

LBXCentral  
Image Archive  
Administrator Guide  
and  
Notification's Administrator Guide

Version 7.0

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## 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.

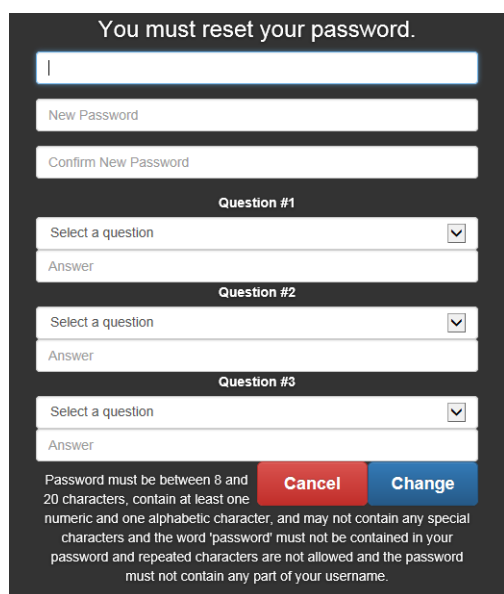


Please sign in

## 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.



You must reset your password.

**Question #1**

Select a question

**Question #2**

Select a question

**Question #3**

Select a question

Password must be between 8 and 20 characters, contain at least one numeric and one alphabetic character, and may not contain any special characters and the word 'password' must not be contained in your password and repeated characters are not allowed and the password must not contain any part of your username.

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: **Password1**; 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.

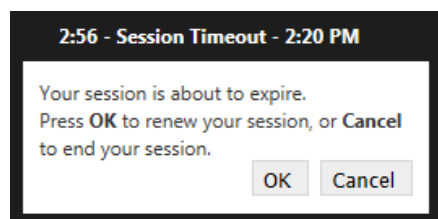
To maintain site security, it is recommended passwords be reset anytime there is a possibility a password or login information may have been revealed to unauthorized personnel.

**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.

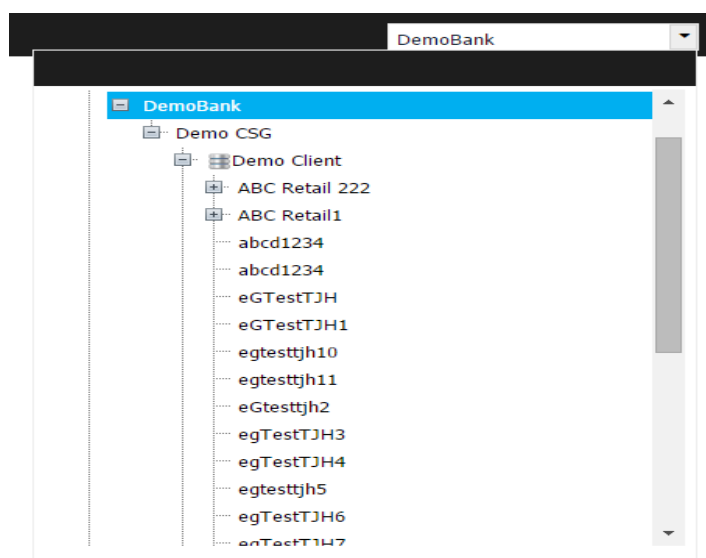
## Home Page Overview

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.

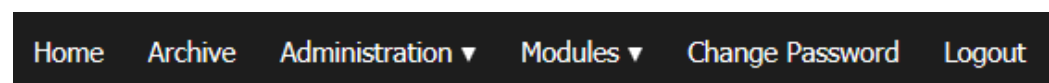
Access granted at one level provides access to all lower levels of the application. In this example, if a user's access is granted at the **Generic Bank** level, the user would have access to all lower levels (for example, the company Administrator). However, if the user's access is granted at the lowest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

## Broadcast Messages

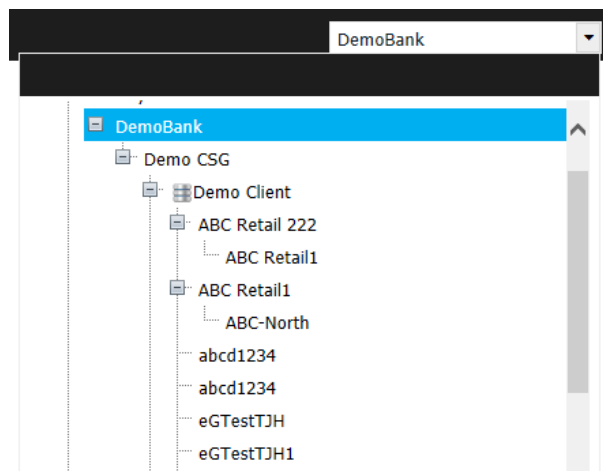


Broadcast messages may appear when the company has important information to share or when the Administrator has an important message for the staff using the application. This box appears on the left side of the home page. The system Administrator can create Broadcast messages to all users or to specific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

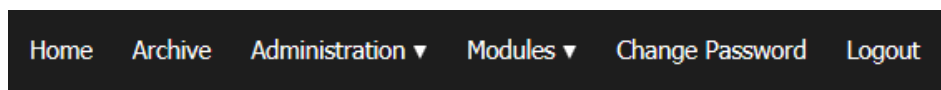
## Main Tool Bar



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.

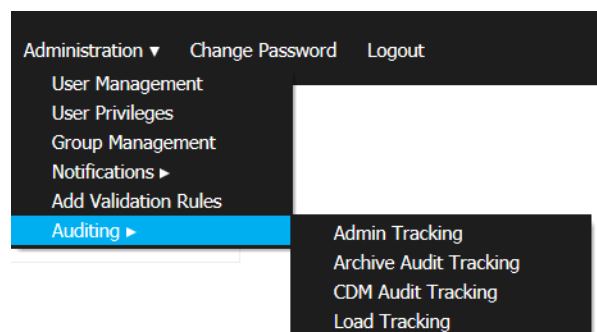
**Archive** – *Archive* allows access to multiple search options for data and images. Users can access the archive of images from this option, or within the *Archive* dropdown under *Modules*.

Note that the terms Archive, Long Term Archive and LTA are interchangeable.

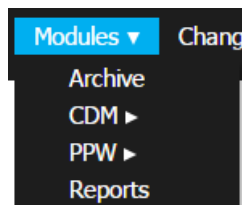


**Administration** – The *Administration* module provides the Administrator with the tools to create, modify and delete users, provide specific entitlements for the user, manage group information and reports showing the activity of the users in the various sections of the application.

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.

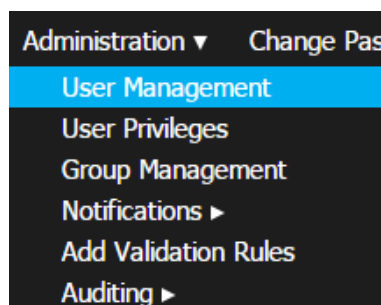
*Reminder:* Passwords must be between 8 and 50 characters, contain at least one upper-case letter, one lower-case letter and one number. It cannot contain repeat characters or the word 'password'.

**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

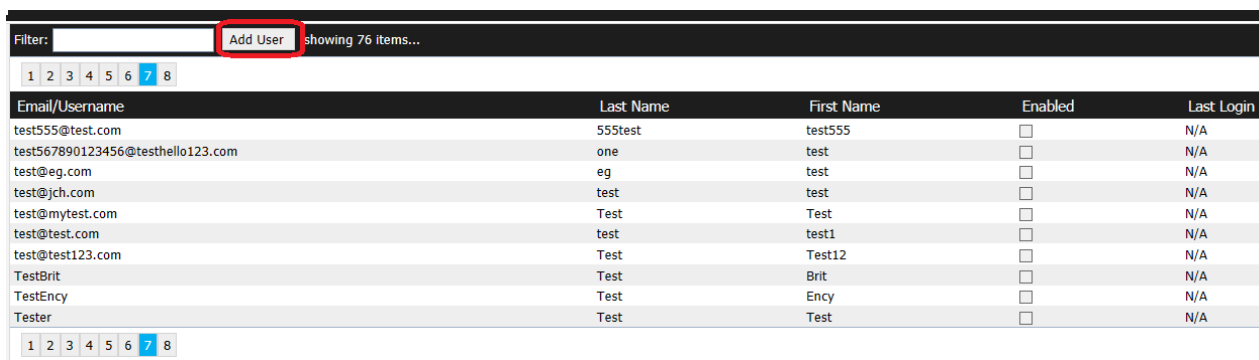


**User Management** is the area within LBXCentral where the Administrator creates, modifies or deletes users. Only those users entitled as Administrator–level users will have this option.

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



Email/Username	Last Name	First Name	Enabled	Last Login
test555@test.com	555test	test555	<input type="checkbox"/>	N/A
test567890123456@testhello123.com	one	test	<input type="checkbox"/>	N/A
test@eg.com	eg	test	<input type="checkbox"/>	N/A
test@jch.com	test	test	<input type="checkbox"/>	N/A
test@mytest.com	Test	Test	<input type="checkbox"/>	N/A
test@test.com	test	test1	<input type="checkbox"/>	N/A
test@test123.com	Test	Test12	<input type="checkbox"/>	N/A
TestBrit	Test	Brit	<input type="checkbox"/>	N/A
TestEncy	Test	Ency	<input type="checkbox"/>	N/A
Tester	Test	Test	<input type="checkbox"/>	N/A

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

Enter the new user information.

The screenshot shows the 'Add User' form with several red error messages: 'First name is required.' next to the First Name field, 'Last name is required.' next to the Last Name field, 'Password must be between 8 and 20 characters, contain at least one numeric and one alphabetic character, and may not contain any special characters.' next to the Password field, and 'Verify password is required.' next to the Verify Password field. The form includes fields for First Name, Last Name, Password, and Verify Password, along with checkboxes for 'Enabled' and 'User1' through 'User5'. A tree view on the left shows 'Available' clients: Demo Client and ABC Retail 222. On the right, there is an 'Assigned' field and buttons for View, Remove, and Edit.

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.

The screenshot shows the 'Add User' form with data entered: Email/Username: test@Demo.com, Notification Address: test@Demo.com, First Name: Tim, Last Name: Tester, Password: [masked], and Verify Password: [masked]. The 'Enabled' checkbox is checked. The 'User1' through 'User5' fields are empty. The 'Available' tree view shows: Demo Client, ABC Retail 222, ABC Retail1, abcd1234, abcd1234, eGTestTJH, and CTTestTJH1. A red box highlights the '>>' button between the Available and Assigned lists. At the bottom left, a red box highlights the 'Save' button. The 'Assigned' field is empty, and buttons for View, Remove, and Edit are visible on the right.

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:

Add User

Demo Client- test@Demo.com

<input type="checkbox"/> Select All	<input type="checkbox"/> Notifications Admin	<input type="checkbox"/> Sweep Admin
<input type="checkbox"/> Stop File Admin	<input type="checkbox"/> Audit	<input type="checkbox"/> Exception3 User
<input checked="" type="checkbox"/> Export Pdf	<input type="checkbox"/> Group Admin	<input type="checkbox"/> User Admin
<input type="checkbox"/> Password Admin	<input type="checkbox"/> Exception2 User	<input type="checkbox"/> Exceptions Supervisor
<input type="checkbox"/> Exception7 User	<input type="checkbox"/> Exception6 User	<input type="checkbox"/> Exception5 User
<input type="checkbox"/> Exception4 User	<input type="checkbox"/> Exception1 User	<input type="checkbox"/> CDM User
<input checked="" type="checkbox"/> Report User	<input checked="" type="checkbox"/> Archive User	<input type="checkbox"/> Admin

This is an example of a typical Administrator Role assignment:

Add User

Demo Client- test@Demo.com

<input type="checkbox"/> Select All	<input type="checkbox"/> Notifications Admin	<input type="checkbox"/> Sweep Admin
<input type="checkbox"/> Stop File Admin	<input checked="" type="checkbox"/> Audit	<input type="checkbox"/> Exception3 User
<input checked="" type="checkbox"/> Export Pdf	<input checked="" type="checkbox"/> Group Admin	<input checked="" type="checkbox"/> User Admin
<input type="checkbox"/> Password Admin	<input type="checkbox"/> Exception2 User	<input type="checkbox"/> Exceptions Supervisor
<input type="checkbox"/> Exception7 User	<input type="checkbox"/> Exception6 User	<input type="checkbox"/> Exception5 User
<input type="checkbox"/> Exception4 User	<input type="checkbox"/> Exception1 User	<input type="checkbox"/> CDM User
<input checked="" type="checkbox"/> Report User	<input checked="" type="checkbox"/> Archive User	<input type="checkbox"/> Admin

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

Add User

Demo Client- test@Demo.com

<input type="checkbox"/> Select All	<input type="checkbox"/> Notifications Admin	<input type="checkbox"/> Sweep Admin
<input type="checkbox"/> Stop File Admin	<input type="checkbox"/> Audit	<input type="checkbox"/> Exception3 User
<input type="checkbox"/> Export Pdf	<input type="checkbox"/> Group Admin	<input type="checkbox"/> User Admin
<input type="checkbox"/> Password Admin	<input type="checkbox"/> Exception2 User	<input type="checkbox"/> Exceptions Supervisor
<input type="checkbox"/> Exception7 User	<input type="checkbox"/> Exception6 User	<input type="checkbox"/> Exception5 User
<input type="checkbox"/> Exception4 User	<input type="checkbox"/> Exception1 User	<input type="checkbox"/> CDM User
<input type="checkbox"/> Report User	<input type="checkbox"/> Archive User	<input checked="" type="checkbox"/> Admin

### 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.

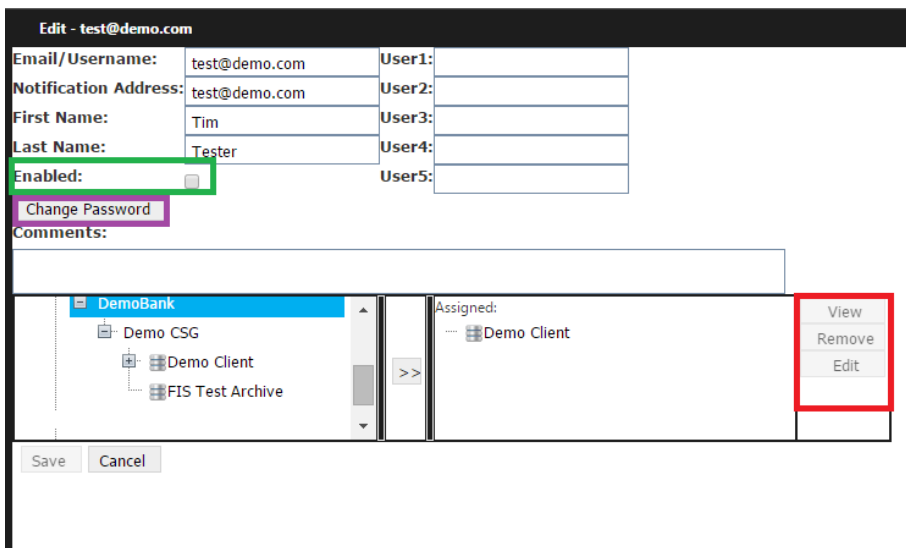
If there are more users than can be displayed on the page, a user can be located by a search feature, called **Filter**, displayed at the top left corner of the user display list.

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



Email/Username	Last Name	First Name	Enabled	Last Login
test@demo.com	Tester	Tim	<input checked="" type="checkbox"/>	N/A

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.



**Edit - test@demo.com**

Email/Username: test@demo.com    User1:

Notification Address: test@demo.com    User2:

First Name: Tim    User3:

Last Name: Tester    User4:

Enabled:     User5:

Change Password

Comments:

Assigned: Demo Client

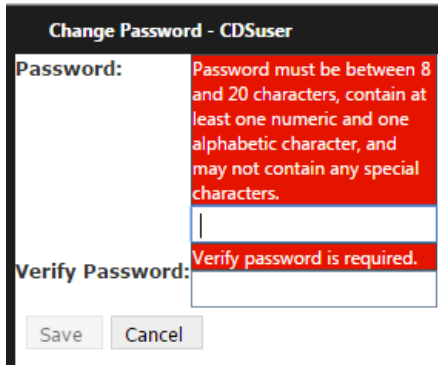
View, Remove, Edit

Save, Cancel

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.

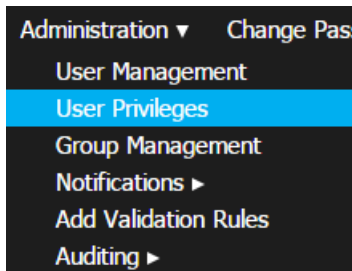
## Reset User Password

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).

Select a Group:   Show Disabled Users

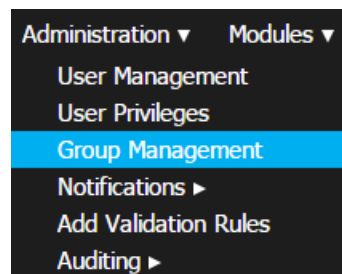
---

Group Name	User Name	Login ID	Disabled	Admin	ArchiveUser	ReportUser	CDM
<b>Demo Client</b>							
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

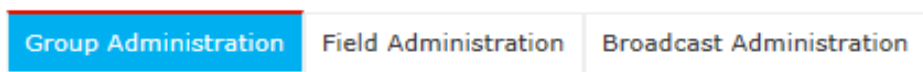
### NOT REQUIRED FOR BASIC ADMINISTRATORS AND USER RIGHTS

#### 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.



Group Administration   Field Administration   Broadcast Administration

**Organization Management**

Add Group

- [-] DemoBank
  - [-] Demo CSG
    - [-] Demo Client
      - [-] ABC Retail 222
        - [-] ABC Retail1
      - [-] ABC Retail1
        - [-] ABC-North
          - abcd1234
          - abcd1234
          - eGTestTJH
          - eGTestTJH1
          - egtesttjh10
          - egtesttjh11
          - eGtesttjh2
          - egTestTJH3
          - egTestTJH4
          - egtesttjh5
          - egTestTJH6
          - egTestTJH7
          - enTestTJH8

**Group Details** (Editing)

Name: DemoBank  
 Code: DEMOBANK  
 Category:  
 Description: Demo Bank  
 Enabled:   
 Restrict Access:

By default multi-factor authentication (MFA) uses challenge response questions and answers. Enabling one time passwords will use that method of MFA instead of the questions and answers.

Enable Multi-factor Authentication (MFA)  
 Enable One Time Passwords  
 Allow cookie for MFA  
 Force MFA onto sub-groups.

Save

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**.

Group Administration

**Organization Management**

Add Group

- [-] DemoBank
  - [-] Demo CSG
    - [-] Demo Client
      - [-] ABC Retail 222
        - [-] ABC Retail1
      - [-] ABC Retail1
        - [-] ABC-North

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.

## Group Details (Adding)

Name:

Code:

Category:

Description:

Enabled:

Restrict Access:

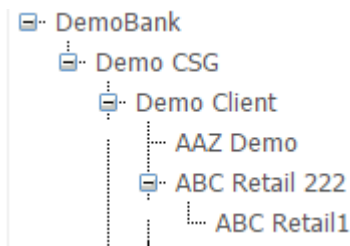
By default multi-factor authentication (MFA) uses challenge response questions and answers. Enabling one time passwords will use that method of MFA instead of the questions and answers.

- Enable Multi-factor Authentication (MFA)
- Enable One Time Passwords
- Allow cookie for MFA
- Force MFA onto sub-groups.

- Enable Stop File Administration.

Save

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.

Group Administration **Field Administration** Broadcast Administration

**Field Management**

Module: Long Term Archive

Fields

Type	Field	Label	Display on Search	Require on Search	Display on Results	
Edit	Checks	ItemType	Item Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	AccountNumber	sample acct	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	Amount	Amount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Checks	CheckNum	CHECKNUMBER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	CheckRTNum	Rout & Trans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	SysSeqNum	Sequence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	Amount1	Amount1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Checks	Amount10	Amount10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

Group Administration **Field Administration** Broadcast Administration

**Field Management**

Module: Long Term Archive

Fields **Details**

[Checks.ItemType]

**Appearance**

Field Label:

Description:

Display on Search:

Require on Search:

Display on Results:

Display Order:

Editable:

Default Value:

Update Field

**Filters**

[filter list]

No filters.

Add

**Valid Values**

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

Edit	Trans	SiteID	Site Id	<input checked="" type="checkbox"/>
<b>Edit</b>	<b>Trans</b>	<b>SubSiteID</b>	<b>Client ID</b>	<input checked="" type="checkbox"/>
Edit	Trans	CID	CID	<input type="checkbox"/>

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**.

### Filters

[Filter List]

No filters.

Add

[Filter Builder]

Operator:

Equals

Value From:

1

Value To:

1

Save

### Valid Values

[Valid Values]

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

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

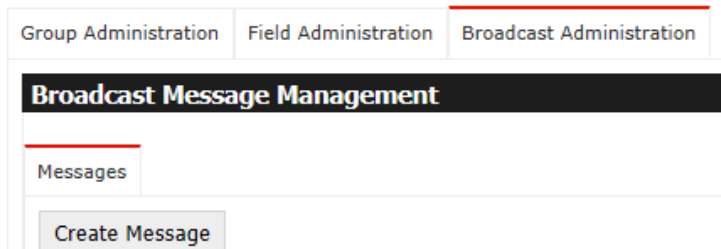
[Valid Values]

Value	Display Value
Delete 123456	123456
Delete 654321	654321
Delete 777777	777777
Insert <input type="text"/>	<input type="text"/>

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

Check Level	
Item Type:	Equals <input type="text"/> Select <input type="text"/>
CHECKNUMBER:	Equals <input type="text"/> Select <input type="text"/>
Sequence:	Equals <input type="text"/> 123456 <input type="text"/>
sample acct:	Equals <input type="text"/> 654321 <input type="text"/>
	777777 <input type="text"/>

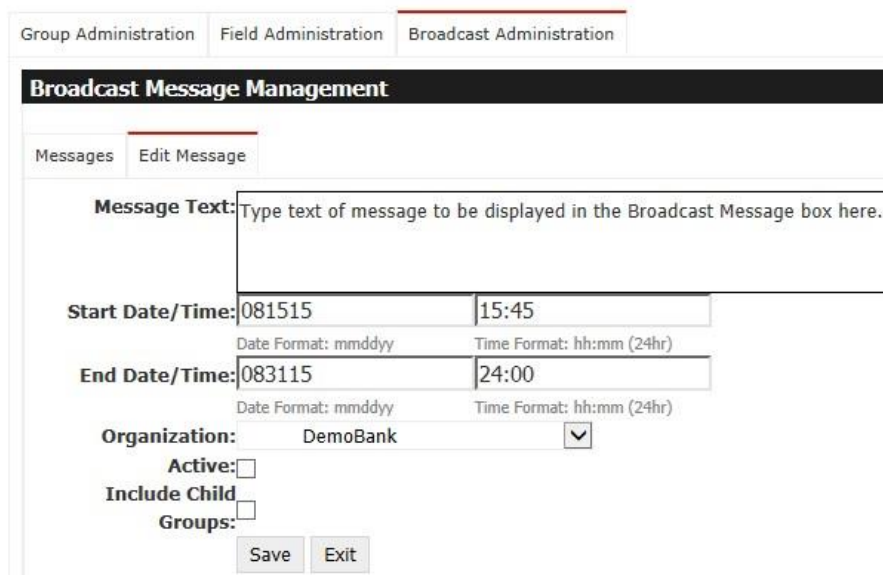
## Broadcast Administration



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.

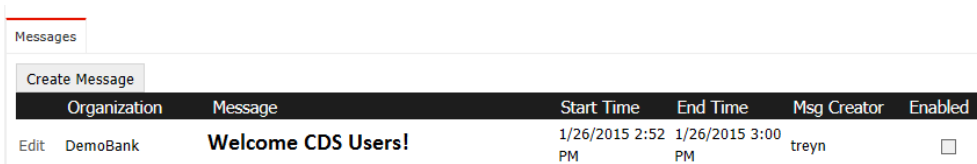


The screenshot shows the 'Edit Message' form within the 'Broadcast Message Management' interface. The 'Messages' sub-tab is selected. The form contains the following fields and options:

- Message Text:** A text area with the placeholder text: "Type text of message to be displayed in the Broadcast Message box here."
- Start Date/Time:** Two input fields containing "081515" and "15:45". Below these are labels "Date Format: mmddyy" and "Time Format: hh:mm (24hr)".
- End Date/Time:** Two input fields containing "083115" and "24:00". Below these are labels "Date Format: mmddyy" and "Time Format: hh:mm (24hr)".
- Organization:** A dropdown menu currently showing "DemoBank".
- Active:** A checkbox that is currently unchecked.
- Include Child Groups:** A checkbox that is currently unchecked.
- Buttons:** "Save" and "Exit" buttons at the bottom of the form.

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.



The screenshot shows a table listing broadcast messages. The table has columns for Organization, Message, Start Time, End Time, Msg Creator, and Enabled. A single message is listed:

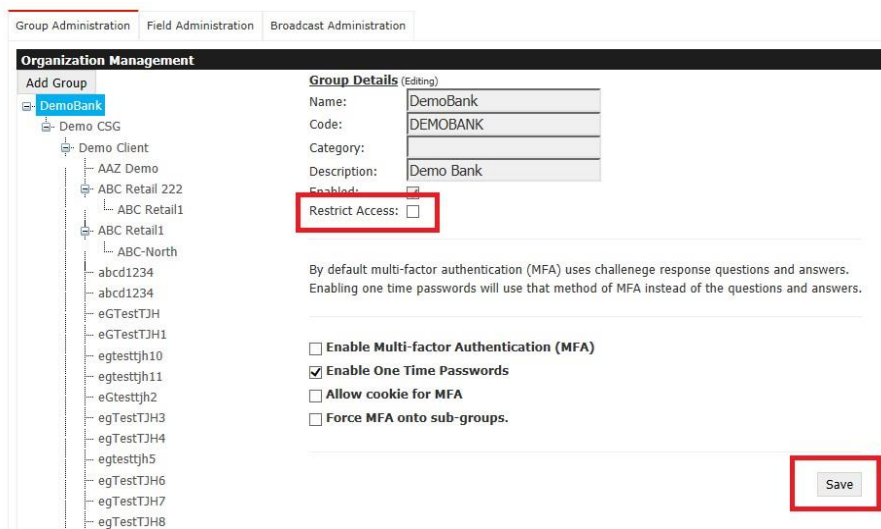
Organization	Message	Start Time	End Time	Msg Creator	Enabled
Edit DemoBank	Welcome CDS Users!	1/26/2015 2:52 PM	1/26/2015 3:00 PM	treyn	<input type="checkbox"/>

## 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.

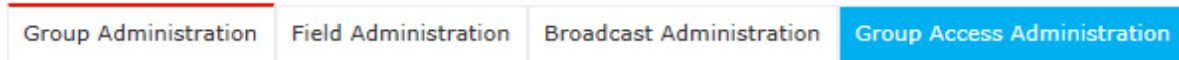
LBXCentral is a secured application. In order for a user to work from home, their IP VPN information must be added to the validated user list to allow remote access and yet still remain secure.

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.



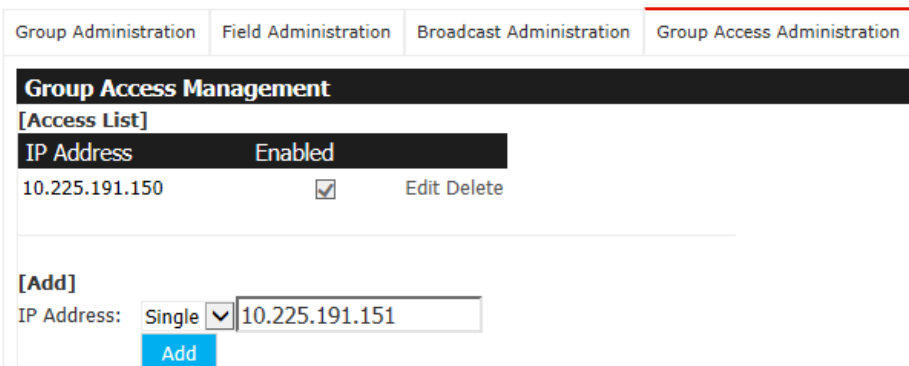
The screenshot shows the 'Group Administration' screen. On the left is a tree view of the organization structure. The main area is titled 'Group Details (Editing)' for the 'DemoBank' group. The 'Restrict Access' checkbox is highlighted with a red box. Below it, there are several other checkboxes: 'Enable Multi-factor Authentication (MFA)', 'Enable One Time Passwords' (checked), 'Allow cookie for MFA', and 'Force MFA onto sub-groups'. A 'Save' button is also highlighted with a red box.

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



The screenshot shows the navigation tabs at the top of the application. The tabs are 'Group Administration', 'Field Administration', 'Broadcast Administration', and 'Group Access Administration'. The 'Group Access Administration' tab is highlighted in blue, indicating it is the active tab.

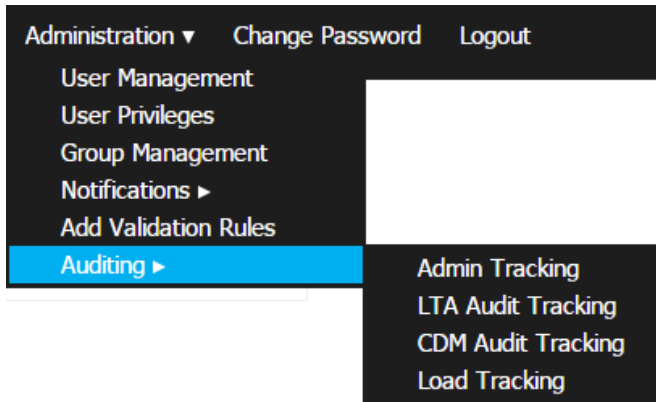
A single IP or a range of IP addresses can be added by selecting either **Single** or **Range** from the pull down.



The screenshot shows the 'Group Access Management' screen. At the top, there are tabs for 'Group Administration', 'Field Administration', 'Broadcast Administration', and 'Group Access Administration'. The main area is titled 'Group Access Management' and contains an 'Access List' table with one entry: '10.225.191.150' with an 'Enabled' checkbox checked and 'Edit Delete' links. Below the table is an 'Add' form with a dropdown menu set to 'Single' and a text input field containing '10.225.191.151'. An 'Add' button is located below the input field.

## 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 121814

User: (All)

Report Type:  **Administrative**  Authentication

User	Activity Time	Task
admin3g	12/17/2014 8:33:31 AM	Updated user 'demo3 test', Modified Access: Added Notifications Admin access to ABC Retail 222, Sweep Admin access to ABC Retail 222, Stop File Admin access to ABC Retail 222, Audit access to ABC Retail 222, Exception3 User access to ABC Retail 222, Export
admin3g	12/17/2014 8:33:40 AM	Updated user 'demo3 test', Modified Access:   Removed Notifications Admin access to ABC Retail 222, Sweep Admin access to ABC Retail 222, Stop File Admin access to ABC Retail 222, Audit access to ABC Retail 222, Exception3 User access to ABC Retail 222, E



### Admin Report

**Group:** Demo Client    
**Date:** 121714 to 022815   
**User:** (All)    
**Report Type:**  Administrative  Authentication

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

Download

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

**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:  SiteID:

Date:  to

Report Type:  Summary  Detail

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

*Detail View:*

**Load Report**

Client:  SiteID:

Date:  to

Report Type:  Summary  Detail

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

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Version 7.0

## **Confidentiality Statement**

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## 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.

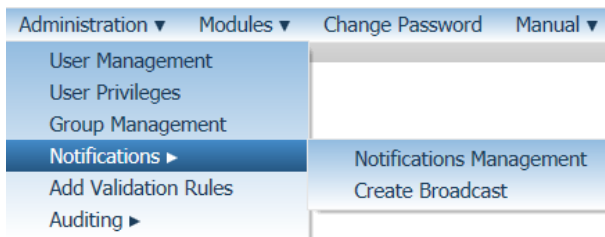


Figure 1: Notifications Management Menu

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

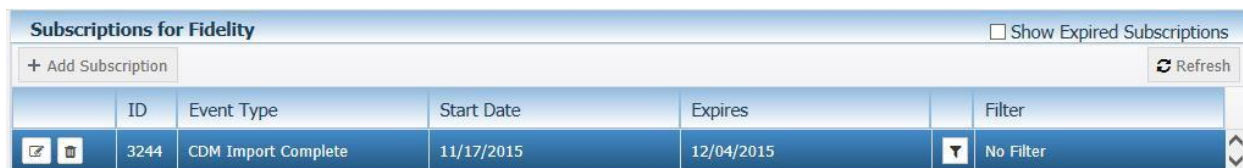


Figure 2: Subscriptions Screen

## 2.1 Add New Subscription

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

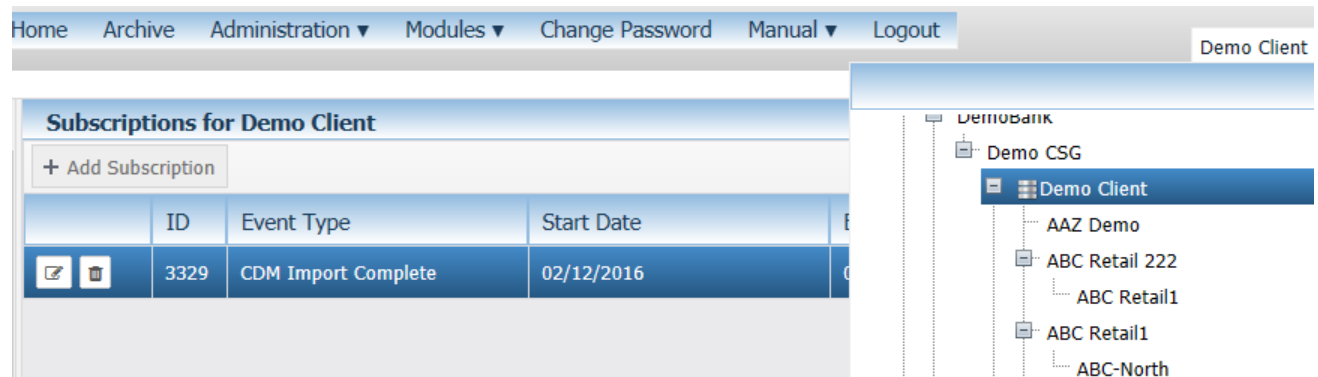


Figure 3: Entity Drop-down List

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.

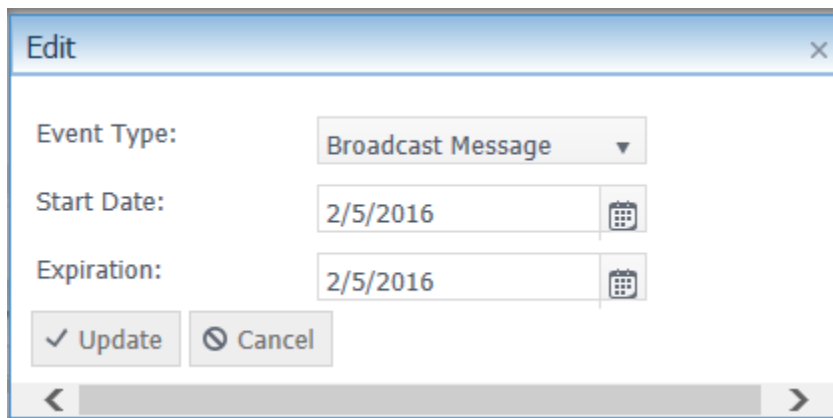


Figure 4: Subscription Creation Pop-up Box

Choose the Event Type from the drop-down list.

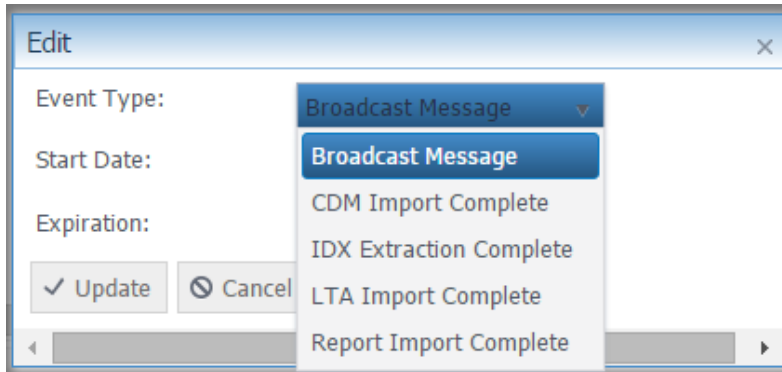
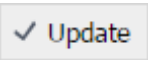



Figure 5: Event Type Drop-down List

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


Click  to cancel.

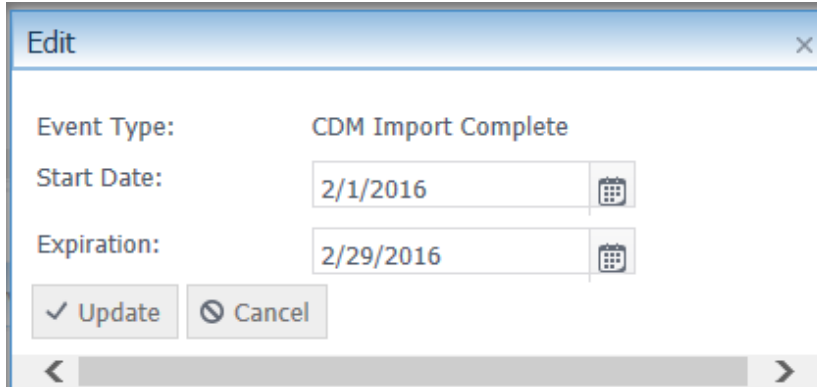
Subscriptions for ABC-North						<input type="checkbox"/> Show Expired Subscriptions
+ Add Subscription						
	ID	Event Type	Start Date	Expires	Filter	
	3345	Report Import Complete	01/01/2016	03/31/2016		
	3344	Broadcast Message	02/01/2016	02/29/2016		
	3343	CDM Import Complete	01/01/2016	12/31/2016		
	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

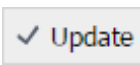
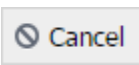
To edit a subscription in the list, click  beside the item you wish to edit. An edit box will open allowing you to make changes to the start date or the Expiration date.



The 'Edit' dialog box contains the following fields and controls:

- Event Type: CDM Import Complete
- Start Date: 2/1/2016 (with a calendar icon)
- Expiration: 2/29/2016 (with a calendar icon)
- Buttons: Update (with a checkmark icon) and Cancel (with a close icon)

Figure 7: Edit Pop-up

Click  to update the subscription with changes or  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.

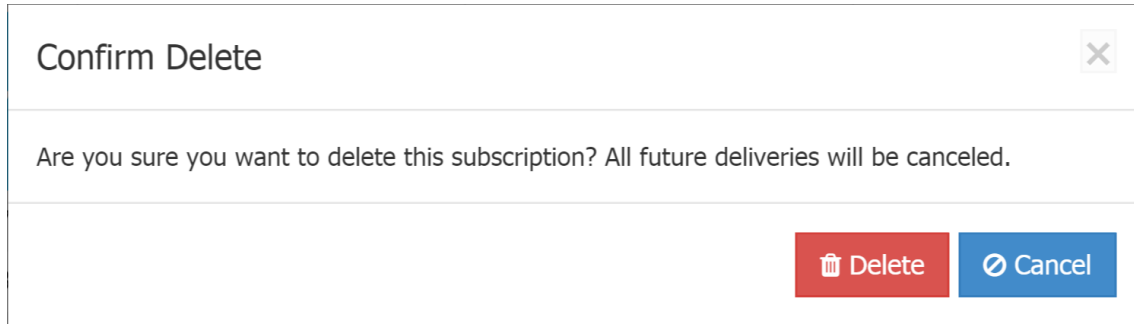





Figure 9: Confirm Delete Pop-up

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

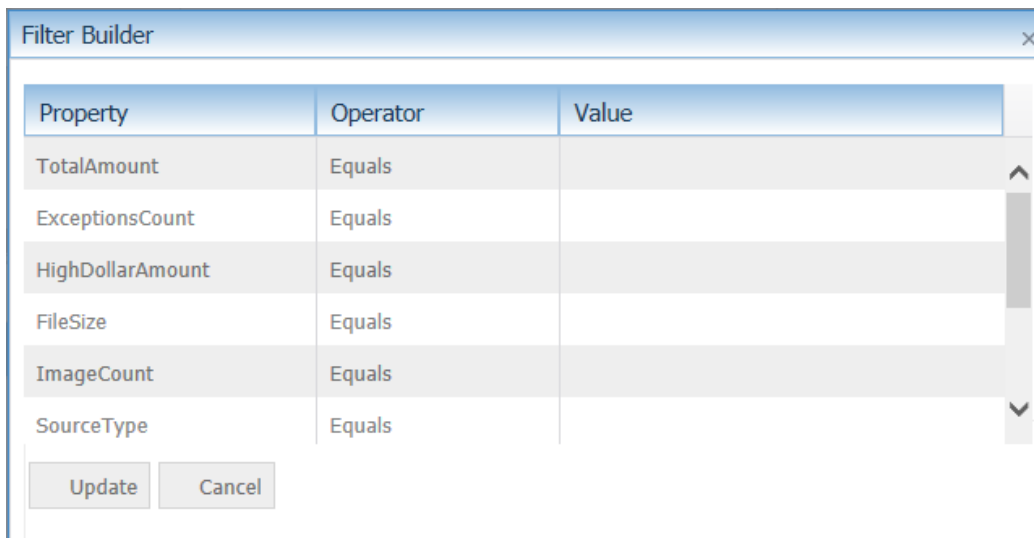


Figure 10: Filter Builder Pop-up

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

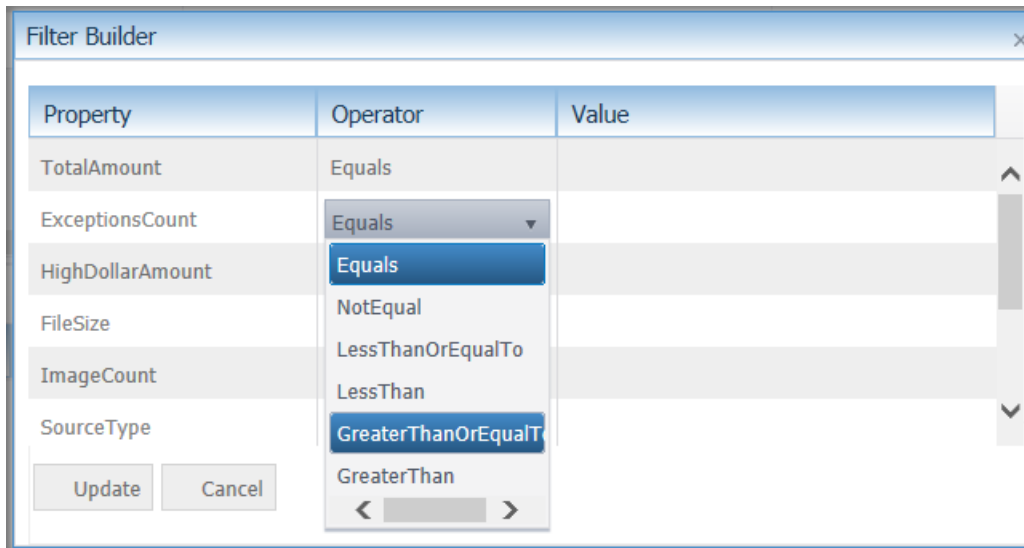


Figure 11: Operator Drop-down List

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.

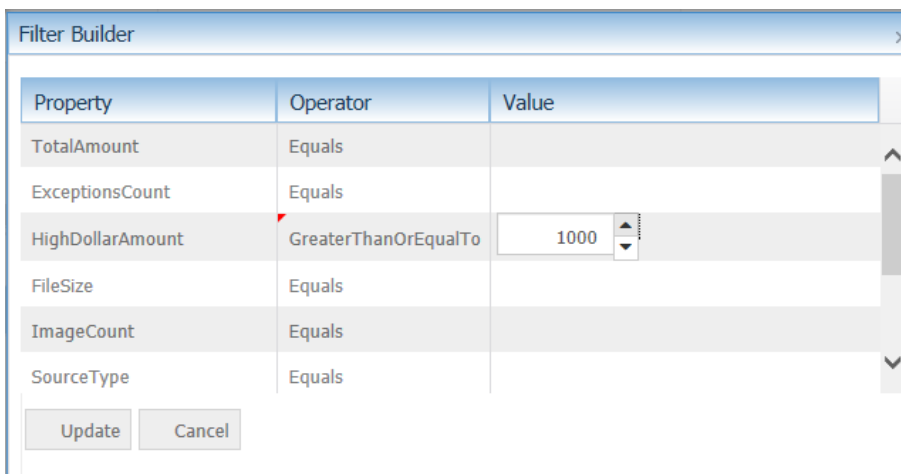
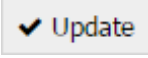
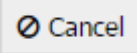


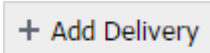
Figure 12: Operator Values

Enter the appropriate filter value(s) for the Property items and then click  to add the Filters or  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.

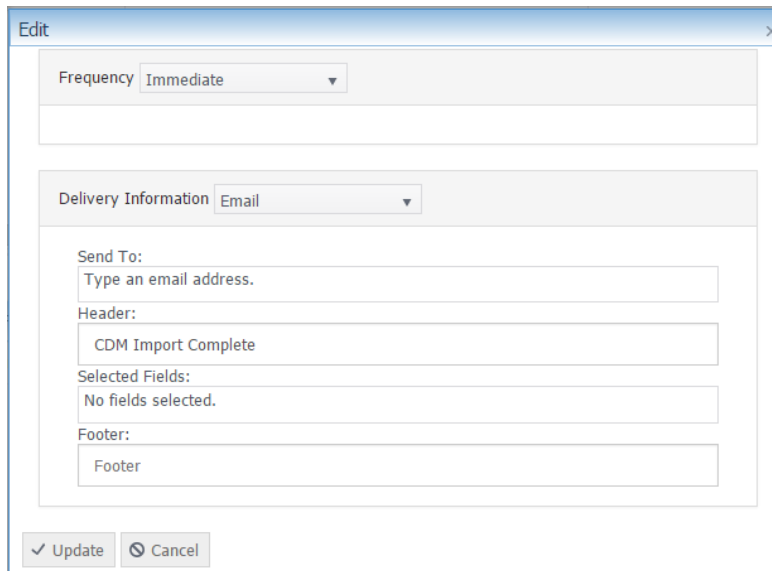
A screenshot of a web application window titled 'Edit'. The window has a light blue header bar with the title and a close button. Below the header, there are several sections. The first section is labeled 'Frequency' and contains a dropdown menu with 'Immediate' selected. Below this is a text input field. The second section is labeled 'Delivery Information' and contains a dropdown menu with 'Email' selected. Below this are four text input fields: 'Send To:' with the placeholder 'Type an email address.', 'Header:' with the text 'CDM Import Complete', 'Selected Fields:' with the text 'No fields selected.', and 'Footer:' with the text 'Footer'. At the bottom of the window, there are two buttons: 'Update' with a checkmark icon and 'Cancel' with a close icon.

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

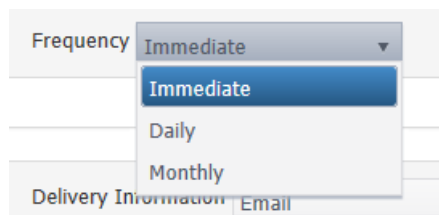
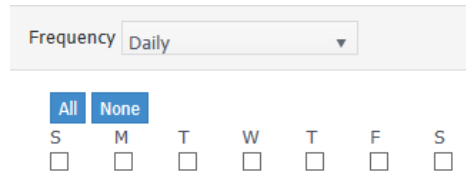


Figure 14: Frequency Drop-down List Immediate

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



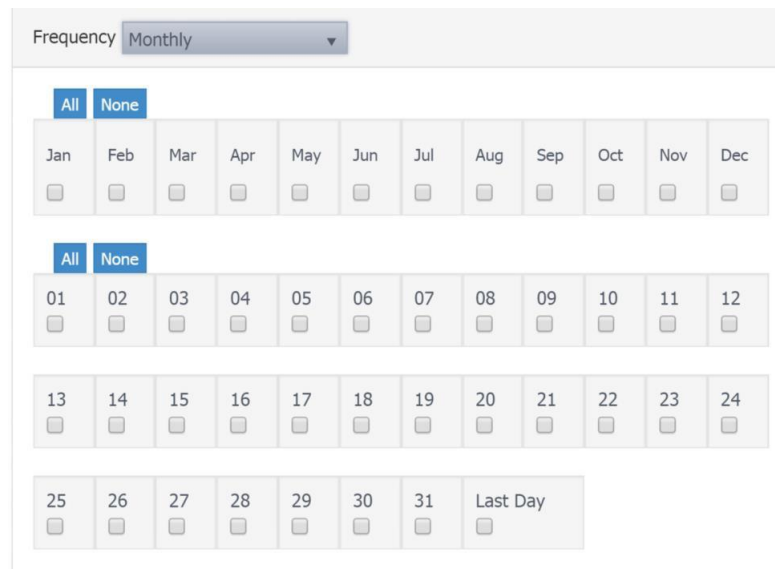
Frequency Daily

**All** **None**

S M T W T F S

Figure 15: Frequency Drop-down List Daily

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



Frequency Monthly

**All** **None**

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

**All** **None**

01 02 03 04 05 06 07 08 09 10 11 12

13 14 15 16 17 18 19 20 21 22 23 24

25 26 27 28 29 30 31 Last Day

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.

Delivery Information Email

Send To:  
abc@gmail.com × anno@test.com × mly@test.com ×

Header:  
 CDM Import Complete

Selected Fields:  
ExceptionsCount × SourceType × TimeElapsed ×

Update  
 TotalAmount  
 HighDollarAmount  
 FileSize  
 ImageCount  
**ErrorMessage**  
 ItemCount  
 Status

Figure 17: Selected Fields Drop-down List

- d. Create a **Footer** (optional).
- e. Click  to add the Delivery Method or  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.

Subscriptions for ABC-North						<input type="checkbox"/> Show Expired Subscriptions
+ Add Subscription						<input type="button" value="Refresh"/>
	ID	Event Type	Start Date	Expires	Filter	
<input type="checkbox"/> <input type="checkbox"/>	3333	Broadcast Message	02/15/2016	02/15/2016	Message Equals This is a test broadcast message.	^
<input checked="" type="checkbox"/> <input type="checkbox"/>	3334	CDM Import Complete	02/01/2016	02/15/2016	ExceptionsCount >= 1 HighDollarAmount >= 10 ImageCount >= 1	
<input type="checkbox"/> <input type="checkbox"/>	3335	LTA Import Complete	01/01/2016	12/31/2016	No Filter	
<input type="checkbox"/> <input type="checkbox"/>	3336	Report Import Complete	01/01/2016	03/31/2016	No Filter	v

Subscriptions for ABC-North					
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	

Figure 18: Show Only Expired Subscriptions

## Notification Email Examples

**From:** [donotreply@fislbxcentral.com](mailto:donotreply@fislbxcentral.com) [<mailto:donotreply@fislbxcentral.com>]  
**Sent:** Tuesday, March 08, 2016 8:49 AM  
**To:** [test@gmail.com](mailto: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) [<mailto:donotreply@fislbxcentral.com>]

**Sent:** Tuesday, March 08, 2016 8:49 AM

**To:** [test@gmail.com](mailto: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) [<mailto:donotreply@fislbxcentral.com>]

**Sent:** Tuesday, March 08, 2016 9:00 AM

**To:** [test@gmail.com](mailto:test@gmail.com)

**Subject:** CDM Import Complete

CDM Import Complete

ExceptionsCount	HighDollarAmount	FileSize	ImageCount	SourceType	TotalAmount	ErrorMessage
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0	0	4958642	336	CDM	0	
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CDM Import Monthly 9:00