Logging in

Before you can use the application you must identify yourself as a valid user by supplying a recognised email address and password. This process is called logging in and must be successfully completed before most of the application's functions can be used.

Until you have logged in, any attempt to access the application will direct you to the login page where you will be prompted to enter the email address and password associated with your account.

Once you have entered the login information click on the **Login** button and – assuming that you have supplied valid login values – you will be directed to the main menu. If the values which you have supplied are mistyped or otherwise invalid an error message will be displayed and you will be required to re-enter the login information.

If you make 6 successive attempts to login using invalid details your account will be locked. It will then be impossible to access the system until the account has been unlocked (which should happen automatically after 30 minutes have elapsed). The number of unsuccessful attempts and the unlock period are both liable to change and you can refer to the Account Policies page to view the operational values.

Tips

When you first log in, one of a series of tips will be displayed containing useful information helping you get the most out of the application and encouraging you to explore all of its features.

A different tip will be displayed each time you login, although you can disable this feature by un-checking the **Show tips at login** check-box at the bottom of the tips dialog. You can also disable and enable the tips feature using the **Show tips at login** account preference which is accessed using the [Account Preferences](#) page.

Additional login page options

The login page also contains a number of additional options which do not require you to login before accessing them.

- **Forgotten your password?**
  allows you to re-initialise a forgotten account password.
- **Register for a free test account**
  directs the user to the registration process for a test account.
- **Check the server status**
  displays the [current operational status](#) of each of the application servers.

Contact Support
initialises an email message with the contact address of the support team. (This option requires you to have a correctly configured email client on the computer which you are using to access the application)

Logging out

To prevent access to your account by unauthorised users it is recommended that you log out of the application when you are not using it. You can log out by selecting the Logout option from the menu (in which case you will be returned to the Login page in readiness for your next use of the application) or you can completely close your browser session.
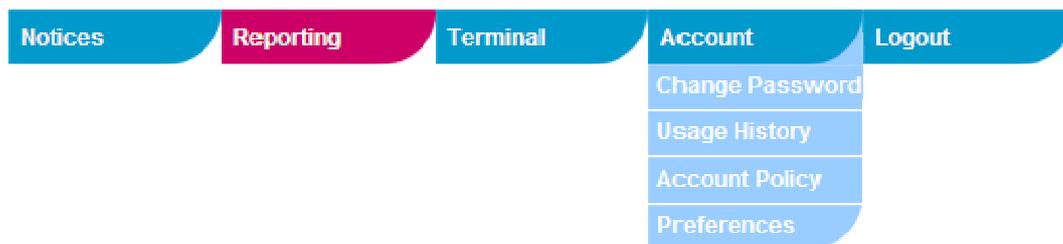
The application will automatically log out accounts if they are inactive for 15 minutes.

Using the menu

Most functions may be accessed using the menu. Once you have successfully logged in the menu is displayed at the top of every page The content of the menu will vary according to the configuration of your account, but a typical menu is shown below.

Notices	Reporting	Terminal	Account	Logout

Each top-level option in the menu may either access a function directly (such as the Terminal option which will display the Virtual Terminal page) or display a sub-menu of related options from which you may select a single option (such as the Account option which will display a sub-menu of all the account administration options). If you 'hover' the mouse over an option (that is, move the mouse over an option without clicking it) any sub-menu options will be displayed.

| Notices	Reporting	Terminal	Account	Logout
			Change Password	
			Usage History	
			Account Policy	
			Preferences	

The top-level option which is currently active (or which contains the sub-menu option which is currently active) is coloured red. In the examples shown above, it can be assumed that the currently active page is the reporting menu.

Using the application

The following general conventions apply throughout the application.

Required Values
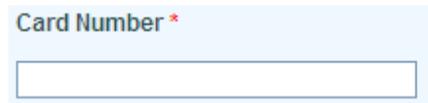
Card Number *

Many functions allow you to enter one or more values (for example, as Search Criteria in reports). Often these values may be left empty and the application will use a sensible default value. However, sometimes you are required to enter a value for a field. If this is the case, a red asterix * will be visible to the right of the field label. Wherever you see a red asterix, you should always supply a value for the corresponding field.

Help
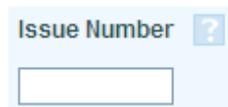
Issue Number

Most input fields have an associated help text which provides information about the purpose, format or range of permissible values for a field. You can access this help text by clicking the help icon to the right of the input field.

Entering Dates

To *

06/26/08

Dates should be entered in the format **mm/dd/yy**. For example, 28/12/1964. As an alternative to entering the date directly into the input field, you can also select the date interactively by clicking the calendar icon to the right of the input field. This will display a monthly calendar dialog where you can browse to and select the required date.
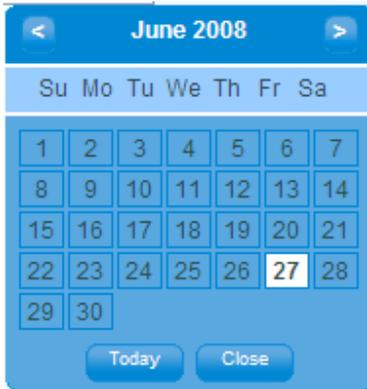
Date/Time Locality
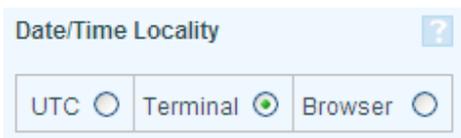
Since transactions and clients can span multiple time zones, some flexibility in searching and displaying times is necessary. For each transaction, the application records the date & time of submission as supplied by the originating terminal (**Terminal Time**) and also in Universal Coordinated Time (**UTC Time**). UTC is broadly equivalent to GMT and provides a worldwide time standard.

When you request a report, the application can use either of these times when searching for transactions and displaying the results.

The application also provides a third option, namely **Browser Time.** This is based on UTC Time but is adjusted to take account of your local time zone.

In general, wherever your report is expected to contain transactions from more than one time zone, you should select either the **UTC** or **Browser** options.

Resorting results

	Date/Time (Local)	Terminal Id	Terminal	Machine Reference	User Reference
?	▼				
	06/25/08 23:55:27	99960004	Demo Terminal 4		...67486
	06/25/08 23:48:57	99960003	Demo Terminal 3		...11930

Most reports allow you to resort the results. Where this is possible you will see a grey row beneath the column headings. In one of the cells within this row you will see a black arrow which indicates the column which is currently being used to sort the results. Clicking any other cell within this row will cause the results to be resorted according to the contents of the column to which the cell belongs and the position of the black arrow will be changed to reflect the new sort column. If you click the black arrow itself, the application will toggle the sort direction of the current sort column between ascending and descending.

Checking the server status

This may be accessed using the **Status** sub-option within the **Notices** menu option. Alternatively, it may be accessed directly from the login page. It is not necessary to be logged in to check server status.

The function may be used to check the operational status of each of the application servers. For each configured server, an icon is shown corresponding to the server's state. If the server is working correctly, the following image will be shown

Test Server
The server is operating correctly

but if the server is currently unavailable the following image will be shown

Bad Server 1
The server is currently unavailable

Reporting

The application offers extensive management information reporting functions with the following principal features;

- Detail and Summary transaction reporting.

- Reports may be filtered by a wide range of criteria including transaction date, card number, card scheme etc.

- Reports may be produced either online (in which case they will be generated immediately and viewed within the browser) or offline (in which case they will be submitted to a queue and generated in a portable spreadsheet format)

- The columns displayed in the report output may be customised to suit individual needs.

Reports may be scheduled to be run automatically at fixed intervals with results emailed securely to a nominated email address.

The reporting menu

All of the reporting functions may be accessed from the reporting menu page. Each of the available reports is presented in a series of grouped options.


If you select any of the pre-defined options (Today, Yesterday etc), the appropriate date range will be pre-selected and the results will be automatically displayed. If you select the **Manual Query** option you will be required to supply your own custom date range (as well as any other filter criteria) before the results will be generated.

if you click on the **More** option you will see additional pre-defined options.
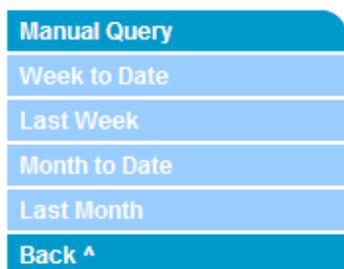
Click on the **Back** option to re-display the original pre-defined options.

The report functions which are available on this page are;

- [All Transactions](#)
  Displays all processed transactions.
- [Revenue Transactions](#)
  As **All Transactions**, but limited to Sale & Refund transactions which have been approved & committed.

- [Refund Transactions](#)

  As **All Transactions**, but limited to Refund transactions.
- [Pending Transactions](#)

  Displays Transactions which are pending commitment.
- [Client Summary](#)

  Displays all transactions summarised by Client.
- [Terminal Group Summary](#)

  Displays all transactions summarised by Terminal Group.
- [Terminal Summary](#)

  Displays all transactions summarised by Terminal.
- [Bank Submissions](#)

  Displays only those transactions which have been submitted to the bank.

Transaction report

The transaction report displays all transaction information recorded by the terminals linked to your account. You can access this report by clicking any option in the **All Transactions**, **Revenue Transactions** or **Refund Transactions** sections of the Reporting menu page. In the case of Revenue Transactions or Refund Transactions the standard transaction report will be displayed with certain filter criteria pre-selected to exclude unwanted transaction information.

If you selected any of the pre-defined date options all matching transactions will be automatically selected and displayed. The results are formatted as a paged report with each line corresponding to a single transaction.

Each page of information will contain a maximum of 10 transactions. To view subsequent or previous pages of information you should click on the page numbers (or the **Next** & **Previous** links) at the foot of the results. You can alter the number of transactions per page of results by selecting a new value in the **Page Length** drop down.

The number of matching transactions is displayed at the top of the results. A maximum of 100 rows will be displayed in an online query and if the results have been truncated the message *'First 100 results found (maximum)'* will be displayed. If you want to see the full set of results you should click the **Generate Report** button and the full results will be generated offline and you will be notified by email when they are ready.

The grey row beneath the column headings is the order row. By clicking any of the cells in this row you can re-sort the result set (by default the result set will be ordered by transaction date & time). The currently ordered column is indicated by a black arrow in the corresponding cell. By clicking on this arrow you can change the ordering of the column from ascending to descending (& vice versa).

Viewing expanded transaction information
Each row contains standard columns. If you want to see additional information for a

particular transaction you can click on the ☕ image in the leftmost column of each row. this will display the [Transaction Information](#) page in which all recorded information for the transaction is available. (Alternatively, you may use the column picker function to customise the columns which are displayed within the result set. This option is only available if you have set the [User Interface preference](#) to **Advanced**.)

Viewing other transactions for the same card
If you click on the value in any of the **Card Number** cells, the report will be redisplayed showing all other transactions recorded for that card within two weeks each side of the original transaction date.

Viewing the contents of the settlement batch.

If a transaction has been settled the Settled column will contain a link icon 🔗. Clicking on this icon will display the [Bank Submissions report](#) showing the entire contents of the batch.

Setting or modifying the search criteria

If you called the transaction report using the Manual Query option the Search Criteria will be visible. (You can also display the search criteria for a pre-defined report by clicking on the **Show Search Criteria** link) . You should set the search criteria if you want to construct your own manual query or if you want to further refine one of the pre-defined reports.

The search criteria are displayed within a tabbed interface. The exact appearance of these tabs will depend upon the configuration of your user preferences but a typical example is shown below.

The individual criteria are grouped in **Standard** and **Advanced** tabs. The Standard tab contains those search criteria which are most frequently used and the Advanced tab contains more specialised criteria. You can select either tab by clicking on the tab title.

All report queries must include at least a **From** and **To** date. If you invoke the transaction report using one of the pre-defined options then these values will already be populated but if you selected the **Manual Query** option you will be required to supply valid values for these fields. Other commonly used criteria on the Standard tab are the **Card Number** and the Transaction **Amount**. If you want to filter the results by a specific card you can enter either the whole card number or the first four digits and the last six digits separated by a space. You can also find only those transactions matching a specific amount by entering a decimal value into the Amount field (do not include a currency symbol). When you are satisfied that the search criteria are entered correctly you should click the **Search** button to generate and display the results.

The advanced tab contains additional search criteria.

The advanced search criteria are as follows. Enter or select values for any one or more of these fields to restrict the results so that only transactions which match the defined criteria are included.

- *Terminal Id*
  Enter a terminal id to restrict the results to a single terminal. Where supplied, the terminal id must be a 8 digit number. It is also possible to filter results by terminal using the Scope selection button.
- *Machine Reference*
  The machine reference is an arbitrary string associated with the terminal configuration which is used to maintain a client-defined reference to the terminal.
- *User Reference*
  The user reference is an arbitrary string optionally supplied with each transaction.
- *Transaction Reference*
  The unique reference associated with this transaction generated by CardEaseXML. This should be in GUID format.
- *Authorisation Code*
  The authorisation code returned by the acquiring bank for the transaction.
- *Scope*

Clicking the scope button will open a dialog in which all the terminals associated with you account are organised in terminal groups in a treeview layout. See [Selecting Clients, Terminal Groups and Terminals using Scope](#) for more information.

- *Card Scheme*
  is the card scheme associated with the card making the transaction. Clicking within this field will open a drop-down list in which all defined card schemes are listed. To include transactions for one or more card schemes in your report, click on the check-box associated with each required card scheme. You can globally include or exclude card schemes using the **Select All** & **Deselect All** buttons. In the absence of a specific selection for this field all card schemes will be included.

- *Currency*
  is the currency of the transaction. Clicking within this field will open a drop-down list in which all defined currencies are listed. To include transactions for one or more currencies in your report, click on the check-box associated with each required currency. You can globally include or exclude currencies using the **Select All** & **Deselect All** buttons. In the absence of a specific selection for this field all currencies will be included.

- *Subset*
  defines the type of transactions which will be included in the report. Click anywhere in this control to show a list of available subset types from which you may select a single value. If you select either a Revenue or a Refund report from the reporting menu this field will automatically be pre-populated with the appropriate subset value.

- *Card Reference*
  defines the unique identifier of the card associated with the transaction which is assigned by CardEaseXml. This should be in GUID format.

In addition to search criteria which alter the set of the transactions which will be included in the results, the Advanced tab also includes a number of other options which change the way in which information is displayed. These are;

- *Date/Time Locality*
  changes the type of date/time used. For a full discussion of this option refer to [Using the application (Date/Time Locality)](#)

- *Initial Order*
  by default the transaction report will be initially ordered by transaction date/time. You can change the initial order of the report by selecting an alternative column from this drop down list. You may also define whether the column is to be ordered in ascending or descending order.

- *Report Name*
  defines the name associated with the report if generated as an offline report. For a fuller discussion of this field please refer to [Offline Reports](#)

Pending transaction report

The Pending transaction report displays all information for all uncommitted transactions recorded by terminals linked to your account. You can access this report by clicking any option in the **Pending Transactions** sections of the Reporting menu page.

If you selected any of the pre-defined date options all matching pending transactions will be automatically selected and displayed. The results are formatted as a paged report with each line corresponding to a single transaction.

	Date/Time (UTC)	Terminal Id	Terminal	Address Result	Zip Code Result	CVV Result	3D Secure Enrolled	3D Secure Status	Fraud Profiling	Type	Amount	Void	Commit
	▼												
	06/25/08 12:54:31	Demo Terminal 3	Demo Terminal 3				—	—		Authorisation	£8.58		
	06/25/08 12:39:46	Demo Terminal 2	Demo Terminal 2							Authorisation	£54.89		
	06/25/08 12:37:57	Demo Terminal 1	Demo Terminal 1							Authorisation	£90.52		
	06/25/08 12:25:03	Demo Terminal 1	Demo Terminal 1			✓	✓	—		Authorisation	£51.38		
	06/25/08 12:17:55	Demo Terminal 3	Demo Terminal 3			✓				Authorisation	£54.49		
	06/25/08 12:05:08	Demo Terminal 2	Demo Terminal 2							Authorisation	£48.36		
	06/25/08 11:55:24	Demo Terminal 3	Demo Terminal 3							Authorisation	£93.48		
	06/25/08 11:47:42	Demo Terminal 1	Demo Terminal 1							Authorisation	£55.14		
	06/25/08 11:40:34	Demo Terminal 1	Demo Terminal 1							Authorisation	£72.90		
	06/25/08 11:29:43	Demo Terminal 4	Demo Terminal 4				—	—		Authorisation	£67.08		

70 results found   Page length 10   Generate Report

Pages | Previous 1 2 3 4 5 6 7 Next

Each page of information will contain a maximum of 10 pending transactions. To view subsequent or previous pages of information you should click on the page numbers (or the **Next** & **Previous** links) at the foot of the results. You can alter the number of pending transactions per page of results by selecting a new value in the **Page Length** drop down.

The number of matching pending transactions is displayed at the top of the results. A maximum of 100 rows will be displayed in an online query and if the results have been truncated the message *'First 100 results found (maximum)'* will be displayed. If you want to see the full set of results you should click the **Generate Report** button and the full results will be generated offline and you will be notified by email when they are ready.

The grey row beneath the column headings is the order row. By clicking any of the cells in this row you can re-sort the result set (by default the result set will be ordered by transaction date & time). The currently ordered column is indicated by a black arrow in the corresponding cell. By clicking on this arrow you can change the ordering of the column from ascending to descending (& vice versa).

Each row contains standard columns. If you want to see additional information for a particular transaction you can click on the image in the leftmost column of each row. this will display the [Transaction Information](#) page in which all recorded information for

the transaction is available. (Alternatively, you may use the column picker function to customise the columns which are displayed within the result set. This option is only available if you have set the User Interface preference to **Advanced**.)
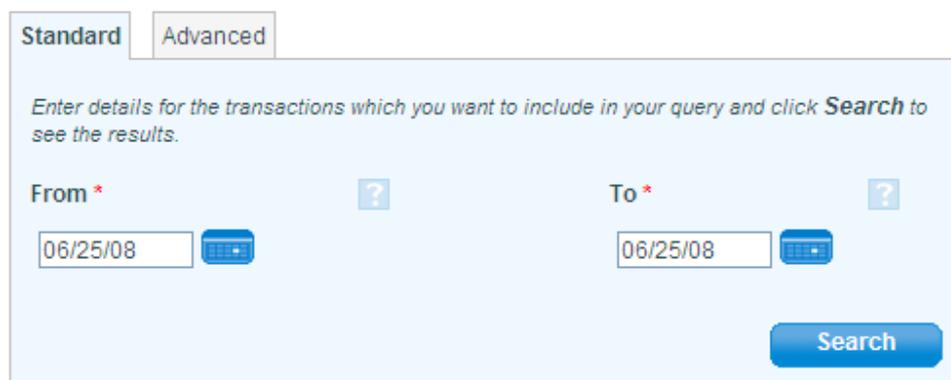
Committing & Voiding Pending Transactions

In addition to the standard data columns the rightmost columns of each row contain icons to Void or to Commit the corresponding transaction. Click on either of these icons to access the corresponding function. It is not possible to hide these icons using the column picker.

Setting or modifying the search criteria

If you called the transaction report using the Manual Query option the Search Criteria will be visible. (You can also display the search criteria for a pre-defined report by clicking on the **Show Search Criteria** link) . You should set the search criteria if you want to construct your own manual query or if you want to further refine one of the pre-defined reports.

The search criteria are displayed within a tabbed interface. The exact appearance of these tabs will depend upon the configuration of your user preferences but a typical example is shown below.

The individual criteria are grouped in **Standard** and **Advanced** tabs. The Standard tab contains those search criteria which are most frequently used and the Advanced tab contains more specialised criteria. You can select either tab by clicking on the tab title.

All report queries must include at least a **From** and **To** date. If you invoke the transaction report using one of the pre-defined options then these values will already be

populated but if you selected the **Manual Query** option you will be required to supply valid values for these fields. When you are satisfied that the search criteria are entered correctly you should click the **Search** button to generate and display the results.

The advanced tab contains additional search criteria.

The advanced search criteria are as follows. Enter or select values for any one or more of these fields to restrict the results so that only transactions which match the defined criteria are included.

- *Terminal Id*
  Enter a terminal id to restrict the results to a single terminal. Where supplied, the terminal id must be a 8 digit number. It is also possible to filter results by terminal using the Scope selection button.
- *Machine Reference*
  The machine reference is an arbitrary string associated with the terminal configuration which is used to maintain a client-defined reference to the terminal.
- *User Reference*
  The user reference is an arbitrary string optionally supplied with each transaction.
- *Transaction Reference*
  The unique reference associated with this transaction generated by CardEaseXML. This should be in GUID format.
- *Authorisation Code*

The authorisation code returned by the acquiring bank for the transaction.

- *Scope*
  Clicking the scope button will open a dialog in which all the terminals associated with you account are organised in terminal groups in a treeview layout. See [Selecting Clients, Terminal Groups and Terminals using Scope](#) for more information.
- *Card Reference*
  defines the unique identifier of the card associated with the transaction which is assigned by CardEaseXml. This should be in GUID format.

In addition to search criteria which alter the set of the transactions which will be included in the results, the Advanced tab also includes a number of other options which change the way in which information is displayed. These are;

- *Date/Time Locality*
  changes the type of date/time used. For a full discussion of this option refer to [Using the application (Date/Time Locality)](#)
- *Initial Order*
  by default the pending transaction report will be initially ordered by transaction date/time. You can change the initial order of the report by selecting an alternative column from this drop down list. You may also define whether the column is to be ordered in ascending or descending order.

Report Name
defines the name associated with the report if generated as an offline report. For a fuller discussion of this field please refer to [Offline Reports](#)

Viewing Transaction Information

You can view transaction information by clicking the 🖼 image which is the leftmost cell of each row of a [Transaction](#) or [Pending Transaction](#) report.

The transaction information is arranged in categories of related information. Each of these categories may be individually expanded or hidden. When a transaction is first displayed only the **References** category is fully visible – for all the others only the category name is visible.

To expand a category click anywhere within the dark blue category name. Clicking within the category name when the category is already expanded will cause it to contract and be hidden.

You can expand all the categories in one action by clicking the ⊞ image in the top right corner of the grid. Similarly, you can collapse all the categories by clicking the ⊟ image.

The categories which are displayed (and the exact composition of the fields contained by each category) will vary from transaction to transaction because of the differing types of information which may be recorded for each.

Committing, Voiding and Refunding transactions

In addition to viewing the transaction information, you can also use this page to void or commit uncommitted transactions and to refund committed transactions. When any of these actions are available corresponding buttons will be visible at the top of the page.

For an uncommitted transaction...

...or for a committed transaction
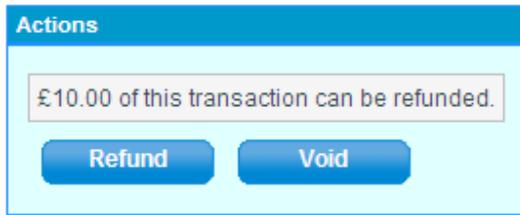
Note that for a committed transaction the total amount available for refund is displayed. To select any of these actions click the corresponding button. You will be asked to confirm the action and – in the case of a refund to supply the amount which is to be refunded.

Summary Reports

WebMIS provides three reports which summarise transaction information; the **Client**, **Terminal Group** and the **Terminal** summary reports. These reports all present a similar interface and will be described together.

The reports differ in the level of aggregation which they impose. Each report will show a single row for each Client (or Terminal Group or Terminal, depending on the report selected) which is associated with your account. If any row contains transactions in more than currency, then the amounts for each currency will be split and separate rows will be displayed.

A row for each Client (Terminal Groups or Terminal) which is configured onto your account will be displayed. The leftmost column in each row will contain a description of the summarised item. This will be a client name, a terminal group description or a terminal id/description depending on the report selected. The remaining columns will contain daily aggregated transaction values for the summarised item and a total for all days. The number of daily columns displayed will vary according to the date range which you have selected.

Example #1 – Weekly Client Summary

2 results found

20 Jun - 26 Jun   Page length 10

Client	20 Jun	21 Jun	22 Jun	23 Jun	24 Jun	25 Jun	26 Jun	Total
Demo Client 1	£ 3447.40	£ 5574.80	£ 3586.55	£ 3909.71	£ 4620.49	£ 4402.81	£ 1562.51	£ 27104.27
Demo Client 2	£ 4405.20	£ 3730.82	£ 5571.59	£ 5338.95	£ 4343.89	£ 3844.65	£ 1854.82	£ 29089.92

Pages | Previous **1** Next

Example #2 – Daily Terminal Group Summary

2 results found

20 Jun   Page length 10   Generate

Client	Terminal Group	20 Jun	Total
Demo Client 1	Demo Group 1	£ 1604.55	£ 1604.55
Demo Client 1	Demo Group 2	£ 1842.85	£ 1842.85

Pages | Previous **1** Next

Example #3 – Two day Terminal Summary

4 results found

25 Jun - 26 Jun   Page length 10   Generate

Terminal	25 Jun	26 Jun	Total
99960001 - Demo Terminal 1	£ 2054.40	£ 892.89	£ 2947.29
99960002 - Demo Terminal 2	£ 2348.41	£ 669.62	£ 3018.03
99960003 - Demo Terminal 3	£ 1865.04	£ 979.01	£ 2844.05
99960004 - Demo Terminal 4	£ 1979.61	£ 875.81	£ 2855.42

Pages | Previous **1** Next

By hovering the mouse cursor over any value cell, a tooltip will appear containing the number of summarised transactions and the average spend.

Each page of information will contain a maximum of 10 summarised items. To view subsequent or previous pages of information you should click on the page numbers (or the **Next** & **Previous** links) at the foot of the results. You can alter the number of transactions per page of results by selecting a new value in the **Page Length** drop down.

The number of matching items is displayed at the top of the results. A maximum of 100 rows will be displayed in an online query and if the results have been truncated the message *'First 100 results found (maximum)'* will be displayed. If you want to see the full set of results you should click the **Generate Report** button and the full results will be generated offline and you will be notified by email when they are ready.

A maximum of 7 days can be displayed on each page. If the date range which you have defined exceeds 7 days, you can scroll between adjacent 7 days blocks using the **Show previous 7 days** and **Show next 7 days** links at the bottom right of the results grid. Note that the Total column will always show the total for the *entire* date range.

2 results found								
01 May - 31 May						Page length 10		Generate
Client	**08 May**	**09 May**	**10 May**	**11 May**	**12 May**	**13 May**	**14 May**	**Total**
Demo Client 1	£ 4682.40	£ 4992.17	£ 3649.65	£ 4273.85	£ 4380.09	£ 4954.10	£ 3475.47	£ 137080.29
Demo Client 2	£ 4204.83	£ 3646.43	£ 4919.44	£ 3926.19	£ 4827.07	£ 4830.60	£ 4381.34	£ 133310.34

Pages | Previous **1** Next   Show previous 7 days Show next 7 days

Setting or modifying the search criteria

If you called the summary report using the Manual Query option the Search Criteria will be visible. (You can also display the search criteria for a pre-defined report by clicking on the **Show Search Criteria** link) . You should set the search criteria if you want to construct your own manual query or if you want to further refine one of the pre-defined reports.

The search criteria are displayed within a tabbed interface. The exact appearance of these tabs will depend upon the configuration of your user preferences but a typical example is shown below.

The individual criteria are grouped in **Standard** and **Advanced** tabs. The Standard tab contains those search criteria which are most frequently used and the Advanced tab contains more specialised criteria. You can select either tab by clicking on the tab title.

All report queries must include at least a **From** and **To** date. If you invoke the summary report using one of the pre-defined options then these values will already be populated but if you selected the **Manual Query** option you will be required to supply valid values for these fields. When you are satisfied that the search criteria are entered correctly you should click the **Search** button to generate and display the results.

The advanced tab contains additional search criteria.

The advanced search criteria are as follows. Enter or select values for any one or more of these fields to restrict the results so that only transaction information which matches the defined criteria are included.

- *Scope*
  Clicking the scope button will open a dialog in which all the terminals associated with your account are organised in terminal groups in a treeview layout. See Selecting Clients, Terminal Groups and Terminals using Scope for more information.
- *Currency*
  is the currency of the transactions to be included. Clicking within this field will open a drop-down list in which all defined currencies are listed. To include transactions for one or more currencies in your report, click on the check-box associated with each required currency. You can globally include or exclude currencies using the **Select All** & **Deselect All** buttons. In the absence of a specific selection for this field

all currencies will be included.

- *Subset*
  defines the type of transactions which will be included in the report. Click anywhere in this control to show a list of available subset types from which you may select a single value. If you select either a Revenue or a Refund report from the reporting menu this field will automatically be pre-populated with the appropriate subset value.
- *Only show enabled items*
  defines whether all clients, groups or terminals should be included in the report regardless of their state (which is the default) or whether the report should be restricted to currently enabled items, excluding test or disabled items.

In addition to search criteria which alter the set of the transactions which will be included in the results, the Advanced tab also includes a number of other options which change the way in which information is displayed. These are;

- *Date/Time Locality*
  changes the type of date/time used. For a full discussion of this option refer to Using the application (Date/Time Locality)
- *Report Name*
  defines the name associated with the report if generated as an offline report. For a fuller discussion of this field please refer to Offline Reports

Linking Summary Reports

The summary reports are linked hierarchically so that may drill down from a Client summary to a Terminal Group summary and thence to a Terminal summary. To drill down from a summary report to the lower level you can either;

- click on the description of the summarised item – the child report will contain information for the clicked item over the entire date range of the parent report.

click on one of the transaction amount cells – the child report will contain information for the clicked item but only for the single day indicated by the clicked cell.

Bank submissions report

The bank submission report shows the number and value of your transactions which have been submitted to the bank, summarised at the daily level.You can access this report by clicking any option in the **Bank Submissions** section of the Reporting menu page.

If you selected any of the pre-defined date options all matching submissions will be automatically selected and displayed. The results are formatted as a paged report with each line corresponding to a single day.

7 results found

	Date/Time (Local)	Merchant Reference	Count	Amount
?	▼			
	06/27/08 09:00:00	TST_STANDARD	52	£1943.92
	06/26/08 09:00:00	TST_STANDARD	46	£2307.79
	06/25/08 09:00:00	TST_STANDARD	40	£2001.32
	06/24/08 09:00:00	TST_STANDARD	48	£2098.52
	06/23/08 09:00:00	TST_STANDARD	45	£2320.12
	06/22/08 09:00:00	TST_STANDARD	45	£2358.51
	06/21/08 09:00:00	TST_STANDARD	41	£1918.22

Pages | Previous **1** Next

Each page of information will contain a maximum of 10 rows. To view subsequent or previous pages of information you should click on the page numbers (or the **Next** & **Previous** links) at the foot of the results.
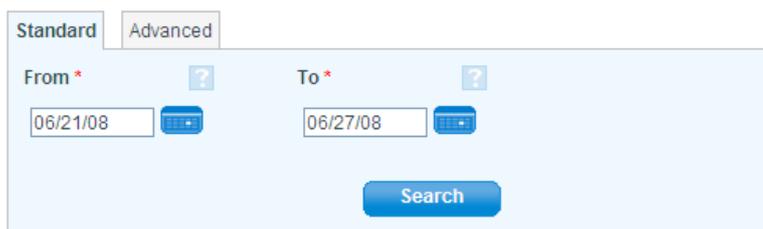
The grey row beneath the column headings is the order row. By clicking any of the cells in this row you can re-sort the result set (by default the result set will be ordered by transaction date & time). The currently ordered column is indicated by a black arrow in the corresponding cell. By clicking on this arrow you can change the ordering of the column from ascending to descending (& vice versa).

Each row corresponds to a batch of settled transactions and the number and total value of the transactions is displayed. If you click on the card icon in the leftmost column the application will drill down and display all the individual transactions for the current client within the selected batch (see below).

Setting or modifying the search criteria

If you called the report using the Manual Query option the Search Criteria will be visible. (You can also display the search criteria for a pre-defined report by clicking on the **Show Search Criteria** link) . You should set the search criteria if you want to construct your own manual query or if you want to further refine one of the pre-defined reports.

The search criteria are displayed within a tabbed interface. The exact appearance of these tabs will depend upon the configuration of your user preferences but a typical example is shown below.

The individual criteria are grouped in **Standard** and **Advanced** tabs. The Standard tab contains those search criteria which are most frequently used and the Advanced tab contains more specialised criteria. You can select either tab by clicking on the tab title.

All report queries must include at least a **From** and **To** date. If you invoke the Bank Submissions report using one of the pre-defined options then these values will already be populated but if you selected the **Manual Query** option you will be required to supply valid values for these fields.

The advanced tab contains additional search criteria.

The advanced search criteria are as follows. Enter or select values for any one or more of these fields to restrict the results so that only transactions which match the defined

criteria are included.

- *Terminal Id*
  Enter a terminal id to restrict the results to a single terminal. Where supplied, the terminal id must be a 8 digit number. It is also possible to filter results by terminal using the Scope selection button.
- *Machine Reference*
  The machine reference is an arbitrary string associated with the terminal configuration which is used to maintain a client-defined reference to the terminal.
- *Scope*
  Clicking the scope button will open a dialog in which all the terminals associated with you account are organised in terminal groups in a treeview layout. See Selecting Clients, Terminal Groups and Terminals using Scope for more information.

In addition to search criteria which alter the set of the transactions which will be included in the results, the Advanced tab also includes a number of other options which change the way in which information is displayed. These are;

- *Date/Time Locality*
  changes the type of date/time used. For a full discussion of this option refer to Using WebMIS (Date/Time Locality)

Viewing Batch Contents

|	Date/Time (Local)	Merchant Reference	Card Scheme	Type	Count	Amount
	▼					
	06/30/08 09:00:00	TST_STANDARD	Visa	Authorisation [Credit]	11	£533.32
	06/30/08 09:00:00	TST_STANDARD	MasterCard	Authorisation [Credit]	19	£1282.21
	06/30/08 09:00:00	TST_STANDARD	Maestro	Authorisation [Credit]	10	£483.99
	06/30/08 09:00:00	TST_STANDARD	Amex	Authorisation [Credit]	3	£47.25
	06/30/08 09:00:00	TST_STANDARD	JCB	Authorisation [Credit]	3	£100.95
	06/30/08 09:00:00	TST_STANDARD	Diners	Authorisation [Credit]	4	£300.01
	06/30/08 09:00:00	TST_STANDARD	Discover	Authorisation [Credit]	4	£223.90

Pages | Previous **1** Next

By drilling down from the Summary Report the user may view the contents of the batch. Each row represents the total count and value of transactions summarised by Card Scheme. The user may drill down to the individual transaction level by clicking on the card icon 💳 in the leftmost column and the Transaction Report will be displayed showing the individual transactions.

Selecting clients, terminal groups and terminals using scope

Scope is one of the search criteria available on the Advanced tab of all the standard reports. It allows you to visually select combinations of terminal, terminal group and client to be included in the report results. In general, the use of Scope Selection is more suited to more complex accounts which have been configured with multiple terminal groups or terminals.

You activate scope selection by clicking on the Scope button. The application will then display a dialog showing all the Clients, Terminal Groups and Terminals associated with your account in a hierarchical treeview format.
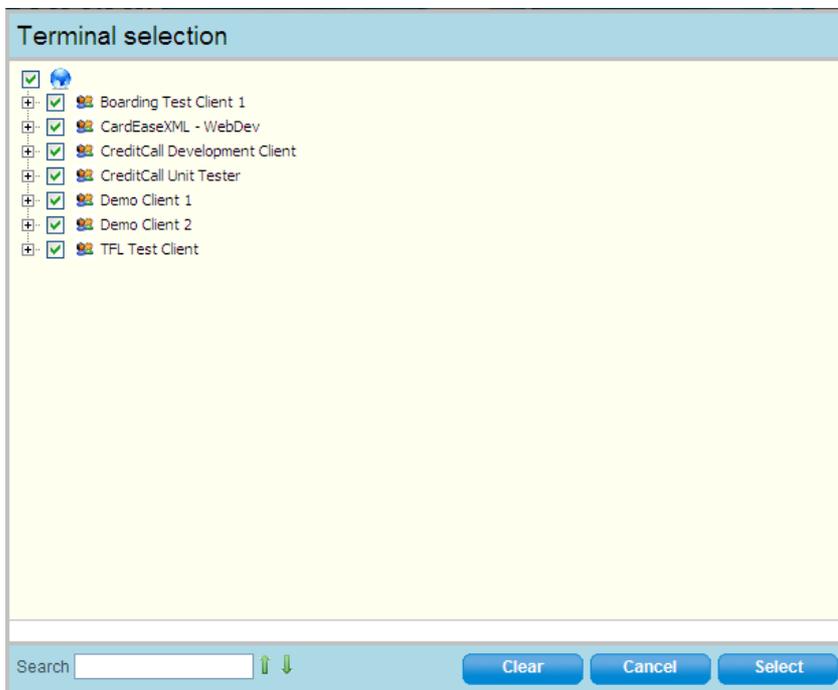
Initially only the top level of the tree (Clients) are displayed. You can display the terminal groups associated with a particular Client by clicking the plus icon in the corresponding row.
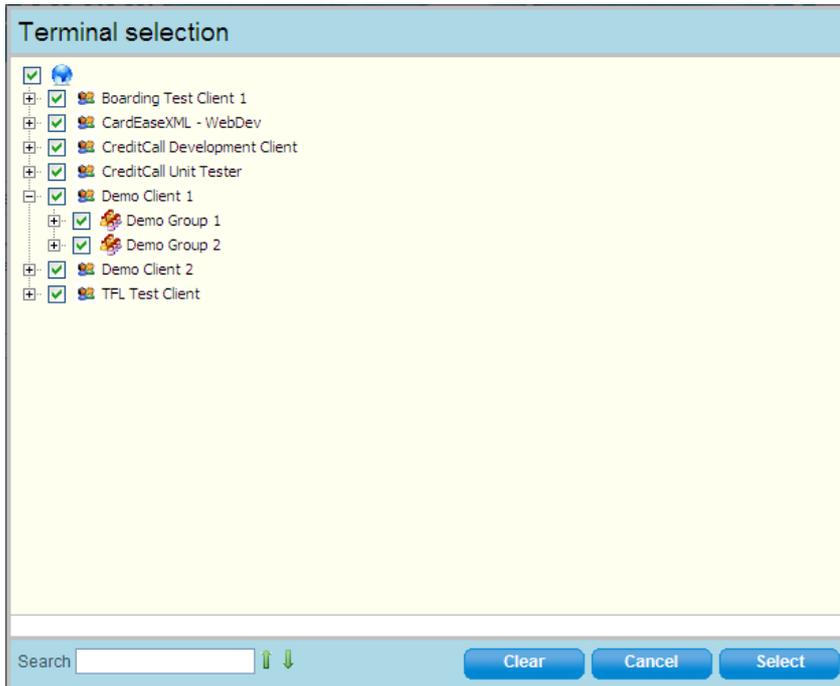
You can then display the terminals associated with a specific terminal group by clicking on the corresponding plus icon.
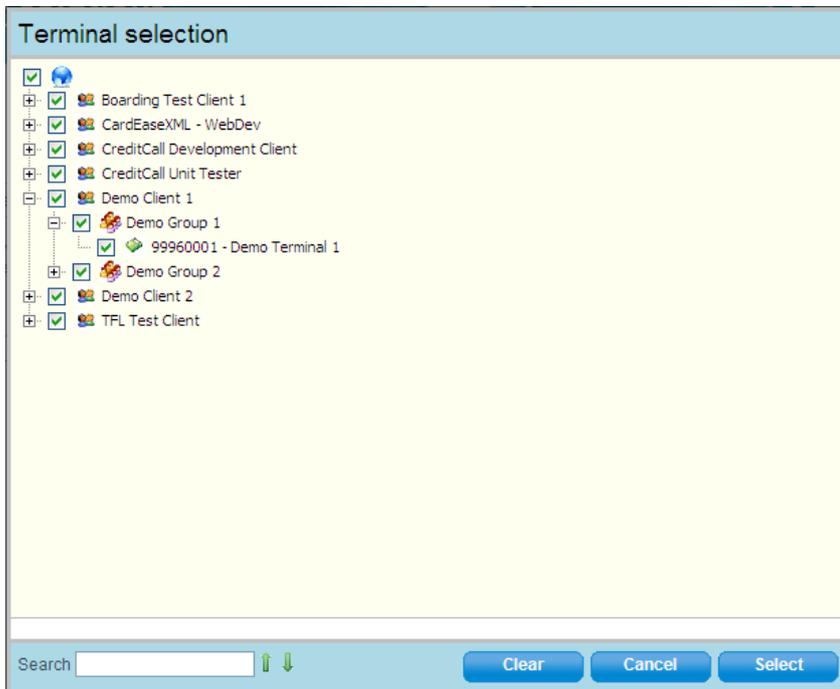

By checking or un-checking the check-boxes displayed on each row you can exclude or include any combination of clients, terminal groups and terminals. When you include or

exclude any item in the tree all the nodes within the selected item will also be included or excluded. Clicking the **Clear** button will unselect all items in the tree (the same may be achieved by clicking on the globe icon at the top of the tree). To accept your selection and return to the report click on the **Select** button or – if you want to abandon the current selection before returning to the report – click the **Cancel** button.

Note – if you are using the <u>Client Summary or Terminal Group Summary</u> reports you may only select nodes at or above the level of the selected report. For instance, if you are creating a Client Summary report the selection checkboxes will only appear for client-level nodes. If you are creating a Terminal Group summary report the selection checkboxes will only appear for Client and Terminal Group level nodes. This is intended to prevent selection of incompatible search criteria.

Searching for clients, groups and terminals by name

If you know part or all of he name of the client, terminal group or terminal which you want to select, you can enter this value into the **Search** field in the bottom left-hand corner of the scope dialog and click on either the Find Previous ⬆ or Find Next ⬇ buttons. The application will then search the expanded content for any entry which matches or which contains the pattern which you have entered. The scope dialog will scroll to the first matching row and the row will be highlighted.
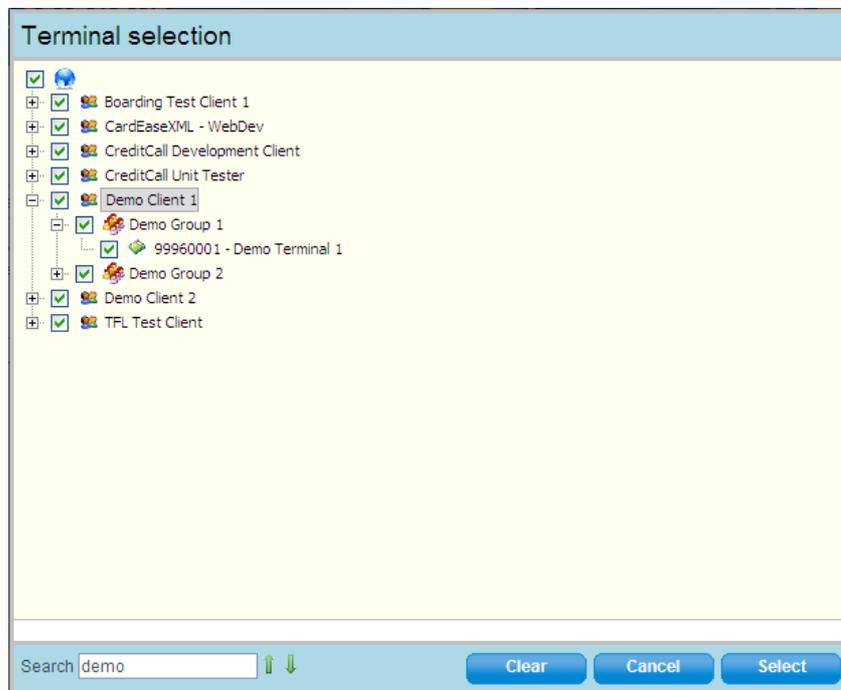
Clicking on the Find Next ⬇ button will then highlight the next matching item in the

tree. Alternatively, clicking Find Previous ⬆ will highlight the previous matching item.

Note; the search option will only work within expanded nodes. You must expand the appropriate nodes before searching.

Selecting a terminal for authorisation using scope

In addition to its use by the reports, the scope dialog is also used by the virtual terminal function to select a terminal for an authorisation. The use of the scope dialog in this context is almost identical to how it is used in report selection, but you should note the following differences;

- the include/exclude checkbox is only present at the Terminal level. It is not possible to include or exclude at the Client or Terminal Group level

you can only select one terminal simultaneously. If you click a terminal checkbox while another terminal is already selected, the original terminal will be automatically unselected.

Offline reports

Reports may be run in either **online** or **offline** mode. An online report is one which is generated on-demand and where the results may be viewed immediately within the browser. Typically an online query is generated either by selecting one of the pre-defined options from the reporting menu or by selecting the **Manual Query** option, entering some search criteria and clicking the **Search** button.

The principal restriction of online queries is that the number of rows in the output is limited to 100 for reasons of performance. If your query contains more than 100 rows the online report will be truncated. To view the truncated rows you will need to submit the report as an offline query. You can do this by clicking the **Generate Report** button which is displayed both at the top-right corner of the results and also within the **Advanced** tab of the search criteria.

When you click the Generate Report button the currently defined report will be added to a queue and you will be free to continue using the application for other tasks. The application constantly monitors the queue and executes reports whenever system resource is available. Once your report has been generated you will receive an email notifying you and you can then collect the results.

The offline report queue is managed to guarantee best performance for all users. This may mean that there will be a delay before your report is available, particularly where your report contains many rows or complex search criteria.

The application will not allow you to submit a report if you already have a report with the same selection criteria pending in the queue.

Once your report has been generated there are two ways to retrieve the results; via the Manage Reports function or via email.

Manage Reports

The Manage reports page allows access to all offline reports as a paged list. You can access from the Manage Reports sub-option within the Reporting menu option or by clicking on the Prepared Offline Reports link at the foot of the reporting menu page. In addition to retrieving completed offline reports you can also use this page to check on the status of your offline reports before they have been completed.

Report Type	Status	Name	Submitted/ Next Due	Completed	Download	
All	All					
Transaction	Pending	AllTransactionsJun24	06/24/08 15:22:00			
Transaction	Completed	AllTransactionsJun14toJun20	06/20/08 09:01:00	06/20/08 09:14:00	Excel Format (1,014.00KB)	Zip Format (260.98KB)
Transaction	Completed	AllTransactionsJun14toJun20	06/20/08 09:01:00	06/20/08 09:14:00	Excel Format (1,014.00KB)	Zip Format (260.98KB)
Transaction	Completed	AllTransactionsJun16	06/16/08 10:38:00	06/18/08 11:35:00	Excel Format (160.50KB)	Zip Format (42.65KB)
TerminalSummary	Completed	TerminalSummaryJun13	06/13/08 15:00:00	06/13/08 15:00:00	Excel Format (91.50KB)	Zip Format (19.17KB)

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Each offline report is displayed in the list with its associated status; **Pending**, **Completed**, **In Progress** or **Error**. Once a report has been generated it is set to a status of **Completed** and the download columns are populated with links which allow you to access the results as an excel spreadsheet in either zipped or unzipped formats. To access the results click on the required link and download the results to your computer.

For the **Report Type** and **Status columns** there are drop-down selectors which let you filter the content of the list to a specific report or status.

Once you have downloaded the results you can delete the report by clicking on the delete icon in the leftmost column. Note that you cannot delete a report with a status of **In Progress**. You are limited to a maximum of 50 offline reports. Once you exceed this total the oldest report in the list will automatically be removed.

Obtaining results by email

You may also choose to have the report results set to you via email. To enable this you must set the **Attach reports to notification email** option in [Account Preferences](#). Whenever a report is completed it will be attached as a zip archive to the notification email. You may optionally set a password which will be used to encrypt the zip archive.

If your report exceeds a certain size it will not be attached to the notification email, even if you have set the **Attach reports to notification email** option.

Customising the columns in the results

By default the application will display a standard set of columns in all the reports. In most circumstances this will be sufficient. However, in the case of the Transaction and Pending Transaction reports it is possible to change the columns which are displayed.

This option is only available to users who have set the user interface preference to Advanced. For information on how to set user preferences, refer to [Setting Account Preferences](#)*.*

Once the advanced user interface has been enabled the user will see an additional tab titled Columns in the Transaction and Pending Transaction reports. By clicking on this tab the user will see lists of all the columns available for inclusion in the report as well as a list of the columns currently included. (The image below shows the column selection dialog for the Transaction report. The list of available for the Pending Transaction report differs slightly but the process is identical).
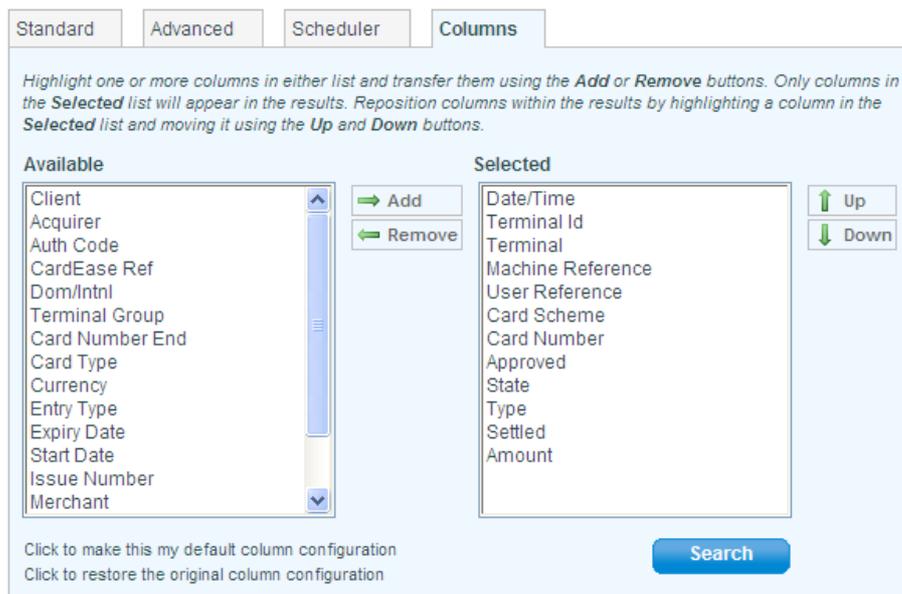
To add one or more additional columns to the results select the appropriate columns in the left hand list and click the **Add** button. (You can select more than column in the list simultaneously by holding down the Ctrl key while you click the items). Similarly, you can remove columns from the results by selecting the appropriate columns in the right hand list and clicking the **Remove** button.

You can also change the position of columns in the results by selecting one or more columns in the right hand list and then clicking either **Up** or **Down** to move them.

Once you are satisfied with the customised column selection you can re-run the current query by clicking the **Search** button. The same set of transactions will be redisplayed with the new column configuration.

If you want the customised set of columns to be used by default for all your reports you can click on the link *Click to make this my default column configuration*. You can restore the original configuration by clicking on the link *Click to restore the original column configuration*.

Scheduling reports

If you need the same report on a regular basis (for example as part of a month-end process) you can define the report once and then request that it be run at a defined interval.

This option is only available to users who have set the user interface preference to Advanced. For information on how to set user preferences, refer to [Setting Account Preferences](#).

Once the advanced user interface has been enabled the user will see an additional tab titled **Scheduler** in all reports.
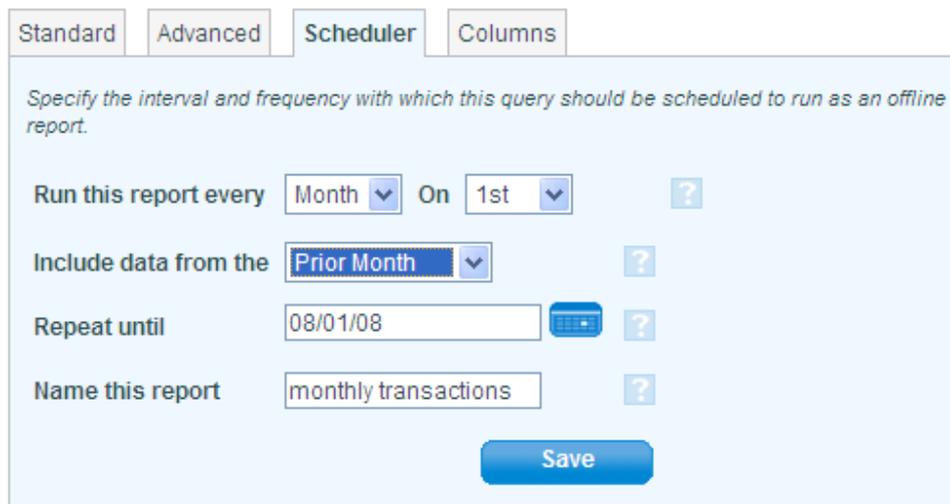
Run this report every...On...
Reports may be scheduled to run daily, weekly or monthly. If you select the weekly or Monthly options you will also be required to supply the weekday or date on which you want the report to be run.

Include data from the...
You must also define the period which will be included in the report. This may be **Prior Day**, **Prior Week**, **Prior Month** or **Month To Date**. Each of these periods is relative to the date on which the report is scheduled to be run. Care must be taken to ensure that

Repeat until
You must also specify a date on which the scheduled report will stop being generated. The application will continue to reschedule the report until the next scheduled date exceeds the date specified in this field. If you leave this field empty, the report will

continue to be rescheduled indefinitely.

Name this report

Use this field to associate a name with the report. This name will be displayed in the notification emails which are sent when each generation of the report is complete and will also be displayed in the Report Management page

Once all the fields have completed as required click the **Save** button to finalise the new scheduled report.

Examples

1. Schedule a report to be run on Monday of each week using data from the previous week. Repeat the report indefinitely.

2. Schedule a report to be run on the first of each month using data from the previous month. Repeat until the end of the year.

3. Schedule a report to be run on the 15th of each month using data from the 1st to the 14th (inclusive).Repeat indefinitely.

Retrieving the output of scheduled reports

When each generation of a scheduled report is completed a notification email will be sent to the email address associated with your account. You can then log in and access the output using the Manage Reports function.

Alternatively, if you set the account preference for Attach reports to notification email, the output will be attached to the notification email as a zip archive thereby removing the need to log in to retrieve the output. for instruction on how to to set this preference, please refer to Setting Account Preferences.

Modifying & deleting scheduled reports

It is not possible to change the details of a saved schedule. You must use the Manage Reports function to delete the version of the report which is currently pending and then re-enter the scheduled report.

Additional options for settlement reports

If you have selected the Bank Submissions report the scheduler tab will contain an additional option, **Report Style**. This defines whether the scheduled report will be in the format of a Settlement Summary or Settlement Detail report. You should select the appropriate value for this field before clicking **Save**.

Performing authorisations

You can use this page as a virtual terminal to perform authorisations for MOTO (Mail Order/Telephone Order) transactions.

The virtual terminal presents a tabbed interface. You can switch between tabs by clicking the tab name. The principal fields are all grouped on the **Standard** tab.

- *Terminal*
  You cannot type directly into this field. To select a terminal, click on the Scope button and follow the instructions for [Selecting a terminal using the Scope button](#). If your account is only configured with a single terminal it should be automatically pre-selected.
- *Amount*
  Enter the transaction amount to be authorised. This should be a decimal money value without a currency symbol (eg, 10, 11.20 etc)
- *Card Number*

enter the full card number for the transaction without any spaces

- *Expiry Date*
  select the month and year of the card expiry date
- *Start date*
  Where appropriate (eg for SOLO and Swift cards), select the month and year for the card start date
- *Issue Number*
  Where appropriate (eg, SOLO and Swift cards) enter the card issue number
- *User Reference*
  enter an optional ad-hoc descriptive string which will be recorded against the transaction

The **Address Verification Details** tab contains a series of fields in which you can enter the cardholder address. If any of the values within this tab are supplied Address verification checks will also be applied to the transaction. If you do not want to perform address verification checking you can omit all values on this tab.

Once you are satisfied that you have entered the transaction values correctly, click on

the Submit button to send the authorisation request. You will be asked to provide confirmation that you want to proceed with the authorisation. If you confirm the request it will be submitted for authorisation and – after a few seconds – the response will be displayed.

Authorisation Approved

The authorisation request has been approved.
Click *Continue* to return to the authorisation page.

Transaction Reference	ce33c602-db99-dd11-aad6-000f1f660b7c
Terminal Date/Time	14/10/08 11:29:51 (GMT/BST)
Card Number	401200 - 0026
Expiry Date	12/20
Card Scheme	VISA
Amount	£0.51
Auth Code	2FA3BF
User Reference	test

Receipt   Receipt (PDF)   Continue

Specifying the card using the card reference & card hash key.

If you have already authorised a transaction for a card and have stored the unique reference and hash key combination which uniquely identify the card, you may perform a new authorisation without knowing the card number. To select the card using the reference/hash combination click on the **use card reference** prompt to the right of the **Card number** field title. The standard card identification fields (card number, expiry date, issue number and start date) will all be hidden and replaced with input fields for the card reference and hash.

Note that you can return to the standard card details input by clicking on the use card number link. Note also that you will still be required to enter the card security code for an authorisation using the card reference/hash key combination.

Printing a receipt

The **authorisation approved** page contains two buttons to print a receipt for the transaction. If you click the **Receipt** button the standard windows printer selection dialog will be displayed and the receipt will be printed directly to the printer which you have selected. If you click the **Receipt(PDF)** button the receipt will be generated in PDF format and will be displayed within the browser. You will then be able to print the receipt or save the file for later use or electronic transmission.

Note that the PDF receipt option will only be available if your browser is configured with a suitable PDF reader (such as Adobe Acrobat).

An example of the receipt output is shown below.

```
SALE
Card scheme          VISA
Card no.             401200 - 0026
Expires              12/20
Amount               GBP0.51
Auth code            2FA3BF
Terminal             99970392
14/10/08 11:29:51
PLEASE RETAIN FOR YOUR RECORDS
```

Refunding a transaction

To refund a transaction you must first select the transaction to be refunded using the [transaction report](#). Once you have found the transaction, click on the card icon 🃏 in the leftmost column to display the [transaction information](#). If the transaction is refundable, the **Actions** box at the top of the detail information will display a **Refund** button and the total amount refundable.
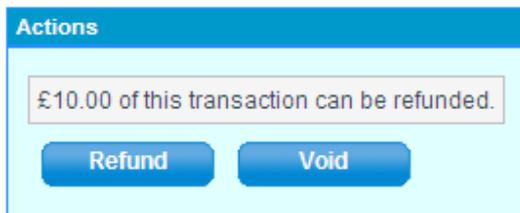
If you select the **Refund** button the *Refund Entry* page will be displayed where you will be required the amount of the refund (which must be greater than zero but not more than the amount of the transaction). You may optionally enter a *User Reference* which will be recorded against the transaction.

When you are satisfied that the refund details have been entered correctly, hit the **Submit** button. A *Refund Confirmation* page will be displayed containing the details of the proposed refund for your review.

Transaction Reference	67156b51-a149-dd11-a1bb-000f1f660b7c
Terminal Date/Time	07/04/08 08:15:10 (GMT/BST)
Card Number	401200 - 0026
Expiry Date	12/2020
Card Scheme	Visa
Amount	£10.00
User Reference	Refunded by A.B.

To finalise the transaction click the **Confirm** button. The refund will be recorded and - after a short delay - a confirmation message will be displayed.

Refund Approved

The refund request has been approved.
Click *Continue* to return to the reporting menu page.

Transaction Reference	ce33c602-db99-dd11-aad6-000f1f660b7c
Terminal Date/Time	14/10/08 11:45:19 (GMT/BST)
Card Number	401200 - 0026
Expiry Date	12/20
Card Scheme	Visa
Amount	£0.51
User Reference	fc

Printing a Receipt

The **refund approved** page contains two buttons to print a receipt for the refund transaction. If you click the **Receipt** button the standard windows printer selection dialog will be displayed and the receipt will be printed directly to the printer which you have selected. If you click the **Receipt(PDF)** button the receipt will be generated in PDF format

and will be displayed within the browser. You will then be able to print the receipt or save the file for later use or electronic transmission.

Note that the PDF receipt option will only be available if your browser is configured with a suitable PDF reader (such as Adobe Acrobat).

An example of the refund receipt output is shown below.

```
REFUND

Original transaction      ce33c602-db99-dd11-aad6-000f1f660b7c

Card scheme               Visa

Card no.                  401200 - 0026

Expires                   12/20

Amount                    GBP0.51

14/10/08 11:45:19

PLEASE RETAIN FOR YOUR RECORDS
```
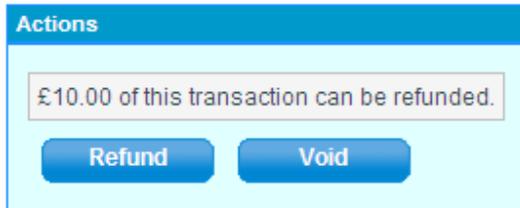
Voiding a transaction

To void a transaction you must first select the transaction to be voided using the transaction report. Once you have found the transaction, click on the card icon in the leftmost column to display the transaction information. If the transaction may be voided the **Actions** box at the top of the detail information will display a **Void** button.

If you select the **Void** button a confirmation page will be displayed which contains the details of the proposed void for your review. If you are satisfied that the details are correct click the **Confirm** button to finalise the void.

When the transaction has been voided a *Void Approved* page will be displayed.

Administering your account

The application includes extensive account management functions. These will allow you to change and retrieve your password, to monitor the ways in which your account is being used and to alter the default behavior and appearance of the application to suit your own requirements.

Changing the account password

To change the password associated with your account select the **Change Password** option within the **Account** menu option.

Enter your existing password and the new password into the appropriate input fields. Note that for security reasons the actual characters will not be visible. You will be required to enter the new password value twice to ensure accuracy. When you are satisfied that you have entered these values accurately, hit the **Submit** button to finalize the request.

You should refer to the Account Policy page to view any restrictions which apply to your choice of password. These will typically include controls on the length and content of the password.

To use this function you must know your existing password. if you have forgotten your password you should follow the Forgotten Password link from the login page.

In the interests of security the platform will require you to change your password every 90 days. If you believe that the privacy of your password has been compromised at any time, you should change your password at the earliest opportunity.

Viewing account usage history

To view an audit trail of all activities associated with your account select the **Usage History** option within the **Account** menu option.
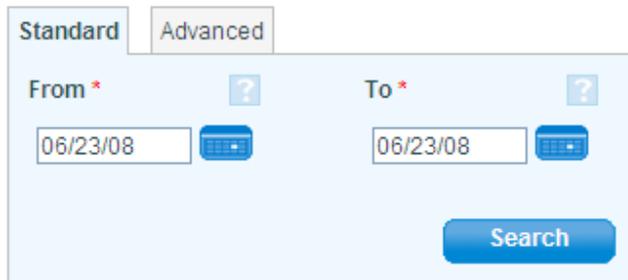
You must define the date range for the usage report by supplying **From** and **To** dates. When you are satisfied that you have entered the dates correctly, click the **Search** button to generate the report.

Show search criteria ▼

First 100 results found

Date/Time (Local) ▼	IP Address	Message	Info
06/23/08 15:50:20	127.0.0.1	Retrieve Transactions	End
06/23/08 15:50:16	127.0.0.1	Retrieve Transactions	End
06/23/08 15:50:13	127.0.0.1	Retrieve Transactions	End
06/23/08 15:43:57	127.0.0.1	Retrieve Node Summary	End
06/23/08 15:43:51	127.0.0.1	Retrieve Transactions	End
06/23/08 15:43:34	127.0.0.1	Retrieve Transactions	End
06/23/08 15:25:18	127.0.0.1	Log On	End
06/20/08 16:04:26	127.0.0.1	Log On	End
06/20/08 15:24:38	127.0.0.1	Log Off	End
06/20/08 15:20:34	127.0.0.1	Log On	End

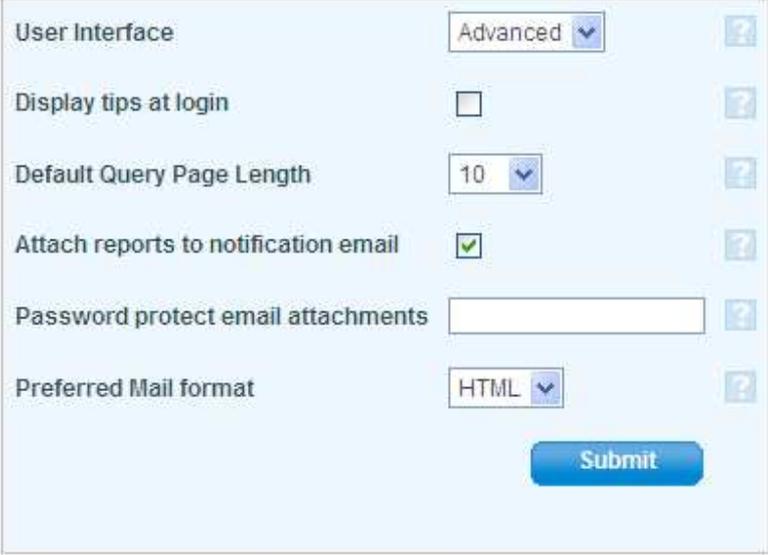Pages | Previous **1** 2 3 4 5 6 7 8 9 10 Next

The results will be presented as paged set of account audit records. Each row in the results represents an individual action recorded against your account and includes the date & time of the audit action, the IP address of the client machine from which the action was initiated and a description of action. By default the results will be ordered by date & time with the most recent record at the top but you may reorder the results by

clicking any of the grey cells immediately beneath the column headings.

Setting account preferences

Account Preferences are a set of configurable values which may be set by the user and which will control certain aspects of the way in which the account behaves or information is displayed.

To set your account preferences, select the **Preferences** option within the **Account** menu option.

To change one or more of your preferences enter (or select) a new value for each input field and click the Submit button to commit the changes.

The preference options are;

- *User Interface*
  You may select either a Simple or an Advanced user interface. By default the value for this preference is Simple but if you change it to Advanced your user interface will include certain advanced options not normally available. These include access to the Offline Report Scheduler and the Query Column selection option.
- *Display Tips at Login*
  Whenever you login, the platform will display a helpful tip. This is designed to assist you to become aware of the platform's features. You may turn this feature off by un-checking this preference.
- *Default Query Page Length*
  By default the online reports will only display 10 records on each page of output. You can use this preference to increase the number of records per page of output.

This will typically only be suitable for those users who are operating the platform with a high screen resolution.

- *Attach reports to notification email*
  Check this preference if you want the platform to attach the results of any completed query to the email which is sent to notify you that the query has been completed. If left unchecked (which is the default) you will need to login to the platform to access the completed query results.
- *Password protect email attachments*
  This preference defines a password which will be used to protect the zip archives which are optionally attached to the emails sent by the platform to notify you of the completion of a query. This preference only applies if the Attach reports to notification email preference has also been selected.
- *Preferred Mail format*
  Select either HTML or Text to define the format which will be used for any email messages sent by the platform. In general, HTML will provide a more attractive and clear format.

Certain changes to the Preferences may require you to log out/log in before they become active.

Account policies

This page displays the policies which apply to your account. These include;

- the amount of time a session may be inactive before it is logged out automatically
- how the application handles multiple unsuccessful logins and inactive accounts

the rules which the application uses to assess the adequacy of a password.

Forgotten password

If you have forgotten your password you should click on the **Forgotten your password?** link on the login page.

You will be prompted to enter the email address associated with the account and click the **Send Email** button.
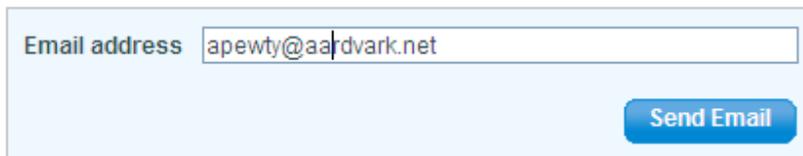
After a short delay, check your email account in-box and you should find an email containing a link which will allow you to set a new value for your password.

It is not possible for you to retrieve a forgotten password. You can only set a new password.

You should not use this function if you know your existing password and want to change it. You should then use the Change Password function.