QUICK REFERENCE GUIDE

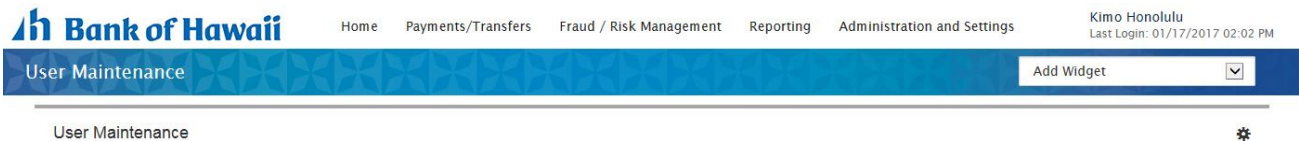## Administration & Settings

User-Based Permission

User Maintenance

A System Administrator will have permission to create Users and grant User permissions based on company entitlements.

1. From *Administration and Settings*, select *User Maintenance*.

2. Click *Add New User*.

User-Based Permission

User Maintenance > User Profile

1. Enter basic User Information in *User Profile*.
    - Fields with a red asterisk (*) are <u>mandatory</u>
2. The *User* ID is alphanumeric and is limited to 20 characters.
    - Do not use spaces or special characters
3. The *User Name* is alphanumeric and is limited to 40 characters and spaces.
    - Do not use special characters, such as hyphens, commas or ampersands
4. The *User Group* field will prepopulate with the Company ID.

IMPORTANT: Before clicking the *Add User* button, at least <u>one</u> permission must be assigned to the User in addition to populating the *mandatory* basic User Profile fields.

User-Based Permission

User Maintenance > User Profile *(continued)*

5. Enter a temporary Password; renter in **Repeat New Password**. A warning message in red will appear if the Repeat New Password does not match Password.
   - Follow password protocols as follows:
     - o A minimum of 1 lowercase letters is required
     - o A minimum of 1 uppercase letters is required
     - o A minimum of 1 digit(s) is required
     - o A minimum of 1 special characters is required !"#$%&'()*+,-.\:=?@^_{|}~;
     - o The new password must contain at least 8 character(s)

6. In **Admin Settings**, check box **Disable User** to prevent a User from accessing the system; uncheck to re-enable the User's access to the system.

7. In **Challenge Method**, the default will be One-Time Passcode.

8. Check box **Send notification when an alert changes** to notify the User (via email) if there is a change to the User Profile. If User is the System Administrator, System Administrator will be notified of a change to any User Profile on a company level.
   Note: If this box is checked, an email address must be populated in the Email field in the User Information section in order for the User to receive the notification.

9. Proceed to the function tabs.
   - For the BBC Image Service, up to four function tabs may be entitled to your company:
     - o User Profile
     - o Reporting
     - o Admin
     - o Alerts

User-Based Permission

User Maintenance > Reporting

A System Administrator will grant a User permissions to access various types of information reporting.

1. Select **Reporting**.
2. Select applicable checkbox(es) to assign permissions to the User.
   - Click **All Reports** within each section to select all reports *OR* check the individual boxes, as applicable.
3. Assign eStatements and/or accounts.

User-Based Permission

User Maintenance > Assign eStatement

1. To assign an eStatement, click **Edit eStatement**.
2. Assign any or all eStatements:
   - Click and drag the eStatement box from **Available eStatements** (left column) to **Assigned eStatements** (right column); *OR*
   - Select an eStatement by checking the box and click **Move selected eStatements**.
3. After assigning the eStatements, click **Add eStatements**.
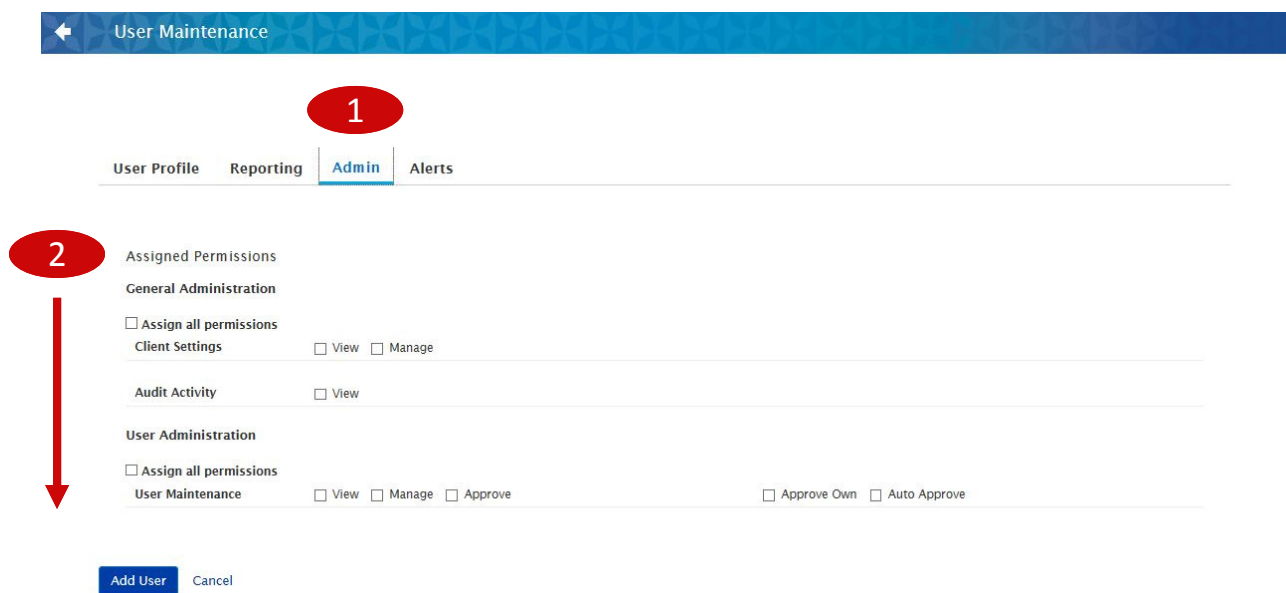
User-Based Permission

User Maintenance > Admin

A System Administrator will grant a User permissions to access various Administrative functions.

1. Select **Admin**.
2. Select applicable checkbox(es) to assign permissions to the User.
   - Click **Assign all permissions** within each section to select all permissions *OR* check the individual boxes, as applicable.

Note: See FAQ for Admin > Assigned Permissions definitions.
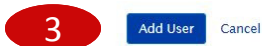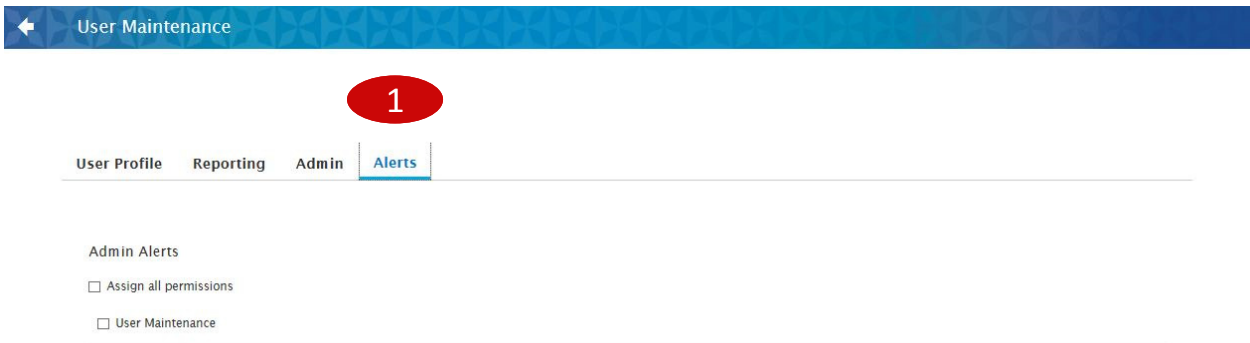
User-Based Permission

User Maintenance > Alerts

A System Administrator will grant a User permissions to create alerts.

1. Select **Alerts**.
2. Select applicable checkbox(es) to assign permissions to the User.

3. Click **Add User**.
4. A message in greenbar will appear at the top of the User Maintenance widget.

User-Based Permission

User Maintenance > Approve, Modify, Disable and Delete Users

System Administrators with permissions to approve, modify, disable or delete Users can perform these tasks through the User Maintenance widget.

1. New Users are placed in *Entered* status.
2. To approve a User, click the drop-down icon in the Actions column and select *Approve* or check the box and click the *Approve* button.
3. Based on your company's entitlements, a second User with administrative permissions may need to authenticate this action.

To modify a User's profile, permissions or assignments:

1. Click the drop-down icon in the Actions column, select *Modify*, make the changes and click *Update*.
2. The User status will change to *Modified*.
3. To approve a User in Modified status, click the drop-down icon in the Actions column and select *Approve*, or check the box and click the *Approve* button.
4. Based on your company's entitlements, a second User with administrative permissions may need to authenticate this action.

User-Based Permission

User Maintenance > Approve, Modify, Disable and Delete Users *(continued)*

To *Disable* or *Delete* a User:

1. Click the drop-down icon in the Actions column, select **Disable** or **Delete** from the **Actions** column.
2. Click **Approve**, or check the box and click the **Approve** or **Delete** button.
3. Based on your company's entitlements, a second User with administrative permissions may need to authenticate this action.

An alternate method to Disable/re-enable a User:

1. Click the drop-down icon in the Actions column and select **Modify**.
2. In the User Profile, scroll to **Admin Settings**.
3. Click on the checkbox to Disable User; uncheck to re-enable the User.
4. Click **Update.**
5. The User's status will change to **Modified**.
6. To approve a User in Modified status, click the drop-down icon in the Actions column and select **Approve**, or check the box and click the **Approve** button.
7. Based on your company's entitlements, a second User with administrative permissions may need to authenticate this action.

If Deleting a User, you will be prompted to confirm the action:

Definitions

Definitions

Assigned Permissions > Admin

- *View* – User is assigned permission to view administrative permissions.
- *Manage* – User is assigned permission to manage administrative permissions.
- *Approve* – User is assigned permission to approve administrative permissions.
- *Approve Own* – User is assigned permission to approve items that he/she created or modified.
- *Auto Approve* – Items are automatically approved after User creates it.

Contact Information

For more information, contact Cash Management Services at the following:

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