# Enterprise Payment Solutions

## JHA SmartPay Business$^{SM}$

March 2020


# User Administrator Handbook

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# Change Log

| Modification Date | Revision |
|---|---|
| March 2020 | Adds information about Admin password resets for SPB and SPM |

# Introduction

The administrator (FI Admin or User Admin) is responsible for creating and maintaining user profiles for employees within your organization. An administrator grants a user certain privileges and roles so that the user can perform tasks in the system.

An admin can be responsible for any of the following:

- Set up employee user profiles
- Enable or disable a user
- Edit a user profile
- Unlock a user's profile
- Delete a user's profile
- Reset a password to a user's profile and provide a new temporary password
- Assign specific roles or functions to an employee
- Designate certain users as authorized callers for support-related questions
- Enable access to any and all accounts (locations) for which an employee will be processing

Based on the assigned role(s) provided by the administrator, users will have the ability to process transactions, generate reports, research historical transactions, edit transactions, and/or contact support.

# Available Resources

If you have questions about the application, please contact your first line of support for more information.

For a complete guide on how to run reports, please see the *User Reports Handbook*.

# User Terminology

Throughout this manual, the text will refer to certain parties and their responsibilities when managing your customers with this application. The following terms will help define "who is who" while performing tasks in the system.

1. **User Admin and FI Admin** – Responsible for setting up user profiles for persons within your organization. User Admins will establish privileges and roles for users, allowing them to complete tasks within the application. These administrators are capable of the following:

    - Creating, deleting, enabling, or disabling a user
    - Resetting a password and providing a temporary password to the user
    - Unlocking a user who has been locked out of the application

- Assigning specific privileges and roles to a user for completing tasks

**NOTE:** If the User Admin needs to perform tasks in managing customers or transactions, it is strongly recommended a separate user profile be created with the appropriate privileges and roles. Using a user profile helps specify which users are performing tasks and prevents miscommunication.

2. **User** – A person within your organization who is responsible for completing tasks within the application, as designated by the User Admin. Responsibilities for a user can include:
    - Setting up customer profile information.
    - Editing transaction details.
    - Generating reports.
    - Processing transactions.
3. **Customer** – A client within your organization wishing to make deposits/donations.

# Session Timeouts & Maintenance

If a user remains inactive in the system for at least 30 minutes, a *Session Timeout Warning* appears two minutes before the user is automatically logged out, providing the user with an opportunity to remain logged in. Click anywhere in the application to remain logged in.

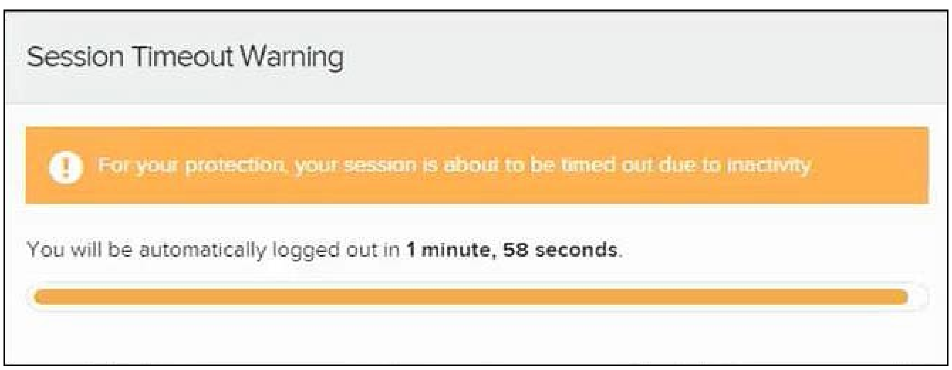


FIGURE 1 – SESSION TIMEOUT WARNING

You may also see a notice that the system will shut down temporarily for maintenance. This notice will appear as a bar at the top of your page. The notice will indicate the time and date when the system will shut down for maintenance.

 

# Admin: Getting Started

You will be provided with your site's URL address, an admin user name, a temporary password, and a company name that must be entered upon first logging in to the system. Save the URL for future use, as it is a route of access into the system.

1. Once at the provided URL address, complete the **User Name**, **Password**, and **Company** fields. Select **Log In**.

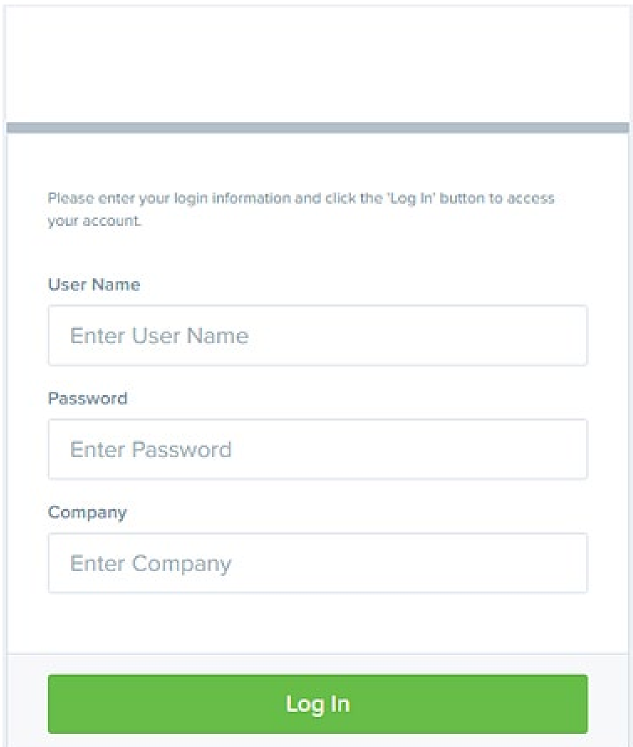


FIGURE 2 - CUSTOMER LOGIN PAGE

2. The system will prompt you to change your password. Passwords expire every 90 days and are case-sensitive. Use the following guidelines when creating a new password:
    - At least 1 uppercase letter
    - At least 1 lowercase letter
    - At least 1 number
    - 8-50 characters in length
3. Select **Update Password**.

 

# Password Security

To help protect users' authentication credentials, each user should have his or her own unique set of credentials. It's best to choose hard-to-guess passwords, including a mix of upper- and lowercase letters, numbers, and special characters. Admins should take steps to protect passwords. Never write down your password or share it with anyone. Don't store passwords where they might be found.

Passwords are reset every 90 days, and you cannot reuse any of the previous four passwords. If you suspect that your password has been compromised, change it immediately. Five unsuccessful login attempts will cause a user account to be temporarily locked. To unlock an account, see the "Unlocking a Customer/Member User" section.

# Creating a Secret Question

As a user, you should have an email address associated with your profile where a new temporary password can be sent if you forget your password. With the associated email address, you will be able to make changes to your password as long as you are not locked out of your profile.

A secret question will need to be set up as a security measure before a new password can be created.

If the secret question is answered correctly you will receive an email with a new temporary password. Secret questions do not need to be a complete question or contain a question mark. The secret question and answer are not case-sensitive.

**NOTE:** Single sign-on users will not need to establish a secret question.

1. Log in to the system, and select **the user menu | My Settings**, as shown below.

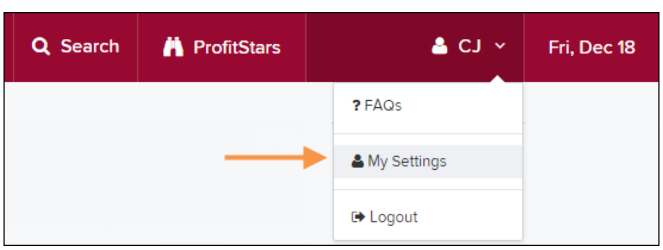


FIGURE 3 - MY SETTINGS

2. The system will prompt you for your current login password to reach the *My Settings* page. Once there, make changes to the fields in the *Change Password*, *Secret Question*, and/or *Authorized Caller* sections, as needed.
3. Select **Update** when finished.

 

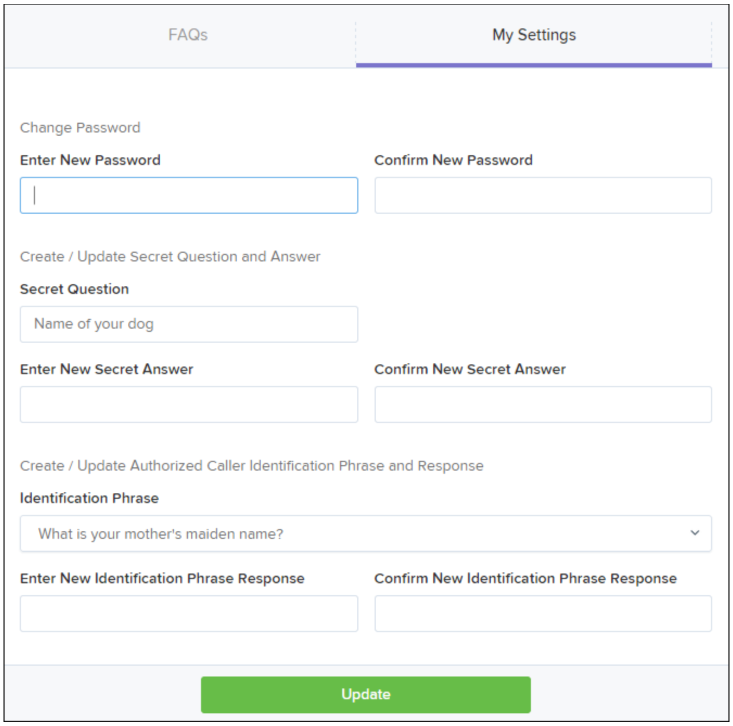


FIGURE 4 - MY SETTINGS PAGE

4. Enter an answer in the **Enter New Secret Answer** field and again in the **Confirm New Secret Answer** field. From this page, you can also make changes to your password if needed.
5. Select **Update** when finished.

# Self-Service Password Reset

Users can also reset passwords using the password rest link. To reset a password:

1. Click the **Request Password** button.
2. Answer the security question.
3. Click **Request Password**. This will bring up a notification window letting you know a password reset link has been emailed to you.

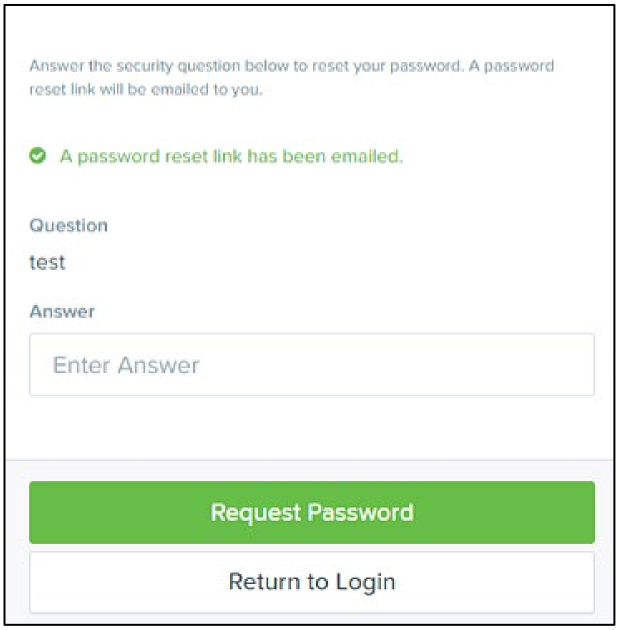


FIGURE 5 – RESETTING PASSWORD LINK NOTIFICATION

4. Go to your email and then click the provided link. An existing user will have one hour to use the link. New users will have one day.
5. When the *Security Challenge* page opens in your browser, answer the security question a second time.
6. Click **Submit Answer**.
7. On the next page, complete the **New Password** and **Confirm Password** fields.
8. Click **Update Password**. A *Password Update Complete* notification appears.
9. Return to the *Login* page to submit your updated password.

# Updating a User Profile

As the Admin, you will need to update your profile with an email address where a new temporary password can be sent, if needed.

1. Log in to the system, and then select **Admin | Users** from the left main menu.

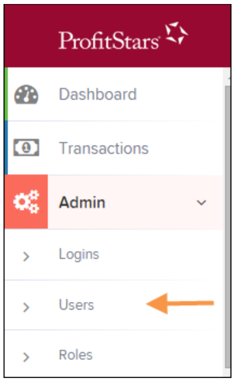


FIGURE 6 – ADMIN TAB, USERS SUB-OPTIONS

2. Select  **Edit** for the user profile to be updated (in this case, the Admin).

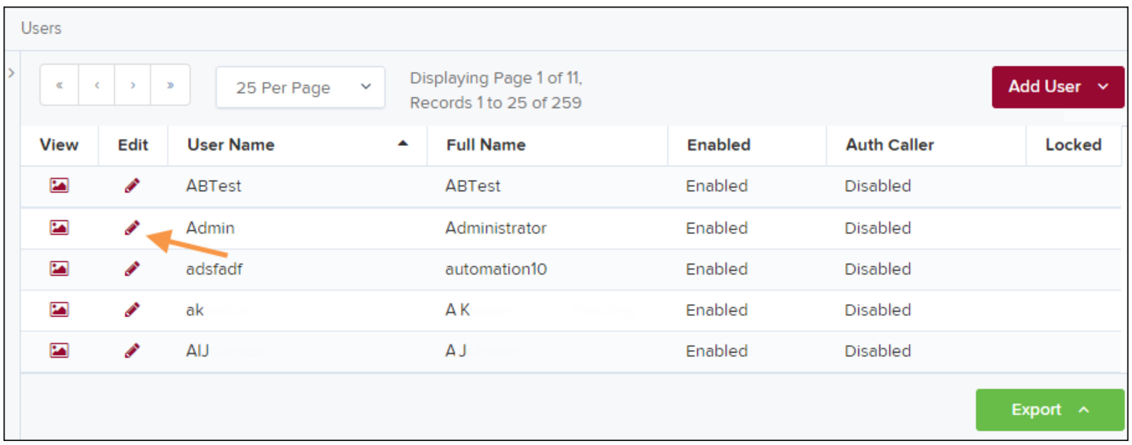


FIGURE 7 – EDIT USER OPTION

3. Change any of the **Update User Settings**, **Privileges for this User**, **Roles**, and **Locations** available for the user. Note that the **Email Address** field is in the **Update** *User Settings* section. Select **Update** to save all changes.

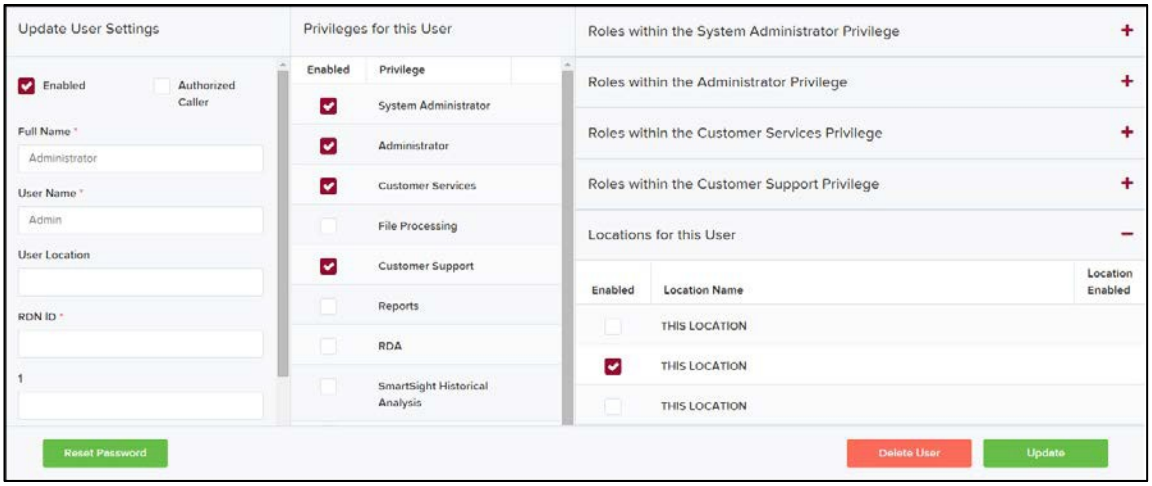


FIGURE 8 – EMAIL ADDRESS ON UPDATE USER SETTINGS PAGE

# Creating a User

The administrator is responsible for creating users who will be working with transactions, reporting, or other tasks within the system on a daily basis. The Admin is also responsible for updating a user's profile, providing new passwords, unlocking a user's profile in the event they become locked out of the system, and deleting a user's profile, if necessary.

1. Log in to the system, and then select **Admin | Users** from the left main menu.
2. From the left navigational bar, under the **User Admin** heading, select **Add User**.

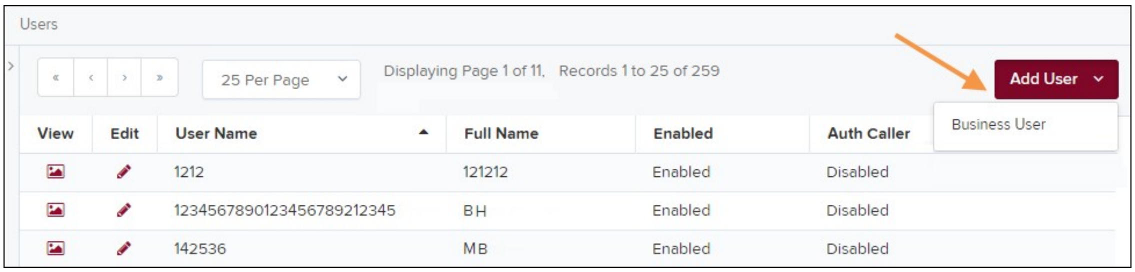


FIGURE 9 – ADD USER OPTION

3. Fill out the *Add User Settings* and the *Privileges for this User* sections. Note that a temporary password is displayed at the bottom of the page—provide this password to the user you are creating.
   a. Select the **Authorized Caller** check box if this user will contact EPS for support, if necessary. Once enabled, the user will then be required to establish an **Authorized Caller Identification Phrase** that will be used by the EPS Customer Support representative to verify that the user is authorized before providing support. Callers who are not able to answer their identification phrase or are not authorized users will be directed to their financial institution for further assistance.
   b. Once you have selected privileges to provide to this user, click **Add**.
4. The system will create the user and allow you to select roles underneath each of the privileges assigned to them. Select roles for this user—for a complete list, please see Appendix A: *Privileges and Roles*.
   a. Select the locations for this user.
   b. Select **Update** to finish assigning privileges and roles for this user.

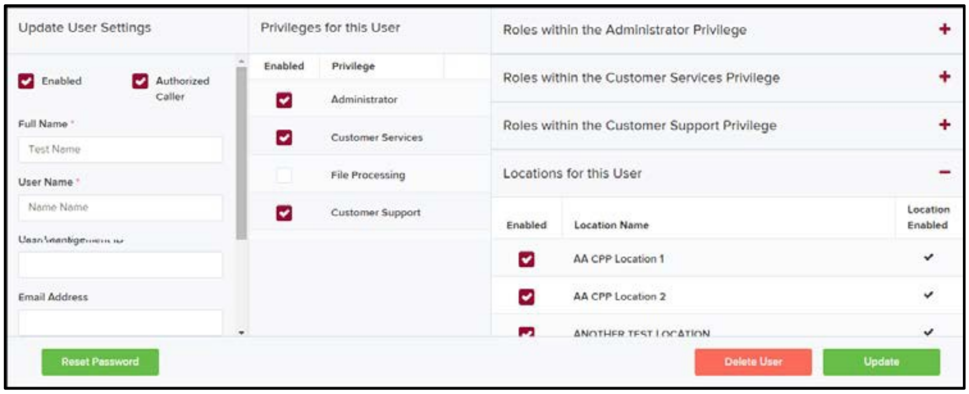


FIGURE 10 – UPDATING A USER

# Assigning Privileges and Roles

The administrator will need to assign the appropriate privileges and subsequent roles to users' profiles for them to complete tasks within the application. A user must first be given a privilege before roles within that privilege become available for assignment.

The following table lists the most common roles associated with the *Customer Services* privilege.

| Role | Definition |
|---|---|
| Accounting | Allows a user to run reports, balance all checking and credit card transactions, look at transaction details, edit transactions, view check images, and monitor and research transactions. |
| Accounting – Approve Check Only | In conjunction with the Dual Authorization feature within a user's profile, this role designates the user as the second person that can approve a transaction in the **Awaiting Approval** status. The transaction will have been made by a different user. |
| Accounting – User Role | A user with this role will not have access to the *Transaction Status Summary* located on the *Home* page of the application. |
| Credit Card | A user will be able to process scanned and card-not-present transactions. |
| Credit Card View Only | A user will only be able to view payment screens concerning credit card information but will not be able to process a payment. |
| Edit ACH Opt Out | A user can add to and/or edit the ACH Opt Out list. |
| Preauthorized Recurring Credit | A user can set up recurring ACH credits which customers can use to pay creditors.<br><br>**NOTE:** This feature should not be used for payroll. |
| Preauthorized Single Credits | When enabled, a user can create a one-time manual ACH credit or partial refund. Alternatively, the customer can create a payment to |

| | |
|---|---|
| | his/her creditor. |
| Preauthorized Single Debits | A user can create a one-time customer-authorized ACH debit transaction. |
| QB Admin | A user can set up the link to the QuickBooks account and export transaction files to QuickBooks. |
| Refund | A user can create refunds (complete reversals) of already processed ACH transactions. |
| RDC Admin | User can create, scan, and submit items as a transaction. |
| RDC User | User can create and scan items, but not submit them as a transaction. |
| RDS User | User can create, scan, and submit an item as a transaction. |
| RTG User | If enabled, third-party vendor files will be sent through Real Time Gateway. |
| Telephone Payment | A user can create a customer-authorized ACH payment received via the telephone. |
| View ACH Opt Out | A user will only be able to view a list of customers who have opted not to have their transactions processed as ACH items. |
| View ACH Opt Out Account | A user can view, add to, and/or edit the ACH Opt Out list, as well as view a customer's complete account number, instead of just the last four digits. |
| View Batch Images (Debits & Credit Report) | A user will have access to the batch image file to print, save, or view. |

After selecting the roles you wish to enable for the user, select **Update** to save all changes.

# Unlocking a User

Users can be locked out of the system if a password is keyed incorrectly at least five times, or if a user answered the secret question incorrectly when requesting a new temporary password.

As the Admin, you are responsible for unlocking user profiles so that they can access the system again. If an administrator becomes locked out, contact your first line of support for assistance. Follow the below steps to unlock a user's profile.

1. Log in and select **Admin | Users** from the left main menu.
2. Under the *Locked* column, select the **Unlock** link for that user. The link will disappear, and the user profile will be unlocked.

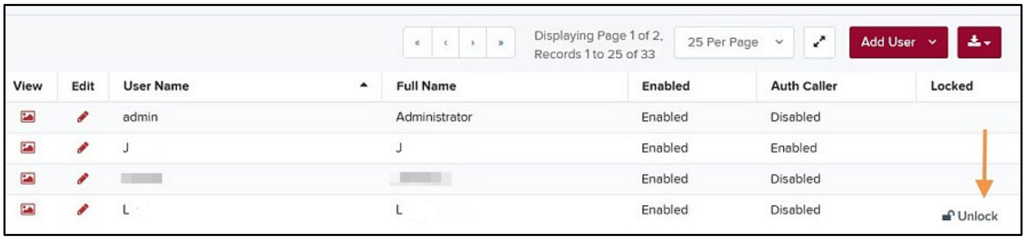


FIGURE 11 – UNLOCK OPTION

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**NOTE:** If the user needs a new password, you will need to reset the password following the steps in the "Resetting a Password" section.

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# Resetting a Password

Users may forget their password and ask you to provide them with a new, temporary one. The steps below explain how to reset a user's password.

1. Log in to the system.
2. Select **Admin** | **Users** from the left menu.
3. Select **Edit** to display the **Edit User** page.
4. Select **Reset Password** at the bottom of the page. The user's profile will have a case-sensitive temporary password generated.
5. Click the **Copy Password** to manually send the temporary password to a user, or click the **Copy Password Reset Link** to send the link.

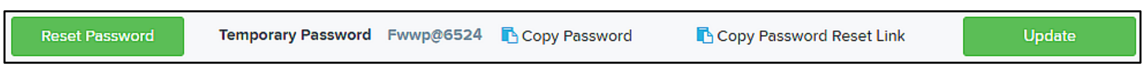


FIGURE 12 – SPB RESET PASSWORD BUTTON WITH COPY PASSWORD/COPY PASSWORD RESET LINK

# Disabling a User

Disabling a user keeps the profile intact until access is re-enabled by the Admin. The Admin may want to disable a user, for example, if that user is on leave for an extended period of time, before working with the application again.

1. Log in to the system, and select **Admin | Users** from the left main menu.
2. Select **Edit** for the user profile you wish to disable.
3. As shown below, uncheck the **Enabled** box in the *Update User Settings* section.

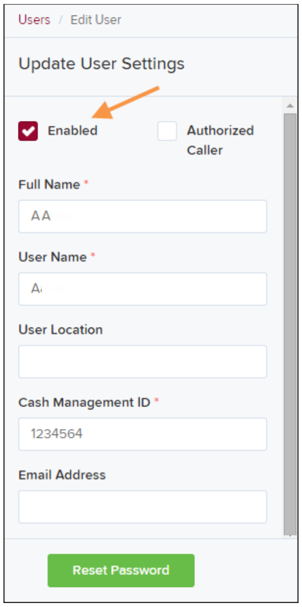


FIGURE 13 – DESELECTING THE ENABLED CHECK BOX

4. Select **Update** to save all changes.

## Deleting a User's Profile

Deleting a user profile will remove it from the list of users and make it inaccessible. The user name for that profile cannot be utilized again for a different user. The profile will be categorized as a deleted user.

**NOTE:** To delete an admin user, you must first remove the *Administrator* role from that administrator user's profile before completing the following steps.

1. Log in to the system and select **Admin | Users** from the left main menu.
2. Select **Edit** for the user profile to delete.
3. Select **Delete User**.

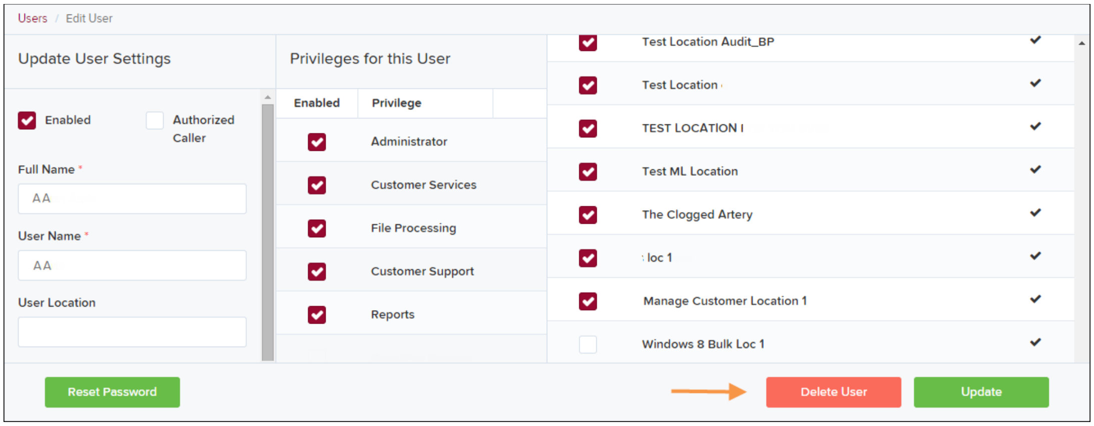


FIGURE 14 – DELETE USER OPTION

4. A prompt will ask you to confirm deleting a user. Select **Yes** to continue.


FIGURE 15 – DELETE USER CONFIRMATION

# Listing Deleted User Profiles

A list of the user profiles that you have deleted is available if you need to refer back to a previous user's profile information. This list will also provide the profile's audit history and any updates that may have been made to it.

1. Log in to the application, and then select **Admin | Users** from the left main menu.
2. In the *Merchant Users* section, select the **Deleted Users** option under *Filters*. The list of users will automatically update to display only deleted users.
3. Select **Clear Filters** to strip any filters from the list of users, as shown in the image below.

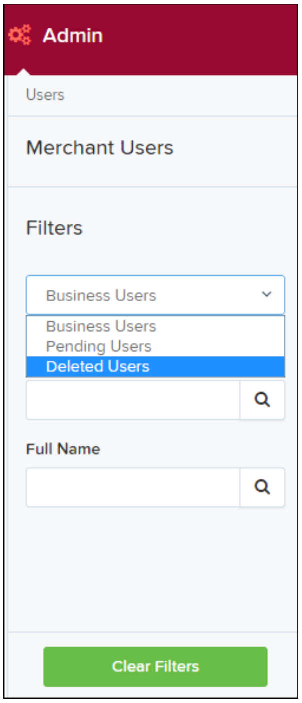


FIGURE 16 – DELETED USERS FILTER