SecurLOCK™ Equip - mConsole Overview

July 2018

Empowering
the Financial World

SecurLOCK™ Equip – mConsole Overview
Introduction

- **Access mConsole**
- **Dashboard tab**
- **Customer Support tab**
- **Reports tab**
- **Financial Institution (FI) Config View tab**

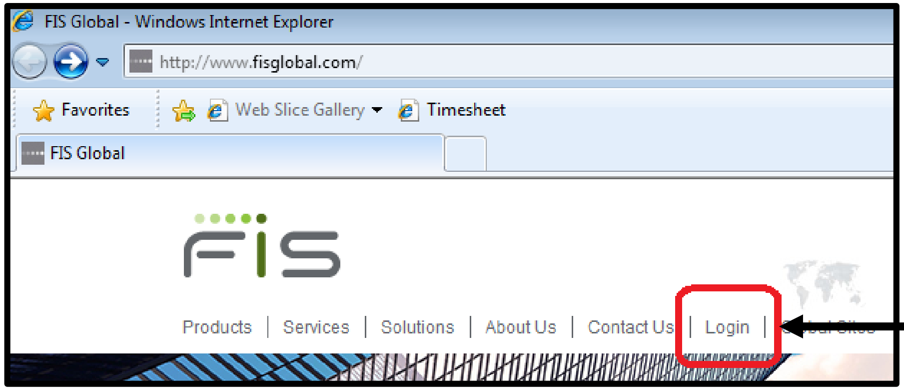
SecurLOCK™ Equip – mConsole Overview
Objectives

- Describe the basic functions of the mConsole application.
- Understand how to use the mConsole application to provide support for the SecurLOCK™ Equip users and analyze system usage.
- Understand how to navigate between the different application screens.

SecurLOCK™ Equip – mConsole Overview
Access mConsole

Access the mConsole application by using FIS eAccess.

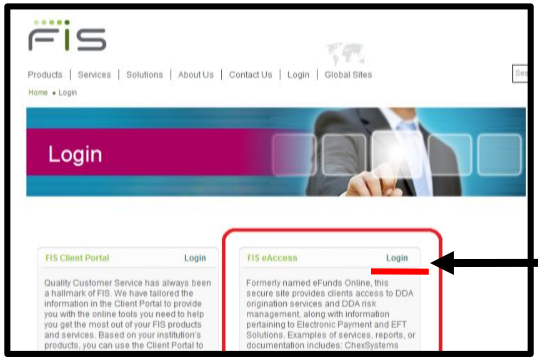
1. Enter this URL: www.fisglobal.com



Click

2. Click Login.

SecurLOCK™ Equip – mConsole Overview
Access mConsole



Click

3. Click Login.

A. Enter

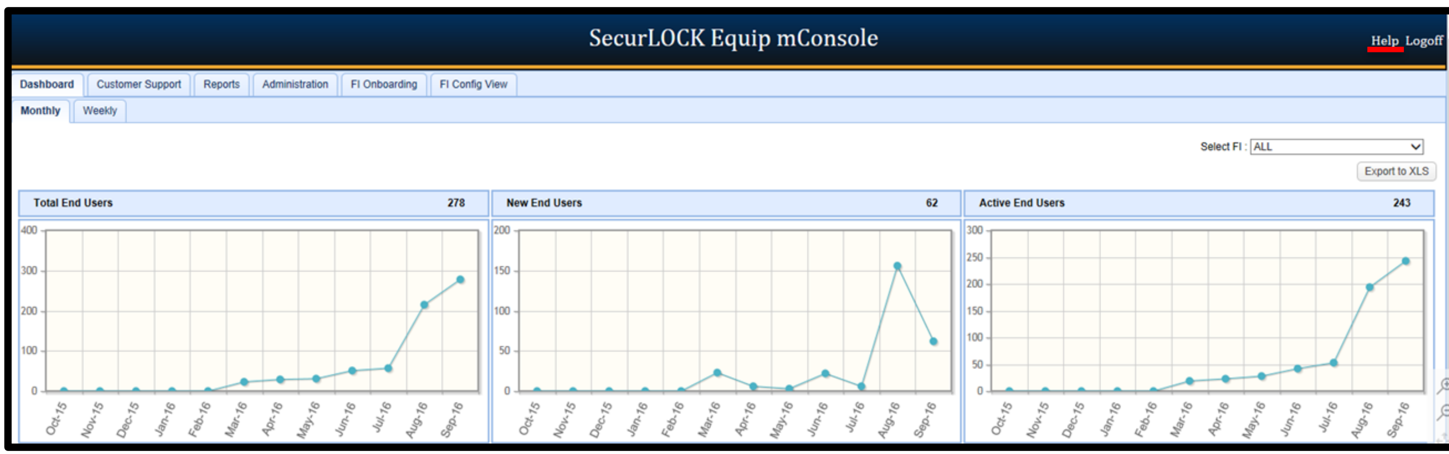
B. Click

4. After selecting the eAccess option, login to FIS eAccess by entering your User ID and password.

SecurLOCK™ Equip – mConsole Overview
Access mConsole

C. Click

5. Click Open to access the SecurLOCK™ Equip mConsole app.

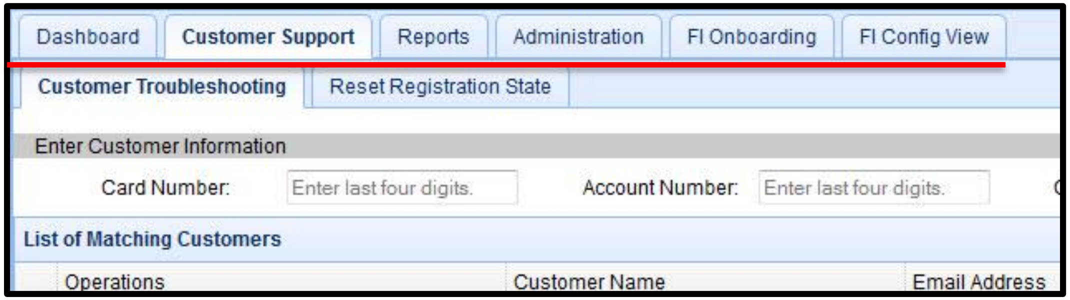


Help

6. The SecurLOCK Equip mConsole app will open in a new browser tab.

*** The "Help" link provides additional, detailed information about each field.**

SecurLOCK™ Equip – mConsole Overview
Access mConsole



- **An FI's users can get access to mConsole through a Single Sign On process via FIS eAccess. Specifically, the user accesses mConsole directly via a secure link within the eAccess portal.**
- **Given the user has access to the link via eAccess, the user is already authenticated and can go directly to mConsole without additional validation.**
- **Modules within mConsole based on the user privileges: Dashboard, Cardholder Support, Reports, FI Config View.**
- **Information within the application can help track a customer's usage.**
- **FIS Client/Customer Support can also access this application (see Slide #23).**

SecurLOCK™ Equip – mConsole Overview
Access mConsole

Group Name roles:	FI Admin	FI User	FI User - limited
Recommended Access Privileges	FI Tech Support and Management	Consumer Support	Limited Consumer Support
Dashboard			
Monthly	X		
Weekly	X		
Customer Support			
Customer Troubleshooting	X	X	X
Reset Registration State	X	X	X
Customer Details	X	X	X
On Behalf Of	X	X	
Activity Viewer	X	X	X
Reports			
View Generated Report	X		
View Scheduled Report	X		
Create Report	X		
Custom Report			
FI Config View			
FI Config View	X		

SecurLOCK™ Equip – mConsole Overview
Access mConsole

- **A user can have access to one or multiple modules within mConsole based on their Role definition. Role definitions are predefined at the system level.**

- **There is no limit to the number of users that a financial institution can define.**

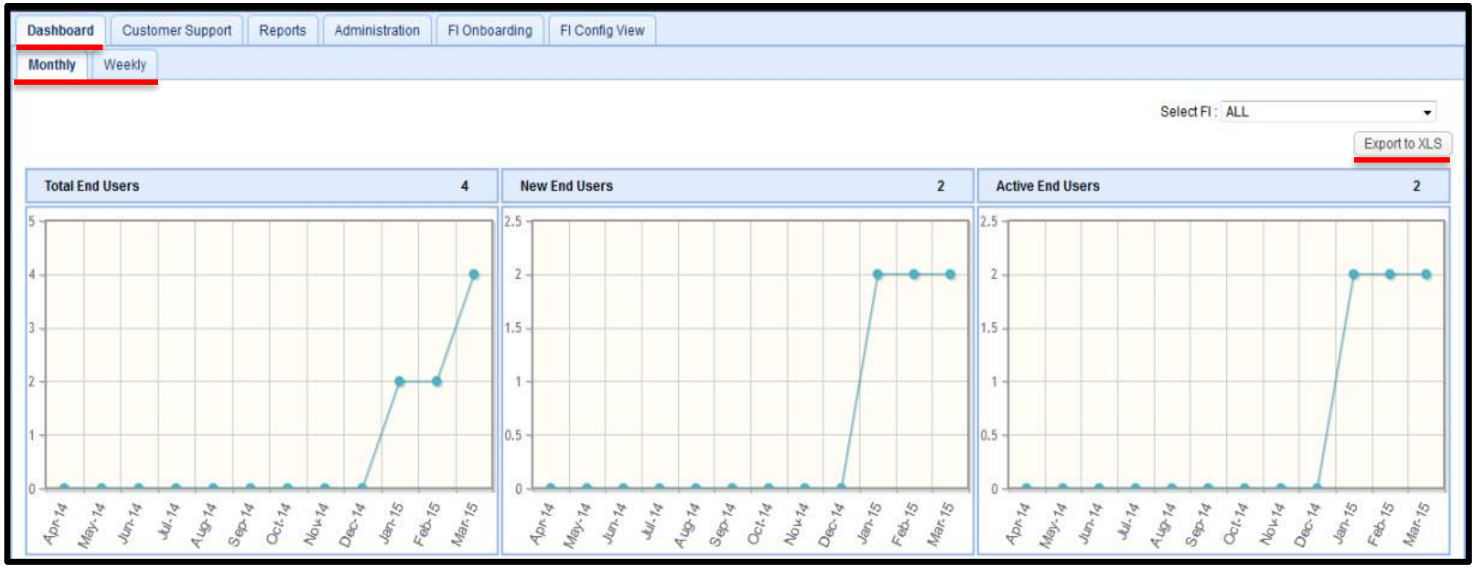
- **FI user roles can have access only to that financial institution's information.**

SecurLOCK™ Equip – mConsole Overview
Dashboard Tab

- **General information**
- **Portlets**
- **Export data to a spreadsheet**
- **Monthly view**
- **Weekly view**

Dashboard Tab
General Information

View options



Export

- The Dashboard information can be viewed on a Monthly or Weekly basis by selecting the appropriate tabs.
- An FI's users can only view information specific to that FI.
- The raw data of the graphs in Dashboard view can be exported to Excel using the "Export to XLS" function.
- An agent bank's users can choose a specific FI or all FI's to view by choosing from the "Select FI" drop down.

Dashboard Tab
Portlets

- **Total End Users portlet**
- **New End Users portlet**
- **Active End Users portlet**
- **Transaction Alerts portlet**
- **Alerts by Categories portlet**
- **Transaction Controls portlet**
- **Controls by Categories portlet**

Portlets
Total End Users Portlet

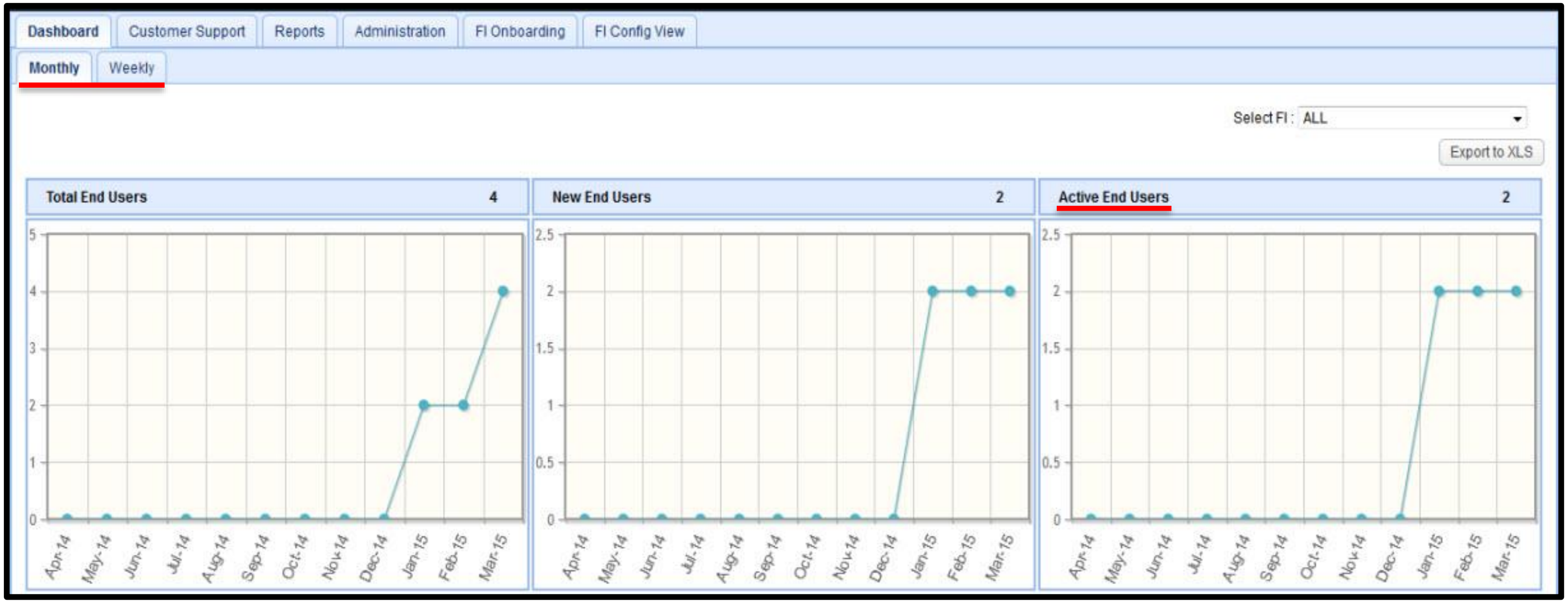
- **The Dashboard screen is the default landing page when users first login. It provides key metrics reports related to registration, transaction alerts and controls.**
- **Provides current data from the previous day.**
- **The Total End Users portlet shows the total cumulative number of registered users in the system by month or week.**

Portlets
New End Users Portlet

- **The New End Users portlet shows the total number of newly registered users that have been added to the system by month or week.**

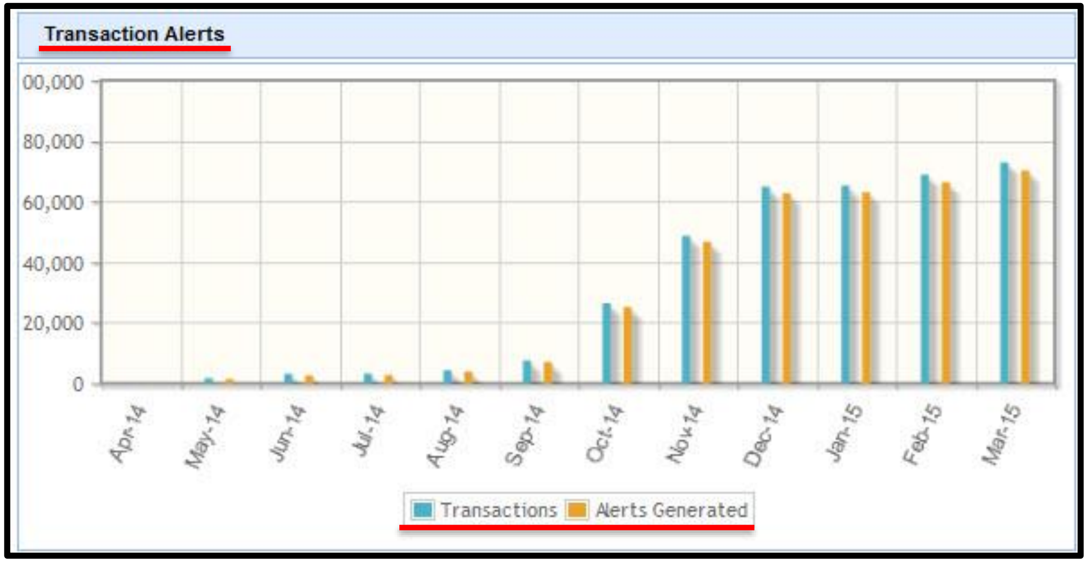
Portlets

Active End Users Portlet



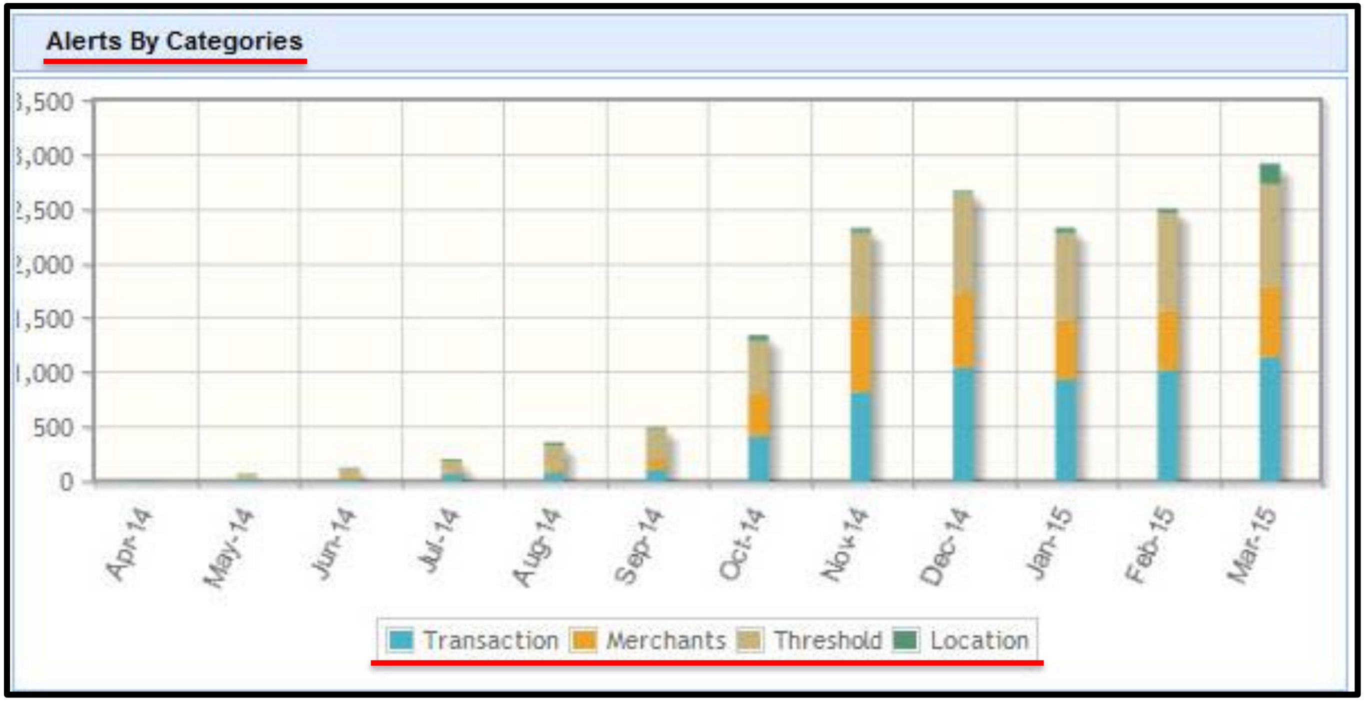
- **The Active End Users portlet shows the number of active users by week or month.**
- **An active user is one who has made a card transaction or received an alert within a given calendar week or month.**

Portlets
Transaction Alerts Portlet



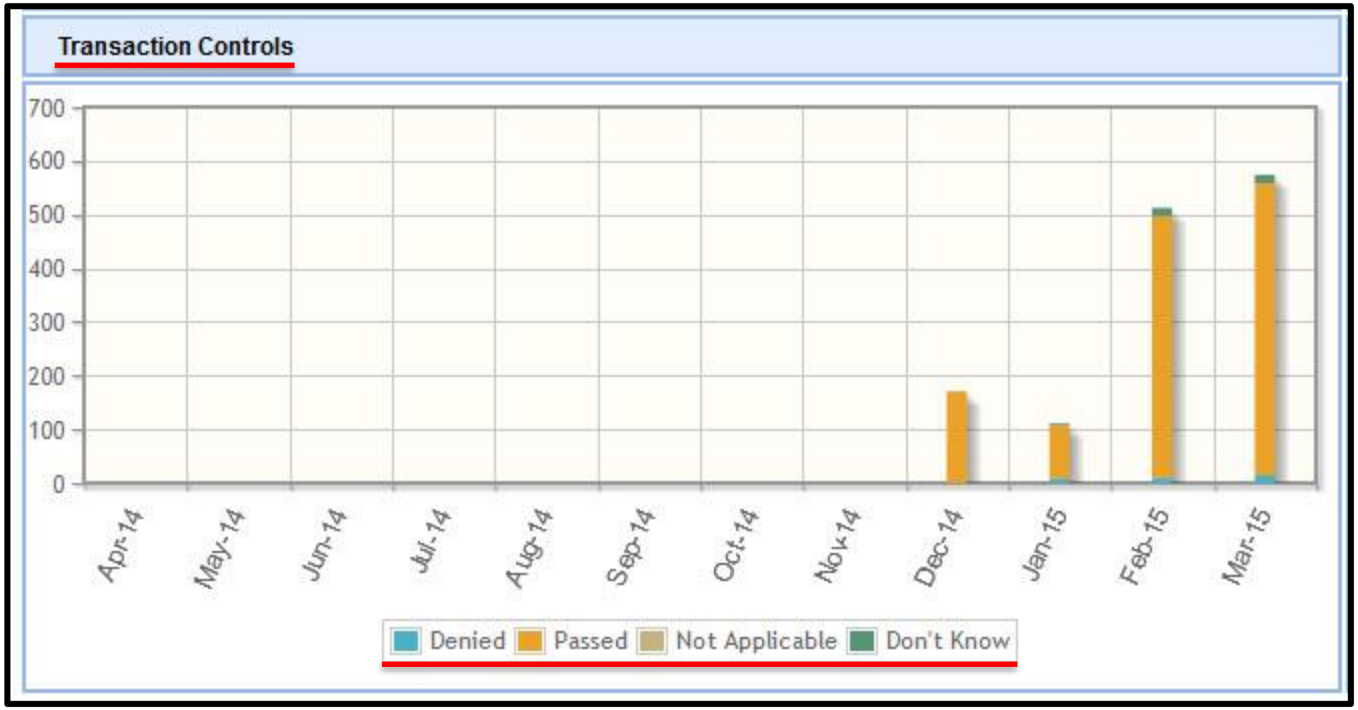
- **The Transaction Alerts portlet shows data regarding transaction alerts going through the system by month.**
- **This graph consists of two key pieces of data:**
  - Transactions - The first bar shows the total number of transactions processed by the system in the given period.
  - Alerts - The second bar shows the total number of transactions for which an alert was generated.

Portlets
Alerts By Category Portlet



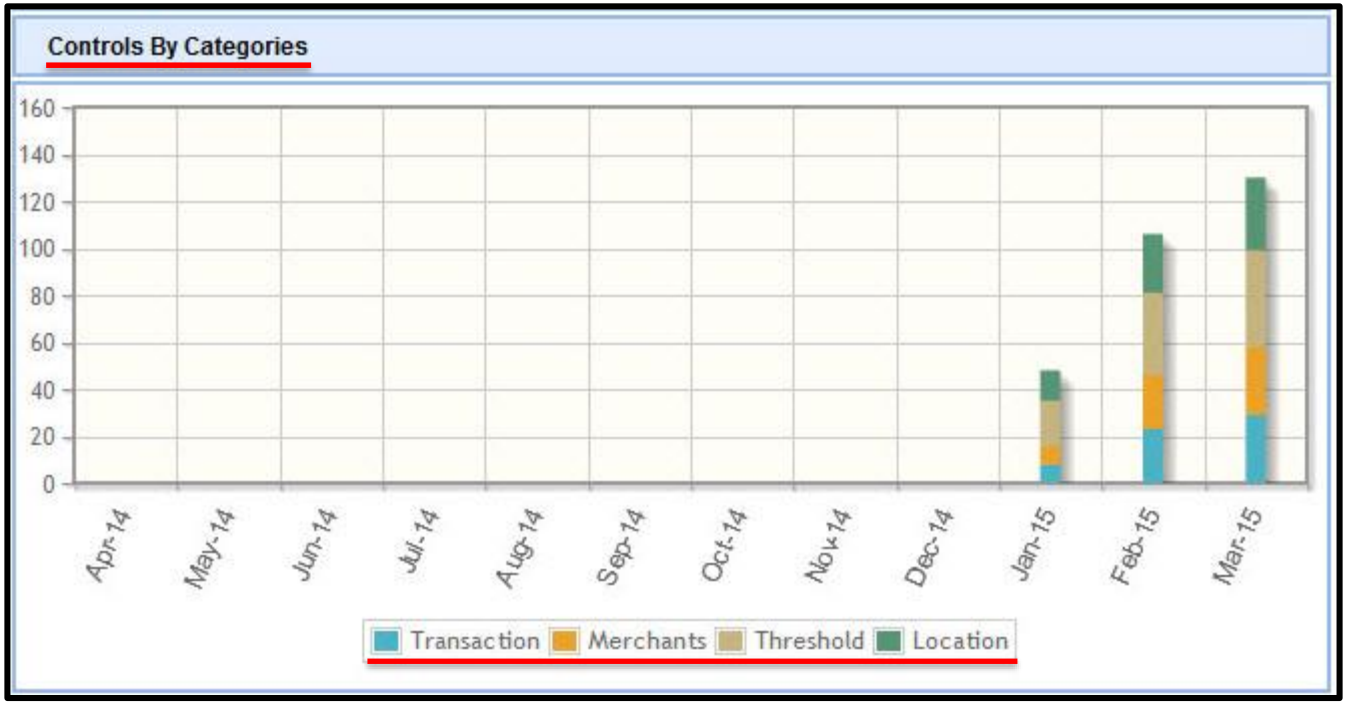
- **The Alerts By Categories portlet shows the number of alerts in a given period by category.**
- **Four categories are shown: Transaction (type), Merchants (type), Threshold, and Location.**
- **Put cursor over a color within the column to display the number of alerts by that category.**

Portlets
Transaction Controls Portlet



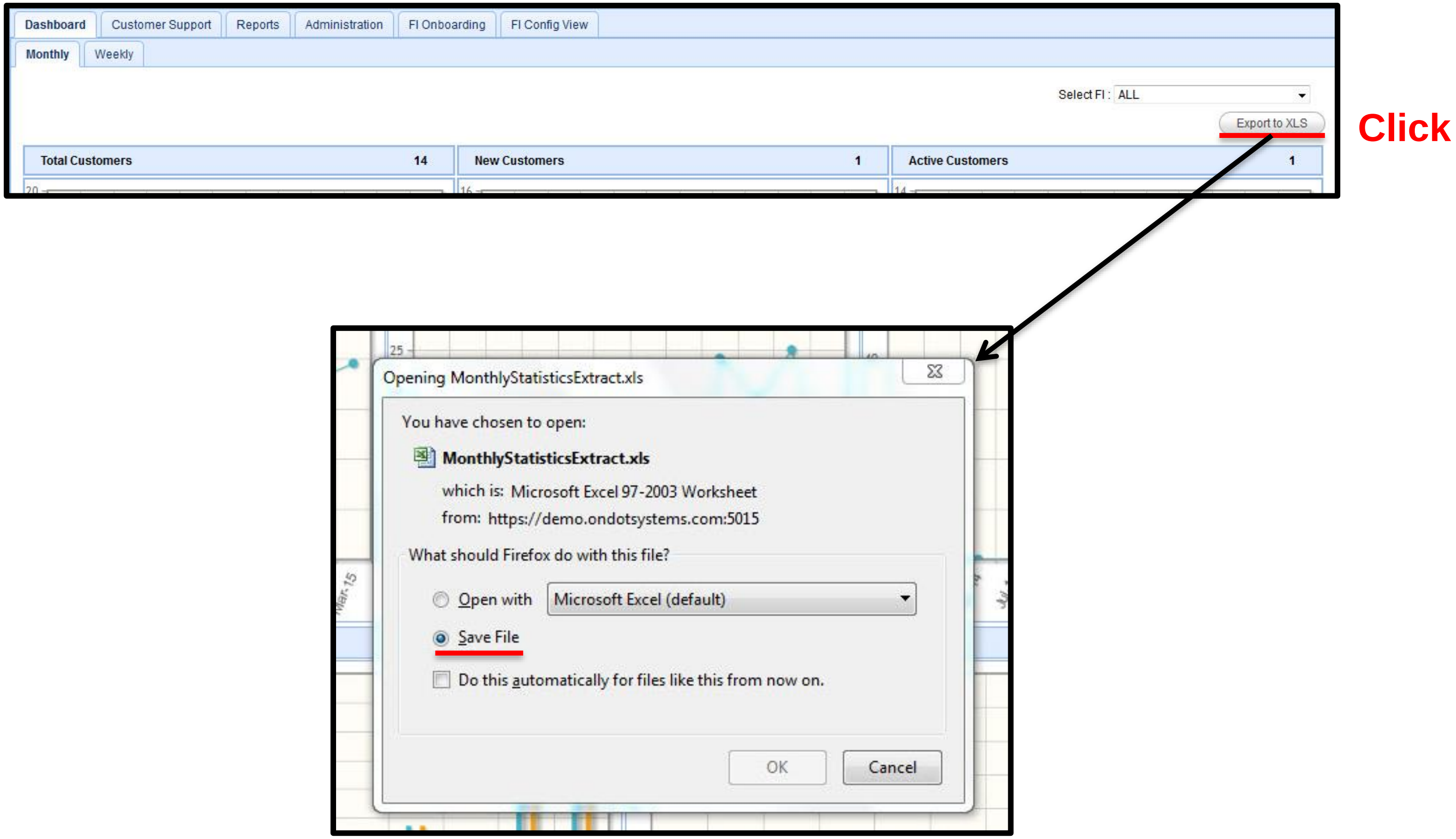
- **The Transaction Controls portlet shows data regarding controls going through the system.**
- **The data is separated into four segments: Denied, Passed, Not Applicable, Don't Know.**

Portlets
Controls By Categories Portlet



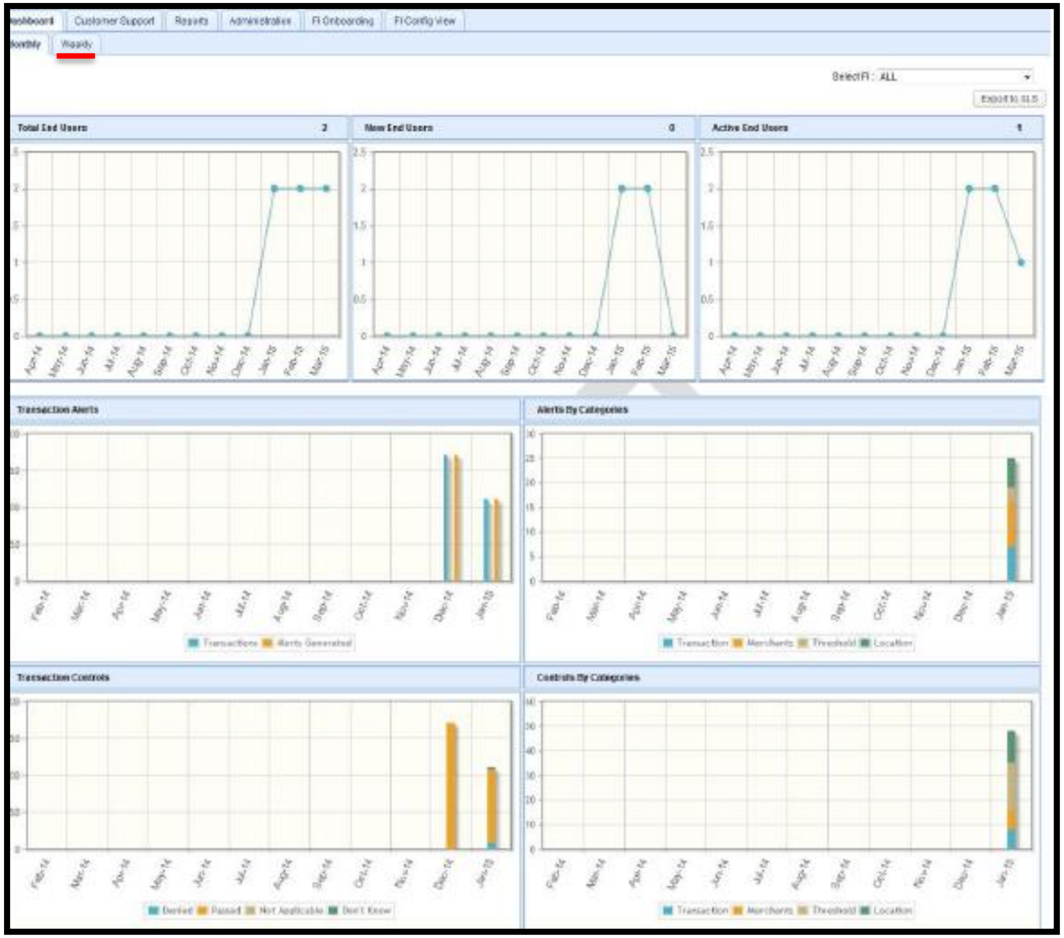
- **The Controls By Category portlet shows the number of controls in a given period by category.**
- **Controls are divided into four categories, which correspond to policies set by the customer within the application: Transaction (Type), Merchants (Type), Location, and Threshold.**

Access mConsole
Export Data To a Spreadsheet



- **Information from a portlet can be exported to a spreadsheet.**

Access mConsole
Weekly View

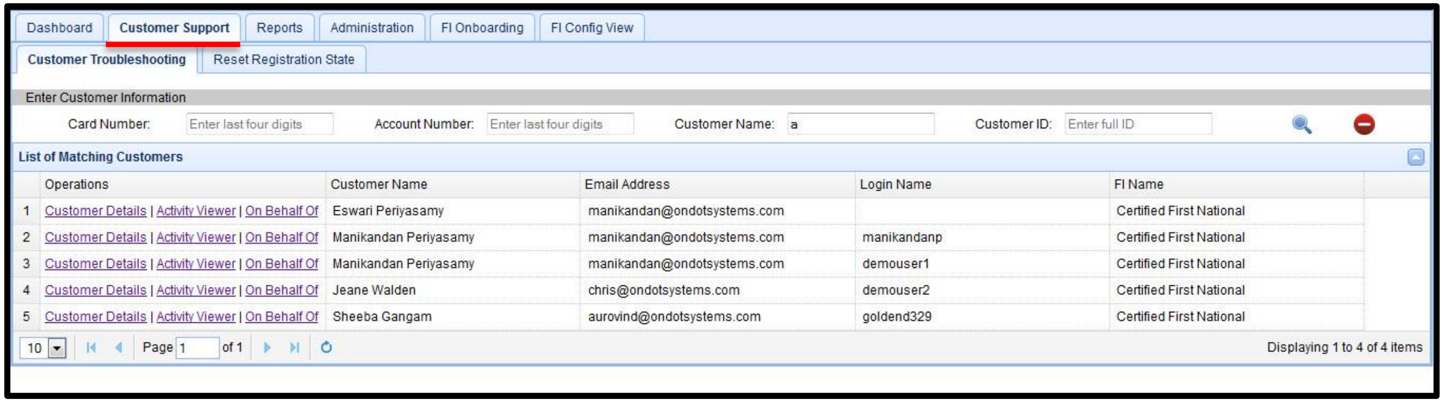


- **Portlet activity is reported on a weekly basis as well.**

SecurLOCK™ Equip - mConsole Overview
Customer Support Tab

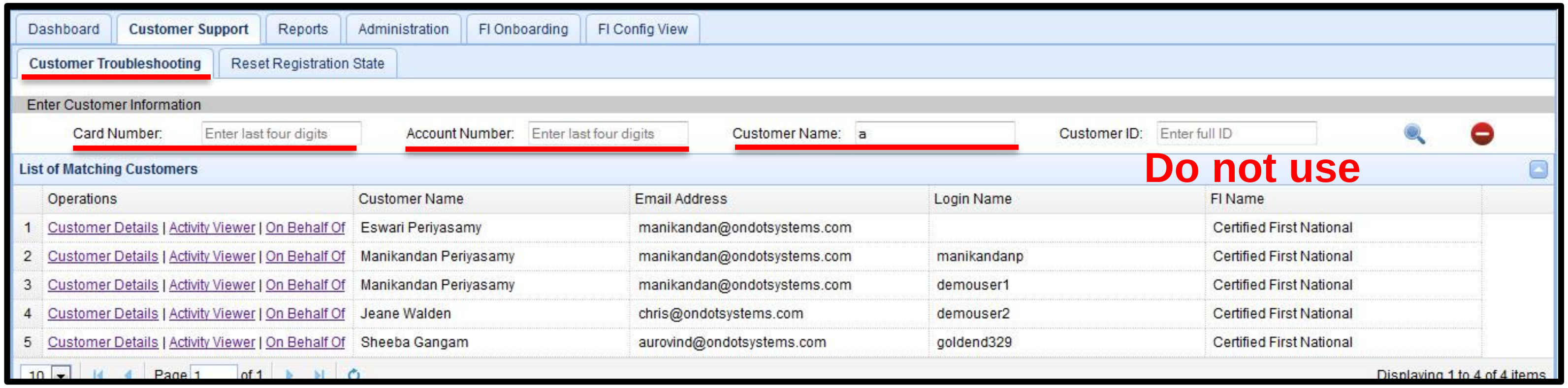
- **General information**
- **Customer Troubleshooting tab**
- **Reset Registration State tab**
- **Customer Details tab**
- **Customer Activity tab**
- **On Behalf Of tab**

Customer Support Tab
General Information



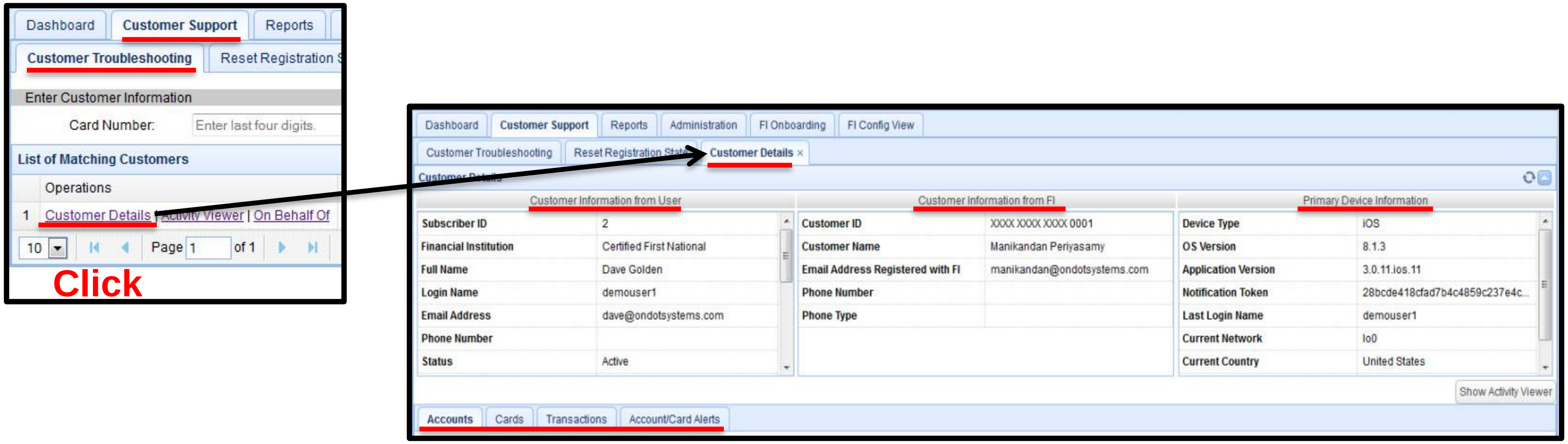
- **The Customer Support Tab is designed to enable Customer Support reps to effectively help end users with problems using the app. Specifically, it provides the following functionality:**
  - Search for customers.
  - View customer's details and their associated cards, transactions, and messages.
  - View all actions the user took on the device.
  - Assist the user by performing specific user-limited functions, when the user does not have access to the device.

Customer Support Tab
Customer Troubleshooting Tab - Customer Search



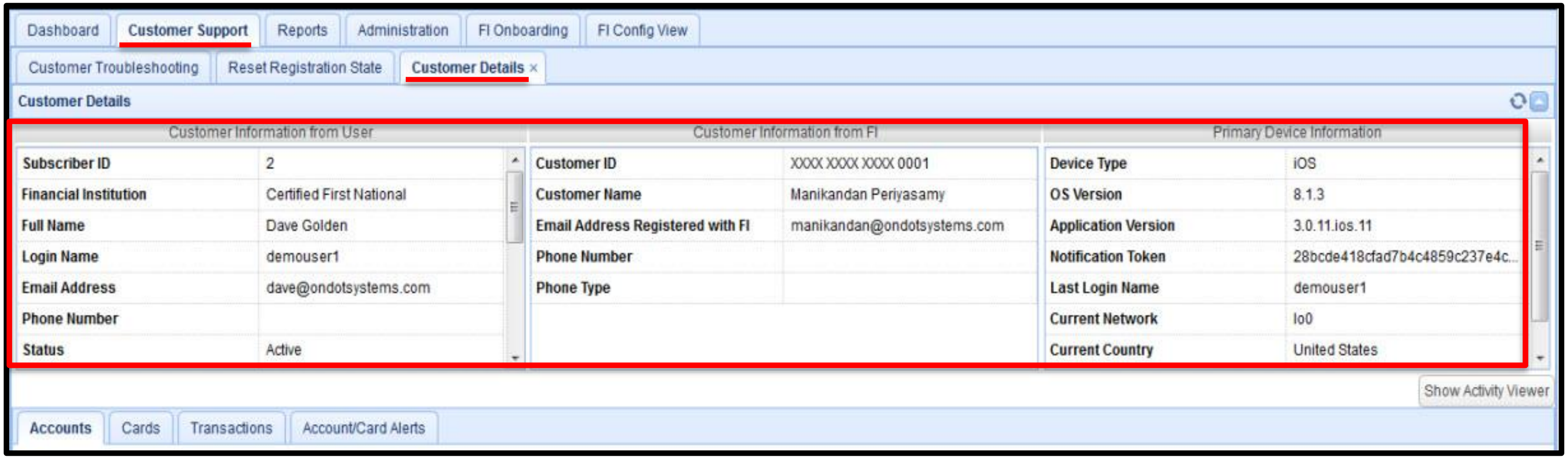
- **mConsole users can search for customers by using one or <u>several</u> of the following search criteria (no wildcards):**
  - Last 4 digits of the card number.
  - Account number linked to the card – not functional.
  - Partial customer name (first or last) or login id.
- **To search, type the information in the appropriate box(es), then tap the magnifying glass icon.**
- **To clear all search criteria and results, tap on the Clear icon.**
- **The Customer ID field should not be used for searching.**

Customer Support Tab
Customer Troubleshooting Tab – Customer Details Display



- **mConsole users can click on the Customer Details link to view detailed customer information. The default Customer Details page shows the following sections:**
  - Customer Information entered by the customer through the app
  - Customer Information retrieved from the FI’s system of record
  - Information on the customer’s primary device
  - Customer’s Cards, Transactions, and Account/Card Alerts

Customer Support Tab
Customer Troubleshooting Tab – Customer Details Display



- The information displayed at the top of the Customer Details tab may be useful to a Customer Support rep in helping resolve a customer's issues.
- The Accounts sub-tab at the bottom of the Customer Details page is not used.

Customer Support Tab
Customer Troubleshooting Tab – Customer Details Display

- **Device is Primary**

Primary Device Information	
Device Type	iOS
OS Version	11.3.1
Application Version	1.0.7
Notification Token	c1d6b78eddee2f966539ee9cc547.
Last Login Name	clg0213
Current Network	lo0
Current Country	United States

Primary Device Information	
Device Type	iOS
OS Version	11.3.1
Application Version	1.0.0
Notification Token	6b871ecde92015ceaee55e28ede2...
Last Login Name	
Current Network	lo0
Current Country	United States

- **Images on the left are examples from SecurLOCK Equip stand-alone product**
- **Images on the right are examples from API Integrated Card Controls**

- **Device is NOT Primary**

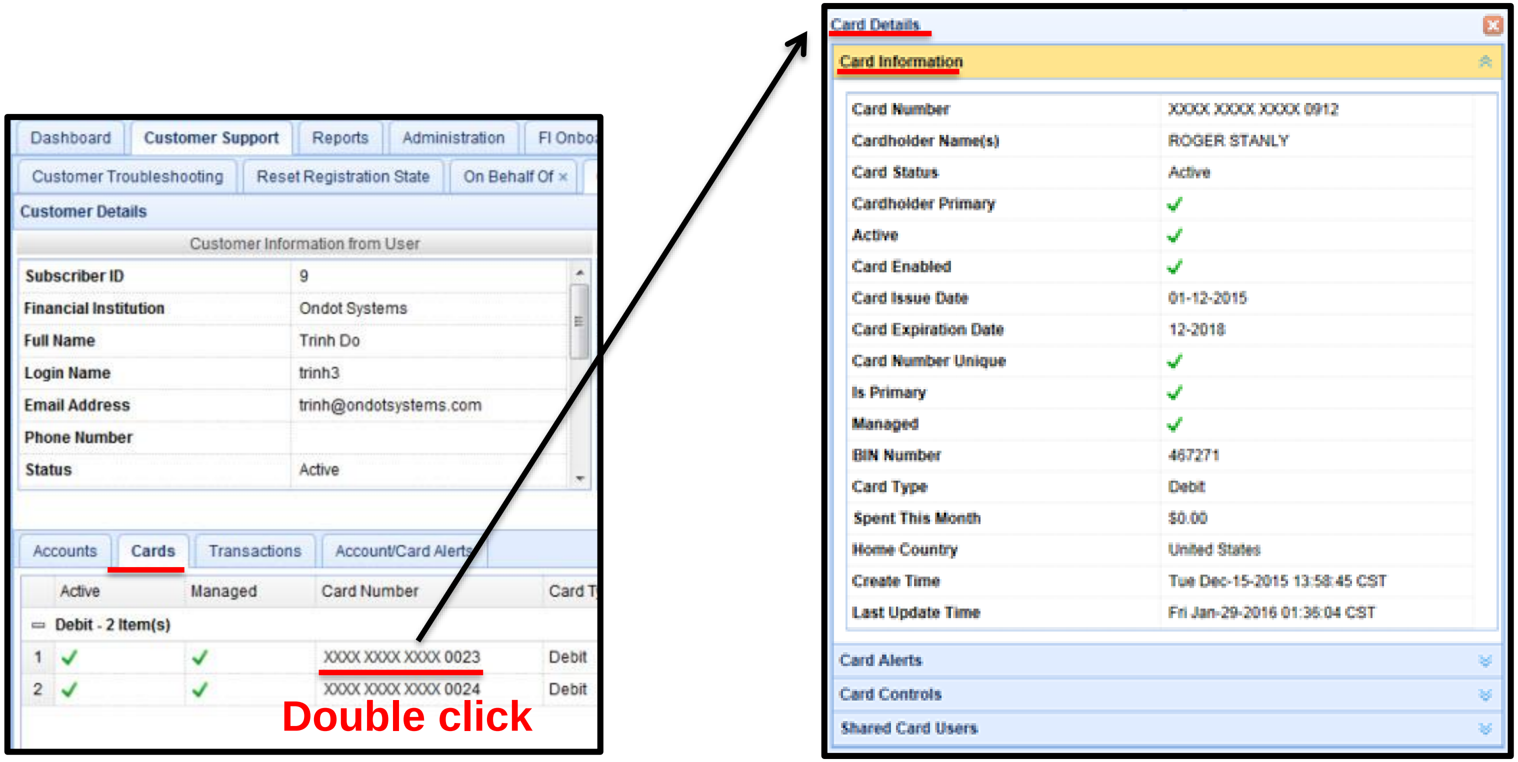
Primary Device Information	
Device Type	
OS Version	
Application Version	
Notification Token	
Last Login Name	
Current Network	
Current Country	

Primary Device Information	
Device Type	
OS Version	-1
Application Version	
Notification Token	
Last Login Name	
Current Network	NA
Current Country	

Customer Support Tab
Customer Details Tab

- **Cards tab**
- **Transactions tab**
- **Account/Card Alerts tab**
- **Activity Viewer tab**

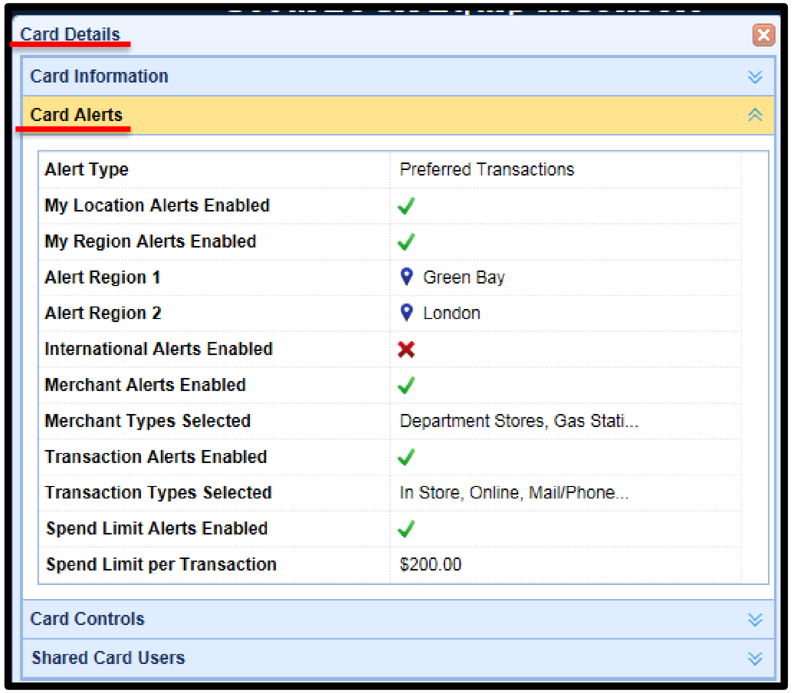
Customer Support Tab
Customer Details Tab - Cards Tab – Card Information



- **To view Card information, the user clicks on the Cards sub-tab.**
- **Double clicking on a card will bring up the Card Details pop-up, which shows detailed information about the card.**
- **Time shown in mConsole is in Central Time (CST).**

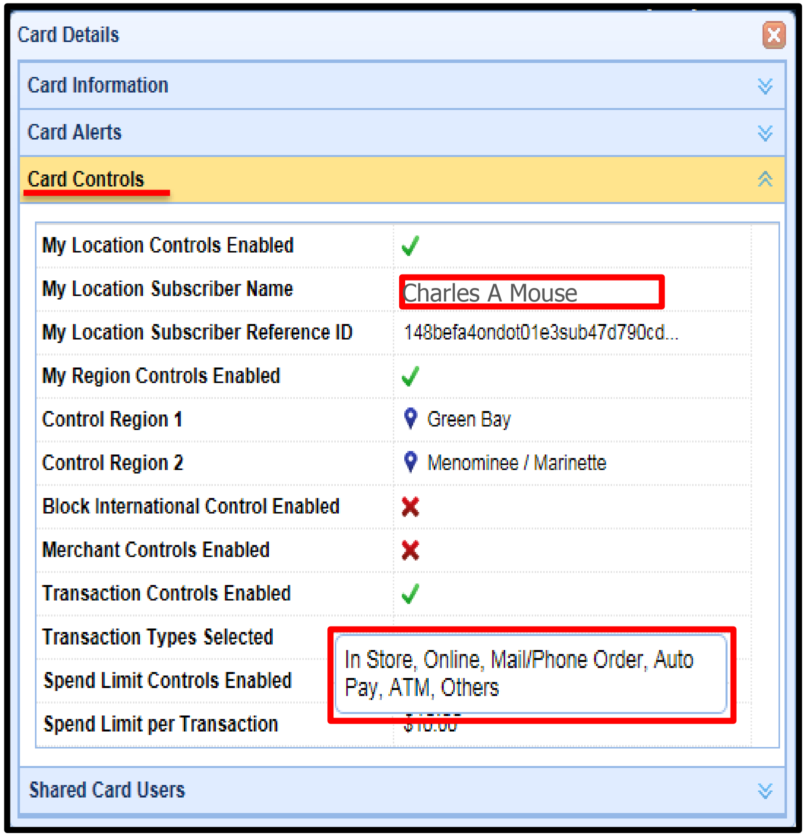
Customer Support Tab

Customer Details Tab - Cards Tab – Card Alerts



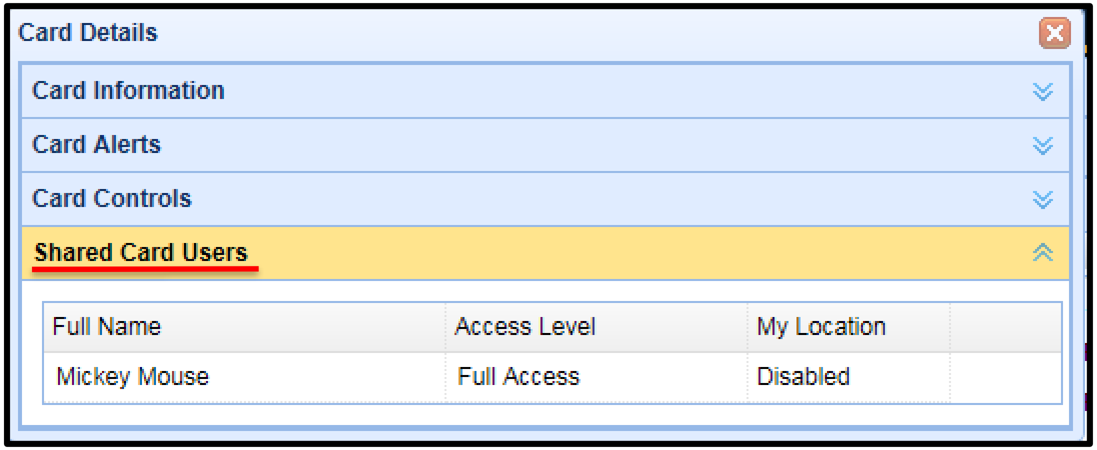
- **The Card Details pop-up screen is organized into four expandable/collapsible accordion panes: Card Information, Card Alerts, Card Controls and Shared Card Users.**
- **Tapping on the up/down arrow next to each pane will expand it while closing the other three panes.**
- **The Card Alerts pane shown here displays which Alert Preferences the user has set for the card.**

Customer Support Tab
Customer Details Tab - Cards Tab – Card Controls



- **The Card Controls pane shows what Control Preferences the user has set for the card.**

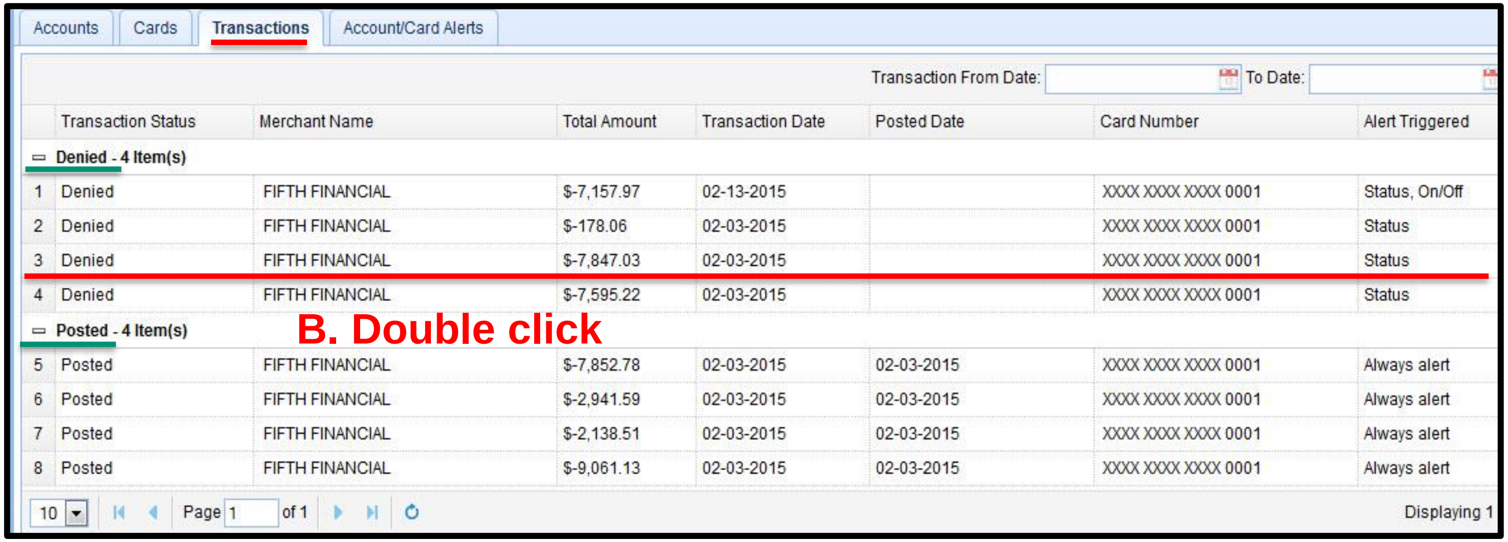
Customer Support Tab
Customer Details Tab - Cards Tab – Shared Card Users



- **The Card Controls pane shows if other users are subscribed to the same card. In this case another user, Mickey Mouse, has also registered this card.**

Customer Support Tab
Customer Details Tab – Transactions Tab

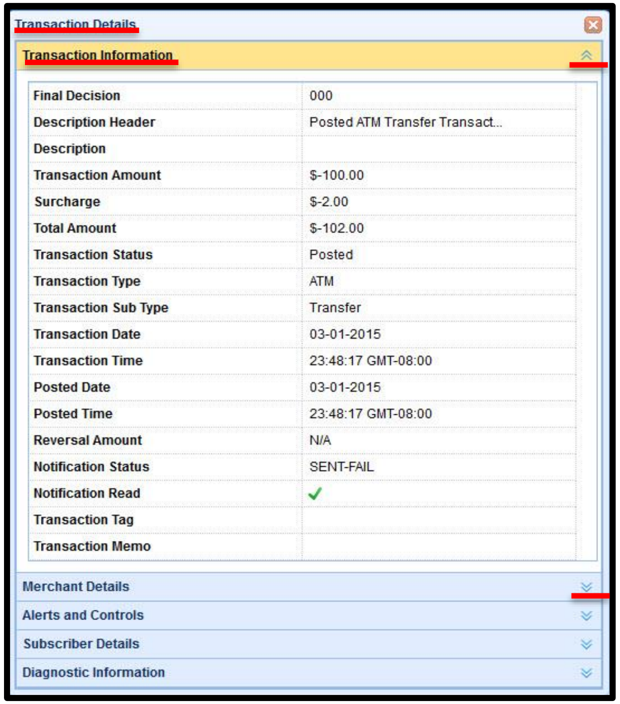
A. Click



	Transaction Status	Merchant Name	Total Amount	Transaction Date	Posted Date	Card Number	Alert Triggered
Denied - 4 Item(s)							
1	Denied	FIFTH FINANCIAL	$-7,157.97	02-13-2015		XXXX XXXX XXXX 0001	Status, On/Off
2	Denied	FIFTH FINANCIAL	$-178.06	02-03-2015		XXXX XXXX XXXX 0001	Status
3	Denied	FIFTH FINANCIAL	$-7,847.03	02-03-2015		XXXX XXXX XXXX 0001	Status
4	Denied	FIFTH FINANCIAL	$-7,595.22	02-03-2015		XXXX XXXX XXXX 0001	Status
Posted - 4 Item(s)							
5	Posted	FIFTH FINANCIAL	$-7,852.78	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
6	Posted	FIFTH FINANCIAL	$-2,941.59	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
7	Posted	FIFTH FINANCIAL	$-2,138.51	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
8	Posted	FIFTH FINANCIAL	$-9,061.13	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert

- **Clicking on the Transactions sub-tab in the bottom section of the Customer Details page will display a list of recent transactions made on the cards.**
- **Double-clicking on a transaction brings up the Transaction Details pop-up screen, which shows detailed information about the transaction.**
- **Each group is represented by an expandable/collapsible pane, so that it only shows the transactions with the specific transaction status.**

Customer Support Tab
Customer Details Tab – Transactions Tab – Transaction Information

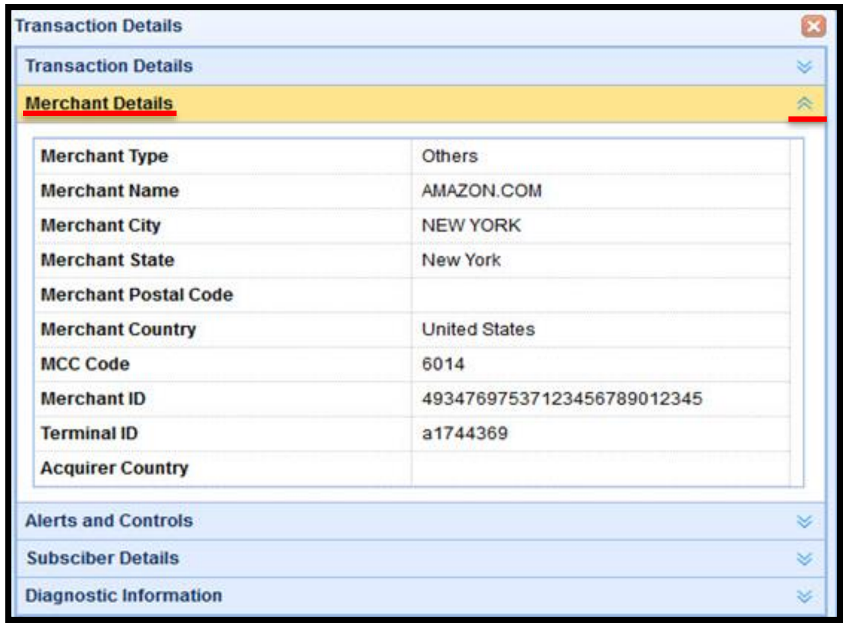


Click

Click

- Clicking on a transaction will cause the Transaction Details pop-up to display.
- The Transaction Details pop-up is organized into five expandable/collapsible accordion panes: Transaction Information, Merchant Details, Alerts and Controls, Subscriber Details, and Diagnostic Information.
- Tapping on the up/down arrow next to each pane will expand it while closing others.

Customer Support Tab
Customer Details Tab – Transactions Tab – Merchant Details



Click

- Clicking on the Merchant Details arrow will display this pane and close the other panes.
- The Merchant Type field shows the merchant type categorization for the merchant, based on the MCC code sent in the transaction message.

Customer Support Tab

Customer Details Tab – Transactions Tab – Alerts and Controls

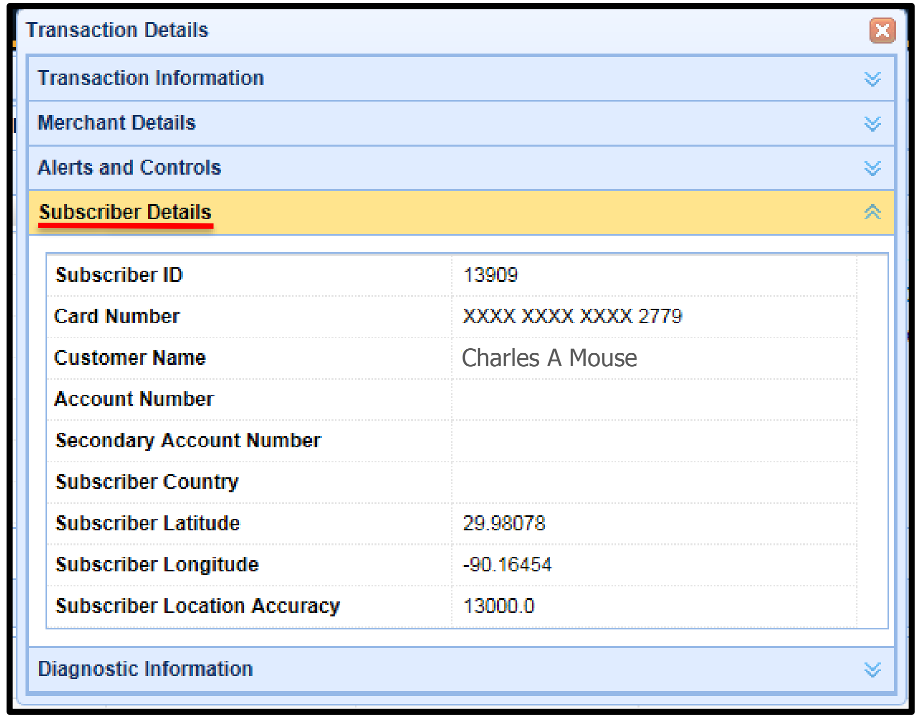
- **Controls Applied to Transaction** shows all the control policies set by the user to evaluate the transaction.
- **Control Recommendation** shows the recommendation for the transaction.
- **Recommendation Reason** shows all the control policies applied to the transaction. One of the below recommendations will show:
  - Not Invoked
  - Not Provisioned
  - Not Applicable
  - Rejected
  - Don't Know
  - Approved
- **Transaction Alert Generated** appears if an alert was generated for the transaction. This field indicates which alert policies, set by the user, triggered the alert.

Alerts and Controls

Controls Applied to Transaction	Status	
	Card On/Off	
	My Location	
	Transaction Types	
	Merchant Types	
	My Regions	
	Spend Limits	
	ofw card state	
	Monthly Threshold	
	Weekly Threshold	
	Warning Alert	
Control Recommendation	Approved	
Recommendation Reason	Status	Not_Invoked
	Card On/Off	Approved
	My Location	Approved
	Transaction Types	Not_Invoked
	Merchant Types	Not_Invoked
	My Regions	Not_Invoked
	Spend Limits	Approved
	Block International	Not_Applicable
	ofw card state	Approved
	Monthly Threshold	Not_Invoked
	Weekly Threshold	Not_Invoked
	Warning Alert	Not_Invoked
Transaction Alert Generated	Always alert	
Valid	✓	

Customer Support Tab

Customer Details Tab – Transactions Tab – Subscriber Details



- **This pane contains various information about the subscriber including their card number, name, and location.**
- **If the user has set either My Location control or My Location alert preference, the user's location information will be shown in the Subscriber Latitude, Subscriber Longitude, and Subscriber Location Accuracy fields.**

Customer Support Tab

Customer Details Tab – Transactions Tab – Diagnostic Information

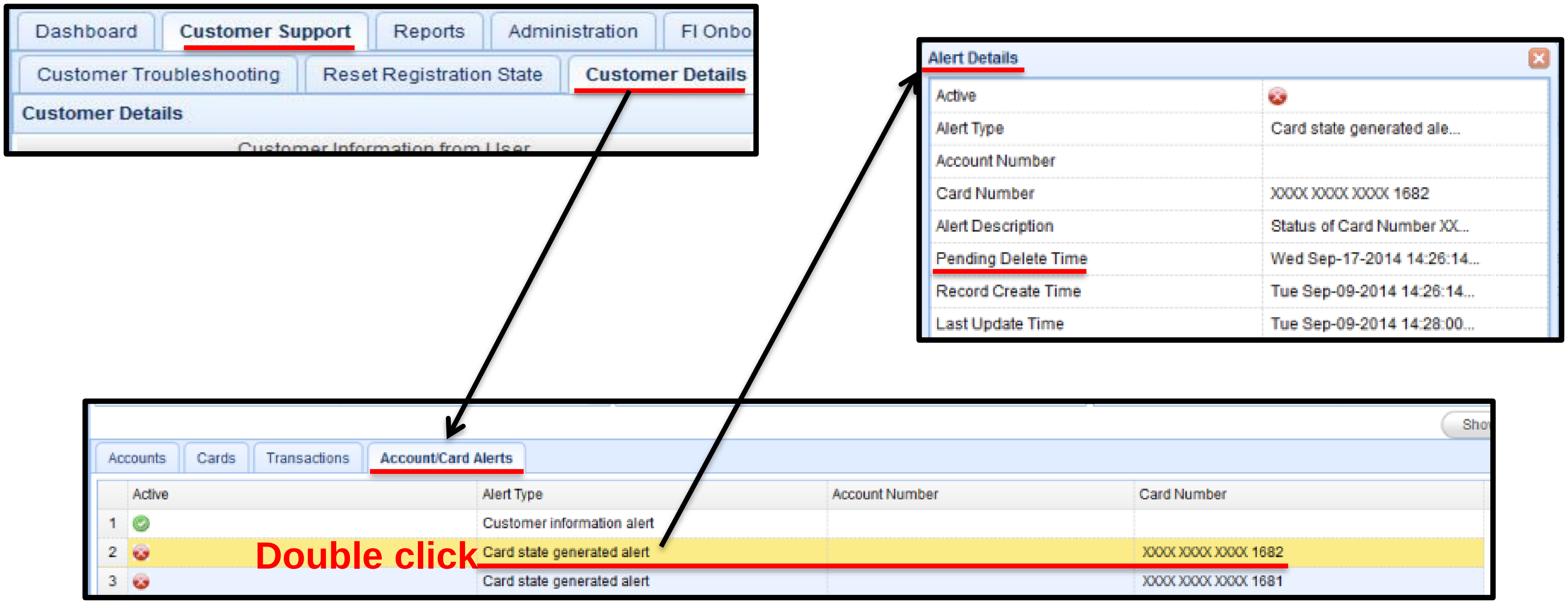
Transaction Details

- Transaction Information
- Merchant Details
- Alerts and Controls
- Subscriber Details
- Diagnostic Information

Auth Elapsed Time (ms)	35
Notification Elapsed Time (ms)	258
Auth Message Receive Time	Apr-24-2015 01:51:06:279 GMT...
Alert Message Receive Time	Apr-24-2015 01:51:08:317 GMT...
Message Receive Time by FI Server	Apr-24-2015 01:51:08:397 GMT...
Acknowledgement ID	49216fd4-14f1-41cc-9b73-53cd...
Additional Data	pin:false
Pending Delete Date	
Record Create Time	Apr-24-2015 01:51:08 GMT-08:00
Last Update Time	Apr-24-2015 01:51:10 GMT-08:00
Advanced: COM Object ID	1ae8e25c-f451-4ffc-a0b9-59be...
Advanced: Auth Fin Req Res	88378a2e84b4c6407e936b4b6512...
Advanced: Auth Adv	442c24fa11589c7dd486ad99c98e...
Advanced: Fin Adv	7267c443f663c194521fecc42d73...
Advanced: Rev	15f7cc5a5657222304e982f2a678...
Push Transaction Number	601380241428
Pull Transaction Number	
Trace Number	362161

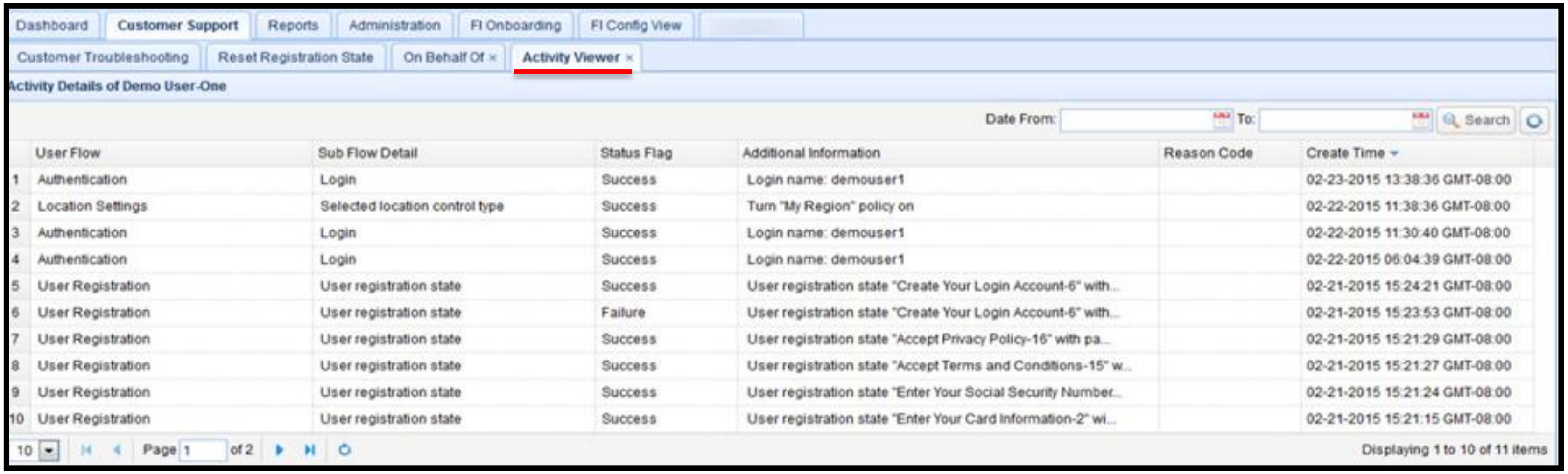
- **The information shown in this pane is used for advanced troubleshooting of issues.**

Customer Support Tab
Customer Details Tab – Account/Card Alerts Tab



- From the Customer Support tab, click the Customer Details tab.
- The Account/Card Alerts sub-tab shows all card status or account status alerts the customer has received.
- Double-clicking on an alert brings up the Alert Details pop-up, which shows detailed information about the alert (e.g., a status change in the card from “Active” to “Inactive”).
- Pending Delete Time indicates when the alert will be rolled off of the system, after a period of 8 days.

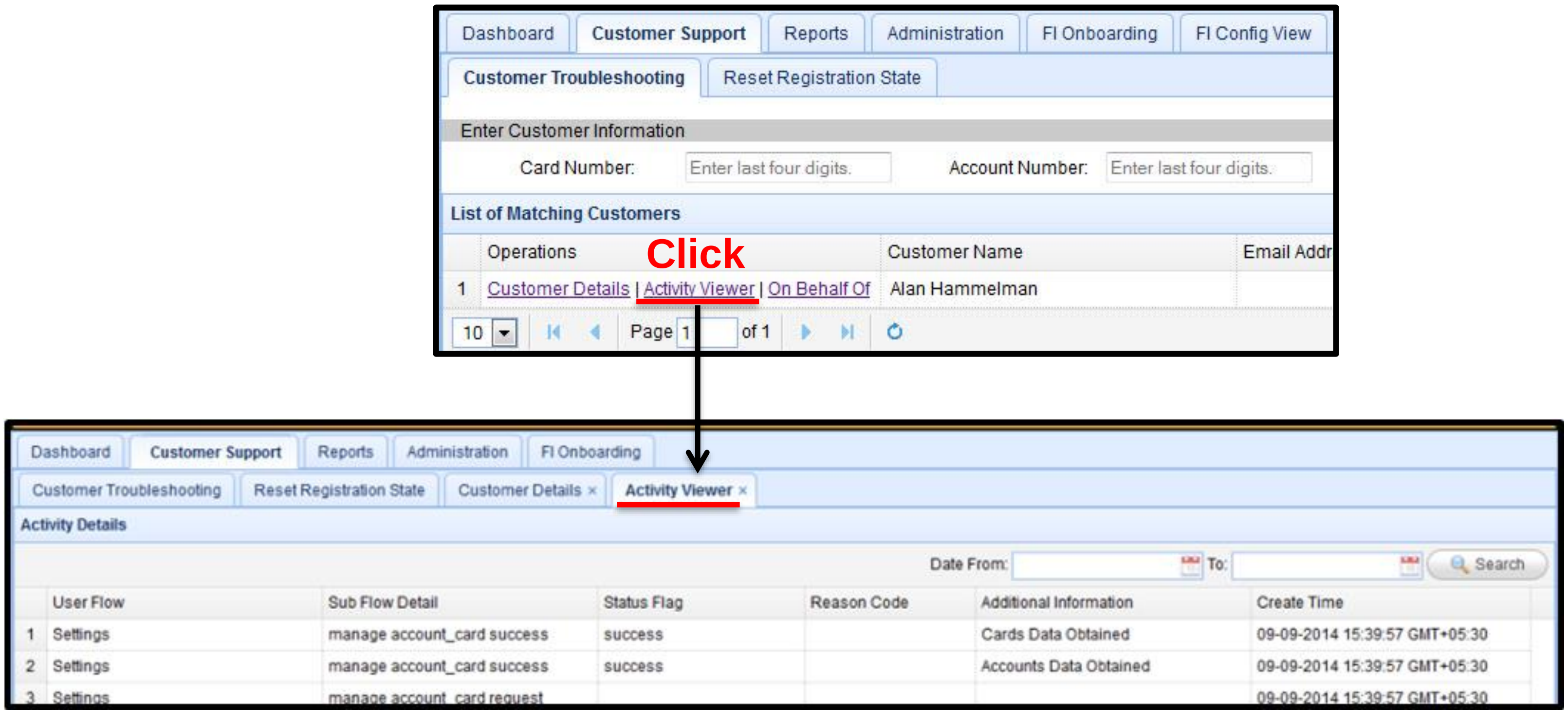
Customer Support Tab
Activity Viewer Tab



	User Flow	Sub Flow Detail	Status Flag	Additional Information	Reason Code	Create Time
1	Authentication	Login	Success	Login name: demouser1		02-23-2015 13:38:36 GMT-08:00
2	Location Settings	Selected location control type	Success	Turn "My Region" policy on		02-22-2015 11:38:36 GMT-08:00
3	Authentication	Login	Success	Login name: demouser1		02-22-2015 11:30:40 GMT-08:00
4	Authentication	Login	Success	Login name: demouser1		02-22-2015 06:04:39 GMT-08:00
5	User Registration	User registration state	Success	User registration state "Create Your Login Account-6" with...		02-21-2015 15:24:21 GMT-08:00
6	User Registration	User registration state	Failure	User registration state "Create Your Login Account-6" with...		02-21-2015 15:23:53 GMT-08:00
7	User Registration	User registration state	Success	User registration state "Accept Privacy Policy-16" with pa...		02-21-2015 15:21:29 GMT-08:00
8	User Registration	User registration state	Success	User registration state "Accept Terms and Conditions-15" w...		02-21-2015 15:21:27 GMT-08:00
9	User Registration	User registration state	Success	User registration state "Enter Your Social Security Number...		02-21-2015 15:21:24 GMT-08:00
10	User Registration	User registration state	Success	User registration state "Enter Your Card Information-2" wi...		02-21-2015 15:21:15 GMT-08:00

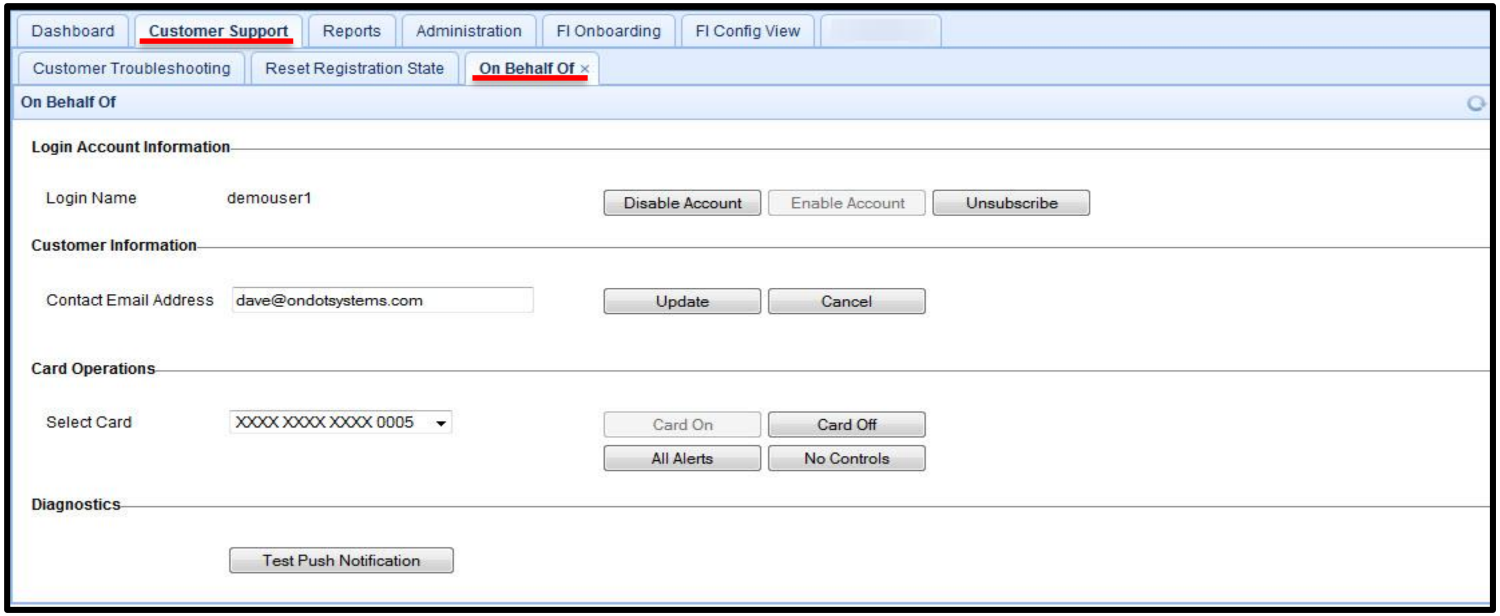
- **The Activity Viewer sub-tab displays actions the user has taken on the mobile application and actions taken by the system due to the user's activities.**
- **The Activity Viewer also shows On Behalf Of action taken by mConsole users on the end user's record.**
- **This page provides information that is meant to be used by Customer Support Representatives as the first level troubleshooting tool.**
- **Activity is hard deleted every 90 days.**

Customer Support Tab
Activity Viewer Tab



- **A user can also access this page by clicking on the "Activity Viewer" link associated with a cardholder on the Customer Search page, or by clicking "Show Activity Viewer" on the Customer Details page.**
- **There is no exporting capability for Activity Viewer. The information is purged after 90 days.**

Customer Support Tab
On Behalf Of Tab

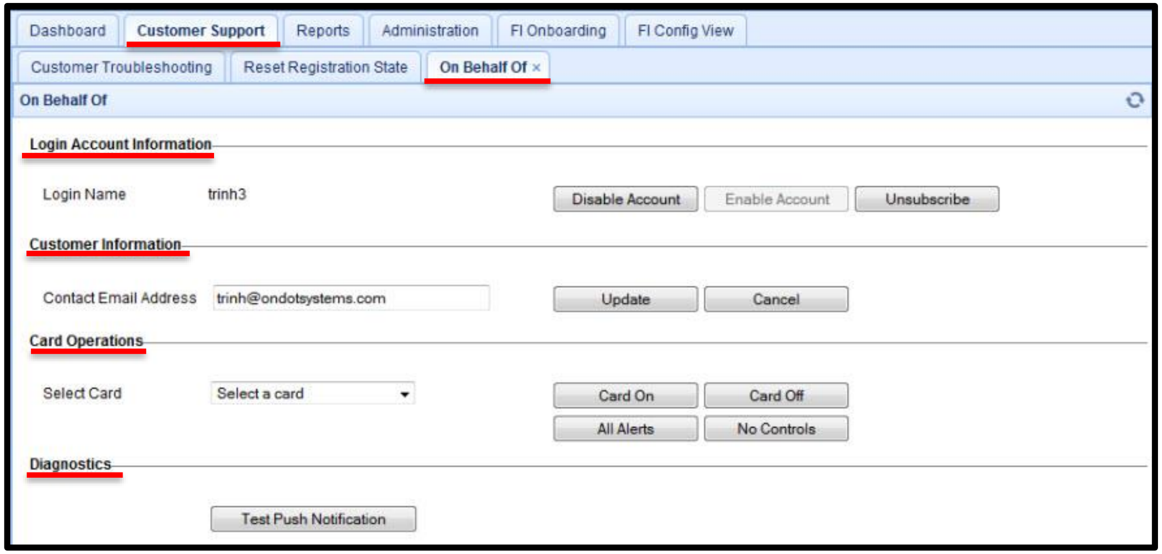


- Click on the "On Behalf Of" link on the Customer Search screen, or navigate to the Customer Support tab and then the On Behalf Of sub-tab.
- The On Behalf Of functionality allows an mConsole user to take action on behalf of the cardholder.
- A cardholder will receive a notification when a mConsole user takes action on their behalf.

Customer Support Tab

On Behalf Of Tab

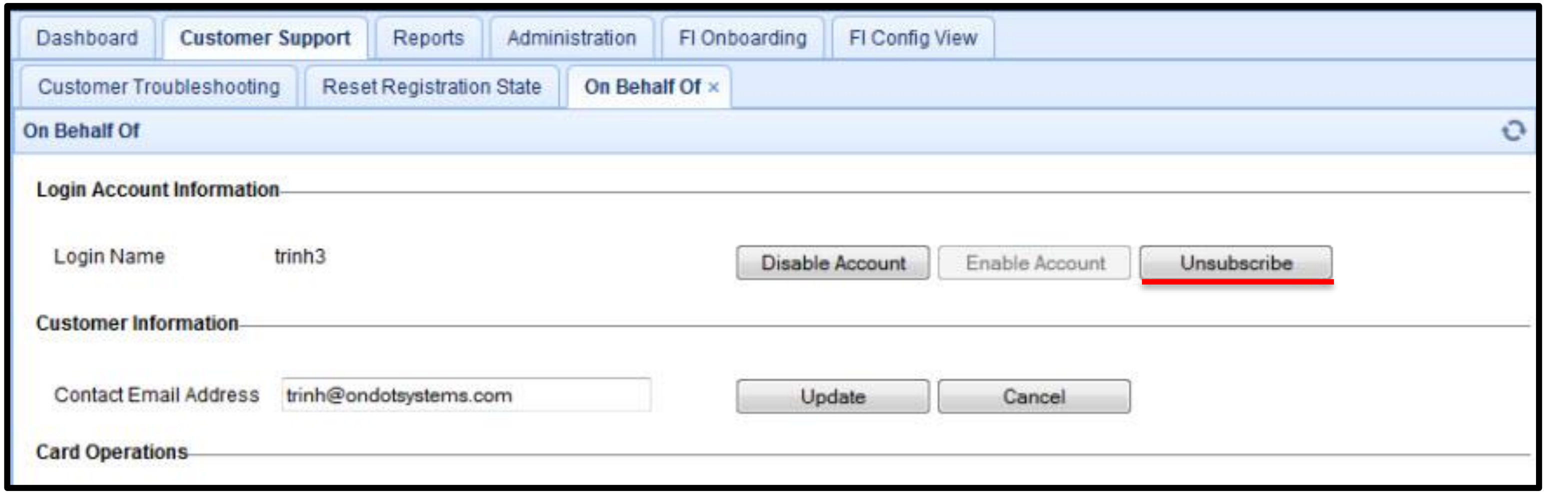
Options



The actions that an mConsole user can take on behalf of the cardholder are:

- Enable and disable an existing registered user's account. A user in a "Disabled" status will not be able to login to the mobile app.
- Update a user's email address that was created in the system. This email address is used by the app to send a forgotten password token to the cardholder.
- Turn "Card On" or "Card Off" for the user. When a card is turned off, all transactions made on the card will be declined.
- Enable all of the alerts ("All Alerts") associated with the card, all transactions will be approved based on the app settings.
- Selecting "No Controls" disables all controls the cardholder had previously set.
- Send a test push notification to the user's phone.

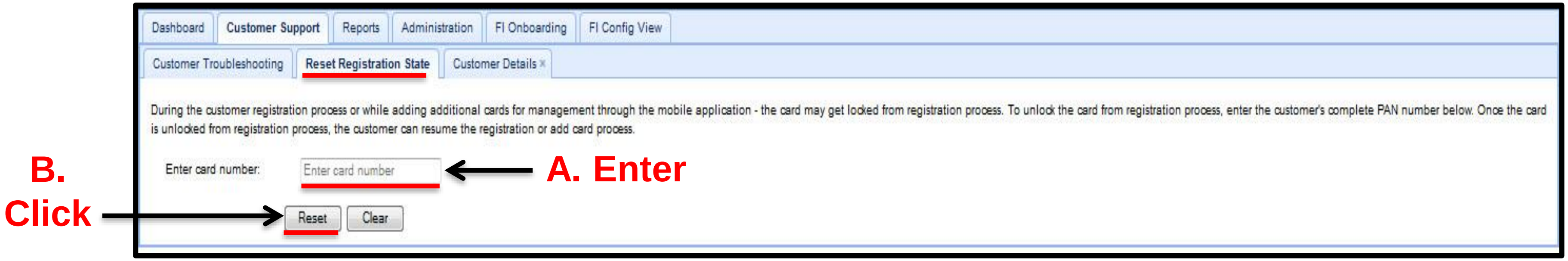
Customer Support Tab
On Behalf Of Tab



- **Unsubscribe the user from using the mobile app: the unsubscribed user will not be able to login to the app again; the card/user is not deleted from mConsole.**
- **If the user changes his/her mind and wants to use the app again later, the user will have to re-register.**
- **A FI must unsubscribe a cardholder from SecurLOCK™ Equip when closing the cardholder entry in the card processing system. There is no link between the two systems.**
- **No cardholder should ever be unsubscribed unless it is recommended by FIS, or if the purpose is to remove the cardholder because s/he no longer want to use the SecurLOCK Equip application.**

FIS

Customer Support Tab
Reset Registration State Tab

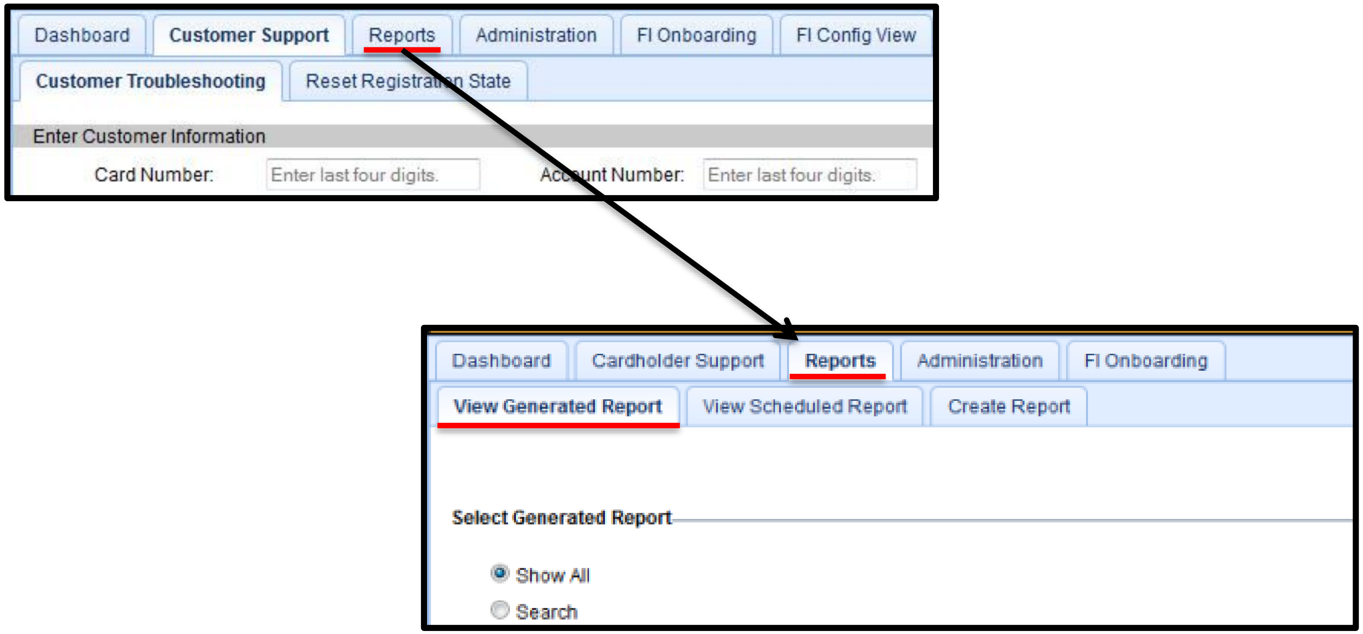


- **If a user enters incorrect authentication information three times consecutively, then the user will be locked out of the registration process for a period of 30 minutes.**
- **The financial institution can use the "Reset Registration State" tab to reset a card that has been locked out during registration.**
- **In order to do so, navigate to the "Customer Support" tab and then click on the "Reset Registration State" sub-tab.**
- **Enter card number and then click “Reset”.**

SecurLOCK™ Equip – mConsole Overview
Reports Tab

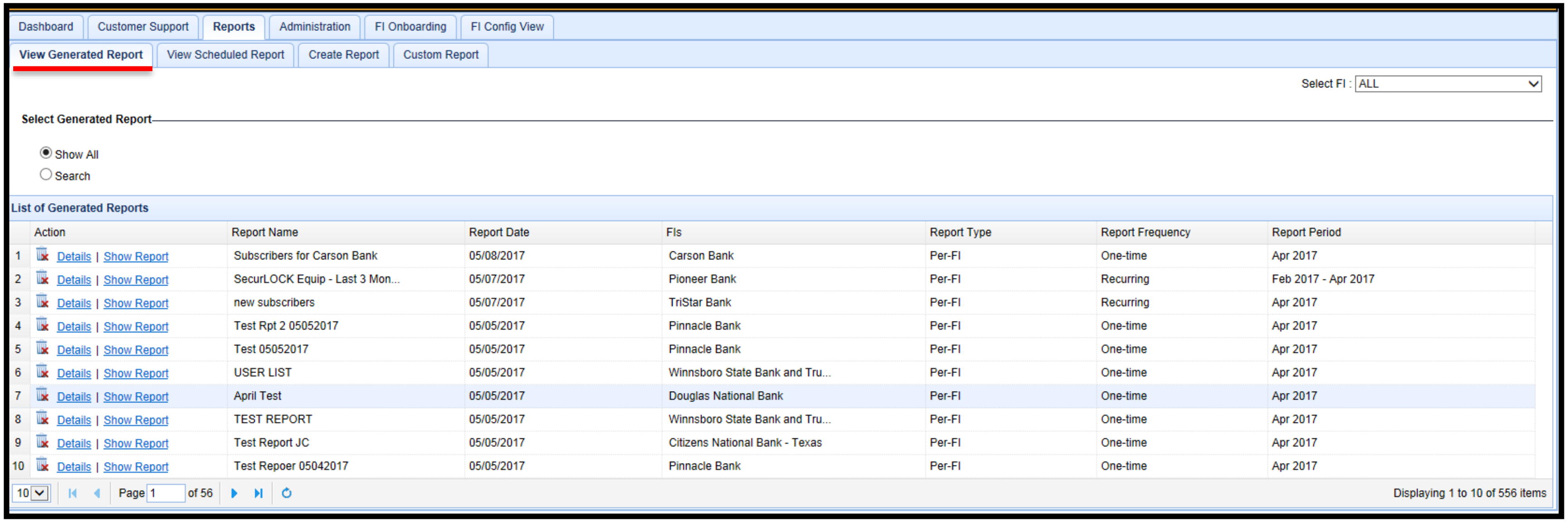
- **View Generated Report tab**
- **View Scheduled Report tab**
- **Create Report tab**

Reports Tab
View Generated Report Tab



- When clicking on the Reports tab, the user is taken to the "View Generated Report" sub-tab. This screen shows the one-time reports that have been generated for the processor or FI.

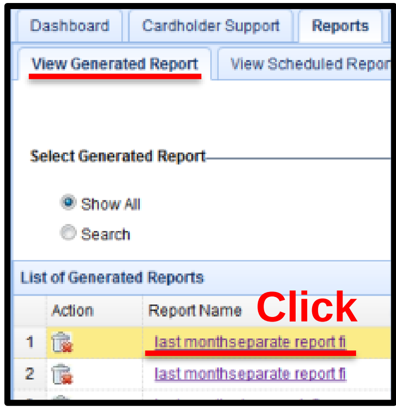
Reports Tab
View Generated Report Tab

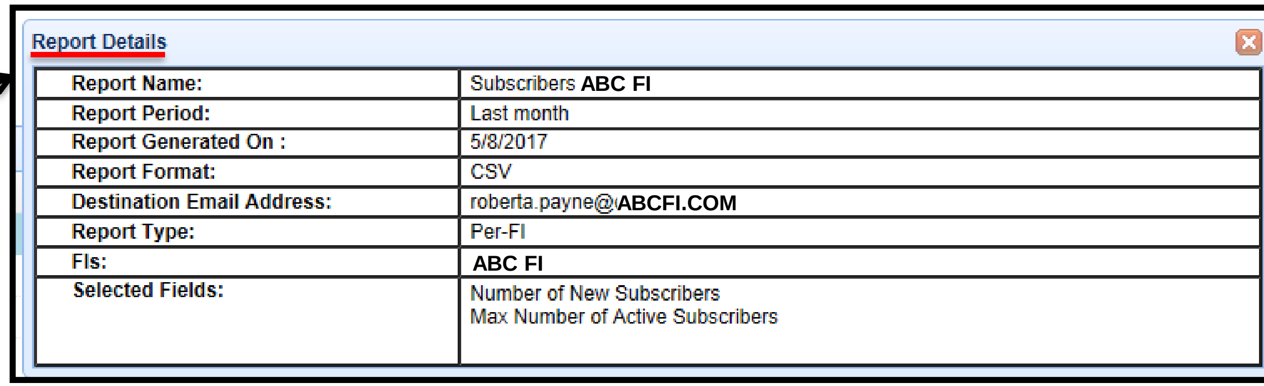


The reports shown in this list include:

- One-time immediate reports.
- Scheduled reports for which the scheduled execution date has occurred.
- Recurring reports with at least the first possible execution date passed. Use this option for repeating reports.

Reports Tab
View Generated Report Tab

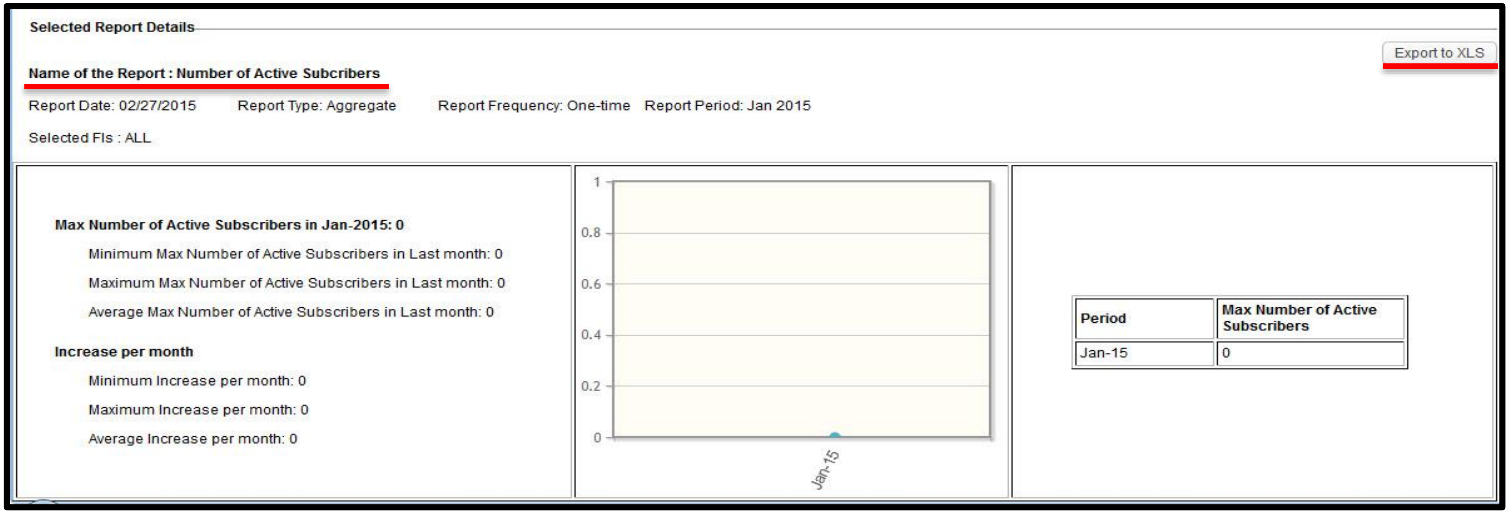




- When clicking on a Report Name, a screen is displayed which summarizes the information entered during the report creation process.
- The screen also expands to show the report data.

Reports Tab

View Generated Report Tab

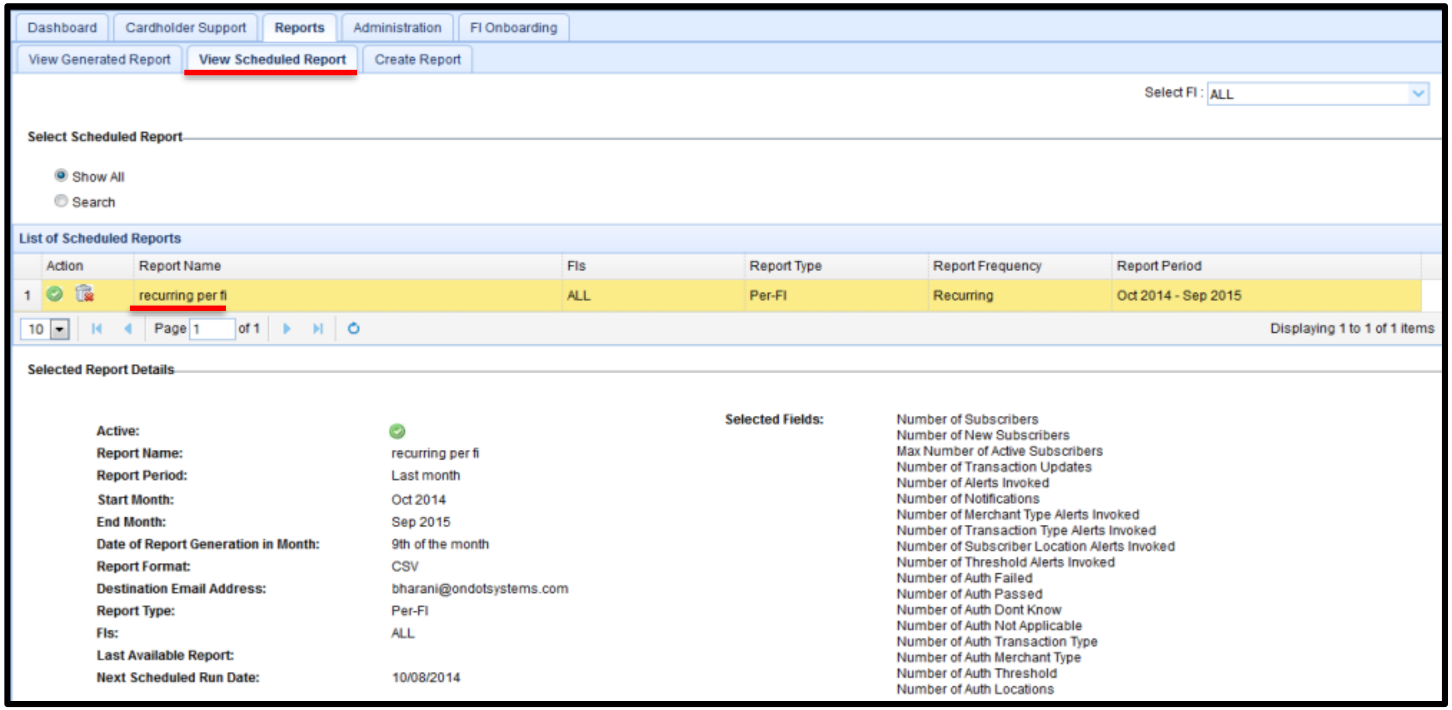


Click

- The report will display at the bottom of the screen.
- The mConsole user also has the capability to export reports to Excel.

Reports Tab

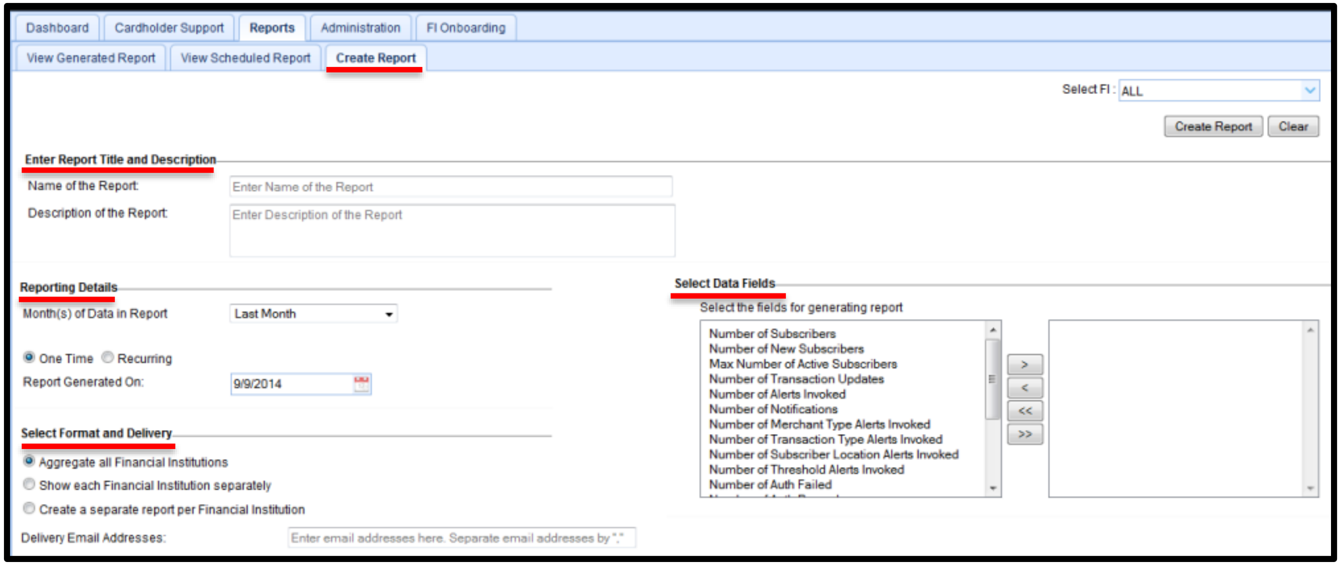
View Scheduled Report Tab – View Details



- **The "View Scheduled Report" tab shows all scheduled reports that have been created.**
- **On this screen, a user can see the report details, activate/ deactivate specific reports, and delete reports that are no longer needed.**

Reports Tab

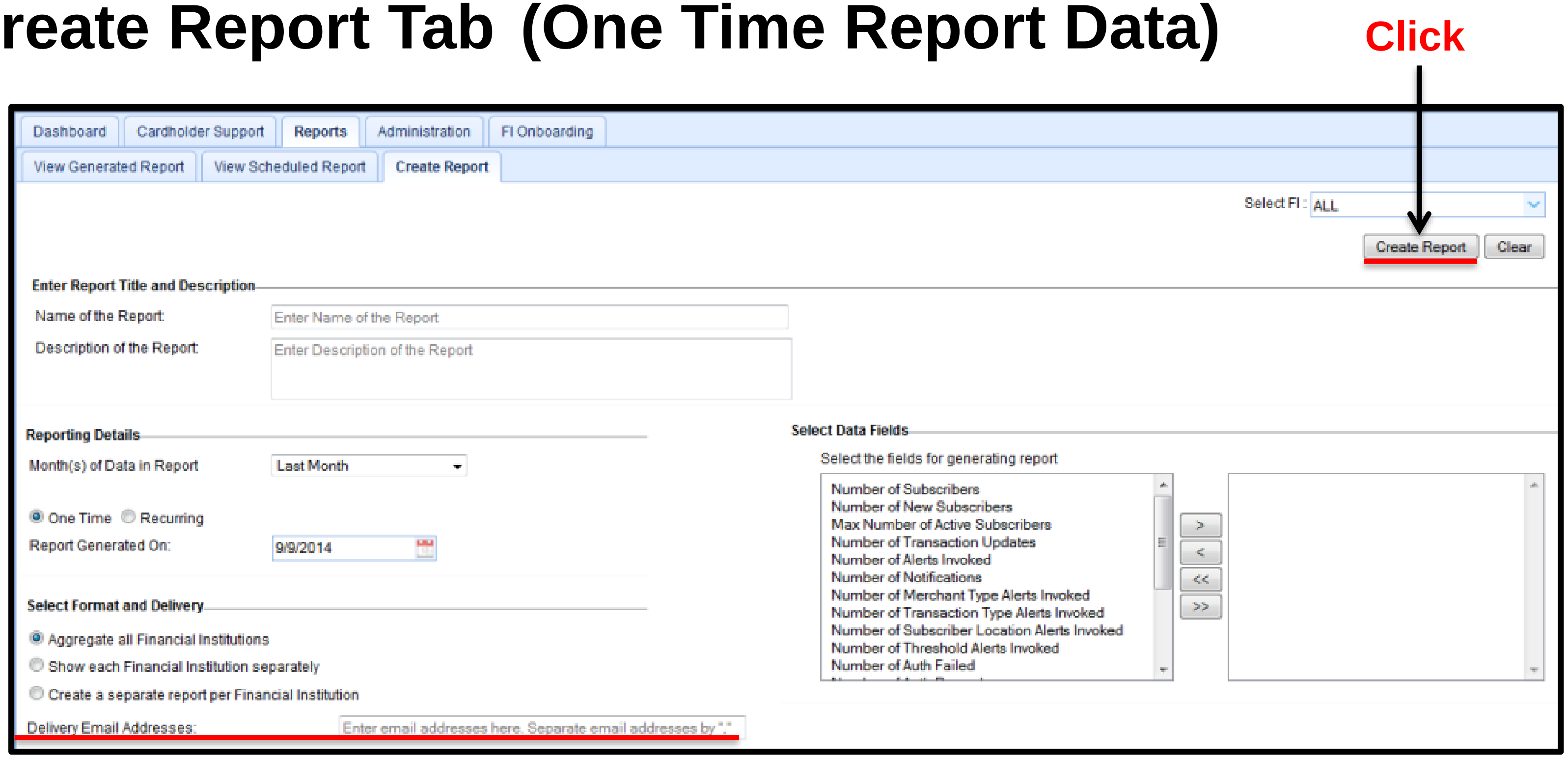
Create Report Tab (One Time Report Data)



- **The "Create Report" tab provides mConsole users the ability to create a single or recurring report.**
- **The user can specify:**
  - ➢ The name and time-frame of the report.
  - ➢ The data fields to be included in the report.
  - ➢ When the report is to be run.
  - ➢ The email address(es) that the report is to be sent to.

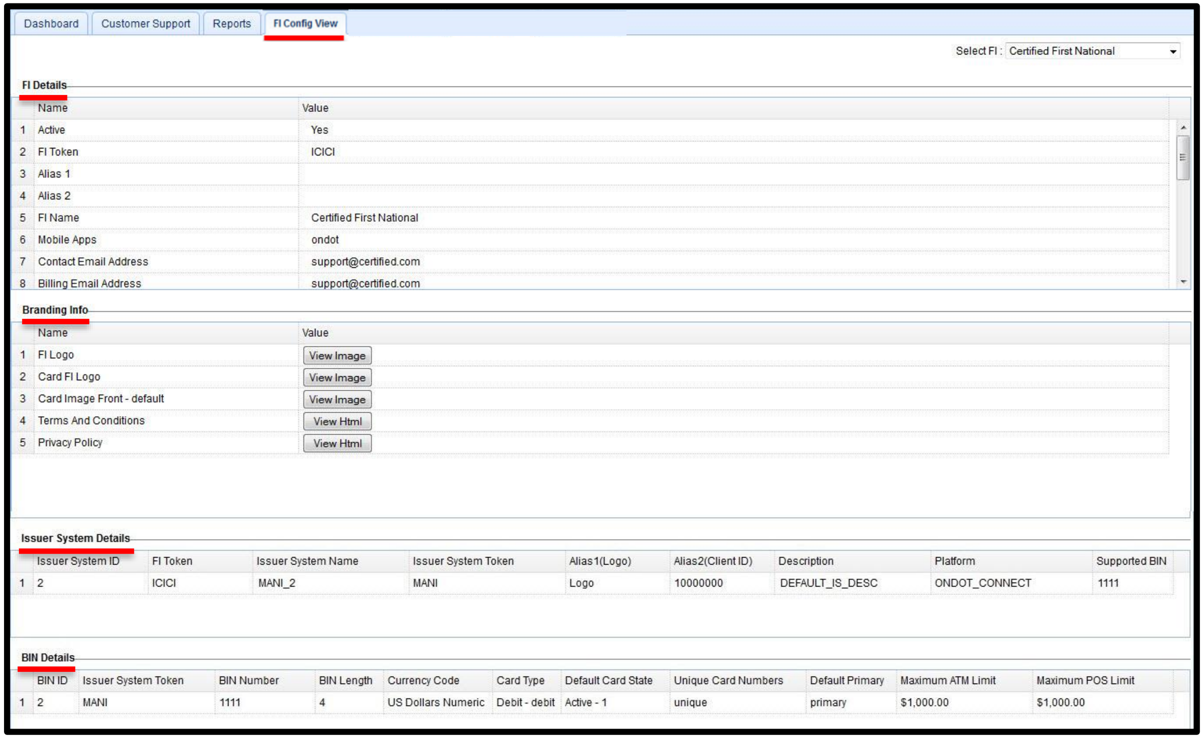
Reports Tab

Create Report Tab (One Time Report Data)



- After selecting the parameters and clicking "Create Report", a report will be generated as a ".csv" file and sent to the email address(es) you specify.
- There is no export data functionality.
- Once a recurring report is created, it cannot be generated or viewed from the View Scheduled Reports tab
- Reports remain on the system until they are deleted.

SecurLOCK™ Equip – mConsole Overview
Financial Institution Config View



- The FI Config View screen allows a financial institution's mConsole FI Admin users to view the configuration parameters that have been set up through the FI Onboarding tab.
- Only FI Admins can view information on this screen.

SecurLOCK™ Equip – mConsole Overview
Review

- **Access mConsole.**
- **Dashboard tab.**
- **Customer Support tab.**
- **Reports tab.**
- **Financial Institution Config View tab.**

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