



## **Discovery Migration Guide**

**For Discovery Web users migrating  
login credentials to FIS eAccess**



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## Migration Steps

### Migration Wizard for Discovery Users Without FIS eAccess Credentials

If you are a customer with Discovery credentials who does NOT have FIS eAccess credentials, when you log into Discovery using your Discovery credentials, you will be prompted with the following screen.

**Logout**

**Select Create new FIS eAccess User ID**

Fill out the following information to create FIS eAccess credentials. The **Type of User** should say **Customer**. For the New User ID, use your corporate email address. Then click **Submit**.

**User Details**

In an effort to improve the Discovery (aka Penley) User Authentication, FIS is migrating the User Authentication functionality to SiteMinder. As such, Discovery Users will begin accessing the Discovery environment through the FIS eAccess portal [www.fisglobal.com](http://www.fisglobal.com).

- If you already access the eAccess portal, please select the 'Use existing FIS eAccess User ID' option below, and provide the requested information.
- If you do not already access the eAccess portal, please select the 'Create new FIS eAccess User ID' option below and provide the requested information.

Create new FIS eAccess User ID  
 Use existing FIS eAccess User ID

\* **Type of User**

\* **New User ID**

User ID must be a corporate email address

\* **New Password**

\* **Re-Confirm Password**

Password must follow these rules:

- Have a minimum length of eight characters.
- Contain characters from each of the three following categories:
  - (A-Z)
  - (a-z)
  - (0-9)
- Not be the same as your User ID either forward or in reverse (abcd or dcba)

Note: Password Expires after 45 days



After successfully creating new FIS eAccess credentials, the following screen will appear.



Congratulations! You have been successfully migrated to the new SiteMinder User Authentication. This page will soon be redirected to the eAccess login page where you will be prompted to provide your eAccess User ID and Password. Remember - in the future when you want to access the Discovery environment, you must login via the FIS eAccess portal ([www.fisglobal.com](http://www.fisglobal.com)). If this page is not redirected to the eAccess login page in 5 seconds, please [click](#) here.

You will be redirected to FIS eAccess where you will login. From there you will be able to access your Discovery Web products and services.

**NOTES:** Once you have created eAccess credentials, you will always need to log into FIS eAccess to access your Discovery Web products and services. Please save the login URL to your favorites.

If you already have FIS eAccess credentials and did not remember you had them, when attempting to create new FIS eAccess credentials, you will receive an error message indicating the User ID already exists.



**User Details**

**Validation Error**

You must correct the following error(s) before proceeding:

- The User ID you chose already exists. Please choose a different User ID or select 'Use existing FIS eAccess User ID'.

Contact Member Solutions at 800.207.2742 or [MSOL@fisglobal.com](mailto:MSOL@fisglobal.com) to find out what your credentials are or to have your password reset.

From the successful migration page, you will be redirected to the FIS eAccess login screen. Continue to the [Logging Into FIS eAccess for the First Time After Migration for New Users](#) section on page 6.



## Migration Wizard for Discovery Users With FIS eAccess Credentials

If you are a customer with Discovery credentials that HAS FIS eAccess credentials, click the **Use existing FIS eAccess User ID** radio button and the following screen will appear.

**Select Use existing FIS eAccess User ID**

Enter your FIS eAccess credentials and click **Submit**.

**User Details**

In an effort to improve the Discovery (aka Penley) User Authentication, FIS is migrating the User Authentication functionality to SiteMinder. As such, Discovery Users will begin accessing the Discovery environment through the FIS eAccess portal, [www.fisglobal.com](http://www.fisglobal.com).

- If you already access the eAccess portal, please select the 'Use existing FIS eAccess User ID' option below, and provide the requested information.
- If you do not already access the eAccess portal, please select the 'Create new FIS eAccess User ID' option below and provide the requested information.

Create new FIS eAccess User ID

Use existing FIS eAccess User ID

\* eAccess User ID

\* Password

Once you have entered your eAccess credentials here, you will receive a message indicating you have migrated your credentials successfully.

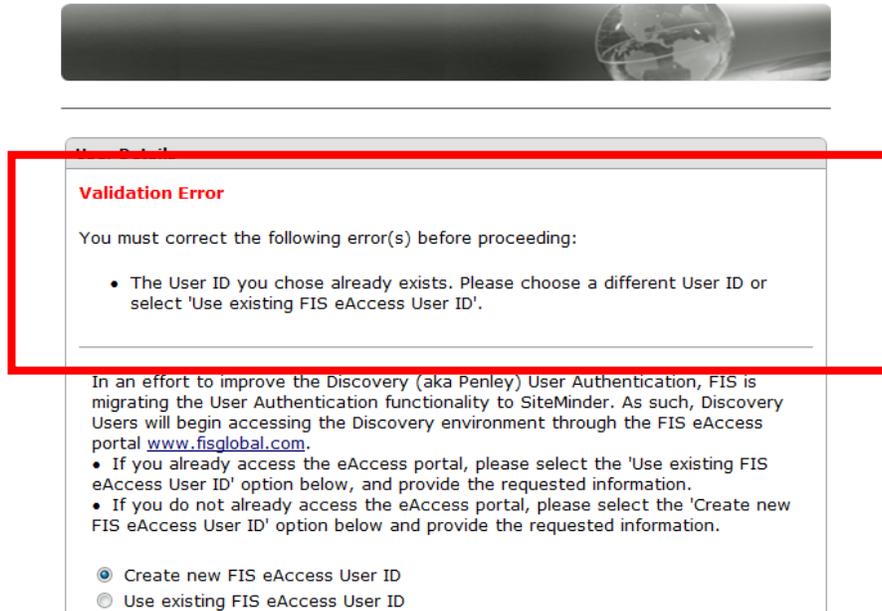
**FIS**

Congratulations! You have been successfully migrated to the new SiteMinder User Authentication. This page will soon be redirected to the eAccess login page where you will be prompted to provide your eAccess User ID and Password. Remember - in the future when you want to access the Discovery environment, you must login via the FIS eAccess portal ([www.fisglobal.com](http://www.fisglobal.com)). If this page is not redirected to the eAccess login page in 5 seconds, please [click](#) here.

You will be redirected to FIS eAccess where you will login. From there you will be able to access your Discovery Web products and services. See the [Login Screen](#) on page 5.

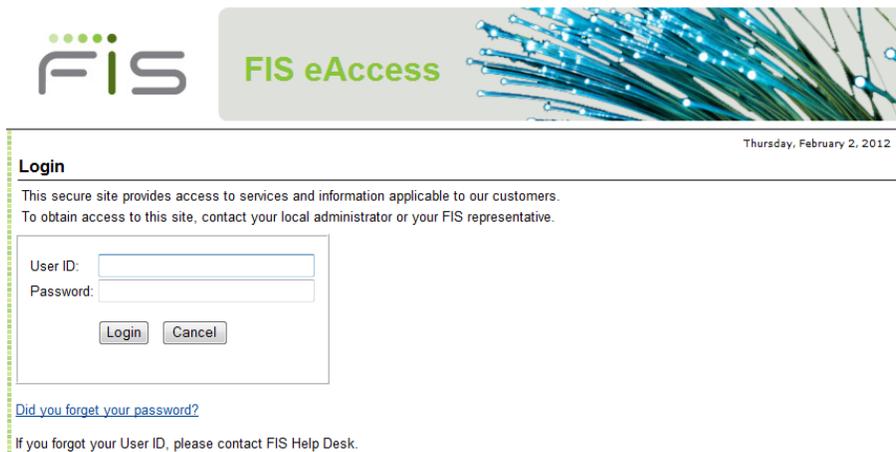


If you already have FIS eAccess credentials and did not remember you had them, when attempting to create new FIS eAccess credentials, you will receive an error message indicating the User ID already exists.



Contact Member Solutions at 800.207.2742 or [MSOL@fisglobal.com](mailto:MSOL@fisglobal.com) to find out what your credentials are or to have your password reset.

You will be redirected to the eAccess login page after successful migration. The login page will appear as it does below.



Once redirected, be sure to save the login page to your favorites.

See the [Accessing Discovery through eAccess](#) section on page 9 for instructions on how to access Discovery through eAccess.



## Logging Into FIS eAccess for the First Time After Migration for New Users

**Login**

This secure site provides access to services and information applicable to our customers.  
To obtain access to this site, contact your local administrator or your FIS representative.

User ID:

Password:

[Did you forget your password?](#)

If you forgot your User ID, please contact FIS Help Desk.

Enter your new eAccess credentials and click **Login**.

For your first login, you will be asked to select security questions that will help you in the event your password is forgotten. You will see the following screen.

**Challenge Question**

Select a challenge question and enter your response to that question. The challenge question and answer are used to verify your identify if you need to reset your password.

Challenge Questions:

Select Challenge Question

Select Challenge Question

Select Challenge Question

Answer:

Select three challenge questions from the drop-down list and fill in the corresponding answers and click the **Continue** button. You will now be able to continue to FIS eAccess.

Once you have successfully changed your security questions, continue with the [Accessing Discovery through eAccess](#) section on page 9.



## Migrating Users that have Multiple Organization IDs

Users that have access to multiple organization IDs will need to migrate each organization ID separately. When migrating your first organization ID, go through the migration steps as instructed in the [Migration Wizard for Discovery Users Without FIS eAccess Credentials](#) section on page 2. Once you have completed the first migration, log into Discovery using your next organization ID.

When prompted with the migration wizard, select **Use existing FIS eAccess User ID** on the first page and then enter your new eAccess credentials.

**User Details**

In an effort to improve the Discovery (aka Penley) User Authentication, FIS is migrating the User Authentication functionality to SiteMinder. As such, Discovery Users will begin accessing the Discovery environment through the FIS eAccess portal, [www.fisglobal.com](http://www.fisglobal.com).

- If you already access the eAccess portal, please select the 'Use existing FIS eAccess User ID' option below, and provide the requested information.
- If you do not already access the eAccess portal, please select the 'Create new FIS eAccess User ID' option below and provide the requested information.

Create new FIS eAccess User ID

Use existing FIS eAccess User ID

\* eAccess User ID

\* Password

Continue with the migration steps and the migration wizard will merge your multiple organization IDs under one User ID.



## Discovery Access After Migration

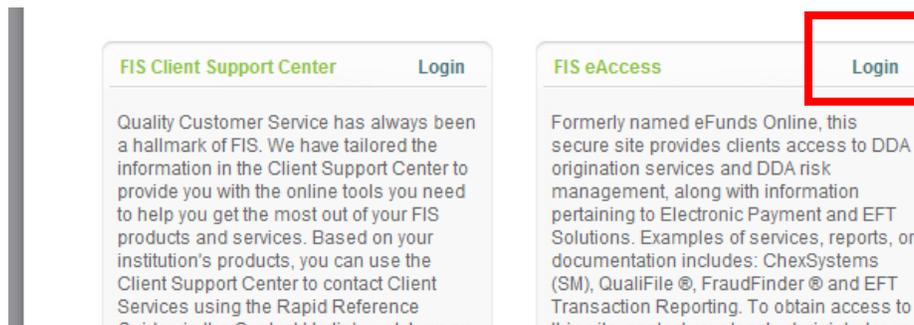
### Accessing the eAccess after Migration

It is strongly recommended that users save the link to the eAccess login page to their favorites list. Follow the steps below for access to the login page.

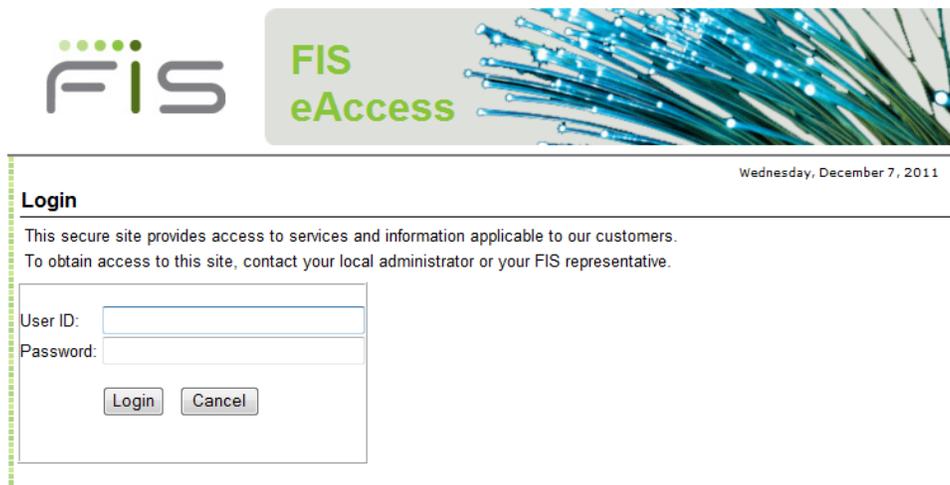
You can access the FIS eAccess login page by going to [www.fisglobal.com](http://www.fisglobal.com), click the login button in the upper right-hand corner.



Click the **Login** link next to the FIS eAccess portal.



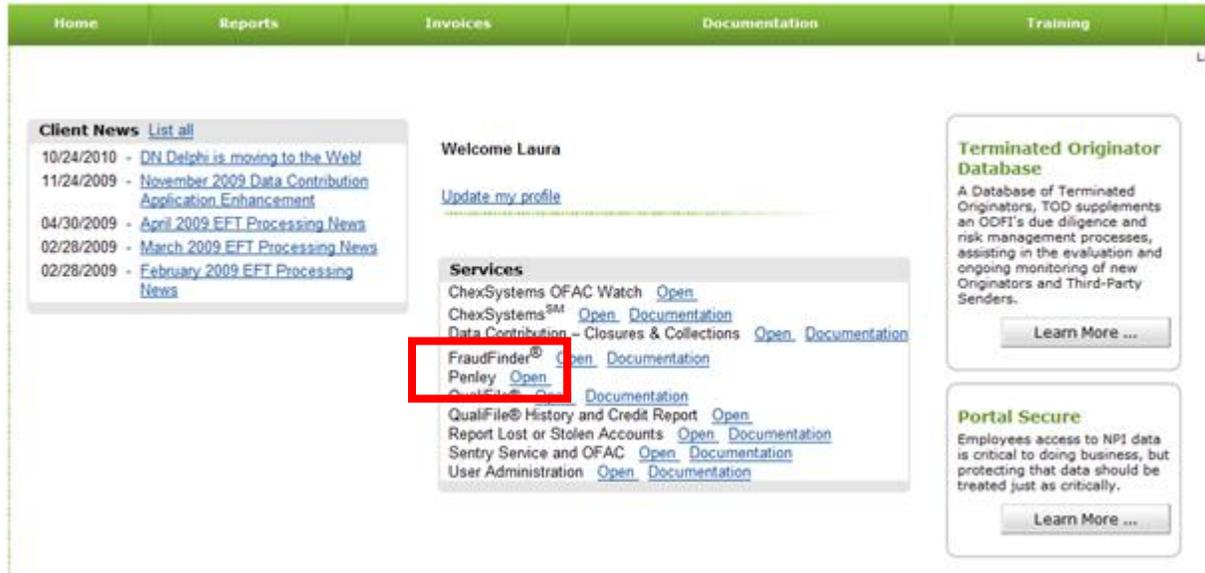
The FIS eAccess login page will appear.





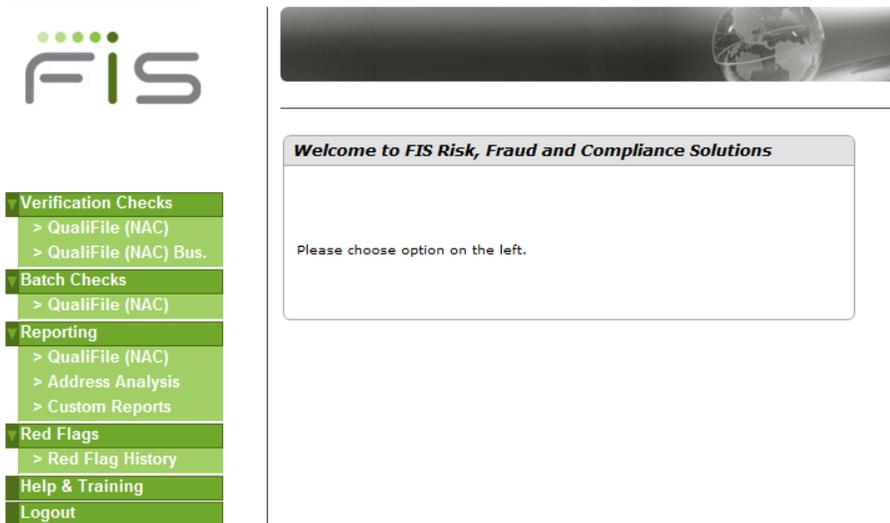
## Accessing Discovery through eAccess

Once you have successfully logged into FIS eAccess, access your Discovery applications by logging into FIS eAccess. The following screen will appear:

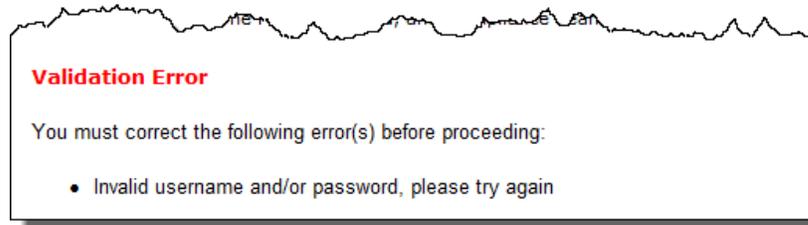


Click the **Open** link next to **Penley** on the Services list.

The Discovery welcome screen will appear as it does today.



**NOTE:** Once you have migrated with your FIS eAccess credentials, if you attempt to access Discovery using the old URL (production.penleyinc.com) with the old credentials, you will receive an error message:



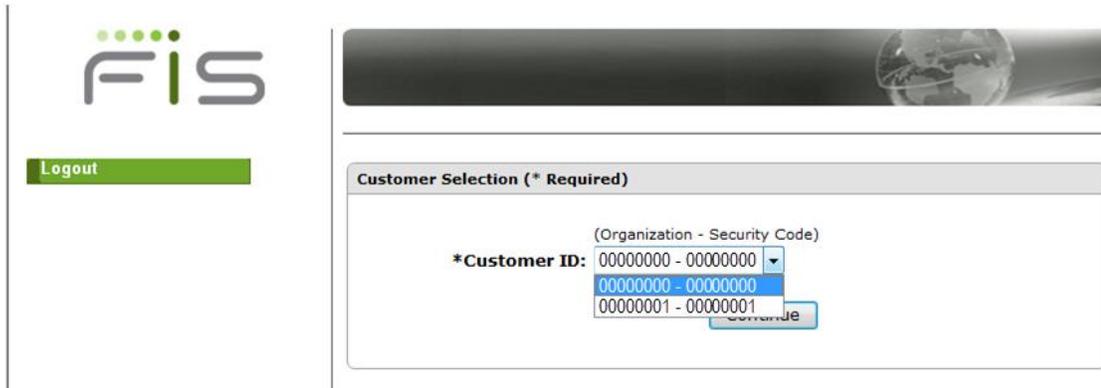
If you go to the old URL and try to use your new credentials, you will be redirected to FIS eAccess. See the screen below.



This page will soon be redirected to the eAccess login page where you will be prompted to provide your eAccess User ID and Password. Remember - in the future when you want to access the Discovery environment, you must login via the FIS eAccess portal ([www.fisglobal.com](http://www.fisglobal.com)). If this page is not redirected to the eAccess login page in 5 seconds, please [click here](#).

### Accessing Discovery with Multiple Organization IDs

Customers that have multiple organization codes will see a selection screen when they click the Penley link on eAccess.



From the drop-down menu, select the Organization ID you would like to login under and click **Continue**.

You will then be able to access your Discovery applications under the correct organization ID.



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