Corporate Moneyline

User Guide – Access to information

This module of the application allows the User to manage access to the pension information. The guide will assist users how to best use the application to assign access to various users at different levels.

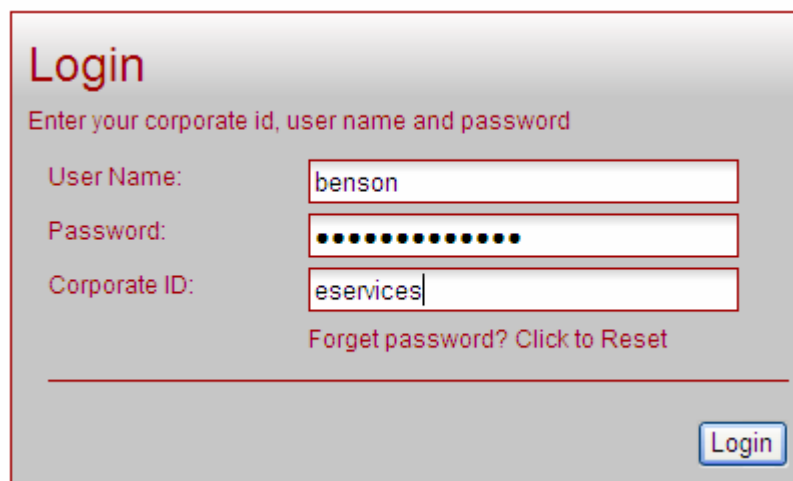# Corporate Moneyline

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Getting Started

Logging in for the first time

When a User accesses the application the following login screen is displayed.

He is prompted to enter his:
- User name
- Password (this password would have been sent to him through email)
- Corporate ID

If the user is logging in for the first time he will be prompted to:

a) **Change the Password as shown below:**

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Change Password

You are required to change your password

Old Password: ●●●●●●●●●●●●●

New Password: ●●●●●●●●●●

Retype New Password: ●●●●●●●●●●

Logout | Change

NB. Passwords must meet the following requirements

The password should meet the following:
- Be at least eight (8) characters in length
- Should not have been used in the last 5 password changes on your account
- Must contain any three of the following
  - At least one lower case character (a-z)
  - At least one upper case character (A-Z)
  - At least one numeric character (0-9)
  - At least one special character

Where the User enters an invalid Password the following message will appear on screen and the User is allowed to re-enter the information.

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Change Password

You are required to change your password

Missing or password mismatched:
New Password, Retype Password

Old Password:

New Password:

Retype New Password:

Logout | Change

b) *Create Security Questions*

After a Valid new Password as been entered and retyped then the User is prompted to Update/Create the security questions that will be asked at the time of Password reset.

The application provides a list of question from which the User may select his/her question to which he will provide the answers.

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Update Security Question

You are required to update your security questions

First Question:

What was the make of your first car

Your Answer:

Second Question:

Your Answer:

Third Question:

Your Answer:

Fourth Question:

Your Answer:

What was the make of your first car
What was your childhood nickname
In what city parish did you meet your spouse significant ot
What is the name of your favorite childhood friend
What street did you live on in third grade
What is your oldest sibling's birthday month and year (e.g.
What is the middle name of your youngest child
What is your oldest sibling's middle name
What school did you attend for sixth grade
What was your childhood phone number including area co
What is your oldest cousin's first and last name
What was the name of your first stuffed animal
In what city or town did your mother and father meet
What is the first name of the boy or girl that you first kisse
What was the last name of your third grade teacher
Where does your nearest sibling live
What is your youngest brother's birthday
What was the name of your elementary primary school
What is your maternal grandmother's maiden name
In what city or town was your first job

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Please note that each Question may only be used once: If the Uses a security question more than once a message similar to the one circled below will appear and the User must correct the problem.

Update Security Question
You are required to update your security questions

Missing Fields or Invalid input:
Question #3 already in use

First Question: What was the make of your first car
Your Answer: honda

Second Question: What is the name of your favorite childhood friend
Your Answer: honda

Third Question: What was the make of your first car
Your Answer: honda

Fourth Question: In what city or town was your first job
Your Answer: honda

Logout | Update

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An example of a valid set of Security Question is shown below:

Logout

This option gives the User to opportunity to officially log out of the application by clicking this option.

NB. If the Application sits idle for a period, the system will terminate the logged in User forcibly.

Change Password

The User is allowed to change his/her password using the Change Password option: He is required to enter the Old password and then type in the New Password. To ensure that the password entered is remembered the user is required to retype the New Password.

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Where the password does not meet the requirements the following information will be shown on the screen which will inform the User has how to create a password that meets the requirements.

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NB. All passwords must meet the following requirements

Change Password

Please enter your old and new password

Update Failed:

Password does not meet the minimum requirements.
The password should meet the following:

- Be at least eight (8) characters in length
- Should not have been used in the last 5 password changes on your account
- Must contain any three of the following
  - At least one lower case character (a-z)
  - At least one upper case character (A-Z)
  - At least one numeric character (0-9)
  - At least one special character

Old Password: ●●●●●●●●

New Password: ●●●●●●●●●

Retype New Password: ●●●●●●●●●

Cancel | Change
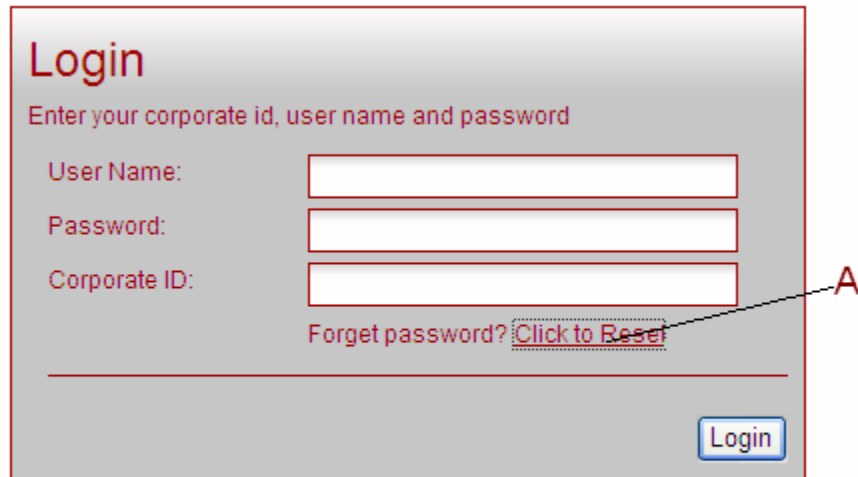
When a valid password is entered the information will be saved (no message will appear).

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Resetting Password (at Login)

In the circumstances where a User has forgotten their password and requires a password reset he may click on the link highlighted at 'A' below.
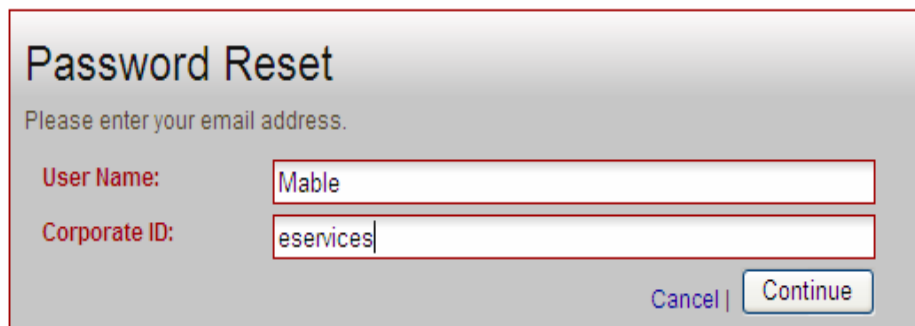

After clicking the 'Click to Reset' link the following screen will appear and the User is requested to enter the following information and then click the 'Continue' button:

- o User Name
- o Corporate Id:

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After entering valid information the Password Reset process is continued with the request of answers for the security questions provided by the User.

If the answers to the security questions are invalid the following message as shown circled below will appear and the User must correct the answers before he will be allowed to proceed.

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Password Reset

Please enter your email address.

Update Failed:
Responses do not correspond to expected answers

User Name:	Mable
Corporate ID:	eservices

Please enter security questions below.

First Question: What was the make of your first car
Your Answer: honda

Second Question: What is the name of your favorite childhood friend
Your Answer: honda1

Third Question: What is your maternal grandmother's maiden name
Your Answer: honda

Fourth Question: In what city or town was your first job
Your Answer: honda

Cancel | Reset Password

Once valid answers are provided the password will be reset when the
'Reset Password' button is clicked.

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User Administration

Adding/Creating a single User

To add a User click on the 'Add User' button on the User Administration Screen.

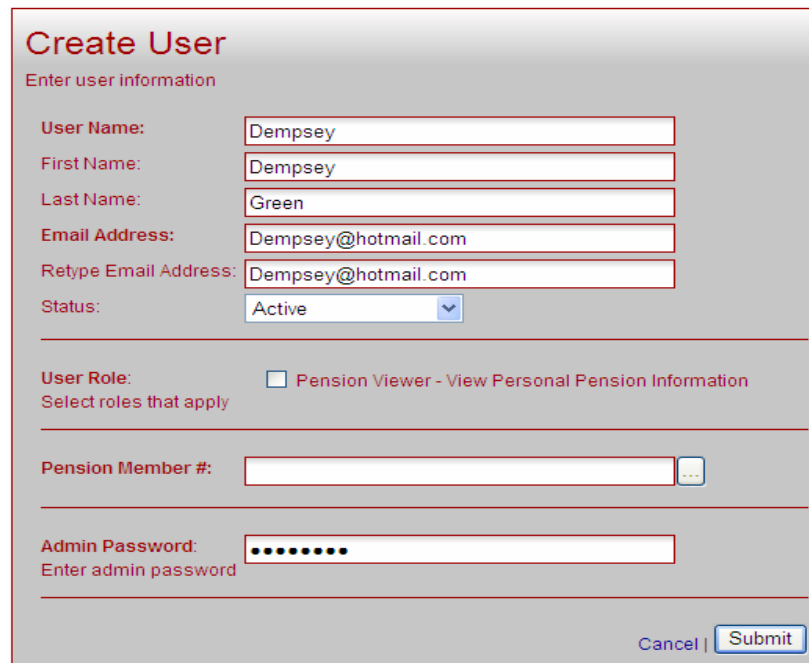After the User has clicked the 'Add User' button the following **Create User** screen will appear:

The User is required to enter all of the following information:

- User Name
- First Name
- Last Name
- Email Address (This address should be unique to the User being created)
- Status of the User Login Account (Defaults to Active)
- User Role (check box) states whether the User may View his Personal Pension Information

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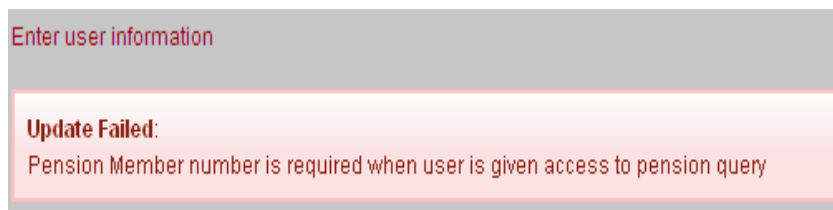- Enter the Admin Password

Create User

Enter user information

User Name:	Dempsey
First Name:	Dempsey
Last Name:	Green
Email Address:	Dempsey@hotmail.com
Retype Email Address:	Dempsey@hotmail.com
Status:	Active

User Role:
Select roles that apply
☐ Pension Viewer - View Personal Pension Information

Pension Member #: [ ]

Admin Password:
Enter admin password
••••••••

Cancel | Submit

NB. Where the **User Role** is checked and a pension member was not selected the following message will appear.
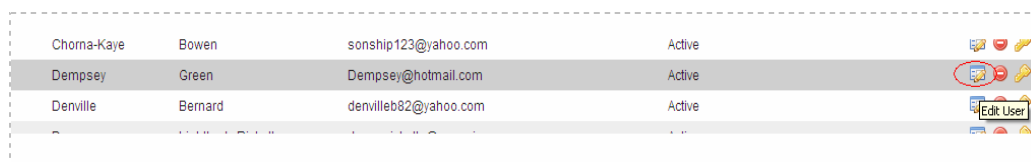
Enter user information

Update Failed:
Pension Member number is required when user is given access to pension query

NB. When a User is created an email message will be sent to advise him of his temporary password which must be changed at first log in. See Logging in for the First Time.

Changing a User Status (Active, Inactive, Locked, Unlock)

To make a User inactive click on the edit button to the right of the User name highlighted with circle.

Chorna-Kaye	Bowen	sonship123@yahoo.com	Active	
Dempsey	Green	Dempsey@hotmail.com	Active	
Denville	Bernard	denvilleb82@yahoo.com	Active	Edit User

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Editing a User

The following **Edit User screen** will appear and the logged in user may select the status from the dropdown list associated with Status.

Deleting a User

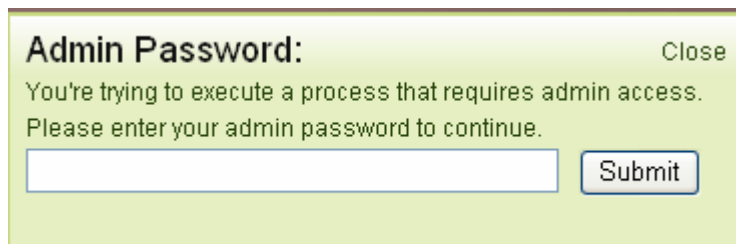To delete a user the logged in user must have Administration rights.

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To delete a user click on the delete icon (circled above)' and the user will be prompted to confirm the deletion with the following prompt.
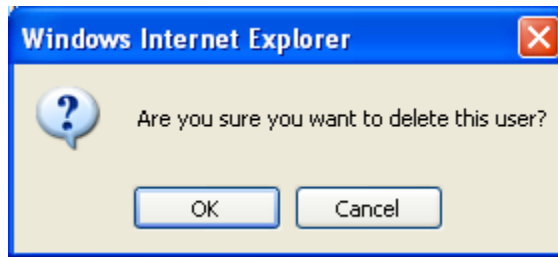

Click '**OK**' if you wish to continue with the process or '**Cancel**' to terminate the process.

If the user clicked 'OK' he will then be prompted to enter the Administration Password as the process requires said information.
Click the 'Submit' button after password is entered.

Where a invalid password is entered the following message will appear and the user is required to re-enter the password.
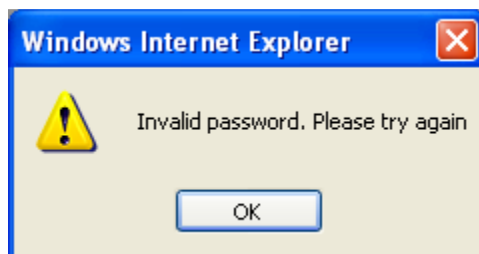
When a valid password is entered the delete process will be completed (note no message will appear to confirm this) and the deleted information will not be shown in the listing.

Searching for a User

This feature allows the user to search the following headings by using the information entered:

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> ➢ User Name
> ➢ First Name
> ➢ Last Name
> ➢ Email

For example: By entering 'th' and hitting the Search button highlighted at **"A"** below, all of the above mentioned columns containing information that include the letters 'th' will be displayed.

If the User adds 'omas' you can further restrict the search results to showing only information relating to 'Thomas'.