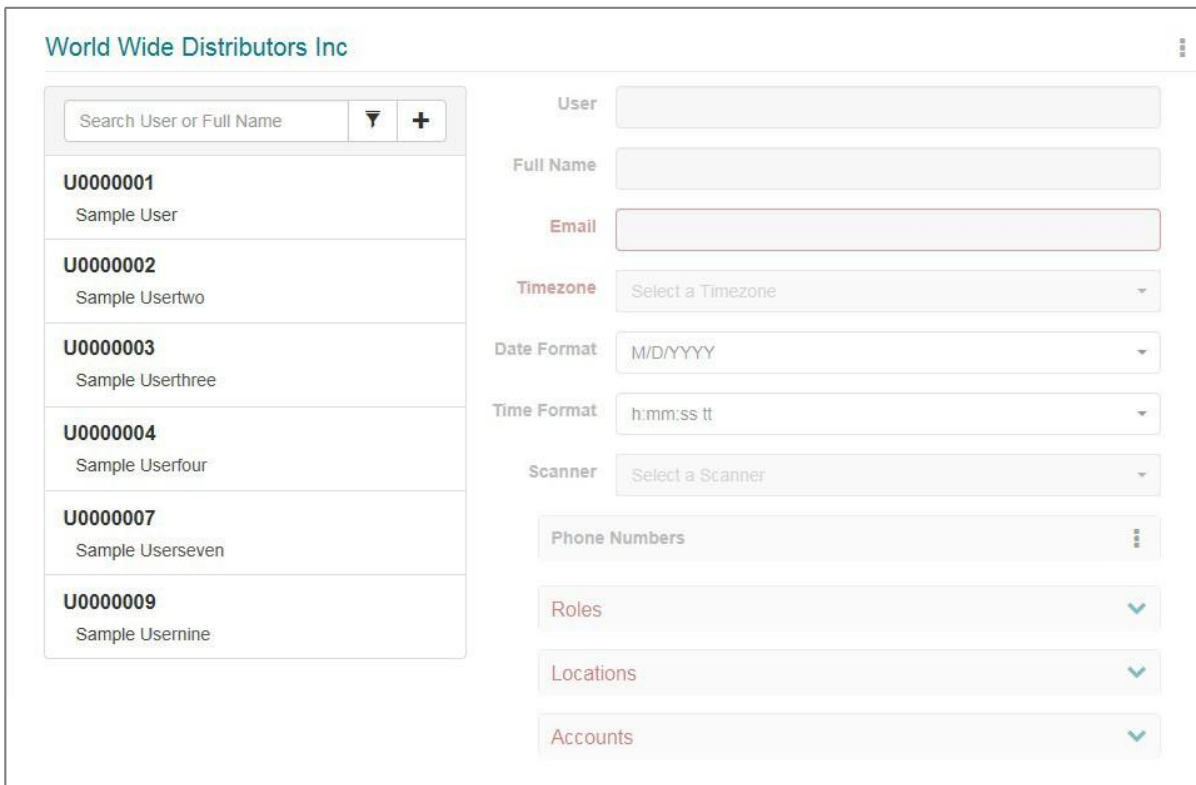


DirectLink Merchant Remote Deposit Capture

Admin User Guide

About User Administration

The User Administration page enables you to add new users, edit existing users, or remove users. To access the page, click Administration from the navigation bar.



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Search User or Full Name  

U0000001 Sample User	User
U0000002 Sample Usertwo	Full Name
U0000003 Sample Userthree	Email
U0000004 Sample Userfour	Timezone
U0000007 Sample Userseven	Date Format
U0000009 Sample Usernine	Time Format
	Scanner
	Phone Numbers
	Roles
	Locations
	Accounts

On this page:

- ◆ The left pane shows the list of users and provides options for filtering the list.
- ◆ The right pane shows the user profile fields. When you open the page, the fields are blank and disabled. If you add a new user, the fields become editable. If you select an existing user to work with, the fields are updated with the values for that user.

User profiles include the email address used for sending password reset emails and deposit notifications; the roles that grant access to DirectLink Merchant features; and the locations and accounts the user can access for making deposits, running reports, and doing research. In addition, the user profile must include at least one phone number.

User Roles

Roles are defined by your system administrator and may vary. The following is an example of the Select Roles window, with common roles that might be defined based on job function. Consult with your system administrator for more information.

Select Roles

☐ Advanced Operator

User's deposits will skip Merchant Deposit Review

☐ Approver

User can reject/approve deposit flagged for review

☐ Desktop Operator

User can capture deposits on a desktop

☐ History Administrator

User can research and build queries

☐ Mobile Web Operator

User can capture deposits using a mobile browser

☐ Researcher

User can run reports and research all deposits

☐ Reviewer

User can run reports and research own deposits

☒ User Administrator

User that can add and remove other users

☐ User Manager

User that can manage existing users

Cancel

Done

Adding Users

If you have the appropriate user rights, you can add new users to the system by clicking the add icon () in the left pane. You provide values for the user name, full name, and email address. You also add one or more phone numbers, assign a default scanner, and assign one or more roles, locations, and accounts.

Note that you can only assign the locations and accounts that have been assigned to you.

► Add a New User

-  If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
-  In the left pane, click the add icon () to update the right pane with the fields for adding a new user.

- + In the User field, type the logon ID for the user.
This is what the user will use in combination with a password to log on to the system.
- + In the Full Name field, type the full name for the user.
- + In the Email field, type the email address for the user.
This email address is used for password resets and other system emails, so it is important to verify what you typed is correct.
- + Configure the time zone and date/time format settings for the user:
 - a. From the Time zone drop-down list, select the appropriate time zone for the user's location.
For example, if you were located on the east coast of the United States and were observing Daylight Saving Time, you would choose Eastern Daylight Time.
 - b. From the Date Format drop-down list, select the appropriate date format.
For example, if you select MM/DD/YYYY (two digit month, two digit day, four digit year), the system would format February 1, 2020 as 02/01/2020.
 - c. From the Time Format drop-down list, select the appropriate time format.
H represents hours in a 24 hour format. (For example, 5:00pm is 17). h represents hours in a 12 hour format and is typically paired with tt, (AM or PM). mm represents minutes.

These settings determine how dates and times are displayed in DirectLink Merchant. For example, when users search for deposits, they can specify a Start Date. When users view search results, they can see the date and time when a deposit is submitted. When users log on to the system, they are shown the last date and time they logged on. These dates and times are all formatted according to these settings. Note however that these settings do not affect virtual deposit tickets or emails sent by the system. Also note that users can change these settings in their user profile as necessary.
- + From the Scanner drop-down list, select a default scanner for the user.
If you select a network scanner, such as Panini mI:Deal or EverNext, the system updates the page with the Scanner Host field. You must also provide an IP address or hostname value for the network scanner in this field.
- + If you want to add a phone number, do the following:
 - a. In the Phone Numbers section, click the menu icon () and select Add to show the fields for adding a phone number.
 - b. In the Name field, type a description for this number.
For example, you could type **Office** for the user's office phone, or **Mobile** for the user's cell phone.

- c. From the Country Code drop-down list, select the country for the phone number. For example, you could select United States. The system uses this value to apply the correct country code when making calls for user authentication purposes.
 - d. In the Phone Number field, type the phone number with area code, omitting spaces. You can include dashes or omit them. For example:
888-555-6824
or
8885556824
 - e. If the phone number has an extension, type that value in the Ext field.
- + Click the add icon (). The phone number is required.
- + Assign the roles to the user profile:
 - a. Click the more icon () for the Roles section to open the Select Roles window.
 - b. Select check boxes for each of the roles you want to assign to the user. You can also click the menu icon () and Select All to select all check boxes at once.
 - c. Click Done to save your selections and close the window.
- + Add the locations to the user profile:
 - a. Click the more icon () for the Locations section to open the Select Locations window.
 - b. Select check boxes for each of the locations you want to assign to the user. You can also click the menu icon () and Select All to select all check boxes at once.
 - c. Click Done to save your selections and close the window.
- + Add the accounts to the user profile:
 - a. Click the more icon () for the Accounts section to open the Select Accounts window.
 - b. Select check boxes for each of the accounts you want to assign to the user. You can also click the menu icon () and Select All to select all check boxes at once.
 - c. Click Done to save your selections and close the window.

- + If you want to change the order of the locations or accounts, do one of the following:
 - Click in the list number field for the item you want to change, and drag the item up or down in the list to change its position.

For example, if you have assigned four accounts, and you want to make the last one in the list show up as the first one, you would click in the field with the number 4, hold down with your mouse, and drag the list item to the first position in the list. The system then assigns that list item a number 1, with the other accounts reordered as appropriate.
 - Click in the list number field for an item, and type a new number value for that item.

For example, if you have assigned access to three locations, and you want to make the first item in your list the last item in your list, you would click in the field for the first position and change the value from 1 to 3.

Note however, that users can manage the order of locations and accounts for themselves when working with their user profiles, so this step is optional.
- + When finished, click Save.

Working with Existing Users

Once users have been added to the system, you can work with them in the following ways:

- ◆ You can edit user profiles to update user information or assign different roles, locations, or accounts.

Note that you cannot change the user name for a profile once that profile has been saved. If you need to change a user name, you must delete the existing profile and create a new one with the new name.
- ◆ You can disable users, or make disabled or locked users active again.
- ◆ You can reset user passwords, for instances where users have forgotten their password. When you reset a user's password, the system sends an email notification with a link to the self-service password reset page. This notification is sent to the email address in that user's profile.
- ◆ You can reset user security questions, for instances where users have forgotten the answers to their security questions and can no longer log on to the system.

When you reset a user's security questions, the system sends an email to the email address in that user's profile.
- ◆ You can remove users.

Note that the features you can access depend on the roles that have been assigned to you. You may only be able to add and remove users, or to disable users, reset users, and reset their passwords and security questions.

Selecting Users to Work With

By default, when you access the Administration page, the system lists all the users for your merchant. You can use the search field and filter icon to more easily find a specific user.

Type the user name or the full name into the field to limit the list to items containing that string of characters.

As soon as you start typing a value, the list updates based on what you typed.

Merchant Users

▼ +

U0000001 Sample User	Filter by ☒ Disabled ☒ Enabled ☒ Locked Cancel Apply
U0000002 Sample Usertwo	
U0000003 Sample Userthree	
U0000004 Sample Userfour	
U0000007 Sample Userseven	
U0000009 Sample Usernine	

Click the filter icon to open a window that enables you to show disabled users, enabled users, and locked users.

Administrators often use these options to quickly locate disabled or locked users, so that they can reset them.

► Edit a User

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described in the previous section.
3. If you want to change user's full name, type a new value in the Full Name field.
4. If you want to change the user's email address, type a new value in the Email field.
Note that the email address is used to send emails for password resets, so it is important to verify what you typed is correct.
5. If you want to change the time zone and date/time format settings for the user, do the following:
 - a. From the Time zone drop-down list, select the appropriate time zone for the user's location.
For example, if you were located on the east coast of the United States and were observing Daylight Saving Time, you would choose Eastern Daylight Time.
 - b. From the Date Format drop-down list, select the appropriate date format.
For example, if you select MM/DD/YYYY (two digit month, two digit day, four digit year), the system would format February 1, 2020 as 02/01/2020.
 - c. From the Time Format drop-down list, select the appropriate time format.
H represents hours in a 24 hour format. (For example, 5:00pm is 17). h represents hours in a 12 hour format and is typically paired with tt, (AM or PM). mm represents minutes.

These settings determine how dates and times are displayed in DirectLink Merchant. For example, when users search for deposits, they can specify a Start Date. When users view search results, they can see the date and time when a deposit is submitted. When users log on to the system, they are shown the last date and time they logged on. These dates and times are all formatted according to these settings. Note however that these settings do not affect virtual deposit tickets or emails sent by the system. Also note that users can change these settings in their user profile as necessary.
6. If you want to change the default scanner assigned to the user, select a new value from the Scanner drop-down list.
If you select a network scanner, such as Panini ml:Deal or EverNext, the system updates the page with the Scanner Host field. You must also provide an IP address or hostname value for the network scanner in this field.

7. If you want to add a phone number, do the following:
 - a. In the Phone Numbers section, click the menu icon () and select Add to show the fields for adding a phone number.
 - b. In the Name field, type a description for this number.
For example, you could type **Office** for the user's office phone, or **Mobile** for the user's cell phone.
 - c. From the Country Code drop-down list, select the country for the phone number. For example, you could select United States. The system uses this value to apply the correct country code when making calls for user authentication purposes.
 - d. In the Phone Number field, type the phone number with area code, omitting spaces. You can include dashes or omit them. For example:
888-555-6824
or
8885556824
 - e. If the phone number has an extension, type that value in the Ext field.
 - f. Click the add icon () to add the number to the list. The phone number is required.
8. If you want to remove a phone number, do the following:
 - a. Under the Phone Numbers section, select the check box for the phone number you want to remove.
 - b. Click the menu icon () and select Remove.
9. If you want to change the roles that are assigned to the user, do the following:
 - a. Click the more icon () for the Roles section to open the Select Roles window.
 - b. Select check boxes for each of the roles you want to assign to the user, and clear the check boxes for any of the roles you want to remove.
You can also click the menu icon () and Select All to select all check boxes at once or Unselect All to clear all the check boxes.
 - c. Click Done to save your selections and close the window.

10. If you want to change the locations that are assigned to the user, do the following:
 - a. Click the more icon () for the Locations section to open the Select Locations window.
 - b. Select check boxes for each of the locations you want to assign to the user, and clear the check boxes for any of the locations you want to remove.
You can also click the menu icon () and Select All to select all check boxes at once or
Unselect All to clear all the check boxes.
 - c. Click Done to save your selections and close the window.
11. If you want to change the accounts that are assigned to the user, do the following:
 - a. Click the more icon () for the Accounts section to open the Select Accounts window.
 - b. Select check boxes for each of the accounts you want to assign to the user, and clear the check boxes for any of the accounts you want to remove.
You can also click the menu icon () and Select All to select all check boxes at once or
Unselect All to clear all the check boxes.
 - c. Click Done to save your selections and close the window.
12. If you want to change the order of the locations or accounts, do one of the following:
 - Click in the list number field for the item you want to change, and drag the item up or down in the list to change its position.
For example, if you have assigned four accounts, and you want to make the last one in the list show up as the first one, you would click in the field with the number 4, hold down with your mouse, and drag the list item to the first position in the list. The system then assigns that list item a number 1, with the other accounts reordered as appropriate.
 - Click in the list number field for an item, and type a new number value for that item.
For example, if you have assigned access to three locations, and you want to make the first item in your list the last item in your list, you would click in the field for the first position and change the value from 1 to 3.
Note, however, that users can manage the order of locations and accounts for themselves when working with their user profiles, so this step may not be necessary.
13. When finished making updates, click Save.

► **Disable a User**

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described on page 7.
3. Click the menu icon () for the user profile, and select Disable User.
The system displays a message that the user's status was changed successfully, and the icon to the right of the user name changes to reflect the disabled status.

► **Make a Disabled or Locked User Active Again**

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described on page 7.
3. Click the menu icon () for the user profile, and do one of the following:
 - If the user was disabled, select Enable User.
 - If the user was locked, select Unlock User.The system displays a message that the user's status was changed successfully, and the icon to the right of the user name changes to reflect the active status.

► **Reset a User's Password**

Once you initiate this process, the user will be required to change the password, even if the user remembers the current password and successfully logs in using it. A user can only change the password once every 24 hours.

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described on page 7.
3. Click the menu icon () for the user profile, and select Reset Password.
4. When prompted to confirm, click OK.
The system displays a message that the user's password has been changed successfully and sends an email notification to the user. The notification is sent to the email address in the user's profile.

At this point, the user should complete the following steps:

1. Locate the email and click on the button (or copy and paste the URL into the address bar on the browser). The user should be redirected to the Security Question page. The link in the email expires after the period established by your institution.
2. Type the appropriate answer to the security question.
3. Click on the Continue button. The system displays the Reset Password page.
4. In the New Password field, type the appropriate password.
5. In the Confirm Password field, re-type the same password.
6. Click the Submit button. The system should display a confirmation message and generate a confirmation to the user's email address.

► **Reset a User's Security Questions**

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described on page 7.
3. Click the menu icon () for the user profile, and select Reset Questions.
The system resets the user's security questions, and it sends an email notification to the user indicating the security questions have been reset.

► **Delete a User**

1. If you haven't already done so, log onto DirectLink Merchant and select Administration from the navigation bar to show the fields for working with users.
2. From the list of users, select the user you want to work with.
You can use the search field or filter button to find a specific user, as described on page 7.
3. Click the menu icon () for the user profile, and select Delete User.
4. When prompted to confirm, click OK.