

Information Capsules for Using the EFT Platform

Topic: User Management



LAURENTIAN
BANK

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



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

Adding a user

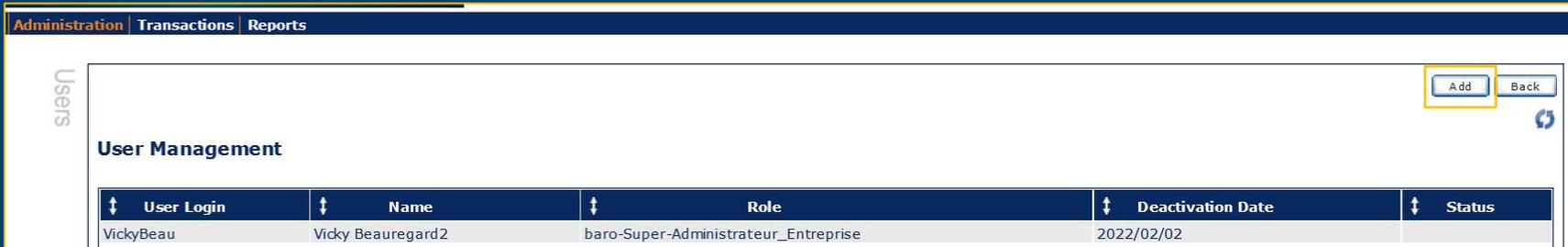
Step 1

In the Administration tab, select the User Management section.



The screenshot shows the top navigation bar with the Banque Laurentienne logo and the 'Administration' tab selected. Below the navigation bar, a sidebar menu is visible with 'User Management' highlighted by a yellow arrow. The main content area shows a list of options: 'User Management' and 'Individual approval limit management'.

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



The screenshot shows the 'User Management' page. The 'Add' button is highlighted with a yellow box. Below the page title, there is a table with the following data:

User Login	Name	Role	Deactivation Date	Status
VickyBeau	Vicky Beaugard2	baro-Super-Administrateur_Entreprise	2022/02/02	

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

Adding a user

Step 2

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

The screenshot shows a web form titled "User Creation" with a "Back" button in the top right corner. The form is divided into three main sections: "User Profile", "Password", and "Authorization".

- User Profile:** This section contains fields for "User Login", "Name", and "Email", each marked with a red asterisk (*). Below these are fields for "Department", "Branch", and "Enterprise", also marked with red asterisks. A "Search" button is located to the right of the Department field. A yellow box highlights the User Login, Name, and Email fields, and a yellow arrow points to the Search button.
- Password:** This section contains a "Password Locked" field (set to "No") and two fields for "Password" and "Password Confirmation", both marked with red asterisks.
- Authorization:** This section contains a "Role" field with a dropdown arrow, marked with a red asterisk.

At the bottom left of the form, there is a red asterisk and the text "* Required field". At the bottom center, there are "Create" and "Cancel" buttons.

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.”**

Department Selector

Enterprise Criteria
Enterprise: baro

Branch Criteria
Branch:

Department Criteria
Department:

Search Reset Select

Results:

	Enterprise	Branch	Department
<input type="checkbox"/>	Barolo	Piedmont	Nebbiolo

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.”**

Search Reset Select

Results:

	Enterprise	Branch	Department
<input type="checkbox"/>	Barolo	Piedmont	Nebbiolo

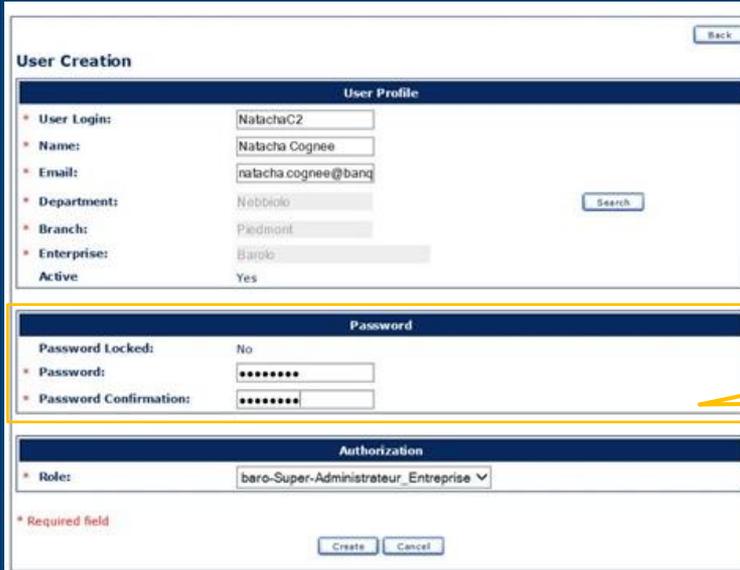
The information will be automatically copied to the corresponding fields on the User Creation screen (see next page).



Adding a user

Step 4

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



The screenshot shows a 'User Creation' form with three main sections: 'User Profile', 'Password', and 'Authorization'. The 'User Profile' section contains fields for User Login (NatachaC2), Name (Natacha Cognee), Email (natacha.cognee@banq), Department (Nebbiolo), Branch (Piedmont), Enterprise (Barolo), and Active (Yes). The 'Password' section contains fields for Password Locked (No), Password (masked with dots), and Password Confirmation (masked with dots). The 'Authorization' section contains a Role dropdown menu set to 'baro-Super-Administrateur_Entreprise'. A 'Back' button is in the top right, and 'Create' and 'Cancel' buttons are at the bottom. A red asterisk indicates a required field.

Key points:

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

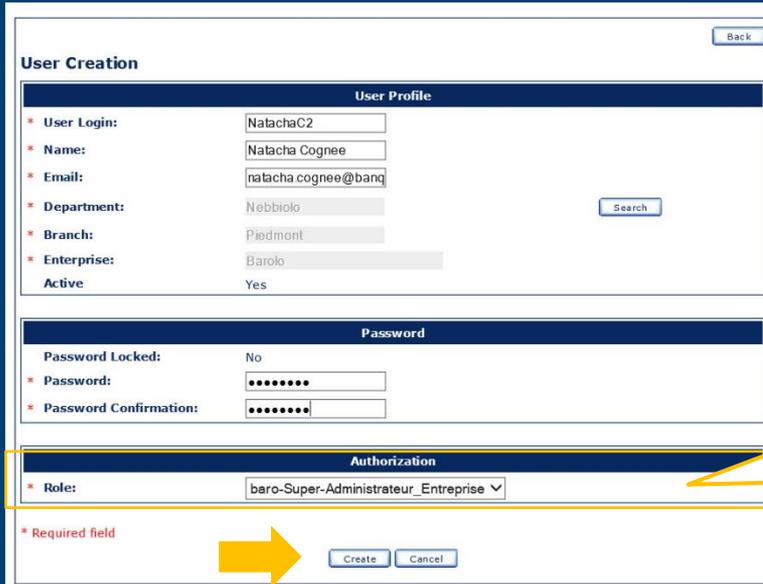
Re-enter the password in the **Password Confirmation** field.



Adding a user

Step 5

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



The screenshot shows a 'User Creation' form with three main sections: 'User Profile', 'Password', and 'Authorization'. The 'Authorization' section is highlighted with a yellow box and a yellow arrow pointing to the 'Role' dropdown menu, which is currently set to 'baro-Super-Administrateur_Enterprise'. A red asterisk indicates that the 'Role' field is required. Below the form, there are 'Create' and 'Cancel' buttons. A yellow arrow points from the 'Create' button towards the right.

User Profile	
* User Login:	NatachaC2
* Name:	Natacha Cognee
* Email:	natacha.cognee@banq
* Department:	Nebbiolo <input type="button" value="Search"/>
* Branch:	Piedmont
* Enterprise:	Barolo
Active	Yes

Password	
Password Locked:	No
* Password:
* Password Confirmation:

Authorization	
* Role:	baro-Super-Administrateur_Enterprise

* Required field

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.



The screenshot displays the 'User Management' interface. At the top, there is a navigation bar with 'Administration', 'Transactions', and 'Reports'. Below this, the 'Users' section is visible, containing a table of users. A yellow arrow points to the 'Name' column of the second row in the table.

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	

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.

The screenshot shows the 'User Update' form with three main sections: 'User Profile', 'Password', and 'Authorization'. A yellow box highlights the 'Name' field in the 'User Profile' section. A yellow box highlights the 'Activate' button in the 'User Profile' section. A yellow box highlights the 'Save' button in the 'Password' section. A yellow arrow points to the 'Update' button at the bottom of the form. A red asterisk and the text '* Required field' are visible next to the 'Role' dropdown in the 'Authorization' section.

User Profile	
* User Login:	12Vicky
* Name:	Vicky Beauregard
* Email:	vicky.beauregard@baro
* Department:	Nebbolo
* Branch:	Piedmont
* Enterprise:	Barolo
Active:	No

Password	
Password Locked:	No
Password:	
Password Confirmation:	
<input type="checkbox"/> Reset secret questions and image	

Authorization	
* Role:	baro-Super-Administrateur_Entreprise

* Required field

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 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.

