



ePDQ

User Guide – Basic Access

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Software Version: 5.9 Payment Engine & Internet Authentication

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Section	Topic	Products
A Basic Access	How to Log On/Out	CPI MPI Lite

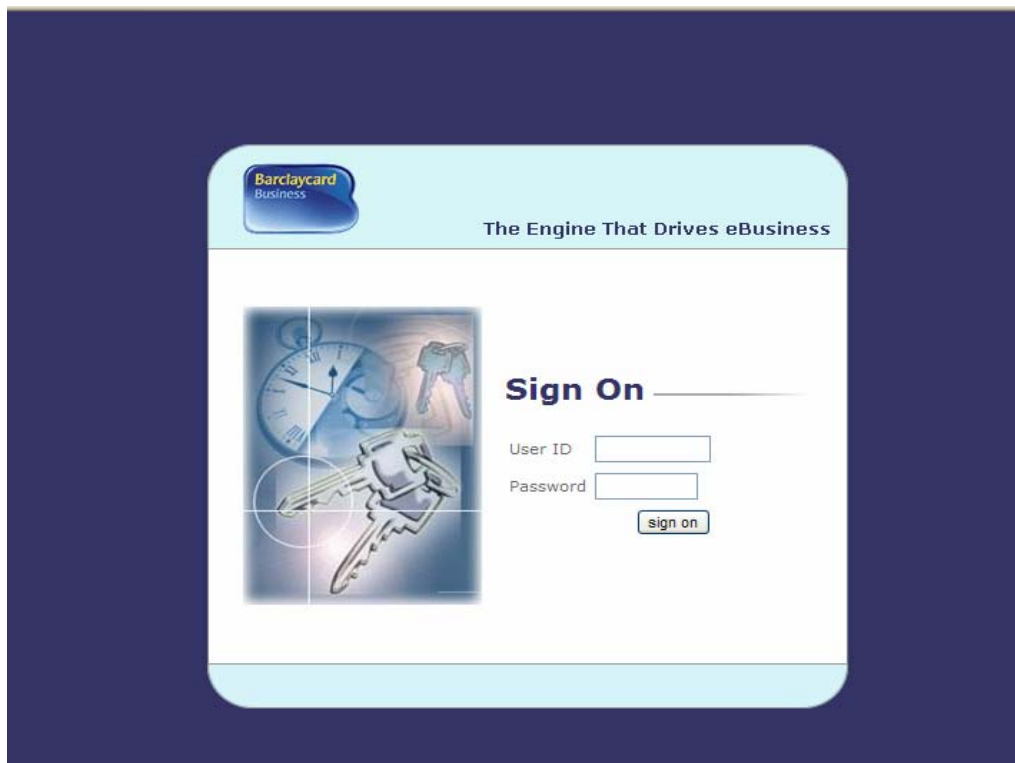
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Logging On

The ePDQ product is supported by a very comprehensive Store Admin Tool. This allows you to view orders, perform transactions, strategy rules and manage your ePDQ store.

You access your store via a secure URL. When we initially set up your ePDQ store, you, or your nominated web developer will receive an email confirming your store details. This will contain the unique store ID (a numeric value), the URL from which you can access your store, a user ID and a prompt for you to call us for your password.

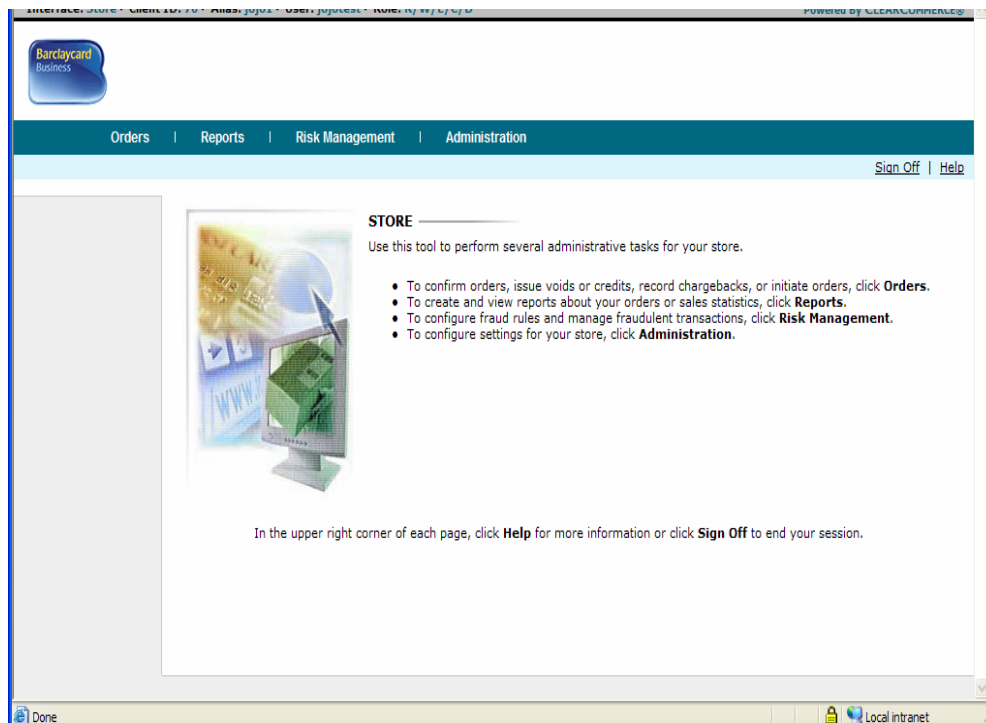
Upon receipt of the mail you must contact the eCommerce Support Team on 0844 822 2099 to obtain your password. Once obtained, you should click the URL link sent in the email to access your store.



You must log into your ePDQ store using the log in details we provide to you. Upon successful login, you are able to set up further users and can either change or delete the initial password provided to you. You will have three attempts to log into your store. If, after the third attempt, you fail to enter the correct details your store will be locked. You will need to contact us to unlock your store.

Once successfully logged into your store, you will see the set up information displayed as shown below:

- **Interface** – this will always be Store.
- **Client ID** – this is the unique ID for the store.
- **Alias** – this is an alternative alias that can be assigned to the store, i.e. "Mystore".
- **User** – this is the name of the user accessing the store.
- **Role** – this is the role with associated permissions that the user has within the store.



Using the Store Admin Tool

Once successfully logged in, you are able to navigate the store. There are four main options available, which are explored in more detail later in this user guide. The main areas are:

- **Orders** – this allows you to manage your orders on a day to day basis for the purposes of reconciliation, or to perform basic transactions.
- **Reports** – provides you with management information on all transactions processed and settled through your store.
- **Risk Management** – supports comprehensive risk management tools to help identify and minimise fraudulent transactions through your store.
- **Administration** – controls the store configuration.

Obtaining Help

You can use the on-line help tool supplied with your ePDQ store at any time by clicking on the "Help" link in the top right hand corner. This displays a full index of features available, and provides useful tips for how to operate your store.

We strongly recommend that you familiarise yourself with the help screens.

Logging Out

Whenever you have completed activity within the store you must log out. This prevents unauthorised access to your store as the password and user ID will be required to log back in.

To log out, simply select "Sign Off" on the top right hand corner of your store.

If your store remains inactive for more than 30 minutes you will be logged out automatically. You will need to re-enter your user ID and password to gain access.

TIP! Do not just close your browser to sign out of the store. This will not sign you out correctly and could allow unauthorised access if someone re-opens your browser.

Section	Topic	Products
A Basic Access	Controlling Access to your Store	CPI MPI Lite

Main Document Reference	Store Administrator Guide. Managing Users. Page 48
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Managing Users

When your ePDQ store is initially set up, we will provide you with a user ID that allows full permissions across your store. The set of permissions allocated to the user is defined by which Role we have allocated. Typically we will allocate an "ePDQ Level 4" role which gives you full permissions.

You can create new users with different role allocations, allowing different access levels throughout the store.

Store users only have access to the store they are allocated to. As long as you have the correct permissions, you can set up new store users. The process is described below:

1. After you have logged into the store, click **Administration** from the top four options.
2. Select **Users** from the menu on the left. The User Configuration Page displays all currently configured store users. To work with a user, you need to click the "select" button. From this page, you can:
 - **View** the selected users permissions
 - **Add** a new user and assign it a role
 - **Update** a selected users configuration
 - **Delete** a selected user
3. Depending on what option you select, you will be required to complete details as indicated on the screen. Details of how to add a user follow this section.

TIP! If you make any changes to an existing user to change the page display size or role assigned to them, that user will have to sign off and back in again before the changes are effective.

Section	Topic	Products
A Basic Access	Roles, Permissions and Actions	CPI MPI Lite

Main Document Reference	None
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Each and every user that accesses either your ePDQ store, or submits transactions using the ePDQ CPI and MPI will be allocated certain user permissions. These are grouped together under the headings of "Roles". These are, in essence, profiles that determine what that user is able to do, and can also prohibit them for undertaking certain activities.

Roles can be broken down into:

- Role Configuration

This is the high level setting for the role. Typically a role is used for a standard type of activity. For example, if the role is "ePDQ Level 1", then this would be associated to a user who performed simple operations within ePDQ.

- Resources

Describes the type of functions you want the role to do. For example, one of the resources of ePDQ level 1 will be "Payment Transactions" which would allow them to perform defined transactional activities.

- Actions

Within each resource, you can allocate specific actions. There are a range of actions that are allocated to you. As administrators we will also have specific actions allowing us to perform high level tasks. The actions most commonly assigned to store level roles are:

- Get – this allows you to retrieve/read data.
- Add – this allows you to add new items such as a new user, or fraud rule
- Update – Allows you to update information such as store details.
- Delete – Allows you to delete information such as user details.
- Execute – this is required to perform activities such as submit transactions.

The Roles available to you can be found in the Role drop down list. There are a number of roles available. ePDQ has four specific roles created which we recommend you adopt. These are detailed in the next section.

Section	Topic	Products
A Basic Access	Password Security Policy	CPI MPI Lite

Main Document Reference	Store Administrator Guide, Chapter 4 Page 49
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Changing passwords on a regular basis can help tighten security, and the best way to ensure that passwords are changed regularly is to have them expire regularly. When a user's password expires, that user cannot sign-on to the ePDQ Administration Tool until he or she changes the password.

The screenshot shows the 'User and Password Expiration Policy' configuration page in the ePDQ Administration Tool. The page has a sidebar on the left with navigation options: Store, Users (Security Policy), Access Control (Role Search), Payment (Routing, Processor), Settlement, Digital Receipt, Shipping (Carrier, Zone, Freight), and Tax. The main content area is titled 'User and Password Expiration Policy' and contains a table with the following data:

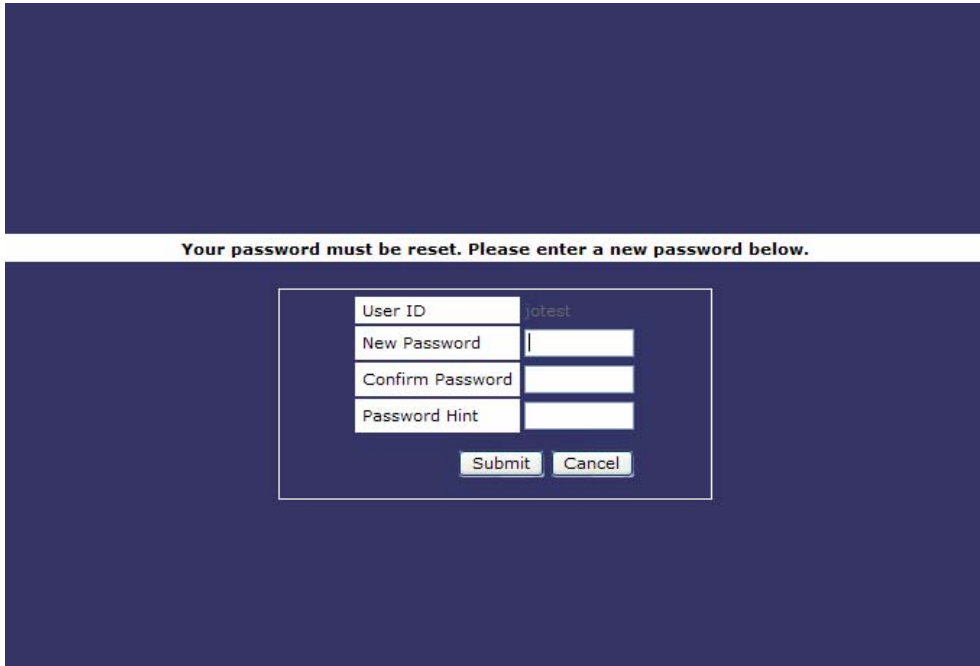
Active	Description
<input type="checkbox"/>	User must reset initial password
<input type="checkbox"/>	User must reset password assigned by an administrator
<input type="checkbox"/>	Expire passwords after 90 days Warn user within 7 days of expiration

Below the table, there are three links: [Apply changes](#), [Restore policies to default](#), and [Reset form values](#).

To manage password expiration, you can define the following:

The amount of time that a password can be used on the ePDQ Administration Tool for example, if the password expiration is set to a 30-day time interval, a user cannot use a password for more than 29 days. You can also set the ePDQ Administration Tool to warn the user within a configurable time that the password is going to expire.

A user's password also can be configured to expire at the first login or after the password is reset by an administrator. The initial password issued by an administrator is valid for the user's first login only. At that time, ePDQ prompts the user to choose another password before any other work can be done. This way only the person assigned the userid knows the password.



Your password must be reset. Please enter a new password below.

User ID	jotest
New Password	<input type="password"/>
Confirm Password	<input type="password"/>
Password Hint	<input type="text"/>

IMPORTANT - If you have elected to use the ePDQ Cardholder Payment Interface (CPI) to submit transactions to the ePDQ engine, you must allocate a user to perform the basic transaction requests.

If you have enabled the password security policy within your ePDQ store you must ensure that the specific CPI user and password never expires. Always select the *'Password never expires'* option to avoid this user and password expiring.

This user will be required for the "behind the scenes" transaction processing performed by the CPI and must be maintained at all times (it must not be deleted or modified).

A Basic Access	Set Up or Amend Password Security Policy	CPI MPI Lite
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To set the User Security Policy

1. After you have logged into the store, click **Administration** from the top four options.
2. Select **Security Policy** from the menu on the left. The **User and Password Expiration Policy** screen is displayed.
3. Select the Policy options that are appropriate for your own security policy then select **Apply these changes**.
4. The Policy will now apply to all Users within your ePDQ store

Once the security policy has been applied you may want to amend the policy of a specific user e.g. You may have allocated a user specific for transaction processing with the ePDQ Cardholder Payment Interface and this user profile should never expire.

To amend the security policy for a specific user

1. After you have logged into the store, click **Administration** from the top four options.
2. Select **Users** from the menu on the left. The **User List** is displayed.
3. Select the User profile and then select update. The **Update User** screen is displayed.
4. Apply the relevant changes e.g. select **Password never expires** then select update.
5. The changes will be applied and you will return to the **User list**.

Important – If you are creating a new password we recommend that you do not use the option to '**Allow the system to create the password**'

Section	Topic	Products
A Basic Access	Default Roles	CPI MPI Lite

Main Document Reference	None
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As the roles based permission functionality of ePDQ is complex, we have set up four standard roles for your use in the store admin. When we first set up your store, we will allocate you a user that has been allocated the “ePDQ Level 4” role.

The details of the recommend store admin roles are provided below.

ePDQ Level 1

- Log in to your ePDQ store.
- Submit sales transactions only. Refund and Void are not permitted.
- View Orders & Periodic Billing Reports only. This will be read only access.

ePDQ Level 2

- Log in to your ePDQ store.
- Submit all transaction types (including refunds and voids).
- View Orders, Periodic Billing, Current Batch, Settlement and Transaction reports. These will be read only.

ePDQ Level 3

- Log in to your ePDQ store.
- Amend digital receipt configuration.
- View Fraudshield, Orders, Periodic Billing, Current Batch, Settlement, Items, Roles and Transaction reports.

ePDQ Level 4

This role is capable of all permissions associated with previous roles and has overall administrative access to your store. This is the default role provided with your initial user.

- Log into your ePDQ store.
- Amend digital receipt configuration.
- Allocate roles to users and unlock users.
- Security policy password management
- View all reports.
- Activate, deactivate and add new strategy rules.
- Perform all transaction types.

Section	Topic	Products
A Basic Access	Adding a New User	CPI MPI Lite

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When you add a new user to your store, the most important consideration is which role profile you wish to assign to the user. You may wish to consider restricting access to your store for particular members of staff. This is useful to ensure that no confidential or company sensitive data is accessed by an unauthorised user.

The role profiles and permissions are detailed earlier in this Section.

Follow the procedure below to add a new user to your ePDQ store.

1. From the **User Configuration Page** (as shown in "Controlling Access to your Store), select **Add**.
2. The **Add User** page will be displayed. Enter the details as required. Mandatory fields are marked with *.
 - The **User ID** must be at least 8 alpha/numeric characters and can be up to 32 characters. It must not contain any special characters (such as *,/, \, _ , -).
 - The **Password** must be at least 8 alpha/numeric characters and must not contain any special characters.
 - Enter the **Password** again for validation purposes.
 - Enter a **Password Prompt**. This must not be your password and must not compromise the password (i.e. "same as user ID").
 - **Password never expires** is optional if the password security policy is enabled within your ePDQ store. Always select this if the password is going to be used for the integration of ePDQ.
 - **Account Name** and **Account Description** are optional, and can be used to identify a user, or store (i.e. Northampton Store).
 - The **Role** is the level of permissions you wish to assign to the user. Use the drop down list to select an appropriate role.
 - Set **Pagination** size according to how much data you wish to have displayed on each page.
3. You can elect for an email to be sent to the user (or an alternative recipient) confirming set up of the new user.
4. Once you have entered all the details correctly, select **Add**. If you have entered any details incorrectly and wish to clear all fields, select **Reset**.
5. The new user will now be created, and can be viewed from the **User Configuration Page**.

IMPORTANT! Please remember that the functionality described in this document may not be available to all users. The role assigned to them may prohibit access to certain functionality. Please ensure you and your staff are familiar with your role privileges.

Section	Topic	Products
A Basic Access	Setting Users for the CPI	CPI

Main Document Reference	None
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If you have elected to use the ePDQ CPI to submit transactions to the ePDQ engine, you must allocate a user to perform the basic transaction requests. This user will be required for the "behind the scenes" transaction processing performed by the CPI and must be maintained at all times (it must not be deleted or modified).

We have created a specific role that can be allocated to the CPI user.

You may task your web developer to integrate ePDQ on your behalf. If this is the case, you can arrange for the web developers user ID to be allocated the specific CPI role. This will enable the web developer to incorporate the user into the CPI configuration to perform transaction tasks, but will not allow that developer wider access to your ePDQ store admin once live.

To set up a specific CPI user you should create a new user following the procedure described on the previous page and allocate the role of "CPI Access".

The CPI Access Role allows:

- Connection to the ePDQ engine.
- Transaction processing for Auth, PreAuth and Periodic Billing.
- Configuration of strategy rules.

You are now able to assign this user ID to the ePDQ CPI. Full instructions on how to do this are provided in the ePDQ CPI Mandatory Requirements document.

IMPORTANT - If you have enabled the password security policy within your ePDQ store you must ensure that the specific CPI user and password never expires. Always select the 'Password never expires' option to avoid this user and password expiring.