



Security Services Administration Guide

Tax Reporting Online

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INTRODUCTION

The purpose of the *Security Services Administration Guide* for Tax Reporting Online (TRO) is to assist Client Masters and/or Client Administrators with the setup and administrative management of users for website access to authorized products, services, or applications. This guide provides general information on site features as well as procedures for performing administrative functions through Netsecure and the Security Services Administration application.

General Overview

One company-appointed Client Master is set up by ADP, and one or more Client Administrators (per company) is set up by the Client Master. Client Administrators typically handle the administrative tasks for users. During the setup through Netsecure, your company's Administrator assigns the profile, and the system issues a digital certificate to the designated user.

To complete the process, the Client Administrator must also access the Security Services Administration application through Tax Reporting Online and assign/authorize users with specific roles and entitlements to access products, services, or applications.

An enrollment e-mail is sent to the user with instructions for registering and downloading the digital certificate. The user registers, creates a password, and downloads the digital certificate to their computer. With the registered digital certificate, the user now has a secure single point of entry to access Netsecure and authorized products, services, or applications.

Security Tips

- ◆ Use caution when making decisions about user authorizations. User administrative or application roles as well as entitlement decisions should come from management.
- ◆ Never share your password with anyone or make it easy for someone to guess.
- ◆ Keep your account active. User accounts without a login for 180 days or more will have their ADPFACS product profile access removed.

System Requirements

Microsoft Windows¹ XP Professional, Windows Vista, or Windows 7 (MAC operating systems are not supported.)

- ◆ Internet Explorer¹ Version 7, or 8 set to accept third party cookies or Firefox 3.5 or higher
- ◆ Adobe Acrobat Reader² 5.0 or higher
- ◆ Browser Security set to Medium with JavaScript, ActiveX controls, and plug-ins enabled
- ◆ (JRE 1.5.0* or higher for Java³ Applet functionality)
*If your workstation does not meet the minimum Java Runtime Environment (JRE) 1.5.0 requirement, please contact your internal workstation support department. Your support person can visit the following Website to download the necessary JRE:
<http://www.oracle.com/technetwork/java/javase/downloads/index.html>
- ◆ 640 x 480, 256-color screen resolution or higher
- ◆ 56K modem or higher (DSL/Cable, T1 line, ISDN recommended)

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² Adobe® Acrobat® Reader® are trademarks of Adobe Systems Incorporated

³ Oracle and Java are registered trademarks of Oracle and/or its affiliates

Important Administrator Terms

The following terms are used when addressing roles and functions within the Netsecure Website and the Security Services Administration application.

Term	Definition
Digital Certificate	Issued by a certificate authority (CA), a digital certificate is an electronic credential that authenticates a user on the Internet and/or Intranet. Digital certificates ensure the legitimate online transfer of confidential information, money, or other sensitive materials by means of public encryption technology.
Password Policy	Passwords must be a minimum of eight alpha/numeric characters with at least one numeric. Passwords are case sensitive and all special characters on a standard keyboard are acceptable. Passwords must not contain the word "password," a user's user ID, full SSN/EIN, full last name, or more than four sequential characters in a row. You cannot reuse your previous four passwords.
Role Authorizations	<p>A role that determines what the user may access. The roles and their appropriate permissions are listed below.</p> <p>Client Admin – User with Security Administrator access to create and update additional company user's access to Security Services Administration application.</p> <p>External Viewer – User who has access to view security information only.</p> <p>Client User – User who has access to all tax reports on Tax Reporting Online.</p>
Secret Question and Answer	A security question and answer created to enroll for the Netsecure digital certificate registration. Answers must be at least four characters long, excluding special characters. The answer may not have four or more sequential or identical characters in a row.
Client Master	Allowed to create, modify, and delete users; create an application role; modify passwords; generate all reports; and assign and remove users to/from the administrative role. A Client Master can only be set up by ADP.
Security Role	<p>Product User – User who has access to various applications and reports but does not have any administrative rights</p> <p>Client Admin – User with permission to add, change, and delete User IDs.</p>
User Application Report	A report that displays assigned roles and authorization levels. Report includes date of assignment.
User Company Report	Displays all assigned roles and authorization levels for all company site IDs.
User ID	A unique name that allows a user to log on to ADP Internet Services.
User Profile	The user access set up for various products or selections on Netsecure or Security Services Administration.

NETSECURE WEBSITE

The Netsecure Website is initially used by the Client Master and/or Client Administrator to set up users with digital certificates to access authorized ADP Internet Services. Netsecure also functions as an administrative management tool where you can delete users, modify profiles, reissue digital certificates, reset passwords, and obtain reports. Product users only have Netsecure access to manage their personal contact information, security questions and answers, and change their password.

Registration

ADP will set up one Client Master for your company. If you are the Client Master, please provide the same registration enrollment information to your ADP Solution Center Consultant that you will request from your company's users. The setup steps are the same for all users.

The Client Master should first set up one or more Client Administrators who can also manage users and maintain the database. A Client Administrator can be considered a back-up in the absence of the Client Master; or for some, Client Administrators are responsible for setting up and managing users as needed. The Client Master or Client Administrators are authorized to add/delete users, modify profiles, reset passwords, and reissue digital certificates.

NOTE: A Client Master can set up Client Administrators, but Client Administrators cannot set up another Client Master or Client Administrator. If your company requires more than one Client Master, contact your ADP Solution Center Consultant.

The following information is required to set up users and issue digital certificates through Netsecure:

- ◆ First and last name
- ◆ E-mail address
- ◆ Work telephone number, if different from the main company phone number
- ◆ Work address, if different from the main company address
- ◆ Security question and answer

Please answer **one** of the following questions. This will be used during your online registration as an additional level of security. Answers must be at least four characters long, excluding special characters. The answer may not have four or more sequential or identical characters in a row.

1. What was your childhood nickname that most people do not know?
2. In what city was your mother born? (Enter full name of city only)
3. In what city was your father born? (Enter full name of city only)
4. What is the first and last name of your childhood best friend?
5. What is the first and last name of your maternal grandfather? (Your mother's father)
6. What is the first and last name of your paternal grandfather? (Your father's father)
7. What was the name of your first pet?
8. What was the first and last name of your maid/matron of honor at your wedding?

9. What was the first and last name of your best man at your wedding?
10. What is the first and last name of your oldest niece?
11. What is the first and last name of your oldest nephew?
12. What was the first and last name of your first manager?
13. What was the first and last name of your first girlfriend/boyfriend?
14. What was the last name of your favorite teacher in your final year of school?
15. What was the first concert you attended?
16. What was the first foreign country you visited?

◆ What profiles will be assigned?

Once a user is set up, a confirmation message containing the User ID, Access Code, and the URL for registering to download a digital certificate will arrive via e-mail. The user will use the e-mail instructions to register and download the digital certificate to their computer, which is required to access Netsecure and authorized products, services, or applications.

For users who are not Client Masters or Client Administrators, refer to the *Tax Reporting Online User's Guide*.

Register a Digital Certificate

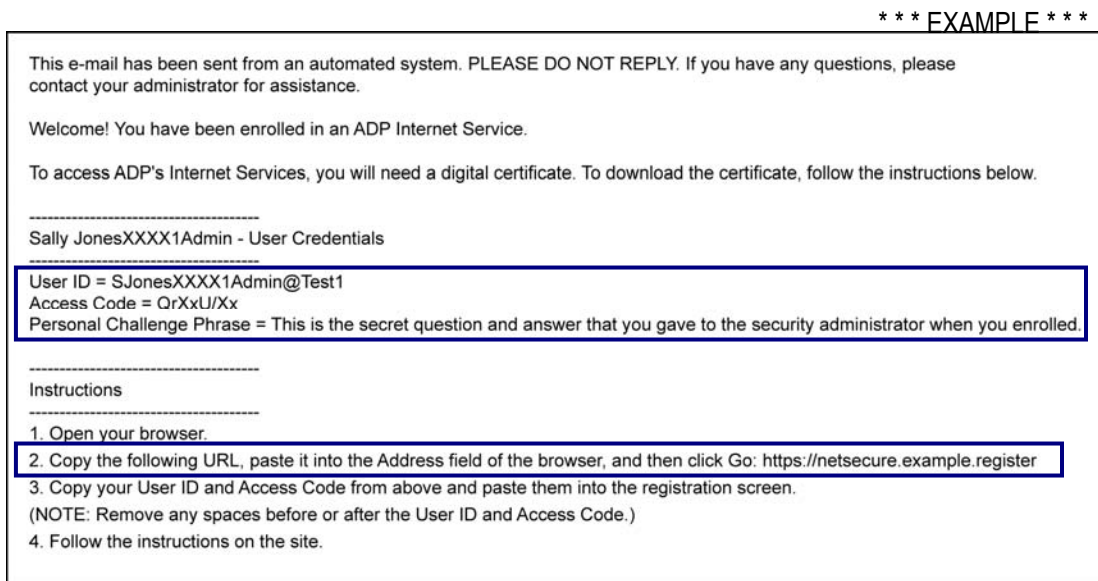
Digital certificates authenticate the user each time an authorized ADP Internet Services site is accessed.

After you have been set up through Netsecure, an e-mail is sent to you with instructions to register and download the digital certificate to your computer. The digital certificate will only need to be downloaded once to your computer before you can log in to Netsecure or Tax Reporting Online for the first time. You can only access authorized sites on this computer with your digital certificate.

The digital certificate is valid for two years. An e-mail notification is sent to you 60 days before the expiration date with instructions for renewing the digital certificate.

NOTE: If this computer is shared by users, more than one digital certificate can be downloaded to the same computer.

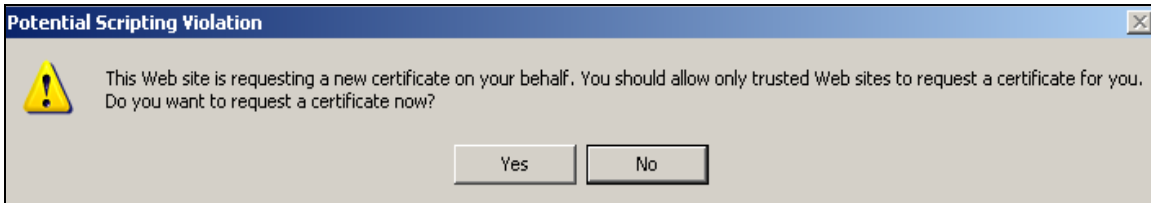
1. Open the e-mail received from ADP Internet Services.



2. Select and **Copy** the URL from the e-mail and **Paste** it into the browser Address field. Click **Go**.



- The following Potential Scripting Violation may display. Click **Yes** to continue.



IMPORTANT! If alert dialog boxes display during this process due to the digital certificate, click **Yes** in all instances to proceed.

- The Register for ADP Services page displays. **Copy** the User ID and Access Code from the confirmation e-mail and **Paste** each in the applicable fields on the registration page. Make sure you do not copy any extra spaces. Click **Submit**.

- Select the designated security question and enter the answer that you provided for enrollment. Click **Submit**.

6. Enter a new password for your account. Confirm the password in the next field.

Password rules are as follows:

- Passwords must be a minimum of eight alpha/numeric characters with at least one numeric. Passwords are case sensitive and all special characters on a standard keyboard are acceptable.
- Passwords must not contain the word “password,” a user’s user ID, full SSN/EIN, full last name, or more than four sequential characters in a row.
- You cannot reuse your previous four passwords.

For added security, your password will expire after six months. When your password expires, you will be prompted to create a new password when you log in. Your new password will be effective immediately.

ADP

Register for ADP Services

ADP is committed to protecting your privacy and ensuring that only you can access your information. We ask for some information so we can confirm that you are the individual you claim to be. Only then we can allow you to access your ADP services. Administrators will be prompted to download their digital certificate.

▶ = required

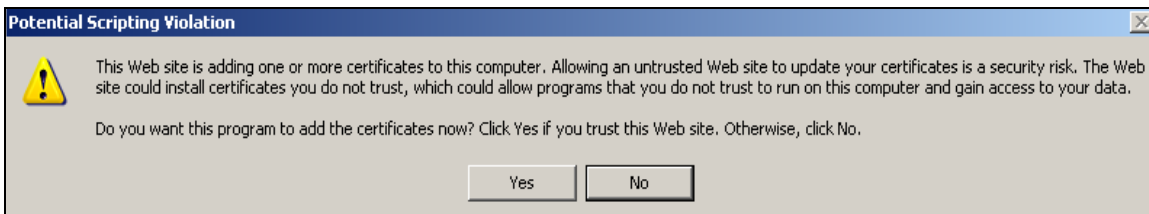
▪ Create Your Password

Passwords must be at least 8 characters long and must contain at least 1 letter and 1 number. Passwords are case sensitive. It is recommended that passwords be 12 or more characters, contain a mix of upper- and lowercase letters, numbers, and/or contain special characters. Important: Do not use user ID, name, or other personal information. Do not store your password on paper or in electronic format. Remember to change it frequently.

New Password :

Confirm Password:

7. Click **Submit**.
8. A Potential Scripting Violation dialog box may display. Click **Yes**.



9. The ADP Digital Certificate Download Process page displays. Read the information and complete the tasks as applicable. Click **Download Certificate** to download your digital certificate. (The example shown below may differ slightly. Additional operating system or internet browser procedures are available in the Digital Certificate Download Quick Reference Card.)

NOTE: If you need additional information for downloading your digital certificate, please click the **Digital Certificate Download Quick Reference Card** link on this page to access the document.

ADP

ADP Digital Certificate Download Process

During this process, you will receive a few security alerts while downloading your digital certificate. When prompted consider ADP to be a trusted website and click **Yes** to continue the process to add the certificate to your machine.

▪ **Install ActiveX**

Depending on your computer setup, you may see a warning message in the Information Bar.

To display the hidden contents of the page, do the following:

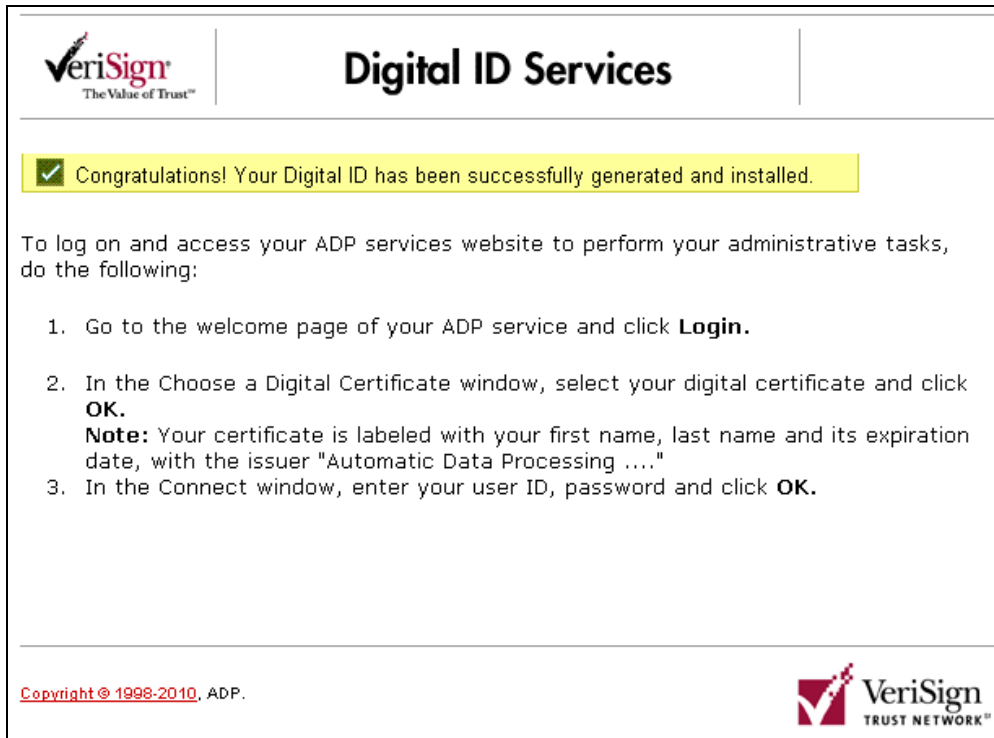
1. Click on the **warning message** in the Information Bar.
2. Click the Allow **Blocked Content** option.
3. In the Security Warning window, click **Yes**.

Complete the tasks listed on this page and click **Download Certificate** to begin downloading your digital certificate.

Important: The digital certificate permits access only on the computer where it is installed. If you expect to access ADP services from a different computer, then follow the instructions to export and import the digital certificate. Refer to the [Digital Certificate Download Quick Reference Card](#)

Download Certificate

10. A confirmation message displays. You are now ready to access Netsecure and authorized products, services, or applications. Close the window to exit.



Account Inactivity

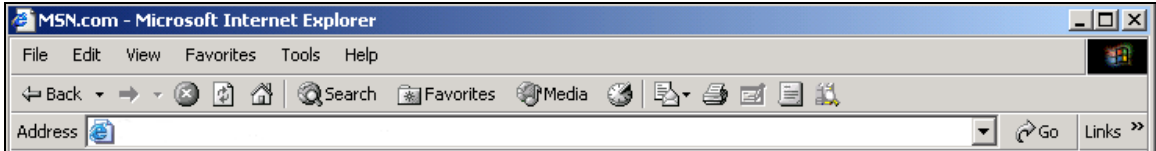
Keep your account active. Accounts are audited by ADP Data Security for inactivity to Tax Reporting Online (Product Profile: ADPFACS). During these audits, user accounts without a login for 180 days or more will be reviewed for deactivation. Deactivation may delete the user account completely if ADPFACS is the only product assigned. If more than one ADP product is assigned to the user account, the ADPFACS product assignment is removed, the user account remains active, and other product assignments will not be affected.

If access to Tax Reporting Online is required at a later date, user accounts that have been deleted must be setup as new by the Client Administrator. For active Netsecure user accounts that the ADPFACS product assignment was removed, the Client Administrator can access the Netsecure Website to add the product back to the Assigned Profiles for the user. (See the Add or Remove Profiles section for details.) If the Client Administrator is unavailable or additional assistance is required, please contact your ADP Solution Center Consultant.

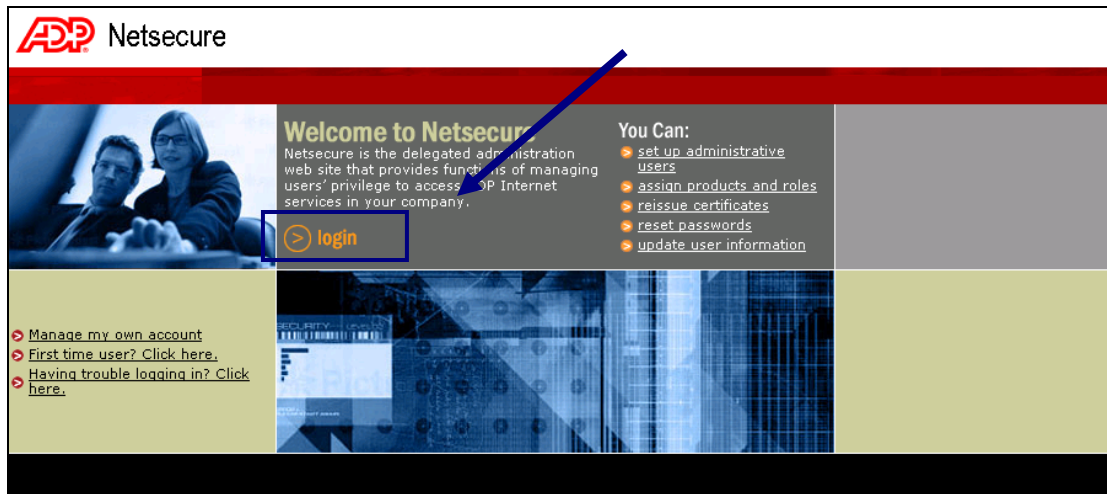
Access Netsecure

The Netsecure Website provides administrative functions to manage ADP Internet services for company users. Information in this section provides a basic overview of commonly used functions. More detailed information to assist you can be found in the job aids provided on the Netsecure Website through the Resources link located on the Homepage.

To access Netsecure, enter <https://netsecure.adp.com> into the browser Address field. Click **Go**.



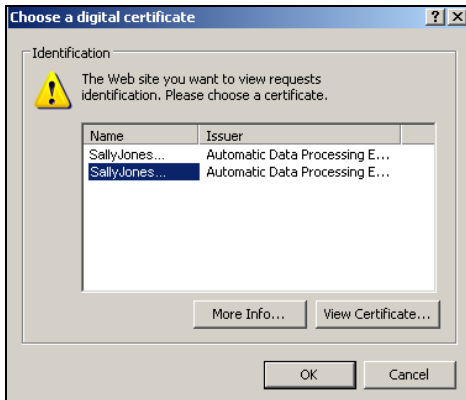
1. From the Welcome page, click the **login** link.



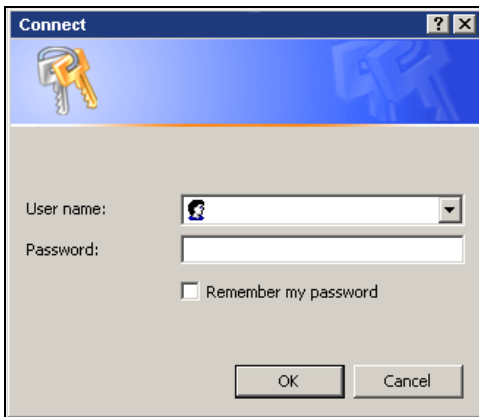
2. A Security Alert dialog box may display. Click **Yes** to continue.



- An identification dialog box displays and lists any digital certificates on this computer. Click to highlight the appropriate digital certificate, and click **OK**.



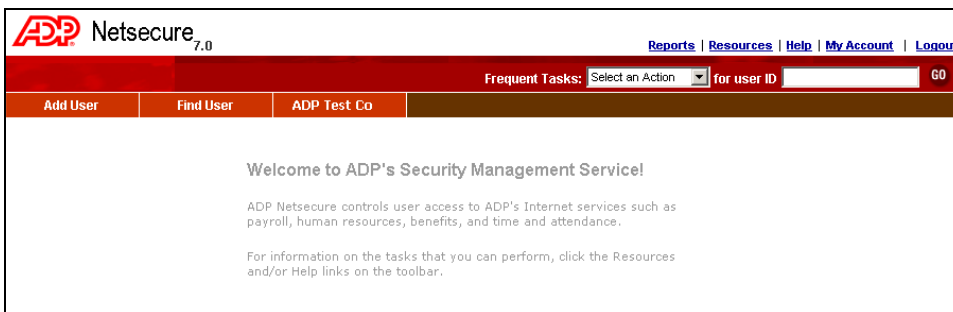
- A connection dialog box displays. Enter your **User Name** and **Password**.



- User Name is the User ID that you copied to the ADP Internet Administrator Registration from the confirmation e-mail.
- Password is the password that you created and confirmed on the ADP Internet Administrator Registration.

NOTE: For additional security, the choice to “Remember my password” is not an available option.

- Click **OK**. The Netsecure homepage displays.

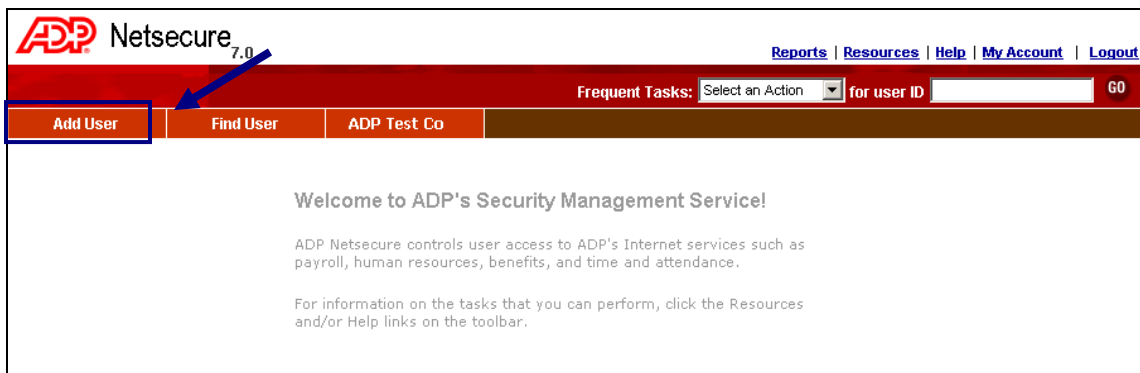


Set Up a New User

The Client Master first sets up one or more Client Administrators for assistance with managing users and/or for back-up purposes. Thereafter, the same process is used to set up each additional user. (ADP is processing a version conversion; the examples shown may differ slightly depending on the Netsecure version installed.)

IMPORTANT! The steps described in this section to add a user includes a temporary migration link to the Security Services Administration application; however, the Security Services Administration application is usually accessed directly through Tax Reporting Online.

1. To set up a new user, click **Add User** from the Netsecure homepage.



2. The Add User > Enter User Info page displays. Enter the first name, last name, and email address of the new user in the appropriate fields.
3. Select **None**.
4. Click **Next**.

5. Select the following **User Type**:
 - User is an independent contractor, consultant, offshore associate or another type of person and will not be included in your ADP services.
6. Select one of the following for the **User Role**:
 - **Product User** – Use this role to set up users who will work with various applications, but will not have administrative rights.
 - **Security Administrator** – Use this role to set up additional users or as an administrative back-up.

NOTE: The User Admin or User Master role is for Self-Service Users only. Do not select these roles for ADPFACS products.

The screenshot shows the 'Add User' web interface. At the top, there are navigation tabs: 'Add User' (selected), 'Find User', and 'ADP Test Co'. Below the tabs, the page title is 'Add User'. A breadcrumb trail shows: '> Enter User Info > Select User Settings > Set Security Q&A'. The form contains the following fields and options:

- Name:** Jackson, Jim
- Email Address:** jim_jackson@Test.com
- * = Required**
- *User Type:**
 - User will be included in your ADP services.
 - User is an independent contractor, consultant, offshore associate or another type of person and will not be included in your ADP services.
- *User Role:**
 - Product User:** User can be assigned profiles to administer ADP services such as Payroll, Human Resources, Benefits, etc. User cannot perform security tasks in ADP Netsecure.
 - User Admin:** User can perform limited security tasks such as reset passwords, reissue digital certificates, suspend or activate self-service users.
 - User Master:** User can assign the user administrator role and perform all the tasks of the user administrator. In addition, user can issue/reissue personal identification code, modify self-service user information and approve/deny self-service users registering before their information is available to ADP (if available to your company).
 - Security Admin:** User can create user masters, user administrators, and product users. User can reset passwords, reissue digital certificates in ADP Netsecure and be assigned profiles to administer ADP services.

At the bottom of the form, there are three buttons: '<<Back', 'Next>>', and 'Cancel'.

7. Click **Next**. The View ADP Services User ID page displays.

- Review the name and user ID information. Enter an alternative Email address, if applicable. Select the **Temporary Security Question** and enter the **Temporary Security Answer**. (This question and answer was determined in advance with the new user.)

Add User
Find User
ADP Test Co

Add User

> Enter User Info > Select User Settings > **Set Security Q&A**

Name: Jackson, Jim **Email Address:** jim_jackson@Test.com

View ADP Services User ID

User has been created with the user ID provided below.

User ID: JJackson@Test

An e-mail with the security information and the instruction to access ADP services will be sent to the email address provided below.

Note: To send this e-mail to an alternate e-mail address, enter it in the field below.

Email Address:

Select Security Information

Select the security question and enter the security answer.

Note: Security answer must be at least 4 characters long.

* = required

*** Security Question**

*** Security Answer**

Provide this information to the user immediately and in a secure communication, either in person, by phone or e-mail. User must change this information after logging on to their ADP service.

<<Back

Submit

Cancel

- Click **Submit**. The View User Info page displays.

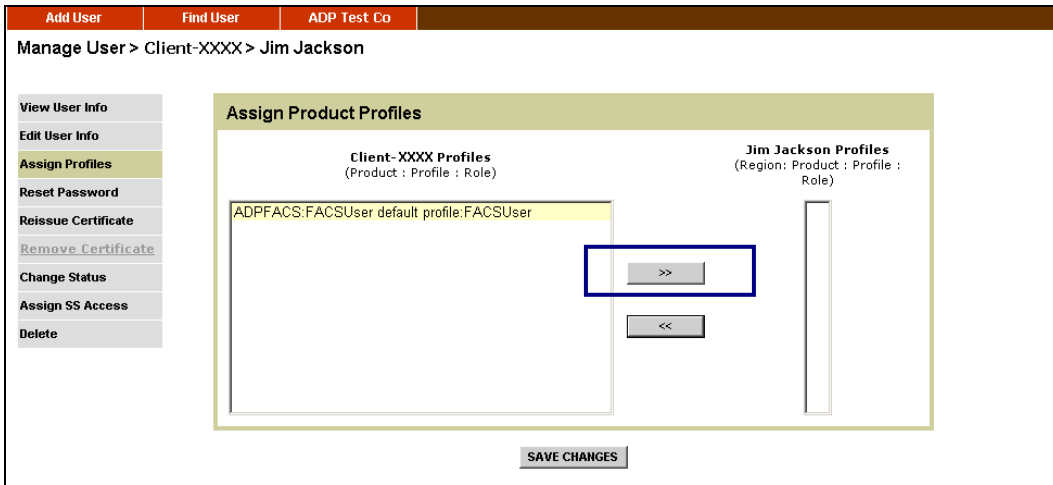
10. A confirmation message displays at the top of the View User Info page. The user has been assigned a digital certificate and will receive an e-mail confirmation message.

To provide administrator access for this user to ADP services, click the **Assign a Profile** link. (This will determine user access.)

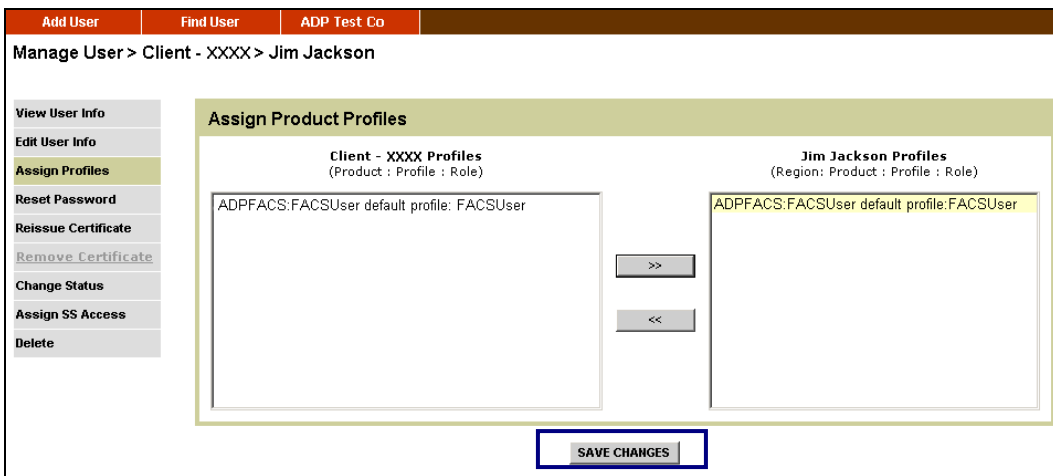
NOTE: This completes the process to issue a digital certificate. Skip the next steps if you are creating this user, but are not ready to assign a profile; however, you must assign a profile for a user to have access.

The screenshot shows the 'View User Info' page for user 'JJackson@Test'. At the top, a yellow confirmation message states: 'Congratulations! The user ID JJackson@Test has been assigned to Jim Jackson. Important: To provide administrator access to your ADP services, [assign a profile](#) to this user.' A blue arrow points to the 'assign a profile' link. Below the message, the user's details are displayed in sections: Personal Info (Name: Jim Jackson, Email: jim_jackson@Test.com, UserID: JJackson@Test), User Settings (Status: Active, User Role: Security Administrator), Security Information (Temporary Security Question: In what town does your nearest sibling live?, Temporary Security Answer: Anytown), Business Address (Country, Business Address 1-3, City/Town, State/Province, Zip/Postal Code), and Additional Info (Note).

- The Assigned Product Profiles page displays. Highlight the selection and click the double arrows button to add the product to the user.

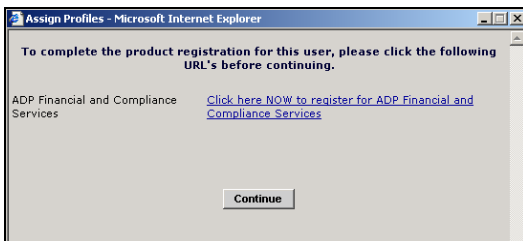


- Continue this process until all applicable profiles have been assigned for this user. Click **Save Changes**.



- If you selected the ADPFACS product, an Assign Profiles dialog box displays. Click the **Click here NOW to register for ADP Financial and Compliance Services** link. This opens a new window to the Security Services Administration application to complete the setup for this user.

If you are not ready to assign the user role authorizations, click **Continue** to return to the Netsecure Website.



Security Services Administration

The setup continues for this user as the Client Master or Client Administrator is directed to the Security Services Administration application.

- If this setup is a current ADPFACS user who is assigned with role authorizations, follow instructions for Step 1 to map the digital certificate to this user.
 - If this setup is for a user who has never been authorized for ADP Internet Services, skip Step 1 and proceed to Step 2.
1. The User Admin – Migration page displays. Enter the **User ID** of this same user who is currently authorized to access Tax Reporting Online. (The User ID entered will be mapped with their existing role authorizations to the new digital certificate that was just issued.)

IMPORTANT! The system may detect the User ID. As a result, one or more possible matches will display on this page. If there is a match, select the user and proceed to Step 2.

User Admin - Migration

ISI Client ID: XXXX

ISI User ID: JJackson@Test

ISI User First Name: Jim

ISI Last Name: Jackson

Please Enter User ID if you want to map to another user.

2. Click **Save**.
3. The User Admin – Add page displays. Basic information from Netsecure automatically populates to the User Admin – Add page. The user should be established based on the task or tasks performed for your company. The following values should be considered:

- **Full SSN** – Select **Yes** to show full social security number on reports. Select **No** to only display the last four digits of the SSN on reports.
- **Full DDA** – Select **Yes** to show full ABA/DDA numbers on reports. Select **No** to only display the last four digits of the ABA/DDAs on reports. (Only users with full DDA entitlement can choose to view unmasked reports.)

User Admin - Add

***** You are adding a new User *****

▶ Indicates required field

User Profile	
ISI Client ID:	XXXX
ISI User ID:	JJackson@Test
First Name:	Jim
Last Name:	Jackson
Email Address:	jim_jackson@Test.com
Full SSN:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Full DDA:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Email Notification:	
Quarter:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Periodic:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Agency Notice:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Amendment/Exception:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Company Code:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Report:	▶ <input type="radio"/> Yes <input checked="" type="radio"/> No

- **E-mail Notifications** – Default is **No**. Select **Yes** to receive Quarter or Periodic e-mail notification of report availability.
 - **Auto Company Code** – Default is **No**. Select **Yes** to enable the user to inherit all of the company codes under its domain.
 - **Auto Report** – Default is **No**. Select **Yes** to enable the user to inherit all of the reports under its domain.
4. Role Authorizations further define the level of user access. Select the roles to be assigned to the user.

Security Services Administration

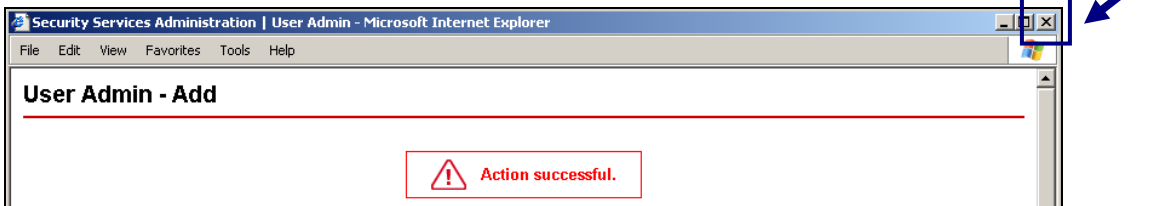
ClientAdmin – User with Security Administrator access to create, maintain, and update additional company user's access to Security Services Administration application.

ExternalViewer – User who has access to view security information only.

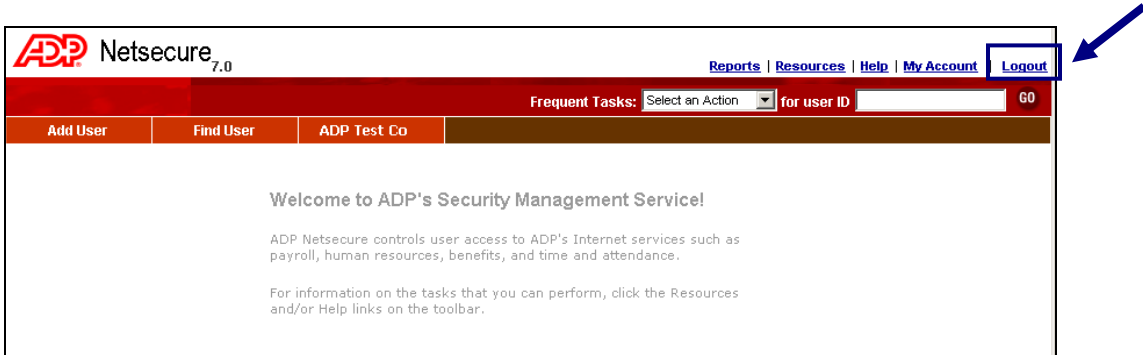
Tax Reporting Online

ClientUser – User who has access to all tax reports on Tax Reporting Online.

5. Once all role assignments are selected, click **Save**.
6. An Action successful message displays. Exit the window to return to the Netsecure Website.



7. Click **Logout** to exit.



Manage Users

The Netsecure Website is an administrative management tool.

Find User

1. From the Netsecure Website, click **Find User**. The Find Users page displays. Select User Name or User ID, and enter all or part of the name or ID. Select an option for the value entered to search (Starts With, Contains, or Exact phrase). Click **Search**.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find Users

Search Tips

User ID: (use * to indicate a wildcard search)
 Status: Active Suspended

User Name:

 First Name: (use * to indicate a wildcard search)

 Last Name: (use * to indicate a wildcard search)

 E-mail Address:

 User Role:

Product Name:

Display: results per page Sort by:

2. The User Results page displays and lists all users found that match your search criteria. Click to select or choose an action.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson, Product Code equals to ADPFACS Return to : [User Search](#)

Choose an action

Check All	Name	User ID	Person ID	Access Type	Role	Status	Organization
<input type="checkbox"/>	Jim Jackson	JJackson@Test		Direct	Client Admin	Active	Client-XXXX

Edit User Information

1. Use the **Find User** feature to display the Find User Results page. Click the **Name** or **User ID** link.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson, Product Code equals to ADPFACS

Return to : [User](#) [Search](#)

ADD NEW USER

Choose an action apply to checked users GO

check All	Name	User ID	Person ID	Access Type	Role	Status	Organization
<input type="checkbox"/>	Jim Jackson	JJackson@Test		Direct	Client Admin	Active	Client-XXXX

2. The View User Info page displays. The menu down the left side of the page contains various links to manage a user. To modify personal information for this user, click **Edit User Info**.

Add User Find User ADP Test Co

Manage User > XXXX > Jim Jackson

View User Info

Edit User Info

Assign Profiles

Reset Password

Reissue Certificate

[Remove Certificate](#)

Change Status

Assign SS Access

Delete

View User Info

Personal Info

Name: Jim Jackson UserID: JJackson@Test

Email: jim_jackson@Test.com

Phone Number:

User Settings

Status: Active

User Role: **Security Admin:** User can create user masters, user administrators, and product users. User can reset passwords, reissue digital certificates in ADP Netsecure and be assigned profiles to administer ADP services.

Security Information

Security Question:

Security Answer:

Business Address

Country:

Business Address 1:

Business Address 2:

Business Address 3:

City/Town:

State/Province:

Zip/Postal Code:

Additional Info

Note:

- On the Edit User Info page, modify the user’s information as needed. Click **Save Changes**.

Manage User > XXXX > Jim Jackson

Edit User Info

To protect your employees' sensitive information, the User Info page does not include all the employee's security information. Employees can use the additional security information to retrieve his/her user ID or password online.

Personal Information

*First name: Jim, MI: [], *Last name: Jackson
 *Email: jim_jackson@Test.com, Phone Number: []
 (Example: +1(416) 555-5555)

User Settings

*Status: Active, Suspended

User Role: Security Admin: User can create user masters, user administrators, and product users. User can reset passwords, reissue digital certificates in ADP Netsecure and be assigned profiles to administer ADP services.

Security Information

Answers must be at least 4 characters, and is not case sensitive.
 Note: Do not change the security question and/or security answer for self service users (created by their administrator) who have not yet registered and administrators who have not downloaded their digital certificate.

*Security Question: In what city was your mother born? (Enter full name of city only), *Security Answer: San Dimas

Business Address

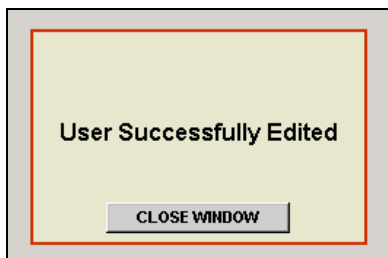
Country: Select a Country
 Business Address 1: [], Business Address 2: [], Business Address 3: []
 City/Town: [], State/Province: [], ZIP/Postal Code: []

Additional Info

Note: []

SAVE CHANGES **CANCEL**

- A confirmation message displays. Click **Close Window**.

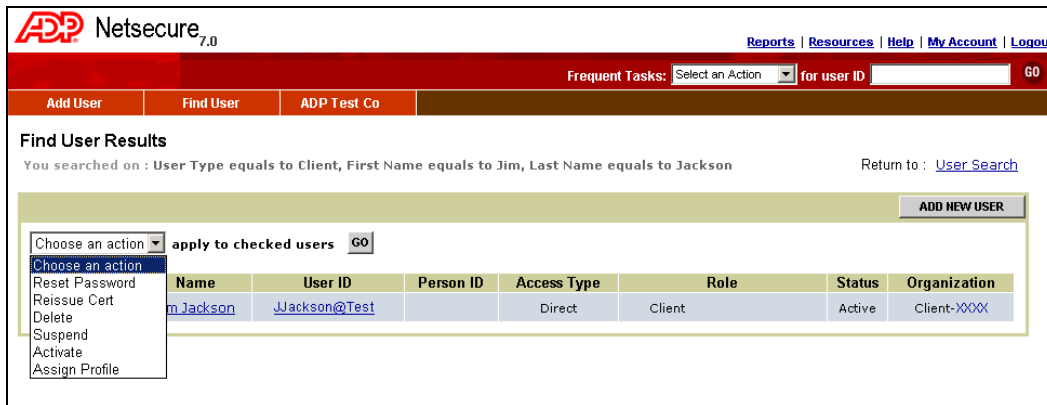


NOTE: If you change a user’s e-mail address, an informational message will be sent to the user’s previous e-mail address.

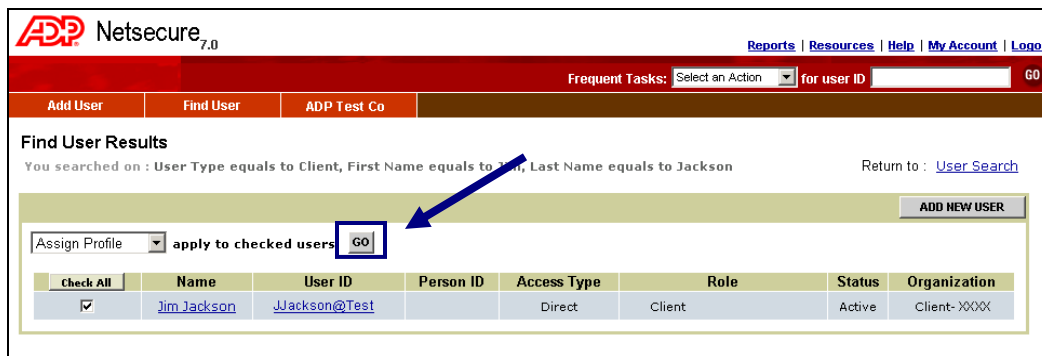
Add or Remove Profiles

Profiles define what ADP product sites the user will be authorized to access. From this option, you can add or remove profile assignments for users.

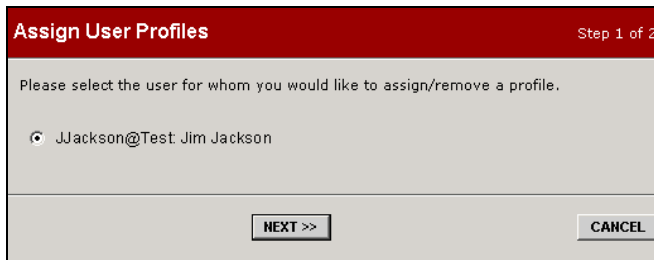
1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed directly from this page. Select **Assign Profile**.



2. To assign a profile, select the user name check box. Click **Go**.



3. Click to select the user. Click **Next**.



- The Assign User Profiles window displays. Highlight the selection and click the double arrows button to add or remove the profile for the user. Once all profile updates have been completed, click **Next**.

Assign User Profiles Step 2 of 2

Assign Product Profiles for

Available Profiles (Region: Product : Profile : Role)	Assigned Profiles (Region: Product : Profile : Role)
ADPFACS:FACSUser default profile:FACSUser	ADPFACS:FACSUser default profile:FACSUser

>>
<<

NEXT >> CANCEL

- A confirmation message displays and confirms that the profile assignment or removal was successful. Click **Continue**.

Profile assign/remove Successful

Assigned Profiles:
adpProfileID= UserProfileName

Continue

Reset a Password

A user will contact their Client Master or Client Administrator to reset their password. A Client Administrator can reset a password for another Client Administrator; however, ADP must reset a password for a Client Master. The process to reset a password is the same for all users.

1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed from this page. Select **Reset Password**.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson Return to : [User Search](#)

ADD NEW USER

Choose an action apply to checked users GO

- Choose an action
- Reset Password
- Reissue Cert
- Delete
- Suspend
- Activate
- Assign Profile

Name	User ID	Person ID	Access Type	Role	Status	Organization
Jim Jackson	JJackson@Test		Direct	Client	Active	Client-XXXX

2. To reset a password, click the user name check box. Click **Go**.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson Return to : [User Search](#)

ADD NEW USER

Reset Password apply to checked users GO

Check All	Name	User ID	Person ID	Access Type	Role	Status	Organization
<input checked="" type="checkbox"/>	Jim Jackson	JJackson@Test		Direct	Client	Active	Client-XXXX

3. A Reset Password message displays. Verify that the user's e-mail address is correct, and click **Reset Password**. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.

Reset Password > Jim Jackson

An Email with a temporary password will be sent to the user at the given e-mail address.
Please confirm the email and click on 'Reset Password'

Name	Email
Jim Jackson	jim_jackson@Test.com

4. A confirmation message displays. Click **Close Window**.

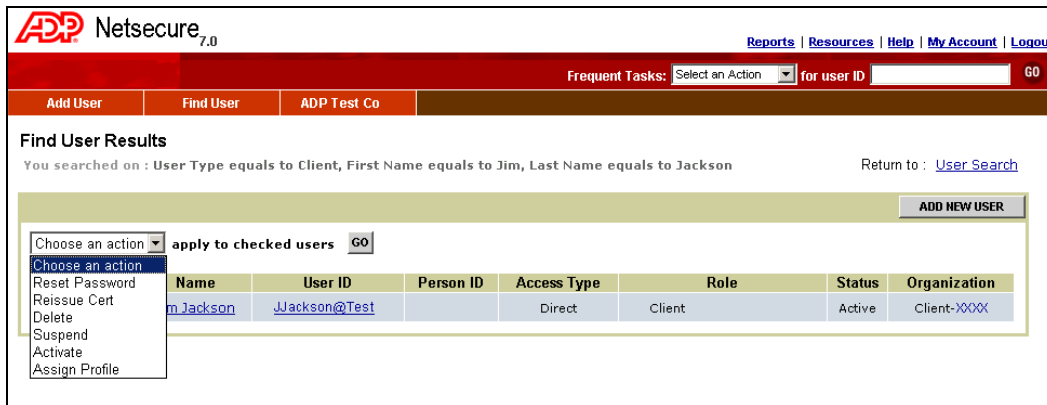
Reset Password has been successfully completed.

A "Confirmation of Change" e-mail message will be sent to the user containing a temporary password. The user must log on and follow the on-screen instructions to change the temporary password. If the user does not receive the temporary password e-mail, please contact your LAN Administrator to ensure that your firewall can accept e-mails from your own company.

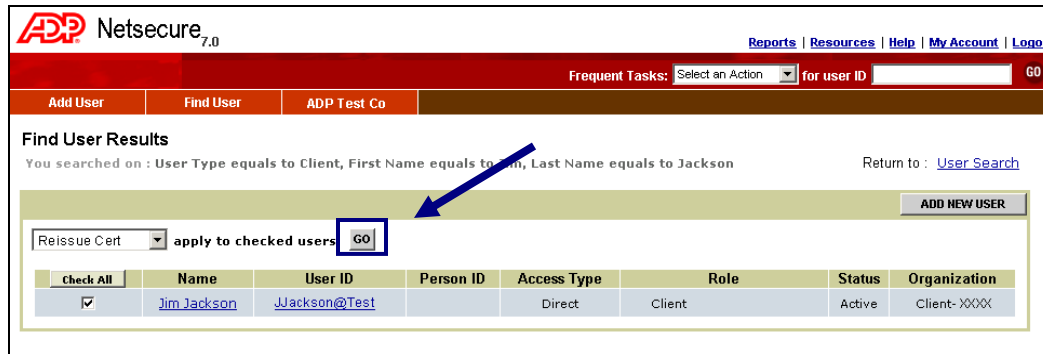
Reissue a Digital Certificate

Situations may occur when a user’s digital certificate needs to be reissued. For example, the user’s computer may have crashed, or the user may have been assigned to another computer.

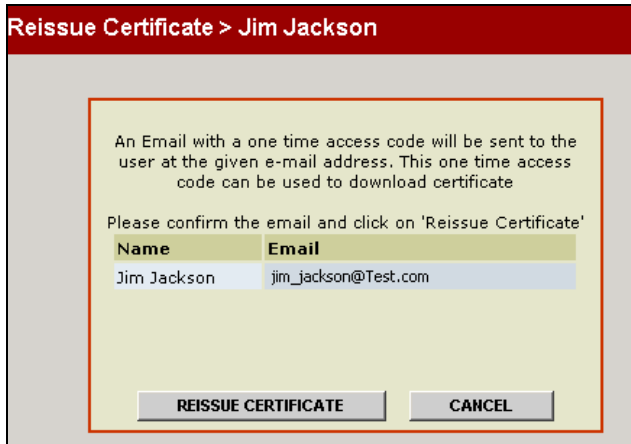
1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed from this page. Select **Reissue Certificate**.



2. To reissue a certificate, click the user name check box. Click **Go**.



3. A Reissue Certificate confirmation message displays. Verify that the user's e-mail address is correct, and click **Reissue Certificate**. An e-mail with instructions for downloading a new certificate will be sent to the user. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.



4. A confirmation message displays. Click **Close Window**.



A "Confirmation of Change" e-mail message will be sent to the user containing the information needed to download the new digital certificate. If the user does not receive the temporary password e-mail, please contact your LAN Administrator to ensure that your firewall can accept e-mails from your own company.

Suspend or Activate a User

A user may need to be suspended due to an extended illness or leave of absence. When the user returns, you must reactivate the user to allow access to ADP Internet Service products.

If a suspended user attempts to log in to Netsecure or an ADP Internet Service product, the user will receive an error message stating that they do not have access to that product.

When a user is reactivated, the user can log in to the products or services that were assigned with their original user ID and password. A reactivated user will not have to repeat the registration process.

1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed from this page. Select **Suspend** or **Activate**.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson Return to : [User Search](#)

ADD NEW USER

Choose an action apply to checked users GO

Name	User ID	Person ID	Access Type	Role	Status	Organization
Jim Jackson	JJackson@Test		Direct	Client	Active	Client-XXXX

2. The status of the user displays in the Status column. To suspend or reactivate a user, click the user name check box. Click **Go**. (The example shown is for Suspend.)

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Find User Results

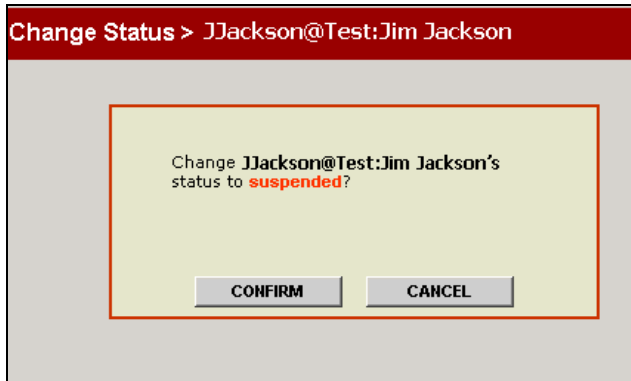
You searched on : User Type equals to Client, First Name equals to Jim, Last Name equals to Jackson Return to : [User Search](#)

ADD NEW USER

Suspend apply to checked users GO

Check All	Name	User ID	Person ID	Access Type	Role	Status	Organization
<input checked="" type="checkbox"/>	Jim Jackson	JJackson@Test		Direct	Client	Active	Client-XXXX

3. A Change Status message displays. Click **Confirm**.



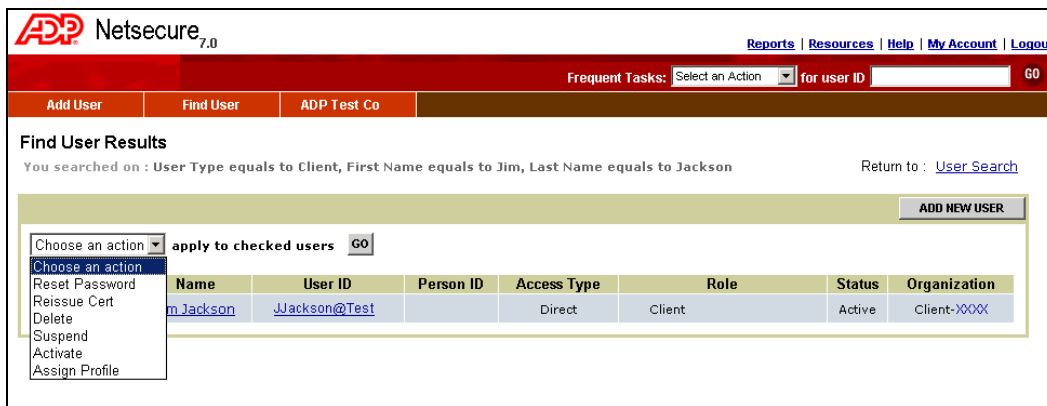
4. A message displays to verify that the user has been suspended. The user's status will update to display the current status. Click **Close Window**.



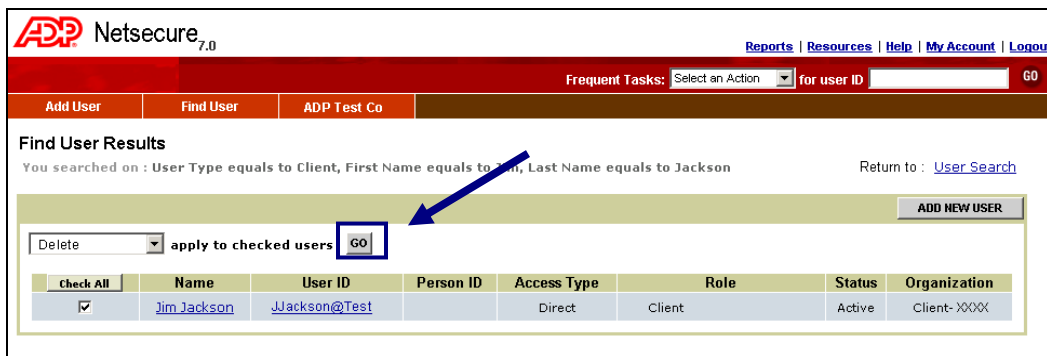
Delete User

The Delete User option allows you to delete a user profile for reasons such as termination or transfer.

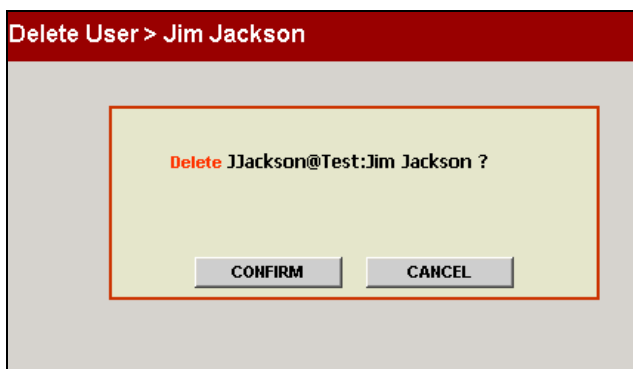
1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed directly from this page. Select **Delete**.



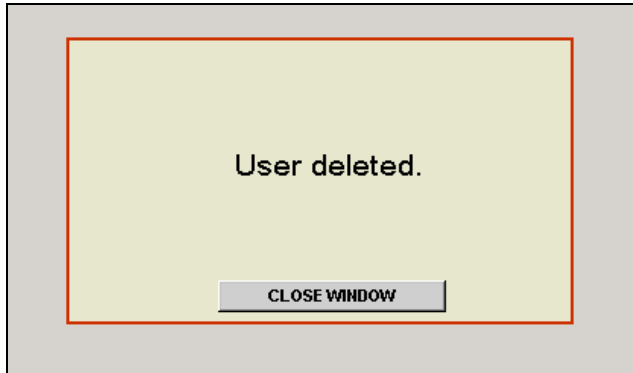
2. To delete a user, select the user name check box. Click **Go**.



3. A Delete User confirmation message displays. Click **Confirm**.



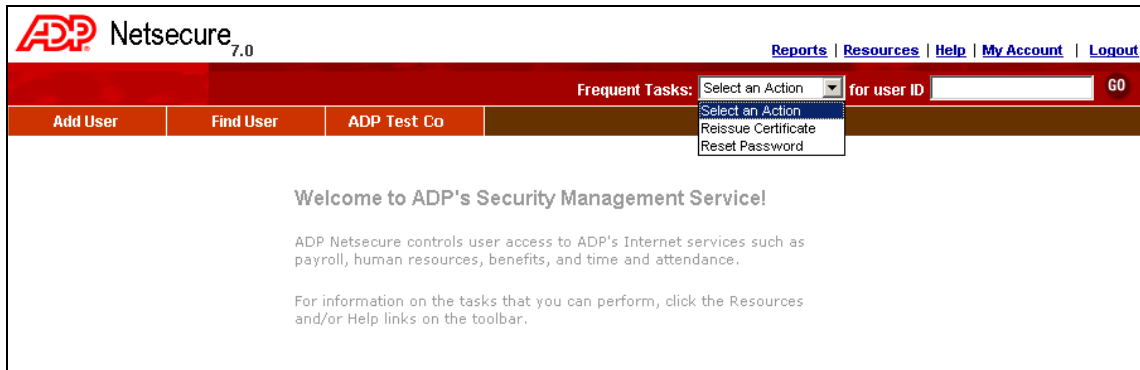
4. A message displays that the user has been deleted. The user's status will be updated on the user page. Click **Close Window**.



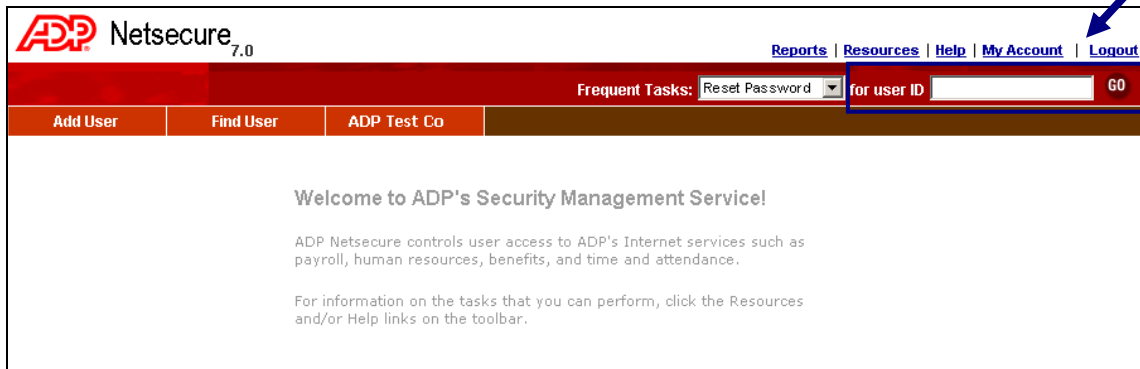
Frequent Tasks

The Frequent Tasks option on the main Netsecure page allows you to quickly reset a password or reissue a certificate. You must have the User ID of the user to process changes using this function.

1. Click the **Frequent Tasks** drop-down arrow to view the menu and select a task. Click **Reissue Certificate** or **Reset Password** to process. (The example shown is Reset Password.)



2. Enter the User ID for the user password to be reset. Click **Go**.



3. A Reset Password message displays. Verify that the user's e-mail address is correct, and click **Reset Password**. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.

Reset Password > Jim Jackson

An Email with a temporary password will be sent to the user at the given e-mail address.
Please confirm the email and click on 'Reset Password'

Name	Email
Jim Jackson	jim_jackson@Test.com

RESET PASSWORD CANCEL

A "Confirmation of Change" e-mail message will be sent to the user containing a temporary password. The user must log on and follow the on-screen instructions to change the temporary password. If the user does not receive the temporary password e-mail, please contact your LAN administrator to ensure that your firewall can accept e-mails from your own company.

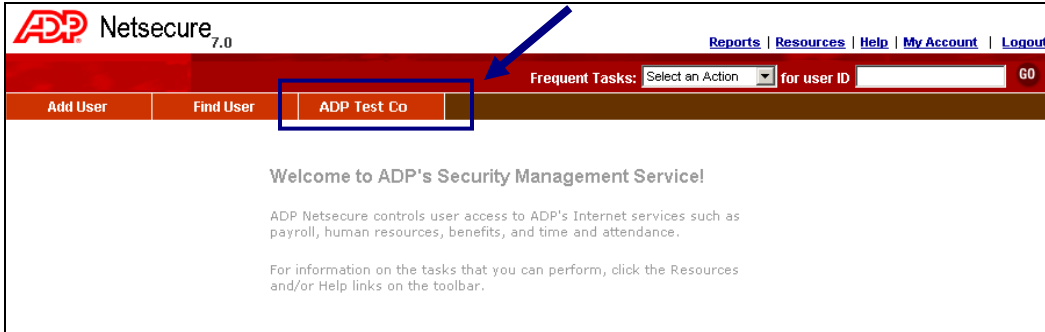
Manage Company Information

Company information can be updated through the Netsecure Website.

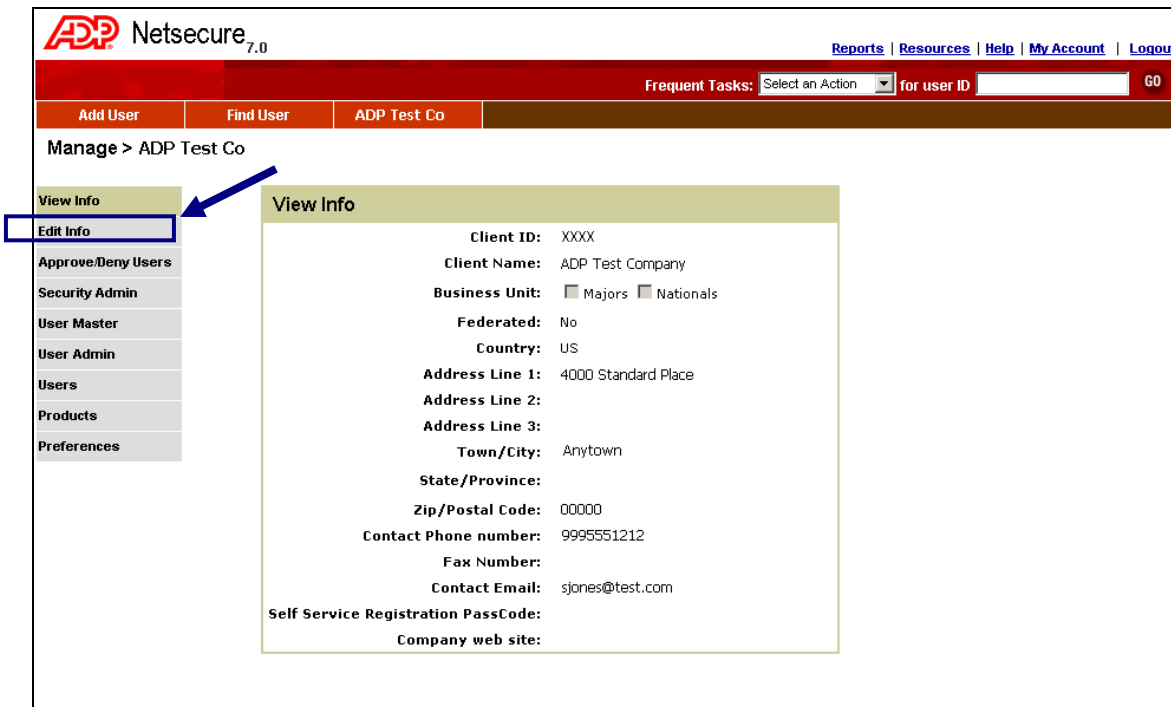
NOTE: Access to manage company information varies by user and/or products.

Edit Company Information

1. Access the Netsecure Welcome page. Click your **Company Name** to display the View Info page.



2. The View Info page displays the basic information for your company including name, address, phone number, and contact e-mail. The menu down the left side of the page contains various links to manage company information. To edit information, click **Edit Info**.



- On the Edit Info page, update basic company information. Click **Save Changes**. If no changes are needed, click **Cancel**.

ADP Netsecure 7.0 [Reports](#) | [Resources](#) | [Help](#) | [My Account](#) | [Logout](#)

Frequent Tasks: for user ID

Manage > ADP Test Co

Edit Info

* = Required Field

* Client ID:

* Client Name:

* Country:

* Address Line 1:

Address Line 2:

Address Line 3:

* Town/City:

* State/Province:

* Zip/Postal Code:

* Contact Phone number:
(Example: +1(416) 555-5555)

Fax Number:

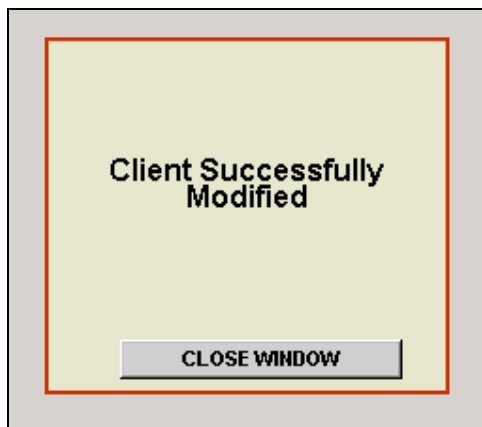
Contact Email:

Self Service Registration PassCode:

NOTE : Self Service Registration PassCode is [Not Set]

Company web site:

- A confirmation message displays. Click **Close Window**.



Manage Company Users

The Approve or Deny Users function may be used when new users are pending.

1. Click your Company Name to access the View Info page. Click **Approve/Deny Users**.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User **ADP Test Co**

Manage > ADP Test Co

View Info
 Edit Info
Approve/Deny Users
 Security Admin
 User Master
 User Admin
 Users
 Products
 Preferences

View Info

Client ID: XXXX
 Client Name: ADP Test Company
 Business Unit: Majors Nationals
 Federated: No
 Country: US
 Address Line 1: 4000 Standard Place
 Address Line 2:
 Address Line 3:
 Town/City: Anytown
 State/Province:
 Zip/Postal Code: 00000
 Contact Phone number: 9995551212
 Fax Number:
 Contact Email: sjones@test.com
 Self Service Registration PassCode:
 Company web site:

2. The Users Pending Approval page displays listing any users that are pending approval. Click the user name check box. Click **Approve** or **Deny** to approve or deny the user access to the Website.

ADP Netsecure 7.0

Reports | Resources | Help | My Account | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Manage > ADP Test Co

View Info
 Edit Info
Approve/Deny Users
 Security Admin
 User Master
 User Admin
 Users
 Products
 Preferences

Users Pending Approval

Select users and click on **Approve** or **Deny** as appropriate. Once the users are approved or denied they will be removed from the list.
Important: You must approve or deny users within 60 days.

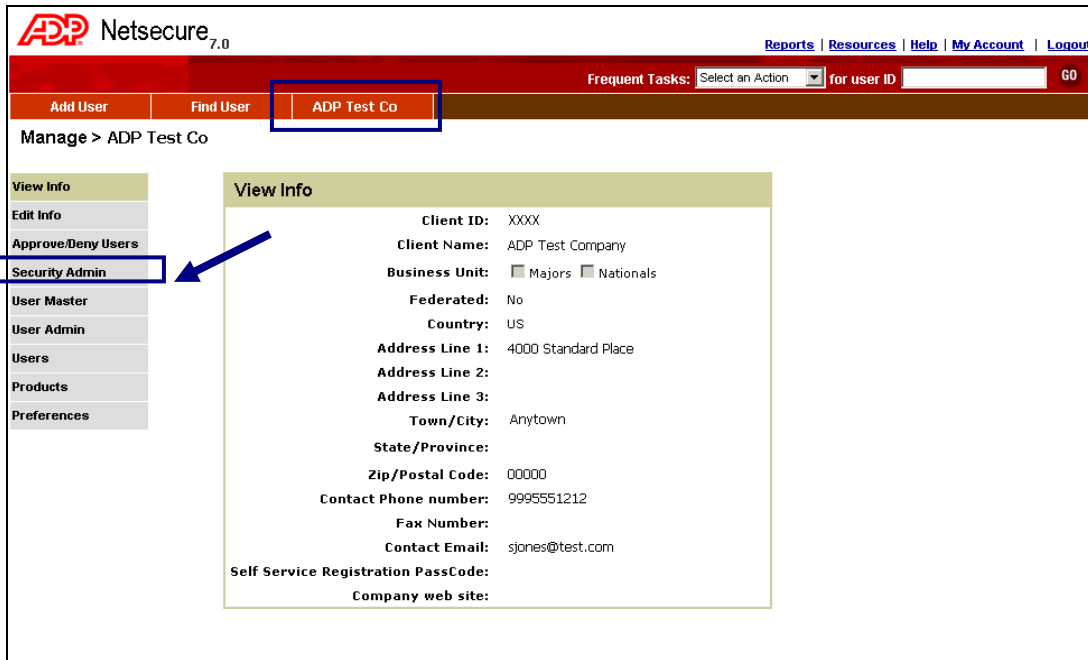
0 Found Display: 10 results per page

<input type="checkbox"/>	User Name	User ID	E-Mail Address	Phone	Product Name	Registration Date
Bold = New user pending approval						

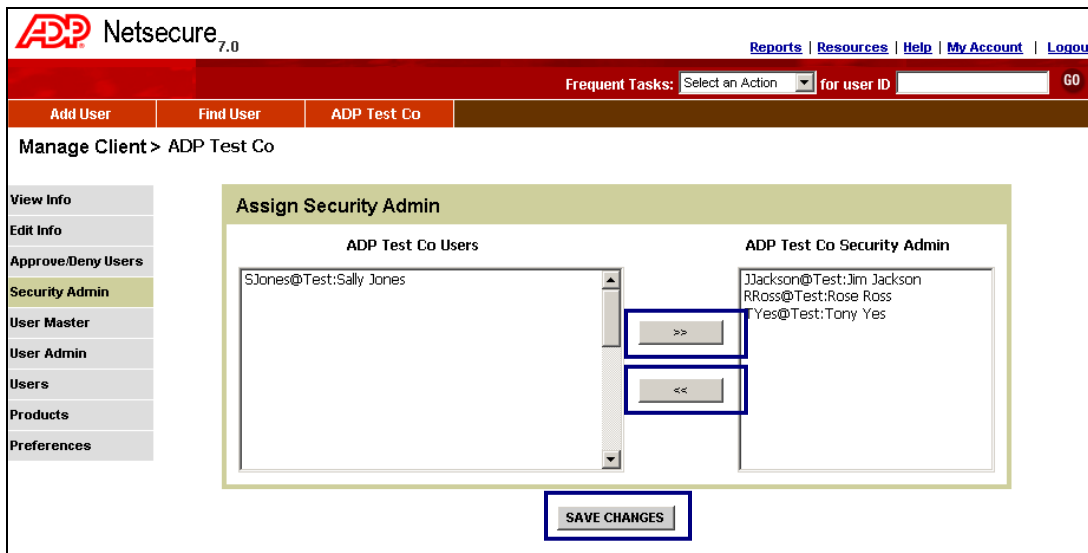
Manage Client Administrators

Manage the assignment or removal of Client Administrators from a list of your company's registered users.

1. Click your Company Name to access the View Info page. Click **Security Admin** to quickly add or remove one or more users to the Client Administrator role.



2. A list of users for your company will display on the left with the current Client Administrators on the right. To add Client Admin users, click to highlight the user name and click the double arrows button to move the name to the Security Admin list. To delete Client Admin users, click to highlight the user name from the listing on the right and use the arrow to move the name over to the left. Click **Save Changes**.



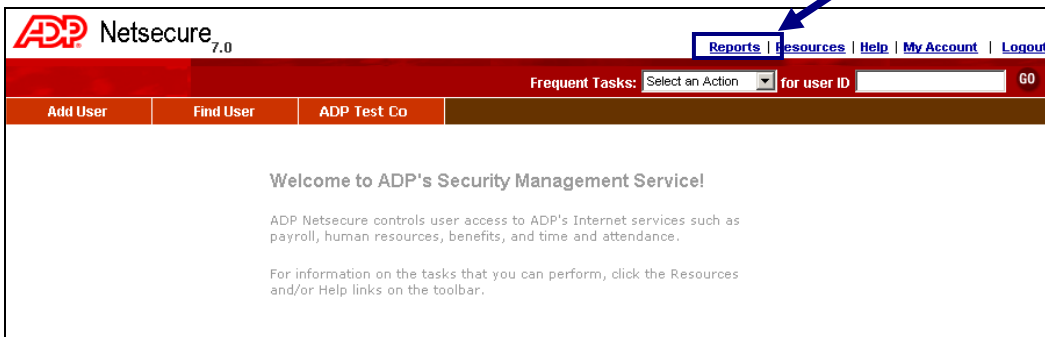
Netsecure Reports

Netsecure Reports are designed to provide information about users registered for ADP Internet Services. Report types include:

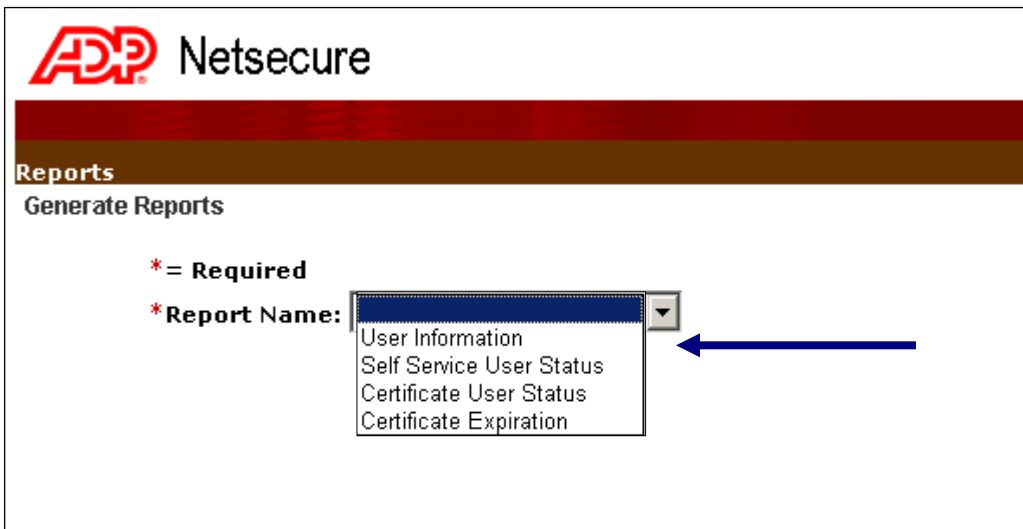
- User Information – Lists basic user information and provides you with the ability to include fields as appropriate for your needs.
- Self Service User Status – Not used at this time.
- Certificate User Status – Lists users and the products associated with the users.
- Certificate Expiration – Lists all certificate expirations for users for a specific time period.

User Information Report

1. Access the Netsecure homepage. Click **Reports**.



2. The ADP Netsecure Reports page displays. Select a **Report Name**.



- Upon selection of the report name, the Generate Reports options display based on the report requested. Select from the following to customize your report:

Sort Options

- Sort On** – Select the field to sort the report. The report can be sorted by User Name, User Status, Security Role, Date created, or Last logon date.

Qualifiers

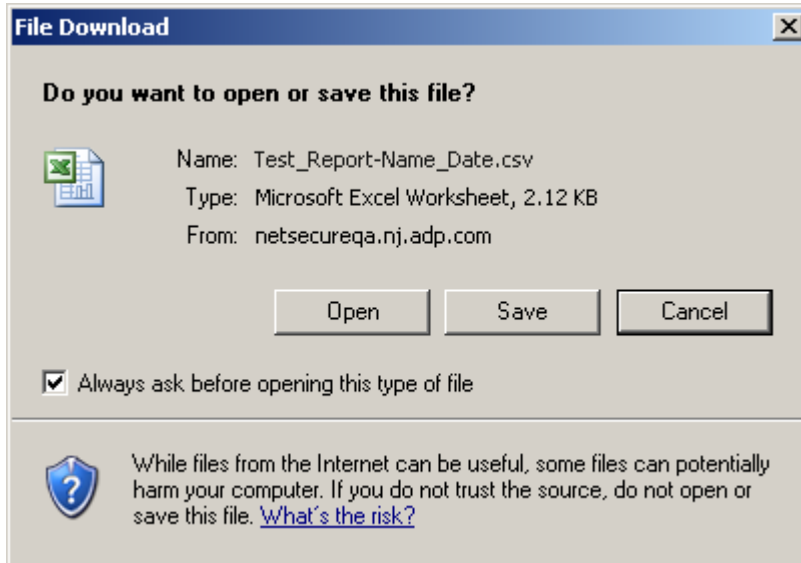
- User Status** – Report can be produced for only active users, only suspended users, or both. To select both, press and hold down the <Ctrl> key while clicking each status.
- Security Roles** – Choose the Security role or roles that you want to include on the report. To select multiple roles, press and hold down the <Ctrl> key while clicking each role.
- Select Fields** – Varies by report (i.e., Span dates)
- Product** – Available Products and Selected Products
- Report Format** – Comma Separated Values (.csv), Portable Document Format (.pdf), or Preview

The screenshot shows the ADP Netsecure Reports interface. At the top, there is a red header with the ADP logo and the word 'Netsecure'. Below this is a section titled 'Reports' with a sub-section 'Generate Reports'. A descriptive text states: 'The Certificate User Status report provides information such as security role, product profile, product role, and authorization code(s) as applicable.'

The configuration options are as follows:

- * = Required**
- *Report Name:** Certificate User Status (dropdown menu)
- Sort on:** User Name (dropdown menu)
- *UserStatus:**
 - Active
 - Suspended
- *Security Roles:**
 - Security Admin User Admin
 - Security Master User Master
 - Product User
- *Product:**
 - Available Products: ADP Financial and Compliance Services
 - Selected Products: ADP Financial and Compliance Services
 - Navigation buttons: >, All >, <, All <
- Report Format:** Comma Separated Values (.csv) (dropdown menu)
- Generate Report** (button)

4. Click **Generate Report** to produce the report in the format requested.
5. A File Download dialog box displays. The file name and type displays. To save a copy of the report on your local computer drive, click **Save**. Navigate to the desired local drive and name your file to save. To open the file, click **Open**.

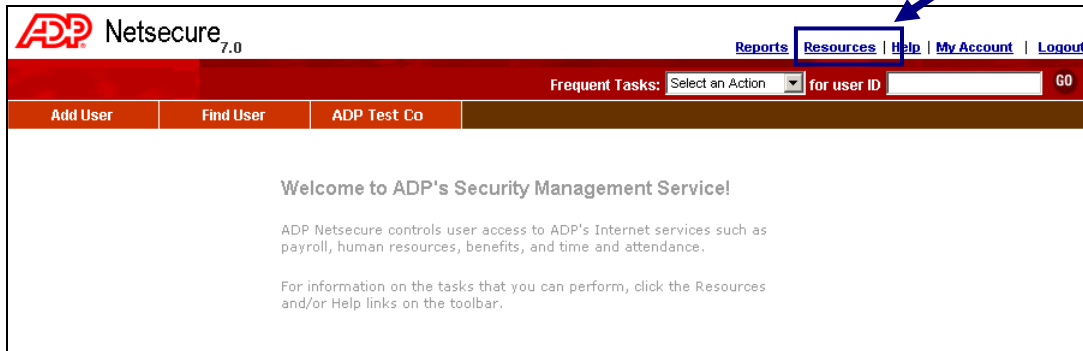


NOTE: When PDF files are transferred to your computer, your browser may automatically store them as temporary files that could be at risk of being viewed at a later time. To prevent unauthorized access to recently viewed pages, be sure to delete your browser's temporary Internet files and close all browser windows after you are finished working with your report.

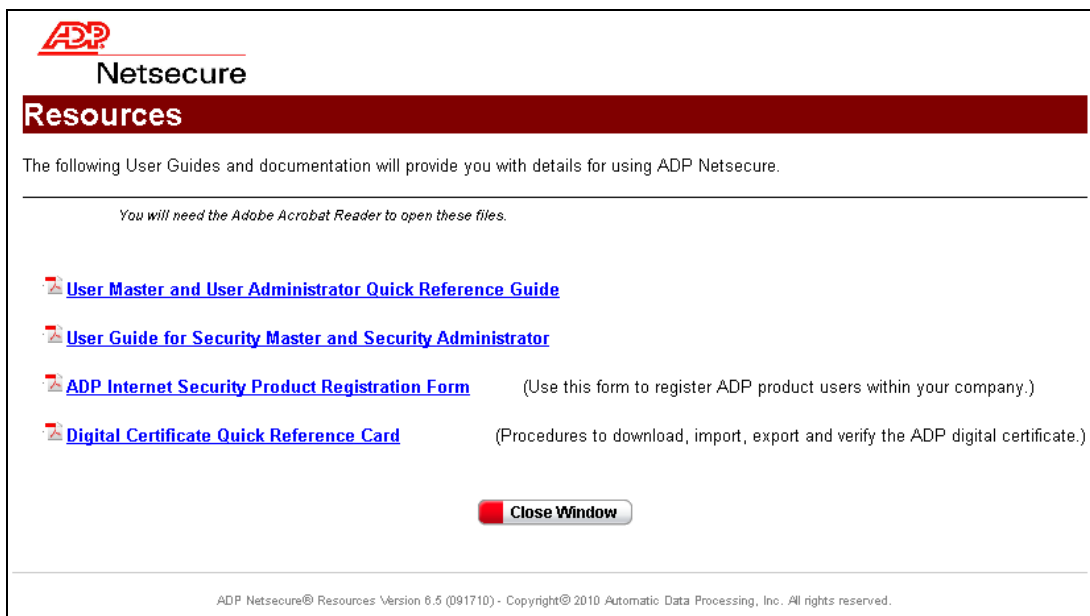
Netsecure Resources

Netsecure provides job aids to assist you with features and functions within Netsecure.

1. Access the Netsecure homepage. Click **Resources**.



2. A Resources window displays. Click the appropriate link to access an Adobe Acrobat file with the specified documentation.



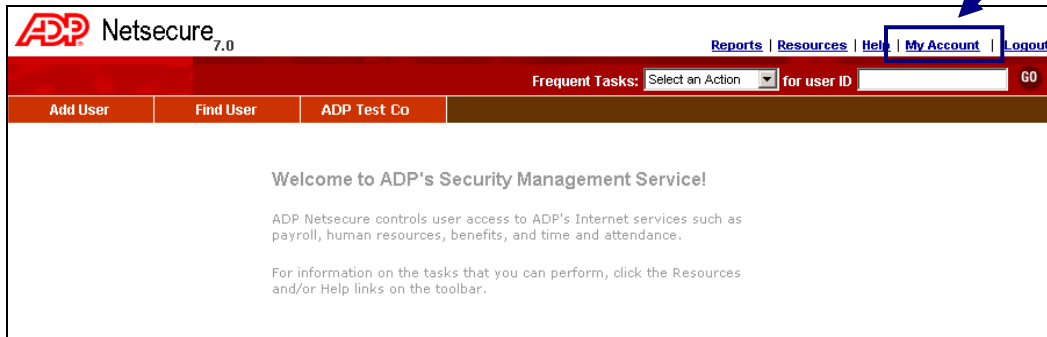
3. Click **Close Window**.

My Account

My Account allows any user to update personal profile information and change existing passwords. (A forgotten password cannot be reset by a user. Only Client Masters or Administrators can reset passwords.)

NOTE: Manage My Services page is not currently in use.

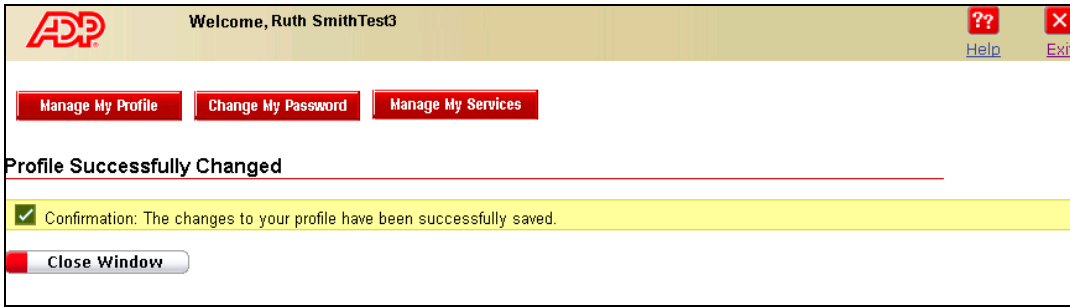
1. Access the Netsecure homepage. Click **My Account** at the top of the page.



2. The Manage My Profile page displays. Your current Contact Information and Security Information displays. Enter updates as needed.

3. Click **Save**.

4. A confirmation message displays. Click **Close Window** or **Exit**.



My Account – Change My Password

Any user can update their password from the My Account page.

1. Access the Netsecure homepage. Click **My Account** at the top of the page.

ADP Netsecure 7.0

Reports | Resources | Help | **My Account** | Logout

Frequent Tasks: Select an Action for user ID GO

Add User Find User ADP Test Co

Welcome to ADP's Security Management Service!

ADP Netsecure controls user access to ADP's Internet services such as payroll, human resources, benefits, and time and attendance.

For information on the tasks that you can perform, click the Resources and/or Help links on the toolbar.

2. The Manage My Profile page displays. Click **Change My Password**.

ADP

Manage My Profile Change My Password Manage My Services

Manage My Profile

Contact Information

First Name: Business/Personal E-Mail: Phone: Country: Business Address 1: Business Address 2: Business Address 3: City/Town: State/Province: Home ZIP/Postal Code:

MI: Last Name: (Apostrophes and hyphens are allowed.)
(This e-mail address is only used for notifications.)
(Area code and number in any format)
(This address is only used for notifications.)

Security Information

The following information is used if you forget your user ID and/or password.

City/Town of Birth: Birth Month and Day:

Select a question from the list and enter your answer. Important: Security answer must be at least 4 characters long and is not case sensitive.

Security Question 1: Answer 1:

Select a different question from the list and enter your answer. Important: Security answer must be at least 4 characters long and is not case sensitive.

Security Question 2: Answer 2:

Save Reset

- The Change My Password page displays. Enter your current password. Enter a new password and confirm the new password by entering it a second time. Click **Submit**.

NOTE: If a Security Alert dialog box appears, click **Yes** to continue.

ADP Change My Password

Passwords must be at least 8 characters long and must contain at least 1 letter and 1 number. Passwords are case sensitive. It is recommended that passwords be 12 or more characters and contain a mix of upper- and lowercase letters, numbers, and special characters.

Important: Do not use user ID, name, or other personal information. Do not store your password on paper or in electronic format. Remember to change it frequently.

Current Password:

Create Password:

Confirm Password:

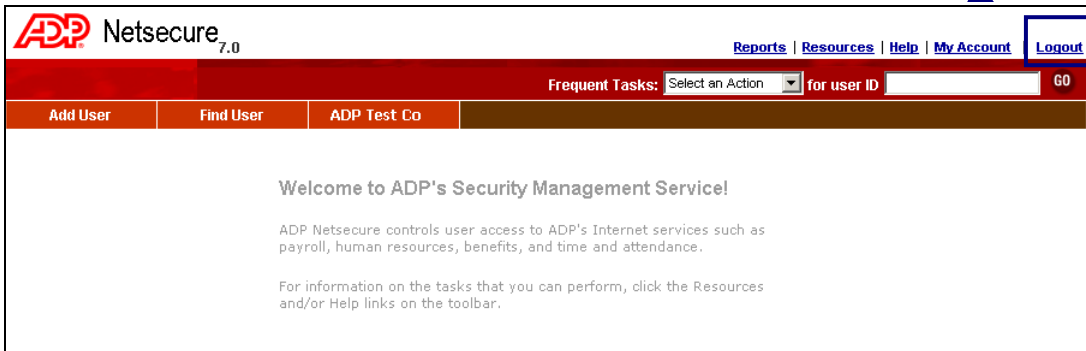
- A confirmation message displays. The new password is effective immediately. Click **Exit** to return to the main page.

ADP Password Successfully Changed

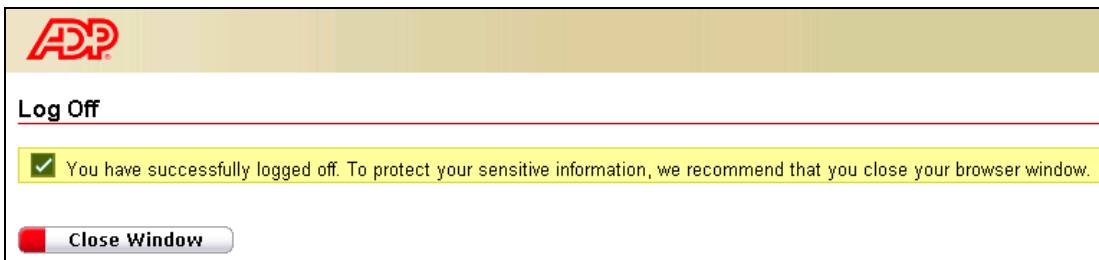
Confirmation: Your password has been successfully changed. Please use your new password the next time you log in.

Log Out of Netsecure

1. To exit completely from Netsecure, click **Logout**.



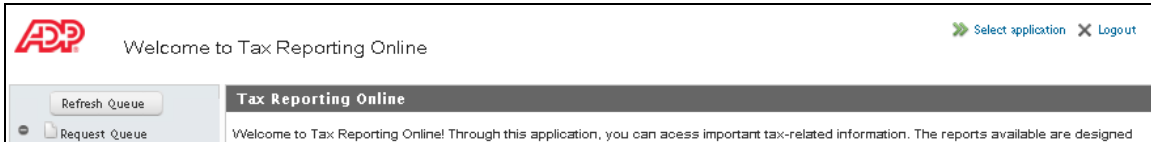
2. A confirmation message displays. Click **Close Window**.



SECURITY SERVICES ADMINISTRATION

The Security Services Administration application is accessed from Tax Reporting Online. The Client Master and/or Client Administrator manage user authorizations to the website from the Security Services Administration application. From the Security Services application, you can set up or change user access authorizations, including application roles, company codes, and reports.

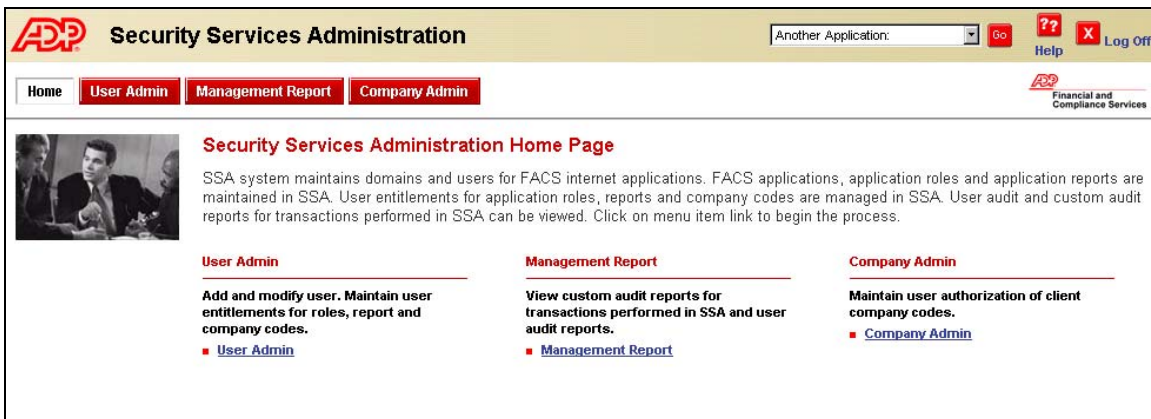
1. Access the Tax Reporting Online application.



2. To access the Security Services Administration application, click the Select application link to open the Available Applications drop-down menu.



3. Click the **Security Services Administration** link. The Security Services Administration Homepage displays.



User Admin

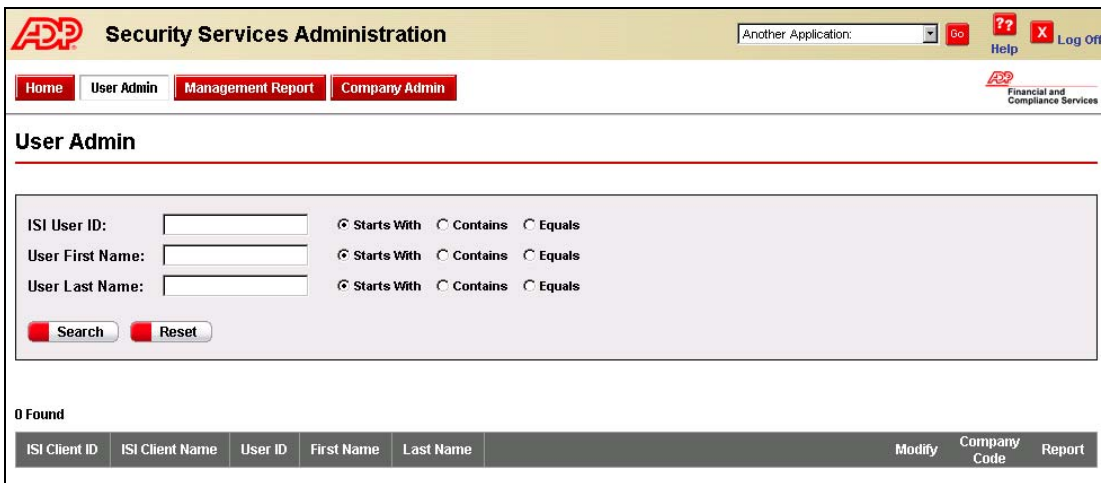
The User Admin section provides maintenance options for user entitlements.

Find User

1. From the tabs across the top of the page, click **User Admin**, or click the **User Admin** link.



2. The User Admin page displays. User search can be done by ISI User ID, user first name, or user last name. Enter a full or partial value in the desired field and select an option for the value entered to search (Starts With, Contains, or Exact phrase). Click **Search**.



A listing of matching users will display at the bottom of the page and will include the ISI Client ID, ISI Client Name, User ID, First Name, and Last Name associated with the user. Links to the right of the page provide access to modify the user information, access company codes, or access reports.

ADP Security Services Administration

Another Application:

[Home](#) [User Admin](#) [Management Report](#) [Company Admin](#)

User Admin

ISI User ID: Starts With Contains Equals

User First Name: Starts With Contains Equals

User Last Name: Starts With Contains Equals

1 Found 1 - 1 |

ISI Client ID	ISI Client Name	User ID	First Name	Last Name	Modify	Company Code	Report
Test1	Test Company	RSmith@Test1	Ruth	Smith			

View User

Selected options and role assignments are available for viewing on a user level.

1. To view the user assignments, click the **User ID** link from the User Admin page.

Security Services Administration

Home | **User Admin** | Management Report | Company Admin

ISI User ID: Starts With Contains Equals
 User First Name: Starts With Contains Equals
 User Last Name: Starts With Contains Equals

1 Found 1 - 1 |

ISI Client ID	ISI Client Name	User ID	First Name	Last Name	Modify	Company Code	Report
Test1	Test Company	RSmith@Test1	Ruth	Smith			

2. The User Admin – View page displays basic information entered in Netsecure as well as the assignments that have been set up. Click **Cancel** to return to the User Admin page.

Security Services Administration

Home | **User Admin** | Management Report | Company Admin

User Admin - View

ISI Client ID: Test1
 ISI Client Name: Test Company
 User ID: RSmith@Test1
 First Name: Ruth
 Last Name: Smith
 Email Address: RSmith@Test1
 Full SSN: Yes
 Full DDA: No

Email Notification:
 Quarter: Yes
 Periodic: Yes
 Agency Notice: Yes
 Amendment/Exception: Yes
 Auto Company Code: Yes
 Auto Report: Yes

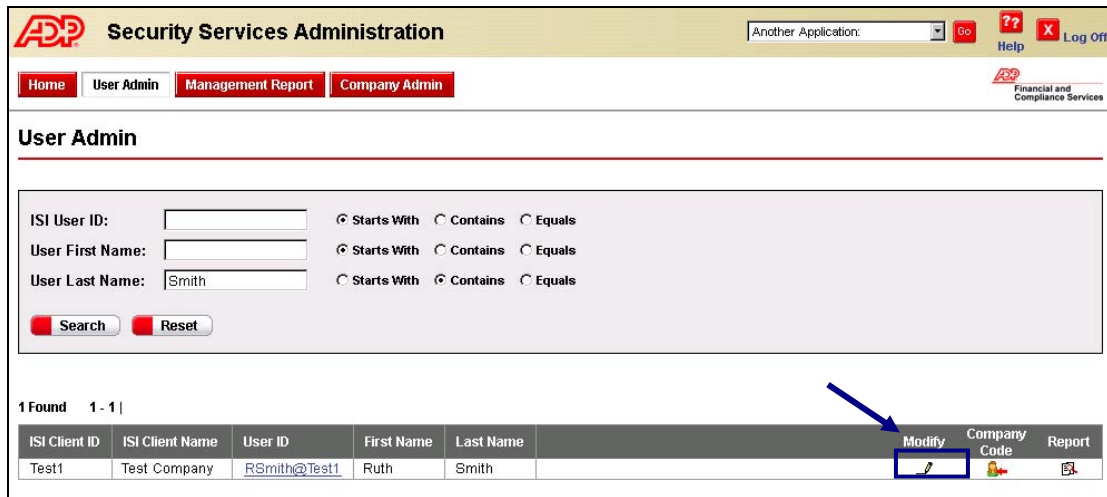
Assigned Roles:
 Security Services Administration
 Tax Reporting Online

Assigned Reports:
 Company Profile Report
 Tax Filing Profile Change Report
 SOD Quarterly Report
 SOD Annual Report
 940 Filing Report
 941 Filing Report

Assigned Company Codes:
 Test1 - XXXXXXX
 Test1 - XXXXXXX
 Test1 - XXXXXXX
 Test1 - XXXXXXX
 Test1 - XXXXXXX

Modify Existing User

- To modify user information, click the **Modify** icon  link from the User Admin page.



Security Services Administration

Home | **User Admin** | Management Report | Company Admin

User Admin

ISI User ID: Starts With Contains Equals
 User First Name: Starts With Contains Equals
 User Last Name: Starts With Contains Equals

1 Found 1 - 1 |

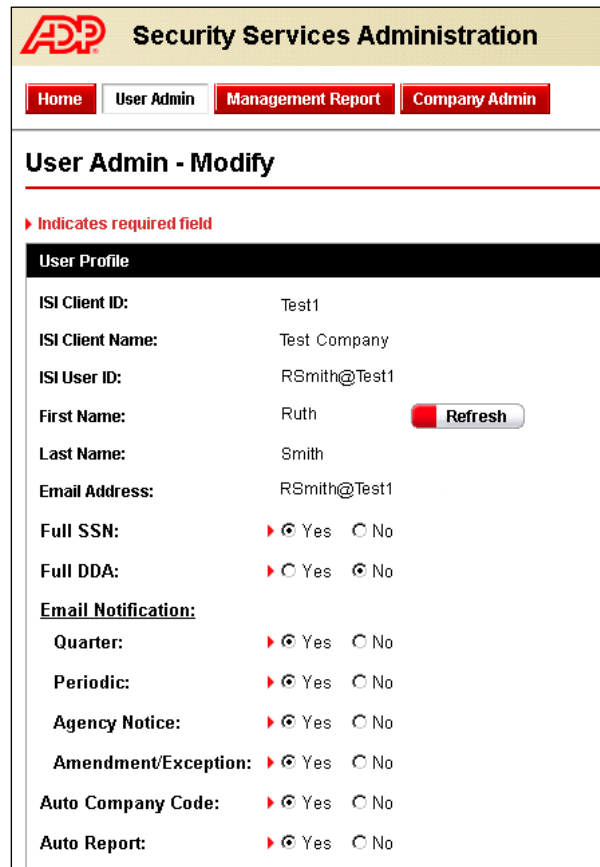
ISI Client ID	ISI Client Name	User ID	First Name	Last Name	Modify	Company Code	Report
Test1	Test Company	RSmith@Test1	Ruth	Smith			

- The User Admin – Modify page displays. To modify an existing user profile, select the new values based on the task or tasks they will be performing for your company. From the User Admin - Modify page, select the new or changed information as follows:

- Full SSN** – Select **Yes** to show full social security number on reports. Select **No** to only display the last four digits of the SSN on reports.
- Full DDA** – Select **Yes** to show full ABA/DDA numbers on reports. Select **No** to only display the last four digits of the ABA/DDAs on reports. (Only users with full DDA entitlement can choose to view unmasked reports.)
- E-mail Notifications** – Default is **No**. Select **Yes** to receive Quarter or Periodic e-mail notification of report availability.
- Auto Company Code** – Default is **No**. Select **Yes** to enable the user to inherit all of the company codes under its domain.
- Auto Report** – Default is **No**. Select **Yes** to enable the user to inherit all of the reports under its domain.

NOTE: The Refresh button can be used to refresh information changed in Netsecure that has not yet populated to the User Admin page.

Fields that must be changed in Netsecure include First Name, Last Name, and Email Address.



Security Services Administration

Home | **User Admin** | Management Report | Company Admin

User Admin - Modify

Indicates required field

User Profile

ISI Client ID: Test1
 ISI Client Name: Test Company
 ISI User ID: RSmith@Test1
 First Name: Ruth
 Last Name: Smith
 Email Address: RSmith@Test1
 Full SSN: Yes No
 Full DDA: Yes No

Email Notification:

Quarter: Yes No
 Periodic: Yes No
 Agency Notice: Yes No
 Amendment/Exception: Yes No

Auto Company Code: Yes No
 Auto Report: Yes No

3. Role Authorizations further define the level of user access. Select the roles to be assigned to the user.

Security Services Administration

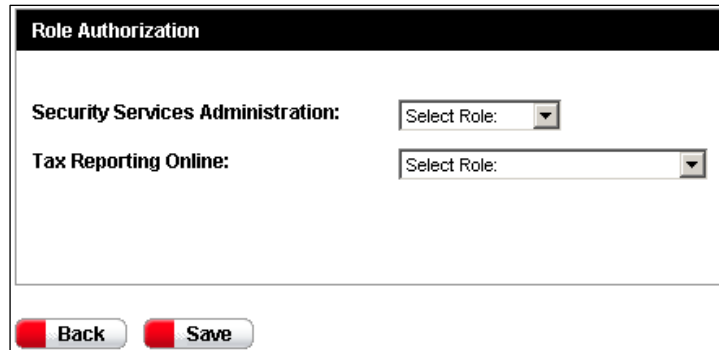
ClientAdmin – User with Security Administrator access for creating, maintaining, and updating additional company users' access to Security Services Administration application.

ExternalViewer – User who has access to view security information only.

Tax Reporting Online

ClientUser – User who has access to all tax reports on Tax Reporting Online.


4. Once all assignments are selected, click **Save**.

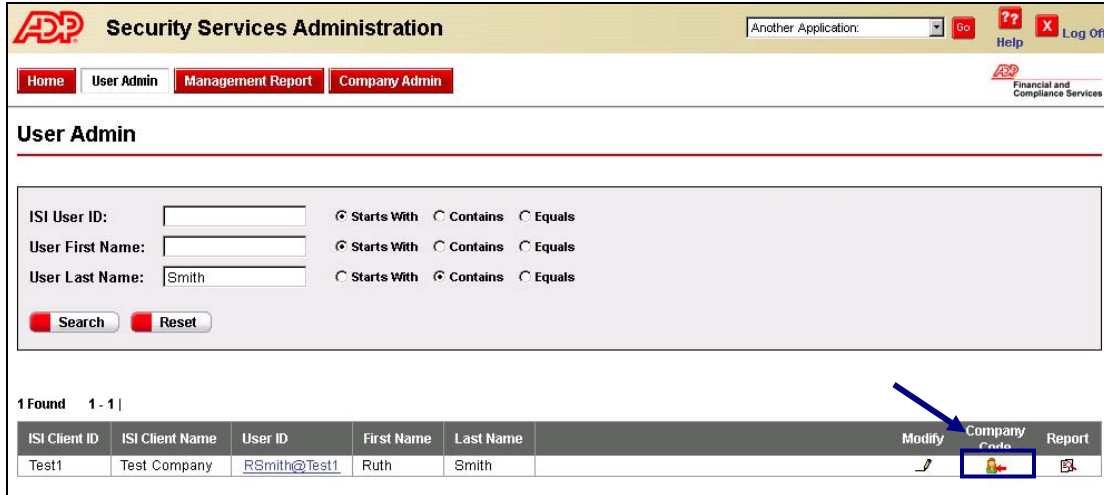


The screenshot shows a web form titled "Role Authorization". It contains two rows of fields. The first row is labeled "Security Services Administration:" and has a dropdown menu with the text "Select Role:". The second row is labeled "Tax Reporting Online:" and also has a dropdown menu with the text "Select Role:". At the bottom of the form, there are two buttons: "Back" and "Save", both with a red highlight on the left side.

Company Code Maintenance

Current company codes assigned to a user can be viewed as well as edited to add or remove company codes.

1. To view the company codes assigned to a user, click the **Company Code** icon  link from the User Admin page.



Security Services Administration

Home | User Admin | Management Report | Company Admin

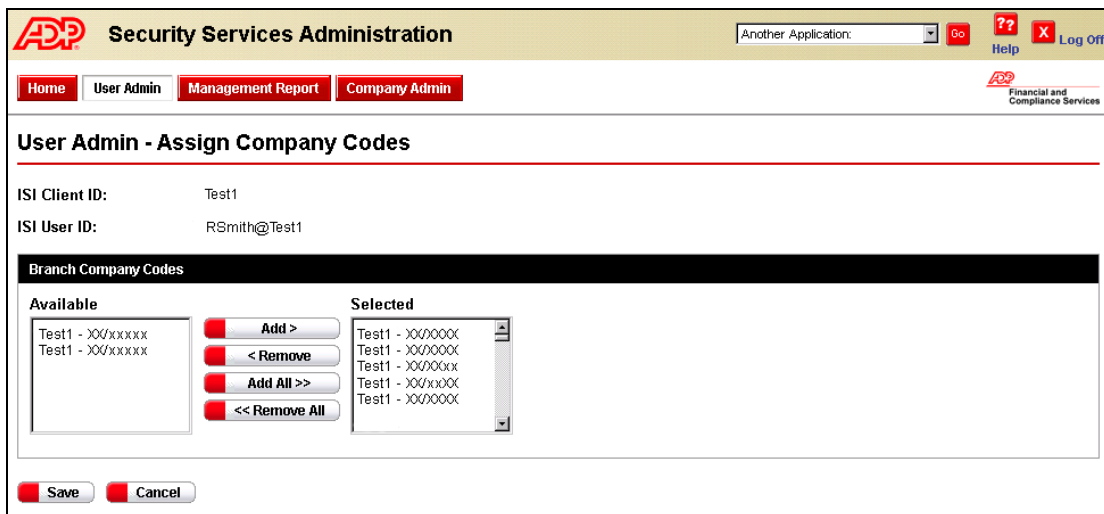
User Admin

ISI User ID: Starts With Contains Equals
 User First Name: Starts With Contains Equals
 User Last Name: Starts With Contains Equals

1 Found 1 - 1 |

ISI Client ID	ISI Client Name	User ID	First Name	Last Name	Modify	Company Code	Report
Test1	Test Company	RSmith@Test1	Ruth	Smith			

2. Company codes that have not been assigned to the user will display in the Available column. Company codes currently assigned to the user will display in the Selected column. To add or remove a company code, click to highlight the company code and then click **Add** or **Remove**. To transfer over all company codes for a designated site code, select one and click **Add All** or **Remove All**.



Security Services Administration

Home | User Admin | Management Report | Company Admin

User Admin - Assign Company Codes

ISI Client ID: Test1
 ISI User ID: RSmith@Test1


Branch Company Codes

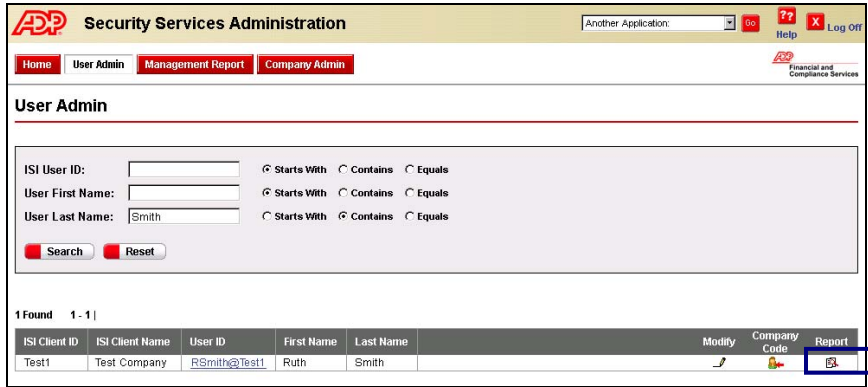
Available		Selected
Test1 - XXXXXXXX	<input type="button" value="Add >"/>	Test1 - XXXXXXXX
Test1 - XXXXXXXX	<input type="button" value="< Remove"/>	Test1 - XXXXXXXX
	<input type="button" value="Add All >>"/>	Test1 - XXXXXXXX
	<input type="button" value="<< Remove All"/>	Test1 - XXXXXXXX

3. Click **Save**, or click **Cancel** to exit the process.

Assign Reports

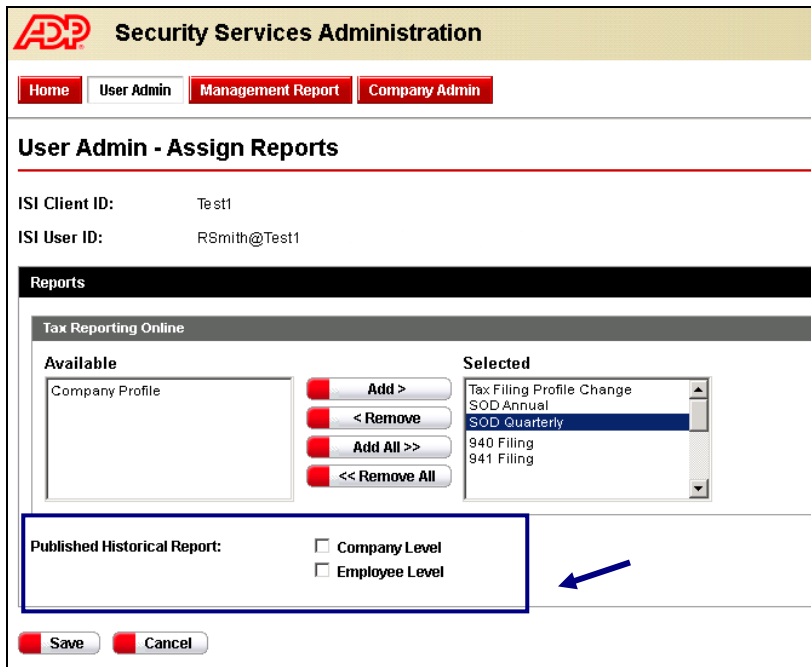
Current report assignments for a user can be viewed or changed.

1. To view the reports assigned to a user, click the **Report** icon  link from the User Admin page.



2. Report groups will be listed based on the role authorizations of the user. Reports that have not been assigned to the user will display in the Available column. Reports currently assigned to the user will display in the Selected column. To add or remove a report, click to highlight the report and then click **Add** or **Remove**. To transfer over all reports, select and click **Add All** or **Remove All**.

To assign a user to view historical reports from the time of the initial Site ID setup, select the Published Historical Report boxes to assign Company Level and Employee Level report access.



IMPORTANT!
It is highly recommended that you review the user profile after completing changes to verify the new values.

3. Click **Save**, or click **Cancel** to exit the process.

Management Report

Management Report provides custom audit reports for transactions performed and user audit reports. Reports are displayed in Crystal Reports Viewer and can also be printed or exported.

From the Security Services Administration Homepage, click **Management Report**, or click the **Management Report** link.



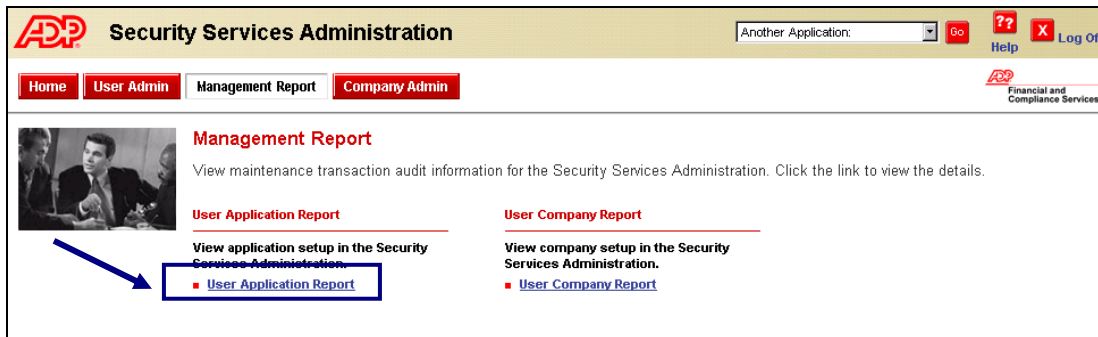
User Application Report

The User Application Report displays detailed information on the applications setup in Security Services Administration.

The report includes:

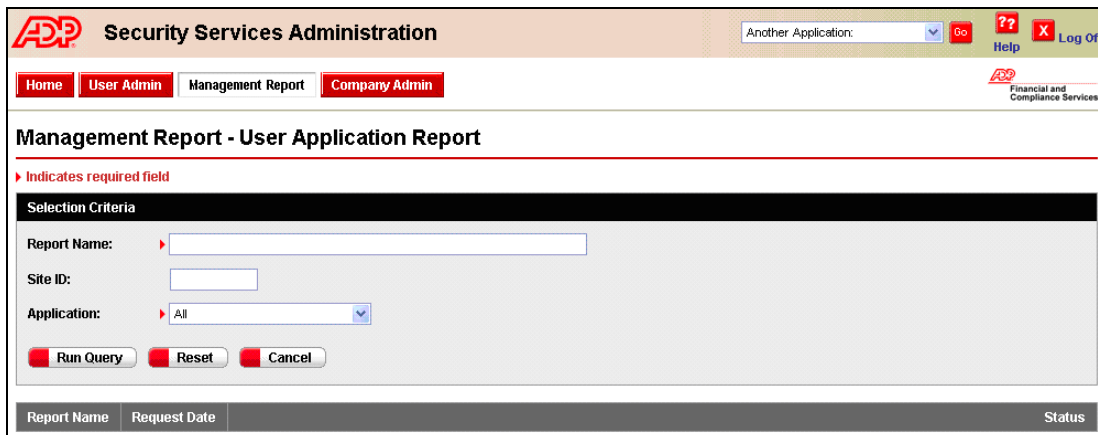
- ISI Client ID and Name
- Name and User ID
- Date of Creation and Last Login
- Application Name
- Role (as assigned)

1. From the Management Report page, click the **User Application Report** link.



2. The Management Report – User Application Report page displays. Enter the report criteria, and click **Run Query**.

- **Report Name** – Enter a name for your report.
- **Site ID** – Enter the specific Site ID for the report.
- **Application** – Using the drop-down arrow, select **All** or the specific application for the report.



- The page displays the request with an In Progress status. Click the **In Progress** link to update.

The screenshot shows the ADP Security Services Administration web application. The page title is "Management Report - User Application Report". Under "Selection Criteria", the "Report Name" is "Test Report" and the "Application" is "Tax Service". There are buttons for "Run Query", "Reset", and "Cancel". A table at the bottom shows the report details:

Report Name	Request Date	Status
Test Report	08/13/2009 12:15:41	In Progress

A blue arrow points to the "In Progress" link in the status column, which is highlighted with a blue box.

- When the status changes to Ready, click the **Ready** link to view the report in Crystal Reports Viewer.

The screenshot shows the ADP Security Services Administration web application. The page title is "Management Report - User Application Report". Under "Selection Criteria", the "Report Name" is "Test Report" and the "Application" is "Tax Service". There are buttons for "Run Query", "Reset", and "Cancel". A table at the bottom shows the report details:

Report Name	Request Date	Status
Test Report	08/13/2009 12:15:41	Ready

A blue arrow points to the "Ready" link in the status column, which is highlighted with a blue box.

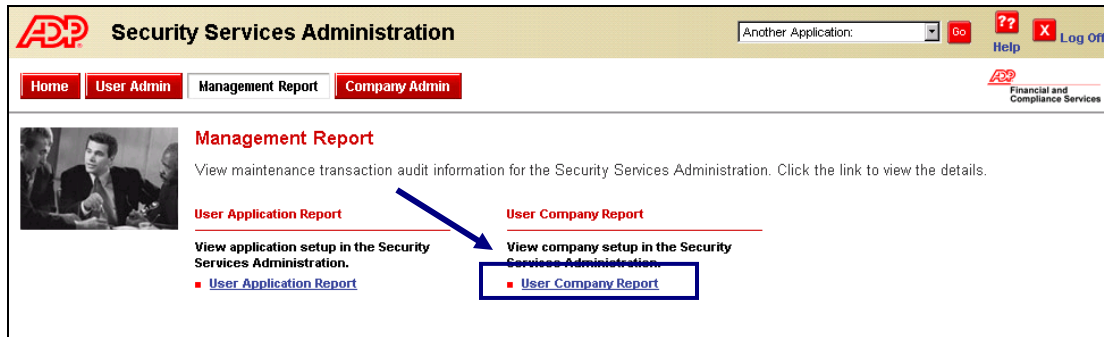
User Company Report

The User Company Report displays the company setup in Security Services Administration.

The report includes:

- ISI Client ID and Name
- User ID
- Creation Date
- Site ID
- Br/Co

1. From the Management Report page, click the **User Company Report** link.



2. The Management Report – User Company Report page displays. Enter the report criteria and click **Run Query**.

- **Report Name** – Enter a name for your report.
- **Site ID** – Enter the specific Site ID for the report.

- The page displays the request with an In Progress status. Click the **In Progress** link to update.

The screenshot shows the 'Management Report - User Company Report' page. Under 'Selection Criteria', the 'Report Name' is 'Test Report'. Below the form are buttons for 'Run Query', 'Reset', and 'Cancel'. A table at the bottom lists the report details:

Report Name	Request Date	Status
Test Report	08/13/2009 12:19:48	In Progress

A blue arrow points to the 'In Progress' link in the status column, which is also highlighted with a blue box.

- When the status changes to Ready, click the **Ready** link to view the report in Crystal Reports Viewer.

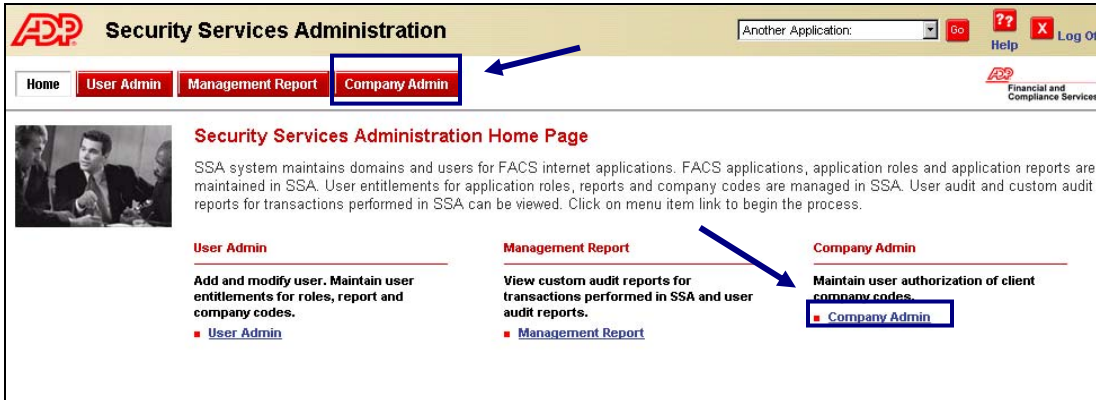
This screenshot is identical to the previous one, but the status of the report in the table has changed to 'Ready'. A blue arrow points to the 'Ready' link, which is highlighted with a blue box.

Report Name	Request Date	Status
Test Report	08/13/2009 12:19:48	Ready

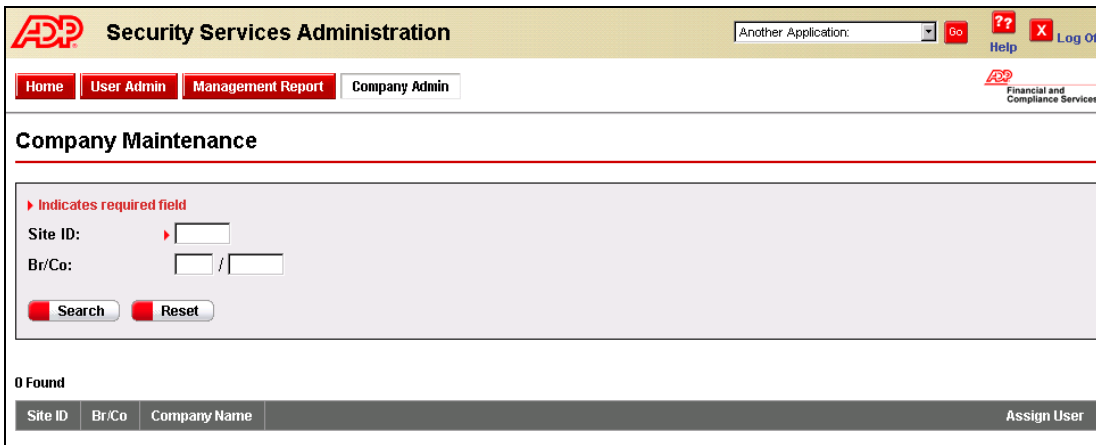
Company Admin

The Company Admin area is for Administrators to maintain and change assignments of company code authorizations for users.

1. From the Security Services Administration Homepage, click the **Company Admin** tab or click the **Company Admin** link.



2. The Company Maintenance page displays. Enter the **Site ID** and the **Branch/Company Code** for the company you would like to update users, and click **Search**.



- All Company Names found with the searched criteria displays. Click the **Assign User** icon link for the company.

Company Maintenance

Indicates required field

Site ID:

Br/Co: /

5 Found 1 - 5 |

Site ID	Br/Co	Company Name	Assign User
Test1	XXXXX2	Test Company - 2	
Test1	XXXXXX	Test Company - X	
Test1	XXXXX3	Test Company - 3	
Test1	XXXXX3	Test Company - 3	
Test1	XXXXX3	Test Company - 3	

- The Company Maintenance – Assign Company to Users page displays. Users who have not been assigned to the company will display in the Available column. Users currently assigned to the company will display in the Selected column. To add or remove a user, click to highlight the user and then click **Add** or **Remove**. To transfer over all users in this field, select and click **Add All** or **Remove All**.

Company Maintenance - Assign Company to Users

Site ID: Test1


Br/Co: XXXX2

Users

Available	Selected
RSmithTest1Admin@Test1	MDoeTest1Admin@Test1
DJonesTest2Admin@Test2	JJacksonTest2Admin@Test2

- Click **Save**, or click **Cancel** to exit the process.

Log Off Security Services Administration

1. To exit completely from Security Services Administration, click the  icon in the top-right corner of the page.



2. A confirmation message displays. Click **Close Window**.

