BankFinancial[SM]

LBXCentral
Image Archive
Administrator Guide
and
Notification's Administrator Guide

Version 7.0

BankFinancial

Table of Contents

Introduction

Welcome to BankFinancial secure LBXCentral interface providing access to lockbox image archive and reporting. This guide has been created to familiarize the company designated Administrators with the functionality and responsibilities associated with LBXCentral, including user maintenance, group maintenance, data searches, reporting, and efficient and effective access of your image archive.

The LBXCentral application consists of four modules: *Long Term Archive (LTA), Client Decisioning Module (CDM)*, *Post Processing Work (PPW)* and *Reporting*.

IMPORTANT NOTE: Some information in the displays has been altered to protect confidential information.

Getting Started

Check Computer Software

To view images stored on the check archive you must have two different types of free software installed. They are:

Browser

- Internet Explorer – Versions 9, 10 and 11
- Chrome
- Firefox

Reader

- Adobe Acrobat Reader – Versions 9, 10 and 11

This software is available free of charge via the Internet. If you are not allowed to or cannot download the software please contact your desktop support group for assistance.

Log In

Note that the following log in information does not apply to users that access LBXCentral via SSO.

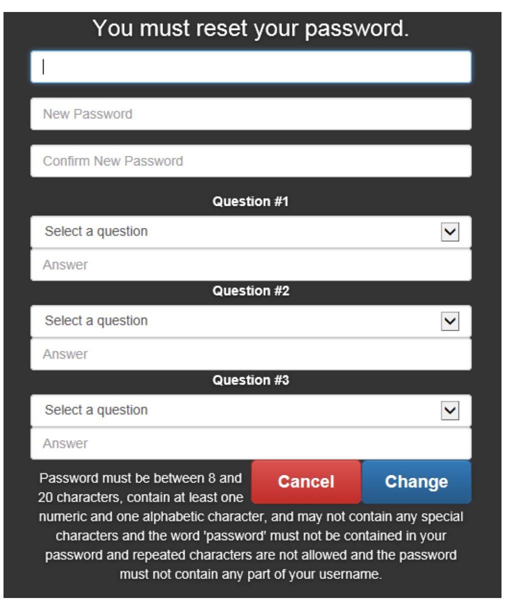
Access LBXCentral via an internet browser with the appropriate URL, user name and temporary password provided by the System Administrator. The log in page appears.

Password Information

Users will be prompted to create a new unique password. Some groups may require an additional step to allow users to access the application, this is called multi-factor authentication. LBXCentral offers two different kinds of authentication:

1. **One time passwords** (OTP) – New users will be sent a password via email and will then be prompted to enter the OTP during login. Once the OTP is entered, the information is stored in the user cookie and will be used on all future logins (except when cookies are reset or for shared desktop computers).

2. **Challenge response questions** – New users select three questions and answers from a list. They will be prompted to answer one of the questions during each login. The following page will display on initial entry into the application, requiring a new password and the challenge questions and responses.



All passwords must be at least eight (8) characters in length, contain at least one upper-case letter, one lower-case letter, and include at least one alpha and one numeric character. It cannot contain the word 'password' and it must not contain repeated characters (examples: ***Password**1;* jackie***555***).

Protect Your Password - It is important to protect login information. Your password is your personal access key into the system. Do not share or reveal your password to unauthorized personnel. Do not leave your login information on your desk or in public view. This creates a breach in system security which could allow unauthorized access to proprietary information.

Password Expiration

All passwords automatically expire every 60 days. When your password expires, you will be prompted to change it.

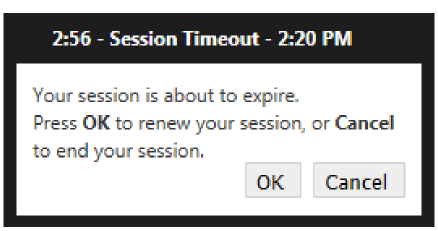
To maintain site security, it is recommended passwords be reset anytime there is a possibility a password or login information may have been revealed to unauthorized personnel.

Simultaneous Logins Not Allowed: Your User ID and Password can only be logged into the Archive once from any workstation. If you login to another workstation using the same User ID and password, the application running on the original workstation expires and will log you out. In other words, your latest active session will always be valid.

After log in is complete, the home page, or landing page is visible. Please take a moment to become familiar with a few of the features of the home page.

Session Timeout

The system will time out after 15 minutes of inactivity – a warning message will appear three minutes prior to time out:



Three unsuccessful log in attempts will lock the user out of the system. At that point, the user must contact their Company Administrator to have the password reset.

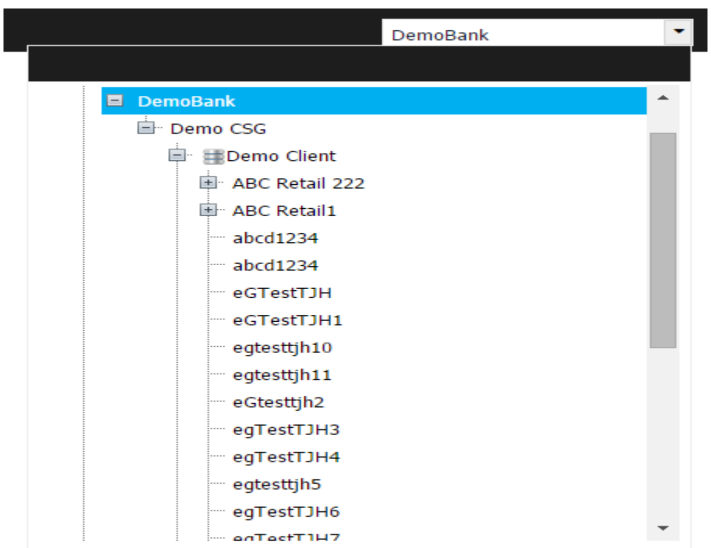
Home Page Overview

The home page reflects a menu bar with the entitled features for each user. The following provides a brief description of the main areas of the home page.

Group Selection Bar

To the right of the Main Tool bar on the Home page is the ***Group*** drop down selection bar. The search box next to the dropdown arrow allows users to enter the name of the group or partial name for a quick look-up.

Groups allow definition of an organization's data hierarchy. It is in this section where the company Administrator establishes a user's permissions to LBXCentral. You may entitle any user to all access or restrict the user to a selected group of lockboxes.



The top level, **Generic Bank** in this example, is mostly used for Administration – user maintenance, user activity reports, etc. Archive searches are not conducted at this level.

The second level, **Demo Bank** in this example, is the main search level. It is from this level that archive searches by both Administrators and users may be conducted for all archived data.

The third and consecutive levels recognize the data for each separate subgroup of the company. The Administrator may establish user entitlements restricted to a specific group or subgroups.

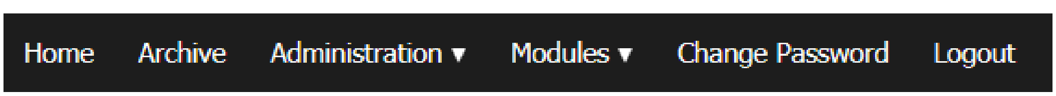
The level of entitlement established will determine the view the user sees when accessing LBXCentral.

Access granted at one level provides access to all lower levels of the application. In this example, if a user's access is granted at the **Generic Bank** level, the user would have access to all lower levels (for example, the company Administrator). However, if the user's access is granted at the lowest level – **ABC Retail**, that user will only have access to work processed for **ABC Retail**.

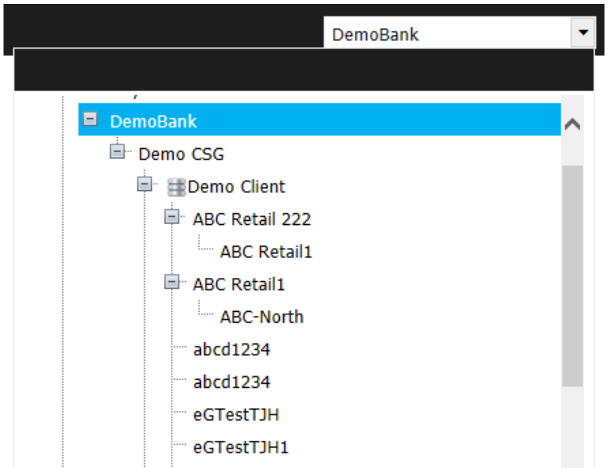
Broadcast Messages

Broadcast messages may appear when the company has important information to share or when the Administrator has an important message for the staff using the application. This box appears on the left side of the home page. The system Administrator can create Broadcast messages to all users or to specific users, as needed. Please refer to the **Group Maintenance** section for more information.

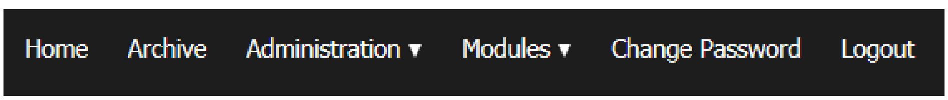
Main Tool Bar



The **Main Tool Bar** is located in the top center of the website page. There are different Tool Bars depending upon which level of hierarchy the user is accessing. The one listed above is from the top level of information (DemoBank, in the example below). It is from this level in the Administration section where User Maintenance is accessed. Normally, only Administrator-related searches are made from this level; such as user activity reports, etc.



In addition, once the user accesses the other levels of information, a different Tool Bar will display. Listed below is the Tool Bar visible from the lower levels of company information (for instance, Demo Client, ABC Retail, etc.). The features will vary from user to user, depending upon the user's established roles.



A brief summary of each the Tool Bar function is listed below:

Home – The *Home* screen allows a user to select a group from the dropdown menu located on the right. A user can also type in a group name (or partial name) in the box next to the dropdown and select the appropriate group from the search results. A user defaults to the group that was selected at last login.

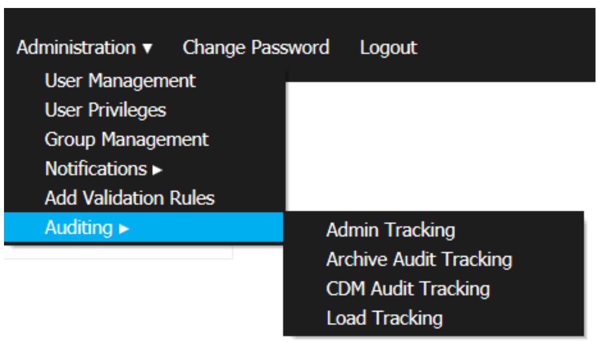
The user can select the application (described below) from the menu bar. The screen also shows any broadcast messages.

Selecting the *Home* option will return the user to the home page from any page within the application.

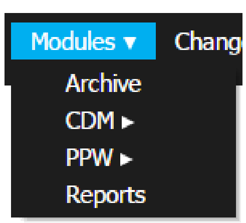
Archive – *Archive* allows access to multiple search options for data and images. Users can access the archive of images from this option, or within the *Archive* dropdown under *Modules*.
Note that the terms Archive, Long Term Archive and LTA are interchangeable.

Administration – The *Administration* module provides the Administrator with the tools to create, modify and delete users, provide specific entitlements for the user, manage group information and reports showing the activity of the users in the various sections of the application.

Auditing is also available from the Administration module. Auditing will be available to all users; however, Administrators may restrict certain auditing features for users.



Modules – The *Modules* selection on the main tool bar allows users to navigate to the various work areas of LBXCentral to which the user is granted permissions. Refer to the LBXCentral User Guide for details of each module.



Change Password – Allows the user to change their password at any time.

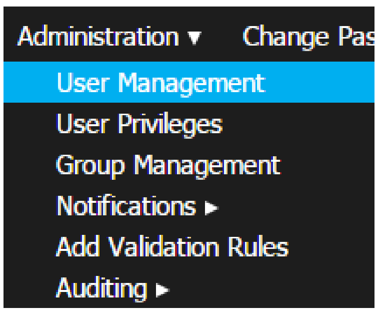
Reminder: Passwords must be between 8 and 50 characters, contain at least one upper-case letter, one lower-case letter and one number. It cannot contain repeat characters or the word ‘password’.

Logout – Signs the user out of the system.

LBXCentral Administration

Note: LBXCentral offers several optional administrative modules, including **Stop File Management**, **CDM Sweep Management** and **Add Validation Rules.** These modules will be viewable only if they are enabled. Once enabled, detailed instructions will be provided.

User Management

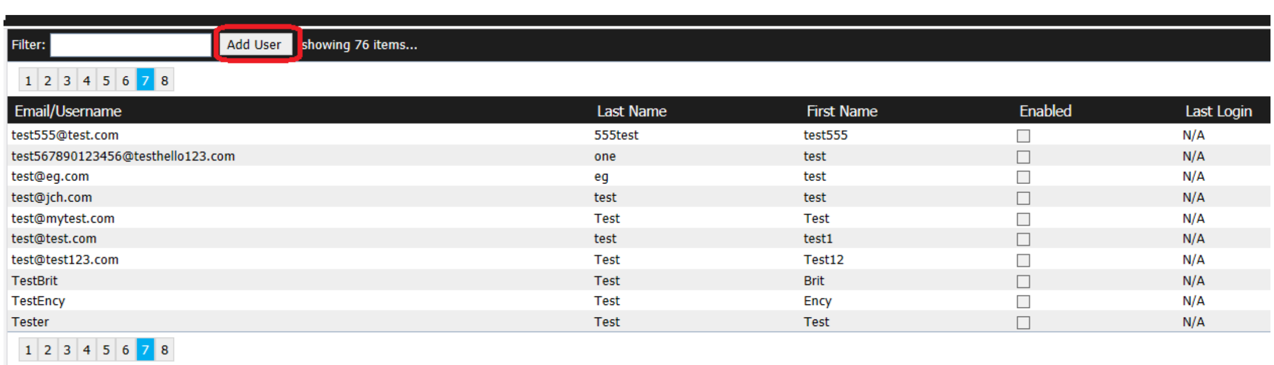


User Management is the area within LBXCentral where the Administrator creates, modifies or deletes users. Only those users entitled as Administrator–level users will have this option.

When **User Management** is opened, the list of any existing users is displayed. Each user's name is displayed as a hyperlink. Clicking on any user listed will open that user's profile and display all entitlements granted to that user.

At the first log on, the Administrator will be responsible for creating other users and establishing the entitlements for each.

Add User



Filter: Add User showing 76 items...

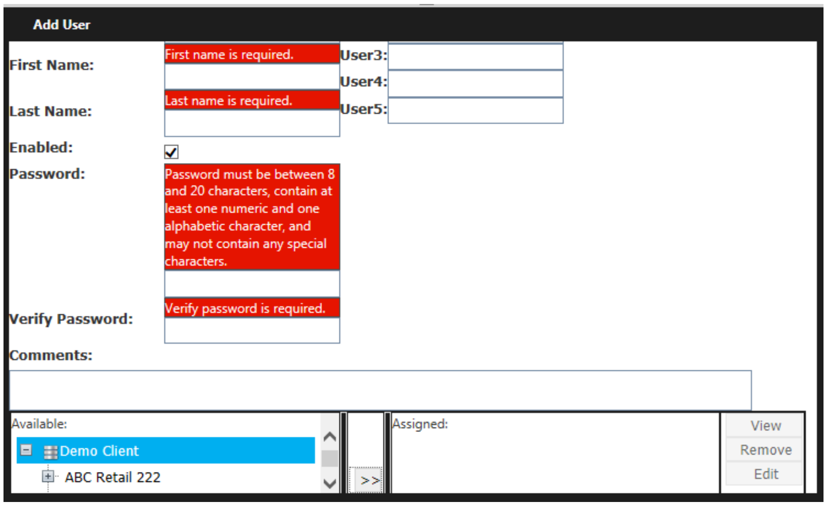
1 2 3 4 5 6 7 8

Email/Username	Last Name	First Name	Enabled	Last Login
test555@test.com	555test	test555	☐	N/A
test567890123456@testhello123.com	one	test	☐	N/A
test@eg.com	eg	test	☐	N/A
test@jch.com	test	test	☐	N/A
test@mytest.com	Test	Test	☐	N/A
test@test.com	test	test1	☐	N/A
test@test123.com	Test	Test12	☐	N/A
TestBrit	Test	Brit	☐	N/A
TestEncy	Test	Ency	☐	N/A
Tester	Test	Test	☐	N/A

1 2 3 4 5 6 7 8

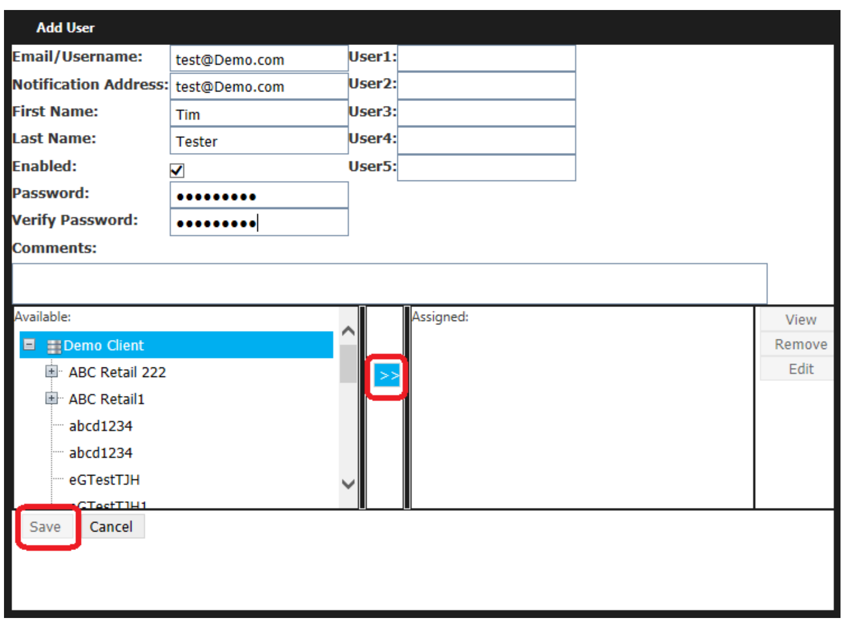
If a new user is to be created, select the ***Add User*** option.

Enter the new user information.



The red highlighted dialogue prompts will disappear from the screen as confirmation the information was entered correctly.

The User1 through User5 options can be used to add filters at the user level. This feature is not currently enabled.

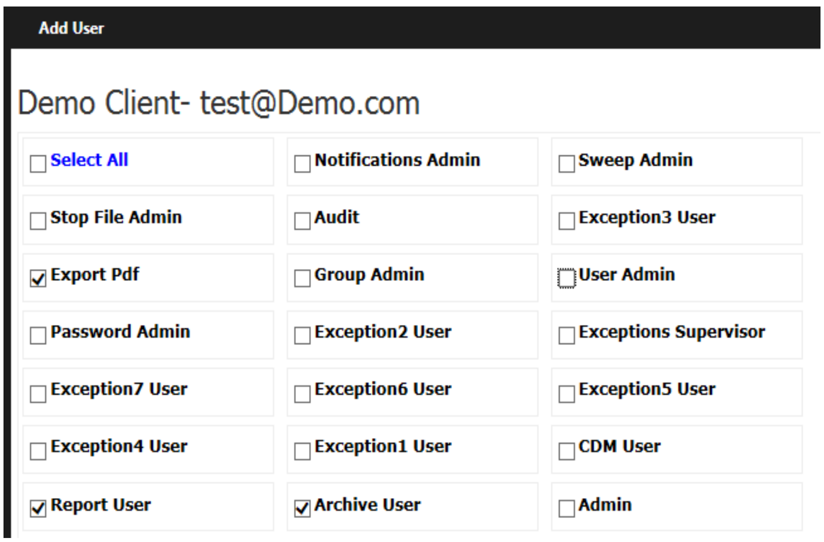


Once the selection has been made for the level of access in the *Available* box, move it to the *Assigned* box by clicking on the double arrow (which will enable the ***Save*** button). Click on ***Save*** to complete this screen and display the Roles page.

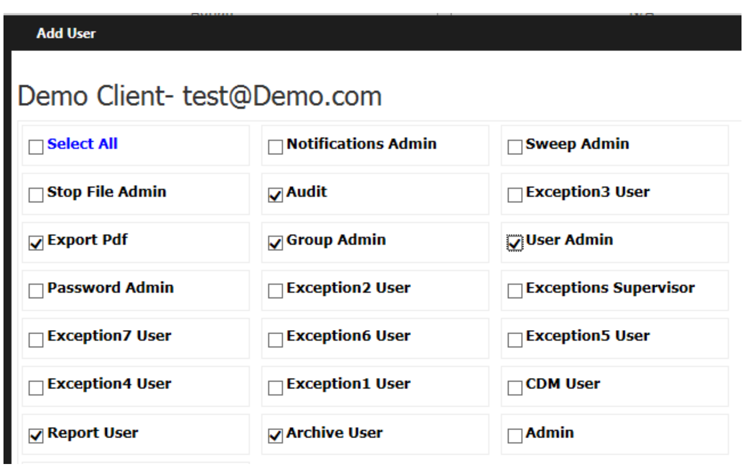
Assign Roles

After a user is created, at least one role must be selected for each user.

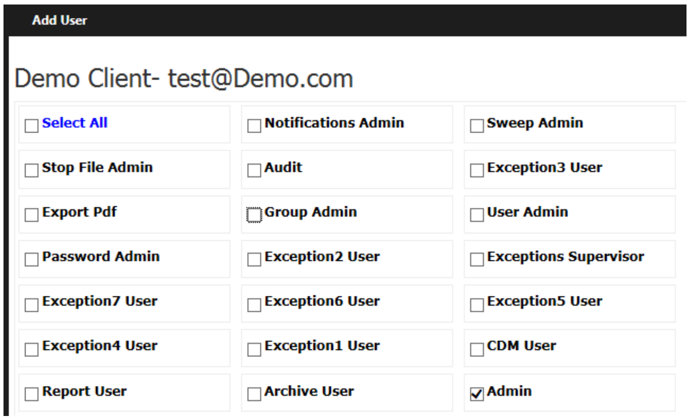
This is an example of a typical User Role assignment:



This is an example of a typical Administrator Role assignment:



This is an example of a “super” Administrator Role assignment:



Roles that can be assigned

Admin – this is a “super” admin role. This user will have the combination of roles for all admin functions.

Archive User – the user is able to access all Archive search options via the LTA function.

Audit – the user is able to access all Audit search options via the LTA function.

Export PDF – the user would have permission to download any archived data via PDF document.

Group Admin – a user can create, enable or disable groups only. The Group Admin can establish and monitor various group options within the application, including group reports, maintenance and broadcast messages.

Password Admin – granting this entitlement would allow the user to become an Administrative-level user, capable of creating users, resetting passwords, etc. This role gives a user access to other Admin features.

PPW Supervisor – reserved for Administrators using the PPW module. User has Edit capabilities.

Report User – allows the user to access all reports within the system.

User Admin – User Admin can only set up users, assign roles and modify passwords (unlike the Password Admin, above).

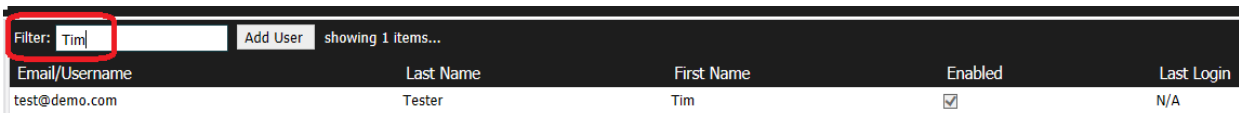
NOTE: Users cannot modify their own entitlements.

Modify/Delete and Enable/Disable User

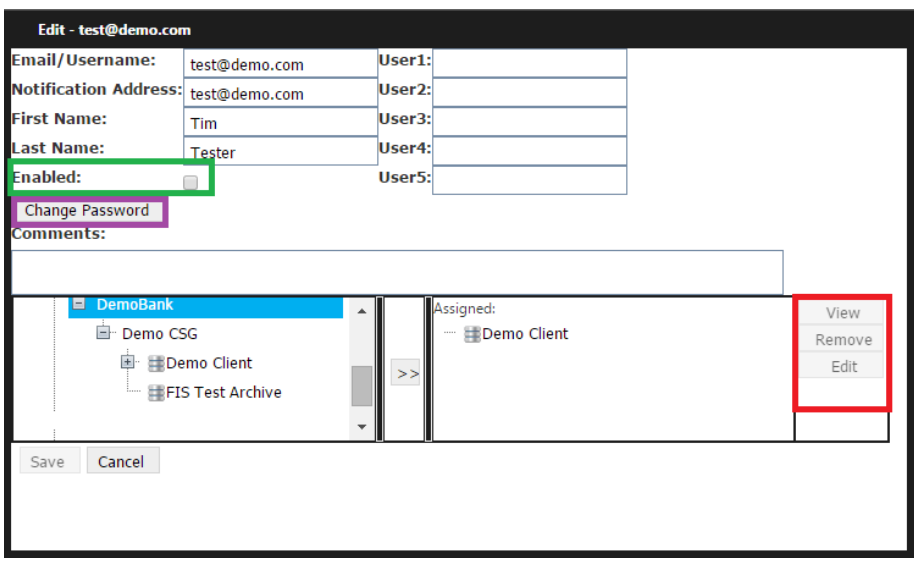
To modify or delete an existing user, access the user list via ***User Management***. When ***User Management*** is opened, the list of any existing users is displayed. Each user's name is displayed as a hyperlink. Clicking on any user listed will open that user's profile and display all entitlements granted to that user.

If there are more users than can be displayed on the page, a user can be located by a search feature, called ***Filter***, displayed at the top left corner or the user display list.

Enter the last name or first name of the user needed in the ***Filter*** box, and that user's information will be displayed.



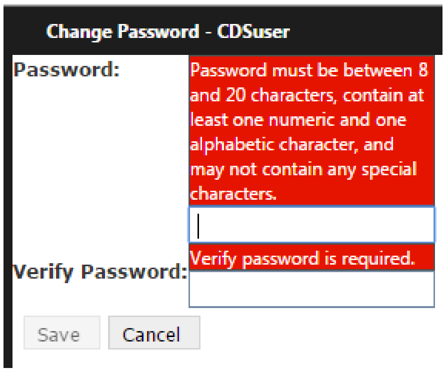
Once a user is located, the existing entitlements are displayed. The user can be modified or deleted as needed (refer to the red box below). The Administrator may select ***View*** to see the entitlements granted to this user, or select ***Remove*** to remove a role, or ***Edit*** to make any modifications.



Users can be disabled or enabled from LBXCentral by making a selection in the ***Enabled*** box (refer to green box). To disable a user, de-select the check mark.

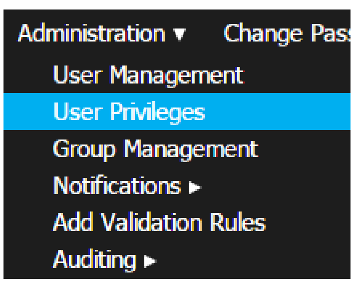
Reset User Password

A user's password can be changed by clicking on the ***Change Password*** button (see purple box above). Only an Administrator-level user with password privileges will be able to reset user passwords in LBXCentral. Once the user information is displayed, enter the password information needed. Keep in mind the passwords must be between 8 and 50 characters, contain at least one upper-case letter, one lower-case letter and one number. It cannot contain repeat characters or the word 'password'.

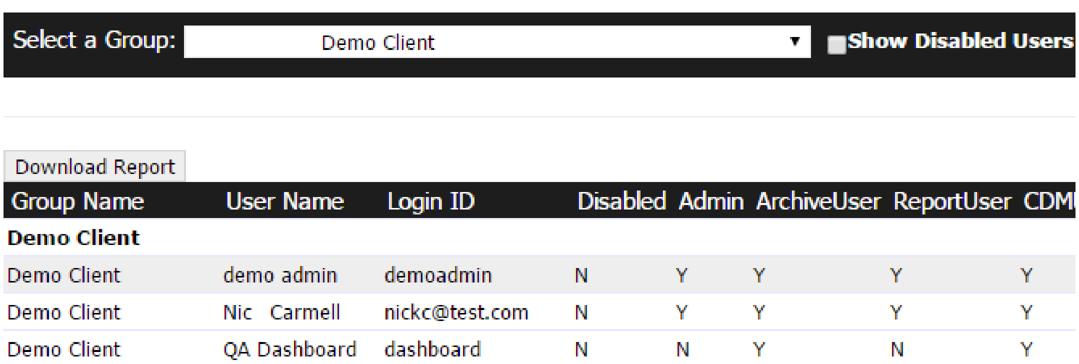


From this display, input the new password information. If the password information is accepted the red highlighted prompts will disappear and the ***Save*** button will become enabled.

User Privileges



User Privileges offers a report of all users and the roles granted to each person. Here is an abbreviated sample of the report (it is too wide for all columns to fit on this page).

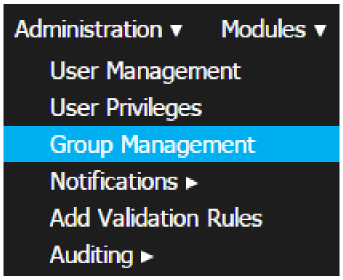


Group Name	User Name	Login ID	Disabled	Admin	ArchiveUser	ReportUser	CDM
Demo Client							
Demo Client	demo admin	demoadmin	N	Y	Y	Y	Y
Demo Client	Nic Carmell	nickc@test.com	N	Y	Y	Y	Y
Demo Client	QA Dashboard	dashboard	N	N	Y	N	Y

Advanced Administration Functions

NOT REQUIRED FOR BASIC ADMINISTRATORS AND USER RIGHTS

Group Management



The **Group Management** menu option allows the Administrator to view groups, add groups, disable groups, restrict a group's access and determine the amount of security associated with the group.

Listed here is an overview of the various Group modules and some examples of how they are used.

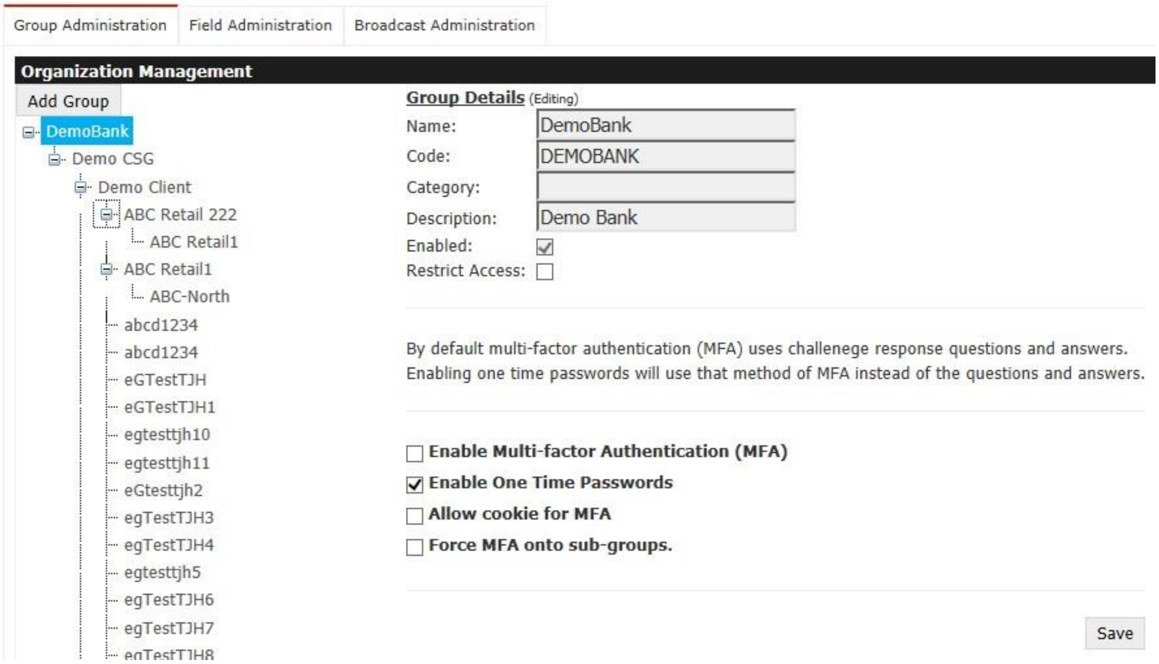
Group Administration – allows the Administrator to establish specialized groups of users within the company.

Field Administration – allows the Administrator to monitor the report fields created in LBXCentral; the names of the fields and the order in which they appear.

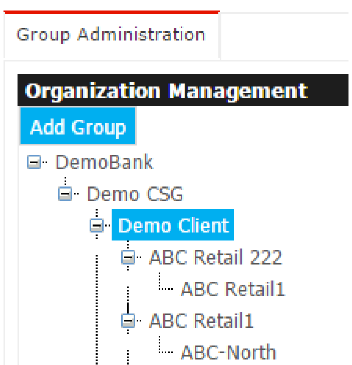
Broadcast Administration – allows the Administrator to create and manage messages for various groups of users.

Group Administration

In the Group Administration tab, the Organization Management screen has an organization tree on the left side of the screen. The group being worked on will be highlighted in green lettering. If another group listed on the screen is chosen, then that name will turn green and the page will refresh. Any actions taken will be applied to the highlighted group and any groups under it. Actions will only go down to sub-groups, not up the list to parent groups.

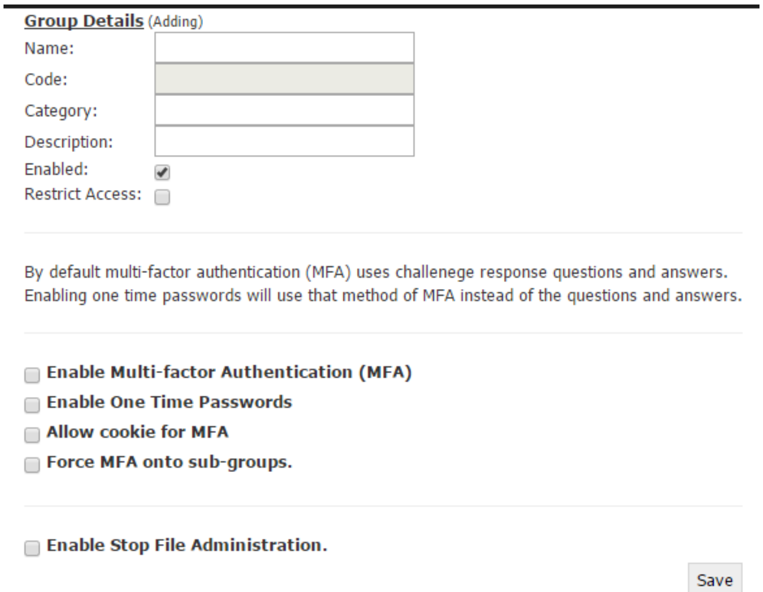


The Administrator has the ability to add sub-groups. Click on the level that the new group will fall under (Demo Client, in this example) and select ***Add Group.***

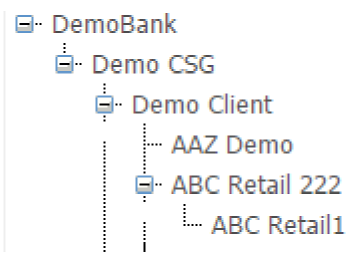


The **Group Details** area will be added to the screen. Add the new sub-group details and click ***Save***. Always have the ***Enabled*** check box checked for new groups – otherwise users would have no access to the group at all.

BankFinancial



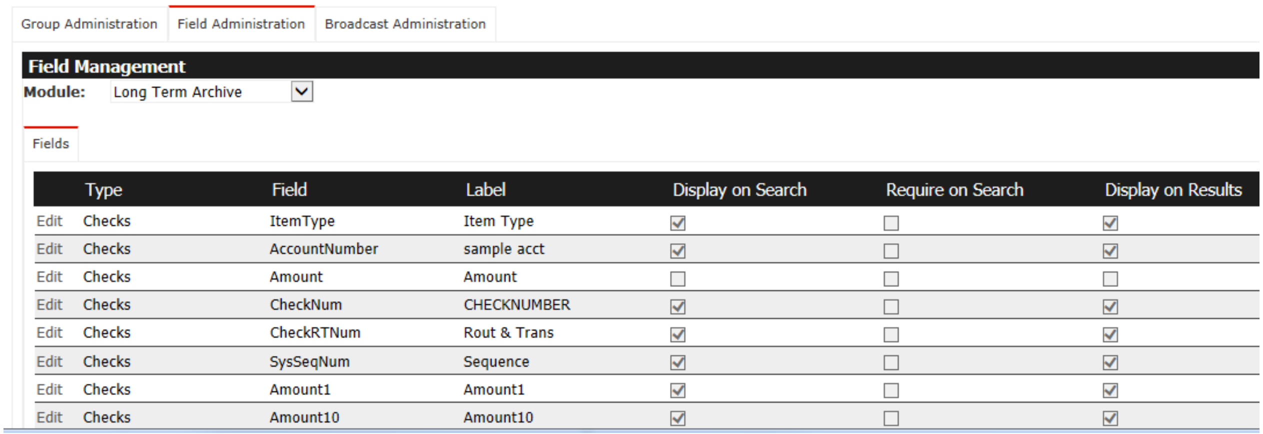
The result is a new sub-group of the DemoBank group has been established (AAZ Demo, in this example):



Field Administration

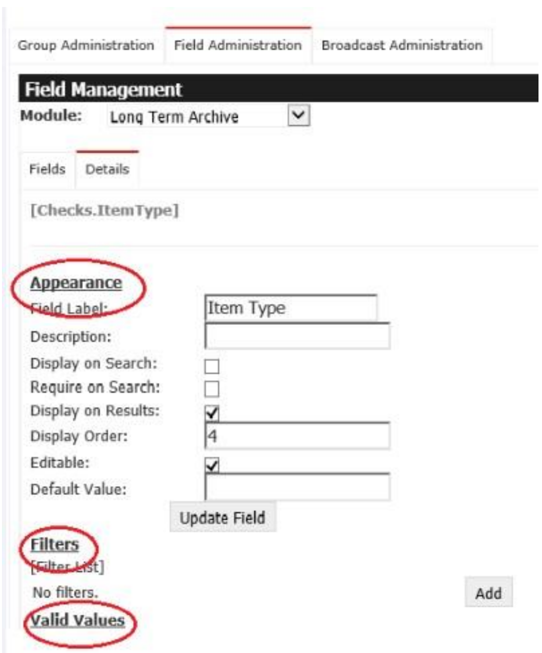
The ***Field Administration*** tab is used to add filtering to various modules. When ***Field Administration*** is selected, all the fields and definition labels are listed, along with all the options created for those fields.

First select the Module in the pull-down (**Long Term Archive, PPW or Reports)**.
The Administrator can change the verbiage on a field label or rearrange the way they are displayed, etc.



	Type	Field	Label	Display on Search	Require on Search	Display on Results
Edit	Checks	ItemType	Item Type	☑	☐	☑
Edit	Checks	AccountNumber	sample acct	☑	☐	☑
Edit	Checks	Amount	Amount	☐	☐	☐
Edit	Checks	CheckNum	CHECKNUMBER	☑	☐	☑
Edit	Checks	CheckRTNum	Rout & Trans	☑	☐	☑
Edit	Checks	SysSeqNum	Sequence	☑	☐	☑
Edit	Checks	Amount1	Amount1	☑	☐	☑
Edit	Checks	Amount10	Amount10	☑	☐	☑

Any of the fields above can be changed by selecting the ***Edit*** hyperlink next to the Field. The display page shown below will appear.



This screen has three sections, which are described below.

Appearance

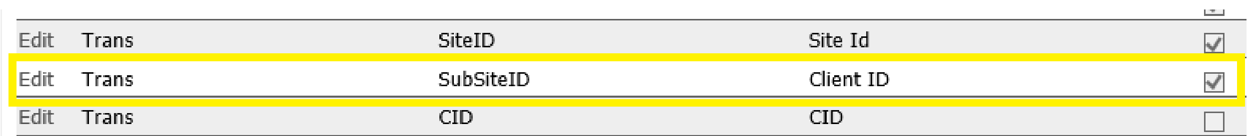
The Field Label can be updated by typing in a new name in the Field label box. A field description may be added (optional). There are three checkboxes available:

1. ***Display on Search*** – the field will be available for searching on;
2. ***Require on Search*** - the field will be required to be entered in order to perform any searches;
3. ***Display on Results*** – the file will be displayed in the search results.

The display order for the field can be specified. The field can be edited only if the box is selected. Alternatively, a default value may be specified.

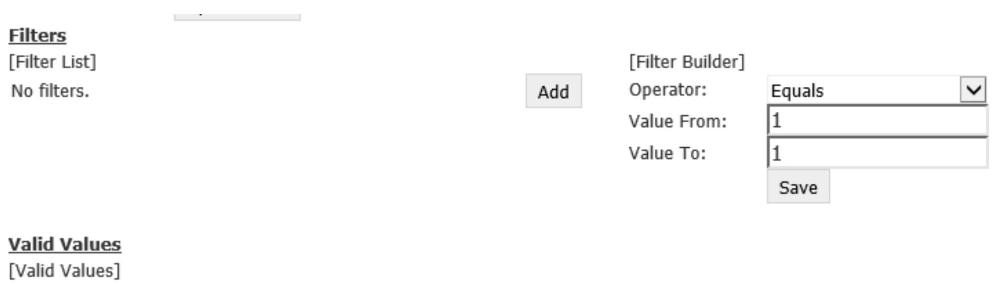
Clicking the ***Update Field*** button at the bottom of the Appearance area will update the information in this area.

Filters



The highlighted line in the Field Administration tab will have bold text which indicates that a filter is place.

The Administrator can limit the display of items by adding a filter to the field. To add a filter, click the ***Add*** button. This will open additional information to the right side of the screen for use in creating the filter, called the Filter Builder.   Select an operator and the values for the filter and click ***Save***.



The result of applying the filter above is that only data for Client ID 1 is displayed below in the search results screen.

Search | Results

	Tran#	ClientID	Batch#	SuspenseType	Ref ID	Status	Load Date	Process Date	Batch Mode
	86872	1	200	Property ID	86872	Rejected	20140603	20140603	111
	86874	1	200	Property ID	86874	Rejected	20140603	20140603	111
	86876	1	200	Property ID	86876	Rejected	20140603	20140603	111
	86877	1	200	Property ID	86877	Rejected	20140603	20140603	111
	86878	1	200	Property ID	86878	Rejected	20140603	20140603	111
	86879	1	200	Property ID	86879	Rejected	20140603	20140603	111
	86880	1	200	Property ID	86880	Accepted	20140603	20140603	111
	86881	1	200	Property ID	86881	Rejected	20140603	20140603	111
	86882	1	200	Property ID	86882	Rejected	20140603	20140603	111
	86886	1	200	Property ID	86886	Rejected	20140603	20140603	111

1 2 3 4 5 Next Last

Valid Values

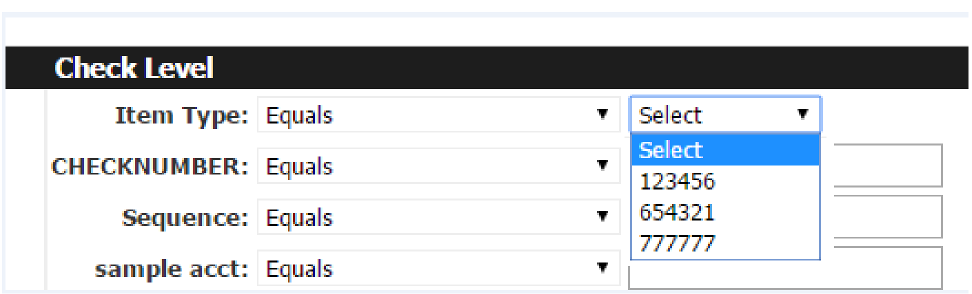
By setting up valid values, the Administrator can change an edit box to a selectable field with a dropdown.

Valid Values

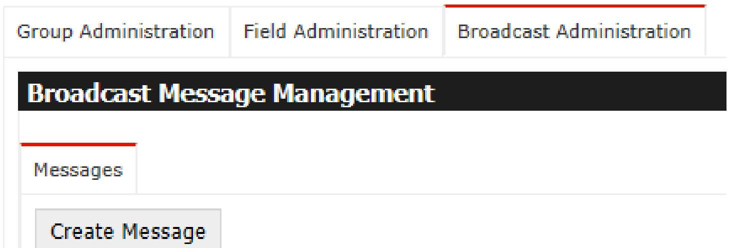
[Valid Values]

Value	Display Value
Delete 123456	123456
Delete 654321	654321
Delete 777777	777777
Insert	

Below is the result of applying the above valid values to the Item Type field.



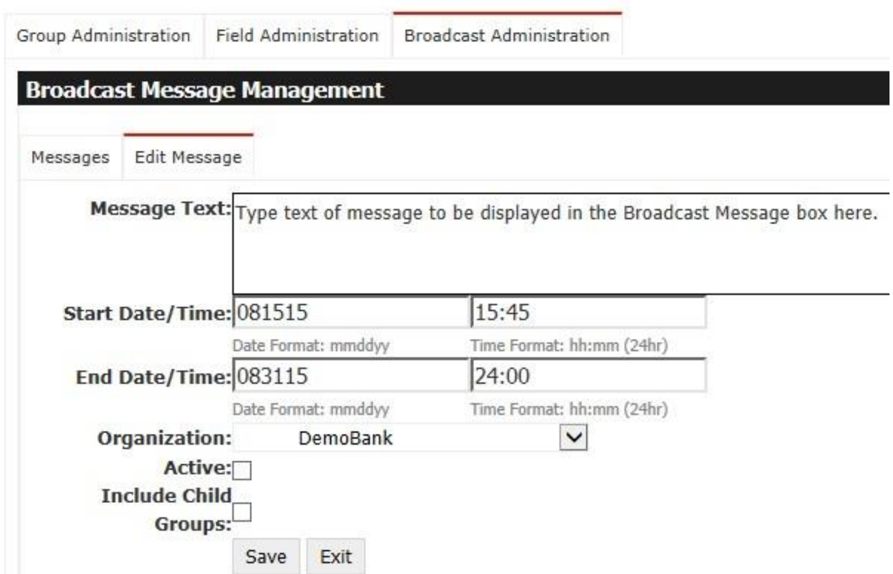
Broadcast Administration



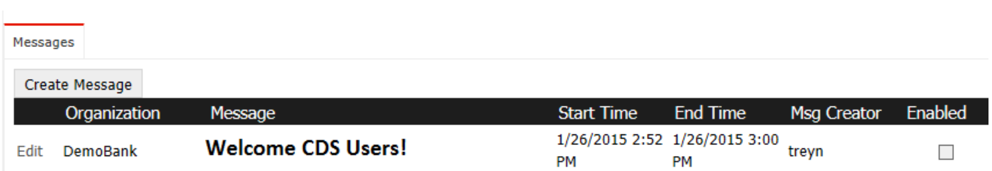
The Broadcast Administration tab allows Administrators to create and control messages that will be displayed to users on the home page. It is used to convey information about what is going on with the system.

Messages are created at a group level and can be displayed to sub-groups.

To begin, click on the ***Create Message*** button. Type in the message, and select the start/stop date and time and the Organizations who should see the message.



When the message construction is complete, click ***Save***. The message will be displayed on the home page as scheduled.
Previous messages can be reactivated and displayed after expiring by editing the dates and times.

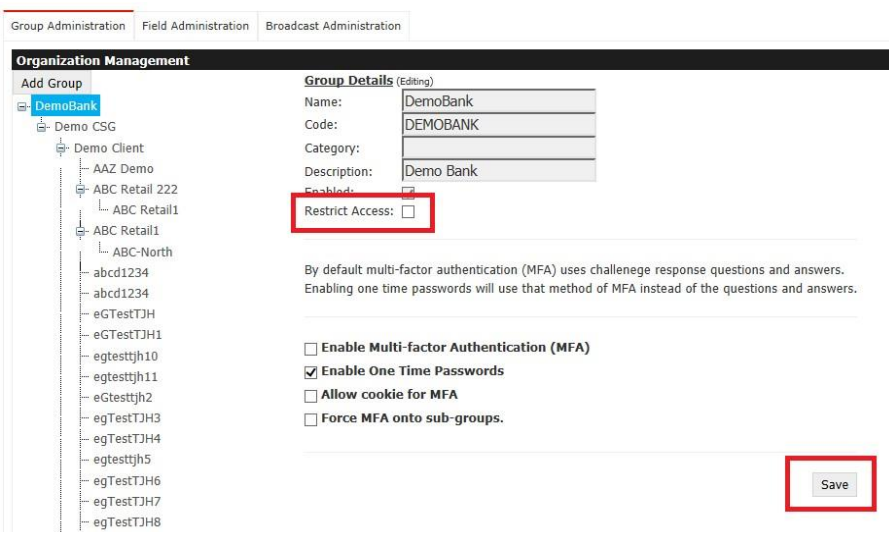


Group Access Administration

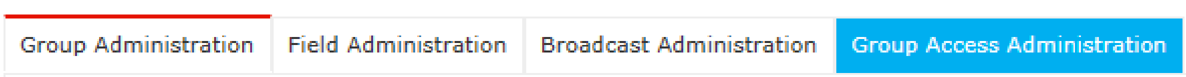
Many companies offer their associates the opportunity to work from home one or more days a week. **Group Access Administration** allows remote access by adding trusted originating IP addresses into the system.

LBXCentral is a secured application. In order for a user to work from home, their IP VPN information must be added to the validated user list to allow remote access and yet still remain secure.

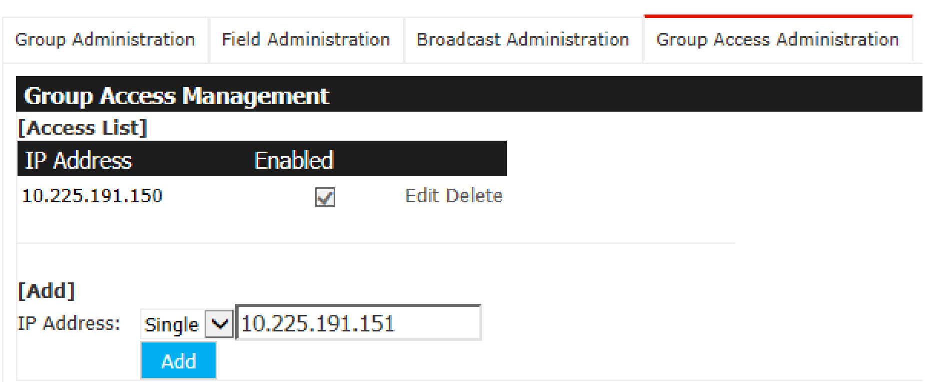
To allow a user remote access, the IP information must be entered into the system by the Administrator. To enable the **Group Access Administration** feature, the ***Restrict Access*** box must be checked from the **Group Administration** screen.



After selecting ***Save*** above, the **Group Access Administration** tab will appear.

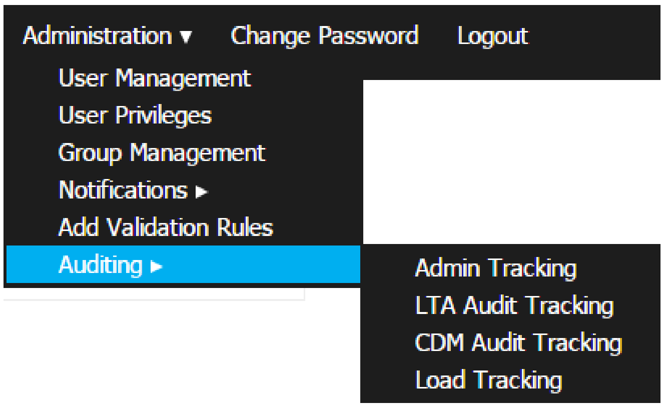


A single IP or a range of IP addresses can be added by selecting either ***Single*** or ***Range*** from the pull down.



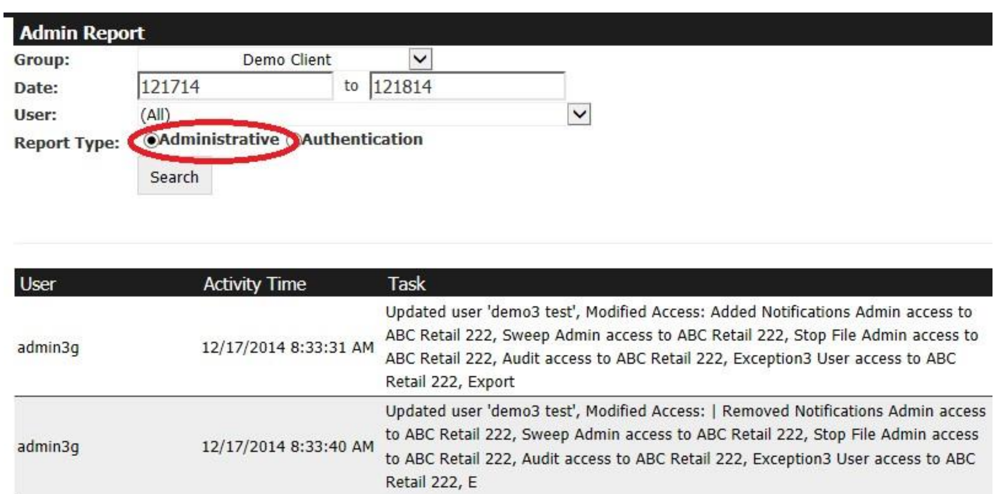
Auditing

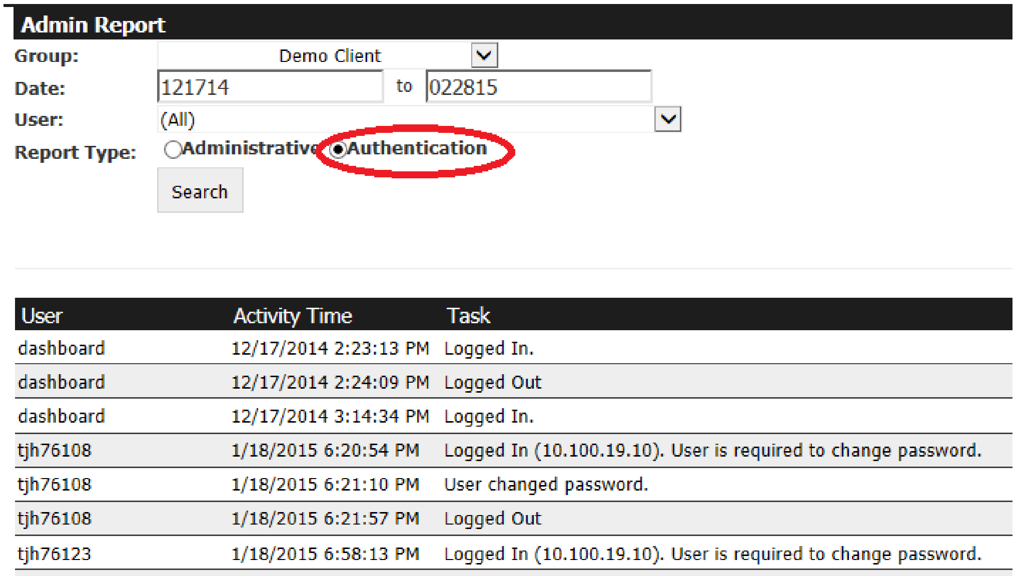
The Auditing menu option allows the Administrator to view all changes that were made to any transaction.



The Auditing menu contains four report options: Admin Tracking, LTA Audit Tracking and Load Tracking. Each report is described below.

Admin Tracking – allows the Administrator to see the activities that administrators have done, as well as to view login times, logout times, password changes, etc. There are two report types available: *Administrative* and *Authentication*.





Admin Report

Group: Demo Client

Date: 121714 to 022815

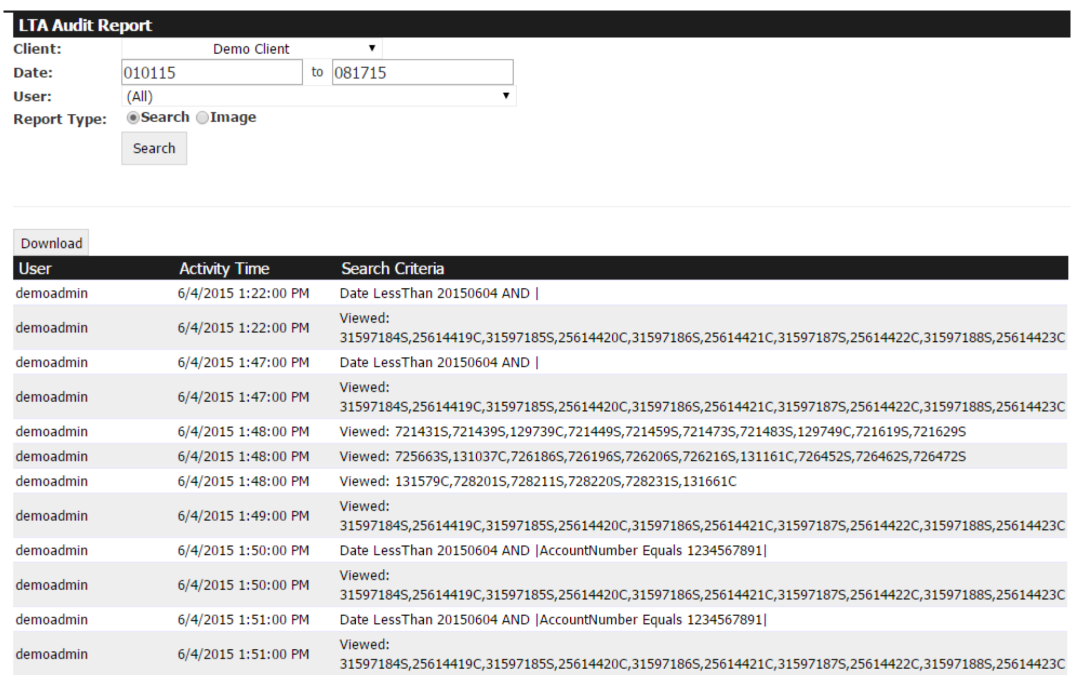
User: (All)

Report Type: ◯Administrative ◉Authentication

Search

User	Activity Time	Task
dashboard	12/17/2014 2:23:13 PM	Logged In.
dashboard	12/17/2014 2:24:09 PM	Logged Out
dashboard	12/17/2014 3:14:34 PM	Logged In.
tjh76108	1/18/2015 6:20:54 PM	Logged In (10.100.19.10). User is required to change password.
tjh76108	1/18/2015 6:21:10 PM	User changed password.
tjh76108	1/18/2015 6:21:57 PM	Logged Out
tjh76123	1/18/2015 6:58:13 PM	Logged In (10.100.19.10). User is required to change password.

LTA Audit Tracking – allows the Administrator to view anything an Archive user has done; including searches and images they have viewed. This report provides the option to download the results to a CSV file that can be saved to a local drive.



LTA Audit Report

Client: Demo Client

Date: 010115 to 081715

User: (All)

Report Type: ◉Search ◯Image

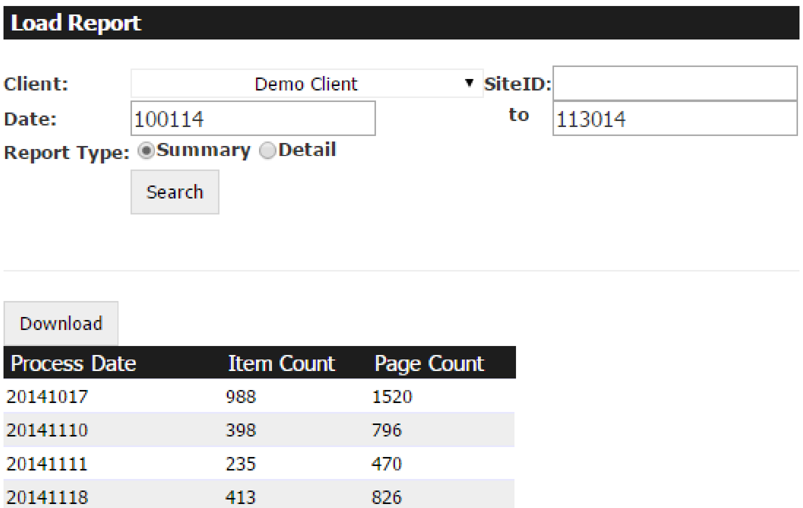
Search

Download

<table>
<tr><th>User</th><th>Activity Time</th><th>Search Criteria</th></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:22:00 PM</td><td>Date LessThan 20150604 AND |</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:22:00 PM</td><td>Viewed: 31597184S,25614419C,31597185S,25614420C,31597186S,25614421C,31597187S,25614422C,31597188S,25614423C</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:47:00 PM</td><td>Date LessThan 20150604 AND |</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:47:00 PM</td><td>Viewed: 31597184S,25614419C,31597185S,25614420C,31597186S,25614421C,31597187S,25614422C,31597188S,25614423C</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:48:00 PM</td><td>Viewed: 721431S,721439S,129739C,721449S,721459S,721473S,721483S,129749C,721619S,721629S</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:48:00 PM</td><td>Viewed: 725663S,131037C,726186S,726196S,726206S,726216S,131161C,726452S,726462S,726472S</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:48:00 PM</td><td>Viewed: 131579C,728201S,728211S,728220S,728231S,131661C</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:49:00 PM</td><td>Viewed: 31597184S,25614419C,31597185S,25614420C,31597186S,25614421C,31597187S,25614422C,31597188S,25614423C</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:50:00 PM</td><td>Date LessThan 20150604 AND |AccountNumber Equals 1234567891|</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:50:00 PM</td><td>Viewed: 31597184S,25614419C,31597185S,25614420C,31597186S,25614421C,31597187S,25614422C,31597188S,25614423C</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:51:00 PM</td><td>Date LessThan 20150604 AND |AccountNumber Equals 1234567891|</td></tr>
<tr><td>demoadmin</td><td>6/4/2015 1:51:00 PM</td><td>Viewed: 31597184S,25614419C,31597185S,25614420C,31597186S,25614421C,31597187S,25614422C,31597188S,25614423C</td></tr>
</table>

Load Tracking – allows the Administrator to view details of files that have been loaded, including load dates, process dates, item counts and page counts. An error code indicates that a file may have had an import issue. A summary view and detailed view are available, and search results can be downloaded to a CSV file and saved to a local drive.

Summary View:



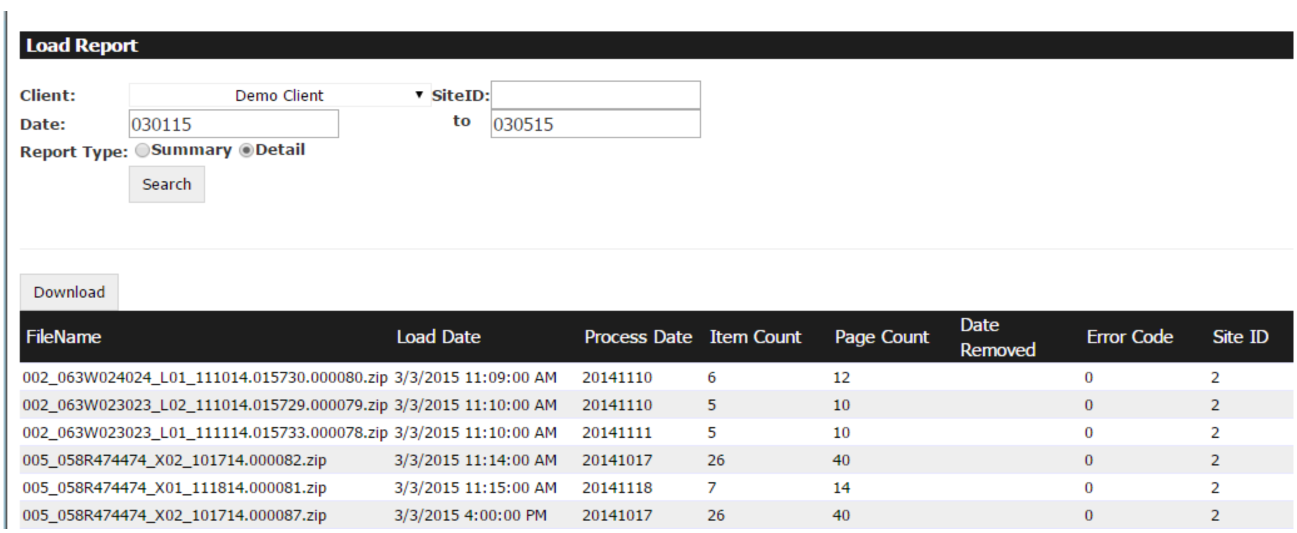
Load Report

Client: Demo Client SiteID:
Date: 100114 to 113014
Report Type: (•) Summary ( ) Detail
Search

Download

Process Date	Item Count	Page Count
20141017	988	1520
20141110	398	796
20141111	235	470
20141118	413	826

Detail View:



Load Report

Client: Demo Client SiteID:
Date: 030115 to 030515
Report Type: ( ) Summary (•) Detail
Search

Download

FileName	Load Date	Process Date	Item Count	Page Count	Date Removed	Error Code	Site ID
002_063W024024_L01_111014.015730.000080.zip	3/3/2015 11:09:00 AM	20141110	6	12		0	2
002_063W023023_L02_111014.015729.000079.zip	3/3/2015 11:10:00 AM	20141110	5	10		0	2
002_063W023023_L01_111114.015733.000078.zip	3/3/2015 11:10:00 AM	20141111	5	10		0	2
005_058R474474_X02_101714.000082.zip	3/3/2015 11:14:00 AM	20141017	26	40		0	2
005_058R474474_X01_111814.000081.zip	3/3/2015 11:15:00 AM	20141118	7	14		0	2
005_058R474474_X02_101714.000087.zip	3/3/2015 4:00:00 PM	20141017	26	40		0	2

Notification's Administrator Guide

Version 7.0

Confidentiality Statement

1 Introduction

The Notification module is designed to be an even viewer management tool. LBXCentral users can receive email notification of events happening in the system that impact their work. Users may be notified when file imports are complete; when data extractions are complete and when new broadcast messages have been generated. The types of notifications users receive are managed by subscriptions and can be highly customized based on the needs of a user.

Notifications Management is designed to allow the Administrator user to create subscriptions to capture events and assign these subscriptions to users throughout the system. Subscriptions are created utilizing an easy to use interface where the type of event, the start date and end dates are set up. Once the subscription is created, the administrator then creates a delivery

2 Administration: Notifications

The **Notifications Management** sub-menu of the Administration menu allows you to create new subscriptions, edit or delete existing subscriptions, create delivery methods or edit existing delivery methods.

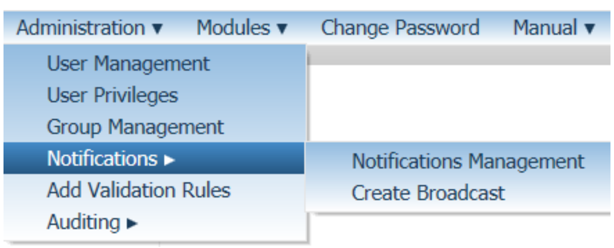


Figure 1: Notifications Management Menu

Choose the **Notifications Management** sub-menu option to open the Subscriptions screen.

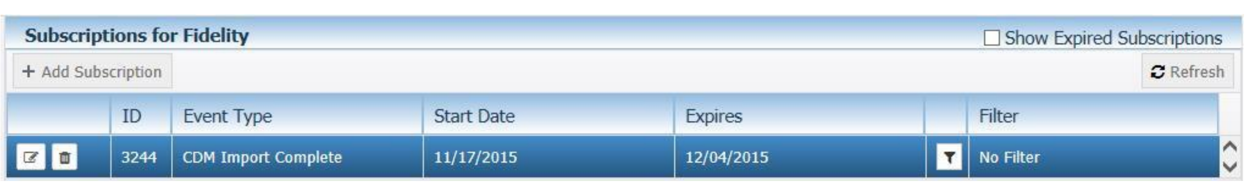


Figure 2: Subscriptions Screen

2.1 Add New Subscription

Choose a group from the drop-down list in the top right corner of the screen.

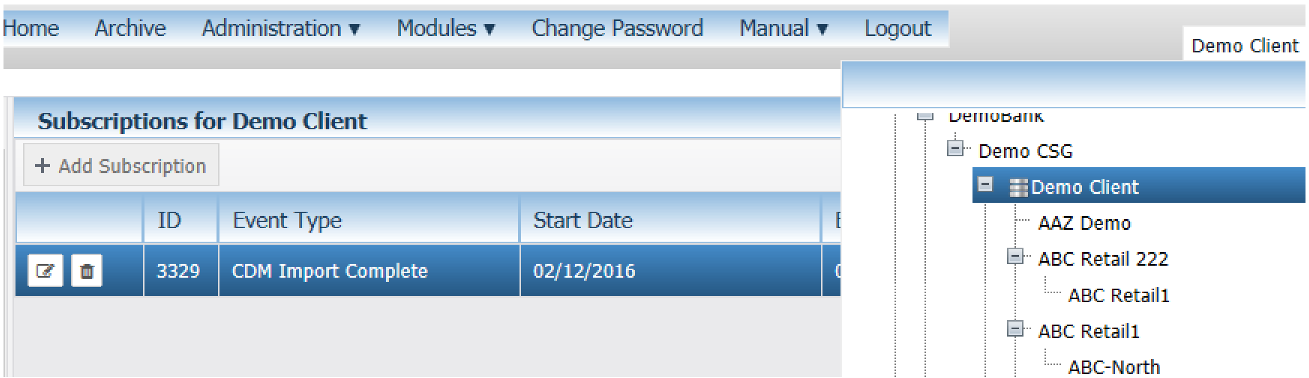


Figure 3: Entity Drop-down List

Click + Add Subscription to add a new subscription for the entity chosen. This will open a pop-up box in which to enter the Event Type, Start Date and Expiration date.

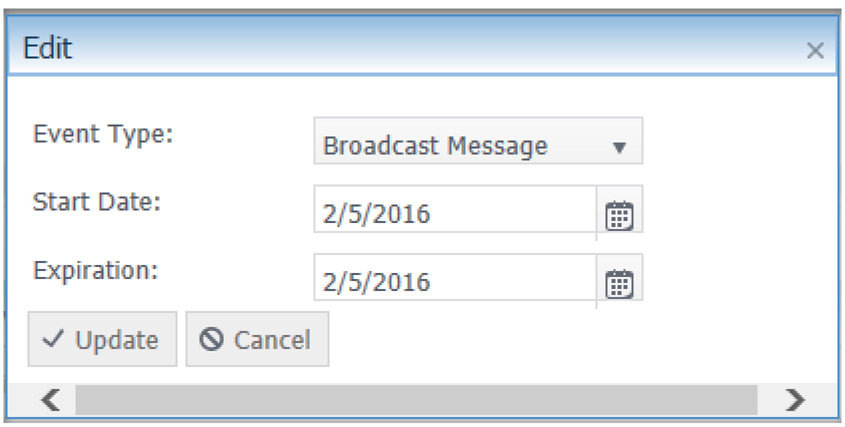


Figure 4: Subscription Creation Pop-up Box

Choose the Event Type from the drop-down list.

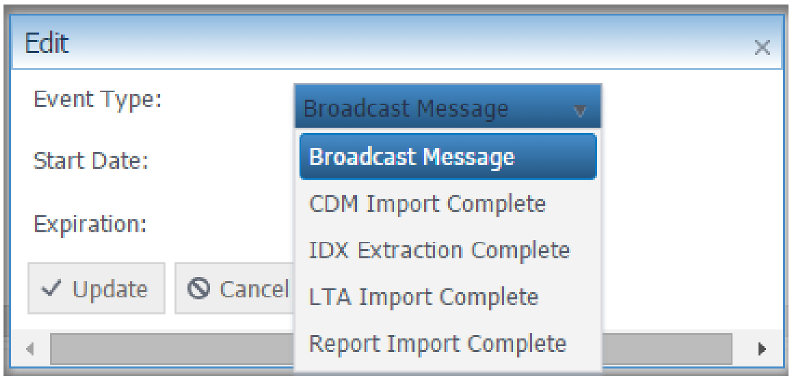


Figure 5: Event Type Drop-down List

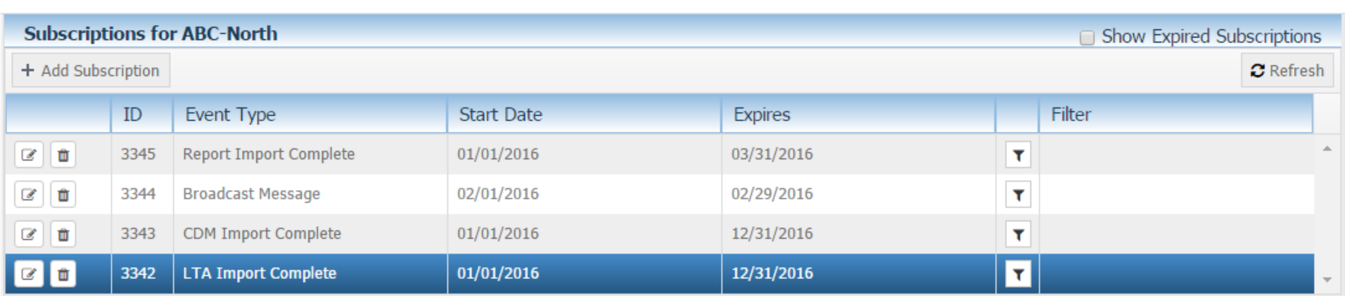
Options available in the Drop-down list include:

1. **Broadcast Message**
   This creates an email that can be sent to any group of users.
2. **CDM Import Complete**
   Will generate a notification when CDM files have imported into the system.
3. **IDX Extraction Complete Event**
   This is an optional administration module for data extractions. Notification will be generated when the extract is complete.
4. **LTA Import Complete**
   Will generate a notification when LTA files have imported into the system.
5. **Report Import Complete**
   Will generate a notification when report files have imported into the system.

Enter the date or choose the Start Date and Expiration Date from the calendar pop-up.

Click ✓ Update to add the subscription and the item will then be added to the list of available subscriptions.

Click ⦸ Cancel to cancel.


Subscriptions for ABC-North — Show Expired Subscriptions

+ Add Subscription — Refresh

	ID	Event Type	Start Date	Expires		Filter
	3345	Report Import Complete	01/01/2016	03/31/2016		
	3344	Broadcast Message	02/01/2016	02/29/2016		
	3343	CDM Import Complete	01/01/2016	12/31/2016		
	3342	LTA Import Complete	01/01/2016	12/31/2016		

Figure 6: Subscription List

From the Subscription List, a subscription can be edited, deleted or filters can be added.

2.2 Edit a Current Subscription

To edit a subscription in the list, click beside the item you wish to edit. An edit box will open allowing you to make changes to the start date or the Expiration date.

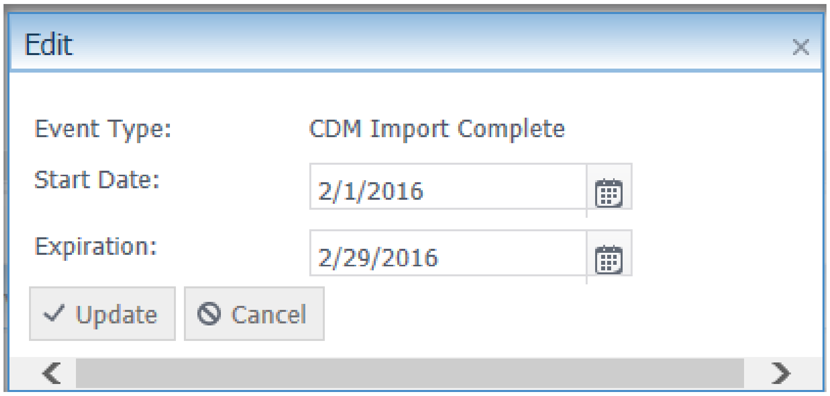


Figure 7: Edit Pop-up

Click Update to update the subscription with changes or Cancel to cancel.

2.3 Delete a Current Subscription

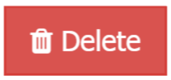
To delete a subscription from the list, click beside the item you wish to delete.

	ID	Event Type	Start Date	Expires		Filter
	3323	Report Import Complete	01/01/2016	03/31/2016		
	3322	LTA Import Complete	01/01/2016	12/31/2016		
	3321	Broadcast Message	02/01/2016	02/29/2016		
	3320	CDM Import Complete	01/01/2016	12/31/2016		

Figure 8: Delete Subscription

A pop-up box will open.

Figure 9: Confirm Delete Pop-up

Click 

to Delete the item or 

to Cancel the deletion.

2.4 Add Filters to Subscription

Filters are optional and can be used to create more detailed notifications. Once a subscription has been created, filters can be added if needed. Click  to the right of the Subscription to open the Filter Builder pop-up box. The Filter Builder pop-up box is populated with various items based upon the Event Type chosen when the subscription was created.

1. Filter choices for the event type Broadcast Message
   a. Category
   b. Message
   c. Error Message
   d. Item Count
   e. Time Elapsed
   f. Status
2. Filter choices for the event types CDM Import Complete, LTA Import Complete and Report Import Complete.
   a. Total Amount
   b. Exceptions Count

   c. High Dollar Amount
   d. File Size
   e. Image Count
   f. Source Type
   g. Error Message
   h. Item Count
   i. Time Elapsed
   j. Status

3. Filter choices for the event, IDX Extraction Complete Event (an optional Admin module).
   a. Error Message
   b. Item Count
   c. Time Elapsed
   d. Status

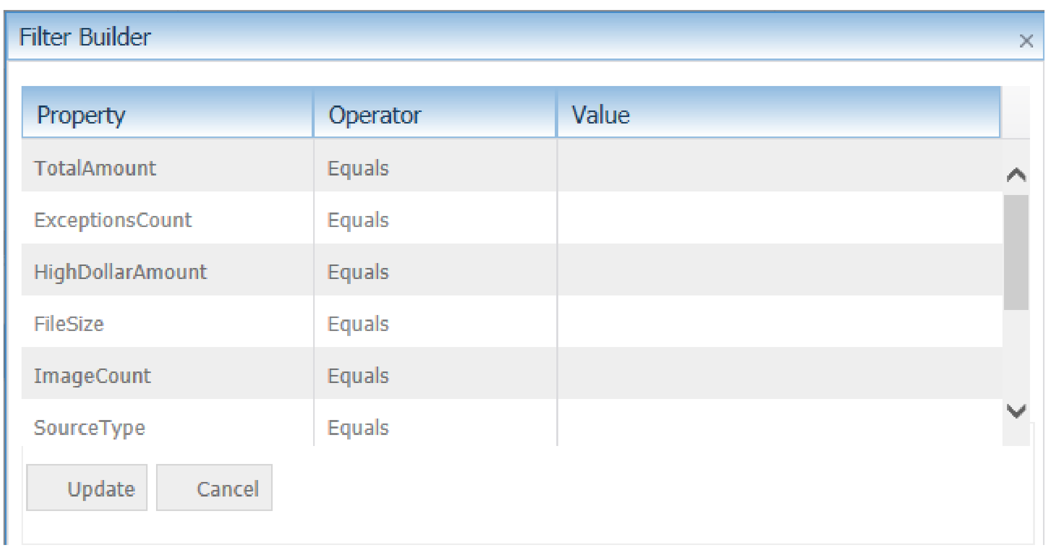


Figure 10: Filter Builder Pop-up

Click two times on the Operator (Equals) beside the Property you wish to edit to open the drop down list.

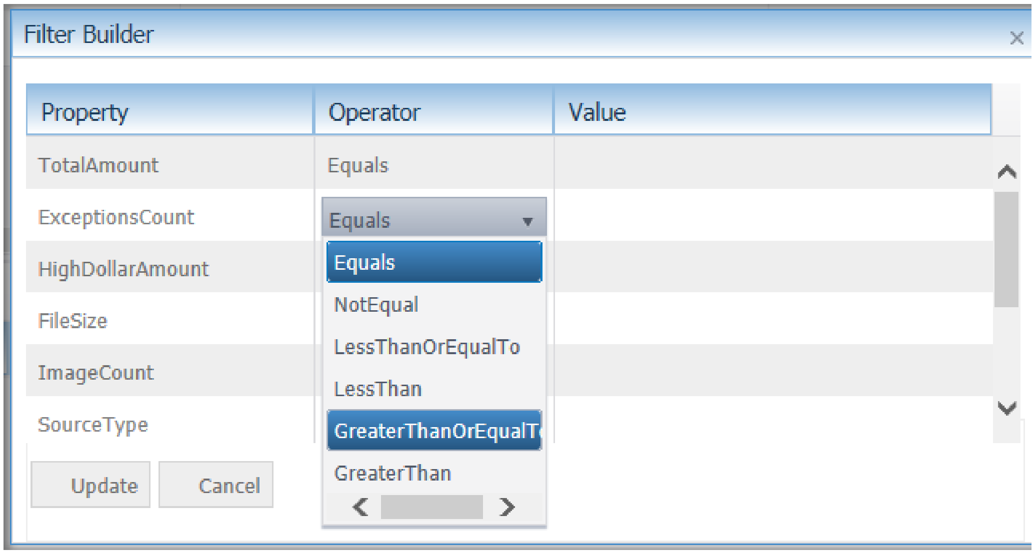


Figure 11: Operator Drop-down List

Choose the appropriate Operator from the list.

Click the space in the Value column next to the Property you wish to edit to open the edit box.

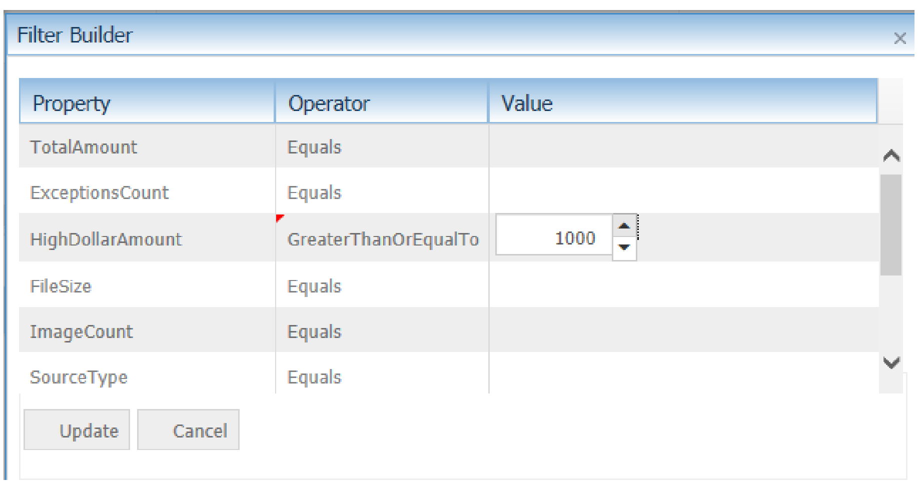
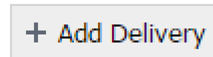


Figure 12: Operator Values

Enter the appropriate filter value(s) for the Property items and then click Update to add the Filters or Cancel to continue without making any changes. Items that have been changed are denoted with a red triangle in the left corner of the box.

2.5 Add Delivery to Subscription

Once the subscription has been created and filters have been created, the delivery method and frequency can be set up.

Click on the Subscription you wish to add delivery methods to and then click 

to open the Add Delivery Edit pop-up window.

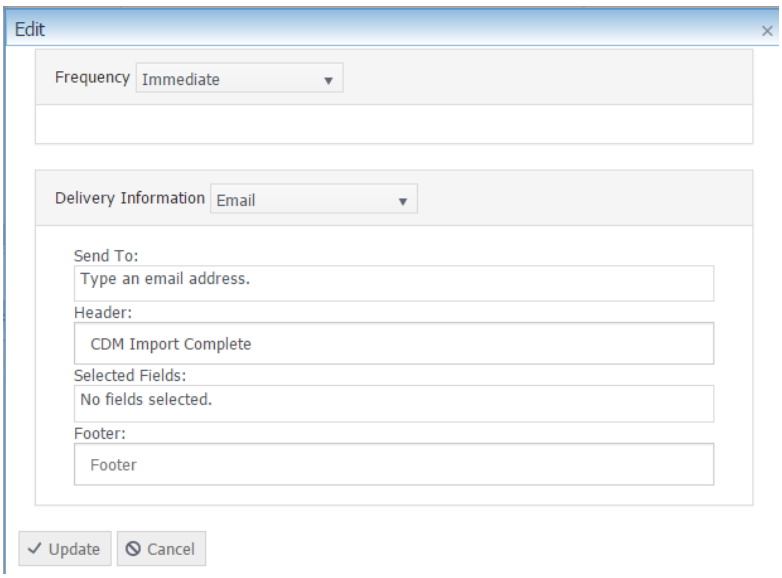


Figure 13: Edit Delivery Pop-up Window

1. Choose a **Frequency** from the Frequency drop-down list.
    a. Immediate: The email will be sent immediately upon update

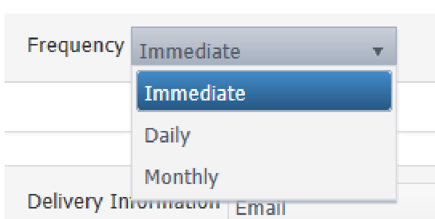


Figure 14: Frequency Drop-down List Immediate

b. Daily: Choose which days of the week to send the email

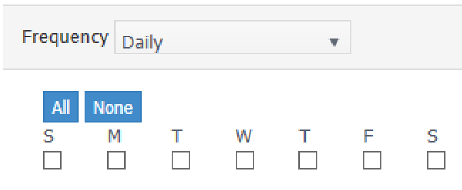


Figure 15: Frequency Drop-down List Daily

c. Monthly: Choose which month and days of the month to send the email

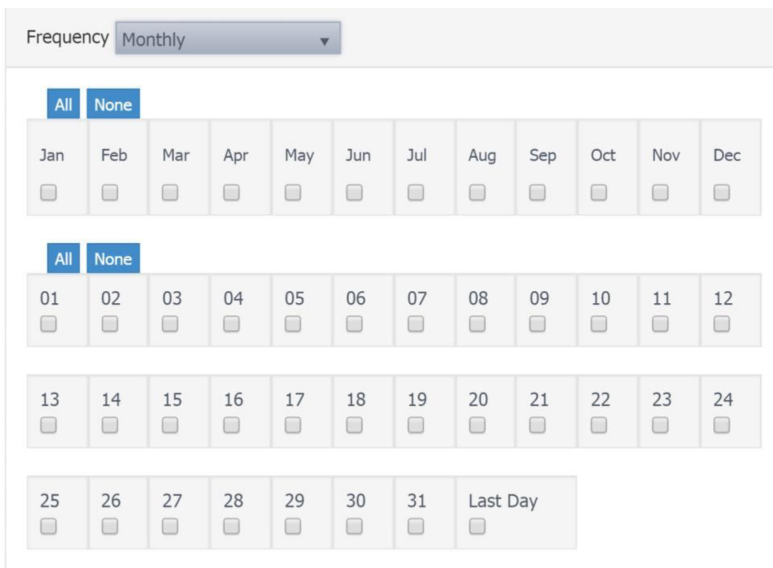


Figure 16: Frequency Drop-down List Monthly

2. **Delivery Information** defaults to Email.

   a. Enter an email address(es) in the **Send To** box

   b. Change the **Header** if needed. Default Header is Event Type.

   c. Choose field(s) to include from the **Selected Fields** drop-down list which opens when you click in the box. Multiple fields can be chosen by opening the drop-down list again and clicking on one of the remaining items.

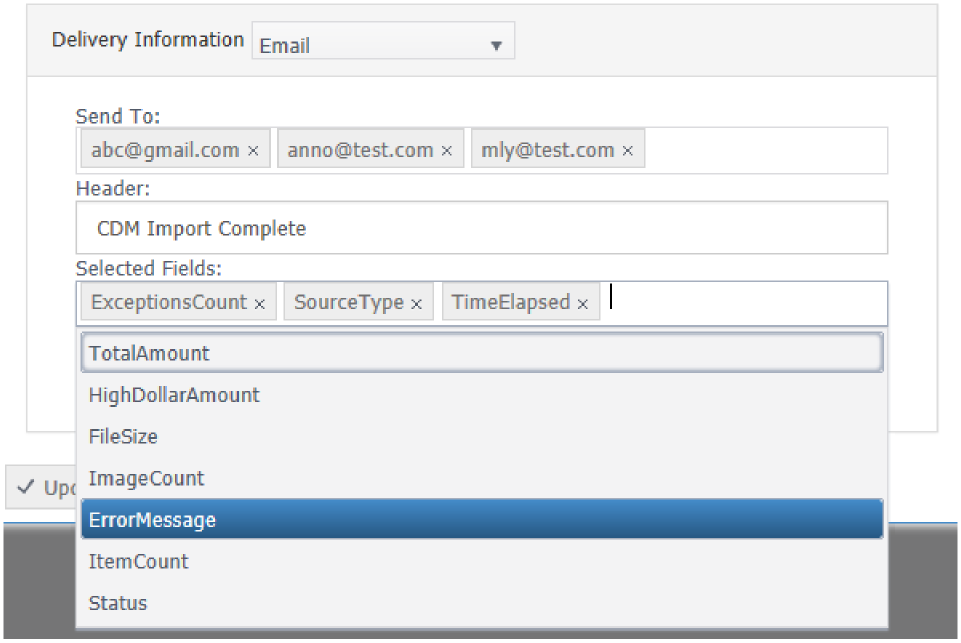


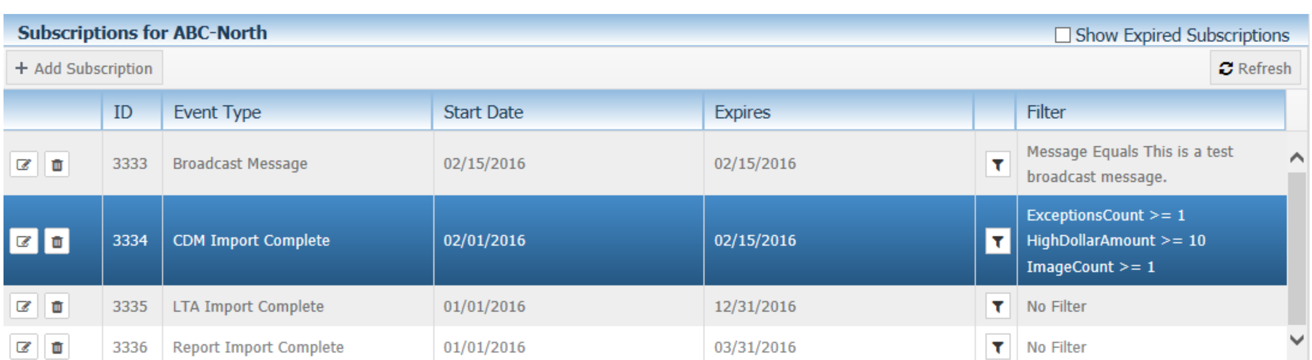
Figure 17: Selected Fields Drop-down List

d. Create a **Footer** (optional).

e. Click ✔ Update to add the Delivery Method or ⊘ Cancel to exit without making any changes.

2.6 Expired Subscriptions

Use the Show Expired Subscriptions check box at the top to filter the results for only expired subscription events.



	ID	Event Type	Start Date	Expires		Filter
	3333	Broadcast Message	02/15/2016	02/15/2016		Message Equals This is a test broadcast message.
	3334	CDM Import Complete	02/01/2016	02/15/2016		ExceptionsCount >= 1 HighDollarAmount >= 10 ImageCount >= 1
	3335	LTA Import Complete	01/01/2016	12/31/2016		No Filter
	3336	Report Import Complete	01/01/2016	03/31/2016		No Filter

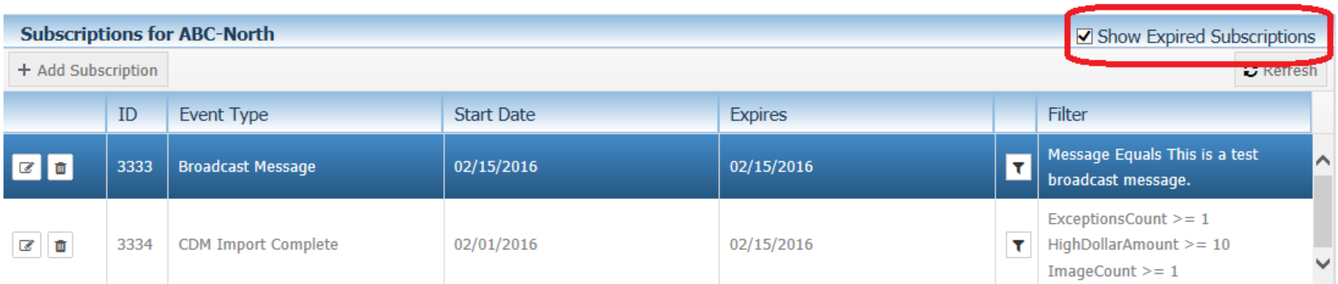


Figure 18: Show Only Expired Subscriptions

Notification Email Examples

From: donotreply@fislbxcentral.com [mailto:donotreply@fislbxcentral.com]
Sent: Tuesday, March 08, 2016 8:49 AM
To: test@gmail.com
Subject: LTA Import Complete

LTA Import Complete
TotalAmount: 0
ExceptionsCount: 0
HighDollarAmount: 0
ImageCount: 40
FileSize: 377813
SourceType: LTA
ErrorMessage:
ItemCount: 20
Status: 0
TimeElapsed: 2796
LBX Fairville Accounts 2264 Immediate

From: donotreply@fislbxcentral.com [mailto:donotreply@fislbxcentral.com]
Sent: Tuesday, March 08, 2016 8:49 AM
To: test@gmail.com
Subject: LTA Import Complete

LTA Import Complete
TotalAmount: 0
ExceptionsCount: 0
HighDollarAmount: 0
ImageCount: 40
FileSize: 377813
SourceType: LTA
ErrorMessage:
ItemCount: 20
Status: 0
TimeElapsed: 2796
LBX Fairville Accounts 2264 Immediate

From: donotreply@fislbxcentral.com [mailto:donotreply@fislbxcentral.com]
Sent: Tuesday, March 08, 2016 9:00 AM
To: test@gmail.com
Subject: CDM Import Complete

CDM Import Complete

ExceptionsCount	HighDollarAmount	FileSize	ImageCount	SourceType	TotalAmount	ErrorMessage
0	0	4958642	336	CDM	0	

CDM Import Monthly 9:00