Uluro is a product of Transformations, Inc.

Uluro Web 3.0 Manual

Terms & Conditions

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Transformations, Inc. requires all jobs to be properly tested with processing times verified before being moved into production. Processing speeds can vary as they are dependent upon hardware selection, job setup, job size, and network load, and each individual company will have varying performance requirements. Even though Uluro is a full production offering for print and mail, Transformations highly recommends that you contact a networking engineer/professional for specific consultation on this subject. Transformations, Inc. does not manage or configure clients' networks, back-up facilities or trouble shoot server communication and hardware issues. With that said, the Transformations support team is always available to assist if performance issues exist. The purpose of this guide is to serve as an aid in configuring your hardware to the best of our knowledge as failure to meet recommended specs may result in slower than normal processing.

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Introduction

Uluro's simple and powerful branding tools can be implemented for any number of clients. With an unlimited number of pages available and full support for any CSS (Cascading Style Sheets), the branding is only limited by your design knowledge or your client's imagination. The branding flows through all pages from initial upload, all the way through web presentment and bill pay to ensure every user has a complete and professional solution.

The CSS support makes changing the look and feel simple for anyone with basic HTML knowledge. This lets you offer basic branding for a nominal fee or use the API tool set to create a fully branded e-delivery site that has the same look and feel as a corporate site.

Uluro enables you to deliver communications across all media and fully customize the appearance of the delivery method without the need for expensive programming staff.

In today's world of instant gratification, you need to offer more services than just print and mail. Uluro enables you to expand your services to true secure multi-channel delivery. Uluro can support your workflow with:

- Secure web submission
- Web proofing
- Web delivery as HTML, image or PDF
- Email with login links or PDF attachments
- Support for single-on
- Fully or partially branded websites
- Fully integrated BillPay support

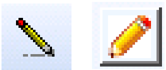
Uluro is a single web based solution that includes secure branded customer facing self-service solution with capabilities that enable the full range of business and consumer customer service, payments and account management activities. The Uluro zero foot-print web-based solution provides a secure dashboard for customers to access search and retrieve information from a single, easy-to-use web interface.

Implementation Summary

1. Set up and configure the site.
2. Customize the site for that client including text, images, or custom web pages.
3. Create users for the site.
4. Set up and customize self registration.
5. Customize the web display column settings when searching for documents.

Control Buttons


New – Click to create a new record.


Edit – Clcik to edit a record.

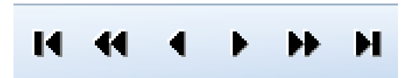
Save – Cllick to save changes made to a record.


Cancel – Click to cancel changes made to a record.


Copy – Click to copy a record and then edit as desired.

Delete – Click to delete a record.


Close – Click to close the form.



Navigator:

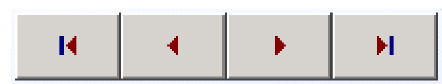
- First Record
- Back 5 records
- Previous record
- Next Record

These buttons allows the user to add a new item.

These buttons allows the user to edit an item.

These buttons allows the user to save the item you just edited/added.

These buttons always the user to cancel any changes made to the item.

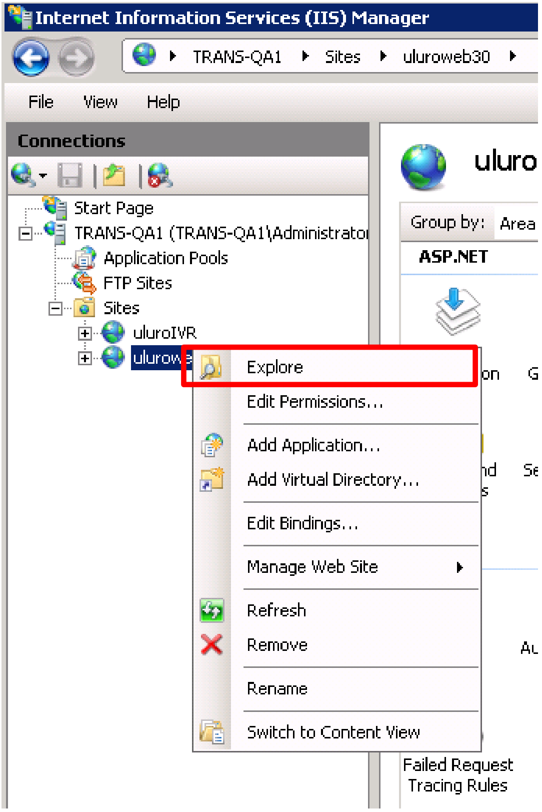


Navigator:

- First Record
- Previous record
- Next Record
- Last Record

Web Image Directory

All images for the site, including the logos, will need to be placed in the client images directory. If you do not know where that image directory is located, you can open IIS, right click on UluroWeb30 and select Explore. This will automatically take you to your WEB30 directory. The client images folder is located in the WEB30 directory.



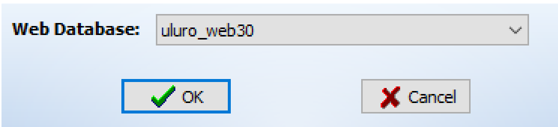
Tips from Transformations:

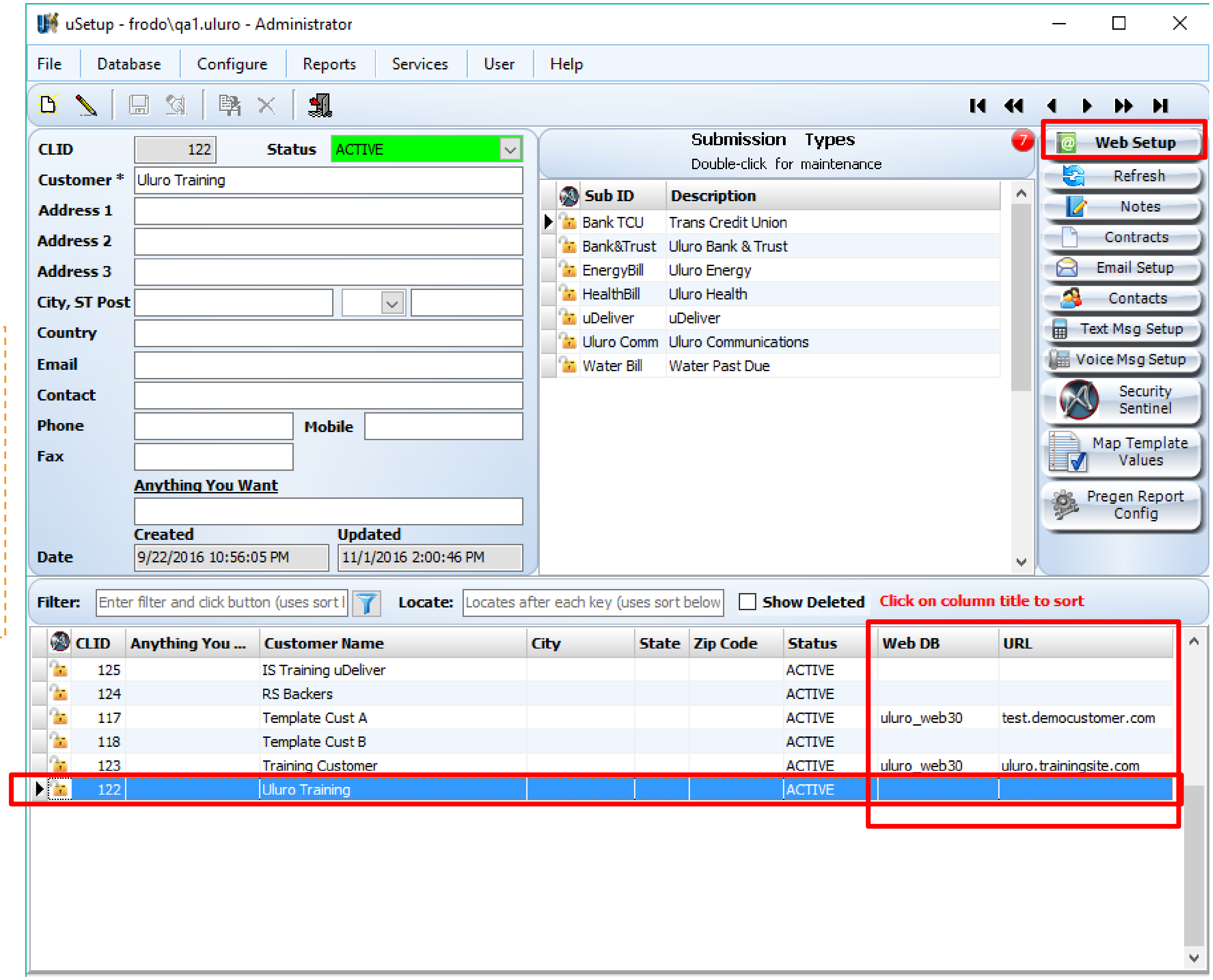
We recommend creating a folder for each client/site within the client images directory.

Web Setup

There are two ways to set a customer up for the web:

1. Double click the customer from the list at the bottom of the main uSetup.exe screen. Choose the web database uluro_web30.
2. Web Setup button at the top of the right hand column on the main uSetup.exe screen. Choose the web database uluro_web30.

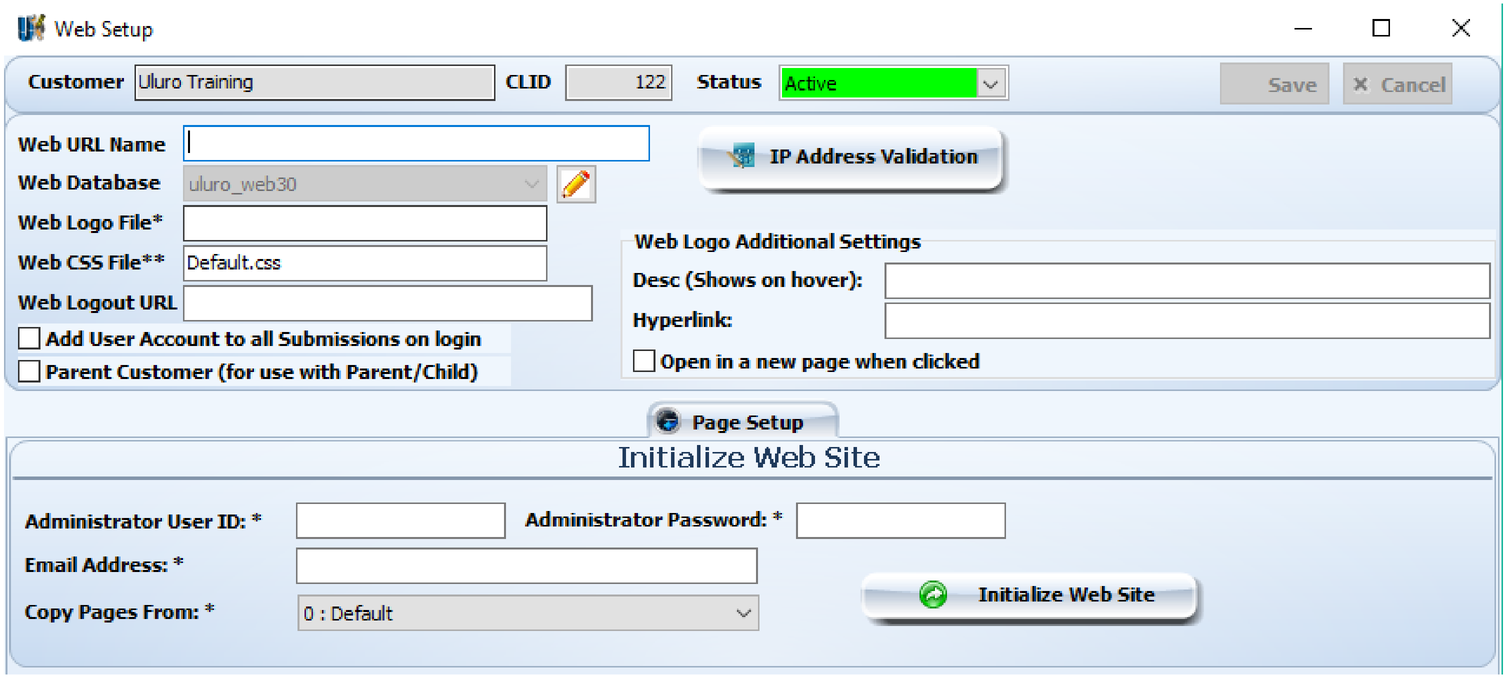




Tips from Transformations:

You can tell if a customer has been setup for the web already by looking at the Web DB/URL columns in the customer list in uSetup. For example, the Template Cust A and Training Customer have sites setup on the web.

Once a database is selected, you can initialize the site. The bottom portion (Page Setup tab) will only be visible until you save the site. You will not be able to come back and edit that portion once the site is initialized.



Web URL Name – This typcially comes from your hosting service. You will need to set up your DNS to point to your web server and set up your URLs. It is common to purchase a general domain and create subdomains for each of your clients.

Web Database – This reflect the database selected previously. It is grayed out but can be edited by clicking on the pencil to edit. You will then be allowed to select a different database from the web database dropdown. If a site has been completely setup for one database including users, a considerable amount of time may be required to change databases.

Web Logo File – This is the image that will appear in the top left corner above the login section. Enter the path to the logo after the client images directory. The Web Logo file will by deafult use the relative path to the client images directory.

Web CSS File – This will always be Default.css to start with. You can customize the CSS once the site is initialized.

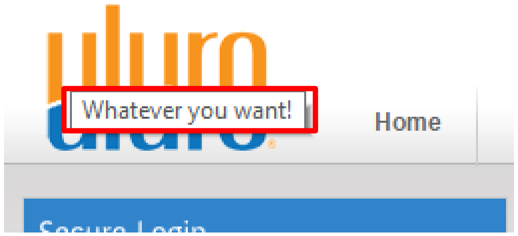
Web Logoout URL – This will be the site that users will be directly to when they sign out/logout of the site. It must contain an http:// or https://.

Add User Account to all Submission on login – When an account number is linked to a user, if this is checked, the user will be linked to that same account number for each submission type under this client. Once this is checked, this setting takes effect for all users on the site, even if set up prior to checking this setting.

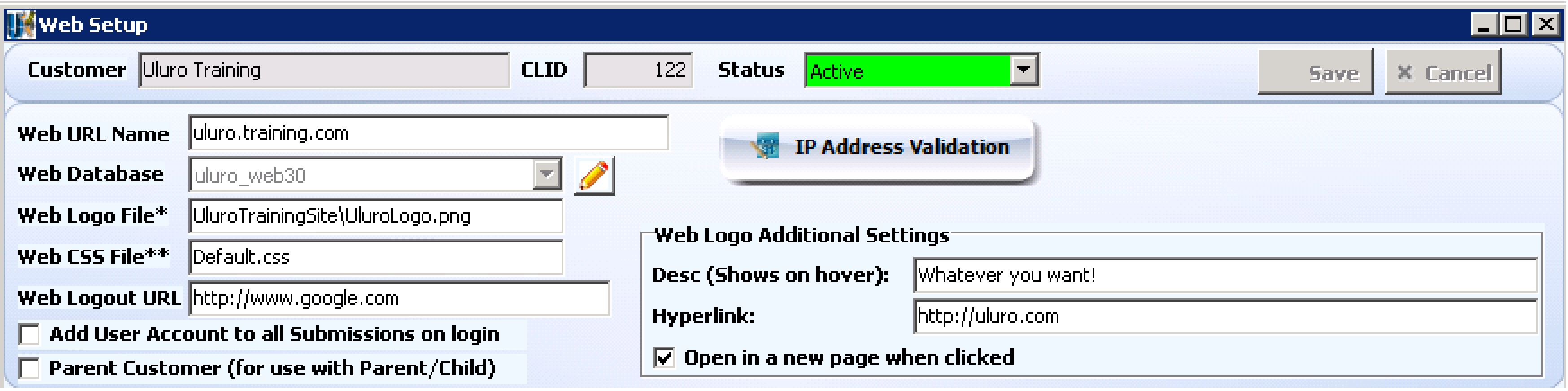
Parent Customer – This will need to be checked if this site will be used as a parent site when setting up parnet/child.

Web Logo Additional Settings

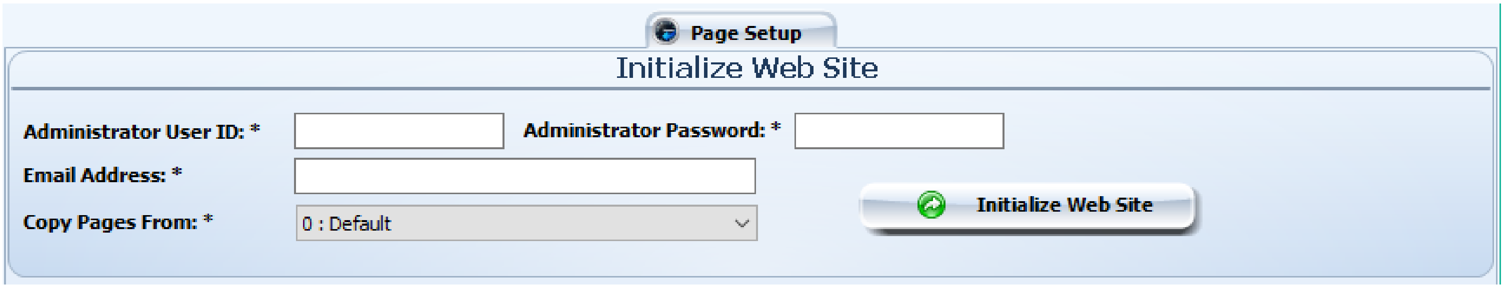
Desc (shows on hover): The text here will be displayed when a user hovers the mouse over the Web Logo File image on the site.



Hyperlink: If a user clicks on the Web Logo File image, the user will be redirected to the site that is entered here. The site must have http:// or https://. If the Open in a new page when clicked checkbox is checked, the site will open in a new window/tab (based on the browser being used to view the site) and the current window/tab will stay on the Uuro Web URL site.



Now that the top portion is complete, click SAVE.



Initialize the Site

The Page Setup tab at the bottom of the web setup only appears the first time you create a site. Once it has been initialized and set up this tab will change and these settings will no longer be accessible.

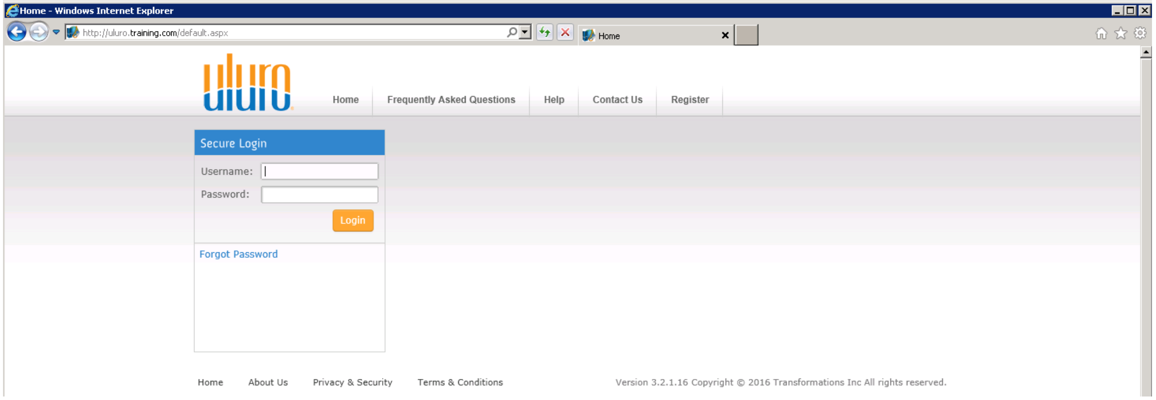
Administrator User ID/Administrator Password – These make up the initial administrator login for the site. This will be the user that you will use to create other users and customize the site. You will use the User ID and Password entered here to log into the site initially. There are no password rules for this initial user.

Email Address – Enter the email address for the admin user. This should be a working email address that the admin user will have access to if an email is triggered later during the customization of the site.

Copy Pages From – This allows you to copy pages from an existing website. This is designed for customizing pages off the Uluro site tree. The dropdown menu will list all clients that have a site setup. This will only copy custom web pages that have been created. It does not copy any of the other settings from that site.

Click the Initialize Web Site button. At this point the site has been created. The very first time the admin user logs in, the site will have to initialize; the pages have to get allocated to the site, and all of the database entries entered for the site. The first time may take up to 60 seconds. After that it will be instantaneous.

At this point the site will look like this:

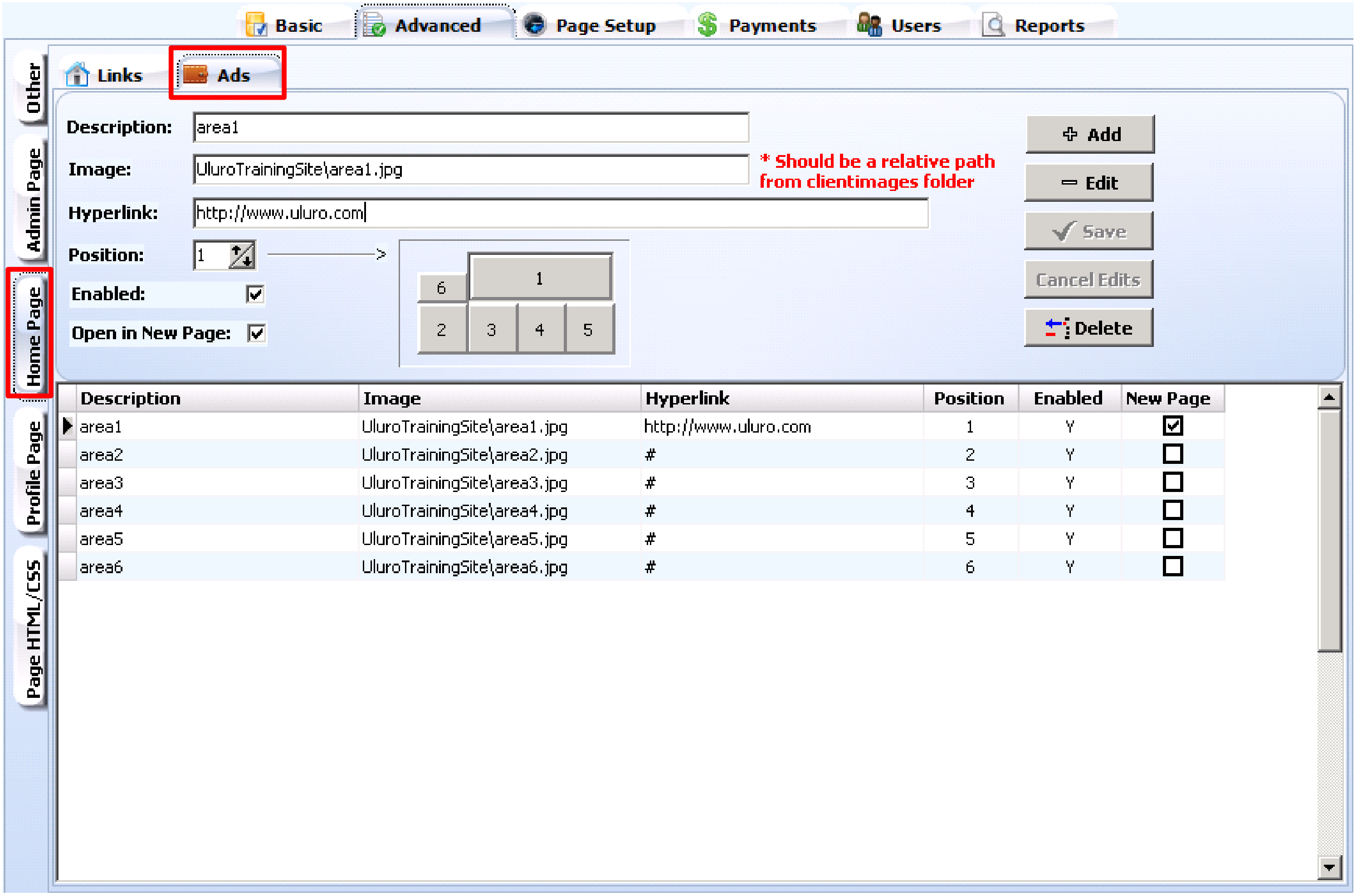


The Advanced Tab is where the majority of settings pertaining to the site's appearance are located.

Home Page (Advanced Tab)

Ads for the Main Page

Along the left side, select Home Page. Then click the Ads tab. This is where the images on the main site are customized.

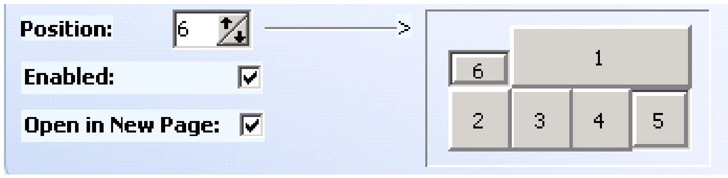


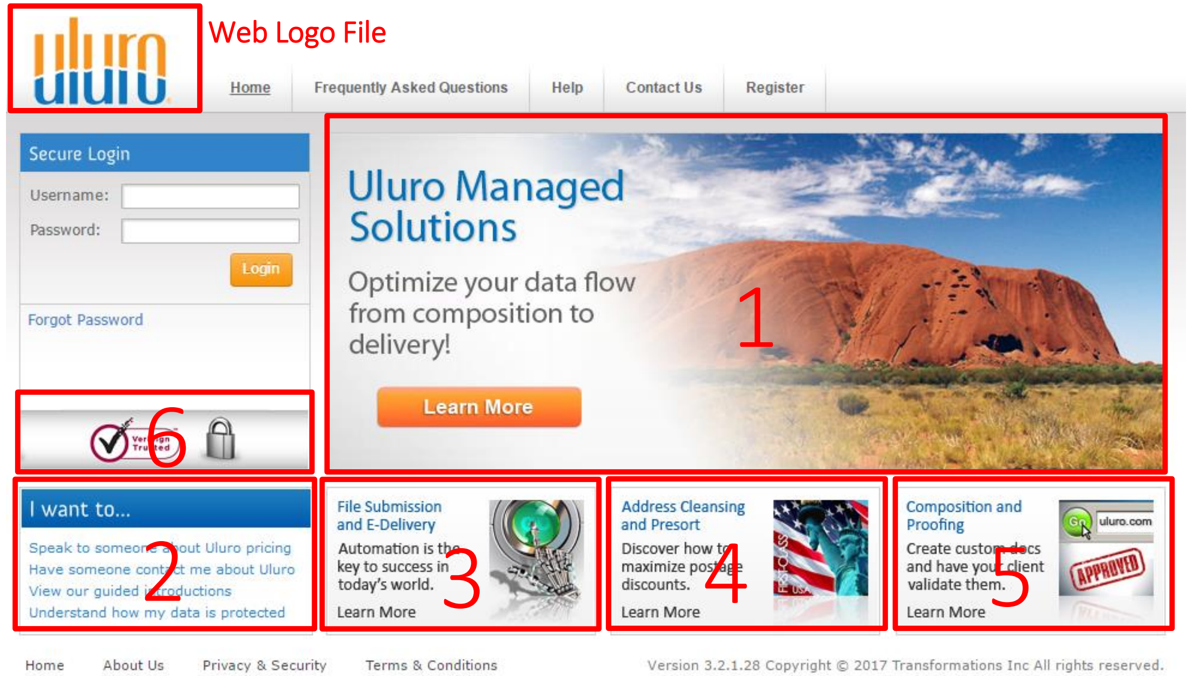
Description – Enter a description that will easily identify the area that the image is located.

Image – This is using a relative path from the client images directory. Enter the path to the image desired for that area.

Hyperlink – This is the site that a user will be redirected to if the image is clicked. It must have http:// or https://. This field is required to save the entry. If a new site is not desired, enter # to reload the current page.

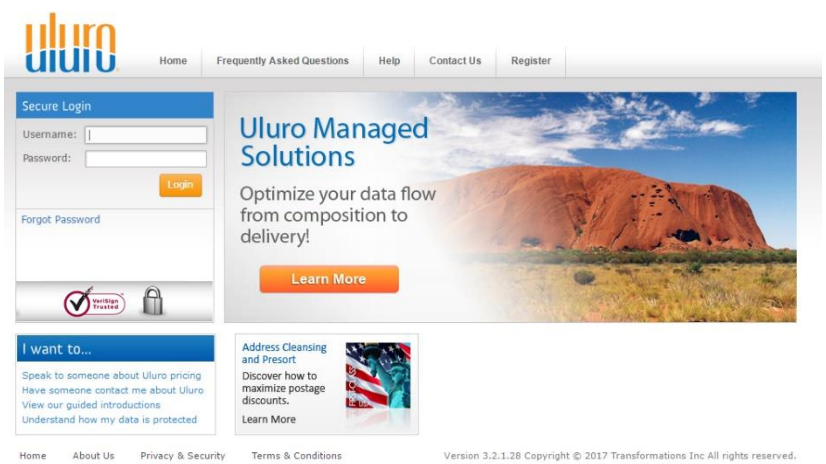
Position – This corresponds to the numbered blocks to the right of position. Click either the block of the numbered position desired or enter it using the arrows. Changing one will update the other to reflect the same numbered position.



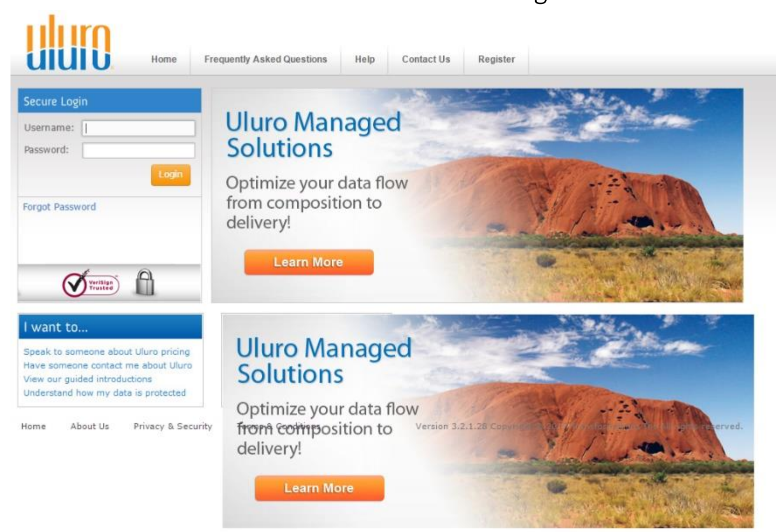


Enabled – If this is checked, the image will appear on the site.

If some areas are not enabled, the images will shift position to fill gaps. If area 3 and area 5 are not enabled:



The size of the image on the site is determined by the size of the image itself. If area 1 and area 4 have the same image:



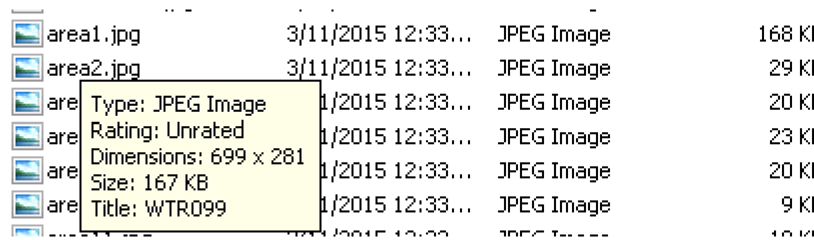
Open in New Page – If this is checked, the hyperlink will open in a new tab/window when an image with a hyperlink is selected.

Tips from Transformations:

The Uluro images are on your server from the install for you to reference.

If you hover over an image in the client images directory, the dimensions of the image will be displayed.

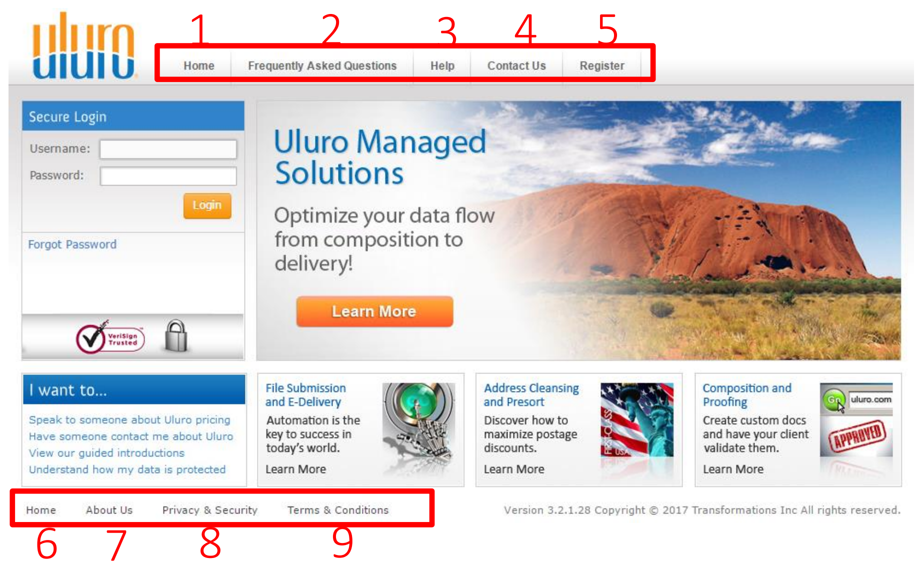
Area:	Size (in pixels):
Header Logo	75-130 wide x 75 height
Area 1	699 wide x 281 height
Area 2	245 wide x 124 height
Area 3, 4, 5	221 wide x 120 height
Area 6	241 wide x 51 height



Images will need to be sized appropriately prior to placing the images in the client image directory.

Area 3-5 can be consolidated to be one large image that is 699 wide x 120 height.

Links for the Main Page



This controls the links across the main site menus on the top and bottom. To edit these go to the Advanced tab under the web setup. Select the Home Page tab along the left side column and then the links tab.

Description – This will be displayed when a user hovers over the Text.

Text – This will be displayed on the site as the name of the link.

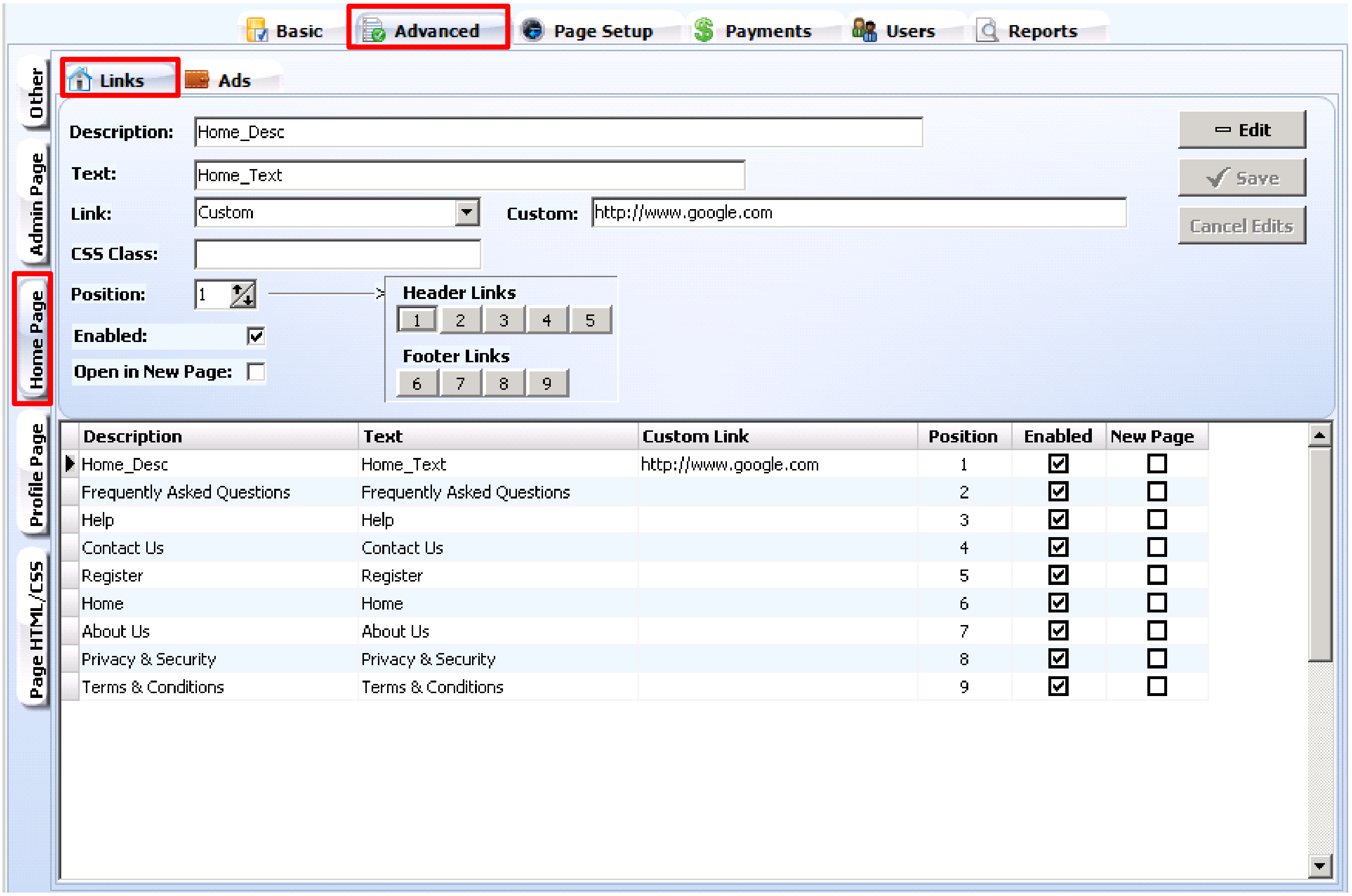
Link – This is the page that the user will go to when the link is clicked. Choose from the 8 that are set up by default or choose **Custom**. Once custom is selected, an area to enter any link will appear. The custom link entered will need to have http:// or https://.

CSS Class – If you create a custom CSS class within the customized general.css for the site (general_122.css for example) enter that here. This will be the CSS used to display the page associated with the link.

Position – This determines where the link is displayed across the top (Header) or the bottom (Footer) and the order of each across the top and bottom.

Enabled – If this is checked, the image will appear on the site.

Open in New Page – If this is checked, the hyperlink will open in a new tab/window when an image with a hyperlink is selected. This is available on the first Home Link ONLY (which can be renamed and placed in any position) that is position 1 by default.



Tips from Transformations:

If only positions 1, 2, 4, 7 are enabled, they will be displayed as 1, 2, 4 across the header position and 7 on the footer position; they will be consolidated to the left but the bottom footer links will not be pushed ot the header links even if there is room. If a link (ex: Privacy and Security) is placed in a position (1) that is already occupied, it will be given that new position (Privacy & Security-1) and the link previously in that position will be moved to the next (Home_Text – 2) postion. All other links will be moved to the next position as well.

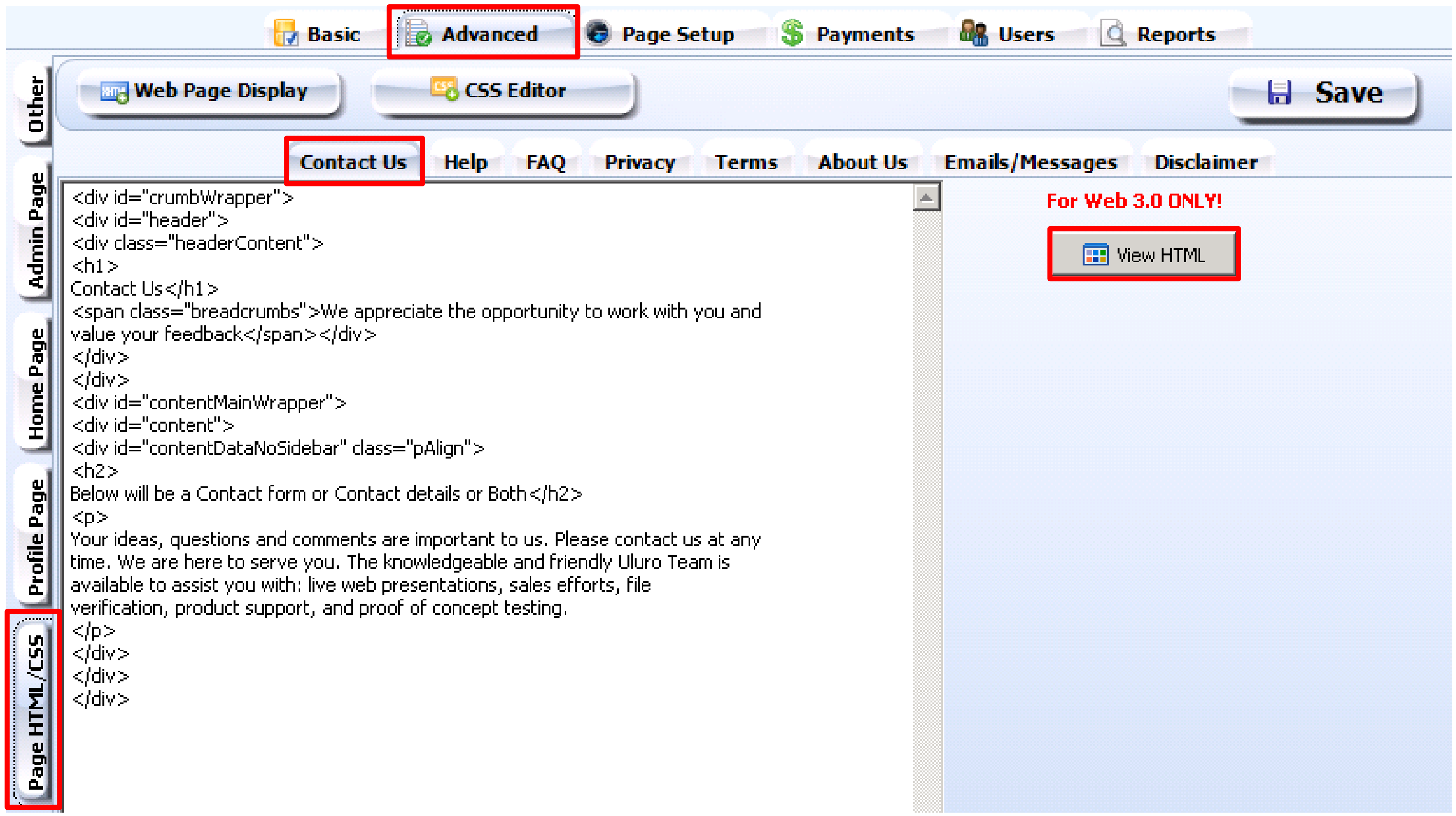
To edit the text for these links (other than Home and Register) go to Page HTML/CSS editor along the left hand side of the advanced tab.

Page HTML/CSS Editor (Advanced tab)

To edit the pages that the links are tied to on the main site page go to the Advanced tab and select Page HTML/CSS along the left side.

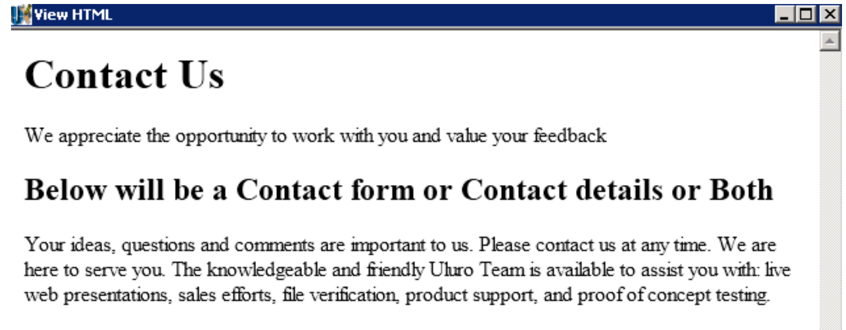
There is an additional set of tabs which include the links that can be edited:

- Contact Us
- Help
- FAQ
- Privacy
- Terms
- About Us



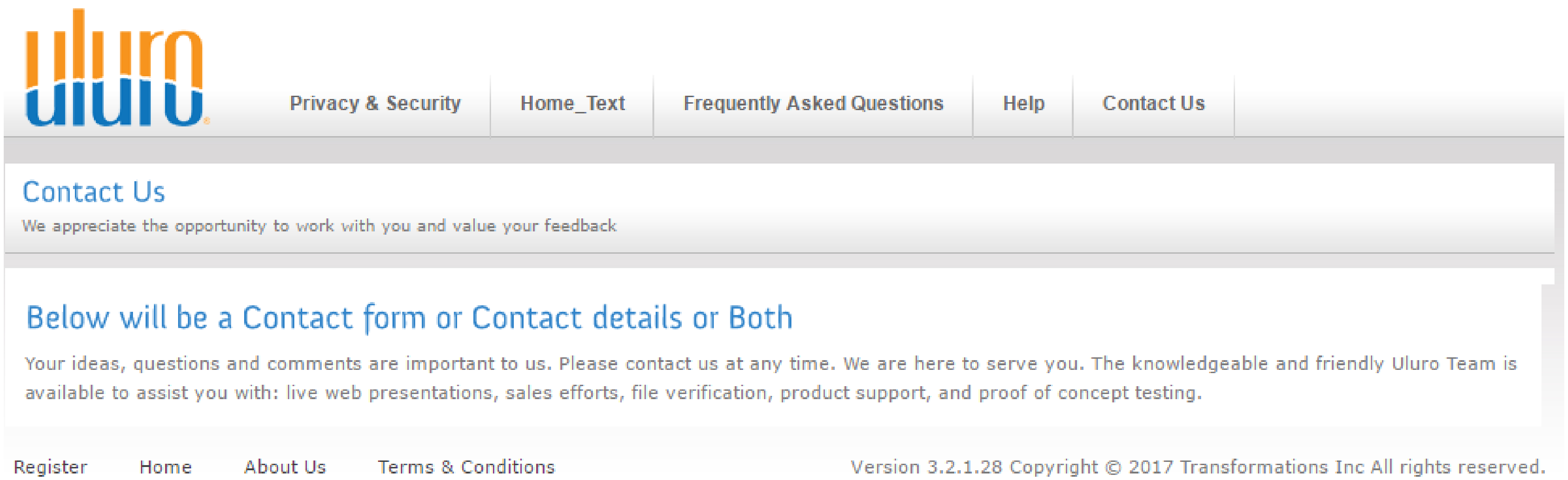
Home cannot be edited since it does not link to a new page of text to edit. Register takes users to a page designed already to self-register for the site. That page can be customized using New Password/Registration Verification.

Contact Us



Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:

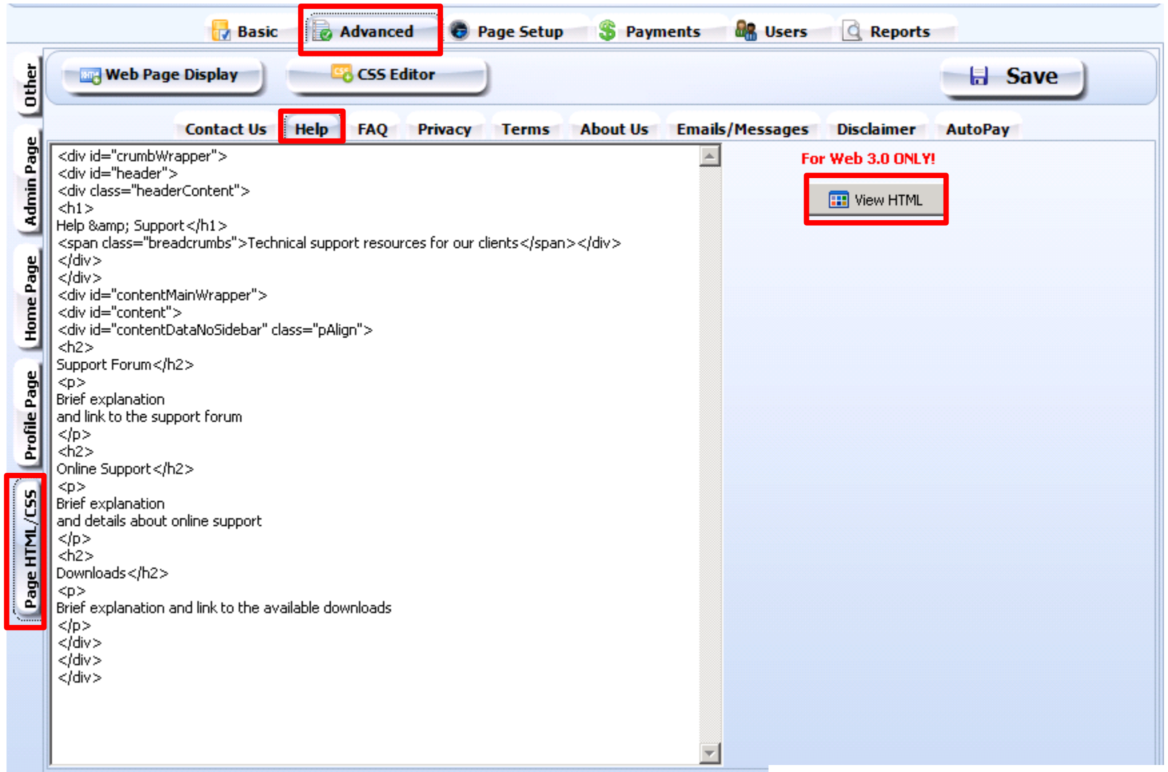
Click the link on the main site page to view the linked page users will be directed to:



Tips from Transformations:

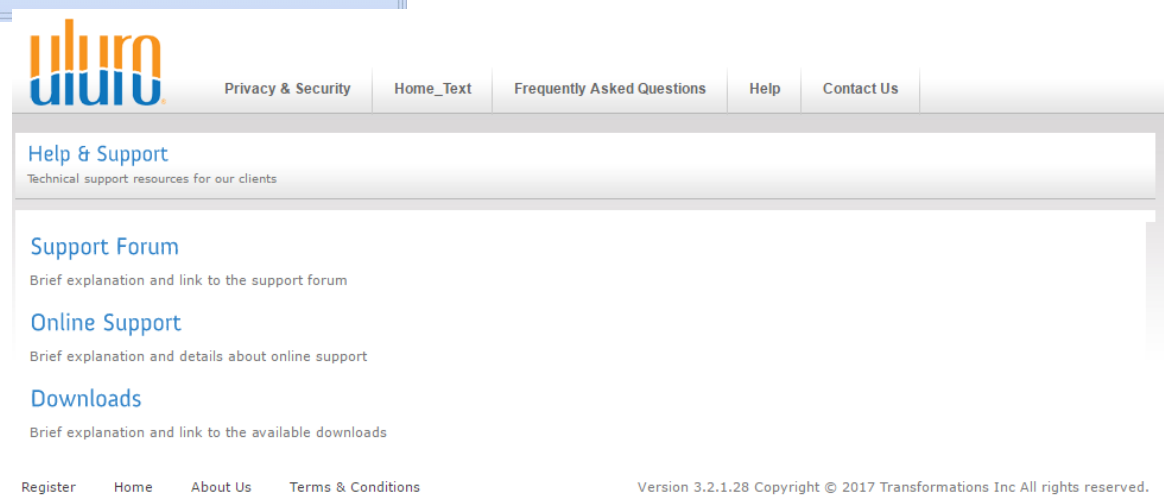
Most of these are just a template of filler text so we recommend editing these before users access the site!

Help

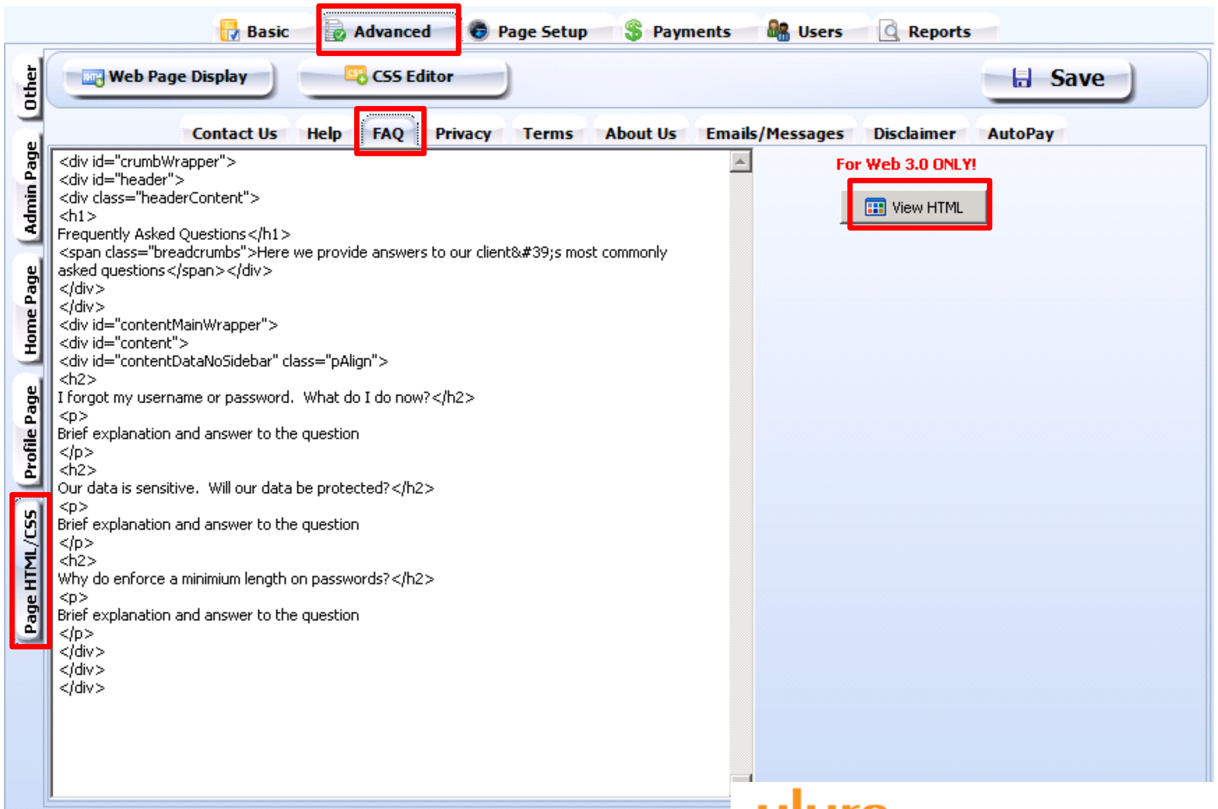


Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:

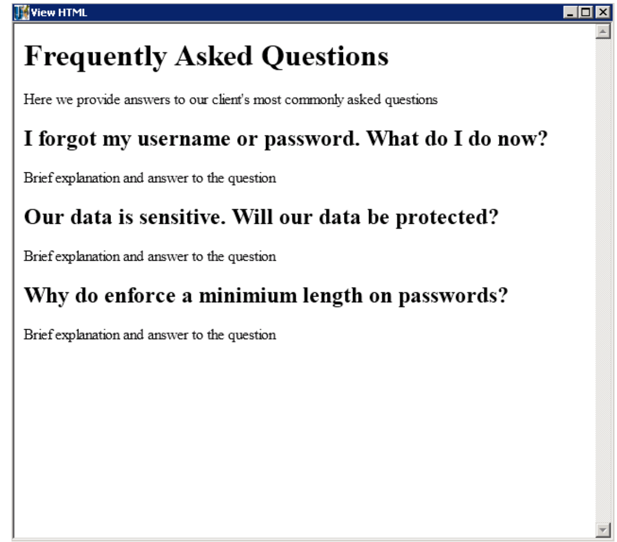
Click the link on the main site page to view the linked page users will be directed to:



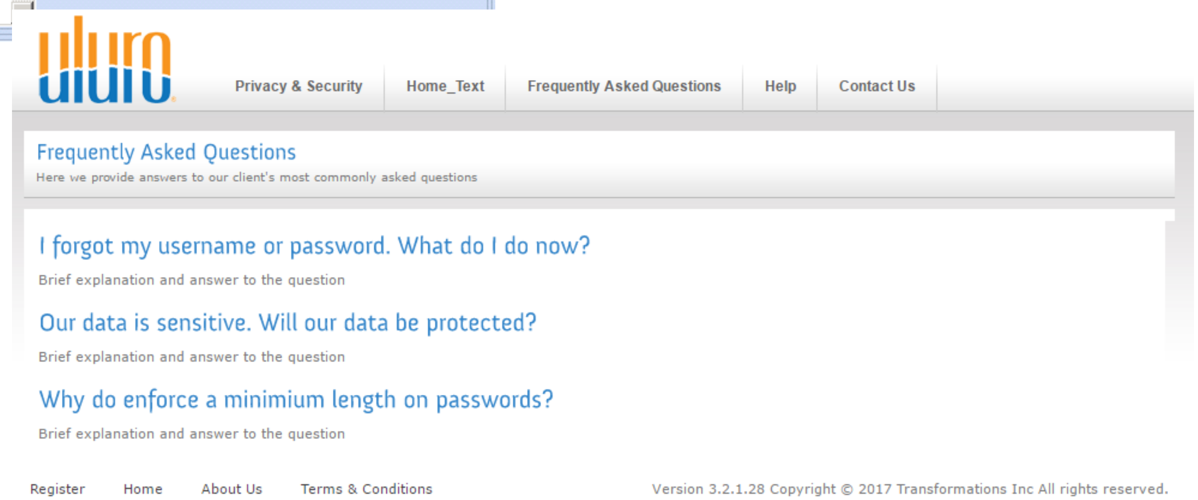
FAQ



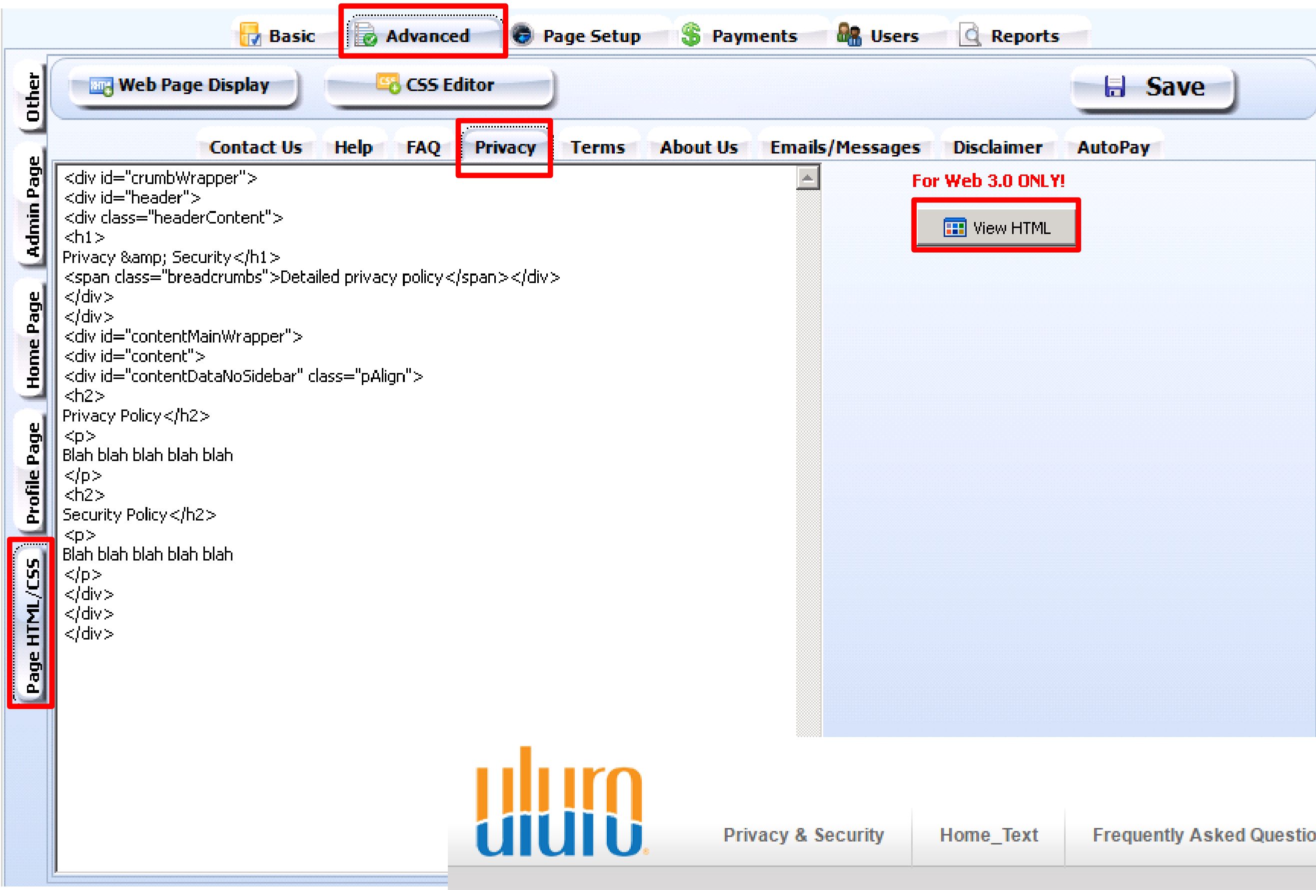
Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:



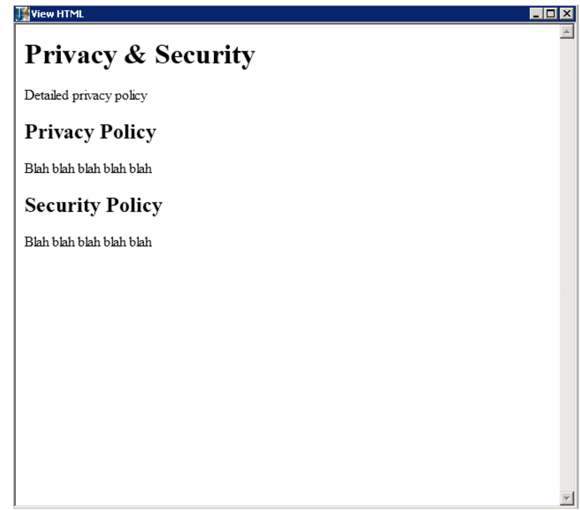
Click the link on the main site page to view the linked page users will be directed to:



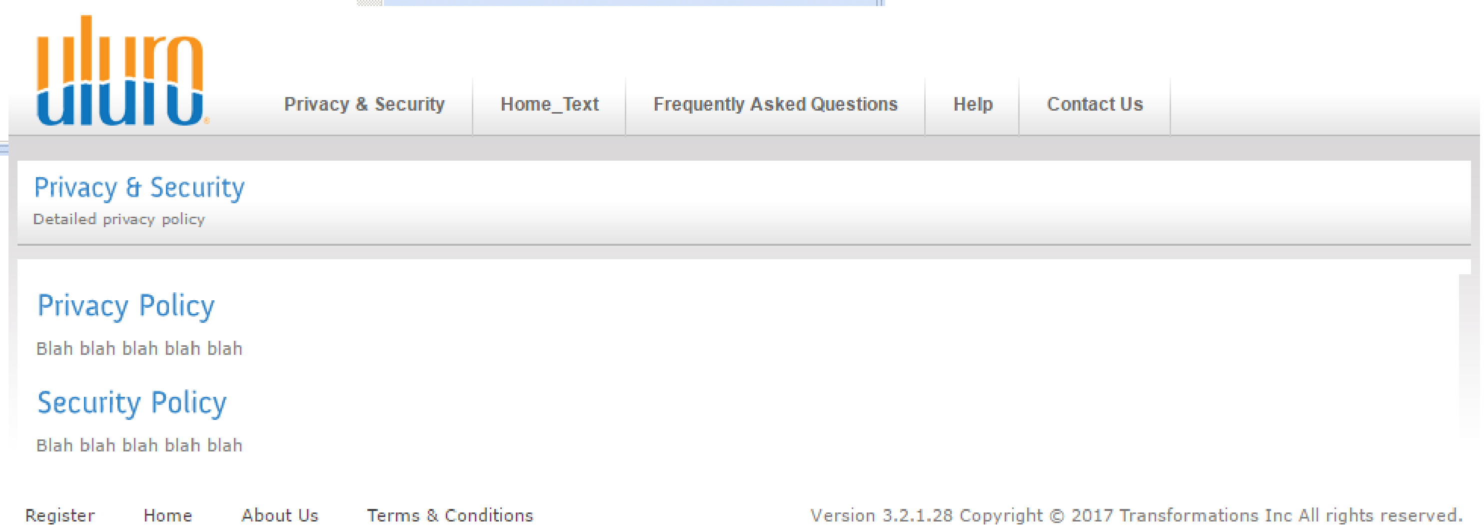
Privacy



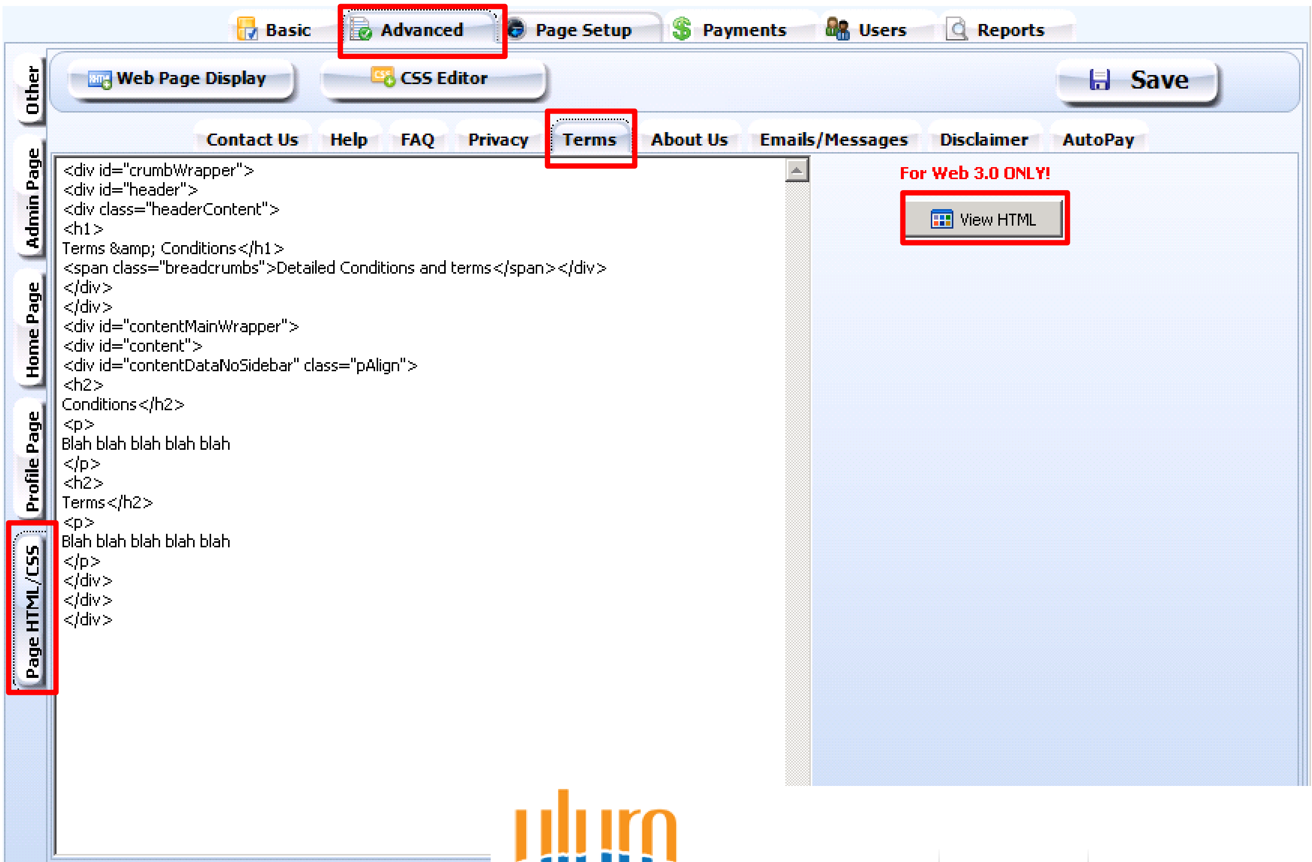
Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:



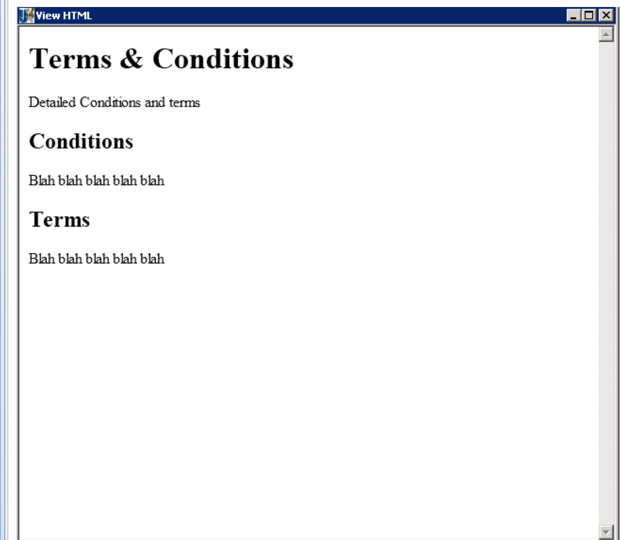
Click the link on the main site page to view the linked page users will be directed to:



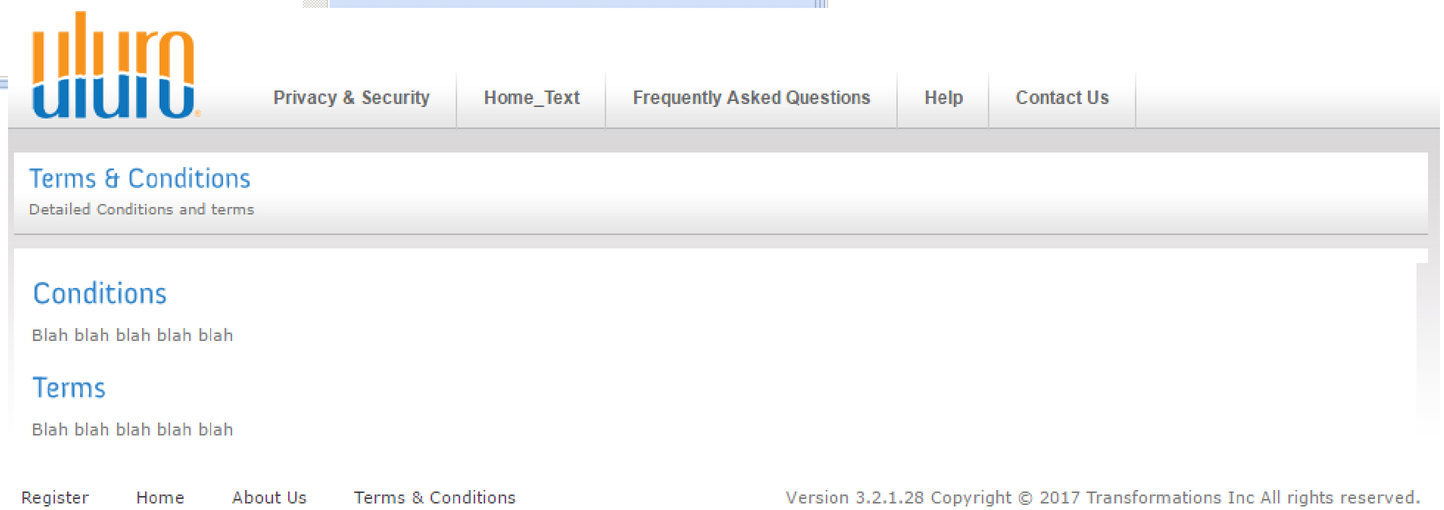
Terms



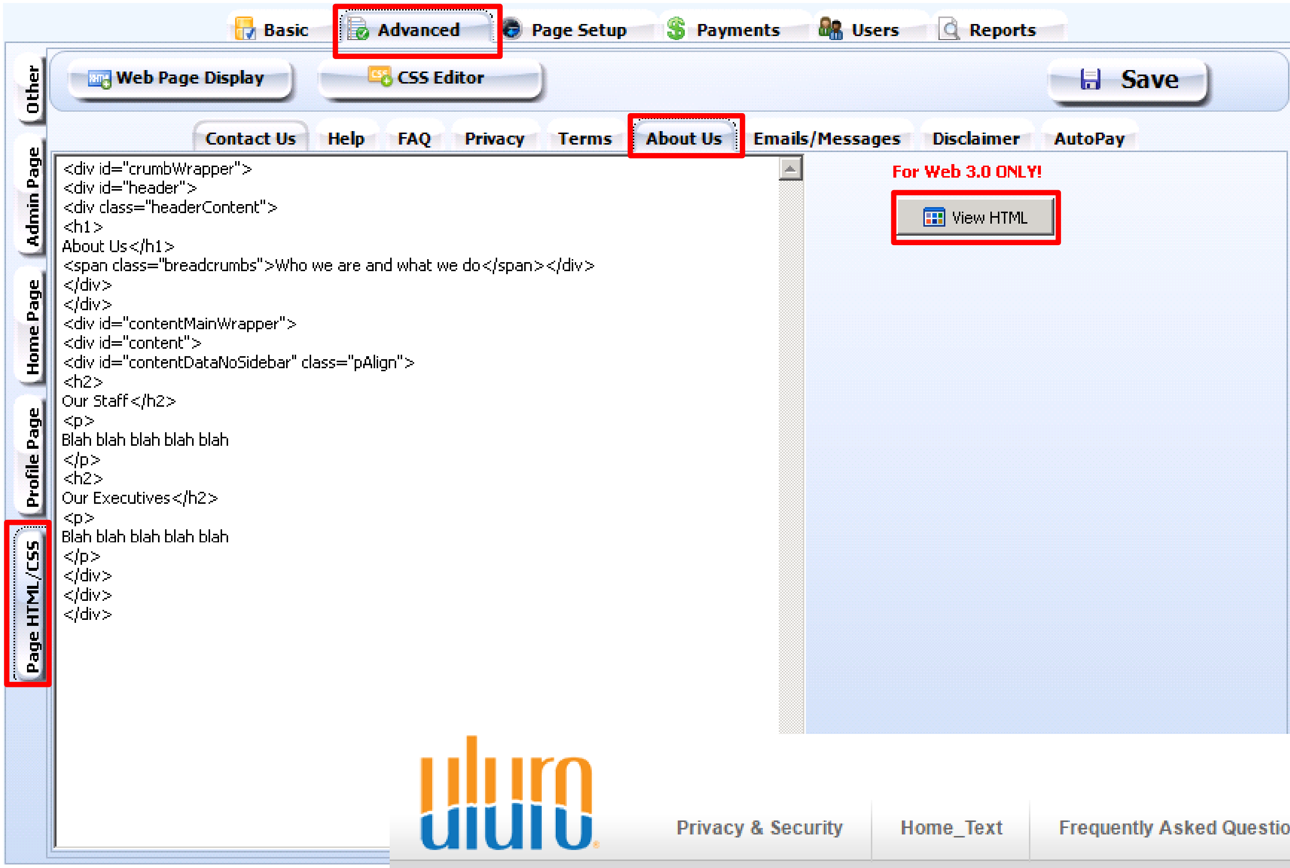
Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:



Click the link on the main site page to view the linked page users will be directed to:

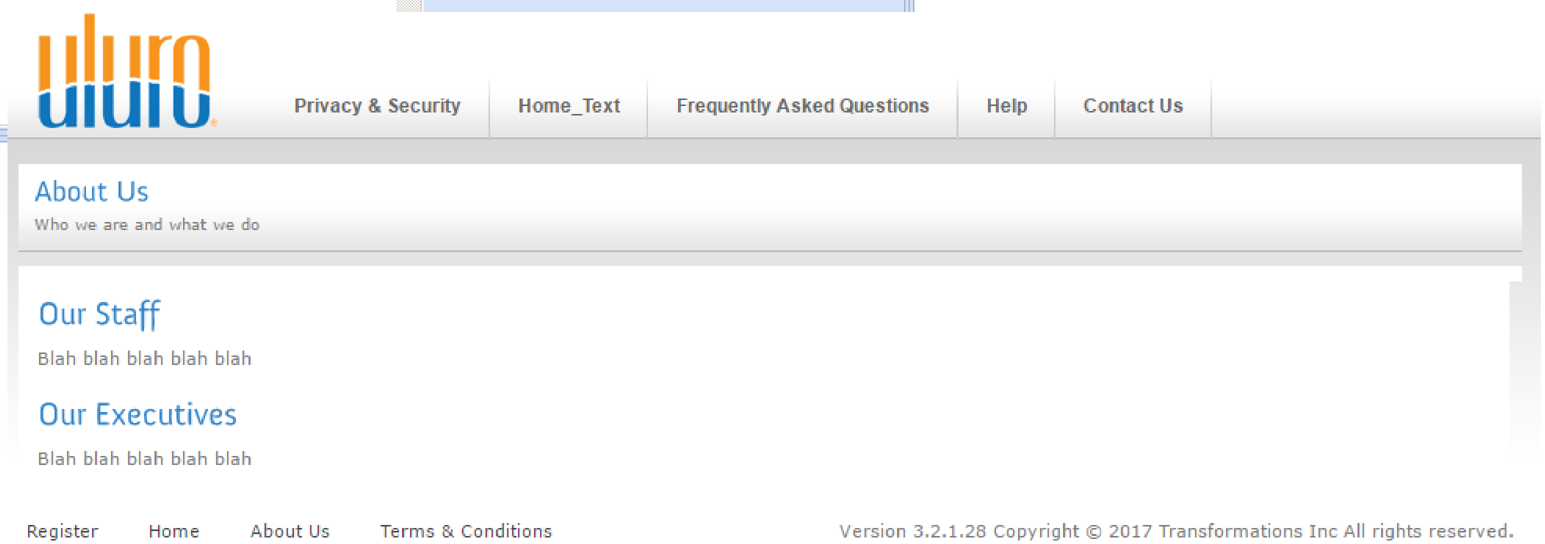


About Us



Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:

Click the link on the main site page to view the linked page users will be directed to:

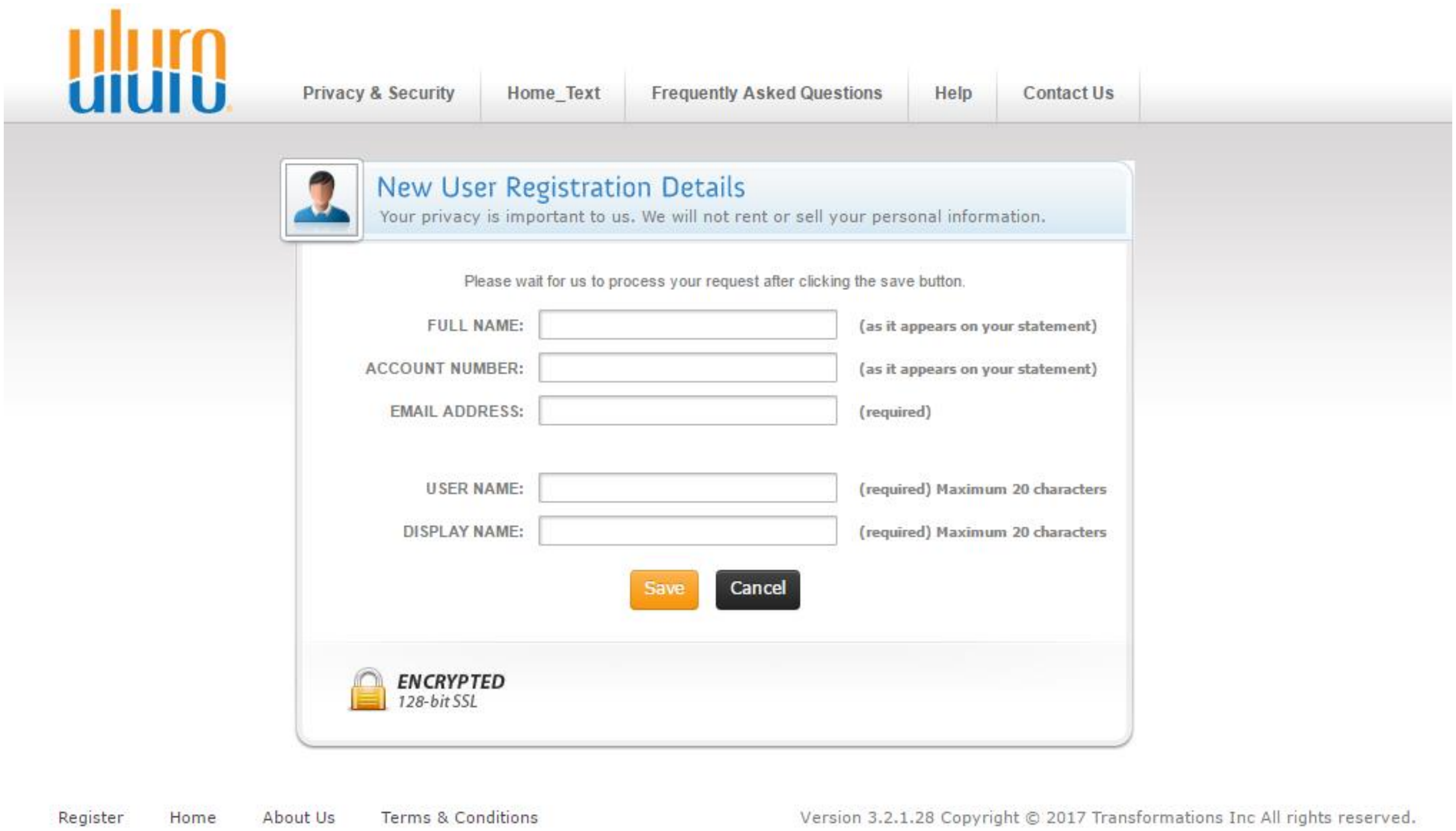


Home

This cannot be edited; this is to bring users back to the main site when the links redirect them to other pages. This can be disabled but not edited.

Register

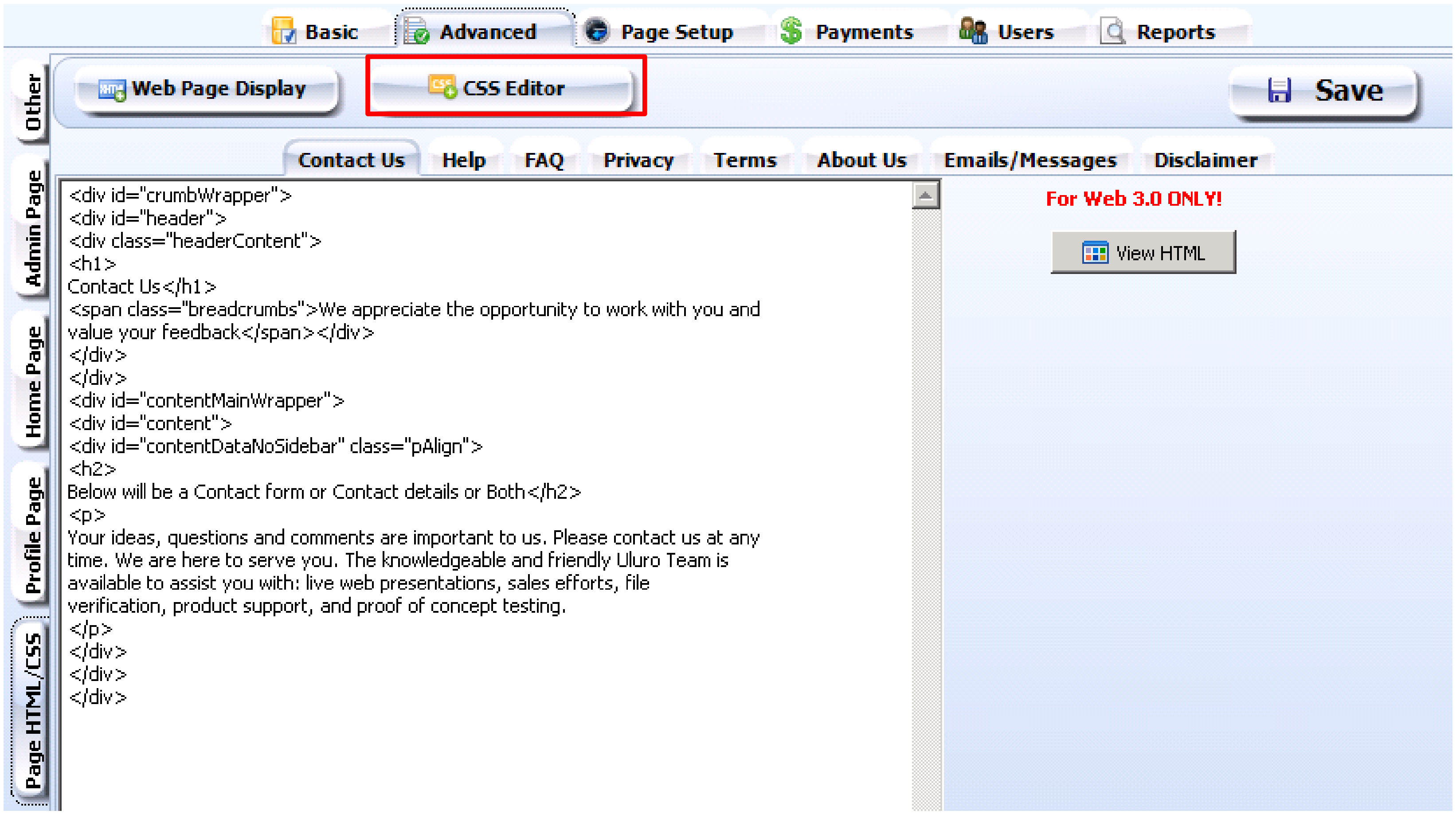
Click the link on the main site page to view the linked page users will be directed to:



See New Password/Registration Verification to edit the self-registration page that users are redirected to when clicking Register.

CSS Editor

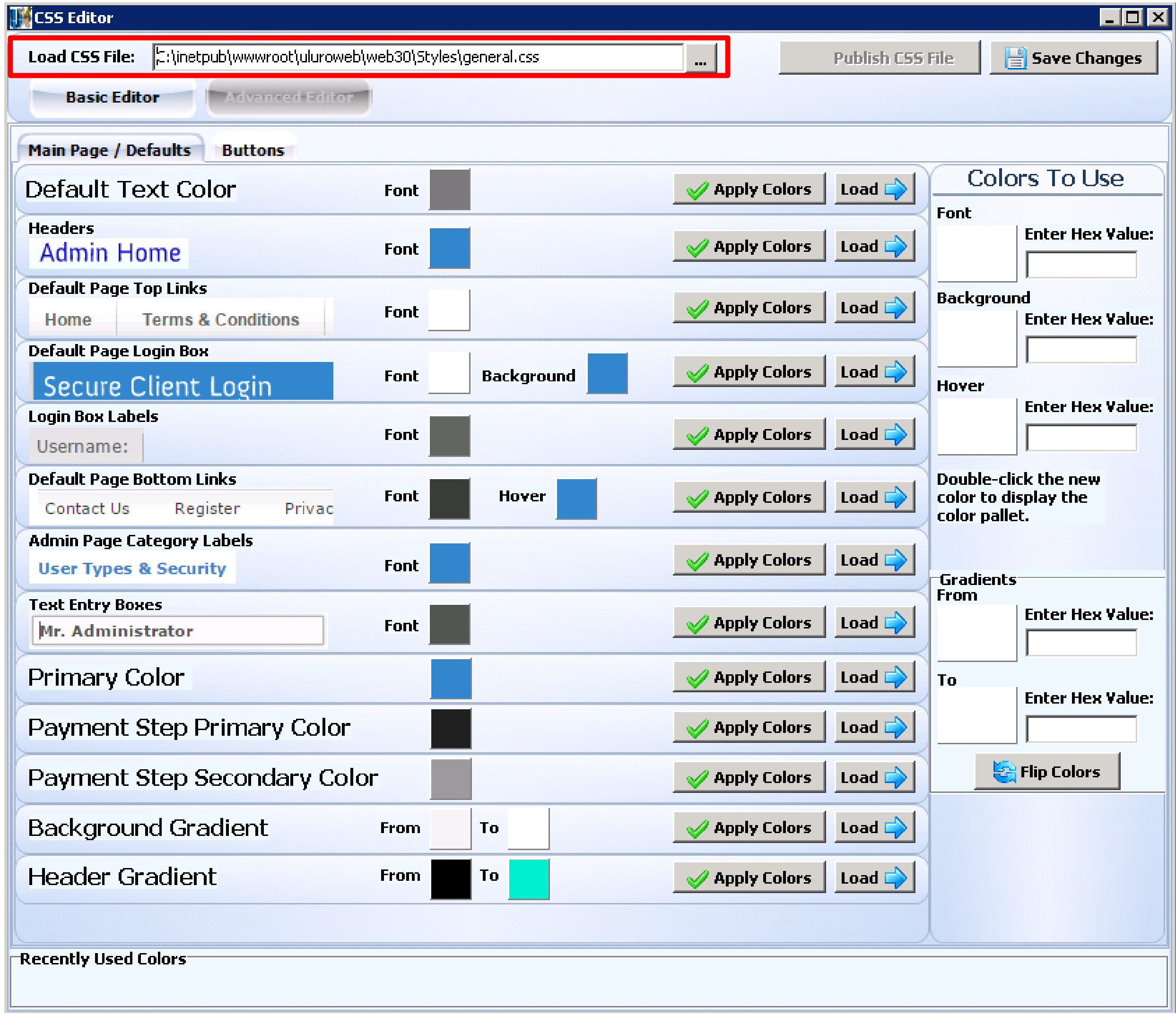
Click on CSS Editor in the Advanced web setup tab to edit the CSS for the site. The Web CSS File will always be Default.css to start with.



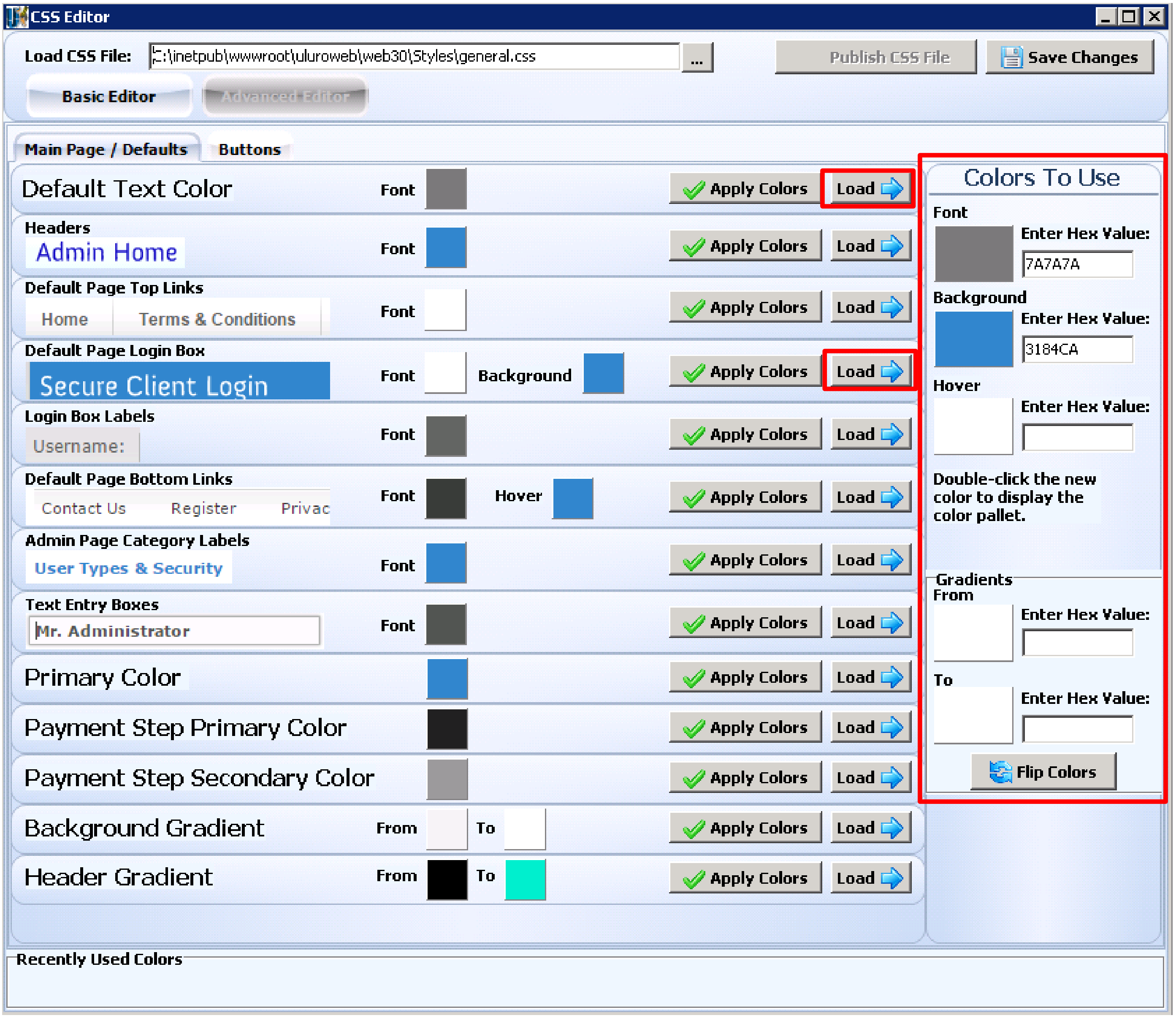
Load the CSS file you wish to edit. If a custom CSS has not been created previously for this site, choose the general.css file from the styles folder located in the web 30 directory.

Tips from Transformations:

Do not edit the default.css within the Styles folder. The site uses a referential CSS; it is a CSS file that calls a different CSS file. You will edit the general CSS not the default CSS. We put the default on the site as the one that references the general CSS file. So when editing, select general.css



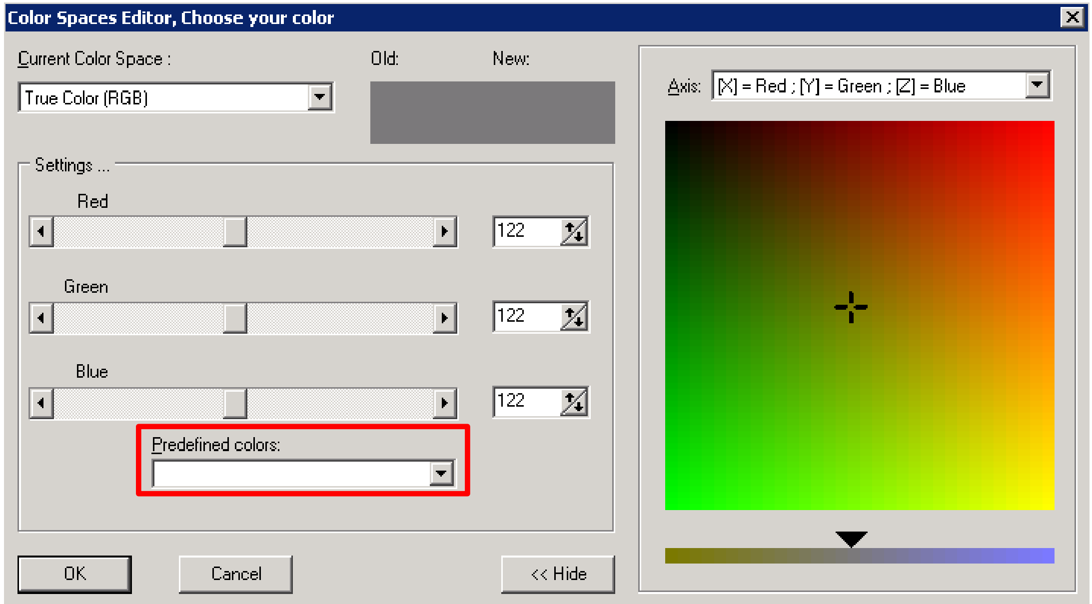
To edit the color of a background or font for the Main Page/Defaults click the Load button for the color that you wish to change. The font, bakcground, hover, or gradient color you loaded will be displayed in the Colors to Use Section.

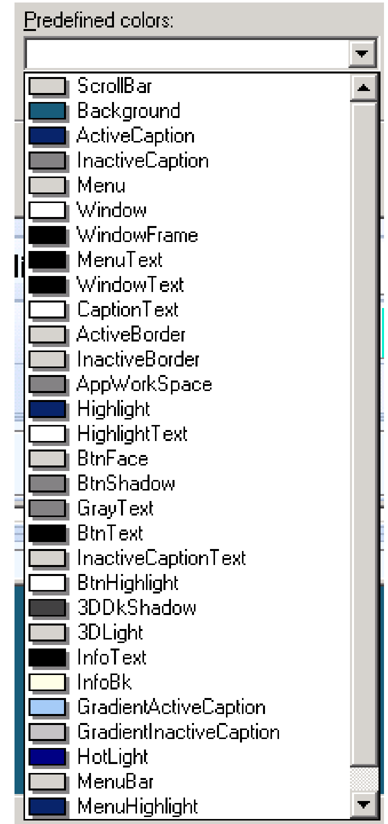


Edit the colors by entering the Hex value or double click the color square to adjust the color using the RGB values or by dragging the arrows along the axis.

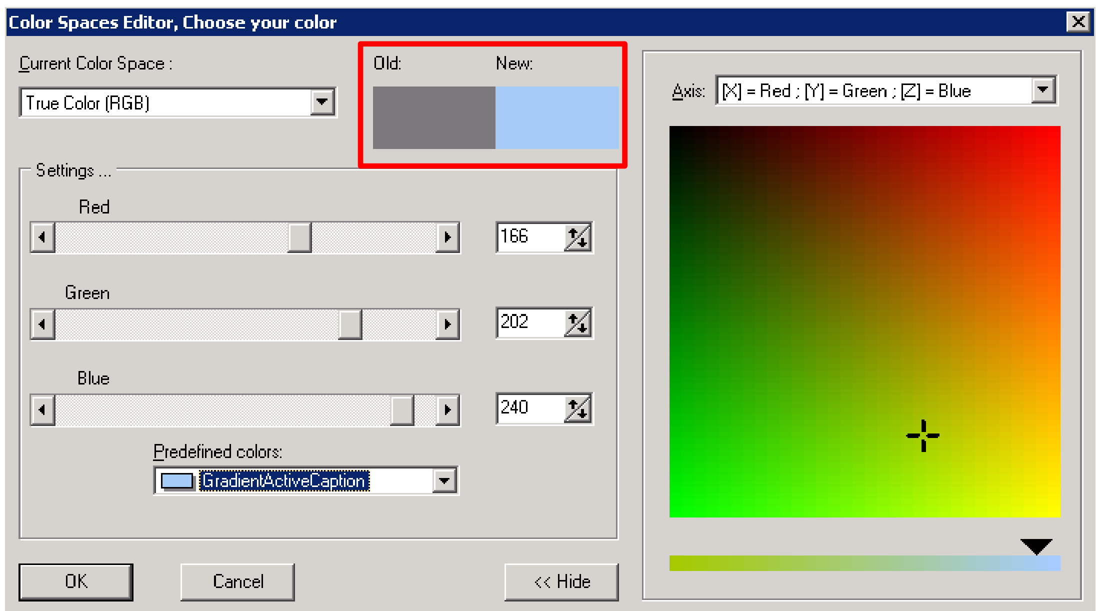
The predifined colors dropdown allows you to select from some of the default colors.

The old and new color are shown so that you can compare the color change.

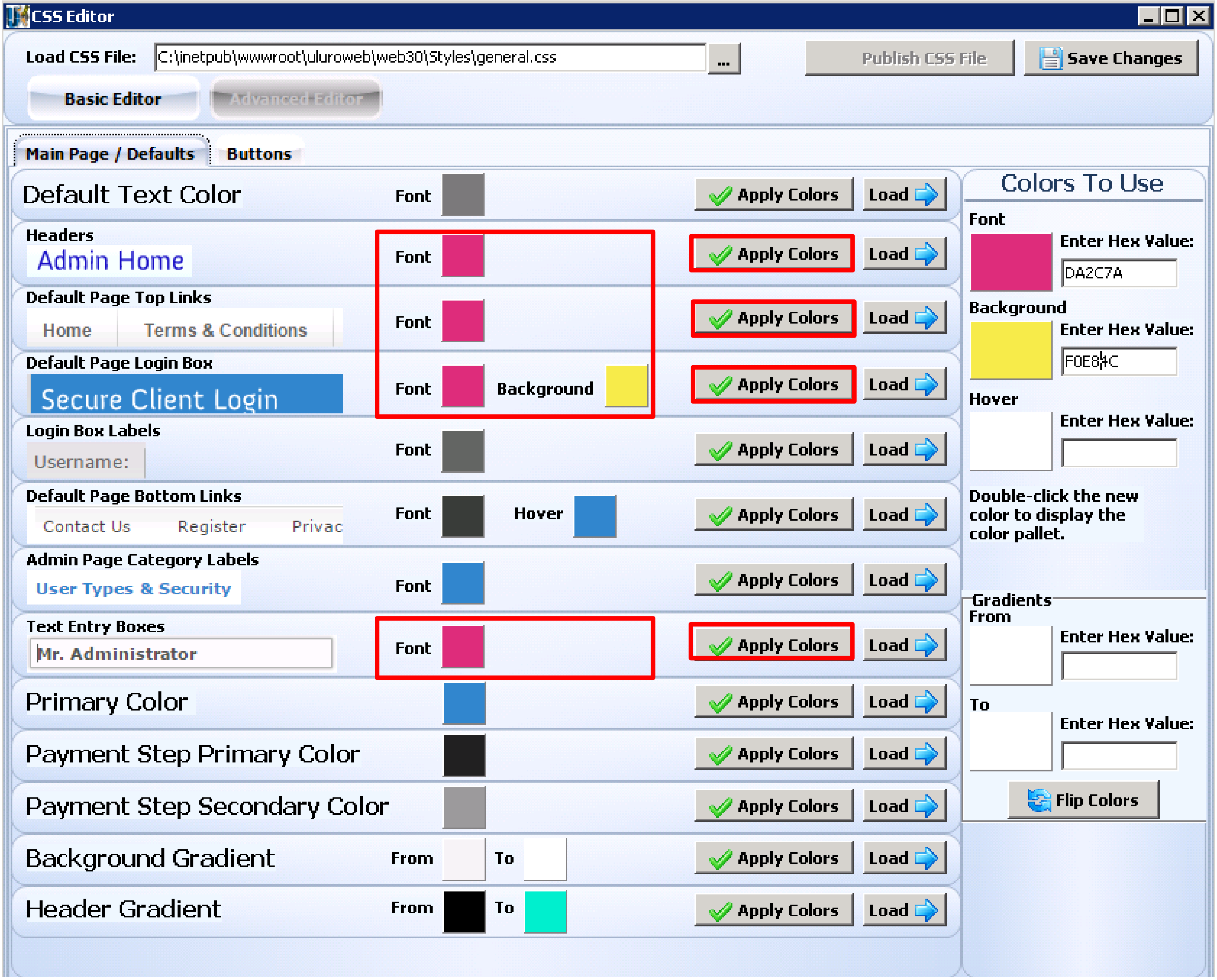




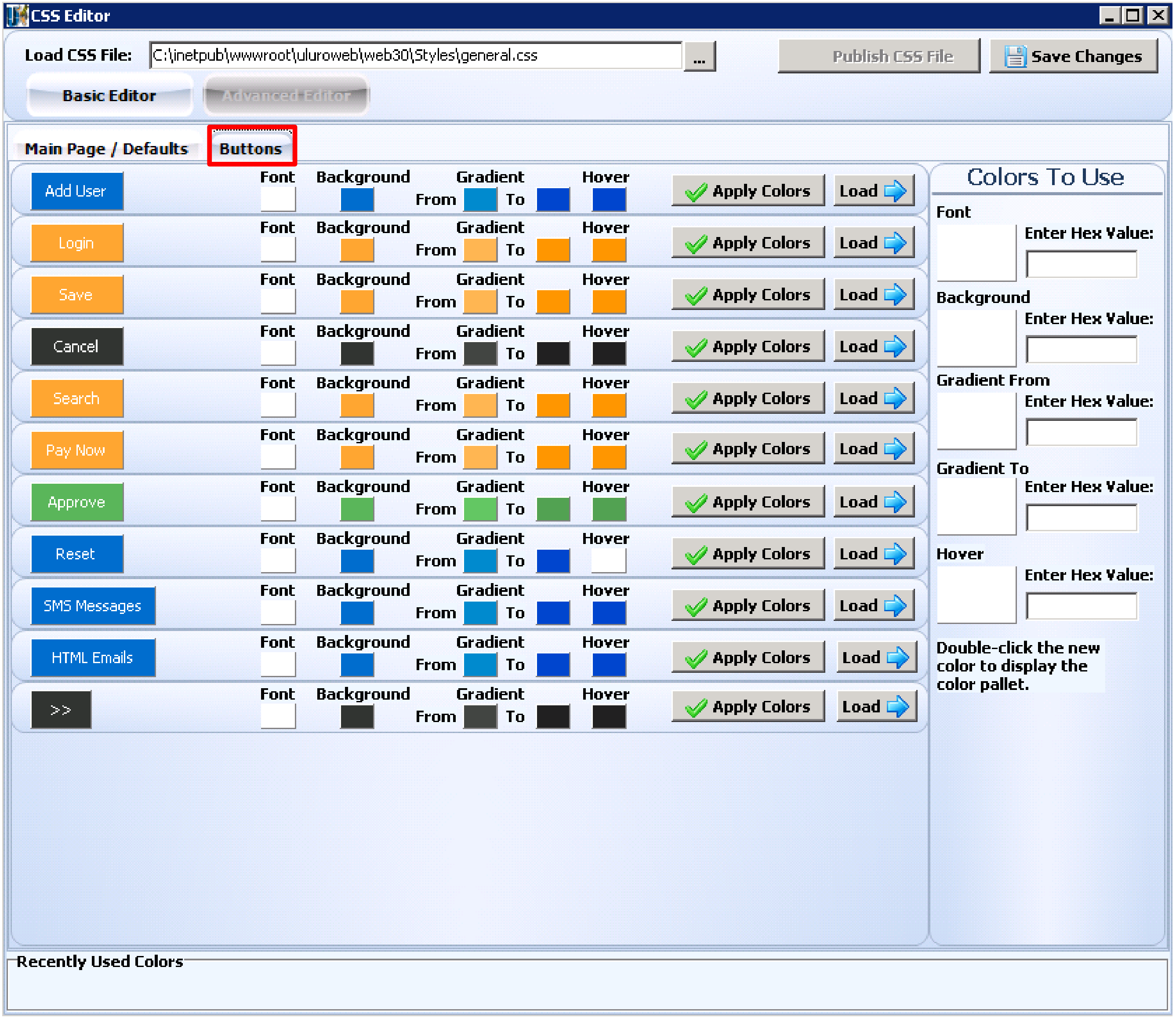
The predefined colors list is determined by Windows.



Once a new color is selcted, click on the Apply Colors button for as many of the items you wish to now be the colors in the Colors to Use section. You will see the color updated .

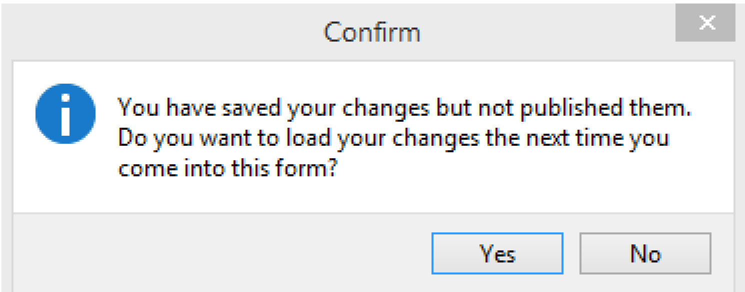


The color of the buttons are edited the same way that the Main Page/Default colors were edited. Use the load button to select the color for the Colors to Use section. Edit the color and clcik Apply colors for the change to take effect.



Saving Changes

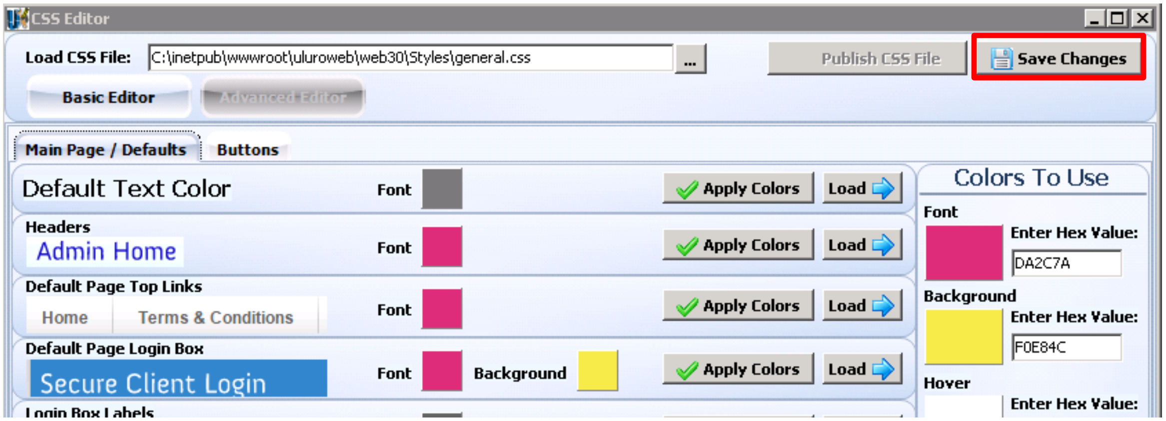
Anytime during the process, you can save your changes by clicking on the Save Changes button. The changes are saved locally to a temporary file and ARE NOT VIEWABLE ON THE WEB! However, if you need to exit the editor, the program will tell you that you have saved your changes and not published them. It will ass "Do you want to load these changes the next time you come into the form?" This will allow you to make changes but switch to other processes without losing your work.

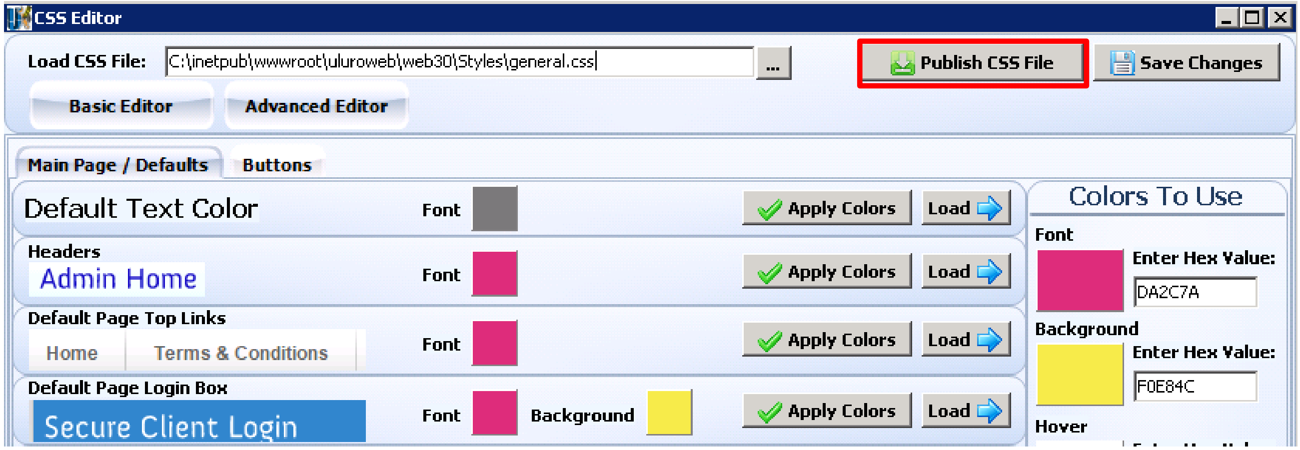


When the color changes to the CSS are complete, click on Save Changes at the top.

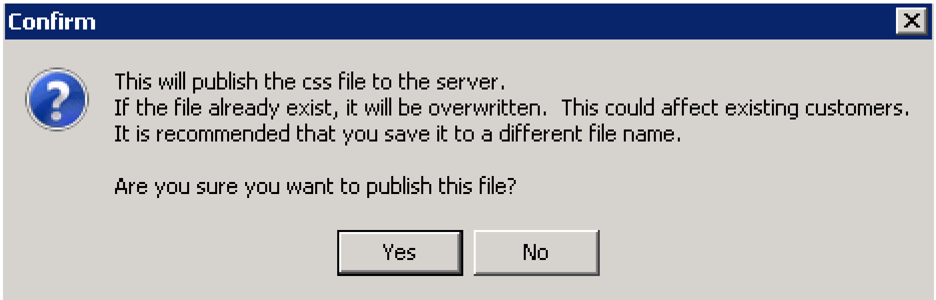
You will now be able to click on Publish CSS File.

Publishing your changes will copy all your saved changes to a CSS file for use on the web. You should publish the files to the web 30 directory in the Styles folder. For you to view the changes on the web, the files must be put in that folder. The customer you are currently in will have their Default CSS changed to the newly created files.



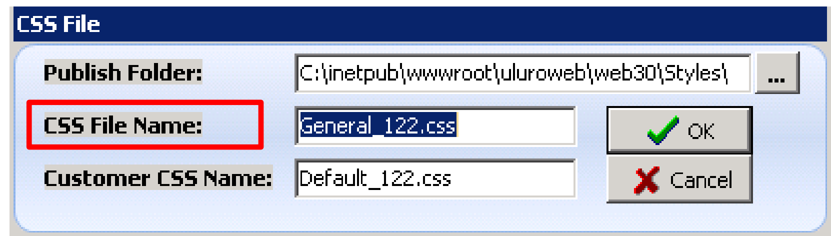


You will be asked to Confirm the changes before publishing:



Click yes to publish. This will create a new default and general CSS with the CLID at the end of the name (default_122.css and general_122.css for example).

The new CSS file will be saved in your Styles folder in the Web 30 directory unless you specify a different folder/file name here.

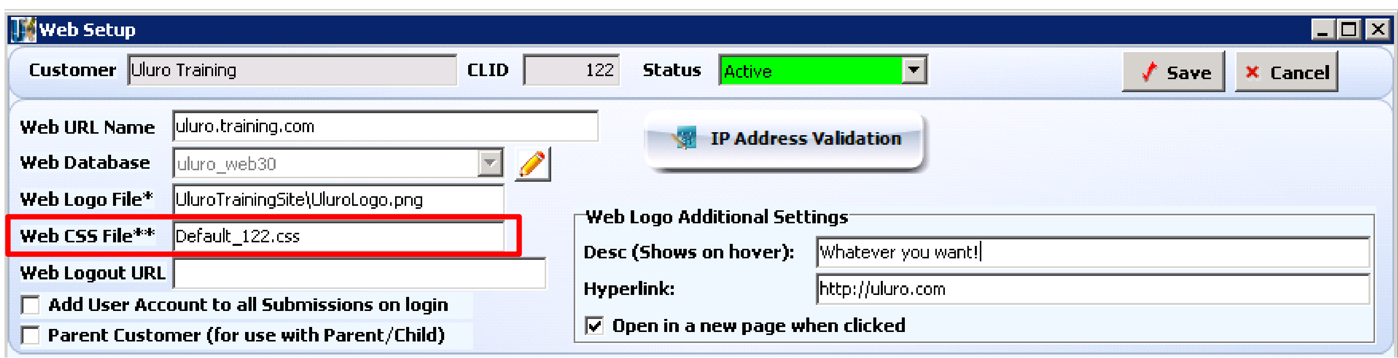


Tips from Transformations:

You should never overwrite the default.css or generl.css files. All changes should be saved as a new custom CSS using the _CLID naming structure. If you overwrite a CSS that another CLID is using, their site will be effected by the new CSS.

If you log back into the site, you will now see the CSS changes.

The Web CSS File will automatically be updated for this client within the web setup:

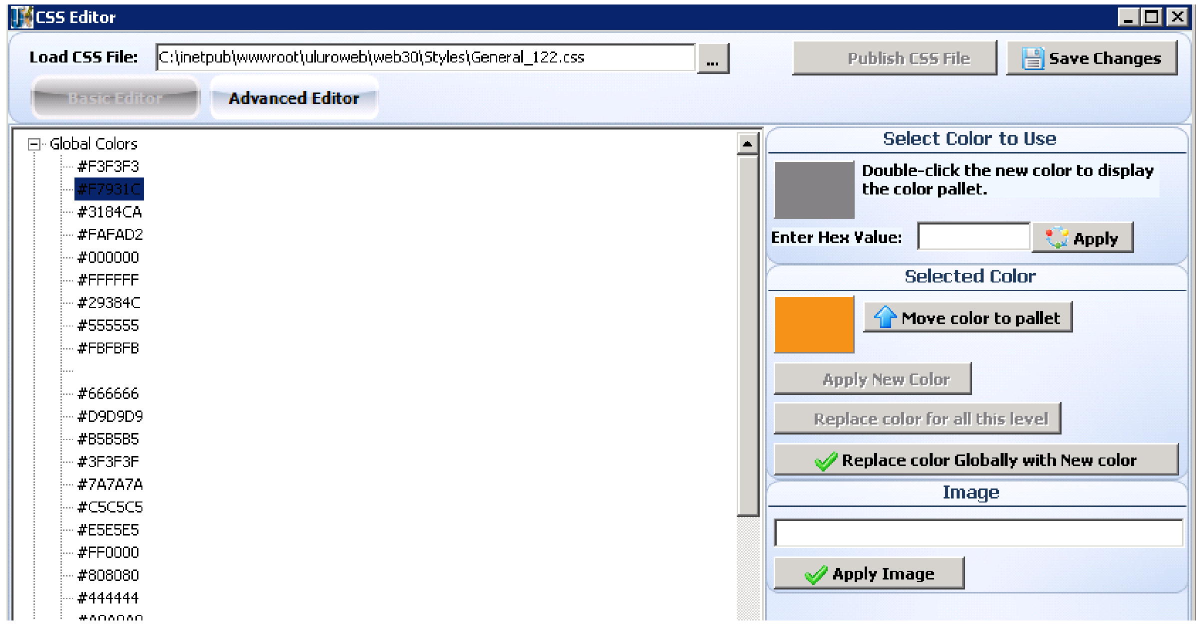


Advanced Editor

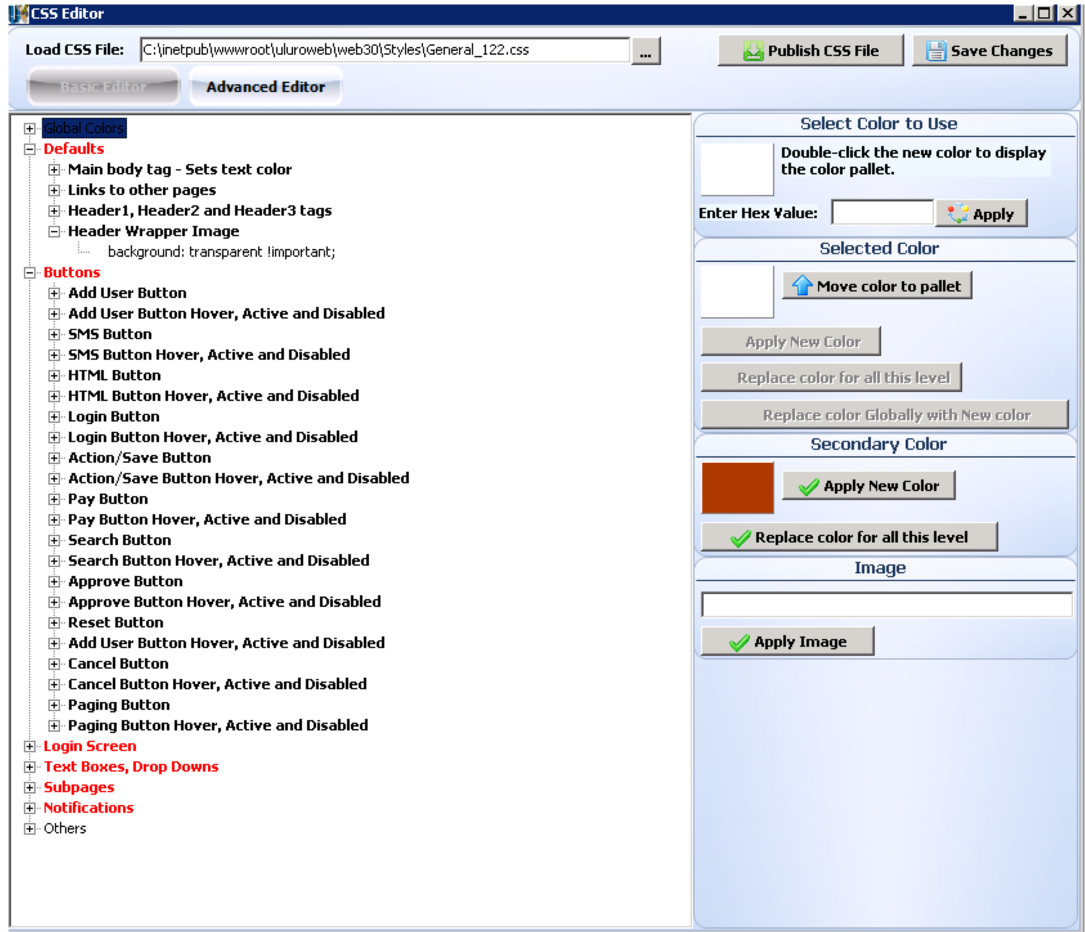
The advanced editor only becomes available once you publish a CSS file. This should only be used by those experienced with CSS.

Global Colors

Select your color from the tree, then select a color in the Color to Use area. You can double click to edit the color or enter the hex value. Then click Replace Color Globally with New Color. This will change the old color to the new one ***everywhere***.



Non-Global Colors



To use the advanced editor, choose a color from the "tree", then select a color in the Color to Use area, then click on the Apply New Color.

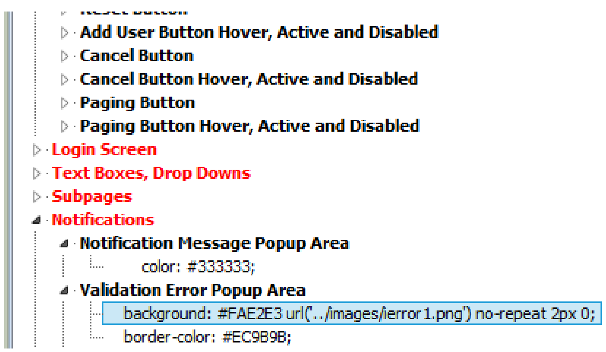
Click Move color to pallet to move the selected color into the Colot to Use section. Once there, you can edit the color and click apply to apply changed for that setting.

Gradients will have secondary colors. Click Apply New Color to move the color from the top to the Selected Color or Secondary Color area.

You can replace the color for all levels by selecting the item under the category and clicking on Replace Color for all this level.

You can change the image that is used for an item by selecting an image area and then changing the name of the image. If the image does not exist, the web will not show it. You are responsible for creating the image.

Apply the image name.



Once color changes have been made, Save and Publish just as you did within the basic CSS Editor.

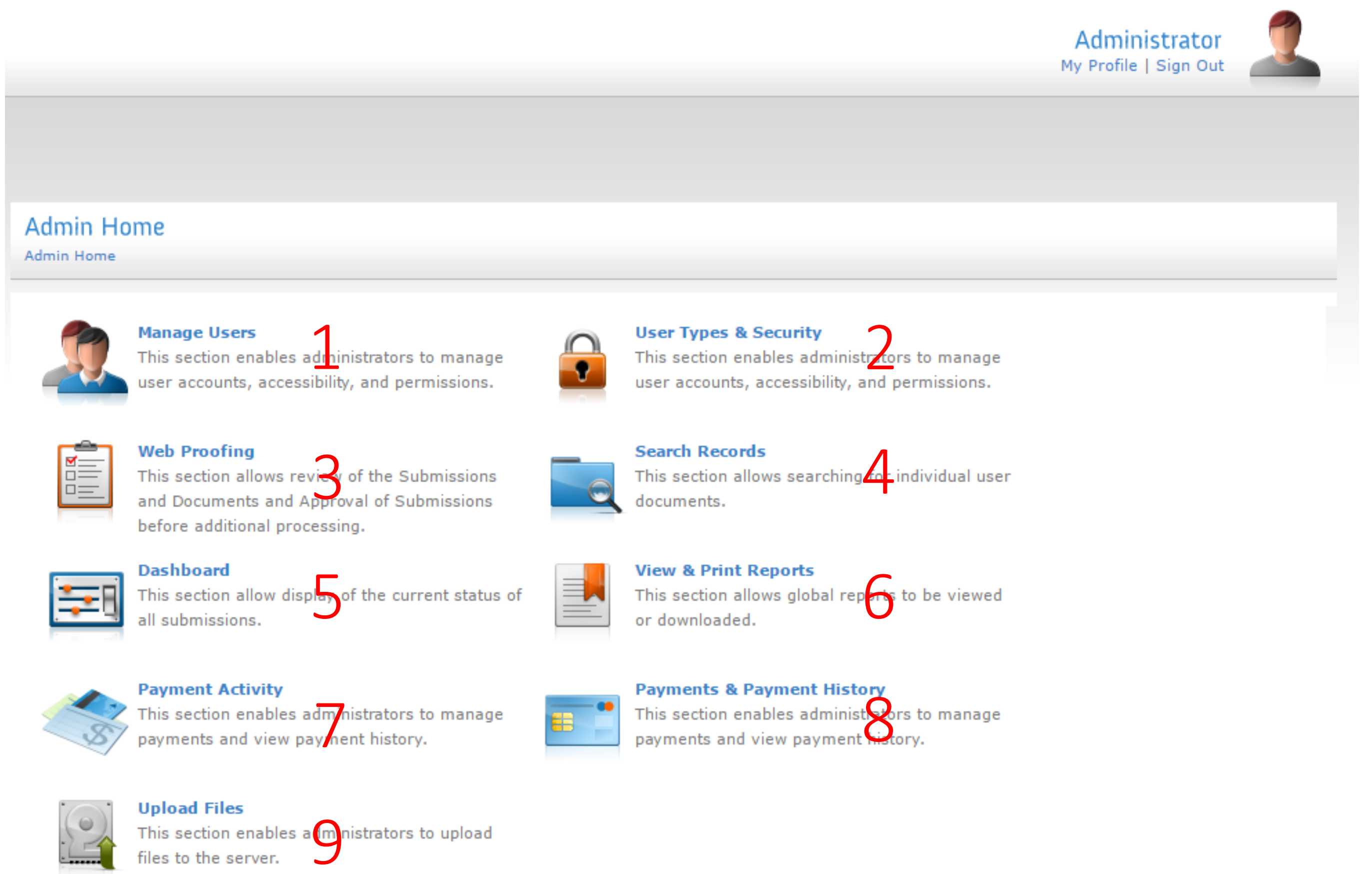
Admin Main Page (Advanced tab)

This is the main page that the admin sees once logging into the site.

An admin user by default has access to the following:

- [Manage Users]
- [User Types & Security]
- [Web Proofing]
- [Search Records]
- [Dashboard]
- [View & Print Reports]
- Payment Activity
- Payments & Payment History
- [Upload Files]

Reference the uPayments Manual for Payment Actvity and Payments & Payment History features.



The position, text, images, etc for each of thse can be edited under the Advanced tab in a client's web setup. Select Admin Page along the left side.

Web Page – This is grayed out and cannot be edited. This is the page the admin user will be directed to when clicking the link on the Admin Home Page. Each of these has a specific function so these pages cannot be altered.

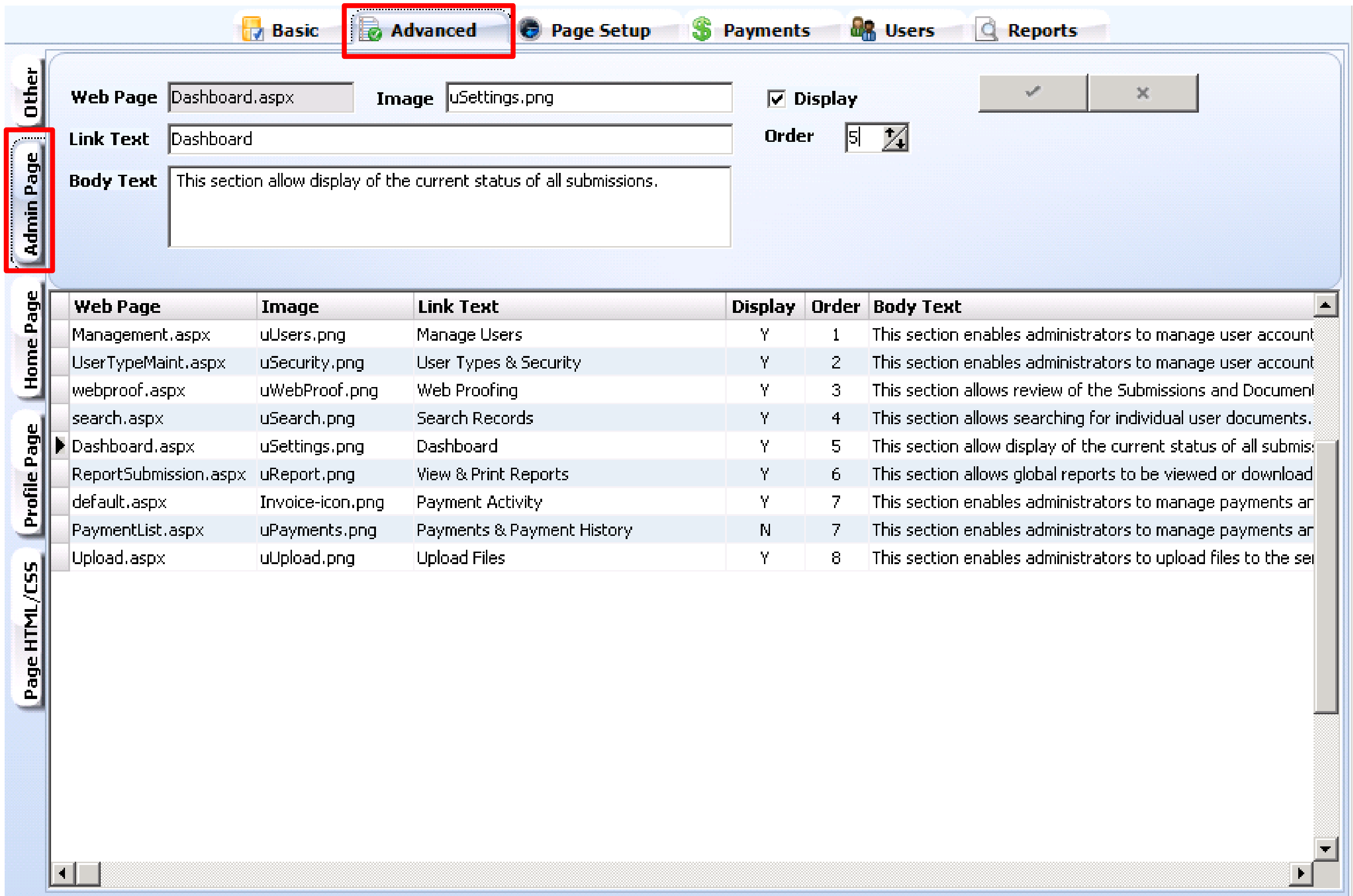
Image – This is the image displayed to the left of each option. The relative path being used to the **Images** folder in your web 30 directory, for example: C:\inetpub\wwwroot\uluroweb\web30***Images***\ (Note: If you hover over the image in the directory, it tells you the pixel size for the image.)

Link Text – This is the heading text displayed for each option that the user will click to select each.

Body Text – This is the text below the heading that describes the functionality of each link.

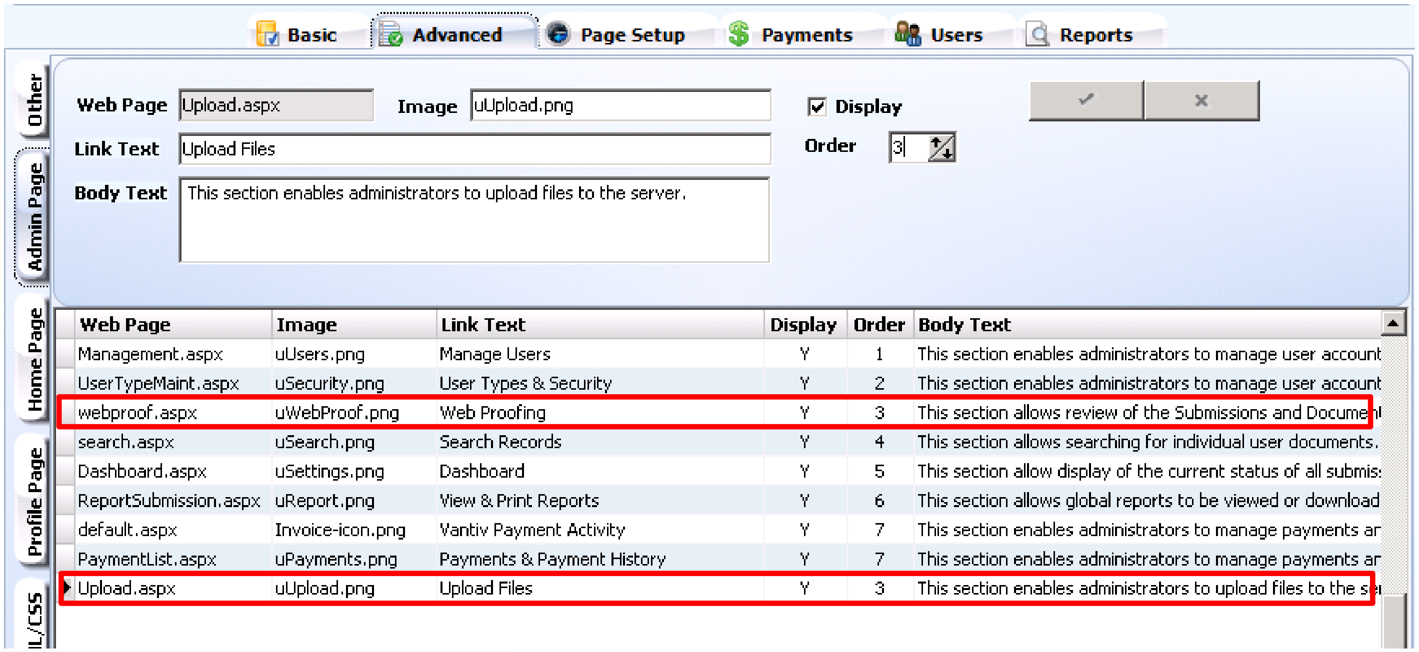
Display – Check to enable for the admin user to see it on the Admin Home page.

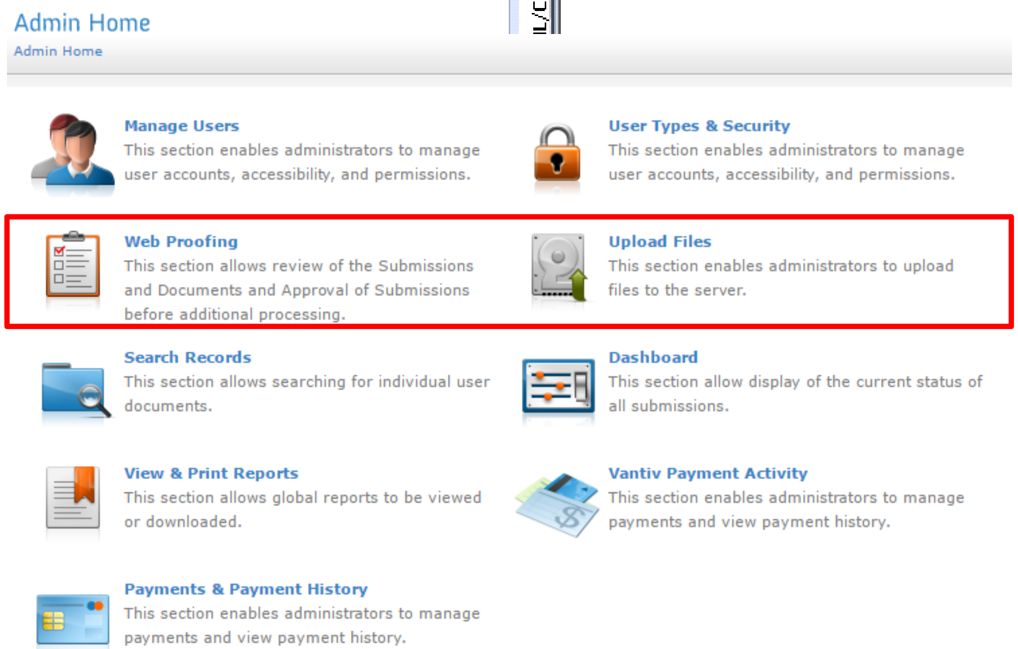
Order – This will be the order that the options are displayed on the Admin Home Page.



If two of the web pages have the same order number, then the first in the list will take the order slot and the other will Having two that are 1 in order, it will place the most recent edit in 1 and shift the next 1 to order 2 and so forth down the line.

Web Proofing is on order 3, Upload is bumped to 4 because it is listed after Web Proofing in the list. The other orders 4-7 get moved one order accordingly behind Upload Files.





Tips from Transformations:

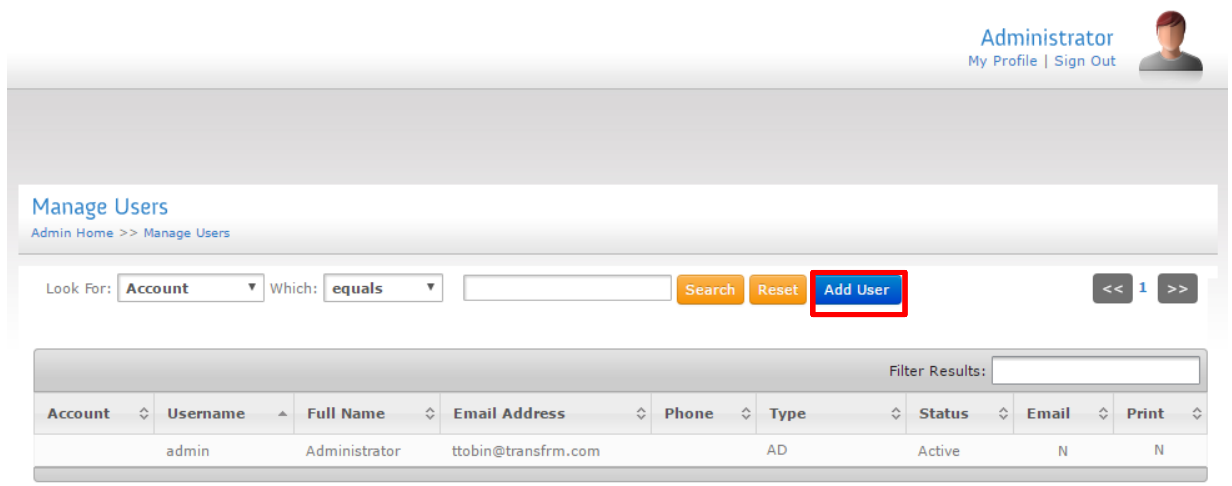
These settings can all be disabled under an admin user’s securoity settings as well. They must be enabled in both to be seen by the user. Disabled here or security will make it disappear from the page.

User Types & Security should NEVER be disabled for an admin user.

See User Type Security Settings document for more information on security settings for users.

Manage Users

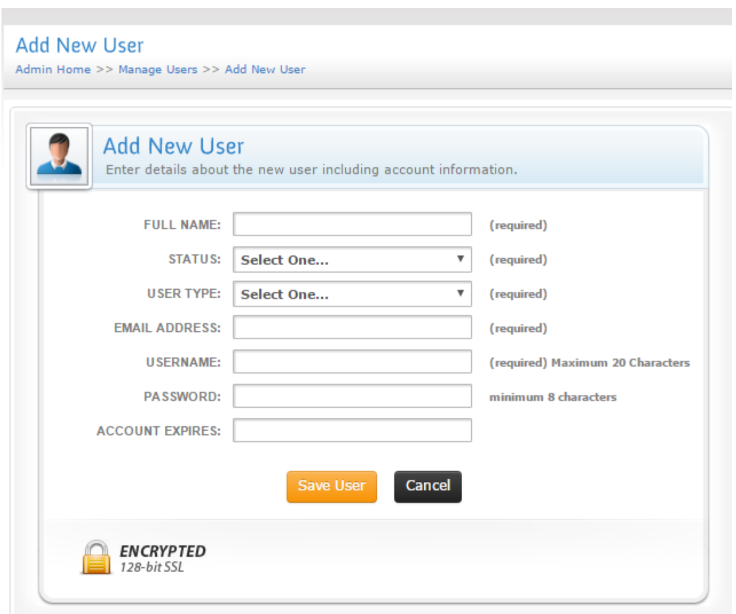
From the Admin Home Page, select Manage Users. This is where an admin user can create a user or edit the settings and profile of an individual user.

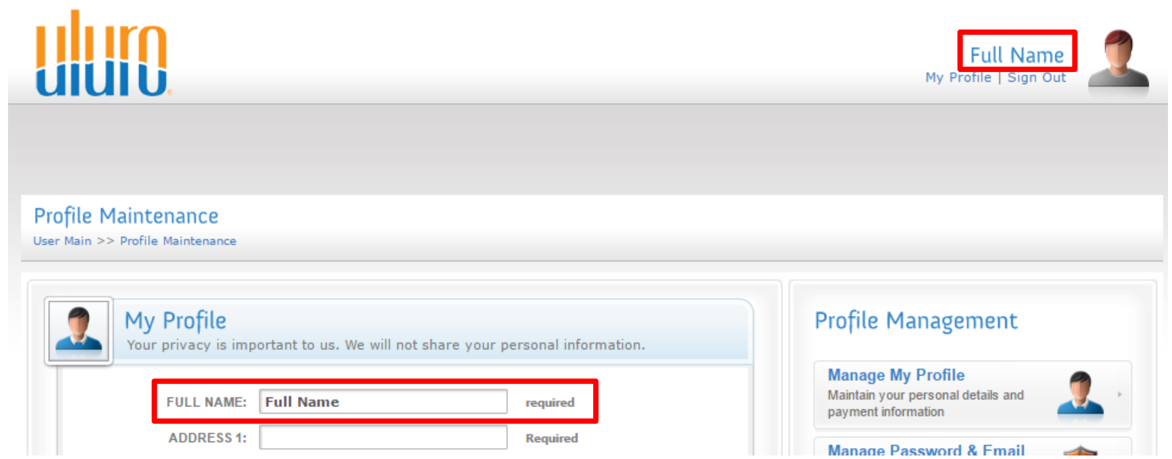


Create a new user

Click the Add User button.

Full Name – This will be saved in the user's profile as well as displayed on every page after the user signs into the site.





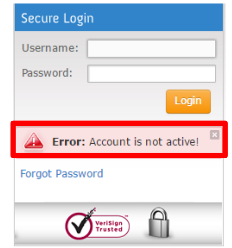
Status – This should be active when creating a new user. If the others are selected users will not be notified of their account nor will users be able to login to the site.

Active – Users are able to login

New – Users that have self-registered but have yet to login to the site to finish the registratin process.

Inactive – User cannot login; The user will receive an error that the account is not active.

Unenrolled – User cannot login; The user will receive an error that the account is not active.



User Type – The dropdown will list the default user types as well as any that have been created in User Types & Security. The default users are AD – Administrators, CS – Customer Service, and UR – Standard User. Select the user type for the user being created. The user will take on all security settings of the user type selected.

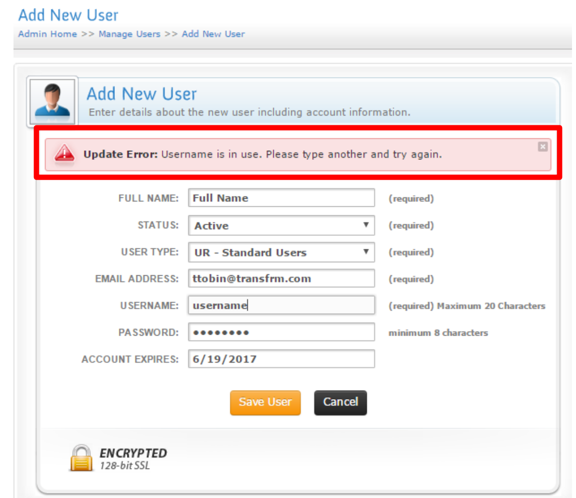
Email Address – This will become the primary email saved to the user's profile. This is also the email address that the Enrollment email will be sent to.

Username – This must be unique for each user on the site. If it is already in use, you will get an error.

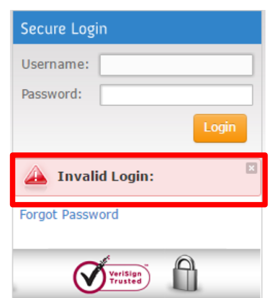
Password – This can be anything that abides by the password settings.

Tips from Transformations:

If using a standard password setup for initial users such as firstname_lastname you can include that in the enrollment email with the site and login information for that user.

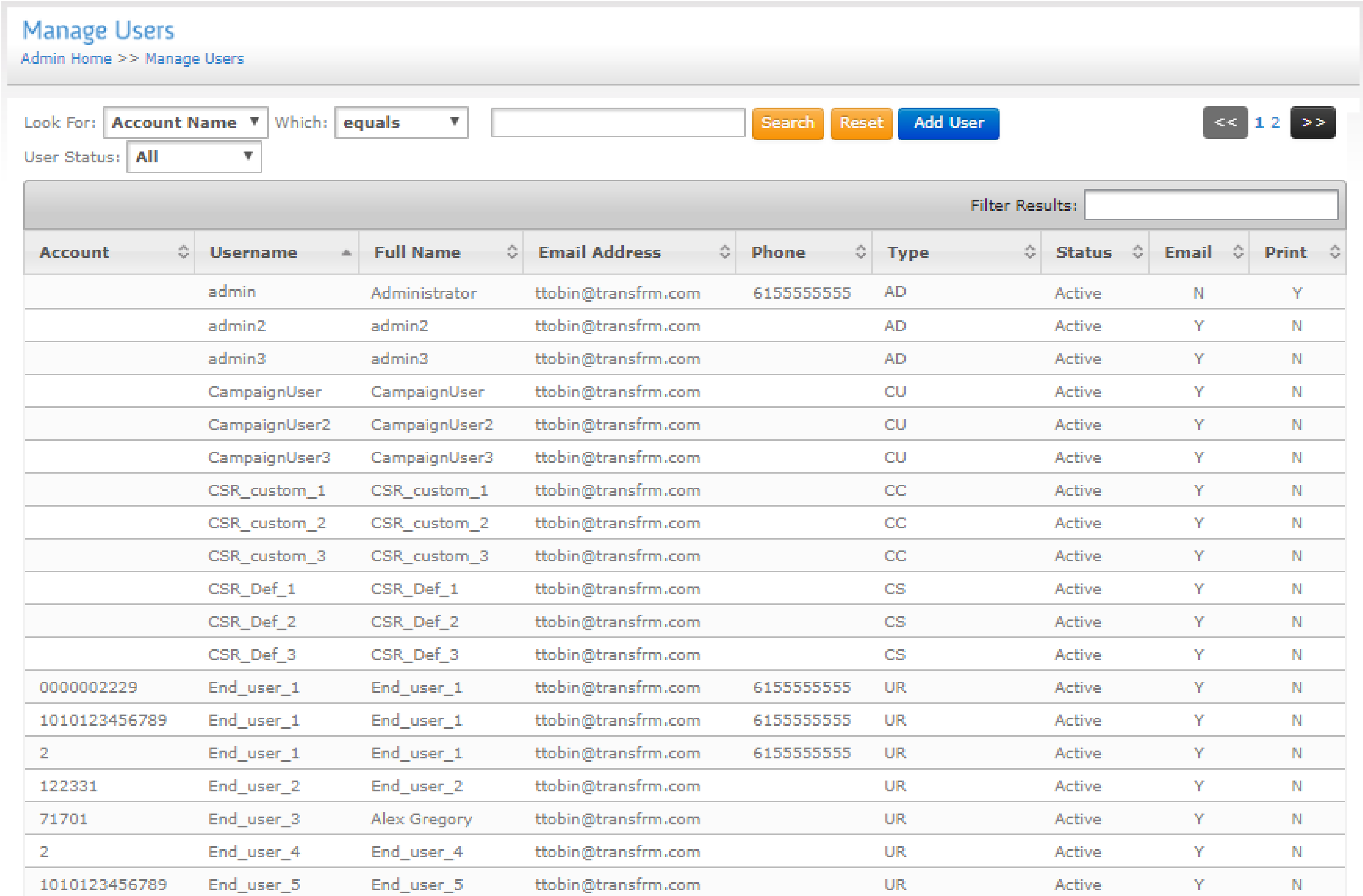


Account Expires – Select a date that the account should become expired. Leave it blank if the user account should never expire. After the date entered here, the user will get an Invalid Login error when attempting to login. Only an admin user can change the account expiration date in the user's profile to avoid expiration or once expired.



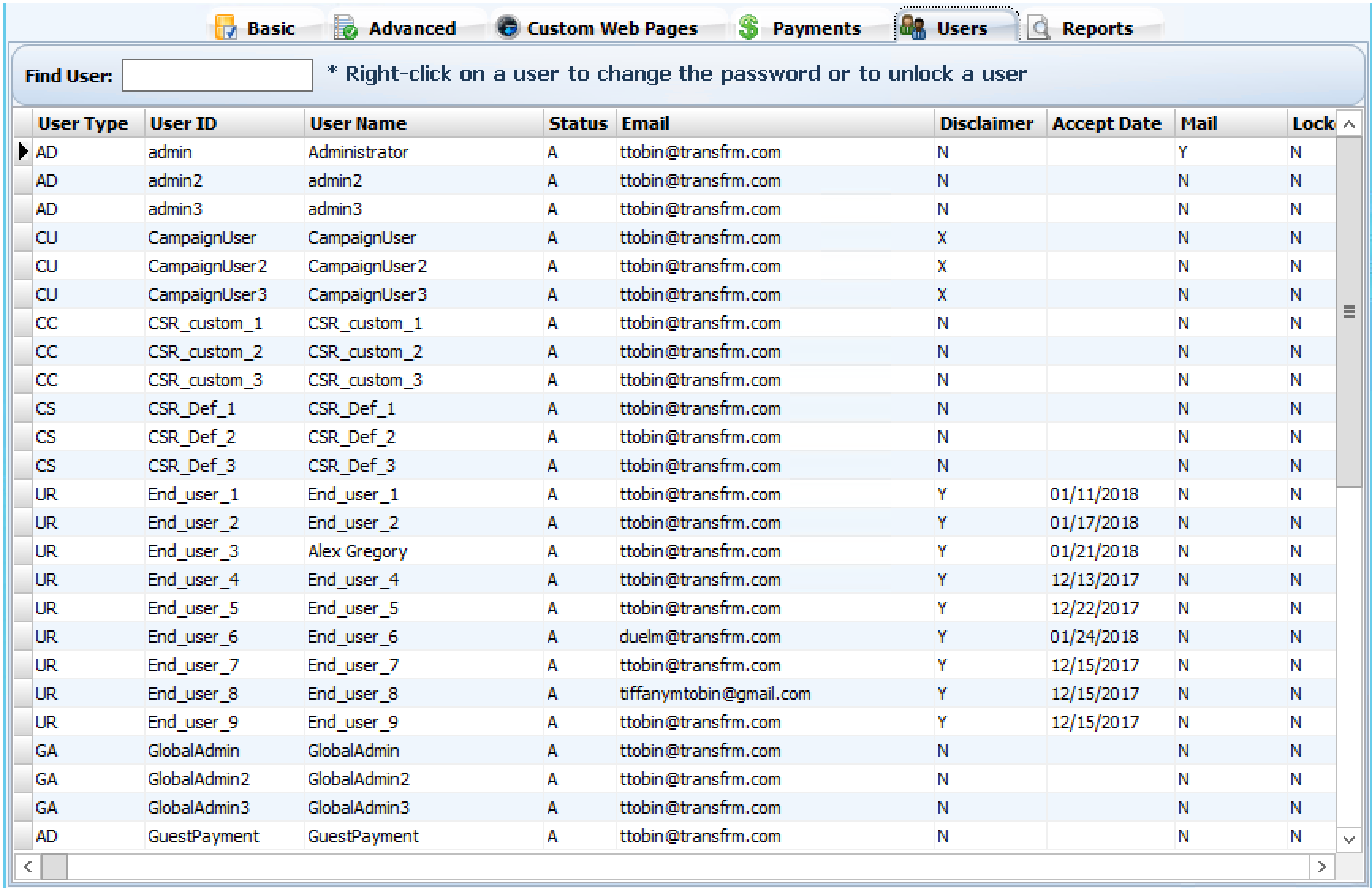
Save the user. The user will receive an enrollment email.

All of the users for a site will be listed under Manage Users.



Account	Username	Full Name	Email Address	Phone	Type	Status	Email	Print
	admin	Administrator	ttobin@transfrm.com	6155555555	AD	Active	N	Y
	admin2	admin2	ttobin@transfrm.com		AD	Active	Y	N
	admin3	admin3	ttobin@transfrm.com		AD	Active	Y	N
	CampaignUser	CampaignUser	ttobin@transfrm.com		CU	Active	Y	N
	CampaignUser2	CampaignUser2	ttobin@transfrm.com		CU	Active	Y	N
	CampaignUser3	CampaignUser3	ttobin@transfrm.com		CU	Active	Y	N
	CSR_custom_1	CSR_custom_1	ttobin@transfrm.com		CC	Active	Y	N
	CSR_custom_2	CSR_custom_2	ttobin@transfrm.com		CC	Active	Y	N
	CSR_custom_3	CSR_custom_3	ttobin@transfrm.com		CC	Active	Y	N
	CSR_Def_1	CSR_Def_1	ttobin@transfrm.com		CS	Active	Y	N
	CSR_Def_2	CSR_Def_2	ttobin@transfrm.com		CS	Active	Y	N
	CSR_Def_3	CSR_Def_3	ttobin@transfrm.com		CS	Active	Y	N
0000002229	End_user_1	End_user_1	ttobin@transfrm.com	6155555555	UR	Active	Y	N
1010123456789	End_user_1	End_user_1	ttobin@transfrm.com	6155555555	UR	Active	Y	N
2	End_user_1	End_user_1	ttobin@transfrm.com	6155555555	UR	Active	Y	N
122331	End_user_2	End_user_2	ttobin@transfrm.com		UR	Active	Y	N
71701	End_user_3	Alex Gregory	ttobin@transfrm.com		UR	Active	Y	N
2	End_user_4	End_user_4	ttobin@transfrm.com		UR	Active	Y	N
1010123456789	End_user_5	End_user_5	ttobin@transfrm.com		UR	Active	Y	N

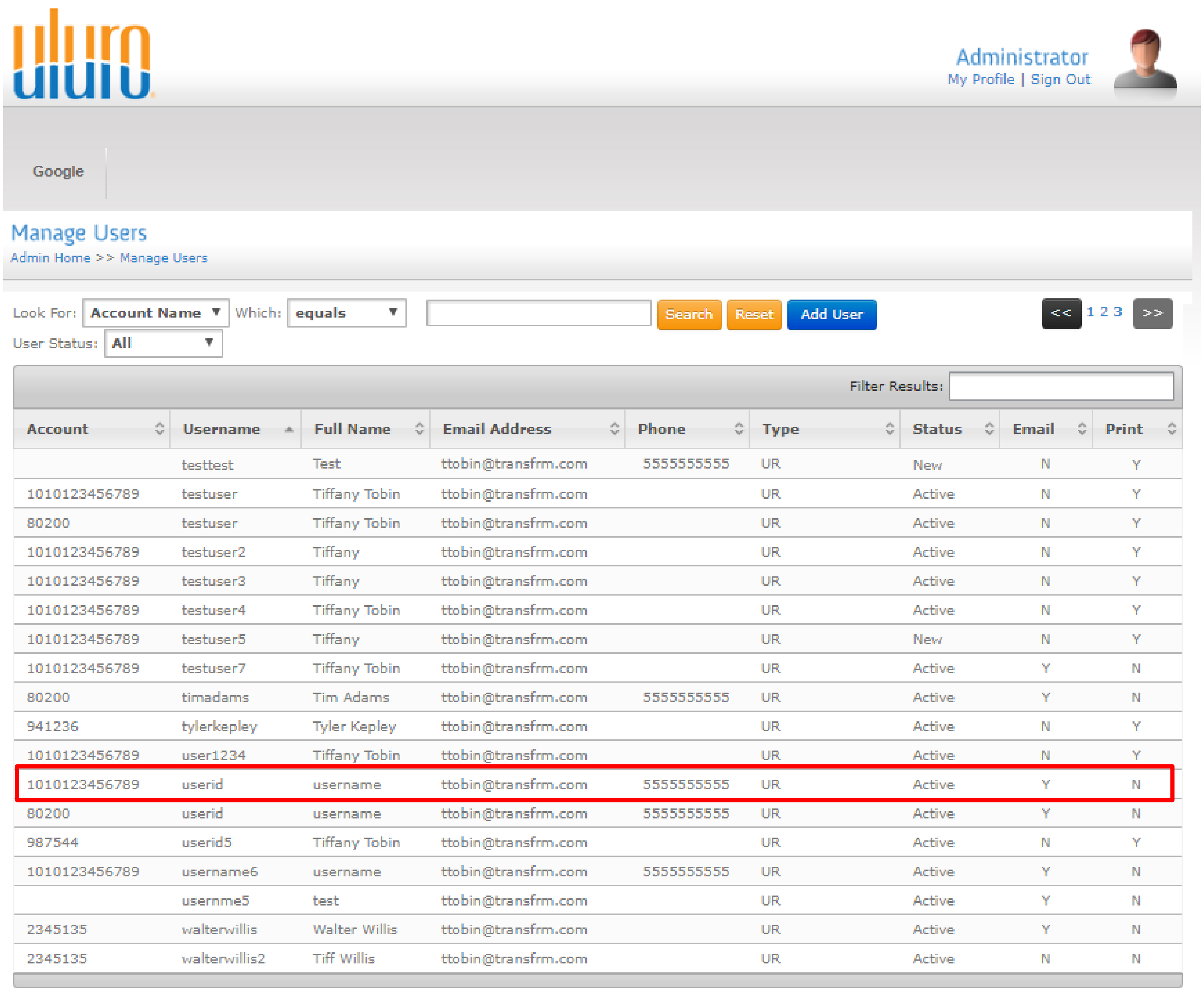
All of the users will also be listed under Web Setup for the client. Select the Users tab to see the entire list.



User Type	User ID	User Name	Status	Email	Disclaimer	Accept Date	Mail	Lock
AD	admin	Administrator	A	ttobin@transfrm.com	N		Y	N
AD	admin2	admin2	A	ttobin@transfrm.com	N		N	N
AD	admin3	admin3	A	ttobin@transfrm.com	N		N	N
CU	CampaignUser	CampaignUser	A	ttobin@transfrm.com	X		N	N
CU	CampaignUser2	CampaignUser2	A	ttobin@transfrm.com	X		N	N
CU	CampaignUser3	CampaignUser3	A	ttobin@transfrm.com	X		N	N
CC	CSR_custom_1	CSR_custom_1	A	ttobin@transfrm.com	N		N	N
CC	CSR_custom_2	CSR_custom_2	A	ttobin@transfrm.com	N		N	N
CC	CSR_custom_3	CSR_custom_3	A	ttobin@transfrm.com	N		N	N
CS	CSR_Def_1	CSR_Def_1	A	ttobin@transfrm.com	N		N	N
CS	CSR_Def_2	CSR_Def_2	A	ttobin@transfrm.com	N		N	N
CS	CSR_Def_3	CSR_Def_3	A	ttobin@transfrm.com	N		N	N
UR	End_user_1	End_user_1	A	ttobin@transfrm.com	Y	01/11/2018	N	N
UR	End_user_2	End_user_2	A	ttobin@transfrm.com	Y	01/17/2018	N	N
UR	End_user_3	Alex Gregory	A	ttobin@transfrm.com	Y	01/21/2018	N	N
UR	End_user_4	End_user_4	A	ttobin@transfrm.com	Y	12/13/2017	N	N
UR	End_user_5	End_user_5	A	ttobin@transfrm.com	Y	12/22/2017	N	N
UR	End_user_6	End_user_6	A	duelm@transfrm.com	Y	01/24/2018	N	N
UR	End_user_7	End_user_7	A	ttobin@transfrm.com	Y	12/15/2017	N	N
UR	End_user_8	End_user_8	A	tiffanymtobin@gmail.com	Y	12/15/2017	N	N
UR	End_user_9	End_user_9	A	ttobin@transfrm.com	Y	12/15/2017	N	N
GA	GlobalAdmin	GlobalAdmin	A	ttobin@transfrm.com	N		N	N
GA	GlobalAdmin2	GlobalAdmin2	A	ttobin@transfrm.com	N		N	N
GA	GlobalAdmin3	GlobalAdmin3	A	ttobin@transfrm.com	N		N	N
AD	GuestPayment	GuestPayment	A	ttobin@transfrm.com	N		N	N

Edit a User

Within the Manage Users page, admin users can edit various user settings. Select the user that you wish to edit.

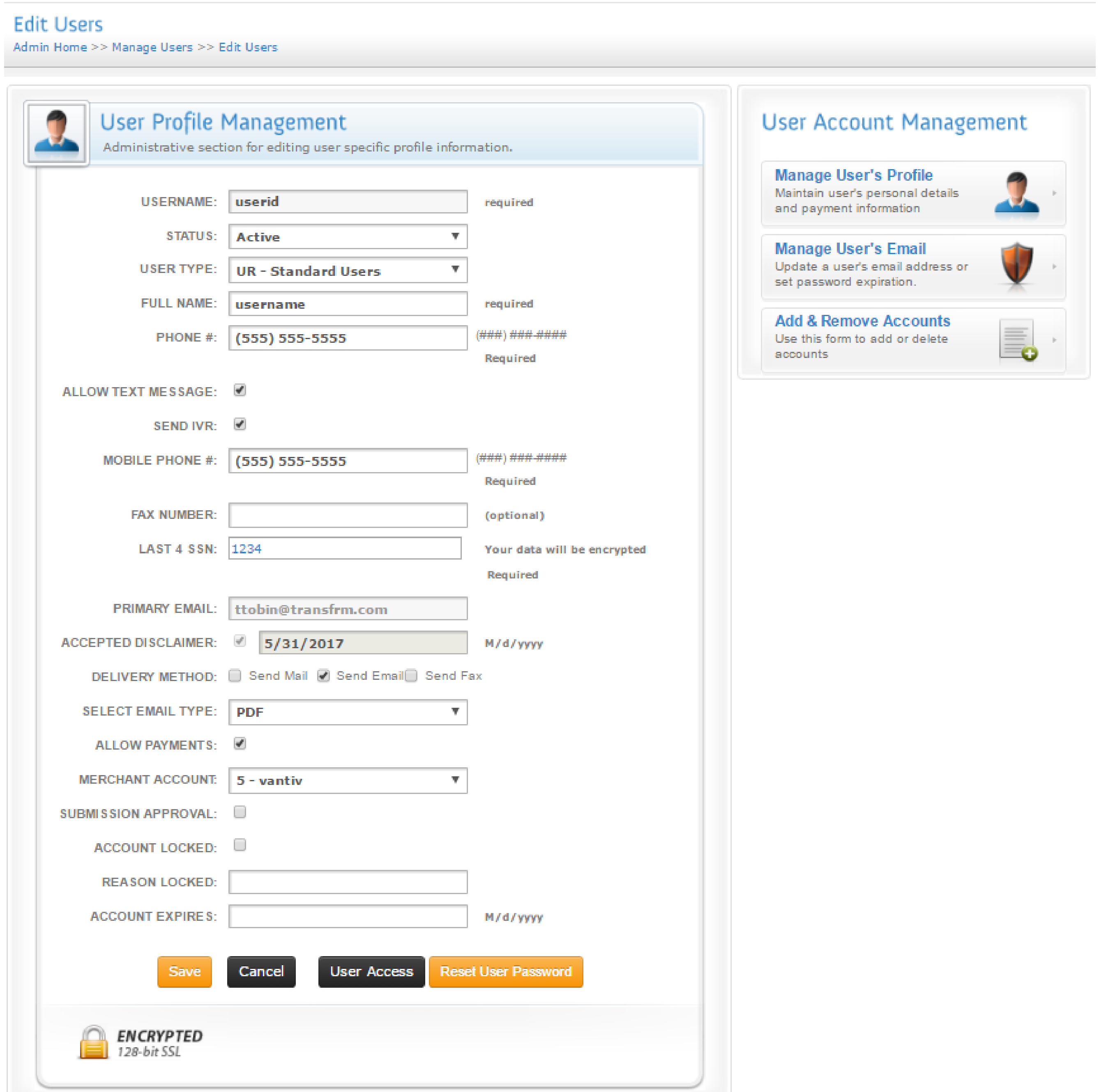


Account	Username	Full Name	Email Address	Phone	Type	Status	Email	Print
	testtest	Test	ttobin@transfrm.com	5555555555	UR	New	N	Y
1010123456789	testuser	Tiffany Tobin	ttobin@transfrm.com		UR	Active	N	Y
80200	testuser	Tiffany Tobin	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	testuser2	Tiffany	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	testuser3	Tiffany	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	testuser4	Tiffany Tobin	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	testuser5	Tiffany	ttobin@transfrm.com		UR	New	N	Y
1010123456789	testuser7	Tiffany Tobin	ttobin@transfrm.com		UR	Active	Y	N
80200	timadams	Tim Adams	ttobin@transfrm.com	5555555555	UR	Active	Y	N
941236	tylerkepley	Tyler Kepley	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	user1234	Tiffany Tobin	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	userid	username	ttobin@transfrm.com	5555555555	UR	Active	Y	N
80200	userid	username	ttobin@transfrm.com	5555555555	UR	Active	Y	N
987544	userid5	Tiffany Tobin	ttobin@transfrm.com		UR	Active	N	Y
1010123456789	username6	username	ttobin@transfrm.com	5555555555	UR	Active	Y	N
	usernme5	test	ttobin@transfrm.com		UR	Active	Y	N
2345135	walterwillis	Walter Willis	ttobin@transfrm.com		UR	Active	Y	N
2345135	walterwillis2	Tiff Willis	ttobin@transfrm.com		UR	Active	N	N

This will have the user's profile items in addition to some administrative settings that only an admin can edit here.

Only accessible on this page for admin users to edit:

- Status
- User Type
- Allow Payments
- Merchant Account
- Submission Approval
- Account Locked
- Reason Locked
- Account expires
- Any items that have been hidden from the user's profile



Any custom field used for New Password Verification/Registration Verification will show up here for admin as well as on the user's profile. (ex: Last 4 SSN)

Username – Used to login to the site. This cannot be edited.

Status – The user can only log in if the status is Active. You can change it to Inactive if you no longer want this user to be able to login.

User Type – Based on the type chosen, the user will have the security settings that are associated with that user type.

Full Name – The name of the user. This is displayed in the top right corner when a user logs into the site.

Phone # – This will be used for IVR messages.

Allow Text Message – This enables the user to receive SMS messages.

Send IVR – This enables the user to receive IVR messages.

Mobile # – This will be used for SMS messages.

Fax Number – The fax number for this user if receiving faxes.

Primary Email –This cannot be edited here. It must be edited under Manage User's Email.

Accepted Disclaimer – Shows if and on what date the disclaimer was accepted by the user. This cannot be edited.

Delivery Method – This is how the user prefers to receive statements. If email is checked, URL or PDF will need to be selected as the email type.

Allow Payments – If checked, this user has the ability to make payments on the site.

Merchant Account – If the user makes payments, this is the payment processor that will be used to process the payment.

Submission Approval – If checked, the user will be able to approve submissions if the user also has access to Web Proofing as an admin type user.

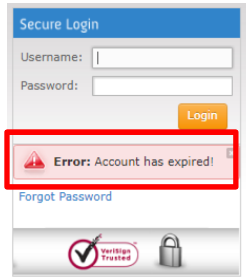
Account Locked – If this is checked, a date field will appear with the date the account was locked because of too many login attempts.

Reason Locked – This will display why the account was locked.

Account Expires – If blank, the account never expires. Select a date for the account to expire, or edit the date as necessary.

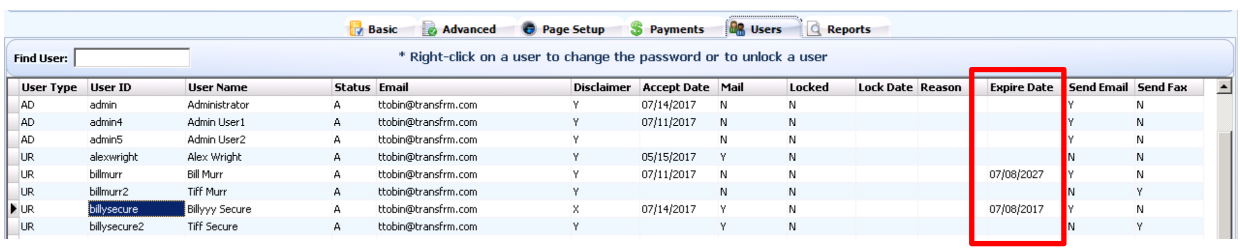
Account Expired

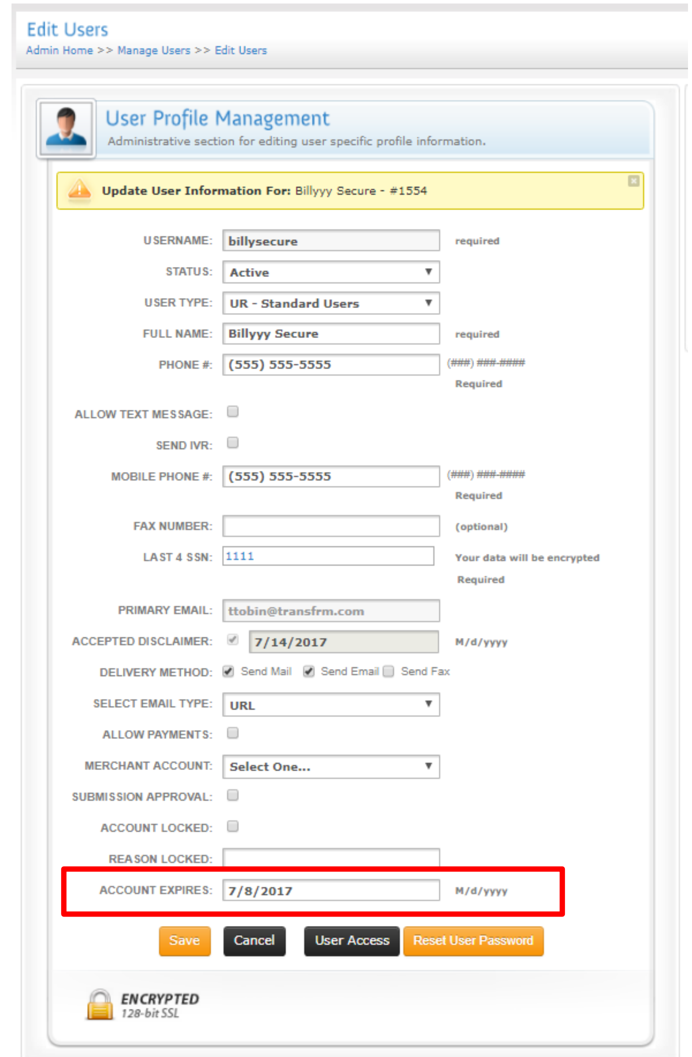
If a user's account has expired, the next time the user attempts to login, this error will come up and the user will not be able to login.



The expiration date of the account is visible to admin users on the web under Manage Users. Select a user and under the profile management the account expires date is displayed. It can be edited here. This is the ONLY way to edit the expiration date of a user's account.

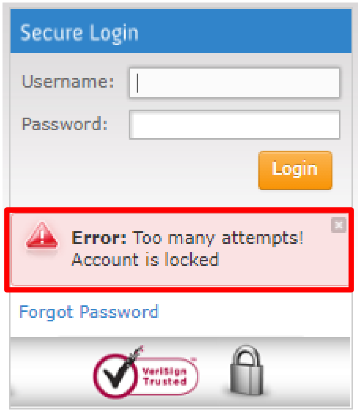
The expiration date can also be viewed under the users tab in web setup. It cannot be edited here.





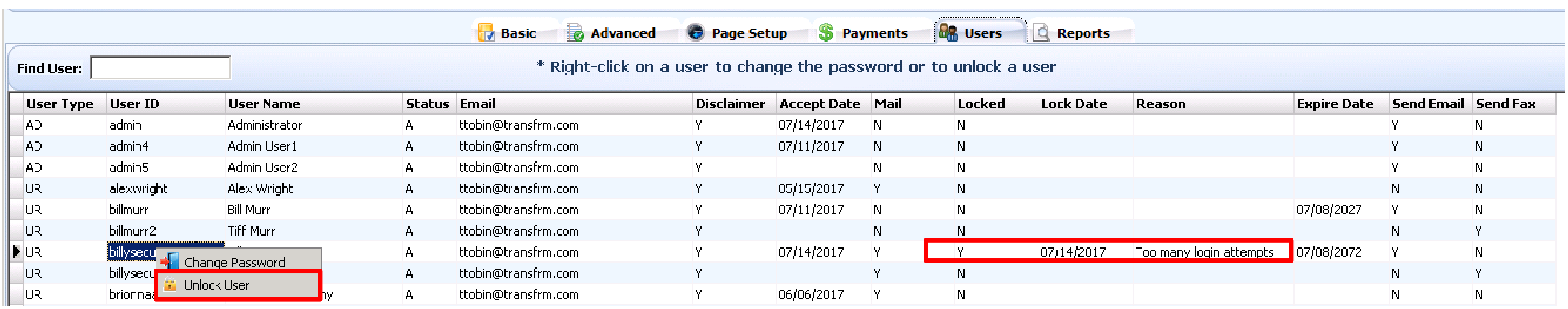
Account Locked

Accounts will be locked after too many login attempts. After 5 incorrect logins, on the 6th attempt the user will receive this error:



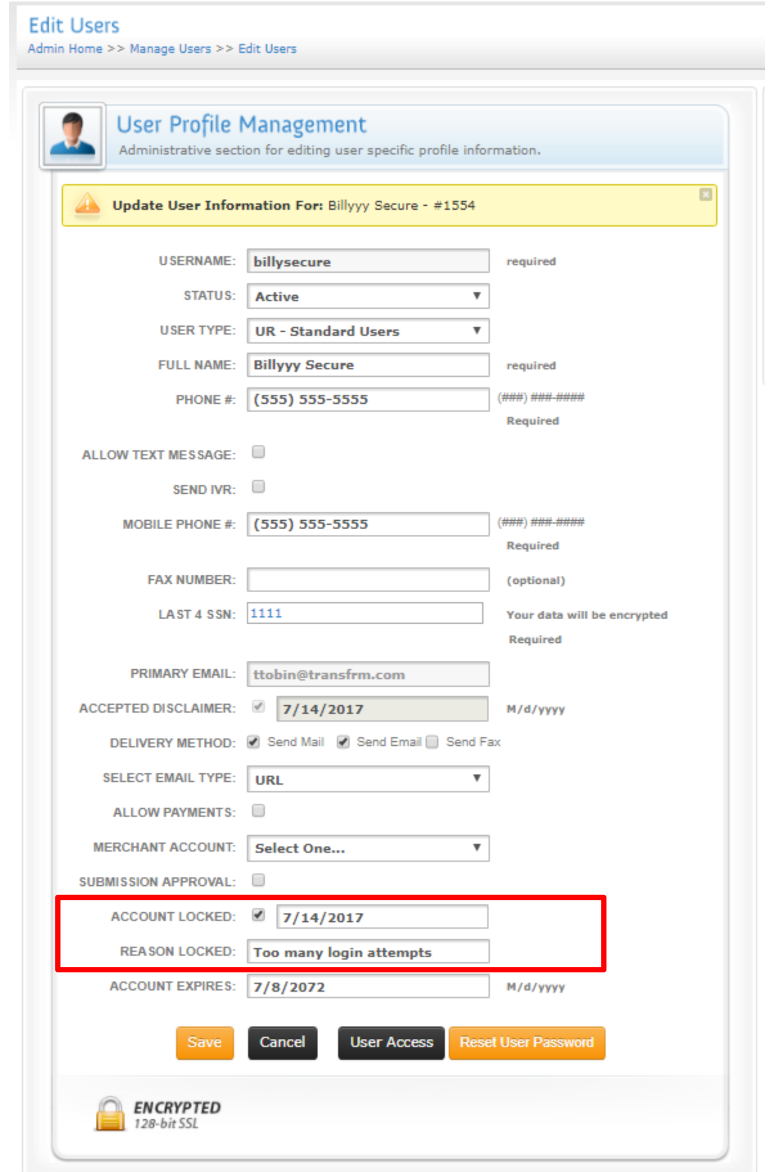
This can be verified by an admin one of two ways.

In the web setup, under the users tab, their will be a ‘Y’ in the locked column, a locked date filled in, and a reason if a user’s account is locked. To unlock the user, simply right click on the user and select Unlock User. The lock date and reason will immediately disappear and the ‘Y’ will change to an ‘N’ in the Locked column. The user’s account will no longer be locked.



An admin user can select the user from the list in Manage Users. Under the profile maintenance for that user, an admin user can see if the account is locked, the date it was locked, and the reason why it is locked.

To unlock the user here, simply uncheck account locked and click the save button. The date and reason will now be blank and the user's account will no longer be locked.



Once the account has been unlocked, the user will be able to login using their previous password or can reset it.

Tips from Transformations:

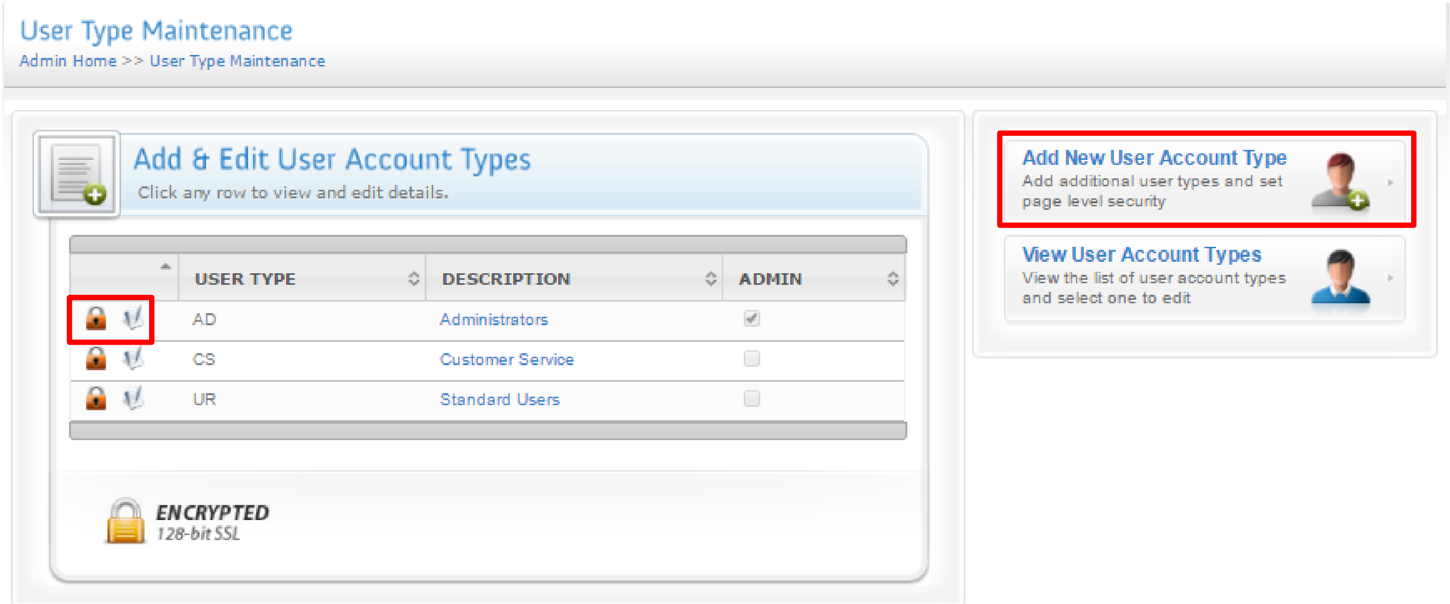
Once a user's account is locked, the user cannot reset their password using the Forgot Password link.

User Types & Security

From the Admin Home Page, select User Types & Security. This is where an admin user can create additional user types and adjust the security settings each user type is given.

By default there are three user types:

The lock takes you to the list of security settings. The document allows you to edit the user type.



See the 2017_UserTypeSecuritySettings.pdf for details about each security setting.

Create a New User Type

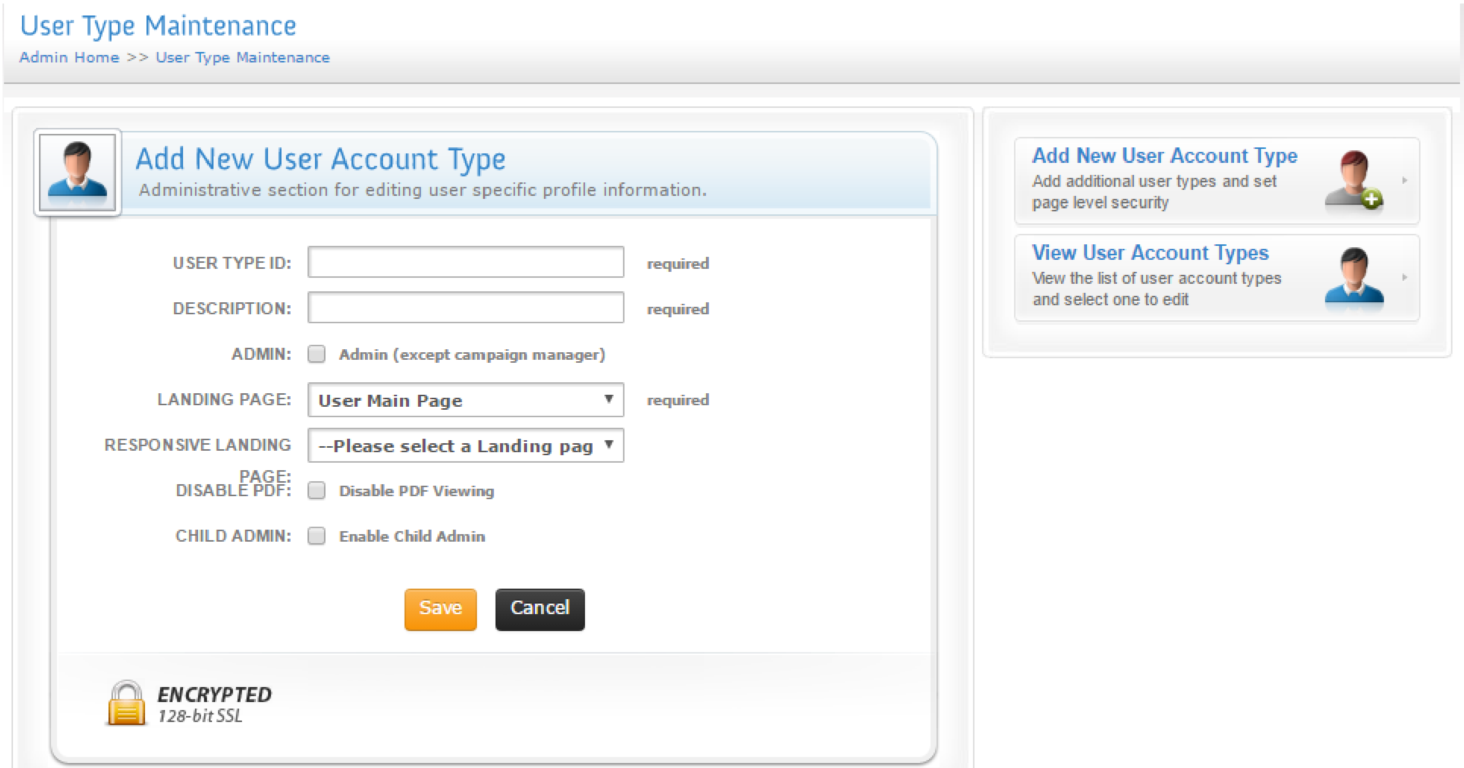
Select Add New User Account Type.

Tips from Transformations:

We recommend creating additional user types and editing the security on your custom user types. This way you can revert back to the defaults if necessary. If you customize a user too much it is no longer a true standard user for example.

User types cannot be deleted; they can only be edited.

View User Account Types will bring you back to the previous screen.



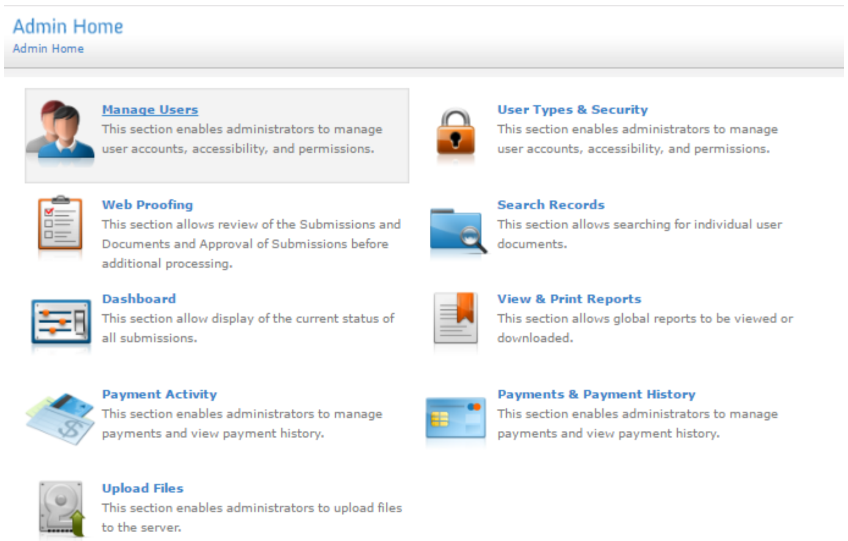
User Type ID – This is the 2-digit code used to represent the user type. This will be displayed as a column for the list of users under Manage Users or the Users tab in web setup to help identify the user type and associated security and settings that user is assigned.

Description – This will help explain what the User Type ID means. Enter something that further explains the user type being created and what users should be assigned this user type.

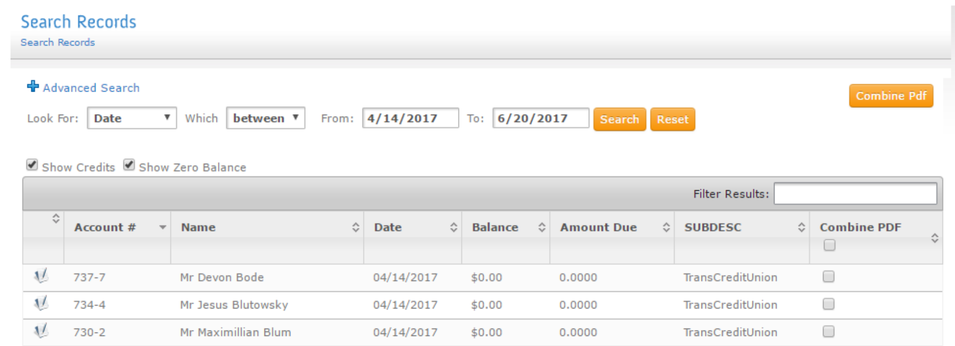
Admin – If this is checked, the user type will have access to the admin main page or CSR search page as a landing page. This will check all of the security settings for that user type. You can go in and edit the security settings once the user is created to pair them down if desired.

Landing Page – This is the page seen by the user upon logging into the site. For end users the options are User Main or Submission Management (for use only with the banking workflow). If the admin box is checked, the CSR Search page and admin main page will be additional options. Choose the appropriate landing page for the user type you desire to create.

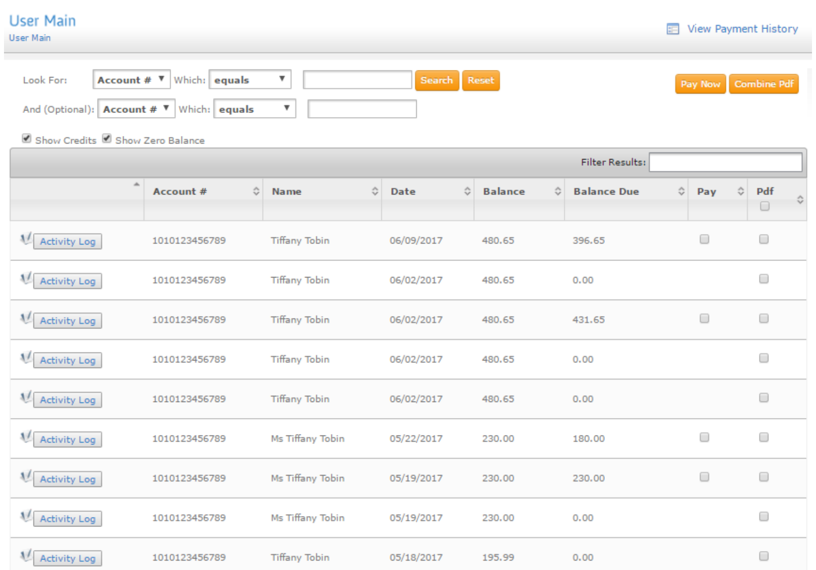
Admin Main Page



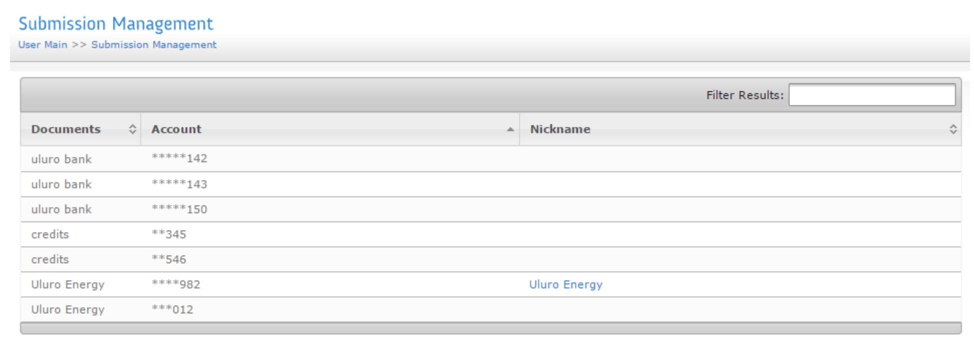
CSR Search Page



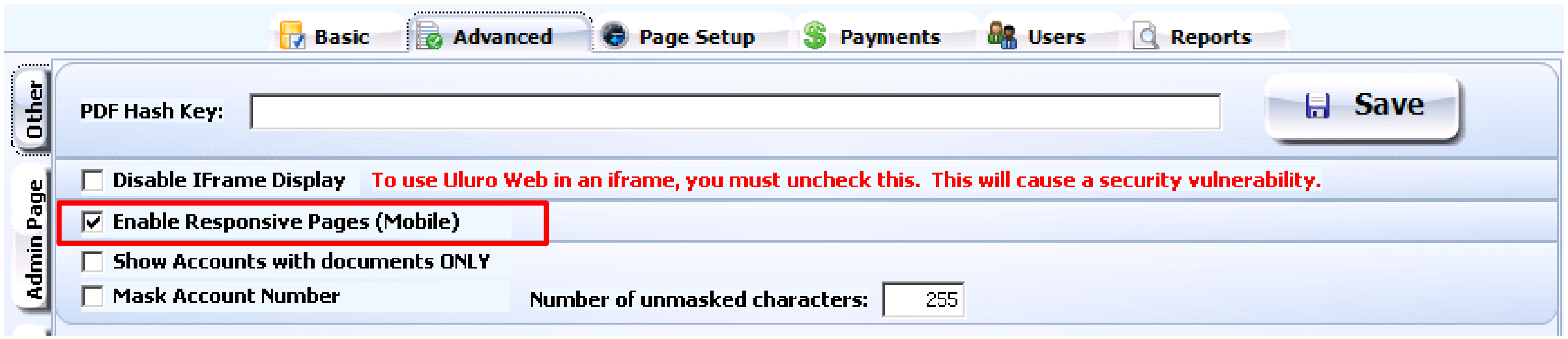
User Main Page



Submission Management

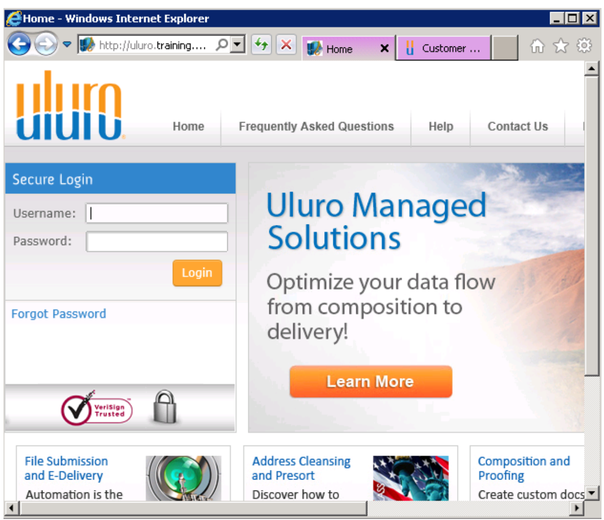


Responsive Landing – This will only be an option if responsive pages are enabled under the advanced tab. Responsive documents is the only Uluro page that has been designed as a responsive landing page. It can only be selected for non-admin users.

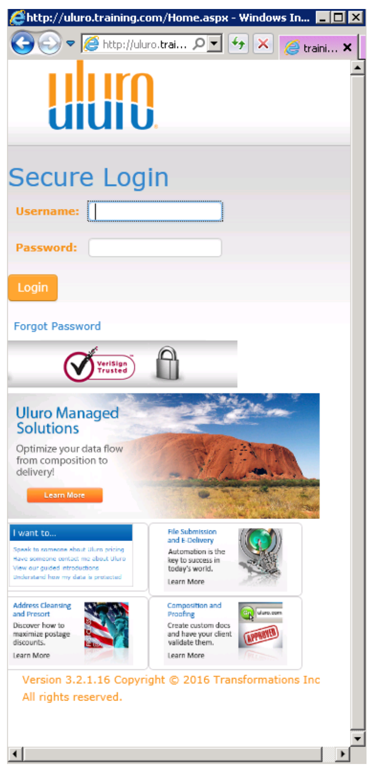


If responsive pages are enabled, the home page, user main, Confirm page, and payment pages will be responsive.

Responsive Pages unchecked



Responsive Pages checked



Tips from Transformations:

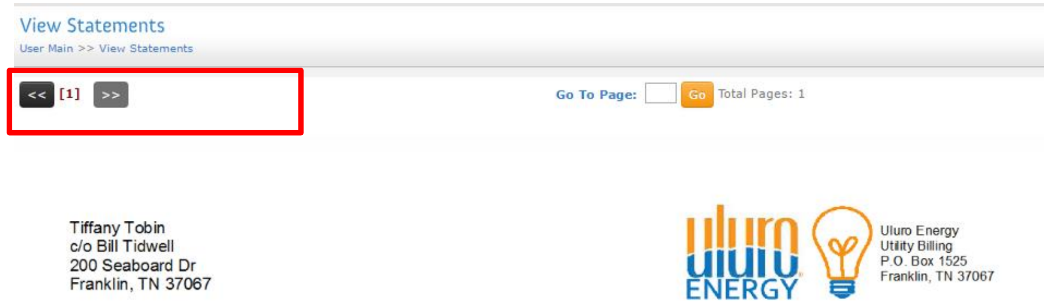
The following must be checked for the user type under Security settings to access responsive pages:

- Responsive Documents
- Responsive Payments
- Responsive Receipt

The following pages will be viewed by that user type as responsive pages:

- Login Page
- User Main Page
- Payment Pages
- Registration Page

Page Disable PDF – If this is checked the user can only view documents as a PNG image. The PDF button will not be displayed for a user to view the document as a PDF.



Child Admin – This will only be displayed if the site has been set up as the parent for parent/child. If this is enabled, the user will be able to access the child site when logged into the parent site.

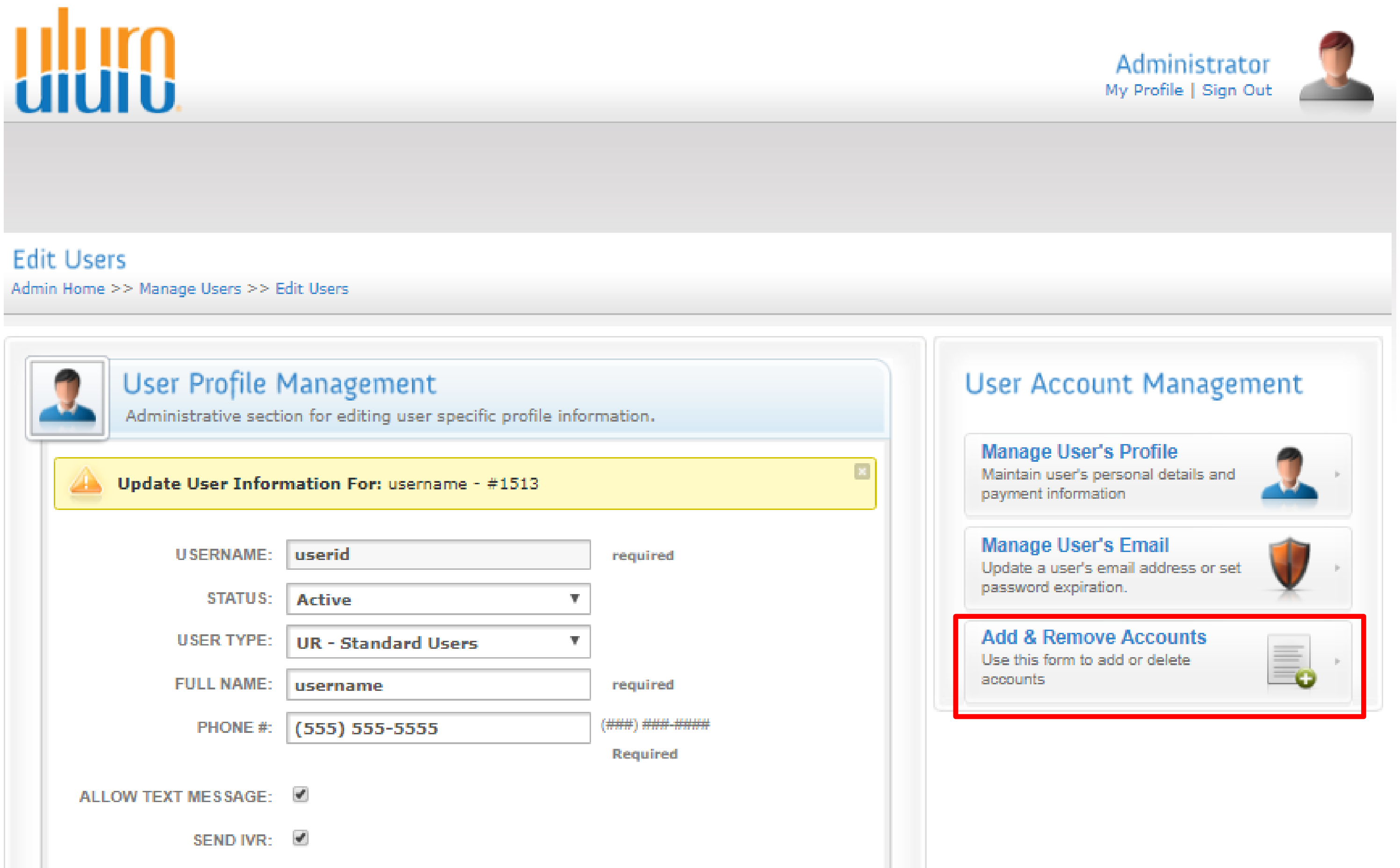
Add an Account to a User

The User Main screen allows the end user to view only those documents containing an account number assigned to that web user.

You can have multiple account numbers assigned to one end user account but the assigning must be done by an admin; end users cannot add account numbers to their account.

To add an account number to a user that has been previously created, an admin user must be the one to add the account number.

The admin user will select the user under Manage Users from the list of all users for that site. Then select the Add & Remove Accounts button.



Click the Add New Account button. Any account numbers that have been added will be displayed in the box.

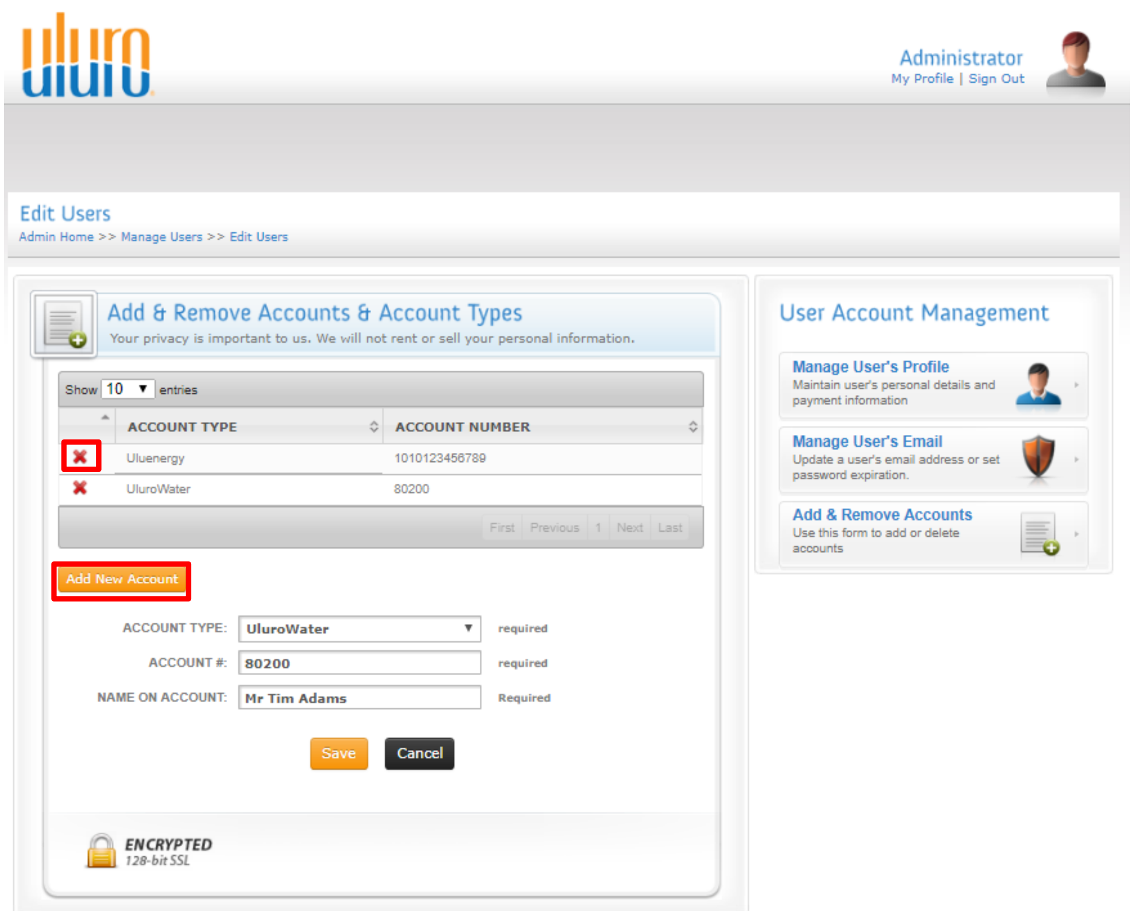
Account Type – Select a submission type. All sumbission types for this client will appear in this dropdown list.

Account # – This must be the account # as it appears on the statement.

Name on Account – This must be the name *exactly* as it appears on the statement. This field is case sensitive.

The admin user can add as many account numbers for a single submission as desired. Multiple accounts across multiple submissions are also possible.

To remove an account click the red X.



"Add User Accounts" Page Options (Web 3)

By default the account number and name on the account will be validated.

If you wish to change the default way of validating when adding acocunts to users, that can be done within eah submission type under the web tab.

Validate Account # – If this is unchecked any account number can be added; it does not have to exist. If it is checked, then the account # must be in the system for that Submission type.

Name on Account Field – This can be hidden, optional, or required. It is required by default.

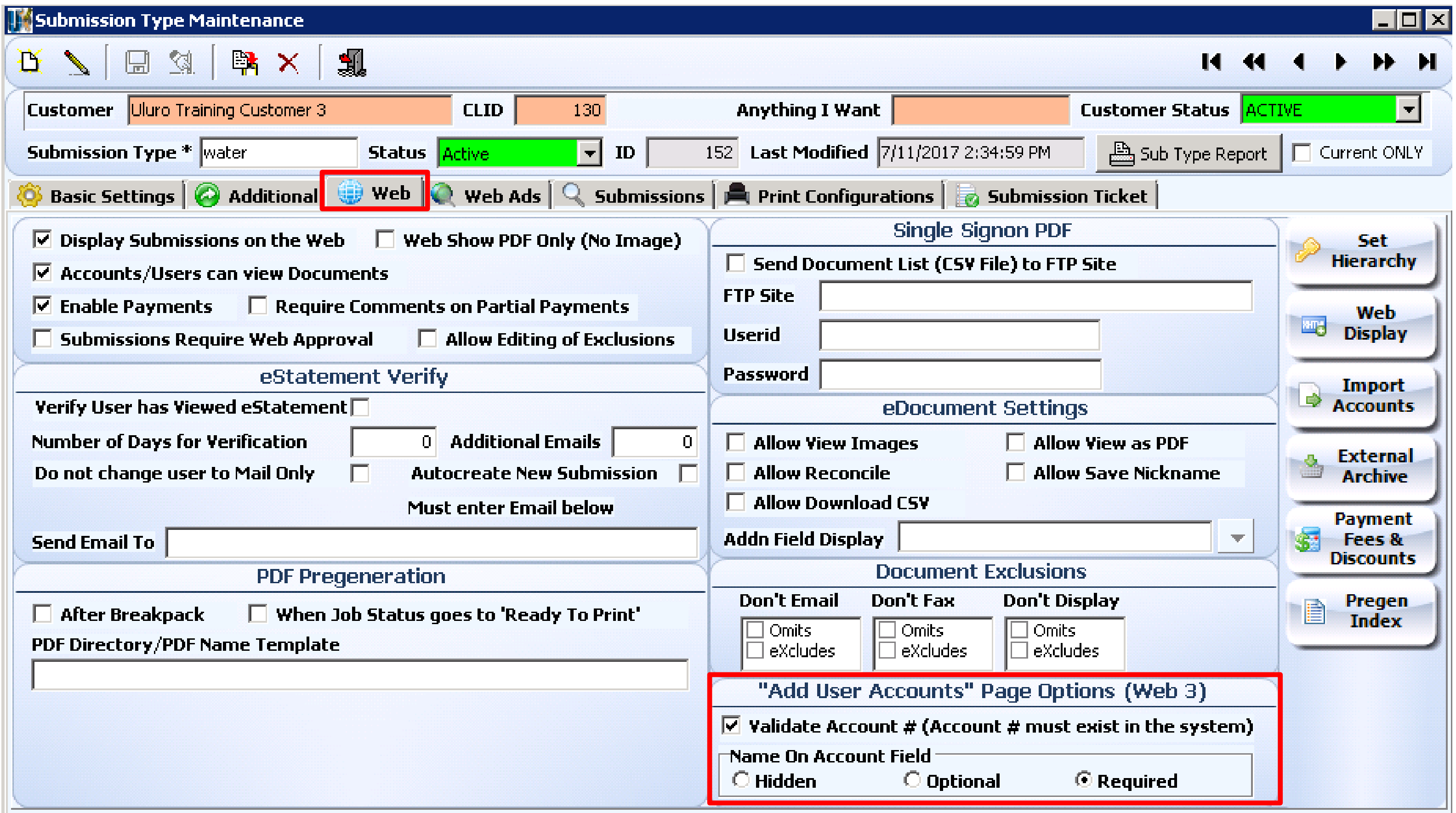
Hidden – It will not appear as a field when an admin user is adding accounts for a user.

Optional – The field can be blank or not match the name on the statement.

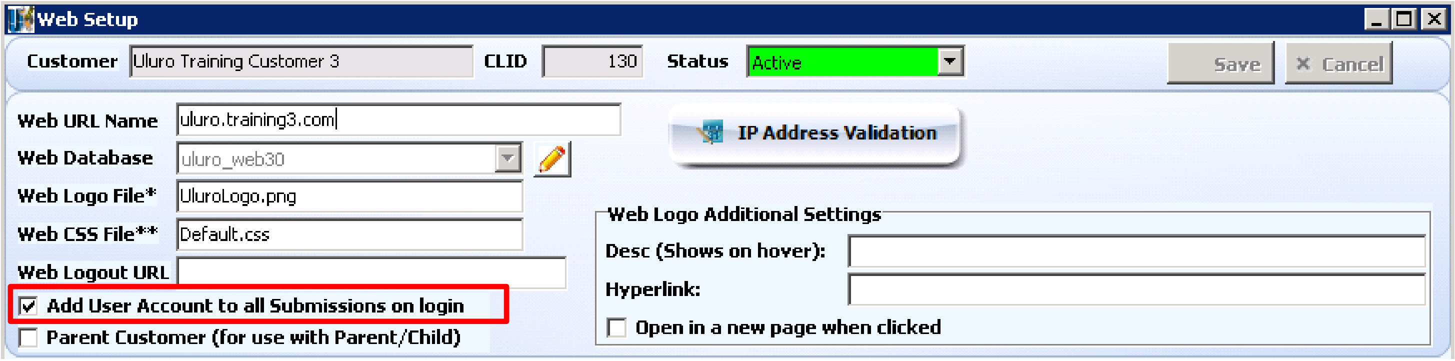
Required – The name entered must match the name as it appears on the statement.

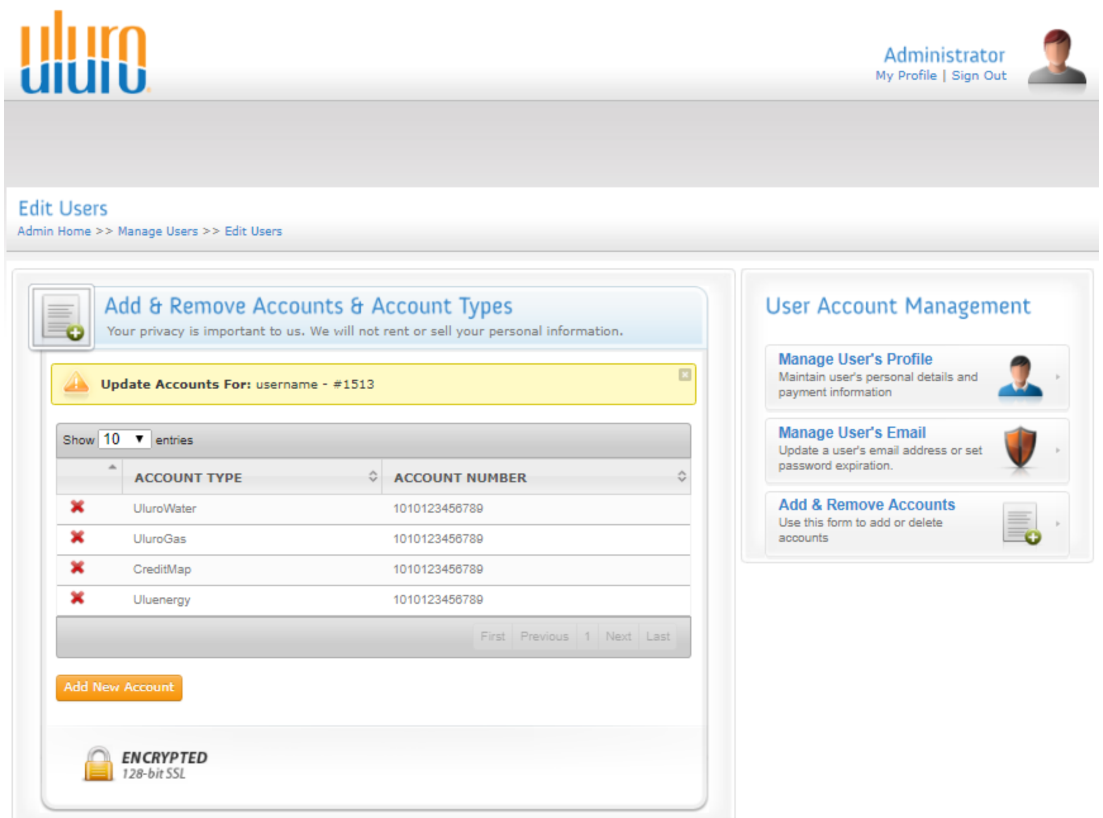
Tips from Transformations:

If you arent performing validation you won't catch typos, errors, etc. Users may have account numbers added to them but not be able to see documents if the account number is not being validated. If both the name and account number are not being validated you run the risk of users being able to see documents of other users.



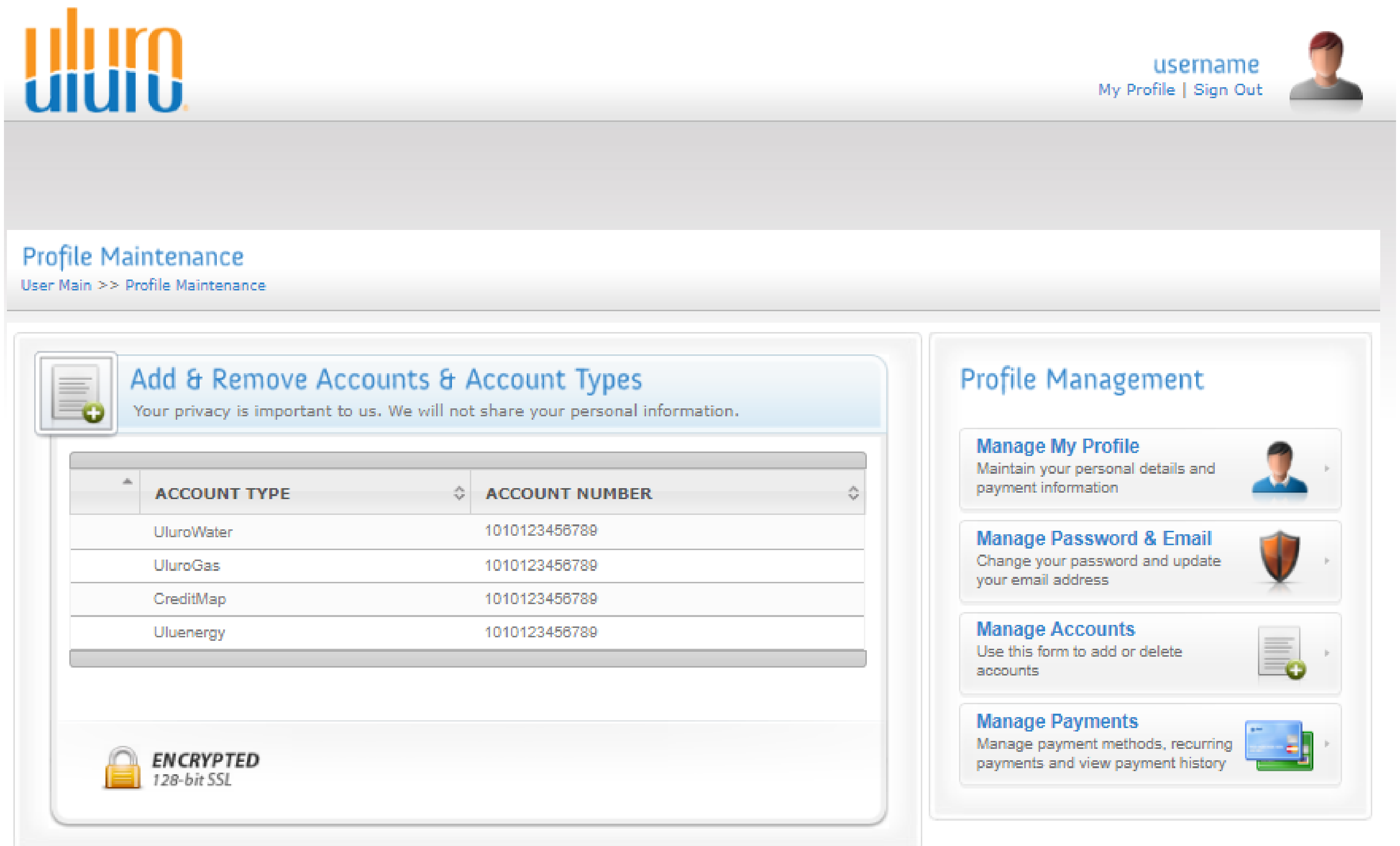
Add User Account to all Submission on login – When an account number is linked to a user, if this is checked, the user will be linked to that same account number for each submission type under this client. Once this is checked, this setting takes effect for all users on the site, even if set up prior to checking this setting.





A standard user can view the accounts that their username has access to view. The user can login, select their profile, and click Manage Accounts. This will display all of the statements they can view.

The user does not have the ability to edit this list.

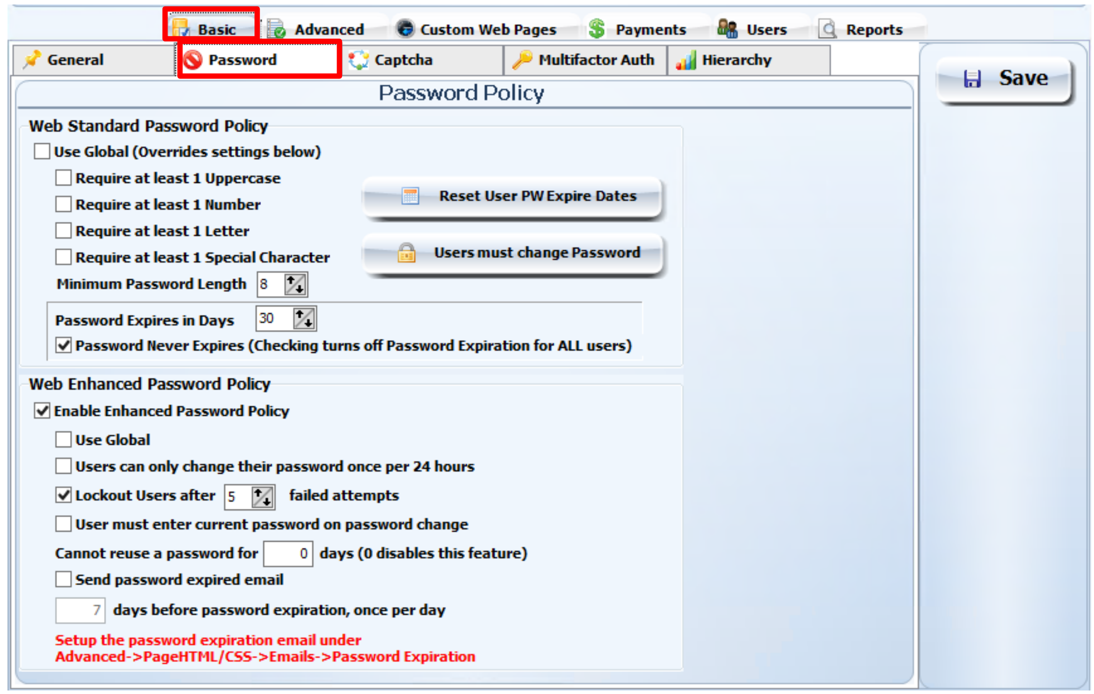


Registration

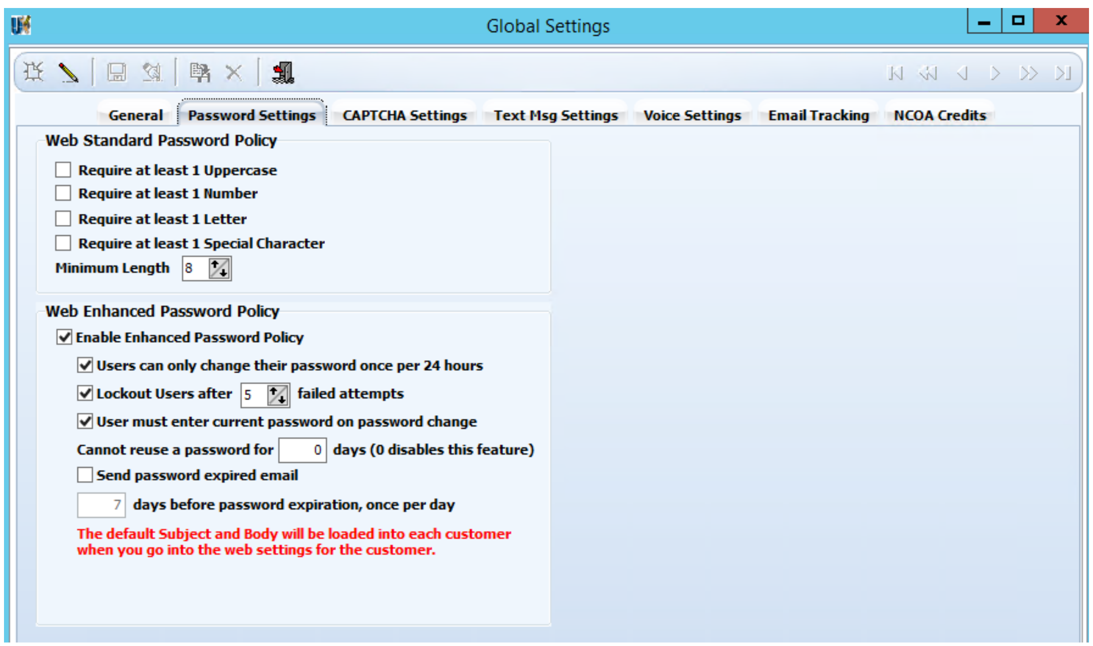
Password Settings

Within the web setup, you can require the password to contain uppercase, numbers, letters, special characters, and have a minimum length. The minimum length must be at least 8 characters.

When a user is being created, by an admin user or self-registration, the user will only be created once a password that satisfies the criteria here.

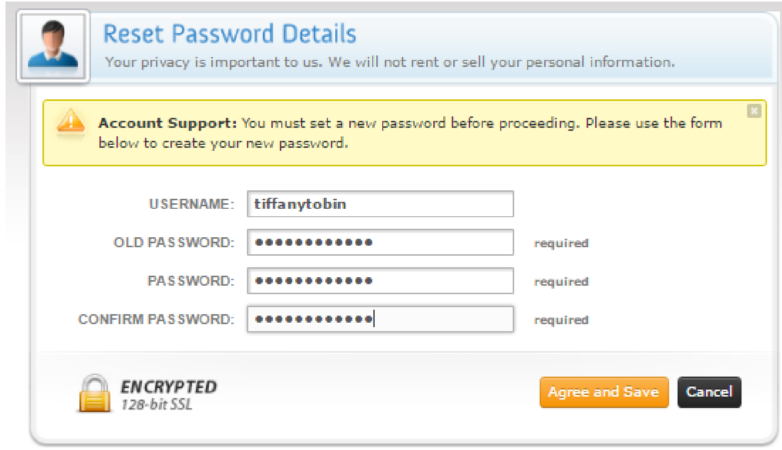


Use Global – If this is checked, the global settings will override the settings in the web setup. To edit the global password settings, go to the Main screen of uSetup. Under the configure menu, select global settings. Go to the Password Settings tab.



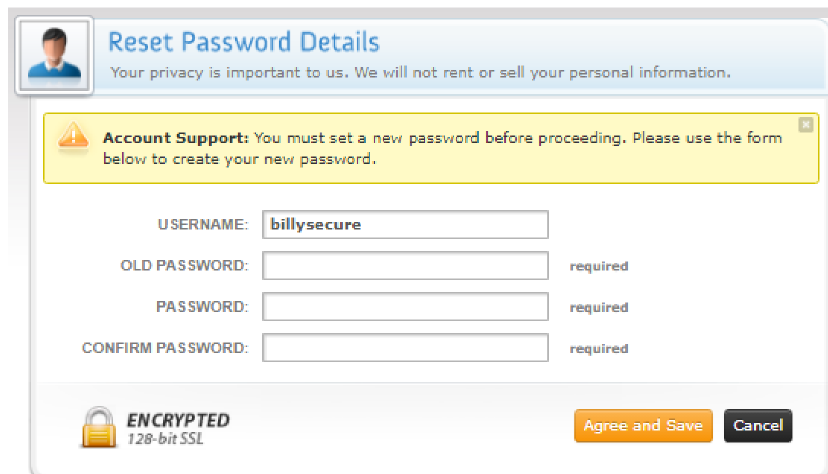
Users must change Password - Changes made on this screen will only effect future users. If you want the password setting changes to effect current users click this button. This will force users to change their password the next time the user logs into the site.

On the next login, the user will be redirected to this screen:



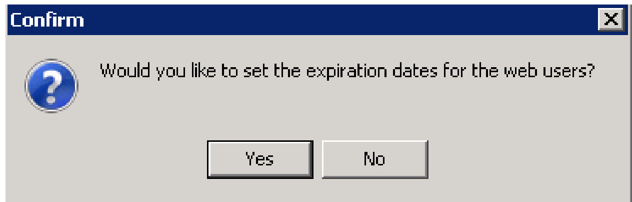
Password Expires in Days – Enter the number of days for the password before it expires. Once it is expired, the user will be prompted to change it at the next login attempt.

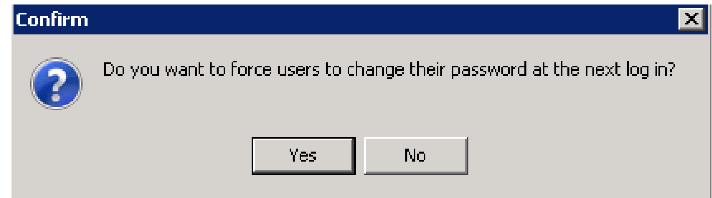
If the password has expired, the next time the user logs in, the user will be directed to reset their password:



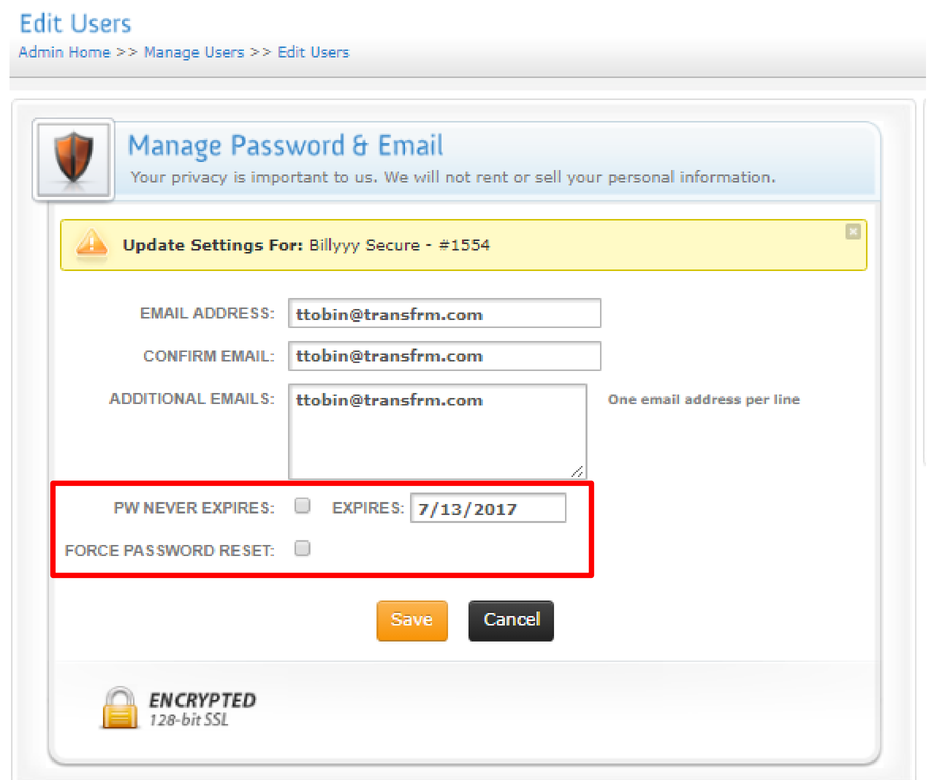
Password Never Expires – If this is checked, it will globally override the password expiration date of all web users. If a user's password expired yesterday and they login today, the user will not be prompted to chang their password.

If never expire was checked and is then unchecked, before you save you will be asked 2 questions:





Reset User PW Expire Dates – Click this to reset the expiration dates for all web users based on the criteria above regarding the number of days/checkbox to never expire.



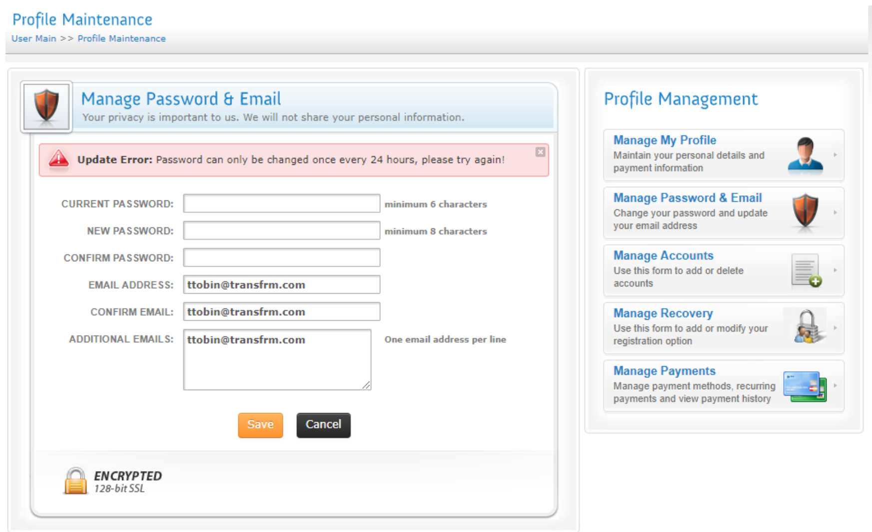
Admin can verify a password expiration date or manually adjust the password settings for individual users. The admin user can go to Manage Users and select a user. Under Manage Password & Email settings the admin can:

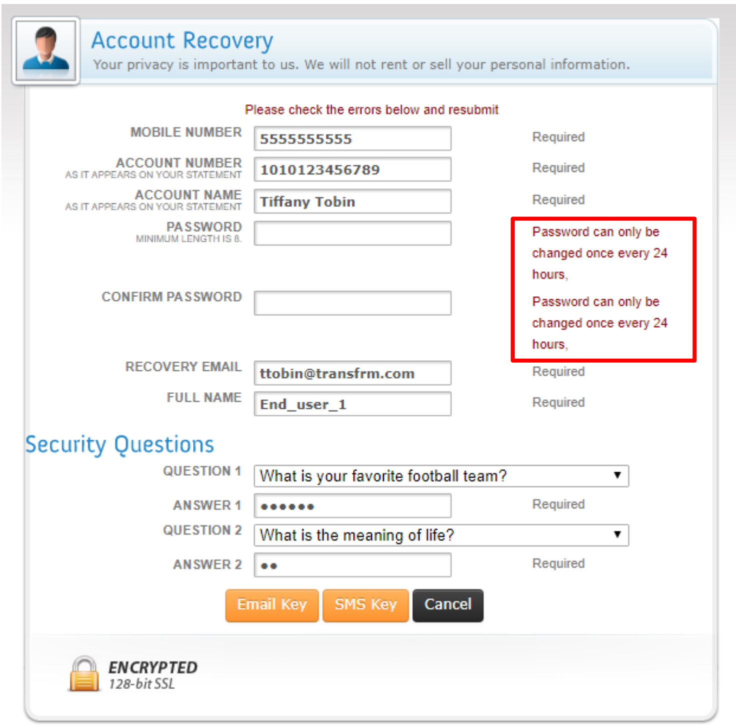
- Check PW Never Expires – the password of this user will never expire
- If the password has an expiration data that has been set it will be listed and can be changed for this user
- Force Password Reset – If this is checked, the next time this user logs into the site, the user will be prompted to reset their password. (This does not trigger the reset password email.)

Enable Enhanced Password Policy – Checking this will turn on the feature. If this is not checked, the feature is disabled and the standard Password policy settings will take effect.

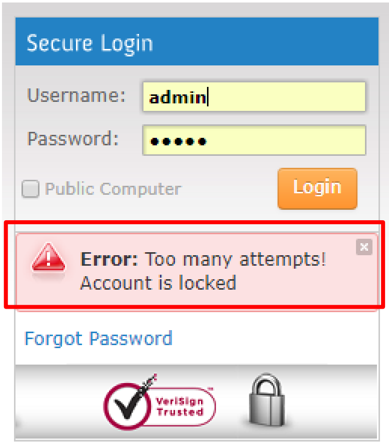
Users can only change their password once per 24 hours – Enabling this feature prevents users from changing their password more than once in a 24-hour period.

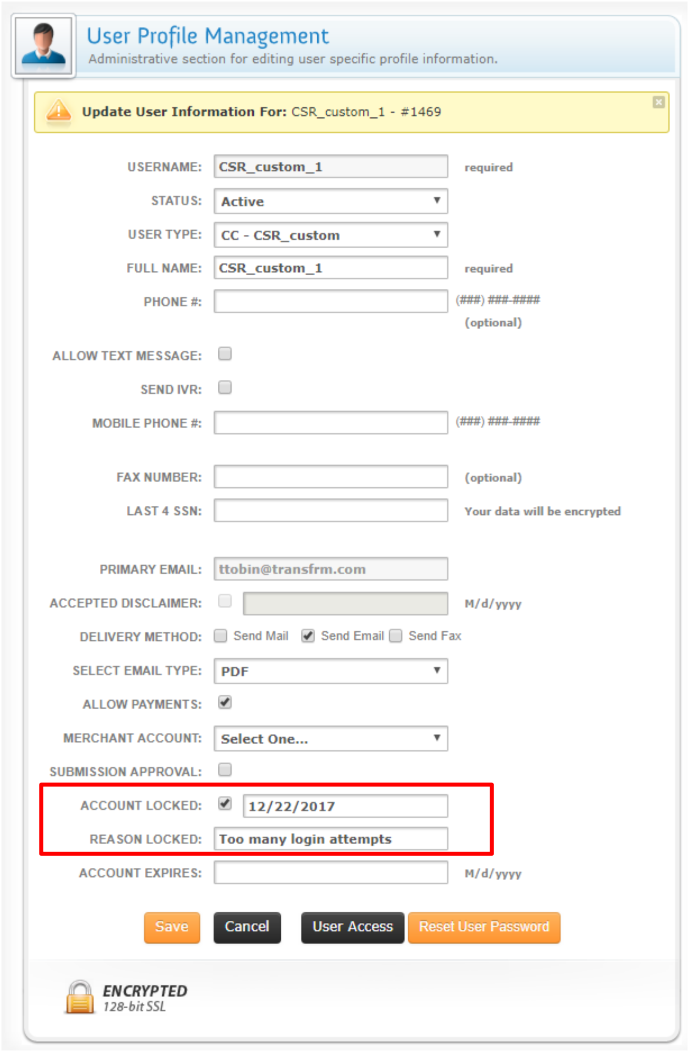
If a user tries to click Forgot PW on the home page and they have already changed their password once in the last 24 hours, they will not be able to change it and receive an error message.



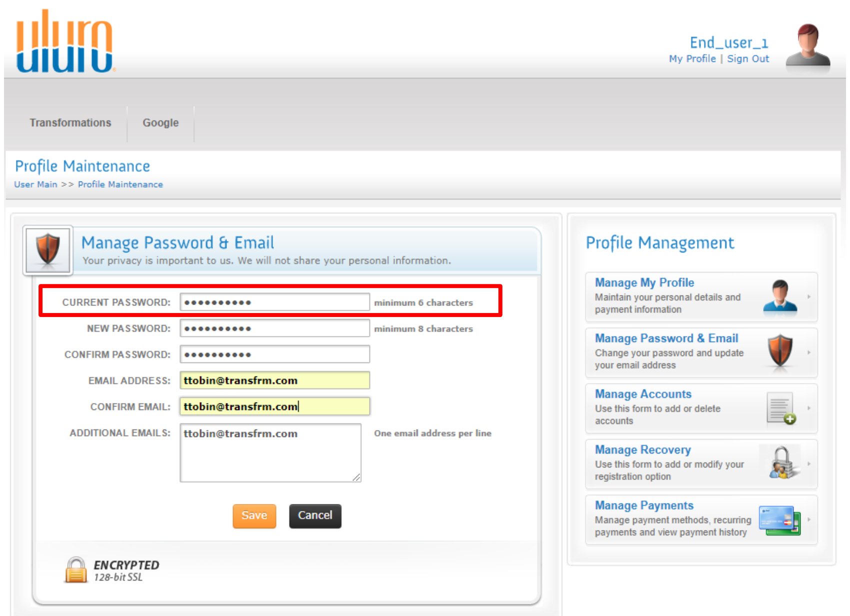


Lockout Users after n failed attempts – Enabling this feature will lock out users that fail to enter their password correctly n consecutive times. Set the value to the number of consecutive failures. This is different from before since it was hard coded at 5 and now it can be any number.



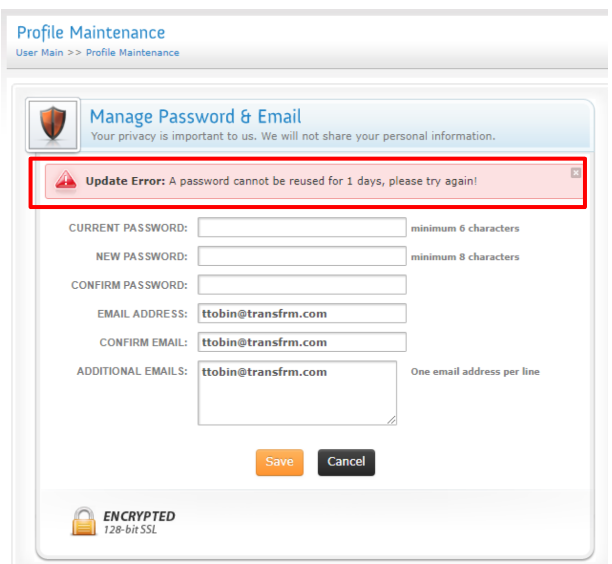


Users must enter current password on password change – Enabling this feature will add a field to the Change Password form for the current password. User will be required to enter their current password correctly as well as their new password.

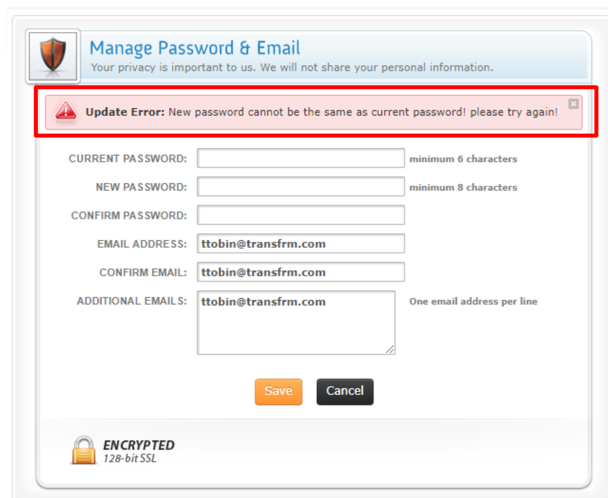


Cannot reuse a password for n days – Set the number of days to keep the password history. If this is greater than zero, a user cannot reuse a password until the number of days has passed.

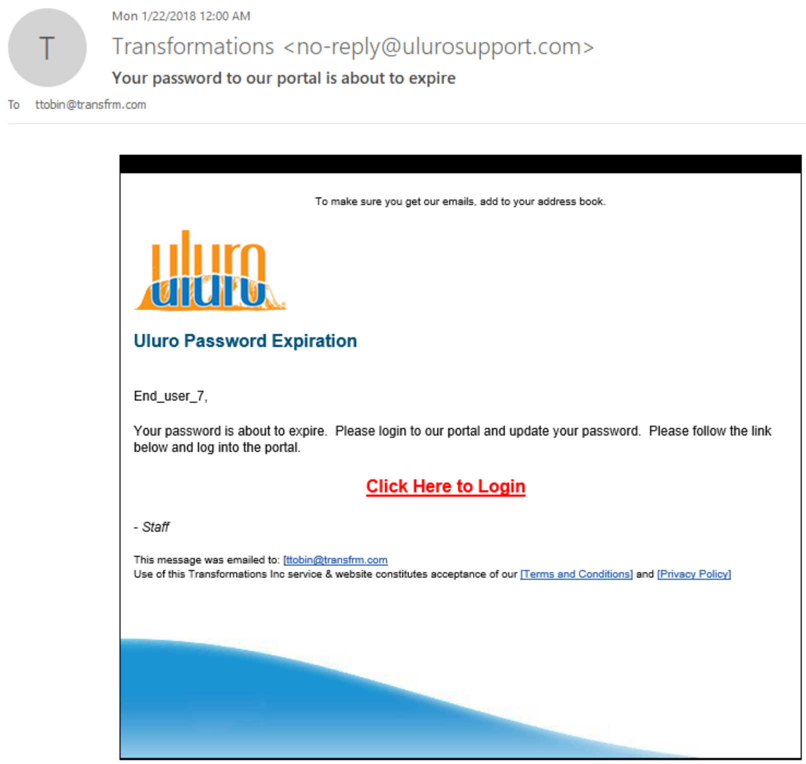
If a user tries to reuse a PW, they will receive an error message.

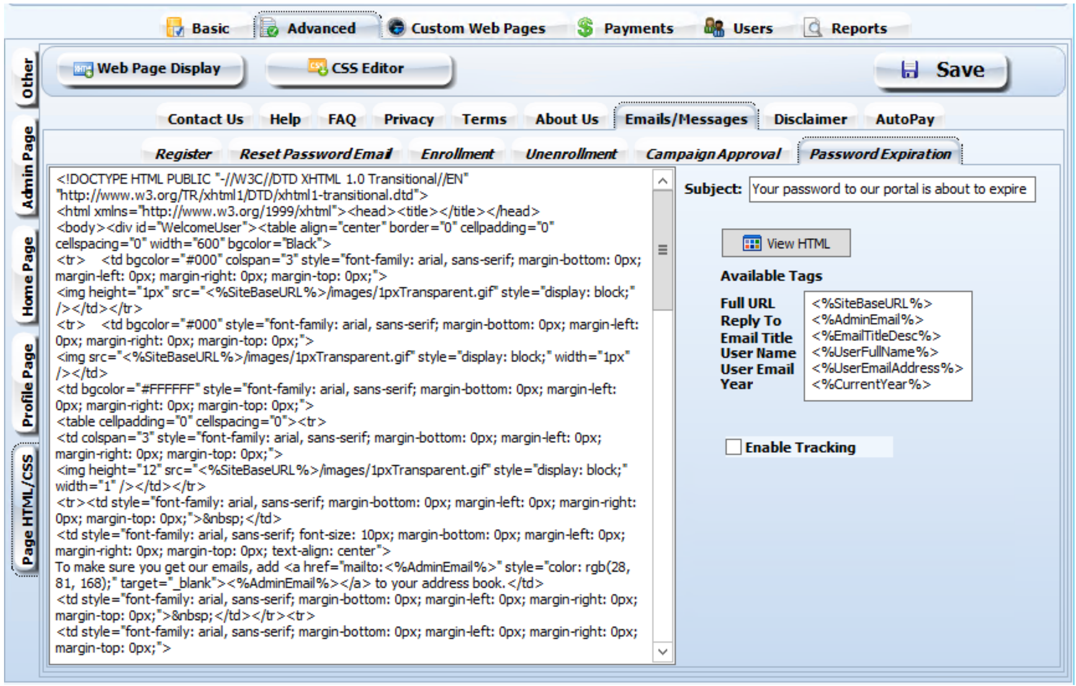


Users cannot change their password to their current password. The user must select different password. If the user tries, this error will occur:



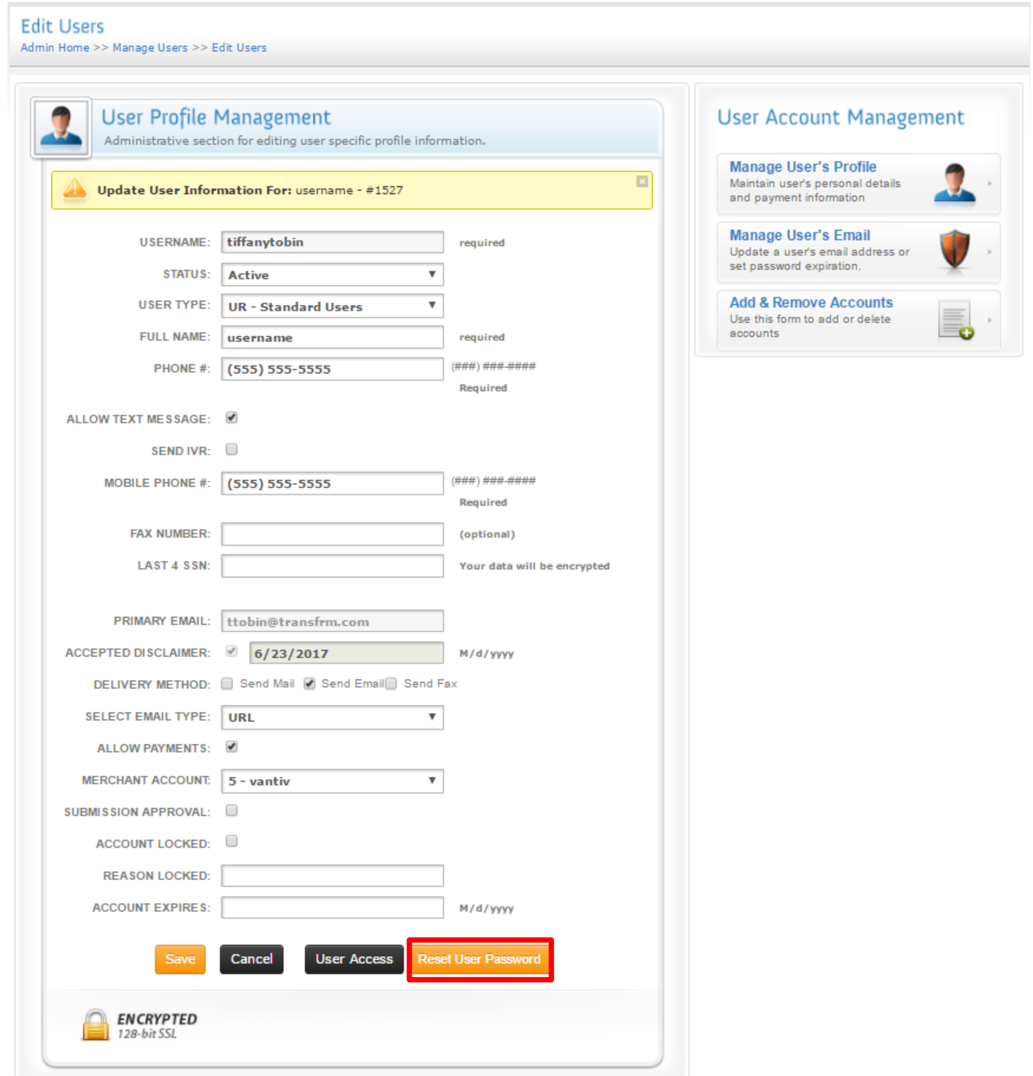
Send password expired email – Enabling this feature will send password expiration emails starting n number of days before expiration and will continue to send an email each day until the password is updated or the password expires.

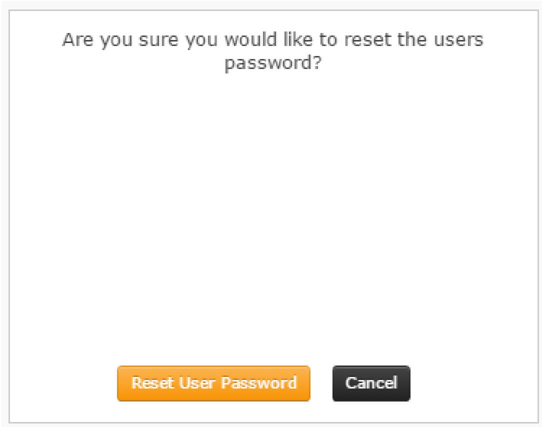




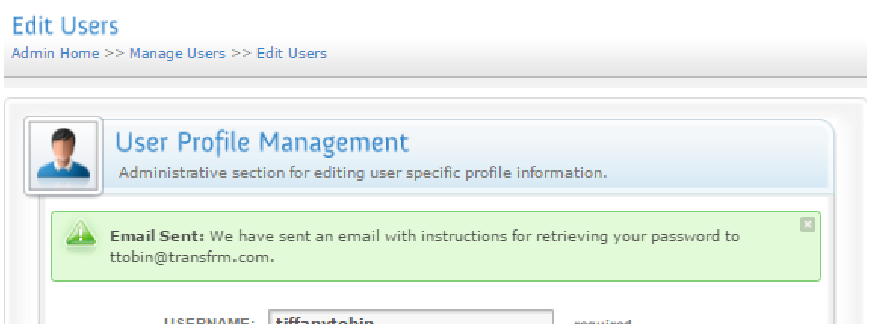
Reset User Password

Under Manage users, select the user that needs a password reset. Click Reset User Password at the bottom.

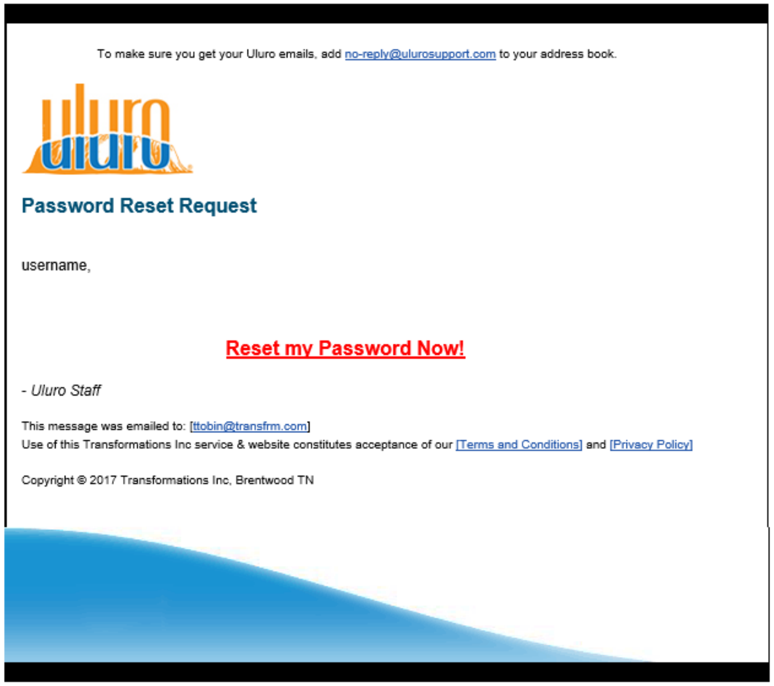


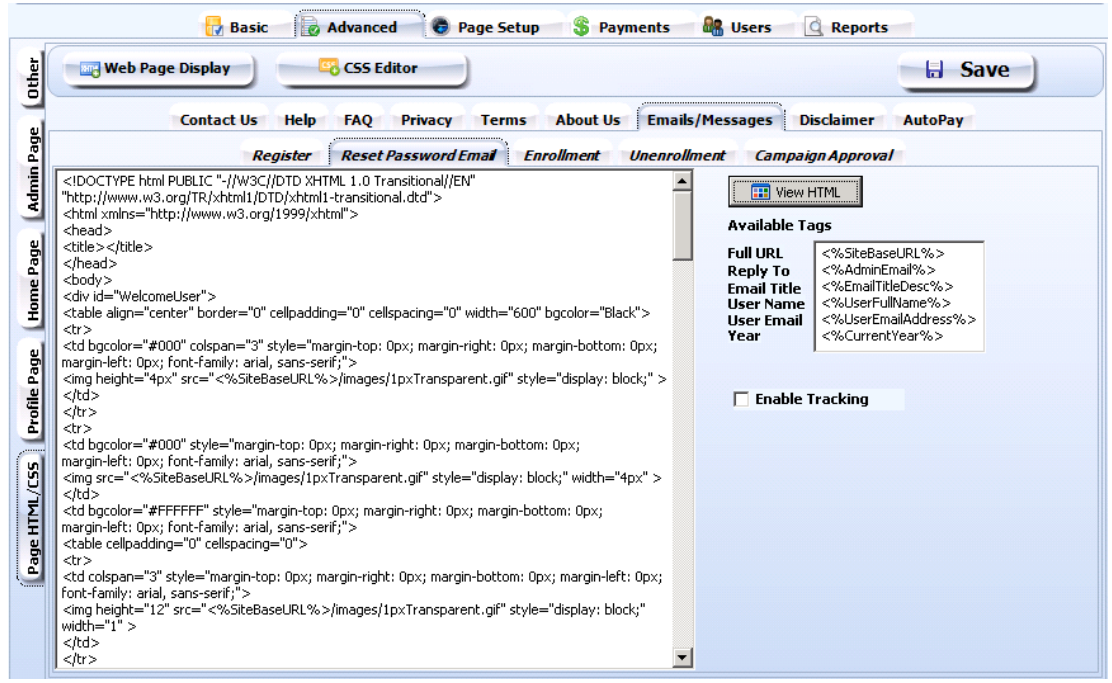


Click Reset User Password.



An email will be sent with a link to Reset their password. This email is setup in web setup under the Advanced tab, Page HTML/CSS tab, Emails/Messages tab, Reset Password Email.



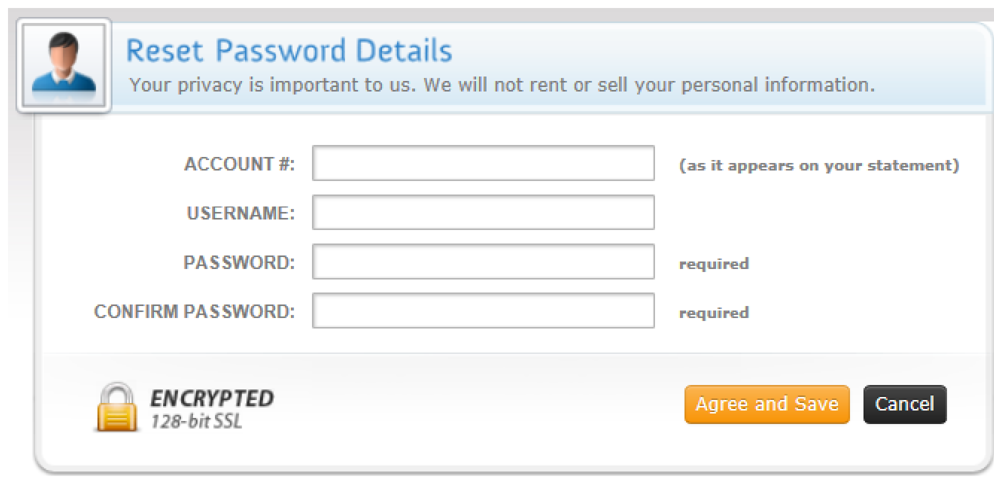


The link takes a user to this page:

If the user that you reset the password for logs into the site prior to resetting their password, they will be redirected to the same page the link in the email takes them to.

Tips from Transformations:

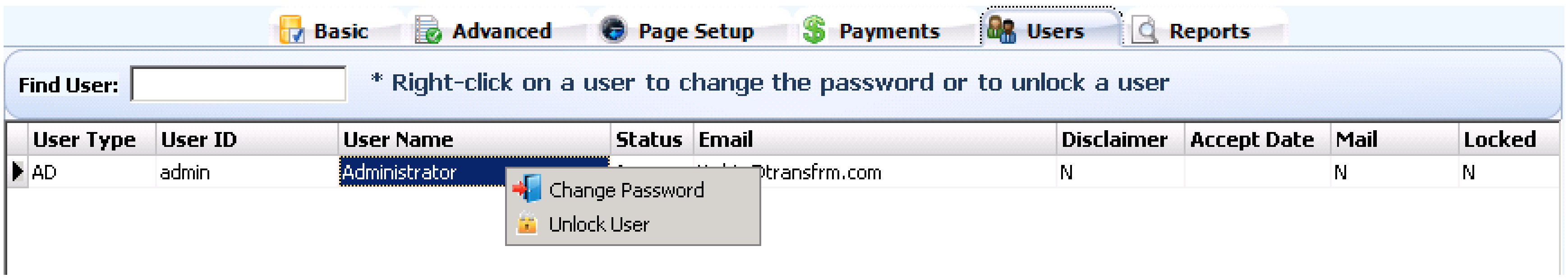
Only an admin has the capability to reset a password for any user. Users can change their passwords but not reset them.



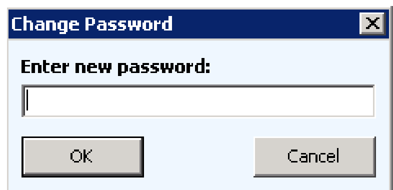
Change Password

Admin

Admin have the capability to manually change a password for any user. Within the web setup, the users tab lists all users for that site. Right click on a user and select Change Password.



You will be able to enter the new password:



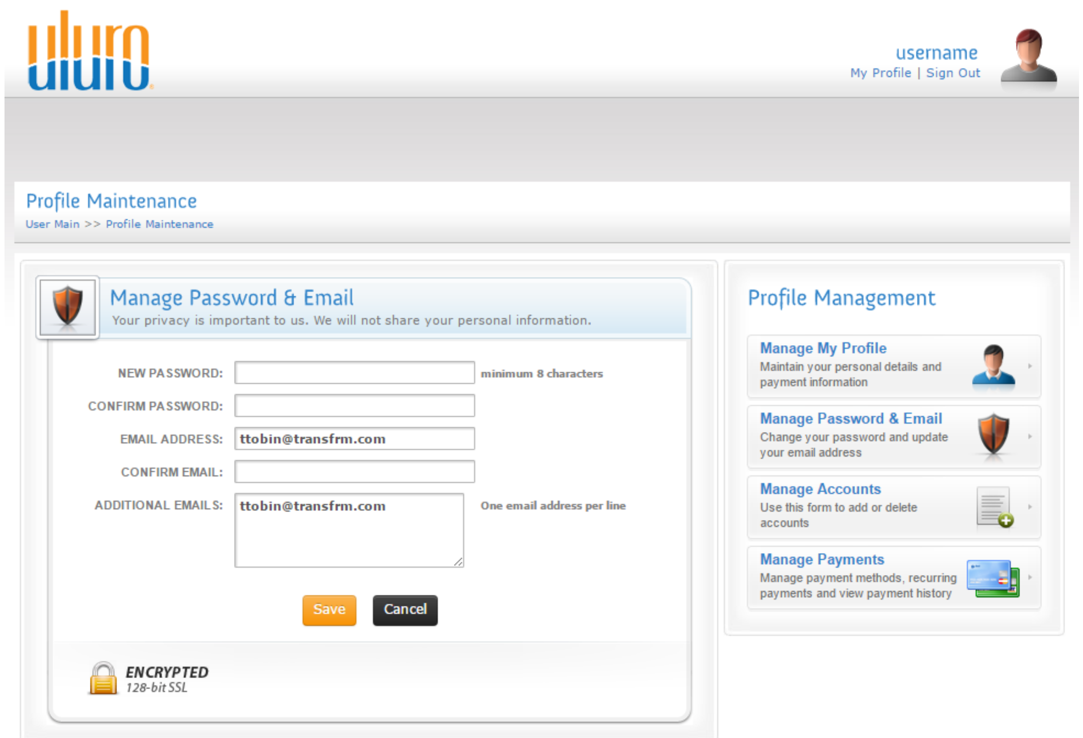
This password can be anything and does not have to meet the password settings at the client/site level or at the global level. It can be any length of characters.

All Users

Users can change their password by clicking My Profile, then Manage Password & Email.

The user will enter a new password. It must meet the password settings within the web setup for the site or the global settings if no site settings are specified.

This is also where a user can edit the email address on the account as well as additional emails. If an email is sent to the user, it will also be sent to the additional emails address listed here.

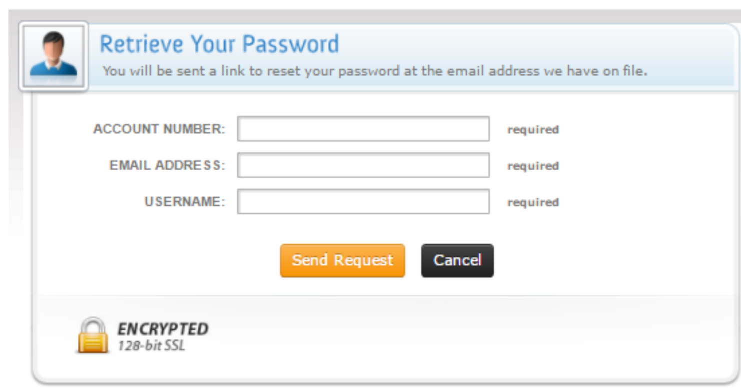


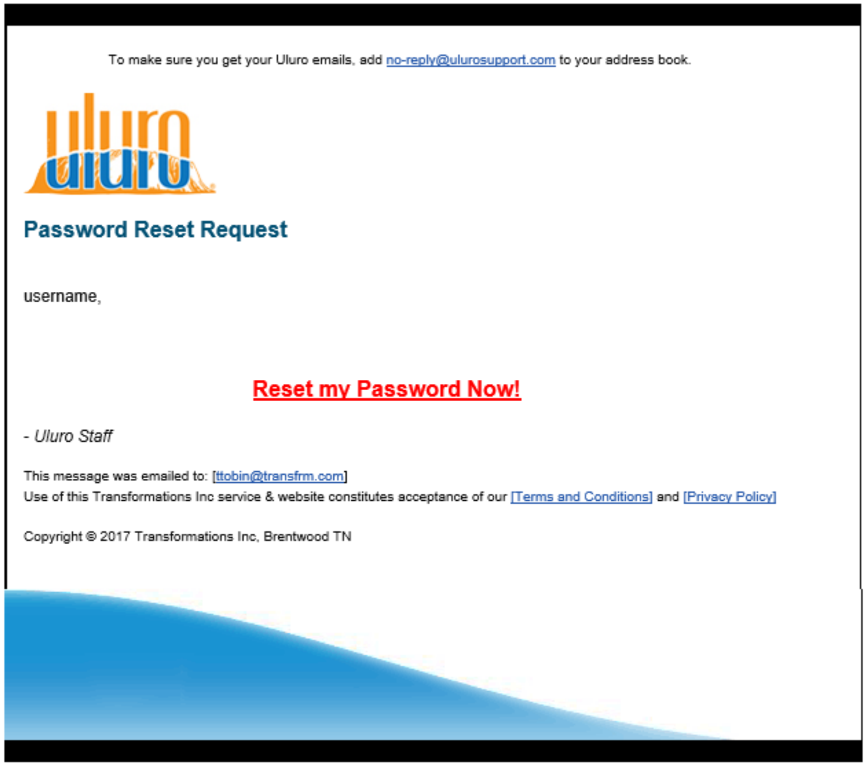
Forgot Password

If a user clicks the Forgot Password link below the login area on the main site, they will be directed to this page.

This is only possible for standard users. Admin and CSR users do not have account numbers, so New Password/Registration Verification must be set up for those users to retrieve their password.

Reset pw – forgot pw on home screen or by admin reseting PW…you will get an email to reset your PW – you will need your account number and usernname to do so



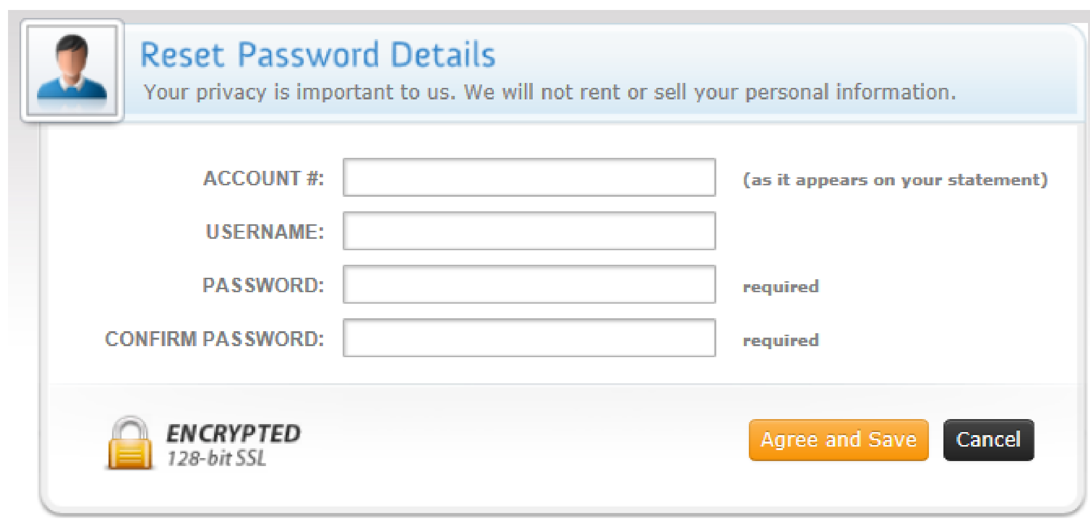


An email will be sent with a link to Reset their password. This email is setup in web setup under the Advanced tab, Page HTML/CSS tab, Emails/Messages tab, Reset Password Email.

The link in the email will direct the user to reset their password. This is the same email and page if an admin resets a user's password.

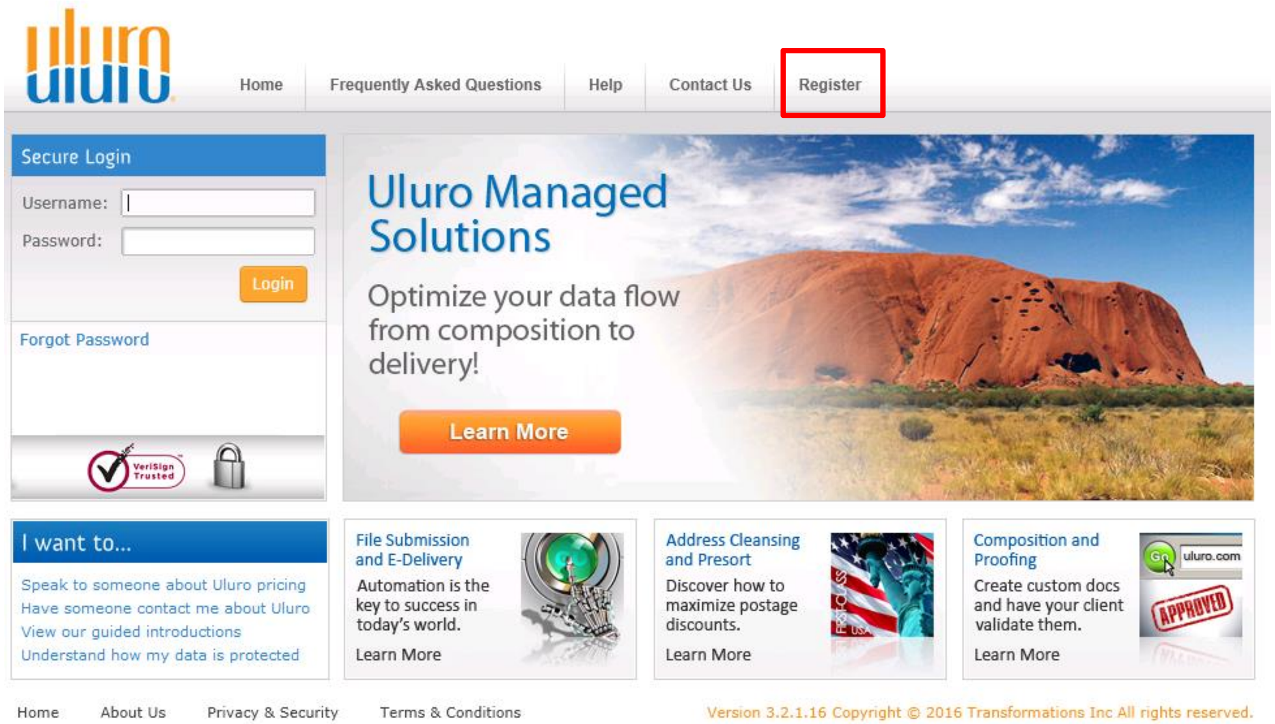
The user will then enter in their account # and new password. The password must meet the password settings determined in web setup or globally set.

Once the user clicks Agree and Save, the new password will take effect.



Self-Registration

On home login page to the site, click REGISTER from the links across the top

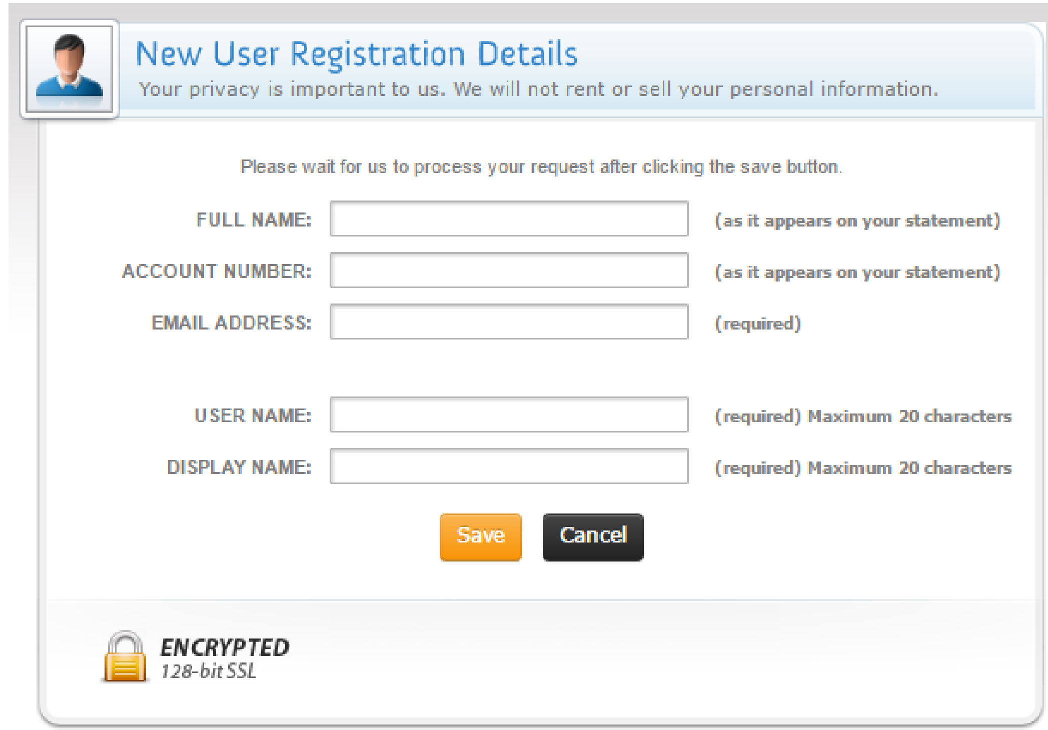


This will direct the user to the New Registration Page. This is the default. It can be edited using the New Password/Registration verification settings within the web setup. This is how an end user would register. This is not designed by default for a CSR user or admin user to self-register.

Full Name – The name on the statement.

Account Number – The account number on the statement.

If the account number and Full name entered do not match a document for this site/client the user will not be able to register util



Tips from Transformations:

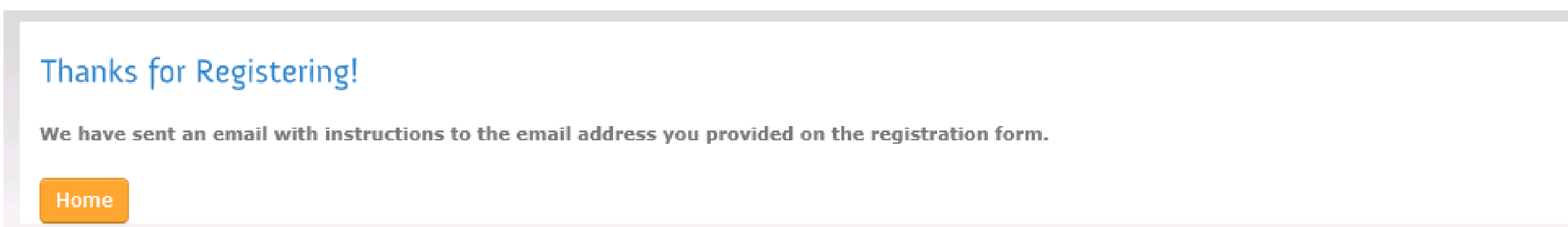
The account number and full name entered must match a document. If there is no record of that name/acct # as part of any submission type for this client, the user will not be able to register. ***Prefixes, capitalization, etc must be speciic to the way the name is displyed on the statement.***

Email Address – This will be the email address the registraion email is sent to and will be saved as the primary email on the account.

Username – The user can enter a desired username for logging into the site

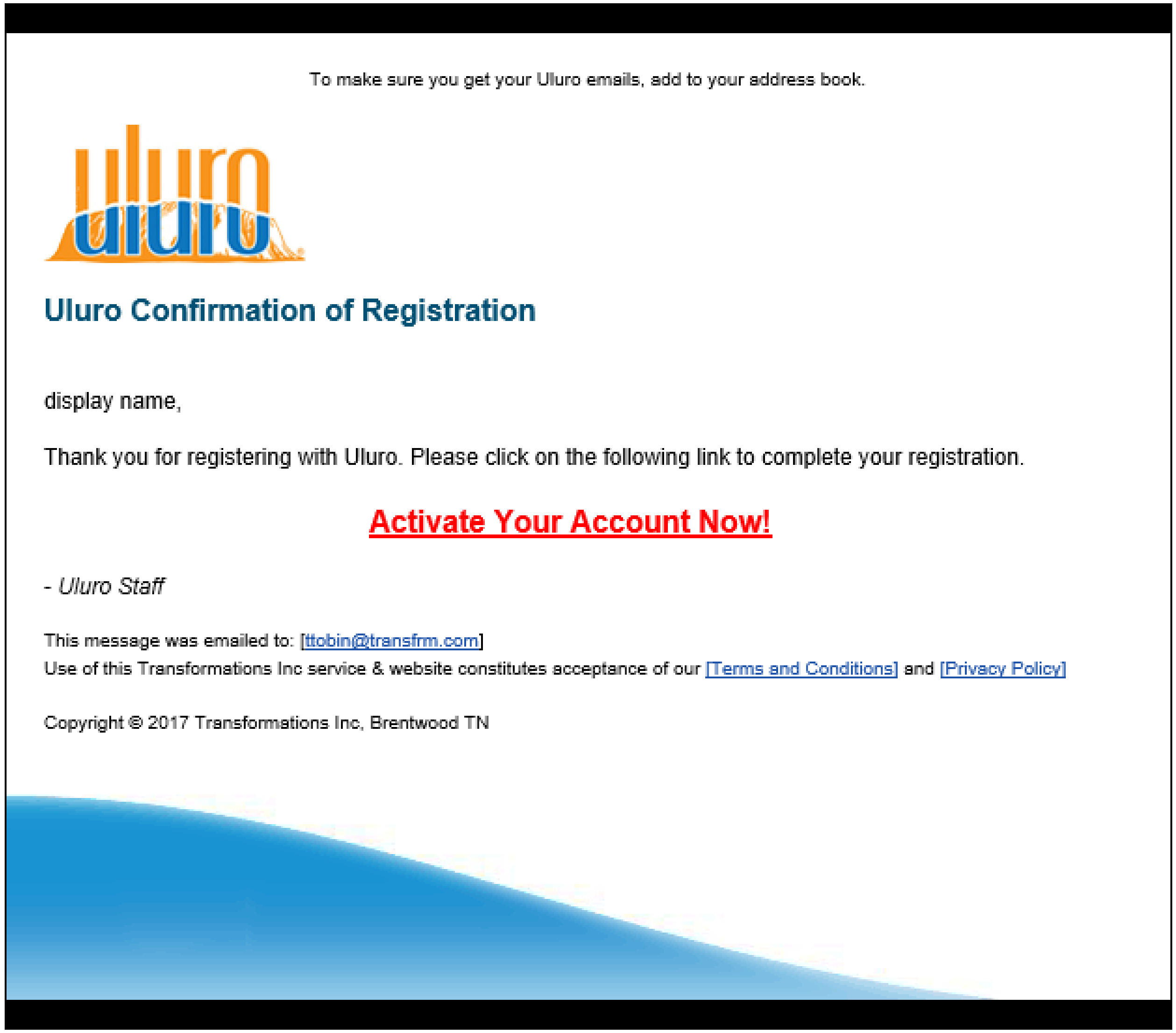
Display Name – This will be displayed in the top right corner when the user logs into the site. It will also be entered as the Full Name in the user's profile.

Once the user has entered their information they will get this:



The user will receive an email with further instructions to activate the account. At this point, the user is not active; the user has a status of N-New. Once the user clicks on the link to activate the acocunt and finishes the registration, they will become A-Active users.

This email is setup in web setup under the Advanced tab, Page HTML/CSS tab, Emails/Messages tab, Register.



To make sure you get your Uluro emails, add to your address book.

Uluro Confirmation of Registration

display name,

Thank you for registering with Uluro. Please click on the following link to complete your registration.

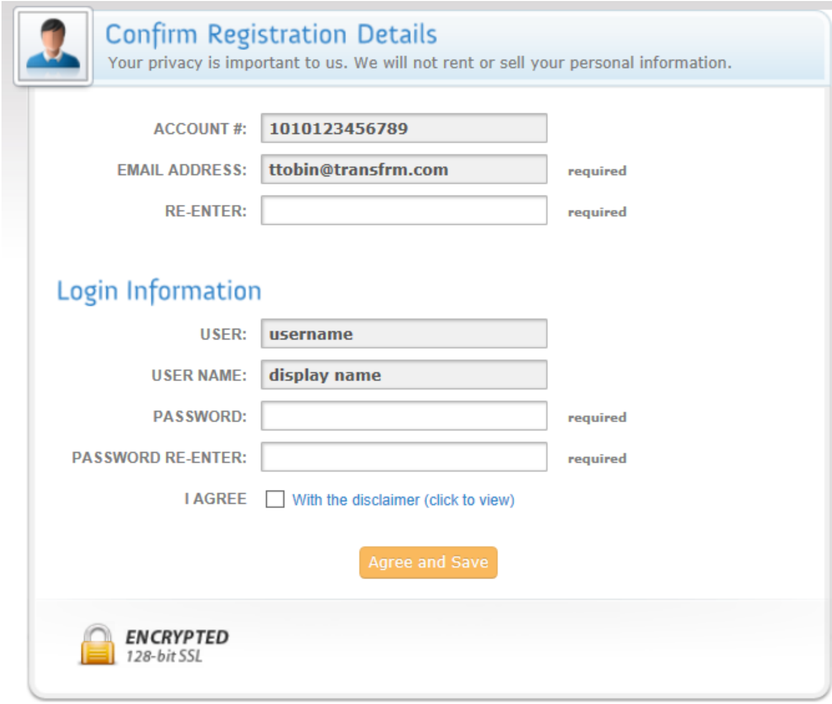
Activate Your Account Now!

- Uluro Staff

This message was emailed to: [ttobin@transfrm.com]
Use of this Transformations Inc service & website constitutes acceptance of our [Terms and Conditions] and [Privacy Policy]

Copyright © 2017 Transformations Inc, Brentwood TN

The activation link directs the user to this page:



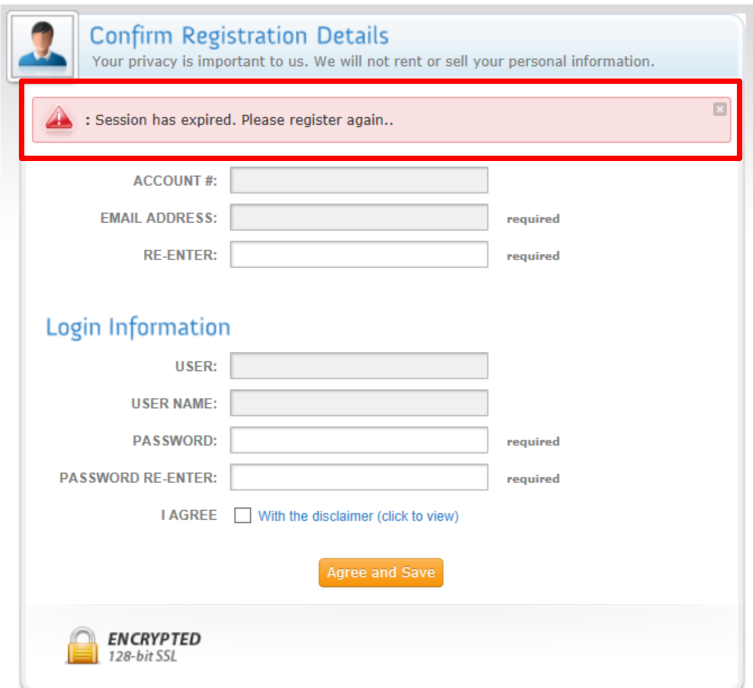
The user will need to confirm the email address and choose a password. If a disclaimer has been enabled, the user can agree to it here. Once Agree and Save is clicked, the user will be registered and change to Active status from New status.

The user is now completely registered and active. They will be able to log into the site.

User – This is the User ID for logging into the site

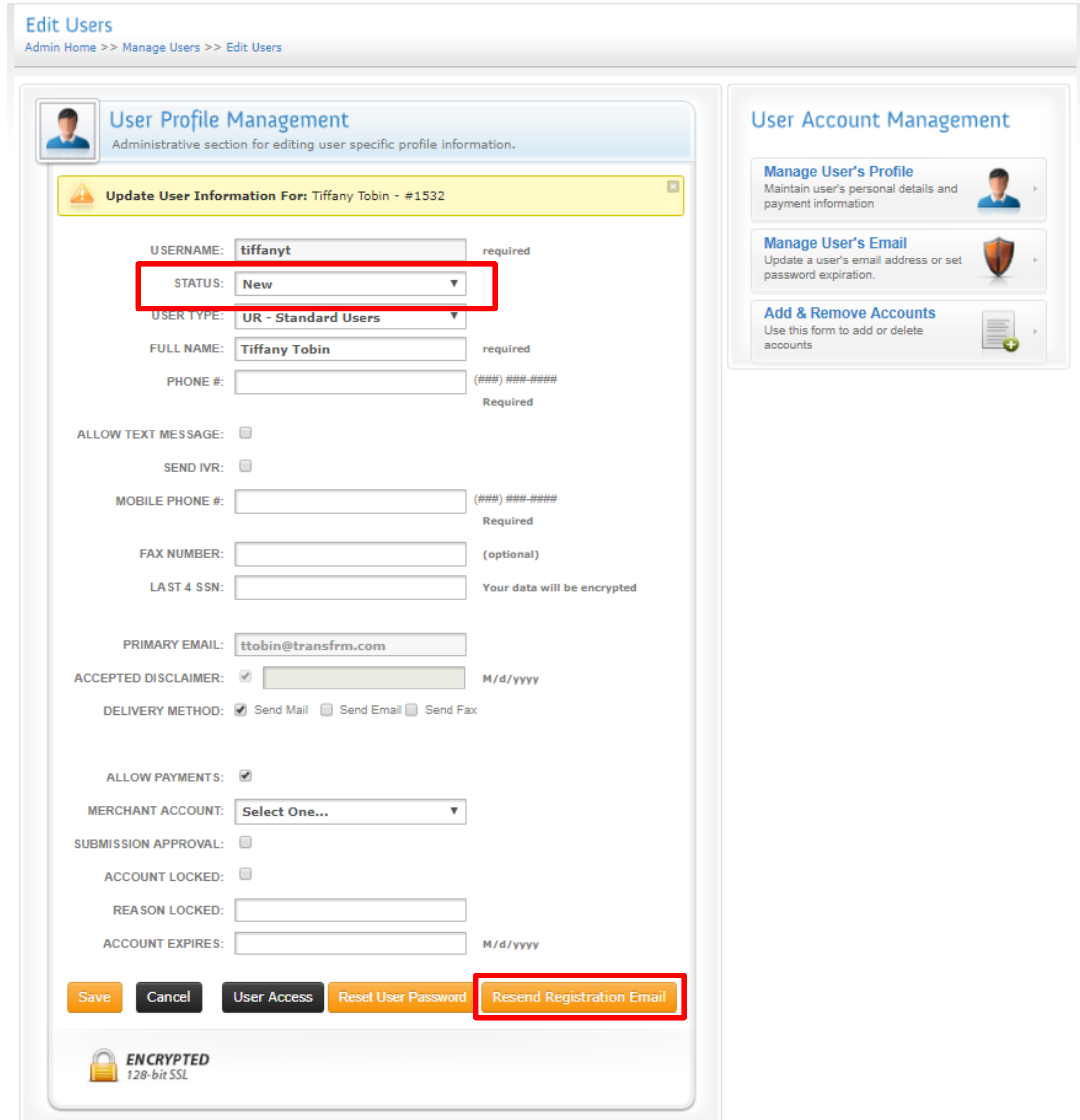
User Name – The display name entered on the Register page. This will be the Full Name stored in the user profile.

Password – This must satisfy the password settings in web setup or set at the global level.



If a user does not complete this registration prior to the email expiring, they will get an error when clicking the link in the email. The email is set to expire by default after 30 minutes.

If the registration email to activate the account expires, an admin user can resend the email. Under manage users, select a user. The **Resend Registration Email** button will only appear here if a Register email has been sent and the user is still in New-N status, meaning their account is ot active yet; they have not completed the registration process.

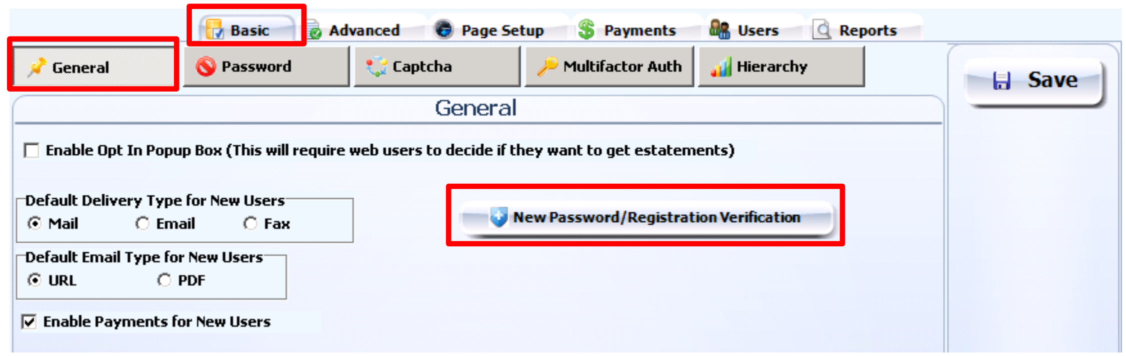


Registration Verification / PasswordVerfication

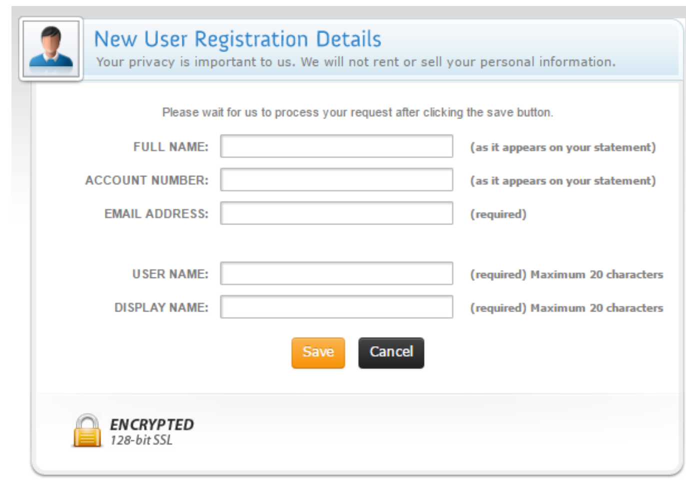
This button can be used to

- Customize the Registration page for standard users
- Customize the Password Recovery for standard users
- Customize the Password Recovery for admin users.

This button is located in the web setup under the basic tab. Select the General menu.

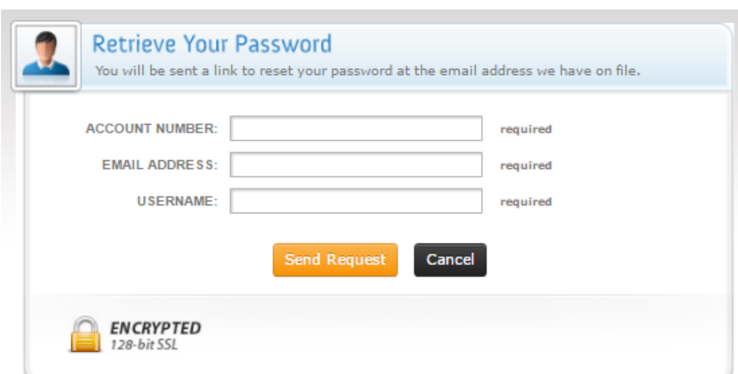


Registration



By default the registration page will appear like this if a user clicks the Register link on the main page of the website.

If you would like to chage any of the requirements for a new user to self-register, click the New Password/Registration Verification button.



Password Recovery

By default the forgot password link takes you to this page. This can only be used for standard users sicne those web users will have account numbers. This cannot be used for CSR or admin accounts. In order for CSR or admin users to retrieve their password, this feature must be enabled and setup.

Enable for Registration – Check this for the changes to take effect on the Reigster page.

Enable for Password Recovery – Check this for the changes to take effect on the page that the forgot password link directs a user to in order to retrieve their password.

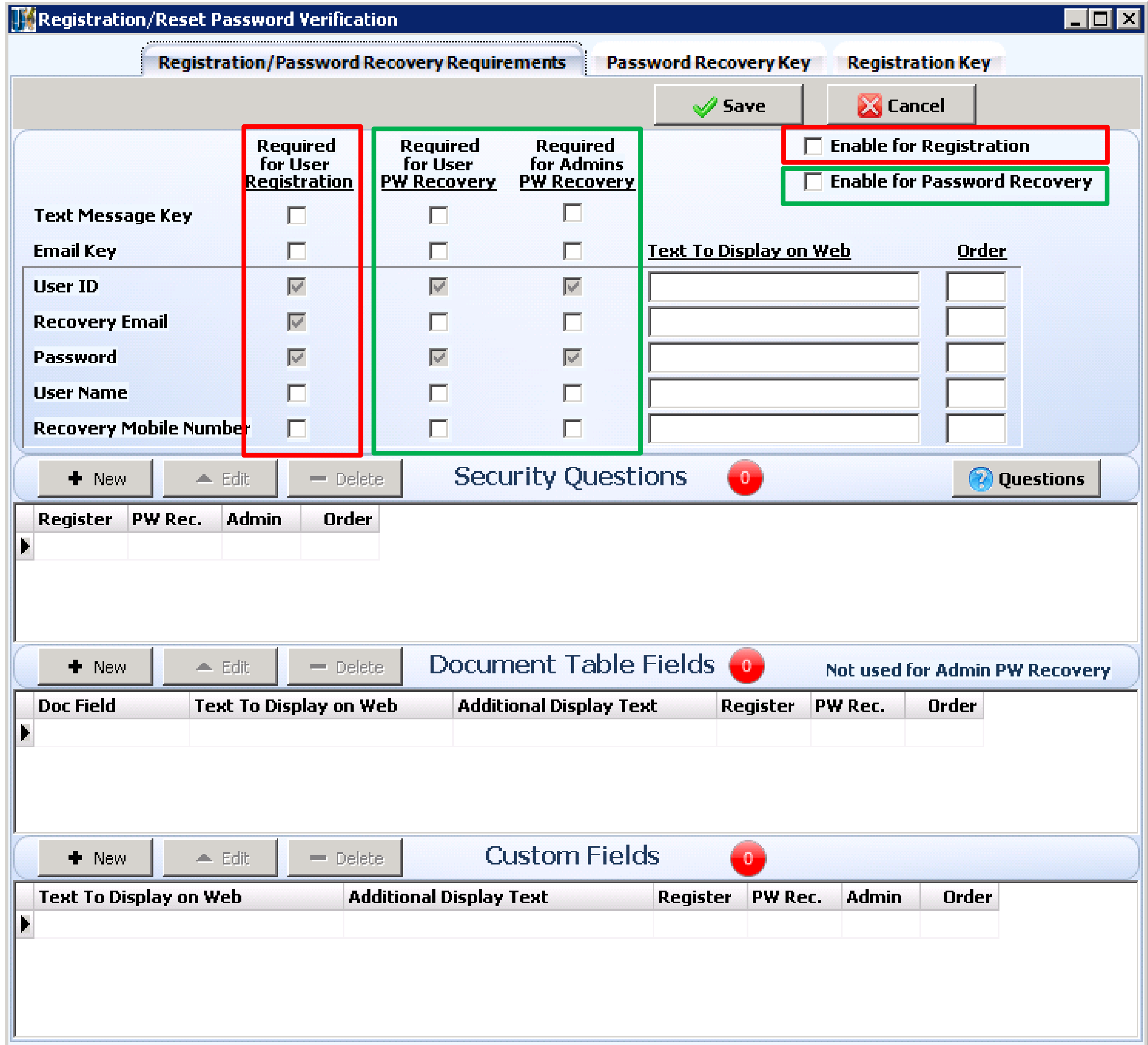
All of the settings here are set up the same for registration and password recovery.

Required for User Registration – The boxes checked under this heading will be displayed on the registration page that standard users will use to register. These fields will be required.

Required for User PW Recovery – The boxes checked under this heading will be displayed on the password recovery page that standard users will be directed to after clicking Forgot Password on the main site and entering their username. These fields will be required.

Required for Admins PW Recovery – The boxes checked under this heading will be displayed on the password recovery page that admin (and CSR) users will be directed to after clicking Forgot Password on the main site and entering their username.

Text to Display on Web – This will be the text that appears to the left of each field on the registration or Password Recovery page.

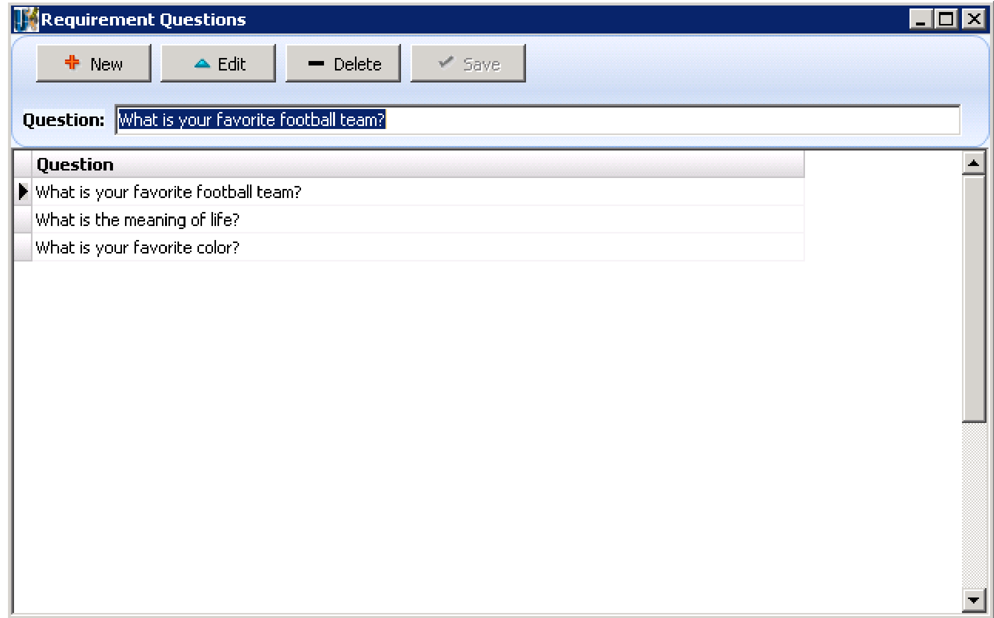


Order – This is the order that the items are displayed on the registration page depending on the numbers entered in the order slot.

In addition, you can require security questions, document fields, and custom fields.

Security Questions

Click the Questions button to create the questions that will be asked of users during registraion or password recovery.

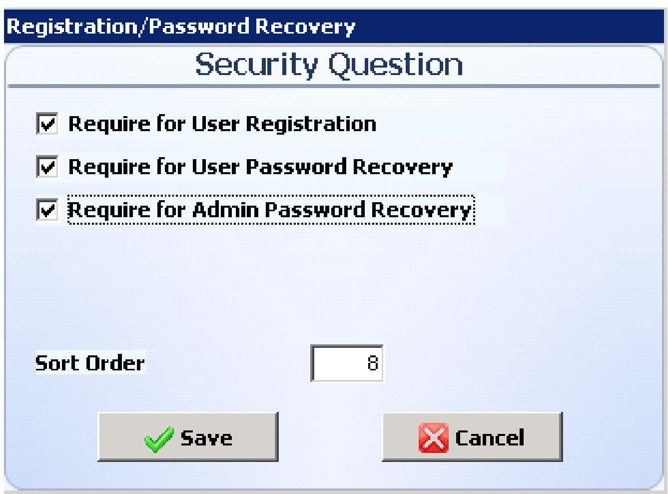


Once created, you can create up to that number but clicking New:

Require for Registration – This will add the question to the list of items a user must enter during New Registration. It will appear in the order you enter here.

Require for User Password Recovery - This will add the question to the list of items a user must enter to retrieve their password. It will appear in the order you enter here.

Require for Admin Password Recovery - This will add the question to the list of items an admin user must enter to retrieve their password. It will appear in the order you enter here.



Tips from Transformations:

The number of questions enabled here will be how many a user must choose to answer. The security question will be a dropdown menu of all of the security questions that have been created.

Document Table Fields

Click the New button to create the fields that are found on the document that will be asked of users during registraion or password recovery. These will only be used for standard users since admin/CSR users do not receive documents.

Require for User Registration – This will add the field to the list of items a user must enter during New Registration. It will appear in the order you enter here.

Require for User Password Recovery - This will add the field to the list of items a user must enter to retrieve their password. It will appear in the order you enter here.

Document Field – This is a mapped field that is displayed on the document.

Tips from Transformations:

This must be a field that is created in the map. It can come from the data. It is for information that a user would have on the document.

Text to Display on Web – This will be the text that appears to the left of each field on the registration or Password Recovery page.

Additional Message – This is the text that will appear below the text to display on web. It will be lighter and smaller text than the text to display on web.

Order – This is the order that the items are displayed on the page depending on the numbers entered in the order slot. If two items have the same number, it will list them in the order they appear on this screen from top to bottom.

Custom Fields

Click the New button to create a custom field. This can be anything.

Require for User Registration – This will add the field to the list of items a user must enter during New Registration. It will appear in the order you enter here.

Require for User Password Recovery - This will add the field to the list of items a user must enter to retrieve their password. It will appear in the order you enter here.

Require for Admin Password Recovery - This will add the question to the list of items an admin user must enter to retrieve their password. It will appear in the order you enter here.

Text to Display on Web – This will be the text that appears to the left of each field on the registration or Password Recovery page.

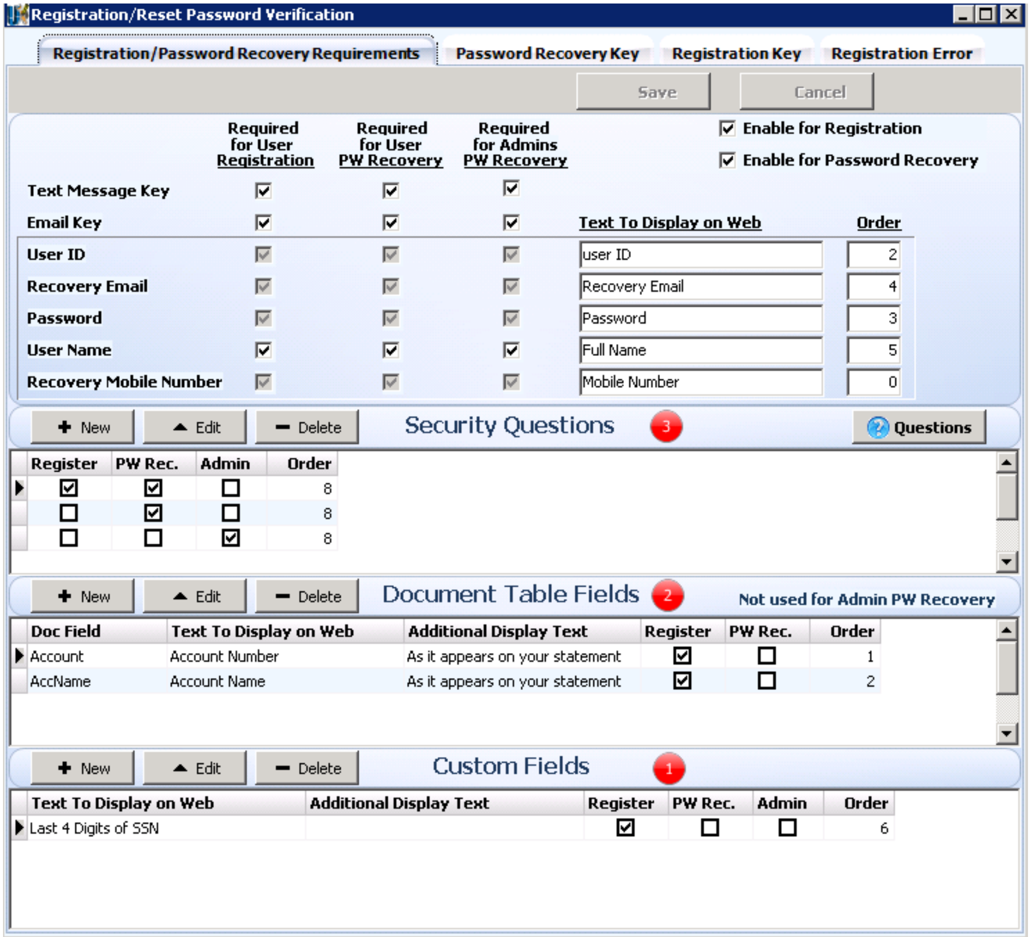
Additional Message – This is the text that will appear below the text to display on web. It will be lighter and smaller text than the text to display on web.

Order – This is the order that the items are displayed on the page depending on the numbers entered in the order slot. If two items have the same number, it will list them in the order they appear on this screen from top to bottom.

Tips from Transformations:

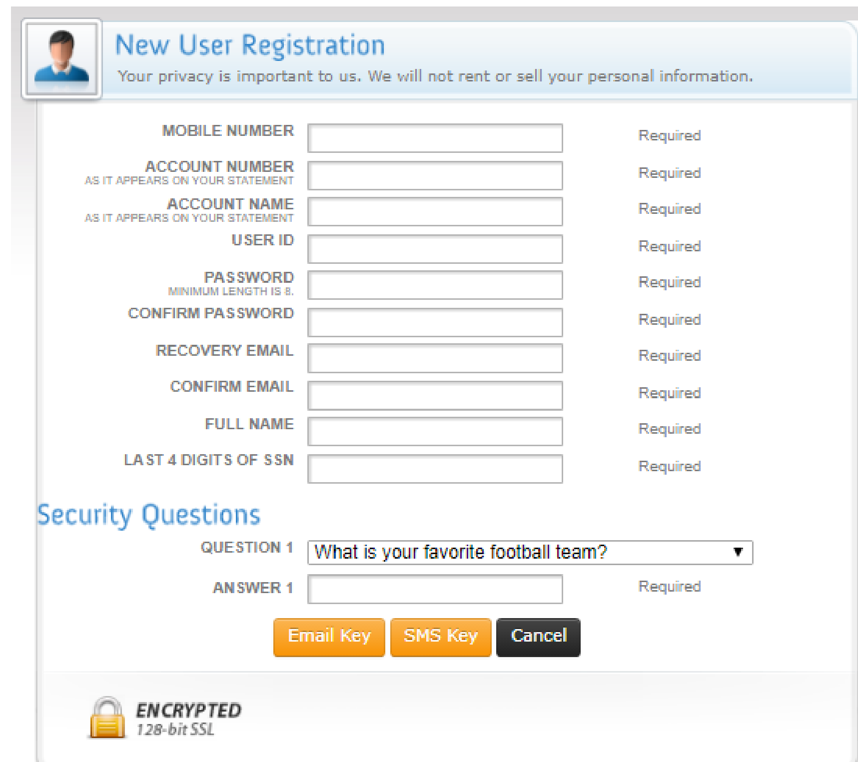
The settings for Registration/Password Verification do not effect how an admin creates a new user under Manage Users on the admin home page. These settings will not take effect until the user created logs inot the site. Upon logging on, the user must answer these questions/fields.

Sample:



Tips from Transformations:

The account number and full name entered must match a document. If there is no record of that name/acct # as part of any submission type for this client, the user will not be able to register. *Prefixes, capitalization, etc must be speciic to the way the name is displyed on the statement.*

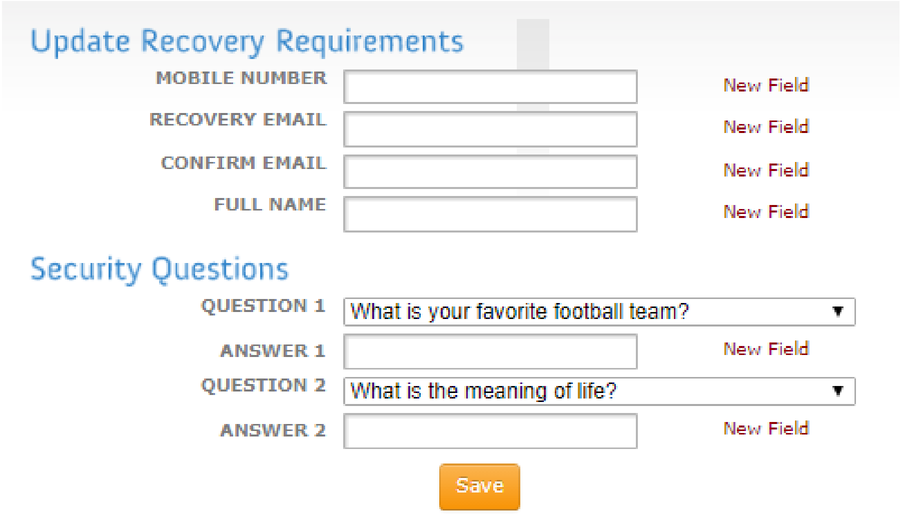


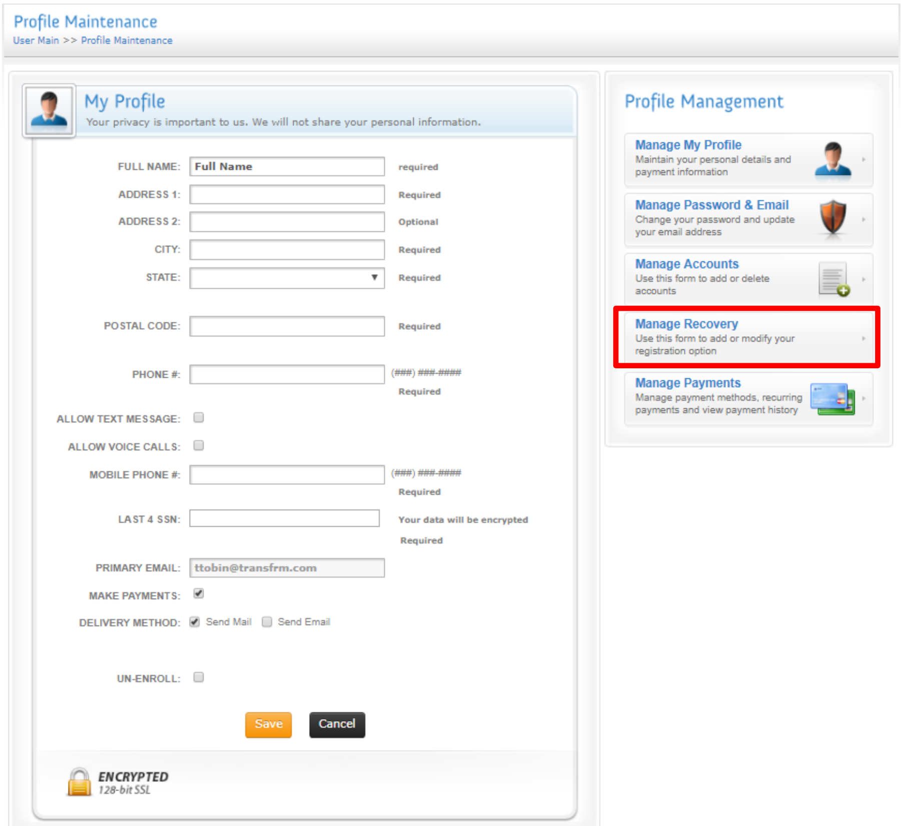
Only the number of questions enabled specifically for registration will be asked at this point. The user can choose from all the questions created using the dropdown. The ones that the user does not select here will be asked upon the initial login to the site.

Once the user completes New registration and/or enters a key the user is Active; there is no registration email sent to users.

If a setting has been changed, or the user was created by an admin manually, the user will be asked the additional information upon the next login.

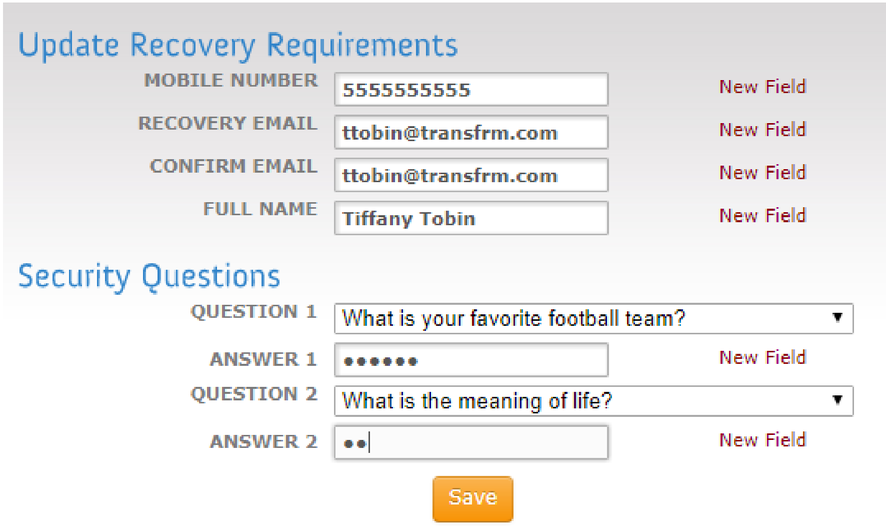
Example:





Users can edit the answers to the fields/questions for Verification. Under a user's profile, the user can cick Manage Recovery.

This allows a user to edit the answers to the security questions as well as the items required for Password Recovery.



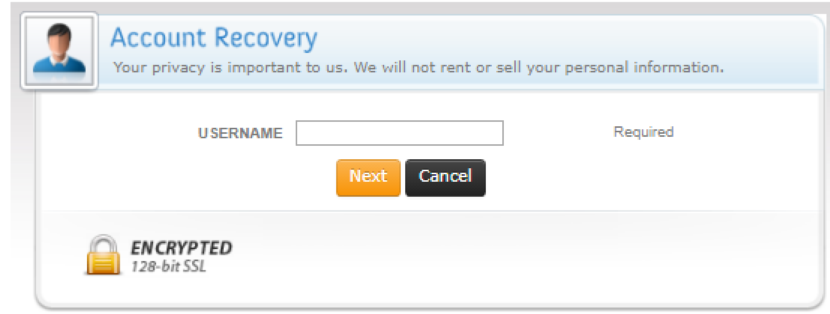
Tips from Transformations:

If a user changes the Full name field for example under Manage Recovery, it will NOT update that same field within their profile maintenance. The reverse is also true; a user must update both areas with new information.

The recovery fields are not linked to the same fields in the database as the profile fields. The text displayed for registration can be anything so there is no way to link the profile and recovery.

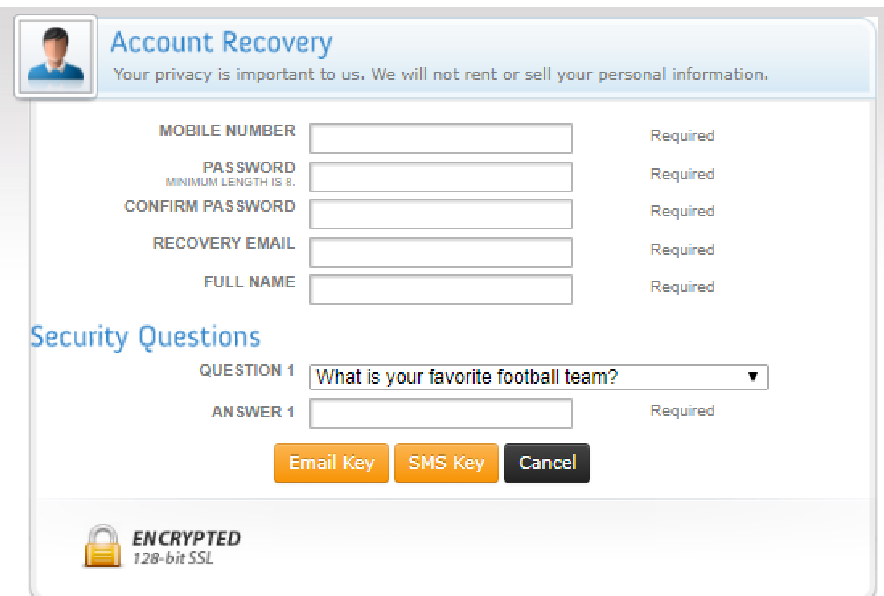
When a user is using Password Recovery, what they enter MUST match what is currently in Manage Recovery, not what is on their profile, if they differ.

On the main page of the site, click Forgot Password. All users will be directed to this page when Password Recovery is enabled.



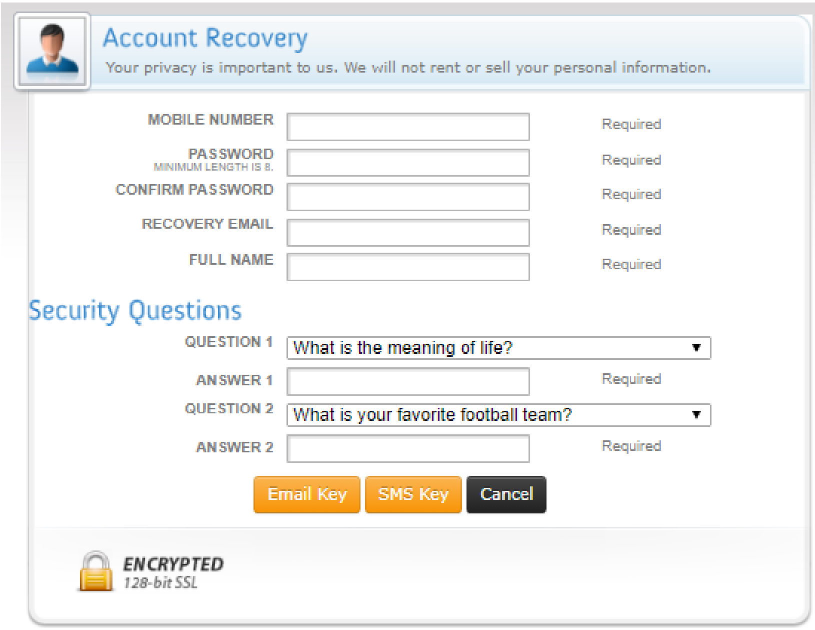
Sample Password Recovery – admin users

If an admin username is entered, users will be directed to the Account Recovery page for admins. This will reflect the settings enabled for Admin PW Recovery.



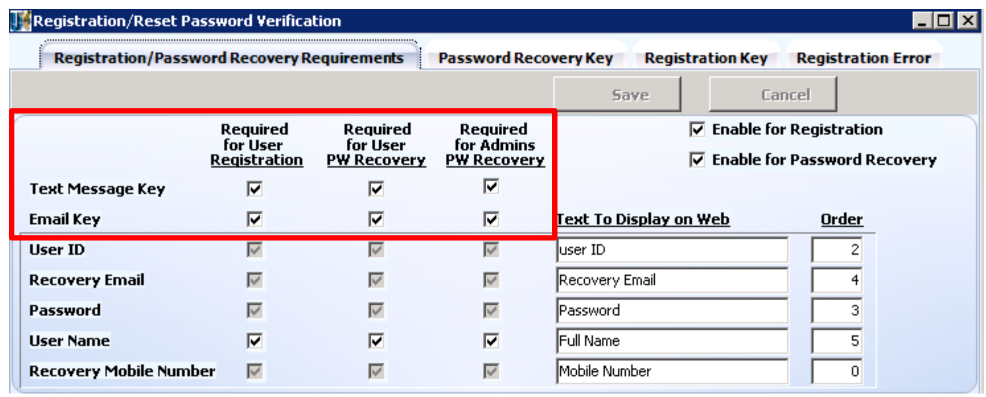
Sample Password Recovery – standard users

If an standard user's username is entered, users will be directed to the Account Recovery page for standard users. This will reflect the settings enabled for User PW Recovery.

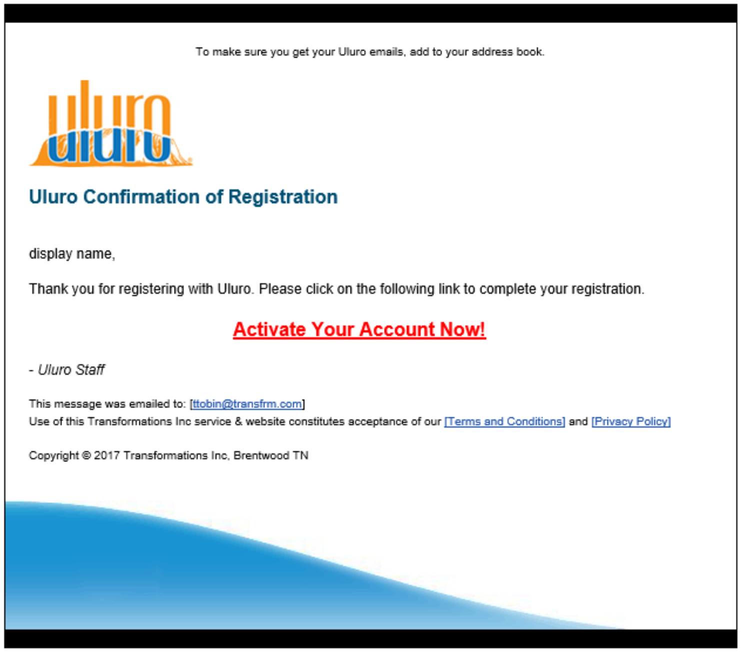


Text Message Keys / Email Keys

Users wil receive an email with a key rather than a link if either or both of these are enabled. To enable, check the key(s) that can be used to register or retrieve a password.



If the keys are disabled for Registration, the user will fill out the registration fields and click the Save button. At that point the Register email (located in web setup>Advanced tab>Page HTML/CSS>Emails/Messages>Register tab) will be sent to the user containing a link for the user to activate their account and complete New Registration.

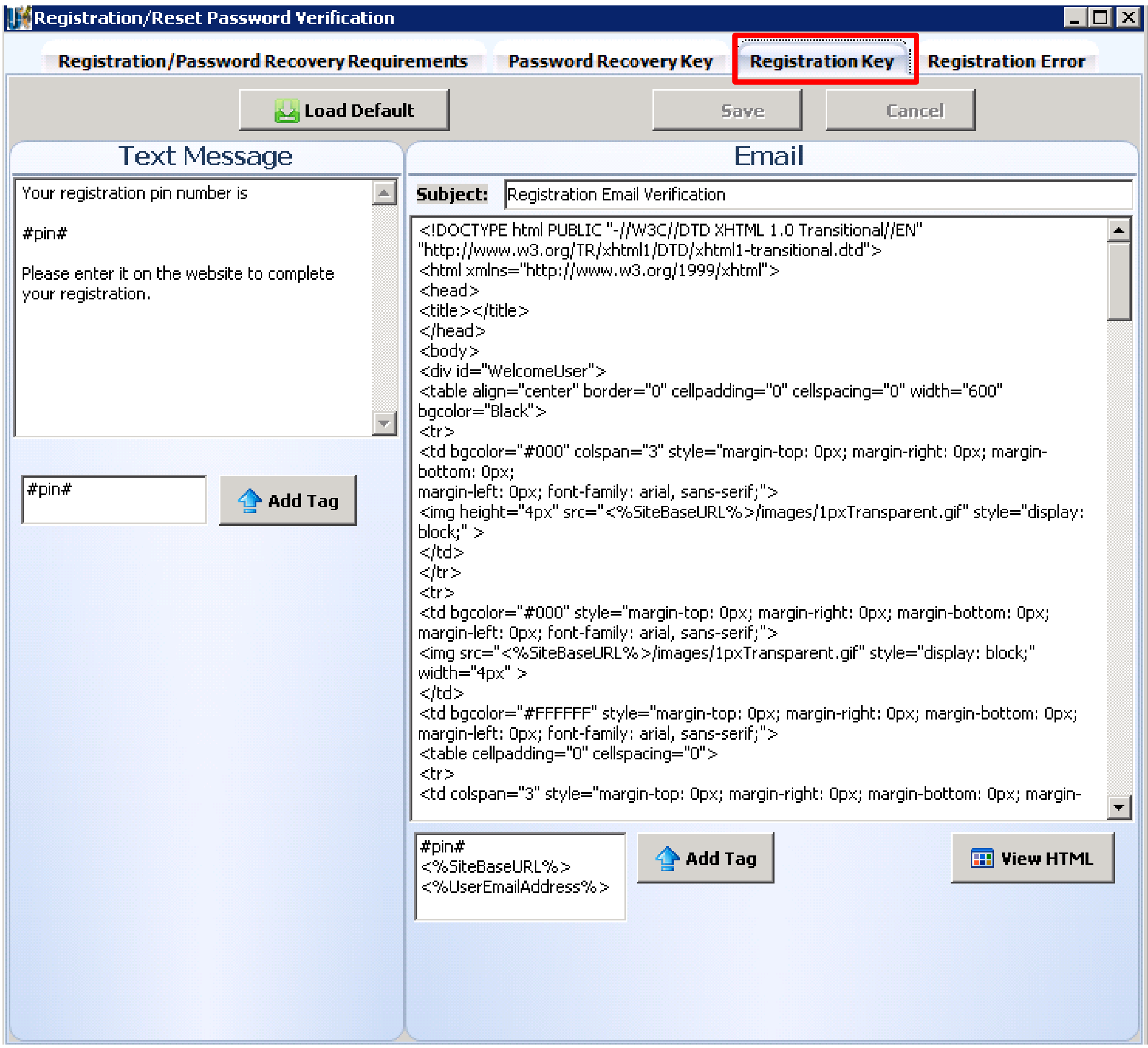


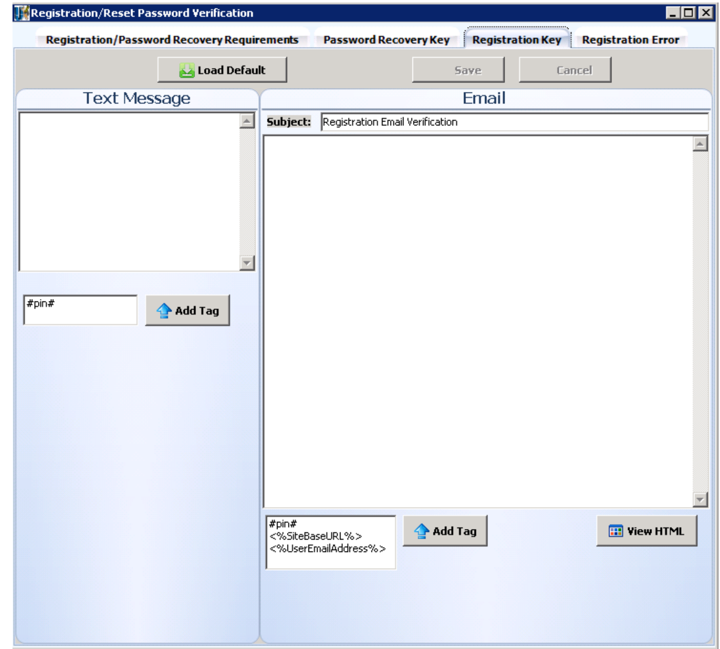
Tips from Transformations:

In order to use a Text Message key for Registration or Password Recovery, uDeliver is required.

If the keys are enabled, the Email/Text Message must be setup.

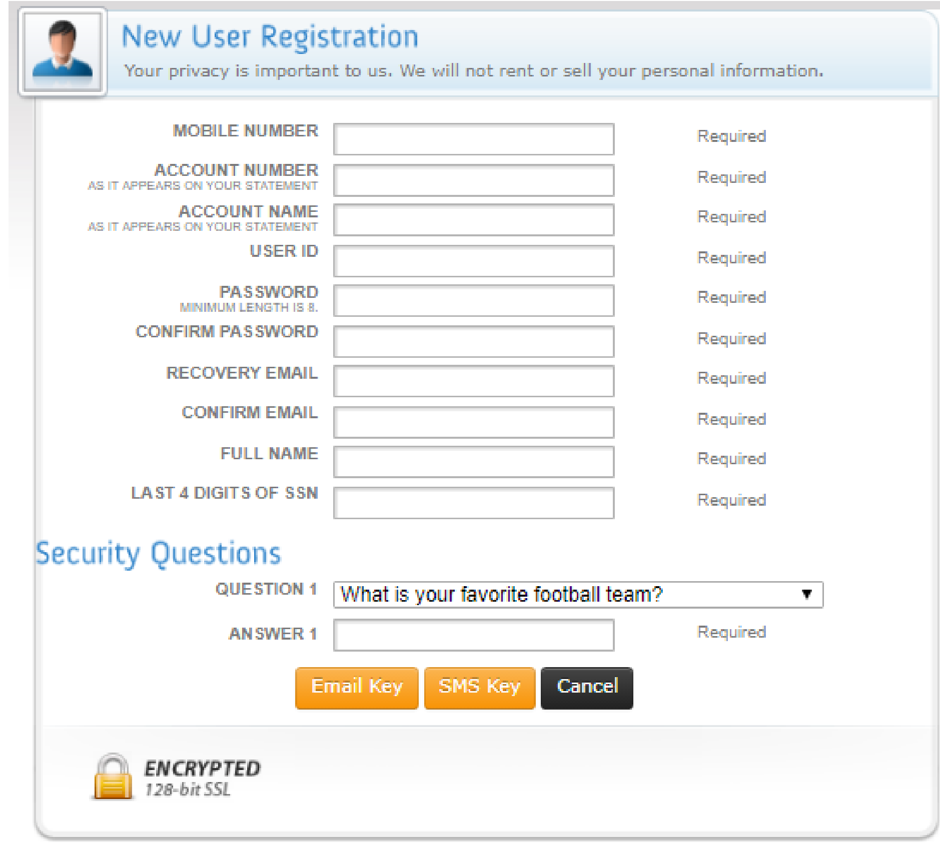
Initially everything under this tab is blank If you click the Load Default button, the default email and text message will be loaded. You can use the defaults, modify, or create your own.

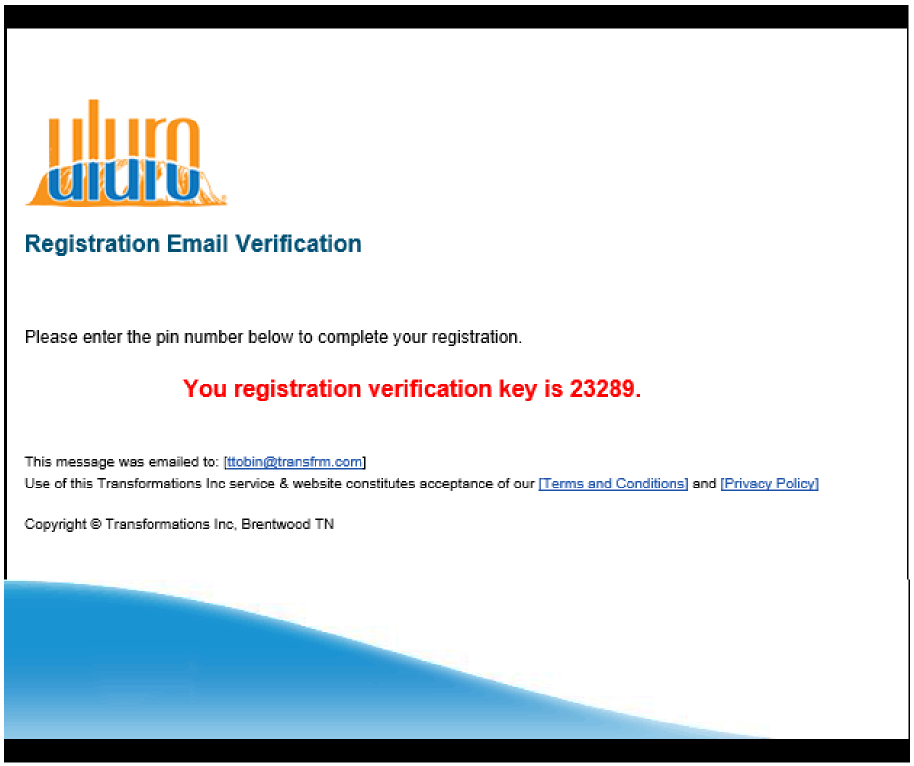




If email/text message keys are enabled for registration, the user can click the one that is enabled, or either if both are enabled. The user only has to receive one key to register.

The Key buttons have replaced the Save button. Once a user clicks on the key type, they will receive an email or text message with the key that was previously setup under the Registration Key tab.

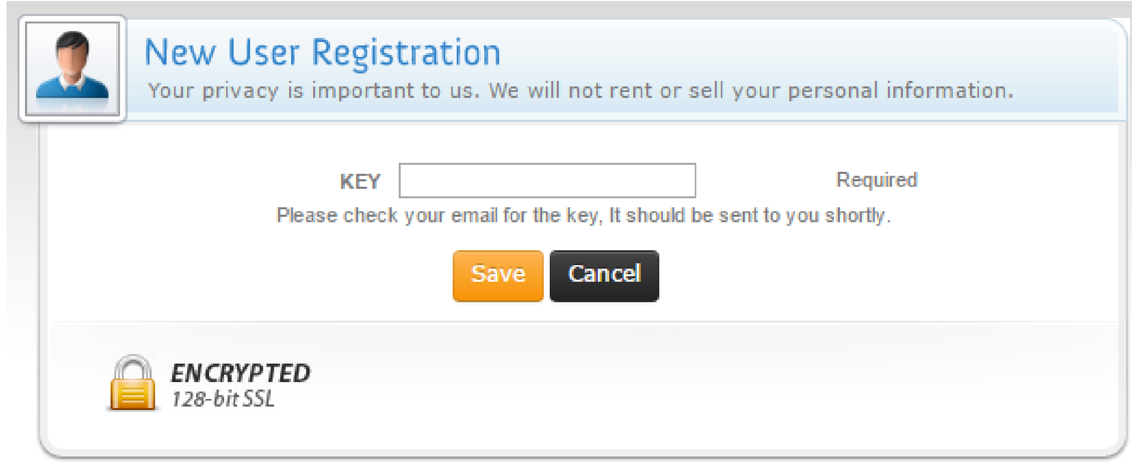


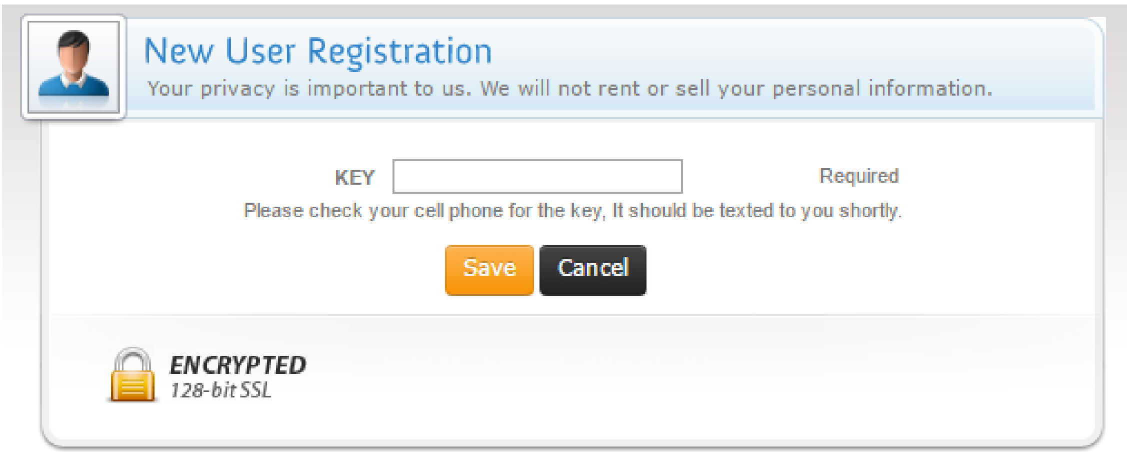


Tips from Transformations:

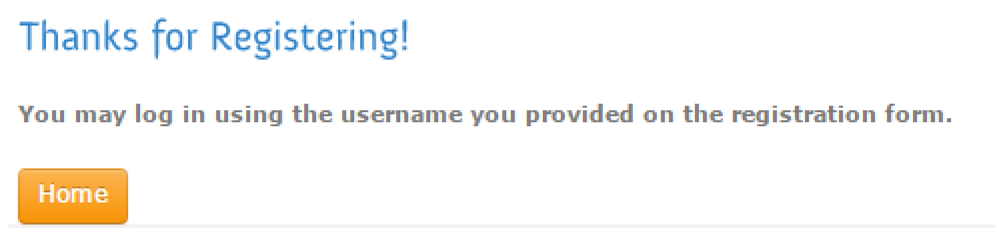
The keys will expire after ten minutes or if another attempts is made within that time.

Depending on which key button is clicked, the user will get one of these:



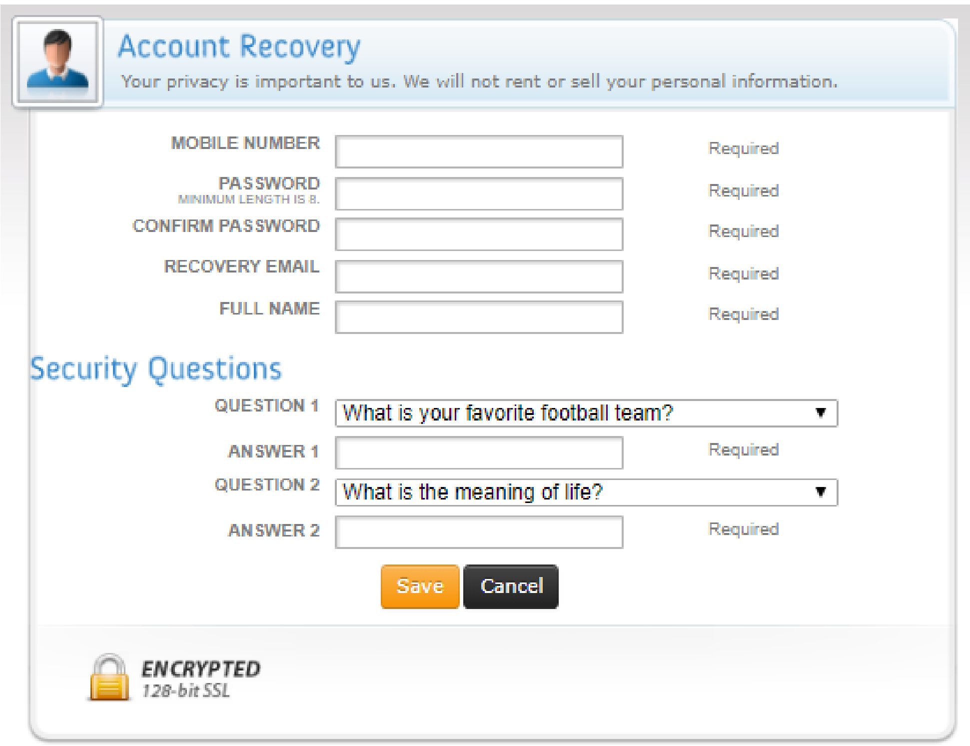


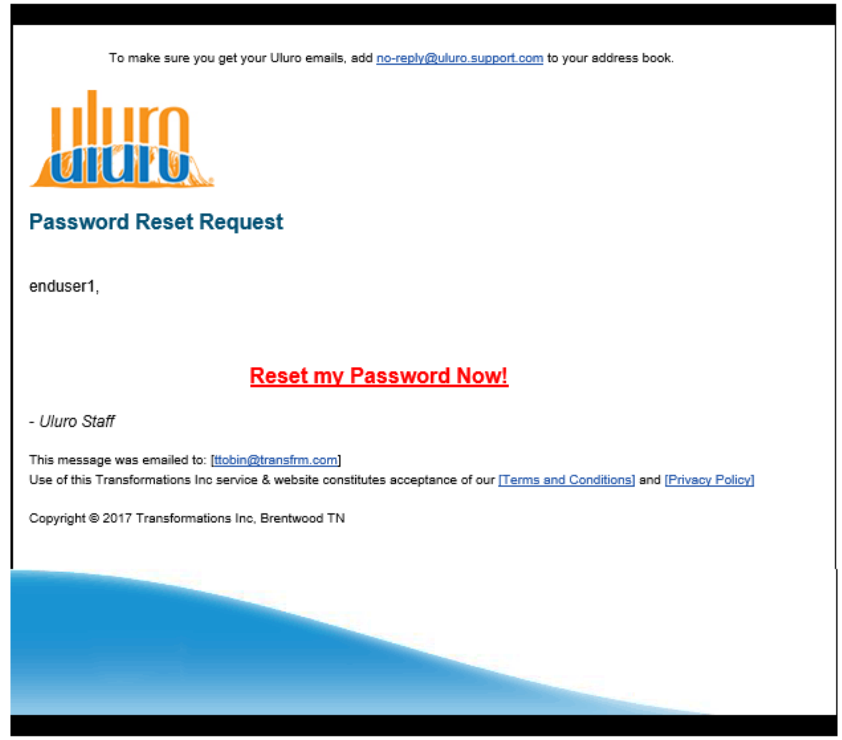
Once the key from the email or text message has been entered, the user will get a confirmation screen.



If the keys are disabled for Password Recovery, the user will fill out the necessary fields and click the Save button.

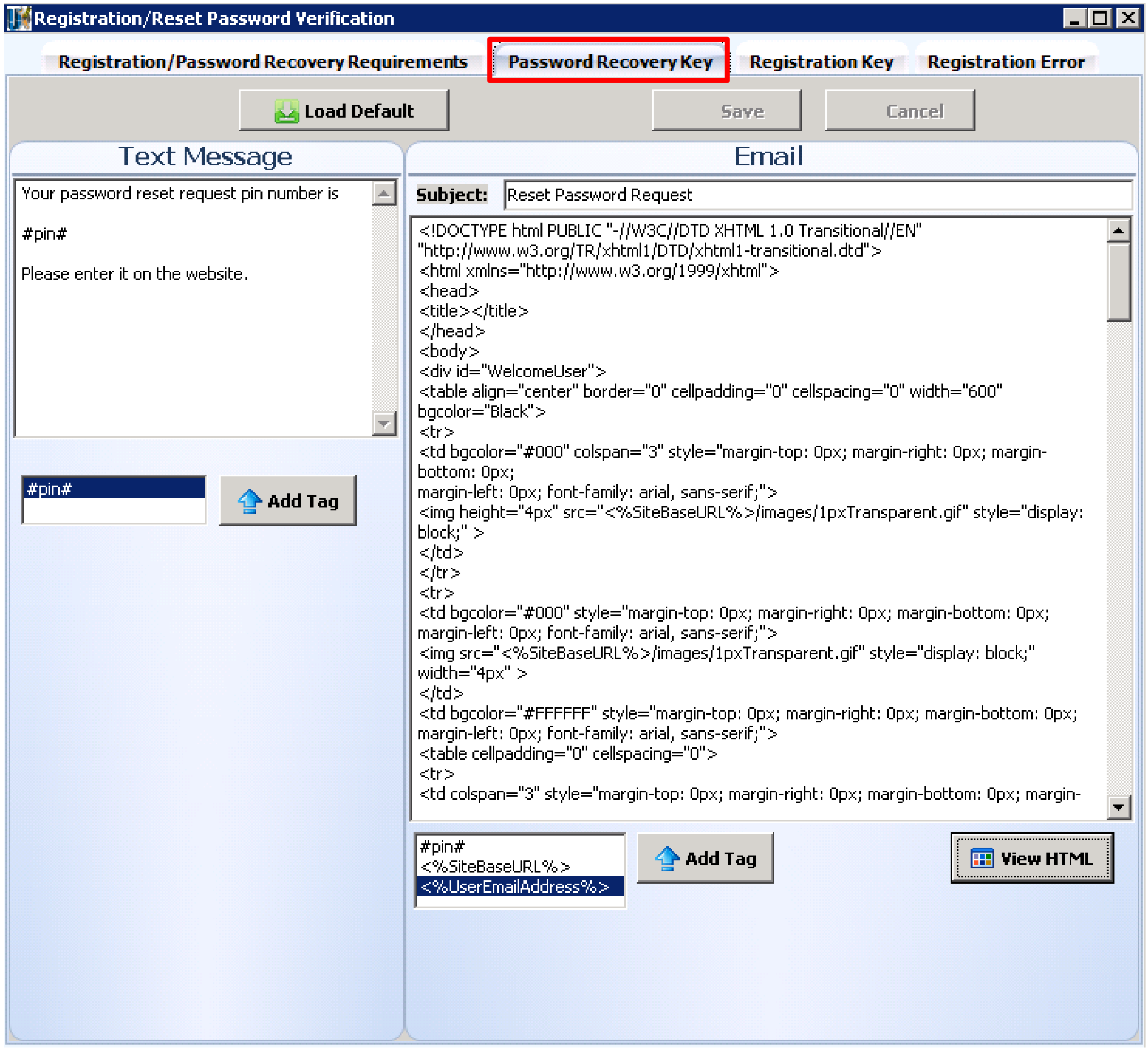
At that point the Register email (located in web setup>Advanced tab>Page HTML/CSS>Emails/Messages>Reset Password Email tab. The Reset Password email will have a link for the user to reset their password.

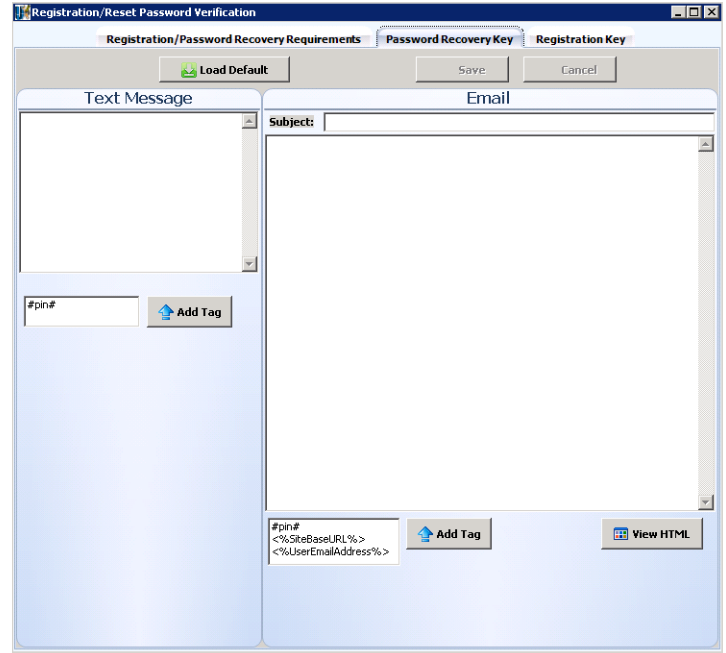




If the keys are enabled, the Email/Text Message must be setup.

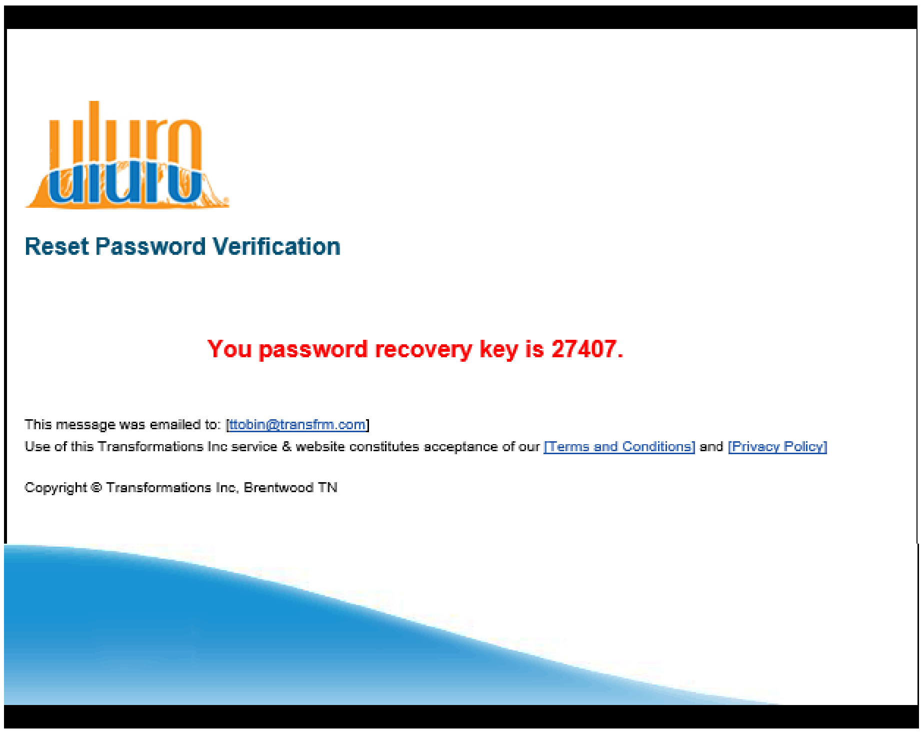
Initially everything under this tab is blank If you click the Load Default button, the default email and text message will be loaded. You can use the defaults, modify, or create your own.

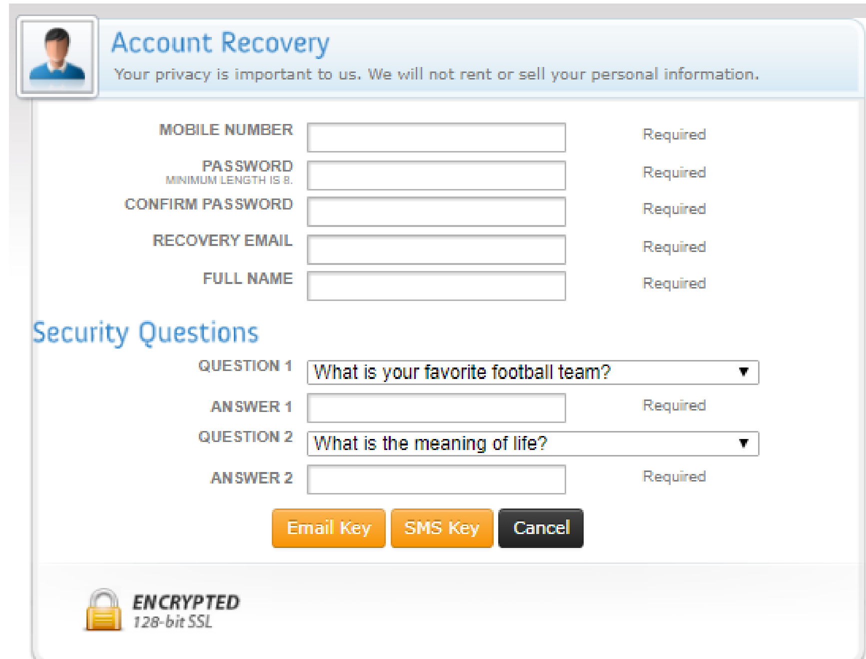




If email/text message keys are enabled for Password Recovery, the user can click the one that is enabled, or either if both are enabled. The user only has to receive one key to reset their password.

The Key buttons have replaced the Save button. Once a user clicks on the key type, they will receive an email or text message with the key that was previously setup under the Registration Key tab.

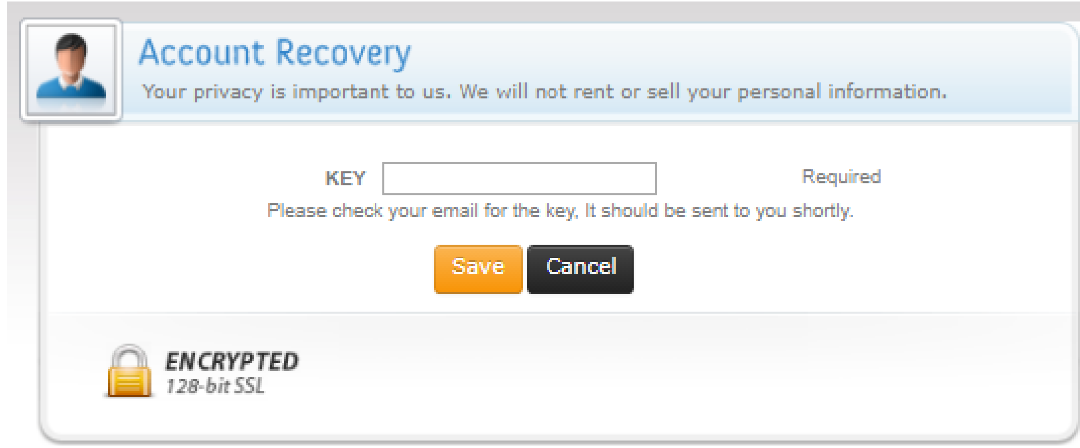


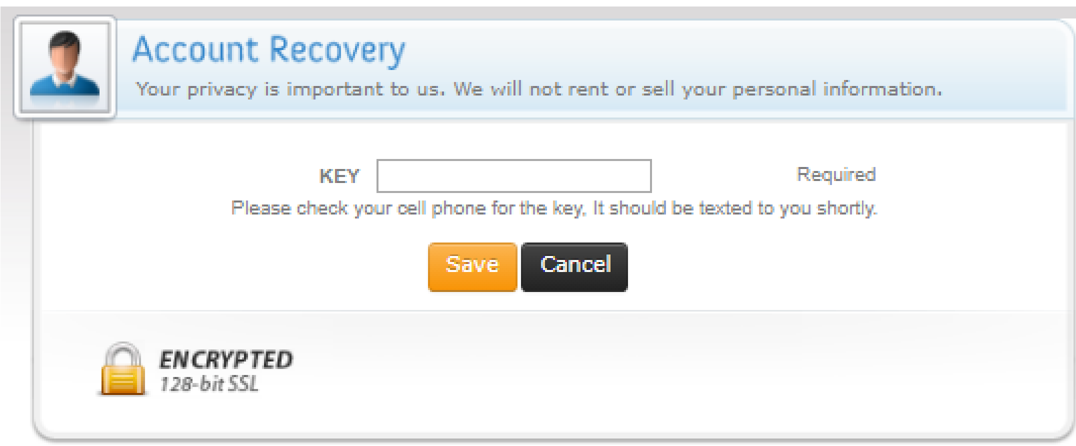


Tips from Transformations:

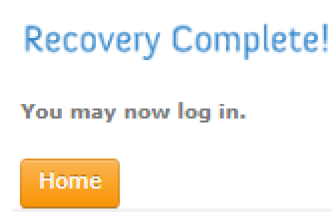
In order to use a Text Message key for Registration or Password Recovery, uDeliver is required.

Depending on which key button is clicked, the user will get one of these:

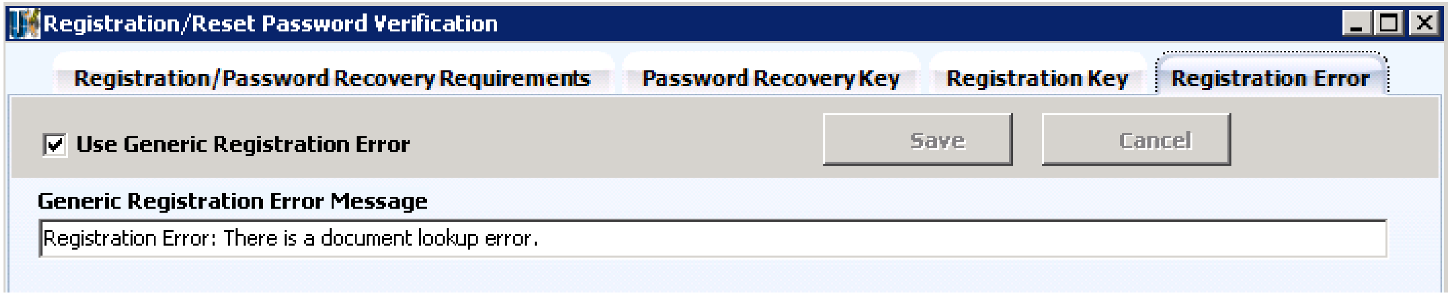




Once the key from the email or text message has been entered, the user will get a confirmation screen.



Registration Error

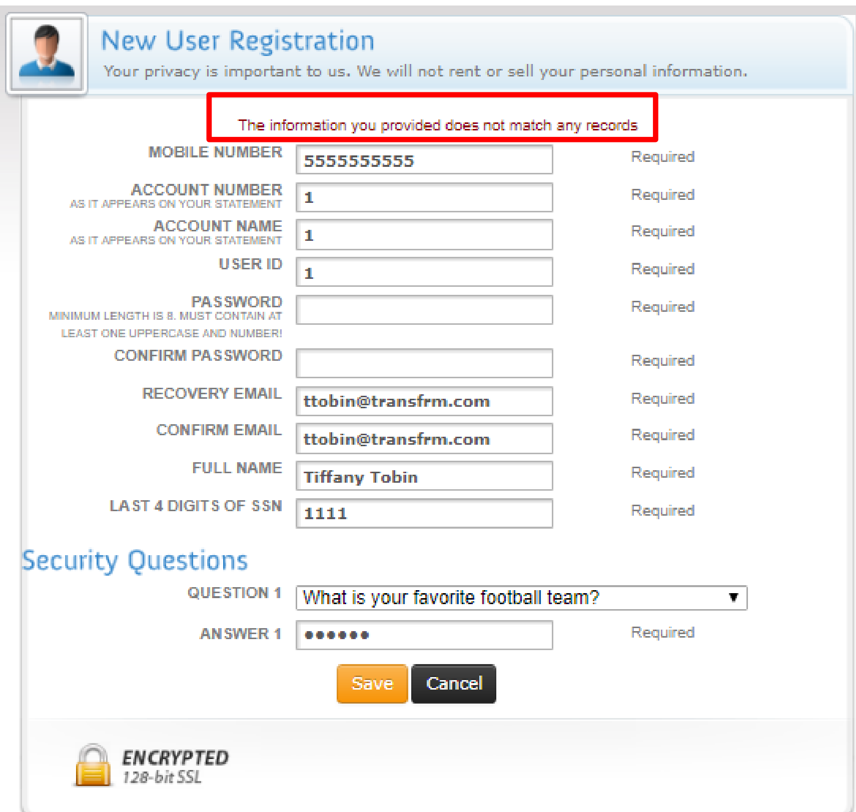


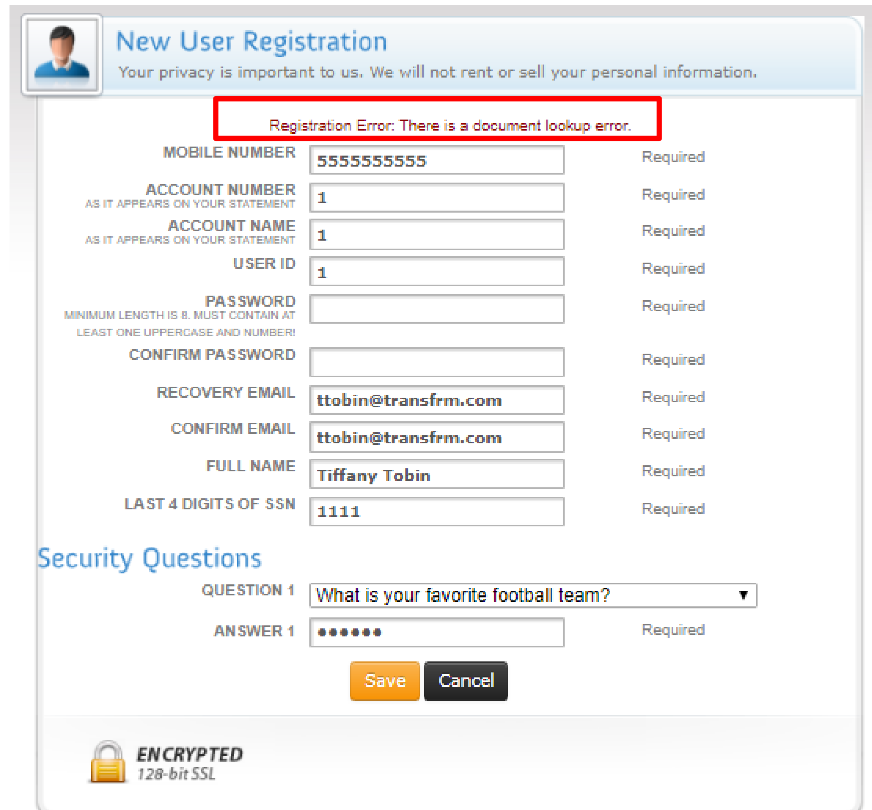
Checking the box turns on the generic registration error message. Enter any error message that you would like to be displayed at the top of the registration fields.

This error is triggered by a document lookup error based on the account number and account name. If there is no record for the account number and name filled in by a user, the error will be displayed. These two fields must match what is on the statement EXACTLY or this error will be generated.

If this is unchecked, the default error "The information you provided does not match any records" will be displayed instead.

Click save for the changes to take effect for the New Registration page.





Emails/Messages (Register, Reset Password, Enrollment, and Unenrollment)

All of these emails can be customized. They can all be found under the Advanced tab, click the Page HTML/CSS tab long the left side, select the Emails/Messages tab.

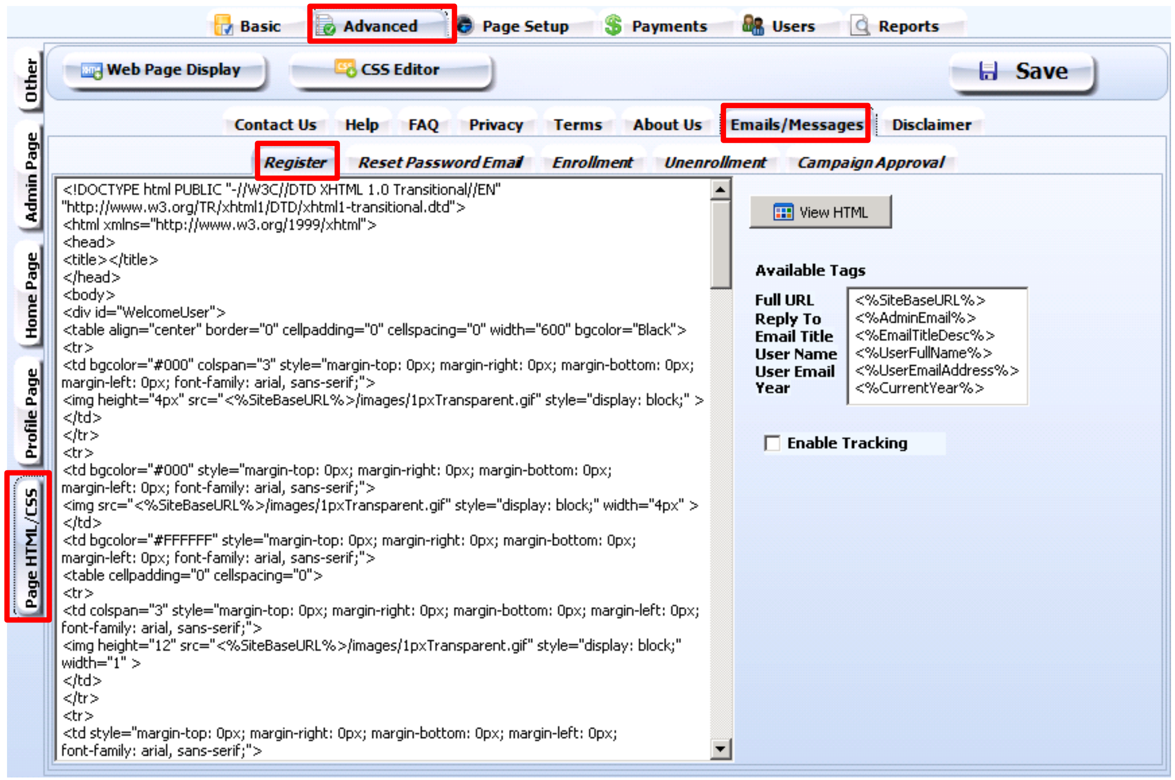
Customize the email, and click the View HTML button to preview the email. You can add variable tags throughout the email. If you are using Mandrill to track emails, check the Enable Tracking box on any of these emails to have track the emails that are sent.

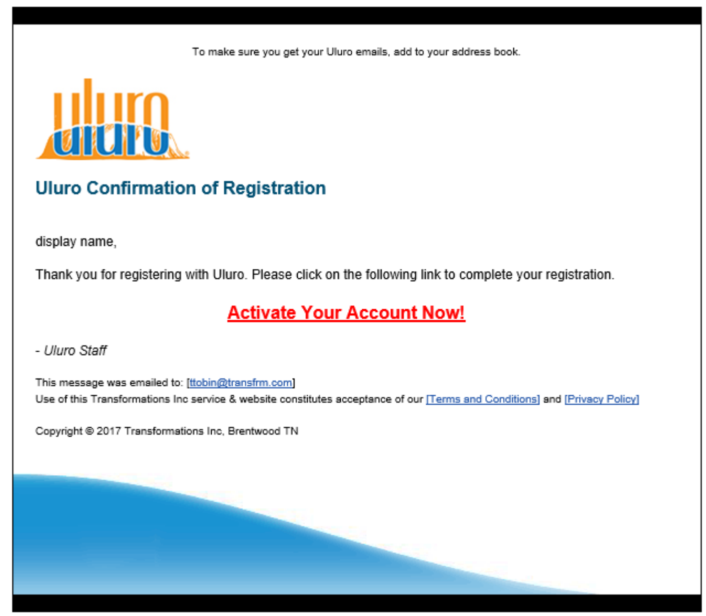
Tips from Transformations:

The Register/Reset Password emails are automatically enabled and there is a default email. The enrollment/unenrollment emails can be enabled or disabled. They are both blank by default and must be created.

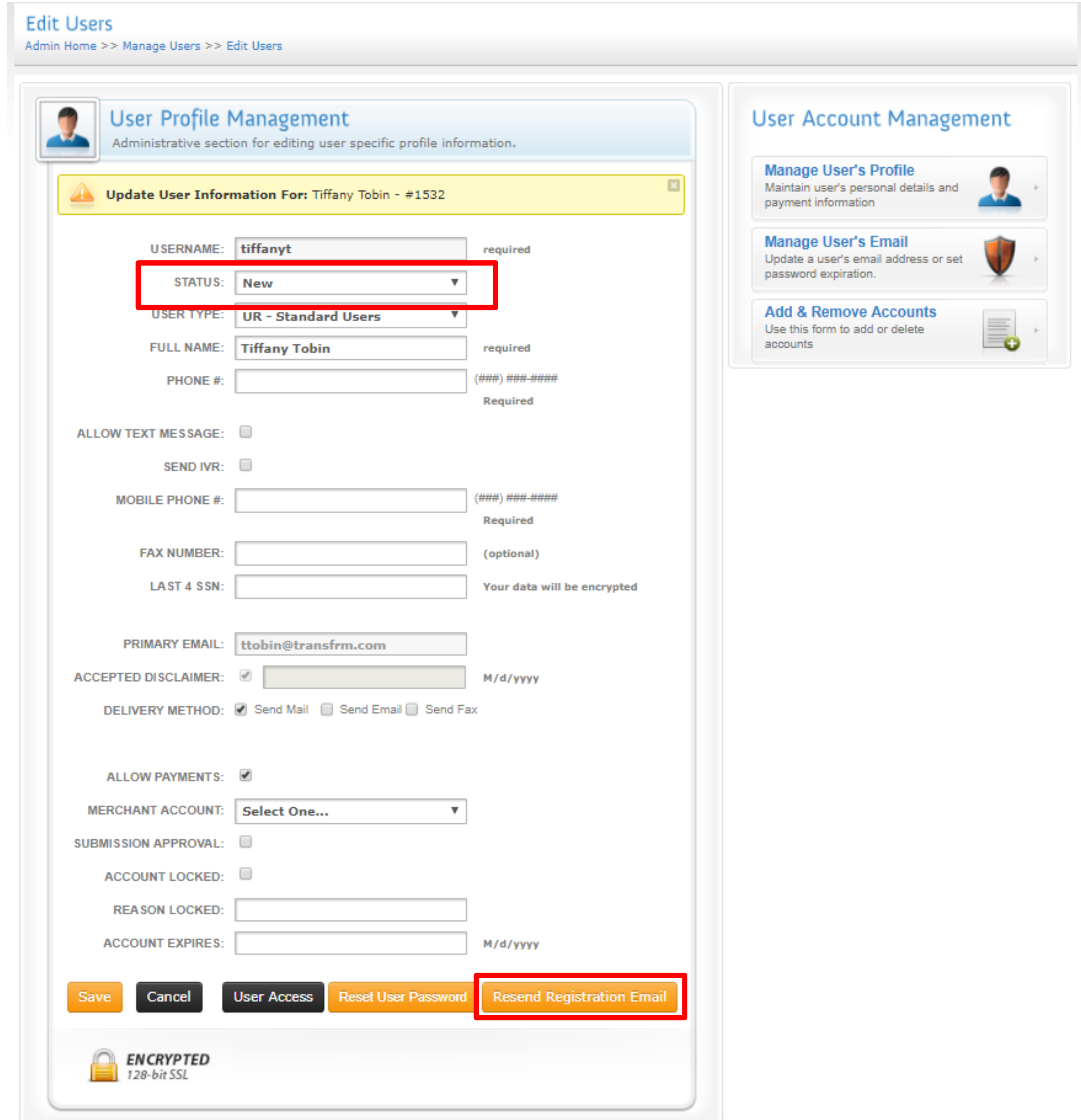
Register

This email will be sent to a user that has used the default self-registration page to register. The user will be in New status until the activation link is clicked and the user logs into the site. Once the user logs in successfully, the user will be listed as Active status and no longer be in New status.





If the registration email to activate the account expires, an admin user can resend the email. Under manage users, select user. The **Resend Registration Email** button will only appear here if a Register email has been sent and the user is still in New-N status, meaning their account is ot active yet; they have not completed the registration process.



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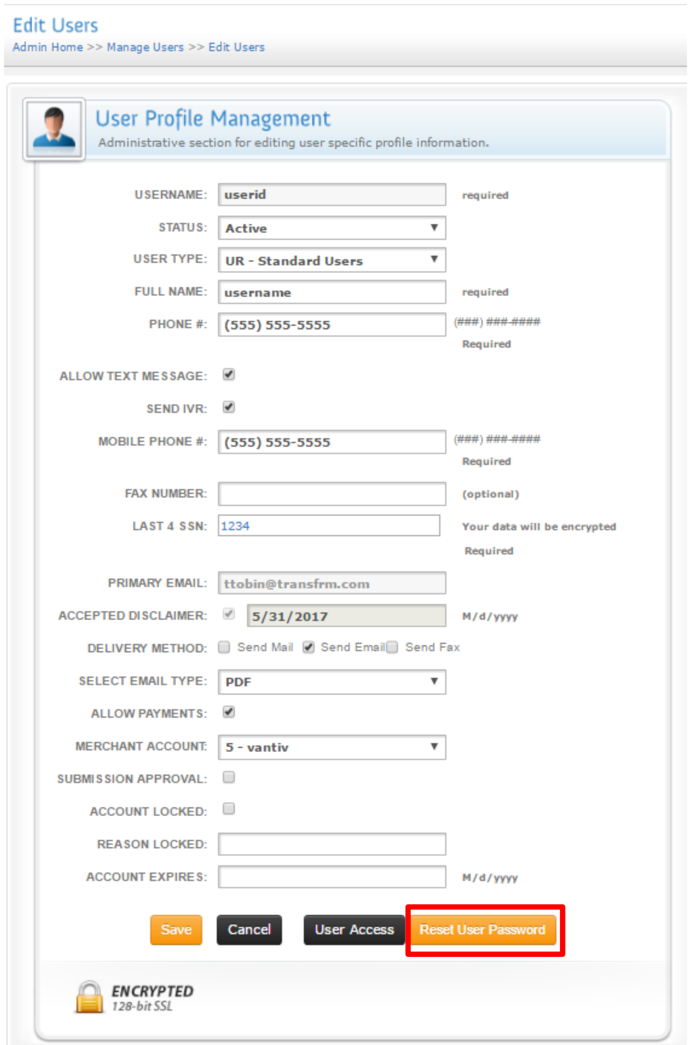
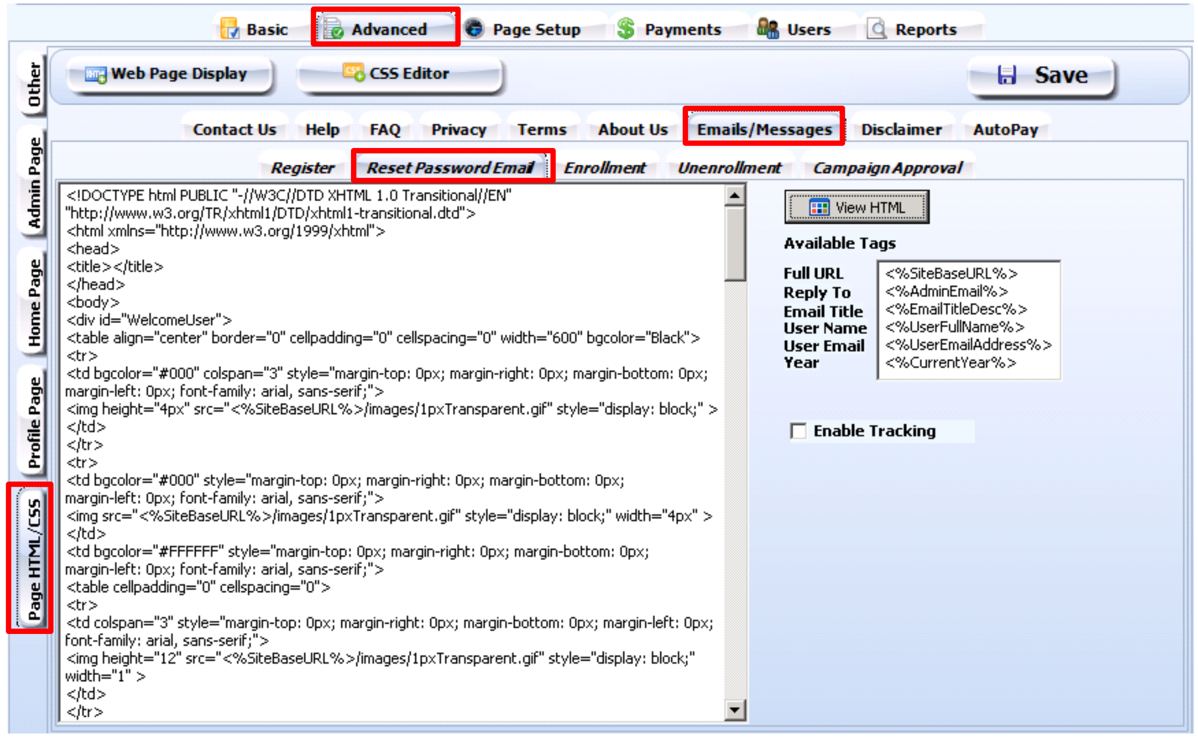
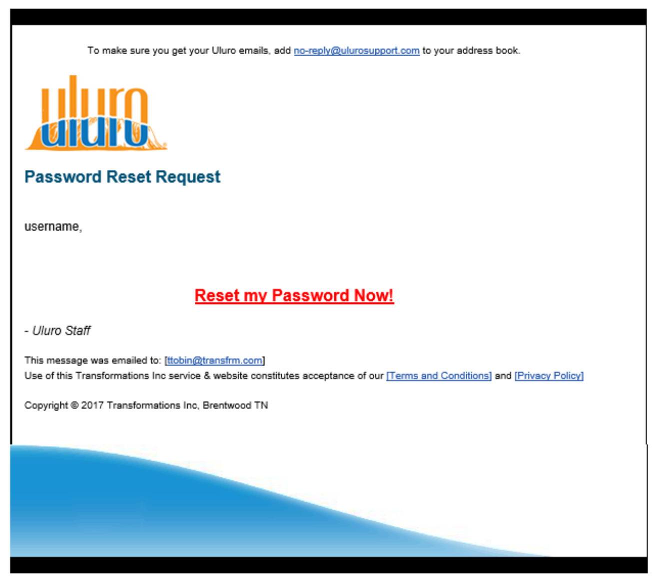
Reset Password

This email is sent to a user if the user clicks Forgot Password and the New Password Verification is not enabled. It is also sent if an admin manually goes to the user under Manage Users and clicks the Reset User Password button. The user can use the link in the email to reset their password.

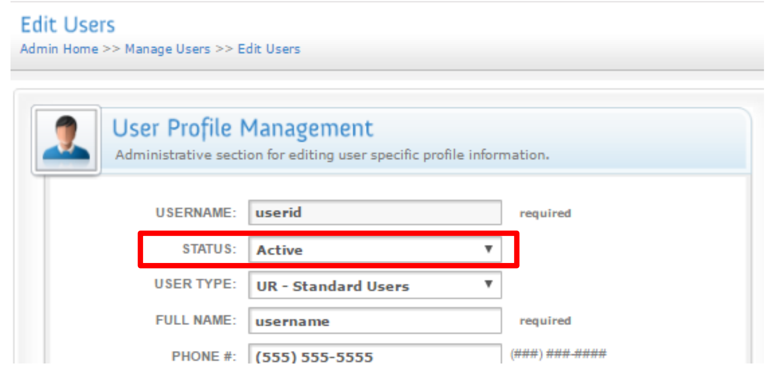






Enrollment

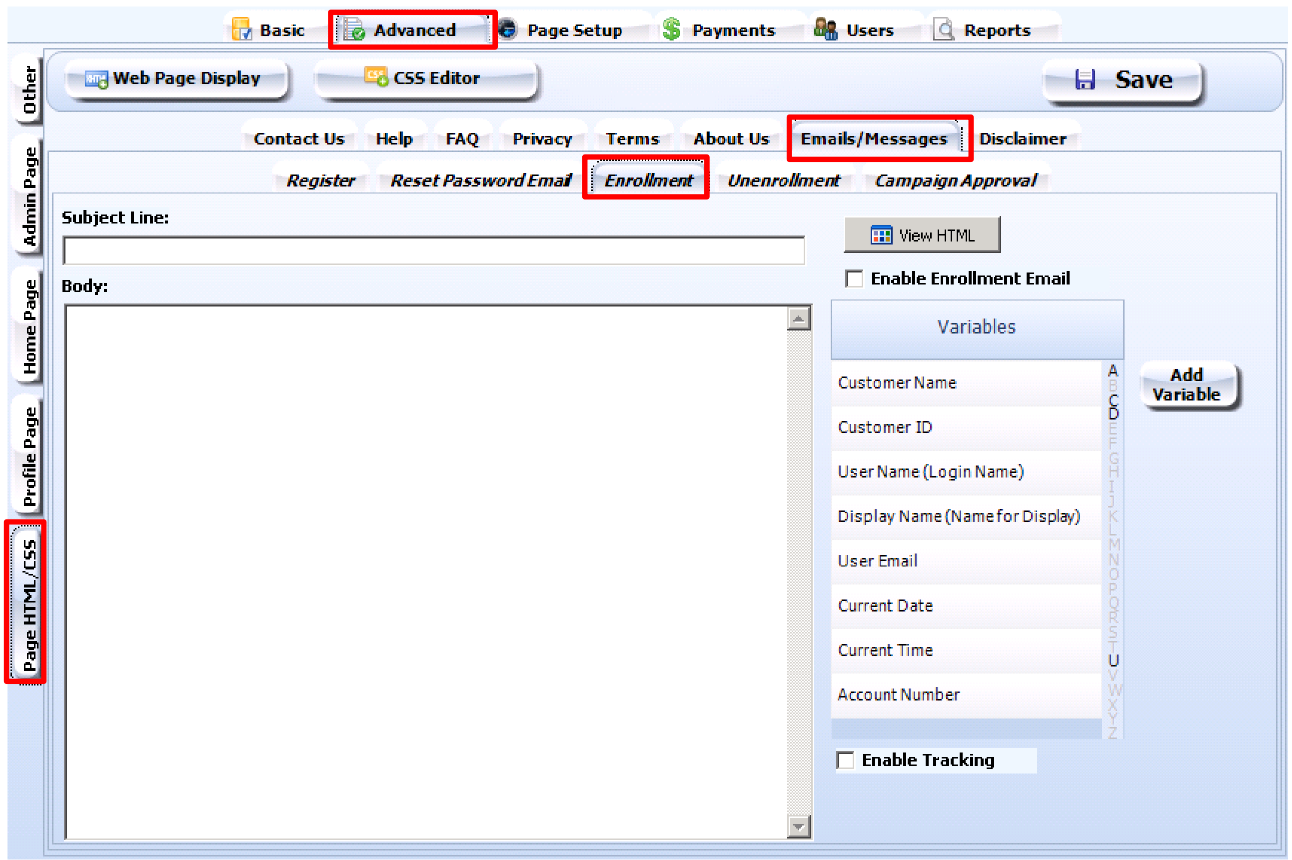
This email is sent to users when their status changes to Active in certain scenarios.



This can happen manually be an admin user by selecting a user under Manage Users. Changing the status under the profile maintenance of that user to Active will trigger this email.

This email will also get triggered once a new web user completes self-registration using the default registration page.

This email is not triggered to be sent to imported users or users self-registering using the New Registration even though both types of users will be created into Active status. There is an email sent to imported users within the import if desired. The keys were designed to function as the email confirmation piece in New Registration.



Customize the email, and click the **View HTML** button to preview the email. You can add variable tags throughout the email.

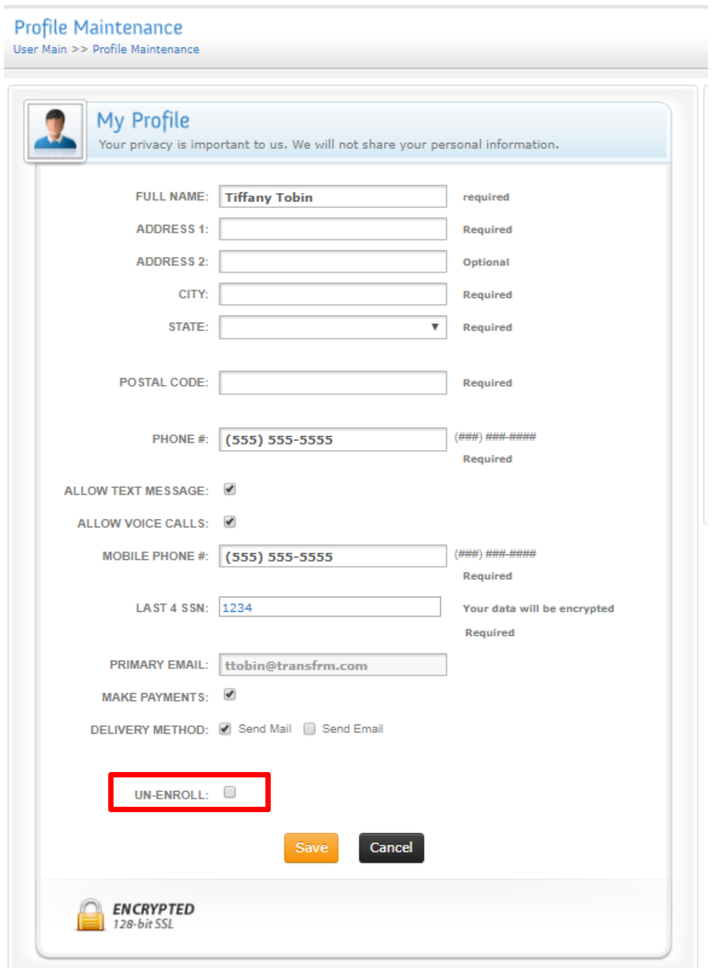
If you are using Mandrill to track emails, check the **Enable Tracking** box on any of these emails to have track the emails that are sent.

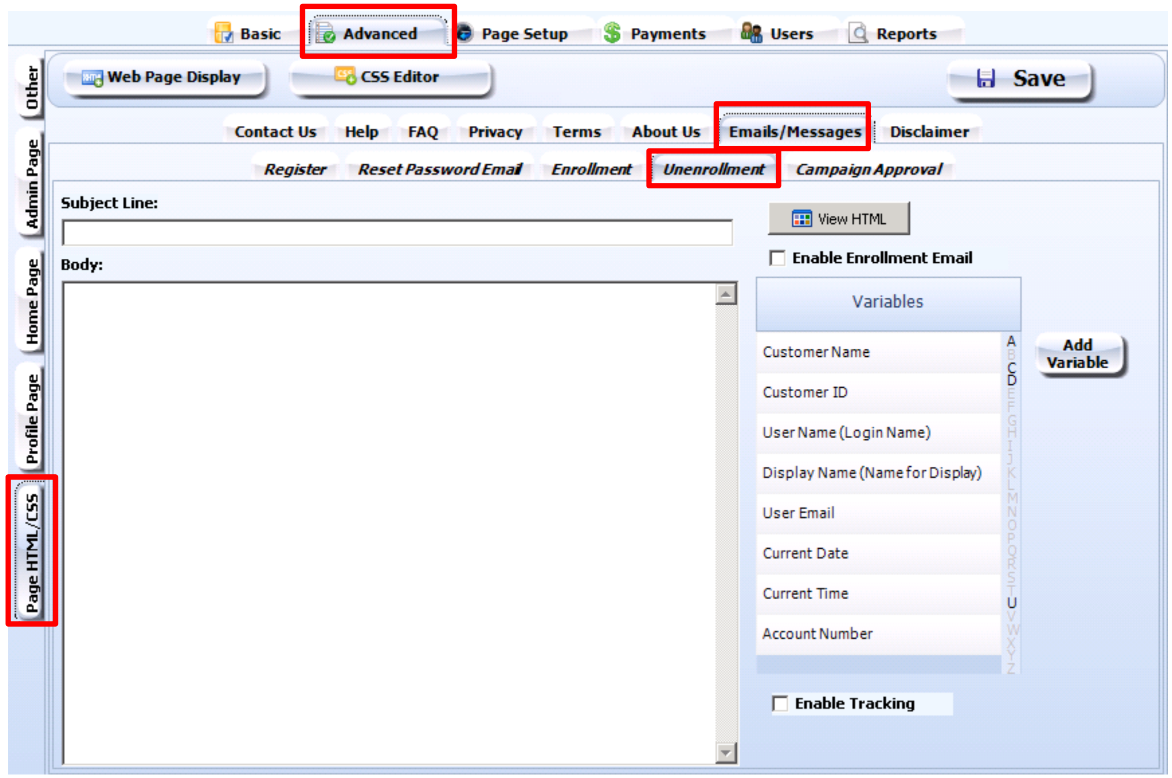
This email must be enabled by chekcing the **Enable Enrollment Email** checkbox or it will not be sent.

Unenrollment

This email is triggered by an end user that checks the UN-ENROLL box within their profile maintenance.

Customize the email, and click the **View HTML** button to preview the email.





You can add variable tags throughout the email. Select the varible from the list and click the **Add Variable** button and the tag will be inserted in the text of the subject line or body or the email.

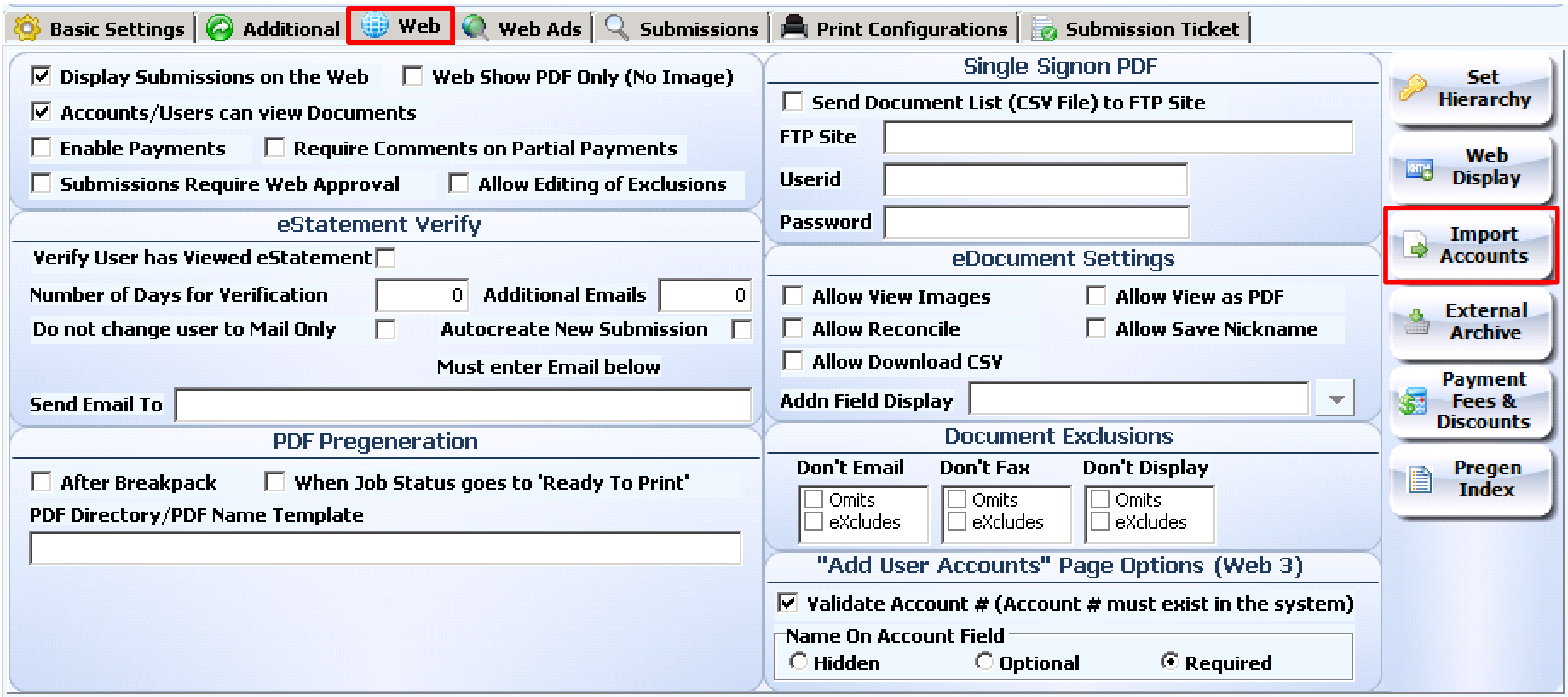
If you are using Mandrill to track emails, check the **Enable Tracking** box on any of these emails to have track the emails that are sent.

This email must be enabled by chekcing the **Enable Enrollment Email** checkbox or it will not be sent.

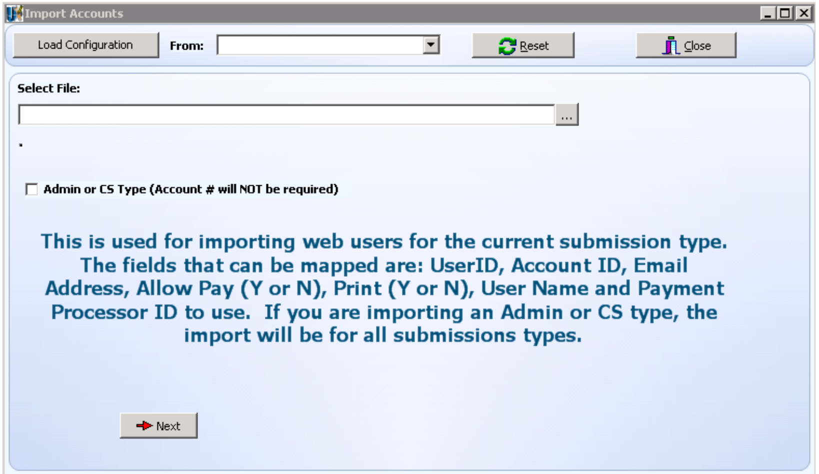
Import Web Users

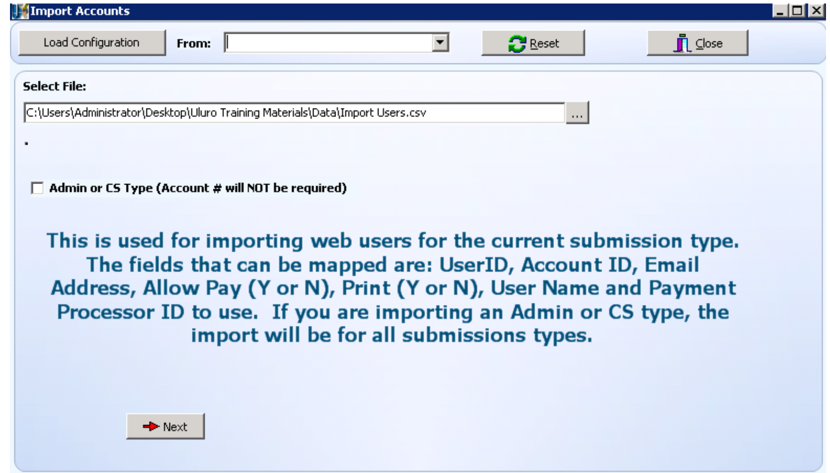
This allows you to import web user accounts into Uluro from an outisde portal. It prevents users from having to enroll in a new portal. This is done at a submission level, not at the site (client) level.

To import accounts for a submission type, go to the submission type in uSetup. Select the web tab. On the right hand side, click the Import Accounts button.

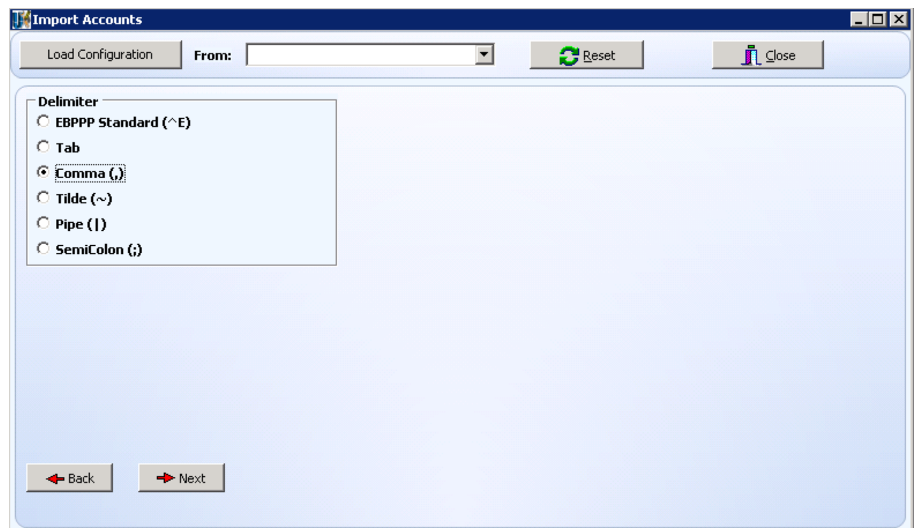


Once you've confirmed you wish to import accounts for this submission type, this screen will appear:





If you have previously saved a configuration you can select I using the From dropdown. Then click the Load configuration button. This will load your settings from the saved configuration so that each screen will have those settings. You can edit them as necessary or simply click through each screen to import the file without having to reenter any settings.



If you select a configuration and load it at any point during the import, you will be brought to this main screen and can then proceed using the configuration settings.

Select a file to import.

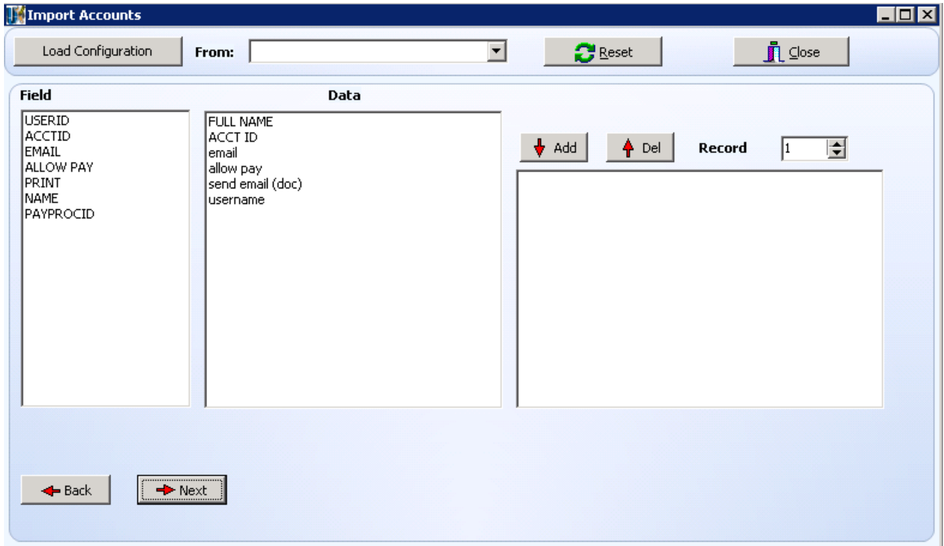
If the file consists of admin or CSR users check the Admin or CS box. This will allow you to skip over selecting the AcctID field later during the import since these users do not hve account numbers.

Click Next.

Select the delimiter of the file you are importing. You can only import web users using a delimited data file.

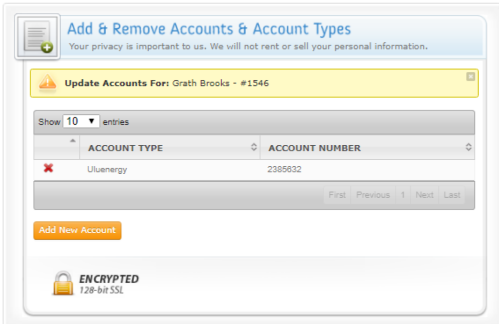
Click Next.

Only these 7 fields can be imported for a web user:



- UserID – username for logging into the site. You will not be able to import users if this is not unique. Multiple users can have access to the same account number, but their userIDs must be unique. If not, the import will error when you validate the data. This field will be stored as the username/UserID.

- AcctID – Account number linked to the user. The user will be able to view documents containing this account number. This will be viewable under the acocunts for that user.



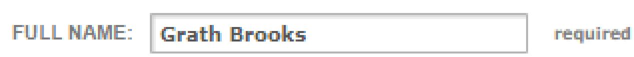
UserID, AcctID, and Email are required.

- Email – Email address – Stored as the primary email address on the user's account in their profile.

- Allow Pay – This identifies if payments are allowed for that user; Y this will check the Allow Payments box in the user's profile.

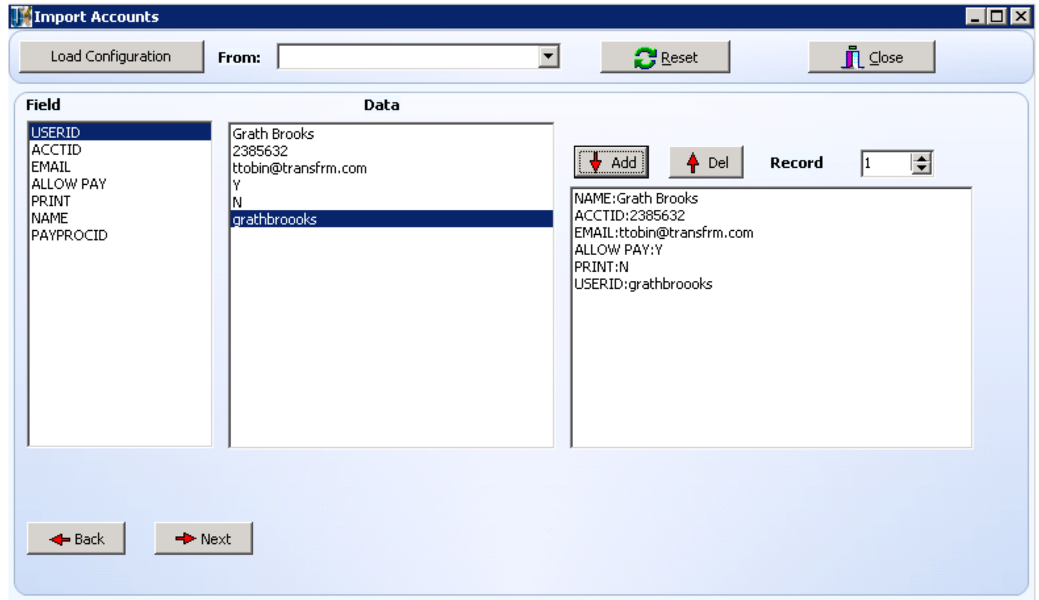
- Print – This identifies if the user will receive printed statements. This is stored as the delivery method in the user's profile. Send Mail will be checked if Y is the field in the data.

- Name – Name on the account. This will be stored as the Full Name in the user's profile.



- PayProcID – The ID of the payment processor. The data file only needs to contain the number. Forexample, 5 if the payment processor desired is Vantiv. This field is only displayed when an admin edits a user.

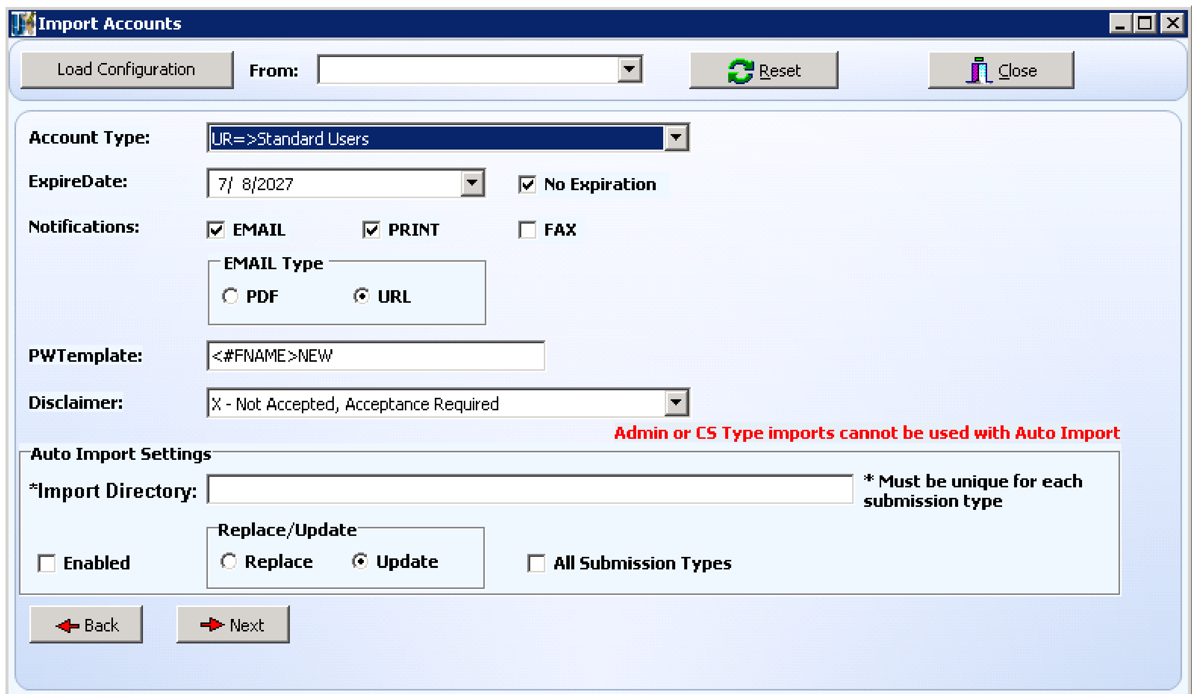
Select the field to match each data item, clicking the Add button for each to see them on the right. Select the item and click the Delete button to remove that match.



Less than 7 fields can be imported, but no additional fields can be imported.

Use the arrows, or enter the record number to see each user's record and what will be imported for each field.

Click Next.



Account Type – Select the type of users being imported.

You must import each account type using separate data files. You cannot import a data file containing admin and standard users.

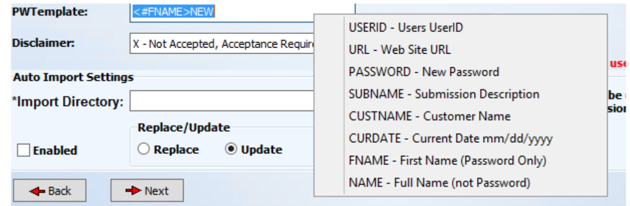
This will display any user types available for this site. The users will be assigned the landing page and permissions associated with that user type.

Expire Date – Enter a date for the account to expire. This will be displayed for an admin to view under Manage Users on the admin home page of the site as well as under the Users tab in web setup.

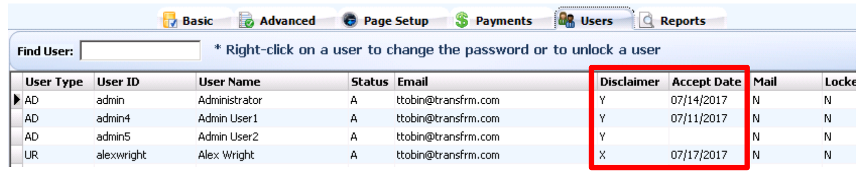
Notifications – This will be how a user receives their documents. If email is checked, the email type of PDF or URL will also have to be selected.

PW Template – When the user is created, this will be the password they use to login. The password can be literal text along with variables that will be populated from the data.

<#PASSWORD> will randomly generate an alphanumeric string.



Disclaimer – Select if the disclaimer has already been accepted on the previous site and whether you wish to require it at this time. When the disclaimer is accepted, it will be logged in the user's profile. It is also logged under the Users tab in Web Setup.



Click Next.

If you want to send the imported users an email, check the Send Email After Import box and enter in the subject and body of the email.

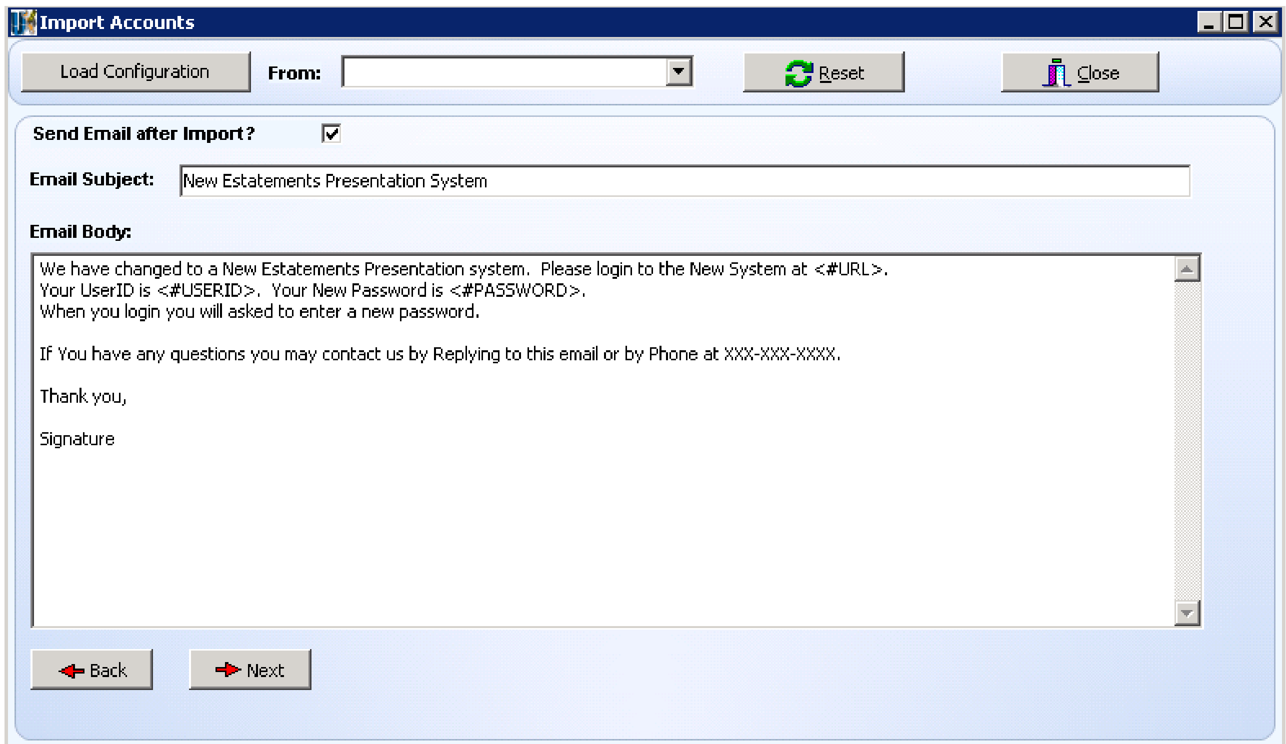
This is the only email that will be sent to an imported user, if you do not send this, they will not be notified. The user imported will be in Active status.

Edit the email subject and body as desired.

Tips from Transformations:

Include the UserID, new password, and URL so users will be able to login and know the new site.

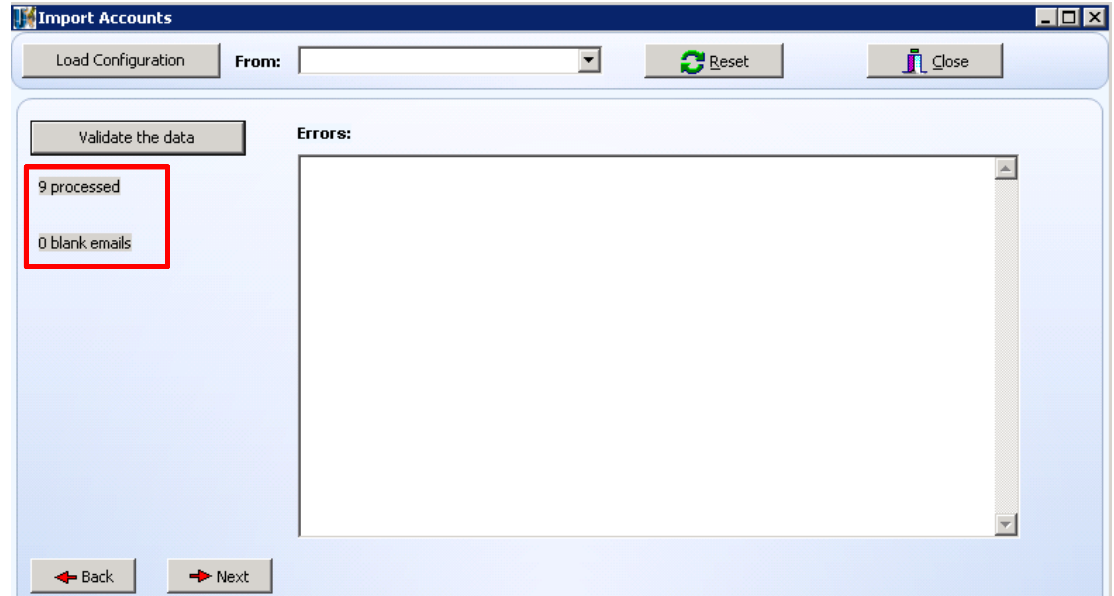
Click Next.



Click the Validate the data button. It will show the number of records validated. If any errors occurred, those will be displayed in the Errors box.

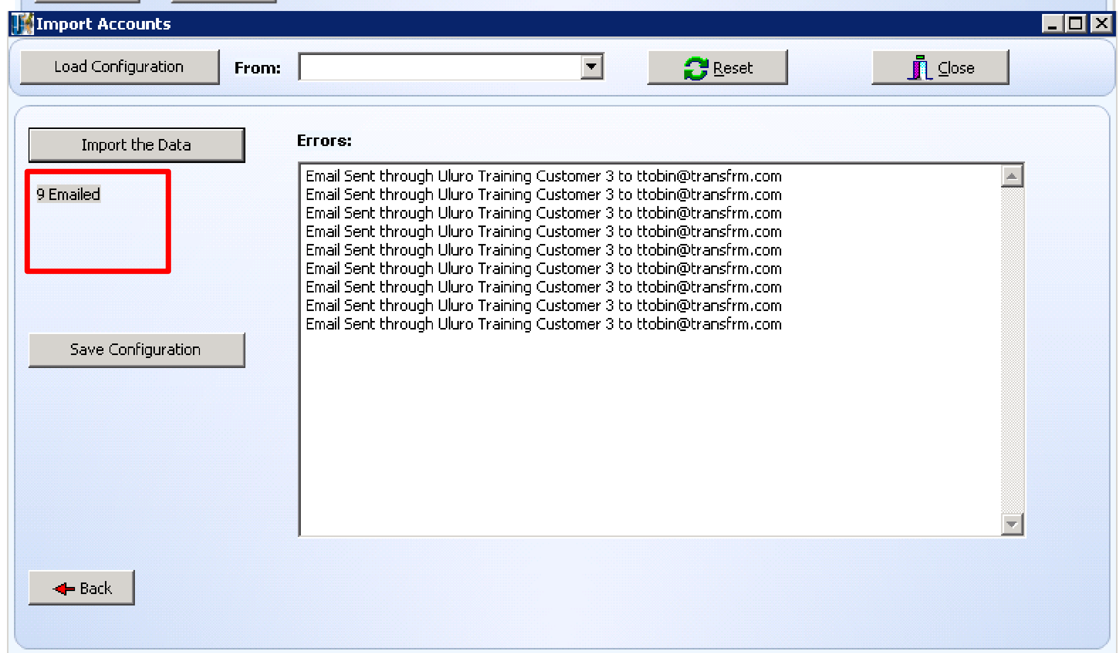
If errors have occurred, the errors will have to be resolved, and the data file with the adjustments will need to be imported.

If there are no errors, click Next

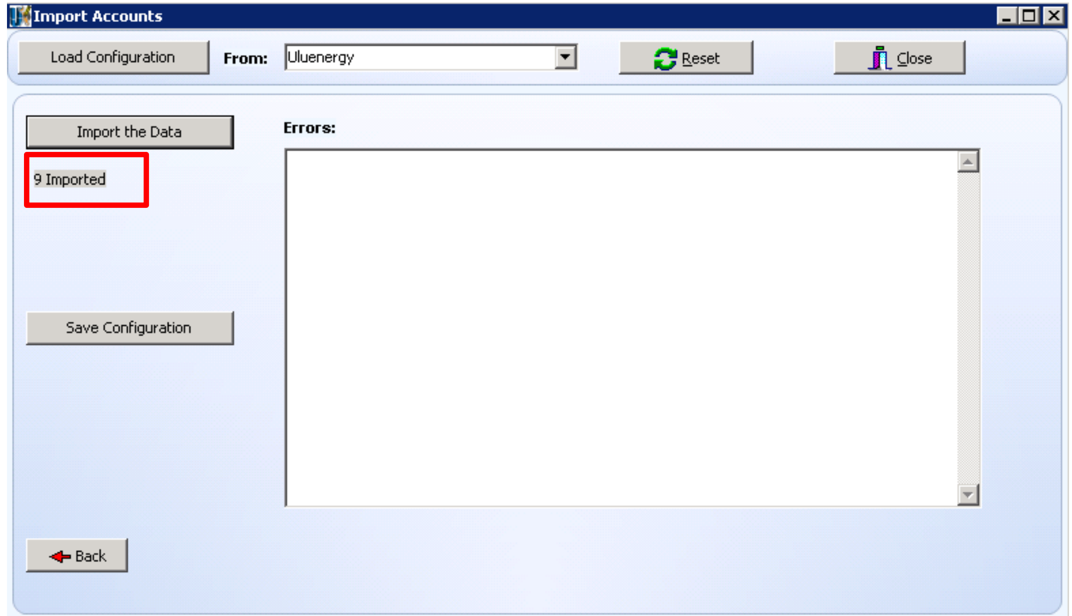


Click the Import the Data button.

It will ask you to confirm the import and the emails to be sent if the send emails after import box was previously checked.



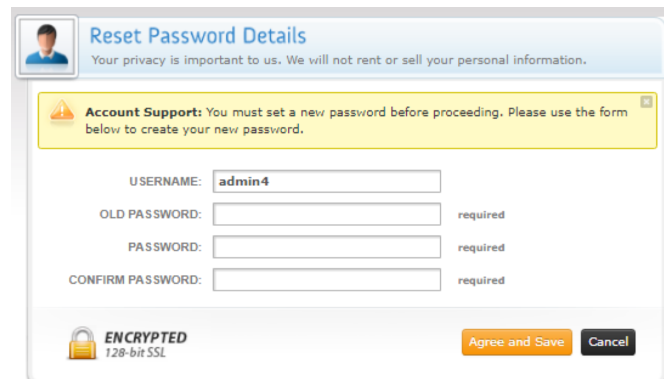
If you don't send the emails, it will display that the records were imported.



At this point save the configuration by clicking the Save Configuration button, or exit, the import is complete. The configuration is saved at a Submission level. You can only save one configuration per subm type. If you edit a configuration and save at the end of the import, the new settings will be the configuration. It will override the previous configuration for that submission type.

The reset button takes you back to the initial import screen.

The close button leaves the import.

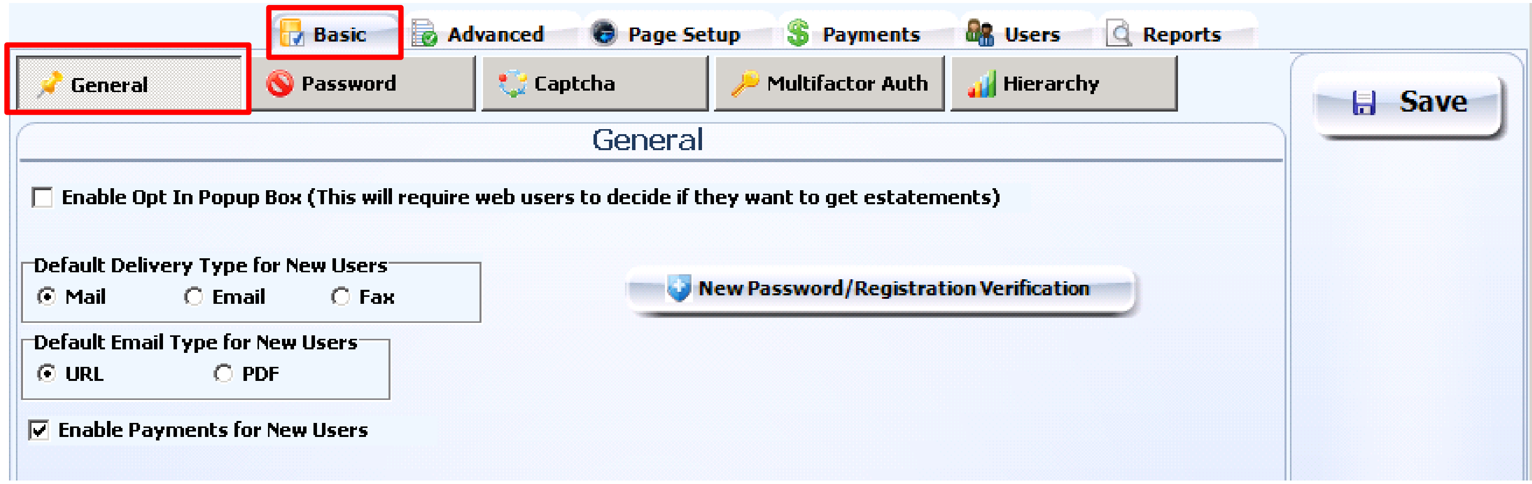


If the email is sent, and users go to the site to log in with the temporary password, they will be directed to reset their password with a password of their choice.

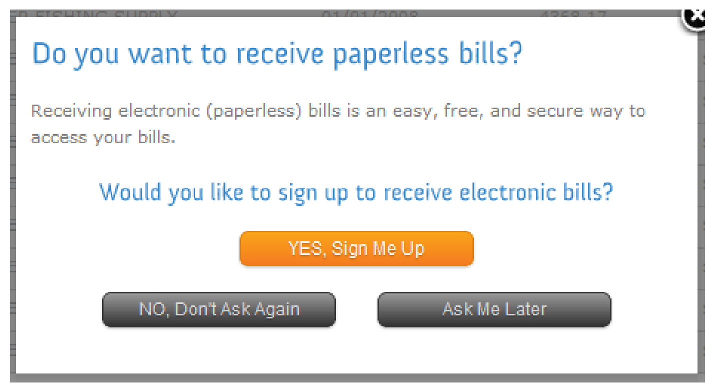
Once they click Agree and Save, they will be directed back to the main page of the site to login using their new password.

Basic tab (General)

GENERAL MENU



This screen has some default settings for user delivery methods.



Enable Opt In Popup Box – If this is checked, a user that has Send Mail as a delievery option checked will have this screen displayed upon logging into the site.

Yes, Sign Me Up – This will change the user to have a preference of receiving bills via email. The user will receive the Send End User URL Email Event (which needs to be setup within the submission type).

No, Don't Ask Again – The user's delivery methid will remain mail.

Ask Me Later – The user will hve this popup box appear next time the user logs into the site.

Default Delivery Type for New Users – For a new user, this will be the Delivery Method selected for that user on their profile. If email is selected, it will apply the default email type as well.

Default Email Type for New Users – If Email is the delivery type, URL or PDF must be selected here. This preference will be saved on the new user's profile under select email type.

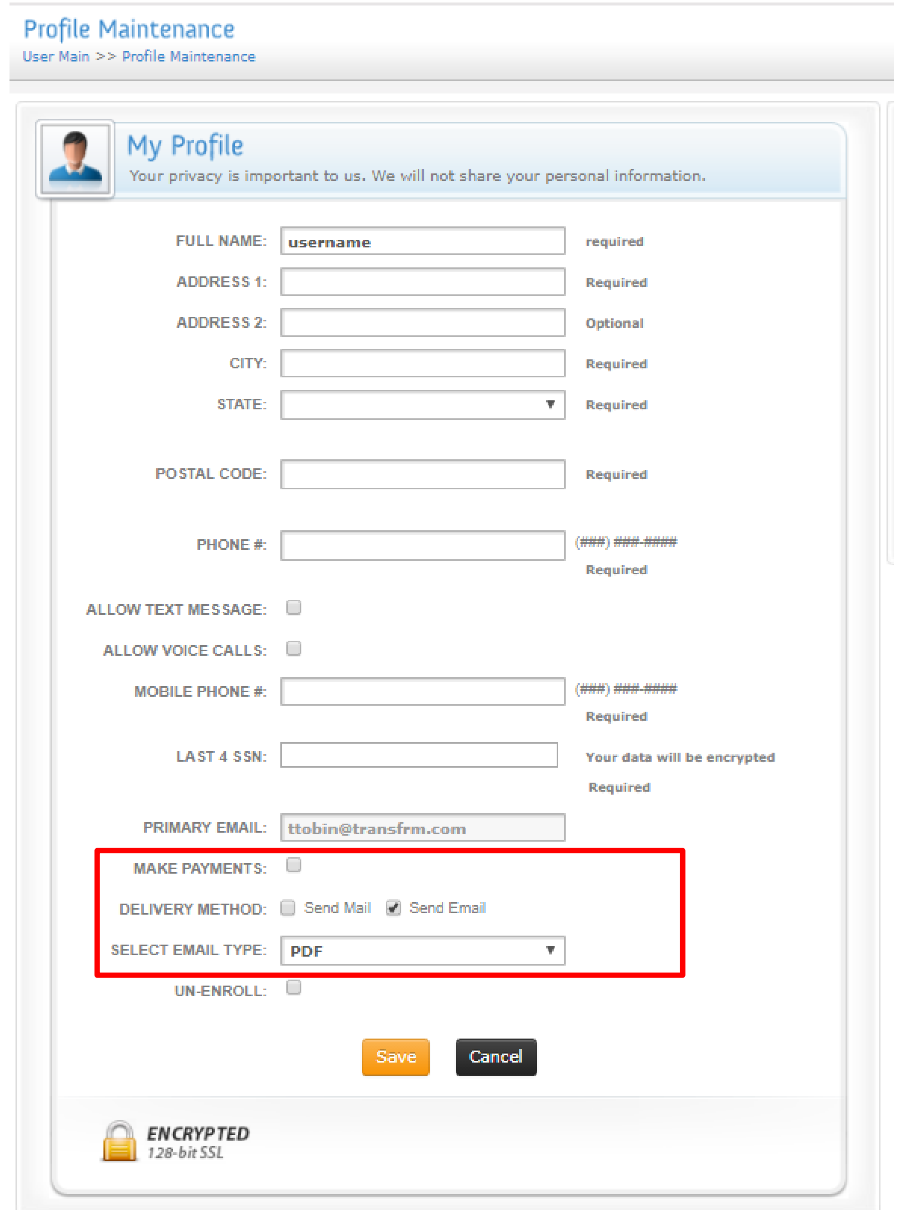
URL – An email with a URL link will be sent to the user to view their statement. See Send End User URL Email event for how to set up this email.

PDF – An email with an attached PDF of the user's statement will be sent to the user. Send End User PDF Email event for how to set up this email.

Tips from Transformations:

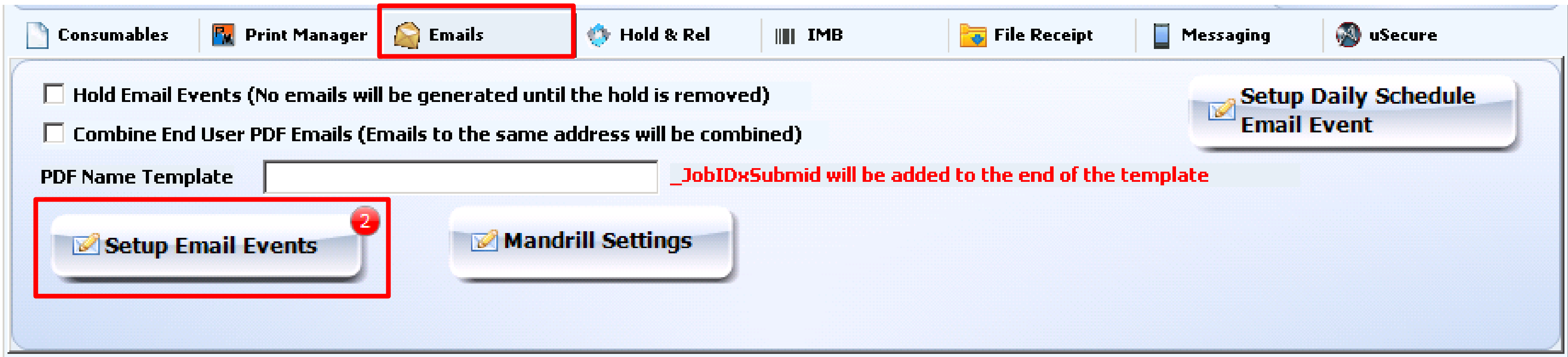
All of these settings can be edited by the user within their profile maintenance at any time.

Enable Payments for New Users – If this is checked, the user will have the ability to make payments. The Make Payments box will be checked as a result on the user's profile.



Send End User PDF/URL Emails

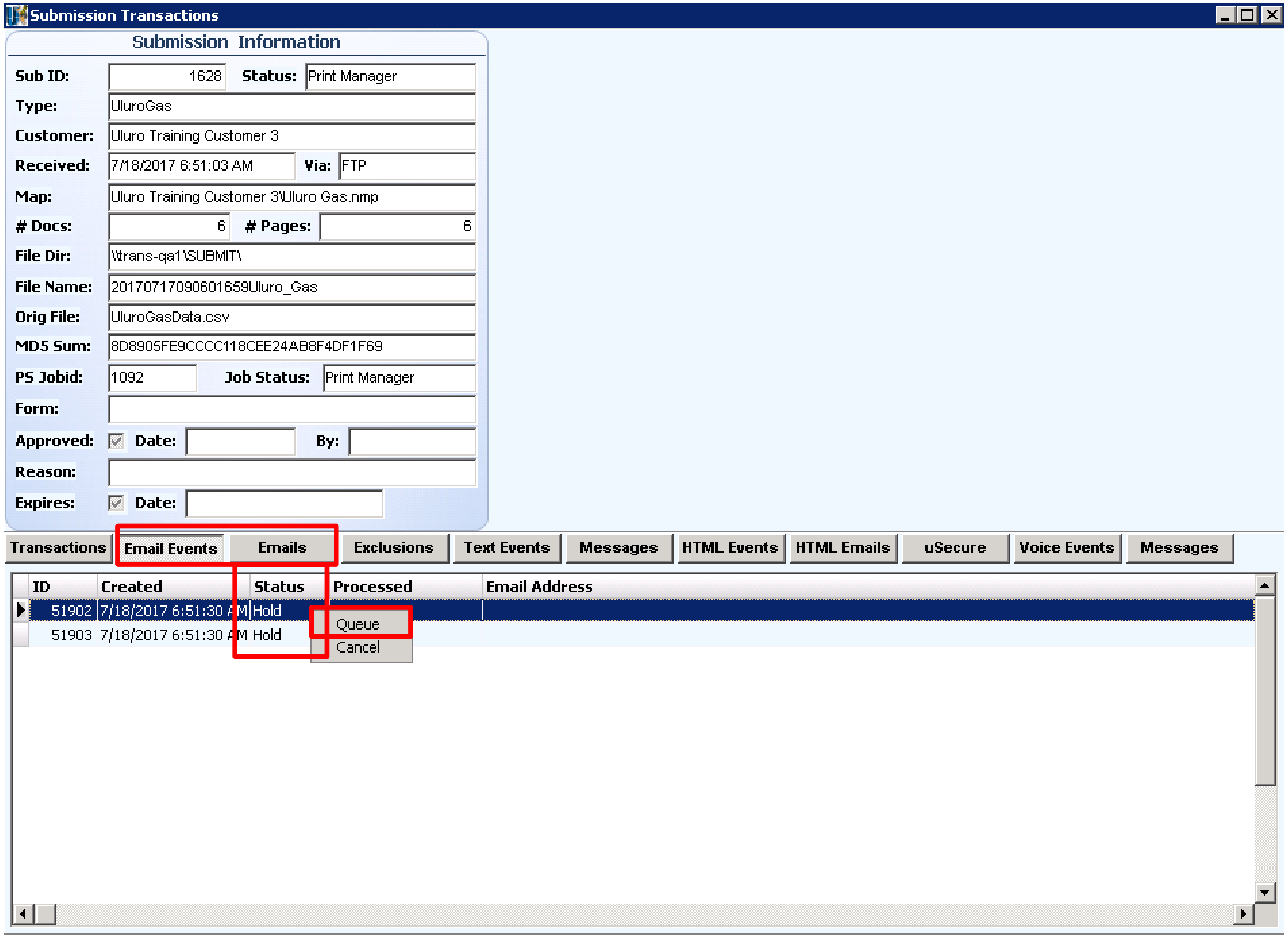
Both email events are setup and enabled at a submission level. Within any submission type, go to the emails tab under Basic Settings.



Click on Setup Email Events to setup the end user emails for e-statements.

The number displayed in the red circle are the number of email events that have been created for the submission type.

Hold Email Events – If this is checked, the Email Event will be created, but no emails will be generated until the email event is Queued. Go to the submission tab within a submission type. Double click on the submission to see more detailed information about that submission. You will see the email event under the Email Event tab at the bottom. The email tab will have no information at the moment since the event is in Hold status currently. To Queue the event, right click and select Queue. The status will change to Queued and the emails will then be created and sent. At that point, the emails will be listed under the Emails tab. (Email events can be Queued this way in uSetup or in uDashboard, but not in uControl).



Combine End User PDF Emails – If this is checked and there are multiple web users that have the same email address on their account, the PDFs will be combined into one PDF and one email. The combined PDF containing all of the statements will follow the naming structure of Combined_submIDx yymmddhhmmss.pdf. If this is unchecked, the PDF emails will be sent individually per document and the attached PDF will contain only one statement and follow the naming structure of _submID x docno.pdf

PDF Name Template – This can be used to adjust the name of the PDF. Anything can be entered here but _submID x docno.pdf will follow the text entered in this field. This field will only be used if the PDFs are not being combined. The naming structure for the combined PDFs will always be Combined_submIDx yymmddhhmmss.pdf.

Tips from Transformations:

If the field Sys_EmailAddress has a value, it will override the email address(es) from the web profle.

For the Send End User URL Email to contain a link, you will have to put the link in the body of the email.

To create a new email event, click the new button.

Event – Select the type of email event. For e-statements, select Send End User PDF Email or Send End User URL Email.

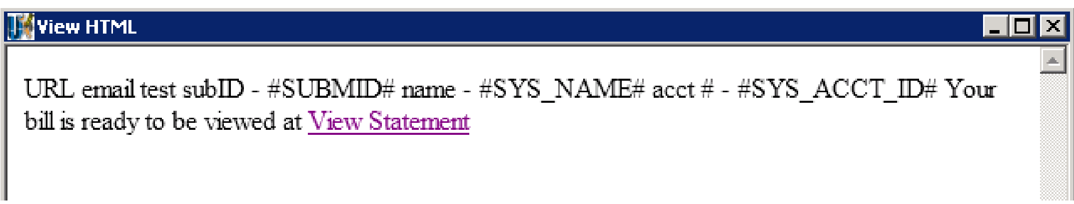
To Email Addresses – The Email Address is pulled from the web users profile, so this is grayed out. These two type of email events will be generated and triggered from the profile settings of web users. When a submission is run, the web users with delivery type of email will receive one of these two emails, if they have been setup. Those with email as a delivery type and PDF as the method will receive Send End User PDF Emails. Those with email as a delivery type and URL as the method will receive Send End User URL Emails.

Subject – Enter the text that will be displayed as the subject line of the email.

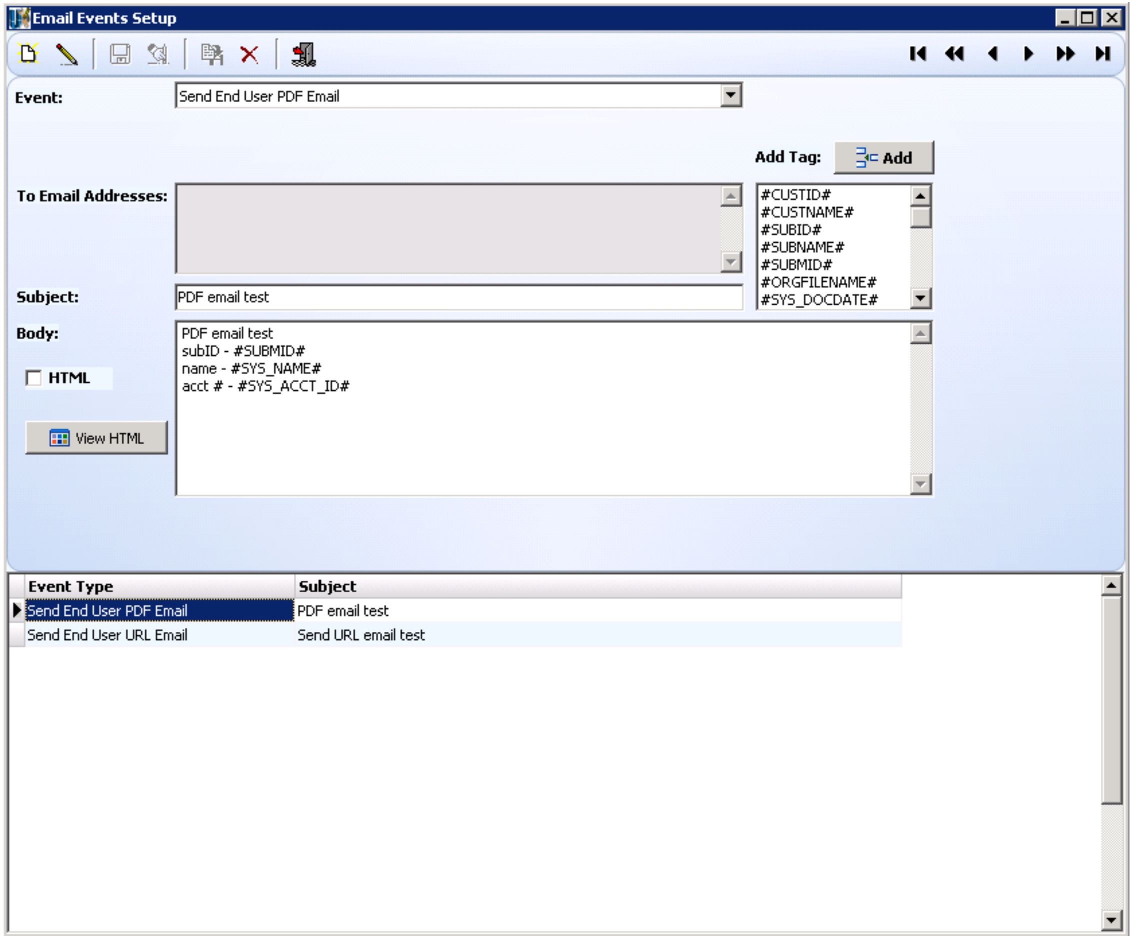
Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML** box.

Click the **View HTML** button to preview the email.

Tags – These can be added to the subject line, or the body or the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.



Sample Setup:



Combine Emails

Enable – If this is checked, combined URL emails are enabled. If this is checked, and Combine body is unchecked, the emails will be combined into one email per unique group of email address(es).

Combine Body – If this is checked, Enable must also be checked for this to take effect. This setting combines the body of all the emails that would be sent to that unique group of email address(es) into one body displaying each of the bodies.

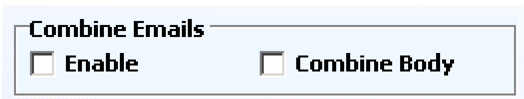
Tips from Transformations:

The emails are sent per group of unique email addresses. If multiple users have the same primary email address on their profile for example, but a different email listed under additional emails, those users will not receive combined URL/PDF emails.

If two users have the sme primary and/or additional emails then they will receive combined emails per unique grouping.

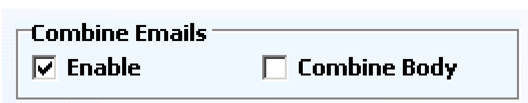
In the examples all 5 users have ttobin@transfrm.com as the primary email. One of those users (Clarence) has a different email listed as an additional email on the account.

Setting



Result – Emails sent to the (5) users individually per email address. Here is a sample of one of the emails:

Setting



Result – One email is sent to each group of email addresses. For example, 4 users had ttobin@transfrm.com as the primary email and only one email was sent. The email will not list the body that would go to each user. It uses one body instead of showing all of them.

To ttobin@transfrm.com; tiffanymtobin@gmail.com

URL email test subID - 1631 name - Clarence Acuna acct # - 269275 Your bill is ready to be viewed at View Statement

Setting

Combine Emails

☑ **Enable** ☑ **Combine Body**

Result – One email is sent to each group of email addresses. For example, 4 users had ttobin@transfrm.com *as the primary email and only one email was sent. The email will list EVERY body that would go to each user.*

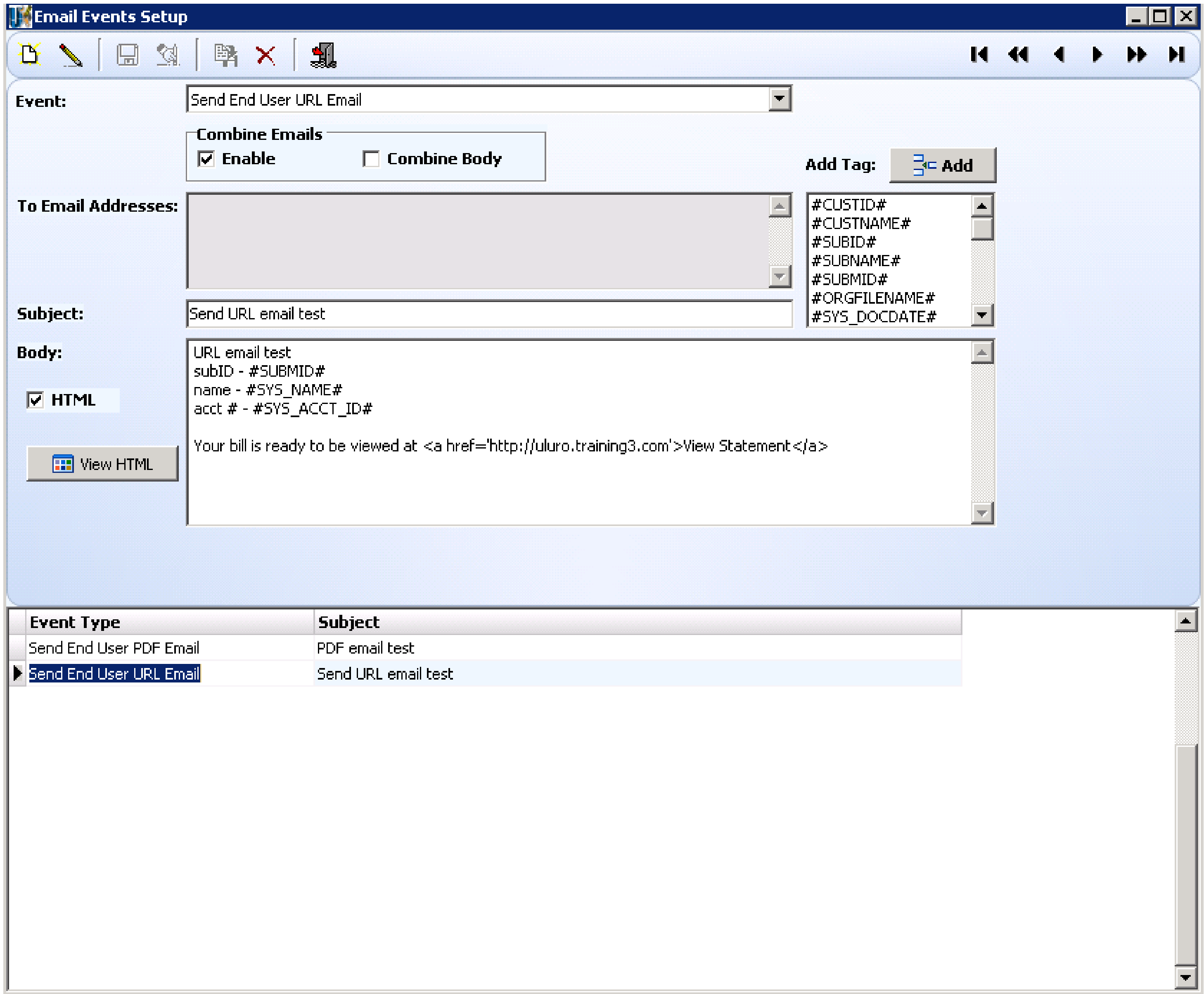
To ttobin@transfrm.com; tiffanymtobin@gmail.com

URL email test subID - 1630 name - Clarence Acuna acct # - 269275 Your bill is ready to be viewed at View Statement

To ttobin@transfrm.com

URL email test subID - 1630 name - Matthew Aaron acct # - 71698 Your bill is ready to be viewed at View Statement
URL email test subID - 1630 name - Alex Wright acct # - 71701 Your bill is ready to be viewed at View Statement
URL email test subID - 1630 name - Tiffany Tobin acct # - 1010123456789 Your bill is ready to be viewed at View Statement
URL email test subID - 1630 name - Brionna Abernathy acct # - 71705 Your bill is ready to be viewed at View Statement

Sample Setup:



Submission Email Report

This also includes a submission email report that will be created if a submission has Combine Emails enabled and the combine has been run. You can find the report with the other reports. It will have an extension of .seml.pdf.

Below is an example.

Submission Email Report **8/28/2014 3:45:20 PM**

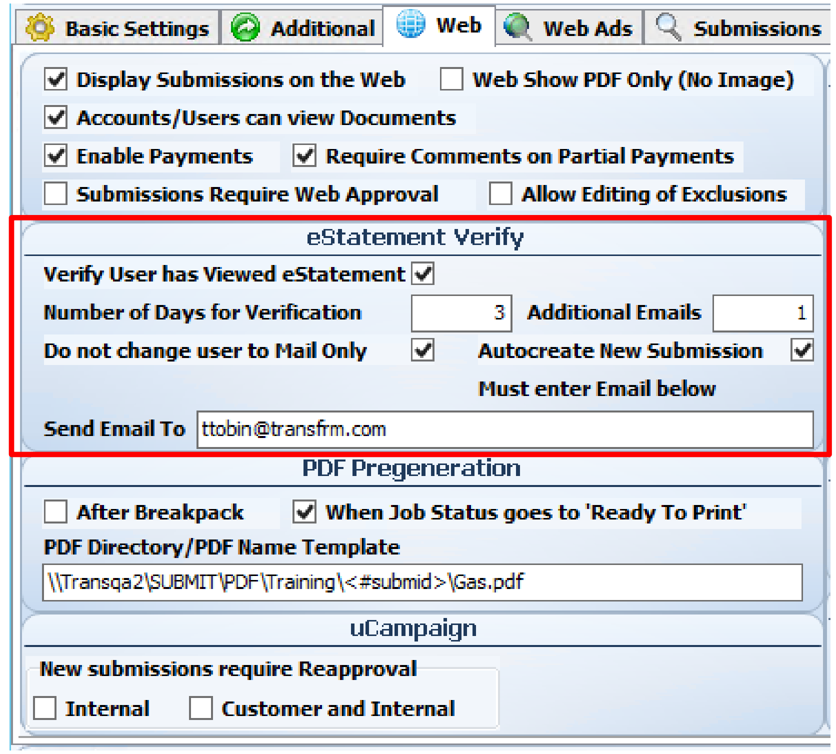
Original Submission File: bd2 **Process Date:**
Submission ID: 134995
Client: Transformations Inc **Submitter ID:** BankLetter Uluro National Bank

Acct ID	Acct Name	Email Address	Combined
366-5	Mr Jeff Abdullah	alligator3@cm.com	1
366-5	Fr Arianna Bailey	alligator3@cm.com	
34-9	Mr Matthew Aaron	[redacted]@transfrm.com	1
479-6	Mr Ricardo Balaam	[redacted]@transfrm.com	1
479-6	Mr Ralph Adee	[redacted]@transfrm.com	
517-3	Miss Lyric Alberto Februaris	[redacted]@transfrm.com	1
521-5	Ms Jenifer Alberto Februaris	[redacted]@transfrm.com	
537-1	Ms Mckenna Albright	[redacted]@transfrm.com	
728-6	Miss Keeley Avarello	[redacted]@transfrm.com	
517-3	Mr Dakota Barclay	[redacted]@transfrm.com	
521-5	Ms Maanika Barman	[redacted]@transfrm.com	
537-1	Mr Damian Barnes	[redacted]@transfrm.com	
728-6	Ms Clara Blokhine	[redacted]@transfrm.com	

Total Emails - 13 **Total Combined -** 4

eStatement Verify

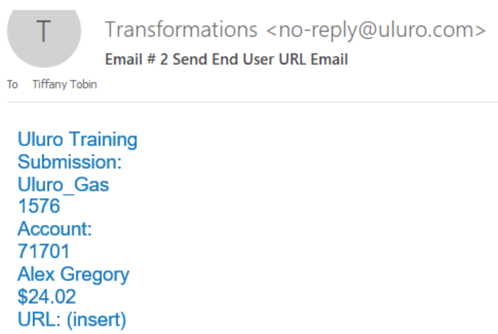
This verifies if a user has logged into the web and viewed their document. This is setup within a submission type, under the web tab. This only applies to web users that have selected Email and URL as the delivery method in their web profile. Those users will initially receive a Send End User URL Email event which must be setup within the submission type.



Verify User has Viewed eStatment – Check this to enables the functionality to verify if a user has viewed their document.

Number of Days for Verification – This is the number of days the user is given to view the document before an additional email is sent.

Number of Additional Emails – This is the number of emails to send after the initial email has been sent prior to the document being mailed. These will send on the same number of days for verification interval. Additional emails will have a number indicating a previous email has been sent. This example is the second email (first additional email).



Do not change user to Mail Only – If a user has not viewed their document on the web even after the additional emails are sent, then by default that user will be changed to Mail only unless this is checked. Email delivery will be unchecked.

Autocreate New Submisison – If this is checked, a new submission for those who have not viewed their document on the web will be created. One submission per document will be created. The submission will stop in Job Select status so that it can be put on a job with other submissions or processed to print as a single document.

Send Email To – An email will be sent to this email address if a submission is automatically created. If the autocreate new submission setting above is checked, an email must be entered.

Display Documents on the Web

Documents are enabled to view on the web portal at a submission level. Within a submission type, click on the web tab.

Display Submissions on the Web – This must be checked for documents from this submission to be viewed by an admin or CSR user in the Web Proofing, Dashboard, or Search records.

Accounts/Users can view Documents – This allows an end user to view their document if they have access to documents with that account # under that submission type.

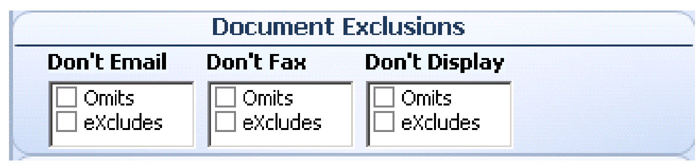
Web Show PDF Only (No Image) – turns off PNGs on the web for this submission type. Most documents generate a PNG of the document as their default way of viewing the documents (they still have a button/option to view it as a PDF as well). If this is checked the default for viewing the document becomes a PDF, nothing else. This only applies to Web Approval, not viewing the document from the Dashboard, Search page, or as an end user. This setting will only apply to the Dashboard and Web Proofing pages for the admin user.

Tips from Transformations:

Documents from submissions that have been deleted/cancelled manually or using uDelSub.exe will not be displayed on the web despite these being checked.

For archival purposes, do not delete/cancell submissions until those documents no longer need to be archived.

Document Exclusions

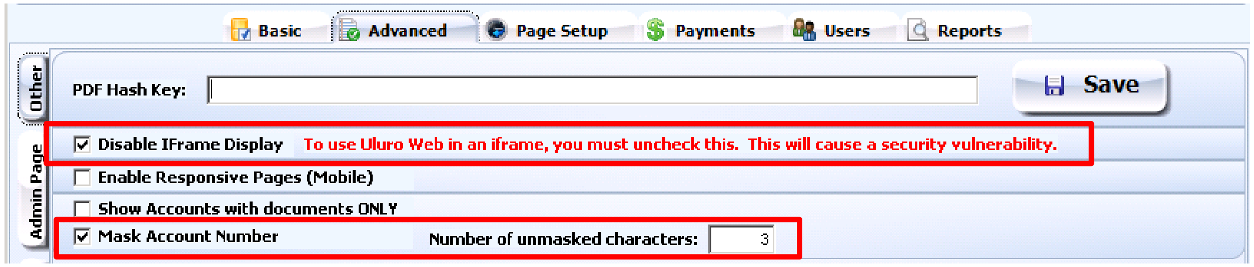


These are the behavior settings for exclusions.
For users that are receiving their documents by email/fax, if their document was marked as Omit or Exclude, then they will not receive an email/fax.
Don't Display wil not display documents marked as Omit or Exclude for Web Approval or the document list within the submission in the Web Dashboard.

Standard users will see their document on the User Main page regarless of these settings.

Disable iFrame

Disable IFrame Display – This removes the ability to view the Uluro site in an iFrame.

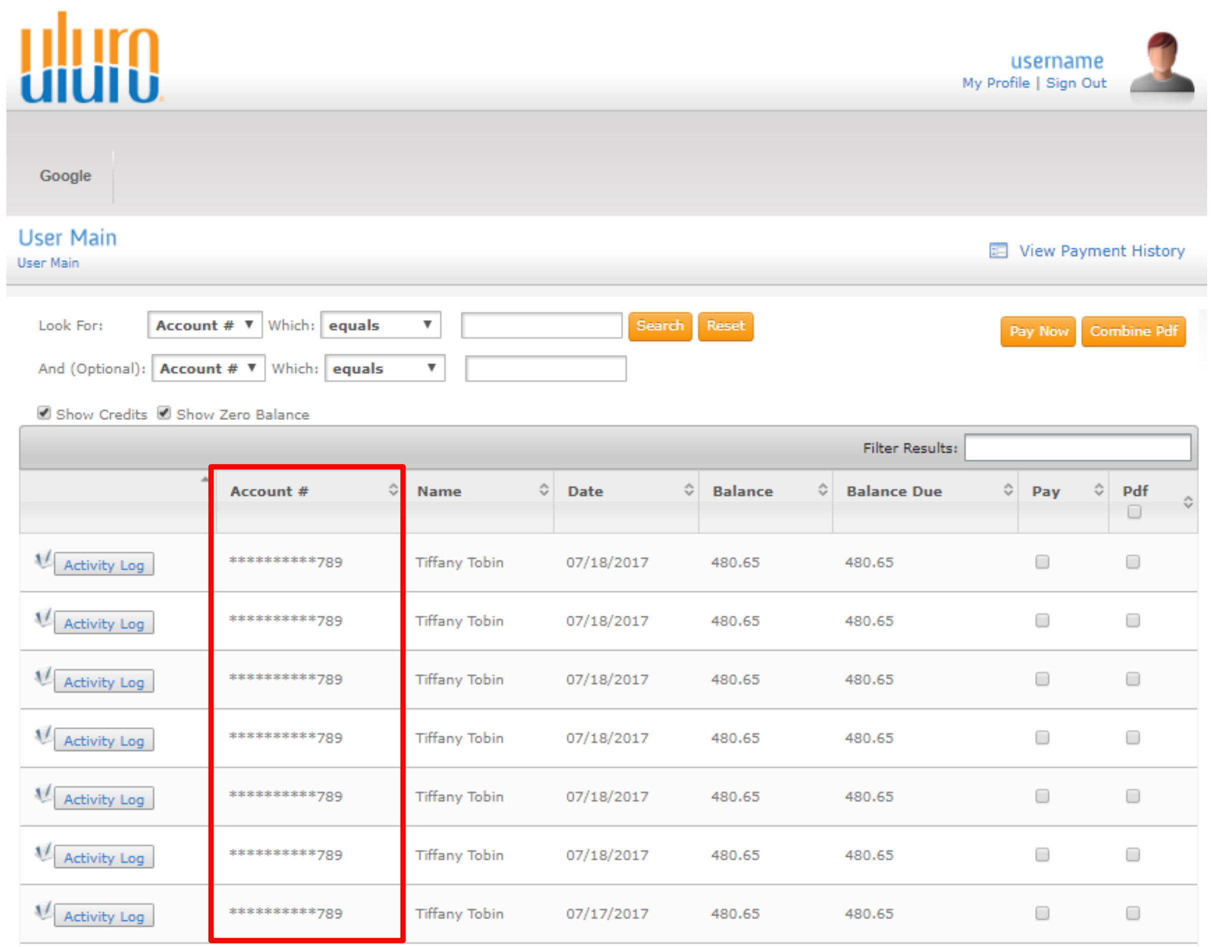


Mask Account Number

Mask Account Number – Check this to enable this feature.

Number of unmasked characters – This will replace each number of the Account Number with an * other than the number of characters entered here to keep unmasked.

This will only take effect for standard users; Admin users will still be able to see the account number unmasked.



Web Ads

Web ads are digital inserts that appear above the document when the document is viewed by any user type.

Ad Area – Select the area position for this ad to be displayed. If an area does not have an ad to display, the area will have a blank spot; the images will not be moved to fill in blank areas.

Enabled – Check this box to enable the image to be displayed if the conditions are met.

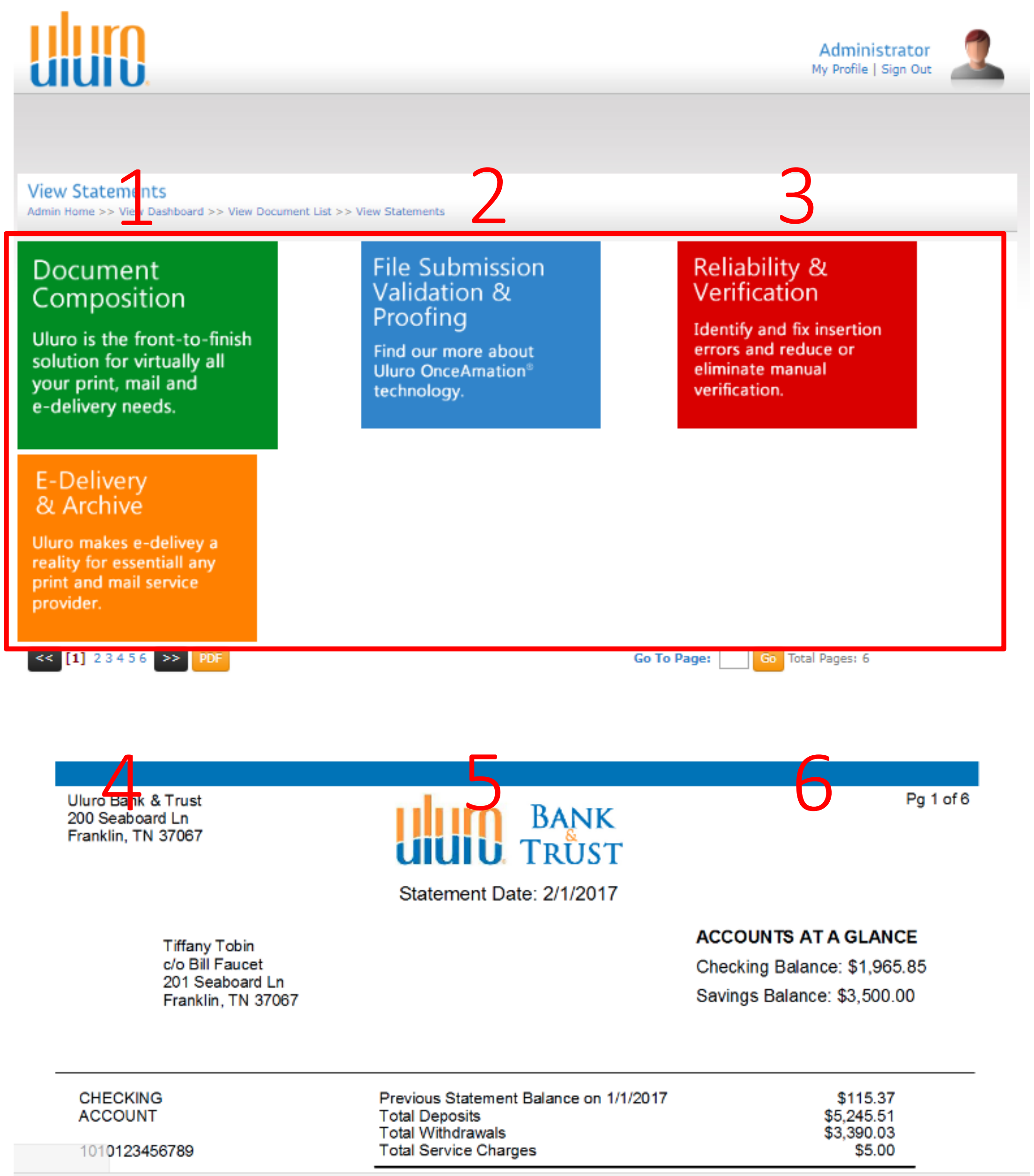
Start Date – The date the image will begin to be displayed for documents of this Submission type.

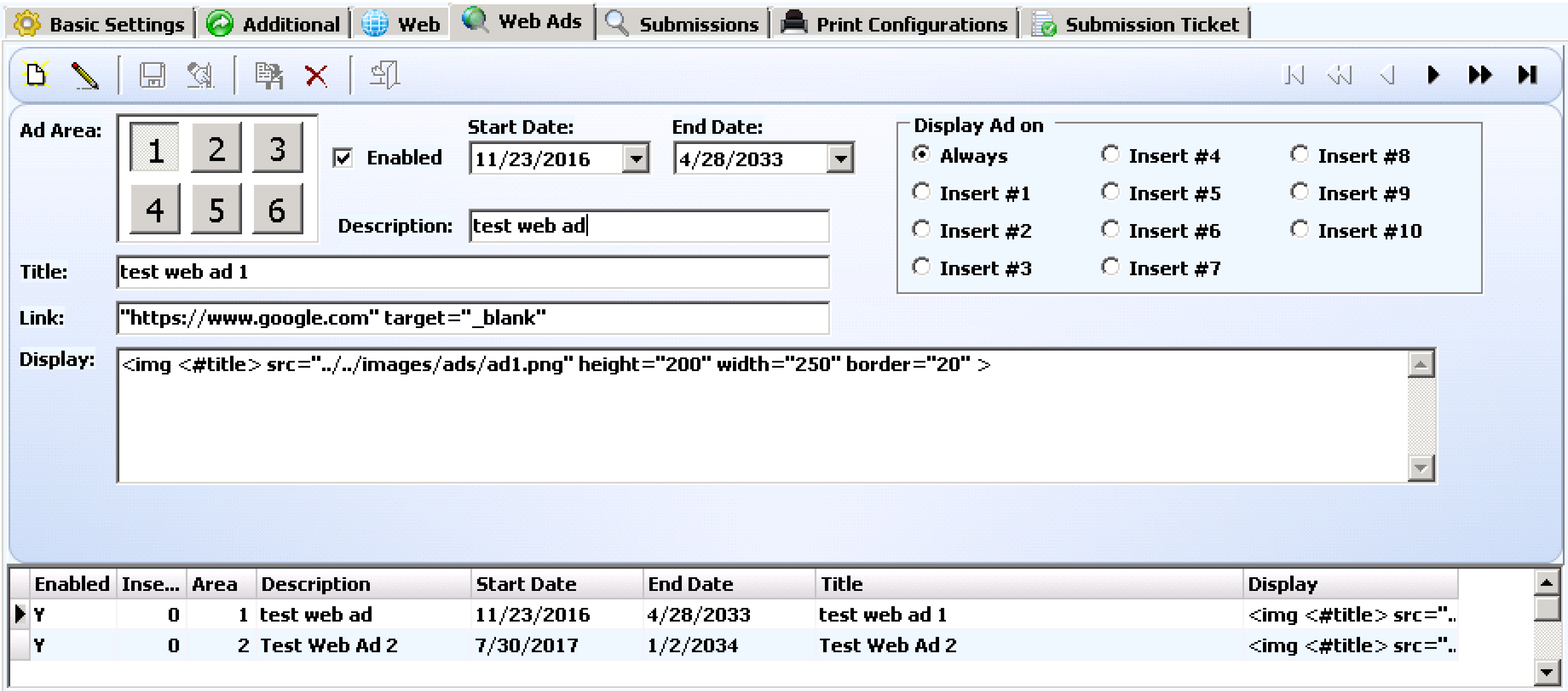
End Date – The date the image will stop being displayed for documents of this Submission type.

Display Ad on – This allows the ad image to be displayed all of the time or be conditionalized based on a flag in the map/data.

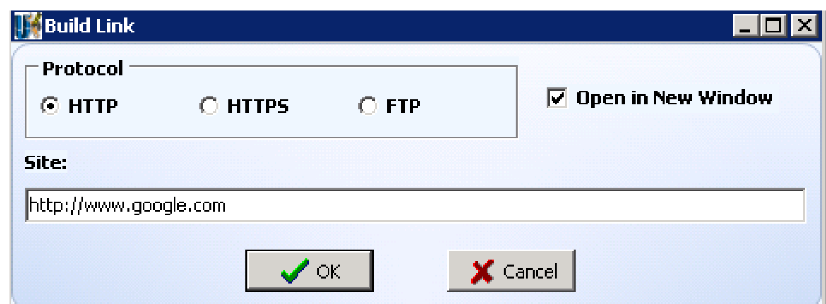
Description – Enter a text to describe the ad.

Title – This text will be displayed if the user hovers over the ad.





Link – If the user clicks on the image this link will be opened in the current window or a new window. Click on the edit button next to this field or manually enter the link.



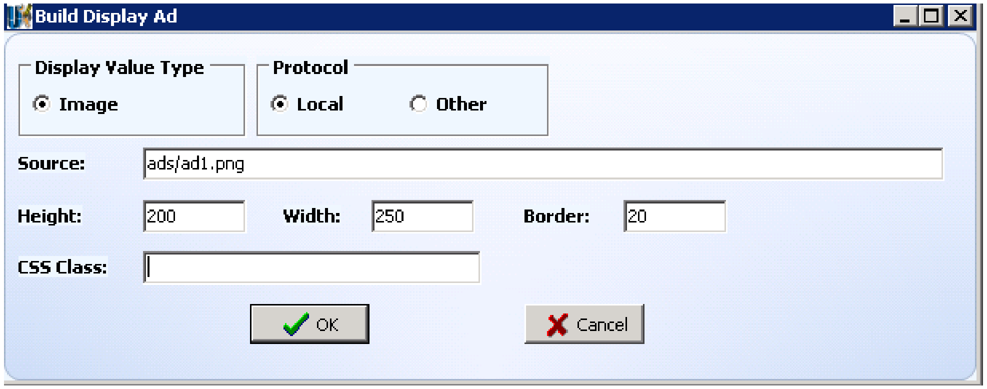
Protocol – Select the appropriate protocol for the link.

Site – Enter the site, secure site, or FTP site based on the protocol selected.

Open in New Window – Check this if the link should be opened in a new window. This will depend on the browser the user is in when viewing their document.

Click OK.

Display – This is the source of the ad from the Images directory. The size of the image can be adjusted here. This is limitied to 1000 characters and an HTML entry can eb used. Click on the edit button next to this field or manually enter the information.



Display Value Type – This will always be Image.

Protocol – Select the appropriate protocol.

Source – Enter the source of the image. This uses a relative path to your web30\images\ directory.

Height/Width – Enter the height dimension of the image in pixels. This value determines the display size of the image. If this is blank the image will display in the default size of the image.

Height/Width – Enter the width dimension of the image in pixels. This value determines the display size of the image. If this is blank the image will display in the default size of the image.

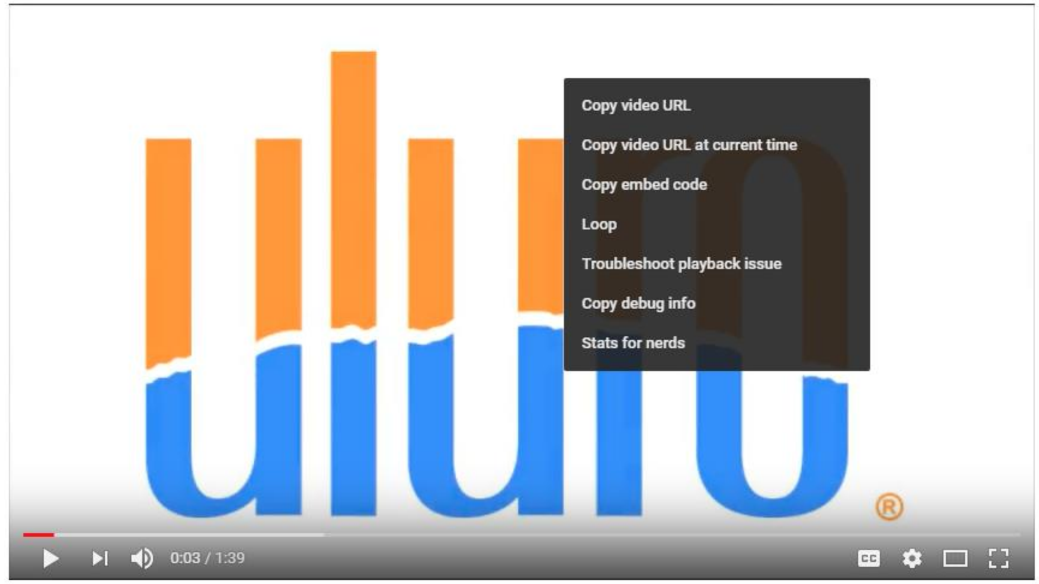
Border – Enter the Border size in pixels. Leave this blank for No border. The border will be white by default.

CSS Class – If you want to use CSS class with the image then enter the Class name. These CSS classes are setup mainly to define the Positions of the areas. They can be used to modify other characteristics of the Web Page. You can create a custom CSS class within the customized general.css for the site (general_122.css for example). This will be the CSS used to display the page associated with the link.

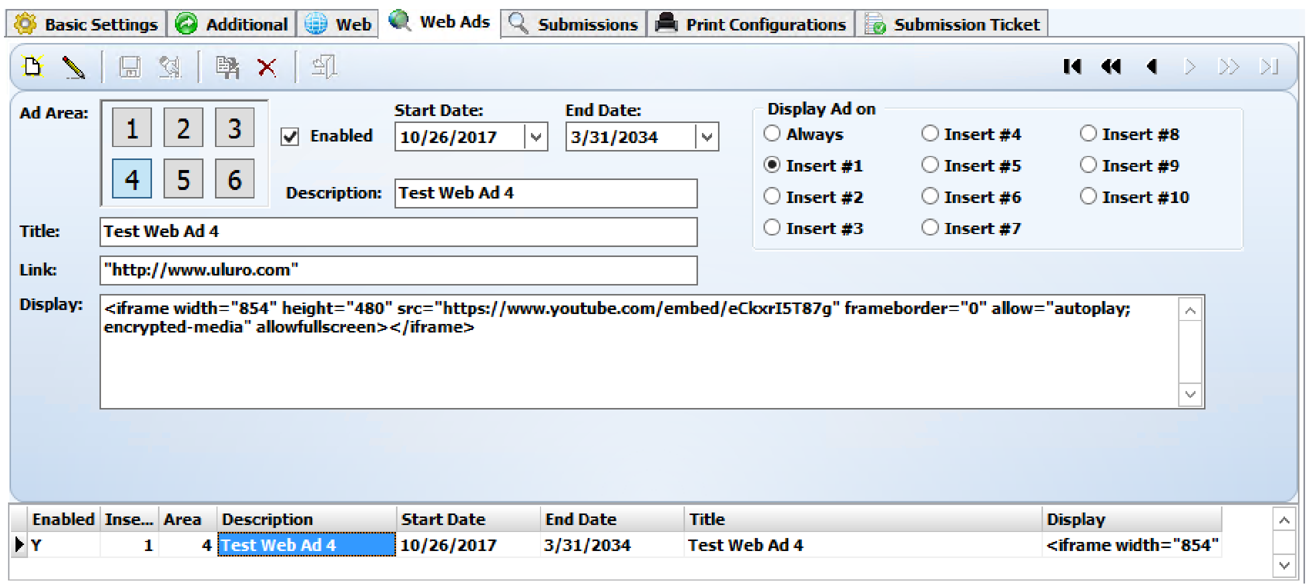
Click OK.

If you use the Display builder, you will notice that it includes the data <#title>. This causes the Title to be inserted into the Image. If you enter your own HTML you may include <#title> to include the title.

To embed a video into one of the web ad areas, right cick on the video and select Copy Embed Code. Paste the code into the Display field.



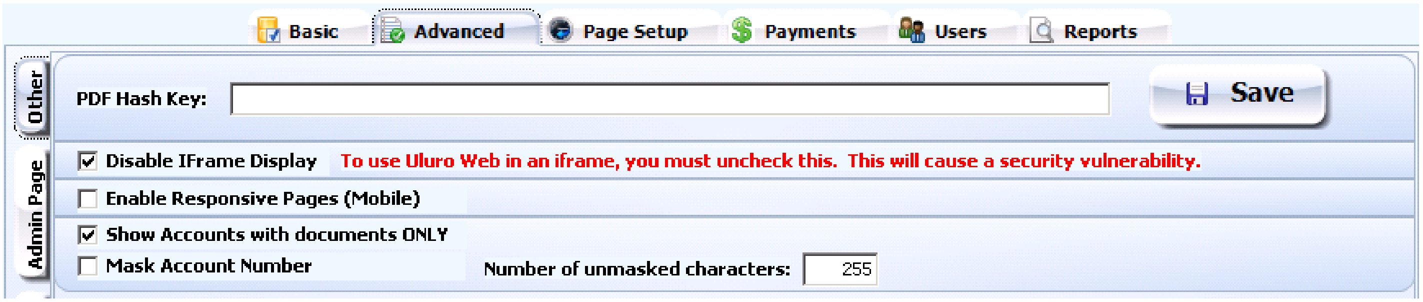
What is Uluro ?



PDF Hash Key for Document Retrieval

This is a Web API that is designed to define the application programing interface (API), protocols, security and data formats required to list and retrieve documents from the ULURO portal. Representational State Transfer (REST) services are required.

The PDF Hash Key is the Secret key that is used to generate the HMAC-MD5. This is used to authenticate the request being made to Uluro.



List Documents

Web request

Provide the following information

Client ID - This is the CLID

Account Number – String of the Account Number

HMAC – Hash created by URI using the Hash Key from WebCustSettings Hashkey field for the Customer (client id). In Usetup this is the Web Setup page, Advanced tab, then Other Tab. The field is PDF HASH Key.

Return Set

Document information

ID – document ID from documents table

Type – Pull from Extrafields view. Field Name DocType

Created date – Docdate from documents table

Account information

Account number – account from documents table

Email – sys_EmailAddress from documents table, if missing then use emailaddr from dbo.webutoacct in the uluro database. This will be linked to the Document by subtypeid and account.

Name – Accname from documents table

Miscellaneous

Values from Misc field on document table

MiscellaneousDate1 – `Sys_MiscDate1 from documents table`

MiscellaneousDate2 – `Sys_MiscDate2 from documents table`

MiscellaneousText1 - `Sys_MiscText1 from documents table`

MiscellaneousText2 - `Sys_MiscText2 from documents table`

MiscellaneousText3 - `Sys_MiscText3 from documents table`

MiscellaneousText4 - `Sys_MiscText4 from documents table`

MiscellaneousText5 - `Sys_MiscText5 from documents table`

Inserts

This may be turned off. It may be necessary to return only blank for now.

Read the Inserts field in Documents table. Each character is Y or N. If Y the insert that corresponds to the character number.

Example inserts = 'NYNNYNNNNN' would result in

Inserts2, inserts5

There should not be an Inserts0. If no inserts, then leave inserts blank.

Service: List Documents

Description: Lists all documents for an account.

URI: /api/v1/clients/{clid}/accounts/{account}/documents?hmac=bdd0729c076c894040263d49008109b4

Parameters: [clid = client id, account = account number, hmac = HMACMD5 of URI]

Methods: [GET]

Content Type: [text/xml]

Content Example:


```xml
<?xml version="1.0" encoding="UTF-8"?>
<Documents xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
 xsi:noNamespaceSchemaLocation="ULURO.xsd">
  <Document id="123456" type="regular" created="2006-05-04">
      <Account number="00012345678" email="test@test.com" name="John
H. Doe"/>
      <Miscellaneous>
          <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
          <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
          <MiscellaneousText1>Regular Statement</MiscellaneousText1>
          <MiscellaneousText2>MiscellaneousText20</MiscellaneousText2>
          <MiscellaneousText3>MiscellaneousText30</MiscellaneousText3>
          <MiscellaneousText4>MiscellaneousText40</MiscellaneousText4>
          <MiscellaneousText5>MiscellaneousText50</MiscellaneousText5>
       </Miscellaneous>
       <Inserts>Inserts0</Inserts>
    </Document>
    <Document id="123457" type="notice" created="2006-05-04">
      <Account number="00012345678" email="test@test.com" name="John
H. Doe"/>
      <Miscellaneous>
          <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
          <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
          <MiscellaneousText1>Overdaft Notice</MiscellaneousText1>
```

```
			<MiscellaneousText2>MiscellaneousText21</MiscellaneousText2>
			<MiscellaneousText3>MiscellaneousText31</MiscellaneousText3>
			<MiscellaneousText4>MiscellaneousText41</MiscellaneousText4>
			<MiscellaneousText5>MiscellaneousText51</MiscellaneousText5>
		</Miscellaneous>
		<Inserts>Placeholder</Inserts>
	</Document>
</Documents>
```

Example of the XML schema:

```
<?xml version="1.0" encoding="UTF-8"?>
<Documents xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
 xsi:noNamespaceSchemaLocation="ULURO.xsd">
    <Document id="123456" type="regular" created="2006-05-04">
        <Account number="00012345678" email="test@test.com" name="John H. Doe"/>
        <Miscellaneous>
            <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
            <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
            <MiscellaneousText1>Regular Statement</MiscellaneousText1>
            <MiscellaneousText2>MiscellaneousText20</MiscellaneousText2>
            <MiscellaneousText3>MiscellaneousText30</MiscellaneousText3>
            <MiscellaneousText4>MiscellaneousText40</MiscellaneousText4>
            <MiscellaneousText5>MiscellaneousText50</MiscellaneousText5>
        </Miscellaneous>
        <Inserts>Inserts0</Inserts>
    </Document>
    <Document id="123457" type="notice" created="2006-05-04">
        <Account number="00012345678" email="test@test.com" name="John H. Doe"/>
        <Miscellaneous>
            <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
            <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
            <MiscellaneousText1>Overdaft Notice</MiscellaneousText1>
            <MiscellaneousText2>MiscellaneousText21</MiscellaneousText2>
            <MiscellaneousText3>MiscellaneousText31</MiscellaneousText3>
            <MiscellaneousText4>MiscellaneousText41</MiscellaneousText4>
            <MiscellaneousText5>MiscellaneousText51</MiscellaneousText5>
        </Miscellaneous>
        <Inserts>Placeholder</Inserts>
    </Document>
</Documents>
```

Get Document

Web request

Provide the following

Clientid – This is the CLID

Account number – string of the Account Number

Docid – Uluro Docid from documents table

Format – We would only support PDF.

HMAC – Hash created by URI using the Hash Key from WebCustSettings Hashkey field for the Customer (client id). In uSetup.exe this is the Web Setup page, Advanced tab, then Other Tab. The field is PDF HASH Key.

Return

Validate the ClientID and Account number with the Docid. Validate the Format (must be PDF). Validate the HMAC.

If Valid then generate the PDF of the Document and return the Document PDF.

Make sure the PDF is deleted from the file system after it is streamed

Service: Get Document

Description: Retrieves a specific document for an account.

URI: /api/v1/clients/{clid}/accounts/{account}/documents/{docid}?format=pdf&hmac=bdd0729c076c894040263d49008109b4

Parameters: [clid = client id, account = account number, docid = unique document id, format = document type, hmac = HMAC-MD5 of URI]

Methods: [GET]

Content Type: [application/pdf, image/png, text/html]

Content Example: N/A

Protocols

REST requires the use of HTTP. At minimum, the GET method must be supported. Valid HTTP status codes are expected back from all requests.

Success should return HTTP 200, no resource found should return HTTP 404, and internal error should return HTTP 500. Any security exceptions (such as invalid HMAC) should return HTTP 403.

Security

In addition to secure sockets layer (SSL), all URIs must be protected using a keyed-hash message authentication code. Specifically, HMAC-MD5 as

defined in RFC 2104. Using a mutually agreed upon "secret key", an HMAC will be calculated from the URI prior to making a server request. This HMAC will be compared to the HMAC generated by ULURO. If they don't match, it is likely the URL was altered and should be rejected by ULURO.

Example URI:

Note that protocol, host, port and query string parameters are not being hashed.

/api/v1/clients/1234/accounts/00012345/documents/56789

Secret Key Used:

Testing123!

This is what will be entered for the PDF Hash Key in uSetup.exe.

HMAC-MD5 of Example URI:

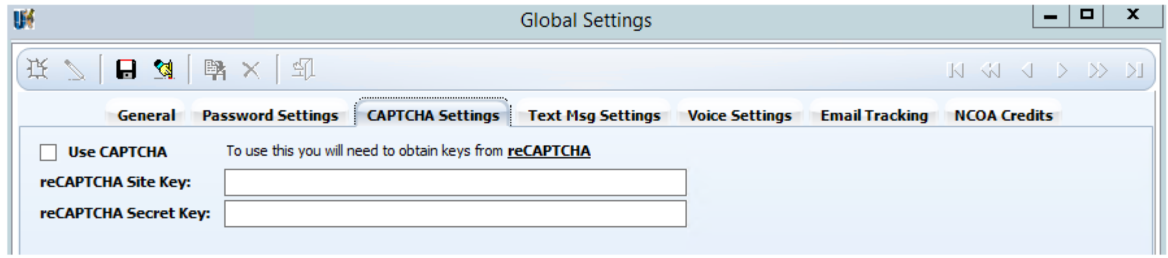
bdd0729c076c894040263d49008109b4

Example URL:

https://client.idconnect.link/api/v1/clients/1234/accounts/00012345/documents/56789?hmac=bdd0729c076c894040263d49008109b4

Further information and tests suites for HMAC-MD5 can be found at http://tools.ietf.org/rfc/rfc2104.txt.

Captcha

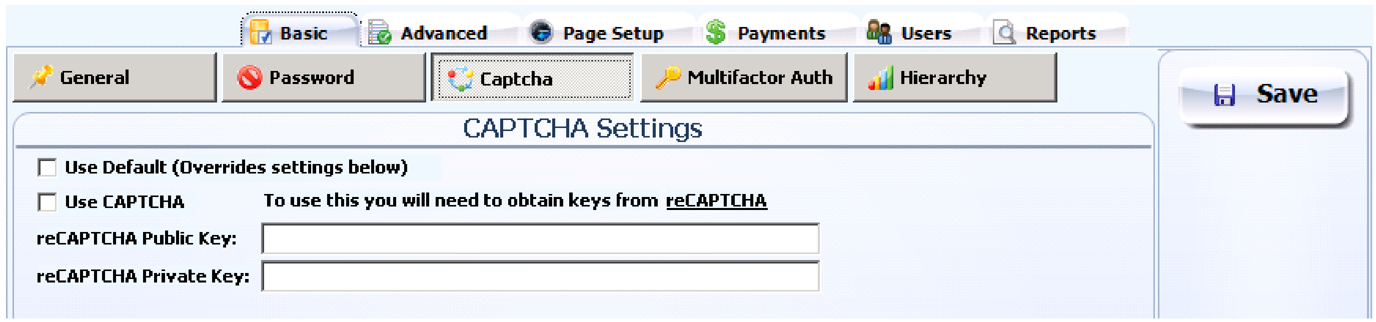


The global credentials are setup under the Configure Menu> Global Settings> CAPTCHA Settings tab.

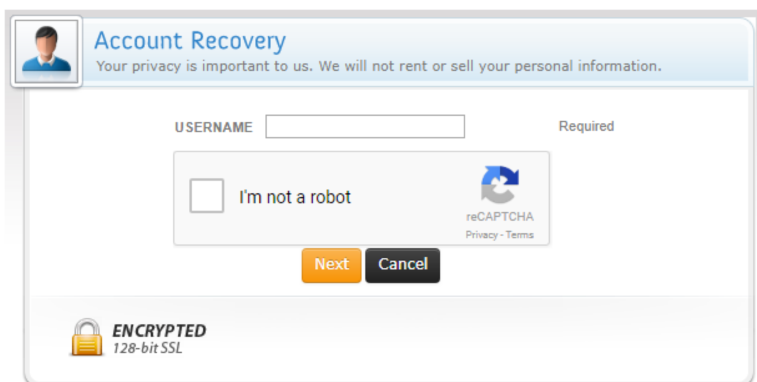
Use CAPTCHA – Check this to enable CAPTCHA for all Uluro sites.

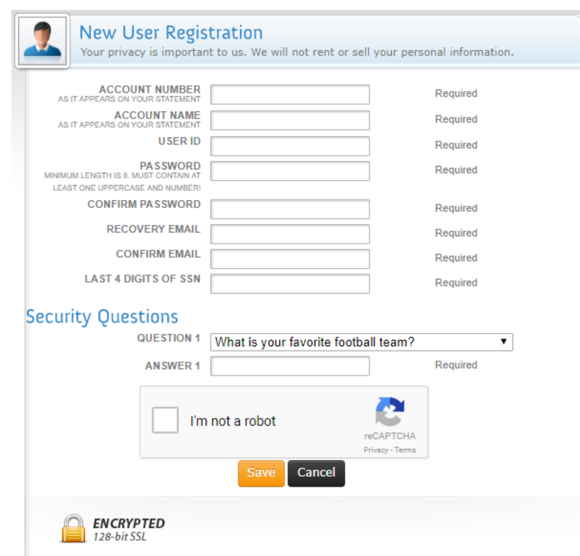
reCAPTCHA – This will take you to the Google Sign In page to set up your account. Once you receive your Keys, enter those here.

CAPTCHA can be enabled at the client level for the site using the global credentials if Use Default is checked. If this client is using different credentials enter those keys here and check Use CAPTCHA to enable them.

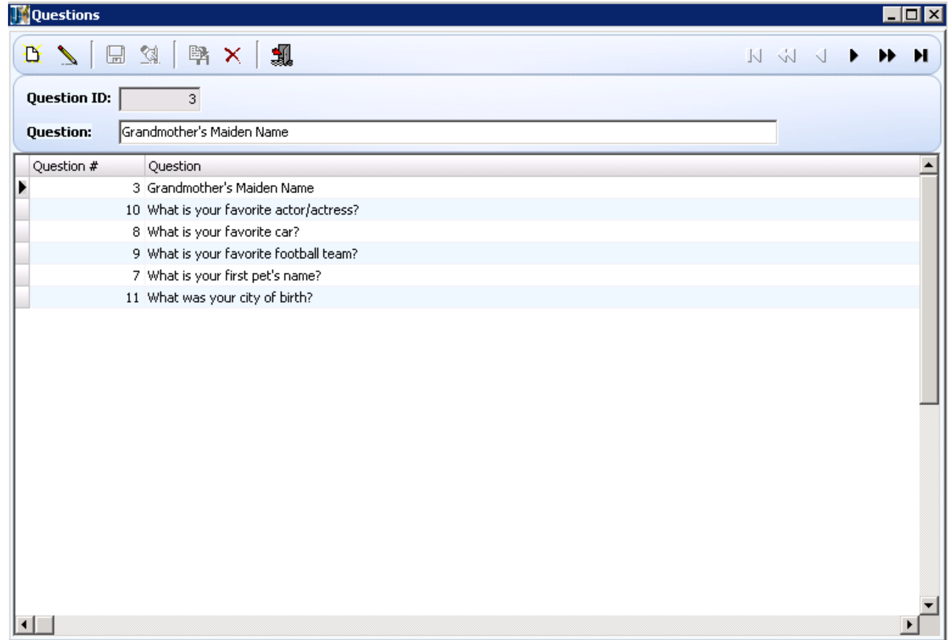


If CAPTCHA is enabled, the default registration page, customized registration page, and Password Verification page will display a CAPTCHA sequence to prevent “bots” from trying to hack the site.





Multifactor Authentication

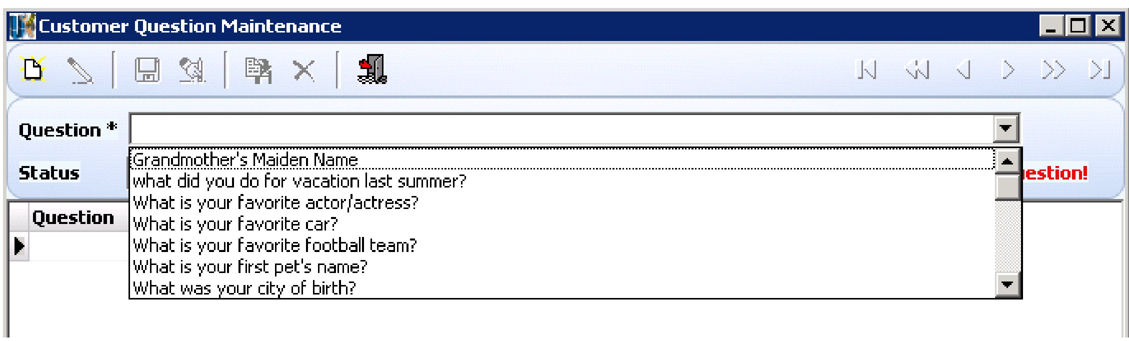


The questions must be set up globally first. This is done under the Configure Menu > Questions

Create as many questions as you would like. This is the question bank that will be available to choose from when enabling Multifactor authentication for each site.

Click New and enter the question.

Within the Web Setup for a site, click the Questions button. The dropdown will display the question bank set up globally. Select the questions for that site. Users will have to answer all of the questions enabled with a **Status** of Active (A) upon login.



Multifactor is enabled with Web Setup >Basic Tab > Multifactor Authentication.

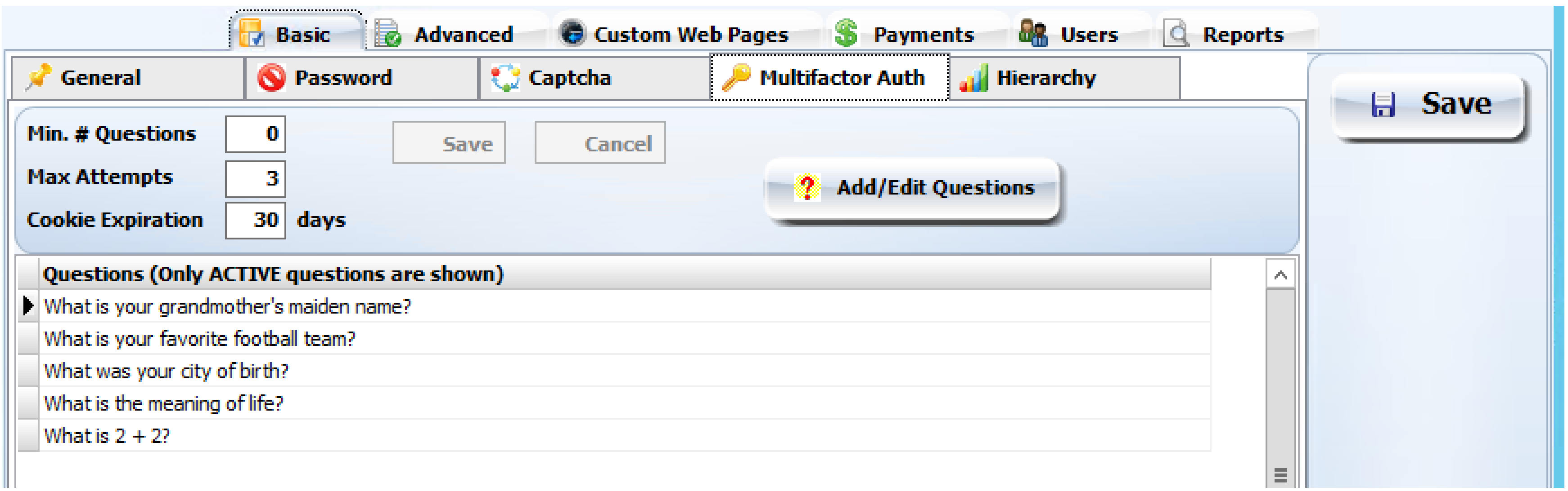
Min # Questions – Zero disables Multifactor Authentication. Any number greater than zero enables Multifactor Authentication.

The user will be asked all questions that are Active for this site under the Questions button upon initial login or the number entered here. If a Min of 3 questions need to be answered and there are only 2 then the user will be asked to enter the answers for the 2 questions instead of 3. If there are 10 questions in the customer list and the Min is 3 questions then the user will have to answer only 3 of the questions to leave the question page.

The users will only be asked one of those questions when authenticating themselves.

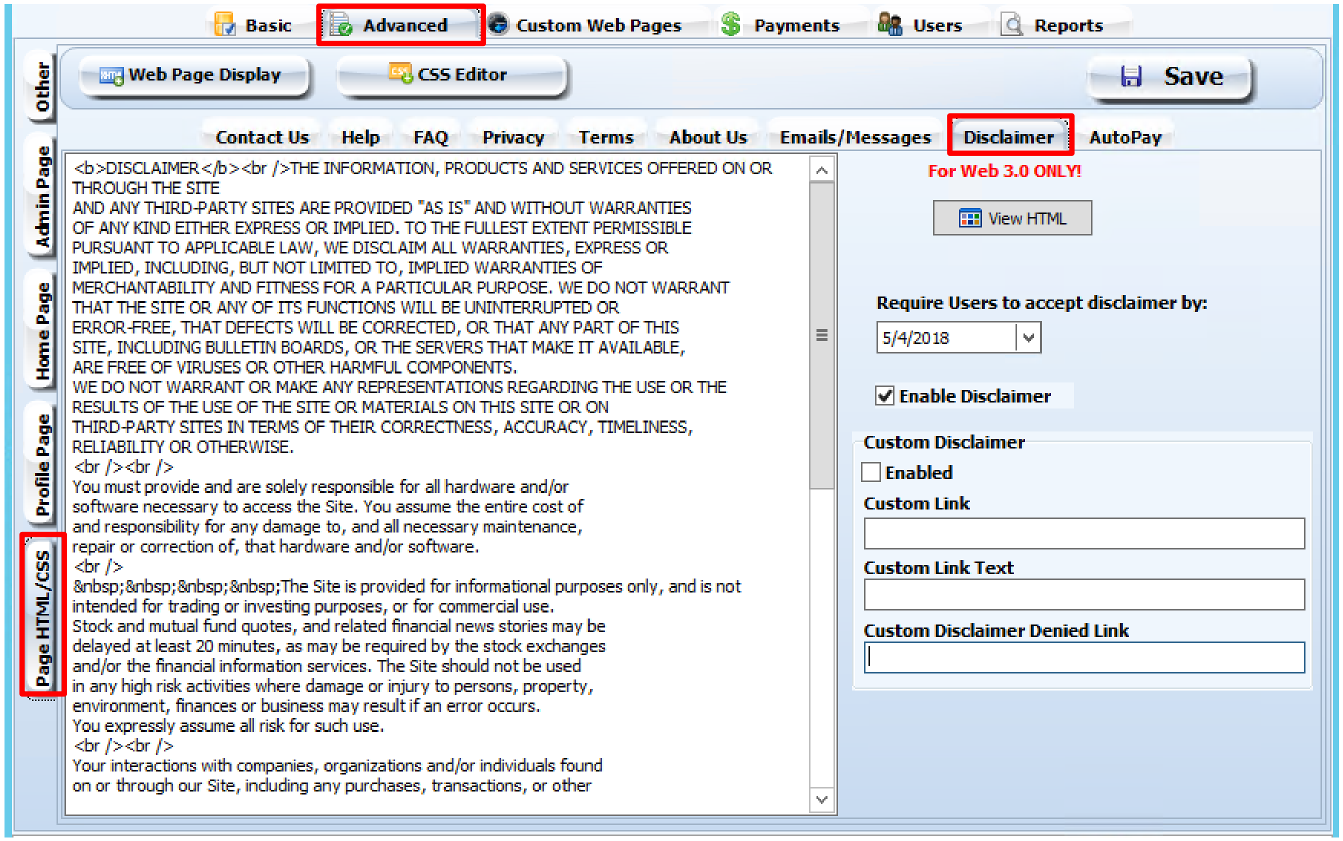
Max Attemplts – When the cookie has expired and the user is required to authenticate themselves by answering the questions, the user is given this number of attempts. After the 3rd attempt (number entered) the user will be redirected back to the Main login page. The user can then login and try to answer the questions again.

Cookie Expiration – The number of days that the browser will remember that the user has authenticated themselves. After the number of days entered here have passed, the user will have to answer a question upon login to authenticate themselves. If the user is usinghier a new browser before the days have passed, they will need to authenticate themselves for that browser.



Disclaimer

The disclaimer is setup and enabled under the Advanced tab > Page HTML/CSS > Disclaimer.



Enable Disclaimer – Check this to require users to accept the disclaimer.

Edit the disclaimer and click the **View HTML** button to view how it will be displayed on the web.

If the date for **Require Users to accept disclaimer by** is changed, all non-admin users for the site will have the disclaimer field set to 'X' requiring them to accept the disclaimer on the next login.

You can also build a customized disclaimer and use that instead. If that is the case,

Check both the **Enable Disclaimer** and the **Enabled** box for the custom disclaimer.

Custom link – This is the URL of the website used to handle the custom disclaimer.

Custom Link Text – This is the text that will hold the URL linking to the custom disclaimer website. This is what will be shown to the user.

Custom Disclaimer Denied Link – This is the URL that the user will be redirected to when rejecting the custom disclaimer. This is an optional field. The user will be redirected to default.aspx if blank.

Note: Any time a change is made to these settings, users will be prompted to accept the disclaimer on the next login because something about the disclaimer has changed.

Custom Disclaimer Process

Confirm.aspx handles both the query and response to the custom disclaimer page.

Query from Confirm.aspx to the Custom Disclaimer Page

This page generates a link to the Custom Disclaimer Webpage. Which when clicked generates a query string with a disclaimer token and return url.

Ex: http://www.CustomPage.com/disclaimer.aspx?DisclaimerToken=<value>&ReturnURL=<value>

The DisclaimerToken generated by Uluro is used to identify the user session on return.

The ReturnURL is a link back to confirm.aspx of the Uluro Site

Query back from the Custom Disclaimer Page to Confirm.aspx

A Custom disclaimer website will return to ReturnURL with a query string containing the token and Boolean result of the disclaimer.

Ex: http://UluroWeb.com/confirm.aspx?DisclaimerToken=<value>&Accept=<Boolean>

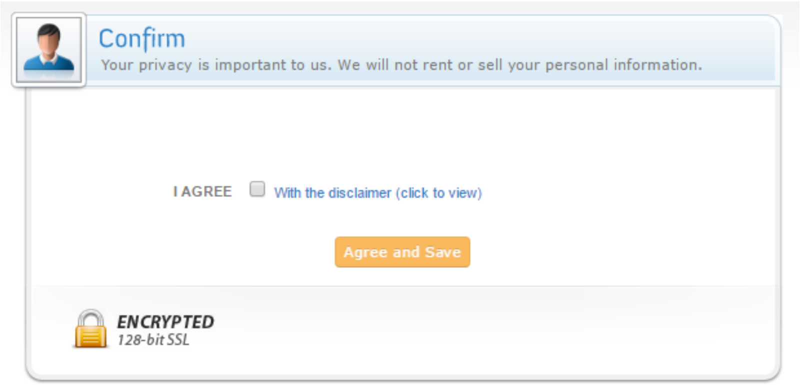
DisclaimerToken is used to identify the user session.

Accept is a Boolean value and is not case sensitive.

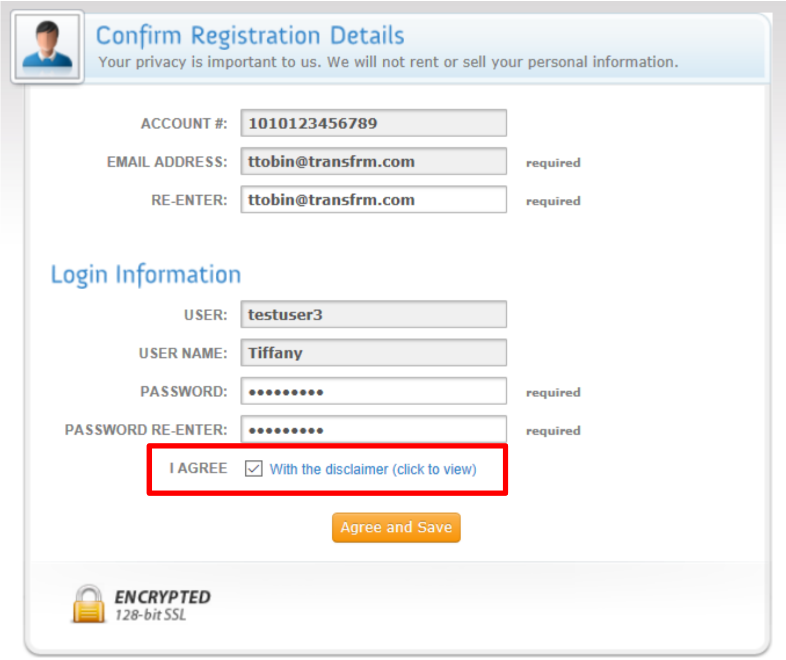
An Accept value of “false” will redirect users to the Custom Disclaimer Denied Link or Default.aspx if that value is blank.

For the default disclaimer:

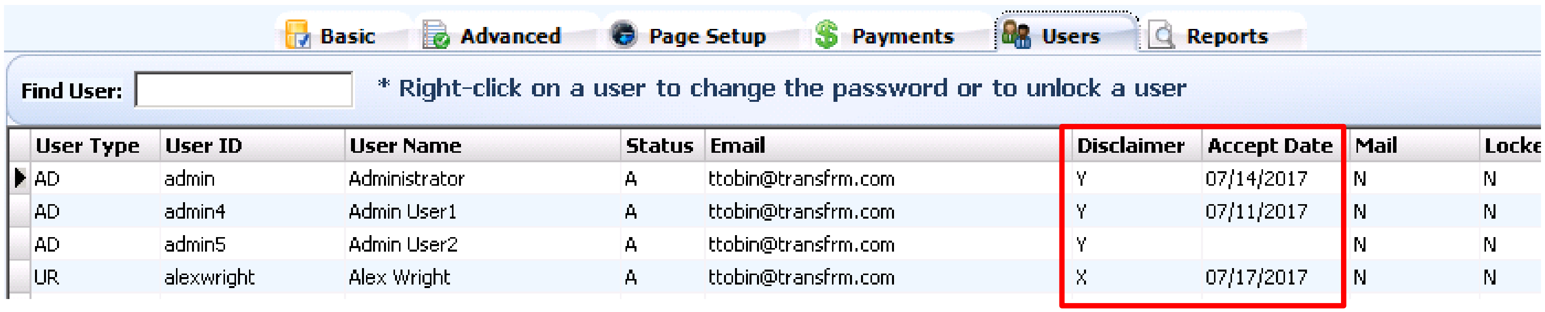
Users will be asked to accept the disclaimer upon logging into the site:



Users self-registering or using the New Registration will be prompted to accept the disclaimer during registration:



When the disclaimer is accepted, the user's profile will identify when it was accepted. This can also be verified under the Users tab.



User Type	User ID	User Name	Status	Email	Disclaimer	Accept Date	Mail	Locke
AD	admin	Administrator	A	ttobin@transfrm.com	Y	07/14/2017	N	N
AD	admin4	Admin User1	A	ttobin@transfrm.com	Y	07/11/2017	N	N
AD	admin5	Admin User2	A	ttobin@transfrm.com	Y		N	N
UR	alexwright	Alex Wright	A	ttobin@transfrm.com	X	07/17/2017	N	N

Y – The user has accepted the disclaimer.

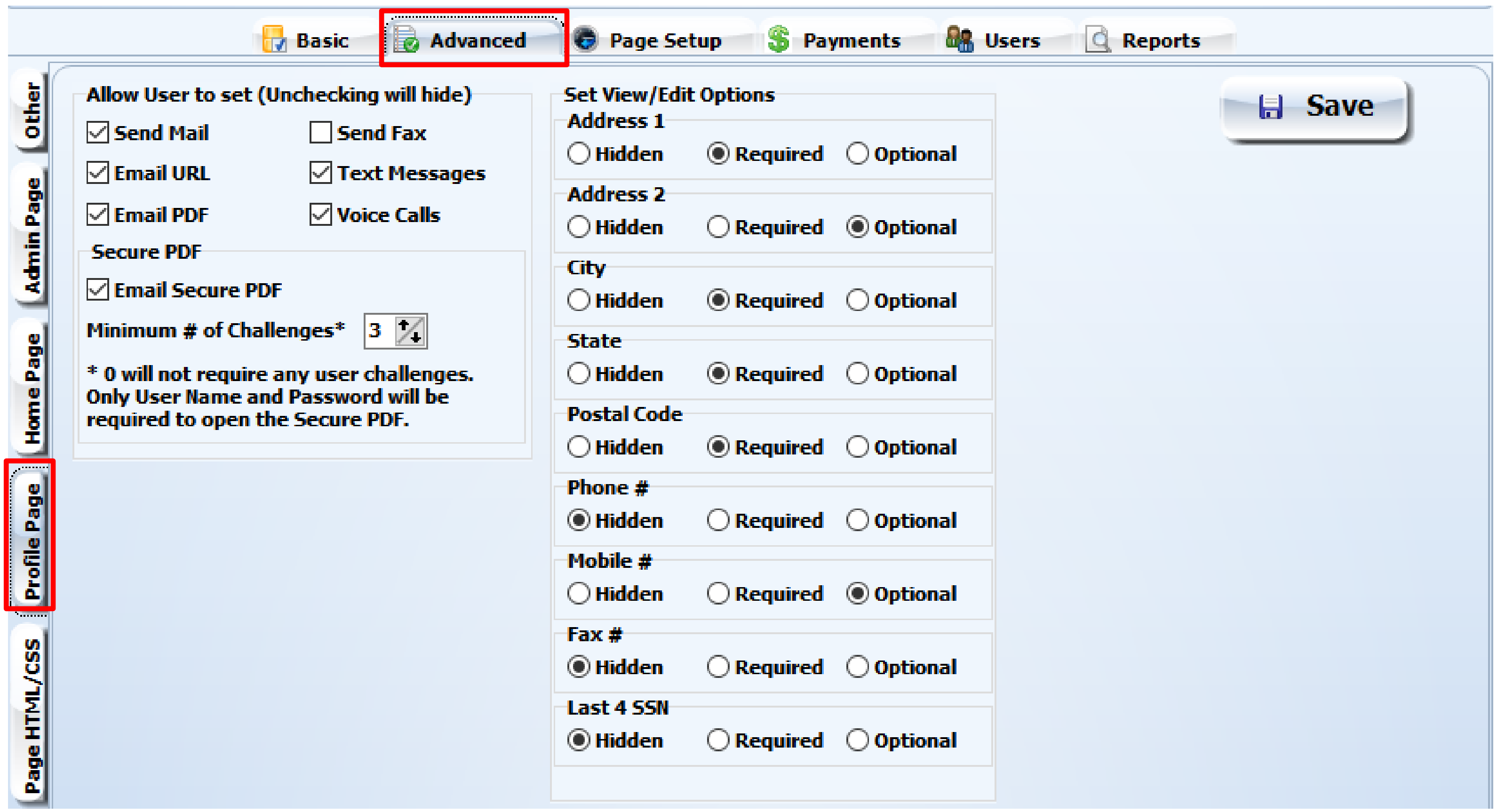
N – The user does not have to accept the disclaimer. Admin users will get marked with N.

X – The user must accept the disclaimer at the next login.

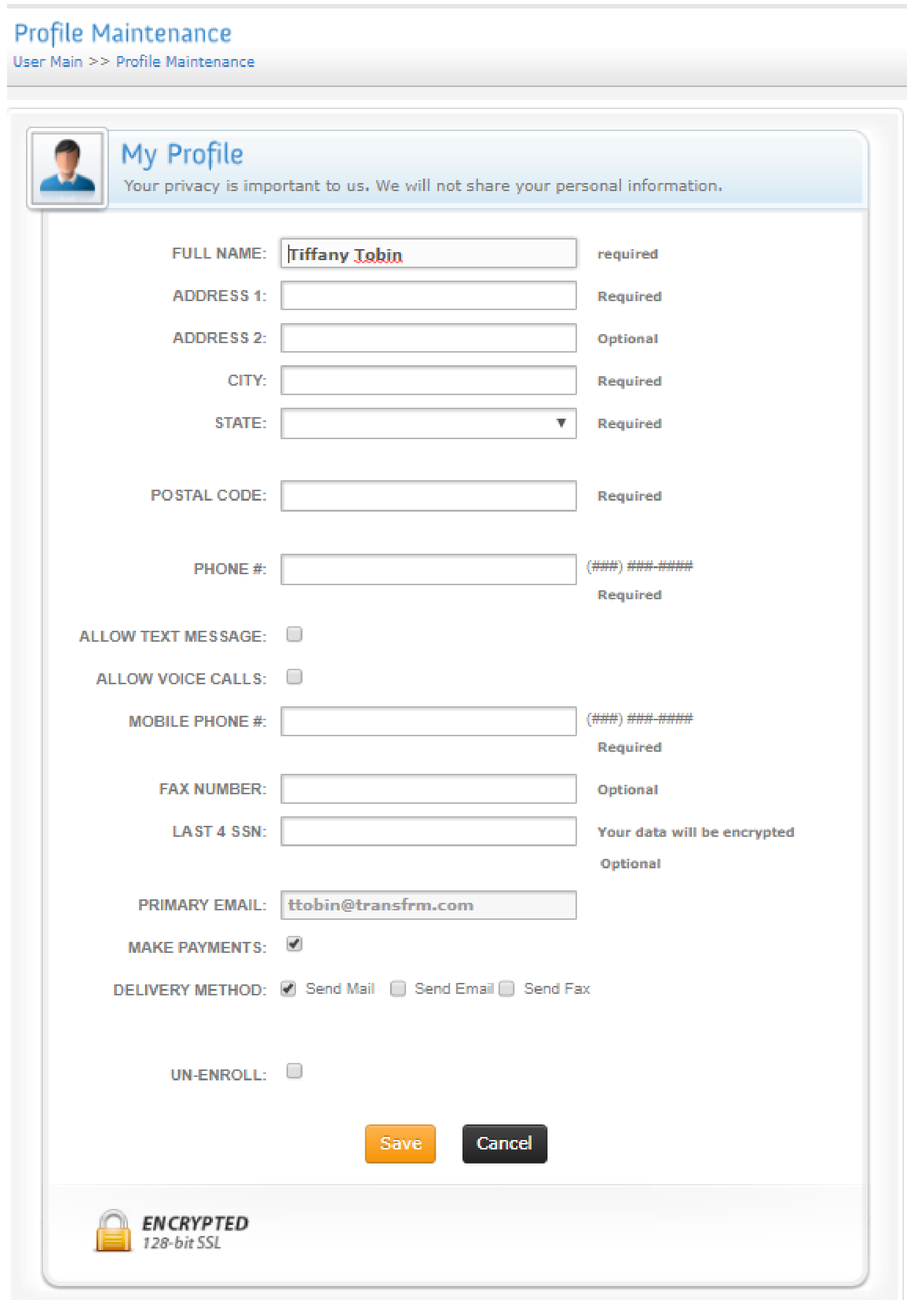
Profile Page Settings

The Profile page is edited under the Advanced tab > Profile Page.

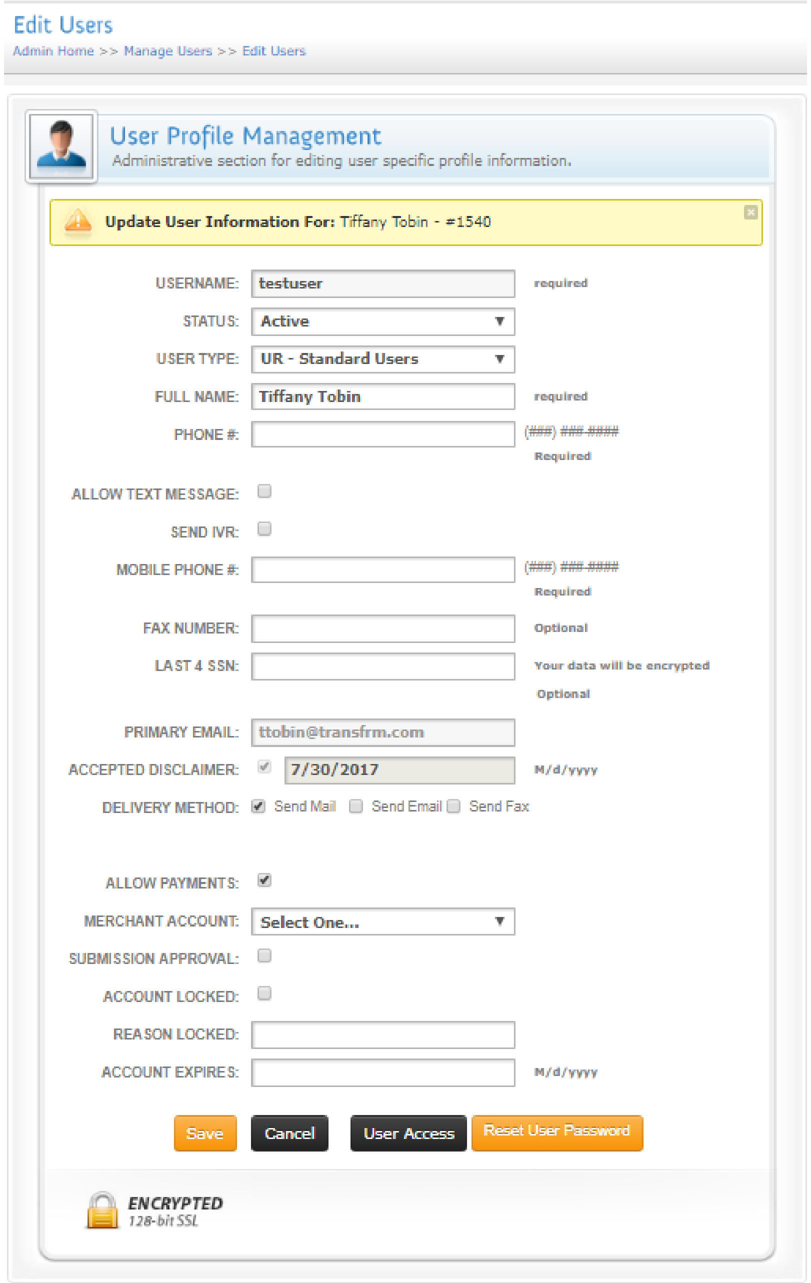
These settings determine what a standard user van view/edit within their profile. It also determines what fields are required for a user to enter on their profile.



The user's view of their profile is nothing is hidden:

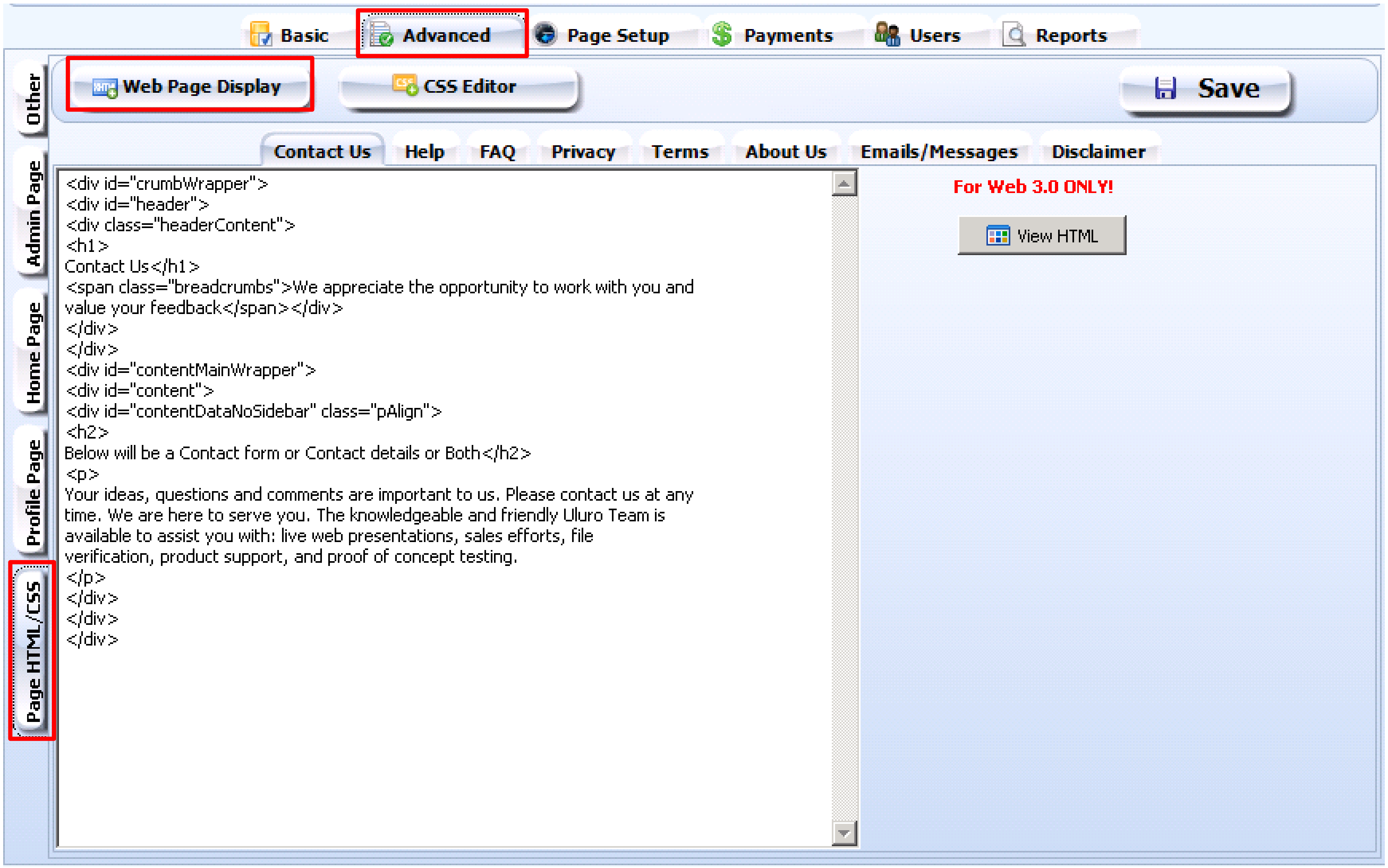


The admin user's view of a user's profile is nothing is hidden:



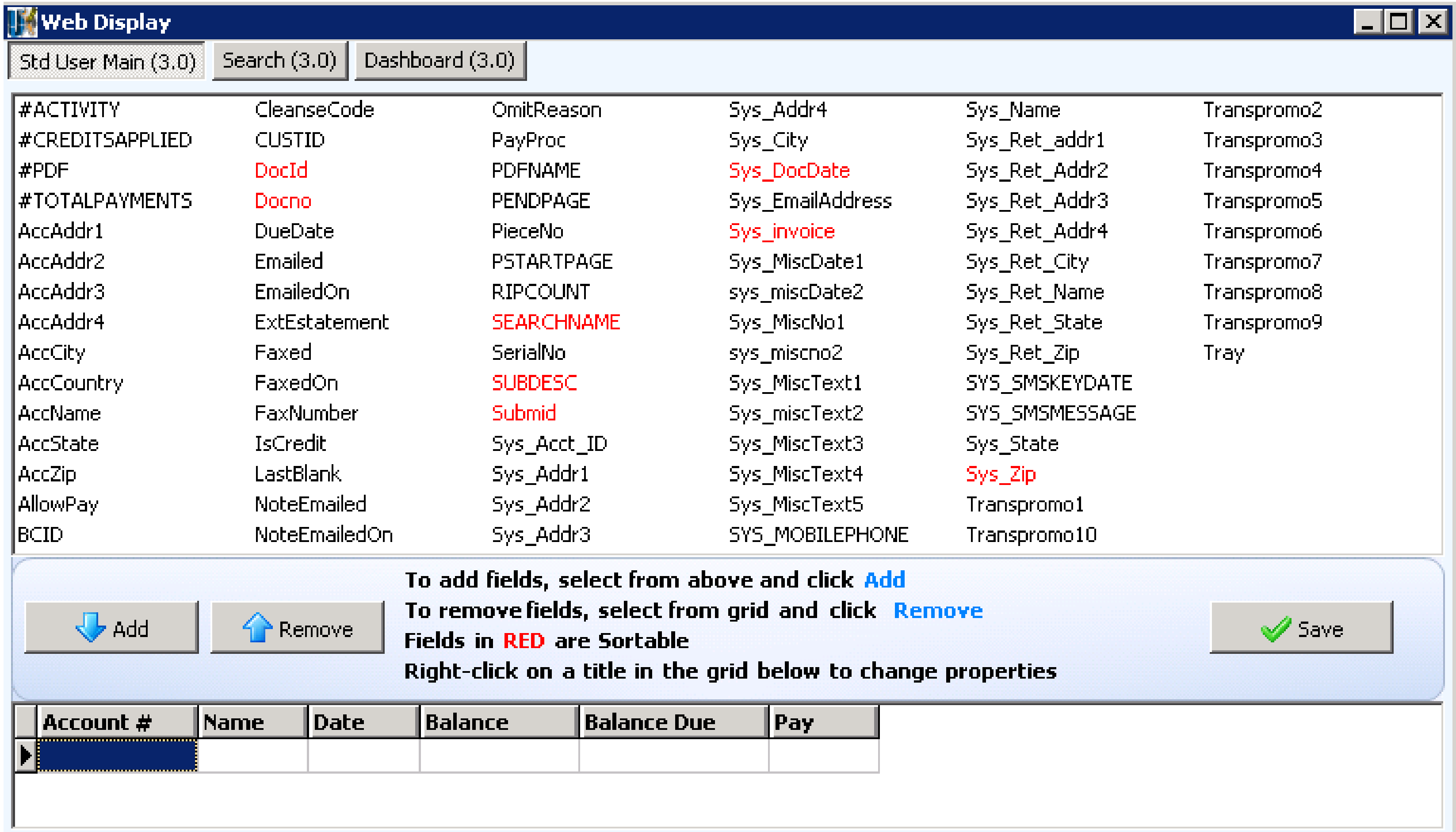
Web Display Settings

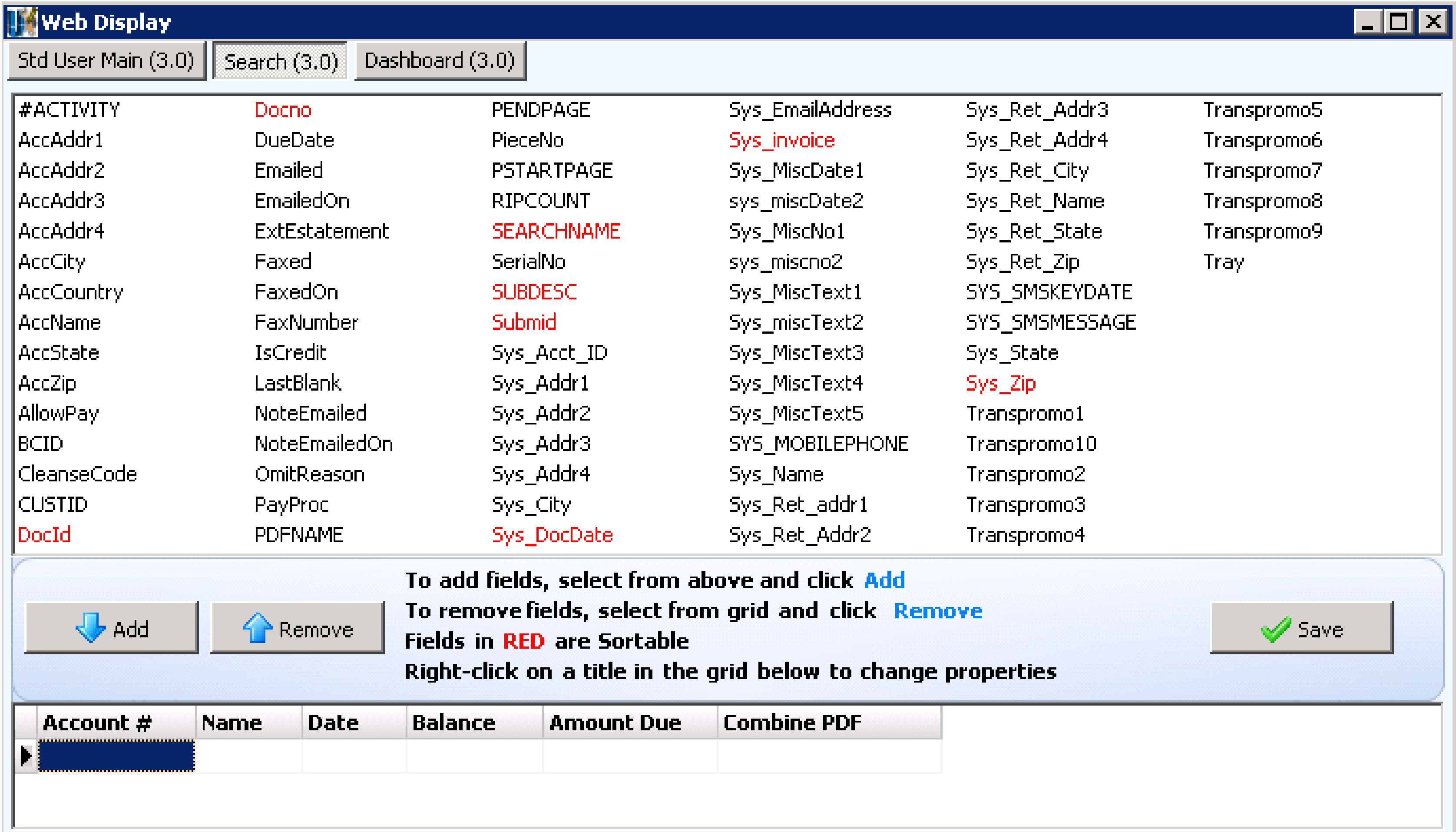
To edit the columns that are displayed on the web, go to Web Setup > Advanced > Page HTML/CSS. Click on the Web Page Display button.



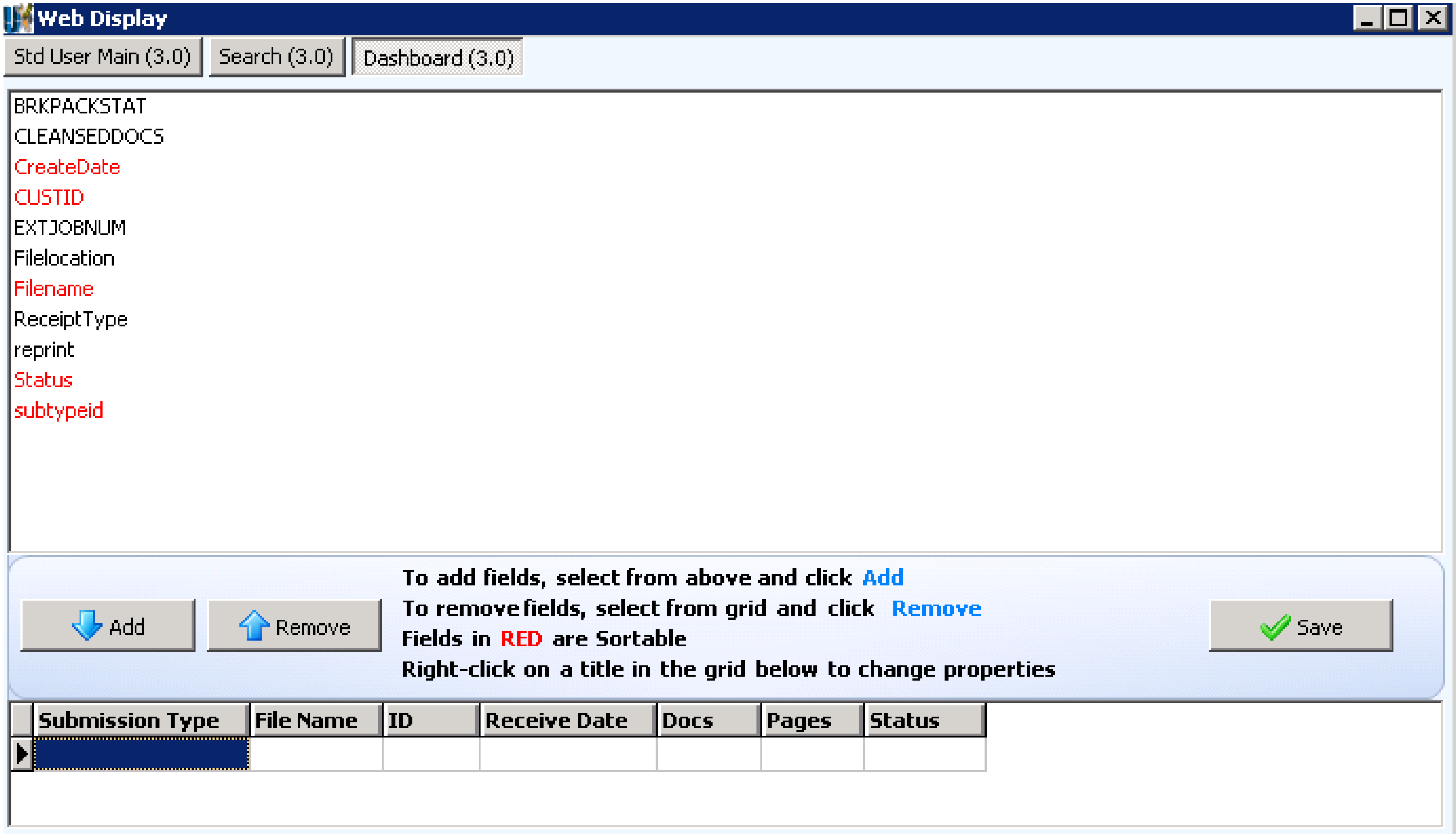
These are the default settings:

Standard User Main



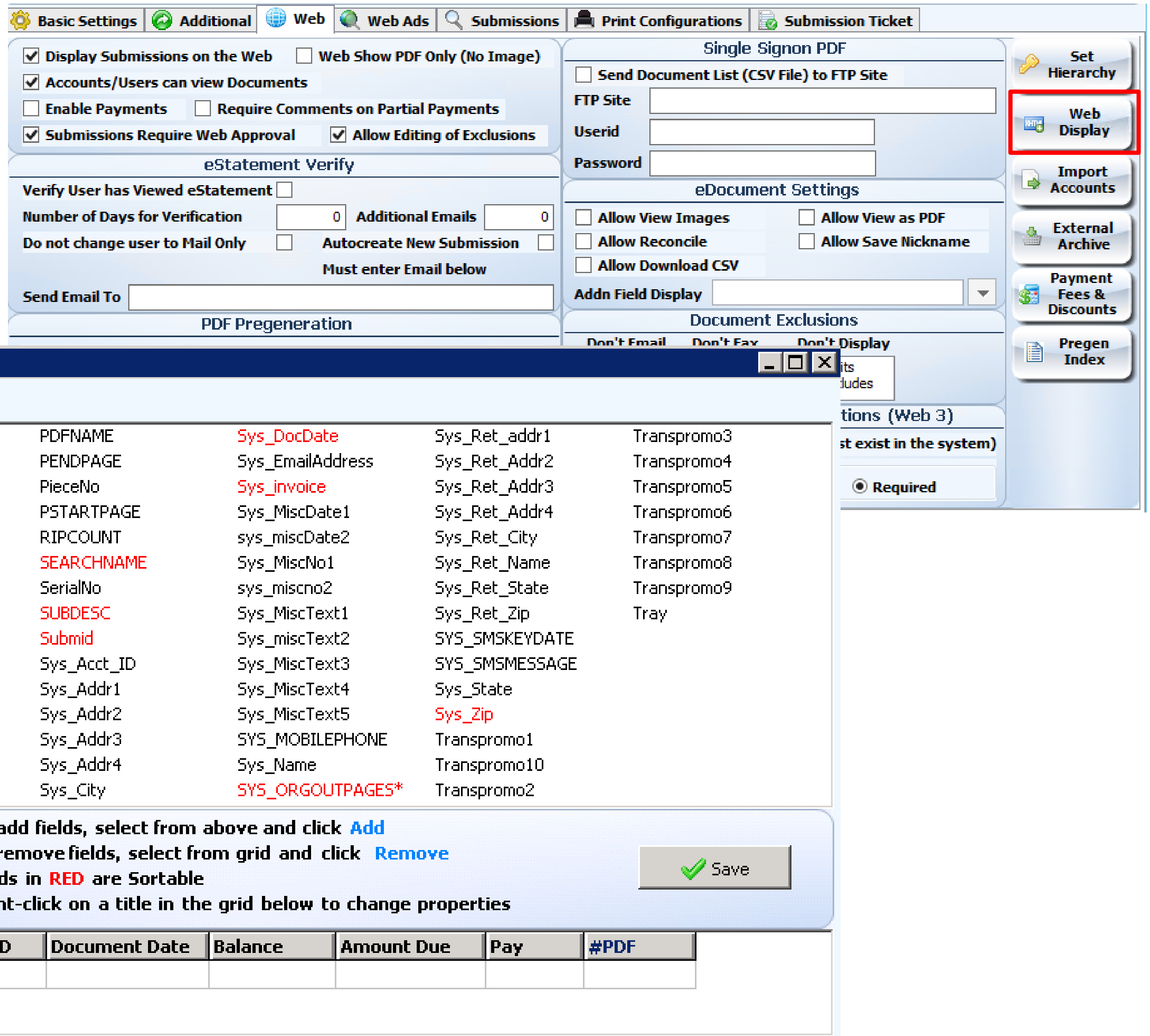

Web Display
Std User Main (3.0)
Search (3.0)
Dashboard (3.0)
#ACTIVITY
AccAddr1
AccAddr2
AccAddr3
AccAddr4
AccCity
AccCountry
AccName
AccState
AccZip
AllowPay
BCID
CleanseCode
CUSTID
DocId
Docno
DueDate
Emailed
EmailedOn
ExtEstatement
Faxed
FaxedOn
FaxNumber
IsCredit
LastBlank
NoteEmailed
NoteEmailedOn
OmitReason
PayProc
PDFNAME
PENDPAGE
PieceNo
PSTARTPAGE
RIPCOUNT
SEARCHNAME
SerialNo
SUBDESC
Submid
Sys_Acct_ID
Sys_Addr1
Sys_Addr2
Sys_Addr3
Sys_Addr4
Sys_City
Sys_DocDate
Sys_EmailAddress
Sys_invoice
Sys_MiscDate1
sys_miscDate2
Sys_MiscNo1
sys_miscno2
Sys_MiscText1
Sys_miscText2
Sys_MiscText3
Sys_MiscText4
Sys_MiscText5
SYS_MOBILEPHONE
Sys_Name
Sys_Ret_addr1
Sys_Ret_Addr2
Sys_Ret_Addr3
Sys_Ret_Addr4
Sys_Ret_City
Sys_Ret_Name
Sys_Ret_State
Sys_Ret_Zip
SYS_SMSKEYDATE
SYS_SMSMESSAGE
Sys_State
Sys_Zip
Transpromo1
Transpromo10
Transpromo2
Transpromo3
Transpromo4
Transpromo5
Transpromo6
Transpromo7
Transpromo8
Transpromo9
Tray
Add
Remove
To add fields, select from above and click Add
To remove fields, select from grid and click Remove
Fields in RED are Sortable
Right-click on a title in the grid below to change properties
Save
Account #
Name
Date
Balance
Amount Due
Combine PDF

Dashboard (Admin)



Custom Search Documents (at the submission level)

This is edited within a submission type, under the Web tab, click the Web Display button. This is to customize the columns for a submission within the Dashboard once a specific submission has been selected.



For all of the 4 Web Display settings,

- The RED fields are searchable/sortable on the web; the black ones are not.
- Save to DB fields will be listed with an * after the name.
- You may remove any of the ones that are listed by default by selecting a column and clicking the Remove button.
- You may add any field listed by selecting it in the list and clicking the Add button.
- The columns can be selected and moved from left to right to change the order they display on the web.

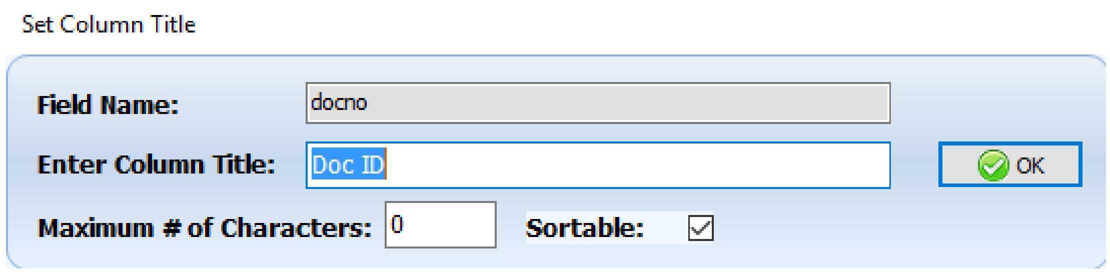
Select a column, right click, and select Set Properties to further edit the column.

The field name cannot be editted.

Column Title – The title of the column that will be displayed on the web.

Maximum # of Characters – This will be the number of characters that appear in the column. If this is 0 all characters will be displayed.

Sortable – If this is checked, the field will appear in the dropdown for filtering and searching for documents. The order the fields appear in the dropdown correspond to the order displayed across the columns.



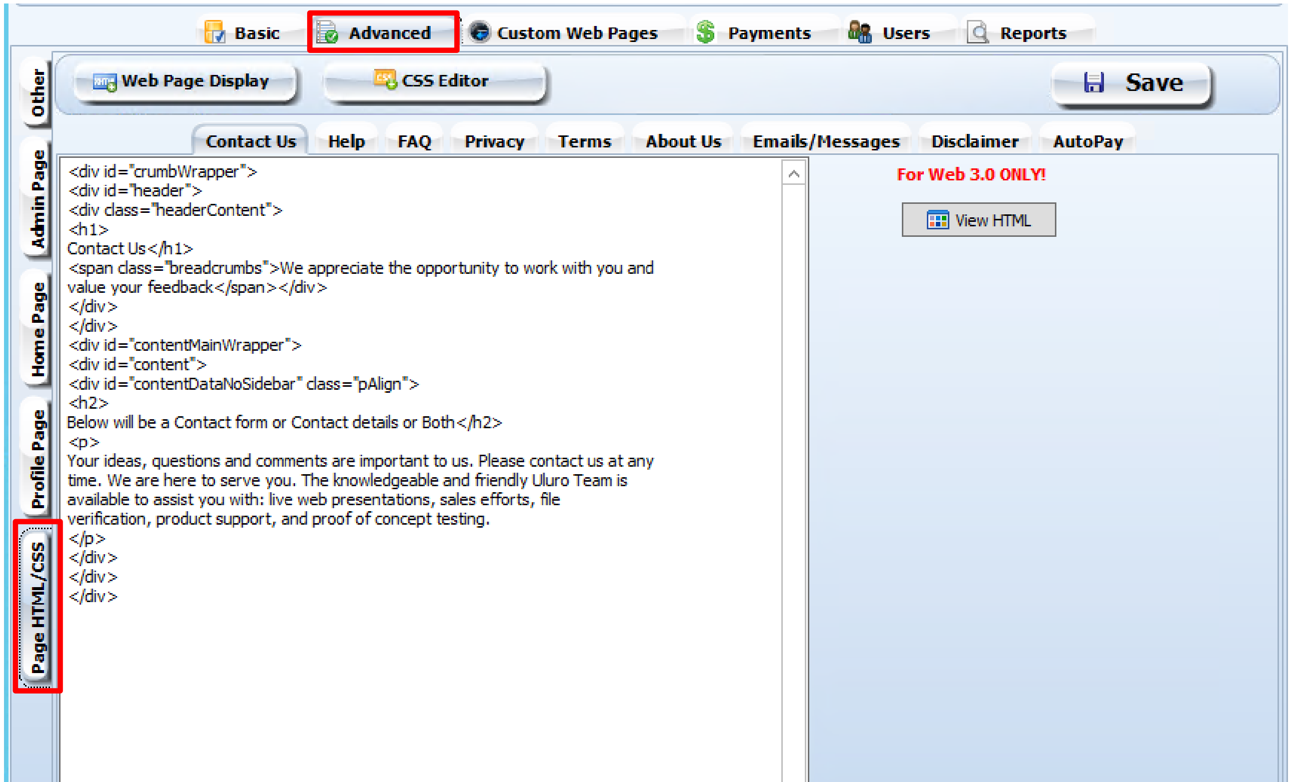
Tips from Transformations:

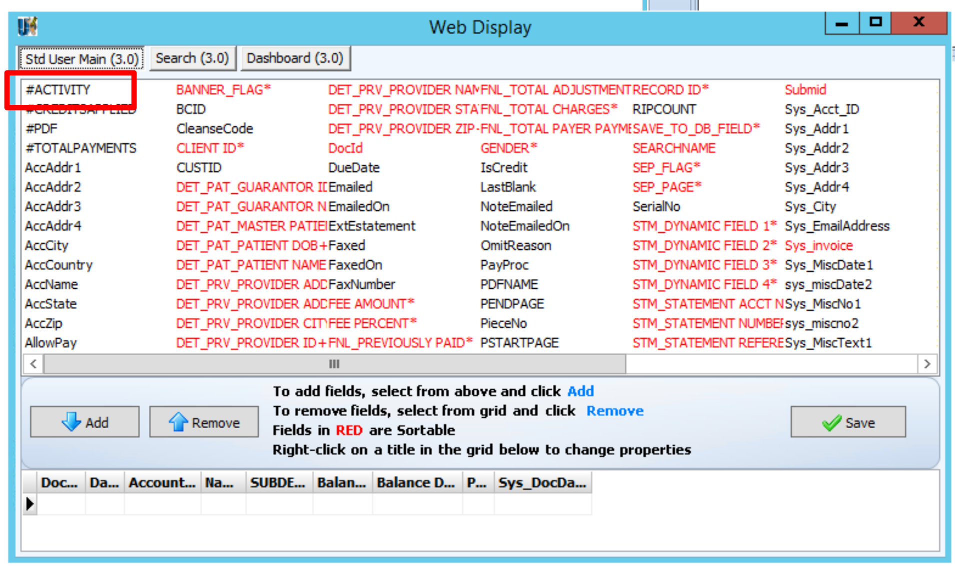
Documents will be sorted by the newest document first for the Standard User Main Page. The Dashboard pages for an admin user will be in descending order according to the first column displayed. The sorts only apply to the page not the entire set of records.

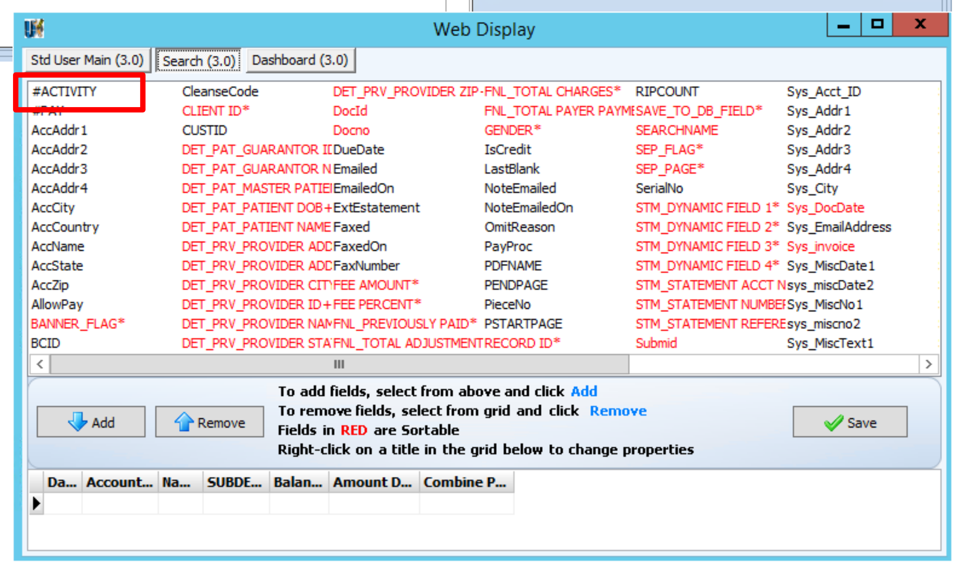
Activity Log

To set up activity log go to uSetup > web setup > advanced tab > Page HTML/CSS. Click on Web Display.

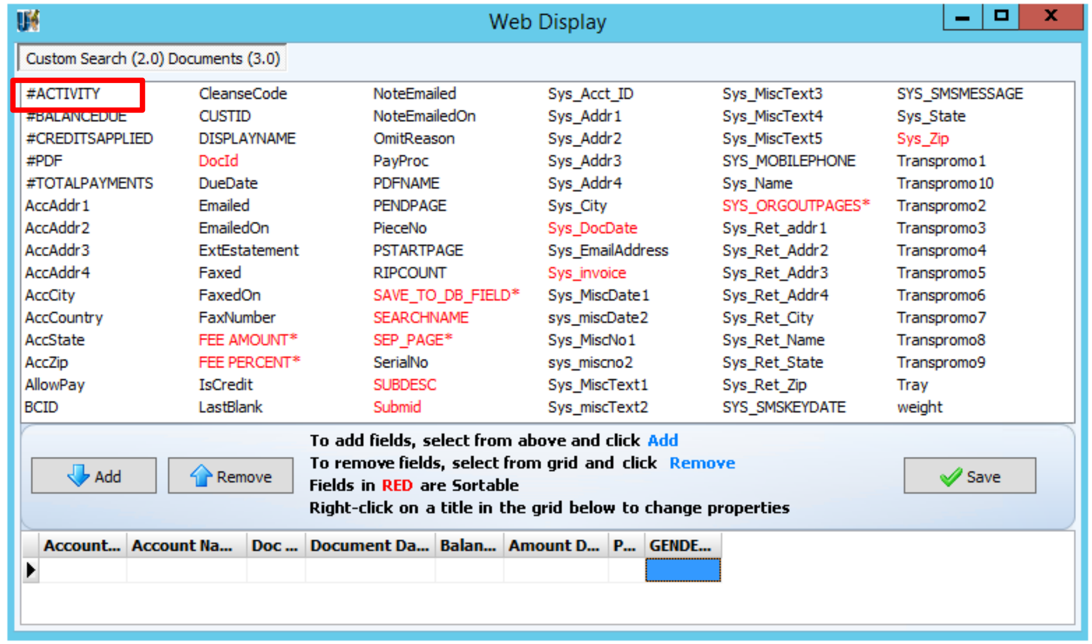
Add #ACTIVITY for the Std User Main or the search page as desired.

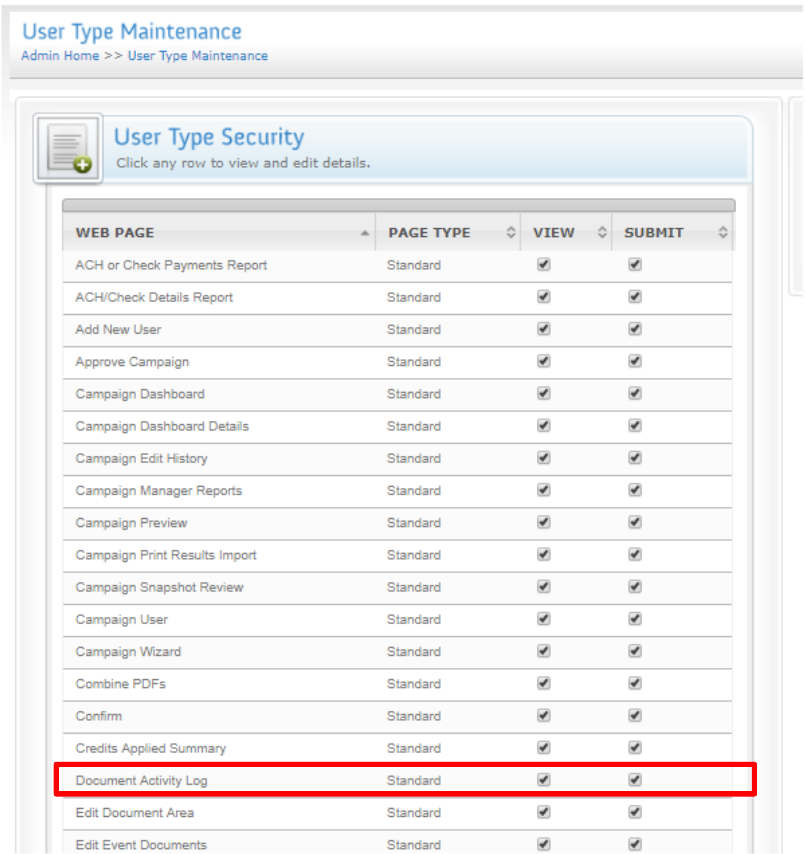






To add it for the custom search page once a submission is selected from the Admin Dashboard, go to the web tab of the submission and select Web Display.





Login as an admin user. Go to the user type you wish to see the Activity Log button and make sure “Document Activity Log is enabled for View and Submit under the security settings.

This will need to be done for each user type that has access to the pages you previously added #ACTIVITY to be displayed. For example, users that have access to see the dashboard such as an admin or the search page, such as a CSR user, would need this security setting. If not, once the button is clicked (since it is displayed), the user will receive an error because that page is not accessible to them. If it has been enabled to be displayed on the Std User Main the standard users or end users would need that security setting.

Log in as any of the users you have given that security setting. Access any of the pages you have displayed #ACTIVITY on and you will see the Activity Log button next to the icon to view the document.

Filter Results:

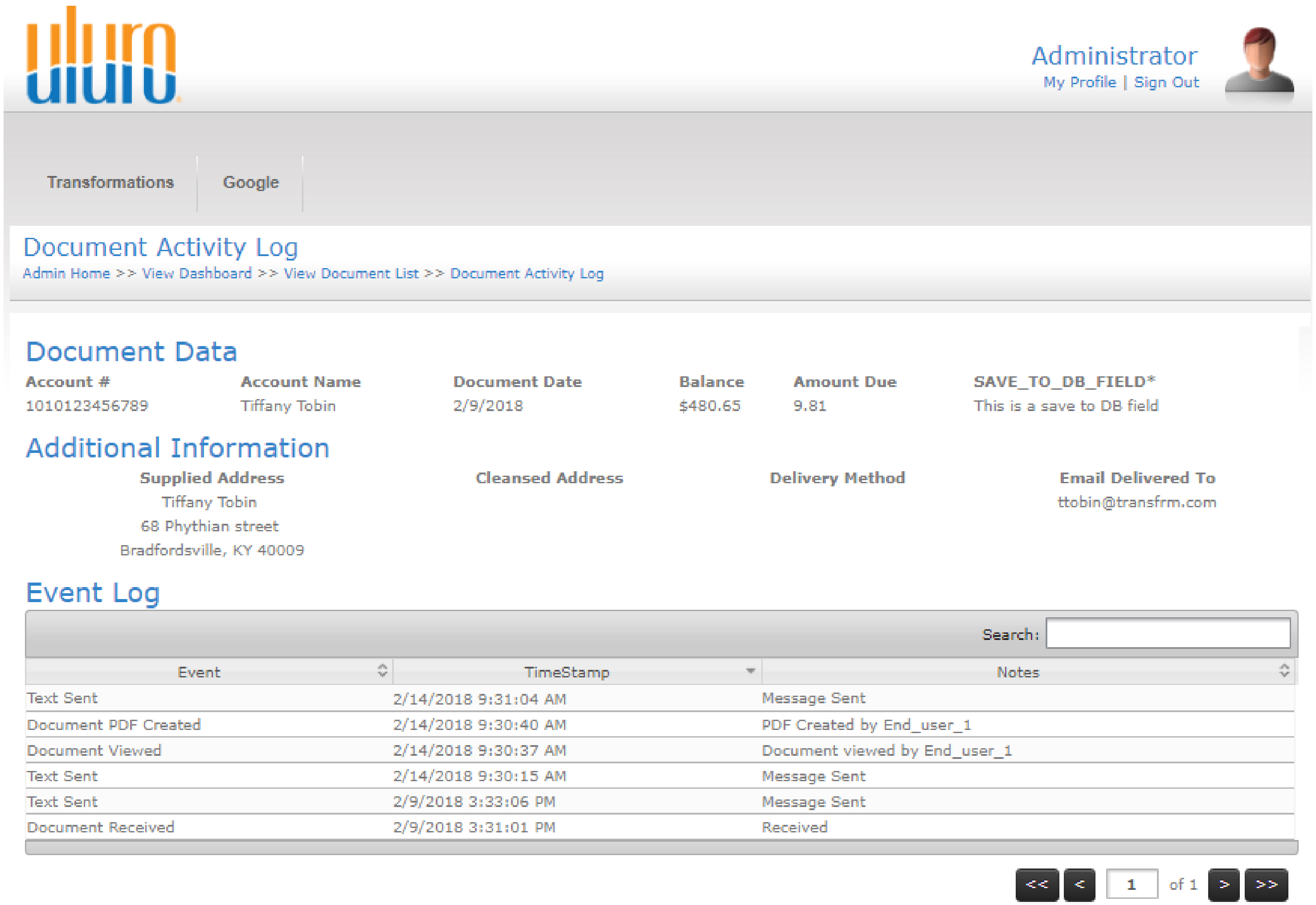
	Account #	Account Name	Document Date	Balance	Amount Due	SAVE_TO_DB_FIELD*	Pay
Activity Log	1010123456789	Tiffany Tobin	2/9/2018	$480.65	9.81	This is a save to DB field	
Activity Log	269275	Clarence Acuna	2/9/2018	$15.82	15.82	This is a save to DB field	
Activity Log	71705	Brionna Abernathy	2/9/2018	$24.83	24.83	This is a save to DB field	
Activity Log	71701	Alex Gregory	2/9/2018	$24.02	24.02	This is a save to DB field	
Activity Log	71698	Matthew Aaron	2/9/2018	$41.00	41.00	This is a save to DB field	
Activity Log	1004	INDUSTRIAL MACHINING	2/9/2018	$-988.81	-988.81	This is a save to DB field	

Click on the Activity Log button.

This will show the activity of the document including the timestamp of each event and by which users.

Events that will be Displayed in the Event Log:

- Document Received
- Document Viewed
- Document Printed
- Document PDF Created
- Document Combined PDF Created
- Email Sent
- Text Sent
- Text Reply Received



External Archive

This allows you to pull an external set of data into the site such as a check image or statement images. The requests are processed for the date range specified, calling a defined URL with parameters.

Archive Type – Select Check or Statement depending on the image you are retrieving from the archive call.

Active – Check this to enable; Uncheck to disable.

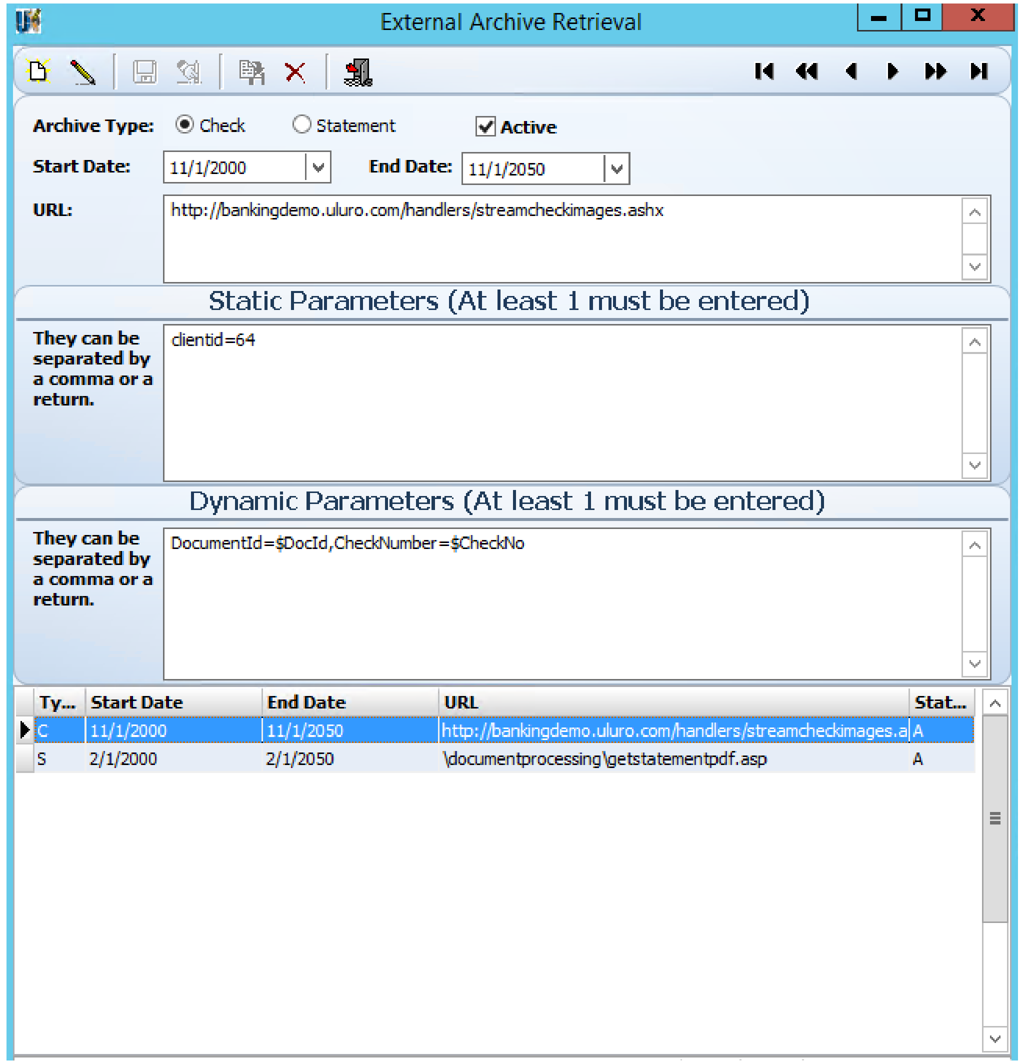
Start Date – Statements with a statement date before this date will not use this archive call.

End Date – End date for use of this archive. Statements with statement date after this date will not use this archive call.

URL – Enter the URL that will be called to retrieve the image

Static Parameters – Comma separated list of static parameters to pass to the archive call. The list will be value pairs with parametername=parametervalue

Dynamic Parameters - Comma separated list of dynamic parameters to pass to the archive call. The list will be value pairs with parametername=parametervalue. Parametervalue may contain variables in the form of <#varname>.

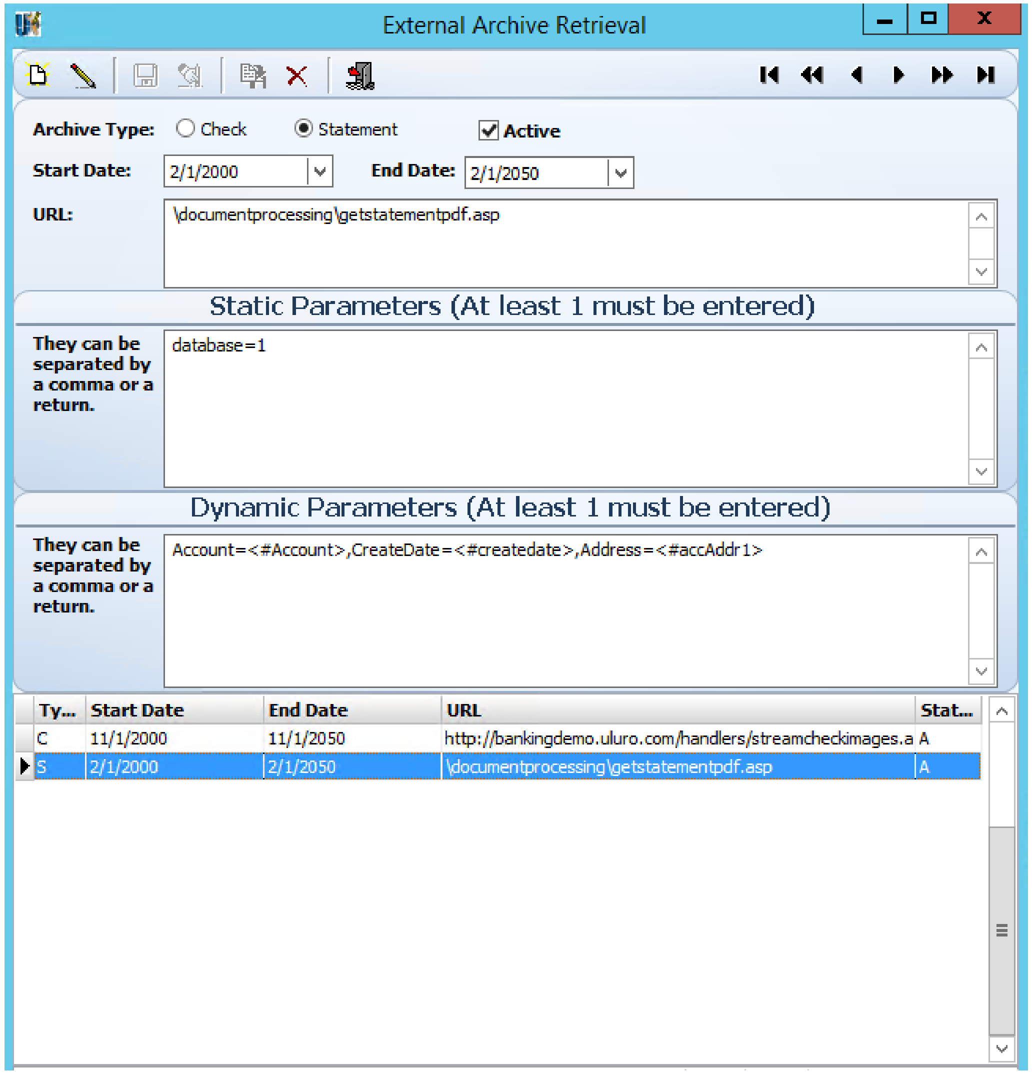


During the call the <#varname> will be replaced with the corresponding information from the Documents table or the User Defined fields (save to DB Fields) for the document requested. If an image is returned the image will be displayed. If a PDF is returned then the PDF will be displayed.

If an external archive is called, then the PDF button (on StatementProcessing.aspx) or View as PDF (on ImageProcessing.aspx) will not be displayed.

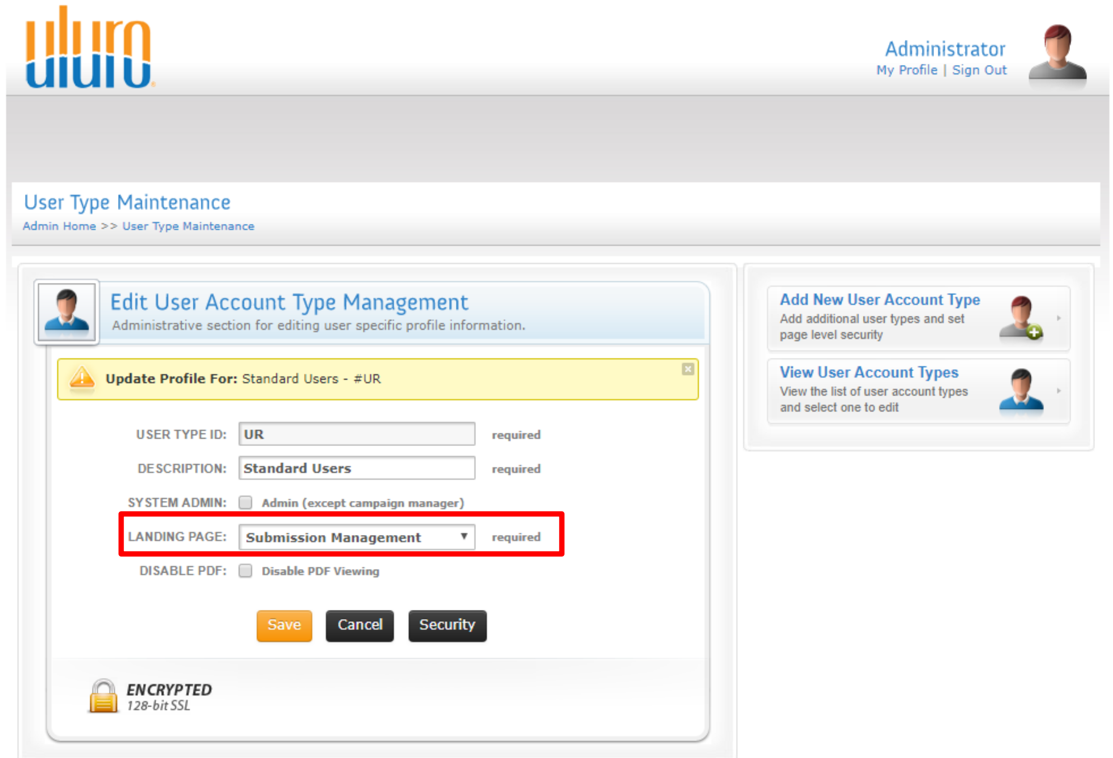
The information for calling the External Archive must be obtained from data mapped through uCompose and processed into Uluro. In uCompose, all information needed to identify a check or statement should be mapped and saved to the database using either the Field Save to DB checkbox (for Statement retrieval) or Check Image HTML link (for check images).

For check images there will be a finite set of values. These will be TransNo, Checkno, Postdate, Accountno, Amount, Accttype, routeno.



Setup for the Web User

Set the landing page on the Usertype to Submission Management.



Click on the Security button to select the security pages.

Check all for the following (View and Submit):

- Image Processing
- Submission Management
- View Statements PDF
- View Statements
- View Transaction Image
- View Transaction Images List
- View PDF
- Reconcile

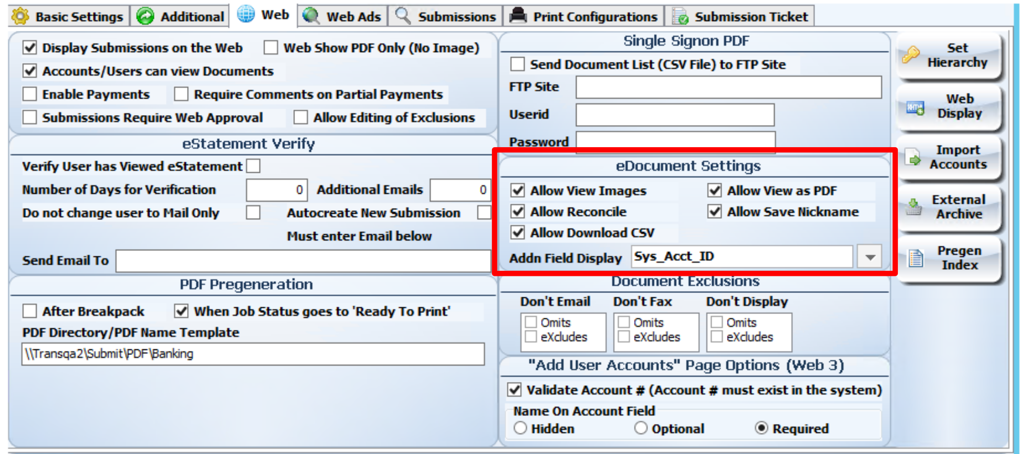
When the user Logs in they will see a different screen.

The submission management page displays all account links to that user.

This will list the different document types that are available. The Name of the document type is the submission type description set in uSetup.

The account is the user's account number.

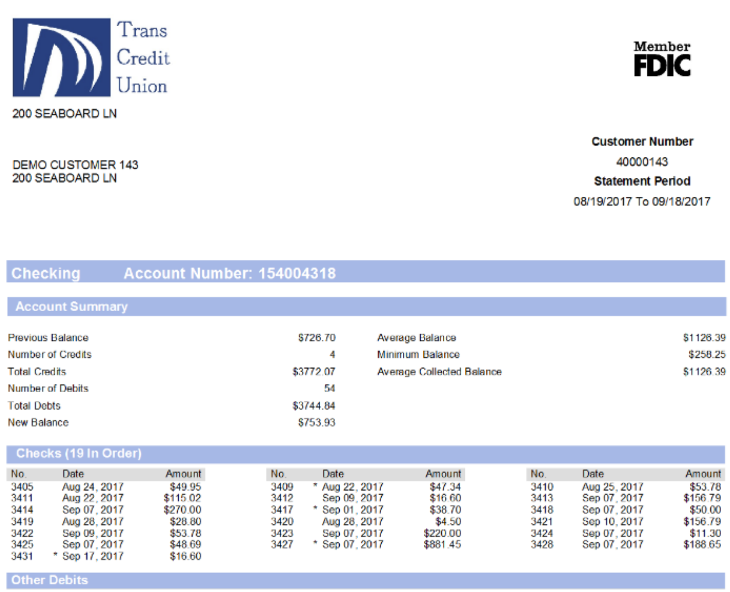
The nickname is not set by default. The user may set the nickname if allowed in uSetup under the web tab for that submission type.



Allow View Images – This will display the View Images button.

Allow Reconcile – This will display the Reconcile button.

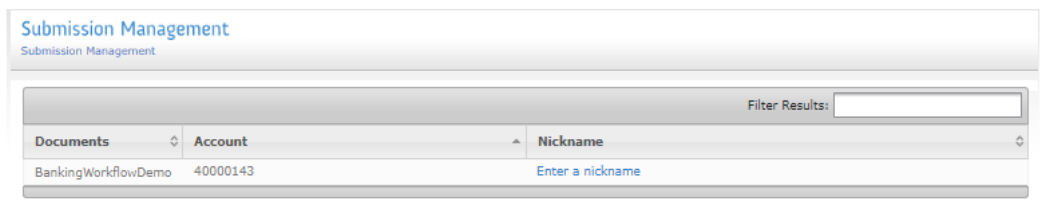
Allow Download CSV – This will display the Download as CSV button. If clicked, the data fields setup in the map for the CSV file will be downloaded as a CSV file.



Allow View as PDF – This will display the View as PDF button. If clicked, the PDF of the document will be displayed in a new window,

Allow Save Nickname – This will display the Save Nickname button and the field to the left where the new nickname can be entered.

Once you enter a nickname and click the Save Nickname button, the nickname will be displayed on the submission management page.

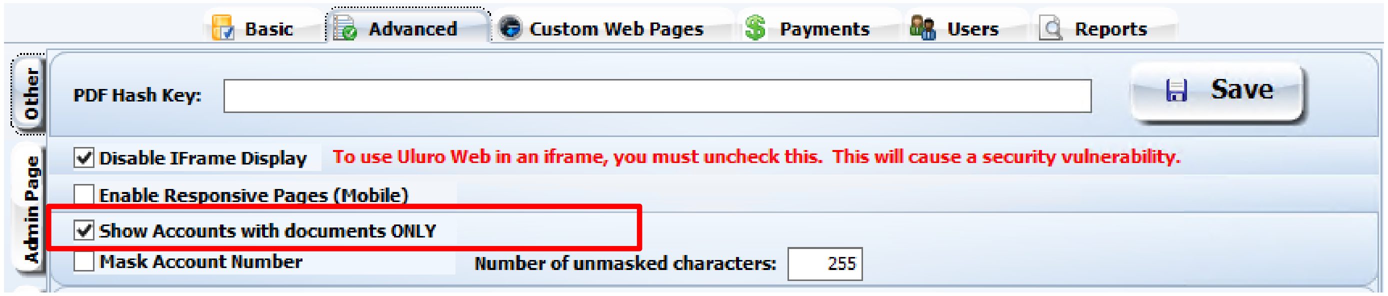


Addn Field Display – The field selected here will display next to the date in the dropdown. The dropdown is how users will select which document for the account to view. This can be a save to DB field or a system field.

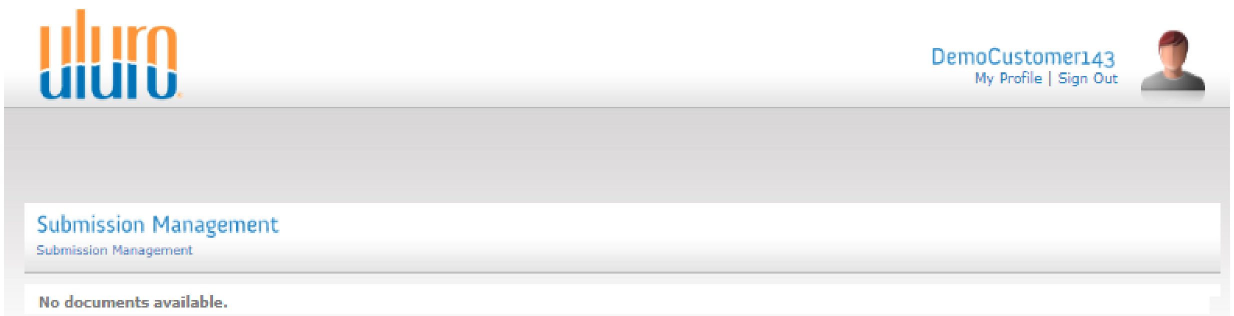
Show Accounts with Documents Only

This setting applies only to the submission management page for end users within the Banking Workflow.

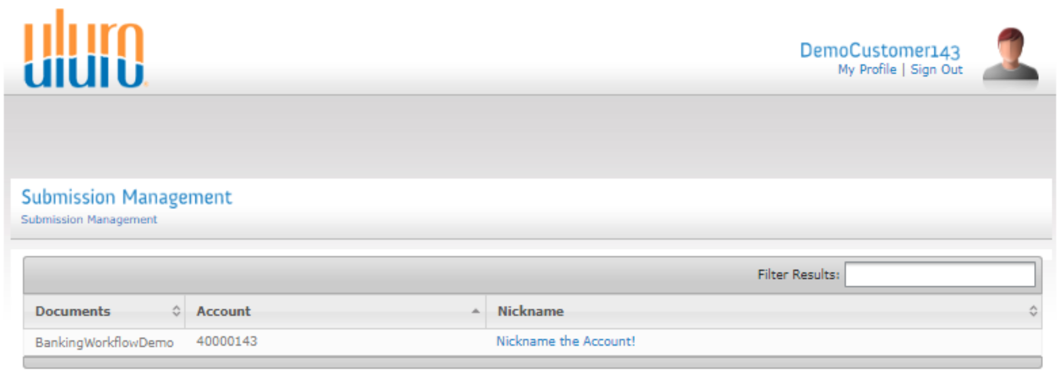
This can be enabled/disabled within the client's web setup.



If this is checked, the user will not see accounts that have no documents.



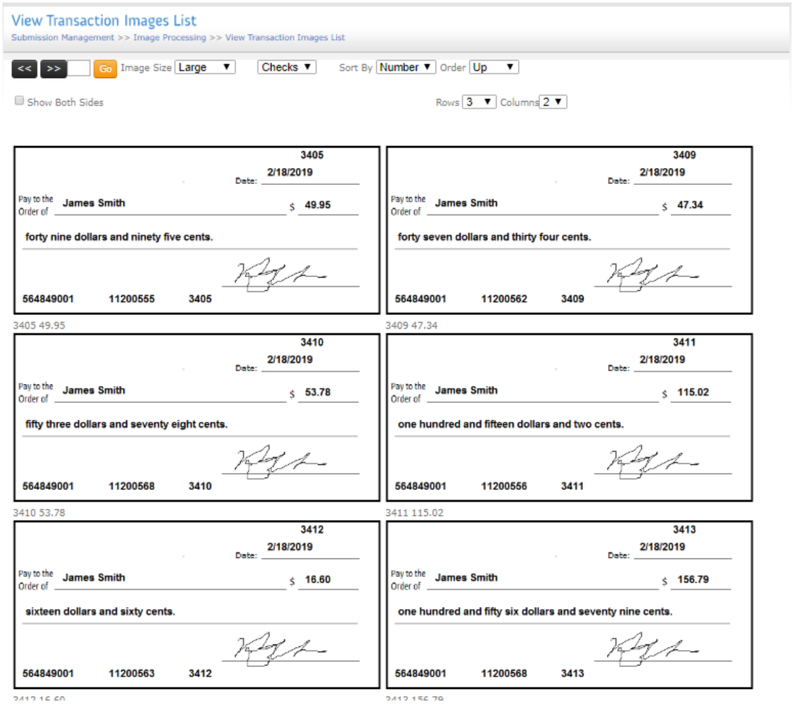
If this is unchecked, the user will still see the list of accounts.



If a user has one of more documents associated with an account, once the account is selected, those documents will be available to select within the dropdown on the next screen.

View Check Images

Clicking on View Image displays the Check Image. This information must be setup in the map.



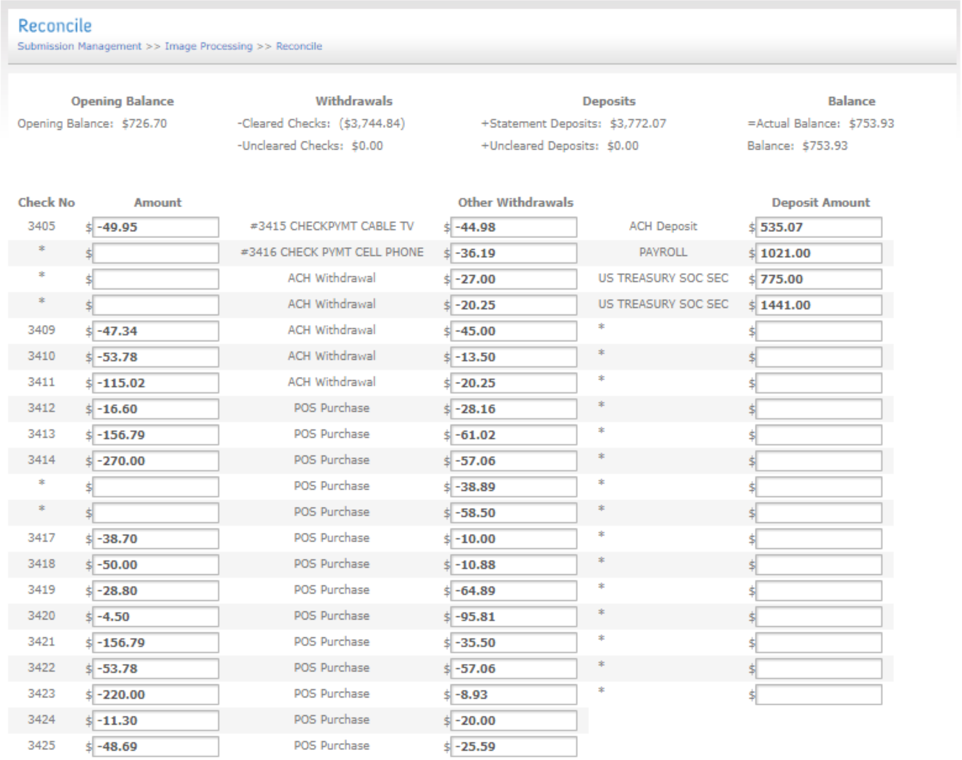
View Reconcile

Click Reconcile to view the Reconcile page. This information must be setup in the map.

This shows a list of the Checks, Withdrawals, and deposits for the document.

Missing items are displayed with *. The user can enter values into these areas and the balances across the top will change.

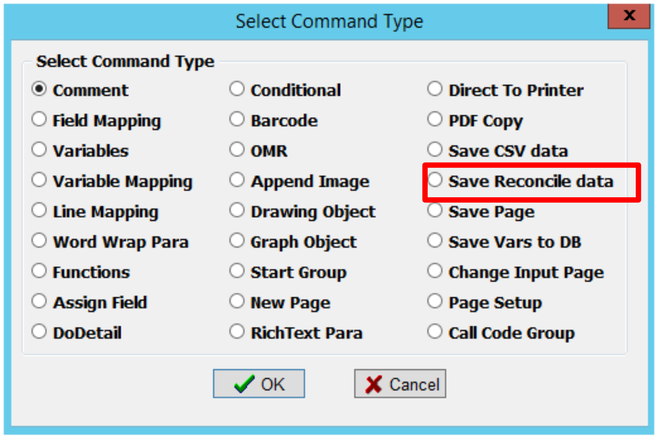
The Reconcile page cannot be saved.



Check No	Amount		Other Withdrawals		Deposit Amount
3405	-49.95	#3415 CHECKPYMT CABLE TV	-44.98	ACH Deposit	535.07
*		#3416 CHECK PYMT CELL PHONE	-36.19	PAYROLL	1021.00
*		ACH Withdrawal	-27.00	US TREASURY SOC SEC	775.00
*		ACH Withdrawal	-20.25	US TREASURY SOC SEC	1441.00
3409	-47.34	ACH Withdrawal	-45.00	*	
3410	-53.78	ACH Withdrawal	-13.50	*	
3411	-115.02	ACH Withdrawal	-20.25	*	
3412	-16.60	POS Purchase	-28.16	*	
3413	-156.79	POS Purchase	-61.02	*	
3414	-270.00	POS Purchase	-57.06	*	
*		POS Purchase	-38.89	*	
*		POS Purchase	-58.50	*	
3417	-38.70	POS Purchase	-10.00	*	
3418	-50.00	POS Purchase	-10.88	*	
3419	-28.80	POS Purchase	-64.89	*	
3420	-4.50	POS Purchase	-95.81	*	
3421	-156.79	POS Purchase	-35.50	*	
3422	-53.78	POS Purchase	-57.06	*	
3423	-220.00	POS Purchase	-8.93	*	
3424	-11.30	POS Purchase	-20.00		
3425	-48.69	POS Purchase	-25.59		

Map Commands - Reconcile

To setup the reconcile information in the map, select the Save Reconcile Data command.



For Reconciliation there are 6 Types of Transactions currently defined.

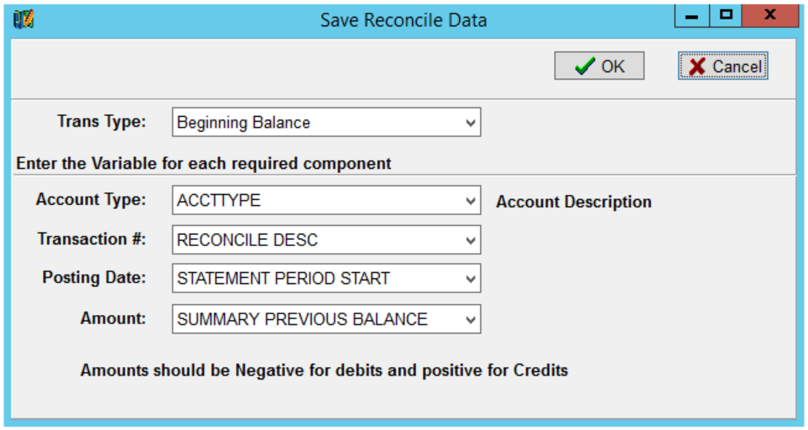
Beginning Balance
Ending Balance
Check
Withdraw
Interest
Adjustment

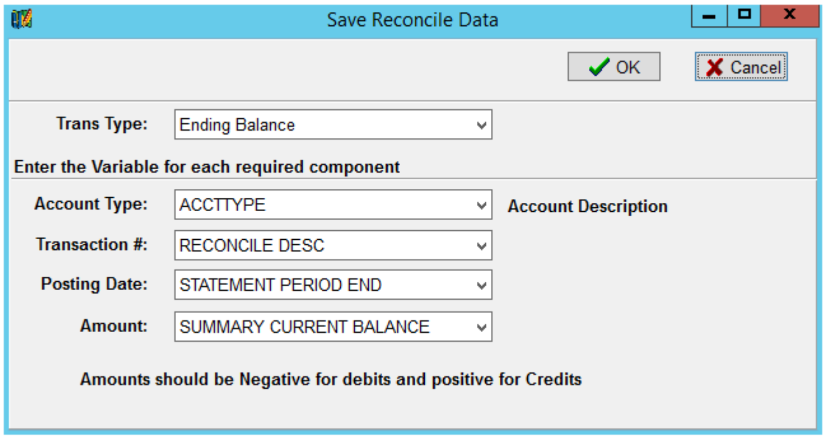
Account Type should define the description of the Account. An example would be Checking, Saving, Money Market, etc.

Transaction # should be some identifying information for the Transaction. This could be check number or description of the Transaction. As an example in the Beginning Balance Trans Type this could be the text "Beginning Balance".

Posting Date should be the date of the Transaction was posted. For Beginning Balance this could be the date of the last statement.

Amount should be the amount of the Transaction. For Debits this should be negative. For Credits this should be positive.

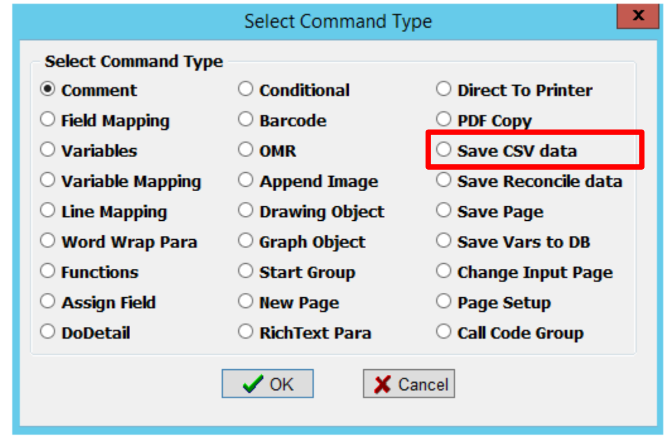




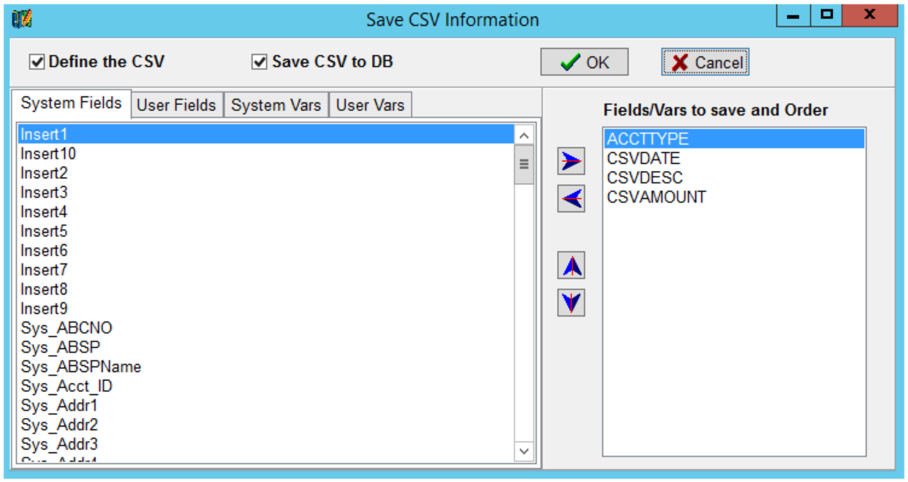
Place the Save Reconcile Data commands at points in the Map as desired. The Reconcile data will be saved during Breakpack with the values of the variables at the time the command is executed.

Map Commands – Download CSV File

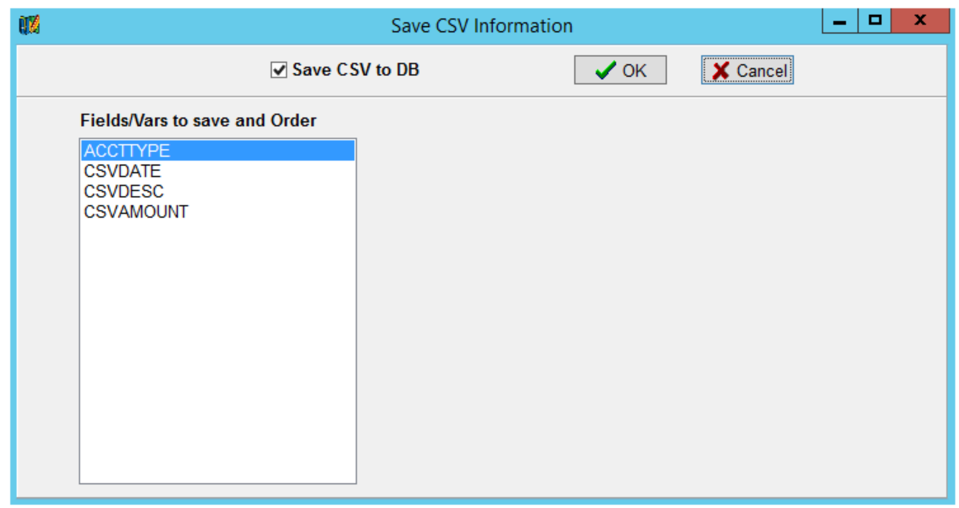
To setup the information that will be exported in a CSV file, select the Save CSV Data command.



Select the Fields and Variables by using the arrows to move them to the Right window:



If you need to save the values stored in those fields/variables later in the map, add the same command again. This time it will let you save those previously selected variables and fields.



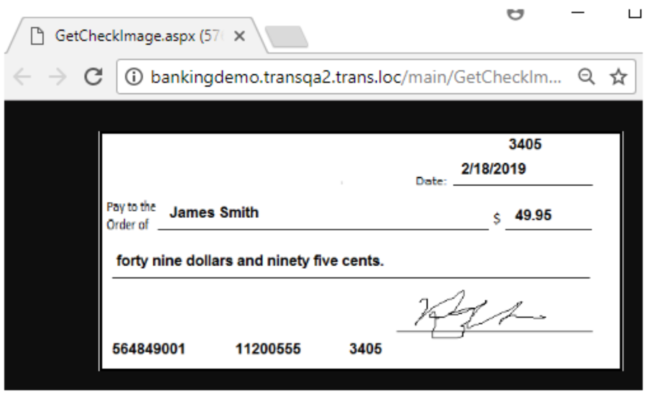
Sample CSV file:

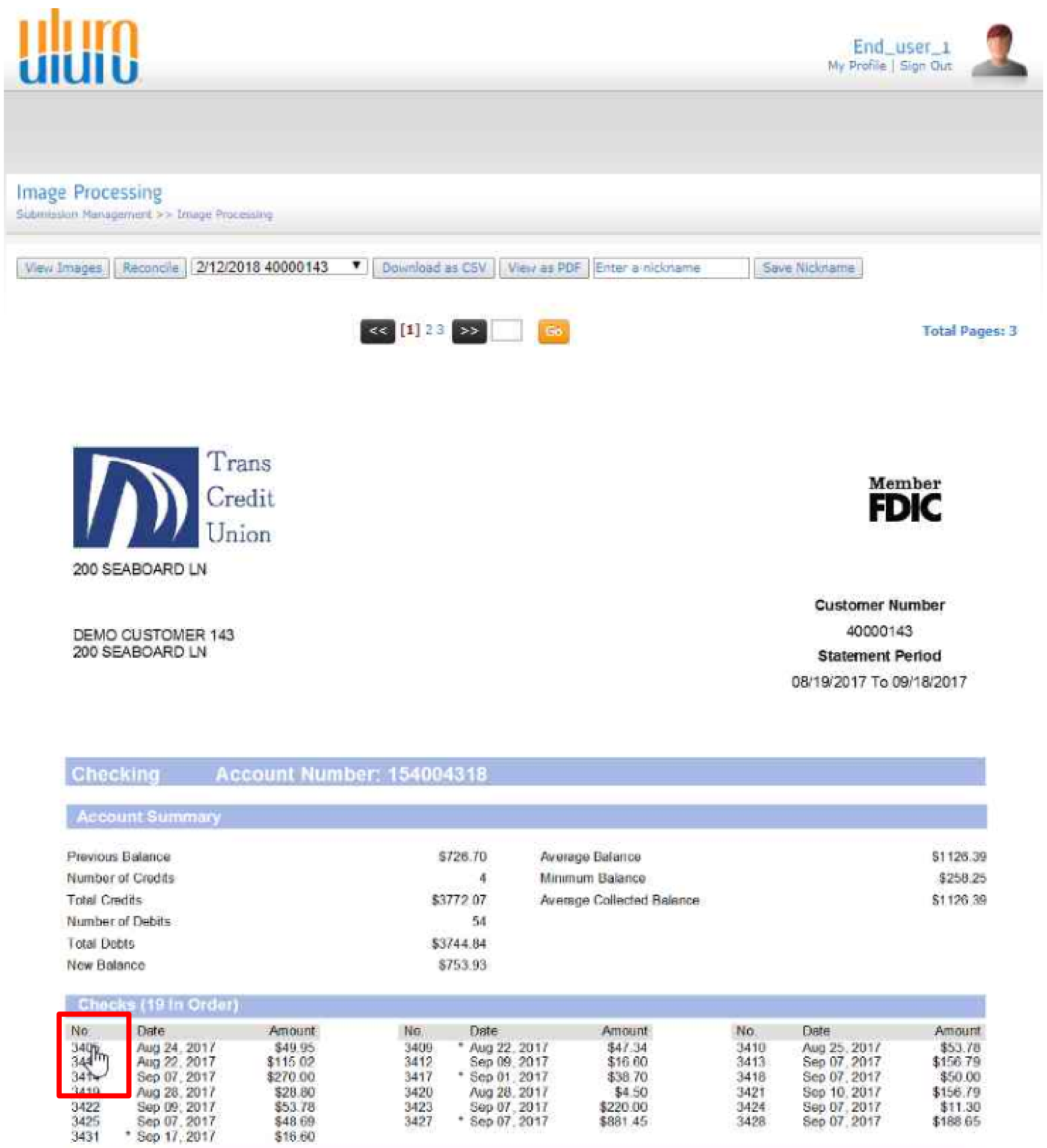
1				
2	ACCTTYPE	CSVDATE	CSVDESC	CSVAMOUNT
3	Checking	8/19/2017	Beginning Balance	726.7
4	Checking	8/22/2017	Check 3409	-47.34
5	Checking	8/22/2017	Check 3411	-115.02
6	Checking	8/24/2017	Check 3405	-49.95

Check Image display

If Check images are enabled on the submission type in uSetup and in the Map then putting the Cursor over the Check No will display a hand Icon over the check.

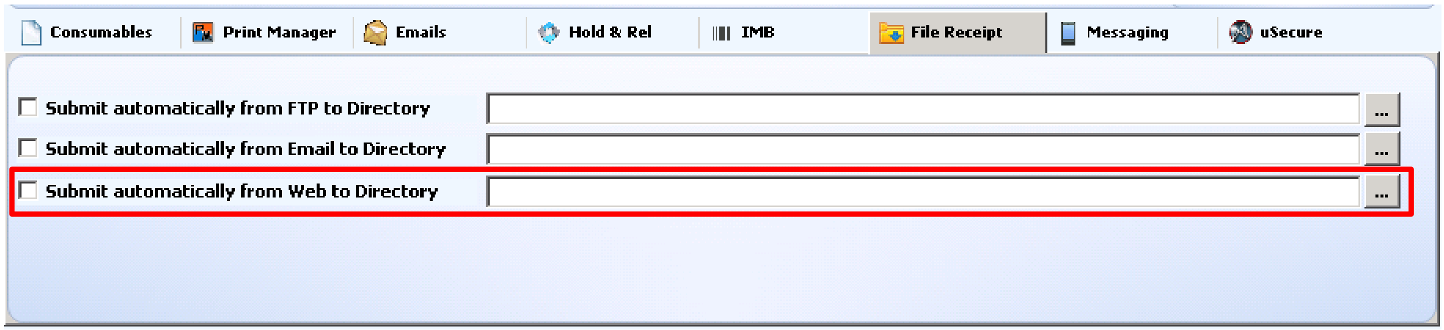
Clicking on the Check no will display a new page with the Check Image





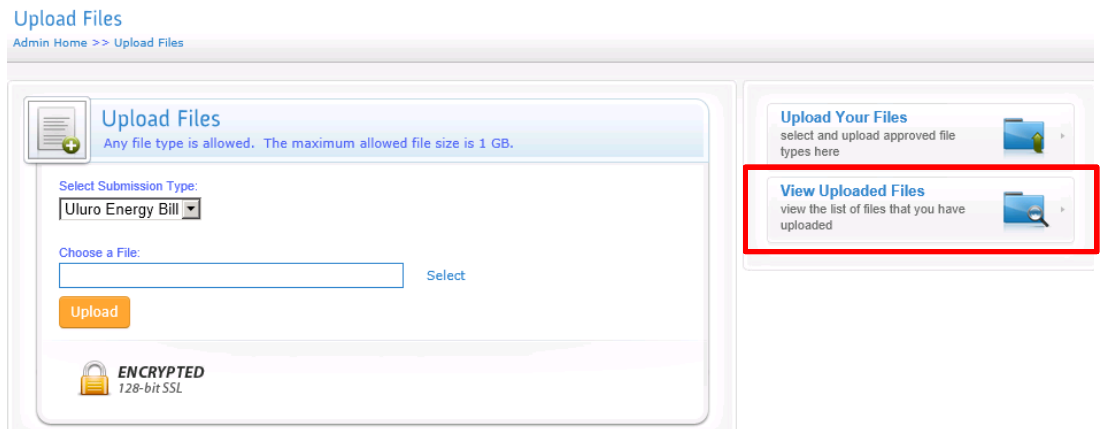
Upload Files (Web FTP)

For an admin user to be able to upload a data file for a Submission type, the Web directory for that submission type must be filled in and enabled by checking the box under the File Receipt tab in the submission type.

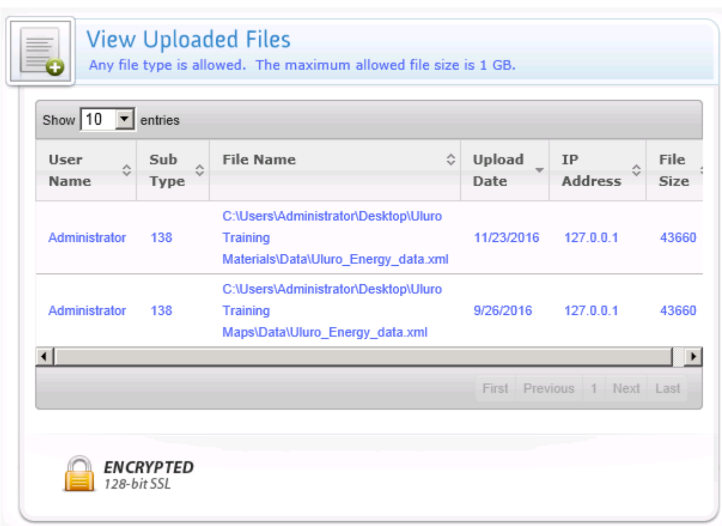


Each submission type must have a unique Web directory location that begins with \\server\Submit\Web\.

Once the file has been uploaded, it will go to this web diretory to be picked up by Uluro, thus creating a Submission.



The user will select from all of the submission types with a Web directory for that client/site.



Click Select to search for the data file. The file being uploaded has a max size of 1 GB (1024 MB). Once a file has been choosen, click Upload.

The user can see their uploades under View Uploaded Files.

Web Approval

Once a submission has run through Breakpack, the submission can enter Awaiting Approval status which requires an admin user to approve the Submission on the web before it can continue through to become a job and be printed.

This is enabled at the Submission level under the web tab within the Submission type.

Display Submissions on the Web – This must be checked for documents from this submission to be viewed by an admin user in the Web Proofing, Dashboard, or Search records.

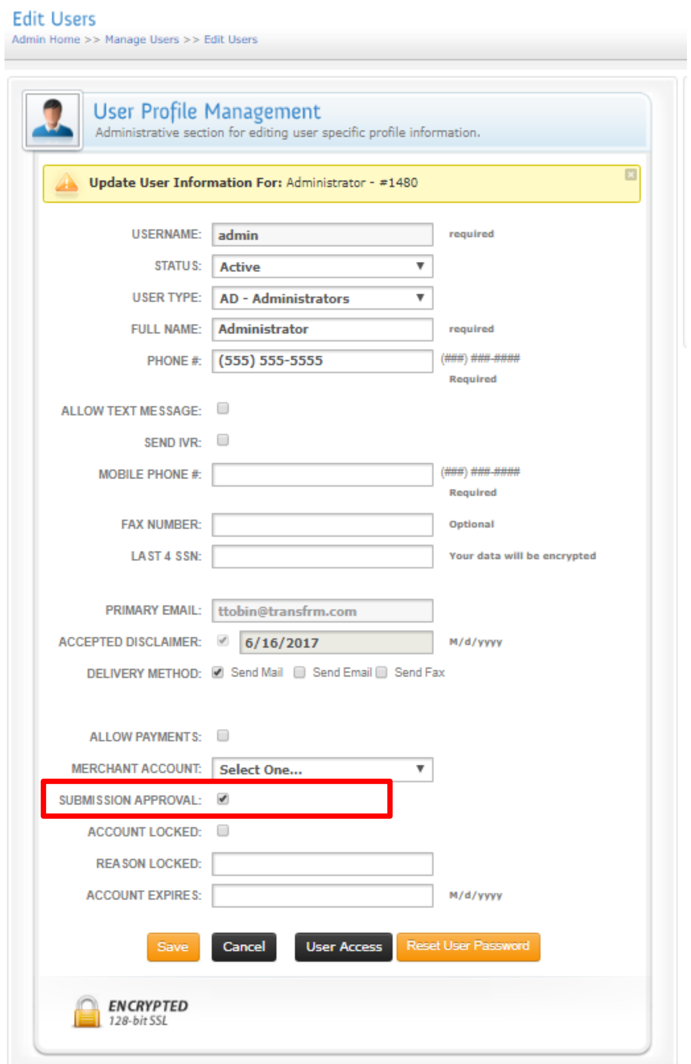
Submissions Require Web Approval – If this is checked, the submission will stop in Awaiting Approval status until an admin views the Submission and approves/rejects it.

To give an admin user the ability to approve a submission, select the admin user under Manage Users. Check Submission Approval under their Profile Management.

The admin user will see submissions that are in Awaiting Approval status under Web Approval. Once the Submission is approved, the admin user can view the progress within the Dashboard.

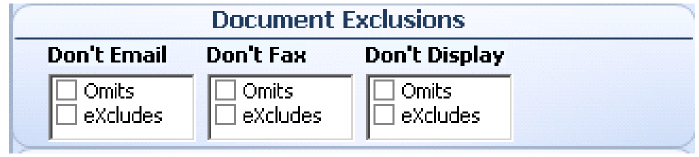
Allow Editing of Exclusions – If this is checked, then the Mail Type column will be have a dropdown list of the exclusion options. This allows the admin user the ability to manually change documents to be excluded as No Mail, Exclude, or Omit.

Web Show PDF Only (No Image) – turns off PNGs on the web for this submission type. Most documents generate a PNG of the document as their default way of viewing the documents (they still have a button/option to view it as a PDF as well). If this is checked the default for viewing the document becomes a PDF, nothing else. This setting will only apply to the Dashboard and Web Proofing pages for the admin user.



Document Exclusions

These are the behavior settings for exclusions.

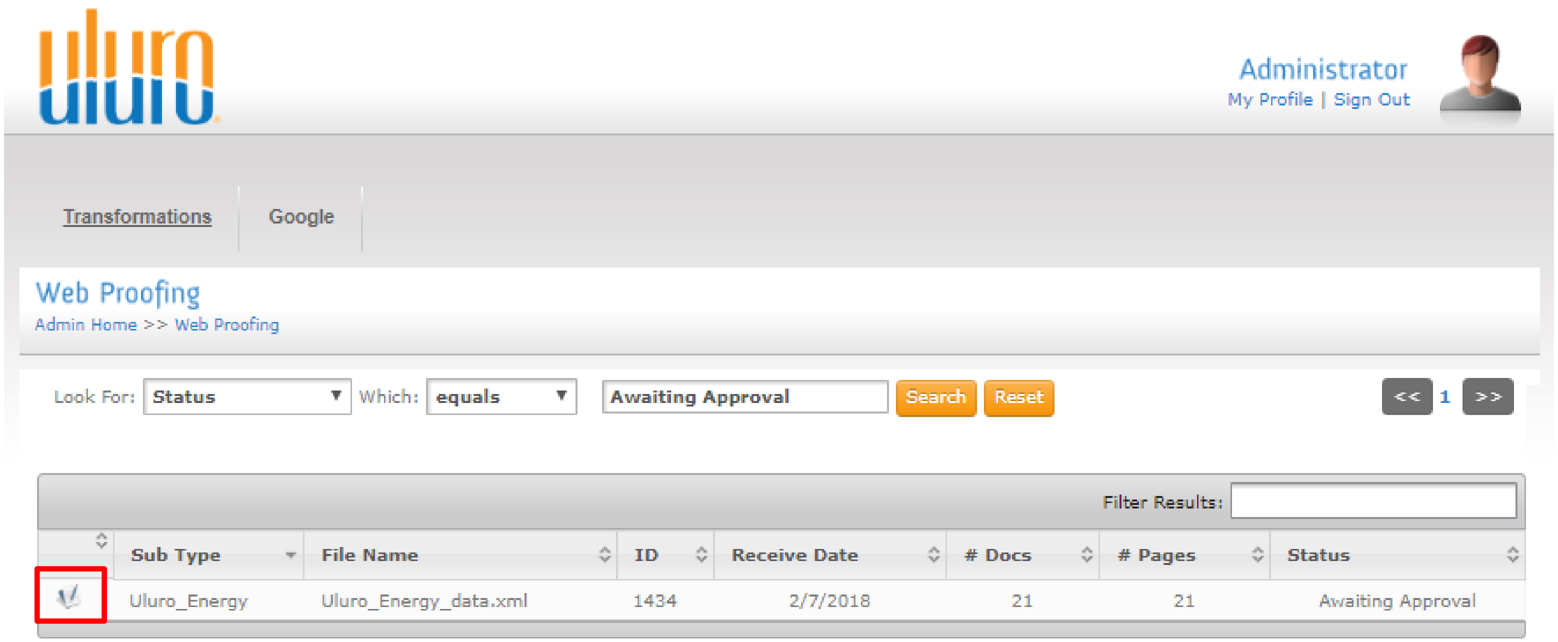


For users that are receiving their documents by email/fax, if their document was marked as Omit or Exclude, then they will not receive an email/fax.

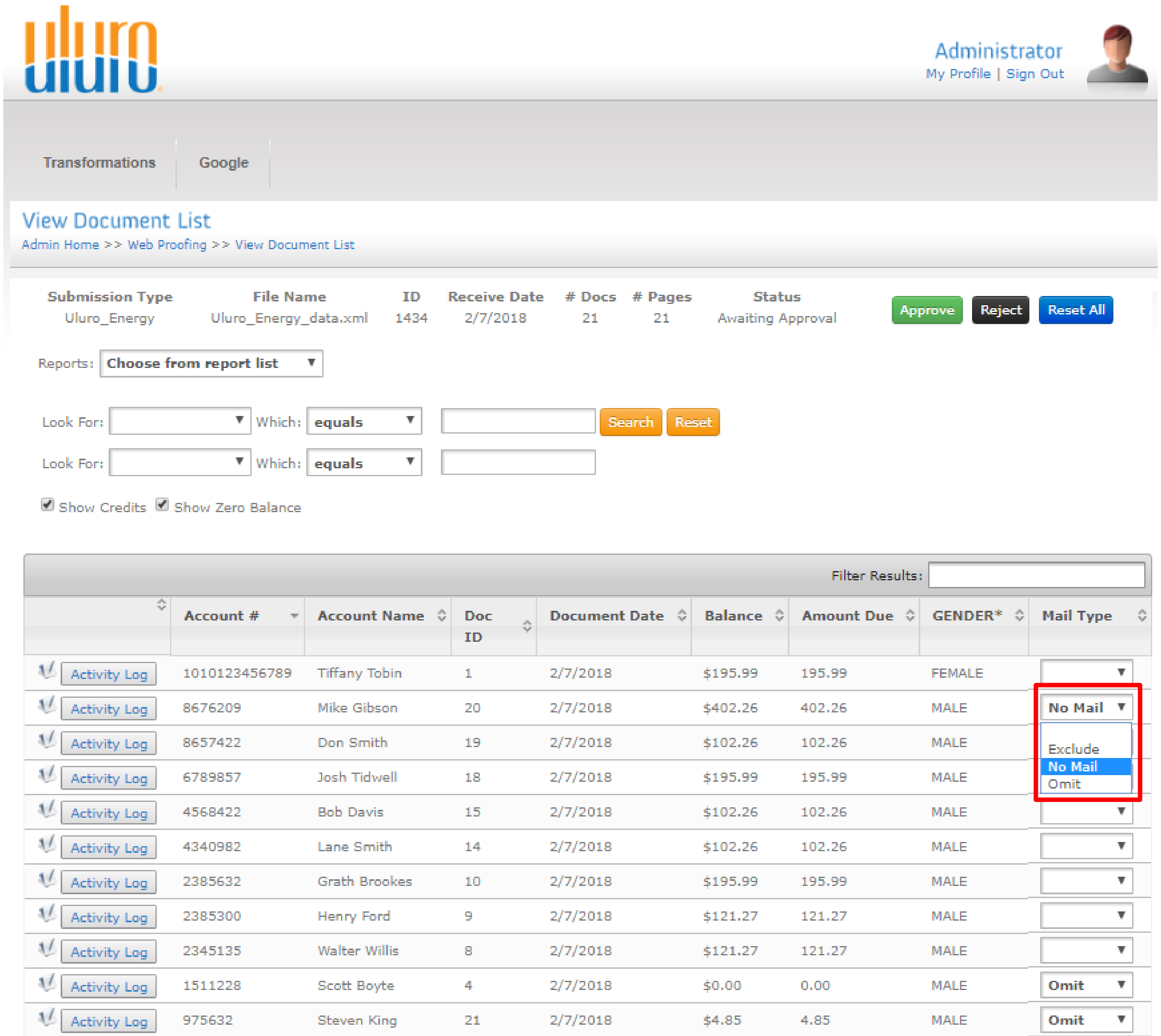
Don’t Display wil not display documents marked as Omit or Exclude for Web Approval or the document list within the submission in the Web Dashboard.

Standard users will see their document on the User Main page regarless of these settings.

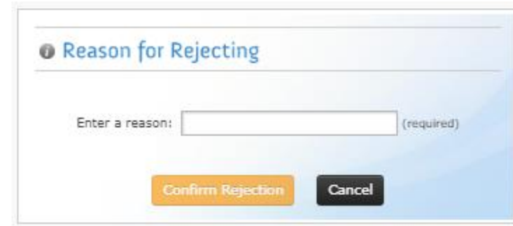
Once a submission is in Awaiting Approval status, that submission will appear under Web Proofing, within the Admin Main page options. Select the submission to see the documents and to approve/reject the submission.



The admin user can view each of the documents, override the Mail type for any document, then decide to Approve or Reject the submission. To approve click the Approve button. To reject the submission click the Reject button.

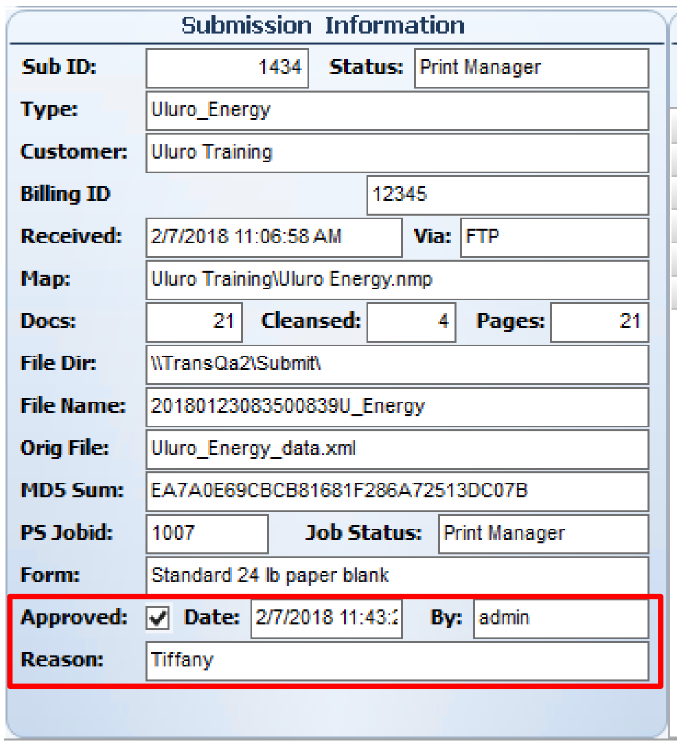


Whether it was approved or rejected, that information will be logged. If it is rejected, another data file will need to be submitted to process the submiisson or you can resubmit from uControl.

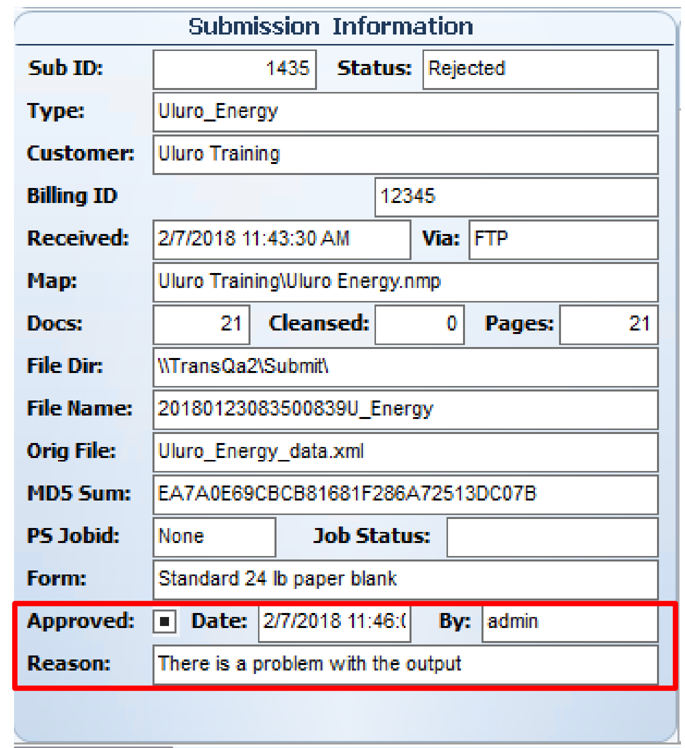


If you double clik on a submission is uControl (or uSetup under the submission tab within the submission type), the submission Transaction details display if the record was approved or rejected. The user and name/reason will be logged with a timestamp.

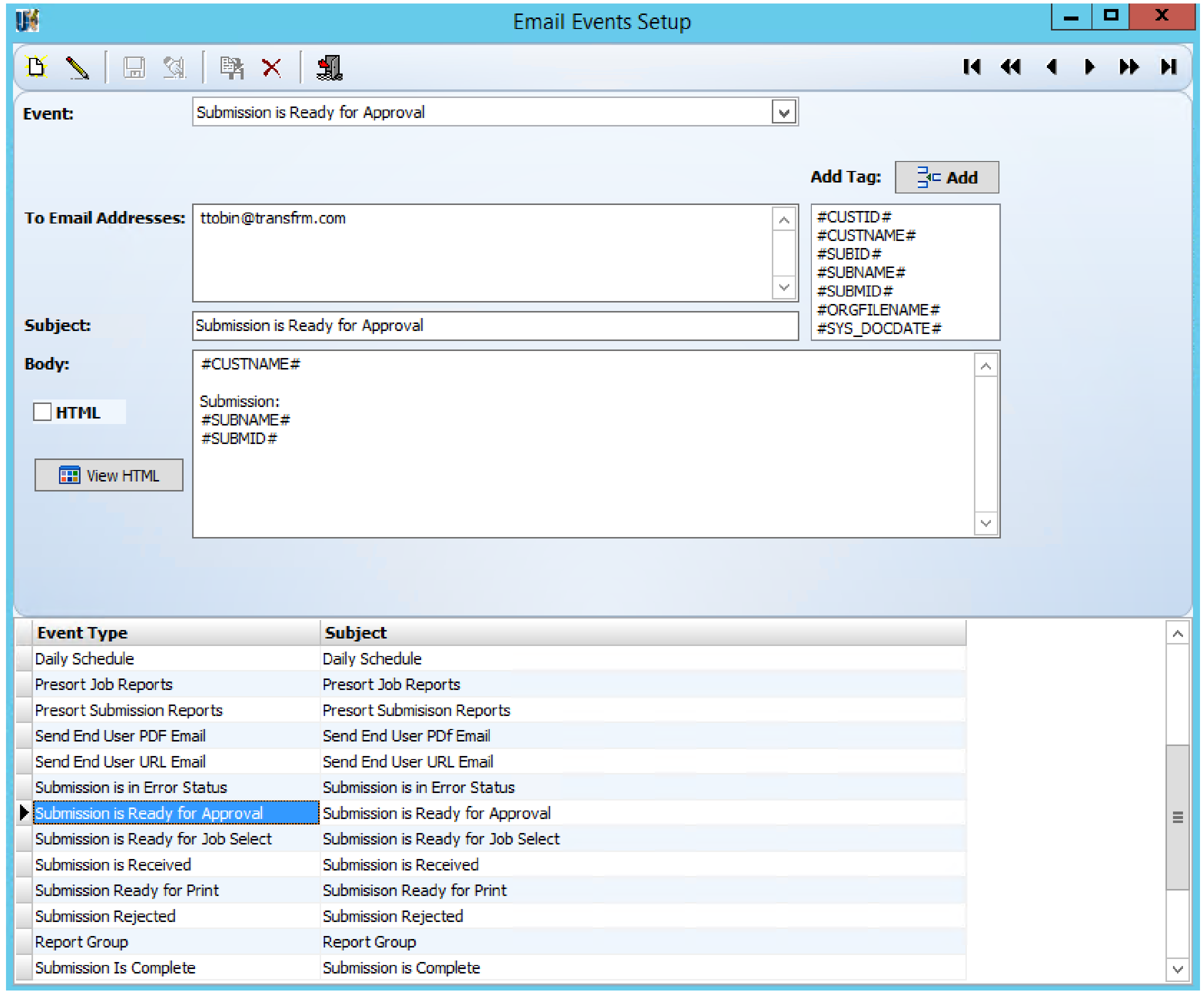
Sample of an approved submission:



Sample of a rejected submission:



Submission is Ready for Approval Email Event



To create a new email event, click the new button.

Event – Select Submission is Ready for Approval

To Email Addresses – Enter the email addresses of those needing to receive this email event. If multiple emails, use a semicolon as the delimiter.

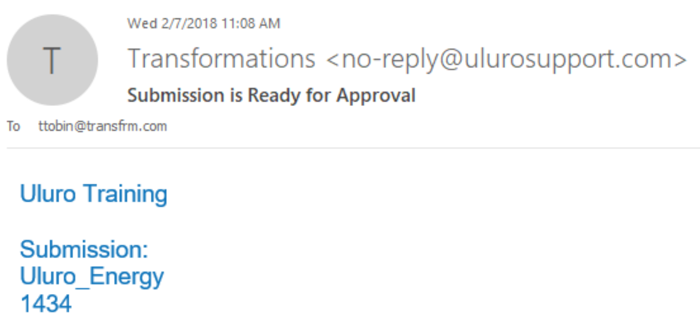
Subject – Enter the text that will be displayed as the subject line of the email.

Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML** box.

Click the **View HTML** button to preview the email.

Tags – These can be added to the subject line, or the body or the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.

Sample Setup:



Submission is Rejected Email Event

To create a new email event, click the new button.

Event – Select Submission is Ready for Approval

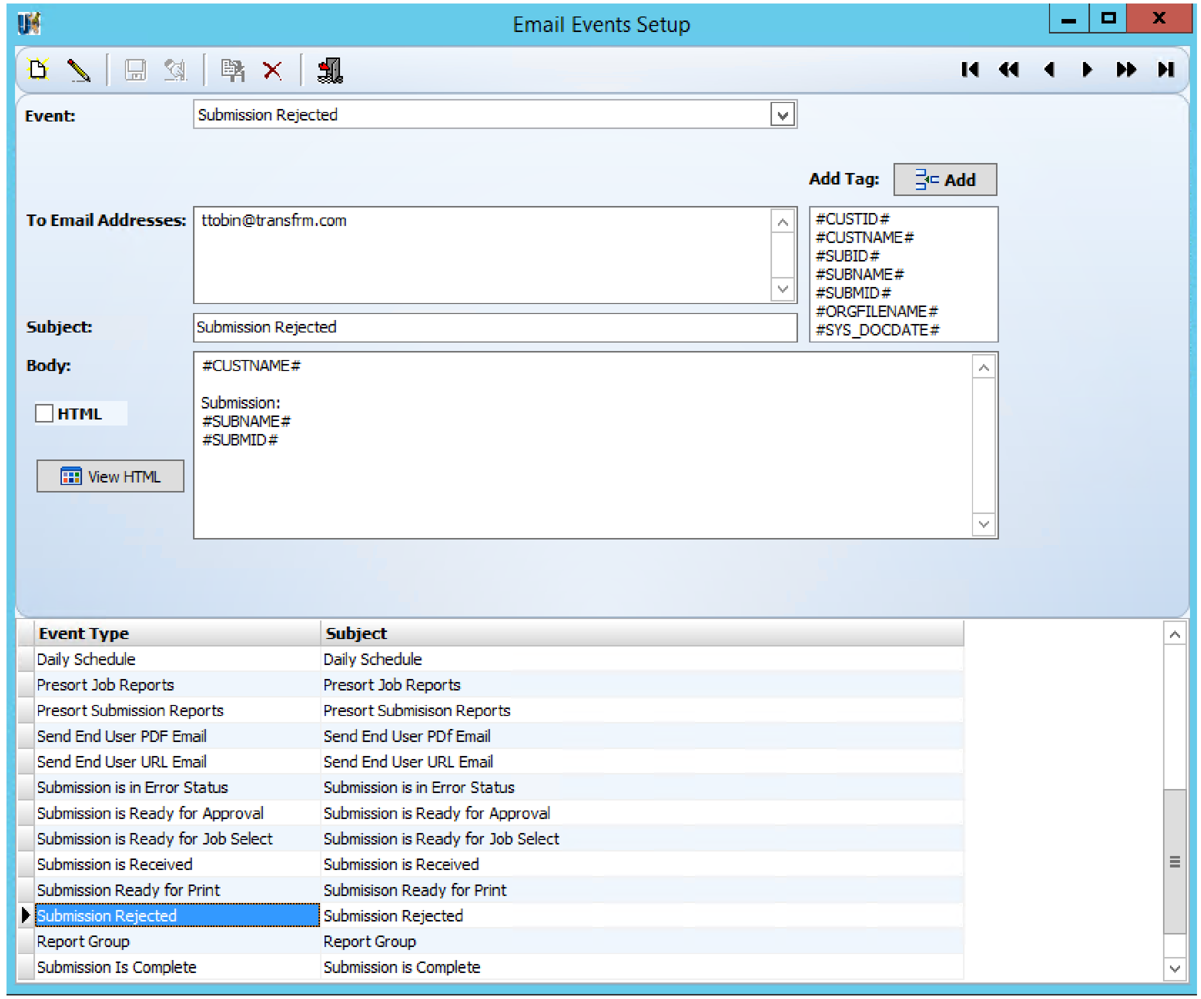
To Email Addresses – Enter the email addresses of those needing to receive this email event. If multiple emails, use a semicolon as the delimiter.

Subject – Enter the text that will be displayed as the subject line of the email.

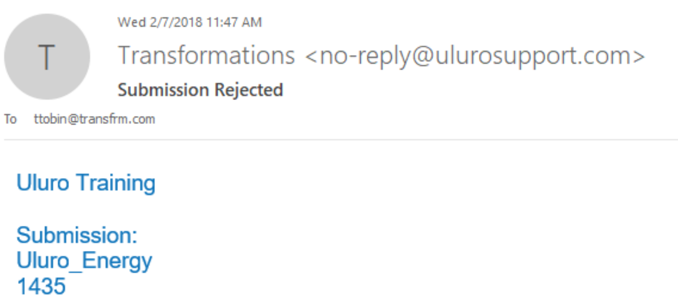
Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML** box.

Click the **View HTML** button to preview the email.

Tags – These can be added to the subject line, or the body or the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.

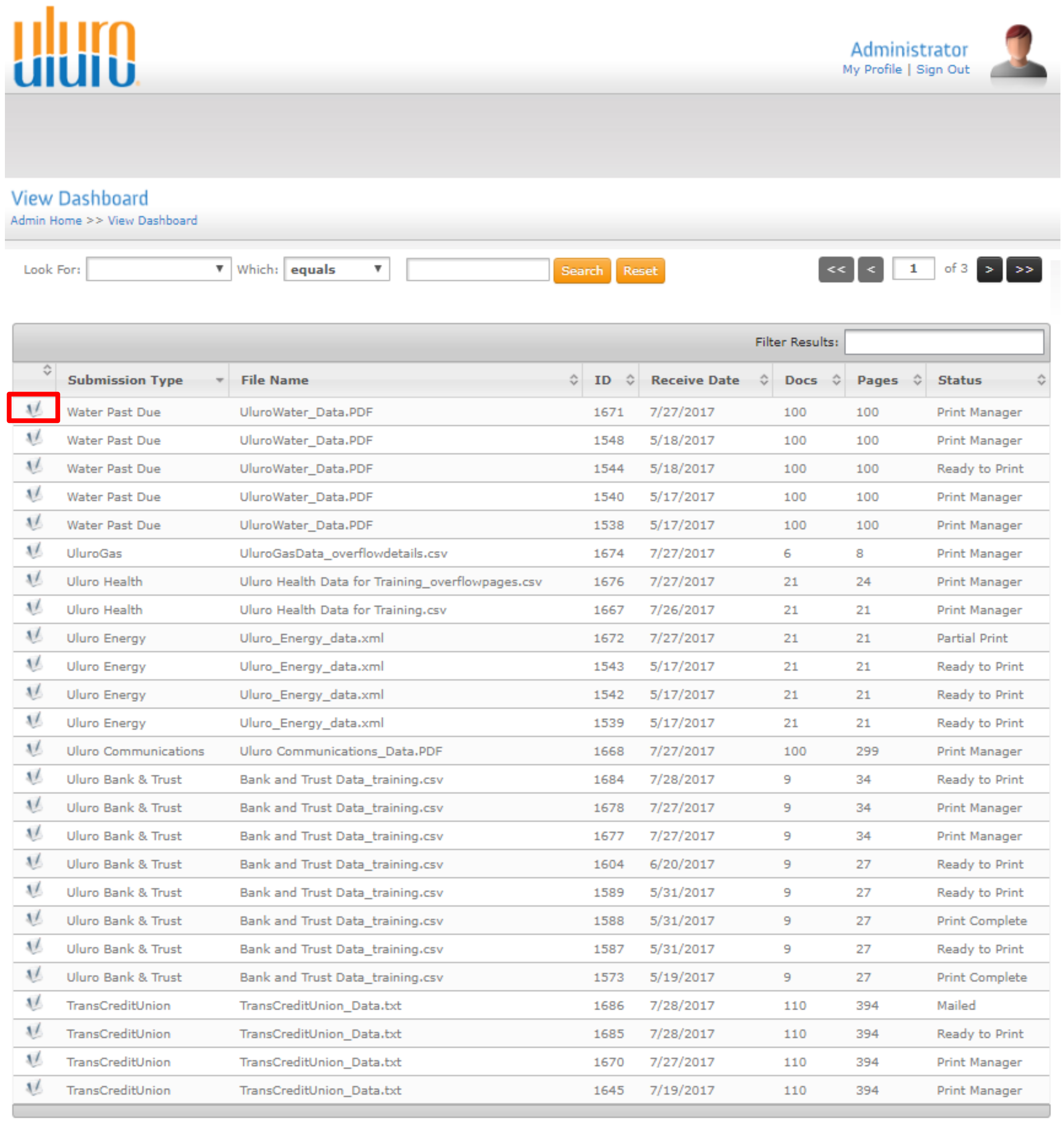


Sample Setup:



Dashboard

All submissions are listed in the Dashboard. Admin users can monitor their status or search for a specific submission.

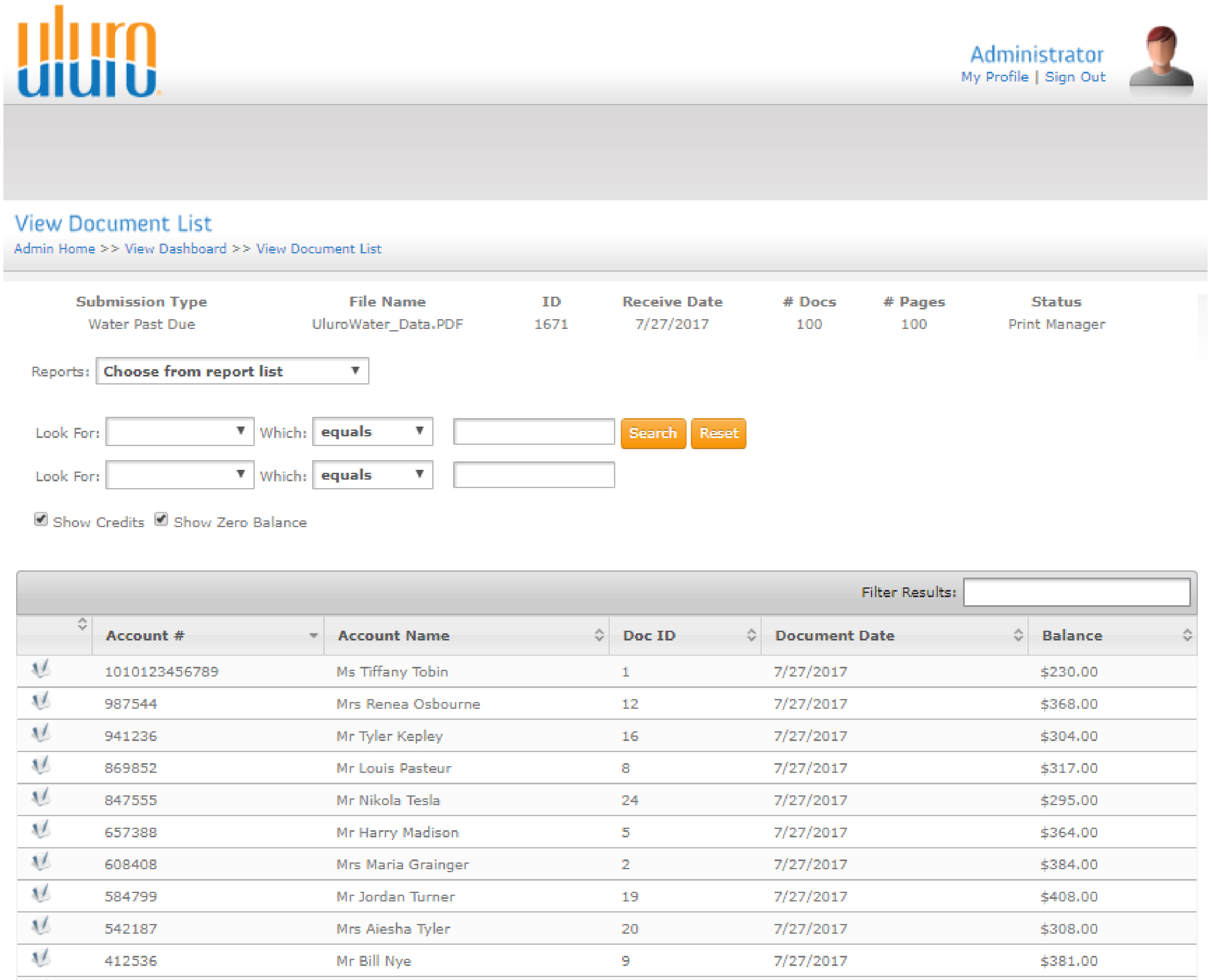


Submission Type	File Name	ID	Receive Date	Docs	Pages	Status
Water Past Due	UluroWater_Data.PDF	1671	7/27/2017	100	100	Print Manager
Water Past Due	UluroWater_Data.PDF	1548	5/18/2017	100	100	Print Manager
Water Past Due	UluroWater_Data.PDF	1544	5/18/2017	100	100	Ready to Print
Water Past Due	UluroWater_Data.PDF	1540	5/17/2017	100	100	Print Manager
Water Past Due	UluroWater_Data.PDF	1538	5/17/2017	100	100	Print Manager
UluroGas	UluroGasData_overflowdetails.csv	1674	7/27/2017	6	8	Print Manager
Uluro Health	Uluro Health Data for Training_overflowpages.csv	1676	7/27/2017	21	24	Print Manager
Uluro Health	Uluro Health Data for Training.csv	1667	7/26/2017	21	21	Print Manager
Uluro Energy	Uluro_Energy_data.xml	1672	7/27/2017	21	21	Partial Print
Uluro Energy	Uluro_Energy_data.xml	1543	5/17/2017	21	21	Ready to Print
Uluro Energy	Uluro_Energy_data.xml	1542	5/17/2017	21	21	Ready to Print
Uluro Energy	Uluro_Energy_data.xml	1539	5/17/2017	21	21	Ready to Print
Uluro Communications	Uluro Communications_Data.PDF	1668	7/27/2017	100	299	Print Manager
Uluro Bank & Trust	Bank and Trust Data_training.csv	1684	7/28/2017	9	34	Ready to Print
Uluro Bank & Trust	Bank and Trust Data_training.csv	1678	7/27/2017	9	34	Print Manager
Uluro Bank & Trust	Bank and Trust Data_training.csv	1677	7/27/2017	9	34	Print Manager
Uluro Bank & Trust	Bank and Trust Data_training.csv	1604	6/20/2017	9	27	Ready to Print
Uluro Bank & Trust	Bank and Trust Data_training.csv	1589	5/31/2017	9	27	Ready to Print
Uluro Bank & Trust	Bank and Trust Data_training.csv	1588	5/31/2017	9	27	Print Complete
Uluro Bank & Trust	Bank and Trust Data_training.csv	1587	5/31/2017	9	27	Ready to Print
Uluro Bank & Trust	Bank and Trust Data_training.csv	1573	5/19/2017	9	27	Print Complete
TransCreditUnion	TransCreditUnion_Data.txt	1686	7/28/2017	110	394	Mailed
TransCreditUnion	TransCreditUnion_Data.txt	1685	7/28/2017	110	394	Ready to Print
TransCreditUnion	TransCreditUnion_Data.txt	1670	7/27/2017	110	394	Print Manager
TransCreditUnion	TransCreditUnion_Data.txt	1645	7/19/2017	110	394	Print Manager

An individual Submission can be selected to view documents, have more search options, or view reports for the Submission.

Tips from Transformations:

Submissions that have been deleted/cancelled manually or using uDelSub.exe will not appear in the Dashboard.

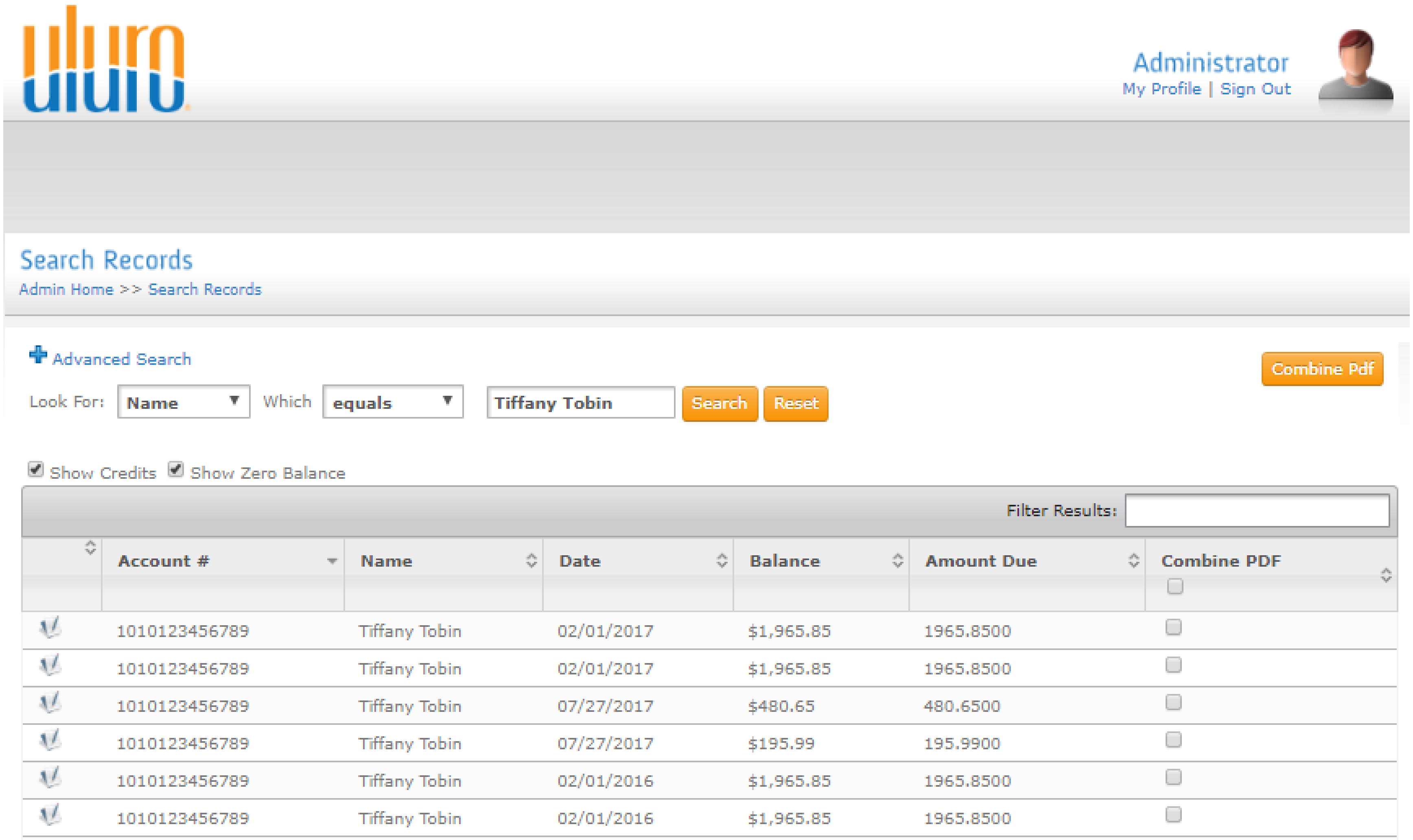


The Reports dropdown menu will list the Autoprint Reports that have been generated for this submission/job.

Since admin users view is always at the submission level, only information pertaining to that submission will be on the reports. Complete Job and print level reports that contain information about multiple submissions must be accessed elsewhere.

Search Records

This is used by admin/CSR users to find documents based on various search criteria. These columns and search criteria can be customized including adding save to DB fields, using the Web Display settings.



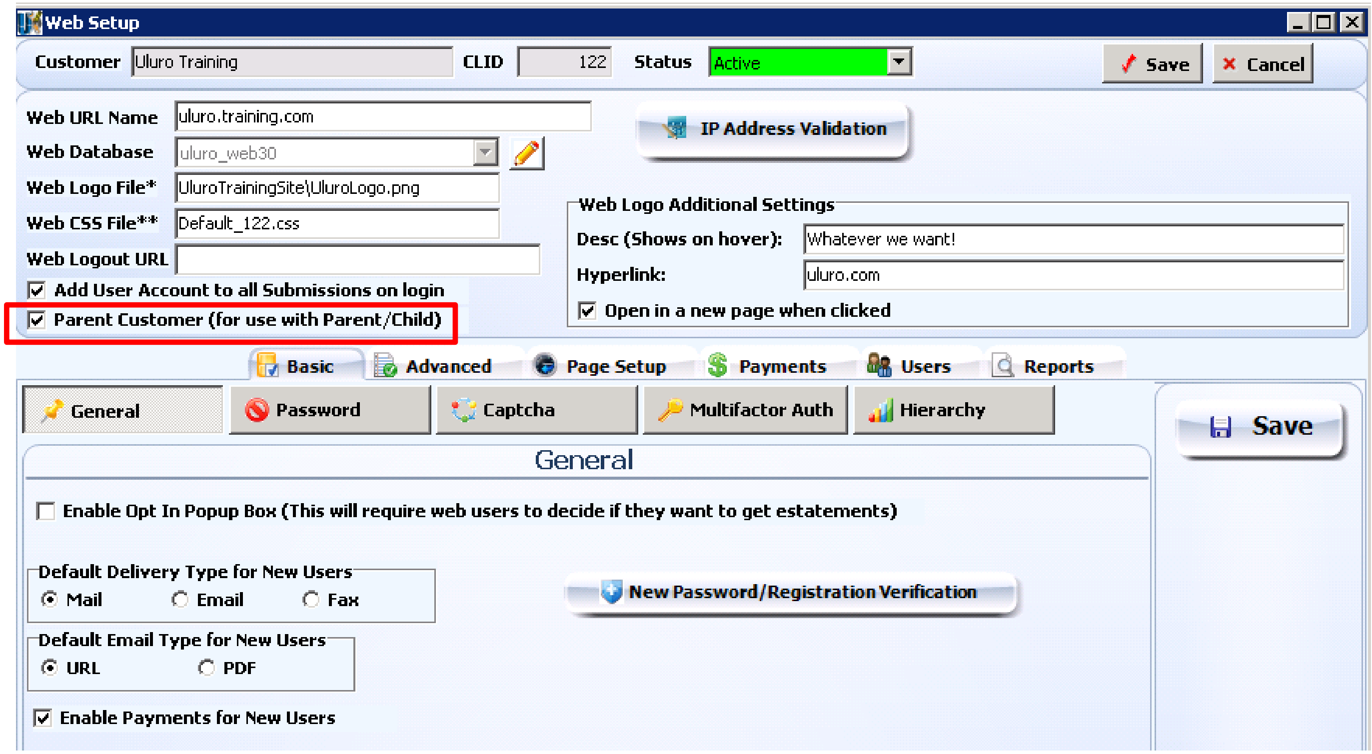
Parent/Child

Parent/Child allows users from one site (Parent) to view other sites(Children) as a ghost user with the purpose of observing and checking permissions, not to do administrative tasks.

Enabling Parent/Child is done within the Web Setup for the client that will have the Parent site.

Parent Customer – This must be checked for the Parent site. Do not check it for the child site(s).

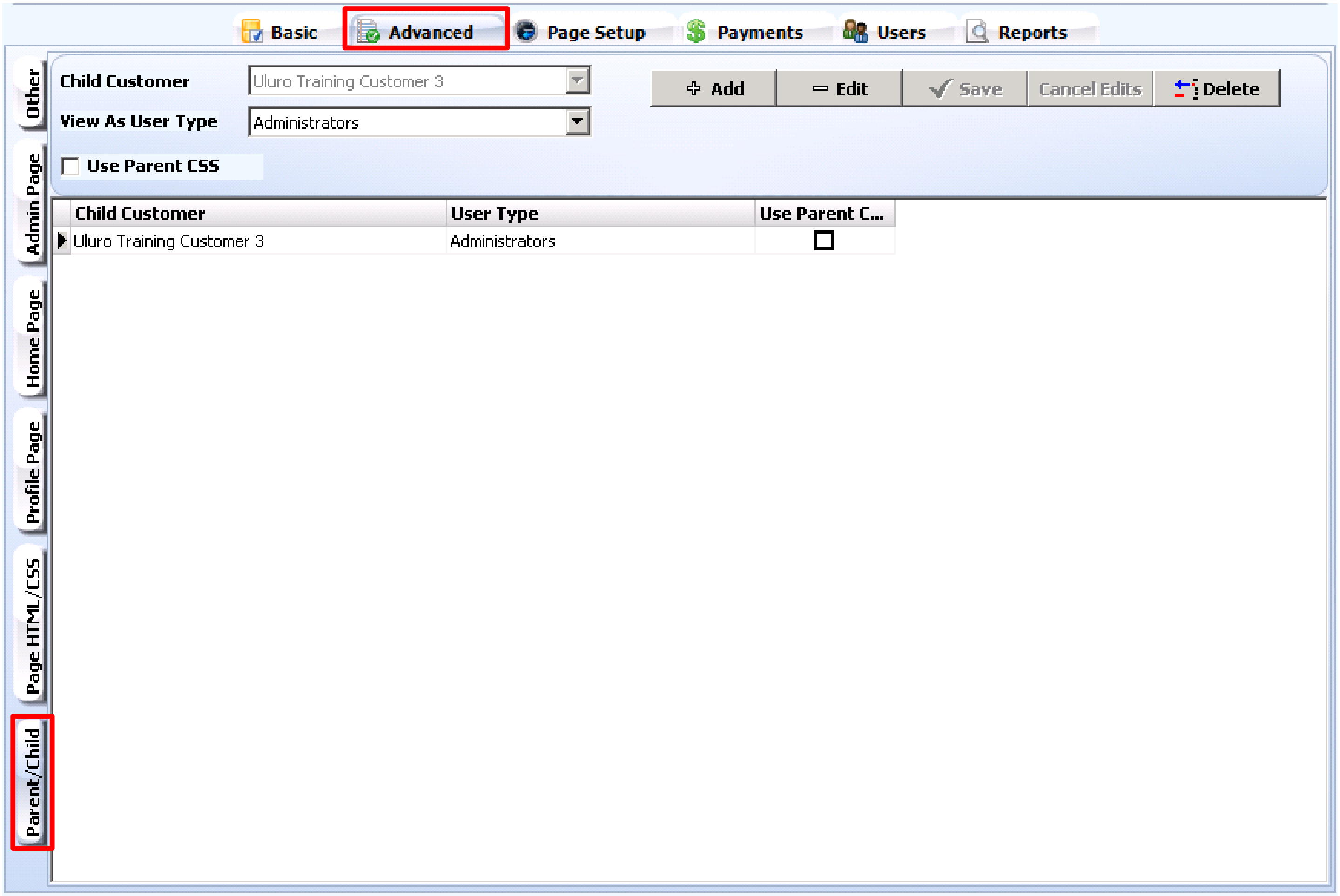
Once this is checked, a new tab will appear under the Advanced tab: Parent/Child.



Child Customer – Select the child site from the list of all sites. Add as many children as desired.

View As User Type – This is the user type whose eyes you wish to see the child site through. This list will be all of the User Types that have been created for the child site.

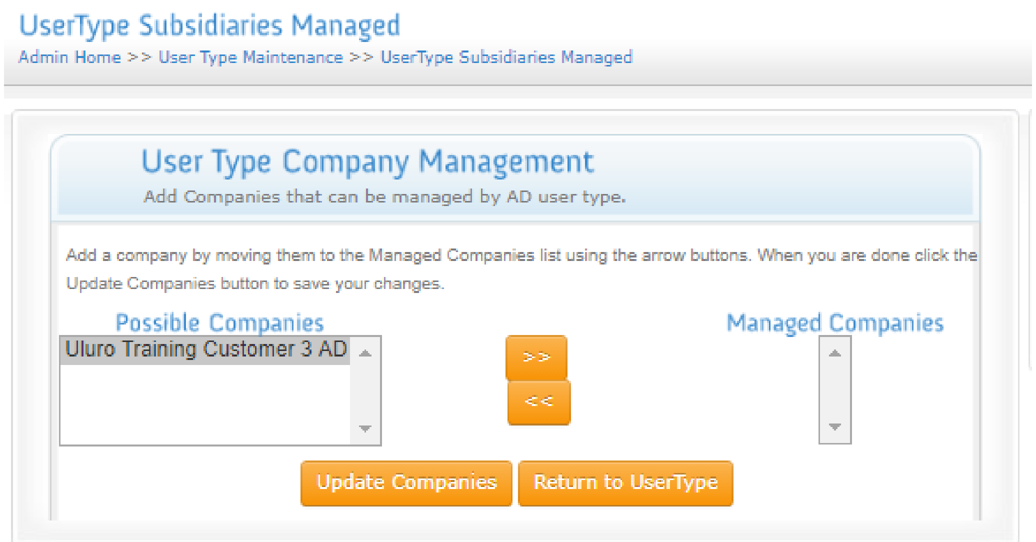
Use Parent CSS – If this is checked the child site will use the CSS of the Parent site only when being viewed by the parent.

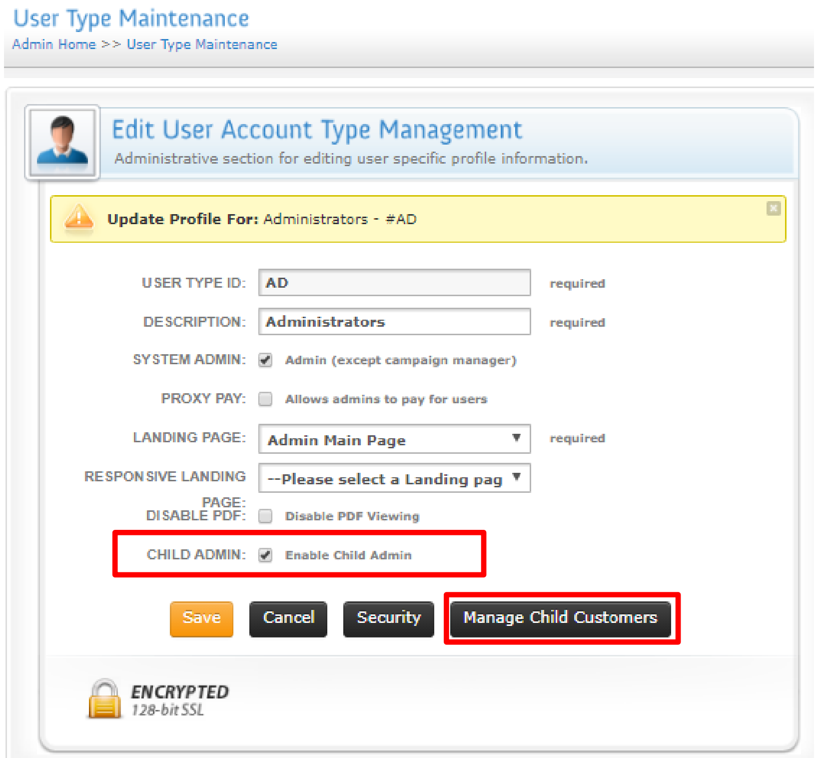


Login as an admin on the parent site. Under User Type Maintenance, select the admin user type. Make sure **Child Admin** is checked.

Click **Manage Child Customers** to add the children sites for that user type.

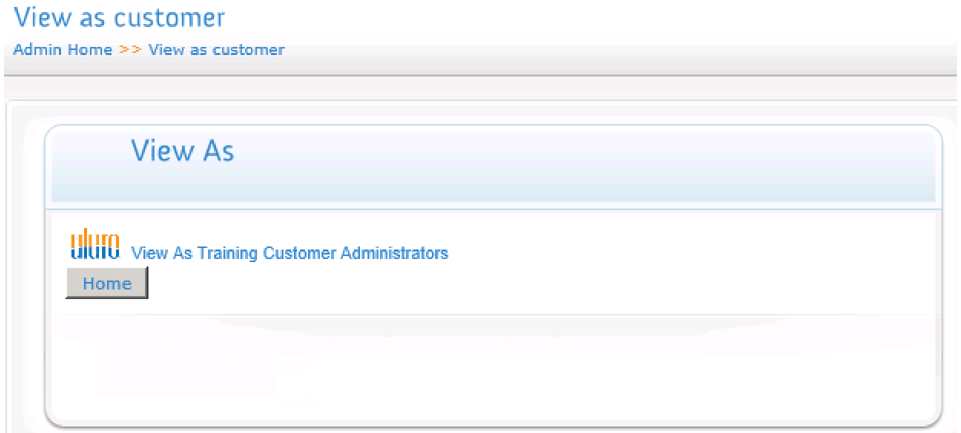
The Possible Companies will list all children that were added under the Advanced tab> Parent/Child. Select the companies to view as children and move them to the Managed Companies column. Click Update Companies for the change to take effect.





Go to the admin home page and you'll see the ability to view child sites in the top right.

Click on Switch Customer to view a child site.



The list of all children (Managed Companies) will be listed. Click on the site you wish to view.

Tips from Transformations:

If parent/child is enabled and setup and you wish to turn off parent/child, make sure you delete the children first, then uncheck the Parent Customer checkbox.

Never delete a child site until it has been removed from the parent!

Hierarchy

Hierarchy allows you to create trees of access within one site/client. This is for assigning users the ability to view certain submission for that website.

Create the Hierarchy Tree

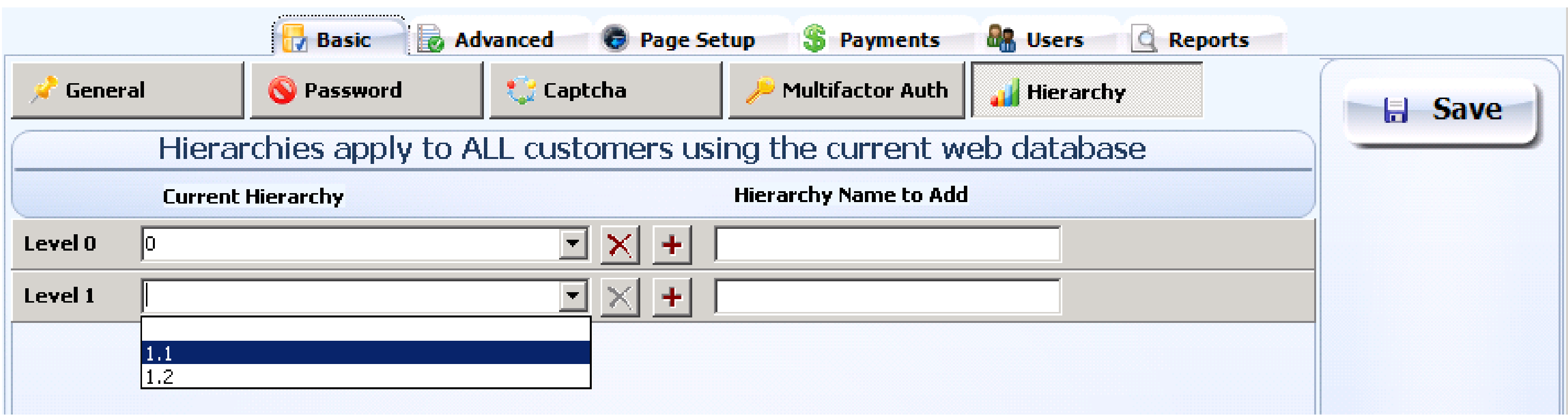
With the Web Setup > Basic tab > Hierarchy, define the levels of the hierarchy tree.

To add levels to the hierarchy, enter in the name and click on the plus (+) button.

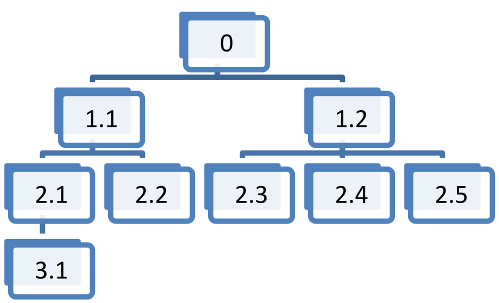
The hierarchy will be added at the level that the plus button is clicked.

Tips from Transformations:

The hierarchy tree will be the same for ALL customers, not just this one, so it should have enough levels and generic names so each client can use it if needed.

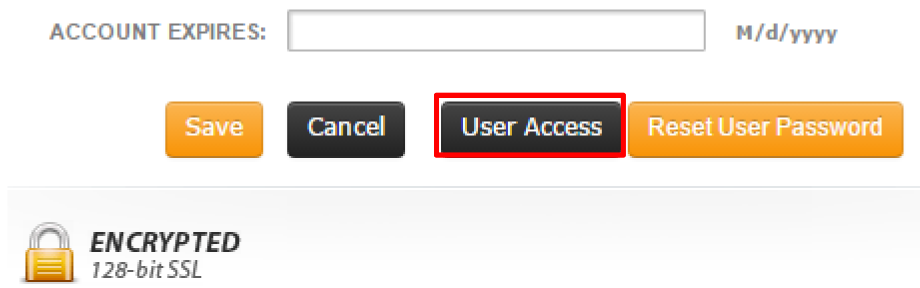


Example:



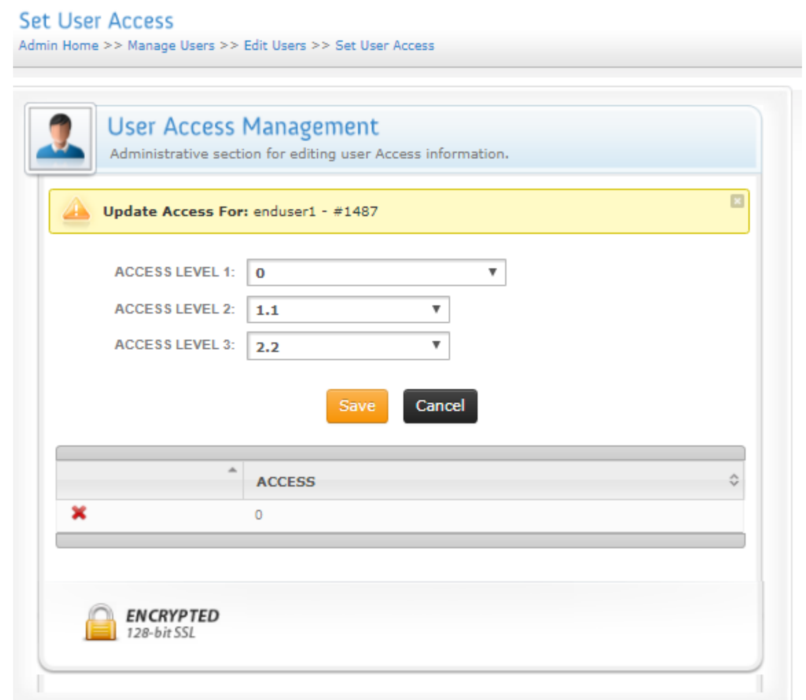
Assign Users Access to a Hierarchy Level

As an admin, under Manage Users, select a user to assign a hierarchy level. Click the **User Access** button at the bottom.



You can only assign a user one path/level.

This user will have access to anything level 2.2 or lower (if level 0 is the top of the tree and can view everything) on the hierarchy tree.

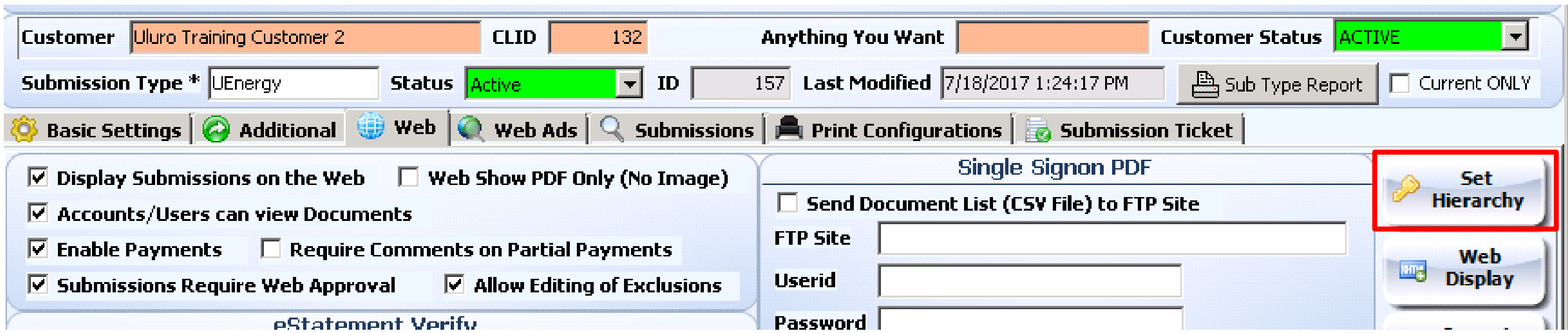


Tips from Transformations:

Users that have not been assigned a level by default will see all submissions.

Assign a Submission Type a Hierarchy Level

Within the submission type, under the Web tab, select Set Hierarchy.



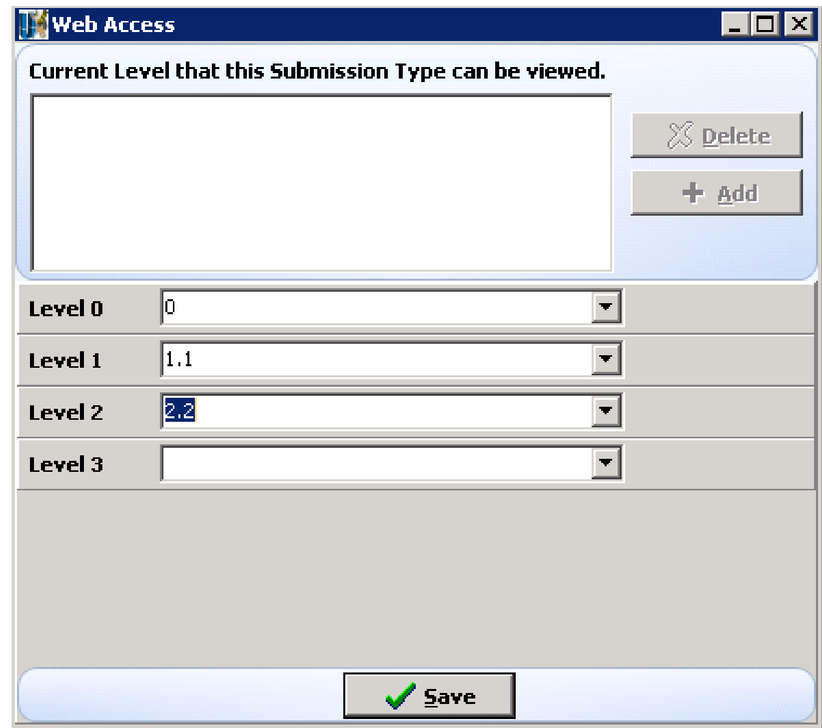
Select the path/level for this submission type. You can only add one level for each submission type.

This submission type will be viewable by users with level 2.2 or higher on the hierarchy tree.

Endusers are not effected by hierarchy if they are not assigned a level since their access is determined by acct #.

Admin/CSRs cannot see submission types with no hierarchy assigned; once one submission type has been assigned all must be assigned a level.

If one of the admin/CSR users has no user hierarchy assigned to them then they can see everything.



Tips from Transformations:

Once a submission type for a CLID has been assigned a hierarchy level, ALL submission types for that client should be assigned a level. Any that do not have a level will not be seen, even if the user has the highest access level.

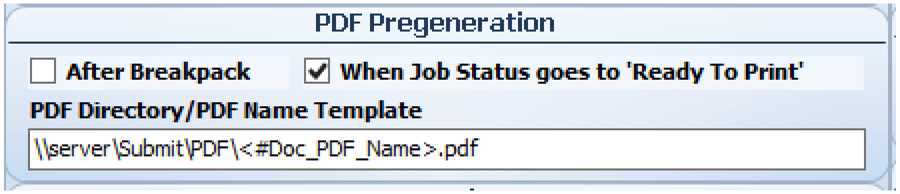
PreGeneration

Submission Level

Within a submission type, under the Web tab, PDF PreGeneration can be setup to generate individual PDFs or a Bulk PDF of the documents for a submission.

After Breakpack – This will generate the PDF of the document directly after Breakpack, prior to Cleanse or Presort.

When Job Status goes to 'Ready To Print' – This will generate the PDF after it has gone to Ready to Print status. This is recommended since all processes have occurred by this point.



PDF Directory/PDF Name Template – Enter the full path to the directory you want the PDFs to be archived. This should begin with \\server\submit\PDF\... The PDF directory must be accessible from the web server.

If the file contains illegal characters, they will be replaced with an underscore. If a field is blank, the output will be blank. The files have the same name they will not be overwritten; The file name will have _1, _2, etc. appended to the name prior to the file extension.

The PDF will then be streamed from that folder rather than generated on the fly when documents are being viewed on the website. PDF's generated with a formatted name will not be used on the web for PDF display. If the Pregenerated PDF's are formatted names then the Web call for PDF will generate the PDF on the fly. The main reason for this is the possibility of a non-unique PDF name. As an example if the PDF is being named for Sys_Acct_ID, we can identify the fact that we have already created one PDF with the Same name at creation time (already exists on the file system), but when creating a single PDF at Web Display time we will not know whether to use the pdf named for the Sys_Acct_ID or the PDF named for Sys_Acct_ID_1, Sys_Acct_ID_2, etc.

Ucompose

If the user has a specific naming specification, then a Save to DB field can be used that will allow the PDF to be named as desired.

In uCompose create the Field. A suggestion for the Name would be Doc_PDF_Name. Check the Save to DB checkbox in Field definition.

If the name will be complex from multiple variables or data, then set the field to not assigned. In the Display section use conditions and functions to create a variable that defines the name to use. Then assign the variable to the field using the Assign Field command.

During Breakpack the Doc_PDF_Name will then contain the desired name.

Tips from Transformations:

Variables should not be used in the directory structure unless the directory already exists.

Fields must be defined in the map and on each document or they will not be used as part of the directory/naming structure.

If there is no name structure the default is by document ID for each document has a unique name.

RPPregen

RPPregen is run as a scheduled task. It should be run in a directory where the Makepdf.exe program and PNGDLL.dll exist. The location and user running the program should have access to the data, images and fonts necessary to create the pdf.

RPPregen will run multiple copies of MakePDF which uses the PNGDLL to generate the PDF's.

PNGDLL.dll

During PDF PreGeneration, the PNGDLL.dll checks for the existence of the fieldnames in the PDF Directory field in the subtype table and uses the fieldnames for the PDF Naming. PDFs created with formatted names will not be used by the Web. When PDF's are created for use on the Web, the PDF's will not be created in the Pregen folder.

If PreGenerating both After Breakpack and Ready to Print, the Ready to Print PDF's will overwrite the After Breakpack PDF's.

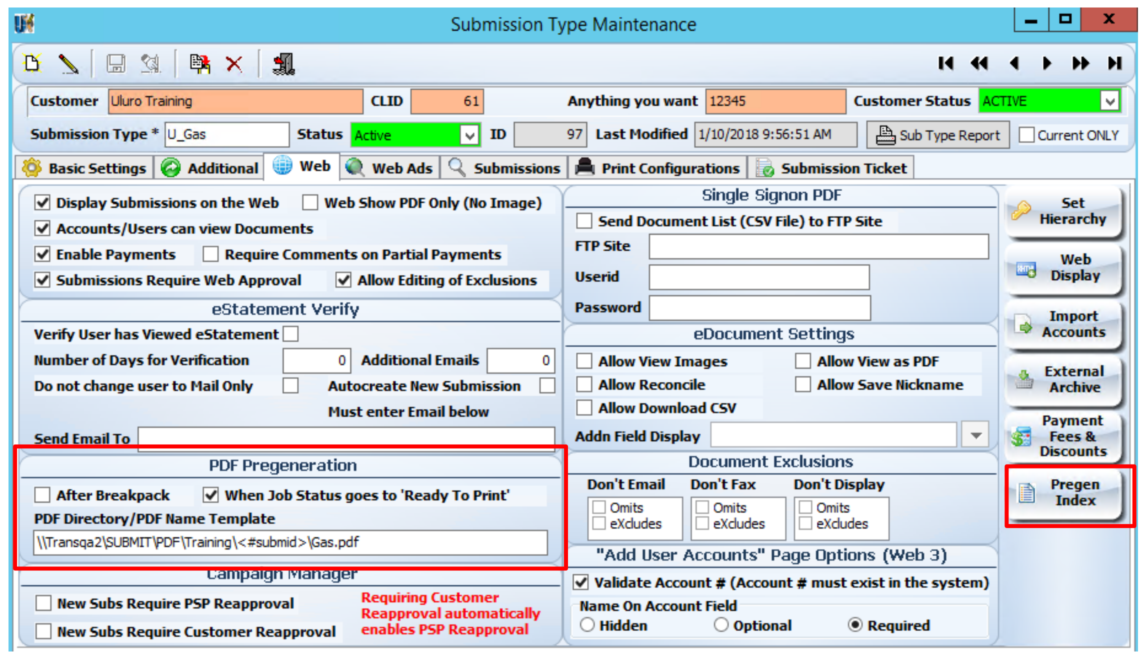
Pregen Index File

There is a custom index file that will be created when the PDFs are pregenerated. When this feature is enabled within a submission type, pregeneration will only generate one PDF containing all documents. The index file will be your guide to finding individual documents within the PDF. Set up a directory for the Pregen PDFs.

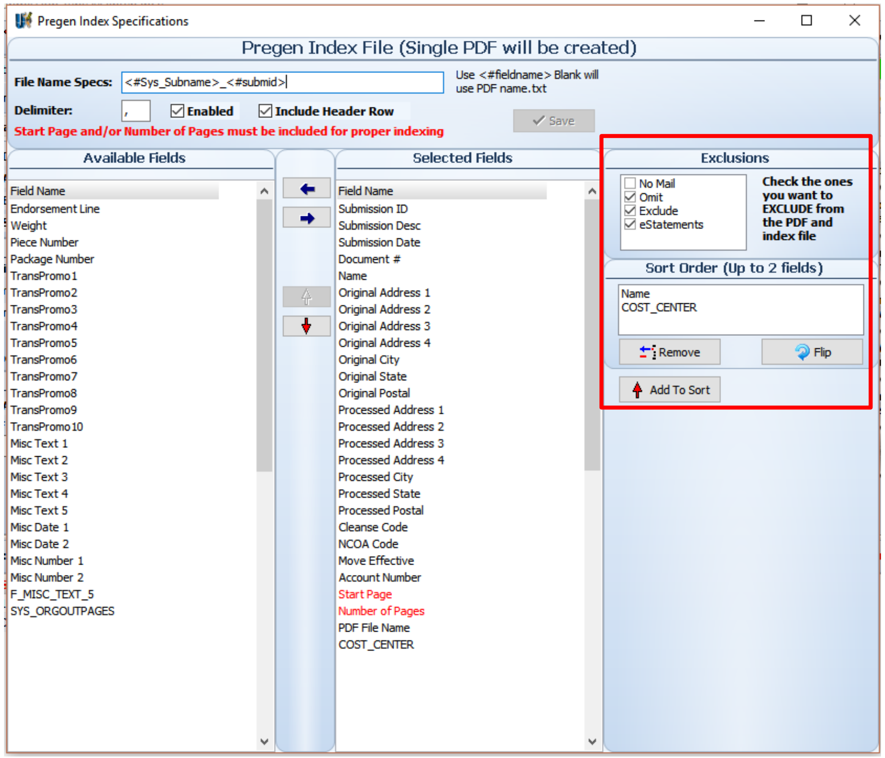
Click on Pregen Index.

Tips from Transformations:

If the name for a PDF has any invalid characters, those will be replaced with an underscore.



On the Pregen Index Specifications form you can do the following.



- Enter the File Name Specifications. This could be the name of the file or you can use <#fieldname> to specify variables. The fieldname would be any of the acceptable fields in uCompose.
  Ex: <#sys_subname>_<#submid>.idx.
  If no specification is entered, the index file will use the name of the PDF with a .txt extension.
- Select the delimiter. The index file will be a delimited file.
- Enabled. If this is not checked, the index file will not be created.
- Include Header Row. Check this to include the field names as the first row in the file.
- Adding fields to the index file.
  - To add a field, select a field on the left side and click on the right arrow.
  - To remove a field, select a field on the right side and click the left arrow.
  - To move a field to a different position, select a field on the right and click the up arrow or down arrow to move.
  - Fields are saved automatically.
- Adding exclusions. If you want to exclude documents from the output PDF and the index file, check the appropriate boxes.
- If you would like to set a sort order, you can add up to 2 fields for the order from the selected list of fields. Start Page, Number of Pages and PDF File Name cannot be added. To add them select the field from the ones in the selected menu, then click Add to Sort.

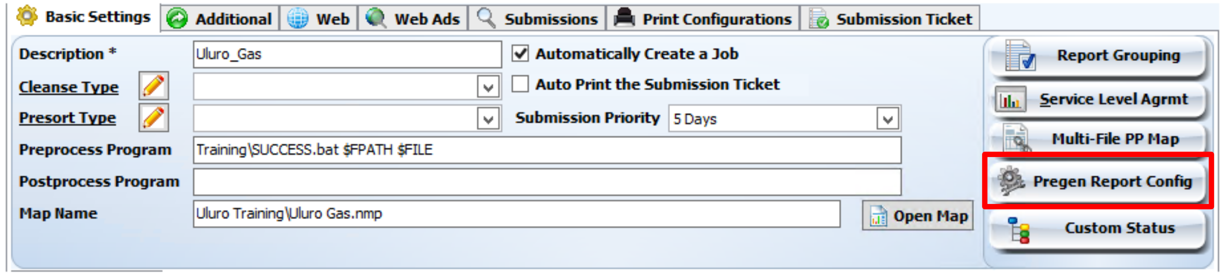
Save. Make sure you have enabled pregeneration and run a submission. When it is time to generate the PDF, a single PDF will be created, and the index file will also be created. The index file will be in the same folder as the PDF.

Sample of the index file:

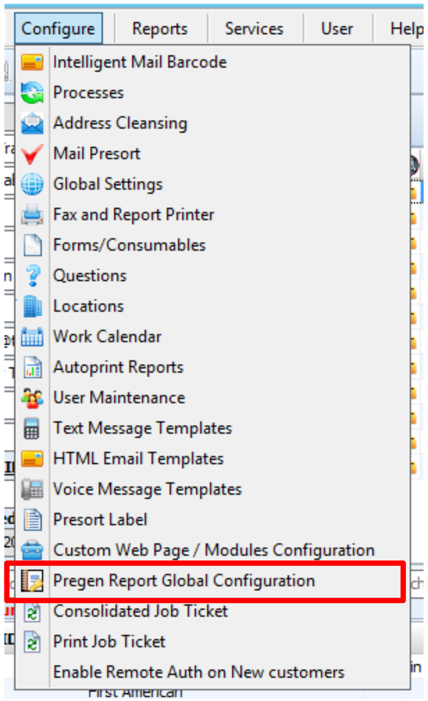
```
143796|CheckImg|20170228|1|DEMO CUSTOMER 143|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||1|2|40000143.pdf
143796|CheckImg|20170228|2|DEMO CUSTOMER 144|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||4|2|40000143.pdf
143796|CheckImg|20170228|3|DEMO CUSTOMER 145|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||7|2|40000143.pdf
143796|CheckImg|20170228|4|DEMO CUSTOMER 146|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||10|2|40000143.pdf
143796|CheckImg|20170228|5|DEMO CUSTOMER 147|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||13|2|40000143.pdf
143796|CheckImg|20170228|6|DEMO CUSTOMER 148|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||16|2|40000143.pdf
143796|CheckImg|20170228|7|DEMO CUSTOMER 149|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||19|2|40000143.pdf
143796|CheckImg|20170228|8|DEMO CUSTOMER 140|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||22|2|40000143.pdf
143796|CheckImg|20170228|9|DEMO CUSTOMER 141|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||25|2|40000143.pdf
143796|CheckImg|20170228|10|DEMO CUSTOMER 142|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||28|2|40000143.pdf
143796|CheckImg|20170228|11|DEMO CUSTOMER 150|200 Seaboard Ln|Franklin, TN, 37067 ||||200 Seaboard Ln|Franklin, TN, 37067 |||||31|2|40000143.pdf
```

Pregen Report Configuration

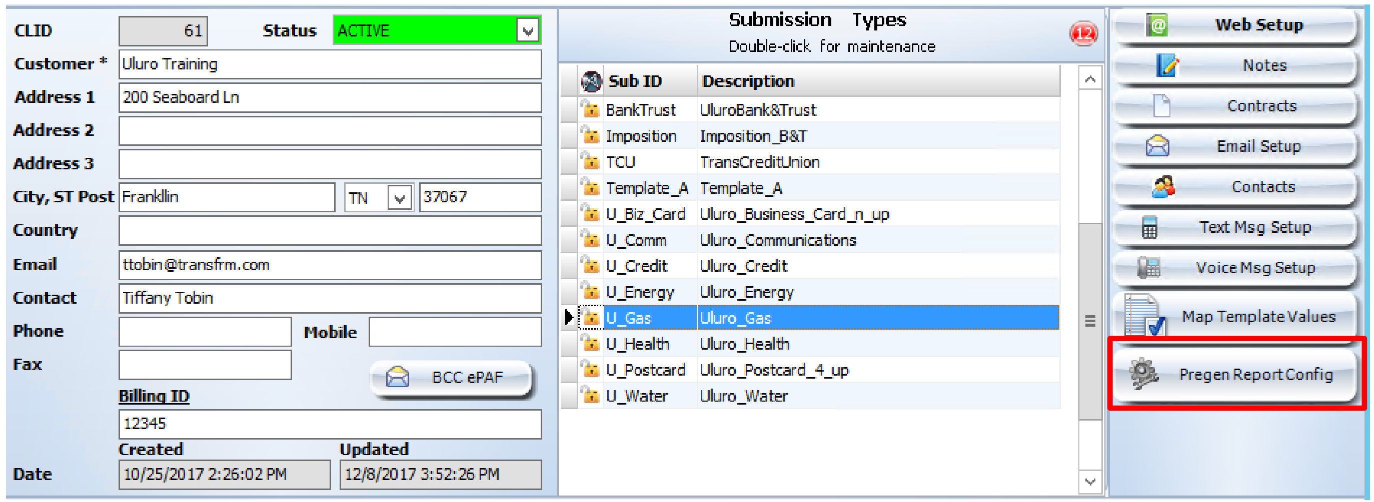
There are 3 places it can be configured, globally, by customer or by submission type. The generation of the report will always go from lowest level to highest. It will look at the submission type first for the configuration. If one has not been set up, it will look at the customer. If one has not been set up, it will look at the global. The lowest active level is always used.



The Submission type level can be setup under the Pregen Report Config button.



The client level can be setup under the Pregen Report Config button once the client has been selected in the list of clients at the bottom of the uSetup Main screen.



The global level can be setup under the Configure Menu. Select Pregen Report Global Configuration.

The setup process works the same for the global, customer and submission type level.

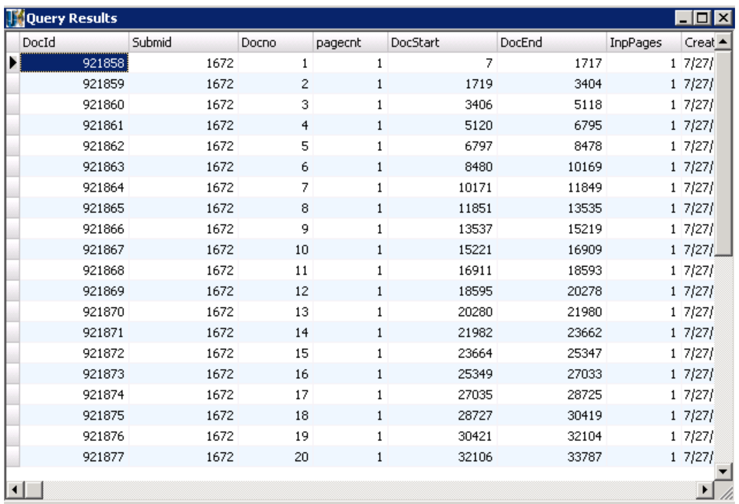
Previously setup Pregen Report configurations can be loaded from other submission types, customers, or global.

Report Name - Enter a name for the report.

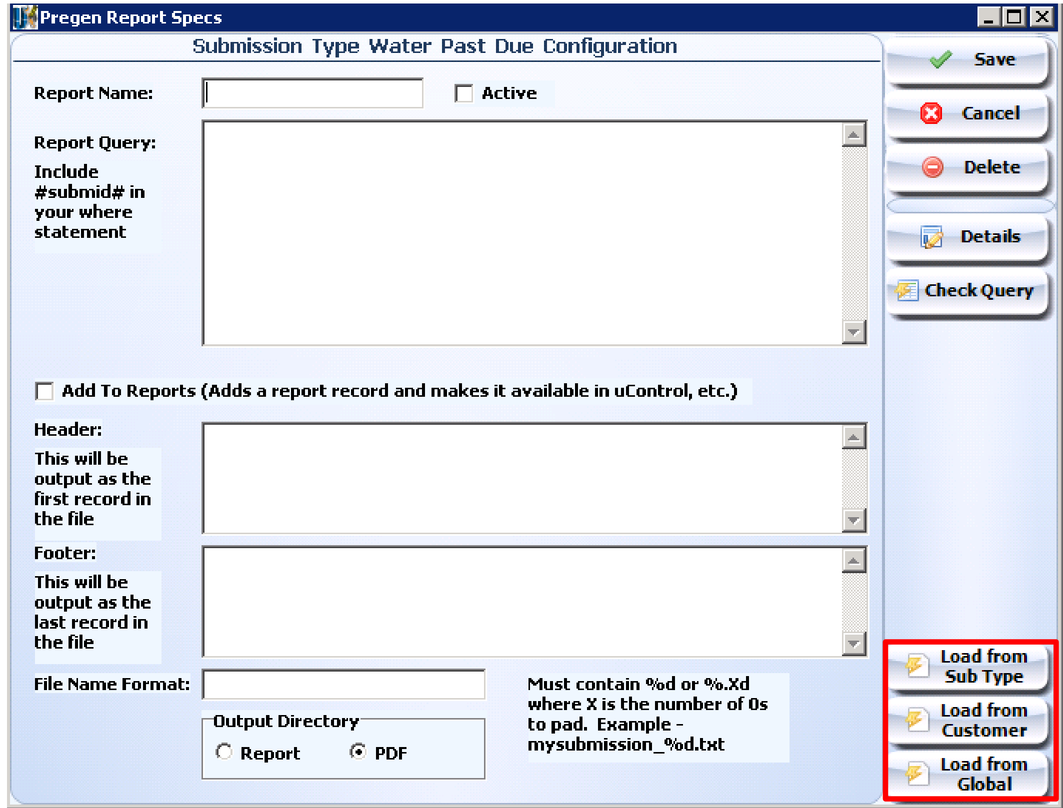
Active - Check to enable this level.

Report Query - Enter the report query. This will provide the fields for the report. The query MUST contain submid = #submid#. #submid# will be replaced by the submission id. You should test the query by clicking on the Check Query button. This will verify if the query is ok.

Click the Check Query button to preview the report query results:



DocId	Submid	Docno	pagecnt	DocStart	DocEnd	InpPages	Creat
921858	1672	1	1	7	1717	1	7/27/
921859	1672	2	1	1719	3404	1	7/27/
921860	1672	3	1	3406	5118	1	7/27/
921861	1672	4	1	5120	6795	1	7/27/
921862	1672	5	1	6797	8478	1	7/27/
921863	1672	6	1	8480	10169	1	7/27/
921864	1672	7	1	10171	11849	1	7/27/
921865	1672	8	1	11851	13535	1	7/27/
921866	1672	9	1	13537	15219	1	7/27/
921867	1672	10	1	15221	16909	1	7/27/
921868	1672	11	1	16911	18593	1	7/27/
921869	1672	12	1	18595	20278	1	7/27/
921870	1672	13	1	20280	21980	1	7/27/
921871	1672	14	1	21982	23662	1	7/27/
921872	1672	15	1	23664	25347	1	7/27/
921873	1672	16	1	25349	27033	1	7/27/
921874	1672	17	1	27035	28725	1	7/27/
921875	1672	18	1	28727	30419	1	7/27/
921876	1672	19	1	30421	32104	1	7/27/
921877	1672	20	1	32106	33787	1	7/27/



Add To Reports - Check this if you would like the pregen report to be available in uControl, uDashboard, or uPrint for viewing/printing.

Header – Enter any report header information. This will be the first line/lines of the report.

Footer – Enter any report footer information. This will be the last line/lines of the report.

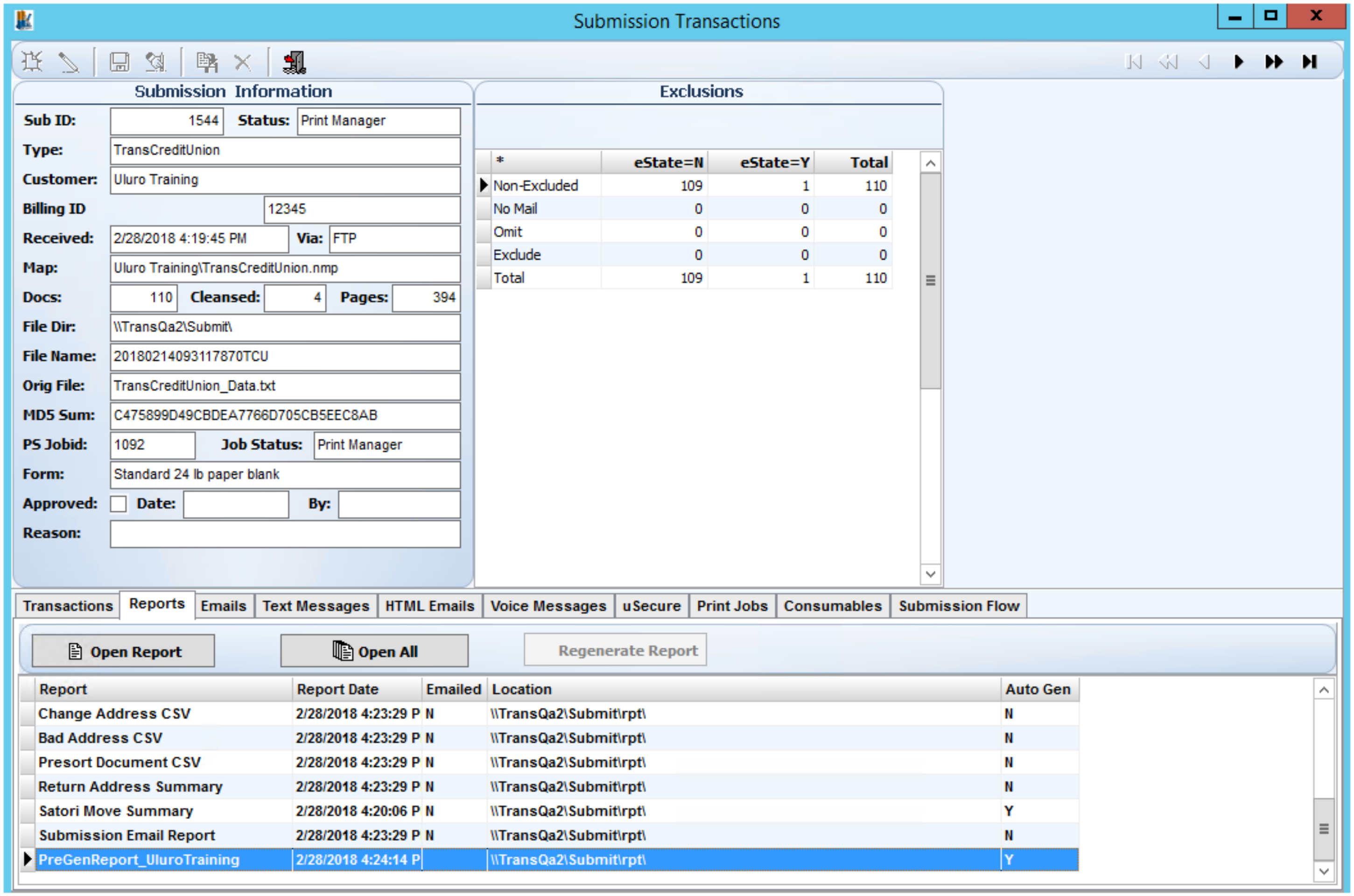
File Name Format – Enter the format for naming the report. It must contain %d or %.Xd where X is the number of zeros to pad. Example – mysubmission_%d.txt would name the report mysubmission_123.txt for submission id 123.

Output Directory – Choose Report or PDF.

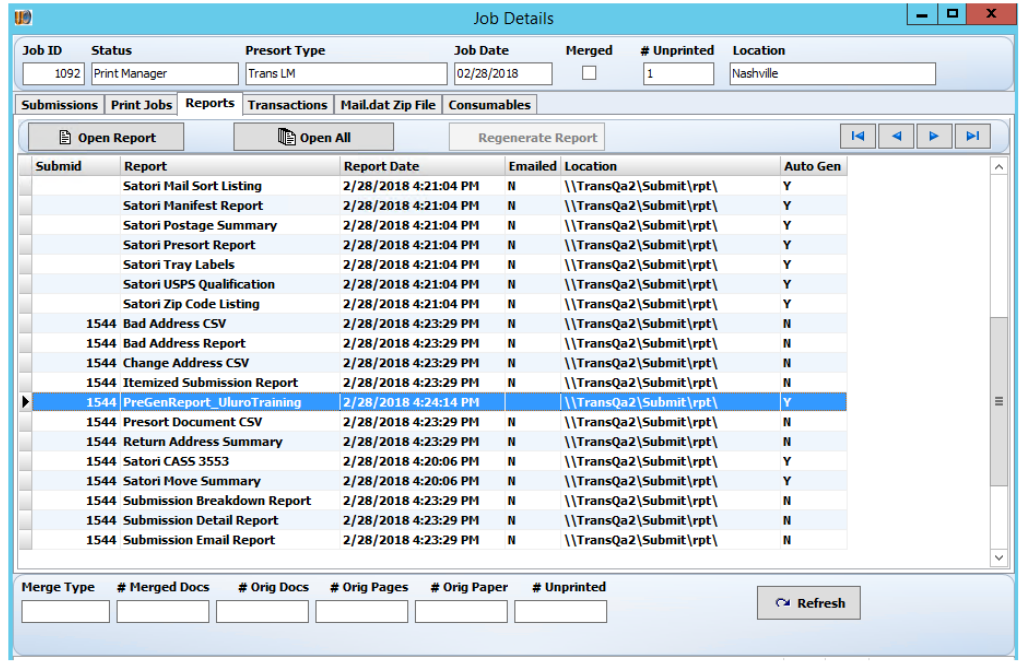
Save your settings. Once saved, the **Details** button will appear above the Check Query button. Details must be included.

If Add To Reports was checked, you can access the pregen report from uControl, uDashboard, or uPrint. The report will not be accessible in these 3 modules if that setting was unchecked.

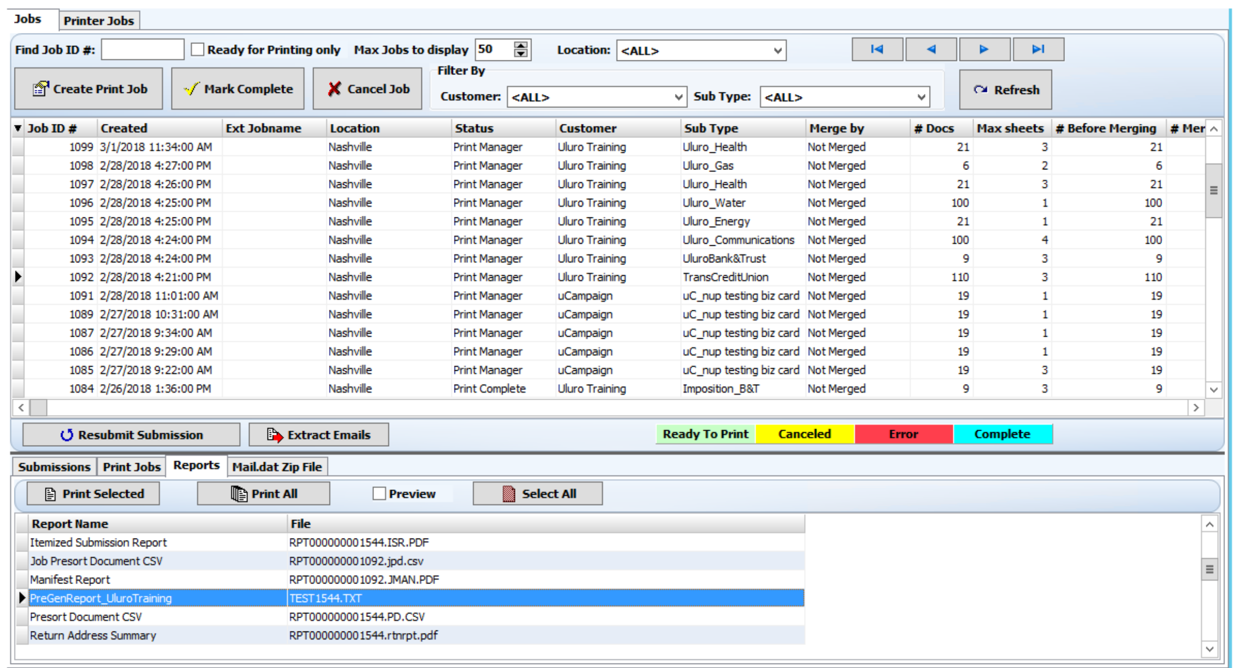
In uControl, double click on a submission. Go to the reports tab.



In uDashboard, go to the jobs tab and double click the desired job.



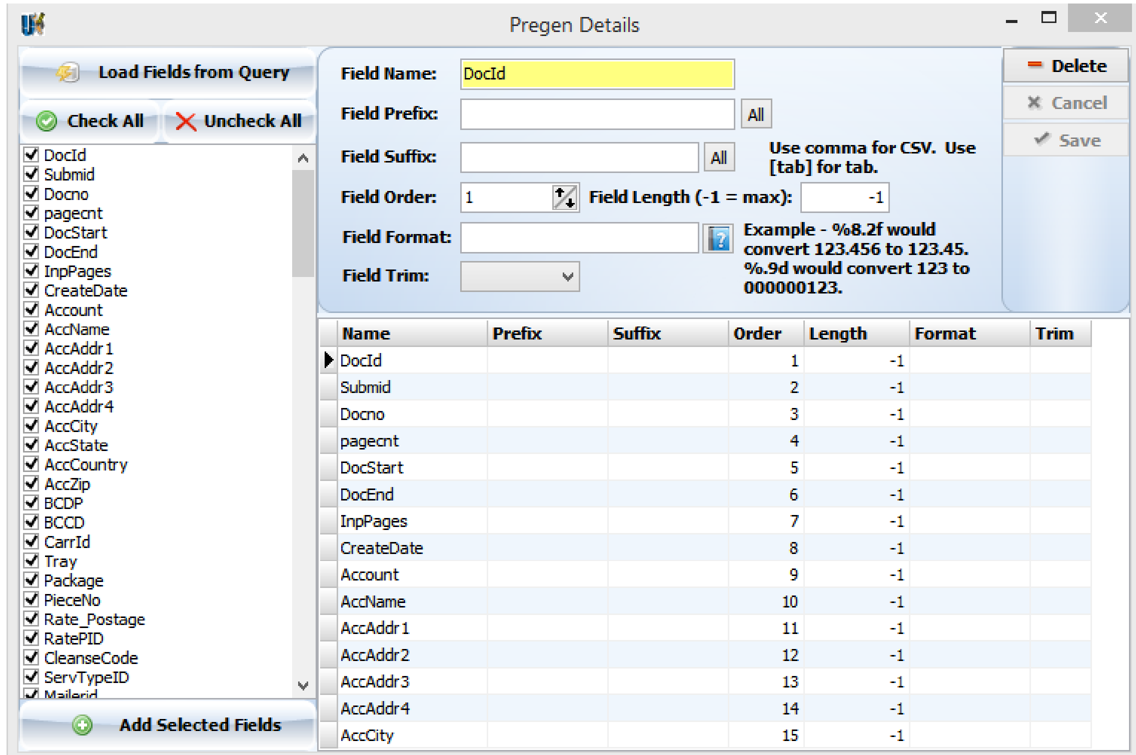
In uPrint, select the job and click on the report tab at the bottom



Report Details

To add fields to the report, click on the **Load Fields from Query** button. This will load a list of all fields returned by the query into the list box on the left.

Check the fields you want to include on the report. You can click Check All to select all fields.



Once you have selected the fields you want, click **Add Selected Fields**.

All selected fields will then be available to the report. You can begin modifying specific details, formatting, etc. to the individual fields.

Field Prefix – Enter any prefix that will be placed before the field value. If you want to put quotes around the data, put " in the field. If you would like the same prefix on all fields, click the All button.

Field Suffix – Enter any suffix that will be placed after the field value. If you are creating a delimited file, include the delimiter. If you want to tab delimit, put in [tab]. You can update all fields with the same suffix by clicking on the All button.

Field Order – set the order the field will appear in the report.

Field Length – set the length of the field. If you want the full length, put in -1.

Field Format – enter string formatting for the field. This uses Delphi string formatting commands. To see a list of these commands, click on the tip button. (See below)

Field Trim – Select from the list if you want to trim spaces from the data. The values are blank (no trimming), Left, Right and Both.

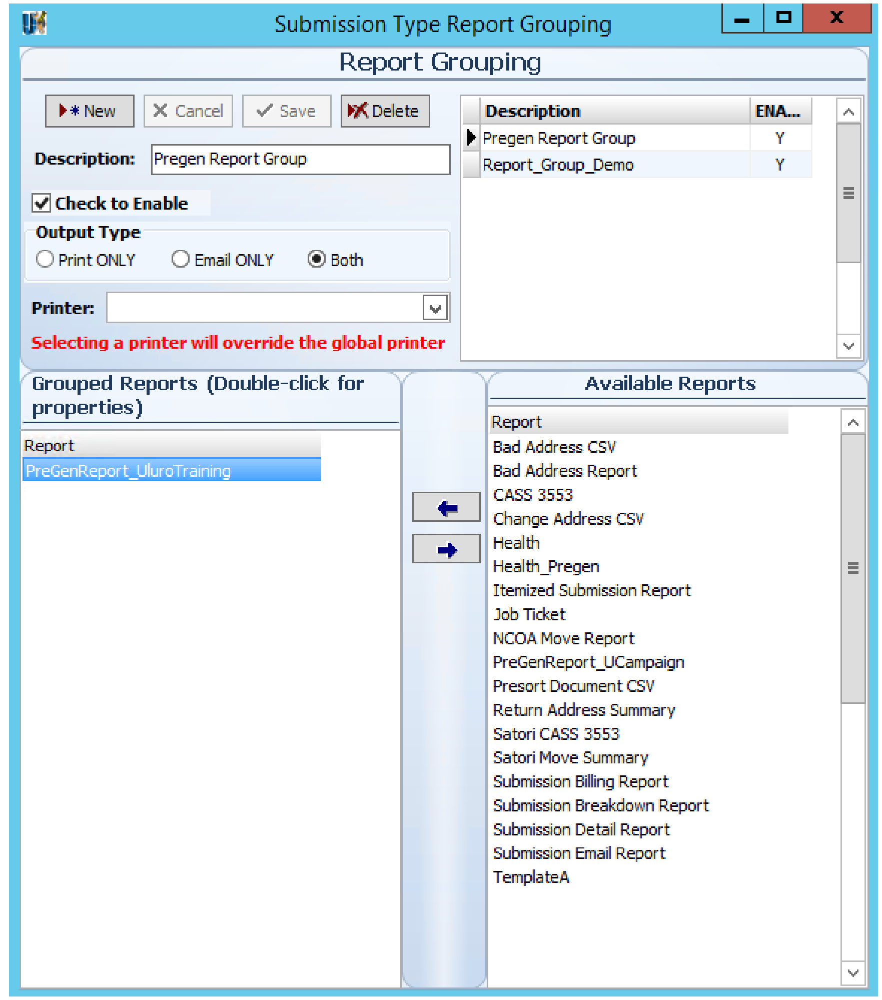
Save.

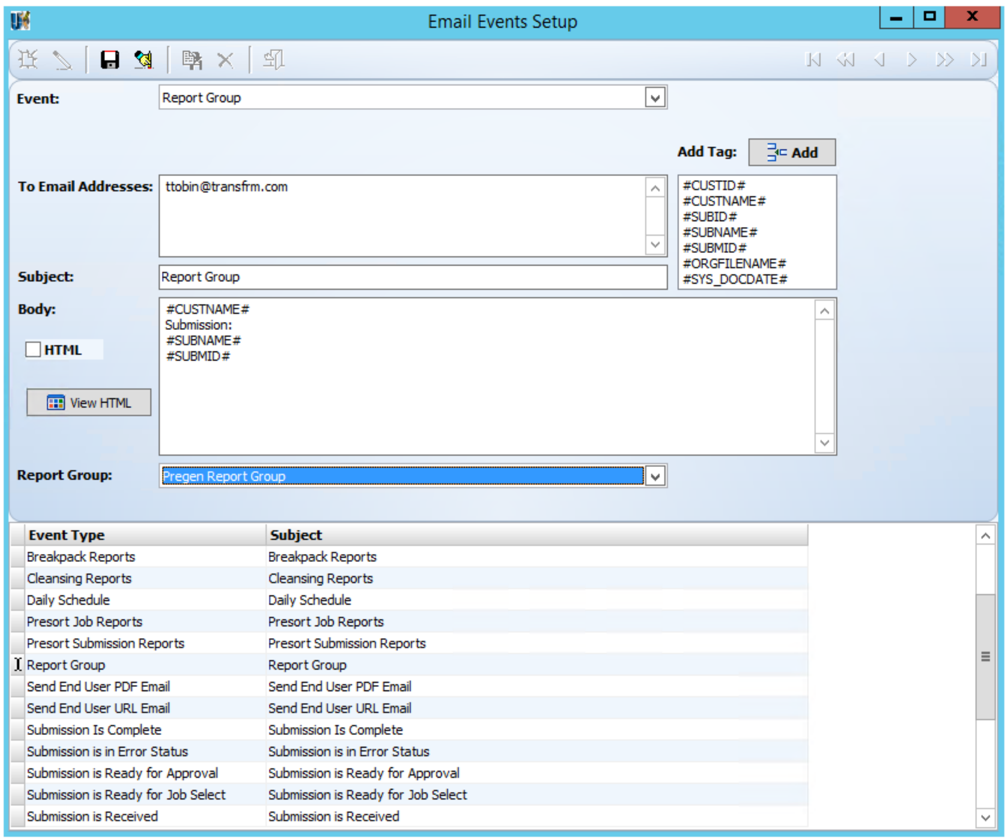
Pregen Reports can be part of a report group and printed/emailed individually or with other reports.

The submission and customer level pregen reports will be listed within the report group.

Create a report group with the desired settings. Add the pregen report to the list of grouped reports.

Enable that report group within an email event. This can be done within the email tab of a submission type.





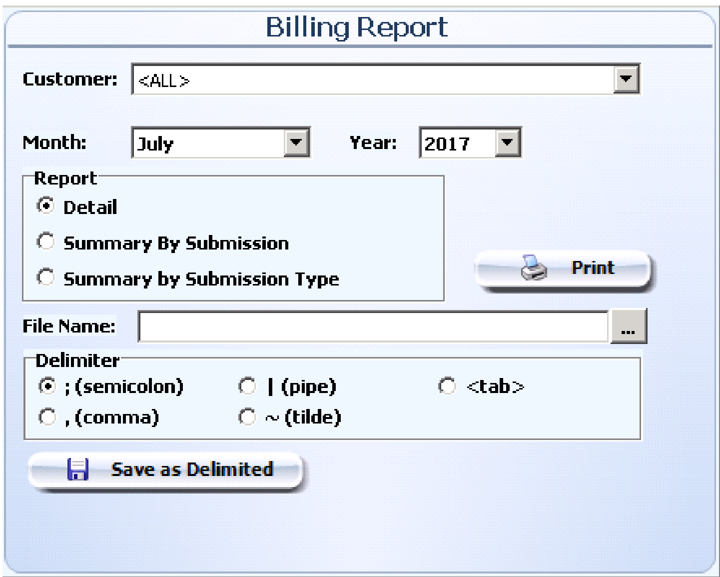
Reports

Reports Tab in Web Setup / Reports Main on uSetup Main Page

- Billing Report
- Alternate Billing Report
- Multi Channel Delivery Report
- Authorize.net Settlment

Samples:

Billing Report



Billing Summary Report by Submission Type

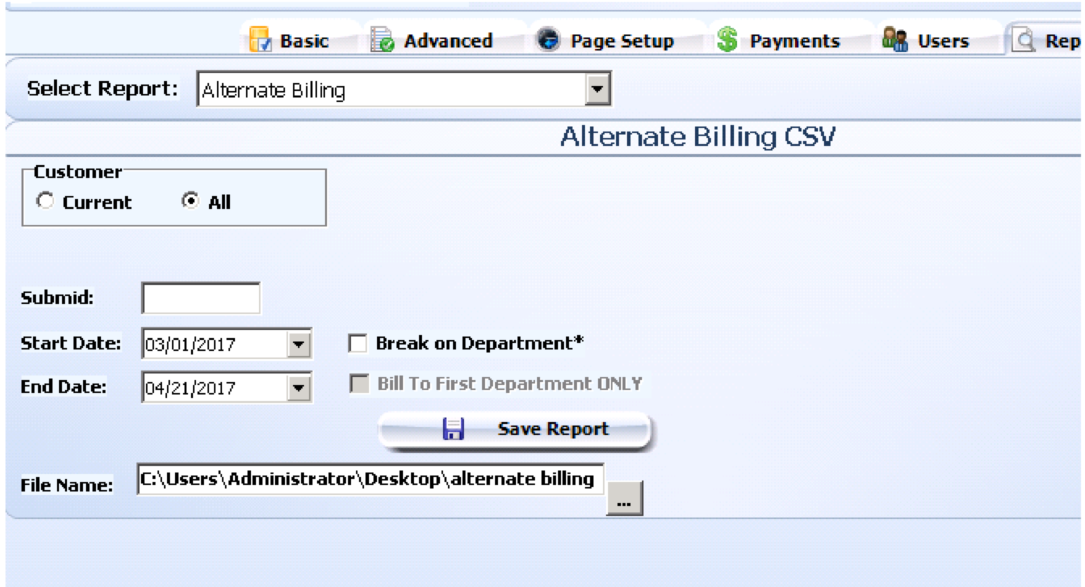
Reporting Period: 4 / 2017

Sub Type ID	Description	# Documents	# Enrolled
Cust ID: 122	**Name:** Uluro Training		
134	Trans Credit Union	0	0
145	uDeliver	6	1
133	Uluro Bank & Trust	18	1
135	Uluro Communications	0	0
137	Uluro Energy	105	5
136	Uluro Health	21	1
132	Water Past Due	0	0
Cust ID: 132	**Name:** CP Training Day 6		
160	TransCreditUnion	110	1
157	UluroEnergy	105	2
159	UluroGasBill	6	2

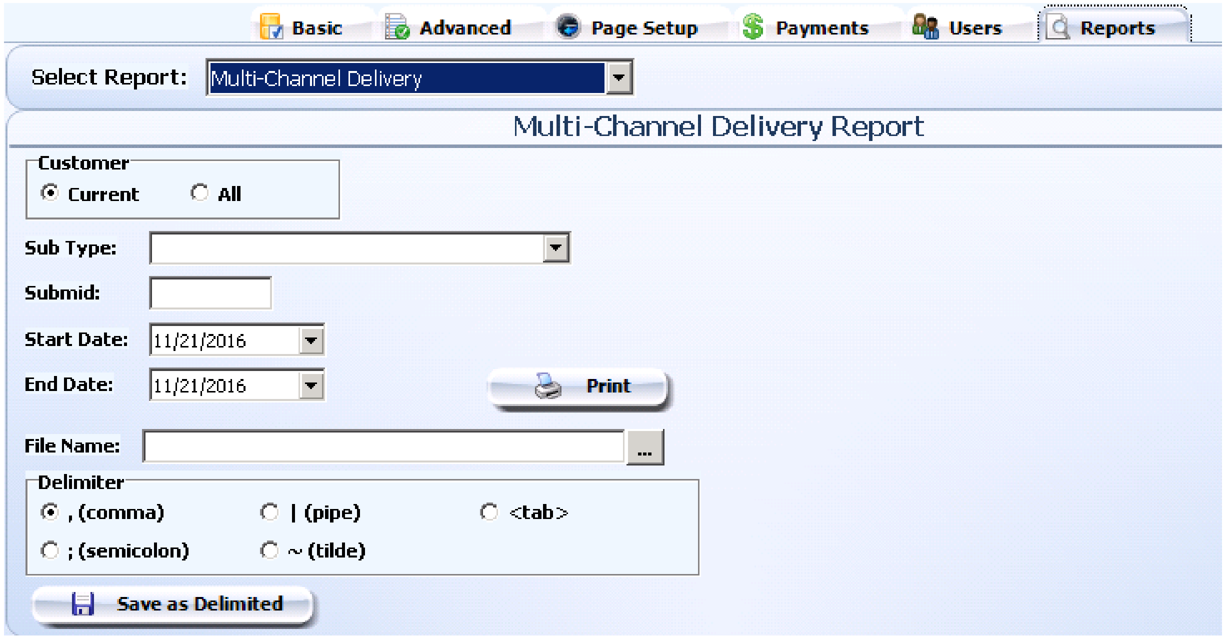
Billing Detail Report

Reporting Period: 7 / 2017

Sub Type ID	Description	Submission	Sub Date	Account #	Enrolled
Cust ID: 122	**Name:** Uluro Training				
134	TransCreditUnion			143857	Y
134	TransCreditUnion			2385300	Y
134	TransCreditUnion			8657422	Y
134	TransCreditUnion			8676209	Y
134	TransCreditUnion	1645	7/19/2017	10-9	N
134	TransCreditUnion	1645	7/19/2017	10 10123456789	Y
134	TransCreditUnion	1645	7/19/2017	134-9	Y
134	TransCreditUnion	1645	7/19/2017	136-2	N
134	TransCreditUnion	1645	7/19/2017	136-2	N
134	TransCreditUnion	1645	7/19/2017	219-6	N
134	TransCreditUnion	1645	7/19/2017	219-6	N
134	TransCreditUnion	1645	7/19/2017	34-9	N



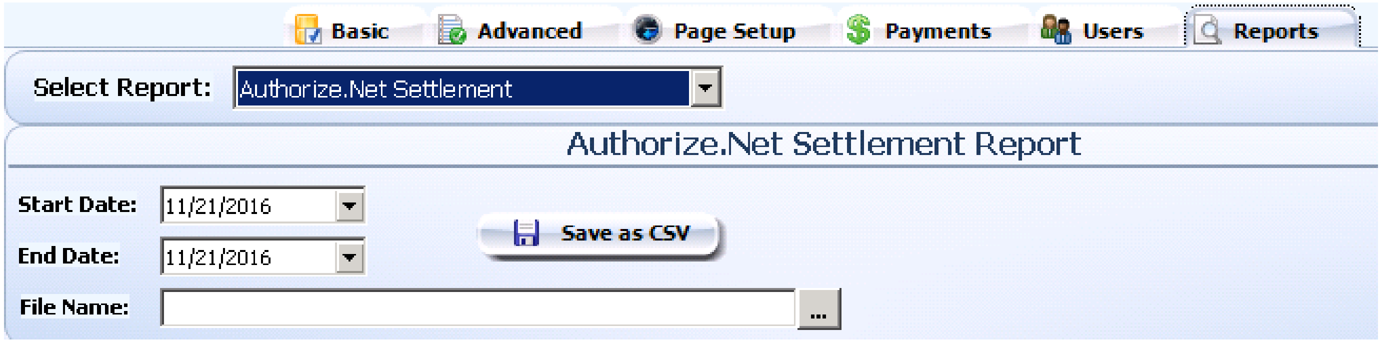

```
"Output Type","SubmissionID","JobID","PrintJobID","Print Config. Description","CustomerName","CustId","Submission Type ID","JobDate","JobTime","I
"Print","142532","11315","15830","","Vantiv Smaug Test","108","288","10/14/2015","16:24:04","8.5 x 11 White Paper","credits.txt","12","12","0","(
"Print","142532","11315","15834","","Vantiv Smaug Test","108","288","10/21/2015","10:26:59","8.5 x 11 White Paper","credits.txt","2","2","0","0",
"Print","142532","11315","15835","","Vantiv Smaug Test","108","288","10/21/2015","10:33:51","8.5 x 11 White Paper","credits.txt","2","2","0","0",
```



Multi-Channel Delivery Report

From 10/1/2014 to 12/12/2014

								Call Duration						Trans
Account #/Name	**Sub ID**	**PO #**	**Sub Type Name**	**Subm ID**	**# Text**	**# Email**	**# Phone**	**<= 1:00**	**1:01-2:00**	**2:01-3:00**	**3:01-4:00**	**4:01-5:00**	**> 5:00**	**Dur**
1Z234FR68	DevXML		DevXMLTest	88085	0	0	1	1	0	0	0	0	0	0
1Z234FR68	DevXML		DevXMLTest	135083	0	30	0	0	0	0	0	0	0	0
1Z234FR68	DevXML		DevXMLTest	135142	0	30	0	0	0	0	0	0	0	0
1Z234FR68	DevXML		DevXMLTest	135143	0	30	17	4	13	0	0	0	0	0
				Totals:	0	90	18	5	13	0	0	0	0	0




```
Auth.Net Transaction ID,Uluro Payment ID,Uluro Web User,Payment Status,Response Code,Authorization Code,Address Verification Status,Payment Method,Card Number,Invo
2224980468,53092,"PROFESSIONAL TITLE","X","1","6XDBW8","Y","MasterCard","XXXX0057","",0.75,0.00,"",0.75,Dec  2 2014  2:14PM,Dec  2 2014  4:49PM,"settledSuccessfull
2224980467,0,"","A","1","","Y","MasterCard","XXXX0057","",0.00,0.00,"",0.00,Dec  2 2014  2:14PM,Dec  2 2014  4:49PM,"voided","41-984266949fc83-d76","PROFESSIONAL T
2224980322,53091,"PROFESSIONAL TITLE","X","1","THEBZ5","Y","Discover","XXXX6909","",1.14,0.00,"",1.14,Dec  2 2014  2:07PM,Dec  2 2014  4:49PM,"settledSuccessfully"
2224980321,0,"","A","1","","Y","Discover","XXXX6909","",0.00,0.00,"",0.00,Dec  2 2014  2:07PM,Dec  2 2014  4:49PM,"voided","41-98426c27c0cfc-112","PROFESSIONAL TIT
2224979571,0,"","A","1","IOUL7G","Y","AmericanExpress","XXXX2376","",0.00,0.00,"",0.00,Dec  2 2014  1:46PM,Dec  2 2014  4:49PM,"voided","41-98426642e8783-0ca","PRO
2224979535,0,"","A","1","","Y","MasterCard","XXXX0057","",0.00,0.00,"",0.00,Dec  2 2014  1:45PM,Dec  2 2014  4:49PM,"voided","41-98426642e8783-0ca","PROFESSIONAL T
2224979506,0,"","A","1","HB72TJ","Y","Visa","XXXX1111","",0.00,0.00,"",0.00,Dec  2 2014  1:44PM,Dec  2 2014  4:49PM,"voided","41-98426642e8783-0ca","PROFESSIONAL T
2224978574,0,"","A","1","LP5HC0","Y","Visa","XXXX1111","",0.00,0.00,"",0.00,Dec  2 2014  1:17PM,Dec  2 2014  4:49PM,"voided","41-98426642e8783-0ca","PROFESSIONAL T
2225021582,53097,"PROFESSIONAL TITLE","X","1","JS8LR2","Y","Visa","XXXX1111","",2.00,0.00,"",2.00,Dec  3 2014  9:47AM,Dec  3 2014  4:44PM,"settledSuccessfully","41
```

Admin Home Page – View and Print Reports

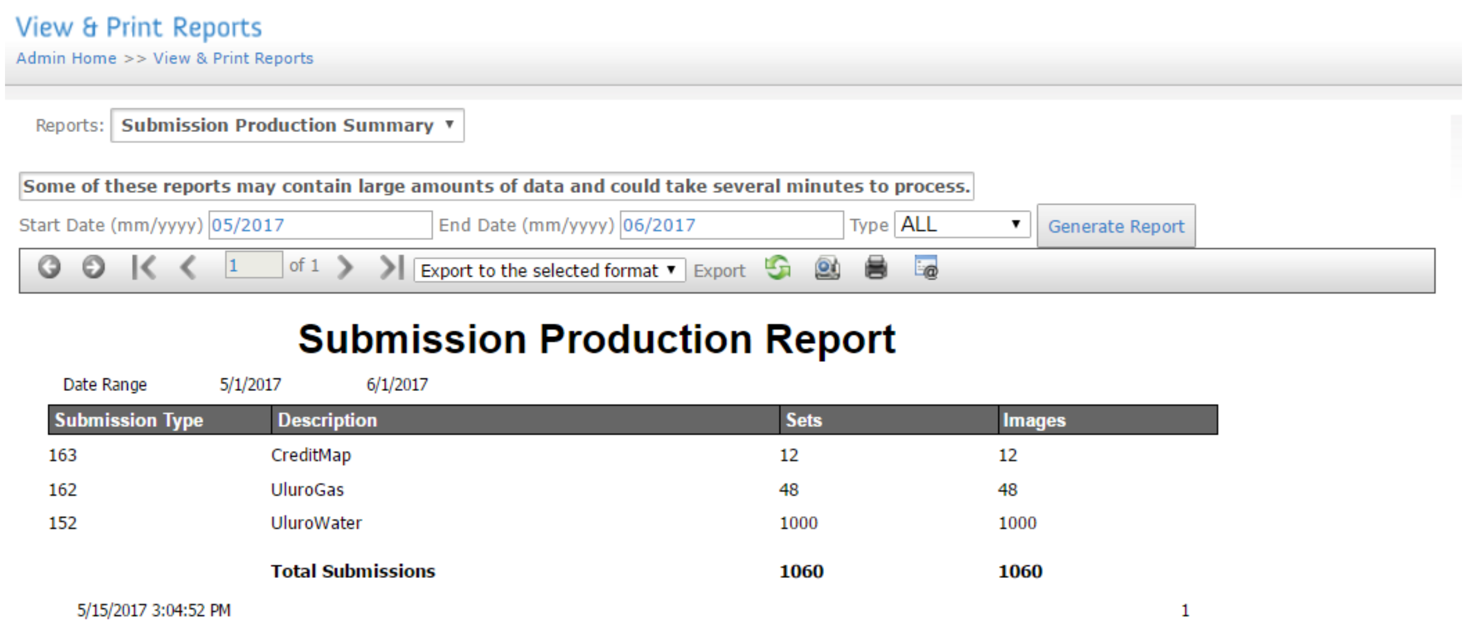
Reports Available:

- Submission Production Summary
- Multi-Channel Delivery
- Payment History
- End User Activity Summary
- End User Activity Detail
- Employee Activity Summary
- Employee Activity Detail
- End User Enrollment
- Disclosure Unacceptance
- Revert Report
- Billing Report Detail
- Billing Summary Sub
- Billing Summary SubType

Select the Report from the dropdown list. Enter the dates for the report to cover Once generated, the report can be exported or saved.

Samples:

Submission Production Summary



View & Print Reports

Admin Home >> View & Print Reports

Reports: Multi-channel Delivery

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 End Date (mm/yyyy) 06/2017 Generate Report

1 of 1 Export to the selected format Export

Multi-Channel Delivery Report

							IVR Calls					
Account #/Name	**Sub ID**	**Sub Type Name**	**Subm ID**	**# SMS**	**# HTML**	**# IVR**	**<= 1:00**	**1:01-2:00**	**2:01-3:00**	**3:01-4:00**	**4:01-5:00**	**5:00+**
Uluro Training Customer 3	152	UluroWater	1480	3	2	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1481	6	2	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1482	2	2	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1485	2	5	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1487	2	5	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1492	2	5	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1496	2	5	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1501	2	5	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1502	2	0	0	0	0	0	0	0	0
Uluro Training Customer 3	152	UluroWater	1504	2	0	0	0	0	0	0	0	0
			Totals -	25	31	0	0	0	0	0	0	0

From: 5/1/2017 12:00:00 To: 6/1/2017 12:00:00 1

View & Print Reports

Admin Home >> View & Print Reports

Reports: Payment History

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 End Date (mm/yyyy) 06/2017 Generate Report

1 of 2 Export to the selected format Export

Payment History Report

Invoice #	Status	Pay Amount	Pay Type	Account #	Date Paid	Trans Date	Payment By
	Pending	$200.00	Credit Card	*************	05/16/2017	05/15/2017	username
	Approved	$53.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$103.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$78.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$28.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$4.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$23.00	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$300.00	Visa	*************	05/15/2017	05/15/2017	username
15435-13	Approved	$31.83	Visa	*************	05/15/2017	05/15/2017	username
	Approved	$5.00	Visa	*************	05/12/2017	05/11/2017	username
	Approved	$230.00	Visa	*************	05/12/2017	05/12/2017	username
	Approved	$230.00	Visa	*************	05/12/2017	05/12/2017	username
	Approved	$230.00	Visa	*************	05/12/2017	05/12/2017	username
	Approved	$230.00	Visa	*************	05/12/2017	05/12/2017	username
	Approved	$50.00	Visa	*************	05/12/2017	05/12/2017	Administrator
	Approved	$480.65	Visa	*************	05/11/2017	05/11/2017	username
	Approved	$201.14	Visa	*************	05/11/2017	05/11/2017	username
	Approved	$361.65	Visa	*************	05/11/2017	05/11/2017	username
	Approved	$480.65	Visa	*************	05/11/2017	05/11/2017	username
	Waiting for Approval	$480.65	Check	*************	05/11/2017	05/11/2017	username
	Waiting for Approval	$480.65	ACH	*************	05/11/2017	05/11/2017	username

End User Activity Summary

View & Print Reports

Admin Home >> View & Print Reports

Reports: End User Activity Summary

Some of these reports may contain large amounts of data and could take several minutes to process.

Generate Report

1 of 1 Export to the selected format Export

End User Activity Summary

Total Enrolled	Total Viewed	May	April	March	February	January	December
		November	October	September	August	July	June
1	7	7	0	0	0	0	0
		0	0	0	0	0	0

5/15/2017 3:14:14 PM 1

End User Activity Detail

View & Print Reports

Admin Home >> View & Print Reports

Reports: End User Activity Detail

Some of these reports may contain large amounts of data and could take several minutes to process.

Generate Report

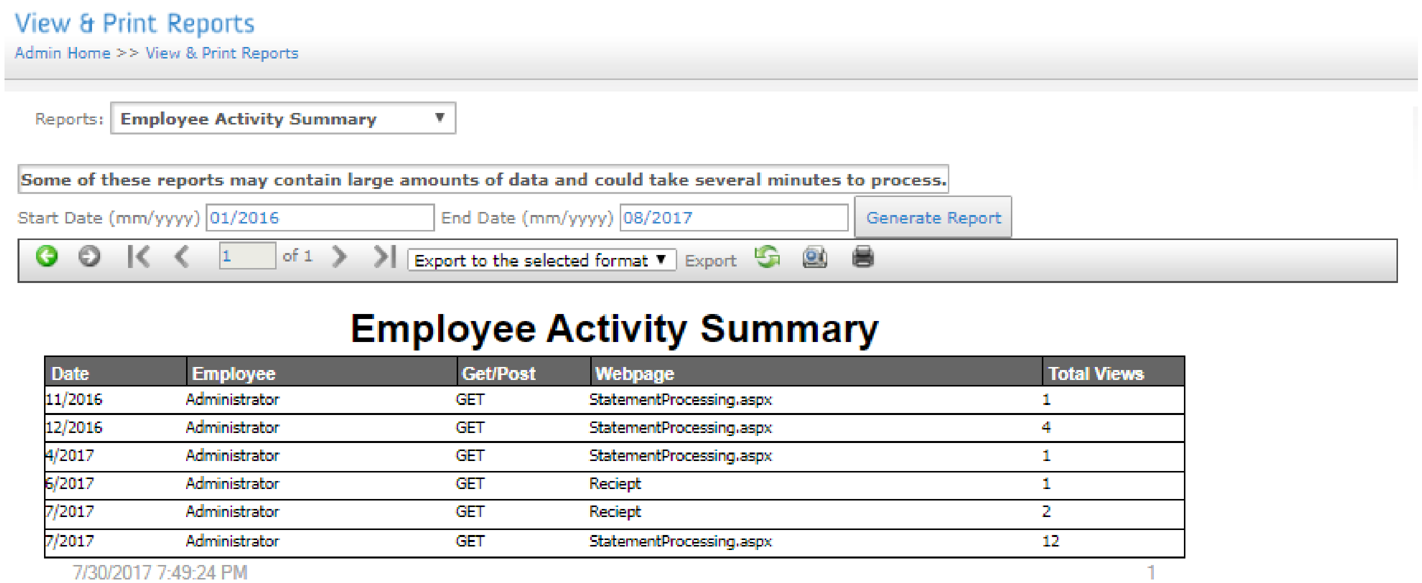
1 of 1 Export to the selected format Export

End User Activity Detail

Account Number	Account Name	Email Address

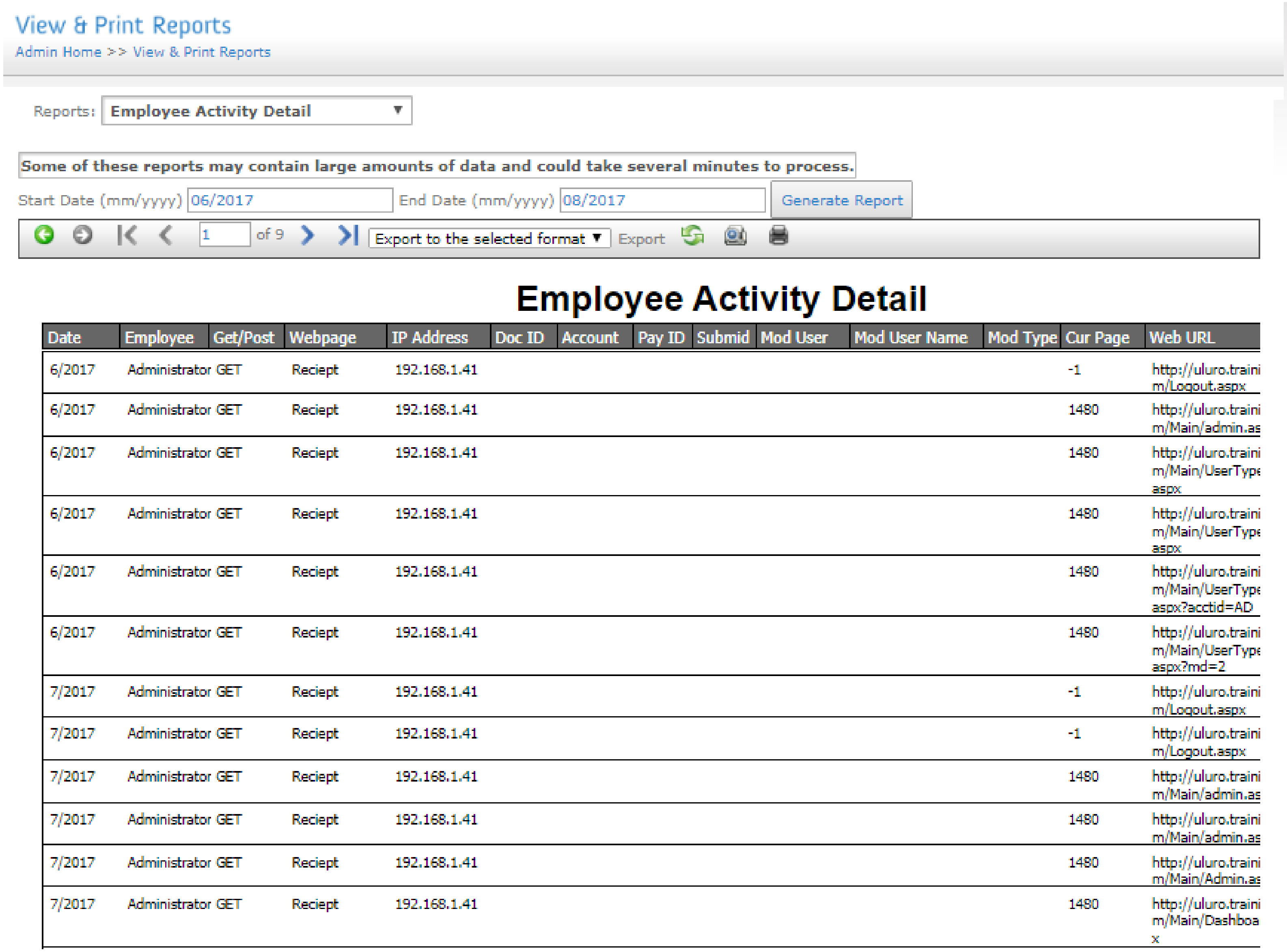
	May	Viewed	Views	April	Viewed	Views	March	Viewed	Views	February	Viewed	Views	January	Viewed	Views	December	Viewed	View
	November	Viewed	Views	October	Viewed	Views	September	Viewed	Views	August	Viewed	Views	July	Viewed	Views	June	Viewed	View
1010123456789 Ms Tiffany Tobin ttobin@transfrm.com Enrolled Y																		
	201705	Y	7	201704	N	0	201703	N	0	201702	N	0	201701	N	0	201612	N	0
	201611	N	0	201610	N	0	201609	N	0	201608	N	0	201607	N	0	201606	N	0
1010123456789 Tiffany Tobin ttobin@transfrm.com Enrolled Y																		
	201705	Y	7	201704	N	0	201703	N	0	201702	N	0	201701	N	0	201612	N	0
	201611	N	0	201610	N	0	201609	N	0	201608	N	0	201607	N	0	201606	N	0

5/15/2017 3:14:44 PM



Date	Employee	Get/Post	Webpage	Total Views
11/2016	Administrator	GET	StatementProcessing.aspx	1
12/2016	Administrator	GET	StatementProcessing.aspx	4
4/2017	Administrator	GET	StatementProcessing.aspx	1
6/2017	Administrator	GET	Reciept	1
7/2017	Administrator	GET	Reciept	2
7/2017	Administrator	GET	StatementProcessing.aspx	12

7/30/2017 7:49:24 PM 1



View & Print Reports

Admin Home >> View & Print Reports

Reports: Employee Activity Detail

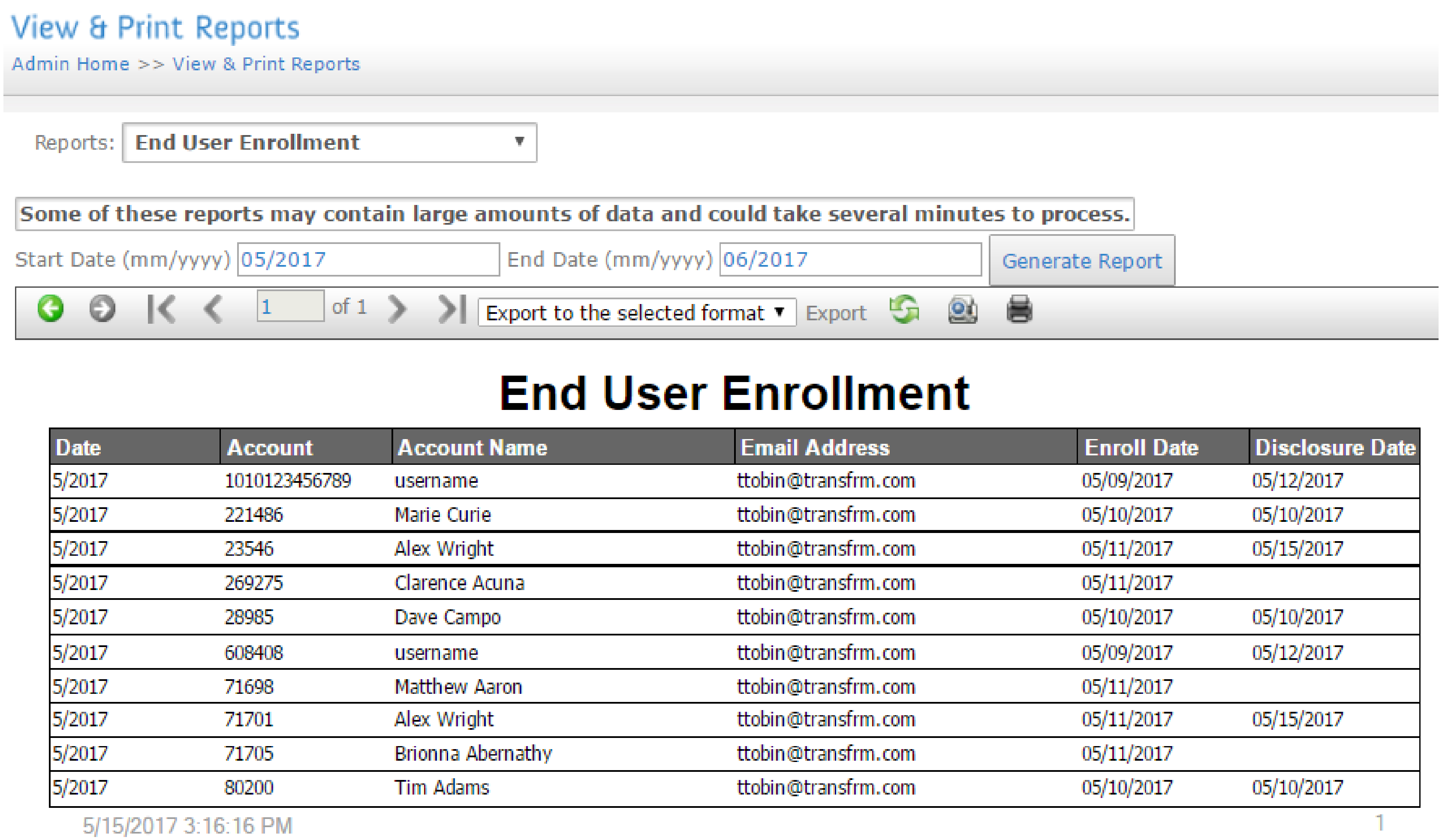
Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 06/2017 End Date (mm/yyyy) 08/2017 Generate Report

1 of 9 Export to the selected format Export

Employee Activity Detail

Date	Employee	Get/Post	Webpage	IP Address	Doc ID	Account	Pay ID	Submid	Mod User	Mod User Name	Mod Type	Cur Page	Web URL
6/2017	Administrator	GET	Reciept	192.168.1.41								-1	http://uluro.traini m/Logout.aspx
6/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/admin.as
6/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/UserType aspx
6/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/UserType aspx
6/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/UserType aspx?acctid=AD
6/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/UserType aspx?md=2
7/2017	Administrator	GET	Reciept	192.168.1.41								-1	http://uluro.traini m/Logout.aspx
7/2017	Administrator	GET	Reciept	192.168.1.41								-1	http://uluro.traini m/Logout.aspx
7/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/admin.as
7/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/admin.as
7/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/Admin.as
7/2017	Administrator	GET	Reciept	192.168.1.41								1480	http://uluro.traini m/Main/Dashboa x



View & Print Reports

Admin Home >> View & Print Reports

Reports: End User Enrollment

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 End Date (mm/yyyy) 06/2017 Generate Report

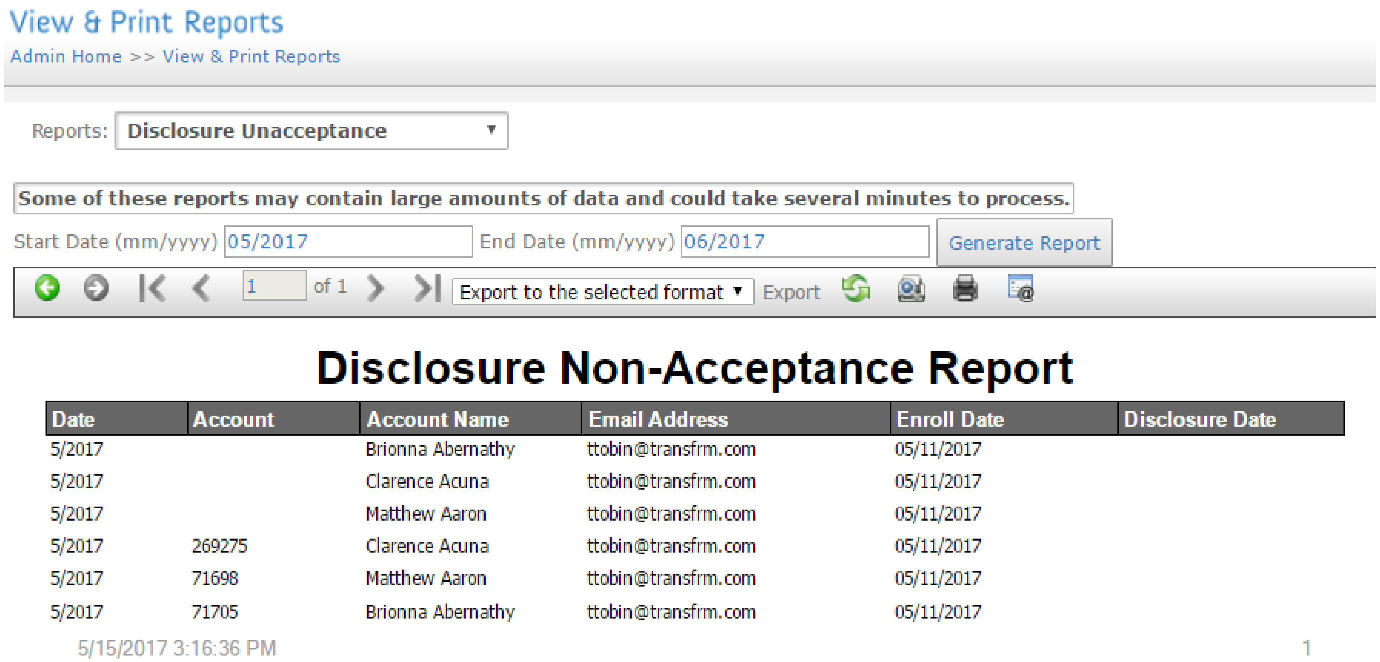
1 of 1 Export to the selected format Export

End User Enrollment

Date	Account	Account Name	Email Address	Enroll Date	Disclosure Date
5/2017	1010123456789	username	ttobin@transfrm.com	05/09/2017	05/12/2017
5/2017	221486	Marie Curie	ttobin@transfrm.com	05/10/2017	05/10/2017
5/2017	23546	Alex Wright	ttobin@transfrm.com	05/11/2017	05/15/2017
5/2017	269275	Clarence Acuna	ttobin@transfrm.com	05/11/2017	
5/2017	28985	Dave Campo	ttobin@transfrm.com	05/10/2017	05/10/2017
5/2017	608408	username	ttobin@transfrm.com	05/09/2017	05/12/2017
5/2017	71698	Matthew Aaron	ttobin@transfrm.com	05/11/2017	
5/2017	71701	Alex Wright	ttobin@transfrm.com	05/11/2017	05/15/2017
5/2017	71705	Brionna Abernathy	ttobin@transfrm.com	05/11/2017	
5/2017	80200	Tim Adams	ttobin@transfrm.com	05/10/2017	05/10/2017

5/15/2017 3:16:16 PM 1

Disclosure Unacceptance

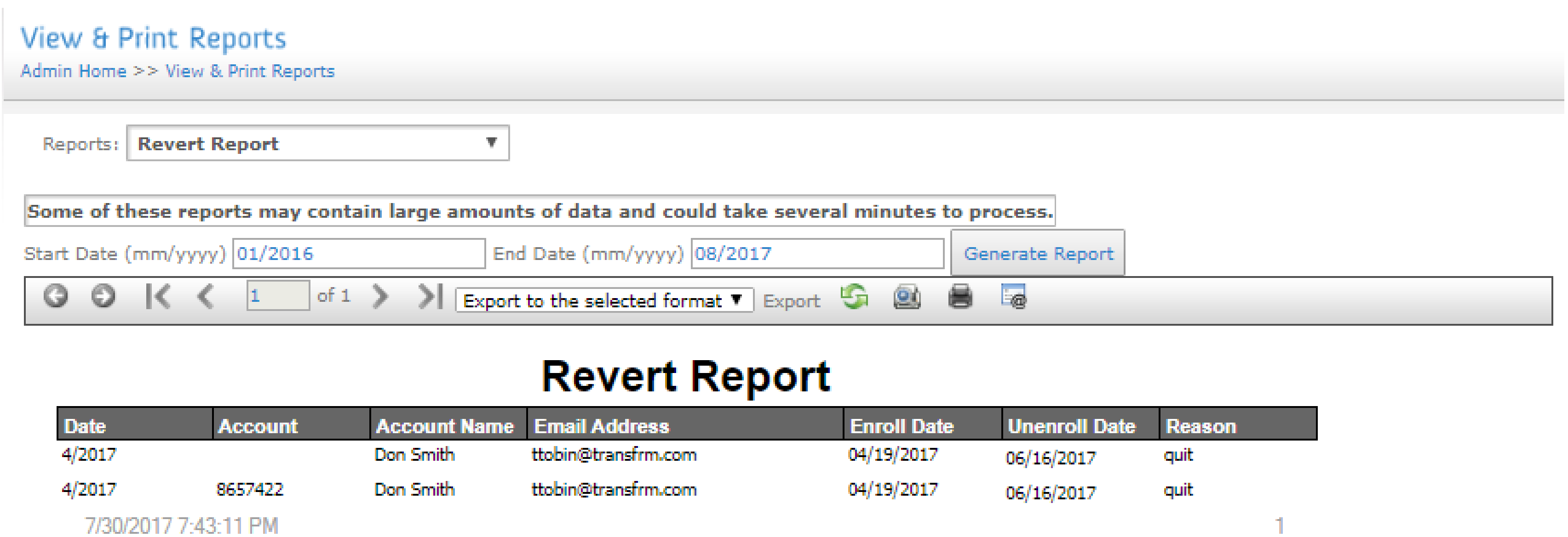


Disclosure Non-Acceptance Report

Date	Account	Account Name	Email Address	Enroll Date	Disclosure Date
5/2017		Brionna Abernathy	ttobin@transfrm.com	05/11/2017	
5/2017		Clarence Acuna	ttobin@transfrm.com	05/11/2017	
5/2017		Matthew Aaron	ttobin@transfrm.com	05/11/2017	
5/2017	269275	Clarence Acuna	ttobin@transfrm.com	05/11/2017	
5/2017	71698	Matthew Aaron	ttobin@transfrm.com	05/11/2017	
5/2017	71705	Brionna Abernathy	ttobin@transfrm.com	05/11/2017	

5/15/2017 3:16:36 PM 1

Revert Report



Revert Report

Date	Account	Account Name	Email Address	Enroll Date	Unenroll Date	Reason
4/2017		Don Smith	ttobin@transfrm.com	04/19/2017	06/16/2017	quit
4/2017	8657422	Don Smith	ttobin@transfrm.com	04/19/2017	06/16/2017	quit

7/30/2017 7:43:11 PM 1

Billing Report Detail

View & Print Reports

Admin Home >> View & Print Reports

Reports: **Billing Report Detail**

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 Generate Report

1 of 28 Export to the selected format Export

Billing Detail

Date	Sub Type ID	Sub Description	Submission ID	Sub Date	Account	Enrolled	Month Active	Year Active
05/2017	152	UluroWater			23546	Y	5	2017
05/2017	152	UluroWater			269275	Y	5	2017
05/2017	152	UluroWater			71698	Y	5	2017
05/2017	152	UluroWater			71701	Y	5	2017
05/2017	152	UluroWater			71705	Y	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	1010123456789	Y	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	119985	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	12458	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	124878	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	12654	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	12964	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	154447	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	15748	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	157486	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	16497	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	16546	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	166544	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	19876	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	213166	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	21348	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	21458	N	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	215489	N	5	2017

View & Print Reports

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Reports: Billing Summary Sub

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 Generate Report

1 of 1 Export to the selected format Export

Billing Summary Sub

Date	Sub Type ID	Sub Description	Submission ID	Sub Date	Number Docs	Enrolled		Year Active
05/2017	163	CreditMap			0	10	5	2017
05/2017	163	CreditMap	1505	May 15 2017 12:00AM	12	2	5	2017
05/2017	162	UluroGas			0	10	5	2017
05/2017	162	UluroGas	1483	May 10 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1484	May 10 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1486	May 11 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1488	May 11 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1489	May 11 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1490	May 11 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1491	May 11 2017 12:00AM	6	5	5	2017
05/2017	162	UluroGas	1503	May 12 2017 12:00AM	6	5	5	2017
05/2017	152	UluroWater			0	10	5	2017
05/2017	152	UluroWater	1480	May 10 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1481	May 10 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1482	May 10 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1485	May 10 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1487	May 11 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1492	May 11 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1496	May 12 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1501	May 12 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1502	May 12 2017 12:00AM	100	5	5	2017
05/2017	152	UluroWater	1504	May 12 2017 12:00AM	100	5	5	2017

5/15/2017 3:17:52 PM 1

View & Print Reports

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Reports: Billing Summary SubType

Some of these reports may contain large amounts of data and could take several minutes to process.

Start Date (mm/yyyy) 05/2017 Generate Report

1 of 1 Export to the selected format Export

Billing Summary by Sub Type

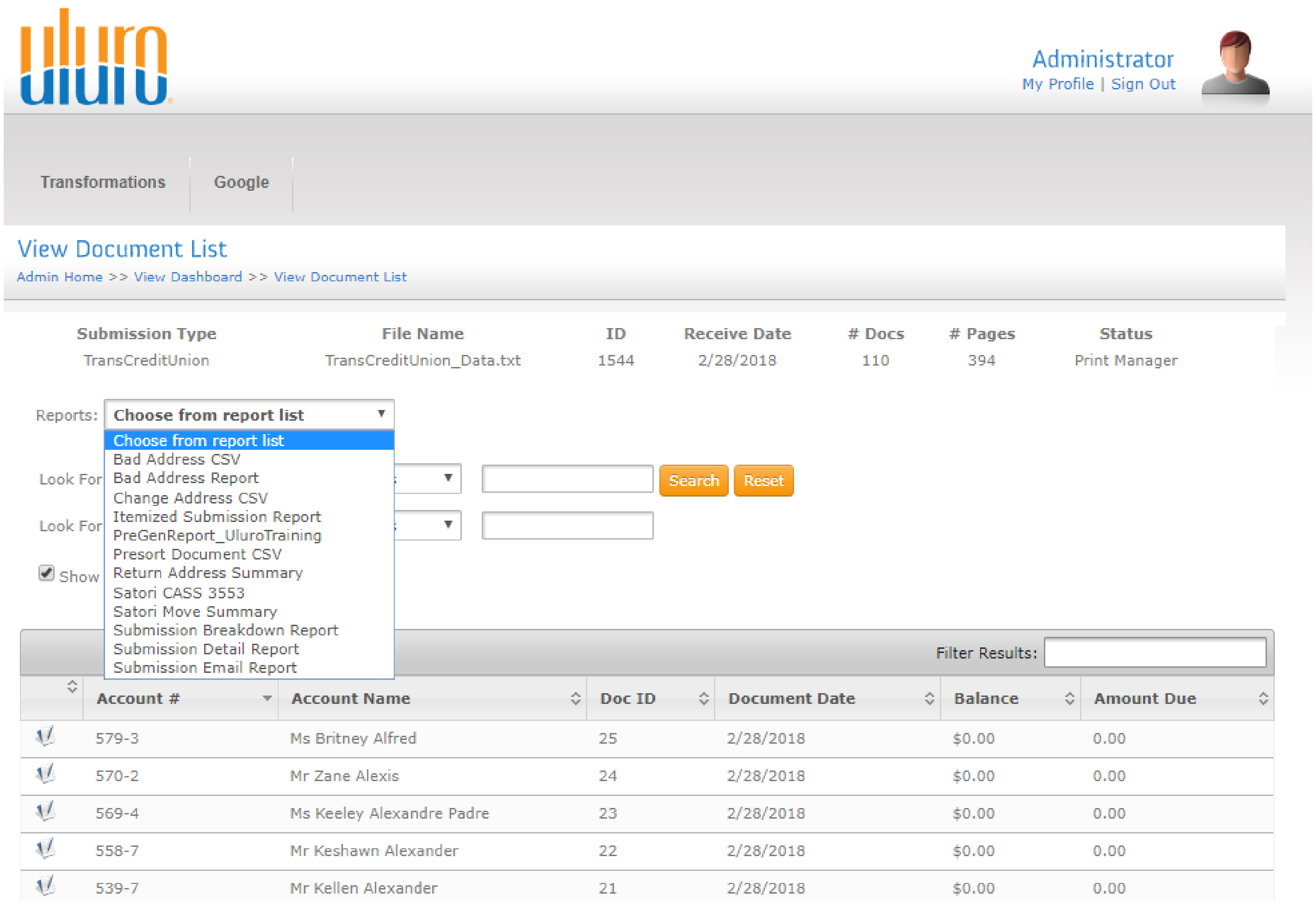
Date	Sub Type ID	Sub Description	Number Docs	Enrolled	Month Active	Year Active
05/2017	163	CreditMap	12	2	5	2017
05/2017	162	UluroGas	48	5	5	2017
05/2017	152	UluroWater	1000	5	5	2017

5/15/2017 3:18:29 PM 1

Dashboard Reports (when viewing a Submission)

Select the Report from the dropdown list. A new tab will display the report. The report can be printed or saved.

This will display any and all of the autoprint reports, pregen report, or custom reports that generated for the ***submission***. All reports that are displayed in the reports tab for a submission within uControl, uDashboard, or uPrint will be availabel within this dropdown list.



Adding Custom Report to Uluro

This document will detail the process of adding a Custom Report to Uluro.

This document will not address how the Report is created. It will only address how the Report will be made visible in Uluro after it has been created.

Create Report

The Report is created outside of Uluro. Currently there is no automated process that will generate Reports outside of Uluro. One Suggestion is to create a Scheduled Task that will check the Status of submissions or Jobs and create reports as necessary. This process would then have to update the Uluro Database to allow Uluro to know that the Report Exists.

To determine the status of submission and the status of a Report for the submission can be accomplished using the following query.

```
select c.submid
from submissions c
where status in ('A','J','C')
and not exists (
select b.subjobrptid
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.submid = c.submid
and a.repdesc = 'Custom Report 1'
and b.createdflag = 'Y'
)
order by c.submid
```

The above will give you a list of Submissions in ‘A’ (Ready to Print), ‘J’ (Job Select), or ‘C’ (Complete and Mailed) statuses where the report ‘Custom Report 1’ is not in the Subjobrpt table or is not marked as created in the Subjobrpt table for the submissions

The report must exist in the Report table or this will produce a list of all submissions.

Database

The Reports table contains the List of available reports for Uluro. All other tables link to this table on the RPTID field. The 1st step in adding a Report to Uluro is to add a record to the Reports table. The fields in the Reports table are

RPTID – Auto Generated. Do NOT attempt to populate this field. When a Record is added it will generate a New RPTID automatically.

RepDesc – varchar(30) – Required. This id the Description of the Report. This description is displayed on the Web.

CreateDate – Datetime – required. If this is left out of the insert query it will be automatically populated with the current date and time.

Createby – Varchar(15) – Required. This is the Person that created the Entry. Some Identifier to indicate who added the record.

Moddate – datetime – not required.

ModBy – varchar(15) – not required.

Status – Varchar(1) – This must be 'A' if the report is to be available.

FileSpec – varchar(40) – This is the File Specification. This will describe the Report Naming Convention for Uluro to locate the correct file. This must be unique and contain %S in the field. Uluro will populate the %S with a 12 digit zero padded field of either the Submid or Jobno depending on Report Type.

Reporttype – varchar(1) – This will be either S for Submission or J for Job. Only Submission Level reports are available on the Web.

AutoGen – Varchar(1) – This will be Y if the report is autogenerated. For Custom reports this should be 'Y'. This means that Uluro is not generating the Report.

ReportDLL – Varchar(50) – This is the DLL that Uluro will call to generate the Report.

AutoPrint – Varchar(1) – With this Y the report will be automatically printed.

PrintOrder –smallint – This is the order in which it is to be printed.

PrintCopies – smallint – This is the number of copies to print.

This is a sample insert query for the Reports table

```
Insert into Reports (repDesc, createdate, createdby, status, filespec, reporttype, autogen)
Values
('Custom Report 1',getdate(), 'Uluro','A'
          'RPT%S.CRP1.PDF','S','Y')
```

This will add to the Report table for a report called 'Custom Report 1'. The createdate will be current date and time. The created by user will be 'Uluro'. The status will be 'A' (active). The filespec will be 'RPT%S.CRP1.PDF'. An example of the report name would be 'RPT000000010000.CRP1.PDF'. The report is a Submission level report. The report is autogenerated.

Only .PDF or .TXT files can be printed and .TXT files will be printed by calculating the largest font size required to put all characters across on a single page.

SubJobRpt

The SubJobRpt table contains a list of the Report that should be available for a Submid or jobno. This table also defines the location of the Report, the Report status and the email status of the Report. The fields in this table are

SubJobRptID – Auto Generated. Do NOT attempt to populate this field. When a Record is added it will generate a New SubJobRPTID automatically.

Submid – Bigint – This should be populated with the Submid if the report is a submission report. This should be null if it is a Job Report.

Jobid – bigint – This should be populated with the Jobid if the report is a Job report. This should be null if it is a Submission report.

RPTID – bigint – This is a link to the Reports table.

CreateDate – datetime - This is the date and time the record was created. This is not the Date the Report was created.

ReportDate – datetime – This is the date and time the report was created.

CreatedFlag – varchar(1). Once the report is created this should be set to 'Y'.

Location – varchar(200). This is the fully qualified path (UNC Path) where the report file is located. The Uluro System must be able to access this directory. The Uluro Reports use the Directory RPT below the Submit directory for location. This must be provided and must be correct or the report will not be found.

Mailitem_id – integer – This is the link to the SQL email system. If the email is created outside of SQL Email then this will have a negative number. If created by SQL Email then this will have a positive number linking to the msdb.dbo.sysmail_allitems view. This should be set to Null.

EmailCreated – Varchar(1) – This will be set to Y when the email is created. This should be set to N or left Null until the Email is created.

Printed – varchar(1) - This will be set to Y when the report is printed. This should be set to N or Left Null until it is printed.

PrintedDate – datetime – This will be the date and time the report was printed. This should be set to Null.

When the Report is created by the external program it should check for a Report in the Subjobrpt table for the Submission or Job with the correct rptid (from the Reports table). If the record exists in the SubjobRPT table it should be updated with the Report date, location, and the createdflag should be set to Y.

If the record does not exists in SubjobRPT table then a record should be added with the Report date, Location, and the createdflag set to Y.

A sample of the Queries:

Check for Record in Subjobrpt table

```
select b.subjobrptid, b.createdflag
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.submid = 200
and a.repdesc = 'Custom Report 1'
```

The above will give you the subjobrptid to be updated. If this is blank then an insert must be performed. The above query looks for report ‘Custom Report 1’ for Submission ID 200. If the report were a Job no report then the query would be

```
select b.subjobrptid , b.createdflag
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.jobid = 200
and a.repdesc = 'Custom Report 1'
```

If it returns a value for subjobrptid then check the Createdflag. If the createdflag = ‘Y’ then the record has already be filled out. If the createdflag = ‘N’ or is null then update the record.

```
update subjobrpt
set reportdate = getdate(),
createdflag = 'Y',
Location = '\\server\dir1\dir2\'
where subjobrptid = 235
```

The above will update subjobrptid 235 with the current date and time, change the createdflag to ‘Y’ and fill out the location of the report file.

If subjobrptid returns blank then you will need to insert a record for the report. This query inserts a record.

```
Insert into subjobrpt
(submid, rptid, createdate,
reportdate, createdflag,location)
values
(200, 25, getdate(),
getdate(), 'Y','\\server\dir1\dir2\')
```

The location should end with \

SysEventrpts

The SysEventRpt table links reports to email events. Only certain email events will email reports. The SystemEvents table contains the list of email events that can be created for a given submission. Only the "Breakpack Reports", "Cleansing Reports", "Presort Submission Reports", "Presort Job Reports", and "BUOB NCOA Reports" events will email reports.

The SysEventRpt table fields are

Event ID – Integer – This should be one of the event id's of the above listed reports.

PRTID – Integer – This should be a report id from the Reports table.

For the report to be emailed with the specified Email event the report must exist at the time the email is created.

Breakpack Reports event will occur after the submission is finished with Breakpack. If the Custom Report does not exist when the Event is run then it will not email the report.

Cleansing Reports event will occur after the submission is finished with Address Cleansing. If the Custom Report does not exist when the Event is run then it will not email the report.

Presort Submission Reports event will occur after the job is finished with Presort. If the Custom Report does not exist when the Event is run then it will not email the report.

Presort Job Reports event will occur after the job is finished with Presort. If the Custom Report does not exist when the Event is run then it will not email the report.

BUOB NCOA Reports event will occur after the job is finished with NCOA. If the Custom Report does not exist when the Event is run then it will not email the report.

Web

If the Report is entered into the Reports table and entered into the SubJobRPT table as a Submission Report then it will automatically be available on the Submission Screen with the rest of the reports.

The SubjobRPT record must have a created flag of 'Y', a valid location for this to work. The Reports table record must have a status of 'A', and the FileSpec must return a valid file name when the %S is substituted with the submission ID. The FileSpec 'RPT%S.big.pdf' would return 'RPT000000001087.big.pdf' if the submission id was 1087.

DNS Configuration for Uluro

Overview

Uluro uses the form

`client.domain.name`

where client is the client name and domain.name is the desired domain.

For example: if my preferred domain was documents.com and I had a customer whose name as ABC, a good url for would be abc.documents.com

This is done to allow a service bureau to host a url in a domain that belongs to their customer. Using the above example: ABC company may have domain named ABC.com and may want their portal to reference portal.abc.com.

Unless a dedicated domain is used the following must be done for every new site added to Uluro:

1. A new DNS A record must be added to the authoritative DNS server for the new URL and must be pointed to the IP address of the Uluro web server.
2. The url must be add to the bindings for the Uluro site in Microsoft Internet Information Server (IIS).

Dedicated Domain

The above approach results in IT involvement for each new client. For this reason, Transformations recommends acquiring a separate domain for the use of the Uluro web server. This domain can be either a root domain such as documents.com or a sub domain such as sites.documents.com. In the latter case the url would be come company.sites.documents.com.

To reduce IT involvement obtain a new domain and ensure it contains a wildcard A record that points to the uluro web server such as:

```
*.domain.name    59    IN    A     10.10.0.1
```

Where domain.name is your domain and 10.10.10.1 is the IP address of the Uluro webserver.

On the Uluro web server ensure that the default binding (*/80) is associated with the Uluro site.

If you have any questions feel free to contact Ulruo Support.

Uluro Glossary

Users:

- ***Uluro User*** – User created that has access to all of the Uluro programs on the Uluro database. This includes every module except for Print Manager.
- ***Print Manager User*** – A user that is created in Print Manager and only has access to log into Print Manager. This user is setup in addition to the Uluro user because Print Manager is on the Print Queue database and not the Uluro database.
- ***Web User*** – A user from admin level to end user that has a login to the web portal.
- ***User Type*** – There are three user types by default: admin, CSR, and end/standard user. Additional user types can be created and customized. Each user type can have multiple users.

CLID/Client/Customer – These terms are used interchangeably and refer to the client setup in uSetup. Each client can have multiple submission types under it. The CLID is the unique number given to each client.

Map – The document that is created using uCompose, our composition tool.

Omit – documents marked not to get printed (excluding e-statements)

Exclude – documents that do not get presorted; can still be printed but not with the standard run

No Mail – documents that are print but not mailed (ex: send to customer)

Presort – in bins for mailing

Cleanse – make sure addresses are correct and updates them

Submission Type – This is where the business rules are setup for a document.

Submission – Every time a data file is submitted and a submission type is processed it is called a single submission. A submission type can have a submission run every month for example.

Job – A job consists of one or more submissions.

Merge Job – Consists of two or more submissions. Documents from either submission are merged into one document (mail piece) based on certain criteria. This can be done by Name, Address, or Account Number.

Combine Job – Consists of two or more submissions. Generally multiple submissions of smaller size are combined to get through Presort at once to receive presort discounts. The number of documents from each submission remains the same during a combine job.

Print Job – Created using a print configuration or manually in uPrint. One job can generate multiple print jobs.

Print File – The file(s) created as part of the print job that is sent to the printer. One print job can have multiple print files created by size or number of documents for example.