

User Administration User Guide

October 2008

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Revisions, October 2008

Section	Description
Service Requests Report, page 35.	Removed User Inactivity Report.

Revisions August 2008

Section	Description
Service Requests Report, page 35.	Updated reports search feature.

Introduction

Overview

User Administration is a security system that allows you to manage your institution's user security records and tokens. It gives you a clear view of each user's access and allows you to add user records tailoring access to job functions.

Page Recap

The following table highlights User Administration pages covered in this document.

Page	Description
User Administration	Allows you to open the User Administration application in a new window.
User Administration—Choose User	Provides a search feature that you can use to locate user security records. It allows you to add, view, update, or delete user security records.
User Administration—User Summary	Displays the security record of an existing user.
User Administration—User Details	Allows you to specify basic information related to a user.
User Administration—Logos	Allows you to specify logos that a user may access in CWSi.
User Administration—Applications	Allows you to specify application access for a user.
User Administration—Access Rights	Allows you to specify application access rights granted to a user.
User Administration—Special Roles	Allows you to specify special roles for a user.
User Administration—Availability	Allows you to specify access times for a user.
User Administration—Tokens	Allows you to specify token issuance information.
User Administration—User Record	Allows you to save the user record based on the information you have supplied.

User Administration Application

Overview

CWSi User Administration is a security system that allows you to manage your institution's user security records and tokens. It gives you a clear view of each user's access and allows you to add user records tailoring access to job functions. It also helps you manage users and token requests by allowing you to submit changes online and monitor their progress on the Service Request report (see [Service Requests Report, page 35](#)).

Administrators

CWSi User Administration is a security system that allows administrators to set up and maintain user access to applications on the EFT website.

- An administrator is a user who has any combination of read, add, update, and delete access to the User Administration application.
- The primary security administrator (PSA) has the highest level of access to all applications available to your institution, and is identified on the User Summary page as *Primary Administrator: Yes*.
- Your institution can have only one PSA and should have at least one administrator as a backup.
- The PSA can only be added, updated, or deleted by an EFT security administrator. The PSA creates administrators by giving them access to the User Administration application. The PSA is the only user in your institution with the authority give that access or to manage other administrators.
- PSAs must use their tokens regularly to avoid losing access due to inactivity.

- The PSA and administrators set up and maintain all user access to applications used by your institution. They must have access to the applications themselves before they can give access to other users.
- When your institution purchases a new application, EFT will give access to the PSA, who can then give it to the other users in your institution.

Tokens

A token is an electronic device that generates a sequential number called a key. This key is required to log on to Client-Central. Following is important information regarding tokens:

- Each user must have a token to access Client-Central. A token identifies a unique user and is not shared between users.
- Your institution is solely responsible for the use or misuse of tokens. It is also solely responsible for establishing the extent and effectiveness of the institution's security administration program for access to Client-Central.
- A token can be reassigned to a new user. User Administration allows token reassignment when adding a new user.

If a token is reassigned to a new user, the personal identification number (PIN) must be changed. The original user must do the following:

- Type the PIN.
- Press the **ON** button.
- Press the **MENU** button until CHANGE PIN displays.
- Press the **ON** button, and then pass the token to the new user.
- The new user types a new PIN.

Contact your client services representative if you require any further information.

- A lost, stolen, or defective token can be replaced. User Administration allows you to request a token replacement by updating a user security record.

See [Administering User Security Records, page 12](#) for the process of ordering, reassigning, and replacing a token.

Timeframes

To review the status of a token request and other administrative tasks, select Request Status under the Reports tab. The Completion Date indicates the token shipping date if one has been requested. This report contains request information for all open requests and requests completed in the past 30 calendar days.

New Users

An anticipated timeframe of 7 business days is required to complete the necessary functions in order for a new user to access Client-Central. A token is shipped on completion of necessary functions. Transit duration for the token depends on the mode of shipping.

Existing Users

The following table contains anticipated timeframes for existing Client-Central users. The timeframes apply only if accurate information is provided. Incomplete or incorrect information results in a delay.

Type of Service	Application	Timeframe
New services	CWSi applications	Effective immediately.
	ClientView internet (CVi)	7 business days
	Premier Services	7 business days
	CardTracker	7 business days
New applications	CWSi applications	Effective immediately
	Message Board	Effective immediately
Update access rights	CWSi applications	Effective immediately
	CVi	7 business days
	Premier Services	7 business days
	CardTracker	7 business days
Token replacement	Client-Central	7 business days

Deletion of a Client-Central user security record takes effect immediately and the user can no longer access Client-Central.

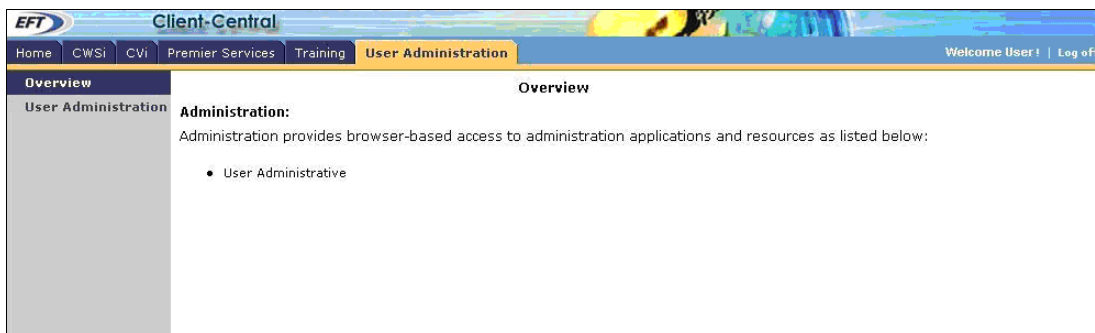
Pricing

An authorized service request is submitted with the implementation of Client-Central for your institution. The service request defines the pricing structure for your institution. By accepting the statement Charges will apply as set forth in your Client-Central pricing documentation while adding, updating, or deleting users in User Administration, you confirm that all relevant Client-Central pricing as defined for your institution is acceptable. For further information contact your client services representative.

Access User Administration

You must have at least read access to the User Administration application. To access User Administration, perform the following.

- Step 1 Log on to Client-Central (see the *EFT User Manual, Getting Started*). The Client-Central home page appears.
- Step 2 Click the **User Administration** tab. The Overview page appears.



- Step 3 Click **User Administration** in the navigation column. The Choose User page appears.

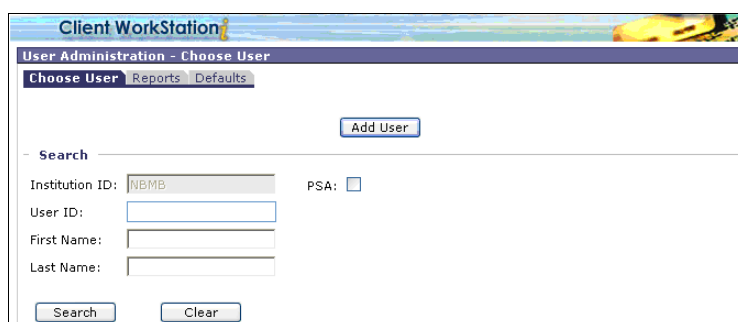
The screenshot shows the 'Client WorkStation' window titled 'User Administration - Choose User'. It has three tabs: 'Choose User' (selected), 'Reports', and 'Defaults'. There is an 'Add User' button at the top right. Below it is a 'Search' section with a search bar. The search criteria include: 'Institution ID' with a dropdown menu showing 'NBMB', 'PSA' with an unchecked checkbox, 'User ID' with a text input field, 'First Name' with a text input field, and 'Last Name' with a text input field. At the bottom are 'Search' and 'Clear' buttons.

From here you can search, view, add, update, and delete user security records of the Client-Central users associated with your institution.

Accessing User Security Records

To view details of a user security record, perform the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.



Step 3 Click **Search**. Results display in table format on the Choose User page. Each row represents a user security record.

Client WorkStation

User Administration - Choose User

Choose User Reports Defaults

Add User

Search

Institution ID: NBMB PSA: ☐

User ID:

First Name:

Last Name: doe

Search Clear

Results

User ID	First Name	Last Name	Disabled	Days Inactive	Create Date/Time	Last Login Date/Time
48doe0	Jackson	Doe	No	0	06-10-2008 16:43:02 EDT	
48doej	Jane	Doe	No	0	06-10-2008 16:35:49 EDT	

Records found: 2

Print View User Manage User Copy User

Step 4 Select a record and click **View User**. The User Summary page appears.

Client WorkStation

User Administration - User Summary

Choose User **Selected User** Reports Defaults

Key Information

First Name: **Jane** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doej**

User Details

User ID: **48doej**
 First Name: **Jane** Last Name: **Doe**
 Institution ID: **NBMB** Group/User: **48/35**
 Primary Administrator: **No**

Networks Only: **False** Audit Rpt. Institution:

Institution: **Fiserv Inc.**
 Address: **250 Johnson Rd.**
Mailstop 233
USA
 City: **Morris Plains** State: **NJ** ZIP: **11111**
 Phone: **973-555-2618** Ext: Fax: **973-555-2600**
 Email: **NOEMAIL@NOT.COM**

Date Created: **06-10-2008 16:35:49 EDT** Date Last Login:
 Date Last Modified: **06-10-2008 16:35:49 EDT** By: **48ral**

Token Information

Token Serial Number: **Token not assigned**

Applications

Application	Permissions	Read	Add	Update	Delete
Transaction Journal	Transaction Journal Report	X	--	--	--
Institution	Institution Definition File	X	--	X	--
Premier Manager*	Premier Manager	X	--	--	--

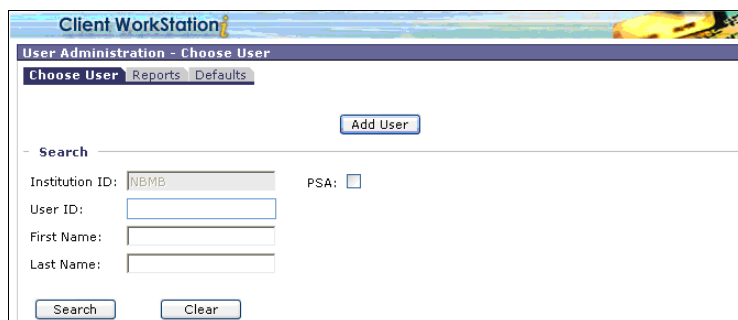
Administering User Security Records

Administrators must have add, update, and delete access in User Administration to manage other users' security records accordingly. This section explains the process of adding, copying, updating, and deleting user security records.

Add User

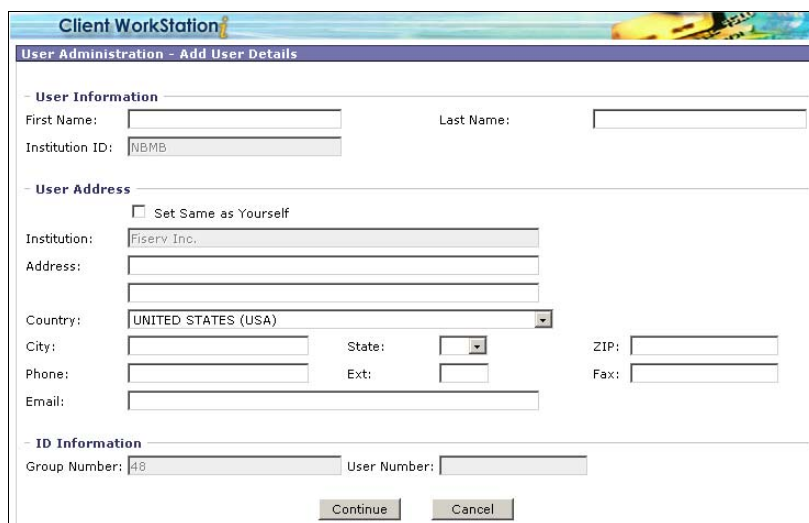
To add a new user, perform the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



The screenshot shows the 'Client WorkStation' interface with the 'User Administration - Choose User' window. The window has tabs for 'Choose User', 'Reports', and 'Defaults'. An 'Add User' button is located at the top right. Below it is a 'Search' section with a search bar. The search criteria include: Institution ID (set to 'NBMB'), User ID (empty), First Name (empty), Last Name (empty), and a 'PSA' checkbox (unchecked). 'Search' and 'Clear' buttons are at the bottom of the search section.

- Step 2 Click **Add User**. The Add User Details page appears.



The screenshot shows the 'Client WorkStation' interface with the 'User Administration - Add User Details' window. The window is divided into three sections: 'User Information', 'User Address', and 'ID Information'.
- **User Information:** Fields for First Name, Last Name, and Institution ID (set to 'NBMB').
- **User Address:** A checkbox 'Set Same as Yourself' is checked. Fields for Institution (set to 'Fiserv Inc.'), Address, Country (set to 'UNITED STATES (USA)'), City, State (dropdown), ZIP, Phone, Ext, and Fax.
- **ID Information:** Fields for Group Number (set to '48') and User Number (empty).
At the bottom are 'Continue' and 'Cancel' buttons.

Step 3 Fill in the user name, business address, and other required information.

Selecting the Set Same as Yourself option prefills the Address field with the address defined on the security record of the administrator creating this record.

The screenshot shows the 'Client WorkStation' application window with the title 'User Administration - Add User Details'. It contains three main sections: 'User Information', 'User Address', and 'ID Information'.
- **User Information:** First Name: Jane, Last Name: Doe, Institution ID: NBMB.
- **User Address:** A checkbox 'Set Same as Yourself' is checked. Below it, the address fields are pre-filled: Institution: Fiserv Inc., Address: 250 Johnson Rd., Mailstop: 233, Country: UNITED STATES (USA), City: Morris Plains, State: NJ, ZIP: 11111, Phone: 973-555-2618, Ext: (empty), Fax: 973-555-2600, Email: NOEMAIL@NOT.COM.
- **ID Information:** Group Number: 48, User Number: (empty).
At the bottom are 'Continue' and 'Cancel' buttons.

Step 4 Click **Continue**. The Add Logos page appears.

The screenshot shows the 'Client WorkStation' application window with the title 'User Administration - Add Logos'. It contains two main sections: 'Key Information' and 'Logos/Client IDs'.
- **Key Information:** First Name: Jane, Last Name: Doe, Institution ID: NBMB.
- **Logos/Client IDs:** This section has two boxes: 'Available Logos' (empty) and 'Selected Logos' (containing 'BOFN'). Between the boxes are four buttons: '>>', 'All >>', '<<', and 'All <<'.
At the bottom are 'Back', 'Continue', and 'Cancel' buttons.

Step 5 All logos associated with the user appear in the Selected Logos list box. Displayed values reflect the settings on the security record of the administrator adding the user. Move the logos that you do not want the user to access to the Available Logos list box.

Note: When a new logo is associated with your institution, your primary administrator should grant access, if applicable, to other administrators and users.

Step 6 Click **Continue**. The Add Applications page appears.

Client WorkStation

User Administration - Add Applications

Key Information

First Name: **Jane** Last Name: **Doe** Institution ID: **NBMB**

Applications

Available Applications:

Selected Applications:

>> All >> << All <<

CVI - Reports*
CWSi - Call Me
CWSi - Card Management
CWSi - Files Refresh
CWSi - Institution
CWSi - SPC
CWSi - Terminal
CWSi - Transaction Journal
Portal - Message Board
Premier Services - ATM Cardholder Preferences

* EFT Security Administrators have tasks for the applications designated by an asterisk that may take 5 or more business days to complete. The status of these tasks can be tracked on the Service Request report.

Back Continue Cancel

All relevant applications display in the Selected Applications list box except for the User Administration application which is reserved for administrators only.

Step 7 Move the applications that you do not want the user to access to the Available Applications list box. The new user must be granted access to at least one application.

Note: EFT suggests that you grant all users read access to the Message Board application.

Step 8 Click **Continue**. The Add Access Rights page appears and displays all access rights applicable to the selected applications.

Client WorkStation

User Administration - Add Access Rights

Key Information

First Name: **Jane** Last Name: **Doe** Institution ID: **NBMB**

Access Rights

Select All Clear Reset Read Only

Application: Reports*	Read	Add	Update	Delete
ClientView	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Application: Call Me	Read	Add	Update	Delete
Call Me	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Application: Card Management	Read	Add	Update	Delete
Card Definition File	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Exception File	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Account File	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create AEF/Order Cards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create CAF/Order Cards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Card Issue Screen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Card Management System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Cards/Verify Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step 9 Specify access rights for the user.

Note: To access the Card Management System (CMS) application, the user must have access to the Card Definition File (CDF). To access the Terminal application, the user must have access to the Terminal Definition File (TDF).

Step 10 Click **Continue**. The Add Special Roles page appears.

Note: The Add Special Roles page appears only if it is applicable to you. Otherwise, the Add Availability page appears.

Client WorkStation

User Administration - Add Special Roles

Key Information

First Name: Jane Last Name: Doe Institution ID: NBMB

Special Roles

Available Roles:

Selected Roles:

>> All >> << All <<

ATM Marketer Builder* - Self-Approving Builder
Card Management - Override Names Addr Restrict
Card Management - Reset PIN Tries
Institution - Currency Rate Admin
Message Board - Message Board Admin

Back Continue Cancel

Step 11 All special roles associated with the user display in the Selected Roles list box. Move the roles that you do not want the user to access to the Available Roles list box.

Step 12 Click **Continue**. The Add Availability page appears.

Client WorkStation

User Administration - Add Availability

Key Information

First Name: Jane Last Name: Doe Institution ID: NBMB

Availability (Eastern Time)

Start Time: 00:00 End Time: 23:59

Back Continue Cancel

Step 13 Complete the Start Time and End Time fields to specify the time limits for the user's access to Client-Central. Use U.S. Eastern time to specify time limits.

Step 14 Click **Continue**. The Add Tokens page appears.

Client WorkStation

User Administration - Add Tokens

Key Information

First Name: **Jane** Last Name: **Doe** Institution ID: **NBM8**

Token Information

☒ Request New Token
☐ Assign Existing Token

Shipping Address

☒ Administrator ☐ User ☐ Default ☐ Other

Institution: Fiserv Inc.

Deliver To: Linda ra

Address: 250 Johnson Rd.
Mailstop 233

Country: UNITED STATES (USA)

City: Morris Plains State: NJ ZIP: 11111

Phone: 973-682-2618 Ext: Fax: 973-682-2600

Email: NOEMAIL@NOT.COM

Comments

Comments:

Back Continue Cancel

Step 15 Click the **Request New Token** radio button to request a new token.

OR

Click the **Assign Existing Token** radio button to immediately reassign an existing token.

Important! You must delete the user security record of the original token owner before reassigning a token.

Step 16 Choose the shipping address option by clicking the appropriate radio button. The options are:

- **Administrator**—Prefills the address fields with the address of the administrator (the person adding this record).
- **User**—Prefills the address fields with the user address specified on the User Administration—User Record page.
- **Default**—Prefills the address fields with the address specified in the Shipping Address section of the User Administration—Defaults page.
- **Other**—The administrator may specify a different address.

Note: To specify the shipping address that displays if you select the Default option, go to the Defaults page.

Step 17 Click **Continue**. Add User page appears.

Note: You can edit the user information before saving the record by accessing the relevant page under Selected User tab.

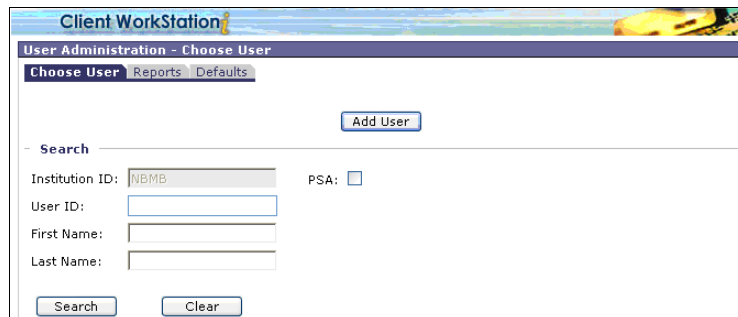
Step 18 Select the **Approval** option check box

Step 19 Click **Save** to continue. The Confirmation page confirms the addition of the user record.

Copy User

To add a new user by copying the rights and settings from an existing user's record, perform the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.



Step 3 Select a user in the results section and click **Copy User**. The Add User Details page appears.

Client WorkStation
User Administration - Add User Details

User Information
First Name: Last Name: Institution ID: NBMB

User Address
☐ Set Same as Yourself
Institution: Fiserv Inc.
Address: 250 Johnson Rd.
Mailstop 233
Country: UNITED STATES (USA)
City: Morris Plains State: NJ ZIP: 11111
Phone: 973-555-2618 Ext: Fax: 973-555-2600
Email:

ID Information
Group Number: 48 User Number:

Continue Cancel

Step 4 Fill in the First Name, Last Name, Phone, Ext, and Email fields. All other information on the record is prefilled with the values from the existing user's record. You may edit the information as required.

Client WorkStation
User Administration - Add User Details

User Information
First Name: Jackson Last Name: Doe Institution ID: NBMB

User Address
☐ Set Same as Yourself
Institution: Fiserv Inc.
Address: 250 Johnson Rd.
Mailstop 233
Country: UNITED STATES (USA)
City: Morris Plains State: NJ ZIP: 11111
Phone: 973-555-2618 Ext: Fax: 973-555-2600
Email: JDoe@noemail.com

ID Information
Group Number: 48 User Number:

Continue Cancel

Step 5 Complete [Step 4, page 14](#) through [Step 18, page 19](#) in [Add User, page 13](#).

- Step 6 Click **Save**. The Confirmation page confirms the addition of the user record.

Client WorkStation

User Administration - Confirmation

Choose User: Selected User Reports Defaults

■ User record has been added
■ EFT Security Administrators may have tasks that take up to 5 business days to complete. The status of these tasks can be tracked on the Service Request report.

Key Information

First Name:	Jackson	Last Name:	Doe	Institution ID:	NBMB	User ID:	48doe0
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User Details

User ID:	48doe0	Last Name:	Doe
First Name:	Jackson	Group/User:	48/36
Institution ID:	NBMB		
Primary Administrator:	No		
Networks Only:	False	Audit Rpt. Institution:	
Institution:	Fiserv Inc.		
Address:	250 Johnson Rd.		
	Mailstop 233		
Country:	USA		
City:	Morris Plains	State:	NJ
Phone:	973-555-2618	Ext:	4836
Email:	JDoe@noemail.com	Fax:	973-555-2600
Date Created:	06-10-2008 16:43:02 EDT	Date Last Login:	
Date Last Modified:	06-10-2008 16:43:02 EDT	By:	48ral

Note: On the Tokens page, the Copied User option displays in the Shipping Address section instead of Other. You may select this option to prefill the address fields with the user address specified in the copied user's security record.

Update User

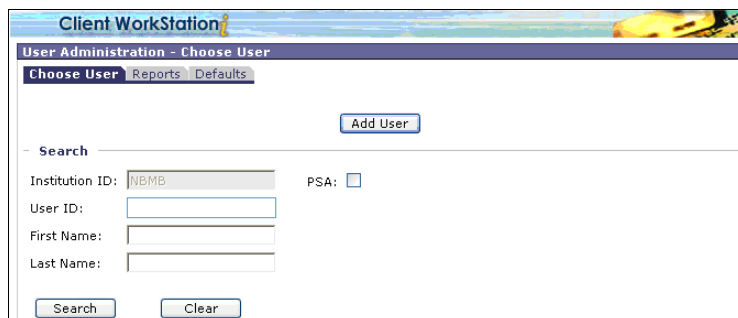
Only primary security administrators and administrators having update access can update a user security record.

When in update mode, the user security record may display applications, access rights, and other privileges that exceed the ones defined in the security record of the person administering the record. These values cannot be edited.

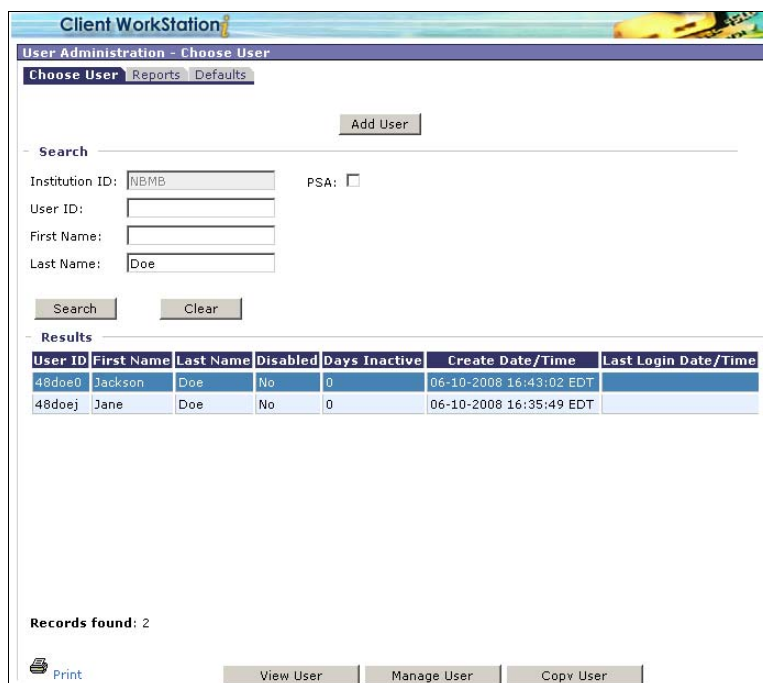
Note: An administrator cannot grant access exceeding the settings on their own security record.

To update an existing user security record, complete the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.
- Step 3 Click **Search**. Results display in table format. Each row represents a user security record.



User ID	First Name	Last Name	Disabled	Days Inactive	Create Date/Time	Last Login Date/Time
48doe0	Jackson	Doe	No	0	06-10-2008 16:43:02 EDT	
48doej	Jane	Doe	No	0	06-10-2008 16:35:49 EDT	

- Step 4 Select a record and click **Manage User**. The User Record page appears.

The screenshot shows the 'Client WorkStation' application window. The title bar reads 'User Administration - User Record'. Below the title bar is a navigation menu with tabs: 'Choose User', 'Selected User' (active), 'Reports', and 'Defaults'. Under 'Selected User', there are sub-tabs: 'Details', 'Logos', 'Applications', 'Special Roles', 'Availability', and 'Tokens'. The 'Key Information' section displays: First Name: Jackson, Last Name: Doe, Institution ID: NBMB, and User ID: 48doe0. Below this is a section titled 'User Administration Navigation Instructions' with the text: 'Complete all User Record changes using the menu items above. When the changes are complete, submit them using the Update button below.' There is an 'Approval' section with a checkbox labeled 'Charges will apply as set forth in your pricing documentation.' At the bottom are four buttons: 'Update', 'Disable', 'Delete', and 'Cancel'.

Note: The Update button is visible only if you have update access rights in the User Administration application.

- Step 5 Depending on the information you want to update, click the Details, Logos, Applications, Special Roles, Availability, or Tokens page under Selected User tab. The relevant page displays.

The screenshot shows the 'Client WorkStation' application window. The title bar reads 'User Administration - Special Roles'. Below the title bar is a navigation menu with tabs: 'Choose User', 'Selected User' (active), 'Reports', and 'Defaults'. Under 'Selected User', there are sub-tabs: 'Details', 'Logos', 'Applications', 'Special Roles' (active), 'Availability', and 'Tokens'. The 'Key Information' section displays: First Name: Jackson, Last Name: Doe, Institution ID: NBMB, and User ID: 48doe0. Below this is the 'Special Roles' section. It contains two lists: 'Available Roles' (empty) and 'Selected Roles' (containing: Card Management - Override Names Addr Restrict, Card Management - Reset PIN Tries, Institution - Currency Rate Admin, and Message Board - Message Board Admin). Between the lists are four buttons: '>>', 'All >>', '<<', and 'All <<'. At the bottom are two buttons: 'OK' and 'Cancel'.

Step 6 Update the user information. Tokens allows you to either view the existing token serial number or request a token replacement.

Client WorkStation

User Administration - Special Roles

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | **Special Roles** | Availability | Tokens

- Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

- Special Roles

Available Roles:

Card Management - Reset PIN Tries

Selected Roles:

Card Management - Override Names Addr Restrict
Institution - Currency Rate Admin
Message Board - Message Board Admin

>> All >> << All <<

OK Cancel

Step 7 Click **OK**. This saves the updates temporarily and returns you to the User Record page.

Client WorkStation

User Administration - Special Roles

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | **Special Roles** | Availability | Tokens

- Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

- Special Roles

Available Roles:

Card Management - Reset PIN Tries

Selected Roles:

Card Management - Override Names Addr Restrict
Institution - Currency Rate Admin
Message Board - Message Board Admin

>> All >> << All <<

OK Cancel

Note: The only exception is the User Administration—Applications page, where you click the Continue button to save updates temporarily and proceed to the Access Rights page.

- Step 8 After completing all required changes, select the **Approval** option check box.

Client WorkStation

User Administration - User Record

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | Special Roles | Availability | Tokens

Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

— User Administration Navigation Instructions —
 Complete all User Record changes using the menu items above.
 When the changes are complete, submit them using the Update button below.

-- Approval --

☒ Charges will apply as set forth in your pricing documentation.

Update Disable Delete Cancel

- Step 9 Click **Update** to continue. The Confirmation page confirms the update. The user security record is updated and a success message displays on the confirmation page.

Client WorkStation

User Administration - Confirmation

Choose User | **Selected User** | Reports | Defaults

■ User record has been updated
 ■ EFT Security Administrators may have tasks that take up to 5 business days to complete. The status of these tasks can be tracked on the Service Request report.

Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

User Details

User ID: **48doe0**
 First Name: **Jackson** Last Name: **Doe**
 Institution ID: **NBMB** Group/User: **48/36**
 Primary Administrator: **No**

Networks Only: **False** Audit Rpt. Institution:

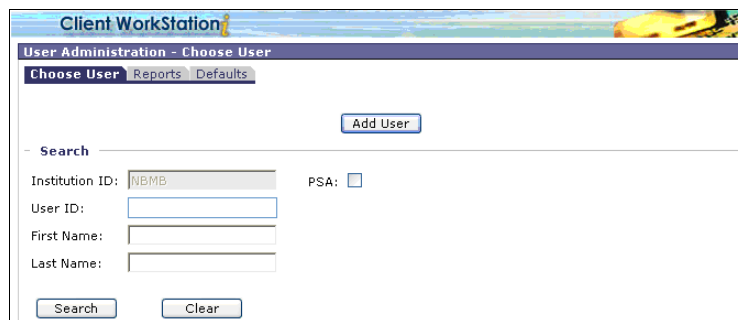
Institution: **Fiserv Inc.**
 Address: **250 Johnson Rd.**
 Mailstop **233**
 Country: **USA**
 City: **Morris Plains** State: **NJ** ZIP: **11111**
 Phone: **973-555-2618** Ext: Fax: **973-555-2600**
 Email: **JDoe@noemail.com**

Date Created: **06-10-2008 16:43:02 EDT** Date Last Login:
 Date Last Modified: **06-10-2008 17:00:51 EDT** By: **48ral**

Disable User

A disabled user cannot access the portal. When you disable a user you are not deleting the user ID. Use this function when you do not want a user to have access for a period of time, such as an extended medical leave or long vacation.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



The screenshot shows a web application window titled 'Client WorkStation'. Inside, there's a header bar with 'User Administration - Choose User'. Below this, there are three tabs: 'Choose User' (selected), 'Reports', and 'Defaults'. A blue 'Add User' button is located in the top right. The main area is titled 'Search' and contains several input fields: 'Institution ID' (with 'NBMB' entered), 'User ID', 'First Name', and 'Last Name'. To the right of these fields is a 'PSA' checkbox, which is currently unchecked. At the bottom of the search section are 'Search' and 'Clear' buttons.

- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.

Step 3 Click **Search**. Results display in table format. Each row represents a user security record.

Client WorkStation
User Administration - Choose User
 Choose User | Reports | Defaults

Add User

Search

Institution ID: NBMB PSA: ☐

User ID:

First Name:

Last Name: Doe

Search Clear

Results

User ID	First Name	Last Name	Disabled	Days Inactive	Create Date/Time	Last Login Date/Time
48doe0	Jackson	Doe	No	0	06-10-2008 16:43:02 EDT	
48doej	Jane	Doe	No	0	06-10-2008 16:35:49 EDT	

Records found: 2

Print View User Manage User Copy User

Step 4 Select a user and click **Manage User**. The User Record page appears.

Client WorkStation
User Administration - User Record
 Choose User | **Selected User** | Reports | Defaults
 Details | Logos | Applications | Special Roles | Availability | Tokens

Key Information

First Name: Jackson Last Name: Doe Institution ID: NBMB User ID: 48doe0

User Administration Navigation Instructions
 Complete all User Record changes using the menu items above.
 When the changes are complete, submit them using the Update button below.

-- Approval --
☐ Charges will apply as set forth in your pricing documentation.

Update Disable Delete Cancel

- Step 5 Select the **Approval** check box and click **Disable**. The User Record page displays a success message.

Client WorkStation

User Administration - User Record

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | Special Roles | Availability | Tokens

■ User record has been disabled

Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

User Administration Navigation Instructions

Complete all User Record changes using the menu items above.
When the changes are complete, submit them using the Update button below.

-- Approval --

☐ Charges will apply as set forth in your pricing documentation.

Update Enable Delete Cancel

From here you can:

- Use the navigation tabs at the top of the page to view reports and defaults.
- Return to the Choose User page and choose another user to view, manage, or copy.

Enable User

Use the enable feature to give disabled user IDs access to the portal, for example, after an employee returns from an extended leave.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).

Client WorkStation

User Administration - Choose User

Choose User | Reports | Defaults

Add User

Search

Institution ID: PSA: ☐

User ID:

First Name:

Last Name:

Search Clear

- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.

Step 3 Click **Search**. Results display in table format. Each row represents a user security record.

Client WorkStation

User Administration - Choose User

Choose User Reports Defaults

Add User

Search

Institution ID: NBMB PSA: ☐

User ID:

First Name:

Last Name: Doe

Search Clear

Results

User ID	First Name	Last Name	Disabled	Days Inactive	Create Date/Time	Last Login Date/Time
48doe0	Jackson	Doe	Yes	0	06-10-2008 16:43:02 EDT	
48doej	Jane	Doe	No	0	06-10-2008 16:35:49 EDT	

Records found: 2

Print View User Manage User Copy User

Step 4 Select a disabled user and click **Manage User**. The User Record page appears.

Client WorkStation

User Administration - User Record

Choose User Selected User Reports Defaults

Details Logos Applications Special Roles Availability Tokens

Key Information

First Name: Jackson Last Name: Doe Institution ID: NBMB User ID: 48doe0

User Administration Navigation Instructions

Complete all User Record changes using the menu items above.
When the changes are complete, submit them using the Update button below.

-- Approval --

☐ Charges will apply as set forth in your pricing documentation.

Update Enable Delete Cancel

- Step 5 Select the **Approval** check box and click **Enable**. The User Record page displays with the success message.

Client WorkStation

User Administration - User Record

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | Special Roles | Availability | Tokens

■ User record has been enabled

Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

User Administration Navigation Instructions
Complete all User Record changes using the menu items above.
When the changes are complete, submit them using the Update button below.

-- Approval --

☐ Charges will apply as set forth in your pricing documentation.

Update Disable Delete Cancel

From here you can:

- Use the navigation tabs at the top of the page to view reports and defaults.
- Return to the Choose User page to choose another user to view, manage, or copy.

Delete User

Only primary security administrators and administrators having delete access can delete a user security record.

To delete an existing user security record, complete the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).

Client WorkStation

User Administration - Choose User

Choose User | Reports | Defaults

Add User

Search

Institution ID: PSA: ☐

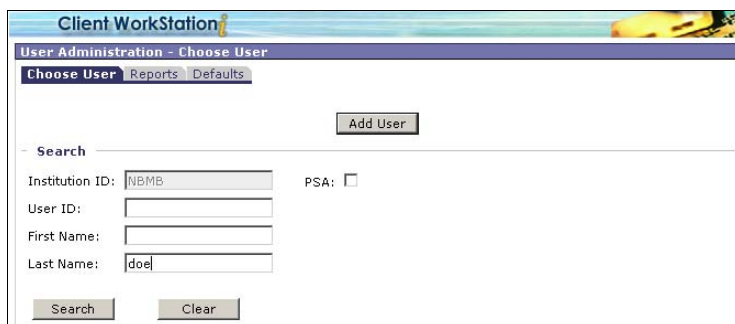
User ID:

First Name:

Last Name:

Search Clear

- Step 2 Type relevant information in the User ID, First Name, and Last Name fields. You can use any combination of fields to enter search criteria.



Client WorkStation

User Administration - Choose User

Choose User Reports Defaults

Add User

Search

Institution ID: NBMB PSA: ☐

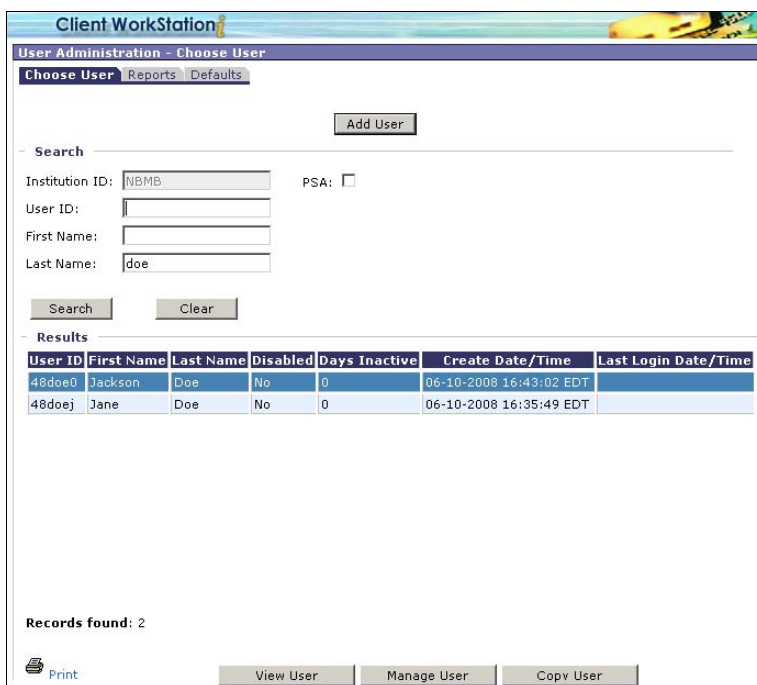
User ID:

First Name:

Last Name: doe

Search Clear

- Step 3 Click **Search**. Results display in table format. Each row represents a user security record.



Client WorkStation

User Administration - Choose User

Choose User Reports Defaults

Add User

Search

Institution ID: NBMB PSA: ☐

User ID:

First Name:

Last Name: doe

Search Clear

Results

User ID	First Name	Last Name	Disabled	Days Inactive	Create Date/Time	Last Login Date/Time
48doe0	Jackson	Doe	No	0	06-10-2008 16:43:02 EDT	
48doej	Jane	Doe	No	0	06-10-2008 16:35:49 EDT	

Records found: 2

Print View User Manage User Copy User

Step 4 Select a record and click **Manage User**. The User Record page appears.

Client WorkStation

User Administration - User Record

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | Special Roles | Availability | Tokens

Key Information

First Name: **Jackson** Last Name: **Doe** Institution ID: **NBMB** User ID: **48doe0**

— User Administration Navigation Instructions
Complete all User Record changes using the menu items above.
When the changes are complete, submit them using the Update button below.

-- Approval --

☐ Charges will apply as set forth in your pricing documentation.

Update Disable Delete Cancel

Note: The Delete button is visible only if you have delete access rights in the User Administration application.

Step 5 Select the **Approval** option check box, click **Delete**, and click **OK**.

Client WorkStation

User Administration - User Record

Choose User | **Selected User** | Reports | Defaults

Details | Logos | Applications | Special Roles | Availability | Tokens

Key Information

First Name: **Jackson** Last Name: **Doe**

— User Administration Navigation Instructions
Complete all User Record changes using the menu items above.
When the changes are complete, submit them using the Update button below.

-- Approval --

☒ Charges will apply as set forth in your pricing documentation.

Update Disable Delete Cancel

Microsoft Internet Explorer

Are you sure you want to delete this user?

OK Cancel

The Choose User page confirms deletion of the selected user record.

Client WorkStation

User Administration - Choose User

Choose User | Reports | Defaults

■ User security record has been deleted

Add User

Search

Institution ID: PSA: ☐

User ID:

First Name:

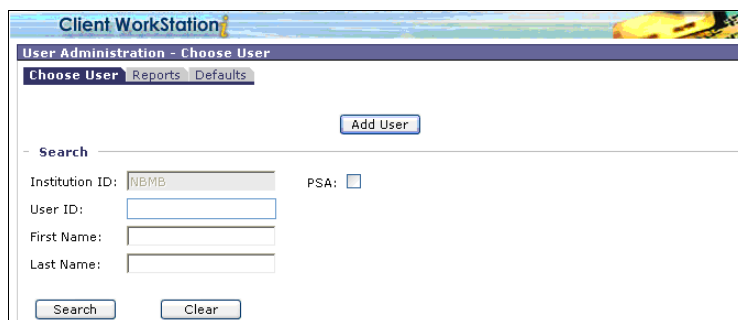
Last Name:

Search Clear

Setting Defaults

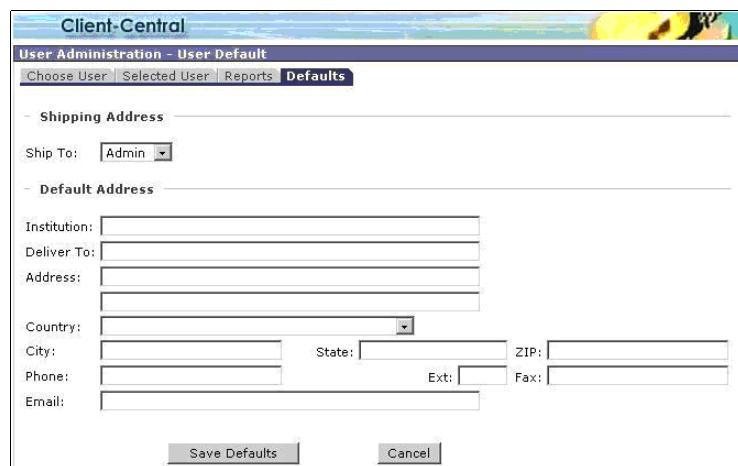
To set defaults in User Administration, complete the following.

- Step 1 Access User Administration and the Choose User page (see [Access User Administration, page 9](#)).



The screenshot shows the 'Client WorkStation' application window with the title 'User Administration - Choose User'. It features three tabs: 'Choose User', 'Reports', and 'Defaults'. The 'Choose User' tab is active. There is an 'Add User' button at the top right. Below it is a 'Search' section with a text input field for 'Institution ID' (containing 'NMBB'), a 'PSA' checkbox, and three text input fields for 'User ID', 'First Name', and 'Last Name'. At the bottom of the search section are 'Search' and 'Clear' buttons.

- Step 2 Click the **Defaults** tab. The User Administration—User Default page appears.



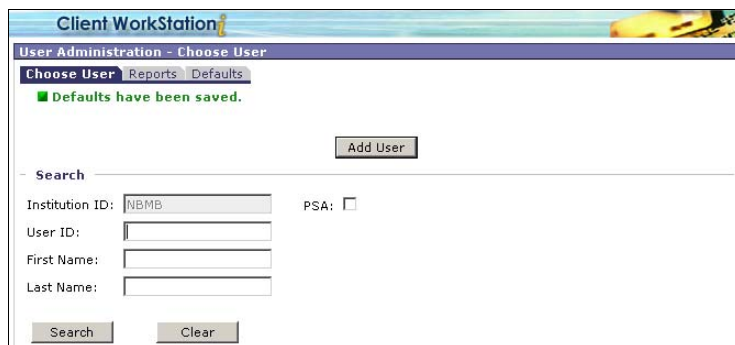
The screenshot shows the 'Client-Central' application window with the title 'User Administration - User Default'. It features four tabs: 'Choose User', 'Selected User', 'Reports', and 'Defaults'. The 'Defaults' tab is active. The page is divided into two sections: 'Shipping Address' and 'Default Address'. The 'Shipping Address' section has a 'Ship To' dropdown menu with 'Admin' selected. The 'Default Address' section contains several text input fields: 'Institution', 'Deliver To', 'Address', 'Country' (with a dropdown arrow), 'City', 'State', 'ZIP', 'Phone', 'Ext', 'Fax', and 'Email'. At the bottom are 'Save Defaults' and 'Cancel' buttons.

- Step 3 Fill in the required information.

User Administration supports the following defaults:

- **Ship To**—Identifies the shipping address option that is preselected by default when you wish to order a token.
- **Default Address**—The address that populates the shipping address fields when the Default option is selected while ordering a token.

- Step 4 Click **Save Defaults**. The User Administration—Choose User page displays a confirmation message.

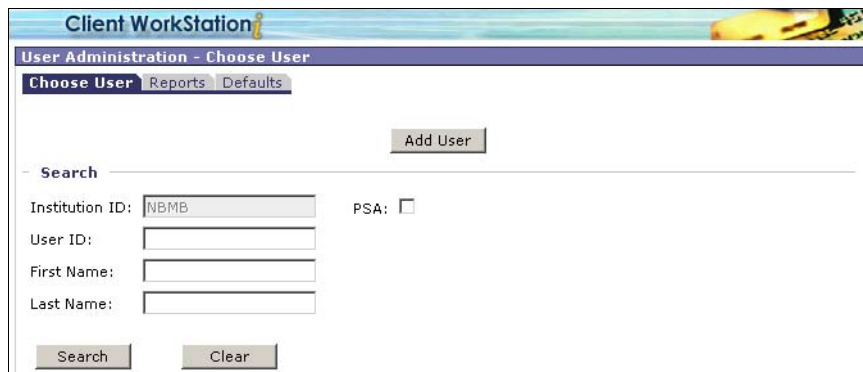


The screenshot shows the 'Client WorkStation' application window. The title bar reads 'User Administration - Choose User'. Below the title bar are three tabs: 'Choose User' (selected), 'Reports', and 'Defaults'. A green message box states 'Defaults have been saved.' Below this is an 'Add User' button. A search section is visible with the following fields: 'Institution ID' (containing 'NBMB'), 'User ID', 'First Name', and 'Last Name'. There is also a 'PSA' checkbox which is unchecked. At the bottom of the search section are 'Search' and 'Clear' buttons.

Service Requests Report

The Service Requests report displays maintenance done in User Administration (user adds, deletes, and updates), and gives you a status of the tasks that are completed by EFT security administrators.

- Step 1 Access User Administration (see [Access User Administration, page 9](#)). The Choose User page appears.



This screenshot is identical to the one above, showing the 'Client WorkStation' application window with the 'User Administration - Choose User' title bar and tabs. The 'Choose User' tab is selected, and the search fields are visible with 'NBMB' in the 'Institution ID' field.

Step 2 Click **Reports**. The Reports page appears showing the Search criteria.



You can choose to run a general search using the defaults, or you can enter information in one or more of the available fields to display specific maintenance done in CWSi User Administration. When choosing the print link, you will be given the search criteria information as well as the results.

Step 3 Type any required search criteria.

Field	Description
Institution ID	Read only. Logo associated with your token ID.
User ID	Allows you to search for maintenance done to a specific user ID. If you choose to use this field, you must enter the full user ID.
User Request Type	Allows you to search for specific service request types. The field defaults to None allowing all User Request Type to be returned. Drop-down options: <ul style="list-style-type: none"> • None (default) • Add User • Delete User • Update User

Field	Description
Token Request Type	<p>Allows you to search for a specific kind of token request. The options available in the drop-down list depend on the User Request Type selected.</p> <p>The field defaults to None allowing all Token Request Types to be returned.</p> <p>User Request Type—None:</p> <ul style="list-style-type: none"> • None (default) • Issue new token • Delete token • Replace token • Assign existing token <p>User Request Type—Add User</p> <ul style="list-style-type: none"> • None (default) • Issue new token • Assign existing token <p>User Request Type—Delete User</p> <ul style="list-style-type: none"> • Delete token (default) <p>User Request Type—Update User</p> <ul style="list-style-type: none"> • None (default) • Replace token • Assign Existing token
Requestor User ID	<p>Allows you to search for maintenance completed by a specific administrator.</p> <p>If you choose to use this field, you must enter the full user ID.</p>
Status	<p>Allows you to search for specific service requests with a specific status.</p> <p>The field defaults to None allowing both Completed and In progress maintenance to be returned.</p> <p>Drop-down options:</p> <ul style="list-style-type: none"> • None (default) • Completed • In progress
User First Name	<p>Allows you to search for maintenance done to user security record based on the user's first name.</p> <p>If you choose to use this field, you must enter the full first name.</p>
User Last Name	<p>Allows you to search for maintenance done to a user security record based on the user's last name.</p> <p>If you choose to use this field, you must enter the full last name.</p>
Request Date From	<p>Defaults to 90 days prior to the current date but can be changed to narrow the date range of the search.</p>
Request Date To	<p>Defaults to current date but can be changed to narrow the date range of the search.</p>

Step 4 Click **Search**. The Service Requests report displays. Scroll bars allow you to view the entire report.

Client WorkStation

User Administration - Reports

Choose User | **Reports** | Defaults

Service Requests

Print

Search

Institution ID: User ID:

User Request Type: Token Request Type:

Requestor User ID: Status:

User First Name: User Last Name:

Request Date From: Request Date To:

Note: For assistance with data older than 90 days, please contact Express Client Services.

Request Report

Request ID	User ID	User Name	Request Type	Applications	Request Date (ET)	Requestor User ID
6070	0048epoc12	Joe Davis	Update user	-- No application changes made --	08-08-2008 17:12:21	0048EPOC32
5973	2775testu1	Joe Testua	Update user Replace token	-- No application changes made --	07-22-2008 10:16:09	2775TESTUJ
5972	2775testu1	Joe Testua	Update user Assign Existing token	-- No application changes made --	07-22-2008 10:14:39	2775TESTUJ
5971	2775testu1	Joe Testua	Update user Assign Existing token	-- No application changes made --	07-22-2008 10:12:02	2775TESTUJ
5970	2775testu1	Joe Testua	Update user Assign Existing token	-- No application changes made --	07-22-2008 09:44:37	2775TESTUJ
CVI-Reports*: Add application						

Field	Description
Request ID	Unique identifier for each add, change, or token request.
User ID	User ID being added or changed.
User Name	Name associated with user ID.
Request Type	Type of action request.
Applications	Applications and access rights that were added or changed.
Request Date (ET)	Date and time the maintenance was done.
Requestor User ID	User ID of person adding the record or making the change.
Status	Current status of the request. Will show In Progress until it is complete.
Deliver To	Token delivery information. Applicable only when a new or replacement token is requested.

