



BND DIRECT
Administraion
Guide

SEPTEMBER 2023



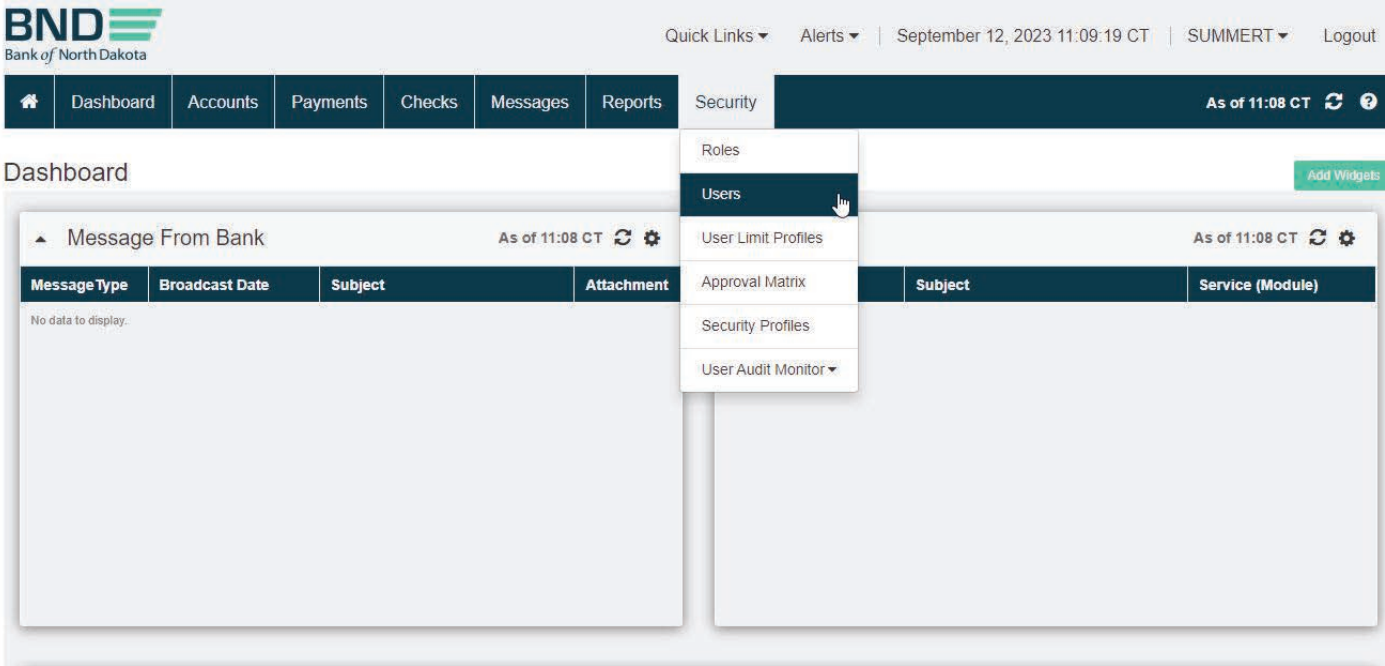
Table of Contents

Adding A User	3
Admin Adding a User	3
Second Admin User Approval	5
Modifying A User	6
Admin Modifying a User	6
Second Admin Modifying User Verification	7
Suspending A User	8
Admin Suspending a User	8
Second Admin Suspending User Verification	9
Resetting A Password	10
Resetting Password	10
Resetting Password Approval	11
Audit Logs	12
Audit	12
Audit Filters	12
Audit Activity	13
Audit Report	14

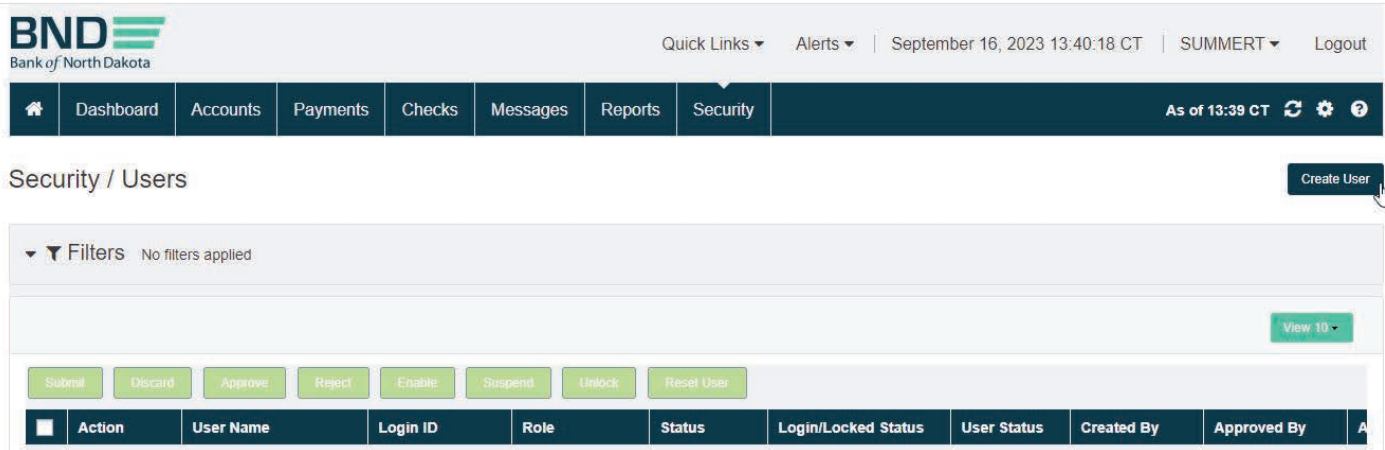
Adding A User

Admin Adding a User

- 1. **Security.**
- 2. Click **Users.**



- 3. Click **Create User.**



4. Fill in **User Details**.
5. Check mark "**Copy from Existing User.**"
6. Within the box below put **% sign**. This will bring up the existing users to choose from. Using this feature will simplify this process and bring permissions and roles over.
7. Complete all mandatory fields.
8. Click **Next**.
9. Verify the summary screen and click **Save** and **Verify**.
10. **Submit**.

Quick Links ▾
Alerts ▾
September 12, 2023 11:16:03 CT
SUMMERT ▾
Logout

Dashboard
Accounts
Payments
Checks
Messages
Reports
Security

?

Create User

1. Create User
»
2. Permissions
»
3. Verify User

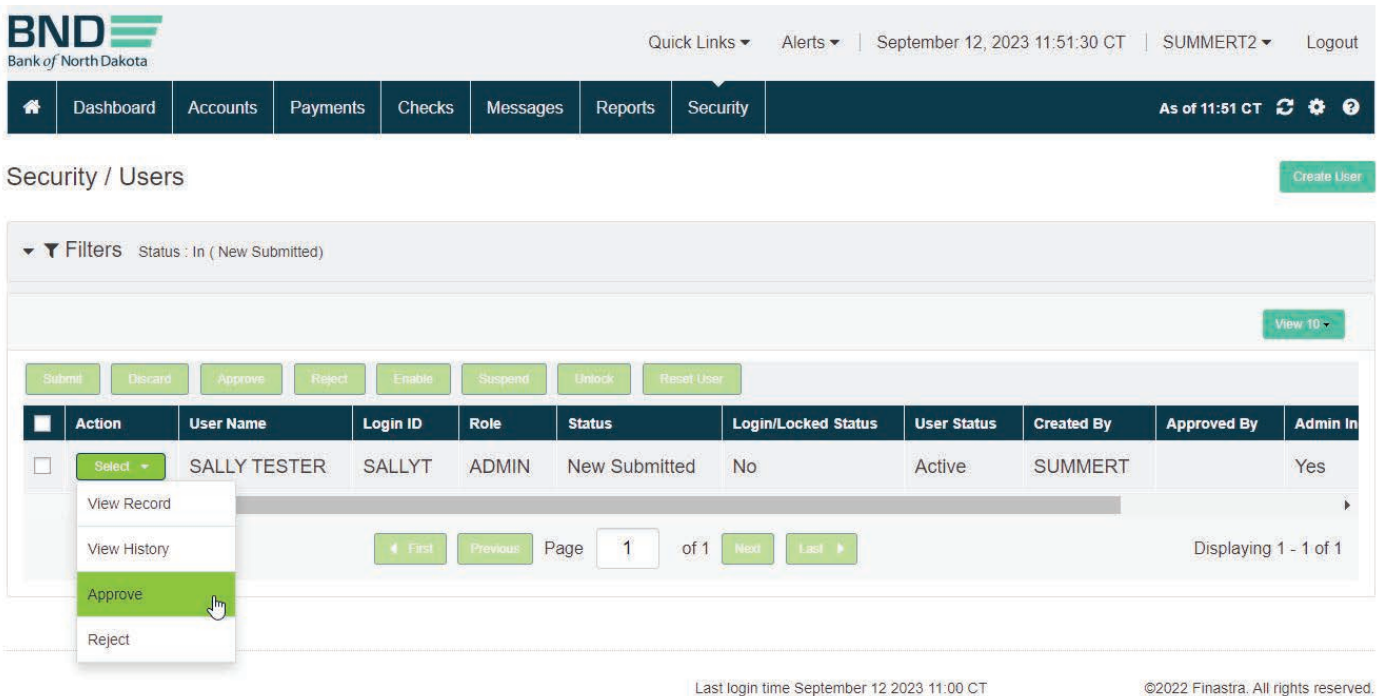
User Details

<p>First Name*</p> <input type="text" value="SALLY"/>	<p>Last Name*</p> <input type="text" value="TESTER"/>	<p><input checked="" type="checkbox"/> Copy From Existing User</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">SUMMERT2 SUMMER TEST2</div>
<p>Login ID*</p> <input type="text" value="SALLYT"/>	<p>Role*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">TESTROLE TEST ROLE ▾</div> <p style="font-size: 8px; margin-top: 5px;">View Role Details</p>	<p>Activation Date*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">09/12/2023 </div>
<p>Department</p> <input type="text"/>	<p>Telephone</p> <input type="text"/>	<p>State</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">North Dakota ▾</div>
<p>Address*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">1200 Memorial Hwy</div>	<p>Country*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">United States of America ▾</div>	<p>Zip Code*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">58504</div>
<p>Fax</p> <input type="text"/>	<p>City</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">Bismarck</div>	<p>Language</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">English (United States) ▾</div>
<p>Email*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">sally@email.com</div>	<p>Mobile Number*</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">7015551111</div>	

▲ Features

Second Admin User Approval

1. The status will be **New Submitted** and will need to be verified by a second Admin User.
2. **Security** tab.
3. Choose **Users**.
4. **View Record** under **Action**, this will bring a summary of permission up.
5. Verify all permissions are correct.
6. **Close**.
7. **Approve** under **Action**.
8. The Status will change to Approved.
9. Once approved the user will receive 2 emails, one with the **user ID** and the second will be the **first-time password**.
10. Notify BND to update the token or to send a new token to the user.
Email **bndelectronic@nd.gov** or call 701-328-5644.



BND
Bank of North Dakota

Quick Links ▾ Alerts ▾ | September 12, 2023 11:51:30 CT | SUMMERT2 ▾ Logout

Dashboard Accounts Payments Checks Messages Reports Security As of 11:51 CT

Security / Users Create User

Filters Status : In (New Submitted) View 10

Submit Discard Approve Reject Enable Suspend Unlock Reset User

Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approved By	Admin In
Select ▾ View Record View History Approve Reject	SALLY TESTER	SALLYT	ADMIN	New Submitted	No	Active	SUMMERT		Yes

Page 1 of 1 First Previous Next Last Displaying 1 - 1 of 1

Last login time September 12, 2023 11:00 CT ©2022 Finastra. All rights reserved.

Modifying A User

Admin Modifying a User

1. **Security.**
2. Click **Users.**

The screenshot shows the BND Bank of North Dakota admin interface. The top navigation bar includes the BND logo, "Bank of North Dakota", and user information: "Quick Links", "Alerts", "September 16, 2023 14:28:59 CT", "SUMMERT", and "Logout". Below this is a secondary navigation bar with tabs for "Dashboard", "Accounts", "Payments", "Checks", "Messages", "Reports", and "Security". The "Security" tab is active, and a dropdown menu is open, showing options: "Roles", "Users", "User Limit Profiles", "Approval Matrix", "Security Profiles", and "User Audit Monitor". The "Users" option is highlighted with a mouse cursor. Below the navigation is a "Dashboard" section with a "Message From Bank" widget and an "Add Widgets" button.

3. Choose **Modify Record** under **Action.**
4. Update details.
5. Click **Next.**
6. Click **Save** and **Verify.**
7. Click **Submit.**

The screenshot shows the BND Bank of North Dakota admin interface for the "Security / Users" page. The top navigation bar includes the BND logo, "Bank of North Dakota", and user information: "Quick Links", "Alerts", "September 16, 2023 14:30:37 CT", "SUMMERT", and "Logout". Below this is a secondary navigation bar with tabs for "Dashboard", "Accounts", "Payments", "Checks", "Messages", "Reports", and "Security". The "Security" tab is active, and the "Users" sub-tab is selected. The page title is "Security / Users" and there is a "Create User" button. Below the navigation is a "Filters" section with "No filters applied". A table of users is displayed with columns: "Action", "User Name", "Login ID", "Role", "Status", "Login/Locked Status", "User Status", "Created By", and "Approved By". The table contains three rows of user data. The "Action" column for the second row is expanded, showing options: "Select", "Modify Record", "View Record", "View History", and "Suspend". The "Modify Record" option is highlighted with a mouse cursor. Below the table is a pagination bar with "First", "Previous", "Page 1 of 1", "Next", and "Last" buttons. The text "Displaying 1 - 3 of 3" is shown at the bottom right.

Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approved By
<input type="checkbox"/>	SALLY TESTER	SALLYT	ADMIN	Approved	No	Active	SUMMERT	SUMMERT2
<input type="checkbox"/>	MER TEST2	SUMMERT2	TESTROLE	Approved	No	Active	SALLYT	SALLYT
<input type="checkbox"/>	MER TEST	SUMMERT	TESTROLE	Approved	Yes	Active	SALLYT	SALLYT

Second Admin Modifying User Verification

1. The status will be **Modified Submitted** and will need to be verified by a second Admin User.
2. **Security** tab.
3. Choose **Users**.
4. View **Record** under **Action**, this will bring a summary of permission up.
5. Verify the modified permissions are correct.
6. **Close**.
7. **Approve** under **Action**.
8. The **Status** will change to **Approved**.

Bank of North Dakota

Quick Links | Alerts | September 16, 2023 14:35:52 CT | SUMMERT2 | Logout

Dashboard | Accounts | Payments | Checks | Messages | Reports | Security | As of 14:35 CT

Security / Users [Create User](#)

Filters No filters applied [View 10](#)

Submit Discard Approve Reject Enable Suspend Unlock Reset User

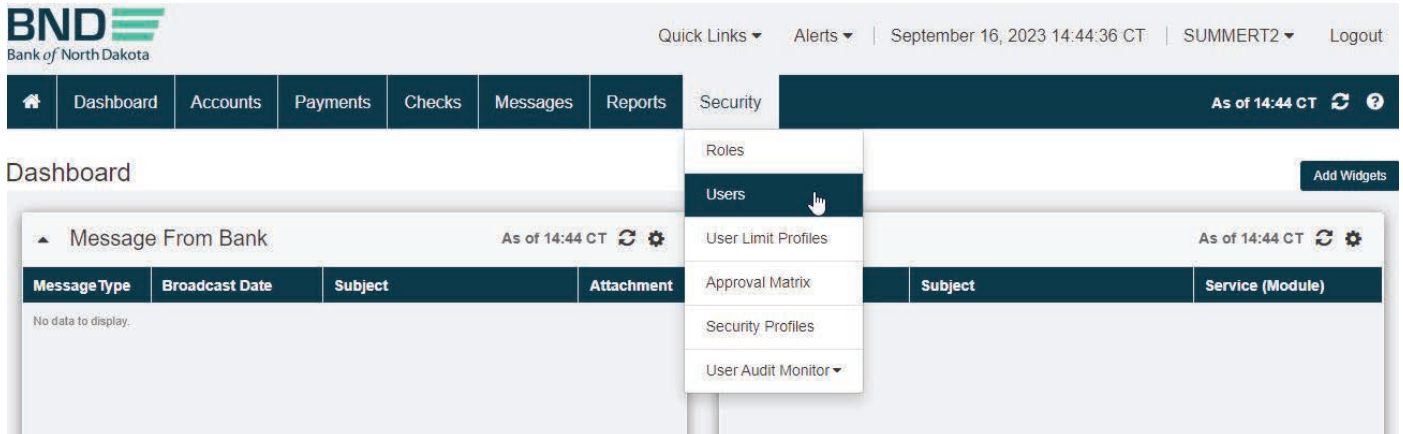
Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approved
<input type="checkbox"/> Select View Record View History Approve Reject	SALLY TESTER	SALLYT	ADMIN	Modified Submitted	No	Active	SALLYT	SUMME
<input type="checkbox"/>	...MER TEST2	SUMMERT2	TESTROLE	Approved	Yes	Active	SALLYT	SALLYT
<input type="checkbox"/>	...MER TEST	SUMMERT	TESTROLE	Approved	No	Active	SALLYT	SALLYT

Page 1 of 1 [First](#) [Previous](#) [Next](#) [Last](#) Displaying 1 - 3 of 3

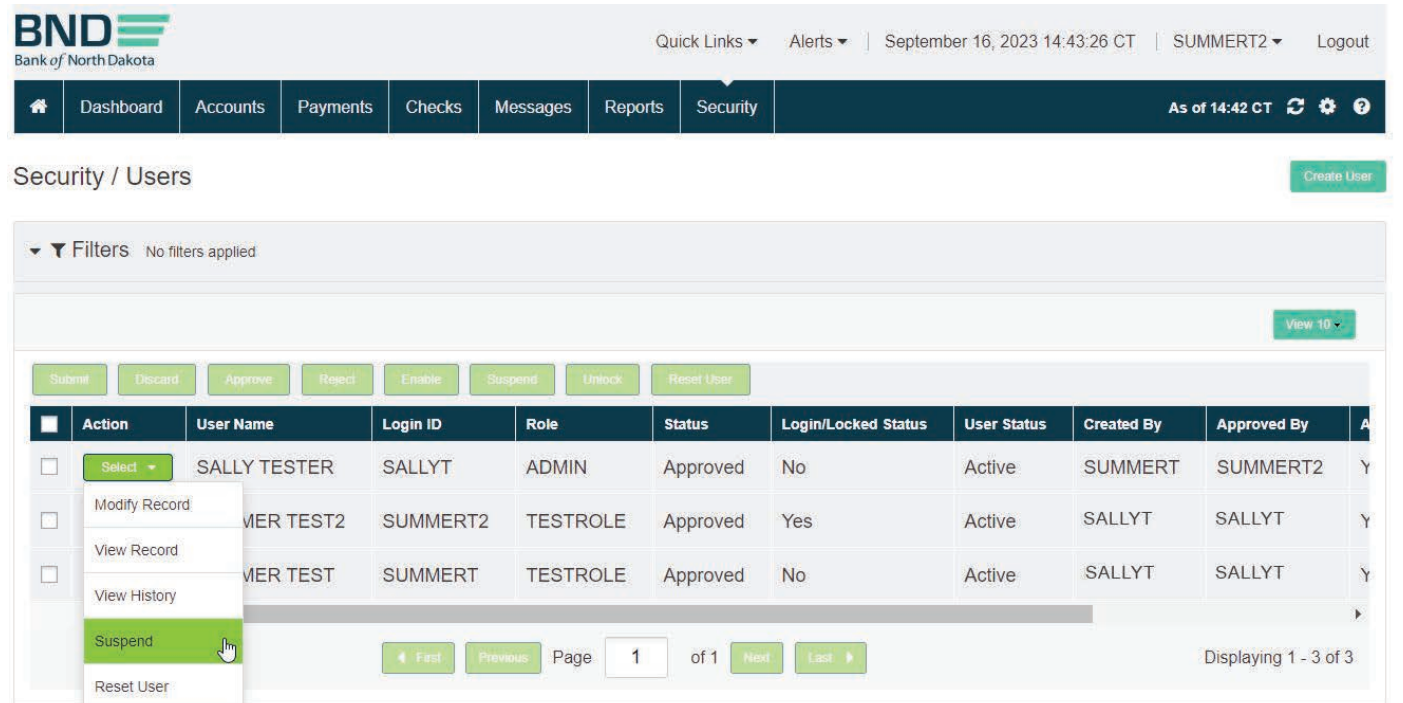
Suspending A User

Admin Suspending a User

1. **Security.**
2. Click **Users.**



3. Choose **Suspend** under **Action.**
4. Status will change to **Suspend Request.**
5. Another Admin user will need to approve.



Second Admin Suspending User Verification

1. **Security** tab.
2. Choose **Users**.
3. Select **Approve** under the **Action** of the user being suspended.
4. **Status** will change to **Suspended**.
5. The suspended users will not be purged off in this system but do not have any access.

Bank of North Dakota

Quick Links Alerts | September 16, 2023 14:47:50 CT | SUMMERT2 Logout

Dashboard Accounts Payments Checks Messages Reports Security As of 14:46 CT

Security / Users [Create User](#)

Filters No filters applied [View 10](#)

Submit Discard Approve Reject Enable Suspend Unlock Reset User

	Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approved By
<input type="checkbox"/>	Select	SALLY TESTER	SALLYT	ADMIN	Suspended	No	Active	SUMMERT2	SALLYT
<input type="checkbox"/>	Select	SUMMER TEST2	SUMMERT2	TESTROLE	Approved	No	Active	SALLYT	SALLYT

Resetting A Password

Resetting Password

1. **Security**.
2. Click **Users**.
3. Locked user will be **Disabled**.
4. Under **Action** choose **Reset User**.
5. The above steps are also if user has forgotten their password.
6. **Status** will change to **Reset User Request** and need to be verified by another Admin User.

The screenshot shows the BND Bank of North Dakota user management interface. The top navigation bar includes the BND logo, a home icon, and menu items for Dashboard, Accounts, Payments, Checks, Messages, Reports, and Security. The current page is 'Security / Users'. A 'Create User' button is visible in the top right. Below the navigation is a 'Filters' section with 'No filters applied'. A 'View 10' dropdown is also present. The main content area features a table of users with columns for Action, User Name, Login ID, Role, Status, Login/Locked Status, User Status, Created By, and Approved By. The first user listed is SALLY TESTER (SALLYT, ADMIN, Approved, No, Disabled). A context menu is open over the first row, with 'Reset User' highlighted. Other menu items include Select, Modify Record, View Record, View History, and Suspend. At the bottom of the table, there are navigation buttons for 'Fast', 'Previous', 'Page 1 of 1', 'Next', and 'Last', along with a 'Displaying 1 - 3 of 3' indicator.

Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approved By	A
<input type="checkbox"/>	SALLY TESTER	SALLYT	ADMIN	Approved	No	Disabled	SALLYT	SALLYT	Y
<input type="checkbox"/>	...MER TEST2	SUMMERT2	TESTROLE	Approved	Yes	Active	SALLYT	SALLYT	Y
<input type="checkbox"/>	...MER TEST	SUMMERT	TESTROLE	Approved	No	Active	SALLYT	SALLYT	Y

Resetting Password Approval

1. **Security**.
2. Click **Users**.
3. Under **Action** choose **Approve** for the user that is being reset.
4. Status will change to **Approved** and **User Status** will be **Active**.
5. Once approved the user will receive 2 emails, one with the **user ID** and the second will be the **first-time password**.

The screenshot displays the BND Bank of North Dakota Security / Users interface. At the top, there is a navigation bar with the BND logo, quick links, alerts, the current date and time (September 16, 2023 15:01:20 CT), the user name (SUMMERT), and a logout button. Below this is a secondary navigation bar with menu items: Dashboard, Accounts, Payments, Checks, Messages, Reports, and Security. The Security menu is active, and the page title is "Security / Users".

The main content area shows a table of users with the following columns: Action, User Name, Login ID, Role, Status, Login/Locked Status, User Status, Created By, and Approv. A dropdown menu is open over the "Approve" button for the user "SALLY TESTER". The dropdown menu options are: Select, View Record, View History, Approve (highlighted), and Reject.

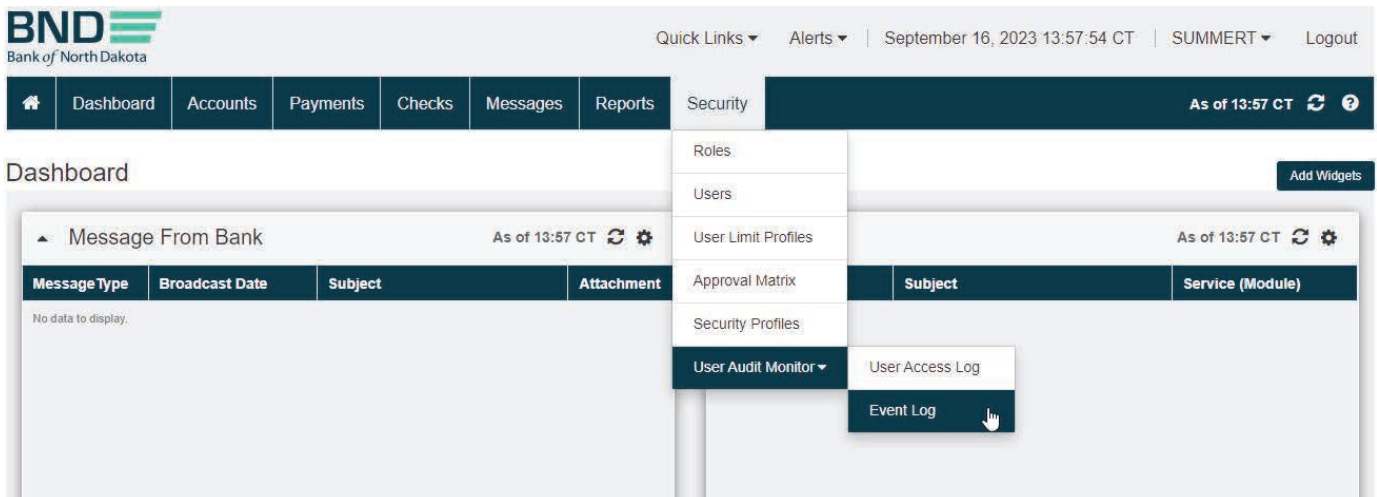
Action	User Name	Login ID	Role	Status	Login/Locked Status	User Status	Created By	Approv
<input type="checkbox"/>	SALLY TESTER	SALLYT	ADMIN	Reset User Request	No	Disabled	SUMMERT2	SUMM
<input type="checkbox"/>	SALLY TESTER	SUMMERT2	TESTROLE	Approved	No	Active	SALLYT	SALLY
<input type="checkbox"/>	SALLY TESTER	SUMMERT	TESTROLE	Approved	Yes	Active	SALLYT	SALLY

At the bottom of the table, there are navigation buttons: First, Previous, Page 1 of 1, Next, Last. The text "Displaying 1 - 3 of 3" is also visible.

Audit Logs

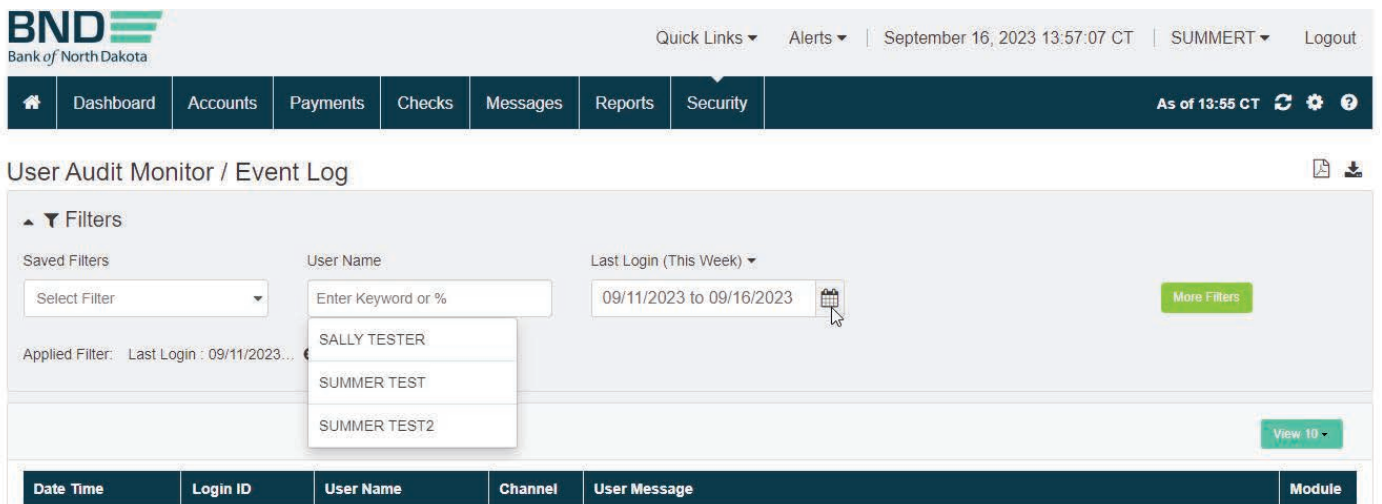
Audit

1. **Security.**
2. **User Audit Monitor.**
3. **Event Log.**




Audit Filters

1. **Type %** and it will populate the users to choose from.
2. Choose **date(s)**.



Audit Activity

The user activity will populate and can be saved as a PDF report or exported in XLS, CSV or TSV.



Quick Links ▾ | Alerts ▾ | September 16, 2023 15:14:41 CT | SUMMERT ▾ | Logout

Dashboard | Accounts | Payments | Checks | Messages | Reports | Security
As of 15:09 CT

User Audit Monitor / Event Log Repc

▼ Filters Last Login : 09/11/2023 - 09/16/2023 View 10 ▾

Date Time	Login ID	User Name	Channel	User Message	Module	Action
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Visited Event Log page	Admin	A
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	L
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Saved/Applied changes in settings on userMst	Admin	S
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Visited Users page	Admin	A
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	L
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Approved Users with User Name SALLY TESTER	Admin	A
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Reset Users Profile SALLYT	Admin	F
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Saved/Applied changes in settings on userMst	Admin	S
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	L
09/16/2023 1...	SUMMERT	SUMMER TEST	Web	User SUMMER TEST Visited Users page	Admin	A

Audit Report



Event Log Report

Report Date/Time: 09/16/2023 03:10:17 PM

Report Generated By Company Name	: SUMMER TEST : ND Test Bank	Financial Institution	: Bank of North Dakota
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Sn	User	Channel	User Message	Module	Action	Page
1	SUMMERT	Web	User SUMMER TEST Visited Event Log page	Admin	ACCESS_PAGE	User Audit Monitor
2	SUMMERT	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	LIST	Users
3	SUMMERT	Web	User SUMMER TEST Saved/Applied changes in settings on userMst	Admin	SAVE_PREF	Users
4	SUMMERT	Web	User SUMMER TEST Visited Users page	Admin	ACCESS_PAGE	Users
5	SUMMERT	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	LIST	Users
6	SUMMERT	Web	User SUMMER TEST Approved Users with User Name SALLY TESTER	Admin	APPROVE	Users
7	SUMMERT	Web	User SUMMER TEST Reset Users Profile SALLYT	Admin	RESET_USER	Users
8	SUMMERT	Web	User SUMMER TEST Saved/Applied changes in settings on userMst	Admin	SAVE_PREF	Users
9	SUMMERT	Web	User SUMMER TEST accessed/refreshed List of Users	Admin	LIST	Users
10	SUMMERT	Web	User SUMMER TEST Visited Users page	Admin	ACCESS_PAGE	Users
11	SUMMERT	Web	Client User SUMMER TEST logged in with CLIENTENTRY	Admin	LOGIN	
12	SUMMERT2	Web	User SUMMER TEST2 accessed/refreshed List of Users	Admin	LIST	Users
13	SUMMERT2	Web	User SUMMER TEST2 Saved/Applied changes in settings on userMst	Admin	SAVE_PREF	Users
14	SUMMERT2	Web	User SUMMER TEST2 Reset Users Profile SALLYT	Admin	RESET_USER	Users
15	SUMMERT2	Web	User SUMMER TEST2 Saved/Applied changes in settings on userMst	Admin	SAVE_PREF	Users
16	SUMMERT2	Web	User SUMMER TEST2 accessed/refreshed List of Users	Admin	LIST	Users
17	SUMMERT2	Web	User SUMMER TEST2 Visited Users page	Admin	ACCESS_PAGE	Users
18	SUMMERT2	Web	User SUMMER TEST2 accessed/refreshed List of Users	Admin	LIST	Users
19	SUMMERT2	Web	User SUMMER TEST2 Saved/Applied changes in settings on userMst	Admin	SAVE_PREF	Users

This is an unaudited report and is for informational purposes only



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Email: bndelectronic@nd.gov