Release Notes

Admin Platform Releases

November 2016

Release Notes

Admin Platform Releases

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Release At-A-Glance

Admin Platform Releases

Highlights

Digital Insight will release Admin Platform v.3.5 and update several other features and solutions.

Support Dashboard

Change Username *(Roadmap Item!)*

- This feature will enable your Admin Platform administrators to modify your end users' usernames through the Support Dashboard. You will gain the ability to change an end users' username in the branch or over the phone. This feature also provides added convenience when an end user is updating other information, such as a name change, with an agent.
- The existing Log Viewer transaction type, 'Account Update' (ACCOUNT_UPDATE), will be enhanced to log requests for username changes.

NOTE: Financial institutions that:

- OPTIONALLY allow users to create a username should consider the impact on their user's Digital Banking logins before making any username updates.
- DO NOT allow their users to create a username will not have this available.

Registration

This release includes enhancements to the Registration Administration Tool including:

- Feature to delete all declined Internet Banking registrations in one action.
- Automatically decline Bill Pay registrations when the same user's Internet Banking registration is declined.
- Prevent Bill Pay registrations from being approved when the user's Internet Banking registration has not been approved.
- Additional minor user experience enhancements.

Management Console Sunset

In continuing with our efforts to move away from legacy systems, Digital Insight will begin sunset activities for the following legacy items found in Management Console:

Functionality will be disabled, but sunset messaging will continue to appear:

- SRT and Notification Maintenance

Functionality and page will be disabled:

- Billpay User Profile Maintenance (Disabled the evening of Nov. 28)

- Billpay Registration and Maintenance Default Settings
- Home Banking Registration
- IB Email Address Manager
- IB End User Administration
- IB End User Preferences
- IB End User Registration
- IB Registration Fiat Authentication
- IB Summary reports
- IB Verify End User Identity
- MC Console Activity Reports
- Partners

For financial institutions with

<u>Consumer Mobile Apps (CMA)</u>

Mobile Banking Navigation Tool Enhancement

The Mobile Banking Navigation Tool in Admin Platform has been updated to allow you to:

- Create new section headers and choose whether they appear to end users before or after they log in.
- Add and edit public links, as well as links to other apps.
- Configure existing section headers.
- Rearrange the navigation by dragging and dropping items into the order that you want.
- Preview any changes to the navigation before they are seen by end users.
- PLEASE NOTE: Changes made using the enhanced Mobile navigation tool in AP will not be reflected in older versions of the app. Section headers will only be available for CMA 5.5 and above.

<u>FIS Bill Pay</u>

Single Sign-On (SSO) for FIS Customer Service Tool (CST) *(Roadmap Item!)*

Single Sign-On login credentials will be expanded within Admin Platform to allow you to access the FIS Customer Service Tool (CST).

PLEASE NOTE: Your Super User within the Admin Platform and CST administrator will need to work through a one-time setup process that will be delivered with this release.

Recommandations

- Notify your staff of improvements to the administrative user experience and new functionality; notify customers of any new features available to them.
- Use the “Action needed” notes found throughout this document to guide you on specific steps to prepare for and leverage each feature.
- If you haven't already, act on any remaining registration applications in the IB End User Registration or Bill Pay User Profile Maintenance tools prior to this release. Otherwise

pending applicants will be unable to register or be approved for Online Banking or Bill Pay.

Release Details

Support Dashboard

Change Username *(Roadmap Item!)*

Overview

The Password Expiration feature will give your financial institution the ability to update the end user's username for Digital Banking within the Support Dashboard. The end user will receive an email notification if they have one on file within Digital Banking.

Customers requested this in Idea Exchange and we're delivering it!

Benefits include:

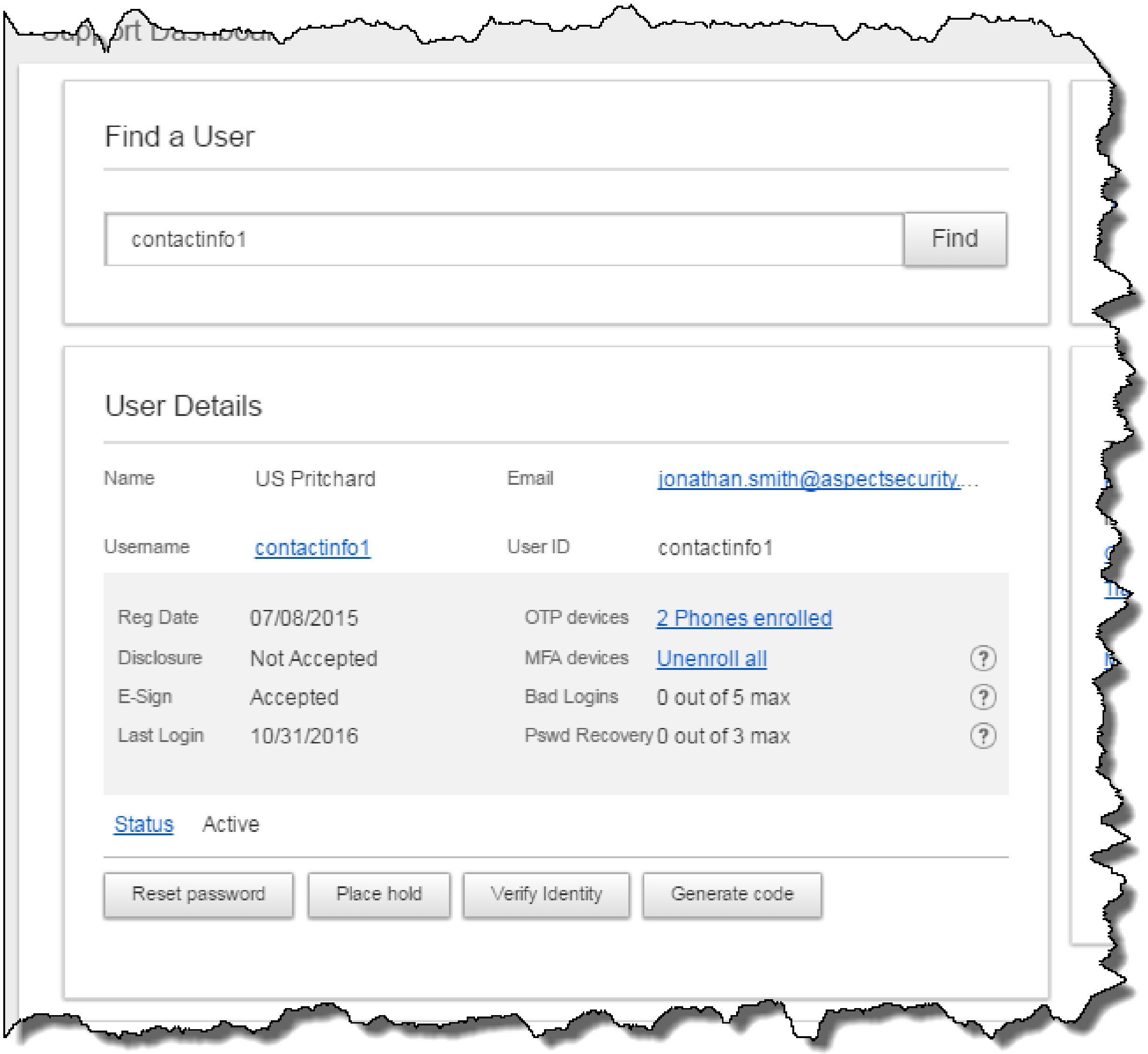
- **Control:** You will gain the ability to change an end user's username in the branch or over the phone. This feature also provides added convenience when an end user is updating other information, such as a name change, with an agent.
- **Ease of use:** This feature is easily administered through the new Support Dashboard.

Action Needed

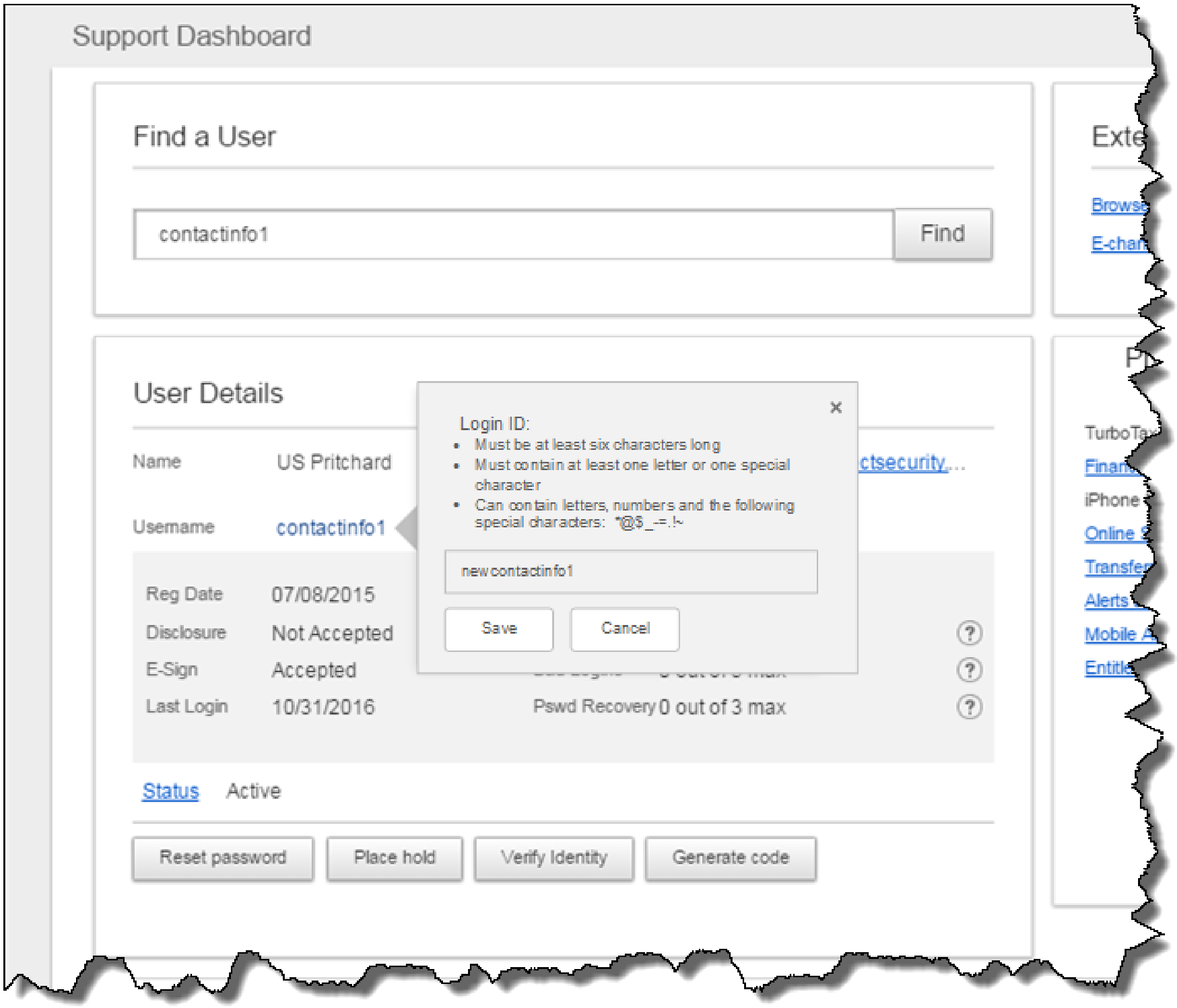
With this release, your Super Users, as well as those with the "U S P Dashboard - User Profile Update" permission will have access to the Change Username function and will be able to edit the username of your end users for Digital Banking.

Description

In the Support Dashboard, those with the adequate permissions will now see the username as a link.



When clicked, the link will open a callout box to allow the administrator to edit the username of the end user. The administrator edits the username, then clicks "Save".



Reporting

Requests to alter usernames via the Username Popup Edit Dialog Box will appear in the Log Viewer as the ‘Account Update’ (ACCOUNT_UPDATE) event “Username Edit”. Both the old username “Old username=“ + Username of end user prior to requested change” and new username ““New username=“ + The new username value being submitted” will also be logged.

PLEASE NOTE: That as we continue our migration from our legacy Log Viewer tool to Global Logging, we will be communicating an equivalent event at a future date.

Release Details

Registration

Delete All Declined Digital Banking Registrations

Saves your administrators valuable time!

Overview

Quickly delete all declined Digital Banking Registrations by clicking a single button.

Action Needed

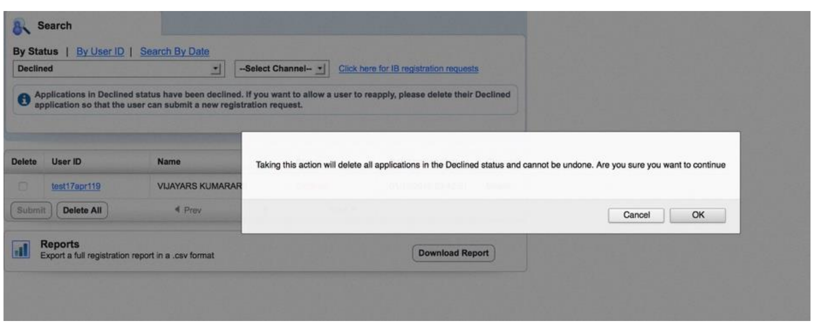
No action is required. Your financial institution will receive this update automatically as part of this release.

Description

In the Admin Platform's Registration Tool, your admins will now see a "Delete All" button. This button will only delete declined Digital Banking registrations. This performs the same actions as a single record delete over the entire batch.

Once an administrator clicks the "Delete All" button, they must confirm the action. While the Delete All is in progress, some actions within the queue may be temporarily restricted.

PLEASE NOTE that this feature is only available in the Registration Queue for this release. The Bill Pay queue may be enhanced in a future release.



Auto Decline Bill Pay Applications

Overview

Bill Pay applications will automatically be declined when the associated user's Digital Banking registration is declined.

Action Needed

No action is required. Your financial institution will receive this update automatically as part of this release.

Description

After this release, your administrators will no longer need to decline both the Digital Banking and Bill Pay registrations for a user. Declining the Digital Banking Registration will also decline the same user's Bill Pay Registration.

Prevent Bill Pay Registration Approval if the Digital Banking Registration Has Not Been Approved

Overview

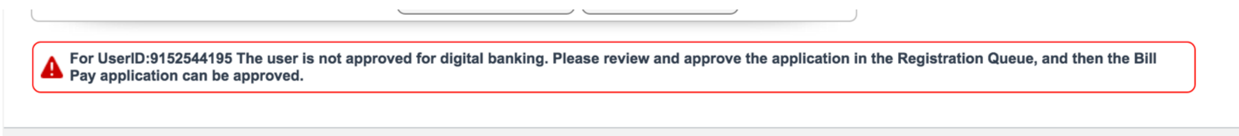
Your administrators will not be able to approve a Bill Pay Registration application if the same user's Digital Banking Registration has not been approved.

Action Needed

No action is required. Your financial institution will receive this update automatically as part of this release.

Description

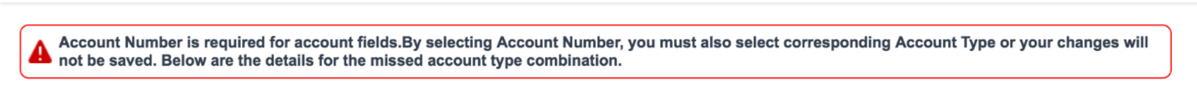
After this release, your administrators will no longer be able to approve a Bill Pay Registration if the same user's Digital Banking Registration is not approved. The administrator will receive an error message indicating that the application cannot be approved.



Miscellaneous Additional Minor User Experience Enhancements

Overview

- BPE-4431 - Updated the error messaging to accurately reflect the error for when either account numbers or account types were not both filled in.



- BPE-4423 - Fixed bug that pushed out the process date by one day when a Bill Pay application was updated by an administrator.
- BPE-4497 - Fixed error causing blank reports to be downloaded when no dates were entered in the Admin Platform fields.
- BPE-4498 - Fixed error with Bill Pay Queue where not all records were showing up when searching all records by date.

Action Needed

No action is required. Your financial institution will receive these updates automatically as part of this release.

Release Details

Management Console Sunset Activity

Overview

In continuing with our efforts to move away from legacy systems, Digital Insight will begin sunset activities for the following legacy items found in Management Console:

- **Functionality will be disabled, but sunset messaging will continue to appear:**
  - SRT and Notification Maintenance
- **Functionality and page will be disabled:**
  - Billpay User Profile Maintenance (Disabled the evening of Nov. 28)
  - Billpay Registration and Maintenance Default Settings
  - Home Banking Registration
  - IB Email Address Manager
  - IB End User Administration
  - IB End User Preferences
  - IB End User Registration
  - IB Registration Fiat Authentication
  - IB Summary reports
  - IB Verify End User Identity
  - MC Console Activity Reports
  - Partners

Action Needed

Your administrators must act on any remaining registration applications in the IB End User Registration or Bill Pay User Profile Maintenance tools prior to this release. Otherwise pending applicants will be unable to register or be approved for Online Banking or Bill Pay.

Description

Functionality will be disabled, but the page will remain with messaging on alternate navigation:

Legacy CGI	Replacement in Admin Platform
SRT and Notification Maintenance	**Administration > Online Banking > Transfers**

The page will be removed:

Legacy CGI	Replacement in Admin Platform
Billpay User Profile Maintenance (Removed Nov. 28)	**Administration > Registration > Bill Pay Queue**

Billpay Registration and Maintenance Default Settings	**Administration > Registration > Configuration**
Home Banking Registration	**Administration > Registration > Queue**
IB Email Address Manager	**Administration > Online banking > Email Address Manager**
IB End User Administration	**Home > Support Dashboard**
IB End User Preferences	**Home > Support Dashboard**
IB End User Registration	**Administration > Registration > Queue**
IB Registration Fiat Authentication	**Administration > Registration > Queue**
IB Summary reports	**Reports > Summary Reports**
IB Verify End User Identity	**Home > Support Dashboard**
MC Console Activity Reports	**Home > Log Viewer**
Partners	**Administration > Partners**

Release Details

Consumer Mobile Apps (CMA)

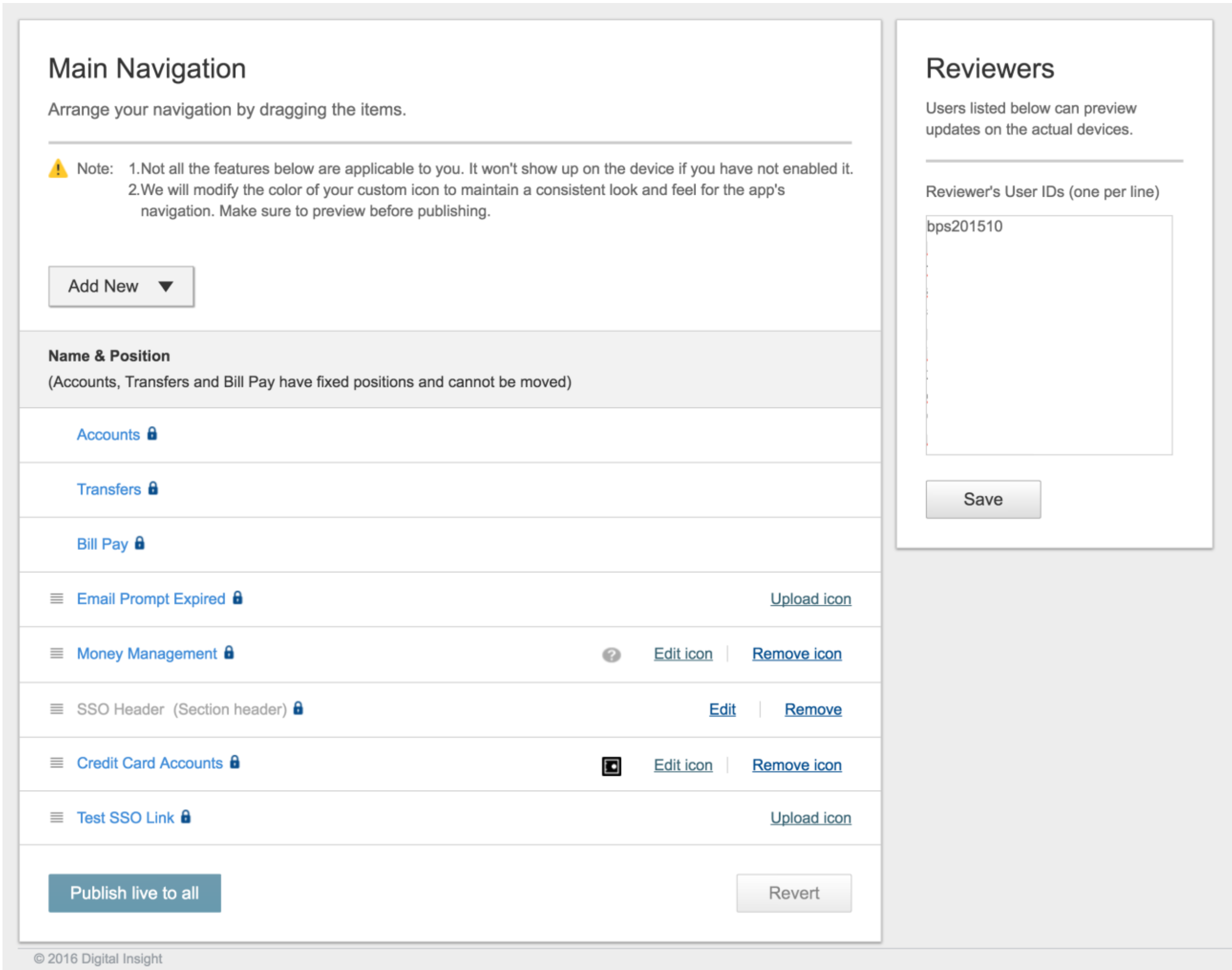
CMA Navigation Tool Updates

Overview

With this new Mobile Navigation Tool update, financial institution administrators will be able to:

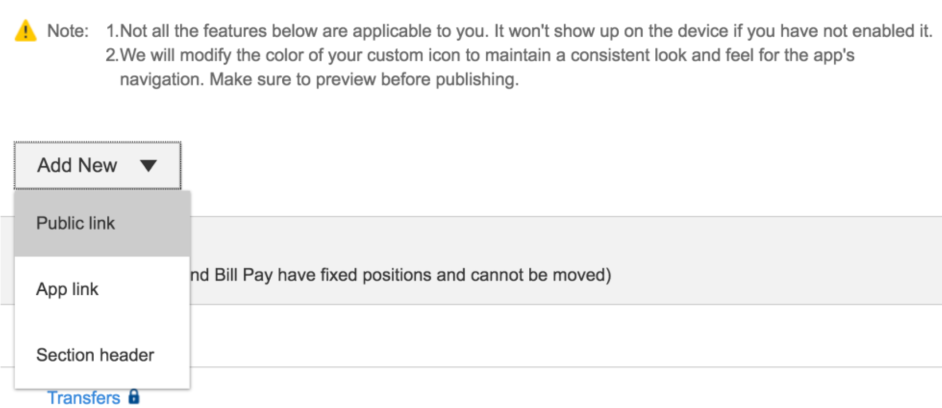
- Add & Edit Section Headers
- Add & Edit Links to a Third Party App
- Add & Edit a Public Link

PLEASE NOTE: End users will need to be on Mobile Banking Apps v.5.5 in order to view the custom navigation changes. We will communicate further timing for v.5.5 with an upcoming Roadmap publication and/or client communication.



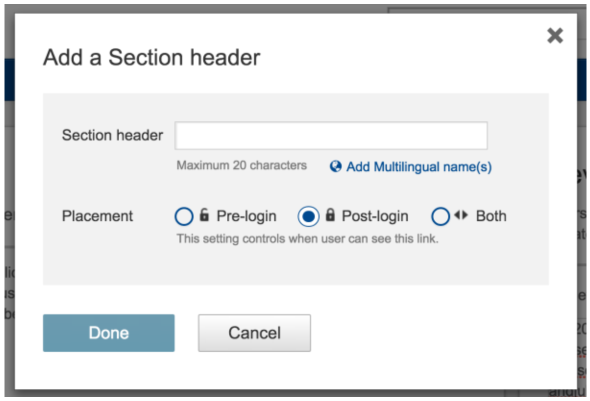
Adding/Editing a Section Header

1. Click on the “Add New” dropdown and select the “Section header”.



2. Add your section header name
3. Select your header placement

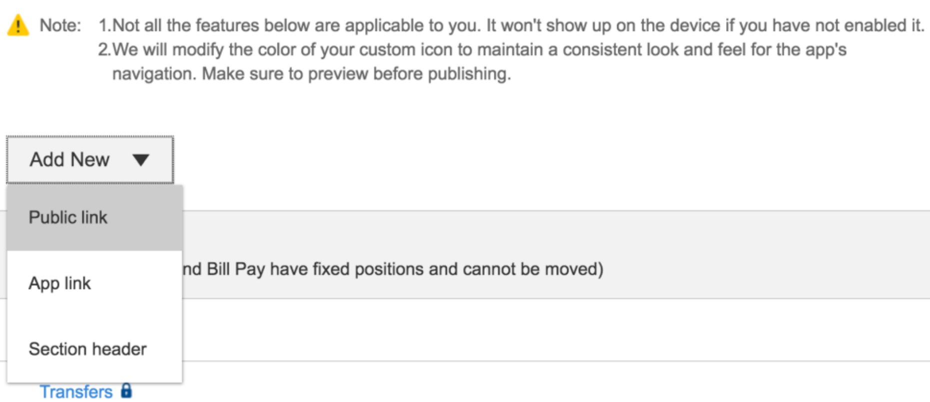
1. **Pre-login –** Will show to end users even if they are not logged in and authenticated.
2. **Post-login –** Will only show to end users if they are fully authenticated.



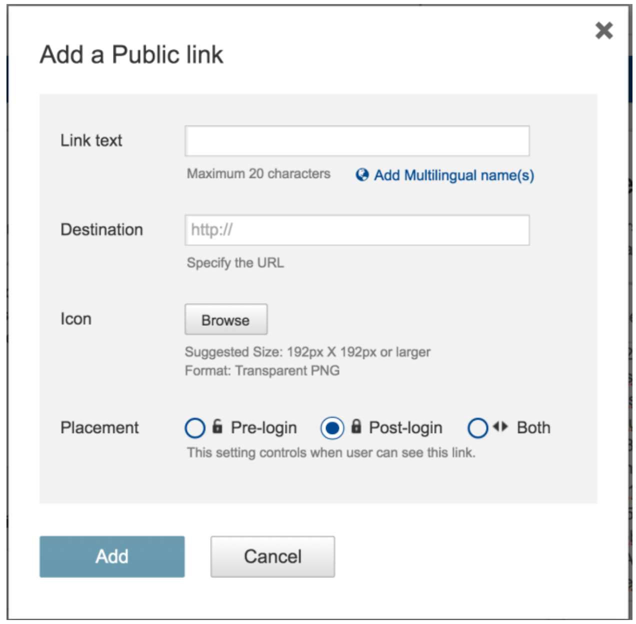
**You can also edit these section headers by clicking the "Edit" option*

Adding/Editing a Public Link

1. Click on the "Add New" dropdown and select the "Public Link".



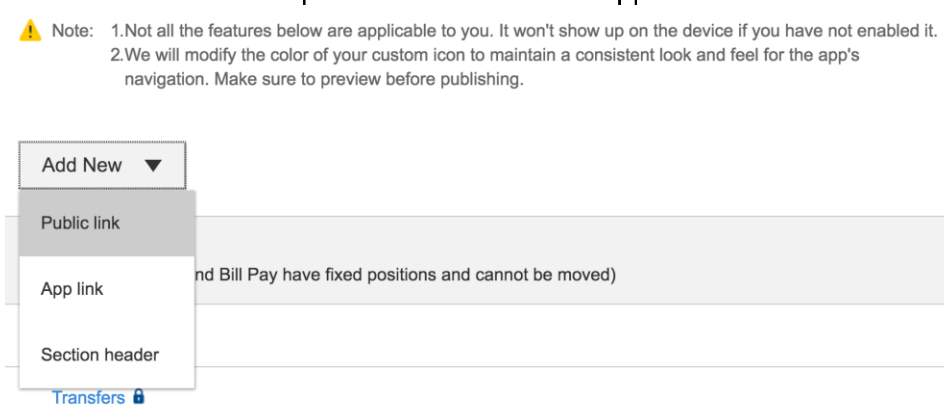
2. Add your Link Text and Destination URL.
3. Upload an Icon.
4. Select your header placement:
   1. **Pre-login –** Will show to end users even if they are not logged in and authenticated.
   2. **Post-login –** Will only show to end users ONLY if they are fully authenticated.



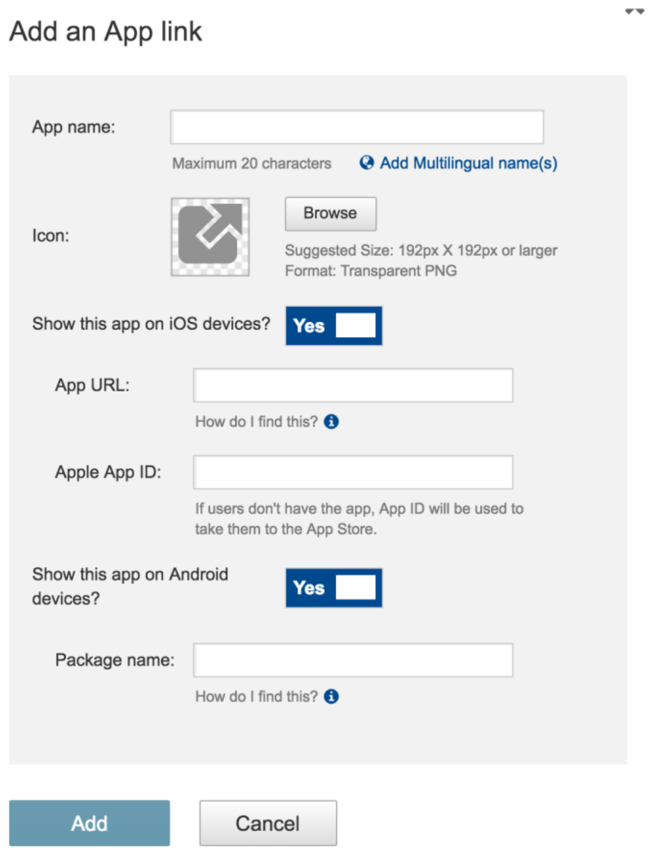
**You can also edit these Public Links by clicking the "Edit" option*

Adding/Editing an App Link

1. Click on the "Add New" dropdown and select the "App Link".



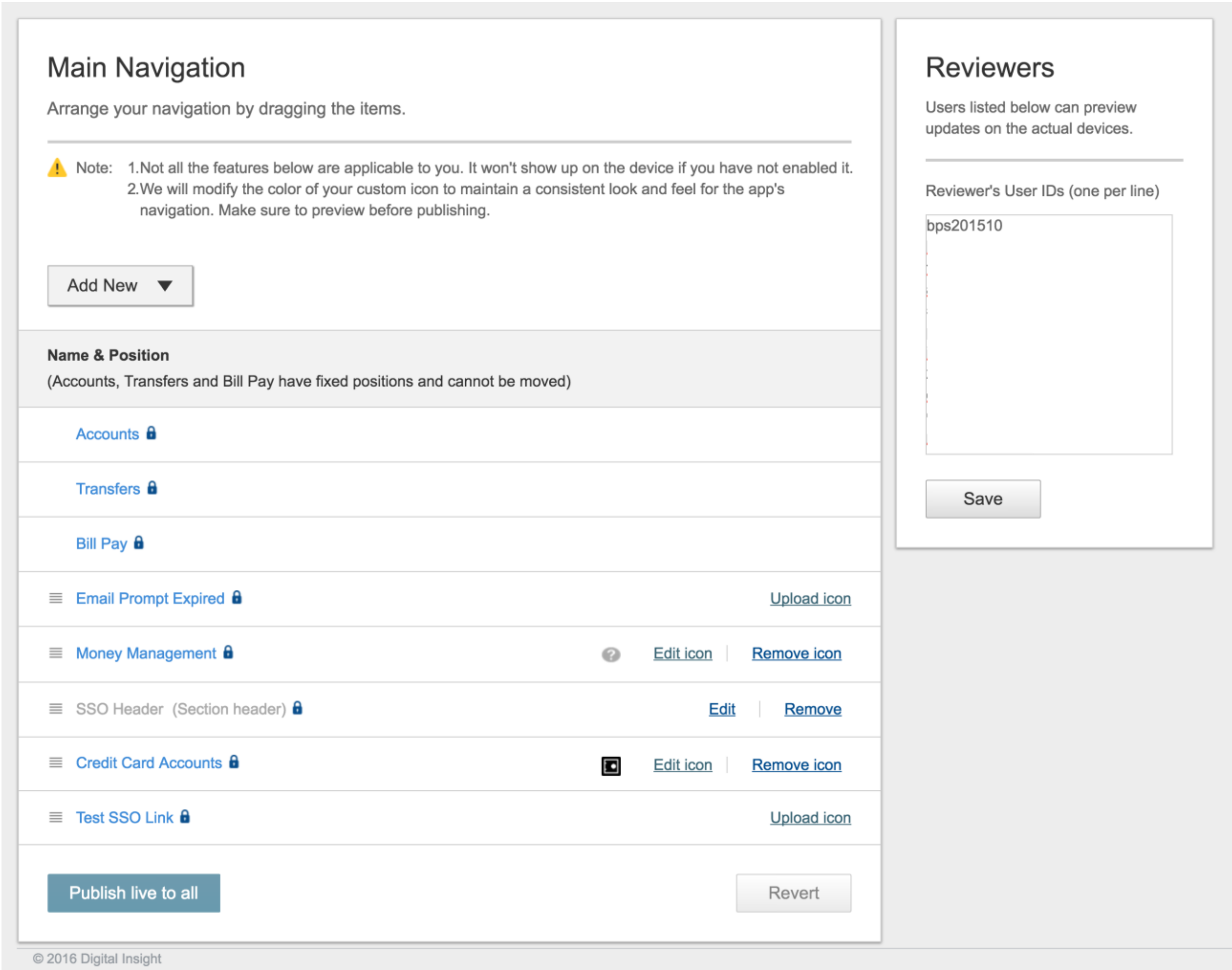
2. Add your App Name and Upload an icon.
3. Select what devices should see this app link:
   - **For iOS devices**, you will need to provide the App URL and the Apple App ID.
   - **For Android devices**, you will need to provide the package name.



**You can also edit these App Links by clicking the "Edit" option*

Rearranging the Navigation

- Financial institution Admins can rearrange the navigation by dragging and dropping the navigation in to the order that they want.
- Once the navigation has been re-ordered, the reviewers will have the ability to preview these changes.
- If you are happy with the new navigation changes, you can click the "Publish live to all" button to push these changes into production.



Action Needed

No action is needed. The navigation tool will be updated automatically.

Release Details

FIS Bill Pay

Single Sign-On (SSO) for FIS Customer Service Tool (CST)

Overview

Single Sign-On login credentials will be expanded within Admin Platform to allow you to access the FIS Customer Service Tool (CST).

Provides instant access to CST once you are logged into Admin Platform and removes the need to maintain two sets of credentials between CST and AP.

Action Needed

Your Super User within Admin Platform and CST administrator will need to work through a one-time setup process that will be delivered with this release.

Super Users can delegate access via the *Partners – FIS CST SSO Enablement* permission.

Description

We have been working with our partners at FIS to deliver a Single Sign-On (SSO) from Admin Platform to their Customer Service Tool (CST).

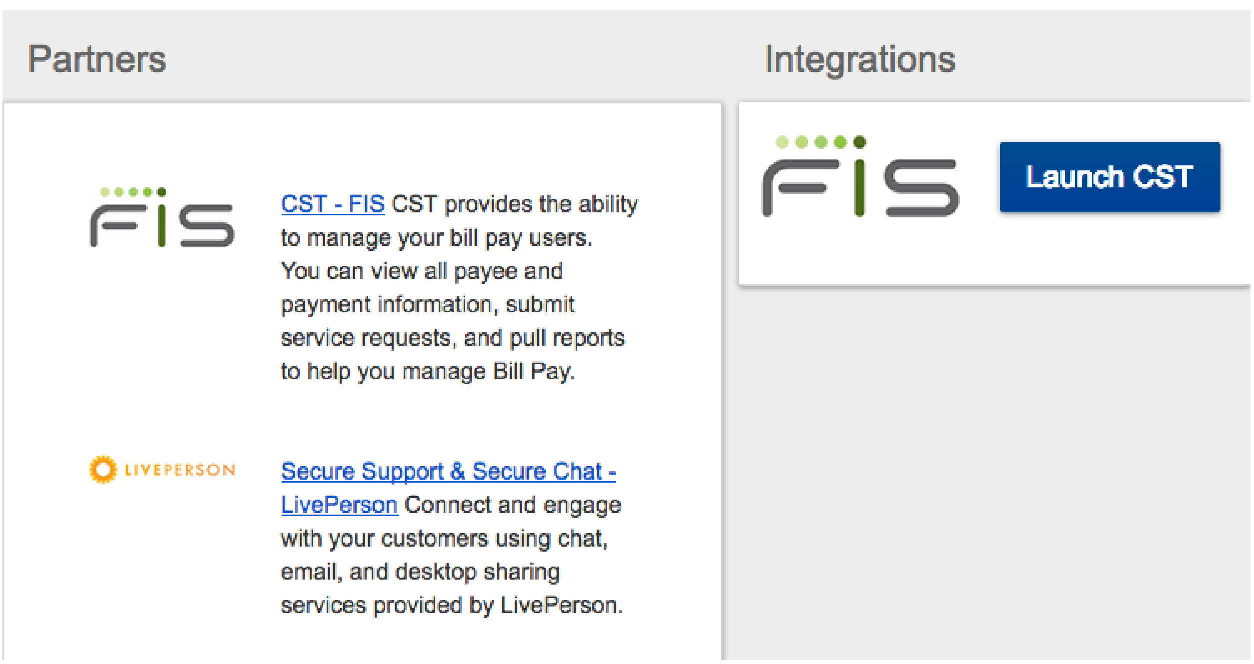
In order for Admin Platform to perform the SSO for your administrators, we need you to provide information to us. In order to make this easier, we have provided an enablement tool that will allow your Super User to setup the SSO and the CST entitlements that your administrators will have.

To support entitlements within CST, we are delivering a role mapping tool that allows your Super User to set up access rights for your administrators prior to enabling the SSO.

AP User Permission		CST User Role
CST Permission 1	→	Please enter a CST user role name
CST Permission 2	→	Please enter a CST user role name
CST Permission 3	→	Please enter a CST user role name
CST Permission 4	→	Please enter a CST user role name
CST Permission 5	→	Please enter a CST user role name

If this seems confusing, don't worry. Our learning and development team is delivering an example walkthrough to help guide you through the setup. Simply click the interactive user guide when you access the page.

As soon as the enablement is complete, administrators will be able to access the CST from our new Partners page located at **Administration > Partners** utilizing the "Launch CST" button in the Integrations column.



Frequently Asked Questions

Will our direct logins to the CST still work?

Yes, although it is recommended that you delete the direct login accounts for all users other than your CST administrator accounts once a successful SSO is completed. The SSO mechanism creates new and unique accounts within the CST for each of your Admin Platform users that access it.

What is the timeout for CST?

The timeout for CST after the SSO is currently set to 15 minutes. We are working with FIS to get that extended to better match the Admin Platform timeout.

Will any functionality be restricted from the SSO?

CST Administrator level functionality will be unavailable via the SSO.

Will the SSO work for DI, my third party support provider, or my Holding Company?

Yes, although access will be denied if IP white listing is in place for your network.

How will activity after the SSO be reflected in CST reporting?

All users logging into CST using the SSO or performing actions after the SSO will be logged using their Admin Platform login ID in the format of {diid}.{login id} for example 01234.jdoe.