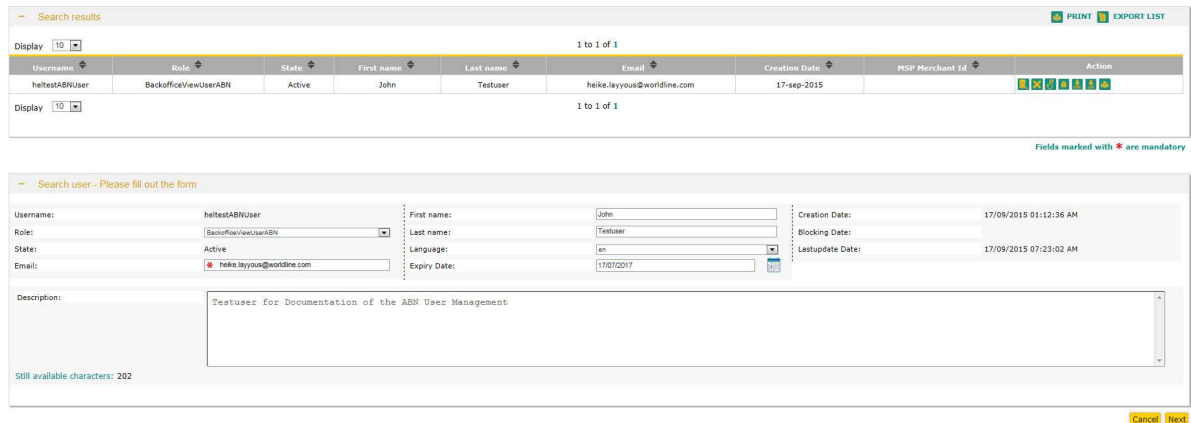


Figure 35: Print / Export Preview

5.5.3 Edit User

To edit the data of the selected user, open the detail view and use the button **Edit User** to switch to the according form. Also here the result list is still displayed above the editable user form:



Search results

Display 10 1 to 1 of 1

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
helixABNUser	BackofficeViewUserABN	Active	John	Testuser	helix.layous@worldline.com	17-sep-2015		[Icons]

Display 10 1 to 1 of 1

Fields marked with * are mandatory

Search user - Please fill out the form

Username: helixABNUser First name: John Creation Date: 17/09/2015 01:12:36 AM

Role: BackofficeViewUserABN Last name: Testuser Blocking Date:

State: Active Language: en Last update Date: 17/09/2015 07:23:02 AM

Email: helix.layous@worldline.com Expiry Date: 17/07/2017

Description: Testuser for Documentation of the ABN User Management

Still available characters: 202

Cancel Next

Figure 36: Edit User

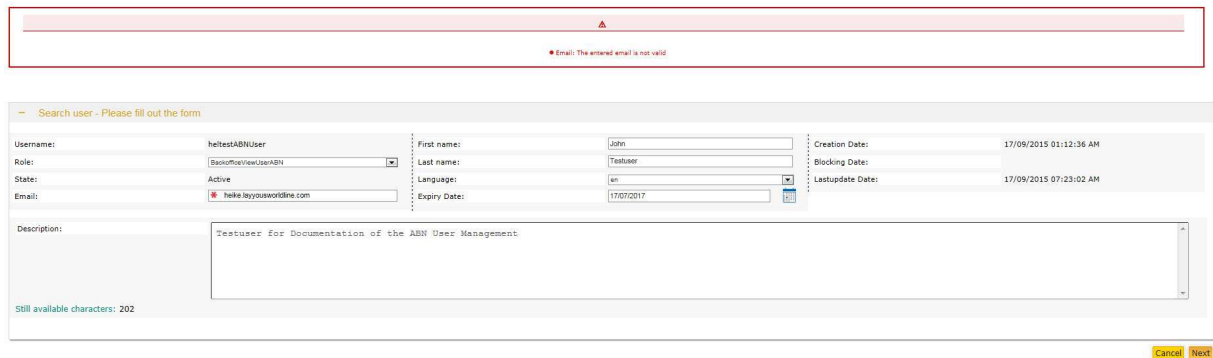
The following table includes all displayed data fields and points out, which fields are editable and which not.

Username	Not editable – Alphanumeric field
Role	Editable predefined role from the list box, which is assigned to the edited user.
State	Not editable in this form
Email*	Editable (The format must be a regular expression)
Description*	Editable (The user can insert additional information)
Still available characters	Information about the number of remaining characters concerning the input of the field "description".
First Name*	Editable: Alphanumeric (The format must be a regular expression)
Last Name*	Editable: Alphanumeric (The format must be a regular expression)
Language	Editable: predefined language setting selectable from the list box
Expiry Date	Editable: Selectable via data picker element
Creation Date	Not Editable: The creation date is generated automatically by the system
Blocking Date	Not Editable: The blocking date is generated automatically by the system in the time when the user is blocked.
Last Update Date	Not Editable: The data is generated automatically by the system.

*Data fields with defined validation rules

At the bottom of the form, you'll find two buttons: **CANCEL** and **NEXT**.

Use the button **CANCEL** to go back to the read-only detail view of the user data. When your modifications have been completed click the button **NEXT**. The system will start a validation on all entries for which validation rules have been set (fields marked with an asterix) If the validation was not successful, the page will be re-displayed in order to edit the field entries again. Incorrect inputs or empty mandatory fields, which did not pass the validation, are marked in red colour:



Warning message after failed validation process (invalid email address)

Search user - Please fill out the form

Username: heltestABNUser First name: John Creation Date: 17/09/2015 01:12:36 AM

Role: BackofficeViewUserABN Last name: Testuser Blocking Date:

State: Active Language: en Lastupdate Date: 17/09/2015 07:23:02 AM

Email: helke.layou@worldline.com Expiry Date: 17/07/2017

Description: Testuser for Documentation of the ABN User Management

Still available characters: 202

Cancel Next

Figure 37: Warning message after failed validation process (invalid email address)

If the validation was successful, the edit page will be re-displayed in read-only view for confirmation:



Search user - Choose 'Save user' when user-data are OK

Username: heltestABNUser First name: John Creation Date: 16/09/2015 11:12:36 PM

Role: BackofficeViewUserABN Last name: Testuser Blocking Date:

State: Active Language: en Lastupdate Date: 17/09/2015 05:23:02 AM

Email: John.Testuser@ABNTest.com Expiry Date: 17/07/2017

Description: Testuser for Documentation of the ABN User Management

Back Cancel Save user

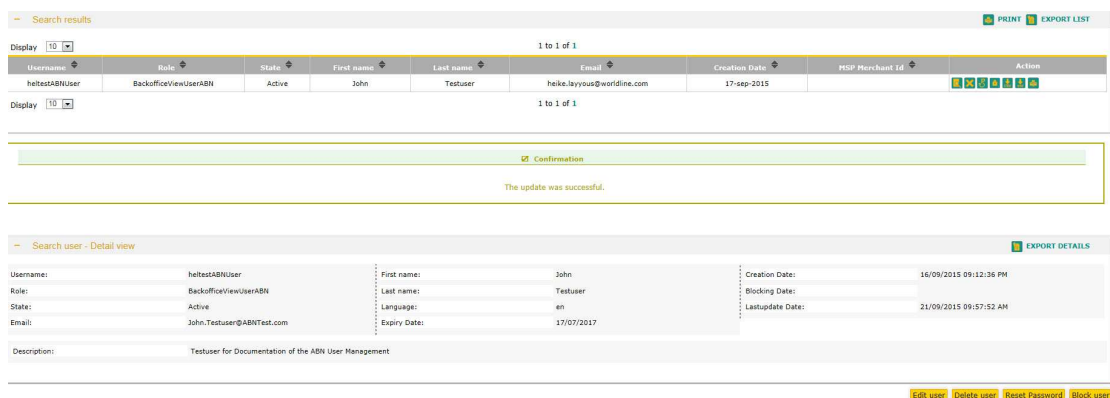
Figure 38: Check your modifications

Use the buttons at the bottom of the form to perform the following actions:

BACK: Re-display the edit page, which includes your last changes in order to make additional modifications.

CANCEL: Switch back to the edit page, which is reset to its initial setting.

SAVE USER: Perform additional validations (of the server). After successful validation a message is displayed on the screen, which informs you about a successful data modifications of the edited user. The changes will be stored in the system database and the edit process will be written to the log table. Finally the updated user details view is displayed on the screen:



Search results

Display 10 1 to 1 of 1

Username	Role	State	First name	Last name	Email	Creation Date	WSP Merchant ID	Action
heltestABNUser	BackofficeViewUserABN	Active	John	Testuser	helke.layou@worldline.com	17-sep-2015		[Icons]

Display 10 1 to 1 of 1

Confirmation

The update was successful.

Search user - Detail view

Username: heltestABNUser First name: John Creation Date: 16/09/2015 09:12:36 PM

Role: BackofficeViewUserABN Last name: Testuser Blocking Date:

State: Active Language: en Lastupdate Date: 21/09/2015 09:57:52 AM

Email: John.Testuser@ABNTest.com Expiry Date: 17/07/2017

Description: Testuser for Documentation of the ABN User Management

Edit user Delete user Reset Password Block user

Figure 39: Detail view of the edited user data

5.5.4 Delete User

Use the button **DELETE USER** in the action area of the user result list or in the user's detail page to delete an active user: The user detail data are loaded from the system database and displayed in only view mode on the screen, in order to give information on the user, who is going to be deleted. As describe above, also here the result list table is still visible on the page:

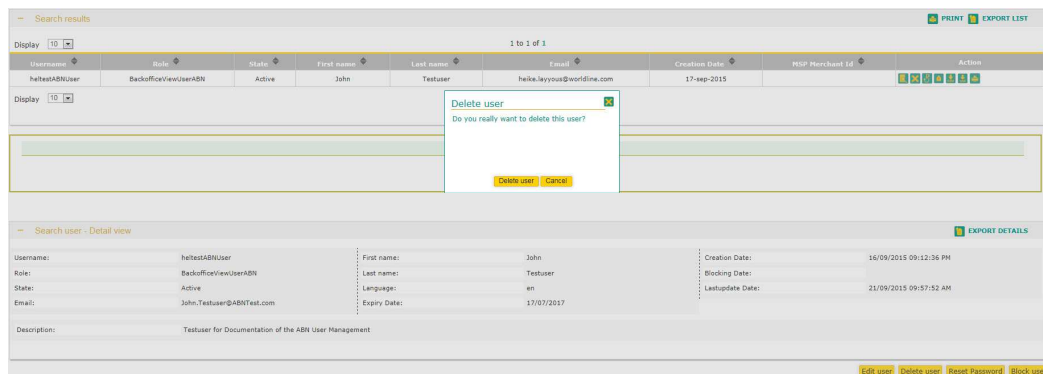


Figure 40: Screen with user data and confirmation window

A confirmation window shows the question "Do you really want to delete this user?" Now you can use the buttons

Delete user to remove the user data from the system database. In the same time the deletion process is written to the log table in the data base or **Cancel** to close the confirmation window and the delete dialog.

5.5.5 Block / Unblock User

Use the button **Block user** in the action area of the user result list or in the user's detail page to block an unblocked user or use the button **Unblock user** to unblock a blocked user. The user detail data are loaded from the system database and displayed in only view mode on the screen, in order to give information on the user, who is going to be blocked or unblocked. As described above, also here the result list table is still visible on the page:

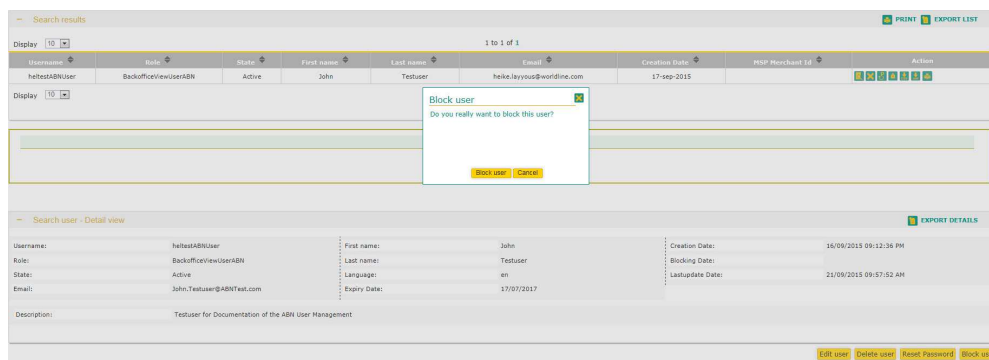


Figure 41: Screen with user data and confirmation window

A confirmation window shows the question “Do you really want to block/unblock this user?”

Now you can use the buttons

Block user / Unblock user to change the state of the user from blocked to unblocked, or from unblocked to blocked in the users data in the system database and in the same time this process is written to the log table in the data base. The user data detail view is re-displayed on the screen, containing an information on successful update.

Cancel to close the confirmation window and the block / unblock dialog.



Confirmation

The update was successful.

Detail view

Username:	Backoffice_User	First name:	Name	Creation Date:	26/10/2014 09:00:00 PM
Role:	BackofficeUserAbn06L	Last name:	Vorname	Blocking Date:	
State:	Active	Language:	en	Lastupdate Date:	24/06/2015 12:01:13 PM
Email:	email@email.de	Expiry Date:			
Description:	User Mgmt test user				

[Edit user](#) [Delete user](#) [Reset Password](#) [Block user](#)

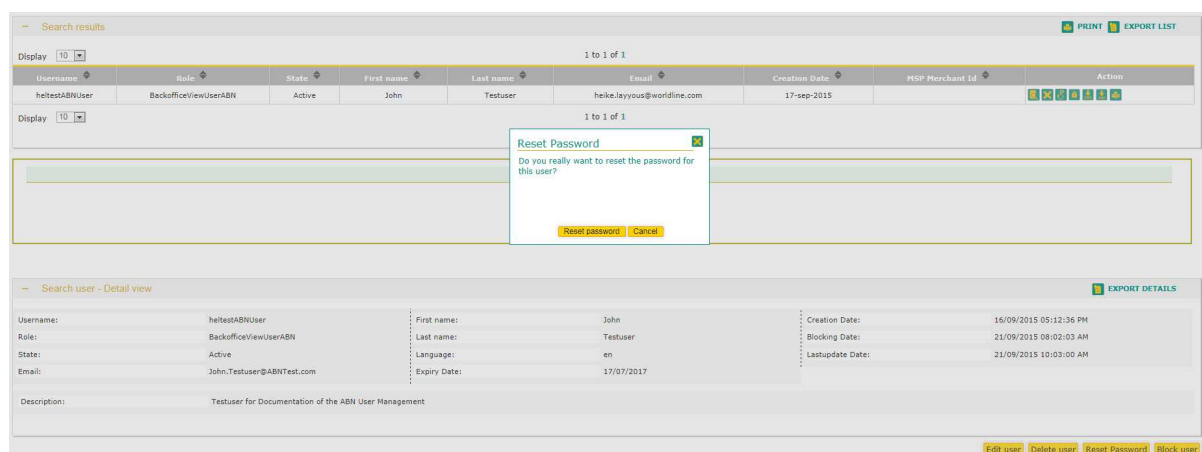
Figure 42: Information on successful update

Finally a system message informs you about the result of the block / unblock process.

5.5.6 Reset Password

Use the button **Reset Password** in the action area of the user result list or in the user's detail page to reset the current password of a selected user.

The user detail data are loaded from the system database and displayed in only view mode on the screen, in order to give information on the user, whose password is going to be resetted. As described above, also here the result list table is still visible on the page:



Search results

Display: 10 | 1 to 1 of 1

Username	Role	State	First name	Last name	Email	Creation Date	MSP Merchant Id	Action
heltestABNUser	BackofficeUserABN	Active	John	Testuser	heike.layous@worldline.com	17-sep-2015		Edit Delete Reset Password Block

Display: 10 | 1 to 1 of 1

Reset Password

Do you really want to reset the password for this user?

[Reset password](#) [Cancel](#)

Search user - Detail view

Username:	heltestABNUser	First name:	John	Creation Date:	16/09/2015 05:12:36 PM
Role:	BackofficeUserABN	Last name:	Testuser	Blocking Date:	21/09/2015 08:02:03 AM
State:	Active	Language:	en	Lastupdate Date:	21/09/2015 10:03:00 AM
Email:	John.Testuser@ABNTest.com	Expiry Date:	17/07/2017		
Description:	Testuser for Documentation of the ABN User Management				

[Edit user](#) [Delete user](#) [Reset Password](#) [Block user](#)

Figure 43: Screen with user data and confirmation window

A confirmation window shows the question “Do you really want to reset the password for this user?” and includes the following buttons:

Reset password to start the password renewal process or **Cancel** to close the confirmation window and reset password dialog.

After clicking the button **Reset password** the system automatically generates an eMail to the eMail address stored for the selected user. In the GUI the current Email address is displayed in the according field. If it is valid, the selected user will receive a notification, containing a link to the page where he can enter his new password. If you want to renew your own password, please use the menu item MyProfile (see chapter 6 MyProfile).

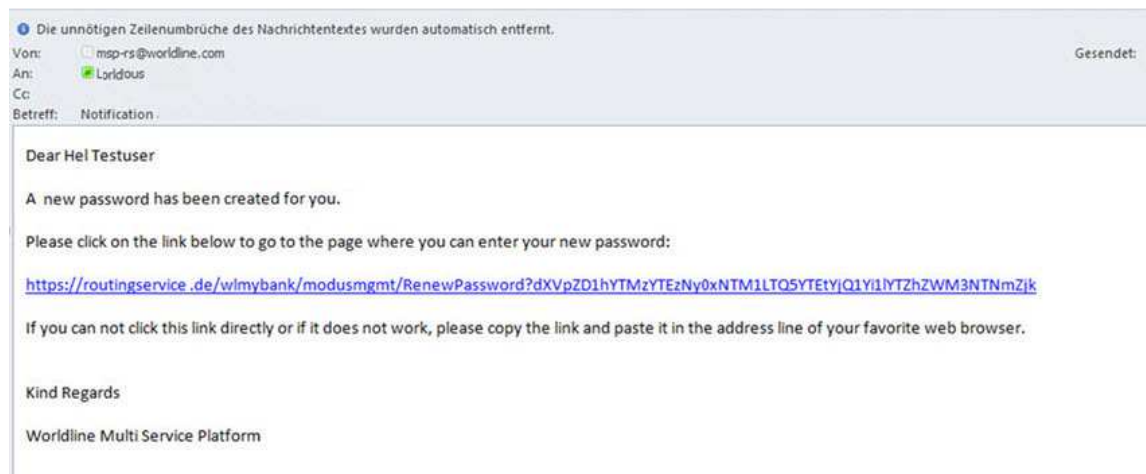


Figure 44: Notification with link to RenewPassword Form



Figure 45: Input data New Password

If the selected user follows the link sent to him via Email, he can use the input fields to insert a new password and repeat it in the according field twice. It is important to make use of the password rules, viewable after clicking the blue question mark button.

It is important to select an unique password, not one which is already in use in another context or has been used before.

After clicking the button **Save**, the system starts the validation process as follows:

- Both passwords must be identical.
- The new password must match the valid password rules.

After successful validation the new password will be stored in the system database. In the same time the event is written to the data base log table.

The user data detail view is re-displayed on the screen, containing an information on successful update.

5.6 Create New User

After selecting the sub menu item via the link **Create User**, a new screen is displayed, including all needed textfields and selectable list box entries to define a new user profile as follows:

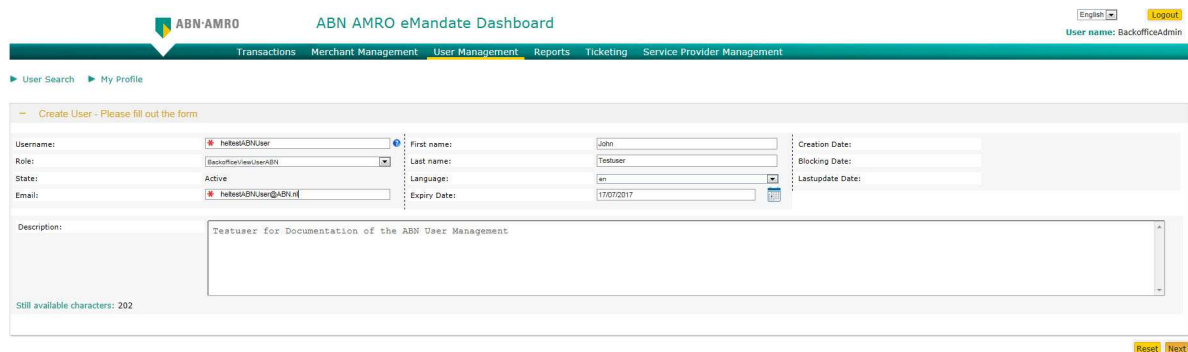


Figure 46:Create New User

The following table includes all displayed data fields and points out, which fields are editable and which not.

Username*	The user alias name must be unique - alphanumerical input field
Role	Selectable predefined role from the list box, which is assigned to the edited user. Only one role is selectable.
State	Selectable form the list box
Email*	This field should be filled with a valid Email-address of the user (The format must be a regular expression).
Description*	Field my include additional information – alphanumerical input field
Still available characters	Information about the number of remaining characters concerning the input of the field "description".
First Name*	Includes the user's first name - alphanumerical (The format must be a regular expression)
Last Name*	Includes the user's last name - alphanumerical (The format must be a regular expression)
Language	Predefined language setting selectable from the list box
Expiry Date	If relevant - selectable via data picker element

Creation Date	The creation date is generated automatically and set to current date by the system
Blocking Date	The blocking date is generated automatically by the system, during the creation process it will be set to "null", if the user is going to be blocked, it will be filled with the date and time of blocking.
Last Update Date	The data is generated automatically and set to the current date by the system.

*Data fields with defined validation rules

At the bottom of the form, you'll find two buttons: **CANCEL** and **NEXT**.

Use the button **CANCEL** to go back to the read-only detail view of the user data. If you have finished your inputs click the button **NEXT**. The system will start a validation on all entries for which validation rules have been set (fields marked with an asterix) If the validation was not successful, the page will be re-displayed in order to fill the field entries again. Incorrect inputs or empty mandatory fields, which did not pass the validation, are marked in red colour:

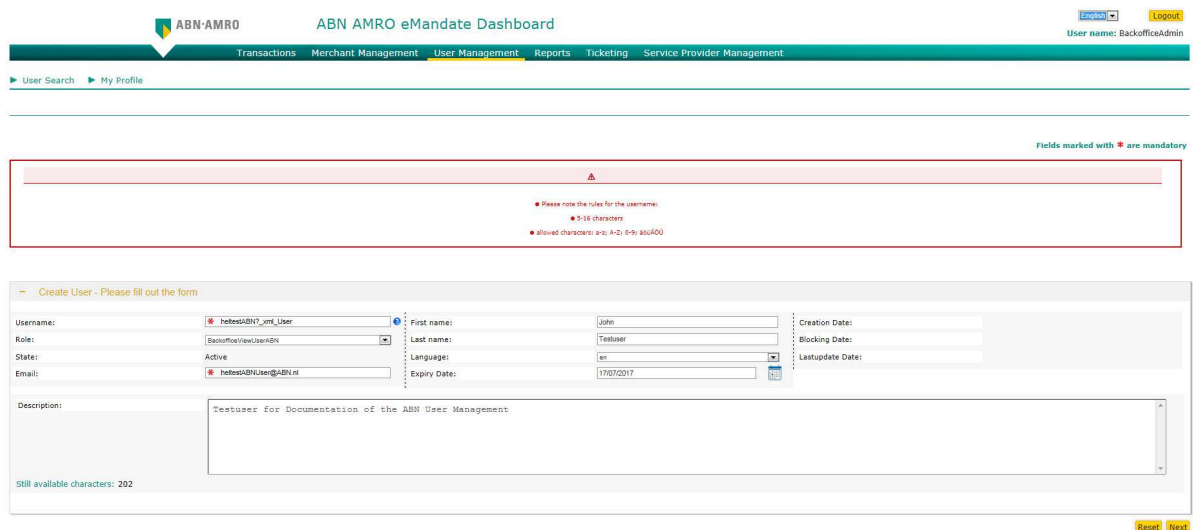


Figure 47: Create User form after failed validation process

If the validation was successful, the create user page will be re-displayed in read-only view (check) for confirmation:

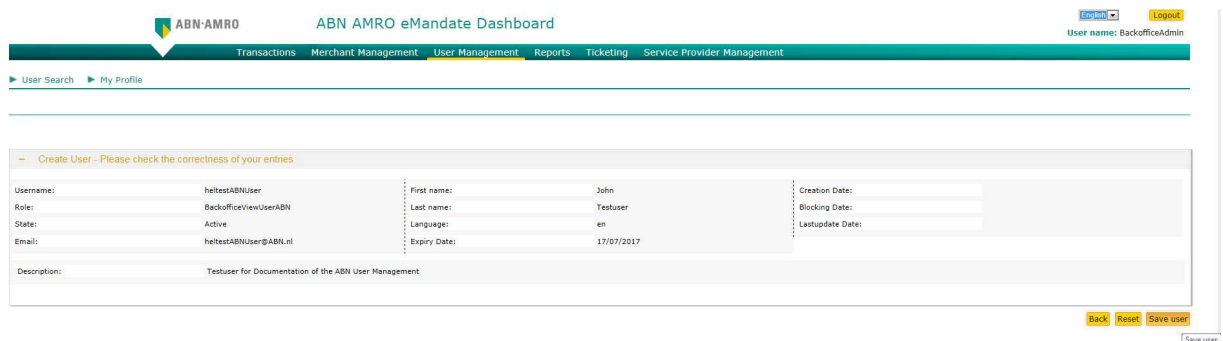


Figure 48: Check your modifications

Use the buttons at the bottom of the form to perform the following actions:

BACK: Re-displays the create user page, which includes your last inputs in order to modify or add data.

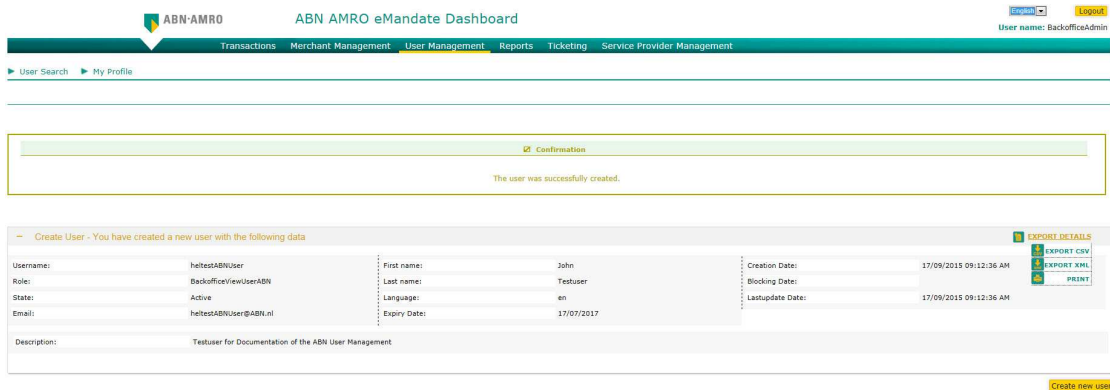
RESET: Switch back to the empty creation page.

SAVE USER: Perform additional validations (of the server). After successful validation a message is displayed on the screen, which informs you about the successful creation of a new user.

Finally the user details view is displayed on the screen, including all data of the created user.

All entered data will be stored in the system database and in the same time an Email notification is sent to the new user. It includes a link to the password renewal page, where the new user has to enter the new password.

How to set the new password describes chapter 5.2 Forgotten Password



The screenshot shows the 'ABN AMRO eMandate Dashboard' with a navigation bar including 'Transactions', 'Merchant Management', 'User Management', 'Reports', 'Ticketing', and 'Service Provider Management'. The 'User Management' section is active, showing 'User Search' and 'My Profile' links. A confirmation message states: 'The user was successfully created.' Below this, a 'Create User' summary box displays the following details:

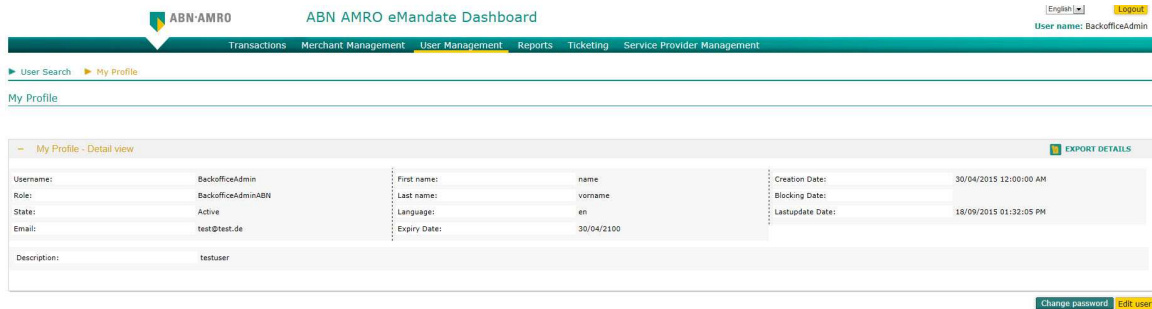
Create User - You have created a new user with the following data			
Username:	heltesABNUser	First name:	John
Role:	BackofficeViewUserABN	Last name:	Testuser
State:	Active	Language:	en
Email:	heltesABNUser@ABN.nl	Expiry Date:	17/07/2017
Description:	Testuser for Documentation of the ABN User Management		
Creation Date:	17/09/2015 09:12:36 AM		
Blocking Date:			
Lastupdate Date:	17/09/2015 09:12:36 AM		

On the right side of the details box, there are links for 'EXPORT DETAILS', 'EXPORT CSV', 'EXPORT XML', and 'PRINT'. A 'Create new user' button is located at the bottom right of the dashboard.

Figure 49: Detail view of the new user

6 MyProfile

After selecting the sub menu item **MyProfile**, the profile details of the active user are displayed on the screen:



My Profile - Detail view		EXPORT DETAILS	
Username:	BackofficeAdmin	First name:	name
Role:	BackofficeAdminABN	Last name:	vorname
State:	Active	Language:	en
Email:	test@test.de	Expiry Date:	30/04/2100
Description:	testuser	Creation Date:	30/04/2015 12:00:00 AM
		Blocking Date:	
		Lastupdate Date:	18/09/2015 01:32:05 PM

Change password Edit user

Figure 50: Startscreen tab MyProfile

The detail view contains the following user data, all shown in read-only mode:

- Alias
- Role
- State
- Email
- Description (Detail description of the selected user)
- First name
- Last name
- Language
- Expiry Date
- Creation Date
- Blocking Date
- Last update Date

Using the buttons on the bottom of the **Detail View** you can perform the following actions:

Edit User: See chapter 6.1

Change Password: See chapter 6.2

6.1 Edit Profile

Use the button **Edit user** on the bottom of the Detail View to modify your personal data:

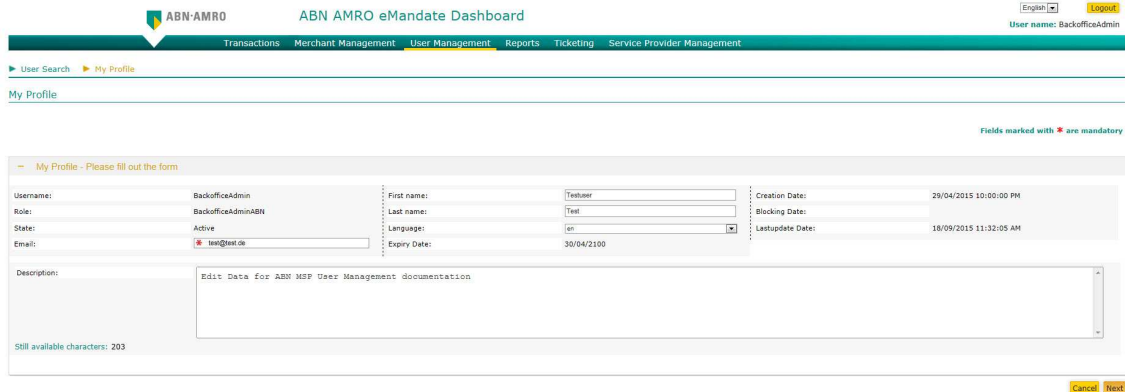


Figure 51: Edit Profile

The following table includes all displayed data fields and points out, which fields are editable and which not.

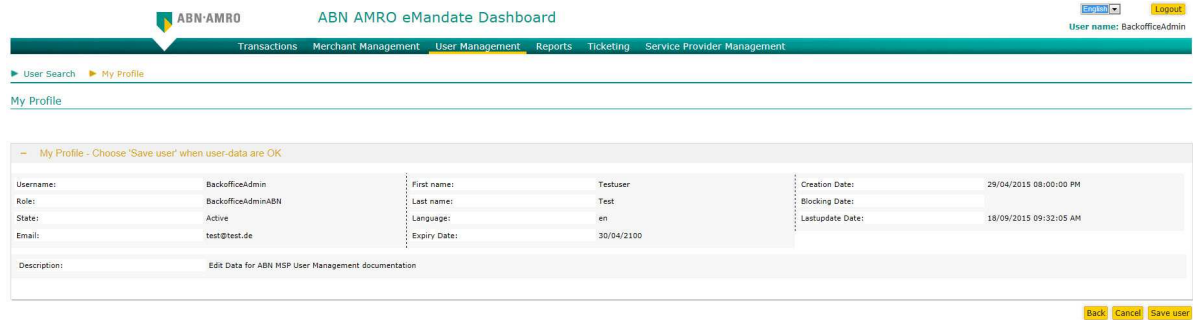
Username	Not editable – Alphanumeric field
Role	Editable predefined role from the list box, which is assigned to the edited user.
State	Not editable in this form
Email*	Editable (The format must be a regular expression)
Description*	Editable (The user can insert additional information)
Still available characters	Information about the number of remaining characters concerning the input of the field "description".
First Name*	Editable: Alphanumeric (The format must be a regular expression)
Last Name*	Editable: Alphanumeric (The format must be a regular expression)
Language	Editable: predefined language setting selectable from the list box
Expiry Date	Editable: Selectable via data picker element
Creation Date	Not Editable: The creation date is generated automatically by the system
Blocking Date	Not Editable: The blocking date is generated automatically by the system in the time when the user is blocked.
Last Update Date	Not Editable: The data is generated automatically by the system.

*Data fields with defined validation rules

At the bottom of the form, you'll find two buttons: **CANCEL** and **NEXT**.

Use the button **CANCEL** to go back to the read-only detail view of your profile. When your modifications have been completed click the button **NEXT**. The system will start a validation on all entries for which validation rules have been set (fields marked with an asterix) If the validation was not successful, the page will be re-displayed in order to edit the field entries again.

If the validation was successful, the edit page will be re-displayed in read-only view for confirmation:



ABN-AMRO ABN AMRO eMandate Dashboard

Transactions Merchant Management **User Management** Reports Ticketing Service Provider Management

User Search My Profile

My Profile

My Profile - Choose 'Save user' when user-data are OK

Username:	BackofficeAdmin	First name:	Testuser	Creation Date:	29/04/2015 08:00:00 PM
Role:	BackofficeAdminABN	Last name:	Test	Blocking Date:	
State:	Active	Language:	en	Lastupdate Date:	18/09/2015 09:32:05 AM
Email:	test@test.de	Expiry Date:	30/04/2100		
Description:	Edit Data for ABN HSP User Management documentation				

Back Cancel Save user

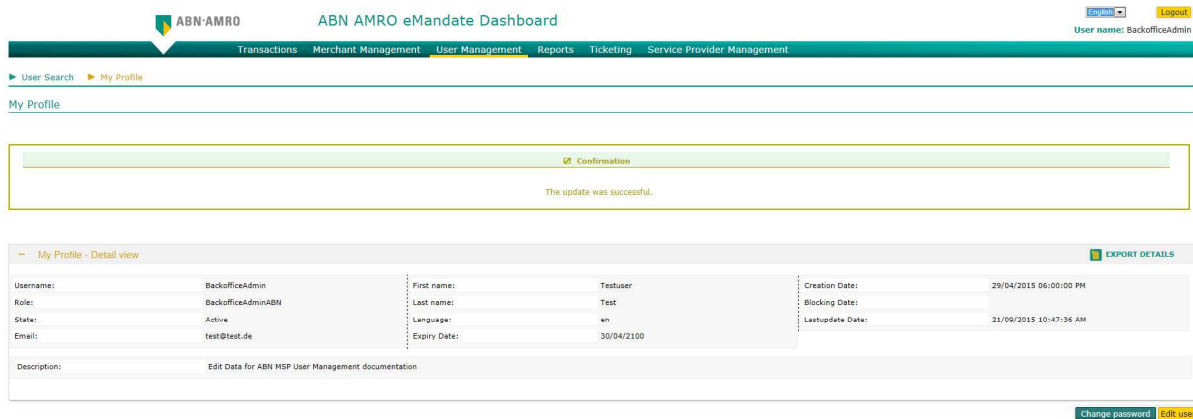
Figure 52: Check your modifications

Use the buttons at the bottom of the form to perform the following actions:

BACK: Re-display the edit page, which includes your last changes in order to make additional modifications.

CANCEL: Switch back to the edit page, which is resetted to its initial setting.

SAVE USER: Perform additional validations (of the server). After successful validation a message is displayed on the screen, which informs you about a successful data modifications of the edited user. The changes will be stored in the system database and the edit process will be written to the log table. Finally the updated user details view is displayed on the screen:



ABN-AMRO ABN AMRO eMandate Dashboard

Transactions Merchant Management **User Management** Reports Ticketing Service Provider Management

User Search My Profile

My Profile

Confirmation

The update was successful.

My Profile - Detail view

Username:	BackofficeAdmin	First name:	Testuser	Creation Date:	29/04/2015 06:00:00 PM
Role:	BackofficeAdminABN	Last name:	Test	Blocking Date:	
State:	Active	Language:	en	Lastupdate Date:	21/09/2015 10:47:36 AM
Email:	test@test.de	Expiry Date:	30/04/2100		
Description:	Edit Data for ABN HSP User Management documentation				

EXPORT DETAILS

Change password Edit user

Figure 53: Updated user details view with notification message

6.2 Chance Password

Use the button **Change password** on the bottom of the profile details form to modify your current password:

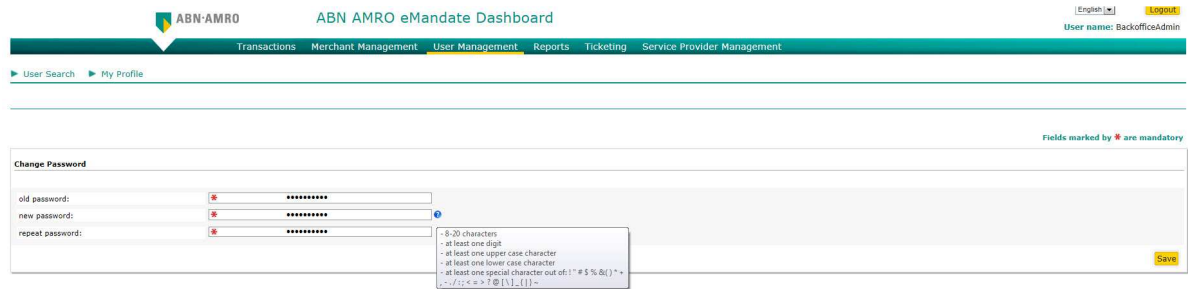


Figure 54: Change Password

As you can see in the illustration the **Change Password** form includes three editable text input fields:

Old Password: Please insert your currently applicable password.

New Password: Please enter a new password, according to the password rules.

Repeat New Password: Please repeat the new password correctly.

Please note: The new password should have between eight and twenty characters, at least minimal one of these:

- lowercase letters
- uppercase letters
- numerals
- special characters²

It must not be a word or simple phrase or containing numbers in ascending or descending order and it is important to select an unique password, not one which is already in use in another context or has been used before.

After clicking the button **Save**, the system starts the validation process as follows:

- Both passwords must be identical.
- The new password must match the valid password rules.

After successful validation the new password will be stored in the system database. In the same time the event is written to the data base log table.

The user data detail view is re-displayed on the screen, containing an information on successful update.

² Have a look at the help window in the illustration.

7 Remarks and Further Applicable Documents

7.1 Remarks

Not applicable

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