



Discovery and eAccess

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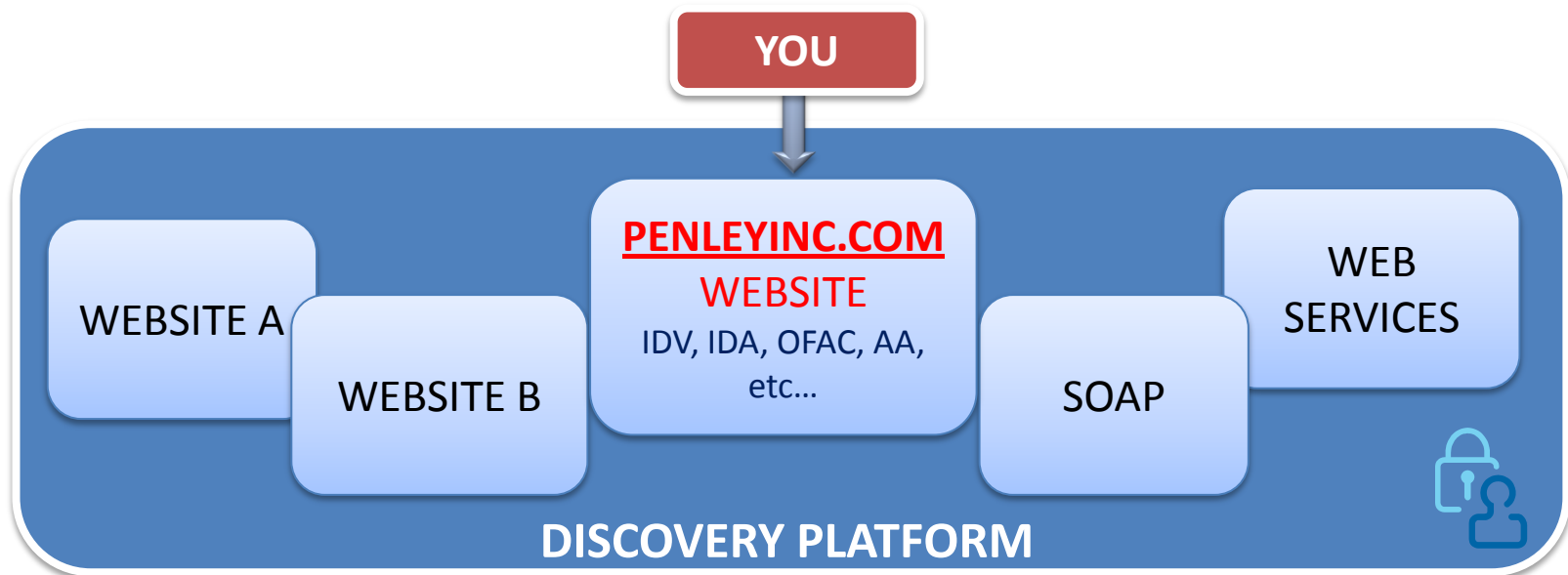
- **Penleyinc.com** and Discovery
- Reasons for change
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- What to expect
- User Administration
- FAQ
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Penleyinc.com and Discovery

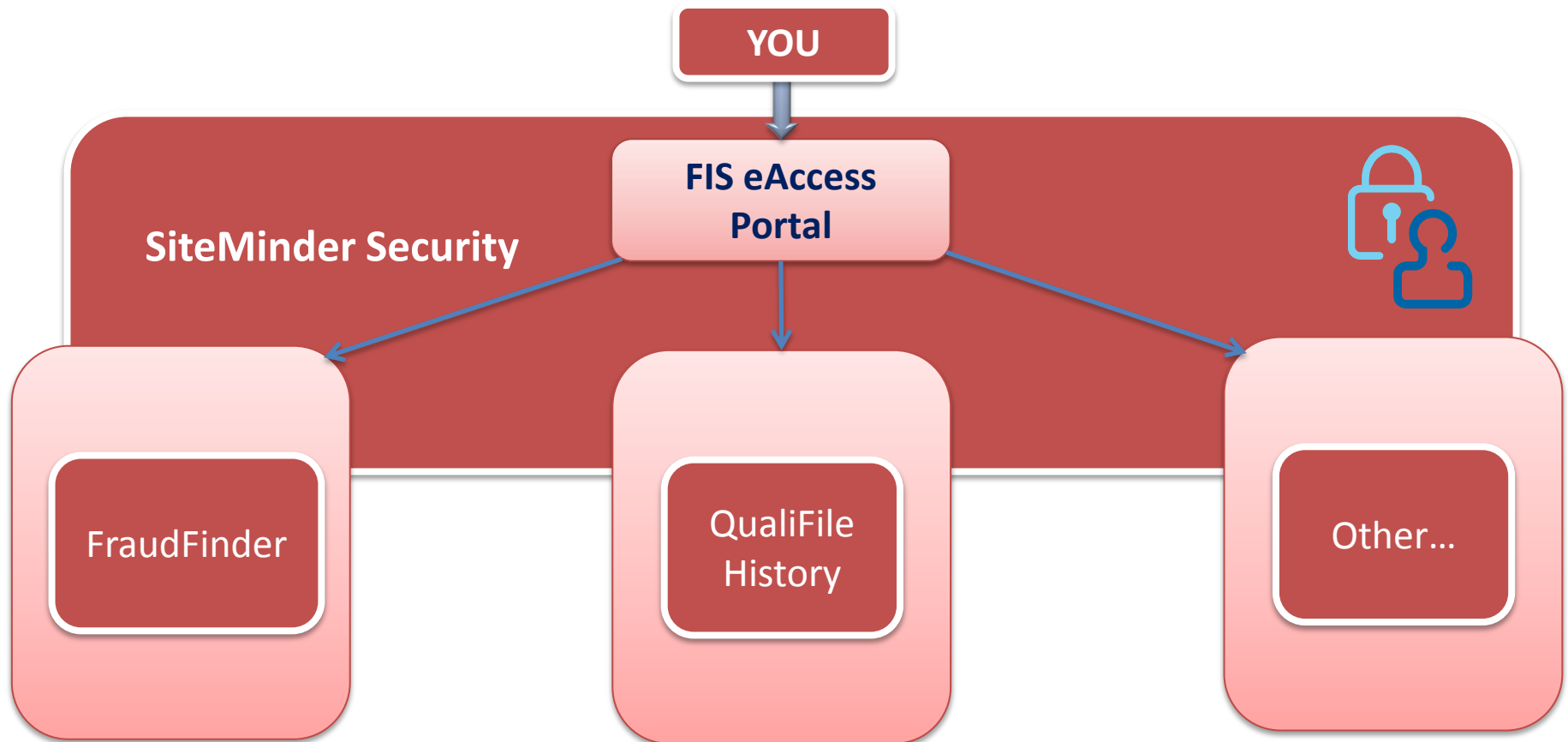


Penleyinc.com is an **FIS website**, hosted on the **FIS Discovery platform**.





Today, many of our **FIS RFC** products are already available through the **FIS eAccess portal**.

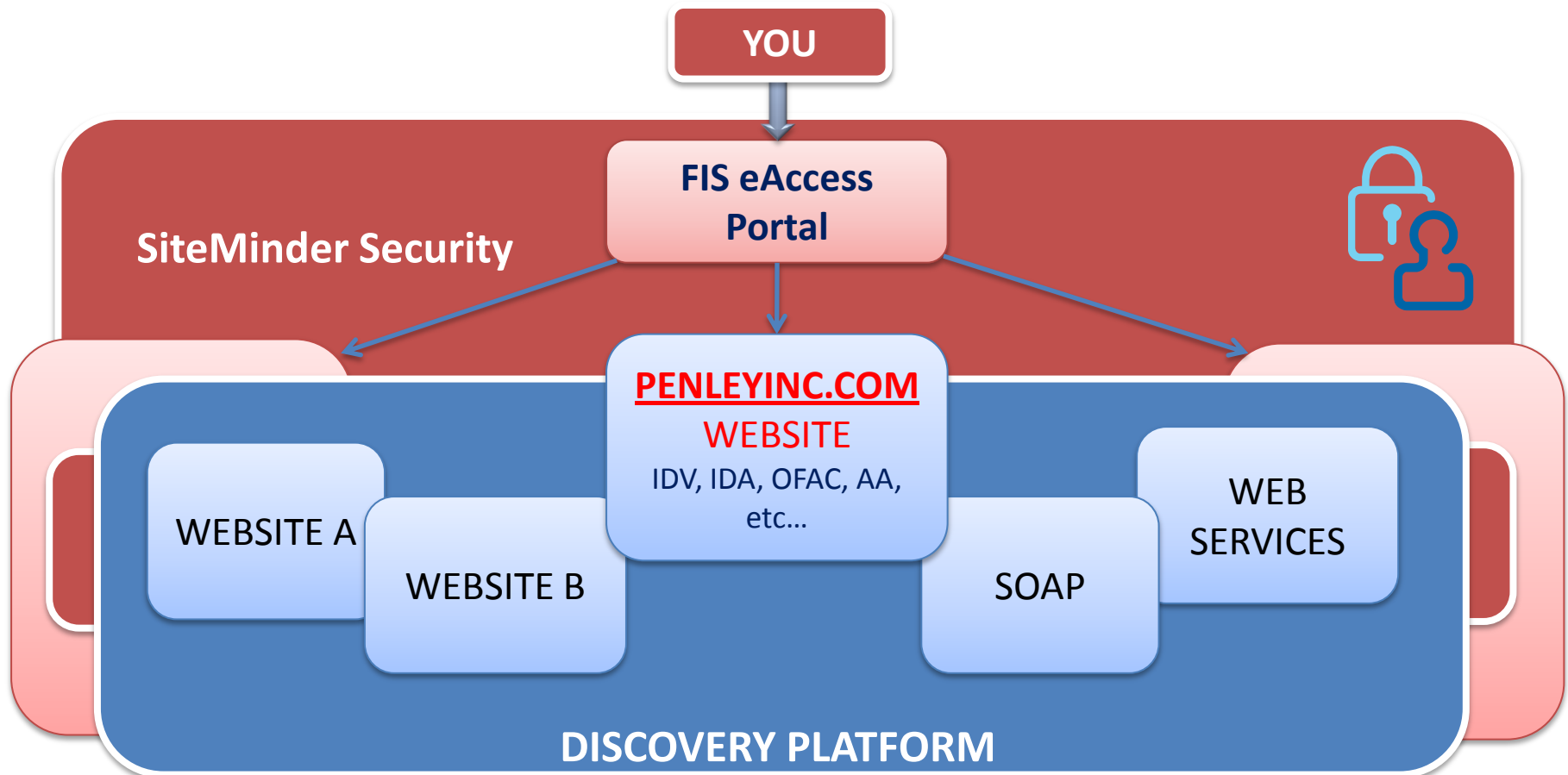


Penleyinc.com

what is changing?



The **PenleyInc.com website** will be secured by SiteMinder security and access will be consolidated into the **FIS eAccess portal**.





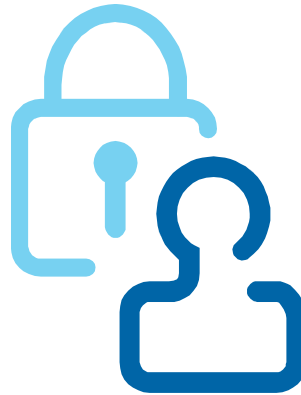
Reasons for change

Reasons for change

Why are we changing the Discovery platform?



In an effort to improve the
Discovery User Authentication and to **gain more consistency cross-channel**,
FIS is migrating the Discovery User Authentication functionality to **SiteMinder**.



****SiteMinder** is a security industry standard and provides proven technologies.*

Reasons for change

When and how?



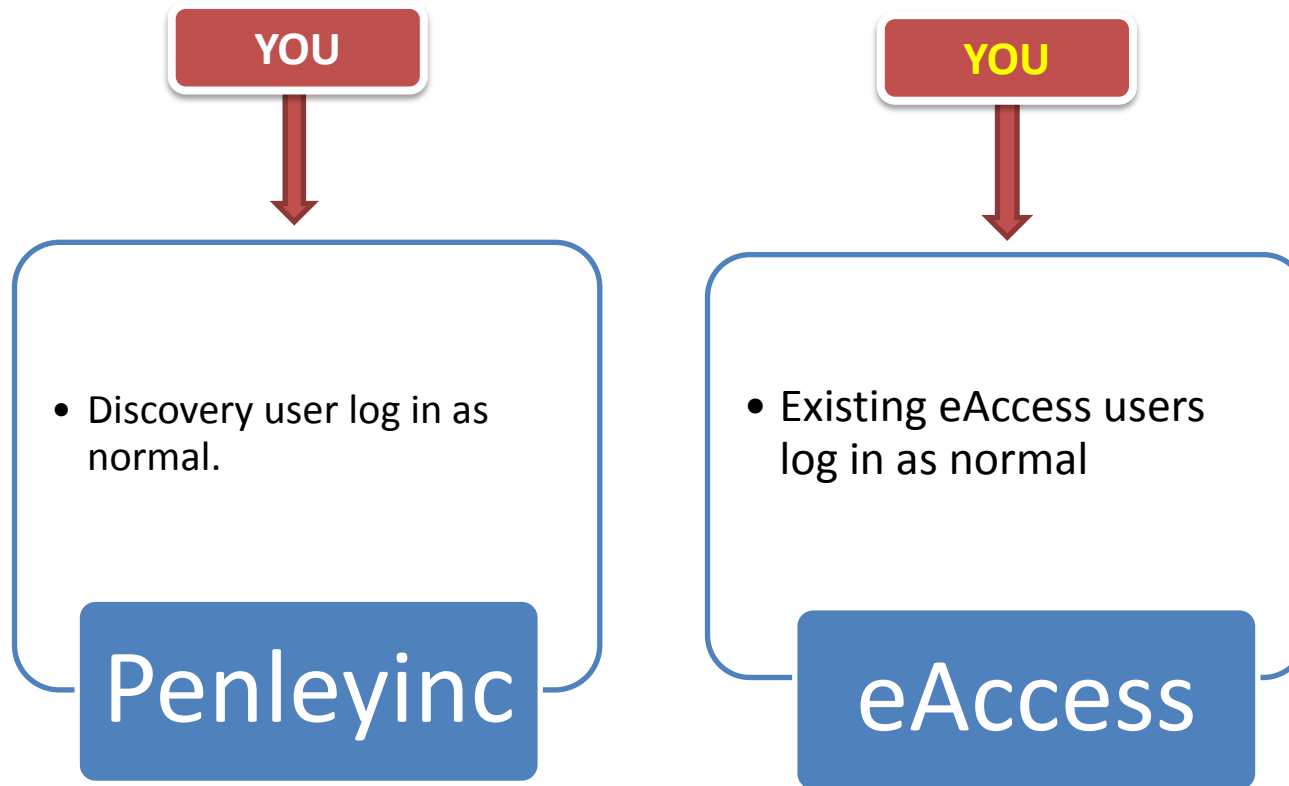
- Discovery Users will begin accessing the Discovery environment through the FIS eAccess portal.
- The migration to SiteMinder will be phased as follows:
 - Penleyinc.com Website – March 2012
 - Other Penley Websites, including those managed by Resellers - **TBD**
 - Discovery WebServices/SOAP Channel – **TBD**
- Once migrated, Users will need **only one set of credentials** (*User ID and Password*) to access both **Penley** and **eAccess** websites. No longer will Users need to remember/manage separate credentials for each environment!



Discovery and eAccess

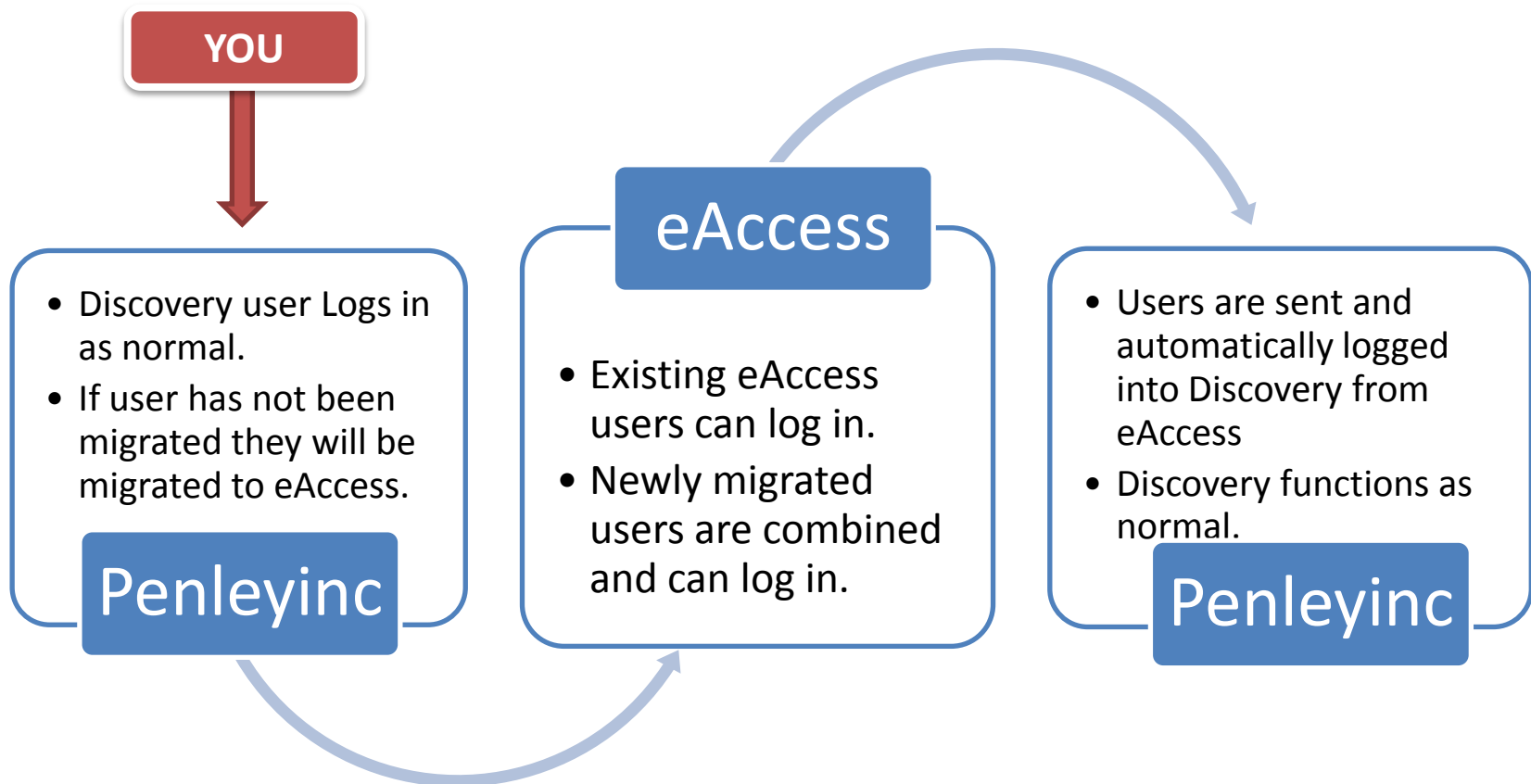
Discovery and eAccess

What happens today



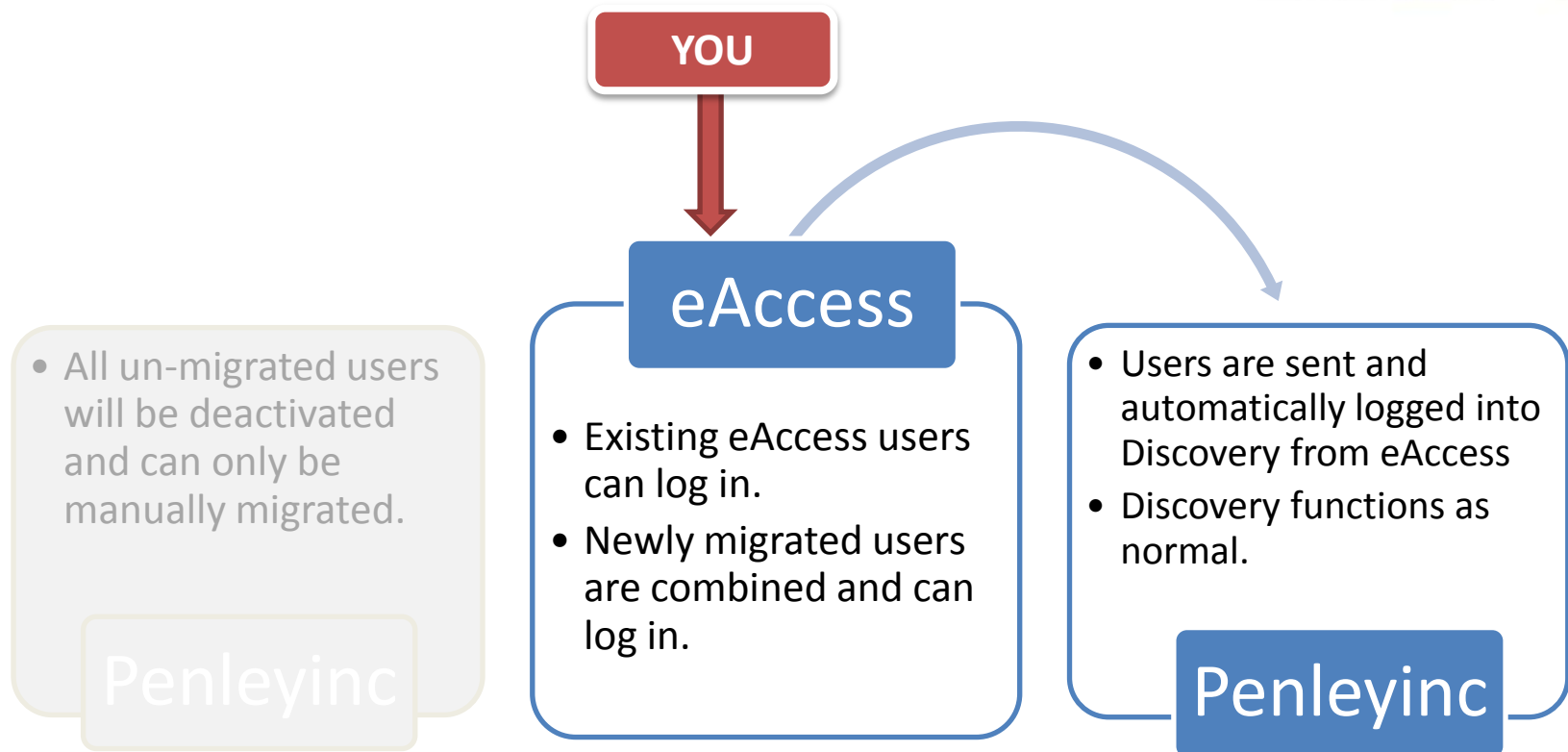
Discovery and eAccess

What is changing?



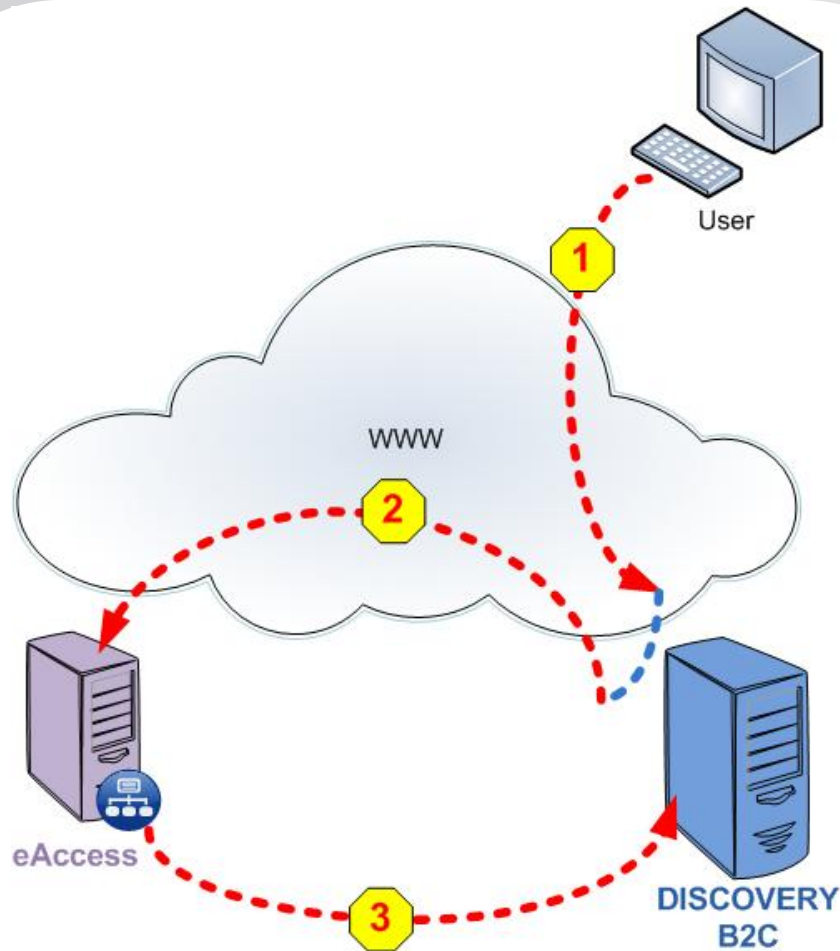
Discovery and eAccess

What is changing?



Discovery and eAccess

in practice...



1. User goes to Penleyinc.com
2. User is migrated and/or redirected to the eAccess portal.
3. After logging in to the eAccess portal the user clicks the “Discovery” link and is sent back to Discovery.



What to expect

What to expect

During the migration.



Log On

LOGIN

Username

Password

Organization

Submit

**production.penleyinc.com or
chexsystems.fnfis.com**

This is what the logon
screen looks like today

What to expect

What changes can we expect and what does it look like?



User Details

In order to make the applications more secure, stringent rules have been introduced for the user id and password. In line with that change, the existing users are being migrated to comply with those rules. After the migration, the users will have to come via www.fisglobal.com to access this application. If you already have access to www.fisglobal.com (eAccess) and would like to use that, please enter that user ID below. Otherwise, please create a new user ID.

☒ 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

- Choose between creating a new eAccess portal User ID or use an existing eAccess portal User ID.
- Internal and customer users are now supported. (Internal users are FIS support and compliance staff)
- Select a new FIS security compliant Password.

What to expect

What changes can we expect and what does it look like?



Logout

User Details

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- ☐ Create new FIS eAccess user id
☒ Use existing FIS eAccess user id

* eAccess User ID

* Password

Submit

Reset

Existing eAccess portal users will be prompted for their current User ID and Password.

**If you don't have your eAccess portal credentials please contact your administrator for assistance.*

What to expect

What changes can we expect and what does it look like?



You have been successfully migrated. You will be shortly redirected to the eAccess login page. If the page is not redirected automatically in 5 seconds, please [click](#) here.

SUCCESSFULLY MIGRATED !

What to expect

What changes can we expect and what does it look like?



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:	<input type="text"/>
Password:	<input type="password"/>
	<input type="button" value="Login"/> <input type="button" value="Cancel"/>

[Did you forget your password?](#)

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

The eAccess portal logon screen.

What to expect

What changes can we expect and what does it look like?



The screenshot shows the FIS eAccess portal. At the top, there's a header with the FIS logo, the text 'FIS eAccess', and navigation links: FIS | CONTACT US | SITE MAP | LOGOUT. Below this is a search bar. A green navigation bar contains links: Home, Reports, Invoices, Documentation, Training, News, and User Admin. On the right side of the page, login information is displayed: Last Password Change: Thursday, June 02, 2011 2:41:06 PM; Previous Login: Monday, July 18, 2011 10:33:59 AM; Current Login: Monday, July 18, 2011 11:44:32 AM. The main content area is divided into sections. The 'Invoices' section has a link 'Access Invoice'. The 'Client News' section has a 'List all' link and a list of news items with dates and titles. The 'Services' section has a link 'Open' next to 'Penley'. A 'Welcome superAdmin' message is also present. A 'NEWS' box contains a message about Adobe Acrobat Reader updates. A blue arrow points from the 'Open' link in the Services section to a blue callout box.

FIS

FIS eAccess

FIS | CONTACT US | SITE MAP | LOGOUT

SEARCH

Home Reports Invoices Documentation Training News User Admin

Last Password Change : Thursday, June 02, 2011 2:41:06 PM
Previous Login : Monday, July 18, 2011 10:33:59 AM
Current Login : Monday, July 18, 2011 11:44:32 AM

Invoices

[Access Invoice](#)

Client News [List all](#)

08/19/2006 - [August 2006 EFT Processing News](#)
06/22/2006 - [June 2006 EFT Processing News](#)
07/25/2006 - [July 2006 EFT Processing News](#)
06/30/2006 - [July 2006 eFunds Network Compliance Bulletin](#)
04/03/2006 - [May 2006 EFT Processing News](#)

Welcome superAdmin

[Update my profile](#)

Services

Penley [Open](#)

NEWS: When you click a link in the Documentation, Training, or News sections of eFunds Online, does the content take too long to display? Adobe® fixed this problem in V6.0.1 of their Acrobat® Reader, so you may want to upgrade the version of Reader on your PC. For a complete discussion of the issue and resolution see the Adobe support knowledgebase at http://help.adobe.com/en_US/Reader/8.0/help.html?content=W558a04a822e3e50102bd615109794195f-7f9f.html

Discovery will be available as a **service** in the eAccess portal.



User Administration

User Administration

What will happen to our users?



Verification Checks

- > ID Verification
- > Business Verifications
- > OFAC Only Check
- > Quali File (NAC)
- > Quali File (NAC) Bus.
- > Address Analysis
- > ID Authentication
- > Background Check

Batch Checks

- > ID Verification
- > Business Verifications
- > OFAC
- > FinCen 314(a)
- > Quali File (NAC)

Reporting

- > Verification Reports

CHEX SYSTEMS, INC.

Click here to [send an e-mail message](#) to all the active users **or**
Click here to [CREATE A NEW USER](#) **or**
Click below to edit a current user.

Non-Migrated Active Users

User Name	Type
2 venkata namachivayam	IM Admin

Migrated Users

User Name	Type
0 SHEIK ASAN	IM Admin

There will be now be the concept of two sets of users:

Non-Migrated and Migrated users.

Non-Migrated users will still be fully editable in Discovery.

Migrated users will be editable in the eAccess portal and Discovery.

User Administration

What will happen to our users?



Editing the User 'Arul'

* First Name	Arul
Middle Name	Sundaram
* Last Name	Antony
*Email Address	e1010675@yahoo.com
Suffix	A
* Login	arul.sundar.antony
* Password
* Re-Confirm Password
Password Expires (After)	Never
Force password change on next login	<input type="checkbox"/>
Responsibility Code	PAA
<small>Note: Max field length is 20 characters</small>	
Role	Penley Admin
Deactivated	<input type="checkbox"/>
Locked-out	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Only certain parts of a **Migrated** User will be editable in Discovery, un-editable attributes will be grayed and disabled and must be edited in the eAccess portal.

User Administration

What will happen to our users?



Verification Checks

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Migrated Users

User Name	Type
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During the transition period, to create new users you should:

- Create the user in Discovery.
- Ask the user to log into Discovery and follow the migration to the eAccess portal.

After the transition period all un-migrated users will be deactivated and all user administration will be moved to eAccess.



FAQ

FAQ



Q. When will migration begin for the Discovery Staging environment?

Migration for Discovery Staging began on January 21, 2012.

Q. When will migration begin for the Discovery Production environment?

Migration will begin for the Discovery Production on March 6, 2012.

Q. Are there separate staging and production systems?

Yes, there are staging and production environments for both Discovery and eAccess.

Q. After installation, when will the customers start migration?

Beginning on March 6, customers will start going through the migration process when they log into Discovery.

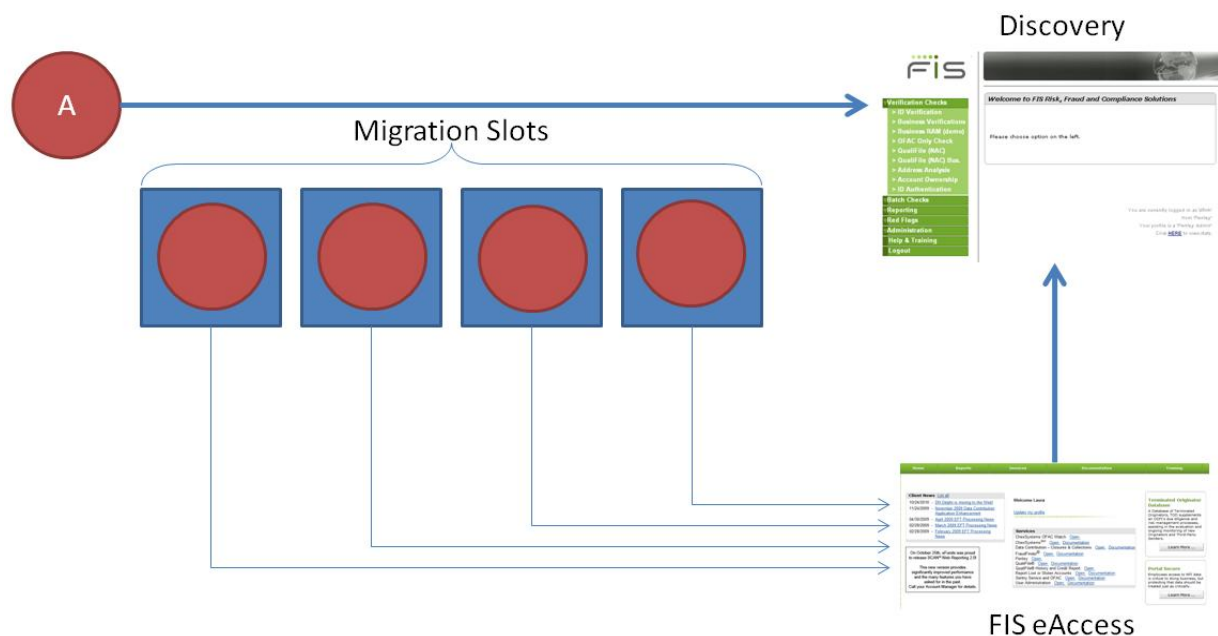
Q. Will any users be auto-migrated?

No, users are migrated when they log in and no auto-migration of users will occur.

FAQ



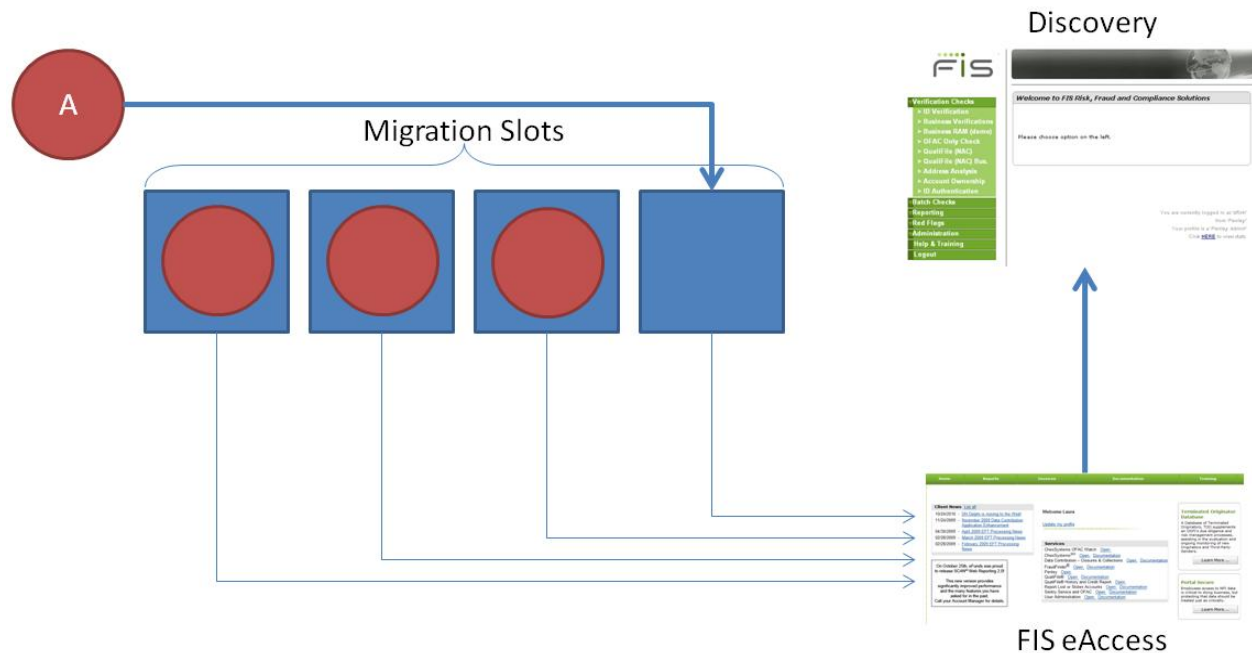
Q. Will all users migrate the first time they log into Discovery after March 6?
No. In order to ensure the migration process does not flood the system, a limited number of users can migrate at once. Migration time takes approximately 3 minutes. If all migration slots are full and a user logs into Discovery, the user will bypass the migration process and access Discovery normally as illustrated below.



FAQ



Eventually the user will log in and there will be an open migration slot. At that time, the user will go through the migration steps as illustrated below.



FAQ



Q. Will SOAP web service credentials need to be migrated?

At this time, no. Customers that access Discovery through SOAP will not be migrated. They will, however, migrate in the future.

Q. Can users use their existing username in Discovery?

Most likely not, FIS eAccess requires an e-mail address to be used for a username. Migrating users will be asked to use their e-mail address as a username.

Q. What are the new password rules?

Discovery users will now follow the same password rules and password reset procedures as eAccess users. eAccess password reset are set at 45 days.

Q. What if a user has more than one user ID in Discovery?

Users can migrate several Discovery user IDs into the same eAccess user ID.

Q. What if a user already has an eAccess user ID?

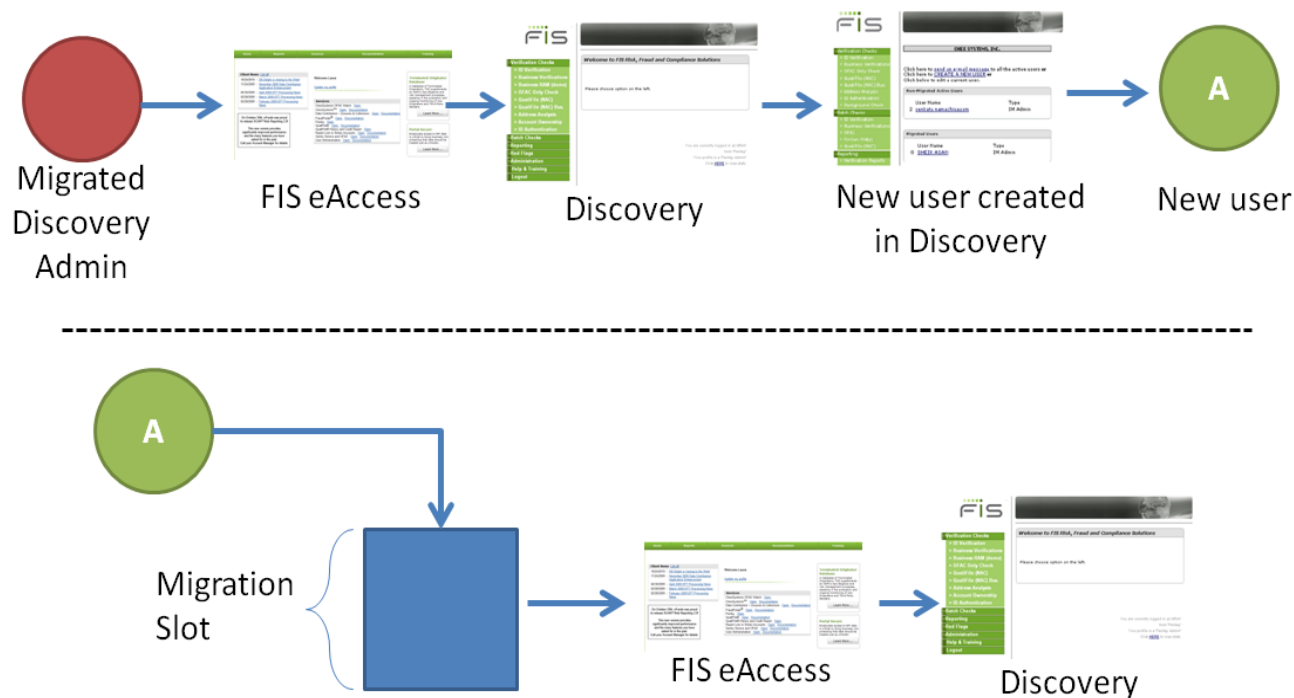
Discovery users can be migrated into (combined with) existing eAccess users.

FAQ



Q. How must new users be created?

To create new users that have access to Discovery applications, the Discovery Admin user will need to create the new user in Discovery. Once the new user is created, he will be migrated when he logs into Discovery as illustrated below.



FAQ



Q. Can new users be created in eAccess only for Discovery?

No. Currently eAccess does not provide a way to assign the Discovery applications to a new user. This is only done when the user migrates from Discovery. See the previous question for details on how to create a new user within Discovery.

Q. After a user is migrated, where can they be administered?

Some details, like the username and password etc can be administered in eAccess and is not available in Discovery after the user is migrated. Other details like the users Discovery role can only be administered in Discovery. User activations and deactivations must be done in eAccess.

Q. How do I activate my deactivated users in Discovery?

Please contact Member Solutions with your organization code and the users login name and the user will be activated by FIS staff.

FAQ



Q. How long will the migration period be and how will we know how many users migrated?

The migration period depends on how many users use the system. You can track the progress in the migrated and unmigrated sections of the user administrations screens.

Q. What happens after the migration period?

Users that have not migrated will be deactivated after the migration period and will have to contact Member Solutions to be reinstated.

Q. What if a user wants to migrate after the migration period?

The user will need to be reactivated by contacting Member Solutions with the organization code and users login name. The user will then be allowed to go through the migration.

FAQ



Q. What happens if a user tries to log into Discovery after they've migrated their Discovery User ID?

If the user logs in using their previous Discovery credentials, Discovery will state that the User ID/Password combination is invalid.

If the user logs into Discovery using his or her new eAccess credentials, Discovery will verify the User Name and Organization (not the password) and redirect the user to the eAccess log in page.

Q. Will IP restriction be impacted?

IP restriction will happen as it does today in Discovery and the eAccess portal.

Q. When will the next phases be delivered?

At this time the implementation of phase 2 has not yet been determined. We will communicate those as soon as we complete phase 1.

Contact Details



Recordings to our customer presentation from August, 2011 can be found [here](#).

To migrate a deactivated user or for any other queries or assistance, please contact:

Member Solutions

MSOL@fisglobal.com

1-800-207-2742



Thank You