



Uluro Web 3.0 Manual

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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 – Click to edit a record.

  Save – Click 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.

  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
- Back 5 records
- Previous record
- Next Record



Navigator:

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

Setup and Initialize the Site

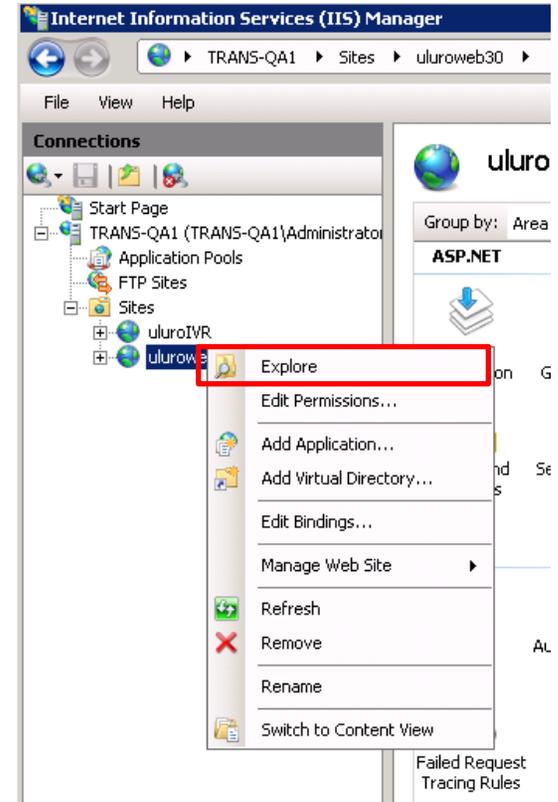
Web Image Directory

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.

Web Database:



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.

The screenshot shows the uSetup application window. The 'Web Setup' button is highlighted in the top right corner. The main window displays a customer list table with columns for CLID, Customer Name, City, State, Zip Code, Status, Web DB, and URL. The row for 'Uluro Training' (CLID 122) is highlighted in blue, and its 'Web DB' and 'URL' columns are also highlighted in red. The 'Web Setup' button is also highlighted in red.

CLID	Anything You ...	Customer Name	City	State	Zip Code	Status	Web DB	URL
125		IS Training uDeliver				ACTIVE		
124		RS Backers				ACTIVE		
117		Template Cust A				ACTIVE	uluro_web30	test.democustomer.com
118		Template Cust B				ACTIVE		
123		Training Customer				ACTIVE	uluro_web30	uluro.trainingsite.com
122		Uluro Training				ACTIVE		

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 typically 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 reflects 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 default 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 Logout URL – This will be the site that users will be directed to when they sign out/logout of the site. It must contain an http:// or https://.



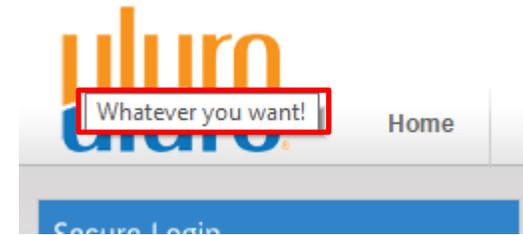
Add User Account to all Submission on login – When an account number is linked to a user, if this is checked, the user will be linked to that same account number for each submission type under this client. Once this is checked, this setting takes effect for all users on the site, even if set up prior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

Page Setup
Initialize Web Site

Administrator User ID: * **Administrator Password: ***

Email Address: *

Copy Pages From: * 0 : Default

Initialize Web Site

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.

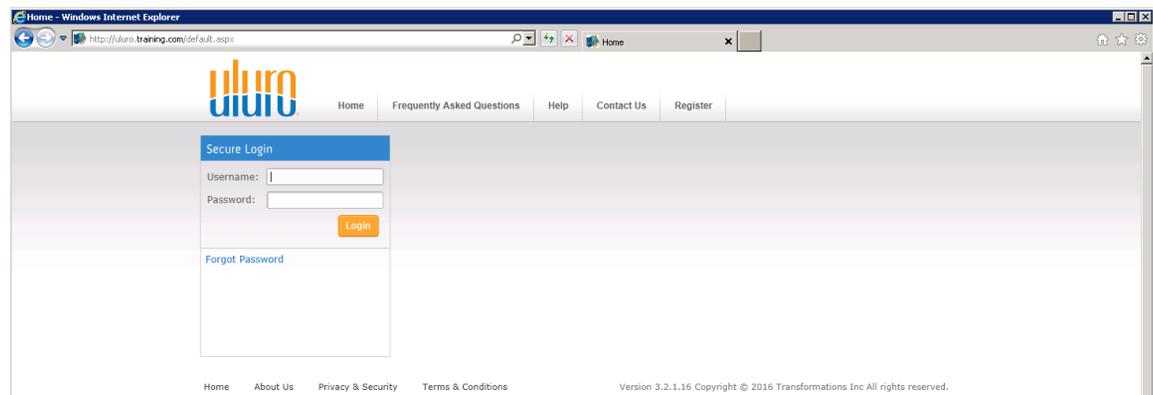
Administrator User ID/Administrator Password – These make up the initial administrator login for the site. This will be the user that you will use to create other users and customize the site. You will use the User ID and Password entered here to log into the site initially. There are no password rules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



Customizing & Designing the Site

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.

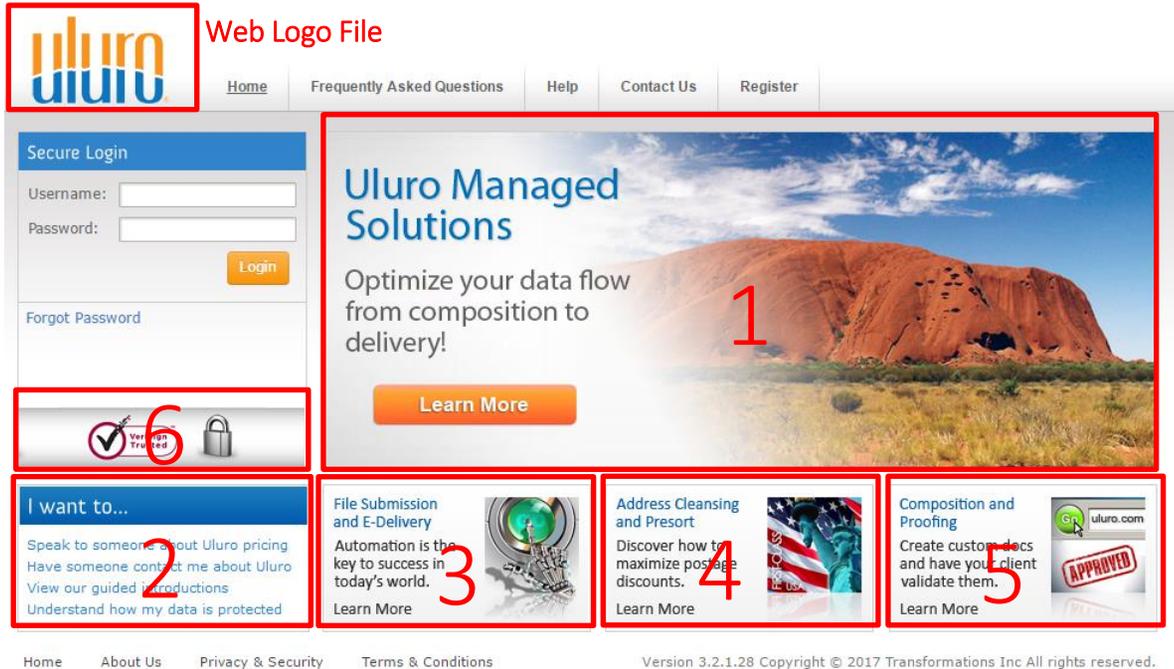
The screenshot shows the 'Advanced' tab in the Uluro Web 3.0 administration interface. The 'Home Page' is selected in the sidebar, and the 'Ads' sub-tab is active. The 'Ads' configuration area includes a form with the following fields:

- Description:** area1
- Image:** UluroTrainingSite\area1.jpg (Note: * Should be a relative path from clientimages folder)
- Hyperlink:** http://www.uluro.com|
- Position:** 1 (with a grid showing positions 1-6)
- Enabled:**
- Open in New Page:**

Buttons for '+ Add', '= Edit', 'Save', 'Cancel Edits', and 'Delete' are visible on the right. Below the form is a table of existing ads:

Description	Image	Hyperlink	Position	Enabled	New Page
area1	UluroTrainingSite\area1.jpg	http://www.uluro.com	1	Y	<input checked="" type="checkbox"/>
area2	UluroTrainingSite\area2.jpg	#	2	Y	<input type="checkbox"/>
area3	UluroTrainingSite\area3.jpg	#	3	Y	<input type="checkbox"/>
area4	UluroTrainingSite\area4.jpg	#	4	Y	<input type="checkbox"/>
area5	UluroTrainingSite\area5.jpg	#	5	Y	<input type="checkbox"/>
area6	UluroTrainingSite\area6.jpg	#	6	Y	<input type="checkbox"/>

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.



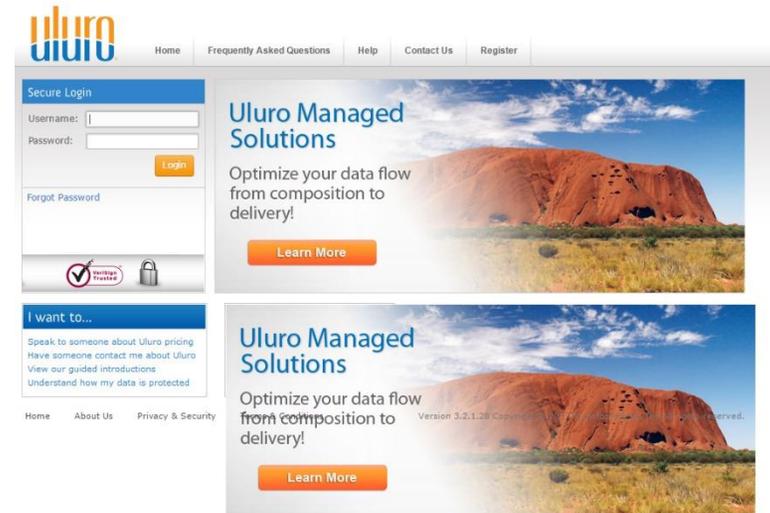
Enabled – If this is checked, the image will appear on the site.

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.

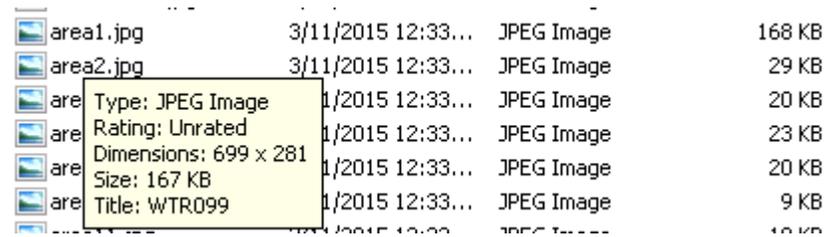


Tips from Transformations:

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.



Basic **Advanced** Page Setup Payments Users Reports

Other **Links** Ads

Admin Page

Home Page

Profile Page

Page HTML/CSS

Description: Home_Desc Edit

Text: Home_Text Save

Link: Custom Custom: http://www.google.com Cancel Edits

CSS Class:

Position: 1 Header Links

Enabled: Footer Links

Open in New Page:

Description	Text	Custom Link	Position	Enabled	New Page
Home_Desc	Home_Text	http://www.google.com	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Frequently Asked Questions	Frequently Asked Questions		2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Help	Help		3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Us	Contact Us		4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Register	Register		5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home	Home		6	<input checked="" type="checkbox"/>	<input type="checkbox"/>
About Us	About Us		7	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Privacy & Security	Privacy & Security		8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Terms & Conditions	Terms & Conditions		9	<input checked="" type="checkbox"/>	<input type="checkbox"/>



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 at 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) position. 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

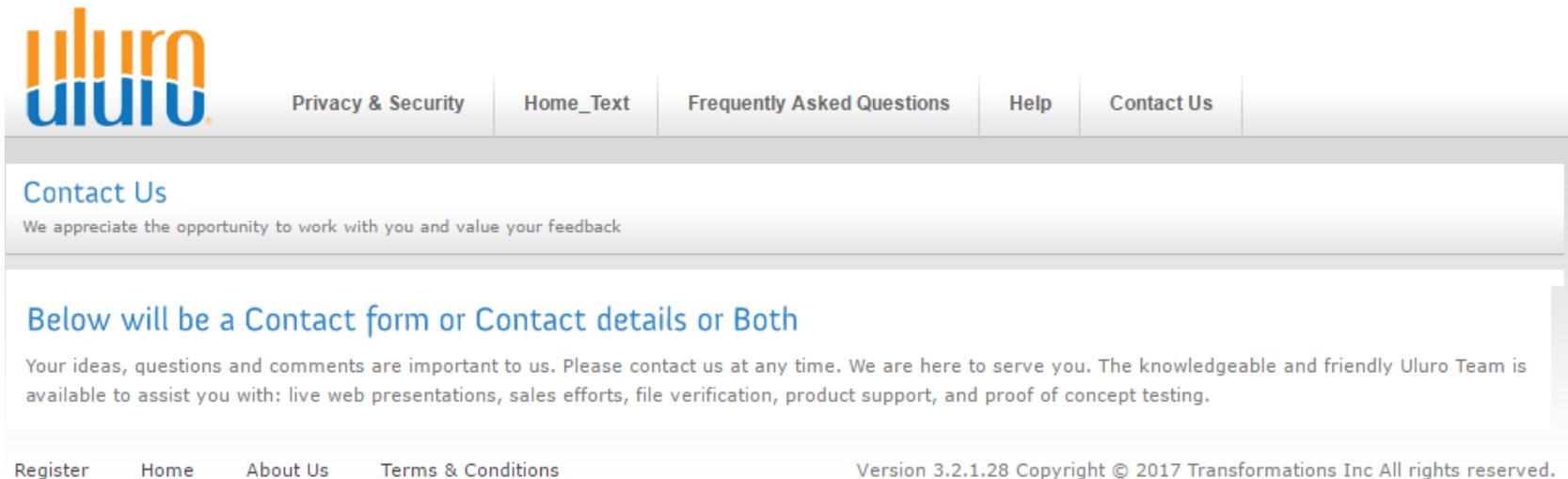
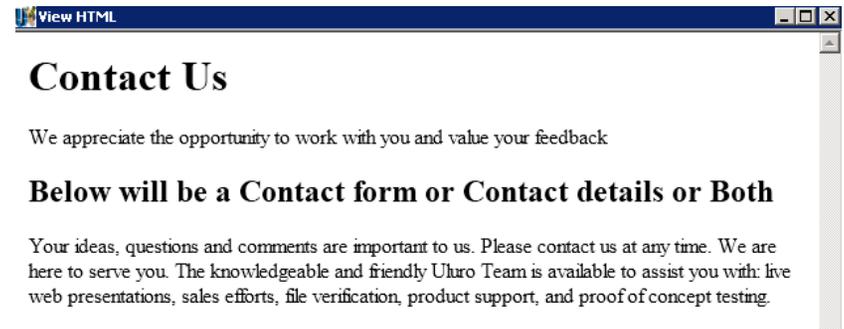
The screenshot shows the 'Advanced' tab selected in the top navigation bar. Below it, the 'Web Page Display' and 'CSS Editor' tabs are visible. The 'Contact Us' link in the main navigation is highlighted with a red box. On the left sidebar, the 'Page HTML/CSS' option is also highlighted with a red box. The main content area displays the HTML code for the 'Contact Us' page, including the header, breadcrumbs, and main content. A 'View HTML' button is visible on the right side of the editor, also highlighted with a red box. The text in the HTML code includes: <div id="crumbWrapper">, <div id="header">, <div class="headerContent">, <h1>, Contact Us</h1>, We appreciate the opportunity to work with you and value your feedback</div>, </div>, </div>, <div id="contentMainWrapper">, <div id="content">, <div id="contentDataNoSidebar" class="pAlign">, <h2>, Below will be a Contact form or Contact details or Both</h2>, <p>, Your ideas, questions and comments are important to us. Please contact us at any time. We are here to serve you. The knowledgeable and friendly Uluro Team is available to assist you with: live web presentations, sales efforts, file verification, product support, and proof of concept testing., </p>, </div>, </div>, </div>

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

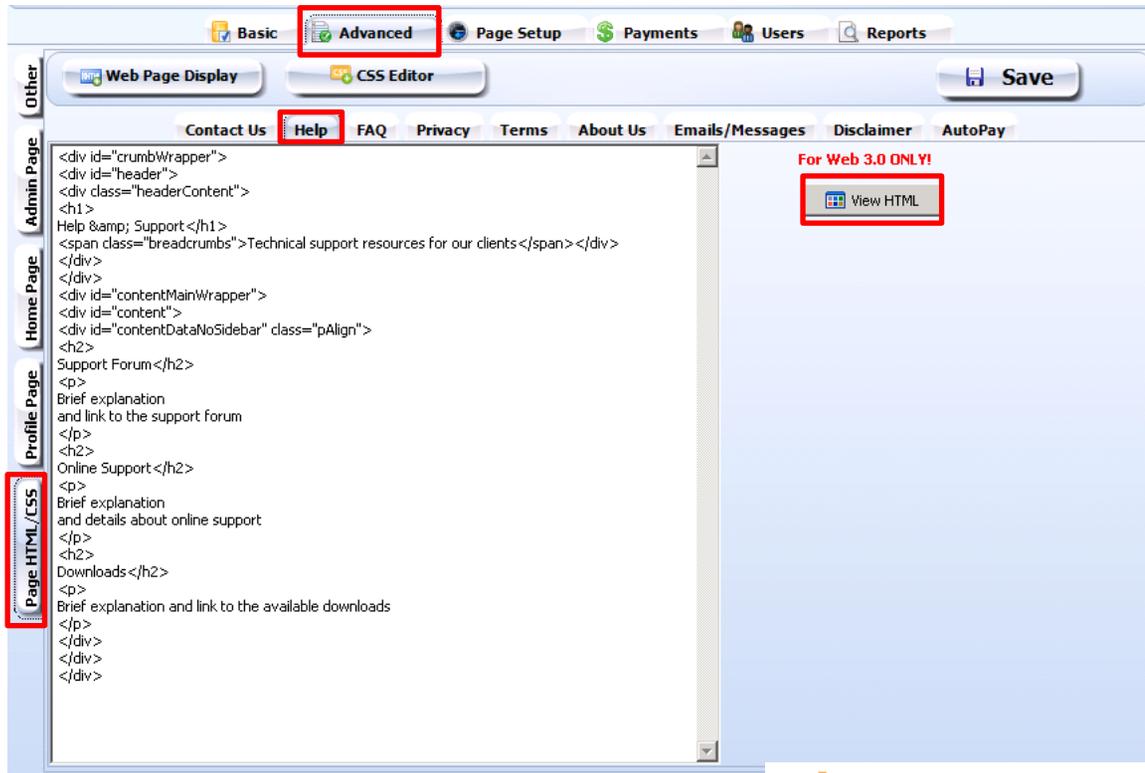
Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:

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



Tips from Transformations:

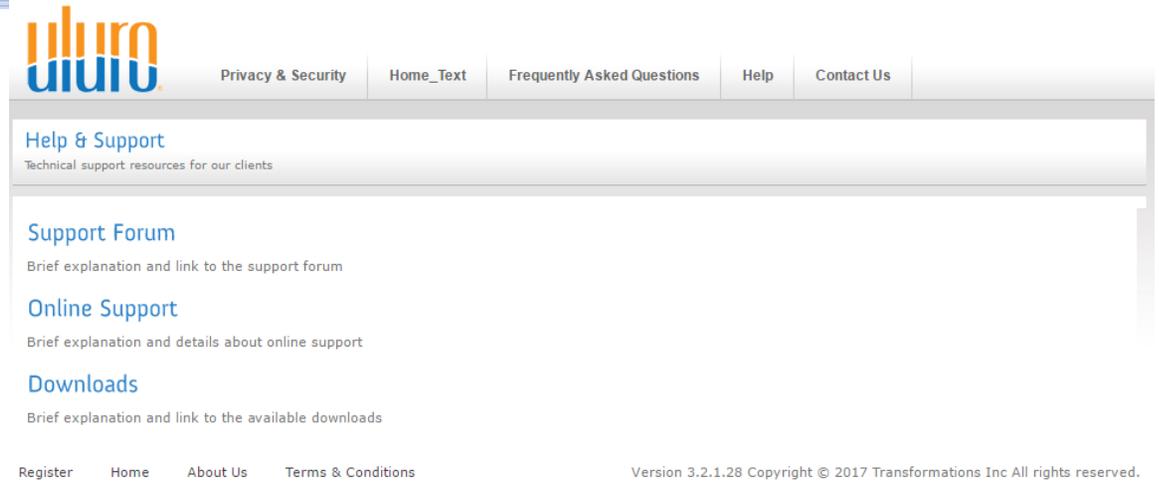
Most of these are just a template of filler text so we recommend editing these before users access the site!

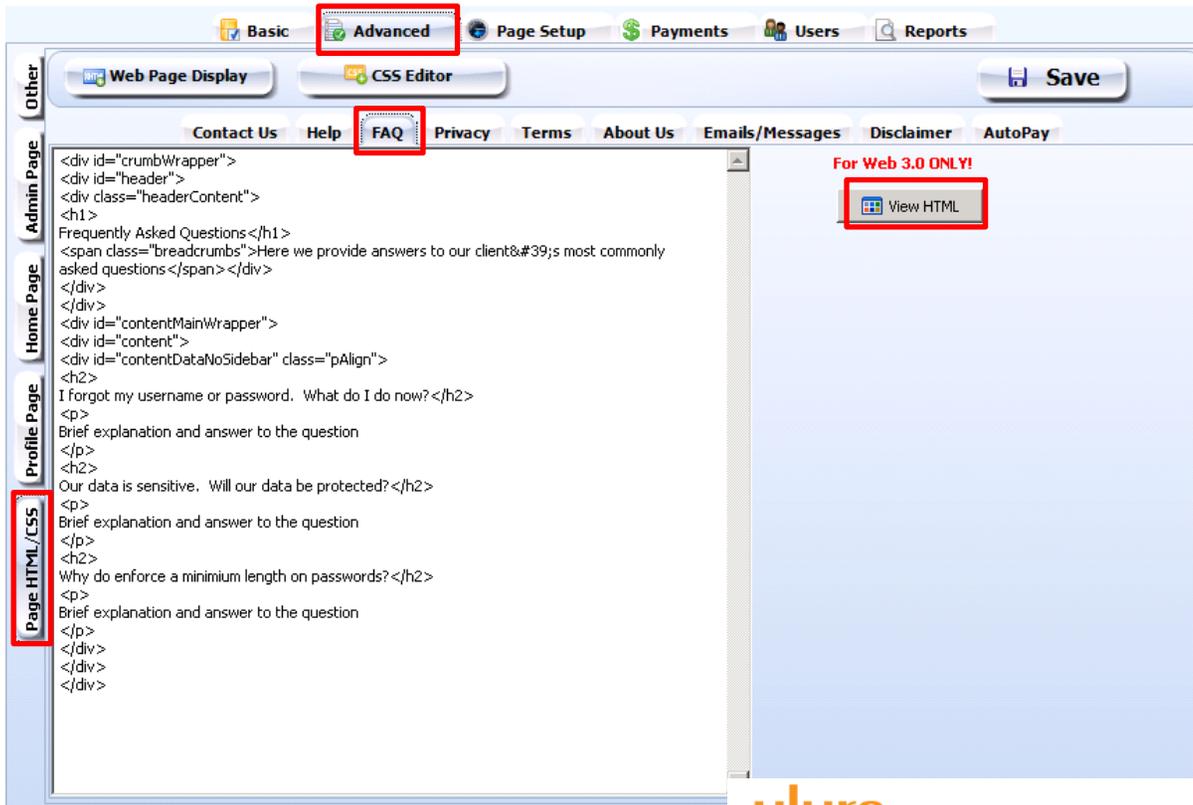


Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:

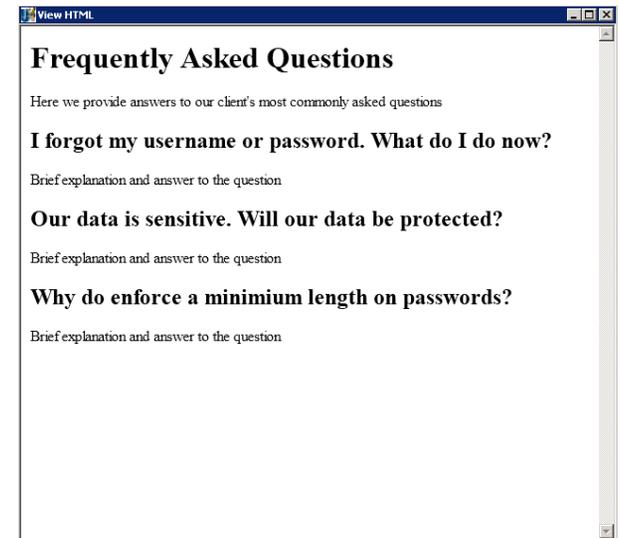


Click the link on the main site page to view the linked page users will be directed to:

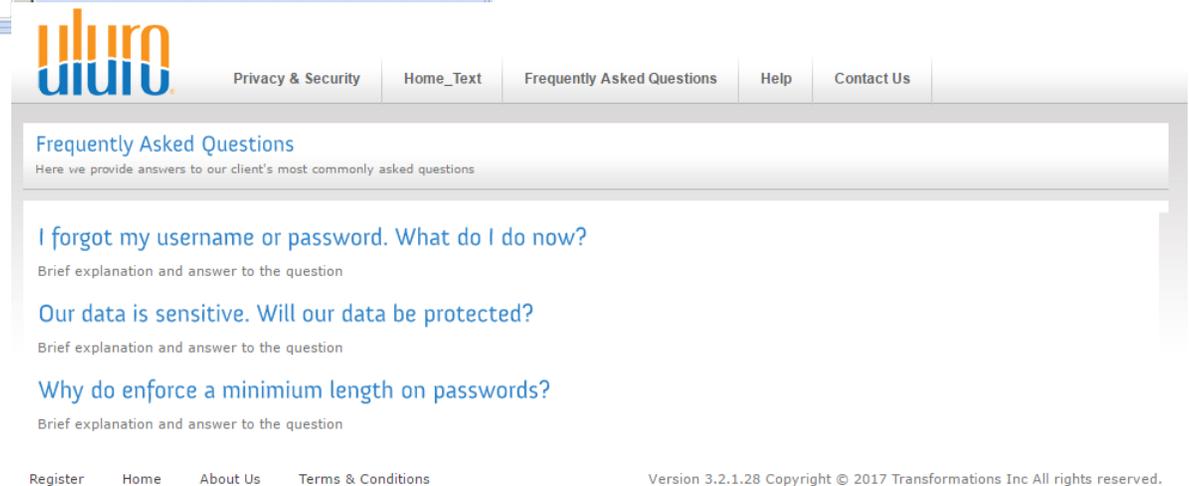




Within the Page HTML/CSS edit the HTML and click View HTML to see how the text will appear:



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



The screenshot shows the Uluro CMS interface. At the top, there are tabs for 'Basic', 'Advanced', 'Page Setup', 'Payments', 'Users', and 'Reports'. The 'Advanced' tab is selected. Below this, there are buttons for 'Web Page Display', 'CSS Editor', and 'Save'. A navigation menu includes 'Contact Us', 'Help', 'FAQ', 'Privacy', 'Terms', 'About Us', 'Emails/Messages', 'Disclaimer', and 'AutoPay'. The 'Privacy' menu item is highlighted with a red box. The main content area displays HTML code for the privacy page, with a 'View HTML' button highlighted in a red box. The code includes a header with 'Privacy & Security' and a main content area with 'Privacy Policy' and 'Security Policy' sections. The footer of the CMS interface shows the Uluro logo and navigation links for 'Privacy & Security', 'Home_Text', 'Frequently Asked Questions', 'Help', and 'Contact Us'.

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

The screenshot shows a browser window titled 'View HTML' displaying the rendered output of the privacy page. The page has a header with 'Privacy & Security' and a main content area with 'Privacy Policy' and 'Security Policy' sections. The text is rendered in a clean, professional font.

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

The screenshot shows the main site page with the 'Privacy & Security' link highlighted. The page has a header with the Uluro logo and navigation links for 'Privacy & Security', 'Home_Text', 'Frequently Asked Questions', 'Help', and 'Contact Us'. The main content area displays the 'Privacy & Security' section with a sub-section for 'Privacy Policy' and 'Security Policy'. The footer of the main site page shows 'Register', 'Home', 'About Us', 'Terms & Conditions', and 'Version 3.2.1.28 Copyright © 2017 Transformations Inc All rights reserved.'

Terms

Basic **Advanced** Page Setup Payments Users Reports

Web Page Display CSS Editor Save

Contact Us Help FAQ Privacy **Terms** About Us Emails/Messages Disclaimer AutoPay

```
<div id="crumbWrapper">
<div id="header">
<div class="headerContent">
<h1>
Terms & Conditions</h1>
<span class="breadcrumbs">Detailed Conditions and terms</span></div>
</div>
</div>
<div id="contentMainWrapper">
<div id="content">
<div id="contentDataNoSidebar" class="pAlign">
<h2>
Conditions</h2>
<p>
Blah blah blah blah
</p>
<h2>
Terms</h2>
<p>
Blah blah blah blah
</p>
</div>
</div>
</div>
</div>
```

For Web 3.0 ONLY!

View HTML

Page HTML / CSS

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

View HTML

Terms & Conditions

Detailed Conditions and terms

Conditions

Blah blah blah blah

Terms

Blah blah blah blah

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

uluro

Privacy & Security Home_Text Frequently Asked Questions Help Contact Us

Terms & Conditions

Detailed Conditions and terms

Conditions

Blah blah blah blah

Terms

Blah blah blah blah

Register Home About Us Terms & Conditions

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About Us

Basic **Advanced** Page Setup Payments Users Reports

Web Page Display CSS Editor Save

Contact Us Help FAQ Privacy Terms **About Us** Emails/Messages Disclaimer AutoPay

```
<div id="crumbWrapper">
<div id="header">
<div class="headerContent">
<h1>
About Us</h1>
<span class="breadcrumbs">Who we are and what we do</span></div>
</div>
</div>
<div id="contentMainWrapper">
<div id="content">
<div id="contentDataNoSidebar" class="pAlign">
<h2>
Our Staff</h2>
<p>
Blah blah blah blah blah
</p>
<h2>
Our Executives</h2>
<p>
Blah blah blah blah blah
</p>
</div>
</div>
</div>
</div>
```

For Web 3.0 ONLY!

View HTML

uluro

Privacy & Security Home_Text Frequently Asked Questions Help Contact Us

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

View HTML

About Us

Who we are and what we do

Our Staff

Blah blah blah blah blah

Our Executives

Blah blah blah blah blah

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

About Us
Who we are and what we do

Our Staff

Blah blah blah blah blah

Our Executives

Blah blah blah blah blah

Register Home About Us Terms & Conditions

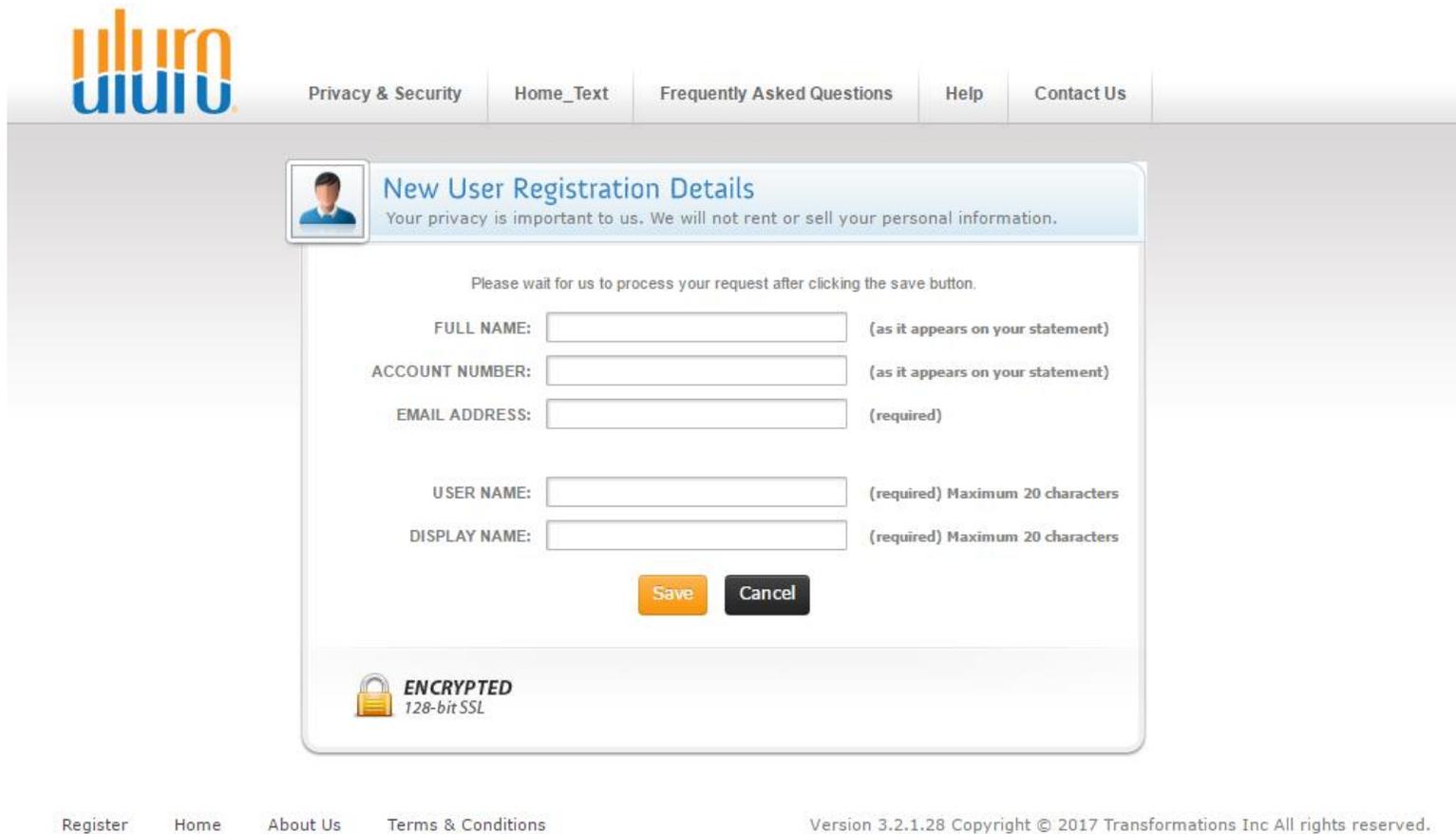
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Home

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:



The screenshot shows the Uluro website's registration page. At the top left is the Uluro logo. A navigation bar contains links for Privacy & Security, Home_Text, Frequently Asked Questions, Help, and Contact Us. The main content area features a 'New User Registration Details' form. The form includes a profile picture placeholder, a privacy notice, and a message: 'Please wait for us to process your request after clicking the save button.' The form fields are: FULL NAME (with a note '(as it appears on your statement)'), ACCOUNT NUMBER (with a note '(as it appears on your statement)'), EMAIL ADDRESS (with a note '(required)'), USER NAME (with a note '(required) Maximum 20 characters'), and DISPLAY NAME (with a note '(required) Maximum 20 characters'). Below the fields are 'Save' and 'Cancel' buttons. At the bottom of the form is an 'ENCRYPTED 128-bit SSL' badge. The footer contains links for Register, Home, About Us, and Terms & Conditions, along with the version number 'Version 3.2.1.28 Copyright © 2017 Transformations Inc All rights reserved.'

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.

The screenshot shows the Uluro Web 3.0 administration interface. At the top, there are tabs for 'Basic', 'Advanced', 'Page Setup', 'Payments', 'Users', and 'Reports'. The 'Advanced' tab is selected, and within it, the 'CSS Editor' button is highlighted with a red rectangle. Other buttons in the 'Advanced' tab include 'Web Page Display' and 'Save'. Below the tabs, there are navigation links: 'Contact Us', 'Help', 'FAQ', 'Privacy', 'Terms', 'About Us', 'Emails/Messages', and 'Disclaimer'. On the left side, there is a vertical sidebar with buttons for 'Other', 'Admin Page', 'Home Page', 'Profile Page', and 'Page HTML / CSS'. The main content area is split into two panes. The left pane contains HTML code for a 'Contact Us' page, including a header, a main content area with a heading and paragraph, and a footer. The right pane is currently empty, with a red text label 'For Web 3.0 ONLY!' and a 'View HTML' button below it.

```
<div id="crumbWrapper">
<div id="header">
<div class="headerContent">
<h1>
Contact Us</h1>
<span class="breadcrumbs">We appreciate the opportunity to work with you and
value your feedback</span></div>
</div>
</div>
<div id="contentMainWrapper">
<div id="content">
<div id="contentDataNoSidebar" class="pAlign">
<h2>
Below will be a Contact form or Contact details or Both</h2>
<p>
Your ideas, questions and comments are important to us. Please contact us at any
time. We are here to serve you. The knowledgeable and friendly Uluro Team is
available to assist you with: live web presentations, sales efforts, file
verification, product support, and proof of concept testing.
</p>
</div>
</div>
</div>
</div>
```

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

The screenshot shows the 'CSS Editor' window with the 'Load CSS File' field highlighted in red, containing the path: `\\.\inetpub\wwwroot\uluroweb\web30\Styles\general.css`. The interface includes tabs for 'Basic Editor' and 'Advanced Editor'. The main content area is divided into 'Main Page / Defaults' and 'Buttons' sections. The 'Main Page / Defaults' section includes settings for Default Text Color, Headers (Admin Home), Default Page Top Links (Home, Terms & Conditions), Default Page Login Box (Secure Client Login), Login Box Labels (Username), Default Page Bottom Links (Contact Us, Register, Privac), Admin Page Category Labels (User Types & Security), Text Entry Boxes (Mr. Administrator), Primary Color, Payment Step Primary Color, Payment Step Secondary Color, Background Gradient, and Header Gradient. Each setting has a color swatch, a 'Font' label, and 'Apply Colors' and 'Load' buttons. The 'Buttons' section includes settings for Default Text Color, Headers (Admin Home), Default Page Top Links (Home, Terms & Conditions), Default Page Login Box (Secure Client Login), Login Box Labels (Username), Default Page Bottom Links (Contact Us, Register, Privac), Admin Page Category Labels (User Types & Security), Text Entry Boxes (Mr. Administrator), Primary Color, Payment Step Primary Color, Payment Step Secondary Color, Background Gradient, and Header Gradient. Each setting has a color swatch, a 'Font' label, and 'Apply Colors' and 'Load' buttons. On the right side, there is a 'Colors To Use' section with 'Font', 'Background', and 'Hover' color pickers, each with an 'Enter Hex Value' field. Below this is a 'Gradients' section with 'From' and 'To' color pickers and 'Enter Hex Value' fields. A 'Flip Colors' button is also present. At the bottom, there is a 'Recently Used Colors' section.

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, background, hover, or gradient color you loaded will be displayed in the Colors to Use Section.

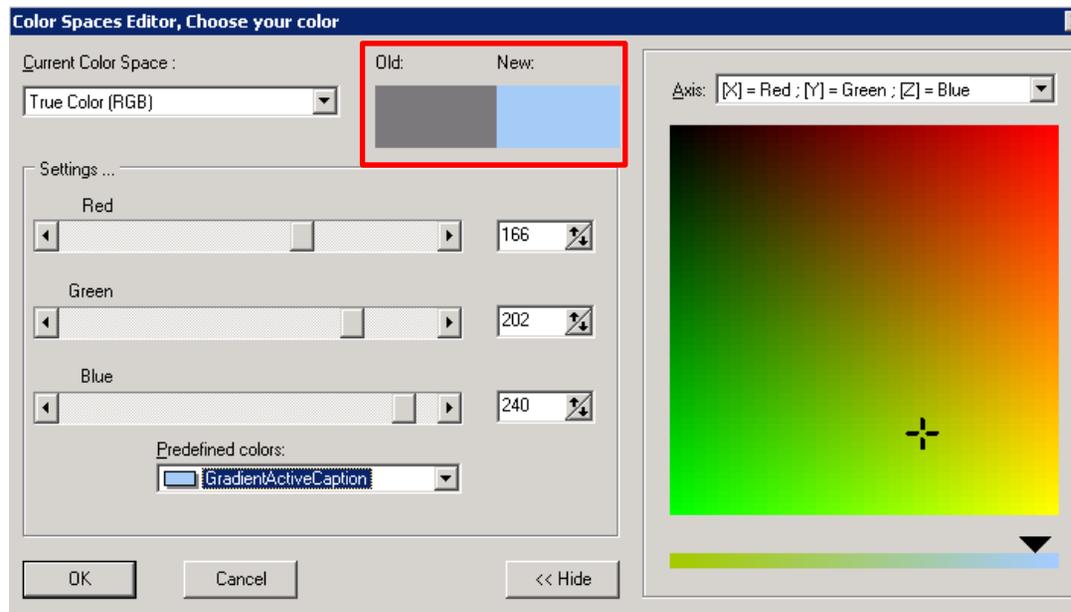
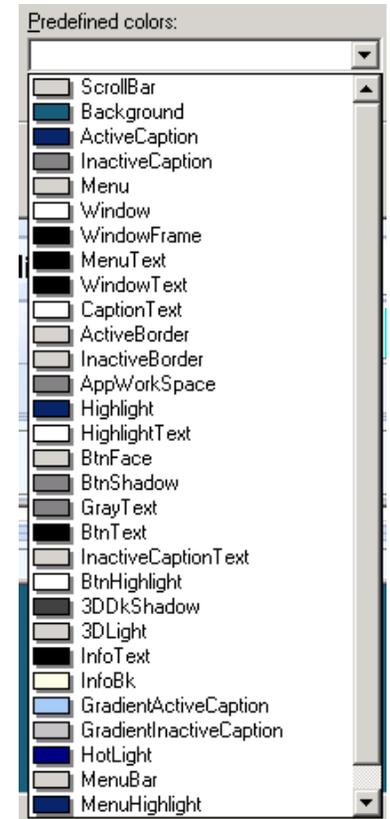
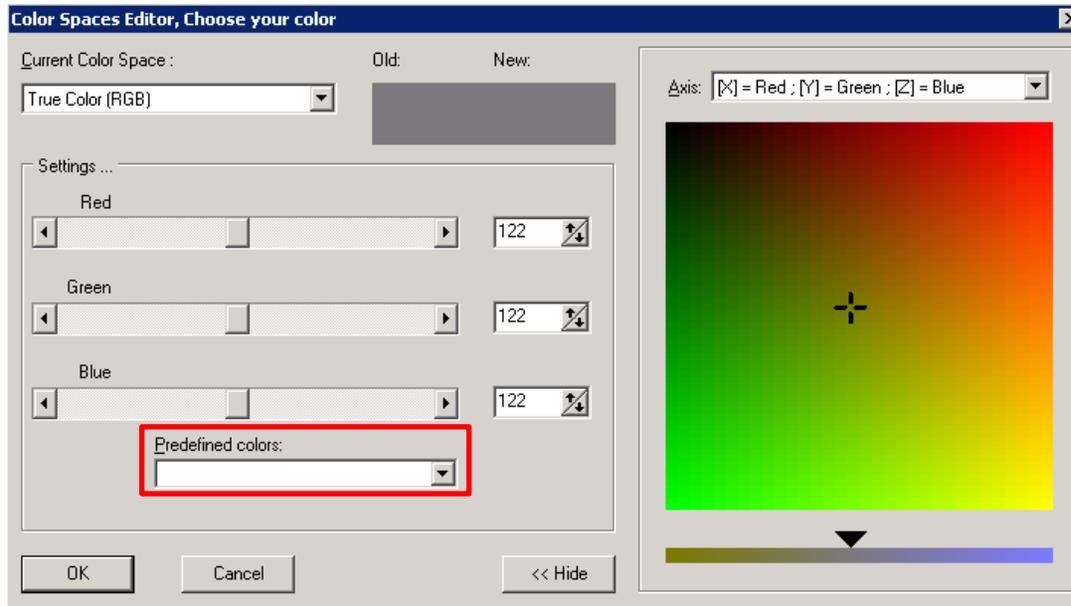
The screenshot shows the CSS Editor interface. At the top, there is a 'Load CSS File' field with the path `\\.\inetpub\wwwroot\uluroweb\web30\styles\general.css` and buttons for 'Publish CSS File' and 'Save Changes'. Below this are 'Basic Editor' and 'Advanced Editor' tabs. The main area is titled 'Main Page / Defaults' and contains several rows of settings, each with a preview, a color swatch, and 'Apply Colors' and 'Load' buttons. The 'Load' buttons for 'Default Text Color' and 'Default Page Login Box' are highlighted with red boxes. On the right side, there is a 'Colors To Use' panel with sections for 'Font', 'Background', 'Hover', and 'Gradients'. Each section has a color swatch and an 'Enter Hex Value:' input field. The 'Font' section has the hex value '7A7A7A', and the 'Background' section has '3184CA'. A 'Flip Colors' button is at the bottom of the panel. Below the main settings is a 'Recently Used Colors' section.

Section	Property	Current Value	Apply Colors	Load
Default Text Color	Font	Grey	✓	Load
	Background	Blue	✓	Load
Headers (Admin Home)	Font	Blue	✓	Load
	Background	White	✓	Load
Default Page Top Links (Home, Terms & Conditions)	Font	White	✓	Load
	Background	Blue	✓	Load
Default Page Login Box (Secure Client Login)	Font	White	✓	Load
	Background	Blue	✓	Load
Login Box Labels (Username)	Font	Grey	✓	Load
	Background	White	✓	Load
Default Page Bottom Links (Contact Us, Register, Privac)	Font	Black	✓	Load
	Hover	Blue	✓	Load
Admin Page Category Labels (User Types & Security)	Font	Blue	✓	Load
	Background	White	✓	Load
Text Entry Boxes (Mr. Administrator)	Font	Grey	✓	Load
	Background	White	✓	Load
Primary Color	Font	Blue	✓	Load
	Background	White	✓	Load
Payment Step Primary Color	Font	Black	✓	Load
	Background	White	✓	Load
Payment Step Secondary Color	Font	Grey	✓	Load
	Background	White	✓	Load
Background Gradient	From	White	✓	Load
	To	White	✓	Load
Header Gradient	From	Black	✓	Load
	To	Cyan	✓	Load

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 predefined 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 selected, 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 screenshot shows the CSS Editor interface with the following components:

- Load CSS File:** C:\inetpub\wwwroot\uluroweb\web30\Styles\general.css
- Buttons:** Basic Editor, Advanced Editor
- Main Page / Defaults:** Default Text Color, Headers (Admin Home), Default Page Top Links (Home, Terms & Conditions), Default Page Login Box (Secure Client Login), Login Box Labels (Username:), Default Page Bottom Links (Contact Us, Register, Privacy), Admin Page Category Labels (User Types & Security), Text Entry Boxes (Mr. Administrator), Primary Color, Payment Step Primary Color, Payment Step Secondary Color, Background Gradient, Header Gradient.
- Colors To Use:** Font (DA2C7A), Background (F0E68C), Hover, Gradients (From, To).

Red boxes highlight the 'Apply Colors' buttons for the 'Admin Home' and 'Mr. Administrator' items, and the 'Font' color swatches for these items.

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 click Apply colors for the change to take effect.

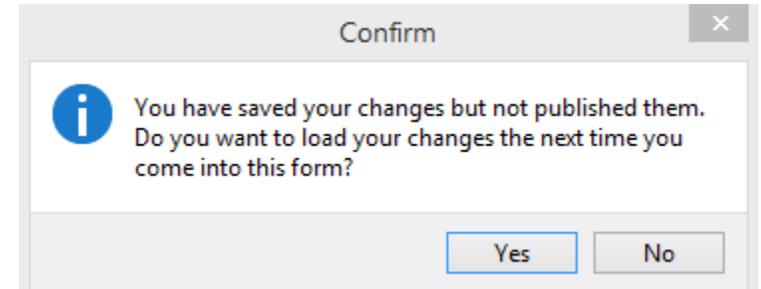
The screenshot shows the CSS Editor window with the following components:

- Window Title:** CSS Editor
- Load CSS File:** C:\inetpub\wwwroot\uluroweb\web30\Styles\general.css
- Buttons:** Publish CSS File, Save Changes
- Editors:** Basic Editor, Advanced Editor
- Section:** Main Page / Defaults, Buttons (highlighted with a red box)
- Buttons List:** A table of buttons with their respective color settings for Font, Background, Gradient (From/To), and Hover. Each button has an 'Apply Colors' button and a 'Load' button.
- Colors To Use:** A section for defining colors with input fields for Font, Background, Gradient From, Gradient To, and Hover, each with an 'Enter Hex Value:' label.
- Recently Used Colors:** A section at the bottom for tracking used colors.

Button	Font	Background	Gradient From	Gradient To	Hover	Apply Colors	Load
Add User	White	Blue	Blue	Blue	Blue	✓	Load
Login	White	Orange	Orange	Orange	Orange	✓	Load
Save	White	Orange	Orange	Orange	Orange	✓	Load
Cancel	White	Black	Black	Black	Black	✓	Load
Search	White	Orange	Orange	Orange	Orange	✓	Load
Pay Now	White	Orange	Orange	Orange	Orange	✓	Load
Approve	White	Green	Green	Green	Green	✓	Load
Reset	White	Blue	Blue	Blue	White	✓	Load
SMS Messages	White	Blue	Blue	Blue	Blue	✓	Load
HTML Emails	White	Blue	Blue	Blue	Blue	✓	Load
>>	White	Black	Black	Black	Black	✓	Load

Saving Changes

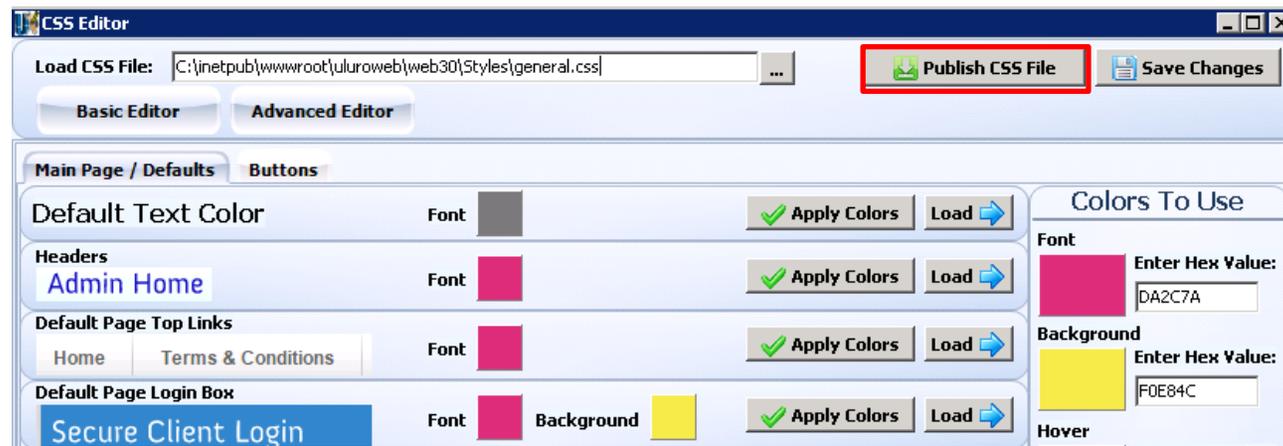
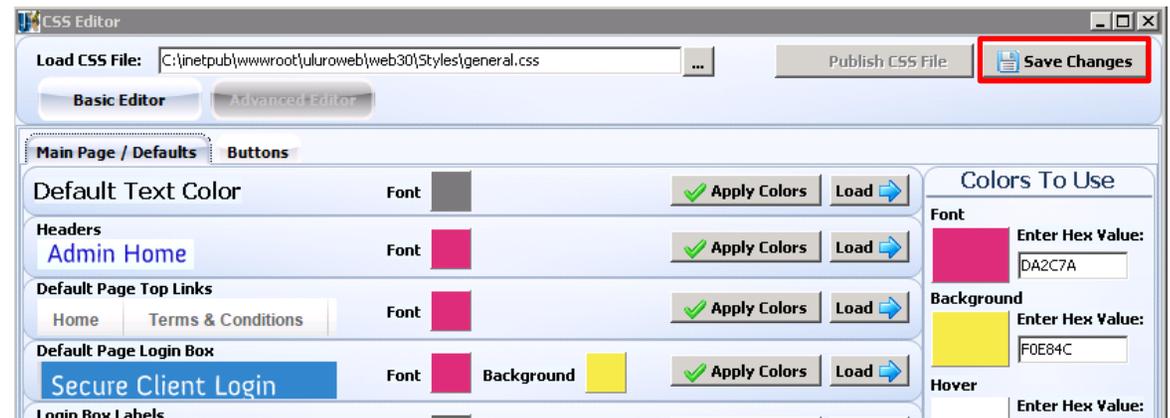
Anytime during the process, you can save your changes by clicking on the Save Changes button. The changes are saved locally to a temporary file and ARE NOT VIEWABLE ON THE WEB! However, if you need to exit the editor, the program will tell you that you have saved your changes and not published them. It will ask “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.



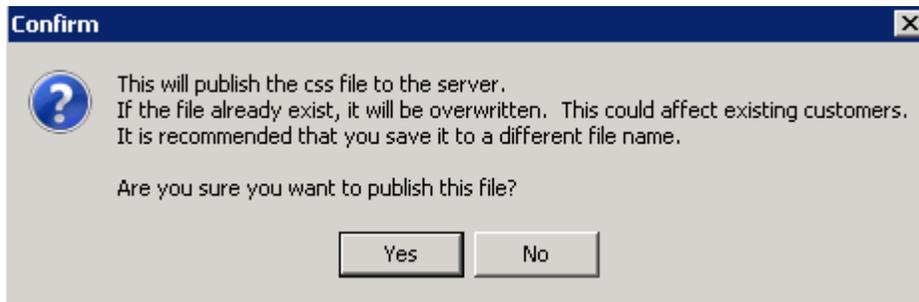
When the color changes to the CSS are complete, click on Save Changes at the top.

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.

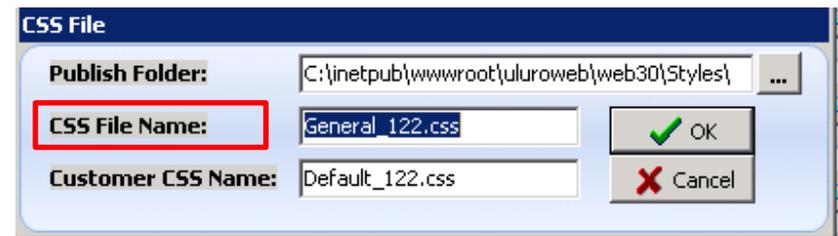


You will be asked to Confirm the changes before publishing:



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.

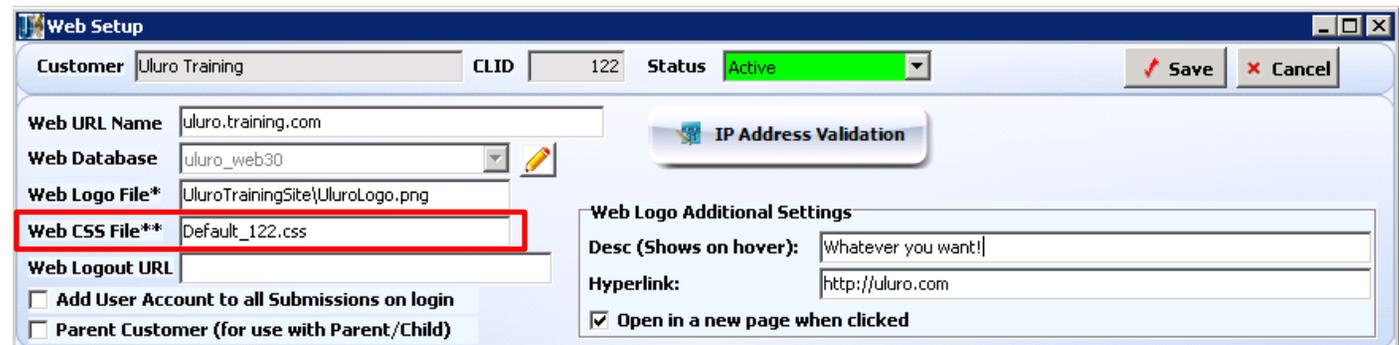


Tips from Transformations:

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:

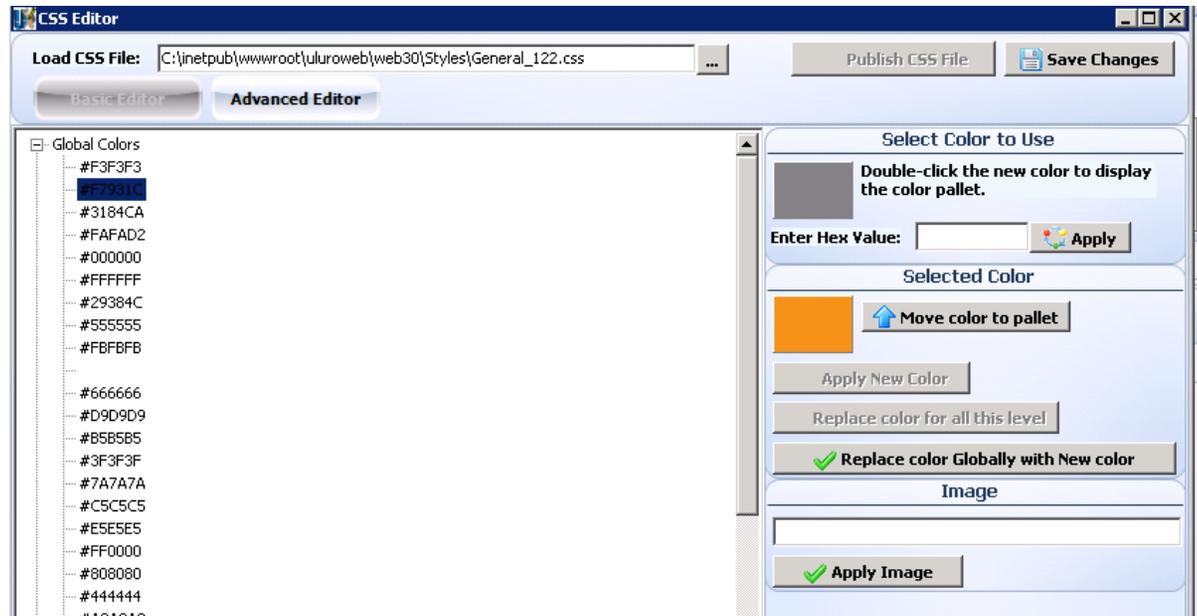


Advanced Editor

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.

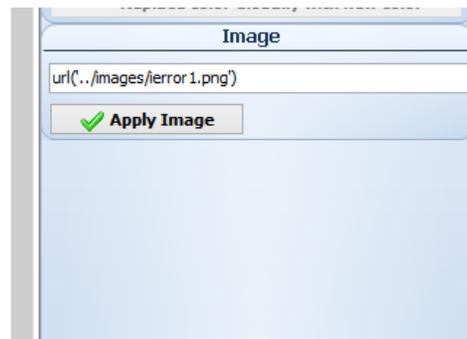
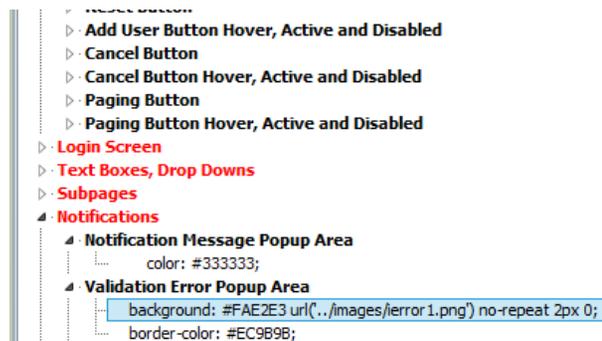
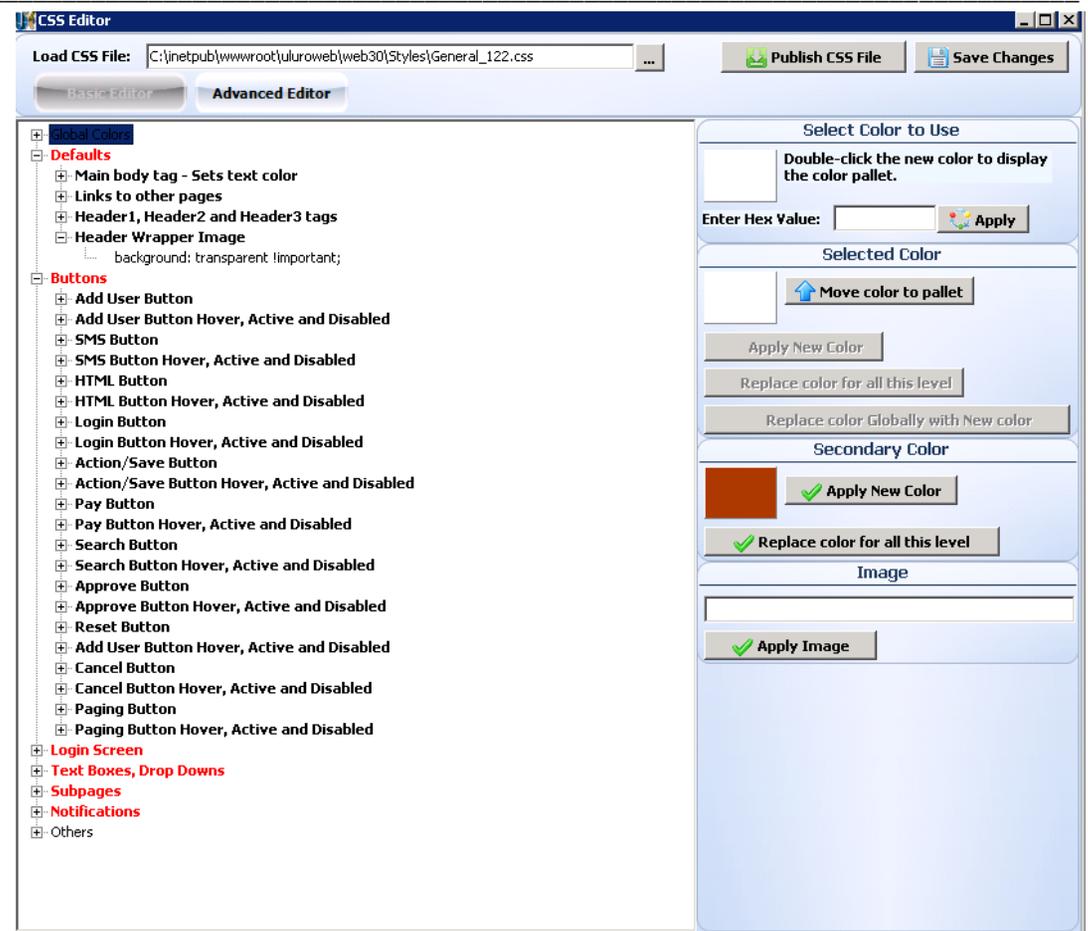
Click Move color to pallet to move the selected color into the Color to Use section. Once there, you can edit the color and click apply to apply changed for that setting.

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 Activity and Payments & Payment History features.

The screenshot shows the 'Admin Home' page. At the top right, there is a user profile for 'Administrator' with a 'My Profile | Sign Out' link and a user avatar. Below this is a navigation bar with 'Admin Home' and 'Admin Home' links. The main content area features a grid of nine menu items, each with an icon, a title, and a description. Red numbers 1 through 9 are placed to the right of each menu item to identify them:

- 1. **Manage Users**: This section enables administrators to manage user accounts, accessibility, and permissions.
- 2. **User Types & Security**: This section enables administrators to manage user accounts, accessibility, and permissions.
- 3. **Web Proofing**: This section allows review of the Submissions and Documents and Approval of Submissions before additional processing.
- 4. **Search Records**: This section allows searching for individual user documents.
- 5. **Dashboard**: This section allow display of the current status of all submissions.
- 6. **View & Print Reports**: This section allows global reports to be viewed or downloaded.
- 7. **Payment Activity**: This section enables administrators to manage payments and view payment history.
- 8. **Payments & Payment History**: This section enables administrators to manage payments and view payment history.
- 9. **Upload Files**: This section enables administrators to upload files to the server.

The position, text, images, etc for each of these 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.

The screenshot shows the 'Advanced' tab in the Uluro Web 3.0 Admin interface. The 'Admin Page' tab is selected, and the 'Dashboard.aspx' link is being configured. The 'Body Text' field contains the text: 'This section allow display of the current status of all submissions.' Below the form is a table listing all links and their configurations.

Web Page	Image	Link Text	Display	Order	Body Text
Management.aspx	uUsers.png	Manage Users	Y	1	This section enables administrators to manage user account
UserTypeMaint.aspx	uSecurity.png	User Types & Security	Y	2	This section enables administrators to manage user account
webproof.aspx	uWebProof.png	Web Proofing	Y	3	This section allows review of the Submissions and Document
search.aspx	uSearch.png	Search Records	Y	4	This section allows searching for individual user documents.
Dashboard.aspx	uSettings.png	Dashboard	Y	5	This section allow display of the current status of all submis:
ReportSubmission.aspx	uReport.png	View & Print Reports	Y	6	This section allows global reports to be viewed or download
default.aspx	Invoice-icon.png	Payment Activity	Y	7	This section enables administrators to manage payments ar
PaymentList.aspx	uPayments.png	Payments & Payment History	N	7	This section enables administrators to manage payments ar
Upload.aspx	uUpload.png	Upload Files	Y	8	This section enables administrators to upload files to the se

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 have 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.

Web Page	Image	Link Text	Display	Order	Body Text
Management.aspx	uUsers.png	Manage Users	Y	1	This section enables administrators to manage user account
UserTypeMaint.aspx	uSecurity.png	User Types & Security	Y	2	This section enables administrators to manage user account
webproof.aspx	uWebProof.png	Web Proofing	Y	3	This section allows review of the Submissions and Document
search.aspx	uSearch.png	Search Records	Y	4	This section allows searching for individual user documents.
Dashboard.aspx	uSettings.png	Dashboard	Y	5	This section allow display of the current status of all submis:
ReportSubmission.aspx	uReport.png	View & Print Reports	Y	6	This section allows global reports to be viewed or download
default.aspx	Invoice-icon.png	Vantiv Payment Activity	Y	7	This section enables administrators to manage payments ar
PaymentList.aspx	uPayments.png	Payments & Payment History	Y	7	This section enables administrators to manage payments ar
Upload.aspx	uUpload.png	Upload Files	Y	3	This section enables administrators to upload files to the s

Admin Home

Admin Home



Manage Users

This section enables administrators to manage user accounts, accessibility, and permissions.



User Types & Security

This section enables administrators to manage user accounts, accessibility, and permissions.



Web Proofing

This section allows review of the Submissions and Documents and Approval of Submissions before additional processing.



Upload Files

This section enables administrators to upload files to the server.



Search Records

This section allows searching for individual user documents.



Dashboard

This section allow display of the current status of all submissions.



View & Print Reports

This section allows global reports to be viewed or downloaded.



Vantiv Payment Activity

This section enables administrators to manage payments and view payment history.



Payments & Payment History

This section enables administrators to manage payments and view payment history.



Tips from Transformations:

These settings can all be disabled under an admin user's security 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.

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.

The screenshot shows the 'Manage Users' page. At the top right, the user is identified as 'Administrator' with a 'My Profile | Sign Out' link and a user icon. The main heading is 'Manage Users' with a breadcrumb 'Admin Home >> Manage Users'. Below this is a search bar with 'Look For:' set to 'Account' and 'Which:' set to 'equals'. There are 'Search', 'Reset', and 'Add User' buttons. The 'Add User' button is highlighted with a red box. Below the search bar is a table with columns: Account, Username, Full Name, Email Address, Phone, Type, Status, Email, and Print. The table contains one row for the 'admin' user, with 'Full Name' set to 'Administrator' and 'Email Address' set to 'ttobin@transfrm.com'. A 'Filter Results:' input field is located above the table.

The screenshot shows the 'Add New User' form. The heading is 'Add New User' with a sub-heading 'Enter details about the new user including account information.' The form contains several fields: 'FULL NAME:' (required), 'STATUS:' (Select One... required), 'USER TYPE:' (Select One... required), 'EMAIL ADDRESS:' (required), 'USERNAME:' (required, Maximum 20 Characters), 'PASSWORD:' (required, minimum 8 characters), and 'ACCOUNT EXPIRES:'. At the bottom, there are 'Save User' and 'Cancel' buttons. A security notice at the bottom left states 'ENCRYPTED 128-bit SSL'.

The screenshot shows the 'Profile Maintenance' page. At the top right, the user is identified as 'Administrator' with a 'My Profile | Sign Out' link and a user icon. The main heading is 'Profile Maintenance' with a breadcrumb 'User Main >> Profile Maintenance'. Below this is a 'My Profile' section with a sub-heading 'Your privacy is important to us. We will not share your personal information.' The 'FULL NAME:' field is highlighted with a red box and contains the text 'Full Name'. Below it is the 'ADDRESS 1:' field, which is required. To the right, there is a 'Profile Management' section with links for 'Manage My Profile' and 'Manage Password & Email'.

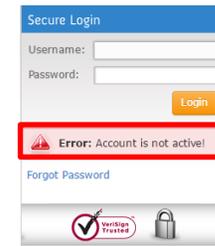
Status – This should be active when creating a new user. If the others are selected users will not be notified of their account nor will users be able to login to the site.

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.

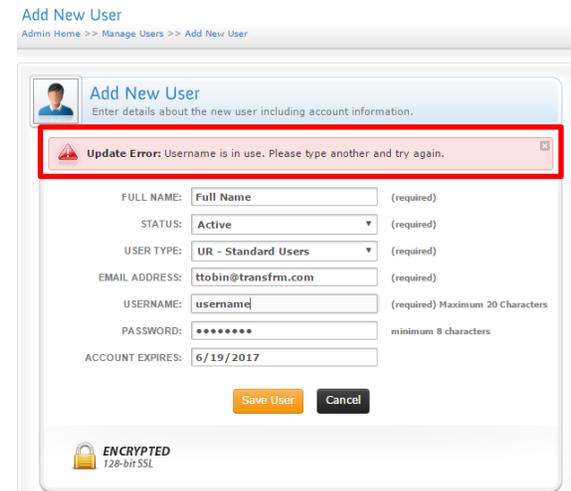
Username – This must be unique for each user on the site. If it is already in use, you will get an error.

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

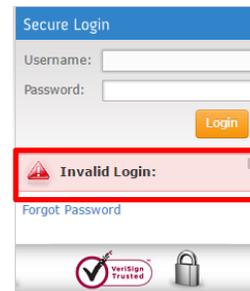


Tips from Transformations:

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.

Manage Users
Admin Home >> Manage Users

Look For: **Account Name** Which: **equals** **Search** **Reset** **Add User** << 1 2 >>

User Status: **All**

Filter Results:

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.

Basic Advanced Custom Web Pages Payments Users Reports								
Find User: <input type="text"/> * Right-click on a user to change the password or to unlock a user								
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.

The screenshot shows the Uluro web interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with a profile picture and links for "My Profile" and "Sign Out". Below the header is a search bar with "Google" and a "Manage Users" section. The "Manage Users" section includes a breadcrumb "Admin Home >> Manage Users" and a search filter area. The search filter area has "Look For: Account Name", "Which: equals", a search input field, and buttons for "Search", "Reset", and "Add User". There are also pagination controls showing "1 2 3". Below the search filter is a "User Status: All" dropdown. The main content is a table of users with a "Filter Results:" input field above it. The table has columns: Account, Username, Full Name, Email Address, Phone, Type, Status, Email, and Print. The row for "userid" is highlighted with a red box.

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.

Edit Users

Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

USERNAME: required

STATUS: ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: (optional)

LAST 4 SSN: Your data will be encrypted Required

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

SELECT EMAIL TYPE: ▼

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy



User Account Management

Manage User's Profile

Maintain user's personal details and payment information



Manage User's Email

Update a user's email address or set password expiration.



Add & Remove Accounts

Use this form to add or delete accounts



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.

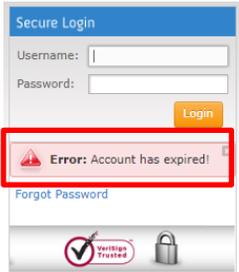
Account Locked – If this is checked, a date field will appear with the date the account was locked because of too many login attempts.

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.

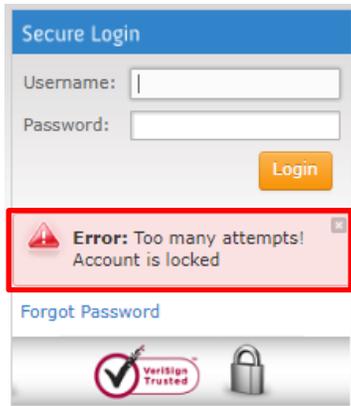
The image shows a 'Users' tab in a web setup interface. It features a search bar and a table of users. The 'Expire Date' column is highlighted with a red box. The table contains the following data:

User Type	User ID	User Name	Status	Email	Disclaimer	Accept Date	Mail	Locked	Lock Date	Reason	Expire Date	Send Email	Send Fax
AD	admin	Administrator	A	ttobin@transfrm.com	Y	07/14/2017	N	N				Y	N
AD	admin4	Admin User1	A	ttobin@transfrm.com	Y	07/11/2017	N	N				Y	N
AD	admin5	Admin User2	A	ttobin@transfrm.com	Y		N	N				Y	N
UR	alexwright	Alex Wright	A	ttobin@transfrm.com	Y	05/15/2017	Y	N				N	N
UR	billmurr	Bill Murr	A	ttobin@transfrm.com	Y	07/11/2017	N	N			07/08/2017	Y	N
UR	billmurr2	Tiff Murr	A	ttobin@transfrm.com	Y		N	N				N	Y
UR	billysecure	Billyyy Secure	A	ttobin@transfrm.com	X	07/14/2017	Y	N			07/08/2017	Y	N
UR	billysecure2	Tiff Secure	A	ttobin@transfrm.com	Y		Y	N				N	Y

The image shows the 'Edit Users' profile management page for 'Billyyy Secure - #1554'. The page includes a header with 'Admin Home >> Manage Users >> Edit Users' and a 'User Profile Management' section. The 'ACCOUNT EXPIRES' field is highlighted with a red box and contains the value '7/8/2017'. Other fields include USERNAME (billysecure), STATUS (Active), USER TYPE (UR - Standard Users), FULL NAME (Billyyy Secure), PHONE # (555) 555-5555, MOBILE PHONE # (555) 555-5555, FAX NUMBER, LAST 4 SSN (1111), PRIMARY EMAIL (ttobin@transfrm.com), ACCEPTED DISCLAIMER (7/14/2017), DELIVERY METHOD (Send Mail, Send Email, Send Fax), SELECT EMAIL TYPE (URL), ALLOW PAYMENTS, MERCHANT ACCOUNT, SUBMISSION APPROVAL, ACCOUNT LOCKED, and REASON LOCKED. Buttons for 'Save', 'Cancel', 'User Access', and 'Reset User Password' are at the bottom. An 'ENCRYPTED 128-bit SSL' logo is also present.

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, there 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.

User Type	User ID	User Name	Status	Email	Disclaimer	Accept Date	Mail	Locked	Lock Date	Reason	Expire Date	Send Email	Send Fax
AD	admin	Administrator	A	ttobin@transfrm.com	Y	07/14/2017	N	N				Y	N
AD	admin4	Admin User1	A	ttobin@transfrm.com	Y	07/11/2017	N	N				Y	N
AD	admin5	Admin User2	A	ttobin@transfrm.com	Y		N	N				Y	N
UR	alexwright	Alex Wright	A	ttobin@transfrm.com	Y	05/15/2017	Y	N				N	N
UR	billmurr	Bill Murr	A	ttobin@transfrm.com	Y	07/11/2017	N	N			07/08/2027	Y	N
UR	billmurr2	Tiff Murr	A	ttobin@transfrm.com	Y		N	N				N	Y
UR	billysecu		A	ttobin@transfrm.com	Y	07/14/2017	Y	Y	07/14/2017	Too many login attempts	07/08/2072	Y	N
UR	billysecu		A	ttobin@transfrm.com	Y		Y	N				N	Y
UR	brionna		A	ttobin@transfrm.com	Y	06/06/2017	Y	N				N	N

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.

Edit Users
Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Update User Information For: Billyyy Secure - #1554

USERNAME: required

STATUS: ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: (optional)

LAST 4 SSN: Your data will be encrypted Required

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

SELECT EMAIL TYPE: ▼

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED: M/d/yyyy

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

ENCRYPTED
128-bit SSL

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:

USER TYPE	DESCRIPTION	ADMIN
AD	Administrators	<input checked="" type="checkbox"/>
CS	Customer Service	<input type="checkbox"/>
UR	Standard Users	<input type="checkbox"/>

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 Maintenance
Admin Home >> User Type Maintenance

Add New User Account Type

Administrative section for editing user specific profile information.

USER TYPE ID: required

DESCRIPTION: required

ADMIN: Admin (except campaign manager)

LANDING PAGE: required

RESPONSIVE LANDING PAGE: required

PAGE: DISABLE PDF: Disable PDF Viewing

CHILD ADMIN: Enable Child Admin

ENCRYPTED
128-bit SSL

Add New User Account Type
Add additional user types and set page level security

View User Account Types
View the list of user account types and select one to edit

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

Admin Home

Admin Home



Manage Users

This section enables administrators to manage user accounts, accessibility, and permissions.



User Types & Security

This section enables administrators to manage user accounts, accessibility, and permissions.



Web Proofing

This section allows review of the Submissions and Documents and Approval of Submissions before additional processing.



Search Records

This section allows searching for individual user documents.



Dashboard

This section allow display of the current status of all submissions.



View & Print Reports

This section allows global reports to be viewed or downloaded.



Payment Activity

This section enables administrators to manage payments and view payment history.



Payments & Payment History

This section enables administrators to manage payments and view payment history.



Upload Files

This section enables administrators to upload files to the server.

CSR Search Page

Search Records

Search Records

Advanced Search

Look For: **Date** Which **between** From: **4/14/2017** To: **6/20/2017** **Search** **Reset** **Combine Pdf**

Show Credits Show Zero Balance

Filter Results:							
Account #	Name	Date	Balance	Amount Due	SUBDESC	Combine PDF	
737-7	Mr Devon Bode	04/14/2017	\$0.00	0.0000	TransCreditUnion	<input type="checkbox"/>	
734-4	Mr Jesus Blutowsky	04/14/2017	\$0.00	0.0000	TransCreditUnion	<input type="checkbox"/>	
730-2	Mr Maximilian Blum	04/14/2017	\$0.00	0.0000	TransCreditUnion	<input type="checkbox"/>	

User Main Page

User Main

User Main

[View Payment History](#)

Look For: **Account #** Which: **equals** **Search** **Reset** **Pay Now** **Combine Pdf**

And (Optional): **Account #** Which: **equals**

Show Credits Show Zero Balance

Filter Results:							
Account #	Name	Date	Balance	Balance Due	Pay	Pdf	
Activity Log	1010123456789 Tiffany Tobin	06/09/2017	480.65	396.65	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Tiffany Tobin	06/02/2017	480.65	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Tiffany Tobin	06/02/2017	480.65	431.65	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Tiffany Tobin	06/02/2017	480.65	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Tiffany Tobin	06/02/2017	480.65	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Ms Tiffany Tobin	05/22/2017	230.00	180.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Ms Tiffany Tobin	05/19/2017	230.00	230.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Ms Tiffany Tobin	05/19/2017	230.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Activity Log	1010123456789 Tiffany Tobin	05/18/2017	195.99	0.00	<input type="checkbox"/>	<input type="checkbox"/>	

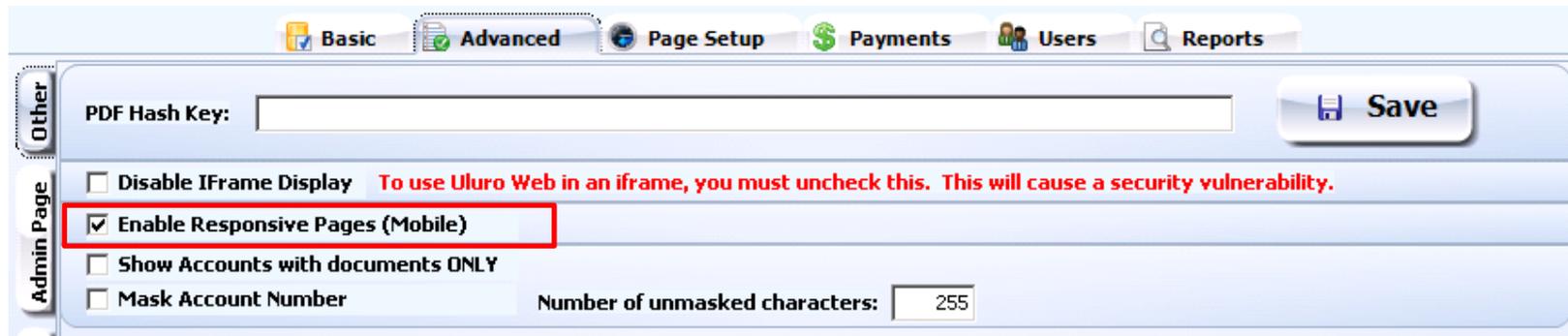
Submission Management

Submission Management

User Main >> Submission Management

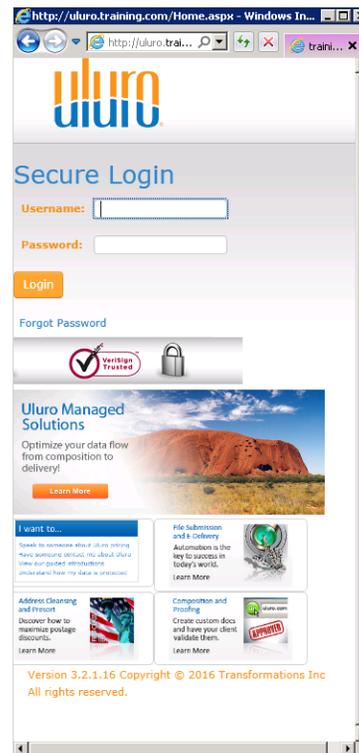
Filter Results:		
Documents	Account	Nickname
uluro bank	****142	
uluro bank	****143	
uluro bank	****150	
credits	**345	
credits	**546	
Uluro Energy	****982	Uluro Energy
Uluro Energy	***012	

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 checked



Responsive Pages unchecked



Tips from Transformations:

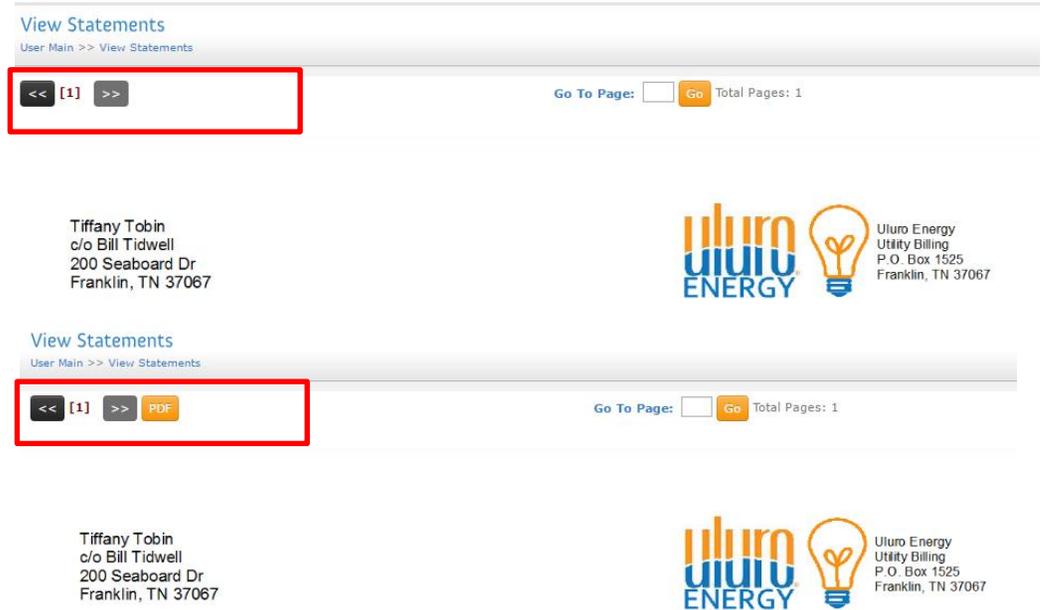
The following must be checked for the user type under Security settings to access responsive pages:

- 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.

The screenshot displays the Uluro web application interface. At the top left is the Uluro logo. At the top right, the user is identified as 'Administrator' with options for 'My Profile' and 'Sign Out'. The main content area is titled 'Edit Users' and includes a breadcrumb trail: 'Admin Home >> Manage Users >> Edit Users'. The interface is divided into two main panels. The left panel, 'User Profile Management', is for editing user-specific information. It features a yellow warning banner for 'Update User Information For: username - #1513'. Below this are form fields for USERNAME (userid), STATUS (Active), USER TYPE (UR - Standard Users), FULL NAME (username), and PHONE # ((555) 555-5555). There are also checkboxes for ALLOW TEXT MESSAGE and SEND IVR. The right panel, 'User Account Management', contains three sub-sections: 'Manage User's Profile', 'Manage User's Email', and 'Add & Remove Accounts'. The 'Add & Remove Accounts' section is highlighted with a red box and includes the instruction 'Use this form to add or delete accounts'.

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 submission 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 accounts to users, that can be done within each 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.

The screenshot shows the Uluro web application interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with a user profile icon and links for "My Profile" and "Sign Out". The main heading is "Edit Users" with a breadcrumb "Admin Home >> Manage Users >> Edit Users". The primary content area is titled "Add & Remove Accounts & Account Types" and includes a privacy notice: "Your privacy is important to us. We will not rent or sell your personal information." Below this is a table with 10 entries. The table has columns for "ACCOUNT TYPE" and "ACCOUNT NUMBER". Two rows are visible: "Uluenergy" with account number "1010123456789" and "UluoWater" with account number "80200". Red 'X' icons are next to each row. Below the table is an "Add New Account" button. The form below the button has three fields: "ACCOUNT TYPE" (dropdown menu set to "UluoWater"), "ACCOUNT #" (text input set to "80200"), and "NAME ON ACCOUNT" (text input set to "Mr Tim Adams"). There are "Save" and "Cancel" buttons at the bottom of the form. A security notice at the bottom left says "ENCRYPTED 128-bit SSL". On the right side, there is a "User Account Management" sidebar with three options: "Manage User's Profile", "Manage User's Email", and "Add & Remove Accounts".

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 aren't 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.

The screenshot shows the 'Submission Type Maintenance' interface. At the top, there are fields for Customer (Uluro Training Customer 3), CLID (130), Anything I Want, and Customer Status (ACTIVE). Below this are fields for Submission Type (water), Status (Active), ID (152), Last Modified (7/11/2017 2:34:59 PM), and buttons for Sub Type Report and Current ONLY. A navigation bar includes Basic Settings, Additional, Web (highlighted with a red box), Web Ads, Submissions, Print Configurations, and Submission Ticket. The main content area is divided into several sections: 'Display Submissions on the Web' (checked), 'Accounts/Users can view Documents' (checked), 'Enable Payments' (checked), 'Submissions Require Web Approval' (unchecked), 'eStatement Verify' (Verify User has Viewed eStatement unchecked, Number of Days for Verification 0, Additional Emails 0), 'PDF Pregeneration' (After Breakpack unchecked, When Job Status goes to 'Ready To Print' unchecked), 'Single Signon PDF' (Send Document List unchecked, FTP Site, Userid, Password), 'eDocument Settings' (Allow View Images, Allow Reconcile, Allow Download CSV, Allow View as PDF, Allow Save Nickname), 'Document Exclusions' (Don't Email, Don't Fax, Don't Display), and 'Add User Accounts' Page Options (Web 3) (Validate Account # checked, Name On Account Field set to Required).

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.

Web Setup

Customer: Uluro Training Customer 3 CLID: 130 Status: Active Save Cancel

Web URL Name: uluro.training3.com | IP Address Validation

Web Database: uluro_web30

Web Logo File*: UluroLogo.png

Web CSS File**: Default.css

Web Logout URL: _____

Add User Account to all Submissions on login

Parent Customer (for use with Parent/Child)

Web Logo Additional Settings

Desc (Shows on hover): _____

Hyperlink: _____

Open in a new page when clicked

uluro Administrator My Profile | Sign Out

Edit Users
Admin Home >> Manage Users >> Edit Users

Add & Remove Accounts & Account Types
Your privacy is important to us. We will not rent or sell your personal information.

Update Accounts For: username - #1513

Show 10 entries

ACCOUNT TYPE	ACCOUNT NUMBER
✘ UluroWater	1010123456789
✘ UluroGas	1010123456789
✘ CreditMap	1010123456789
✘ Uluenergy	1010123456789

First Previous 1 Next Last

Add New Account

ENCRYPTED
128-bit SSL

User Account Management

- Manage User's Profile: Maintain user's personal details and payment information
- Manage User's Email: Update a user's email address or set password expiration.
- Add & Remove Accounts: Use this form to add or delete accounts

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.

The screenshot shows the Uluro web application interface. At the top left is the Uluro logo. At the top right, there is a user profile section with the text "username" and "My Profile | Sign Out" next to a user icon. Below this is a navigation bar with "Profile Maintenance" and a breadcrumb "User Main >> Profile Maintenance". The main content area is divided into two columns. The left column is titled "Add & Remove Accounts & Account Types" and includes a privacy notice: "Your privacy is important to us. We will not share your personal information." Below this is a table with two columns: "ACCOUNT TYPE" and "ACCOUNT NUMBER". The table lists four accounts: UluroWater, UluroGas, CreditMap, and Uluenergy, all with the account number 1010123456789. At the bottom of this section is an "ENCRYPTED 128-bit SSL" badge. The right column is titled "Profile Management" and contains four links: "Manage My Profile" (with a person icon), "Manage Password & Email" (with a shield icon), "Manage Accounts" (with a document icon and a plus sign), and "Manage Payments" (with a credit card icon).

ACCOUNT TYPE	ACCOUNT NUMBER
UluroWater	1010123456789
UluroGas	1010123456789
CreditMap	1010123456789
Uluenergy	1010123456789

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.

The screenshot shows the 'Password Policy' configuration window. The 'Basic' tab is selected and highlighted with a red box. The 'Password' sub-tab is also selected. The 'Web Standard Password Policy' section includes options for 'Use Global', 'Require at least 1 Uppercase', 'Require at least 1 Number', 'Require at least 1 Letter', and 'Require at least 1 Special Character'. The 'Minimum Password Length' is set to 8, and 'Password Expires in Days' is set to 30. There are buttons for 'Reset User PW Expire Dates' and 'Users must change Password'. The 'Web Enhanced Password Policy' section is checked, with options for 'Enable Enhanced Password Policy', 'Use Global', 'Users can only change their password once per 24 hours', 'Lockout Users after 5 failed attempts', 'User must enter current password on password change', 'Cannot reuse a password for 0 days', and 'Send password expired email' (set to 7 days before expiration). A red note at the bottom says 'Setup the password expiration email under Advanced->PageHTML/CSS->Emails->Password Expiration'. A 'Save' button is in the top right.

The screenshot shows the 'Global Settings' window with the 'Password Settings' tab selected. The 'Web Standard Password Policy' section has 'Require at least 1 Uppercase', 'Require at least 1 Number', 'Require at least 1 Letter', and 'Require at least 1 Special Character' all unchecked. The 'Minimum Length' is set to 8. The 'Web Enhanced Password Policy' section is checked, with 'Enable Enhanced Password Policy' checked. Underneath, 'Users can only change their password once per 24 hours', 'Lockout Users after 5 failed attempts', and 'User must enter current password on password change' are all checked. 'Cannot reuse a password for 0 days' is unchecked, and 'Send password expired email' is unchecked with a value of 7 days before expiration. A red note at the bottom states: 'The default Subject and Body will be loaded into each customer when you go into the web settings for the customer.'

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.

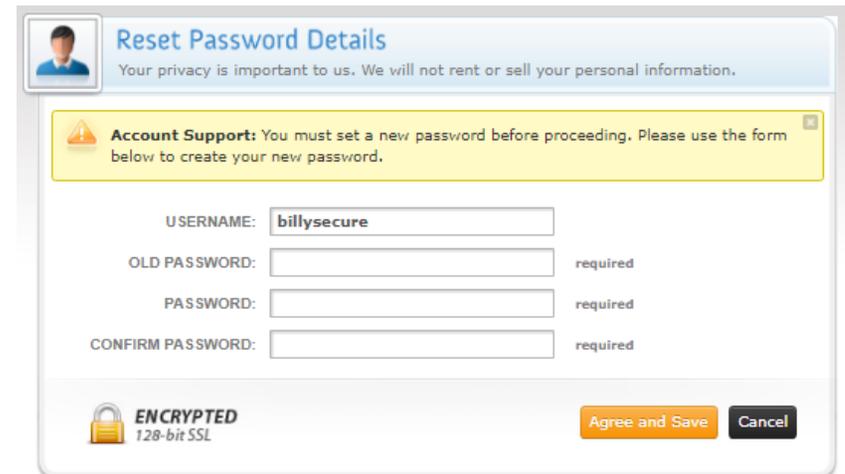
On the next login, the user will be redirected to this screen:



The screenshot shows a web form titled "Reset Password Details" with a privacy notice: "Your privacy is important to us. We will not rent or sell your personal information." A yellow warning box states: "Account Support: You must set a new password before proceeding. Please use the form below to create your new password." The form contains four input fields: "USERNAME:" with the value "tiffanytobin", "OLD PASSWORD:" with masked characters and a "required" label, "PASSWORD:" with masked characters and a "required" label, and "CONFIRM PASSWORD:" with masked characters and a "required" label. At the bottom, there is a lock icon with the text "ENCRYPTED 128-bit SSL" and two buttons: "Agree and Save" and "Cancel".

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.

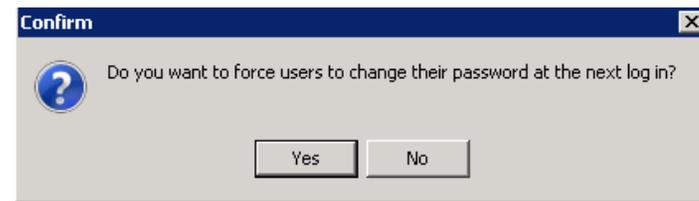
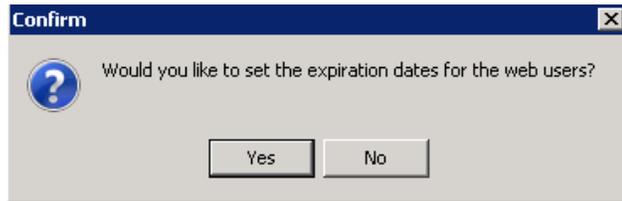
If the password has expired, the next time the user logs in, the user will be directed to reset their password:



The screenshot shows a web form titled "Reset Password Details" with a privacy notice: "Your privacy is important to us. We will not rent or sell your personal information." A yellow warning box states: "Account Support: You must set a new password before proceeding. Please use the form below to create your new password." The form contains four input fields: "USERNAME:" with the value "billysecure", "OLD PASSWORD:" with masked characters and a "required" label, "PASSWORD:" with masked characters and a "required" label, and "CONFIRM PASSWORD:" with masked characters and a "required" label. At the bottom, there is a lock icon with the text "ENCRYPTED 128-bit SSL" and two buttons: "Agree and Save" and "Cancel".

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 change their password.

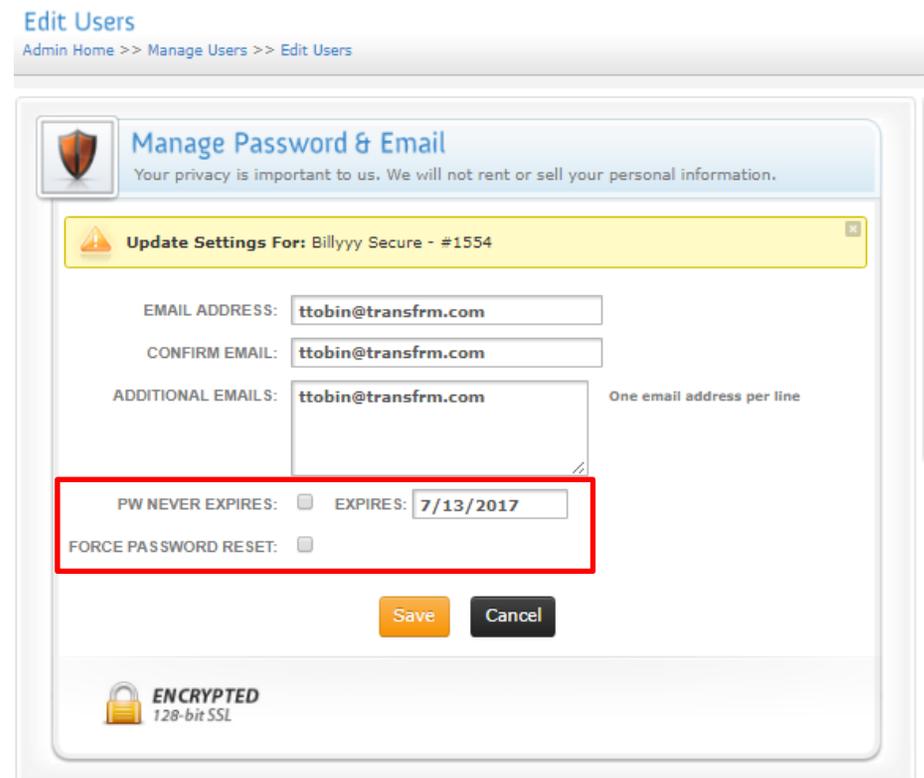
If never expire was checked and is then unchecked, before you save you will be asked 2 questions:



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.

Account Recovery
Your privacy is important to us. We will not rent or sell your personal information.

Please check the errors below and resubmit

MOBILE NUMBER: 555555555 Required

ACCOUNT NUMBER AS IT APPEARS ON YOUR STATEMENT: 1010123456789 Required

ACCOUNT NAME AS IT APPEARS ON YOUR STATEMENT: Tiffany Tobin Required

PASSWORD: [Empty] Required
MINIMUM LENGTH IS 8.

CONFIRM PASSWORD: [Empty] Required

RECOVERY EMAIL: ttobin@transfrm.com Required

FULL NAME: End_user_1 Required

Security Questions

QUESTION 1: What is your favorite football team? Required

ANSWER 1: [Empty] Required

QUESTION 2: What is the meaning of life? Required

ANSWER 2: [Empty] Required

Email Key SMS Key Cancel

ENCRYPTED 128-bit SSL

Profile Maintenance
User Main >> Profile Maintenance

Manage Password & Email
Your privacy is important to us. We will not share your personal information.

Update Error: Password can only be changed once every 24 hours, please try again!

CURRENT PASSWORD: [Empty] minimum 6 characters

NEW PASSWORD: [Empty] minimum 8 characters

CONFIRM PASSWORD: [Empty]

EMAIL ADDRESS: ttobin@transfrm.com

CONFIRM EMAIL: ttobin@transfrm.com

ADDITIONAL EMAILS: ttobin@transfrm.com One email address per line

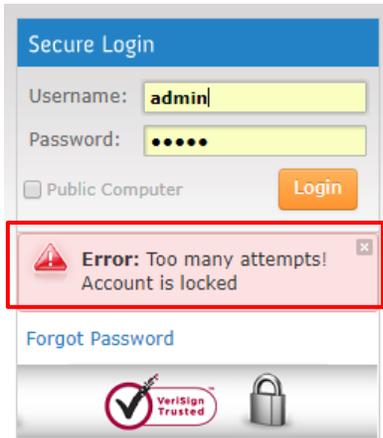
Save Cancel

ENCRYPTED 128-bit SSL

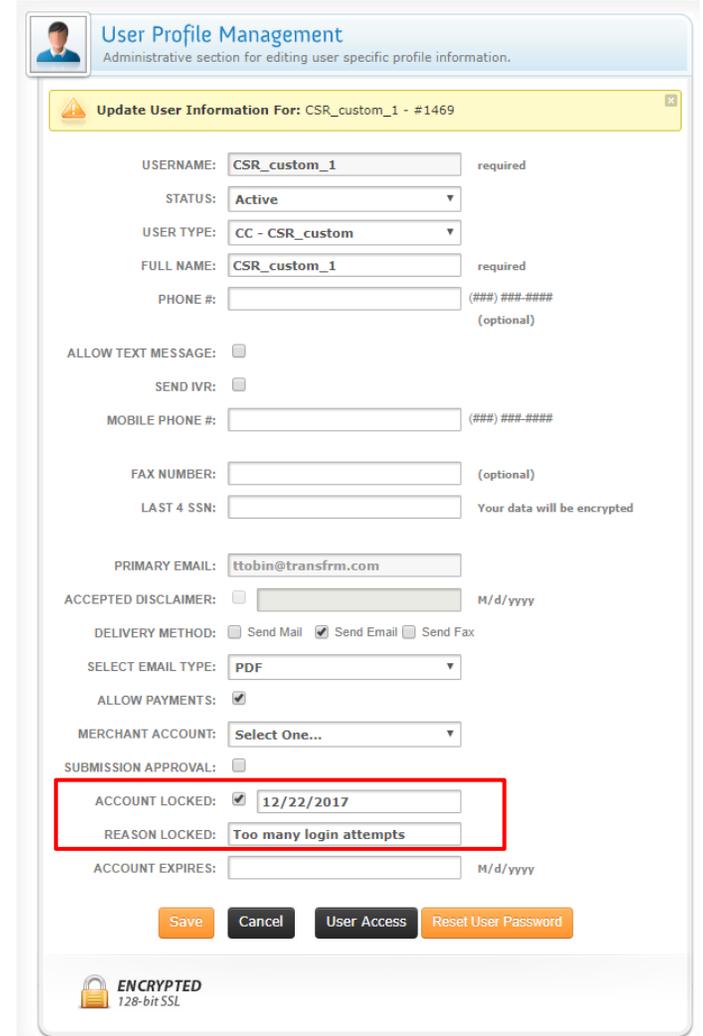
Profile Management

- Manage My Profile: Maintain your personal details and payment information
- Manage Password & Email: Change your password and update your email address
- Manage Accounts: Use this form to add or delete accounts
- Manage Recovery: Use this form to add or modify your registration option
- Manage Payments: Manage payment methods, recurring payments and view payment history

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.



The image shows a 'Secure Login' form. The 'Username' field contains 'admin' and the 'Password' field is masked with dots. Below the fields is a 'Public Computer' checkbox and a 'Login' button. A red-bordered error message box is overlaid on the form, stating: 'Error: Too many attempts! Account is locked'. Below the error message is a 'Forgot Password' link and a VeriSign Trusted logo.



The image shows the 'User Profile Management' administrative section for editing user specific profile information. The user being edited is 'CSR_custom_1 - #1469'. The form includes fields for USERNAME, STATUS, USER TYPE, FULL NAME, PHONE #, MOBILE PHONE #, FAX NUMBER, LAST 4 SSN, PRIMARY EMAIL, ACCEPTED DISCLAIMER, DELIVERY METHOD, SELECT EMAIL TYPE, ALLOW PAYMENTS, MERCHANT ACCOUNT, SUBMISSION APPROVAL, ACCOUNT LOCKED, REASON LOCKED, and ACCOUNT EXPIRES. The 'ACCOUNT LOCKED' checkbox is checked and the date is '12/22/2017'. The 'REASON LOCKED' field is 'Too many login attempts'. The form also includes buttons for 'Save', 'Cancel', 'User Access', and 'Reset User Password'. A VeriSign Trusted logo is visible at the bottom.

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.

The screenshot shows the 'Manage Password & Email' form. The 'CURRENT PASSWORD' field is highlighted with a red box. The form includes fields for 'NEW PASSWORD', 'CONFIRM PASSWORD', 'EMAIL ADDRESS', 'CONFIRM EMAIL', and 'ADDITIONAL EMAILS'. The 'EMAIL ADDRESS' and 'CONFIRM EMAIL' fields contain the value 'ttobin@transfrm.com'. The 'ADDITIONAL EMAILS' field also contains 'ttobin@transfrm.com'. The form has 'Save' and 'Cancel' buttons and an 'ENCRYPTED 128-bit SSL' indicator.

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.

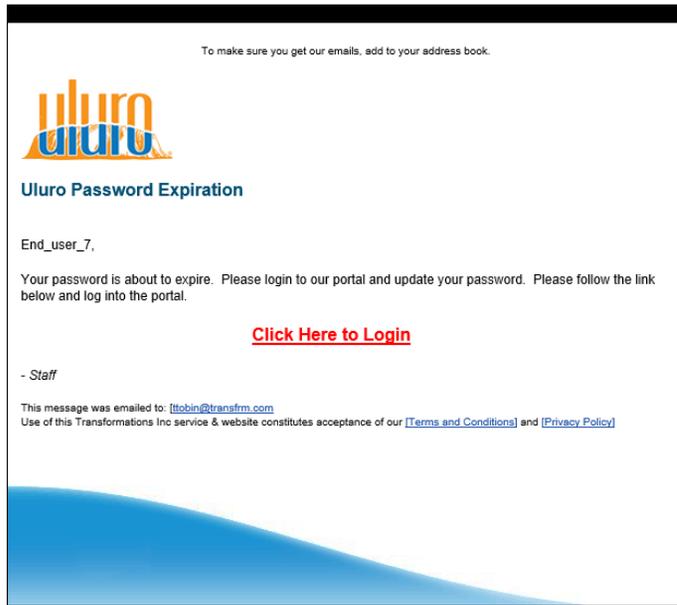
The screenshot shows the 'Manage Password & Email' form with an error message highlighted in a red box. The error message reads: 'Update Error: A password cannot be reused for 1 days, please try again!'. The form fields and buttons are visible below the error message.

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

The screenshot shows the 'Manage Password & Email' form with an error message highlighted in a red box. The error message reads: 'Update Error: New password cannot be the same as current password! please try again!'. The form fields and buttons are visible below the error message.

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.

Mon 1/22/2018 12:00 AM
 T Transformations <no-reply@ulurosupport.com>
 Your password to our portal is about to expire
 To ttobin@transfm.com



Reset User Password

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

Are you sure you would like to reset the users password?

[Reset User Password](#) [Cancel](#)

Click Reset User Password.

Edit Users

Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Email Sent: We have sent an email with instructions for retrieving your password to ttobin@transfrm.com.

USERNAME:

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.

Edit Users

Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Update User Information For: username - #1527

USERNAME: required

STATUS: ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: (optional)

LAST 4 SSN: Your data will be encrypted

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

SELECT EMAIL TYPE: ▼

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

[Save](#) [Cancel](#) [User Access](#) [Reset User Password](#)

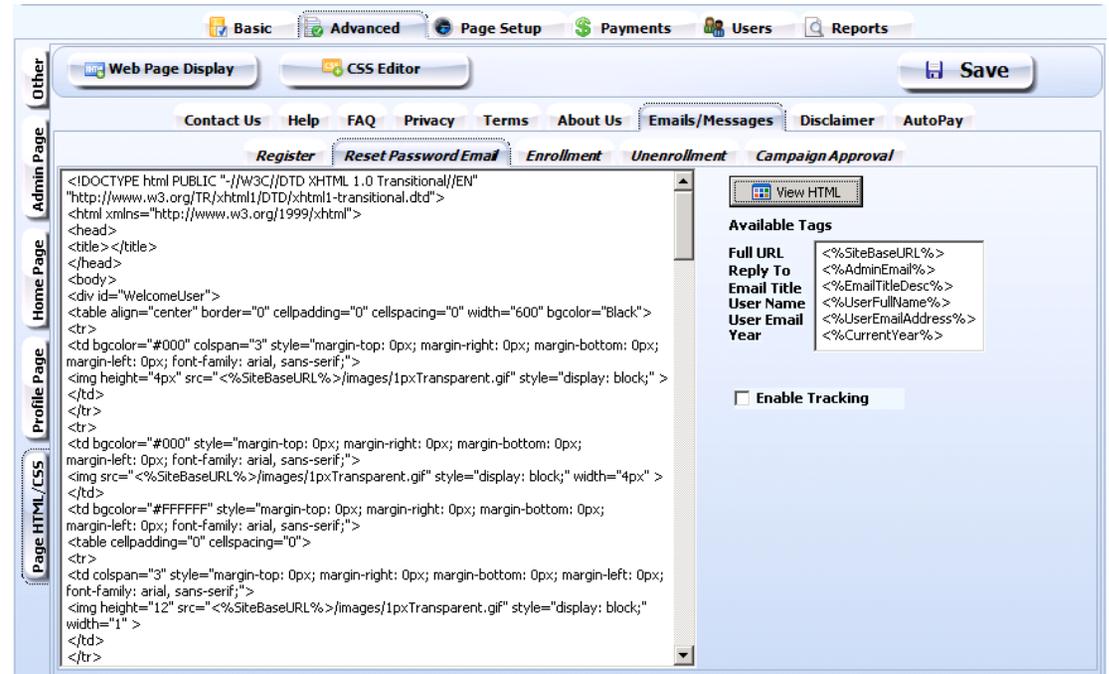
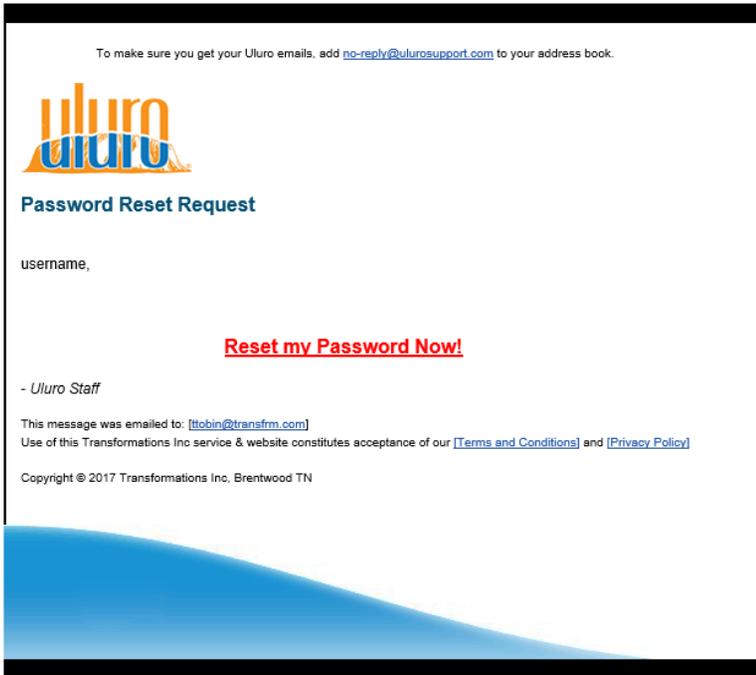
ENCRIPTED
128-bit SSL

User Account Management

Manage User's Profile
Maintain user's personal details and payment information

Manage User's Email
Update a user's email address or set password expiration.

Add & Remove Accounts
Use this form to add or delete accounts



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.

Reset Password Details

Your privacy is important to us. We will not rent or sell your personal information.

ACCOUNT #: (as it appears on your statement)

USERNAME:

PASSWORD: required

CONFIRM PASSWORD: required

ENCRYPTED 128-bit SSL

Agree and Save Cancel

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.

The screenshot shows the Uluro website's 'Profile Maintenance' page. The top navigation bar includes the Uluro logo, a user profile icon, and links for 'My Profile' and 'Sign Out'. The main content area is titled 'Profile Maintenance' and contains a sub-section 'Manage Password & Email'. This section includes a warning about privacy, a form with fields for 'NEW PASSWORD' (with a 'minimum 8 characters' note), 'CONFIRM PASSWORD', 'EMAIL ADDRESS' (pre-filled with 'ttobin@transfm.com'), 'CONFIRM EMAIL', and 'ADDITIONAL EMAILS' (with a note 'One email address per line'). There are 'Save' and 'Cancel' buttons at the bottom of the form. A security notice at the bottom left of the form area states 'ENCRYPTED 128-bit SSL'. To the right of the main form is a 'Profile Management' sidebar with links for 'Manage My Profile', 'Manage Password & Email', 'Manage Accounts', and 'Manage Payments'.

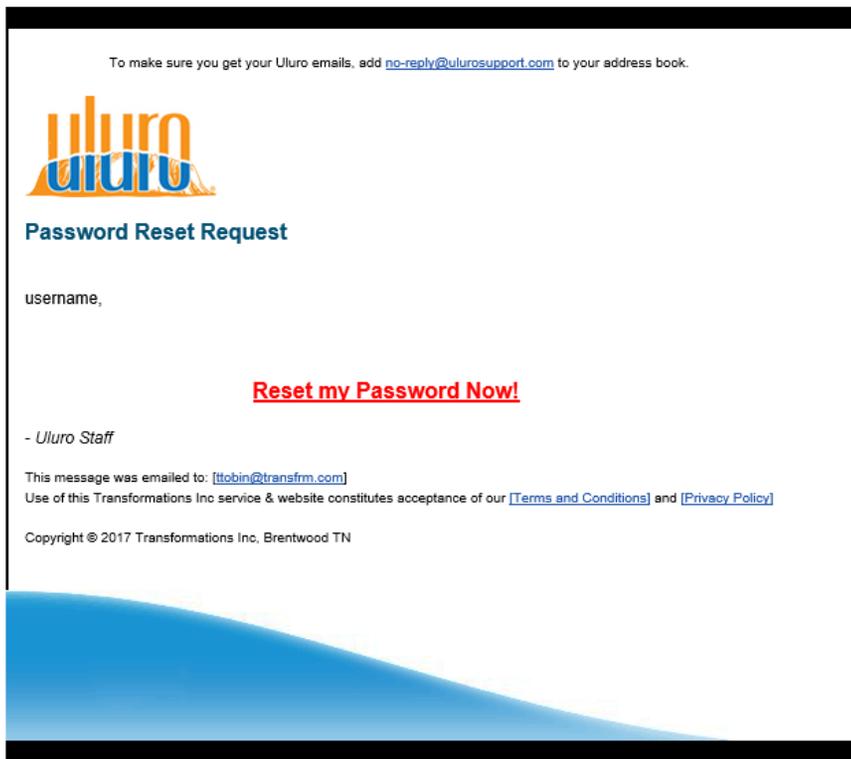
Forgot Password

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 resetting PW...you will get an email to reset your PW – you will need your account number and username to do so

The screenshot shows the 'Retrieve Your Password' page. It features a header with a user profile icon and the title 'Retrieve Your Password'. Below the title is a message: 'You will be sent a link to reset your password at the email address we have on file.' The form contains three required fields: 'ACCOUNT NUMBER', 'EMAIL ADDRESS', and 'USERNAME'. At the bottom of the form are 'Send Request' and 'Cancel' buttons. A security notice at the bottom left of the form area states 'ENCRYPTED 128-bit SSL'.



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.

The image shows a screenshot of a web form titled "Reset Password Details". At the top left, there is a small profile picture of a man. To the right of the picture is the title "Reset Password Details" and a privacy notice: "Your privacy is important to us. We will not rent or sell your personal information." Below this, there are four input fields: "ACCOUNT #:" with a note "(as it appears on your statement)", "USERNAME:", "PASSWORD:" with a "required" label, and "CONFIRM PASSWORD:" with a "required" label. At the bottom left, there is a padlock icon and the text "ENCRYPTED 128-bit SSL". At the bottom right, there are two buttons: "Agree and Save" (orange) and "Cancel" (black).

Self-Registration

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

The screenshot shows the Uluro website home page. At the top left is the Uluro logo. To its right is a navigation menu with links for Home, Frequently Asked Questions, Help, Contact Us, and Register. The Register link is highlighted with a red rectangular box. Below the navigation menu is a 'Secure Login' section with input fields for Username and Password, a Login button, and a 'Forgot Password' link. To the right of the login section is a large banner for 'Uluro Managed Solutions' featuring a landscape with a large red rock formation. The banner text reads 'Optimize your data flow from composition to delivery!' and includes a 'Learn More' button. Below the banner are three promotional boxes: 'I want to...' with links for pricing, contact, and data protection; 'File Submission and E-Delivery' with a 'Learn More' link; 'Address Cleansing and Presort' with a 'Learn More' link; and 'Composition and Proofing' with a 'Learn More' link. At the bottom of the page is a footer with links for Home, About Us, Privacy & Security, and Terms & Conditions, along with the text 'Version 3.2.1.16 Copyright © 2016 Transformations Inc All rights reserved.'

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 until



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 specific to the way the name is displayed on the statement.*

Email Address – This will be the email address the registration 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:

Thanks for Registering!

We have sent an email with instructions to the email address you provided on the registration form.

[Home](#)



New User Registration Details

Your privacy is important to us. We will not rent or sell your personal information.

Please wait for us to process your request after clicking the save button.

FULL NAME: (as it appears on your statement)

ACCOUNT NUMBER: (as it appears on your statement)

EMAIL ADDRESS: (required)

USER NAME: (required) Maximum 20 characters

DISPLAY NAME: (required) Maximum 20 characters

[Save](#) [Cancel](#)

 **ENCRYPTED**
128-bit SSL

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 account 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@transfm.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.

Confirm Registration Details
Your privacy is important to us. We will not rent or sell your personal information.

ACCOUNT #: 1010123456789
EMAIL ADDRESS: ttobin@transfrm.com required
RE-ENTER: required

Login Information

USER: username
USER NAME: display name
PASSWORD: required
PASSWORD RE-ENTER: required

I AGREE With the disclaimer (click to view)

Agree and Save

ENCRYPTED
128-bit SSL

Confirm Registration Details
Your privacy is important to us. We will not rent or sell your personal information.

: Session has expired. Please register again..

ACCOUNT #:
EMAIL ADDRESS: required
RE-ENTER: required

Login Information

USER:
USER NAME:
PASSWORD: required
PASSWORD RE-ENTER: required

I AGREE With the disclaimer (click to view)

Agree and Save

ENCRYPTED
128-bit SSL

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 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 not active yet; they have not completed the registration process.

Edit Users
Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Update User Information For: Tiffany Tobin - #1532

USERNAME: required

STATUS: **New** ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: (optional)

LAST 4 SSN: Your data will be encrypted

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

ENCRIPTED
128-bit SSL

User Account Management

- Manage User's Profile**
Maintain user's personal details and payment information
- Manage User's Email**
Update a user's email address or set password expiration.
- Add & Remove Accounts**
Use this form to add or delete accounts

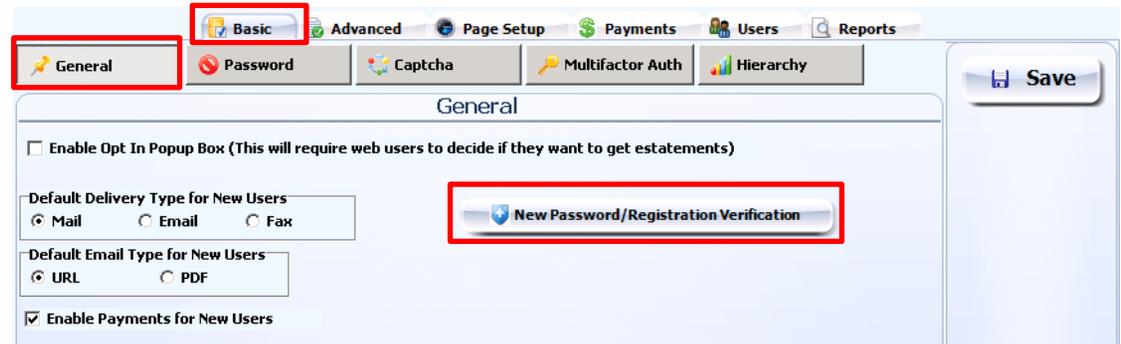
a

Registration Verification / PasswordVerification

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 change any of the requirements for a new user to self-register, click the New Password/Registration Verification button.

A screenshot of a 'New User Registration Details' form. The form has a header with a user profile icon and the text 'New User Registration Details' and 'Your privacy is important to us. We will not rent or sell your personal information.' Below the header, there is a message: 'Please wait for us to process your request after clicking the save button.' The form contains five input fields: 'FULL NAME:' (with a note '(as it appears on your statement)'), 'ACCOUNT NUMBER:' (with a note '(as it appears on your statement)'), 'EMAIL ADDRESS:' (with a note '(required)'), 'USER NAME:' (with a note '(required) Maximum 20 characters'), and 'DISPLAY NAME:' (with a note '(required) Maximum 20 characters'). At the bottom of the form, there are 'Save' and 'Cancel' buttons. A security icon and the text 'ENCRYPTED 128-bit SSL' are located at the bottom left of the form.

Password Recovery

By default the forgot password link takes you to this page. This can only be used for standard users since 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.

A screenshot of a 'Retrieve Your Password' form. The form has a header with a user profile icon and the text 'Retrieve Your Password' and 'You will be sent a link to reset your password at the email address we have on file.' Below the header, there are three input fields: 'ACCOUNT NUMBER:' (with a note 'required'), 'EMAIL ADDRESS:' (with a note 'required'), and 'USERNAME:' (with a note 'required'). At the bottom of the form, there are 'Send Request' and 'Cancel' buttons. A security icon and the text 'ENCRYPTED 128-bit SSL' are located at the bottom left of the form.

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

The screenshot shows the configuration interface for registration and password recovery. The main table is as follows:

	Required for User Registration	Required for User PW Recovery	Required for Admins PW Recovery	Text To Display on Web	Order
Text Message Key	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Email Key	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
User ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Recovery Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
User Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Recovery Mobile Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Additional settings on the right side of the table:

- Enable for Registration
- Enable for Password Recovery

Below the table, there are three sections for adding fields:

- Security Questions:** 0 questions.
- Document Table Fields:** 0 fields. Note: Not used for Admin PW Recovery.
- Custom Fields:** 0 fields.

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

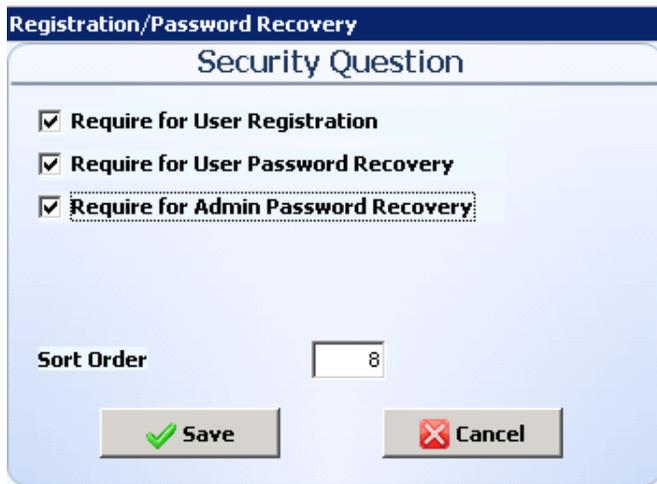
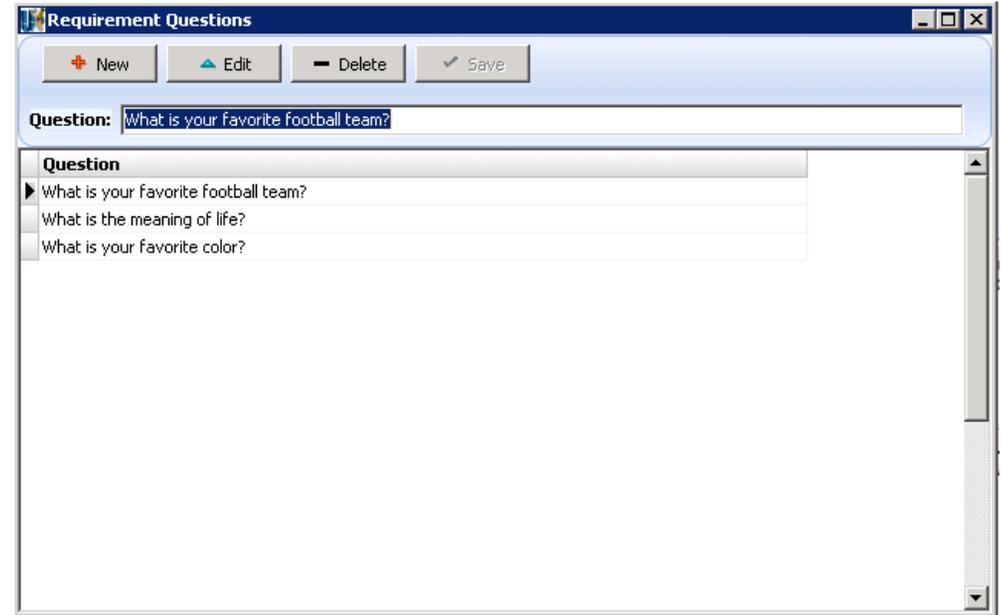
Click the Questions button to create the questions that will be asked of users during registration or password recovery.

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 registration 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.

Registration/Password Recovery

Document Field

Require for User Registration

Require for User Password Recovery

Document Field Account

Text to Display on Web Account Number

Additional Message As it appears on your statement

Sort Order 1

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.



The screenshot shows a dialog box titled "Registration/Password Recovery" with a sub-header "Custom Field". It contains three checkboxes: "Require for User Registration" (checked), "Require for User Password Recovery" (unchecked), and "Require for Admin Password Recovery" (unchecked). Below these are three input fields: "Text to Display on Web" with the value "Last 4 Digits of SSN", "Additional Message" (empty), and "Sort Order" with the value "6". At the bottom are "Save" and "Cancel" buttons.



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:

Registration/Reset Password Verification

Registration/Password Recovery Requirements | Password Recovery Key | Registration Key | Registration Error

Save | Cancel

Enable for Registration
 Enable for Password Recovery

	Required for User Registration	Required for User PW Recovery	Required for Admins PW Recovery	Text To Display on Web	Order
Text Message Key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Email Key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
User ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	user ID	2
Recovery Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Recovery Email	4
Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Password	3
User Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Full Name	5
Recovery Mobile Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mobile Number	0

+ New | Edit | Delete | Security Questions 3 | Questions

Register	PW Rec.	Admin	Order
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8

+ New | Edit | Delete | Document Table Fields 2 | Not used for Admin PW Recovery

Doc Field	Text To Display on Web	Additional Display Text	Register	PW Rec.	Order
Account	Account Number	As it appears on your statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
AccName	Account Name	As it appears on your statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2

+ New | Edit | Delete | Custom Fields 1

Text To Display on Web	Additional Display Text	Register	PW Rec.	Admin	Order
Last 4 Digits of SSN		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6

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.



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 specific to the way the name is displayed on the statement.*

New User Registration
Your privacy is important to us. We will not rent or sell your personal information.

MOBILE NUMBER Required

ACCOUNT NUMBER Required
AS IT APPEARS ON YOUR STATEMENT

ACCOUNT NAME Required
AS IT APPEARS ON YOUR STATEMENT

USER ID Required

PASSWORD Required
MINIMUM LENGTH IS 8.

CONFIRM PASSWORD Required

RECOVERY EMAIL Required

CONFIRM EMAIL Required

FULL NAME Required

LAST 4 DIGITS OF SSN Required

Security Questions

QUESTION 1 Required

ANSWER 1 Required

Email Key | SMS Key | Cancel

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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:

Profile Maintenance
User Main >> Profile Maintenance

My Profile
Your privacy is important to us. We will not share your personal information.

FULL NAME: required

ADDRESS 1: Required

ADDRESS 2: Optional

CITY: Required

STATE: Required

POSTAL CODE: Required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

ALLOW VOICE CALLS:

MOBILE PHONE #: (###) ###-#### Required

LAST 4 SSN: Your data will be encrypted Required

PRIMARY EMAIL:

MAKE PAYMENTS:

DELIVERY METHOD: Send Mail Send Email

UN-ENROLL:

Profile Management

- Manage My Profile: Maintain your personal details and payment information
- Manage Password & Email: Change your password and update your email address
- Manage Accounts: Use this form to add or delete accounts
- Manage Recovery**: Use this form to add or modify your registration option
- Manage Payments: Manage payment methods, recurring payments and view payment history

Update Recovery Requirements

MOBILE NUMBER New Field

RECOVERY EMAIL New Field

CONFIRM EMAIL New Field

FULL NAME New Field

Security Questions

QUESTION 1 ▼

ANSWER 1 New Field

QUESTION 2 ▼

ANSWER 2 New Field

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

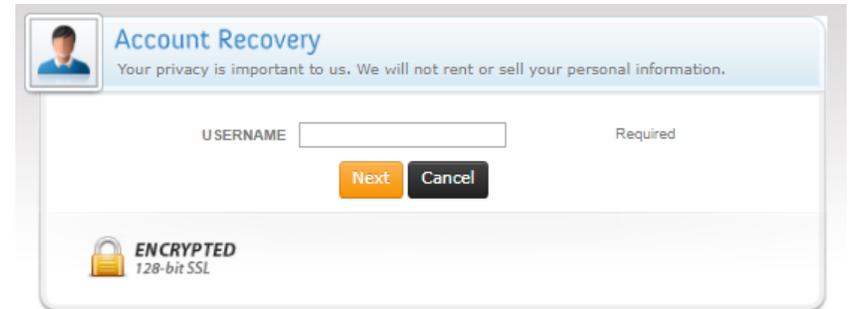
Update Recovery Requirements

MOBILE NUMBER	<input type="text" value="555555555"/>	New Field
RECOVERY EMAIL	<input type="text" value="ttobin@transfrm.com"/>	New Field
CONFIRM EMAIL	<input type="text" value="ttobin@transfrm.com"/>	New Field
FULL NAME	<input type="text" value="Tiffany Tobin"/>	New Field

Security Questions

QUESTION 1	<input type="text" value="What is your favorite football team?"/>	
ANSWER 1	<input type="text" value="....."/>	New Field
QUESTION 2	<input type="text" value="What is the meaning of life?"/>	
ANSWER 2	<input type="text" value=".. "/>	New Field

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



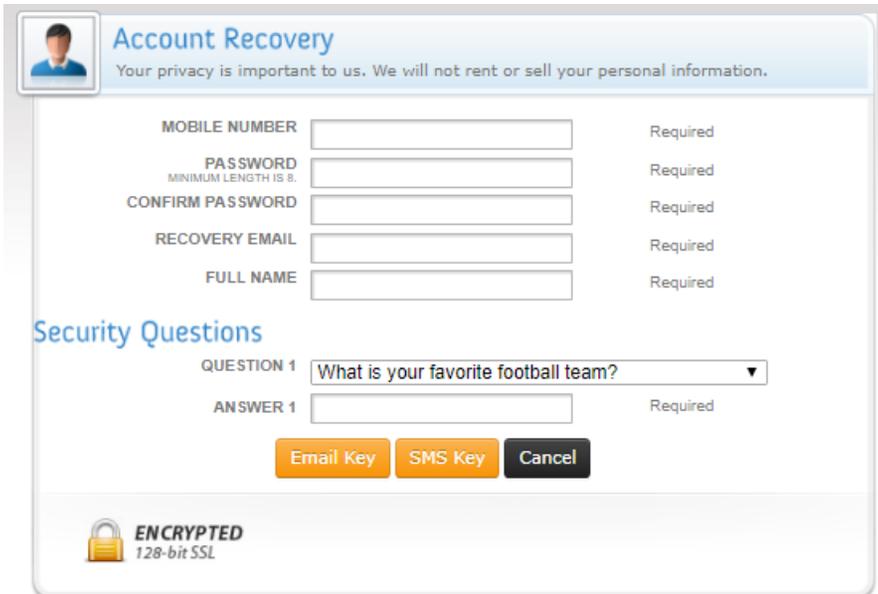
The screenshot shows the 'Account Recovery' page for admin users. At the top left is a user profile icon. The title 'Account Recovery' is in blue, with a privacy notice below it: 'Your privacy is important to us. We will not rent or sell your personal information.' The main form has a 'USERNAME' label and a text input field, with 'Required' text to the right. Below the input field are two buttons: 'Next' (orange) and 'Cancel' (black). At the bottom left, there is a lock icon and the text 'ENCRYPTED 128-bit SSL'.

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 a 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.



The screenshot shows the 'Account Recovery' page for standard users. It features a user profile icon, the title 'Account Recovery', and a privacy notice. The form includes several required fields: 'MOBILE NUMBER', 'PASSWORD' (with a note 'MINIMUM LENGTH IS 8'), 'CONFIRM PASSWORD', 'RECOVERY EMAIL', and 'FULL NAME'. Below these is a 'Security Questions' section with 'QUESTION 1' set to 'What is your favorite football team?' and an 'ANSWER 1' field. At the bottom, there are three buttons: 'Email Key' (orange), 'SMS Key' (orange), and 'Cancel' (black). A lock icon and 'ENCRYPTED 128-bit SSL' text are at the bottom left.

Account Recovery
Your privacy is important to us. We will not rent or sell your personal information.

MOBILE NUMBER Required

PASSWORD Required
MINIMUM LENGTH IS 8.

CONFIRM PASSWORD Required

RECOVERY EMAIL Required

FULL NAME Required

Security Questions

QUESTION 1 Required

ANSWER 1 Required

QUESTION 2 Required

ANSWER 2 Required

Text Message Keys / Email Keys

Users will 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.

Registration/Reset Password Verification

Registration/Password Recovery Requirements | Password Recovery Key | Registration Key | Registration Error

	Required for User Registration	Required for User PW Recovery	Required for Admins PW Recovery		
<input checked="" type="checkbox"/>	Enable for Registration				
<input checked="" type="checkbox"/>	Enable for Password Recovery				
Text Message Key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text To Display on Web	
Email Key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Order
User ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	User ID	2
Recovery Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Recovery Email	4
Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Password	3
User Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Full Name	5
Recovery Mobile Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mobile Number	0

New User Registration

Your privacy is important to us. We will not rent or sell your personal information.

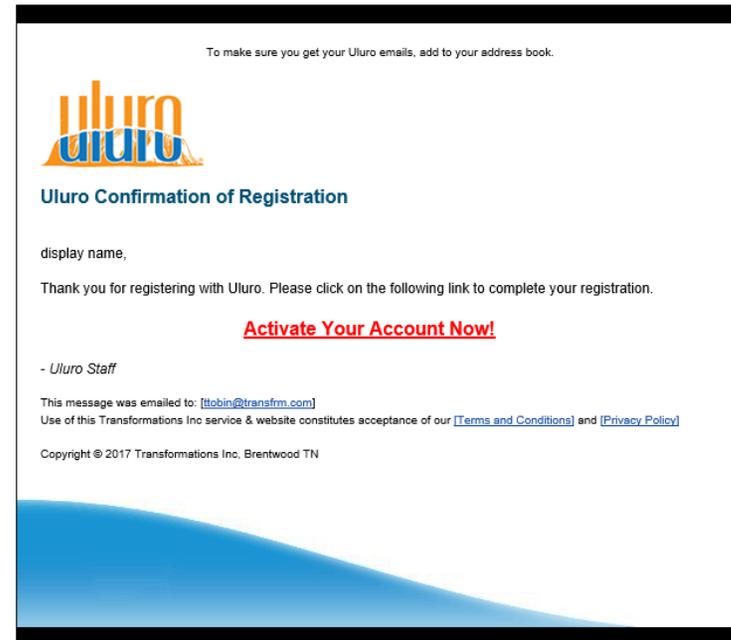
MOBILE NUMBER	<input type="text"/>	Required
ACCOUNT NUMBER <small>AS IT APPEARS ON YOUR STATEMENT</small>	<input type="text"/>	Required
ACCOUNT NAME <small>AS IT APPEARS ON YOUR STATEMENT</small>	<input type="text"/>	Required
USER ID	<input type="text"/>	Required
PASSWORD <small>MINIMUM LENGTH IS 8</small>	<input type="text"/>	Required
CONFIRM PASSWORD	<input type="text"/>	Required
RECOVERY EMAIL	<input type="text"/>	Required
CONFIRM EMAIL	<input type="text"/>	Required
FULL NAME	<input type="text"/>	Required
LAST 4 DIGITS OF SSN	<input type="text"/>	Required

Security Questions

QUESTION 1

ANSWER 1 Required

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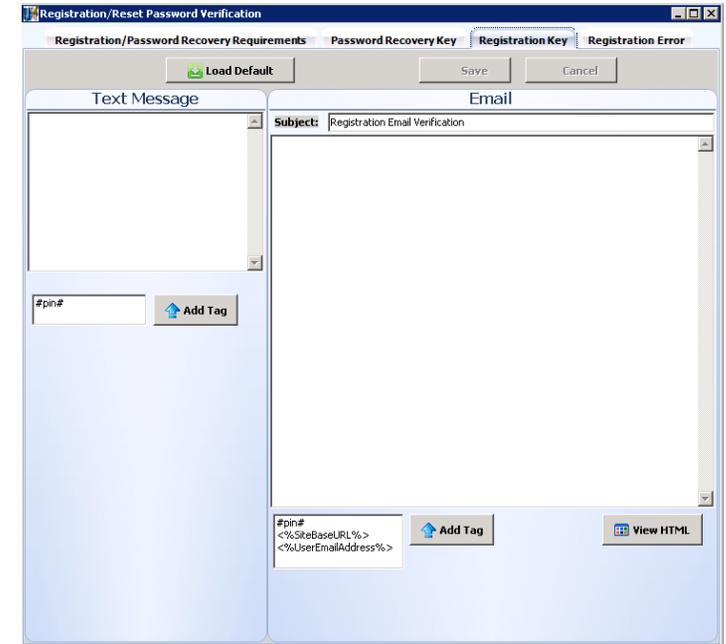
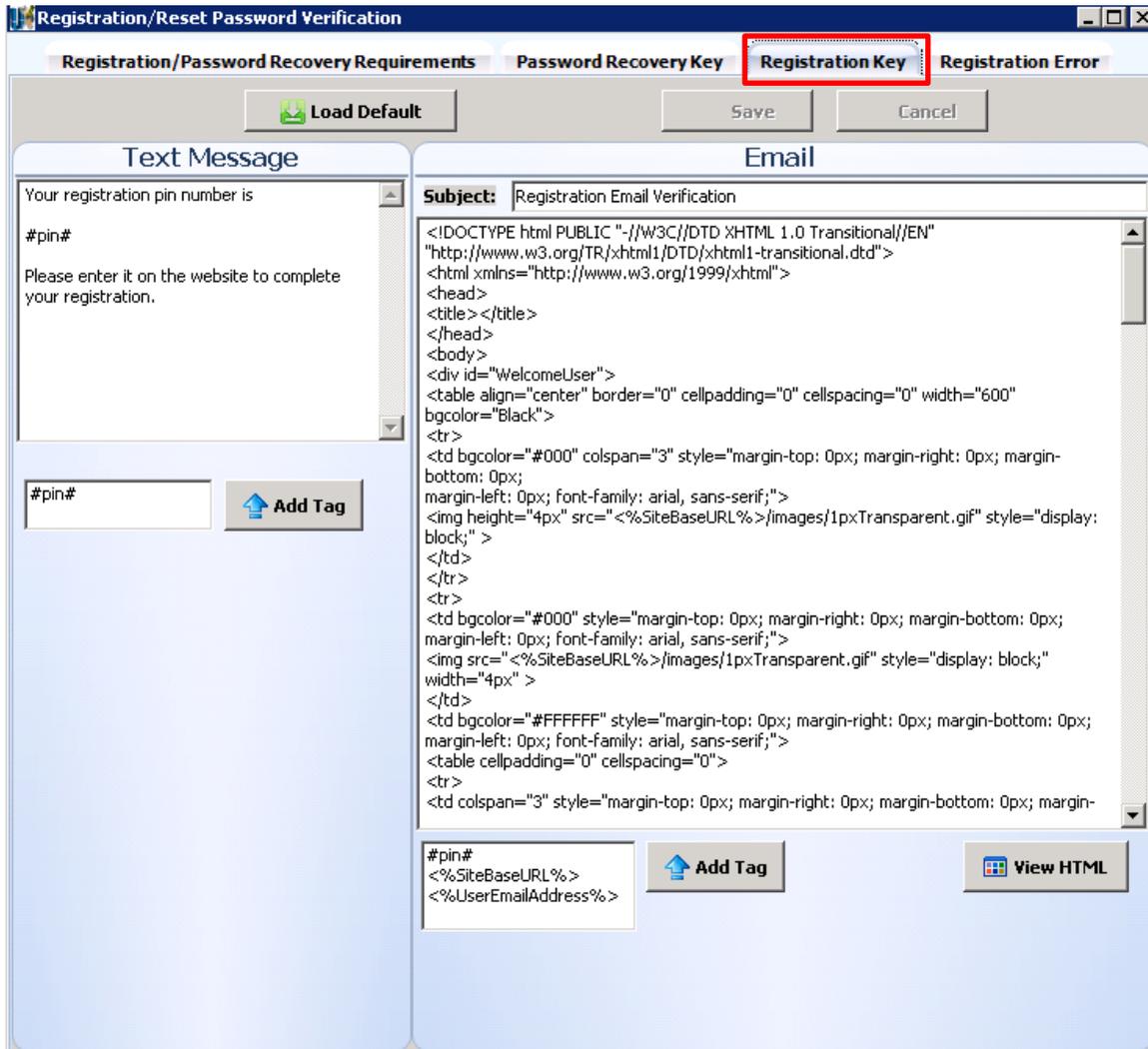


Tips from Transformations:

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

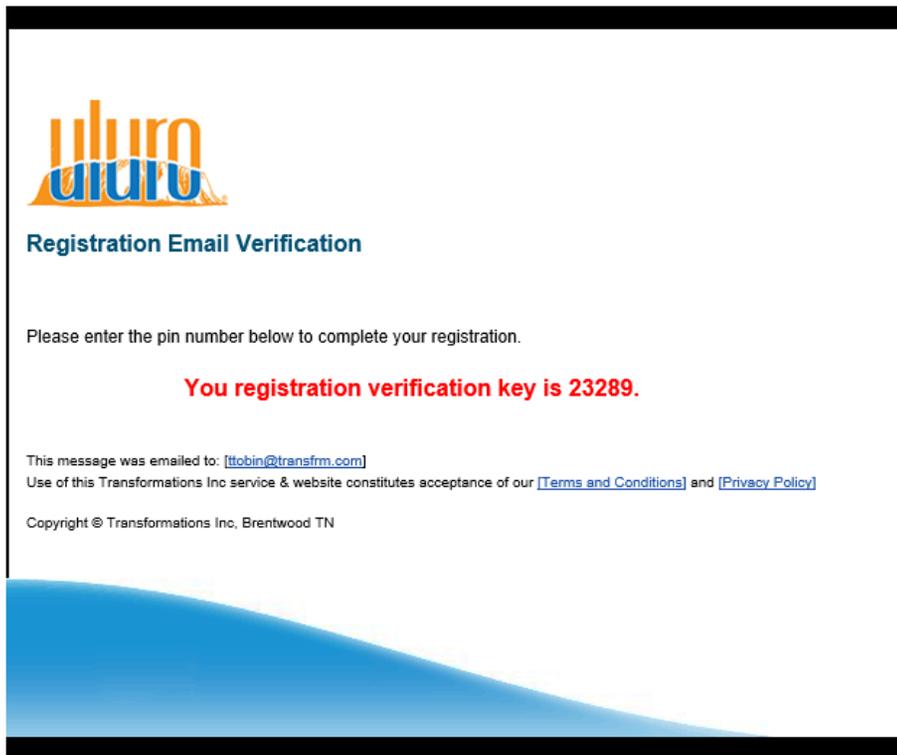
If the keys are enabled, the Email/Text Message must be setup.

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.



The image shows a "New User Registration" form. At the top left is a small profile picture icon. The title "New User Registration" is in blue, with a sub-header "Your privacy is important to us. We will not rent or sell your personal information." Below this is a list of required fields, each with a text input box and a "Required" label to its right:

- MOBILE NUMBER
- ACCOUNT NUMBER (AS IT APPEARS ON YOUR STATEMENT)
- ACCOUNT NAME (AS IT APPEARS ON YOUR STATEMENT)
- USER ID
- PASSWORD (MINIMUM LENGTH IS 8)
- CONFIRM PASSWORD
- RECOVERY EMAIL
- CONFIRM EMAIL
- FULL NAME
- LAST 4 DIGITS OF SSN

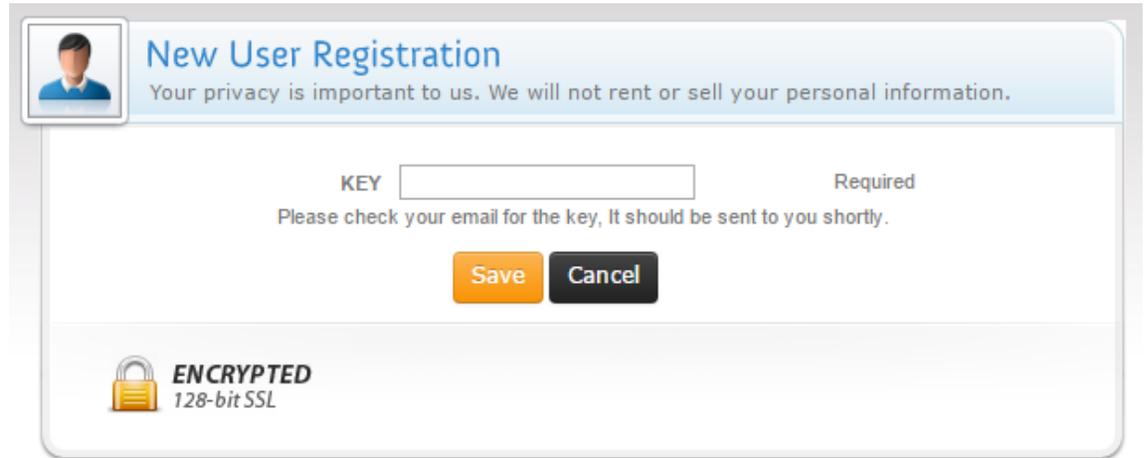
Below the registration fields is a "Security Questions" section. It includes "QUESTION 1" with a dropdown menu containing "What is your favorite football team?" and "ANSWER 1" with a text input box. At the bottom of the form are three buttons: "Email Key" (orange), "SMS Key" (orange), and "Cancel" (black). At the very bottom, there is a lock icon and the text "ENCRYPTED 128-bit SSL".



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:

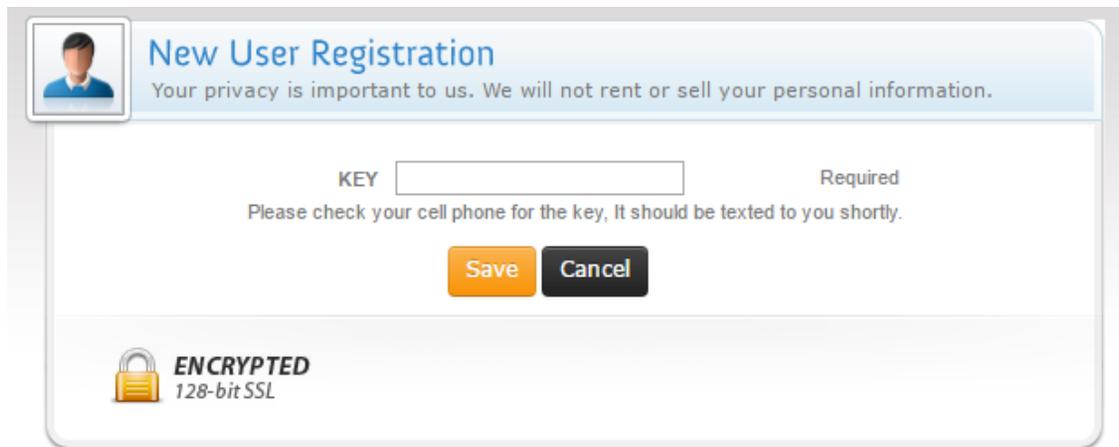


New User Registration
Your privacy is important to us. We will not rent or sell your personal information.

KEY Required
Please check your email for the key, it should be sent to you shortly.

[Save](#) [Cancel](#)

 **ENCRYPTED**
128-bit SSL



New User Registration
Your privacy is important to us. We will not rent or sell your personal information.

KEY Required
Please check your cell phone for the key, it should be texted to you shortly.

[Save](#) [Cancel](#)

 **ENCRYPTED**
128-bit SSL

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

Thanks for Registering!

You may log in using the username you provided on the registration form.

[Home](#)

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.

Account Recovery
Your privacy is important to us. We will not rent or sell your personal information.

MOBILE NUMBER Required

PASSWORD Required
MINIMUM LENGTH IS 8.

CONFIRM PASSWORD Required

RECOVERY EMAIL Required

FULL NAME Required

Security Questions

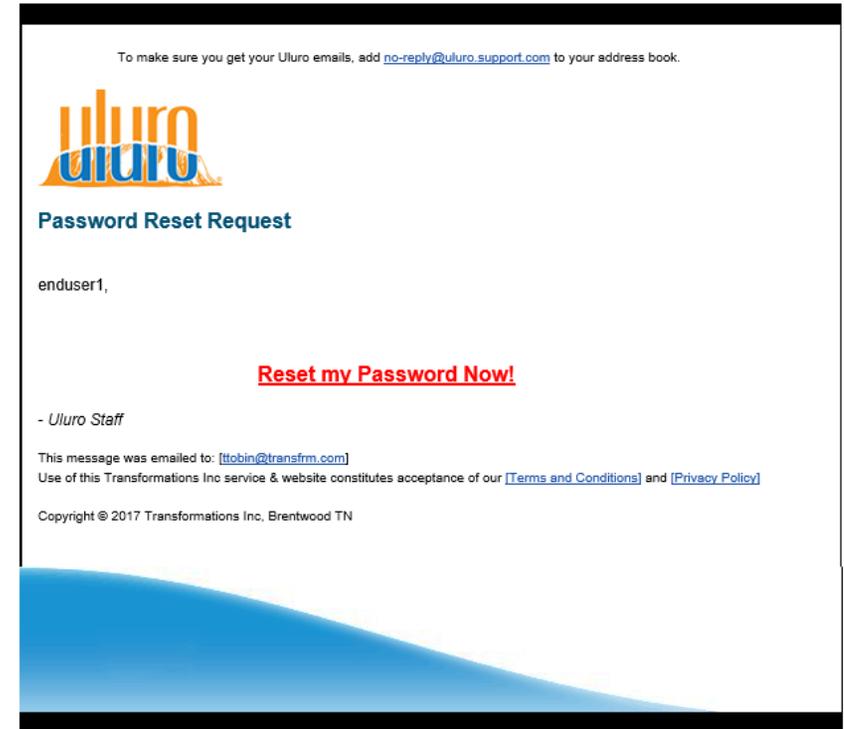
QUESTION 1 ▼

ANSWER 1 Required

QUESTION 2 ▼

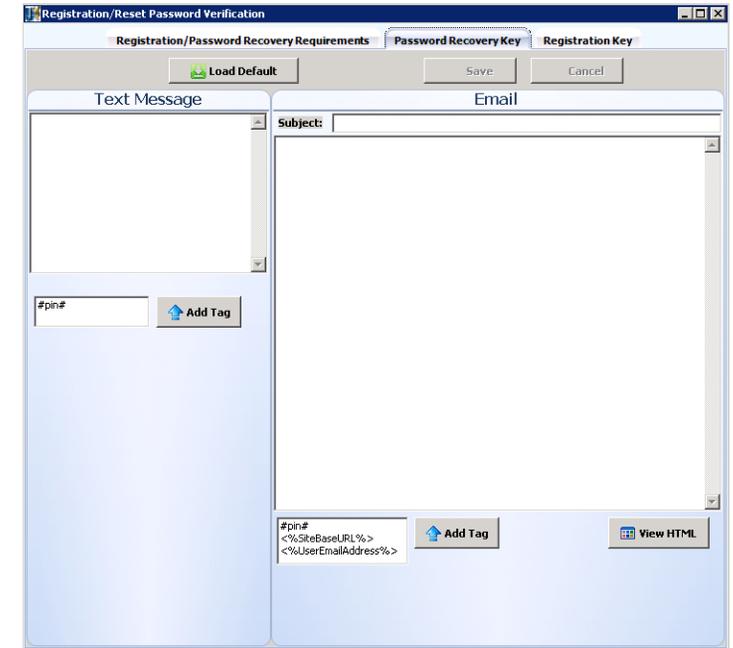
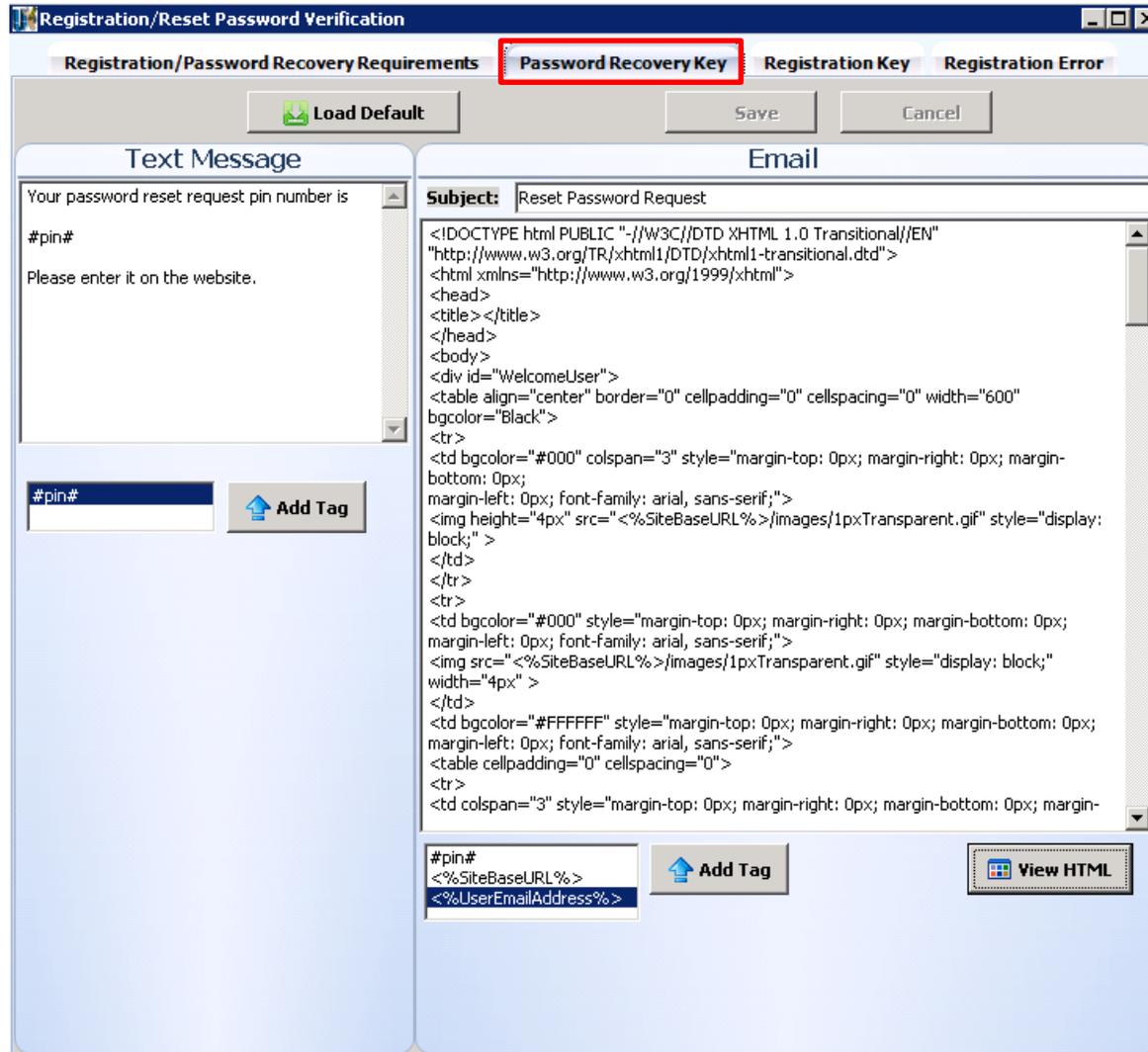
ANSWER 2 Required

ENCRYPTED
128-bit SSL



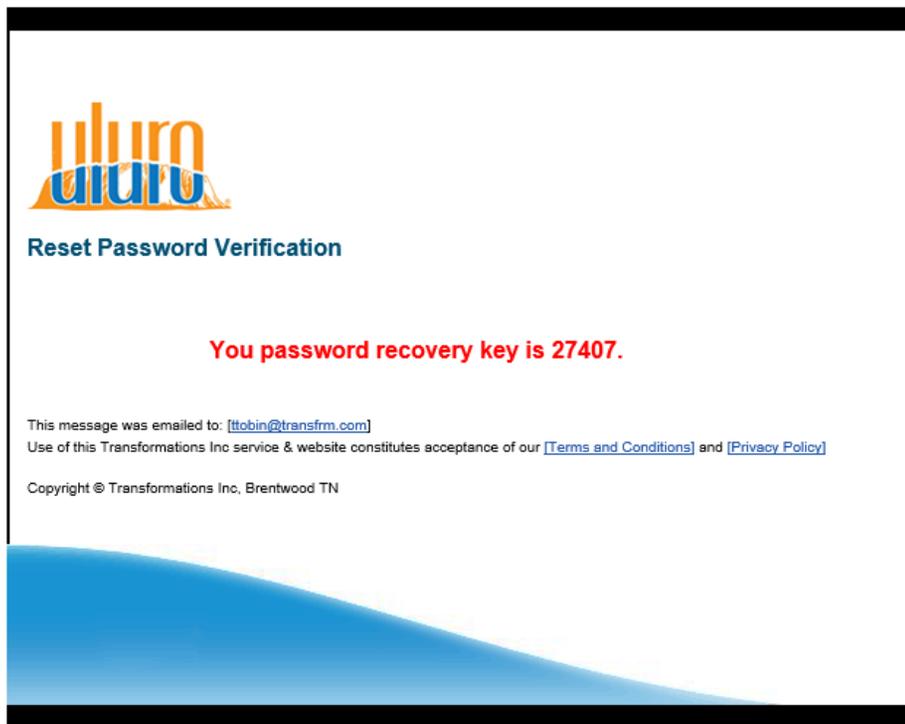
If the keys are enabled, the Email/Text Message must be setup.

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.



Account Recovery

Your privacy is important to us. We will not rent or sell your personal information.

MOBILE NUMBER Required

PASSWORD Required
MINIMUM LENGTH IS 8.

CONFIRM PASSWORD Required

RECOVERY EMAIL Required

FULL NAME Required

Security Questions

QUESTION 1 Required

ANSWER 1 Required

QUESTION 2 Required

ANSWER 2 Required

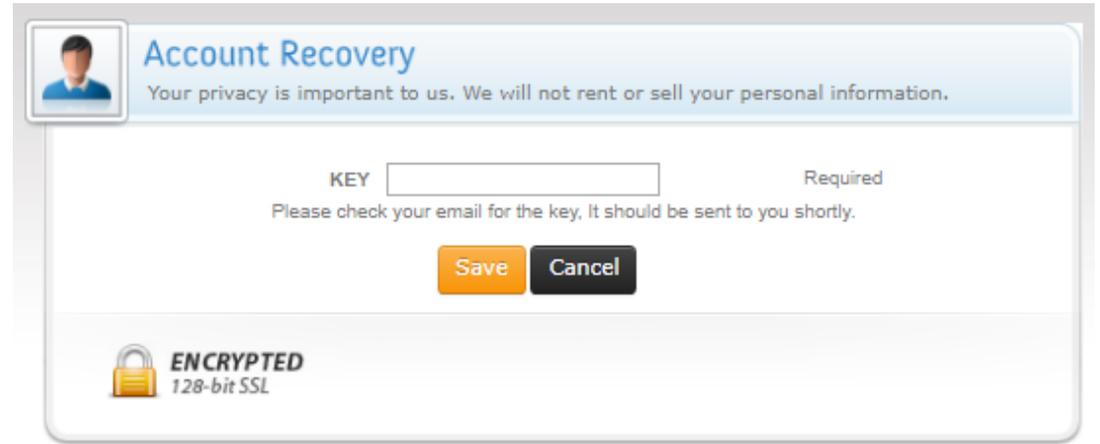
ENCRYPTED
128-bit SSL



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:

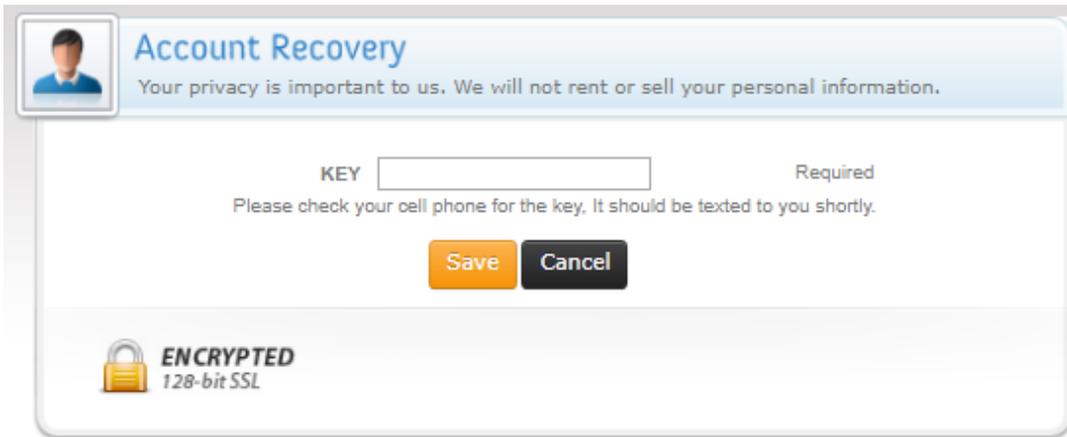


Account Recovery
Your privacy is important to us. We will not rent or sell your personal information.

KEY Required
Please check your email for the key. It should be sent to you shortly.

[Save](#) [Cancel](#)

 **ENCRYPTED**
128-bit SSL



Account Recovery
Your privacy is important to us. We will not rent or sell your personal information.

KEY Required
Please check your cell phone for the key. It should be texted to you shortly.

[Save](#) [Cancel](#)

 **ENCRYPTED**
128-bit SSL

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

Recovery Complete!

You may now log in.

[Home](#)

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.

Registration/Reset Password Verification

Registration/Password Recovery Requirements | **Password Recovery Key** | **Registration Key** | **Registration Error**

Use Generic Registration Error Save Cancel

Generic Registration Error Message

Registration Error: There is a document lookup error.

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.

New User Registration
Your privacy is important to us. We will not rent or sell your personal information.

The information you provided does not match any records

MOBILE NUMBER: 5555555555 Required

ACCOUNT NUMBER AS IT APPEARS ON YOUR STATEMENT: 1 Required

ACCOUNT NAME AS IT APPEARS ON YOUR STATEMENT: 1 Required

USER ID: 1 Required

PASSWORD: Required
MINIMUM LENGTH IS 8. MUST CONTAIN AT LEAST ONE UPPERCASE AND NUMBER!

CONFIRM PASSWORD: Required

RECOVERY EMAIL: ttobin@transfrm.com Required

CONFIRM EMAIL: ttobin@transfrm.com Required

FULL NAME: Tiffany Tobin Required

LAST 4 DIGITS OF SSN: 1111 Required

Security Questions

QUESTION 1: What is your favorite football team? Required

ANSWER 1: Required

Save Cancel

ENCRYPTED
128-bit SSL

New User Registration
Your privacy is important to us. We will not rent or sell your personal information.

Registration Error: There is a document lookup error.

MOBILE NUMBER: 5555555555 Required

ACCOUNT NUMBER AS IT APPEARS ON YOUR STATEMENT: 1 Required

ACCOUNT NAME AS IT APPEARS ON YOUR STATEMENT: 1 Required

USER ID: 1 Required

PASSWORD: Required
MINIMUM LENGTH IS 8. MUST CONTAIN AT LEAST ONE UPPERCASE AND NUMBER!

CONFIRM PASSWORD: Required

RECOVERY EMAIL: ttobin@transfrm.com Required

CONFIRM EMAIL: ttobin@transfrm.com Required

FULL NAME: Tiffany Tobin Required

LAST 4 DIGITS OF SSN: 1111 Required

Security Questions

QUESTION 1: What is your favorite football team? Required

ANSWER 1: Required

Save Cancel

ENCRYPTED
128-bit SSL

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.

Register

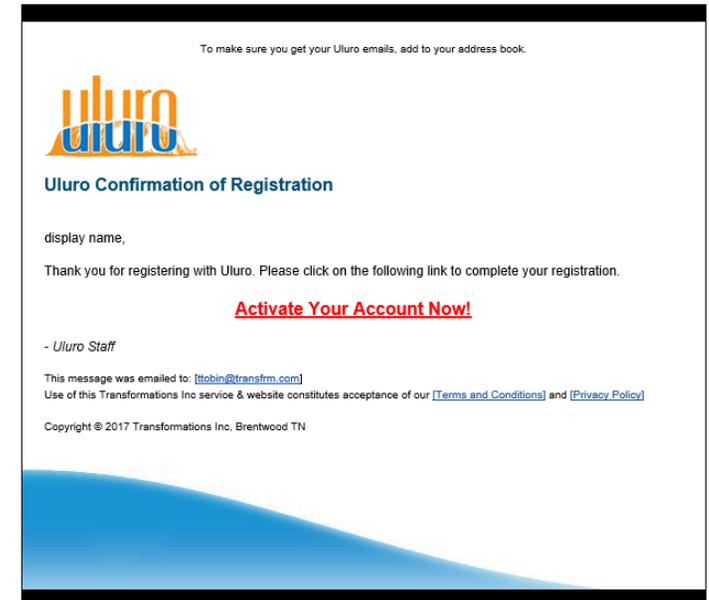
This email will be sent to a user that has used the default self-registration page to register. The user will be in New status until the activation link is clicked and the user logs into the site. Once the user logs in successfully, the user will be listed as Active status and no longer be in New status.



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.

The screenshot shows the Uluro administration interface. The top navigation bar includes 'Basic', 'Advanced', 'Page Setup', 'Payments', 'Users', and 'Reports'. The 'Advanced' tab is selected. Below this, there are buttons for 'Web Page Display', 'CSS Editor', and 'Save'. The main content area has a navigation menu with 'Contact Us', 'Help', 'FAQ', 'Privacy', 'Terms', 'About Us', 'Emails/Messages', and 'Disclaimer'. Under 'Emails/Messages', the 'Register' option is selected. The main editor area displays HTML code for the registration email. On the right side, there is a 'View HTML' button and a table of 'Available Tags' with variables like <%SiteBaseURL%>, <%AdminEmail%>, <%EmailTitleDesc%>, <%UserFullName%>, <%UserEmailAddress%>, and <%CurrentYear%>. Below the tags is an 'Enable Tracking' checkbox.



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 not active yet; they have not completed the registration process.

Edit Users
Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Update User Information For: Tiffany Tobin - #1532

USERNAME: required

STATUS: **New** ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: (optional)

LAST 4 SSN: Your data will be encrypted

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

ENCRIPTED
128-bit SSL

User Account Management

Manage User's Profile
Maintain user's personal details and payment information

Manage User's Email
Update a user's email address or set password expiration.

Add & Remove Accounts
Use this form to add or delete accounts

a

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.

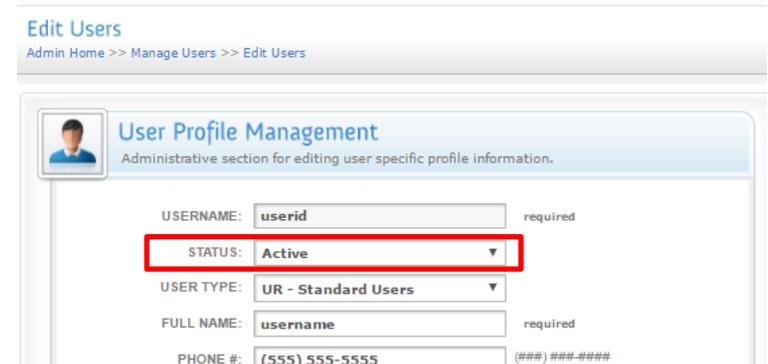
This email will also get triggered once a new web user completes self-registration using the default registration page.

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.



Edit Users
Admin Home >> Manage Users >> Edit Users

User Profile Management
Administrative section for editing user specific profile information.

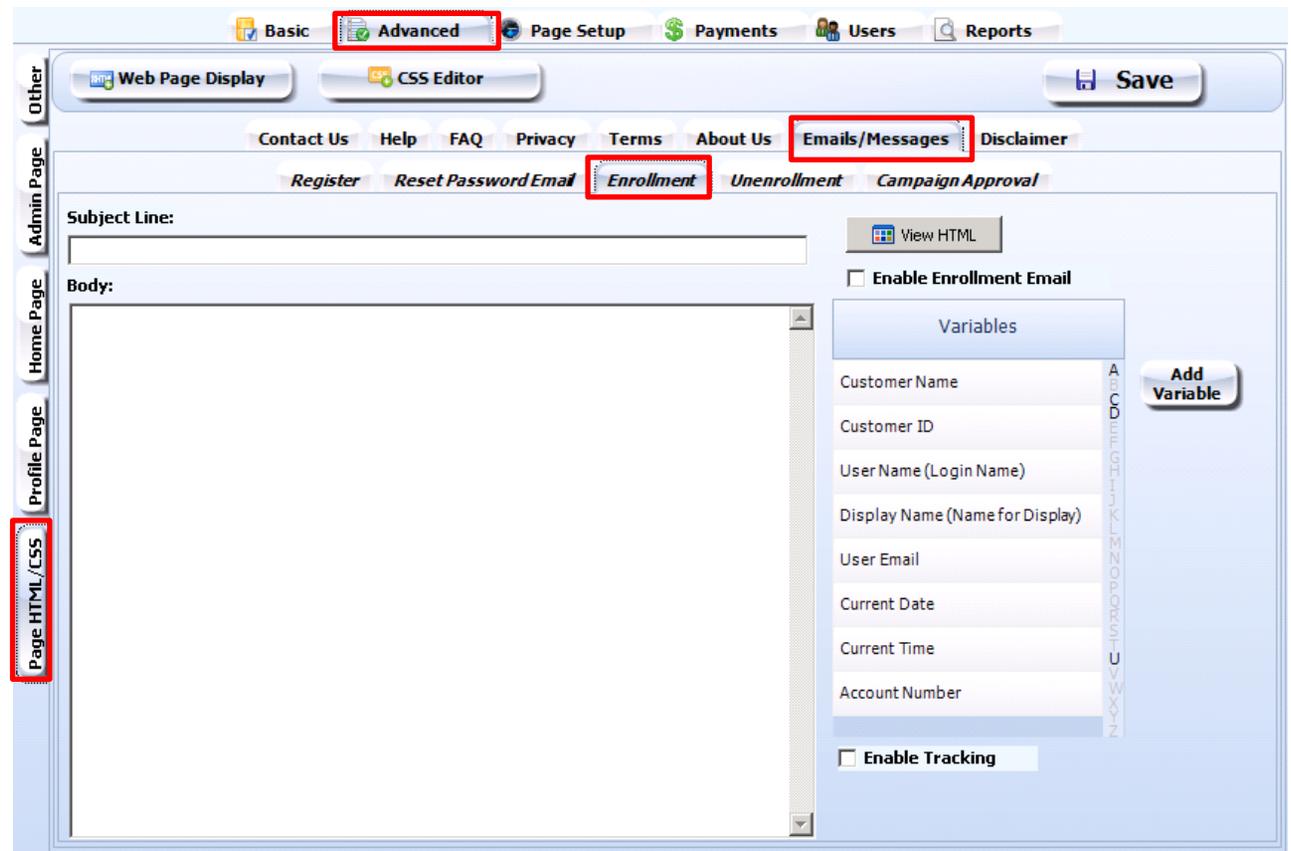
USERNAME: required

STATUS: Active ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-####



Basic **Advanced** Page Setup Payments Users Reports

Web Page Display CSS Editor Save

Contact Us Help FAQ Privacy Terms About Us **Emails/Messages** Disclaimer

Register Reset Password Email **Enrollment** Unenrollment Campaign Approval

Subject Line:

Body:

View HTML

Enable Enrollment Email

Variables

- Customer Name
- Customer ID
- User Name (Login Name)
- Display Name (Name for Display)
- User Email
- Current Date
- Current Time
- Account Number

Enable Tracking

Add Variable

Other Admin Page Home Page Profile Page **Page HTML/CSS**

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.

Profile Maintenance
User Main >> Profile Maintenance

My Profile
Your privacy is important to us. We will not share your personal information.

FULL NAME: required

ADDRESS 1: Required

ADDRESS 2: Optional

CITY: Required

STATE: Required

POSTAL CODE: Required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

ALLOW VOICE CALLS:

MOBILE PHONE #: (###) ###-#### Required

LAST 4 SSN: Your data will be encrypted Required

PRIMARY EMAIL:

MAKE PAYMENTS:

DELIVERY METHOD: Send Mail Send Email

UN-ENROLL:

ENCRYPTED
128-bit SSL

Basic **Advanced** Page Setup Payments Users Reports

Web Page Display CSS Editor Save

Contact Us Help FAQ Privacy Terms About Us **Emails/Messages** Disclaimer

Register Reset Password Email Enrollment **Unenrollment** Campaign Approval

Subject Line:

Body:

Enable Enrollment Email

Variables

Customer Name	A
Customer ID	00000000000000000000000000000000
User Name (Login Name)	U
Display Name (Name for Display)	
User Email	
Current Date	
Current Time	
Account Number	

Enable Tracking

Other
Admin Page
Home Page
Profile Page
Page HTML/CSS

You can add variable tags throughout the email. Select the variable 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 checking the **Enable Enrollment Email** checkbox or it will not be sent.

Import Web Users

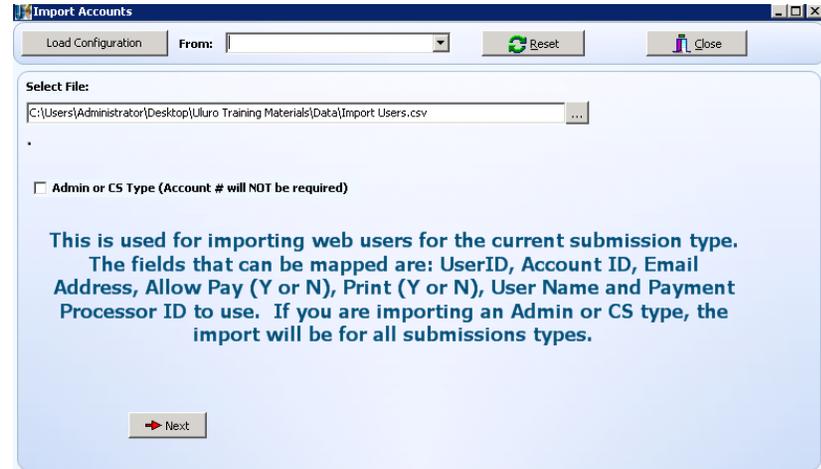
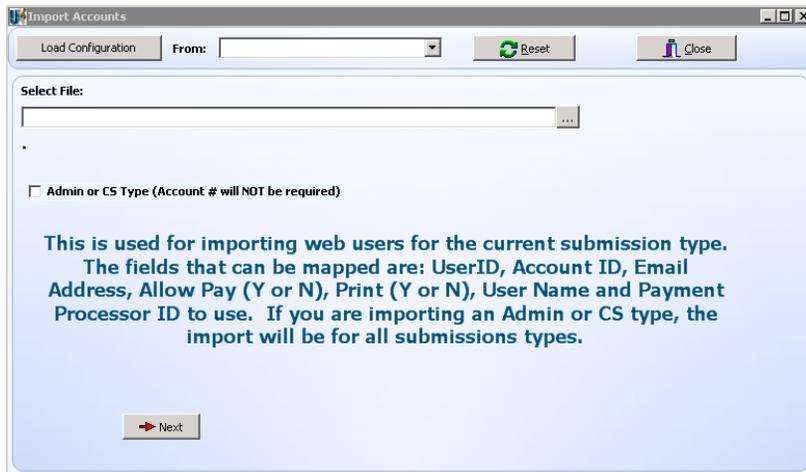
This allows you to import web user accounts into Uluro from an outside portal. It prevents users from having to enroll in a new portal. This is done at a submission level, not at the site (client) level.

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.

The screenshot displays the 'Web' configuration page in the Uluro Web 3.0 uSetup application. The 'Web' tab is selected and highlighted with a red box. On the right-hand side, a vertical toolbar contains several buttons, with the 'Import Accounts' button highlighted by a red rectangle. The main content area is divided into several sections:

- Basic Settings:** Includes checkboxes for 'Display Submissions on the Web', 'Accounts/Users can view Documents', 'Enable Payments', 'Submissions Require Web Approval', 'Web Show PDF Only (No Image)', 'Require Comments on Partial Payments', and 'Allow Editing of Exclusions'.
- eStatement Verify:** Features a 'Verify User has Viewed eStatement' checkbox, input fields for 'Number of Days for Verification' and 'Additional Emails', and checkboxes for 'Do not change user to Mail Only' and 'Autocreate New Submission'. A 'Send Email To' field is also present.
- PDF Pregeneration:** Contains checkboxes for 'After Breakpack' and 'When Job Status goes to 'Ready To Print'', along with a 'PDF Directory/PDF Name Template' input field.
- Single Signon PDF:** Includes a checkbox for 'Send Document List (CSV File) to FTP Site' and input fields for 'FTP Site', 'Userid', and 'Password'.
- eDocument Settings:** Features checkboxes for 'Allow View Images', 'Allow View as PDF', 'Allow Reconcile', 'Allow Save Nickname', and 'Allow Download CSV', along with an 'Addn Field Display' dropdown menu.
- Document Exclusions:** Organized into three columns: 'Don't Email', 'Don't Fax', and 'Don't Display', each with 'Omits' and 'eXcludes' checkboxes.
- "Add User Accounts" Page Options (Web 3):** Includes a checked checkbox for 'Validate Account # (Account # must exist in the system)' and radio buttons for 'Name On Account Field' set to 'Required'.

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 it 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.

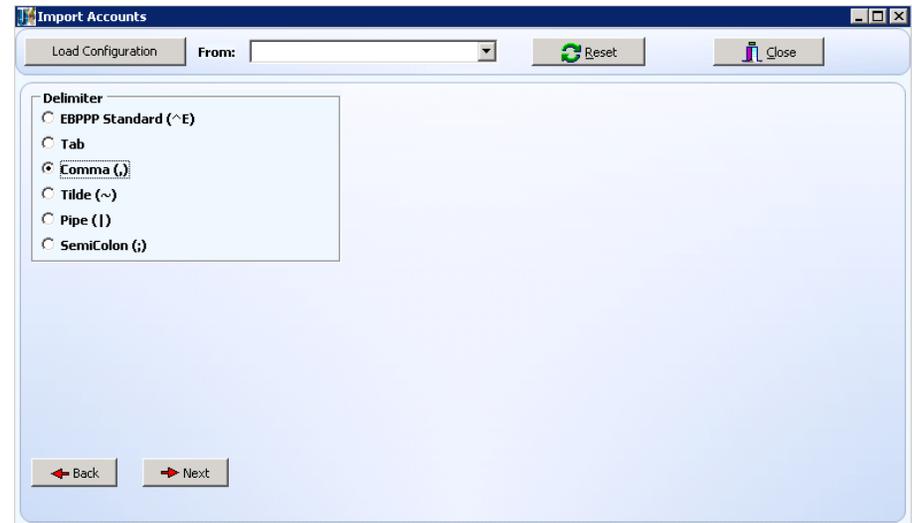
Select a file to import.

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 have account numbers.

Click Next.

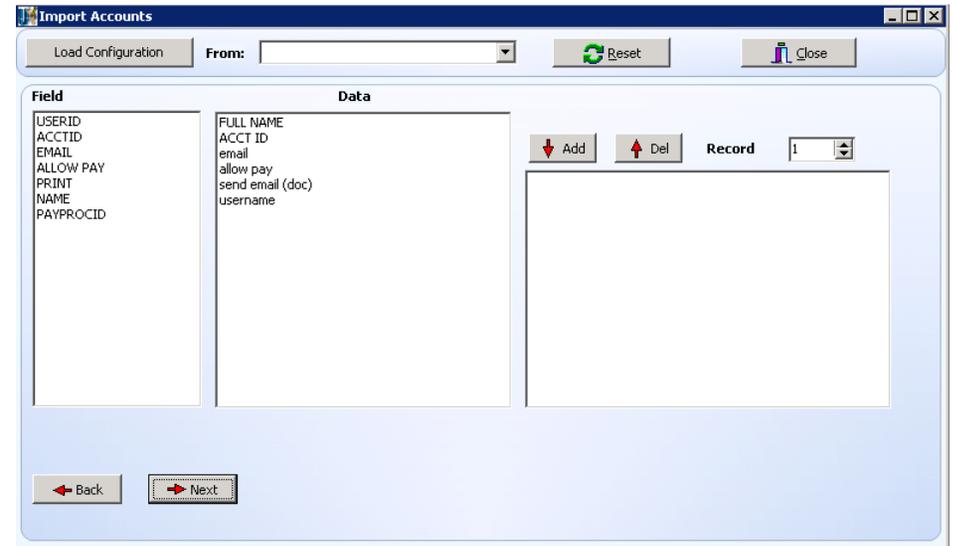
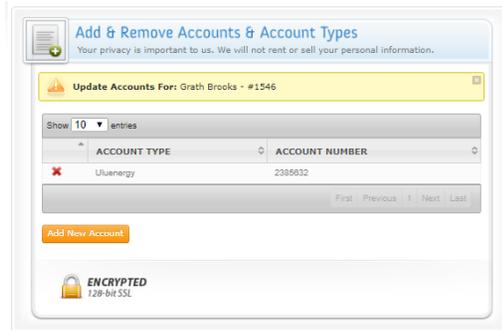
Select the delimiter of the file you are importing. You can only import web users using a delimited data file.

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 accounts 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. Foreexample, 5 if the payment processor desired is Vantiv. This field is only displayed when an admin edits a user.

PRIMARY EMAIL:

DELIVERY METHOD: Send Mail Send Email Send Fax

SELECT EMAIL TYPE:

ALLOW PAYMENTS:

FULL NAME: required

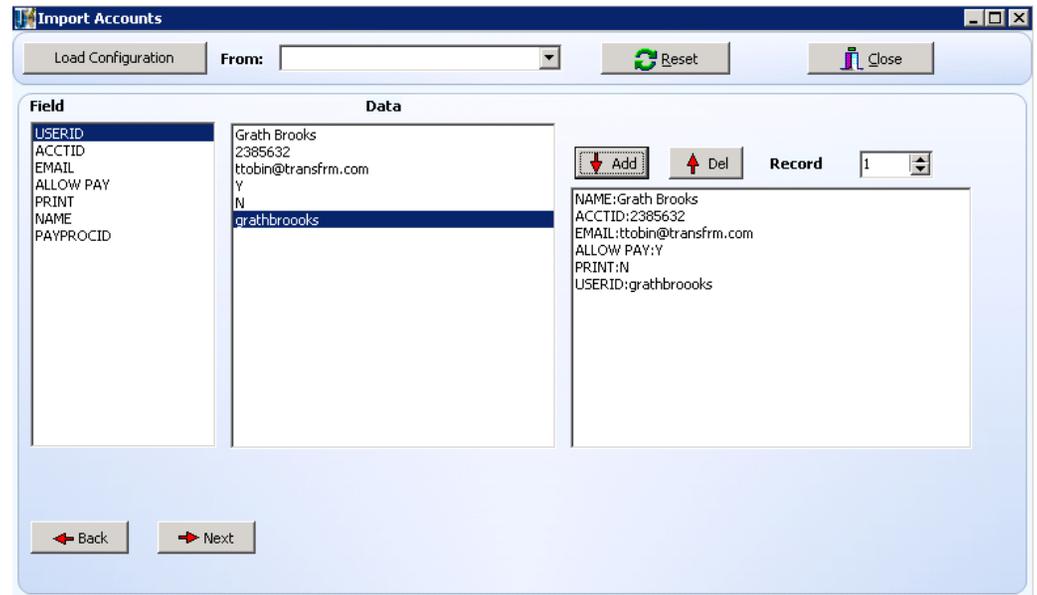
MERCHANT ACCOUNT:

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.



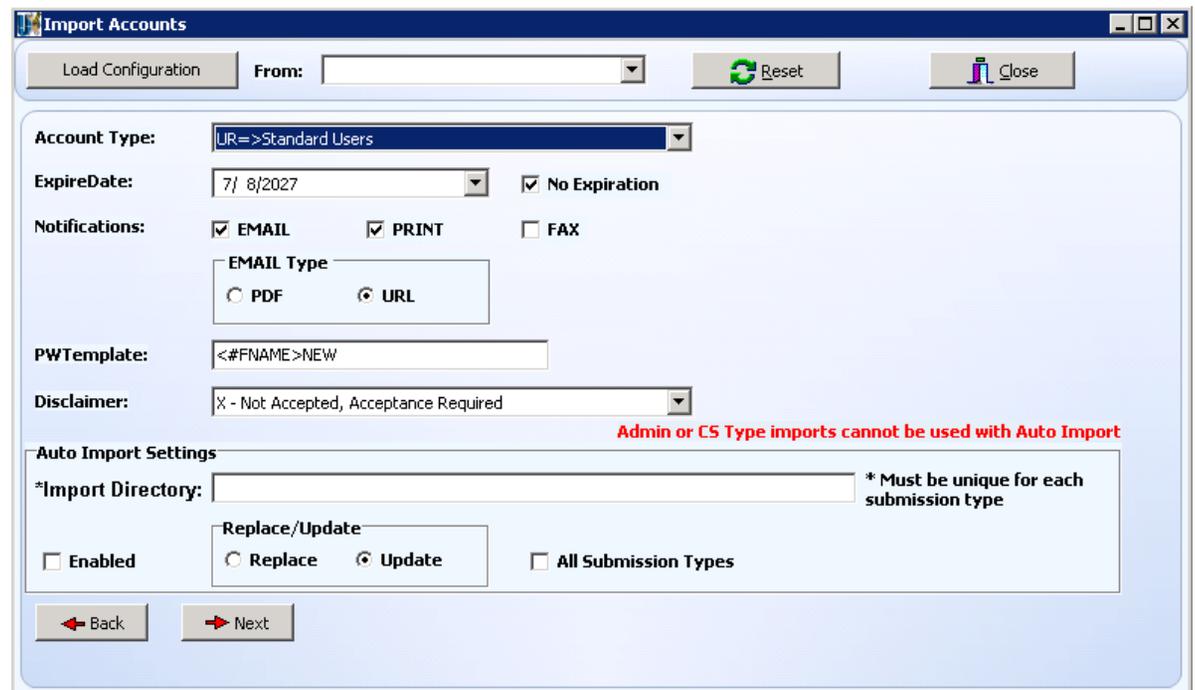
Account Type – Select the type of users being imported.

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.

ACCOUNT EXPIRES: M/d/yyyy



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.

ACCEPTED DISCLAIMER: M/d/yyyy

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

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:

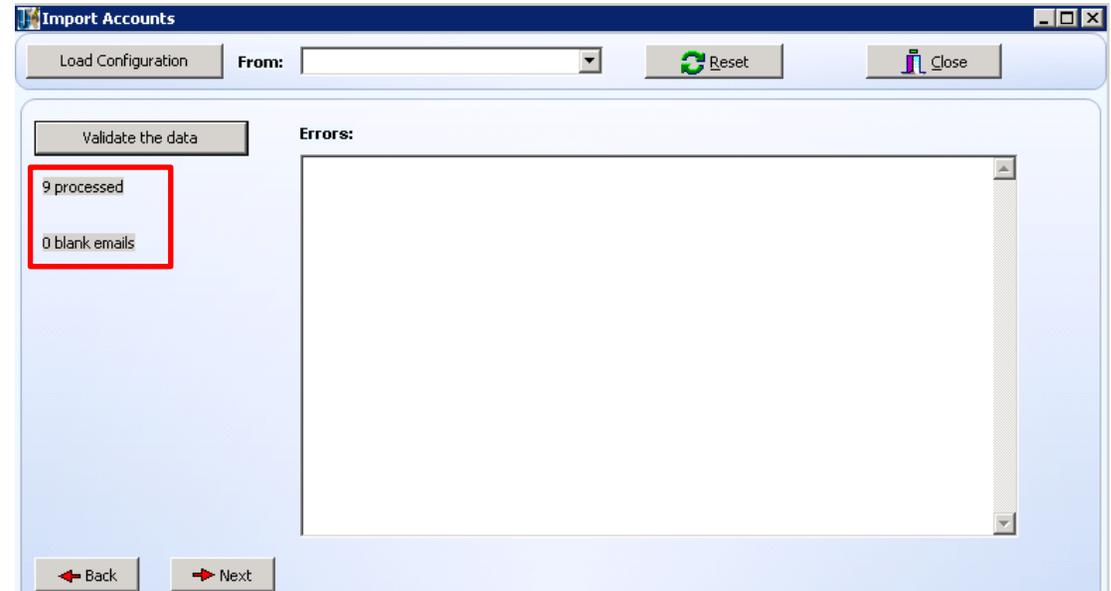
Include the UserID, new password, and URL so users will be able to login and know the new site.

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.

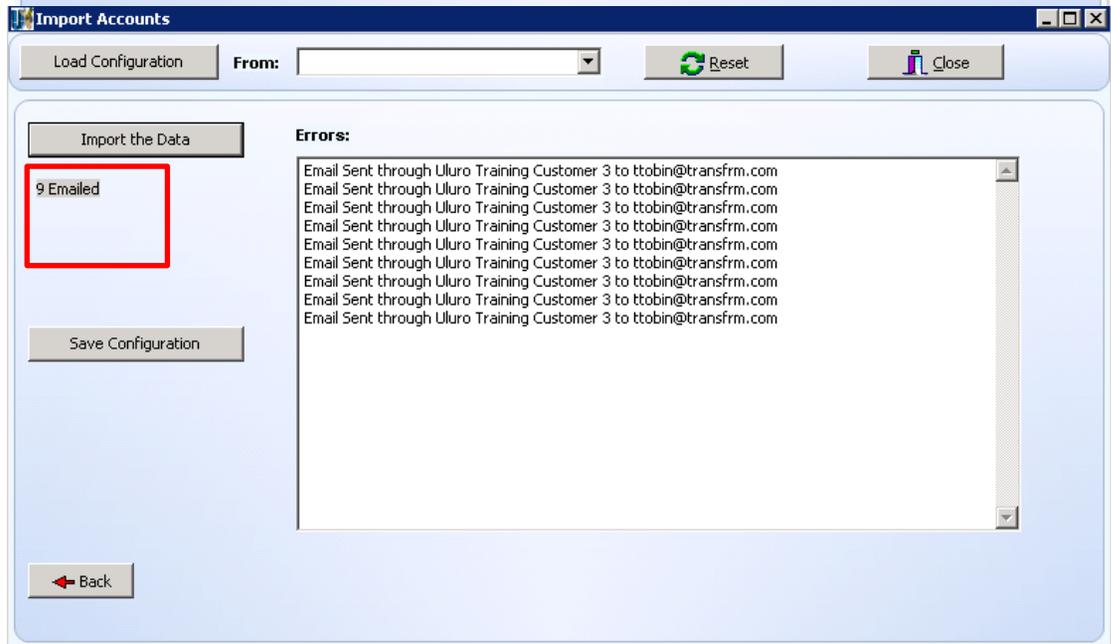
If errors have occurred, the errors will have to be resolved, and the data file with the adjustments will need to be imported.

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.

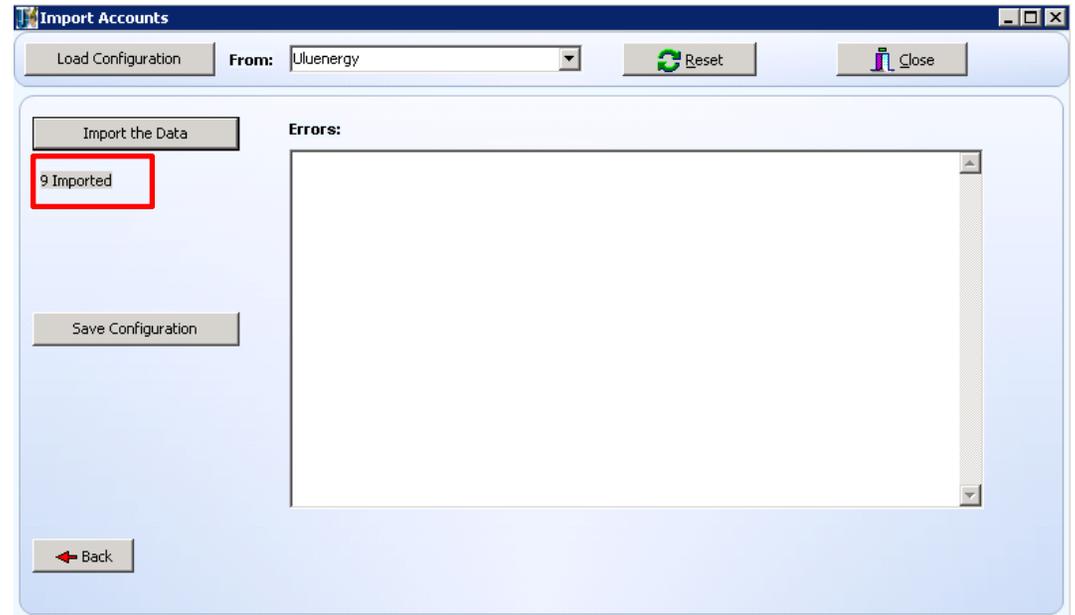


If you don't send the emails, it will display that the records were imported.

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.

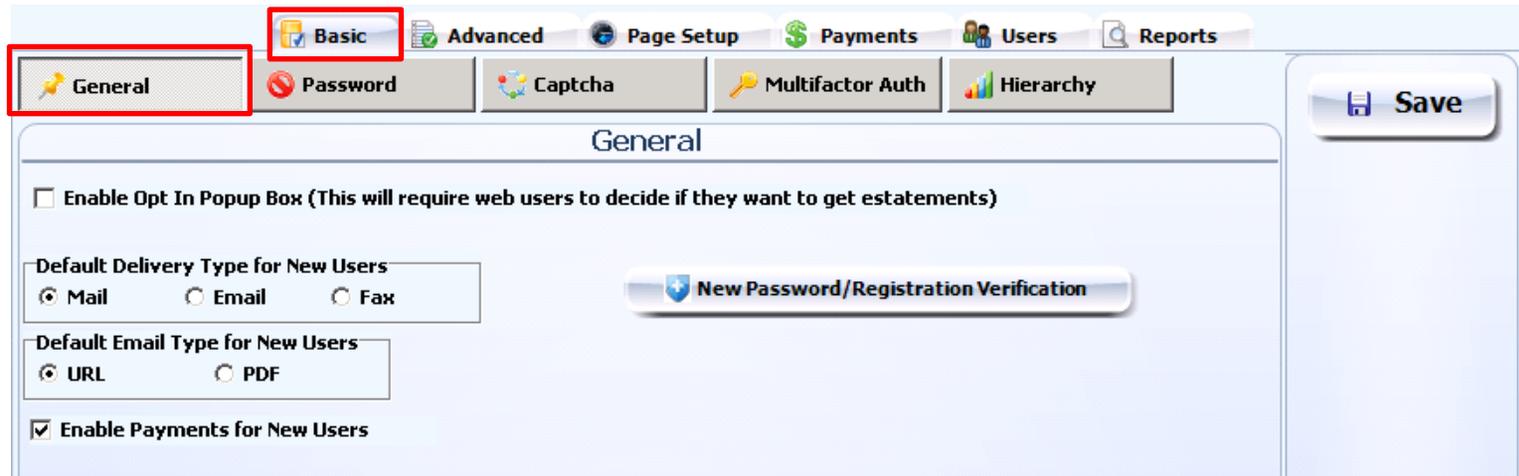
Once they click Agree and Save, they will be directed back to the main page of the site to login using their new password.



Standard User Experience

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 delivery 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 method will remain mail.

Ask Me Later – The user will have 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.

Profile Maintenance
User Main >> Profile Maintenance

My Profile
Your privacy is important to us. We will not share your personal information.

FULL NAME: required

ADDRESS 1: Required

ADDRESS 2: Optional

CITY: Required

STATE: Required

POSTAL CODE: Required

PHONE #: (###) ### -#### Required

ALLOW TEXT MESSAGE:

ALLOW VOICE CALLS:

MOBILE PHONE #: (###) ### -#### Required

LAST 4 SSN: Your data will be encrypted Required

PRIMARY EMAIL:

MAKE PAYMENTS:

DELIVERY METHOD: Send Mail Send Email

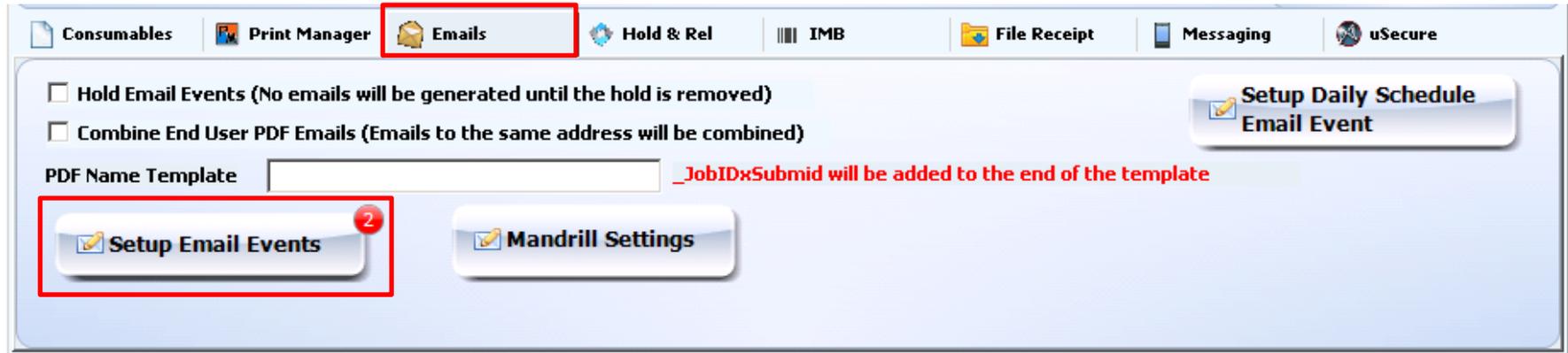
SELECT EMAIL TYPE:

UN-ENROLL:

ENCRYPTED
128-bit SSL

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).

The screenshot shows the 'Submission Transactions' window. The top section is titled 'Submission Information' and contains the following details:

- Sub ID:** 1628 **Status:** Print Manager
- Type:** UluroGas
- Customer:** Uluro Training Customer 3
- Received:** 7/18/2017 6:51:03 AM **Via:** FTP
- Map:** Uluro Training Customer 3\Uluro Gas.nmp
- # Docs:** 6 **# Pages:** 6
- File Dir:** \trans-qa1\SUBMIT\
- File Name:** 20170717090601659Uluro_Gas
- Orig File:** UluroGasData.csv
- MD5 Sum:** 8D8905FE9CCCC118CEE24AB8F4DF1F69
- PS Jobid:** 1092 **Job Status:** Print Manager
- Form:** [Empty]
- Approved:** **Date:** [Empty] **By:** [Empty]
- Reason:** [Empty]
- Expires:** **Date:** [Empty]

Below the submission information is a navigation bar with tabs: Transactions, **Email Events**, Emails, Exclusions, Text Events, Messages, HTML Events, HTML Emails, uSecure, Voice Events, Messages. The 'Email Events' tab is selected and highlighted with a red box.

The 'Email Events' tab displays a table with the following data:

ID	Created	Status	Processed	Email Address
51902	7/18/2017 6:51:30 AM	Hold		
51903	7/18/2017 6:51:30 AM	Hold		

Context menus are visible for the 'Hold' status cells in the table. The first row's context menu has 'Queue' and 'Cancel' options, with 'Queue' highlighted by a red box. The second row's context menu also has 'Queue' and 'Cancel' options.

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.

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.

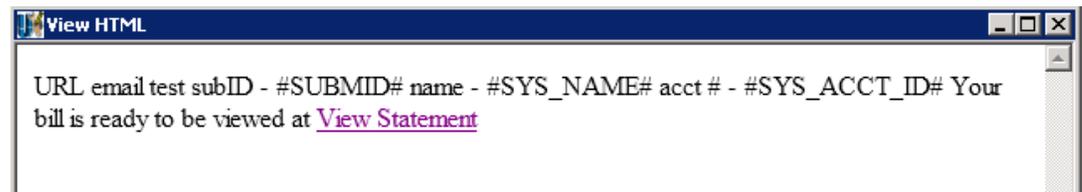
Tags – These can be added to the subject line, or the body or the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.



Tips from Transformations:

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

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



Sample Setup:

The screenshot shows the 'Email Events Setup' window. The 'Event' dropdown is set to 'Send End User PDF Email'. The 'To Email Addresses' field is empty. The 'Subject' field contains 'PDF email test'. The 'Body' field contains the following text: 'PDF email test', 'subID - #SUBMID#', 'name - #SYS_NAME#', and 'acct # - #SYS_ACCT_ID#'. There is an unchecked 'HTML' checkbox and a 'View HTML' button. To the right of the 'To Email Addresses' field is an 'Add Tag' button and a list of tags: '#CUSTID#', '#CUSTNAME#', '#SUBID#', '#SUBNAME#', '#SUBMID#', '#ORGFILNAME#', and '#SYS_DOCDATE#'. At the bottom, a table lists event types and their subjects.

Event Type	Subject
Send End User PDF Email	PDF email test
Send End User URL Email	Send URL email test

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.

Setting

Combine Emails	
<input type="checkbox"/> Enable	<input type="checkbox"/> Combine Body

Combine Emails	
<input type="checkbox"/> Enable	<input checked="" type="checkbox"/> Combine Body



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 same 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.

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

To ttobin@transfrm.com

URL email test subID - 1632 name - Alex Wright acct # - 71701 Your bill is ready to be viewed at [View Statement](#)

Setting

Combine Emails	
<input checked="" type="checkbox"/> Enable	<input type="checkbox"/> 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 not list the body that would go to each user. It uses one body instead of showing all of them.

To ttobin@transfrm.com

URL email test subID - 1631 name - Matthew Aaron acct # - 71698 Your bill is ready to be viewed at [View Statement](#)

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
<input checked="" type="checkbox"/> Enable <input checked="" type="checkbox"/> 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:

The screenshot shows the 'Email Events Setup' window with the following configuration:

- Event:** Send End User URL Email
- Combine Emails:** Enable, Combine Body
- To Email Addresses:** (Empty list)
- Subject:** Send URL email test
- Body:** URL email test
subID - #SUBMID#
name - #SYS_NAME#
acct # - #SYS_ACCT_ID#

Your bill is ready to be viewed at View Statement
- HTML:** HTML
- View HTML:** (Button)
- Add Tag:** Add
- Tags List:**
 - #CUSTID#
 - #CUSTNAME#
 - #SUBID#
 - #SUBNAME#
 - #SUBMID#
 - #ORGFILNAME#
 - #SYS_DOCDATE#

Event Type	Subject
Send End User PDF Email	PDF email test
Send End User URL Email	Send URL email test

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.

Original Submission File: bd2		Submission Email Report		8/28/2014 3:45:20 PM	
Submission ID: 134995		Submitter ID: BankLetter		Process Date:	
Client: Transformations Inc		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	████████@transfrm.com	1		
479-6	Mr Ricardo Balaam	████████@transfrm.com	1		
479-6	Mr Ralph Adee	████████@transfrm.com			
517-3	Miss Lyric Alberto Februaris	████████@transfrm.com	1		
521-5	Ms Jenifer Alberto Februaris	████████@transfrm.com			
537-1	Ms Mckenna Albright	████████@transfrm.com			
728-6	Miss Keeley Avarello	████████@transfrm.com			
517-3	Mr Dakota Barclay	████████@transfrm.com			
521-5	Ms Maanika Barman	████████@transfrm.com			
537-1	Mr Damian Barnes	████████@transfrm.com			
728-6	Ms Clara Blokhine	████████@transfrm.com			
		Total Emails -	13	Total Combined -	4

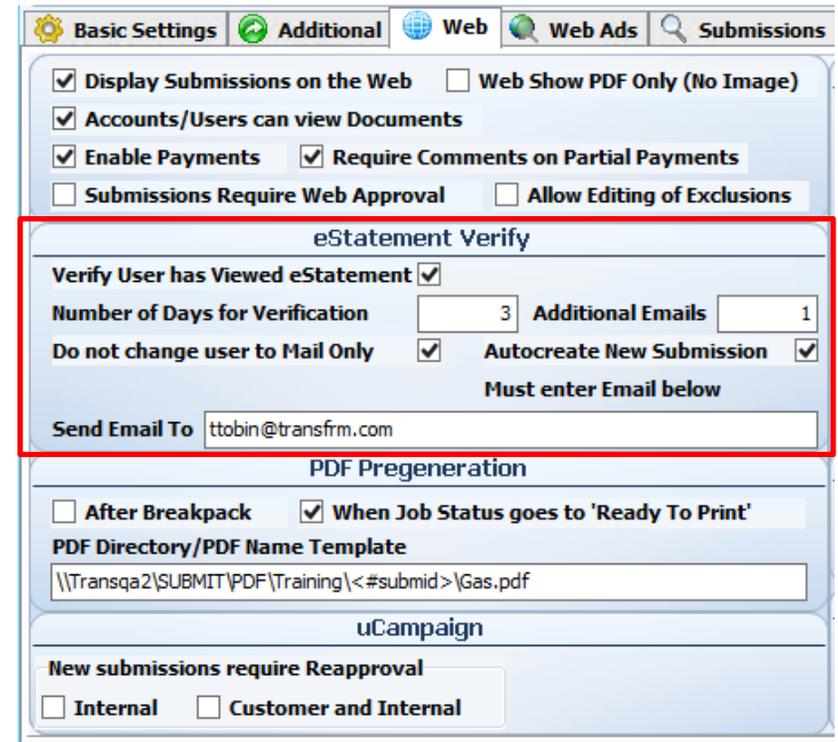
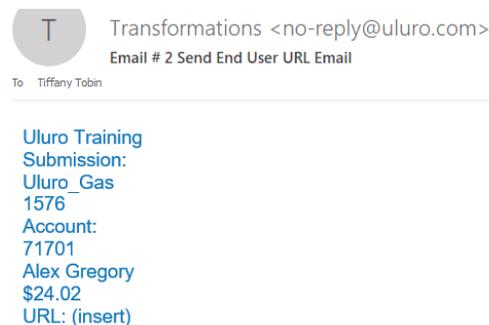
eStatement Verify

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 eStatement – 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

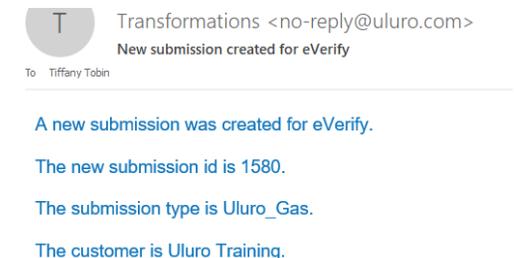


additional email).

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 Submission – 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.



The screenshot shows the 'Web' settings tab with the following options:

- Display Submissions on the Web
- Web Show PDF Only (No Image)
- Accounts/Users can view Documents
- Enable Payments
- Require Comments on Partial Payments
- Submissions Require Web Approval
- Allow Editing of Exclusions



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.

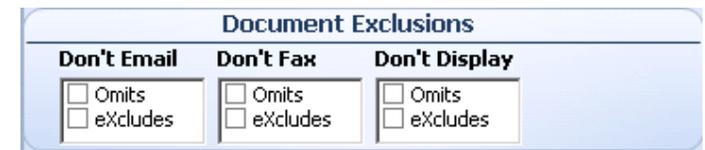
Document Exclusions

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 will 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 regardless of these settings.



The screenshot shows the 'Document Exclusions' settings panel with three columns:

Don't Email	Don't Fax	Don't Display
<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes	<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes	<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes

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.

The screenshot shows the Uluro Admin Page settings. The 'Other' section includes a 'PDF Hash Key' field and a 'Save' button. The 'Admin Page' section has several options: 'Disable IFrame Display' (checked), 'Enable Responsive Pages (Mobile)' (unchecked), 'Show Accounts with documents ONLY' (unchecked), and 'Mask Account Number' (checked). A red box highlights the 'Disable IFrame Display' option with the text: 'To use Uluro Web in an iframe, you must uncheck this. This will cause a security vulnerability.' Another red box highlights the 'Mask Account Number' option and the 'Number of unmasked characters' field, which is set to 3.

The screenshot shows the Uluro User Main page. The top navigation bar includes the Uluro logo, a user profile section with 'username', 'My Profile', and 'Sign Out', and a search bar with 'Google'. The main content area is titled 'User Main' and includes a 'View Payment History' link. Below this is a search filter section with 'Look For:' and 'And (Optional):' dropdowns, both set to 'Account #', and 'Which:' dropdowns, both set to 'equals'. There are 'Search' and 'Reset' buttons, and 'Pay Now' and 'Combine Pdf' buttons. Below the search filter is a table of account activity. The table has columns for 'Account #', 'Name', 'Date', 'Balance', 'Balance Due', 'Pay', and 'Pdf'. The 'Account #' column is highlighted with a red box. The table contains 7 rows of data for Tiffany Tobin, all with a balance of 480.65 and a balance due of 480.65. Each row has an 'Activity Log' link.

Account #	Name	Date	Balance	Balance Due	Pay	Pdf
*****789	Tiffany Tobin	07/18/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>
*****789	Tiffany Tobin	07/18/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>
*****789	Tiffany Tobin	07/18/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>
*****789	Tiffany Tobin	07/18/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>
*****789	Tiffany Tobin	07/18/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>
*****789	Tiffany Tobin	07/17/2017	480.65	480.65	<input type="checkbox"/>	<input type="checkbox"/>

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.

The screenshot shows the Uluro web interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with a profile picture and links for "My Profile" and "Sign Out". Below the header, there is a navigation bar with "View Statements" and a breadcrumb trail: "Admin Home >> View Dashboard >> View Document List >> View Statements". A red box highlights four advertisement cards: "Document Composition" (green), "File Submission Validation & Proofing" (blue), "Reliability & Verification" (red), and "E-Delivery & Archive" (orange). Below the ads is a pagination control with "Go To Page:" and "Total Pages: 6".

Below the advertisement area, a statement page is shown. It features a blue header bar with the Uluro Bank & Trust logo (labeled 4), the text "Uluro Bank & Trust, 200 Seaboard Ln, Franklin, TN 37067", and the Uluro Bank & Trust logo (labeled 5). The statement date is "2/1/2017" (labeled 6). The page number is "Pg 1 of 6".

The statement content includes the account holder's name and address: "Tiffany Tobin, c/o Bill Faucet, 201 Seaboard Ln, Franklin, TN 37067". To the right, under "ACCOUNTS AT A GLANCE", it shows "Checking Balance: \$1,965.85" and "Savings Balance: \$3,500.00".

At the bottom, a table shows account details:

ACCOUNT	Previous Statement Balance on 1/1/2017	
CHECKING	Total Deposits	\$115.37
1010123456789	Total Withdrawals	\$5,245.51
	Total Service Charges	\$3,390.03
		\$5.00

Basic Settings | Additional | Web | Web Ads | Submissions | Print Configurations | Submission Ticket

Ad Area: 1 2 3 Enabled Start Date: 11/23/2016 End Date: 4/28/2033

4 5 6 Description: test web ad

Title: test web ad 1

Link: "https://www.google.com" target="_blank"

Display: <img <#title> src="../../images/ads/ad1.png" height="200" width="250" border="20" >

Display Ad on

Always Insert #4 Insert #8

Insert #1 Insert #5 Insert #9

Insert #2 Insert #6 Insert #10

Insert #3 Insert #7

Enabled	Inse...	Area	Description	Start Date	End Date	Title	Display
Y	0	1	test web ad	11/23/2016	4/28/2033	test web ad 1	<img <#title> src="../../images/ads/ad1.png" height="200" width="250" border="20" >
Y	0	2	Test Web Ad 2	7/30/2017	1/2/2034	Test Web Ad 2	<img <#title> src="../../images/ads/ad1.png" height="200" width="250" border="20" >

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.

Build Link

Protocol

HTTP HTTPS FTP Open in New Window

Site:

http://www.google.com

OK Cancel

Display – This is the source of the ad from the Images directory. The size of the image can be adjusted here. This is limited to 1000 characters and an HTML entry can be 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.

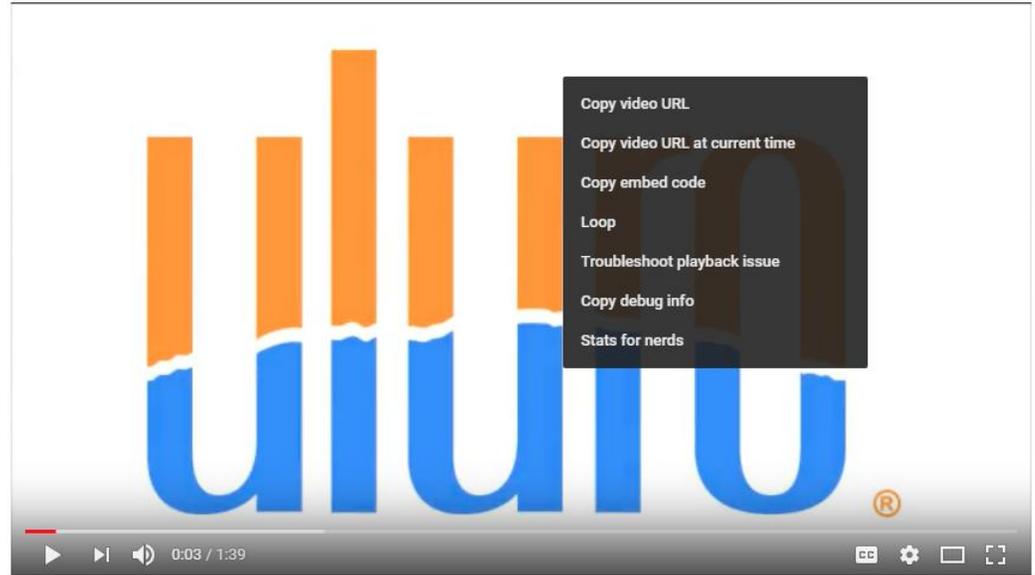
CSS Class – If you want to use CSS class with the image then enter the Class name. These CSS classes are setup mainly to define the Positions of the areas. They can be used to modify other characteristics of the Web Page. You can create a custom CSS class within the customized general.css for the site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

The screenshot shows a dialog box titled "Build Display Ad". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog is divided into two main sections. The first section, "Display Value Type", has a radio button labeled "Image" which is selected. The second section, "Protocol", has two radio buttons: "Local" (selected) and "Other". Below these sections are several input fields: "Source" with the text "ads/ad1.png", "Height" with the value "200", "Width" with the value "250", and "Border" with the value "20". There is also an empty "CSS Class" field. At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

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



What is Uluro ?

Basic Settings Additional Web Web Ads Submissions Print Configurations Submission Ticket

Ad Area: 1 2 3 4 5 6 Enabled Start Date: 10/26/2017 End Date: 3/31/2034 Description: Test Web Ad 4

Title: Test Web Ad 4

Link: "http://www.uluro.com"

Display: <iframe width="854" height="480" src="https://www.youtube.com/embed/eCkxrI5T87g" frameborder="0" allow="autoplay; encrypted-media" allowfullscreen></iframe>

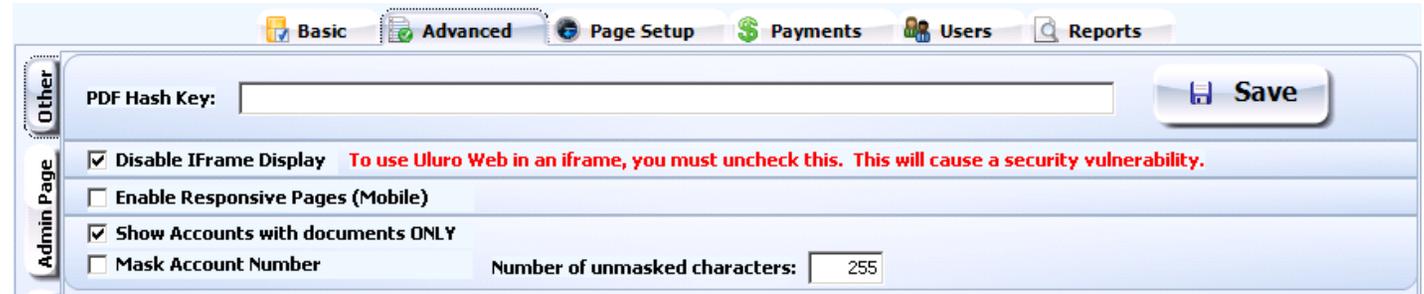
Display Ad on: Always Insert #4 Insert #8 Insert #1 Insert #5 Insert #9 Insert #2 Insert #6 Insert #10 Insert #3 Insert #7

Enabled	Inse...	Area	Description	Start Date	End Date	Title	Display
Y	1	4	Test Web Ad 4	10/26/2017	3/31/2034	Test Web Ad 4	<iframe width="854"

PDF Hash Key for Document Retrieval

This is a Web API that is designed to define the application programming 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.



The screenshot shows the Uluro Web 3.0 Admin Page interface. At the top, there are navigation tabs: Basic, Advanced, Page Setup, Payments, Users, and Reports. The 'Other' tab is selected. On the left, there are sub-tabs: Other and Admin Page. The main content area contains the following settings:

- PDF Hash Key:** A text input field with a 'Save' button to its right.
- Disable IFrame Display** *To use Uluro Web in an iframe, you must uncheck this. This will cause a security vulnerability.*
- Enable Responsive Pages (Mobile)**
- Show Accounts with documents ONLY**
- Mask Account Number** **Number of unmasked characters:**

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 = 'NYNNYNNNNNN' 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 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:

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <Documents xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
3  xsi:noNamespaceSchemaLocation="ULURO.xsd">
4  <Document id="123456" type="regular" created="2006-05-04">
5  <Account number="00012345678" email="test@test.com" name="John H. Doe"/>
6  <Miscellaneous>
7  <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
8  <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
9  <MiscellaneousText1>Regular Statement</MiscellaneousText1>
10 <MiscellaneousText2>MiscellaneousText20</MiscellaneousText2>
11 <MiscellaneousText3>MiscellaneousText30</MiscellaneousText3>
12 <MiscellaneousText4>MiscellaneousText40</MiscellaneousText4>
13 <MiscellaneousText5>MiscellaneousText50</MiscellaneousText5>
14 </Miscellaneous>
15 <Inserts>Inserts0</Inserts>
16 </Document>
17 <Document id="123457" type="notice" created="2006-05-04">
18 <Account number="00012345678" email="test@test.com" name="John H. Doe"/>
19 <Miscellaneous>
20 <MiscellaneousDate1>2006-05-04</MiscellaneousDate1>
21 <MiscellaneousDate2>2006-05-04</MiscellaneousDate2>
22 <MiscellaneousText1>Overdaft Notice</MiscellaneousText1>
23 <MiscellaneousText2>MiscellaneousText21</MiscellaneousText2>
24 <MiscellaneousText3>MiscellaneousText31</MiscellaneousText3>
25 <MiscellaneousText4>MiscellaneousText41</MiscellaneousText4>
26 <MiscellaneousText5>MiscellaneousText51</MiscellaneousText5>
27 </Miscellaneous>
28 <Inserts>Placeholder</Inserts>
29 </Document>
30 </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
```

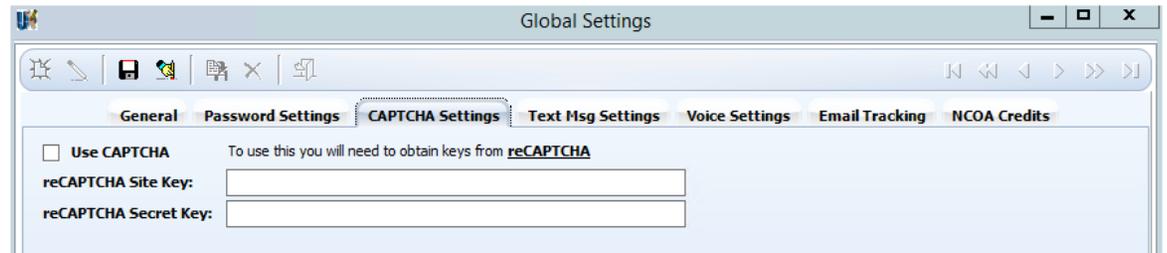
Further information and tests suites for HMAC-MD5 can be found at <http://tools.ietf.org/rfc/rfc2104.txt>.

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.



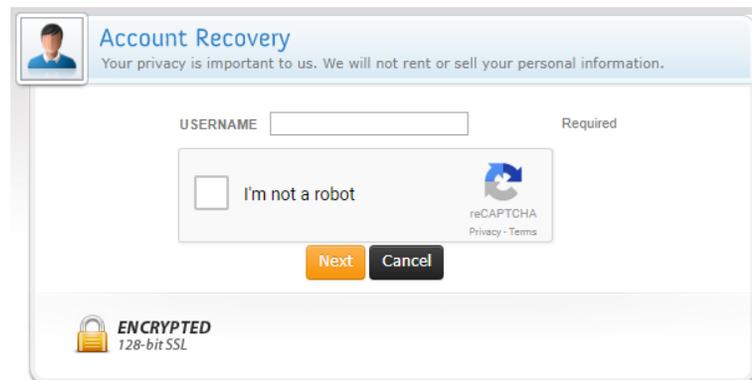
The screenshot shows the 'Global Settings' window with the 'CAPTCHA Settings' tab selected. It contains a checkbox for 'Use CAPTCHA' and two text input fields for 'reCAPTCHA Site Key' and 'reCAPTCHA Secret Key'. A note states: 'To use this you will need to obtain keys from reCAPTCHA'.

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.

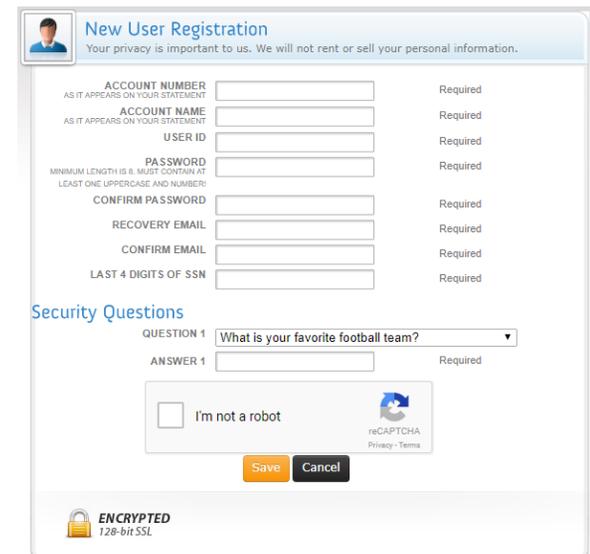


The screenshot shows the 'CAPTCHA Settings' window for a client. It has tabs for 'General', 'Password', 'Captcha', 'Multifactor Auth', and 'Hierarchy'. The 'Captcha' tab is active, showing a checkbox for 'Use Default (Overrides settings below)', a checkbox for 'Use CAPTCHA', and two text input fields for 'reCAPTCHA Public Key' and 'reCAPTCHA Private Key'. A 'Save' button is on the right.

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.



The screenshot shows the 'Account Recovery' page. It features a 'USERNAME' input field labeled 'Required', a reCAPTCHA widget with the text 'I'm not a robot', and 'Next' and 'Cancel' buttons. A security notice at the bottom reads 'ENCRYPTED 128-bit SSL'.



The screenshot shows the 'New User Registration' page. It includes a privacy notice, several required input fields: 'ACCOUNT NUMBER', 'ACCOUNT NAME', 'USER ID', 'PASSWORD', 'CONFIRM PASSWORD', 'RECOVERY EMAIL', 'CONFIRM EMAIL', and 'LAST 4 DIGITS OF SSN'. It also has a 'Security Questions' section with a dropdown for 'QUESTION 1' and an 'ANSWER 1' field, a reCAPTCHA widget, and 'Save' and 'Cancel' buttons. A security notice at the bottom reads 'ENCRYPTED 128-bit SSL'.

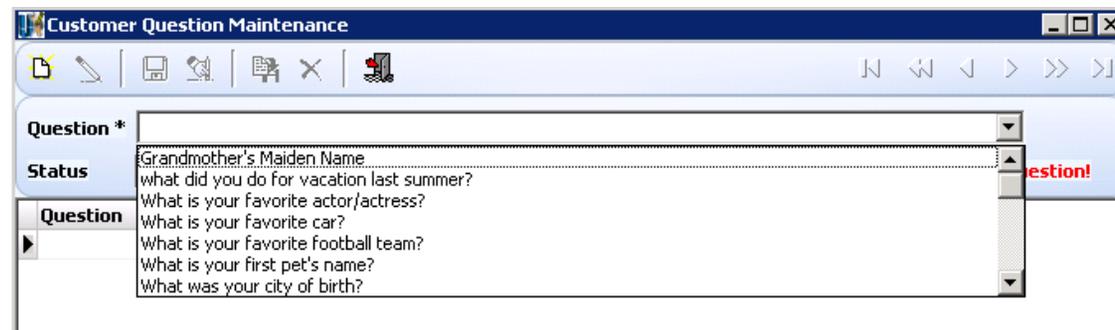
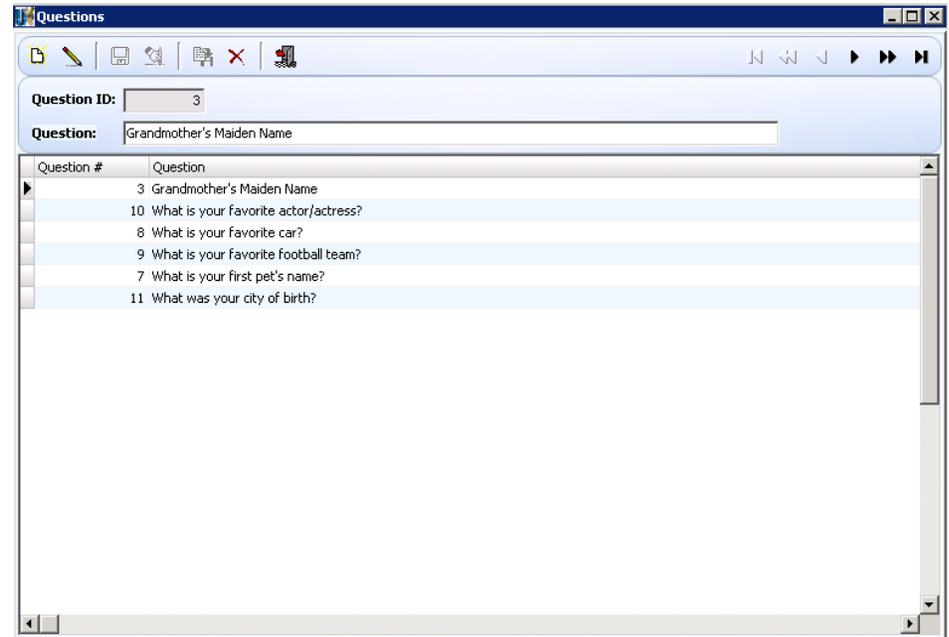
Multifactor Authentication

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 Attempts – 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 using a new browser before the days have passed, they will need to authenticate themselves for that browser.

Basic Advanced Custom Web Pages Payments Users Reports

General Password Captcha Multifactor Auth Hierarchy

Min. # Questions 0 Save Cancel

Max Attempts 3 Add/Edit Questions

Cookie Expiration 30 days

Questions (Only ACTIVE questions are shown)

- ▶ What is your grandmother's maiden name?
- What is your favorite football team?
- What was your city of birth?
- What is the meaning of life?
- What is 2 + 2?

Save

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.

The screenshot shows the 'Advanced' tab in the Uluro Web 3.0 administration interface. The 'Disclaimer' sub-tab is selected. The main content area displays the HTML code for the disclaimer, which includes a standard disclaimer and a custom disclaimer. The custom disclaimer is currently disabled. On the right side, the 'Disclaimer' settings are configured: 'Require Users to accept disclaimer by' is set to 5/4/2018, 'Enable Disclaimer' is checked, and the 'Custom Disclaimer' is not enabled. The 'Custom Link', 'Custom Link Text', and 'Custom Disclaimer Denied Link' fields are empty.

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>>

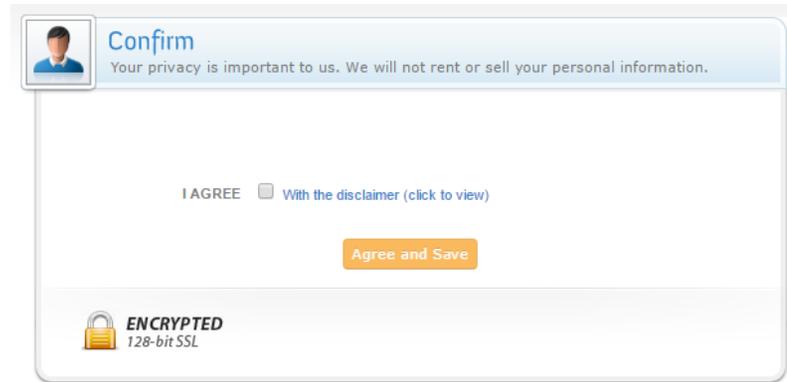
DisclaimerToken is used to identify the user session.

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:



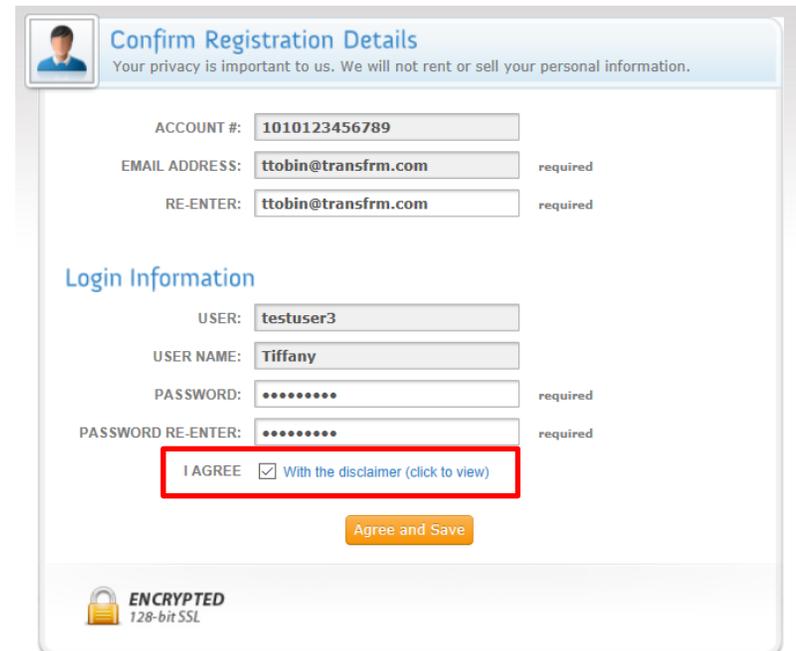
Confirm
Your privacy is important to us. We will not rent or sell your personal information.

I AGREE [With the disclaimer \(click to view\)](#)

Agree and Save

 **ENCRYPTED**
128-bit SSL

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



Confirm Registration Details
Your privacy is important to us. We will not rent or sell your personal information.

ACCOUNT #: 1010123456789

EMAIL ADDRESS: ttobin@transfrm.com required

RE-ENTER: ttobin@transfrm.com required

Login Information

USER: testuser3

USER NAME: Tiffany

PASSWORD: required

PASSWORD RE-ENTER: required

I AGREE [With the disclaimer \(click to view\)](#)

Agree and Save

 **ENCRYPTED**
128-bit SSL

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

ACCEPTED DISCLAIMER: M/d/yyyy ACCEPTED DISCLAIMER: 1/5/2018 M/d/yyyy

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 can view/edit within their profile. It also determines what fields are required for a user to enter on their profile.

The screenshot displays the 'Profile Page Settings' interface. At the top, there are navigation tabs: Basic, Advanced (highlighted with a red box), Page Setup, Payments, Users, and Reports. On the left side, there is a vertical sidebar with tabs: Other, Admin Page, Home Page, Profile Page (highlighted with a red box), and Page HTML/CSS. The main content area is divided into two columns. The left column is titled 'Allow User to set (Unchecking will hide)' and contains several checkboxes: Send Mail (checked), Send Fax (unchecked), Email URL (checked), Text Messages (checked), Email PDF (checked), and Voice Calls (checked). Below these is a 'Secure PDF' section with 'Email Secure PDF' checked and a 'Minimum # of Challenges*' set to 3. A note states: '* 0 will not require any user challenges. Only User Name and Password will be required to open the Secure PDF.' The right column is titled 'Set View/Edit Options' and lists various fields with radio button options: Address 1 (Hidden, Required, Optional), Address 2 (Hidden, Required, Optional), City (Hidden, Required, Optional), State (Hidden, Required, Optional), Postal Code (Hidden, Required, Optional), Phone # (Hidden, Required, Optional), Mobile # (Hidden, Required, Optional), Fax # (Hidden, Required, Optional), and Last 4 SSN (Hidden, Required, Optional). A 'Save' button is located in the top right corner of the main content area.

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

Profile Maintenance
User Main >> Profile Maintenance



My Profile

Your privacy is important to us. We will not share your personal information.

FULL NAME:	<input type="text" value="Tiffany Tobin"/>	required
ADDRESS 1:	<input type="text"/>	Required
ADDRESS 2:	<input type="text"/>	Optional
CITY:	<input type="text"/>	Required
STATE:	<input type="text"/>	Required
POSTAL CODE:	<input type="text"/>	Required
PHONE #:	<input type="text"/>	(###) ###-#### Required
ALLOW TEXT MESSAGE:	<input type="checkbox"/>	
ALLOW VOICE CALLS:	<input type="checkbox"/>	
MOBILE PHONE #:	<input type="text"/>	(###) ###-#### Required
FAX NUMBER:	<input type="text"/>	Optional
LAST 4 SSN:	<input type="text"/>	Your data will be encrypted Optional
PRIMARY EMAIL:	<input type="text" value="ttobin@transfrm.com"/>	
MAKE PAYMENTS:	<input checked="" type="checkbox"/>	
DELIVERY METHOD:	<input checked="" type="checkbox"/> Send Mail <input type="checkbox"/> Send Email <input type="checkbox"/> Send Fax	
UN-ENROLL:	<input type="checkbox"/>	

 **ENCRYPTED**
128-bit SSL

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

Edit Users
Admin Home >> Manage Users >> Edit Users

User Profile Management

Administrative section for editing user specific profile information.

Update User Information For: Tiffany Tobin - #1540

USERNAME: required

STATUS: ▼

USER TYPE: ▼

FULL NAME: required

PHONE #: (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: Optional

LAST 4 SSN: Your data will be encrypted Optional

PRIMARY EMAIL:

ACCEPTED DISCLAIMER: M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

ALLOW PAYMENTS:

MERCHANT ACCOUNT: ▼

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

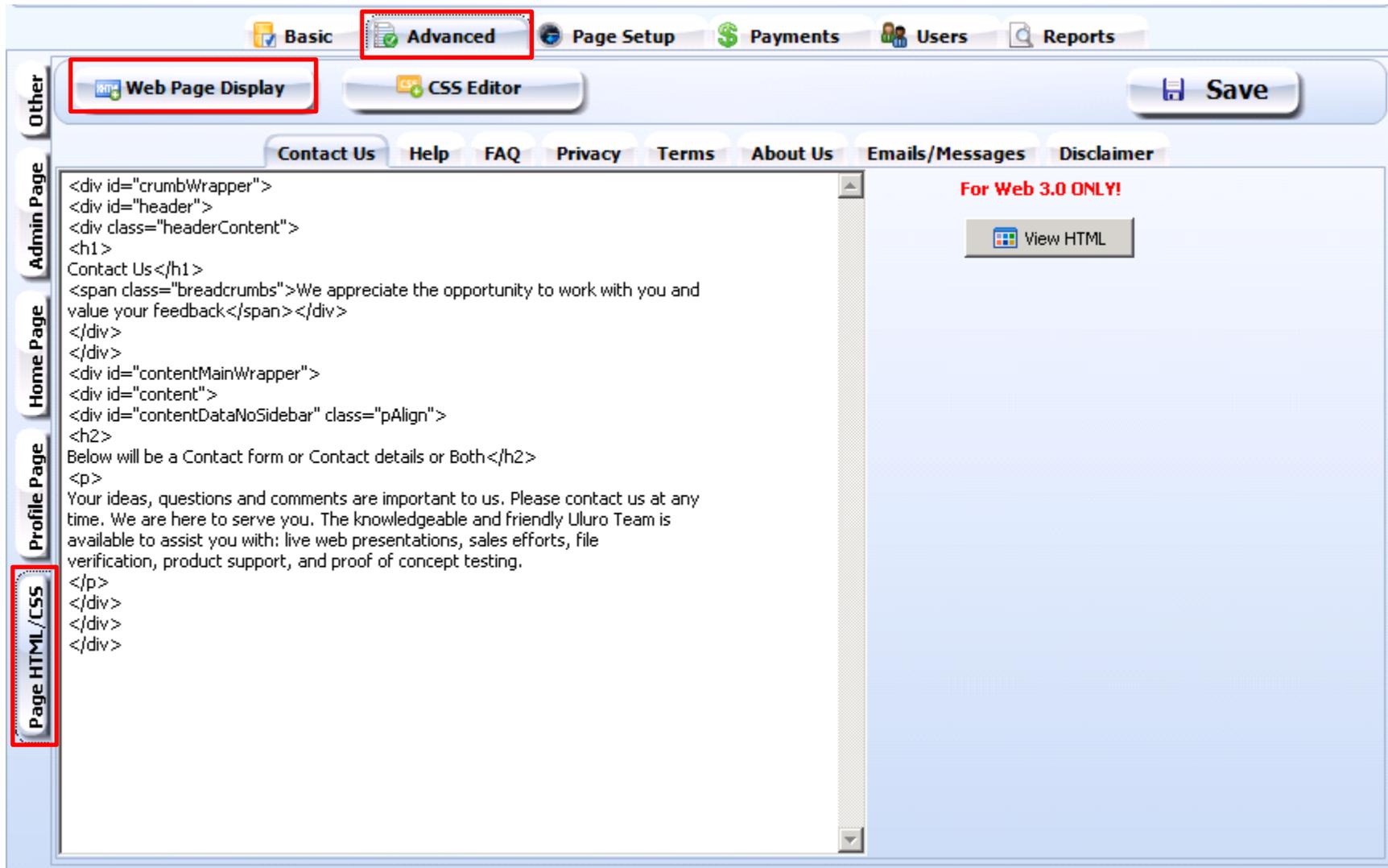
REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

 **ENCRYPTED**
128-bit SSL

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	CleanseCode	OmitReason	Sys_Addr4	Sys_Name	Transpromo2
#CREDITSAPPLIED	CUSTID	PayProc	Sys_City	Sys_Ret_addr1	Transpromo3
#PDF	DocId	PDFNAME	Sys_DocDate	Sys_Ret_Addr2	Transpromo4
#TOTALPAYMENTS	Docno	PENDPAGE	Sys_EmailAddress	Sys_Ret_Addr3	Transpromo5
AccAddr1	DueDate	PieceNo	Sys_invoice	Sys_Ret_Addr4	Transpromo6
AccAddr2	Emailed	PSTARTPAGE	Sys_MiscDate1	Sys_Ret_City	Transpromo7
AccAddr3	EmailedOn	RIPCOUNT	sys_miscDate2	Sys_Ret_Name	Transpromo8
AccAddr4	ExtEstatement	SEARCHNAME	Sys_MiscNo1	Sys_Ret_State	Transpromo9
AccCity	Faxed	SerialNo	sys_miscno2	Sys_Ret_Zip	Tray
AccCountry	FaxedOn	SUBDESC	Sys_MiscText1	SYS_SMSKEYDATE	
AccName	FaxNumber	Submid	Sys_miscText2	SYS_SMSMESSAGE	
AccState	IsCredit	Sys_Acct_ID	Sys_MiscText3	Sys_State	
AccZip	LastBlank	Sys_Addr1	Sys_MiscText4	Sys_Zip	
AllowPay	NoteEmailed	Sys_Addr2	Sys_MiscText5	Transpromo1	
BCID	NoteEmailedOn	Sys_Addr3	SYS_MOBILEPHONE	Transpromo10	

↓ Add
↑ Remove
✔ Save

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

Account #	Name	Date	Balance	Balance Due	Pay
▶					

Web Display
_ □ ×

Std User Main (3.0)
Search (3.0)
Dashboard (3.0)

#ACTIVITY	Docno	PENDPAGE	Sys_EmailAddress	Sys_Ret_Addr3	Transpromo5
AccAddr1	DueDate	PieceNo	Sys_invoice	Sys_Ret_Addr4	Transpromo6
AccAddr2	Emailed	PSTARTPAGE	Sys_MiscDate1	Sys_Ret_City	Transpromo7
AccAddr3	EmailedOn	RIPCOUNT	sys_miscDate2	Sys_Ret_Name	Transpromo8
AccAddr4	ExtEstatement	SEARCHNAME	Sys_MiscNo1	Sys_Ret_State	Transpromo9
AccCity	Faxed	SerialNo	sys_miscno2	Sys_Ret_Zip	Tray
AccCountry	FaxedOn	SUBDESC	Sys_MiscText1	SYS_SMSKEYDATE	
AccName	FaxNumber	Submid	Sys_miscText2	SYS_SMSMESSAGE	
AccState	IsCredit	Sys_Acct_ID	Sys_MiscText3	Sys_State	
AccZip	LastBlank	Sys_Addr1	Sys_MiscText4	Sys_Zip	
AllowPay	NoteEmailed	Sys_Addr2	Sys_MiscText5	Transpromo1	
BCID	NoteEmailedOn	Sys_Addr3	SYS_MOBILEPHONE	Transpromo10	
CleanseCode	OmitReason	Sys_Addr4	Sys_Name	Transpromo2	
CUSTID	PayProc	Sys_City	Sys_Ret_addr1	Transpromo3	
DocId	PDFNAME	Sys_DocDate	Sys_Ret_Addr2	Transpromo4	

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

Add

Remove

Save

Account #	Name	Date	Balance	Amount Due	Combine PDF
▶	[Redacted]				

Web Display [-] [□] [×]

Std User Main (3.0) Search (3.0) Dashboard (3.0)

BRKPACKSTAT
CLEANSEDDOCS
CreateDate
CUSTID
EXTJOBNUM
Filelocation
Filename
ReceiptType
reprint
Status
subtypeid

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

Submission Type	File Name	ID	Receive Date	Docs	Pages	Status
▶						

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.

Web Display

Custom Search (2.0) Documents (3.0)

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
#BALANCEDUE	DISPLAYNAME	PDFNAME	Sys_DocDate	Sys_Ret_addr1	Transpromo3
#CREDITSAPPLIED	DocId	PENDPAGE	Sys_EmailAddress	Sys_Ret_Addr2	Transpromo4
#TOTALPAYMENTS	DueDate	PieceNo	Sys_invoice	Sys_Ret_Addr3	Transpromo5
AccAddr1	Emailed	PSTARTPAGE	Sys_MiscDate1	Sys_Ret_Addr4	Transpromo6
AccAddr2	EmailedOn	RIPCOUNT	sys_miscDate2	Sys_Ret_City	Transpromo7
AccAddr3	ExtEstatement	SEARCHNAME	Sys_MiscNo1	Sys_Ret_Name	Transpromo8
AccAddr4	Faxed	SerialNo	sys_miscno2	Sys_Ret_State	Transpromo9
AccCity	FaxedOn	SUBDESC	Sys_MiscText1	Sys_Ret_Zip	Tray
AccCountry	FaxNumber	Submid	Sys_miscText2	SYS_SMSKEYDATE	
AccState	IsCredit	Sys_Acct_ID	Sys_miscText3	SYS_SMSMESSAGE	
AccZip	LastBlank	Sys_Addr1	Sys_MiscText4	Sys_State	
AllowPay	NoteEmailed	Sys_Addr2	Sys_MiscText5	Sys_Zip	
BCID	NoteEmailedOn	Sys_Addr3	SYS_MOBILEPHONE	Transpromo1	
CleanseCode	OmitReason	Sys_Addr4	Sys_Name	Transpromo10	
CUSTID	PayProc	Sys_City	SYS_ORGOUTPAGES*	Transpromo2	

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

Account #	Account Name	Doc ID	Document Date	Balance	Amount Due	Pay	#PDF

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 edited.

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.

Set Column Title

Field Name:	<input type="text" value="docno"/>	
Enter Column Title:	<input type="text" value="Doc ID"/>	<input type="button" value="OK"/>
Maximum # of Characters:	<input type="text" value="0"/>	Sortable: <input checked="" type="checkbox"/>



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.

#ACTIVITY	BANNER_FLAG*	DET_PRV_PROVIDER NA-FNL_TOTAL ADJUSTMENTRECORD ID*	Submid
#CREDITSAFEE	BCID	DET_PRV_PROVIDER STA-FNL_TOTAL CHARGES*	RIPCOUNT
#PDF	CleanseCode	DET_PRV_PROVIDER ZIP-FNL_TOTAL PAYER PAYMESAVE_TO_DB_FIELD*	Sys_Acct_ID
#TOTALPAYMENTS	CLIENT ID*	DocId	GENDER*
AccAddr1	CUSTID	DueDate	SEARCHNAME
AccAddr2	DET_PAT_GUARANTOR II Emailed	LastBlank	SEP_FLAG*
AccAddr3	DET_PAT_GUARANTOR N EmailedOn	NoteEmailed	SEP_PAGE*
AccAddr4	DET_PAT_MASTER PATIEIEstEstatement	NoteEmailedOn	SerialNo
AccCity	DET_PAT_PATIENT DOB+Faxed	OmitReason	STM_DYNAMIC FIELD 1*
AccCountry	DET_PAT_PATIENT NAME FaxedOn	PayProc	STM_DYNAMIC FIELD 2*
AccName	DET_PRV_PROVIDER ADDFaxNumber	PDFNAME	STM_DYNAMIC FIELD 3*
AccState	DET_PRV_PROVIDER ADDFEE AMOUNT*	PENDPAGE	STM_DYNAMIC FIELD 4*
AccZip	DET_PRV_PROVIDER CITIFEE PERCENT*	PieceNo	STM_STATEMENT ACCT N Sys_MiscNo1
AllowPay	DET_PRV_PROVIDER ID+FNL_PREVIOUSLY PAID*	PSTARTPAGE	STM_STATEMENT NUMBE Sys_MiscNo2
			STM_STATEMENT REFERE Sys_MiscText1

#ACTIVITY	CleanseCode	DET_PRV_PROVIDER ZIP-FNL_TOTAL CHARGES*	RIPCOUNT	Sys_Acct_ID
AccAddr1	CLIENT ID*	DocId	FNL_TOTAL PAYER PAYMESAVE_TO_DB_FIELD*	Sys_Acct_ID
AccAddr2	CUSTID	Docno	GENDER*	Sys_Acct_ID
AccAddr3	DET_PAT_GUARANTOR II DueDate	IsCredit	SEARCHNAME	Sys_Acct_ID
AccAddr4	DET_PAT_GUARANTOR N Emailed	LastBlank	SEP_FLAG*	Sys_Acct_ID
AccCity	DET_PAT_MASTER PATIEIEmailedOn	NoteEmailed	SEP_PAGE*	Sys_Acct_ID
AccCountry	DET_PAT_PATIENT DOB+ExtEstatement	NoteEmailedOn	SerialNo	Sys_Acct_ID
AccName	DET_PAT_PATIENT NAME Faxed	OmitReason	STM_DYNAMIC FIELD 1*	Sys_Acct_ID
AccState	DET_PRV_PROVIDER ADD FaxedOn	PayProc	STM_DYNAMIC FIELD 2*	Sys_Acct_ID
AccZip	DET_PRV_PROVIDER ADDFaxNumber	PDFNAME	STM_DYNAMIC FIELD 3*	Sys_Acct_ID
AllowPay	DET_PRV_PROVIDER CITIFEE AMOUNT*	PENDPAGE	STM_DYNAMIC FIELD 4*	Sys_Acct_ID
BCID	DET_PRV_PROVIDER ID+FEE PERCENT*	PieceNo	STM_STATEMENT ACCT N Sys_MiscDate1	Sys_Acct_ID
	BANNER_FLAG*	DET_PRV_PROVIDER NA-FNL_PREVIOUSLY PAID*	PSTARTPAGE	Sys_Acct_ID
	DET_PRV_PROVIDER STA-FNL_TOTAL ADJUSTMENTRECORD ID*	Submid	STM_STATEMENT REFERE Sys_MiscNo1	Sys_Acct_ID
			STM_STATEMENT NUMBE Sys_MiscNo2	Sys_Acct_ID
			STM_STATEMENT REFERE Sys_MiscText1	Sys_Acct_ID

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.

Web Display

Custom Search (2.0) Documents (3.0)

#ACTIVITY	CleanseCode	NoteEmailed	Sys_Acct_ID	Sys_MiscText3	SYS_SMSMESSAGE
#BALANCEDUE	CUSTID	NoteEmailedOn	Sys_Addr1	Sys_MiscText4	Sys_State
#CREDITSAPPLIED	DISPLAYNAME	OmitReason	Sys_Addr2	Sys_MiscText5	Sys_Zip
#PDF	DocId	PayProc	Sys_Addr3	SYS_MOBILEPHONE	Transpromo1
#TOTALPAYMENTS	DueDate	PDFNAME	Sys_Addr4	Sys_Name	Transpromo10
AccAddr1	Emailed	PENDPAGE	Sys_City	SYS_ORGOUTPAGES*	Transpromo2
AccAddr2	EmailedOn	PieceNo	Sys_DocDate	Sys_Ret_addr1	Transpromo3
AccAddr3	ExtEstatement	PSTARTPAGE	Sys_EmailAddress	Sys_Ret_Addr2	Transpromo4
AccAddr4	Faxed	RIPCOUNT	Sys_invoice	Sys_Ret_Addr3	Transpromo5
AccCity	FaxedOn	SAVE_TO_DB_FIELD*	Sys_MiscDate1	Sys_Ret_Addr4	Transpromo6
AccCountry	FaxNumber	SEARCHNAME	sys_miscDate2	Sys_Ret_City	Transpromo7
AccState	FEE AMOUNT*	SEP_PAGE*	Sys_MiscNo1	Sys_Ret_Name	Transpromo8
AccZip	FEE PERCENT*	SerialNo	sys_miscno2	Sys_Ret_State	Transpromo9
AllowPay	IsCredit	SUBDESC	Sys_MiscText1	Sys_Ret_Zip	Tray
BCID	LastBlank	Submid	Sys_miscText2	SYS_SMSKEYDATE	weight

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

Account...	Account Na...	Doc ...	Document Da...	Balan...	Amount D...	P...	GENDE...

User Type Maintenance

Admin Home >> User Type Maintenance

User Type Security

Click any row to view and edit details.

WEB PAGE	PAGE TYPE	VIEW	SUBMIT
ACH or Check Payments Report	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACH/Check Details Report	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add New User	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approve Campaign	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Dashboard	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Dashboard Details	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Edit History	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Manager Reports	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Preview	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Print Results Import	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Snapshot Review	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign User	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Wizard	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Combine PDFs	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Confirm	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Credits Applied Summary	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Activity Log	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Document Area	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Event Documents	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

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

The screenshot displays the Uluro web application interface. At the top left is the Uluro logo. At the top right, the user is identified as 'Administrator' with links for 'My Profile' and 'Sign Out', and a user profile picture. Below the header, there are navigation tabs for 'Transformations' and 'Google'. The main content area is titled 'Document Activity Log' with a breadcrumb trail: 'Admin Home >> View Dashboard >> View Document List >> Document Activity Log'. Underneath, there is a 'Document Data' section with a table of account information:

Account #	Account Name	Document Date	Balance	Amount Due	SAVE_TO_DB_FIELD*
1010123456789	Tiffany Tobin	2/9/2018	\$480.65	9.81	This is a save to DB field

Below this is an 'Additional Information' section with a table of address and delivery details:

Supplied Address	Cleansed Address	Delivery Method	Email Delivered To
Tiffany Tobin 68 Phythian street Bradfordsville, KY 40009			ttobin@transfrm.com

The 'Event Log' section features a search bar and a table of events:

Event	TimeStamp	Notes
Text Sent	2/14/2018 9:31:04 AM	Message Sent
Document PDF Created	2/14/2018 9:30:40 AM	PDF Created by End_user_1
Document Viewed	2/14/2018 9:30:37 AM	Document viewed by End_user_1
Text Sent	2/14/2018 9:30:15 AM	Message Sent
Text Sent	2/9/2018 3:33:06 PM	Message Sent
Document Received	2/9/2018 3:31:01 PM	Received

At the bottom right of the event log table, there are navigation controls: '<<', '<', '1 of 1', '>', and '>>'.

Banking Workflow

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>.

Ty...	Start Date	End Date	URL	Stat...
C	11/1/2000	11/1/2050	http://bankingdemo.uluro.com/handlers/streamcheckimages.a	A
S	2/1/2000	2/1/2050	\\documentprocessing\getstatementpdf.asp	A

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, Acctype, routeno.

External Archive Retrieval

Archive Type: Check Statement Active

Start Date: 2/1/2000 End Date: 2/1/2050

URL: \documentprocessing\getstatementpdf.asp

Static Parameters (At least 1 must be entered)

They can be separated by a comma or a return. database=1

Dynamic Parameters (At least 1 must be entered)

They can be separated by a comma or a return. Account=<#Account>,CreateDate=<#createdate>,Address=<#accAddr1>

Ty...	Start Date	End Date	URL	Stat...
C	11/1/2000	11/1/2050	http://bankingdemo.uluro.com/handlers/streamcheckimages.a	A
S	2/1/2000	2/1/2050	\documentprocessing\getstatementpdf.asp	A

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.

User Type Maintenance
Admin Home >> User Type Maintenance

Edit User Account Type Management

Administrative section for editing user specific profile information.

Update Profile For: Standard Users - #UR

USER TYPE ID: required

DESCRIPTION: required

SYSTEM ADMIN: Admin (except campaign manager)

LANDING PAGE: required

DISABLE PDF: Disable PDF Viewing

ENCRYPTED
128-bit SSL

Add New User Account Type
Add additional user types and set page level security

View User Account Types
View the list of user account types and select one to edit

Submission Management

Submission Management

Filter Results:

Documents	Account	Nickname
BankingWorkflowDemo	40000143	

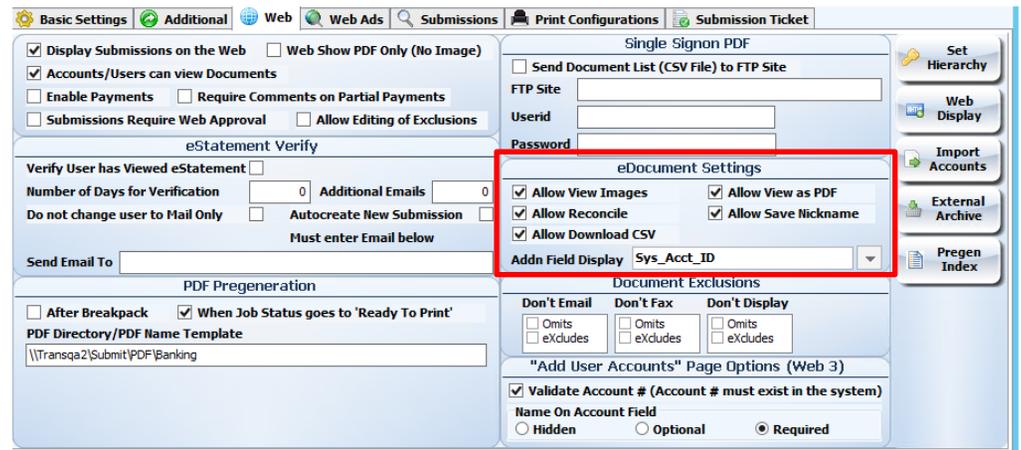
The account is the user's account number.

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.

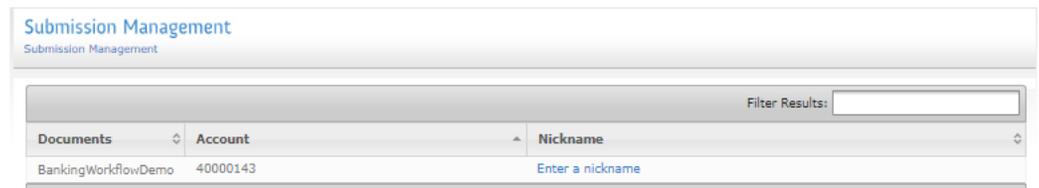
Allow Download CSV – This will display the Download as CSV button. If clicked, the data fields setup in the map for the CSV file will be downloaded as a CSV file.



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 [View as PDF](#) [Enter a nickname](#) [Save Nickname](#) buttons, the nickname will be displayed under 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.

End_user_1
My Profile | Sign Out

Image Processing
Submission Management >> Image Processing

View Images Reconcile 2/12/2018 40000143 Download as CSV View as PDF BankingWorkflowDemo Save Nickname
2/12/2018 40000143
12/11/2017 40000143

Total Pages: 3

Trans Credit Union
200 SEABOARD LN

Member FDIC

Customer Number: 40000143
Statement Period: 08/19/2017 To 09/18/2017

Checking Account Number: 154004318

Account Summary

Previous Balance	\$726.70	Average Balance	\$1126.39
Number of Credits	4	Minimum Balance	\$258.25
Total Credits	\$3772.07	Average Collected Balance	\$1126.39
Number of Debits	54		
Total Debits	\$3744.84		
New Balance	\$753.93		

Checks (19 In Order)

No.	Date	Amount	No.	Date	Amount	No.	Date	Amount
3405	Aug 24, 2017	\$49.95	3409	* Aug 22, 2017	\$47.34	3410	Aug 25, 2017	\$53.78
3411	Aug 22, 2017	\$115.02	3412	Sep 05, 2017	\$16.60	3413	Sep 07, 2017	\$156.79
3414	Sep 07, 2017	\$270.00	3417	* Sep 01, 2017	\$38.70	3418	Sep 07, 2017	\$50.00
3419	Aug 28, 2017	\$28.00	3420	Aug 28, 2017	\$4.50	3421	Sep 10, 2017	\$156.79
3422	Sep 09, 2017	\$53.78	3423	Sep 07, 2017	\$220.00	3424	Sep 07, 2017	\$11.30
3425	Sep 07, 2017	\$48.09	3427	* Sep 07, 2017	\$881.45	3428	Sep 07, 2017	\$188.65
3431	* Sep 17, 2017	\$16.60						

Other Debits

Show Accounts with Documents Only

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

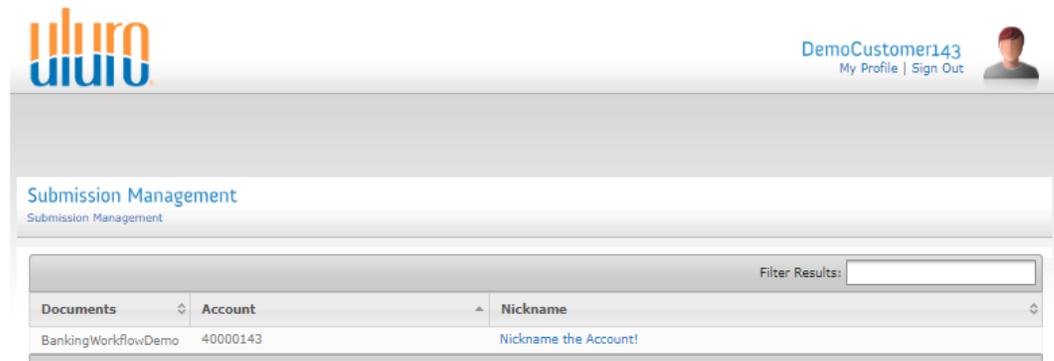
This can be enabled/disabled within the client's web setup.

The screenshot shows the 'Admin Page' settings for 'Other' in the Uluro Web 3.0 interface. The 'Advanced' tab is selected. The 'Show Accounts with Documents ONLY' checkbox is checked and highlighted with a red box. Other settings include 'Disable IFrame Display' (checked), 'Enable Responsive Pages (Mobile)' (unchecked), and 'Mask Account Number' (unchecked). A 'PDF Hash Key' field and a 'Save' button are also visible.

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 or 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 Transaction Images List
 Submission Management >> Image Processing >> View Transaction Images List

Image Size: **Large** | Checks | Sort By: **Number** | Order: **Up**

Rows: **3** | Columns: **2**

Show Both Sides

<p>3405 Date: 2/18/2019 Pay to the Order of: James Smith \$ 49.95 forty nine dollars and ninety five cents. 564849001 11200555 3405</p>	<p>3409 Date: 2/18/2019 Pay to the Order of: James Smith \$ 47.34 forty seven dollars and thirty four cents. 564849001 11200562 3409</p>
<p>3410 Date: 2/18/2019 Pay to the Order of: James Smith \$ 53.78 fifty three dollars and seventy eight cents. 564849001 11200568 3410</p>	<p>3411 Date: 2/18/2019 Pay to the Order of: James Smith \$ 115.02 one hundred and fifteen dollars and two cents. 564849001 11200556 3411</p>
<p>3412 Date: 2/18/2019 Pay to the Order of: James Smith \$ 16.80 sixteen dollars and sixty cents. 564849001 11200563 3412</p>	<p>3413 Date: 2/18/2019 Pay to the Order of: James Smith \$ 158.79 one hundred and fifty six dollars and seventy nine cents. 564849001 11200568 3413</p>

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.

Reconcile
 Submission Management >> Image Processing >> Reconcile

Opening Balance	Withdrawals	Deposits	Balance
Opening Balance: \$726.70	-Cleared Checks: (\$3,744.84) -Uncleared Checks: \$0.00	+Statement Deposits: \$3,772.07 +Uncleared Deposits: \$0.00	=Actual Balance: \$753.93 Balance: \$753.93

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

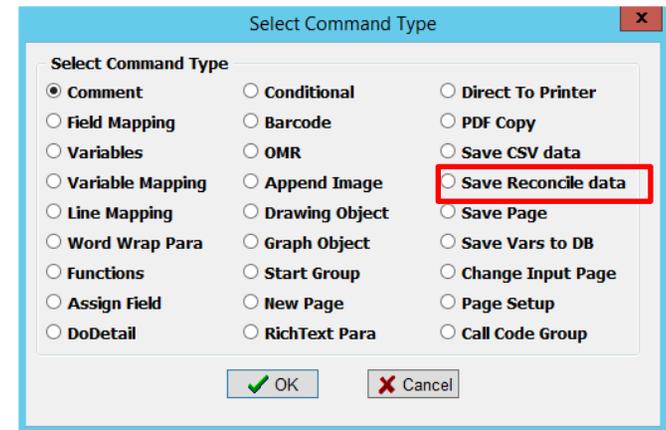
Adjustment

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.



Save Reconcile Data

Trans Type: Beginning Balance

Enter the Variable for each required component

Account Type:	ACCTTYPE	Account Description
Transaction #:	RECONCILE DESC	
Posting Date:	STATEMENT PERIOD START	
Amount:	SUMMARY PREVIOUS BALANCE	

Amounts should be Negative for debits and positive for Credits

Save Reconcile Data

Trans Type: Ending Balance

Enter the Variable for each required component

Account Type:	ACCTTYPE	Account Description
Transaction #:	RECONCILE DESC	
Posting Date:	STATEMENT PERIOD END	
Amount:	SUMMARY CURRENT BALANCE	

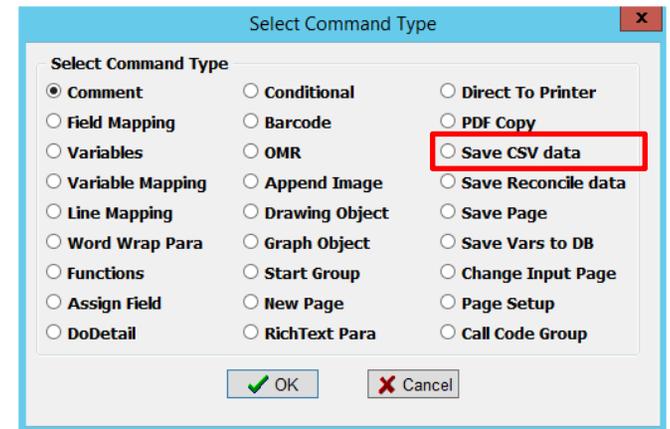
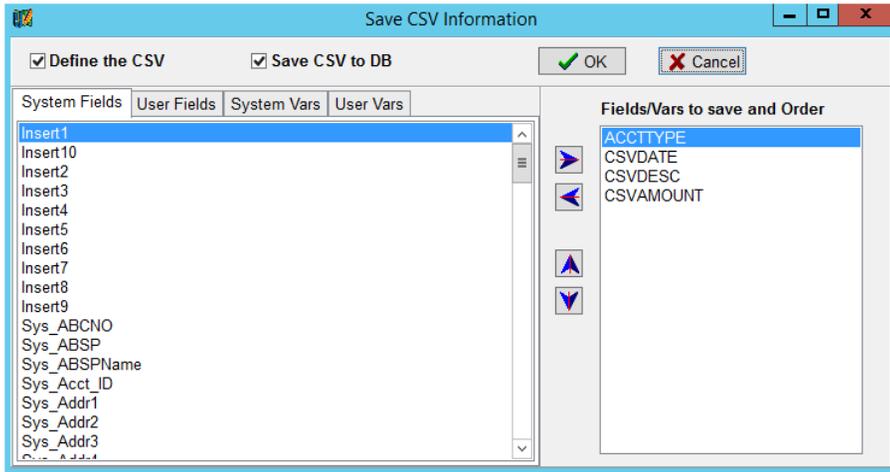
Amounts should be Negative for debits and positive for Credits

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.

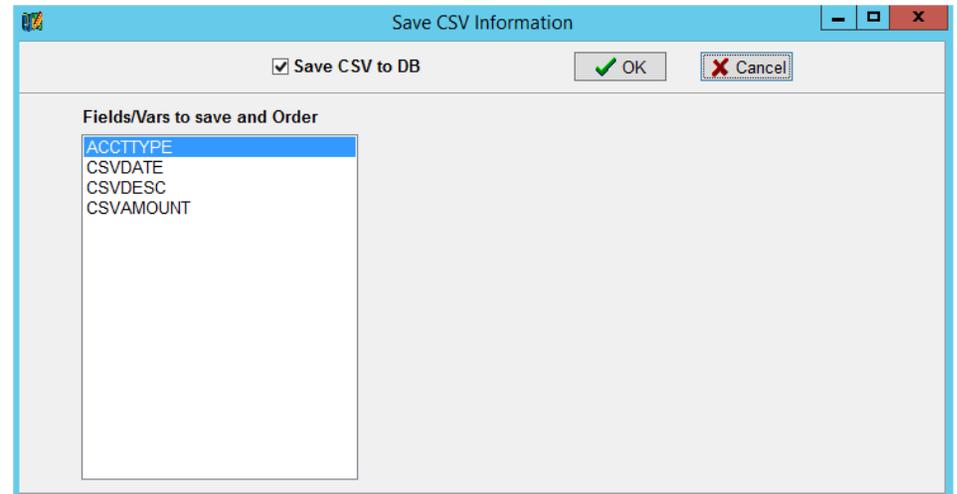
Select the Fields and Variables by using the arrows to move them to the Right window:



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
7	Checking	8/25/2017	Check 3410	52.78



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

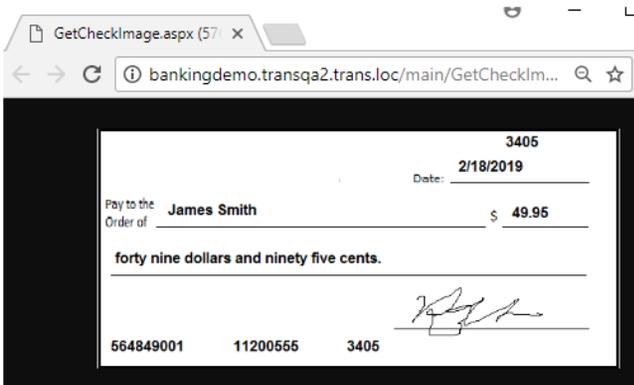


Image Processing
Submission Management >> Image Processing

View Images | Reconcile | 2/12/2018 40000143 | Download as CSV | View as PDF | Enter a nickname | Save Nickname

Navigation: << [1] 2 3 >> Go

Total Pages: 3

Trans Credit Union
200 SEABOARD LN
DEMO CUSTOMER 143
200 SEABOARD LN

Member FDIC

Customer Number
40000143

Statement Period
08/19/2017 To 09/18/2017

Checking Account Number: 154004318

Account Summary

Previous Balance	\$726.70	Average Balance	\$1126.39
Number of Credits	4	Minimum Balance	\$258.25
Total Credits	\$3772.07	Average Collected Balance	\$1126.39
Number of Debits	54		
Total Debits	\$3744.84		
New Balance	\$753.93		

Checks (19 In Order)

No.	Date	Amount	No.	Date	Amount	No.	Date	Amount
3400	Aug 24, 2017	\$49.95	3409	* Aug 22, 2017	\$47.34	3410	Aug 25, 2017	\$53.78
3401	Aug 22, 2017	\$115.02	3412	Sep 09, 2017	\$16.60	3413	Sep 07, 2017	\$156.79
3402	Sep 07, 2017	\$270.00	3417	* Sep 01, 2017	\$38.70	3418	Sep 07, 2017	\$50.00
3403	Aug 28, 2017	\$28.80	3420	Aug 28, 2017	\$4.50	3421	Sep 10, 2017	\$156.79
3422	Sep 09, 2017	\$53.78	3423	Sep 07, 2017	\$220.00	3424	Sep 07, 2017	\$11.30
3425	Sep 07, 2017	\$48.69	3427	* Sep 07, 2017	\$881.45	3428	Sep 07, 2017	\$188.65
3431	* Sep 17, 2017	\$16.60						

Admin/CSR User Experience

Upload Files (Web FTP)

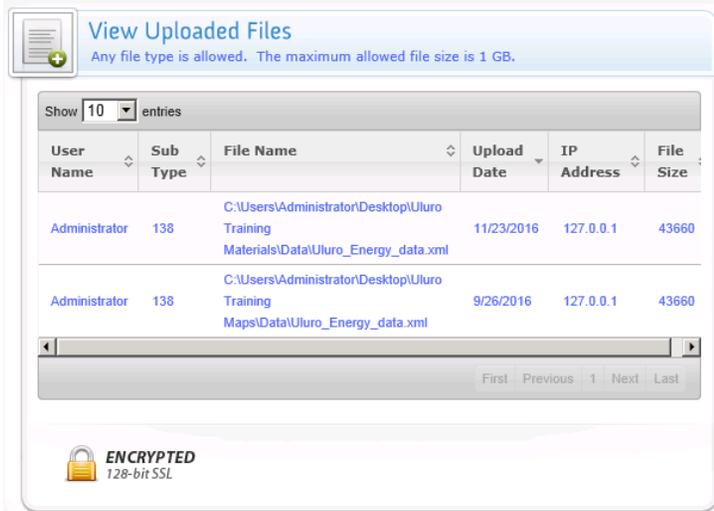
For an admin user to be able to upload a data file for a Submission type, the Web directory for that submission type must be filled in and enabled by checking the box under the File Receipt tab in the submission type.



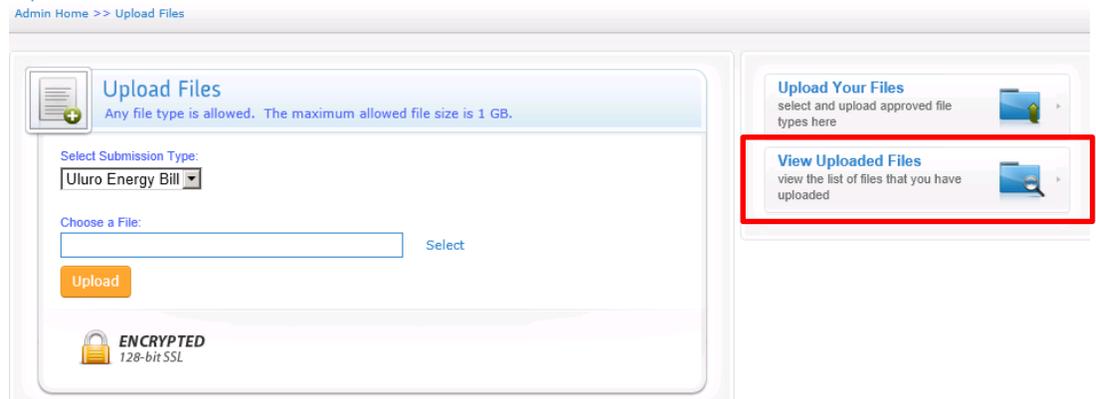
Each submission type must have a unique Web directory location that begins with \\server\Submit\Web\.

Once the file has been uploaded, it will go to this web directory 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.



Upload Files



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 chosen, click Upload.

The user can see their uploads 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.

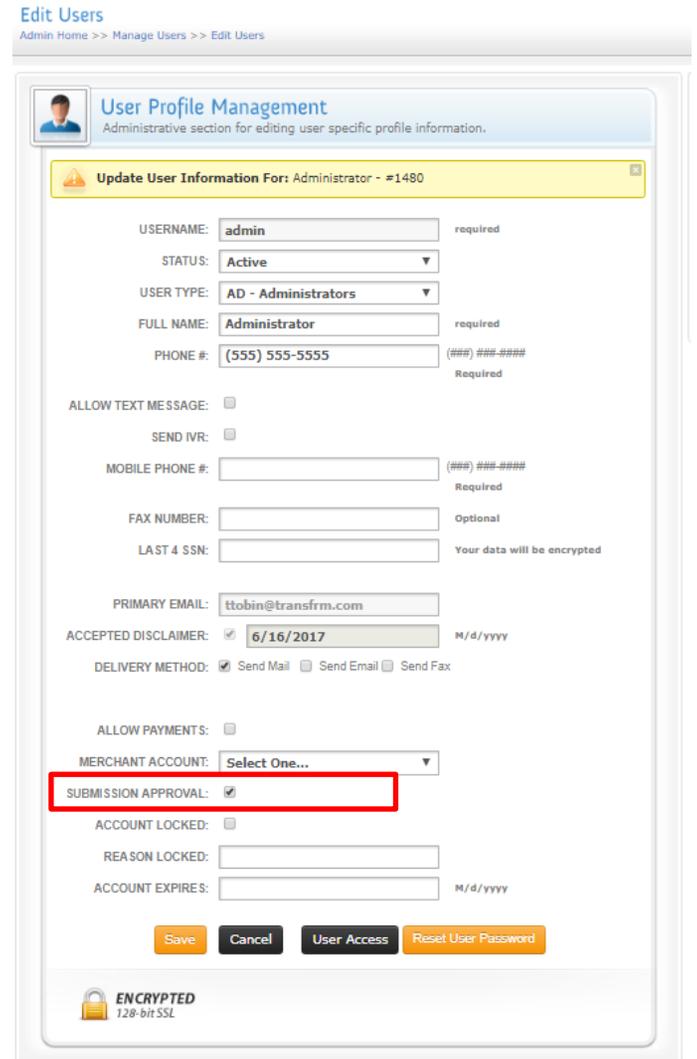
Allow Editing of Exclusions – If this is checked, then the Mail Type column will have a dropdown list of the exclusion options. This allows the admin user the ability to manually change documents to be excluded as No Mail, Exclude, or Omit.

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.



The screenshot shows a navigation bar with tabs: Basic Settings, Additional, Web, Web Ads, and Submissions. Below the tabs are several settings:

- Display Submissions on the Web
- Web Show PDF Only (No Image)
- Accounts/Users can view Documents
- Enable Payments
- Require Comments on Partial Payments
- Submissions Require Web Approval
- Allow Editing of Exclusions



The screenshot shows the 'Edit Users' section, specifically 'User Profile Management' for 'Administrator - #1480'. The 'SUBMISSION APPROVAL' checkbox is highlighted with a red box and is checked.

Update User Information For: Administrator - #1480

USERNAME: admin required

STATUS: Active

USER TYPE: AD - Administrators

FULL NAME: Administrator required

PHONE #: (555) 555-5555 (###) ###-#### Required

ALLOW TEXT MESSAGE:

SEND IVR:

MOBILE PHONE #: (###) ###-#### Required

FAX NUMBER: Optional

LAST 4 SSN: Your data will be encrypted

PRIMARY EMAIL: ttobin@transfrm.com

ACCEPTED DISCLAIMER: 6/16/2017 M/d/yyyy

DELIVERY METHOD: Send Mail Send Email Send Fax

ALLOW PAYMENTS:

MERCHANT ACCOUNT: Select One...

SUBMISSION APPROVAL:

ACCOUNT LOCKED:

REASON LOCKED:

ACCOUNT EXPIRES: M/d/yyyy

Buttons: Save, Cancel, User Access, Reset User Password

ENCRIPTED 128-bit SSL

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.

Document Exclusions		
Don't Email	Don't Fax	Don't Display
<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes	<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes	<input type="checkbox"/> Omits <input type="checkbox"/> eXcludes

Don't Display will 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 regardless 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 screenshot shows the Uluro web interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with a user profile icon and links for "My Profile" and "Sign Out". Below the header, there are tabs for "Transformations" and "Google". The main content area is titled "Web Proofing" with a breadcrumb "Admin Home >> Web Proofing". Below this is a search bar with "Look For: Status", "Which: equals", and "Awaiting Approval". There are "Search" and "Reset" buttons, and pagination controls showing "1". Below the search bar is a table with columns: Sub Type, File Name, ID, Receive Date, # Docs, # Pages, and Status. The first row of data is highlighted with a red box around the "Sub Type" column, which contains a document icon. The data for this row is: Uluro_Energy, Uluro_Energy_data.xml, 1434, 2/7/2018, 21, 21, Awaiting Approval.

Sub Type	File Name	ID	Receive Date	# Docs	# Pages	Status	
	Uluro_Energy	Uluro_Energy_data.xml	1434	2/7/2018	21	21	Awaiting Approval

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.

The screenshot shows the Uluro web application interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with links for "My Profile" and "Sign Out", and a user profile picture. Below the header, there are tabs for "Transformations" and "Google". The main content area is titled "View Document List" with a breadcrumb trail: "Admin Home >> Web Proofing >> View Document List".

Below the title, there is a summary row for a submission:

Submission Type	File Name	ID	Receive Date	# Docs	# Pages	Status	Approve	Reject	Reset All
Uluro_Energy	Uluro_Energy_data.xml	1434	2/7/2018	21	21	Awaiting Approval			

Below this, there are search filters:

Reports: **Choose from report list** ▼

Look For: [] Which: **equals** [] [Search] [Reset]

Look For: [] Which: **equals** []

Show Credits Show Zero Balance

The main table has a "Filter Results:" input field at the top right. The table columns are: Account #, Account Name, Doc ID, Document Date, Balance, Amount Due, GENDER*, and Mail Type. The table contains 11 rows of data. The second row (Mike Gibson) has a dropdown menu for "Mail Type" open, showing options: "No Mail" (highlighted in blue), "Exclude", and "Omit".

	Account #	Account Name	Doc ID	Document Date	Balance	Amount Due	GENDER*	Mail Type
Activity Log	1010123456789	Tiffany Tobin	1	2/7/2018	\$195.99	195.99	FEMALE	▼
Activity Log	8676209	Mike Gibson	20	2/7/2018	\$402.26	402.26	MALE	No Mail ▼
Activity Log	8657422	Don Smith	19	2/7/2018	\$102.26	102.26	MALE	Exclude ▼
Activity Log	6789857	Josh Tidwell	18	2/7/2018	\$195.99	195.99	MALE	No Mail ▼
Activity Log	4568422	Bob Davis	15	2/7/2018	\$102.26	102.26	MALE	Omit ▼
Activity Log	4340982	Lane Smith	14	2/7/2018	\$102.26	102.26	MALE	▼
Activity Log	2385632	Grath Brookes	10	2/7/2018	\$195.99	195.99	MALE	▼
Activity Log	2385300	Henry Ford	9	2/7/2018	\$121.27	121.27	MALE	▼
Activity Log	2345135	Walter Willis	8	2/7/2018	\$121.27	121.27	MALE	▼
Activity Log	1511228	Scott Boyte	4	2/7/2018	\$0.00	0.00	MALE	Omit ▼
Activity Log	975632	Steven King	21	2/7/2018	\$4.85	4.85	MALE	Omit ▼

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 submission or you can resubmit from uControl.

Confirm your Approval

Name of approver: (required)

Reason for Rejecting

Enter a reason: (required)

If you double click on a submission in 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 Information	
Sub ID:	1434 Status: Print Manager
Type:	Uluro_Energy
Customer:	Uluro Training
Billing ID	12345
Received:	2/7/2018 11:06:58 AM Via: FTP
Map:	Uluro Training\Uluro Energy.nmp
Docs:	21 Cleansed: 4 Pages: 21
File Dir:	\\TransQa2\Submit\
File Name:	20180123083500839U_Energy
Orig File:	Uluro_Energy_data.xml
MD5 Sum:	EA7A0E69CBCB81681F286A72513DC07B
PS Jobid:	1007 Job Status: Print Manager
Form:	Standard 24 lb paper blank
Approved:	<input checked="" type="checkbox"/> Date: 2/7/2018 11:43:2 By: admin
Reason:	Tiffany

Submission Information	
Sub ID:	1435 Status: Rejected
Type:	Uluro_Energy
Customer:	Uluro Training
Billing ID	12345
Received:	2/7/2018 11:43:30 AM Via: FTP
Map:	Uluro Training\Uluro Energy.nmp
Docs:	21 Cleansed: 0 Pages: 21
File Dir:	\\TransQa2\Submit\
File Name:	20180123083500839U_Energy
Orig File:	Uluro_Energy_data.xml
MD5 Sum:	EA7A0E69CBCB81681F286A72513DC07B
PS Jobid:	None Job Status:
Form:	Standard 24 lb paper blank
Approved:	<input type="checkbox"/> Date: 2/7/2018 11:46:0 By: admin
Reason:	There is a problem with the output

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.

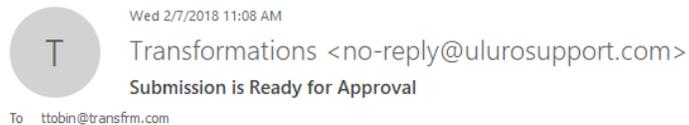
Subject – Enter the text that will be displayed as the subject line of the email.

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 of 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:



Uluro Training

Submission:
Uluro_Energy
1434

Email Events Setup

Event: Submission is Ready for Approval

To Email Addresses: ttobin@transfrm.com

Subject: Submission is Ready for Approval

Body: #CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#

HTML

View HTML

Add Tag: Add

Event Type	Subject
Daily Schedule	Daily Schedule
Presort Job Reports	Presort Job Reports
Presort Submission Reports	Presort Submission Reports
Send End User PDF Email	Send End User PDF Email
Send End User URL Email	Send End User URL Email
Submission is in Error Status	Submission is in Error Status
Submission is Ready for Approval	Submission is Ready for Approval
Submission is Ready for Job Select	Submission is Ready for Job Select
Submission is Received	Submission is Received
Submission Ready for Print	Submission Ready for Print
Submission Rejected	Submission Rejected
Report Group	Report Group
Submission Is Complete	Submission is Complete

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 of 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:



Uluro Training

Submission:
Uluro_Energy
1435

Email Events Setup

Event: Submission Rejected

To Email Addresses: ttobin@transfrm.com

Subject: Submission Rejected

Body: #CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#

HTML

View HTML

Add Tag: Add

- #CUSTID#
- #CUSTNAME#
- #SUBID#
- #SUBNAME#
- #SUBMID#
- #ORGFILNAME#
- #SYS_DOCDATE#

Event Type	Subject
Daily Schedule	Daily Schedule
Presort Job Reports	Presort Job Reports
Presort Submission Reports	Presort Submission Reports
Send End User PDF Email	Send End User PDF Email
Send End User URL Email	Send End User URL Email
Submission is in Error Status	Submission is in Error Status
Submission is Ready for Approval	Submission is Ready for Approval
Submission is Ready for Job Select	Submission is Ready for Job Select
Submission is Received	Submission is Received
Submission Ready for Print	Submission Ready for Print
Submission Rejected	Submission Rejected
Report Group	Report Group
Submission Is Complete	Submission is Complete

Dashboard

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

The screenshot shows the Uluro Web 3.0 Dashboard. At the top left is the Uluro logo. At the top right, it says "Administrator" with a profile picture and links for "My Profile" and "Sign Out". Below the header is a "View Dashboard" link and a breadcrumb "Admin Home >> View Dashboard". A search bar is present with "Look For:" and "Which: equals" dropdowns, and "Search" and "Reset" buttons. A pagination bar shows "1 of 3" with navigation arrows. The main content is a table of submissions with columns: Submission Type, File Name, ID, Receive Date, Docs, Pages, and Status. The first row is highlighted with a red box. A "Filter Results:" input field is at the top right of the table.

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.



View Document List

[Admin Home](#) >> [View Dashboard](#) >> [View Document List](#)

Submission Type	File Name	ID	Receive Date	# Docs	# Pages	Status
Water Past Due	UluroWater_Data.PDF	1671	7/27/2017	100	100	Print Manager

Reports:

Look For: Which:

Look For: Which:

Show Credits Show Zero Balance

Filter Results:

	Account #	Account Name	Doc ID	Document Date	Balance
	1010123456789	Ms Tiffany Tobin	1	7/27/2017	\$230.00
	987544	Mrs Renea Osbourne	12	7/27/2017	\$368.00
	941236	Mr Tyler Kepley	16	7/27/2017	\$304.00
	869852	Mr Louis Pasteur	8	7/27/2017	\$317.00
	847555	Mr Nikola Tesla	24	7/27/2017	\$295.00
	657388	Mr Harry Madison	5	7/27/2017	\$364.00
	608408	Mrs Maria Grainger	2	7/27/2017	\$384.00
	584799	Mr Jordan Turner	19	7/27/2017	\$408.00
	542187	Mrs Aiesha Tyler	20	7/27/2017	\$308.00
	412536	Mr Bill Nye	9	7/27/2017	\$381.00

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.



Administrator
My Profile | Sign Out



Search Records

[Admin Home](#) >> [Search Records](#)

+ Advanced Search

Combine Pdf

Look For: **Name** Which **equals** **Tiffany Tobin** **Search** **Reset**

Show Credits Show Zero Balance

Filter Results:

	Account #	Name	Date	Balance	Amount Due	Combine PDF
						<input type="checkbox"/>
	1010123456789	Tiffany Tobin	02/01/2017	\$1,965.85	1965.8500	<input type="checkbox"/>
	1010123456789	Tiffany Tobin	02/01/2017	\$1,965.85	1965.8500	<input type="checkbox"/>
	1010123456789	Tiffany Tobin	07/27/2017	\$480.65	480.6500	<input type="checkbox"/>
	1010123456789	Tiffany Tobin	07/27/2017	\$195.99	195.9900	<input type="checkbox"/>
	1010123456789	Tiffany Tobin	02/01/2016	\$1,965.85	1965.8500	<input type="checkbox"/>
	1010123456789	Tiffany Tobin	02/01/2016	\$1,965.85	1965.8500	<input type="checkbox"/>

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.

The screenshot displays the 'Web Setup' window for a client named 'Uluro Training' with CLID 122 and an 'Active' status. The 'Advanced' tab is selected, and the 'Parent Customer (for use with Parent/Child)' checkbox is checked and highlighted with a red box. Other settings include 'Web URL Name' (uluro.training.com), 'Web Database' (uluro_web30), 'Web Logo File*' (UluroTrainingSite\UluroLogo.png), and 'Web CSS File**' (Default_122.css). The 'Web Logout URL' is empty. The 'Web Logo Additional Settings' section includes a description 'Whatever we want!', a hyperlink 'uluro.com', and the 'Open in a new page when clicked' checkbox checked. The 'General' sub-tab is active, showing options for 'Enable Opt In Popup Box' (unchecked), 'Default Delivery Type for New Users' (Mail selected), 'Default Email Type for New Users' (URL selected), and 'Enable Payments for New Users' (checked). A 'New Password/Registration Verification' button is visible. The interface includes a 'Save' button at the top right and another 'Save' button at the bottom right.

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.

The screenshot displays the 'Advanced' configuration tab for a child site. At the top, there are navigation tabs: 'Basic', 'Advanced' (highlighted with a red box), 'Page Setup', 'Payments', 'Users', and 'Reports'. Below these, the 'Child Customer' dropdown is set to 'Uluro Training Customer 3', and the 'View As User Type' dropdown is set to 'Administrators'. Action buttons for '+ Add', '- Edit', 'Save', 'Cancel Edits', and 'Delete' are visible. A checkbox for 'Use Parent CSS' is currently unchecked. A table below shows the configuration for the selected child customer:

Child Customer	User Type	Use Parent C...
Uluro Training Customer 3	Administrators	<input type="checkbox"/>

On the left side, a vertical navigation menu includes 'Other', 'Admin Page', 'Home Page', 'Profile Page', 'Page HTML/CSS', and 'Parent/Child' (highlighted with a red box).

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.

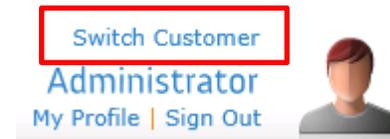
The Possible Companies will list all children that were added under the Advanced tab> Parent/Child. Select the companies to view as children and move them to the Managed Companies column. Click Update Companies for the change to take effect.

UserType Subsidiaries Managed

Admin Home >> User Type Maintenance >> UserType Subsidiaries Managed

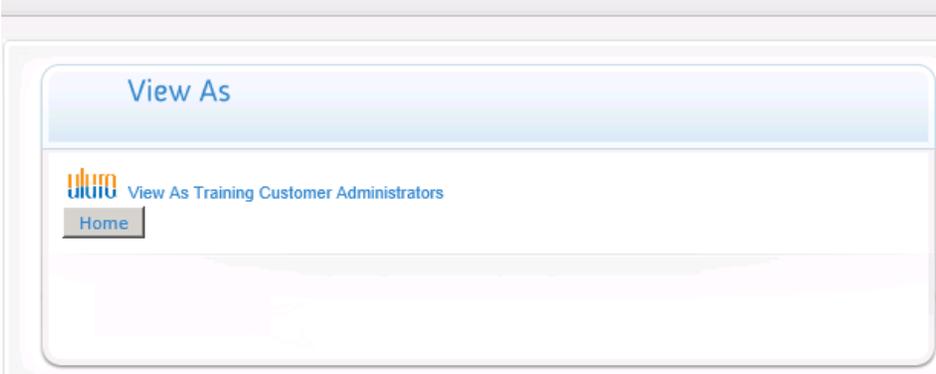
Go to the admin home page and you'll see the ability to view child sites in the top right.

Click on Switch Customer to view a child site.



View as customer

[Admin Home](#) >> [View as customer](#)



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.

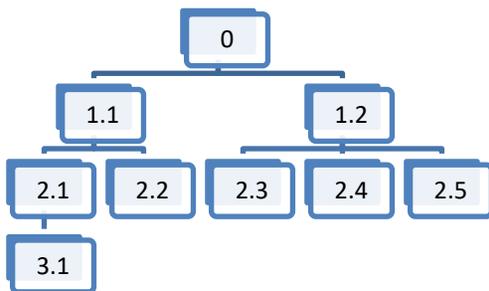


Tips from Transformations:

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.

The screenshot shows the 'Hierarchy' configuration page. At the top, there are tabs for 'Basic', 'Advanced', 'Page Setup', 'Payments', 'Users', and 'Reports'. Below these are sub-tabs for 'General', 'Password', 'Captcha', 'Multifactor Auth', and 'Hierarchy'. A 'Save' button is on the right. The main content area has a header: 'Hierarchies apply to ALL customers using the current web database'. Below this are two columns: 'Current Hierarchy' and 'Hierarchy Name to Add'. The 'Current Hierarchy' column has two rows: 'Level 0' with a dropdown set to '0' and 'Level 1' with an empty dropdown. The 'Hierarchy Name to Add' column has two empty text input fields. A plus (+) button is next to each dropdown. A dropdown menu is open under 'Level 1', showing options '1.1' and '1.2'.

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 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.

ACCOUNT EXPIRES: M/d/yyyy

Save

Cancel

User Access

Reset User Password



ENCRYPTED
128-bit SSL

Set User Access

Admin Home >> Manage Users >> Edit Users >> Set User Access

tree

User Access Management

Administrative section for editing user Access information.

Update Access For: enduser1 - #1487

ACCESS LEVEL 1:

ACCESS LEVEL 2:

ACCESS LEVEL 3:

Save Cancel

ACCESS
0

ENCRYPTED
128-bit SSL

Assign a Submission Type a Hierarchy Level

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

The screenshot shows the Uluro Web 3.0 interface for a submission type. At the top, there are fields for Customer (Uluro Training Customer 2), CLID (132), Anything You Want, and Customer Status (ACTIVE). Below this, there are fields for Submission Type (* UEnergy), Status (Active), ID (157), and Last Modified (7/18/2017 1:24:17 PM). A 'Sub Type Report' button and a 'Current ONLY' checkbox are also present. The main navigation bar includes 'Basic Settings', 'Additional', 'Web', 'Web Ads', 'Submissions', 'Print Configurations', and 'Submission Ticket'. The 'Web' tab is selected, and the 'Set Hierarchy' button is highlighted with a red box. Other buttons include 'Web Display'. The left sidebar contains several checked options: 'Display Submissions on the Web', 'Accounts/Users can view Documents', 'Enable Payments', 'Submissions Require Web Approval', and 'Allow Editing of Exclusions'. There are also unchecked options: 'Web Show PDF Only (No Image)', 'Require Comments on Partial Payments', and 'Send Document List (CSV File) to FTP Site'. Below these are fields for 'FTP Site', 'Userid', and 'Password'.

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.

The screenshot shows the 'Web Access' dialog box. At the top, it says 'Current Level that this Submission Type can be viewed.' Below this is a large empty text area. To the right of this area are 'Delete' and 'Add' buttons. Below the text area are four dropdown menus labeled 'Level 0', 'Level 1', 'Level 2', and 'Level 3'. The 'Level 2' dropdown is currently set to '2.2'. At the bottom of the dialog is a 'Save' button with a green checkmark icon.

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.

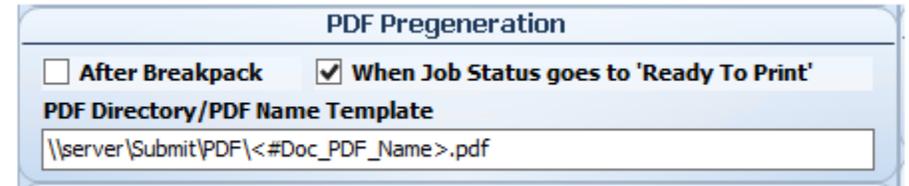
After Breakpack – This will generate the PDF of the document directly after Breakpack, prior to Cleanse or Presort.

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.



PDF Pregeneration

After Breakpack When Job Status goes to 'Ready To Print'

PDF Directory/PDF Name Template

\\server\Submit\PDF\<#Doc_PDF_Name>.pdf

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.

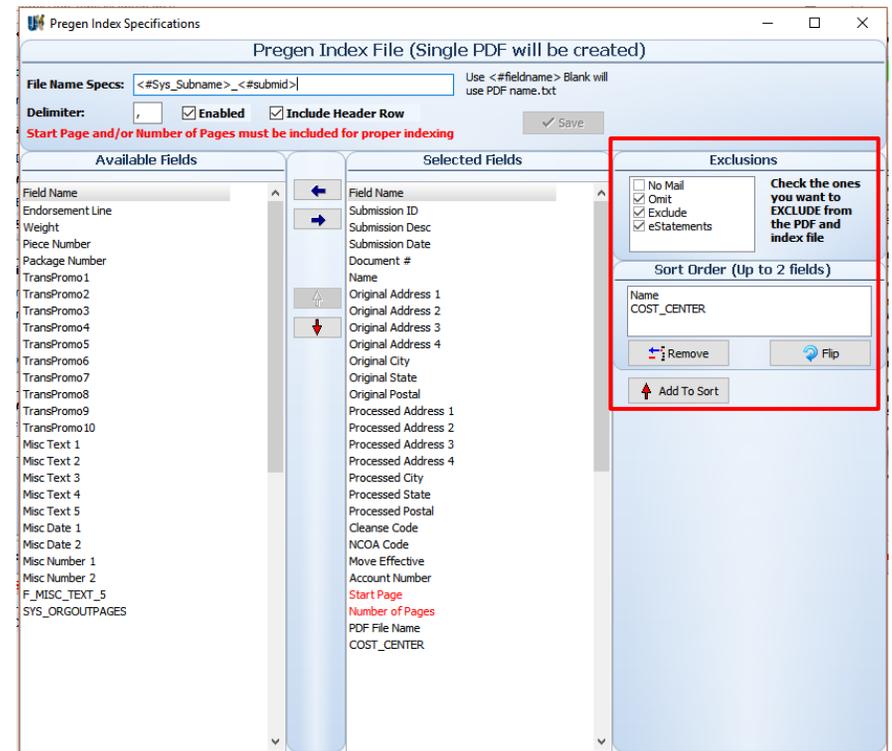
The screenshot shows the 'Submission Type Maintenance' window for 'Uluro Training'. The 'PDF Pregeneration' section is highlighted with a red box and contains the following options:

- After Breakpack
- When Job Status goes to 'Ready To Print'
- PDF Directory/PDF Name Template: `\\Transqa2\SUBMIT\PDF\Training\<#submid>\Gas.pdf`

The 'Pregen Index' button in the right-hand sidebar is also highlighted with a red box.

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
```

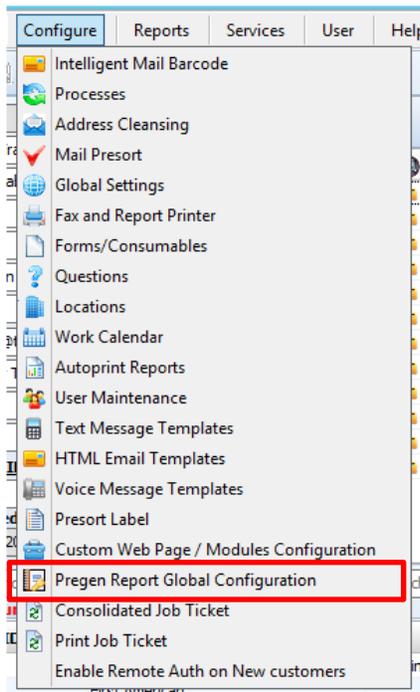
Pregen Report Configuration

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.

This screenshot shows the 'Pregen Report Configuration' form. The form includes several tabs: 'Basic Settings', 'Additional', 'Web', 'Web Ads', 'Submissions', 'Print Configurations', and 'Submission Ticket'. The 'Basic Settings' tab is active, showing fields for 'Description *' (Uluro_Gas), 'Cleanse Type', 'Presort Type', 'Preprocess Program' (Training\SUCCESS.bat \$FPATH \$FILE), 'Postprocess Program', and 'Map Name' (Uluro Training\Uluro Gas.nmp). There are also checkboxes for 'Automatically Create a Job' and 'Auto Print the Submission Ticket', and a 'Submission Priority' dropdown set to '5 Days'. On the right side, there is a vertical toolbar with buttons for 'Report Grouping', 'Service Level Agrmt', 'Multi-File PP Map', 'Pregen Report Config' (highlighted with a red box), and 'Custom Status'. An 'Open Map' button is also present.

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.



This screenshot shows the 'uSetup Main' screen. On the left, there is a client information form for 'Uluro Training' (CLID 61, Status ACTIVE). The form includes fields for 'Address 1' (200 Seaboard Ln), 'City, ST Post' (Franklin, TN, 37067), 'Country', 'Email' (ttobin@transfrm.com), 'Contact' (Tiffany Tobin), 'Phone', 'Fax', 'Billing ID' (12345), and 'Date' (Created: 10/25/2017 2:26:02 PM, Updated: 12/8/2017 3:52:26 PM). On the right, there is a 'Submission Types' table with columns 'Sub ID' and 'Description'. The table lists various submission types, with 'U_Gas' (Uluro_Gas) highlighted. On the far right, there is a 'Web Setup' toolbar with buttons for 'Notes', 'Contracts', 'Email Setup', 'Contacts', 'Text Msg Setup', 'Voice Msg Setup', 'Map Template Values', and 'Pregen Report Config' (highlighted with a red box).

Sub ID	Description
BankTrust	UluroBank&Trust
Imposition	Imposition_B&T
TCU	TransCreditUnion
Template_A	Template_A
U_Biz_Card	Uluro_Business_Card_n_up
U_Comm	Uluro_Communications
U_Credit	Uluro_Credit
U_Energy	Uluro_Energy
U_Gas	Uluro_Gas
U_Health	Uluro_Health
U_Postcard	Uluro_Postcard_4_up
U_Water	Uluro_Water

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 Pregon 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.

Submission Transactions

Submission Information

Sub ID: 1544 Status: Print Manager
 Type: TransCreditUnion
 Customer: Uluro Training
 Billing ID: 12345
 Received: 2/28/2018 4:19:45 PM Via: FTP
 Map: Uluro Training\TransCreditUnion.nmp
 Docs: 110 Cleansed: 4 Pages: 394
 File Dir: \\TransQa2\Submit\
 File Name: 20180214093117870TCU
 Orig File: TransCreditUnion_Data.txt
 MDS Sum: C475899D49CBDEA7766D705CB5EEC8AB
 PS Jobid: 1092 Job Status: Print Manager
 Form: Standard 24 lb paper blank
 Approved: Date: By:
 Reason:

Exclusions

*	eState=N	eState=Y	Total
▶ Non-Excluded	109	1	110
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	109	1	110

Transactions Reports Emails Text Messages HTML Emails Voice Messages uSecure Print Jobs Consumables Submission Flow

Open Report Open All Regenerate Report

Report	Report Date	Emailed	Location	Auto Gen
Change Address CSV	2/28/2018 4:23:29 P	N	\\TransQa2\Submit\rpt\	N
Bad Address CSV	2/28/2018 4:23:29 P	N	\\TransQa2\Submit\rpt\	N
Presort Document CSV	2/28/2018 4:23:29 P	N	\\TransQa2\Submit\rpt\	N
Return Address Summary	2/28/2018 4:23:29 P	N	\\TransQa2\Submit\rpt\	N
Satori Move Summary	2/28/2018 4:20:06 P	N	\\TransQa2\Submit\rpt\	Y
Submission Email Report	2/28/2018 4:23:29 P	N	\\TransQa2\Submit\rpt\	N
▶ PreGenReport_UluroTraining	2/28/2018 4:24:14 P		\\TransQa2\Submit\rpt\	Y

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

Job Details

Job ID: 1092 | Status: Print Manager | Presort Type: Trans LM | Job Date: 02/28/2018 | Merged: | # Unprinted: 1 | Location: Nashville

Submissions | Print Jobs | Reports | Transactions | Mail.dat Zip File | Consumables

Open Report | Open All | Regenerate Report

Submid	Report	Report Date	Emailed	Location	Auto Gen
	Satori Mail Sort Listing	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori Manifest Report	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori Postage Summary	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori Presort Report	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori Tray Labels	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori USPS Qualification	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
	Satori Zip Code Listing	2/28/2018 4:21:04 PM	N	\\TransQa2\Submit\rpt\	Y
1544	Bad Address CSV	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Change Address CSV	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Itemized Submission Report	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	PreGenReport_UluroTraining	2/28/2018 4:24:14 PM	N	\\TransQa2\Submit\rpt\	Y
1544	Presort Document CSV	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Return Address Summary	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Satori CASS 3553	2/28/2018 4:20:06 PM	N	\\TransQa2\Submit\rpt\	Y
1544	Satori Move Summary	2/28/2018 4:20:06 PM	N	\\TransQa2\Submit\rpt\	Y
1544	Submission Breakdown Report	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Submission Detail Report	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N
1544	Submission Email Report	2/28/2018 4:23:29 PM	N	\\TransQa2\Submit\rpt\	N

Merge Type: # Merged Docs: # Orig Docs: # Orig Pages: # Orig Paper: # Unprinted: Refresh

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

Jobs | Printer Jobs

Find Job ID #: Ready for Printing only Max Jobs to display: 50 Location: <ALL>

Create Print Job | Mark Complete | Cancel Job

Filter By: Customer: <ALL> Sub Type: <ALL> Refresh

Job ID #	Created	Ext Jobname	Location	Status	Customer	Sub Type	Merge by	# Docs	Max sheets	# Before Merging	# Mer
1099	3/1/2018 11:34:00 AM		Nashville	Print Manager	Uluro Training	Uluro_Health	Not Merged	21	3		21
1098	2/28/2018 4:27:00 PM		Nashville	Print Manager	Uluro Training	Uluro_Gas	Not Merged	6	2		6
1097	2/28/2018 4:26:00 PM		Nashville	Print Manager	Uluro Training	Uluro_Health	Not Merged	21	3		21
1096	2/28/2018 4:25:00 PM		Nashville	Print Manager	Uluro Training	Uluro_Water	Not Merged	100	1		100
1095	2/28/2018 4:25:00 PM		Nashville	Print Manager	Uluro Training	Uluro_Energy	Not Merged	21	1		21
1094	2/28/2018 4:24:00 PM		Nashville	Print Manager	Uluro Training	Uluro_Communications	Not Merged	100	4		100
1093	2/28/2018 4:24:00 PM		Nashville	Print Manager	Uluro Training	UluroBank&Trust	Not Merged	9	3		9
1092	2/28/2018 4:21:00 PM		Nashville	Print Manager	Uluro Training	TransCreditUnion	Not Merged	110	3		110
1091	2/28/2018 11:01:00 AM		Nashville	Print Manager	uCampaign	uC_nup testing biz card	Not Merged	19	1		19
1089	2/27/2018 10:31:00 AM		Nashville	Print Manager	uCampaign	uC_nup testing biz card	Not Merged	19	1		19
1087	2/27/2018 9:34:00 AM		Nashville	Print Manager	uCampaign	uC_nup testing biz card	Not Merged	19	1		19
1086	2/27/2018 9:29:00 AM		Nashville	Print Manager	uCampaign	uC_nup testing biz card	Not Merged	19	1		19
1085	2/27/2018 9:22:00 AM		Nashville	Print Manager	uCampaign	uC_nup testing biz card	Not Merged	19	3		19
1084	2/26/2018 1:36:00 PM		Nashville	Print Complete	Uluro Training	Imposition_B&T	Not Merged	9	3		9

Resubmit Submission | Extract Emails | Ready To Print | Canceled | Error | Complete

Submissions | Print Jobs | Reports | Mail.dat Zip File

Print Selected | Print All | Preview | Select All

Report Name	File
Itemized Submission Report	RPT000000001544.ISR.PDF
Job Presort Document CSV	RPT000000001092.jpd.csv
Manifest Report	RPT000000001092.JMAN.PDF
PreGenReport_UluroTraining	TEST1544.TXT
Presort Document CSV	RPT000000001544.PD.CSV
Return Address Summary	RPT000000001544.rtrrpt.pdf

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.

The screenshot shows the 'Pregen Details' dialog box. On the left, there is a list of fields with checkboxes, all of which are checked. At the bottom of this list is an 'Add Selected Fields' button. The right pane shows configuration options for the selected field, 'DocId'. The 'Field Name' is 'DocId', 'Field Prefix' is empty, 'Field Suffix' is empty, 'Field Order' is 1, 'Field Length (-1 = max)' is -1, 'Field Format' is empty, and 'Field Trim' is set to a dropdown menu. A tip box explains that 'Use comma for CSV. Use [tab] for tab.' and provides examples: 'Example - %8.2f would convert 123.456 to 123.45.' and '%.9d would convert 123 to 00000123.'. At the bottom right are 'Delete', 'Cancel', and 'Save' buttons. A table at the bottom of the dialog lists all fields with their configuration details.

Name	Prefix	Suffix	Order	Length	Format	Trim
DocId			1	-1		
Submid			2	-1		
Docno			3	-1		
pagecnt			4	-1		
DocStart			5	-1		
DocEnd			6	-1		
InpPages			7	-1		
CreateDate			8	-1		
Account			9	-1		
AccName			10	-1		
AccAddr1			11	-1		
AccAddr2			12	-1		
AccAddr3			13	-1		
AccAddr4			14	-1		
AccCity			15	-1		

Printing and Emailing Pregen Reports

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.

Email Events Setup

Event: Report Group

To Email Addresses: ttobin@transfrm.com

Subject: Report Group

Body: #CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#

Report Group: Pregen Report Group

Event Type	Subject
Breakpack Reports	Breakpack Reports
Cleansing Reports	Cleansing Reports
Daily Schedule	Daily Schedule
Presort Job Reports	Presort Job Reports
Presort Submission Reports	Presort Submission Reports
Report Group	Report Group
Send End User PDF Email	Send End User PDF Email
Send End User URL Email	Send End User URL Email
Submission Is Complete	Submission Is Complete
Submission is in Error Status	Submission is in Error Status
Submission is Ready for Approval	Submission is Ready for Approval
Submission is Ready for Job Select	Submission is Ready for Job Select
Submission is Received	Submission is Received

Submission Type Report Grouping

Report Grouping

Description: Pregen Report Group

Check to Enable

Output Type: Print ONLY Email ONLY Both

Printer: [Empty]

Selecting a printer will override the global printer

Grouped Reports (Double-click for properties): PreGenReport_UluroTraining

Available Reports: Report, Bad Address CSV, Bad Address Report, CASS 3553, Change Address CSV, Health, Health_Pregen, Itemized Submission Report, Job Ticket, NCOA Move Report, PreGenReport_UCampaign, Presort Document CSV, Return Address Summary, Satori CASS 3553, Satori Move Summary, Submission Billing Report, Submission Breakdown Report, Submission Detail Report, Submission Email Report, TemplateA

Reports

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

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

Samples:

[Billing Report](#)

Billing Report

Customer:

Month: Year:

Report

Detail

Summary By Submission

Summary by Submission Type

Print

File Name:

Delimiter

; (semicolon) | (pipe) <tab>

, (comma) ~ (tilde)

Save as Delimited

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			143657	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	10.10123455789	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

Alternate Billing Report

Basic Advanced Page Setup Payments Users Rep

Select Report: Alternate Billing

Alternate Billing CSV

Customer
 Current All

Submid:

Start Date: 03/01/2017 Break on Department*

End Date: 04/21/2017 Bill To First Department ONLY

File Name: C:\Users\Administrator\Desktop\alternate billing

```
"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","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"
```

Basic Advanced Page Setup Payments Users Reports

Select Report: Multi-Channel Delivery

Multi-Channel Delivery Report

Customer
 Current All

Sub Type:

Submid:

Start Date: 11/21/2016

End Date: 11/21/2016

File Name: ...

Delimiter
 ,(comma) |(pipe) <tab>
 ;(semicolon) ~(tilde)

Print

Save as Delimited

Multi-Channel Delivery Report

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

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

Basic Advanced Page Setup Payments Users Reports

Select Report: **Authorize.Net Settlement**

Authorize.Net Settlement Report

Start Date: 11/21/2016

End Date: 11/21/2016

File Name:

[Save as CSV](#)

```
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,"settledSuccessfully":
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","LP5HCO","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: **Submission Production Summary** ▼

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

Start Date (mm/yyyy) End Date (mm/yyyy) Type **ALL** ▼

◀ ▶ |◀ ◀ 1 of 1 ▶▶ | Export to the selected format ▼ Export   

Submission Production Report

Date Range 5/1/2017 6/1/2017

Submission Type	Description	Sets	Images
163	CreditMap	12	12
162	UluroGas	48	48
152	UluroWater	1000	1000
Total Submissions		1060	1060

5/15/2017 3:04:52 PM

1

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) End Date (mm/yyyy)

of 1

 Export to the selected format ▼

Multi-Channel Delivery Report

Account #/Name	Sub ID	Sub Type Name	Subm ID	# SMS	# HTML	# IVR	IVR Calls					
							<= 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

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) End Date (mm/yyyy) [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

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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	Views
	November	Viewed	Views	October	Viewed	Views	September	Viewed	Views	August	Viewed	Views	July	Viewed	Views	June	Viewed	Views
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

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View & Print Reports

Admin Home >> View & Print Reports

Reports: **Employee Activity Summary** ▼

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

Start Date (mm/yyyy) End Date (mm/yyyy)

1 of 1 | Export

Employee Activity Summary

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

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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) End Date (mm/yyyy)

Navigation icons: Home, Back, Forward, Page 1 of 1, Export to the selected format, Export, Refresh, Print, and Print with Selection.

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

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View & Print Reports

Admin Home >> View & Print Reports

Reports: **Disclosure Unacceptance**

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

Start Date (mm/yyyy) End Date (mm/yyyy)

of 1

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	

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View & Print Reports

Admin Home >> View & Print Reports

Reports: **Revert Report**

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

Start Date (mm/yyyy) End Date (mm/yyyy)

of 1

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

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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)

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 Export to the selected format

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

Admin Home >> View & Print Reports

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)

of 1

 Export to the selected format

Billing Summary Sub

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

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View & Print Reports

Admin Home >> View & Print Reports

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)

Navigation icons: Home, Back, Forward, Page 1 of 1, Export to the selected format, Export, Refresh, Print, and another icon.

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

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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 available within this dropdown list.

The screenshot shows the Uluro web application interface. At the top left is the Uluro logo. At the top right, it says "Administrator" with a user profile icon and links for "My Profile" and "Sign Out". Below the header, there are tabs for "Transformations" and "Google". The main content area is titled "View Document List" with a breadcrumb trail: "Admin Home >> View Dashboard >> View Document List".

A table displays document information:

Submission Type	File Name	ID	Receive Date	# Docs	# Pages	Status
TransCreditUnion	TransCreditUnion_Data.txt	1544	2/28/2018	110	394	Print Manager

Below the table, there is a "Reports:" dropdown menu with the following options:

- Choose from report list
- Bad Address CSV
- Bad Address Report
- Change Address CSV
- Itemized Submission Report
- PreGenReport_UluroTraining
- Presort Document CSV
- Return Address Summary
- Satori CASS 3553
- Satori Move Summary
- Submission Breakdown Report
- Submission Detail Report
- Submission Email Report

There are also search and filter options:

- "Look For" dropdowns with "Search" and "Reset" buttons.
- A "Filter Results:" input field.

At the bottom, there is another table with columns: Account #, Account Name, Doc ID, Document Date, Balance, and Amount Due.

Account #	Account Name	Doc ID	Document Date	Balance	Amount Due
579-3	Ms Britney Alfred	25	2/28/2018	\$0.00	0.00
570-2	Mr Zane Alexis	24	2/28/2018	\$0.00	0.00
569-4	Ms Keeley Alexandre Padre	23	2/28/2018	\$0.00	0.00
558-7	Mr Keshawn Alexander	22	2/28/2018	\$0.00	0.00
539-7	Mr Kellen Alexander	21	2/28/2018	\$0.00	0.00

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 is 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 exist 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 Uluro 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.