
This document represents a high level overview of the enhancements released to Access Online on March 25, 2017. This information includes the specific changes and the impact on users.

Password complexity requirements have changed for increased security
- New password lengths: 12 – 99 characters, previous requirement was 8 – 20
- Helpful info icons have been added to all areas that allow password changes
- New password requirements enforced on next scheduled password change for the user
- Password must:
  - Be a minimum of 12 characters
  - Have one uppercase letter
  - Have one lowercase letter
  - Have one number
  - Have one special character
  - Not contain user name or user ID

Password expiration duration and notifications
- Setting to control password expiration for client relationship between 30-90 days
  - Previously between 1-60 days
  - Default will be set to 60 days
- Early notification of password expiration
  - User will be notified 15 days prior to password expiration
  - Option to ignore prompt or change it at that time
Self-service password reset

- Users can now reset their password without having to call customer service. Users in an Active and Password Failed Status can reset their password by using the new two-factor authentication functionality via the “Forgot your password” link.
  - User prompted to answer authentication question
  - User receives secondary authentication code via email – enter this into system to verify identity

- Each code is only active for 20 minutes
- Only one code is active at a time
- If “Send me another code” is clicked while the old code is still active, the previous code is deactivated
- If a user attempts this process 3 times unsuccessfully they are put into a “Failed Self Service” status
  - This can only be reset by an admin
• If a user enters the incorrect password 3 times, user is put into a “Password Failed” status and receives an email.

• All user IDs will now need to have an email address on file – a requirement for two-factor authentication.
  o User IDs without an email address on file will be prompted to provide one. This is now required and the user will not be able to skip this function.

New User ID statuses
• Inactive Status is now divided into more descriptive statuses to help identify why the user is no longer active:
  o Admin Locked* - An SA/PA has disabled the user’s ID
  o Password Failed - User has entered an invalid password 3 or more times
  o Failed Self Service - The user has entered an invalid Authentication question or Authentication code 3 or more times

  *Admin Locked is the only “inactive” equivalent status available to be manually selected in the User Access Status dropdown.

o New statuses available for selection in the User List reporting and Flex Data reporting
  o Administration > System User List report can be scheduled
    • System User List – Summary Report contains numbers for total user ID’s in each new status
**Functional Entitlement UI**

- The Functional Entitlement select list has been redesigned
  - The user can select multiple Functional Entitlement Groups
  - Search by FEG name to find specific values
  - Check the boxes in front of the FEG to add it to the list assigned to the user
  - Click the X in front of FEG to remove it from the Selected Groups

**Custom Default Hierarchy**

- If multiple Processing and/or Reporting hierarchies are assigned to a user, then he/she can select a default/favorite to be utilized throughout the system when performing a search or filtering data in a report
  - This functionality is available to all Access Online users that have more than one Processing Hierarchy or Reporting Hierarchy assigned to their User ID and is applied in:
    - Reporting and Flex Data Reporting
    - Account Profile
    - Payment Plus - Payment Instructions
    - Payment Plus - Payment Requests
    - Order Management – Search Order List
    - Transaction Management – Card Account List & Managing Account List

**Additional Search Criteria**

- Optional 1 and 2 fields are now available in the search criteria
  - Many clients assign individual identifiers to cardholders that are unique to their own company and enter this information in the Optional 1 or Optional 2 fields (configurable at the relationship level - Employee ID and Password values in Canada). These fields are now available for selection in the filter criteria used when searching for accounts.

**Dispute Related Email Notifications**

- A cardholder user can now choose to be notified via email regarding disputes (turned off by default)
  - An option has been added to receive notification for any status change in a dispute that has been filed on an account.
- Available for activation within My Personal Information > Email Notification
  - Types of emails sent:
    - to the cardholder when a dispute is created
    - to the cardholder when they cancel the dispute before it is resolved
    - to the cardholder when the dispute is found in their favor
    - to the cardholder when the dispute is found in favor of the merchant
  - A planned future release will include functionality allowing the PA to utilize Event Driven Notifications to monitor dispute status for accounts tied to them.
Schedule an Update for Account Status

- The ability to schedule an update is available for many fields within Access Online (Credit Limit, DAC, etc.), but users were previously not able to submit a request to schedule an update for account status
  - Added the ability to schedule and update on the account status field
  - Impacts users performing cardholder maintenance for client relationships that have Effective Date Maintenance enabled

Reporting Updates

- Request Status Queue will now be called the “Account History – Request Status Queue Report” for clarity (name now relates to the purpose of the report)
  - Request Category (expanded multi-select list)
  - Request Status (multi-select list)
  - Sort Report by “Last Update Date”, “Last User Update”, and “Account ID”
  - Include Field Maintained to see the change made (only available in Excel output) – 3 new values listed: Field Maintained, Previous Value and New Value
    - Excel is now the default output type
    - If multiple values changed in one request then each change will appear as a new row in the excel output

- Cash Advance Report – user can now:
  - Sort Report By “Cash Limit” in parameter page
  - View “Cash Advance” along with “Cash Limit” in all Report Output Type (Excel, PDF, Active Report & Browser) – allows the user to easily compare spending
  - Before this change, the user was not able to compare the spending as the cash advance limit information for that cardholder was not available

- Account Spend Analysis Report
  - User can Sort Report By account “Open Date”, “Account Status”, “Account Status Description” which can all be viewed in the report result
    - Account Status will contain code (T9, V9 etc.)
    - Account Status Description will define the code (Open, Terminated, Voluntarily Closed etc.)
  - Other Fees are now broken out into Finance Charge, Annual Fee, Misc. Fees, NSF Check Fee, Debit Adjustment, Finance Charge Debit Adjustment, and Other Debits
    - Display in report output for Excel, PDF, Active Report & Browser
    - Sum of all of the fees is added to Total Spend output
    - User can also “Sort Report By” Fee categories listed above