New User Profile Setup

Tomorrow Begins Today

Ulster Bank

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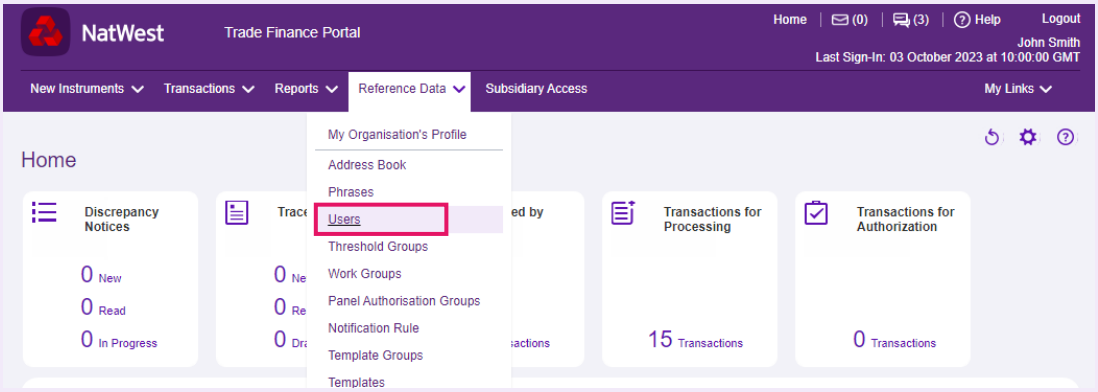
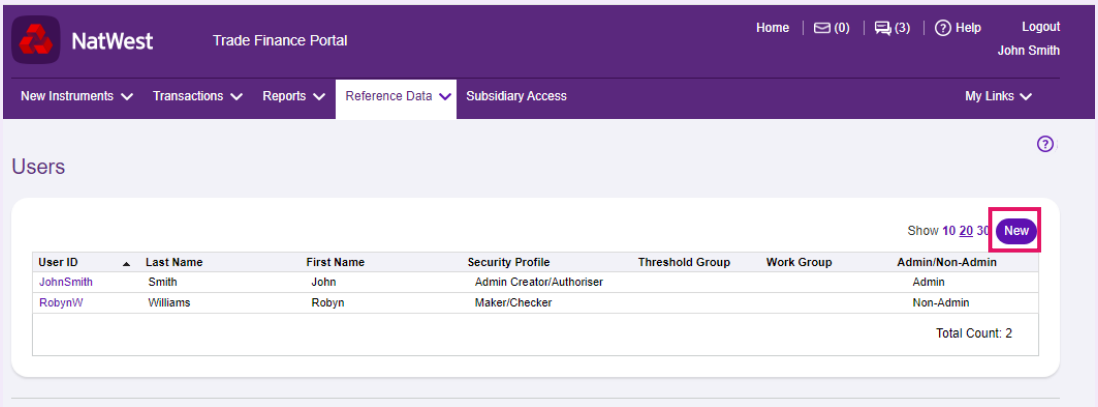
Introduction

Log into the Trade Finance Portal.

To create a new User Profile, from the home screen select ‘Reference Data’ then ‘Users’:



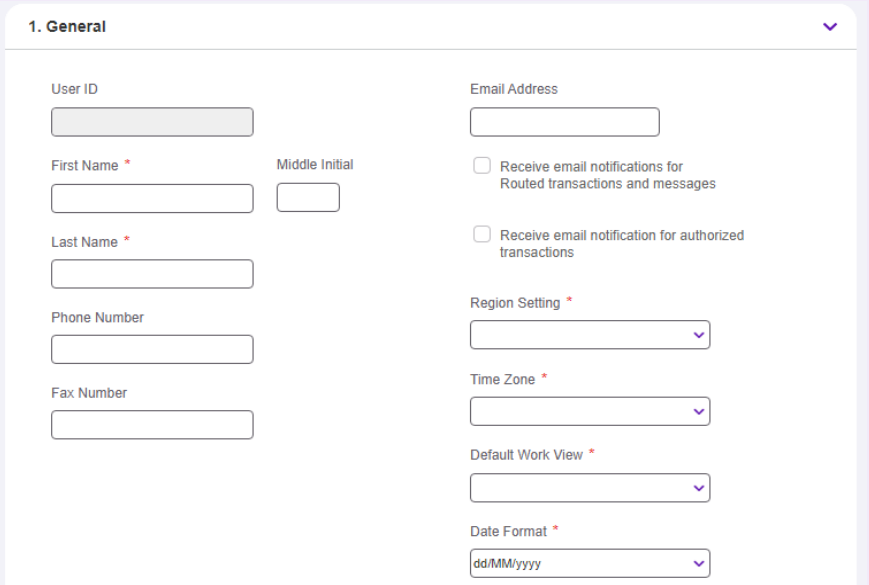
Then select “New”:

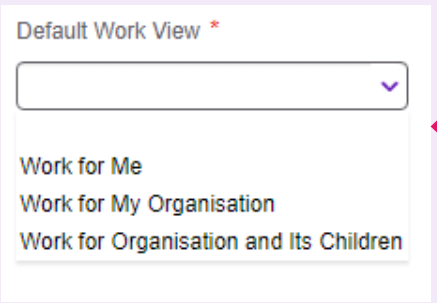


General

Complete all the fields below where there is a Red Asterix. For the section “Default Work View” please see below.

** Please ensure you add your email address as this is a mandatory field. **

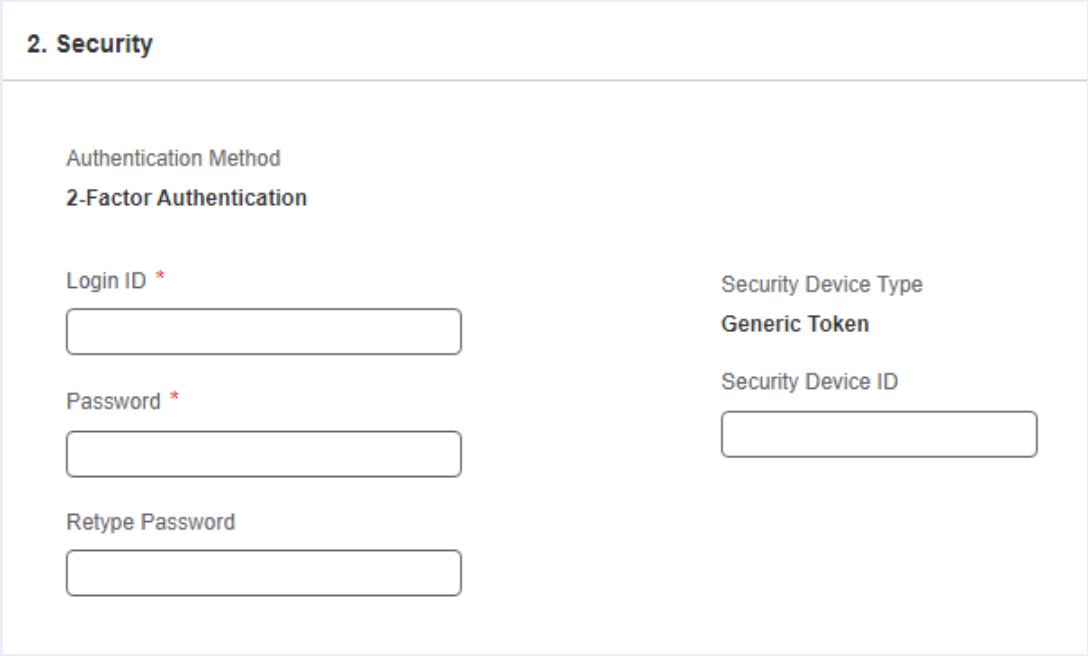




Default Work View:

1. Work for Me – This option will show only items designated to that user to action.
2. Work for My Organisation – This option will show all transactions for the organisation.
3. Work for Organisation and its Children – This option will show all transactions for the organisation and its subsidiaries.

Security

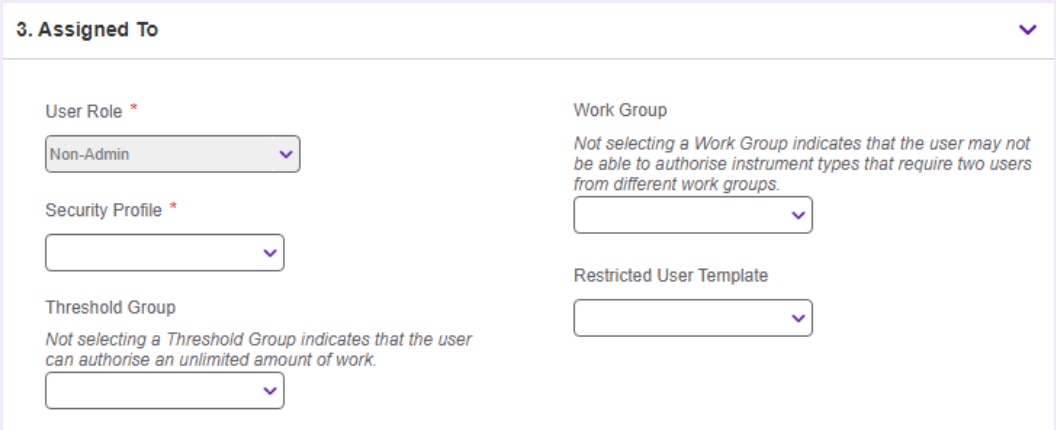


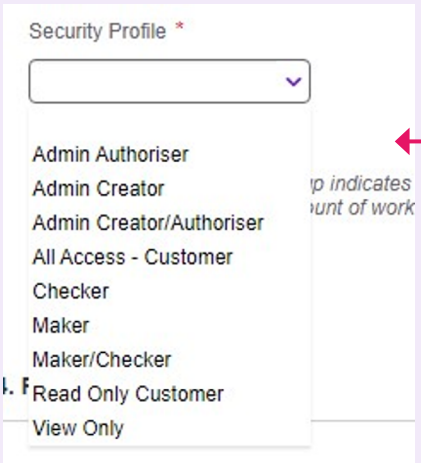
Please add a Login ID and Password here. Each must be unique to the User – If a Login ID has been previously taken, an error message will appear.

Once the password has been set, when the User first logs into their account, they should click on their name in the top right corner of the home screen and change the password to their own unique choice.

User Access

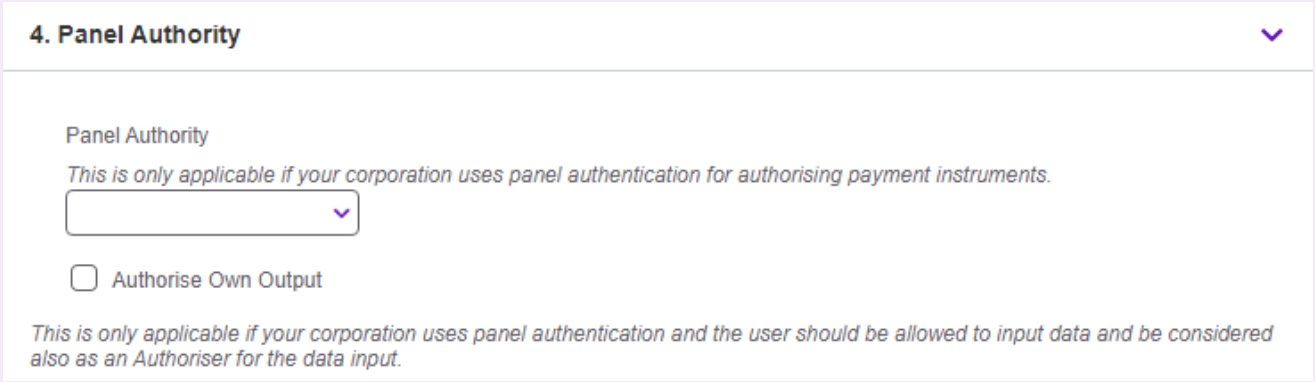
All new users will have a User Role as Non-Admin, however new users can be given Administrator Access by selecting the correct Security Profile, see below options:





See customer guide entitled 'Security Profiles' to explain the permissions designated to each profile.

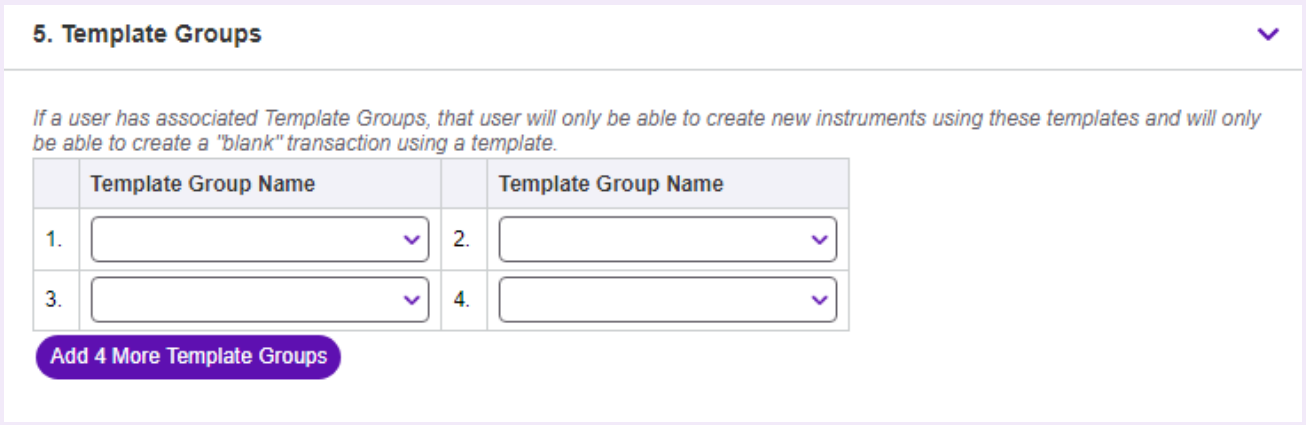
Panel Authority



Panel Authority allows you to route transactions to specific levels of authority within your company dependent on transaction value. Please contact the Portal Support Team if you have specific transaction authorisation requirements.

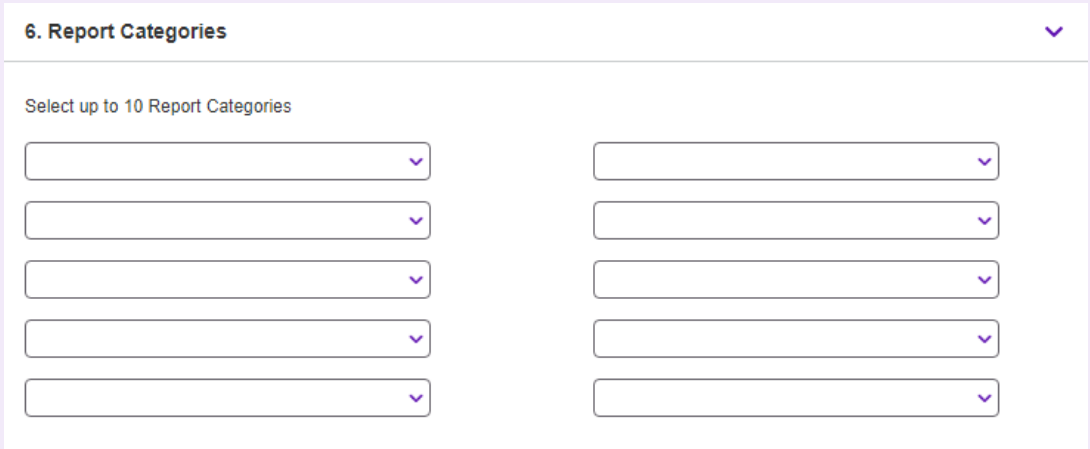
Template Groups

For this section, if templates have been created then you will be able to restrict which templates the new user will have access to:



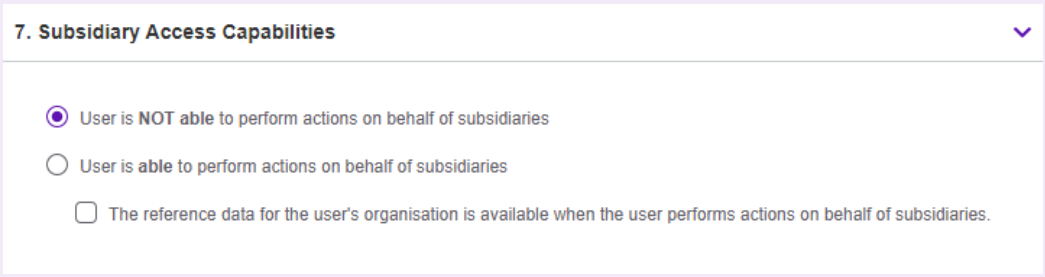
Report Categories

For the new user, if there are specific reports that they should only have access to, then they can be selected below:

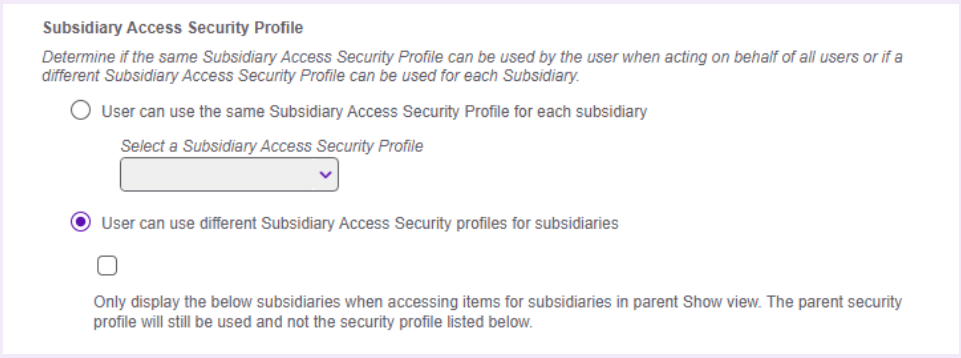


Subsidiary Access

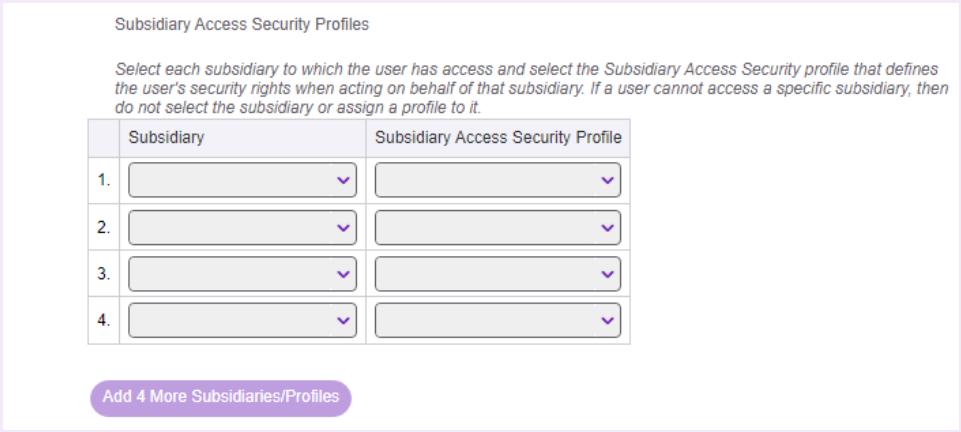
This section determines whether the new user has access to view or perform actions as a parent on behalf of the subsidiary or not:



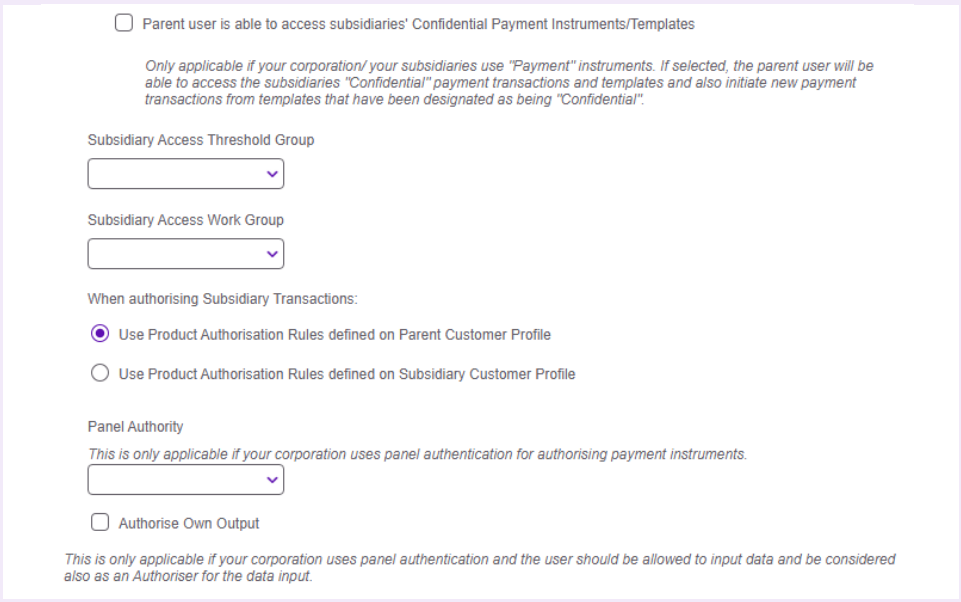
You can also select the level of access per subsidiary – They can either have the same access across all parties or separate access levels per entity:



If they are to have separate access, the below is how to designate this access:

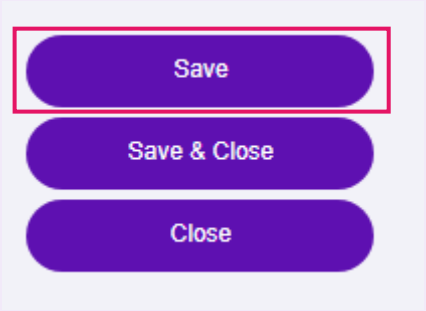


Contact the Portal Support Team regarding the below if the new user is to have separate authorisation levels for the subsidiaries to the main Parent entity:



Submitting

Once all the fields are complete, click on “Save”. Once this is done – You will be prompted to have the user be authorised:



The second User will then need go into Reference Data – “Approve Reference Data” and select the new User and then click on Approve: