Information Capsules for Using the EFT Platform

Topic: User Management

Before starting

Important: User management is an action reserved for the company's super administrator.

A user's role determines their privileges and access to the EFT application.
There are 2 types of roles: each company has a Super Administrator (SA). For companies with a four-eye (two approval tiers) or six-eye (three approval tiers) approval structure, there is also a User role (U).

Access	SA	U
Access transaction files	x	x
File importing	x	x
Template management	x	x
Transaction entry	x	x
File closures	x	x
User management	x	
Approval threshold management	x	
Transactions	x	x
Settlement report and business charges	x	
Search	x	x
Print	x	x

Permissions	SA	U
Entry/Verification/Approval	x	x
File closures	x	x
Template Creation/Modification/Approval	x	x
File importing	x	x
Create/Edit/Delete/Disable users	x	
Password reactivation	x	
Report generation	x	x

Adding a user

Step 1

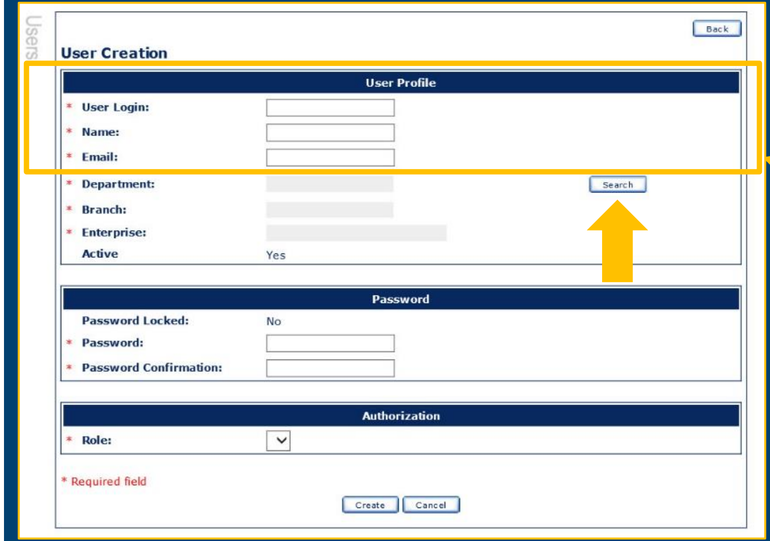
In the Administration tab, select the User Management section.

You will then be directed to the page below. On this page, click “**Add.**”

Adding a user

Step 2

Fill in the following fields: **User Login, Name and Email**



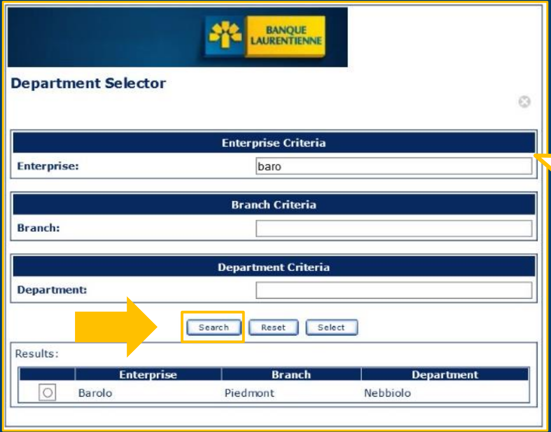
Note:
Fields marked with an asterisk **(*)** are **mandatory**.

To complete the Department, Branch and Enterprise fields, click **“Search.”**

Adding a user

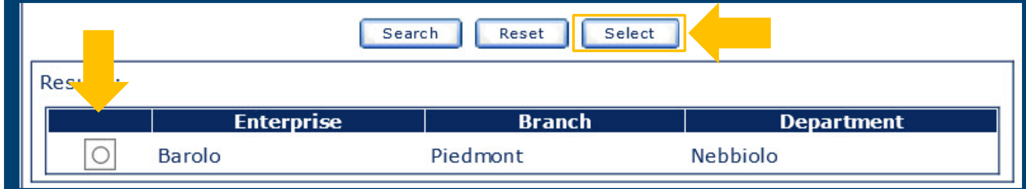
Step 3

To complete Enterprise, Branch and Department fields, enter your company's name in the Enterprise Name field and click "**Search.**"



Tip:
Search for your company by entering the first three characters and clicking "**Search.**"

The search results will appear at the bottom of the page. Check the item that corresponds to your company and click **"Select."**



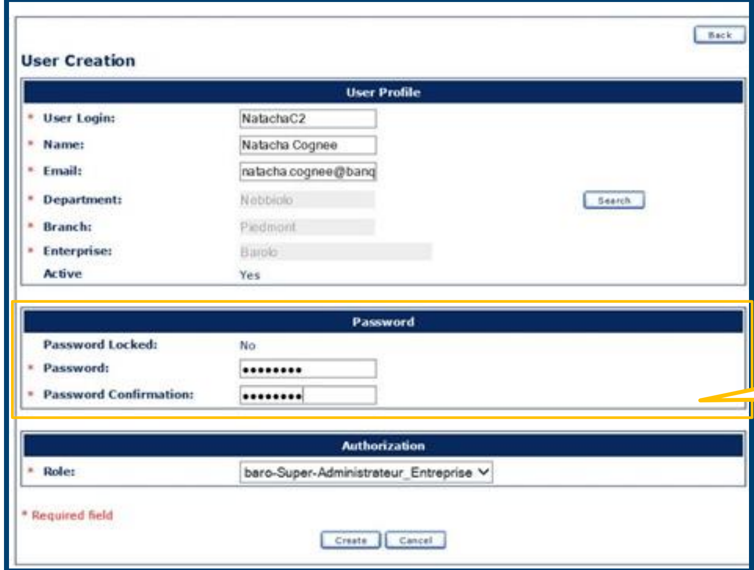
The information will be automatically copied to the corresponding fields on the User Creation screen (see next page).

For additional support, call 514-522-6355 or 1-855-591-4797.

Adding a user

Step 4

Enter the new user’s password in the **Password** field.



Key points:

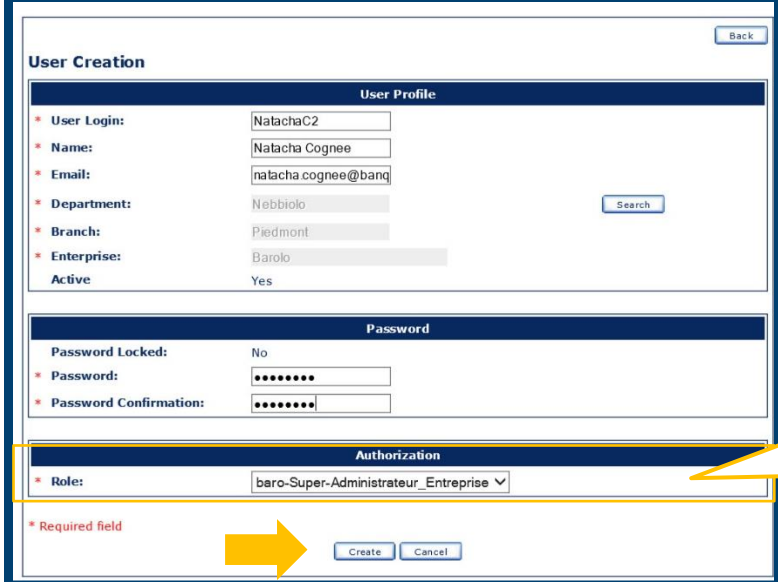
Password must at least 8 characters long: 1 lowercase and uppercase letter, 1 number and 1 special character ($%?).

Re-enter the password in the **Password Confirmation** field.

Adding a user

Step 5

Select the new user's **role** from the drop-down menu in the Authorization section.



Note:

For a one-approver platform, the only role available is *Super Administrator*. A platform with two or more approvers also includes the *User* role. This role does not permit user management.

Click **"Create"** to confirm the creation of the user. Your user has been created.

Editing a user

Editing a user

Step 1

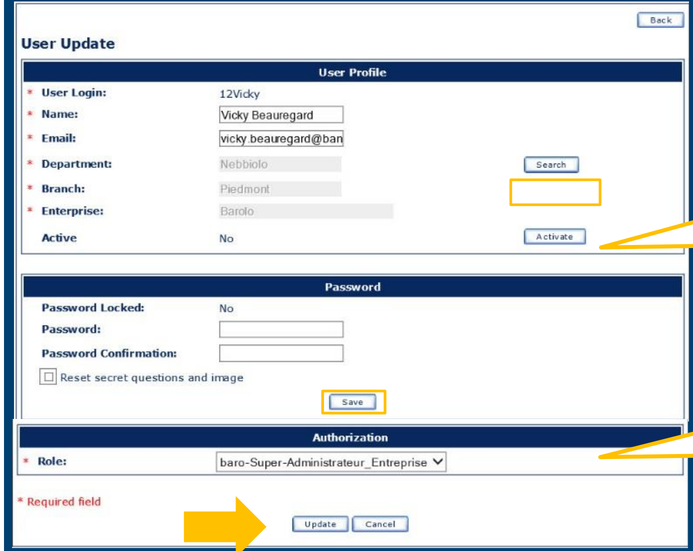
On the User Management screen, click the name of the user to edit.

You will be taken to the **User Update** page (see next slide).

Editing a user

Step 2

Make the desired changes in the appropriate fields.



Note:

To disable or enable a user, click the "**Deactivate**" or "**Activate**" button. The user's name remains in the list and the deactivation date is displayed (see next page).

Note:

To reset a password, enter the user's new temporary password and re-enter it in the **Password Confirmation** field. Click "**Save.**"

Once the changes have been completed, click "**Update.**"

Editing a user

Step 3

Here is an overview of the user list:

User Management

User Login	Name	Role	Deactivation Date	Status
12345Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
1234Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
123Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
12Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise	2022/03/01	
1Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
456Vicky	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
AnnieDO	Annie Des Ormeaux	baro-Super-Administrateur_Entreprise		
Barolo1971	Marie-Claude	baro-Super-Administrateur_Entreprise		
beauregardv	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
BeauregV	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
GillesT	Gilles	baro-Super-Administrateur_Entreprise		
NatachaC	Natacha Cognee	baro-Super-Administrateur_Entreprise		
NatachaC2	Natacha Cognee	baro-Super-Administrateur_Entreprise		
vbeauregard	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
Vicky123	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
Vicky1234	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
vickyb	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
VickyBeau	Vicky Beauregard2	baro-Super-Administrateur_Entreprise	2022/02/02	
ZVicky123	Vicky Beauregard	baro-Super-Administrateur_Entreprise		
ZZVicky123	Vicky Beauregard	baro-Super-Administrateur_Entreprise		

It is available at all times and provides an overview of the users, their role and their deactivation date, if applicable.