



REPORTING TOOL USER GUIDE

USER MANAGEMENT 2016

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 Elavon User Management interface. At the top, there is a navigation menu on the left with sections for 'MENU' (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports) and 'QUICK LINKS' (Pending, Delayed, Held, Voided, Failed). Below this is the 'ADMINISTRATION' section with 'Client Settings' and 'User Management' (selected). The main content area is titled 'USER MANAGEMENT' and includes a search bar, a grid of user profiles, and an 'ADD NEW USER' button. The user profiles are arranged in a 3x3 grid. Each profile card shows the user's name, email, a 'SEND RESET PASSWORD EMAIL' button, and a set of role tags: ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, and FRAUD ANALYST. The 'derekterminal' user has a 'Terminal Only' status. The interface also shows a 'Quick Search' bar at the top with 'Choose Criteria' and 'Enter Keyword' options, and a user profile dropdown at the top right showing 'new terran inc' and 'desafd das'.

User ID	Name	Email	Roles	Automatic Password Resets
mikefraud	mikael goardet	mikael.goardet@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
admin	michael.grogan@realexpayments.com	michael.grogan@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
clairebauden	claire bauden	claire.bauden@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
daniel	dan test	Daniel.Aguado@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
derekterminal	Terminal Only	derek.glennon@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
derekv	Derek VT	derek.glennon@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
Eoin	Eoin Jennings	eoin.jennings@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
eoinRead	Eoin Read	eoin.jennings@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF
eoinTest	Eoin Test	eoin.jennings@realexpayments.com	ADMINISTRATOR, SALES AGENT, FRAUD MANAGER, POWER USER, USER MANAGER, READ ONLY, FRAUD ANALYST	OFF

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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' interface. At the top left is the Elavon logo. A search bar contains 'Choose Criteria' and 'Enter Keyword'. The user 'desafd das' is logged in. The left sidebar has a 'MENU' with options like Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, and Reports. Below that are 'QUICK LINKS' (Pending, Delayed, Held, Voided, Failed) and 'ADMINISTRATION' (Client Settings, User Management). The main area is titled 'ADD USER' and contains a form with the following sections:

- Automatic Password Reset
- USER DETAILS**
 - Username: [text input]
 - Email *: [text input]
 - First Name: [text input]
 - Surname: [text input]
- ROLES ***
 - 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 are 'CANCEL' and 'SAVE & SEND EMAIL' buttons. The footer includes '© Elavon Inc 2017 - v2.1.104.3-RELEASE' and the 'powered by realox payments' logo.

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1.2 USER ROLES AND PERMISSIONS

Users of the Reporting tool 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 Reporting tool 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.

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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@elavonpaymentgateway.com**. Simply click on the registration link in this email to access the registration page below:

Elavon

REGISTER USER

Client Id: terran

Username *

First Name *

Surname *

Password *

Confirm Password *

Mobile Country: Select Country

Mobile Number

REGISTER

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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'**.

Users Pending Registration Archived

Search for a User

User name, email, Username

Show

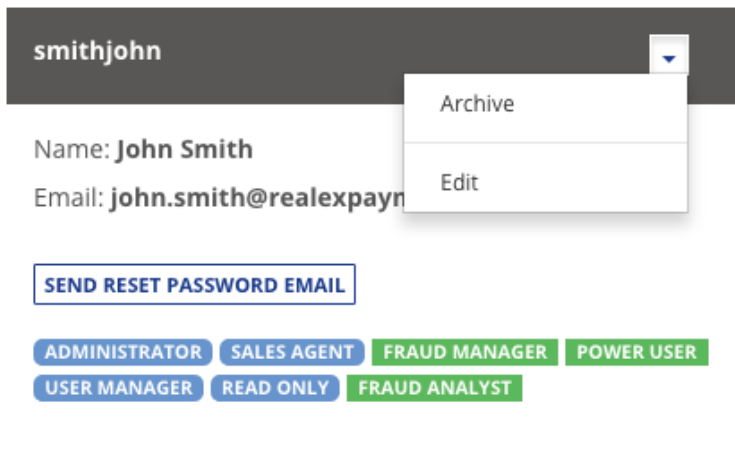
All Users Locked Users Only

CLEAR **FIND USER**

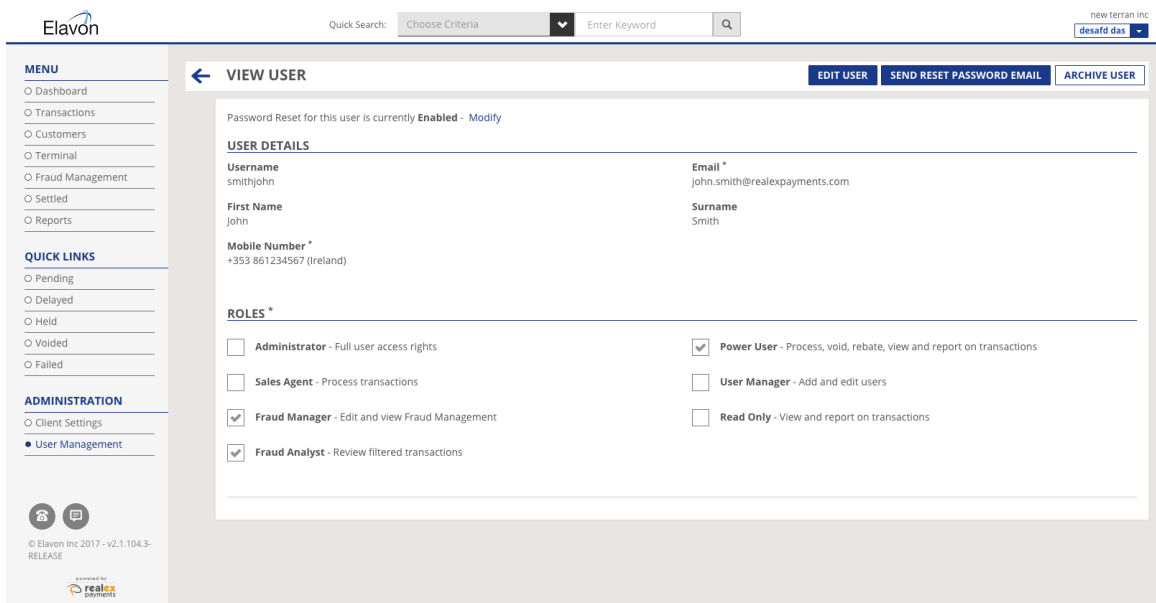
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If you wish to **'Edit'** a user you can do so by clicking on the dropdown box located on the users details.

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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