

globalpayments

USER GUIDE

USER MANAGEMENT

VERSION 1.0



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1. USER MANAGEMENT

To access the User Management section, you will need to have the **'Administrator'** or **'User Manager'** role assigned to your User Login. These roles are explained in more detail in Section 1.2 of this guide.

The **'User Management'** section is located under **'Administration'** within the navigation menu.

The screenshot displays the 'USER MANAGEMENT' section of the 'globalpayments' application. The interface includes a search bar at the top with the text 'QUICK SEARCH: Choose Criteria' and 'Enter Keyword'. Below the search bar, there are tabs for 'Users', 'Pending Registration', and 'Archived'. A search input field is labeled 'Search for a User' and contains the text 'User name, email, Username'. There are 'CLEAR' and 'FIND USER' buttons. A 'Show' dropdown menu is set to 'All Users' with an option for 'Locked Users Only'. The main content area shows a grid of user profiles. Each profile includes a dropdown menu with the user's name, their name and email address, and their roles. The roles are displayed as green buttons with white text. Below the roles, there is a 'SEND RESET PASSWORD EMAIL' button. The sidebar on the left contains a 'MENU' section with options like 'DASHBOARD', 'TRANSACTIONS', 'CUSTOMERS', 'TERMINAL', 'FRAUD MANAGEMENT', 'SETTLED', 'REPORTS', 'QUICK LINKS', 'PENDING', 'DELAYED', 'HELD', 'VOIDED', 'FAILED', 'ADMINISTRATION', 'CLIENT SETTINGS', and 'USER MANAGEMENT'. The footer of the sidebar shows '© Global Payments 2018 v2.1.113 0-RELEASE'.

User Name	Email	Roles
admin	valid@Email.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST
fraudAnalyst	Jorge.desilvestro@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST
fraudAnalyst1	Jorge.desilvestro@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST
fraudManager	Jorge.Fraudulent@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST
fraudRuier	Michael.G@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST
newUser	RESET ENABLE - DONT EDIT THIS USER ne...@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST

1.1 ADDING NEW USERS

1. To create a new User, click on 'Add New User' on the 'User Management' screen.
2. On the 'Add User' screen you can add the 'Automatic Password Reset' functionality to the user's role by enabling the tick box option. This functionality allows the user to reset their password automatically anytime they wish.
3. You will also need to add the Username, Email, First Name, and Surname of the user you are setting up.
4. The User Role can be chosen within the 'Roles' section. The user roles are explained on the 'Add User' screen. For more information on user roles please see Section 1.2 of this guide.

The screenshot shows the 'ADD USER' form in the Global Payments system. The interface includes a sidebar menu on the left with categories like MENU, DASHBOARD, TRANSACTIONS, CUSTOMERS, TERMINAL, FRAUD MANAGEMENT, SETTLED, REPORTS, QUICK LINKS, PENDING, DELAYED, HELD, VOIDED, FAILED, ADMINISTRATION, CLIENT SETTINGS, and USER MANAGEMENT. The main content area is titled 'ADD USER' and contains the following sections:

- Automatic Password Reset:** A checkbox option.
- USER DETAILS:** Input fields for Username, Email *, First Name, and Surname.
- ROLES *:** A list of roles with checkboxes:
 - Administrator - Full user access rights
 - Sales Agent - Process transactions
 - Fraud Manager - Edit and view Fraud Management
 - Fraud Analyst - Review filtered transactions
 - Power User - Process, void, rebate, view and report on transactions
 - User Manager - Add and edit users
 - Read Only - View and report on transactions

At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE & SEND EMAIL'. The footer of the page includes a copyright notice: '© Global Payments 2018'.

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1.2 USER ROLES AND PERMISSIONS

Users of RealControl can be assigned multiple roles which define the areas and functionality to which they have access. The following roles can be assigned:

- Administrator
- Power User
- Sales Agent
- Read Only
- Fraud Manager
- User Manager

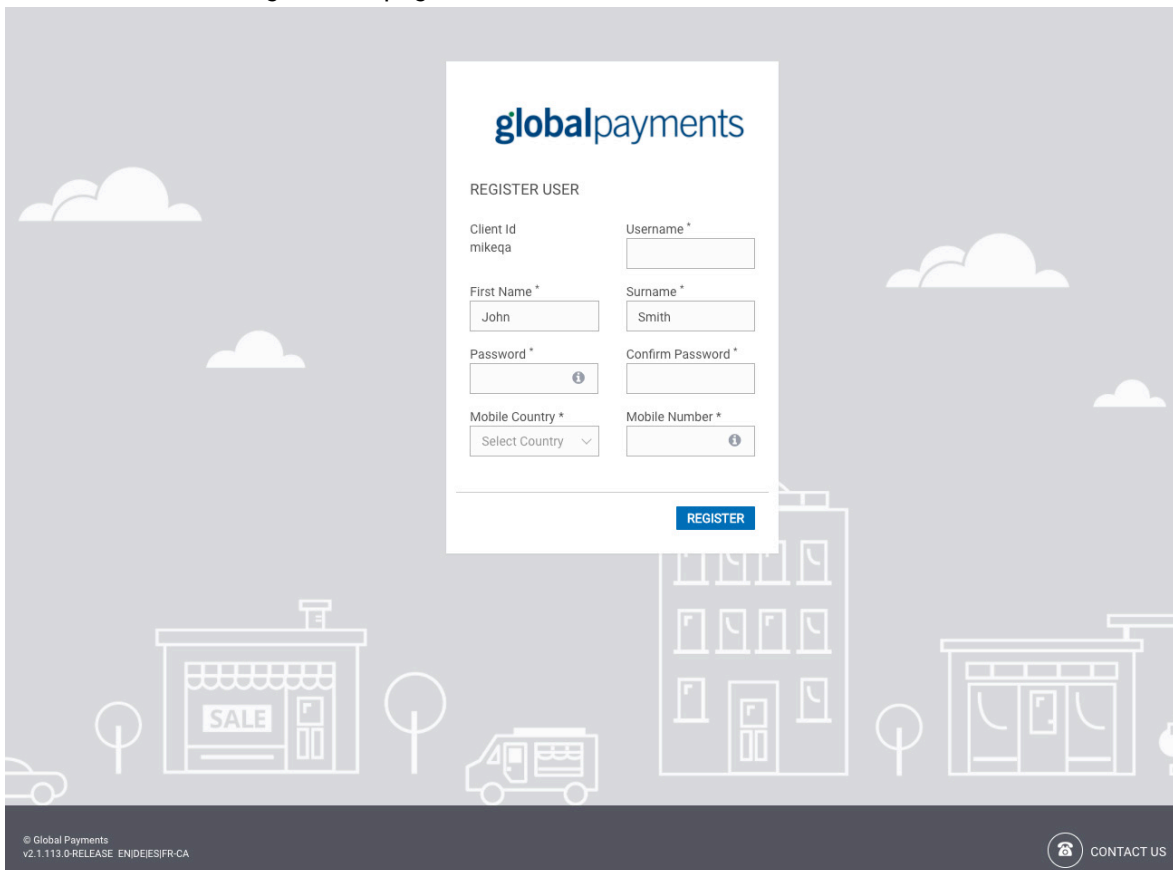
The table below details the functionality within each user role:

Action	Administrator	Power User	Sales Agent	Read Only	Fraud Manager	User Manager
Ability to view transaction details	✓	✓	✗	✓	✗	✗
Ability to generate, view and download reports	✓	✓	✗	✓	✗	✗
Ability to process sales	✓	✓	✓	✗	✗	✗
Ability to perform refunds	✓	✓	✗	✗	✗	✗
Ability to perform rebate /void/settle transactions	✓	✓	✗	✗	✗	✗
View the settings general section	✓	✗	✗	✗	✗	✗
Change your existing password	✓	✓	✓	✓	✓	✓
Add new RealControl users	✓	✗	✗	✗	✗	✓
Change the roles of other Users	✓	✗	✗	✗	✗	✓
Request an Automated Password Reset for other Users	✓	✗	✗	✗	✗	✗
View the Fraud Management section - View/Edit Rules	✓	✗	✗	✗	✓	✗

Note: All Users must be assigned at least one role.

2. USER REGISTRATION PROCESS

Once a user is created a registration email will be sent to the user's email address. Users will receive an email from **register@realexpayments.com**. Simply click on the registration link in this email to access the registration page below:



The screenshot shows a registration form titled "globalpayments REGISTER USER". The form is set against a background illustration of a city street with buildings, trees, and a bus. The form fields are as follows:

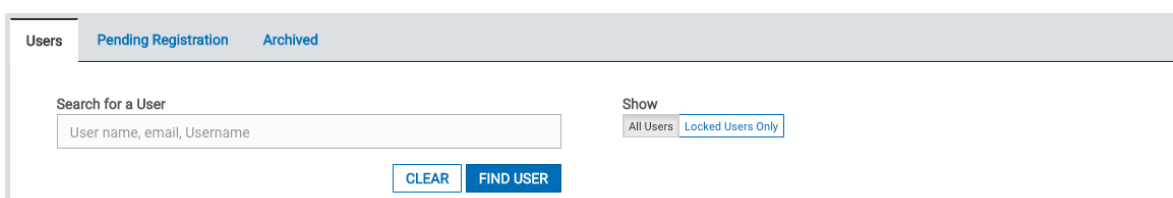
- Client Id:** mikeqa
- Username *:** [Text input field]
- First Name *:** John
- Surname *:** Smith
- Password *:** [Text input field with a help icon]
- Confirm Password *:** [Text input field]
- Mobile Country *:** Select Country (dropdown menu)
- Mobile Number *:** [Text input field with a help icon]

A blue "REGISTER" button is located at the bottom right of the form. At the bottom left of the page, there is a copyright notice: "© Global Payments v2.1.113.0-RELEASE EN/DE/ES/FR-CA". At the bottom right, there is a "CONTACT US" link with a telephone icon.

2.1 VIEWING AND EDITING EXISTING USERS

In the **'User Management'** screen you have the ability to search for users that you wish to View/Edit by entering their username/name in the **'Search for a User'** field.

1. The **'Users'** tab will show all registered users in the application.
2. The **'Pending Registration'** tab will show users who have yet to register on the application and the **'Archived'** tab will show users which have had their user access revoked. Archived users can be re-activated on the application if needed.
3. You will also have the option to view **'All Users'** or to view **'Locked Users Only'**.



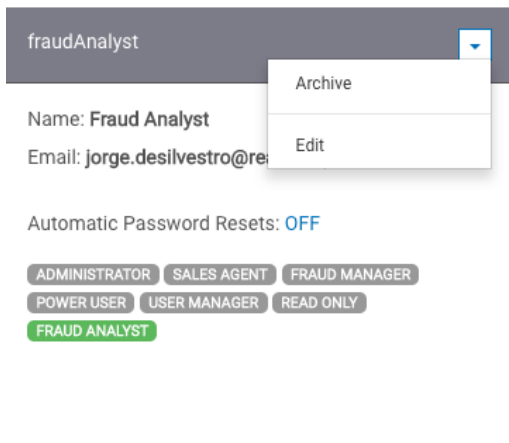
The screenshot shows the "User Management" search interface. It features a navigation bar with three tabs: "Users", "Pending Registration", and "Archived". Below the tabs is a search section with the following elements:

- Search for a User:** A text input field with the placeholder text "User name, email, Username".
- Buttons:** "CLEAR" and "FIND USER" buttons are located below the search field.
- Show:** A section with two buttons: "All Users" (selected) and "Locked Users Only".

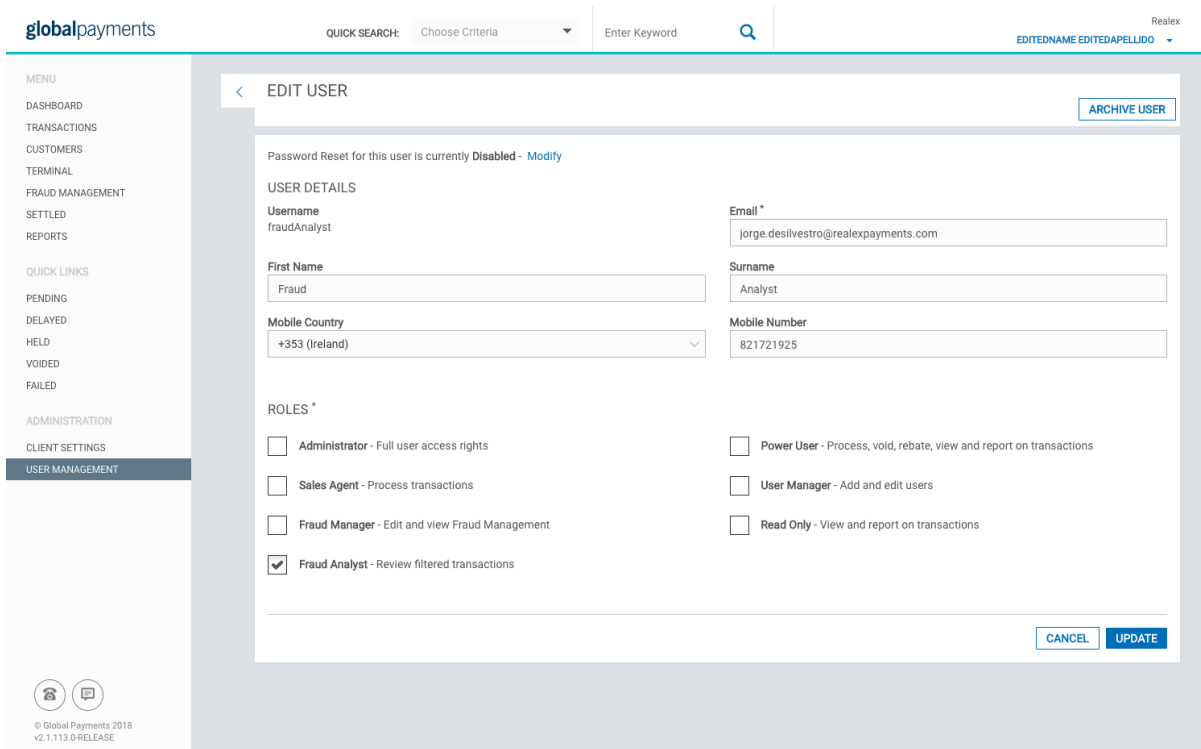
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If you wish to 'Edit' a user you can do so by clicking on the dropdown box located on the users details.

1. Click on the 'Edit' option as shown below.



Once you have clicked 'Edit', the below screen will appear:



If the user has been set up for automated password resets you will have the option to 'Send Password Reset Email'. This option allows you to send an email to the Users registered email address containing a link to reset their password.



GOT ANY QUESTIONS?

LET US KNOW

SUPPORT

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