

# iRemit

## Administration Guide

Version 7

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# Contents

<b>About this guide</b> .....	<b>5</b>
<b>Get started</b> .....	<b>5</b>
Check your computer software .....	5
Session timeout .....	5
Home page overview .....	6
Main toolbar .....	6
Group selection area .....	7
Broadcast messages .....	8
Administration menu .....	8
<b>User management</b> .....	<b>8</b>
Add a user .....	9
Assign roles .....	10
Available roles .....	10
Edit a user .....	12
Reset a user password .....	13
Enable or disable a user .....	13
Delete a user .....	13
<b>User privileges</b> .....	<b>14</b>
<b>Group management</b> .....	<b>14</b>
Group Administration .....	14
Add a subgroup .....	15
Multi-Factor Authentication .....	16
Enable Stop File Administration .....	17
Restrict Access .....	18
Field Administration .....	19
Appearance .....	20
Filters .....	21
Valid Values .....	22
Broadcast Administration .....	23
<b>Auditing</b> .....	<b>24</b>
Admin Report .....	24
Administrative .....	25
Authentication .....	26
History Audit Report .....	26
Searches by users .....	27
Images viewed by user .....	27

Exception Decisioning Audit Report .....	28
Load Report .....	28
Summary .....	29
Detail .....	29
<b>Optional administration modules .....</b>	<b>30</b>
Stop File Management .....	30
Exception Decisioning Sweep Management .....	30
IDX Administration .....	32

# About this guide

Top Image Systems' secure iRemit interface provides access to lock box image archive and reporting.

This guide helps company designated administrators to familiarize themselves with the functionality and responsibilities associated with iRemit, including user maintenance, group maintenance, data searches, reporting, and efficient and effective access of the image archive.

The iRemit application consists of History Archive, Daily Summary, Exception Decisioning and Reporting.

## Get started

This section lists the software requirements for using iRemit and provides an overview of the **Home** page and the **Administration** menu.

## Check your computer software

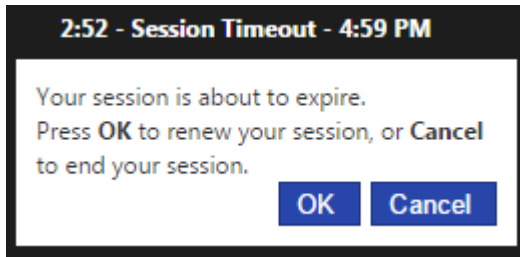
To view images stored in the archive, you must have two different types of free software installed:

- 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, contact your desktop support group for assistance.

## Session timeout

The system will timeout after a certain amount of inactivity (this is configurable). After a timeout, you must access the application again via SSO. A warning message is displayed three minutes prior to timeout. In the following example, the session will timeout at 4:59 PM. The remaining time in the session is 2:52 minutes, unless you click on the **OK** button to renew the session.



## Home page overview

This section provides a brief description of the main areas of the home page.

### Main toolbar

The main toolbar is located at the center top of the website pages. There are different toolbars depending on which level of the hierarchy you are accessing. The following toolbar is displayed at the top level of information.



When you access other levels of information, such as a specific lock box, a different toolbar is displayed. The features in the toolbar may vary from user to user, depending on the user's roles.

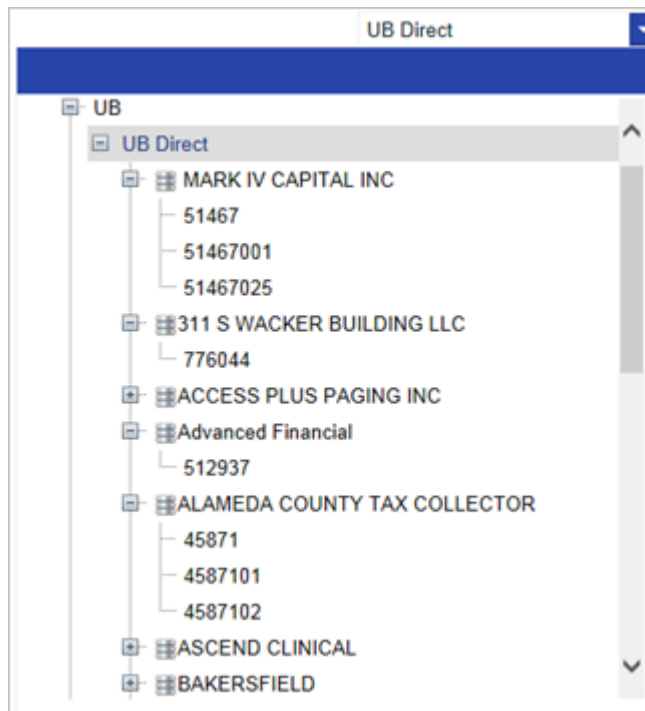
The following table provides a brief summary of each function:

Function	Description
Home	<p>The <b>Home</b> page allows you to select a group from the <b>Group</b> selection area located on the right. See <a href="#">Group selection area</a> for more information.</p> <p>It also displays <a href="#">broadcast messages</a>.</p> <p>Selecting the <b>Home</b> function returns you to the <b>Home</b> page from any page within the application.</p>
History	<p><b>History</b> provides access to multiple search options for data and images in the archive. You can access the archive of images from this function, or from the <b>Modules</b> function.</p>
Administration	<p><b>Administration</b> enables administrators to manage users and groups, and provides access to <a href="#">audit reports</a> and <a href="#">optional administration modules</a>.</p> <p>Auditing is available to all users, but administrators may restrict the use of certain auditing features to specific users.</p>
Modules	<p><b>Modules</b> allows you to navigate to the work areas of iRemit to which you have been granted permissions.</p> <p>See the <i>iRemit User Guide</i> for details of each module.</p>

## Group selection area

To the right of the main tool bar on the home page is the **Group** selection area.

Click the arrow to the right of the selection box and select the group you want to view. To search for a group, enter the name of the group, or part of the name, in the selection box, then select the group from the search results. The selection defaults to the group that was selected when you last logged in.



Groups allow the definition of an organization’s data hierarchy. You can assign permissions to groups. You can allow users to all access all groups, or restrict access to a selected group of lock boxes.

The top level (in this example, **UB**), is mostly used for administration (user maintenance, user activity reports, and so on). Archive searches are not conducted at this level.

The second level, (in this example, **UB Direct**), is the main search level. Users and administrators can conduct searches of all archive data from this level.

The third and following levels represent the data for each separate subgroup of the company. An administrator can restrict user permissions to a specific group or subgroups. The level of permissions determine the view the user sees when accessing iRemit.

Access granted at one level provides access at all lower levels of the application. In the example above, if a user’s access is granted at the highest level of **UB Direct**, the user has access to all lower levels. However, if the user’s access is granted at the lowest level, for example, **512937**, that user only has access to work processed for the **Advanced Financial** lock box **512937**.

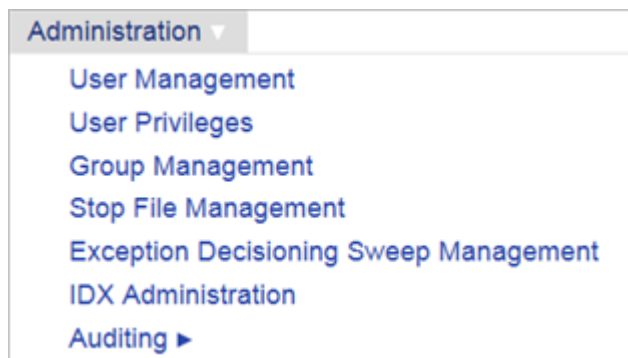
## Broadcast messages

Broadcast messages may appear on the left side of the home page when the company has important information to share or when the administrator has an important message for the staff using the application. A system administrator can create broadcast messages for all users or specific users. See [Broadcast administration](#) for more information.



## Administration menu

The **Administration** menu provides access to the administration functions.



iRemit offers several optional administrative modules, including **Stop File Management**, **Exceptions Decisioning Sweep Management**, and **Add Validation Rules**. These modules are only viewable if they are enabled.

## User management

The **User Management** option on the **Administration** menu enables you to create or modify users and assign access rights. Only users with the appropriate access rights can access **User Management**.

When you select **User Management**, the list of existing users is displayed. Each user's name is displayed as a hyperlink. Click on a user to open the user's profile and display the permissions granted to the user.

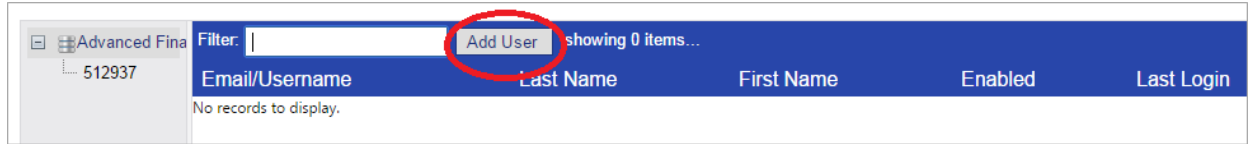
Filter: <input type="text" value="Tim"/>	Add User showing 1 items...				
Email/Username	Last Name	First Name	Enabled	Last Login	Password Created
Test	Tester	Tim	<input checked="" type="checkbox"/>	N/A	N/A

To search for a specific user, enter the last name or first name of the user in the **Filter** box, then press ENTER.

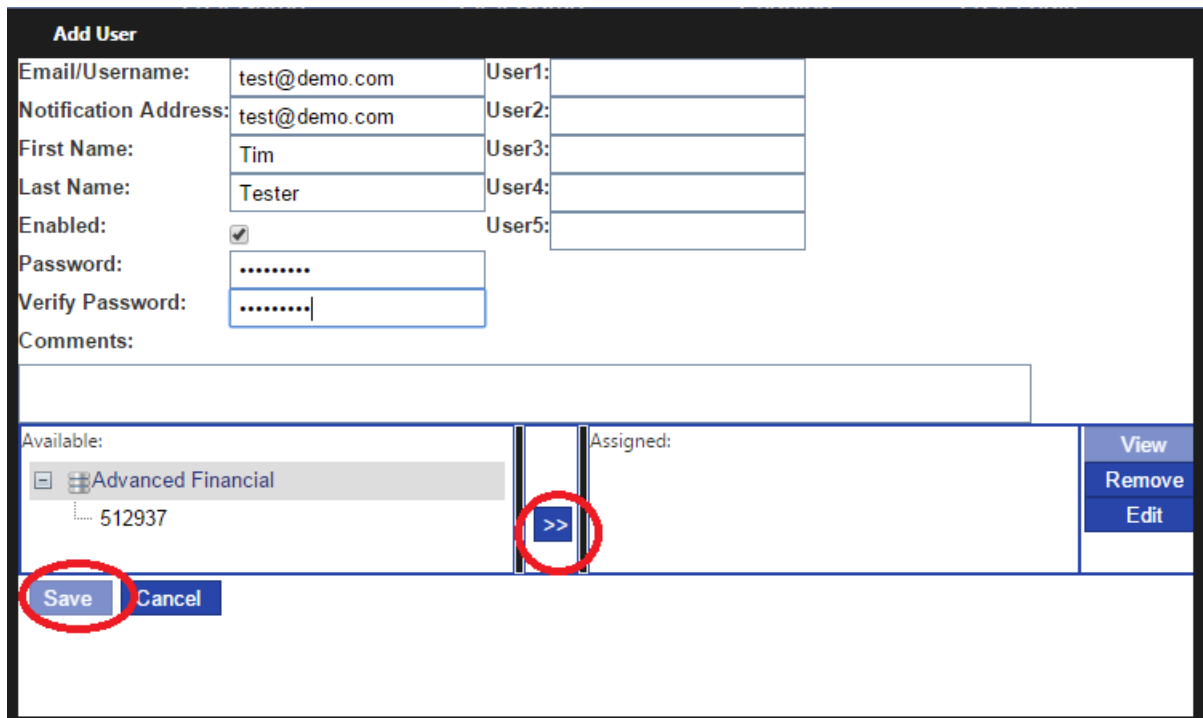


## Add a user

1. Click the **Add User** button.



2. In the **Add User** pop-up, enter the user details.



The 'Add User' pop-up form contains the following fields and controls:

- Email/Username:** test@demo.com
- Notification Address:** test@demo.com
- First Name:** Tim
- Last Name:** Tester
- Enabled:**
- Password:** [masked with dots]
- Verify Password:** [masked with dots]
- Comments:** [empty text area]
- User1 through User5:** Five empty input fields for user-level filters.
- Available:** A tree view showing 'Advanced Financial' and '512937'.
- Assigned:** An empty box for assigned access levels.
- Buttons:** 'View', 'Remove', 'Edit' (on the right); 'Save' (circled in red) and 'Cancel' (at the bottom left); and a double arrow '>>' button (circled in red) between the Available and Assigned boxes.

The password is an initial password that must be changed by the user the first time they log on.

The **User1** through **User5** fields enable you to add filters at the user level. This feature is currently not enabled.

3. In the **Available** box, select the level of access, then click on the double arrow button >> to move it to the **Assigned** box.
4. Click **Save**.

## Assign roles

You must assign at least one role for each user. The roles selection appears when you save a new user.

The following example shows a typical role assignment for a normal user:

Add User

### Advanced Financial-

<input type="checkbox"/> Select All	<input checked="" type="checkbox"/> Archive User	<input type="checkbox"/> Audit
<input type="checkbox"/> CDM Admin	<input type="checkbox"/> CDM Supervisor	<input type="checkbox"/> CDM User
<input checked="" type="checkbox"/> Download CSV	<input checked="" type="checkbox"/> Export Pdf	<input type="checkbox"/> Group Admin
<input type="checkbox"/> IDX_Admin	<input checked="" type="checkbox"/> IDX_Download	<input checked="" type="checkbox"/> Report User
<input type="checkbox"/> Stop File Admin	<input type="checkbox"/> Sweep Admin	<input type="checkbox"/> User Admin

The following example shows a typical role assignment for an administrator:

Add User

### Advanced Financial-

<input type="checkbox"/> Select All	<input checked="" type="checkbox"/> Archive User	<input checked="" type="checkbox"/> Audit
<input type="checkbox"/> CDM Admin	<input type="checkbox"/> CDM Supervisor	<input type="checkbox"/> CDM User
<input type="checkbox"/> Download CSV	<input checked="" type="checkbox"/> Export Pdf	<input type="checkbox"/> Group Admin
<input checked="" type="checkbox"/> IDX_Admin	<input type="checkbox"/> IDX_Download	<input checked="" type="checkbox"/> Report User
<input type="checkbox"/> Stop File Admin	<input checked="" type="checkbox"/> Sweep Admin	<input checked="" type="checkbox"/> User Admin

## Available roles

You can assign the following roles.

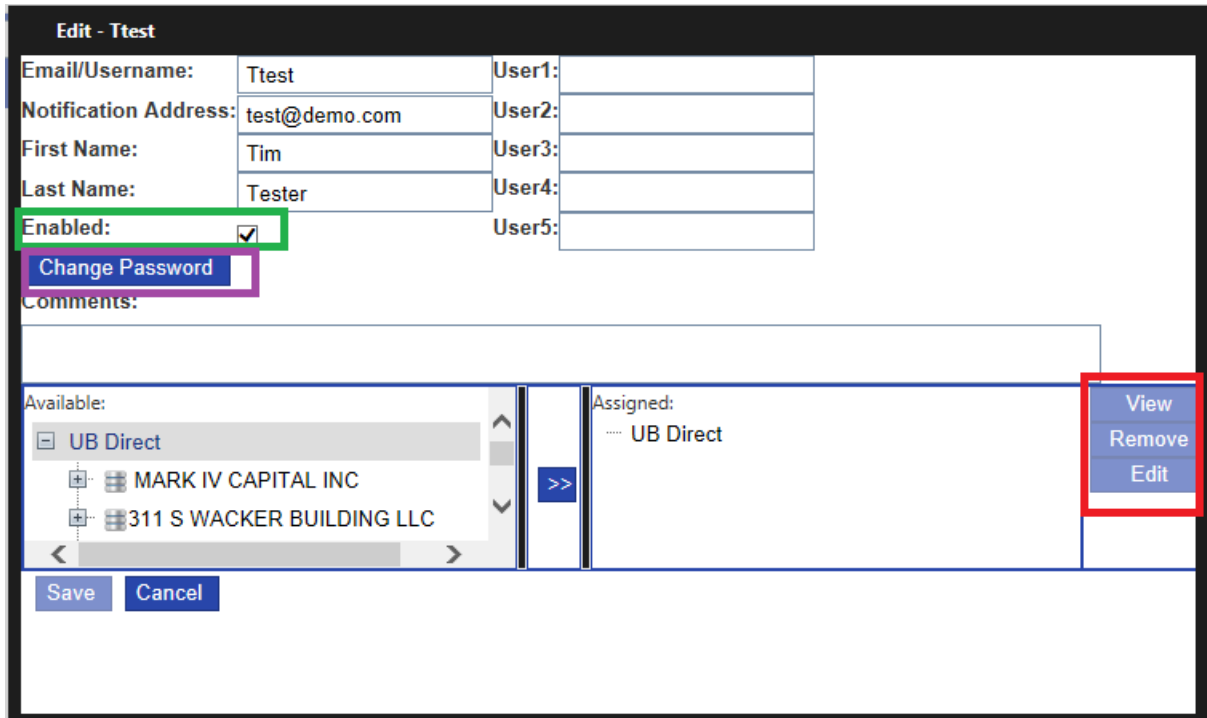
**Note:** Admin users cannot modify their own permissions.

<b>Role</b>	<b>Description</b>
Admin	This is a “super” admin role. This user has the combined roles of all administrative functions.
Archive User	The user can access all archive search options via the <b>History</b> function.
Audit	The user can access all audit search options via the <b>LTA</b> function.
Download CSV	The user can download data to a CSV file.
Export PDF	The user can download any archived data to a PDF file.
Exceptions Supervisor	This role is reserved for administrators using the <b>Exceptions Decisioning</b> module. The user can edit Exceptions Decisioning transactions.
Group Admin	The user can create, enable or disable groups, and establish and monitor group options within the application, including group reports, maintenance and broadcast messages.
IDX Admin	The user can set up extraction jobs and run Extract.
IDX Download	The user can download Extract at the subgroup level.
Password Admin	The user can create users and reset passwords. This does not apply to users accessing the application via SSO.
Report User	The user can access all reports in the system.
Stop File Admin	The user can upload a CSV stop file to be used as an Exception Decisioning validation.
Sweep Admin	The user can set daily sweeps and mini sweeps for Exception Decisioning clients.
User Admin	The user can set up users, assign roles and change passwords.

## Edit a user

1. In the user list, click on the user.
2. In the **Edit User** pop-up, click **Edit**.
3. Make the required changes.

To edit the user's roles, click **View**.



**Edit - Ttest**

Email/Username:	Ttest	User1:	
Notification Address:	test@demo.com	User2:	
First Name:	Tim	User3:	
Last Name:	Tester	User4:	
Enabled:	<input checked="" type="checkbox"/>	User5:	

**Change Password**

Comments:

Available:

- UB Direct
  - MARK IV CAPITAL INC
  - 311 S WACKER BUILDING LLC

>>

Assigned:

- UB Direct

**View**  
**Remove**  
**Edit**

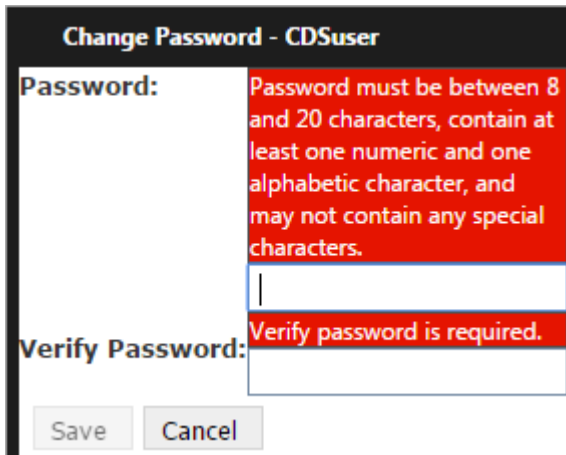
**Save** **Cancel**

4. Click the **Save** button.

## Reset a user password

1. In the **Edit User** pop-up, click the **Change Password** button.
2. Enter the password, making sure that it adheres to the password rules.

The password must be between 8 and 20 characters, and it must contain at least one upper-case letter, one lower-case letter and one number. It cannot contain repeat characters or the word "password".



3. Click the **Save** button. This button is only enabled if you enter a password that adheres to the rules.

## Enable or disable a user

In the **Edit User** pop-up, check or uncheck the **Enabled** check box.

## Delete a user

In the **Edit User** pop-up, click **Remove**.

# User privileges

The **User Privileges** option on the **Administration** menu provides a report of all users and the roles assigned to each user. The following example shows some of the information included in the report (not all report columns are displayed here).

Select a Group: <input type="text" value="UB Direct"/> <input type="checkbox"/> Show Disabled Users						
Download Report						
Group Name	User Name	Login ID	Disabled	Admin	ArchiveUser	Report
<b>UB Direct</b>						
UB Direct	val 1	validation1	N	N	Y	N
UB Direct	eg sso	egsso_ub	N	N	Y	N
UB Direct	test ie11	testie11	N	N	Y	N
UB Direct	reset 1234	reset1234	N	N	Y	N
UB Direct	Tim Tester	Ttest	N	N	Y	N
<b>MARK IV CAPITAL INC</b>						
MARK IV CAPITAL INC	TIS Test2	TISTest2	N	N	Y	N
MARK IV CAPITAL INC	QA Test	QAtest	N	Y	Y	Y

# Group management

The **Group Management** option on the **Administration** menu enables you to manage user groups, fields, and broadcast messages.

## Group Administration

In the **Group Administration** tab, you can view, add and disable groups, restrict group access, and determine the level of security associated with the group.

The group hierarchy is displayed in a tree on the left side of the screen. The group currently being worked on is highlighted in gray. Any actions taken are applied to the highlighted group and all groups below it.

Group Administration | Field Administration | Broadcast Administration

### Organization Management

**Add Group**

- [-] UB Direct
  - [-] MARK IV CAPITAL INC
  - [-] 311 S WACKER BUILDING LLC
  - [-] ACCESS PLUS PAGING INC
  - [-] Advanced Financial
  - [-] ALAMEDA COUNTY TAX COLLECTOR
  - [-] Anesthesia Medical Group
  - [-] ASCEND CLINICAL
  - [-] BAKERSFIELD
  - [-] Berkley Cardiovascular Medical
  - [-] CALIFORNIA EMERGENCY PHYSICIAN
  - [-] California Teachers Association
  - [-] CALIFORNIA TEACHERS ASSOCIATION
  - [-] City of Hope
  - [-] City of pleasantion
  - [-] CUSHMAN AND WAKEFIELD LA
  - [-] CUSHMAN AND WAKEFIELD SFLA
  - [-] Duvera Financial
  - [-] Dyntek Services Inc
  - [-] FUJI ELECTRIC CORP OF AMERICA
  - [-] Fujitsu Ten Corp of America

**Group Details (Editing)**

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.**

## Add a subgroup

1. Click on the group to which the new subgroup will belong (in this example, **Globalstar USA**), then click **Add Group**.

Group Administration | Field Administration

### Organization Management

**Add Group**

- [-] Globalstar USA
  - [-] 30519

2. In the **Group Details** area, enter the subgroups details, then click **Save**.

**Group Details (Adding)**

Name:

Code:

Category:

Description:

Enabled:

Restrict Access:

**Note:** Make sure you check the **Enabled** check box, otherwise users will not be able to access the subgroup.

## Multi-Factor Authentication

MFA is an optional security method to control access by requiring users to successfully pass several separate authentication stages. MFA does not apply to groups that use SSO (single sign-on) authentication.

iRemit offers two different kinds of authentication:

- **Challenge response questions:** New users select three questions and answers from a list. During the login process, they are prompted to answer one of these questions.
- **One time passwords (OTP):** New users receive a password via email, which they enter during login. After a user has entered the one time password, the information is stored in a user cookie and is used for all future logins, except when cookies are reset, or for shared desktop computers.

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.

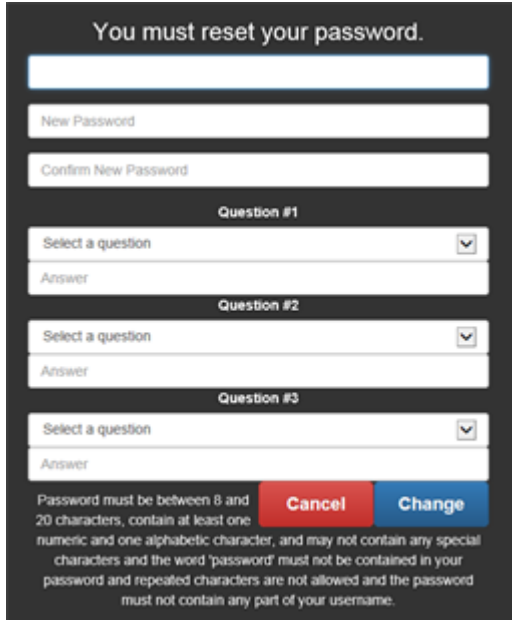
- Enable Multi-factor Authentication (MFA)**
- Enable One Time Passwords**
- Allow cookie for MFA**
- Force MFA onto sub-groups.**

**Enable Stop File Administration.**

Save



In the following example, users are required to select challenge response questions when they first log in with a temporary password.



The screenshot shows a dark-themed form titled "You must reset your password." It contains the following fields and elements:

- An empty text input field at the top.
- A "New Password" text input field.
- A "Confirm New Password" text input field.
- Three challenge question sections, each labeled "Question #1", "Question #2", and "Question #3". Each section includes a dropdown menu labeled "Select a question" and a text input field labeled "Answer".
- At the bottom, there is a text block with password requirements: "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." To the right of this text are two buttons: a red "Cancel" button and a blue "Change" button.

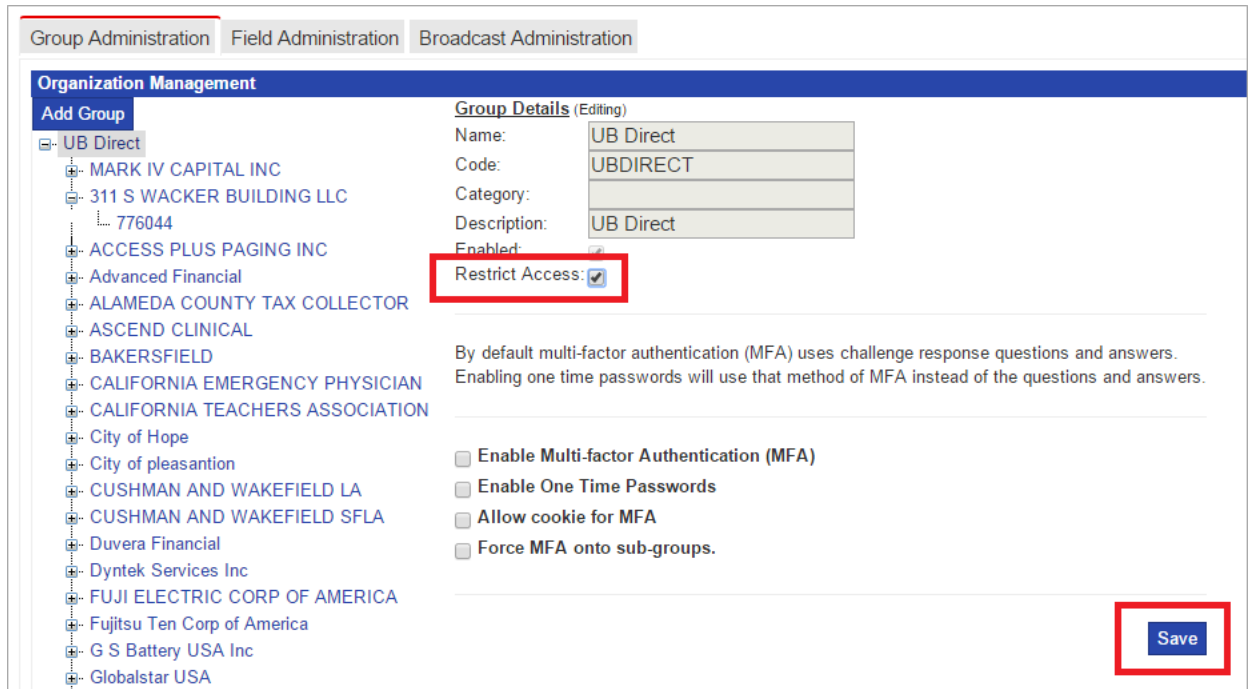
## Enable Stop File Administration

Check this check box to enable the use of stop files for the group's Exception Decisioning.

## Restrict Access

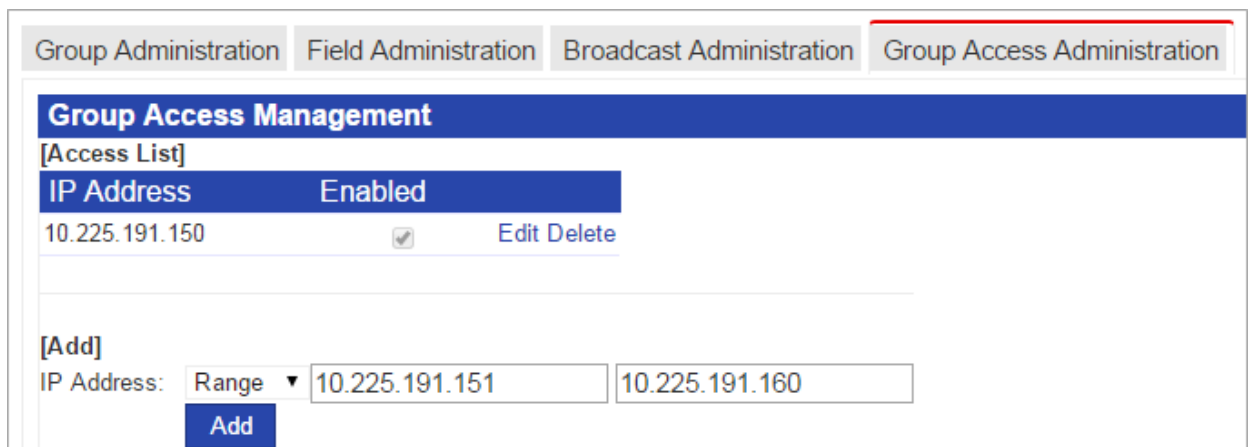
iRemit is a secured application. You can restrict access to the application by adding individual IPs or a range of IP addresses.

1. Check the **Restrict Access** check box, then click **Save**.



The screenshot shows the 'Group Administration' tab selected. Under 'Organization Management', the 'UB Direct' group is expanded. In the 'Group Details (Editing)' section, the 'Restrict Access' checkbox is checked and highlighted with a red box. A 'Save' button is also highlighted with a red box in the bottom right corner.

2. In the **Group Access Administration** tab, in the **IP Address** selection list, select **Single** or **Range**.
3. Enter the IP address. To enter a range, enter the first address in the first box, and the last address in the second box.
4. Click the **Add** button to enter further IP addresses.



The screenshot shows the 'Group Access Administration' tab selected. Under 'Group Access Management', the '[Access List]' section shows a table with one entry: IP Address 10.225.191.150, Enabled (checked), and Edit Delete buttons. Below this, the '[Add]' section has a dropdown menu set to 'Range', two input boxes containing '10.225.191.151' and '10.225.191.160', and an 'Add' button.

## Field Administration

In the **Field Administration** tab, you can customize the iRemit report fields. For example, you can add fields, change the field labels, and change the order of the fields.

The **Field Administration** tab lists all fields with their labels and attributes. To display only fields for a specific module, select the module in the **Module** selection list.

To add a field, click the **Add More Fields ...** link at the bottom of the list.

To edit a field, click **Edit** next to the field.

Field Management								
Module: Long Term Archive								
Type	Field	Label	Display on Search	Require on Search	Display on Results	Display Order	Editable	
<a href="#">Edit</a>	Checks	Item Type	Item Type	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	AccountNumber	Account#	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	Amount	Applied Amount	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	CheckNum	CHECKNUMBER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	11	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	CheckRTNum	R / T	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	SequenceNum	Seq#	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Checks	Other1	REMITTERNAME	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	LockBoxSummary	Amount	Running Totals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>
		BatchNumber		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Stubs		TYPE	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Stubs	Amount1	INVOICEAMOUNT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	ProcessDate	Process Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	StatementCode	Lockbox Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	SubSiteID	ClientID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	TranNumber	Tran #	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	BatchMode	Doc Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	BankID	Batch ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Trans	TransAmount	Trans Amount	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input checked="" type="checkbox"/>

[Add More Fields ...](#)

Enter the details in the **Field Management** window. This window has three sections, which are described below.

Group Administration **Field Administration** Broadcast Administration

**Field Management**

Module: Long Term Archive

Fields **Details**

[Checks.ItemType]

**1**

**Appearance**

Field Label: Item Type

Description:

Display on Search:

Require on Search:

Display on Results:

Display Order: 4

Editable:

Default Value:

**Update Field**

**2**

**Filters**

[Filter List]

No filters. **Add**

**3**

**Valid Values**

[Valid Values]

Value	Display Value
None	None

**Insert**

## Appearance

To change how the fields are displayed on the search and results screens, change the settings in the **Appearance** area, then click the **Update Field** button

Field	Description
Field Label	The name of the field that is displayed in the interface.
Field Description	(Optional) A description of the field.

Field	Description
Display on Search	Check this check box if the field should be available for searching, but is not required in order to perform a search.
Require on Search	Check this check box if the field is required in order to perform a search.
Display on Results	Check this check box to display the field in the search results.
Display Order	Enter a number to specify where the field is displayed on the screen.
Editable	Check this box if the field can be edited.
Default Value	Enter a value. This value is automatically entered in the field.

## Filters

You can limit the display of items by adding a filter to the field.

1. Click the **Add** button.

The **Filter Builder** is displayed on the right side of the screen.

2. Select an operator, then enter the values for the filter and click **Save**.

**Filters**

[Filter List]

No filters.

[Filter Builder]

Operator: Equals ▼





















Value From: 1

Value To: 1

**Save**

**Add**

In this example, the **Client ID** field has been set to a filter value of **1**. Only data for **Client ID 1** is displayed in the search results screen.

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

In the **Field Administration** tab, fields with a filter set are displayed in bold text.

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

## Valid Values

You can create a list of valid values for a field, so that users can select the values from a selection list instead of entering them manually.

To add a value, click **Insert** in the **Valid Values** area, then enter the **Value** and the **Display Value**.

<b>Valid Values</b>	
[Valid Values]	
Value	Display Value
Delete 123456	123456
Delete 654321	654321
Delete 777777	777777
Insert	<input type="text"/> <input type="text"/>

A selection box is now displayed for the field instead of an input box.

Check Level	
Item Type:	Equals <span>▼</span> <span>Select</span> <span>▼</span>
CHECKNUMBER:	Equals <span>▼</span> <span>Select</span>
Sequence:	Equals <span>▼</span> 123456
sample acct:	Equals <span>▼</span> 654321
	777777

## Broadcast Administration

In the **Broadcast Administration** tab, you can create and manage messages for various groups of users, which will be displayed on the home page of the application.

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

1. Click the **Create Message** button.
2. Enter the **Message Text**.
3. Enter the **Start Date/Time** and **End Date/Time** to determine when the message will be displayed.

Group Administration	Field Administration	Broadcast Administration
<b>Broadcast Message Management</b>		
Messages <span>Edit Message</span>		
Message Text:	Text of the message to be displayed in the Broadcast Message is entered here.	
Start Date/Time:	110115	12:00
	Date Format: mmddyy	Time Format: hh:mm (24hr)
End Date/Time:	113015	24:00
	Date Format: mmddyy	Time Format: hh:mm (24hr)
Organization:	UB Direct <span>▼</span>	
Active:	<input checked="" type="checkbox"/>	
Include Child Groups:	<input checked="" type="checkbox"/>	
	<span>Save</span>	<span>Exit</span>

4. Select the **Organization** whose users should see the message. Check the **Include Child Groups** to include subgroups of the organization.

5. Check the **Active** check box.
6. Click **Save**.

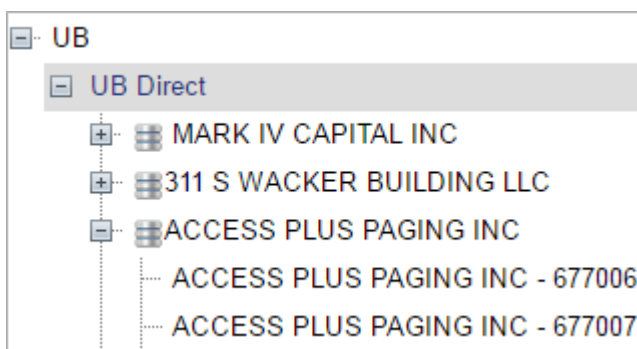
To reactivate an expired message, click **Edit** next to the message and change the dates and times.

Broadcast Message Management							
Messages							
Create Message							
	Organization	Message	Start Time	End Time	Msg Creator	Enabled	Include Child Groups
<b>Edit</b>	Globalstar USA	Important information may be shared here with user...	5/8/2015 2:15 PM	5/8/2015 2:30 PM	...	<input type="checkbox"/>	<input type="checkbox"/>

## Auditing

The **Auditing** option on the **Administration** menu allows you to view detailed user reporting, transaction changes, and file import details.

You can view audit information for all group levels below the group to which you are assigned. For instance, in the example below, an administrator assigned to the group **ACCESS PLUS PAGING INC** can view the audit information for all Access Plus Paging lock boxes. Only an administrator assigned to the **UB** or the **UB Direct** group can view the top level of the Access Plus Paging audit information.



## Admin Report

The **Admin Report** allows you to view the activities of users in the application. Two report types are available: **Administrative** and **Authentication**. Both reports can be generated for all users or an individual user.



## Administrative

**Admin Report**

**Group:** UB Direct

**Date:** 100116 to 102116

**User:** (All)

**Report Type:**  **Administrative**  **Authentication**

Search

User	Activity Time	Task
jaybailon	10/4/2016 11:32:55 AM	Updated user 'Ed Gutierrez', Enabled: From 'True' To 'False', Modified Access:
George	10/4/2016 11:34:47 AM	Updated user 'Manuel Cortez', Modified Access: Added CDM Admin access to UB Direct, Sweep Admin access to UB Direct
George	10/4/2016 11:35:20 AM	Updated user 'Victor Escobedo', Modified Access: Added Sweep Admin access to UB Direct
George	10/4/2016 11:35:51 AM	Updated user 'Leo Gregonia', Modified Access: Added CDM Admin access to UB Direct, Sweep Admin access to UB Direct
jaybailon	10/4/2016 1:45:34 PM	Updated user 'Manuel Cortez', Enabled: From 'False' To 'True', Modified Access:
jaybailon	10/4/2016 1:46:05 PM	Updated user 'Manuel Cortez', Modified Access:  , Password Changed.
jaybailon	10/4/2016 1:48:10 PM	Updated user 'Manuel Cortez', Enabled: From 'False' To 'True', Modified Access:  , Password Changed.
George	10/17/2016 5:19:44 PM	Updated user 'Manuel Cortez', Enabled: From 'False' To 'True', Modified Access: Added Download CSV access to UB Direct, IDX_Admin access to UB Direct, IDX_Download access to UB Direct, Stop File Admin access to UB Direct   Removed Exception3 User access to

## Authentication

**Admin Report**

**Group:** UB Direct ▼  
**Date:** 100116 to 102116  
**User:** Dam, Anne [annedam] ▼  
**Report Type:**  Administrative  Authentication

User	Activity Time	Task
annedam	10/3/2016 12:48:28 PM	LMS: User annedam Logging in. (ip) 216.52.215.232
annedam	10/3/2016 12:48:28 PM	Logged In.
annedam	10/3/2016 1:56:16 PM	LMS: User annedam Logging in. (ip) 216.52.215.232
annedam	10/3/2016 1:56:16 PM	Logged In.
annedam	10/4/2016 12:52:06 PM	LMS: User annedam Logging in. (ip) 216.52.215.232
annedam	10/4/2016 12:52:06 PM	Logged In.

## History Audit Report

The **History Audit Report** allows you to view anything a **History** user has done, including searches and images they have viewed. The report can be generated for searches or images viewed by all users or an individual user. You can download the report results to a CSV file and save the file on a local drive.

### Searches by users

**History Audit Report**

Client: Globalstar USA

Date: 090115 to 090215

User: (All)

Report Type:  Search  Image

[Search](#)

---

[Download](#)

User	Activity Time	Search Criteria
demouser123	9/1/2015 3:29:00 PM	Process Date LessThan 20150902 AND 20150902]
demouser123	9/1/2015 3:29:00 PM	Viewed: 25667662C,25667663C,25667664C,25667665C,31663740
demouser123	9/2/2015 3:09:00 PM	Process Date Equals 013015
demouser123	9/2/2015 3:10:00 PM	Process Date Equals 013015
demouser123	9/2/2015 3:13:00 PM	Lockbox drill-down search, ((Trans.ID = 51276955))
demouser123	9/2/2015 3:13:00 PM	Viewed: 31663740S,31663741S,25682119C
demouser123	9/2/2015 3:14:00 PM	Exported to CSV: 31663740S,31663741S,25682119C

### Images viewed by user

**History Audit Report**

Client: Globalstar USA

Date: 090115 to 090215

User: User, Demo [demouser123]

Report Type:  Search  Image

[Search](#)

---

[Download](#)

User	Activity Time	Process Date	Transaction ID	Batch Num	TranNumber	Site ID
demouser123	9/2/2015 3:12:13 PM	20150130	51276955	15645	1	1102
demouser123	9/2/2015 3:17:58 PM	20150130	51276955	15645	1	1102

## Exception Decisioning Audit Report

The **Exception Decisioning Audit Report** allows you to view the activities of users in the **Exception Decisioning** module, including the images they have viewed. The report can be generated for all users or an individual user. You can download the report results to a CSV file and save the file on a local drive.

Exception Decisioning Audit Report

**Groups** Globalstar USA

**Ref ID**

**From Date** 090215 **To** 092316 date format: mmddyy

**Log Type** (all)

**User Name** (All)

**Report Type:**  Activity  Image

Activity Time	Group Name	User ID	Task	Key
9/2/2015 1:11:38 PM	Globalstar USA	Kathy	CDMAActivityReport: Org Code: 3GLOBALST   Org ID: 1692   Search Type: Detail   User ID: 1474   Search Criteria - FromDate: 9/2/2015 12:00:00 AM   ToDate: 9/2/2015 11:59:24 PM	Tran 0
9/2/2015 1:11:51 PM	Globalstar USA	Kathy	CDMAActivityReport: Org Code: 3GLOBALST   Org ID: 1692   Search Type: Detail   User ID: 1474   Search Criteria - FromDate: 9/2/2015 12:00:00 AM   ToDate: 9/2/2015 11:59:24 PM	Tran 0
9/2/2015 4:36:16 PM	Globalstar USA	demouser123	SiteID: 1102, ClientID: 30519, Batch ID: 3, TransID 120432 status changed from NoDecision to Accepted	Tran 120432
9/2/2015 4:39:08 PM	Globalstar USA	demouser123	Update Stub : Invoice #: "" to "786543" (SiteID: 1102, ClientID: 30519, Batch ID: 1, TransID: 120433, SequenceNum: 4, Stub_ID: 248785)	Tran 120433

## Load Report

The **Load Report** allows you to view at group level 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 of files imported and a **Detail** view of actual files are available. You can download the report results to a CSV file and save the file on a local drive.

## Summary

**Load Report**

Client:  SiteID:

Date:  to

Report Type:  Summary  Detail

---

**Download**

Process Date	Item Count	Page Count
20141214	4	8
20150130	32	36
20150420	17	34
20150422	16	32
20150821	6	12
20151020	6	12

## Detail

**Load Report**

Client:  SiteID:

Date:  to

Report Type:  Summary  Detail

---

**Download**

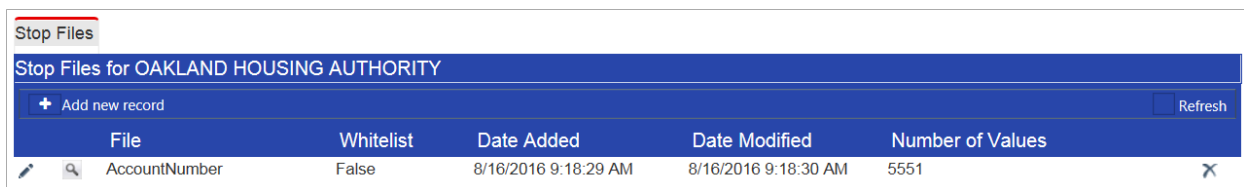
FileName	Load Date	Process Date	Item Count	Page Count	Date Removed	Error Code	Site ID
30519_20150130_15645.zip	2/28/2015 2:12:00 PM	20150130	0	1	20150826	102	1102
30519_20150130_15645.zip	2/28/2015 2:19:00 PM	20150130	0	1	20150826	102	1102
30519_20150130_15645.zip	3/2/2015 9:56:00 AM	20150130	0	1	20150826	102	1102
30519_20150130_15645.zip	3/2/2015 9:58:00 AM	20150130	0	1	20150826	10	1102
30519_20150130_15645.zip	3/2/2015 11:50:00 AM	20150130	8	8	20150826	0	1102
colortest.zip	5/1/2015 9:00:00 AM	20141214	4	8	20150908	0	1102
LTA_WHOL_1102_00030519_20150707230954_B_25855.0003	7/22/2015 3:25:00 PM	20150420	5	10	20150828	0	1102
LTA_WHOL_1102_00030519_20150716183710_B_25710.0003	7/22/2015 3:25:00 PM	20150422	5	10	20150828	0	1102

# Optional administration modules

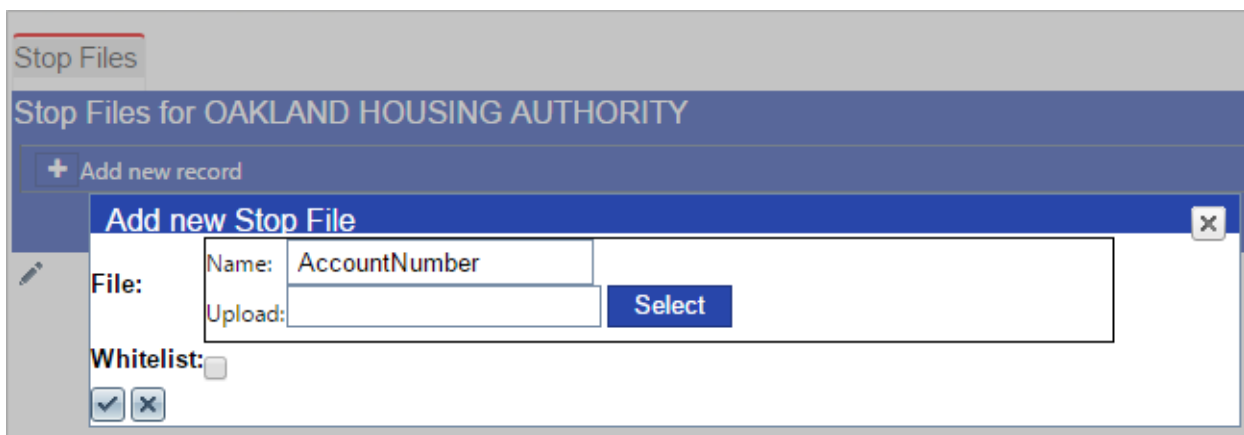
iRemit offers several optional administrative modules, which are only viewable if they are enabled.

## Stop File Management

Stop files are an Exception Decisioning tool. Clients can upload a stop file and specify whether or not it is a whitelist. A validation can be added for an exception field to validate against the list.



Stop Files for OAKLAND HOUSING AUTHORITY					
File	Whitelist	Date Added	Date Modified	Number of Values	
AccountNumber	False	8/16/2016 9:18:29 AM	8/16/2016 9:18:30 AM	5551	



**Add new Stop File**

File: Name: AccountNumber

Upload:

Whitelist:

See the *iRemit User Guide* for detailed information on Exception Decisioning.

## Exception Decisioning Sweep Management

A sweep pulls transactions from the Exception Decisioning queue for processing. Mini-sweeps can be run multiple times per day. Mini-sweeps only pull batches that have been fully decided. Partially decided batches remain in the queue until the final sweep of the day.

See the *iRemit Image Archive User Guide* for detailed information on Exception Decisioning.

The **Sweep Events** tab displays scheduled sweeps by lock box.

Sweep Events

Sweeps for OAKLAND HOUSING AUTHORITY

	ID	SiteID	SubsiteID	BankID	CID	Interval	RunTime	Status
<a href="#">Edit</a>	85350	1102	45658	0	0	Daily	09/29/2016 17:00	Scheduled
<a href="#">Edit</a>	85353	1102	4565801	0	0	Daily	09/29/2016 17:00	Scheduled
<a href="#">Edit</a>	85354	1102	4575901	0	0	Daily	09/29/2016 17:00	Scheduled
<a href="#">Edit</a>	85355	1102	45759	0	0	Daily	09/29/2016 17:00	Scheduled

[Create](#)

To add a sweep, click the **Create** button.

To edit a sweep, or add a mini-sweep, click the **Edit** button next to the sweep.

Mini-sweeps can be scheduled at different intervals on the **Sweep Details** tab. Mini-sweeps only pull those batches from the queue that have been fully decided.

Sweep Events **Sweep Details**

Sweep Event Details

Site/SubSite ID 1102 - 4565801  Bank ID 0

CID 0  First Run Date 09/29/2016

Sweep Time 17  : 00  Auto Schedule

Interval Daily

[Save](#) [Add Mini-Sweep](#)

[Mini Sweep Times](#)

# IDX Administration

Users with the **IDX Admin** role can create templates and schedule jobs. See the *IDX Administration User Guide* for more information.

## TIS Image Data Exchange

Jobs Definition & Schedule Site for Organization 1749

TEMPLATES

[Manage Templates](#)

JOBS

[Create new Job](#)

[Active Jobs](#)

[Inactive Jobs](#)

EXPORTS

[Download](#)

LOGS

[Today's Log](#)

### Welcome to eIDX!!!

#### Active Jobs

No Active Jobs

#### Inactive Jobs

No Inactive Jobs

#### Templates

+ New template

ID	Name	Description	Modified By	Last Modified
----	------	-------------	-------------	---------------

Project Build Date:  
9/20/2016 9:37:28 AM