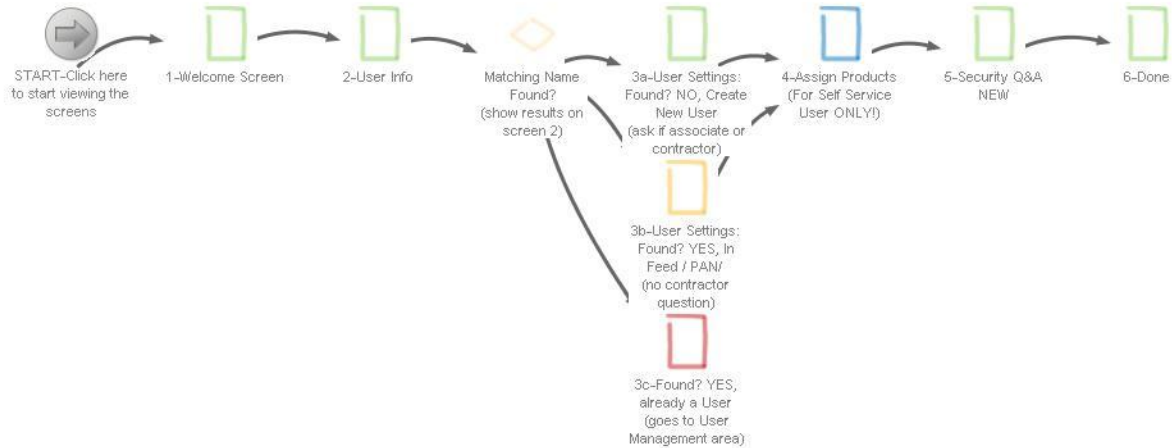


# **iSI - Netsecure - Add User - ClientAdminFlow**

Generated from iRise  
04/14/11 12:31 PM

# 1 Client Admin: Add User Flow



- 1.1 GREEN: "Happy Path" for Client Admin adding a brand new user  
 BLUE: Indicates optional/conditional step  
 ORANGE: User found in ADP db, but not yet registered in Netsecure  
 RED: Stops add new user process, exact match found in Netsecure
- 1.2 WELCOME SCREEN: From the Welcome screen, under User, select Add.
- 1.3 ENTER NAME: System searches for match, this action captures required info that will pre-populate if a new user must be created.
- 1.4 NO, CREATE NEW USER: Search process does not result in a match, a new user must be created.
  - 1.4.1 Add User process begins
- 1.5 YES, ASSOCIATE IN FEED/PAN/FEDERATED: This person is found, perhaps in a payroll feed, but not yet a Netsecure user.
  - 1.5.1 Enter into Add User process
- 1.6 YES, ALREADY A USER: This person already exists in the Netsecure database. System puts them within the "Manage User" area for that individual.
  - 1.6.1 User settings may be changed here.
- 1.7 ASSIGN PRODUCTS: Is conditional. Only presented if creating a Self Service User.
- 1.8 USER ID AND SECURITY Q&A: UID is issued and displayed along with the assigned User Role. Security Question and Answer is set.
- 1.9 DONE: Option to Assign Profiles: Scenario ends on the (new) Manage User area. If applicable, profiles may be assigned.

## 2 0\_How to Review an iRise Simulation

**Welcome to an iRise Simulation!**

You're about to experience the next generation of visual application definition - an iRise simulation that lets users "test drive" business systems before any coding.

**Review the Simulation in iRise Reader**


Once you launch Reader, you will notice two primary views: Document View and Simulation View. Use the tabs in the upper left area to switch between the two views. Also, by clicking on the bar at the bottom of the top toolbar, all iRise toolbars can be toggled on/off.

[Go to Scenario Start Page](#)

[Open as PDF](#)

Expand/Collapse Directory



**Simulation View**

In this View, you can see and interact with the application pages to provide a realistic feel for the production application based on the requirements you are defining.

**Document View**

- In this View, you can see the textual requirements that are added to the project in Studio Document View. While in Document View, you can also view requirement attributes or interact with the simulation.

Comment Panel: OFF    Guides: OFF

Add Comment

**Guides**

- Guides help you navigate through the simulation. Turn on the Guides by clicking on the green OFF button in the bottom toolbar. When the OFF changes to ON, the Guides are on.

**Comment**

- Comments allow you to provide comments or feedback on the simulation.
- Turn on the Comment Panel to view Comments by clicking on the green OFF button in the bottom toolbar. When the OFF changes to ON, the Comments Panel is displayed.
- You can also add comments to the simulation using the 'Add Comment' button on the bottom toolbar. You can provide your comment in the textarea and associate to a widget on the screen. Click on 'associate to widget', then point the mouse to a page widget and click save to create a comment.

10 of 54

True Logic ON

First Page/ Page Back    Page Forward/ Last Page    Toggle Logic

**Page Back/Forward**

- Use the arrows to navigate through the chapters of the Simulation, moving through Scenario, Pages, Master, etc.

**Toggle Logic**

- You can turn off the built-in simulation logic by toggling the TrueLogic setting.

Link to Start Page

SimBank / 1.0 Online Banking Login

Export to MS Word  
Close File

File    View


View Options

**Start Page**

- Click the Simulation/Page Title link at the top of the screen to return to the Start page of the Simulation.

**File/View Menus**

- Access the File and View Menus to Export to MS Word, Close the Simulation, and change your Viewing options.




This is the area where you would write requirements to annotate the simulation.

04/14/11

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### 3 0\_Scenario Start Page

**[Project] [Version]**

This is the scenario start page for the iRise Interactive Document (iDoc). This iDoc provides a simulation (aka visual representation of requirements) of functionality for the *[Project]* project.  
Description: *[desc]*.

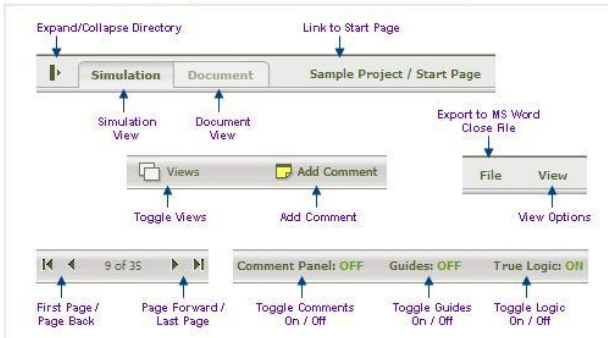
In order to assist with the navigation and use of the simulation please ensure that Guide/walkthrough notes have been enabled. Enable the Guide now by clicking on the icon located in the iRise bar in the bottom left corner of the page.


The scenarios listed below are active within this iDoc. Please click a scenario name to start the associated simulation.

Scenario A:	<input type="checkbox"/> <a href="#">Client Admin Add User Flow</a>
Scenario B:	<input type="checkbox"/> <a href="#">ADP Admin Add User Flow</a>

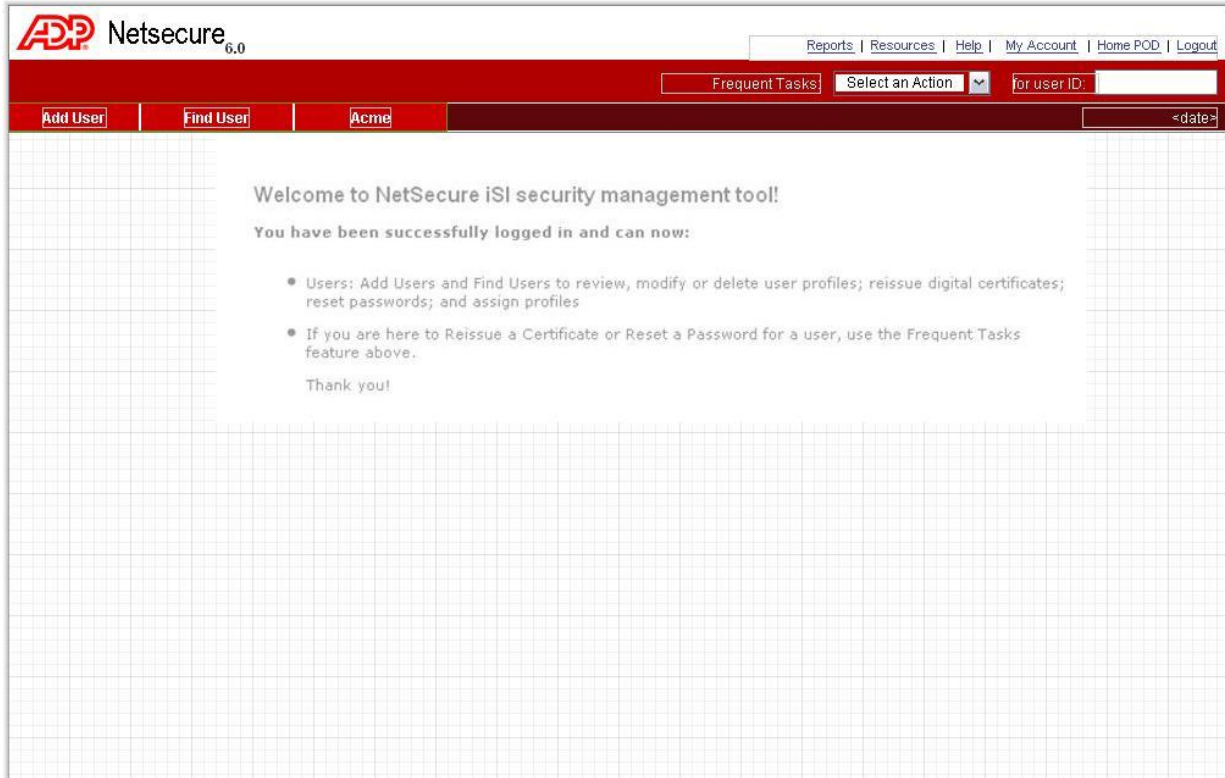
[Change Log](#)

**Toolbar Controls:** [View more about how to review the simulation](#)



The home icon  has been added to every page of the simulation. Click it at any time to return to this scenario start page.

## 4 1-Welcome Screen



LOGIN - User logs into Netsecure and comes to "Welcome" screen.

MENU ITEM - Under "Users" select "Add"

## 5 2-User Info

ADP Netsecure 6.0

Reports | Resources | Help | My Account | Home POD | Logout

Frequent Tasks | Select an Action | for user ID: [ ]

Add User | Find User | Acme | <date>

### Add User

> Enter User Info > Select User Settings > Set Security Q&A

Enter the user's information requested on this screen.

\* = Required [Tips](#)

\* First Name: [ ]

\* Last Name: [ ]

\* E-mail Address: [ ]

Social Security Number

Employee ID

None

[ ] [ ]  
Enter again to confirm

<< Back | Next >> | Cancel

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REQUIRED INFO: First Name, Last Name, E-mail are required fields.

OPTIONAL: Social Security Number and Employee ID are optional and exclusive, user may enter on, the other or none. Default state prompts user to enter SSN.

NEXT BUTTON: Searches system for all potential matches.

MESSAGE: If system returns no users, display informational message directing user to click (enabled) Add New User button

DATA CAPTURE: Input values are captured for use if New User process continues.

PAGINATION: Not representative of data, for concept only.

If one user is found, disable Add New User button-- confirm with with Pawan

Add new User button is ONLY available when either email, ssn, emp id is NOT found -- confirm with with Pawan

ADD NEW USER BUTTON: Begins the process wizard to create a New User.

\*\*\*\* Do NOT mask Emp ID

## 6 2.5a-User Search Result (no match found)

The screenshot shows the Netsecure 6.0 user search interface. At the top, there is a navigation bar with links for Reports, Resources, Help, My Account, Home POD, and Logout. Below this is a red header with 'Frequent Tasks', 'Select an Action', and a search box for 'for user ID:'. The main content area is titled 'Add User' and contains a wizard with three steps: 'Enter User Info', 'Select User Settings', and 'Set Security Q&A'. The 'Enter User Info' step is active and contains the following fields:

- \* First Name: [First Name]
- \* Last Name: [Last Name]
- \* E-mail Address: [E-mail Address]
- Social Security Number:
- Employee ID:
- None:

Below the form, a message states 'No Records Found' with an 'Add New User' button. A table with the following columns is displayed:

Last Name	First Name	User ID	E-mail Address	Last 4 Digits of SSN	Employee ID

At the bottom of the form, there are navigation buttons: '<<Back', 'Next>>', and 'Cancel'. The footer contains copyright information and links for SITE INDEX, PRIVACY, and LEGAL.

REQUIRED INFO: First Name, Last Name, E-mail are required fields.

OPTIONAL: Social Security Number and Employee ID are optional and exclusive, user may enter one or the other. Default state, neither are selected.

NEXT BUTTON: If there are no records found, Next is disabled.

MESSAGE: If system returns no users, display informational message directing user to click (enabled) Add New User button

DATA CAPTURE: Input values are captured for use if New User process continues.

PAGINATION: Not representative of data, for concept only.

ADD NEW USER BUTTON: Begins the process wizard to create a New User.

If exact match found, disable Add New User button - confirm with with Pawan



## 7 2.5b-User Search Result (result Doe-Ray)

ADP Netsecure 6.0

Reports | Resources | Help | My Account | Home POD | Logout

Frequent Tasks | Select an Action | for user ID: [ ]

Add User | Find User | Acme

**Add User**

> Enter User Info > Select User Settings > Set Security Q&A

Enter the complete user information requested on this screen.

\* = Required [Tips](#)

\* First Name: [First Name]  Social Security Number

\* Last Name: [Last Name]  Employee ID

\* E-mail Address: [E-mail Address]  None

[Social Security] [Social Security]  
Enter again to confirm

**i** There are multiple users associated with this information. To add a new user, not included in the results, click **Add New User**.  
**Note:** To perform user maintenance tasks on existing users (included in the results), select the user record and click **Next**.

7 Records Found [Add New User](#)

	Last Name	First Name	User ID	E-mail Address	Last 4 Digits of SSH	Employee ID
<input type="radio"/>	Doe	Amy	AD-123	a-doe1@acme.com		
<input type="radio"/>	Doe	Amy		amy_doe@acme.com		
<input checked="" type="radio"/>	Doe-Rayme	Amy	AD-345	a-doe@acme.com		
<input type="radio"/>	Doe	Arnold		a.doe@acme.com		

<<Back | Next>> | Cancel

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REQUIRED INFO: First Name, Last Name, E-mail are required fields.

OPTIONAL: Social Security Number and Employee ID are optional and exclusive, user may enter one or the other. Default state, neither are selected.

RADIO BUTTONS: Within the result set, radio selects a pre existing individual. One radio must be selected if Next button is to be clicked.

NEXT BUTTON: is conditional in the fact that next stp/screen is dependent upon status and role of selected record.

MESSAGE: If system returns no users, display informational message directing user to click (enabled) Add New User button

DATA CAPTURE: Input values are captured for use if New User process continues.

PAGINATION: Not representative of data, for concept only.

ADD NEW USER BUTTON: Begins the process wizard to create a New User.

If exact match found, disable Add New User button - confirm with with Pawan



## 8 3a-User Settings: Found? NO, Create New User

The screenshot shows the 'Add User' wizard in Netsecure 6.0. The current step is 'Select User Settings'. The form includes the following elements:

- Name:** Fields for `FirstName` and `LastName`.
- E-mail Address:** Field for `EmailAddress`.
- User Type:**
  - User will be included in your <Autopay> system(s).**
  - User is an independent contractor**, consultant, offshore associate or another type of person and will not be included in your <Autopay> system(s).
- User Role:**
  - Self Service User:** User can access ADP services to view their company and personal information.
  - Product User:** User can be assigned profiles to administer ADP products such as Payroll, HR, Benefits, etc. User cannot perform security tasks in Netsecure. If required, user may be promoted to the security role of User Master or User Admin to perform limited security tasks such as resetting passwords or reissuing certificates, but still cannot create users or assign product profiles.
  - Security Administrator:** User can create Product Users, reset passwords, and reissue certificates in Netsecure. In addition, user can be assigned profiles to administer ADP products.
  - Security Master:** User can perform all the tasks of Security Administrator. In addition, user can create other Security Masters and Security Administrators and can be assigned profiles to administer ADP products.
- Navigation:** '<<Back', 'Next>>', and 'Cancel' buttons.

FIRST NAME; LAST NAME; E-MAIL ADDRESS: Are auto-populated with data input from previous "Search" screen.

USER TYPE RADIO BUTTONS: Associate or Contractor. Default is Associate. This is the Certificate Download Information (formerly a check box)

NEXT BUTTON: Saves data, proceeds to nexts screen of wizard.

CANCEL BUTTON: Returns user to the "Search" screen

USER ROLE RADIO BUTTONS:

\*\*\*Self Service User is dynamic, upon hitting Next for SSU, User presented with a choice, if applicable

## 9 3b-User Settings: Found? YES, In Feed / PAN/ Federated User

ADP Netsecure 6.0

Reports | Resources | Help | My Account | Home POD | Logout

Frequent Tasks: Select an Action for user ID: <date>

Add User Find User Acme

### Add User

> Enter User Info > **Select User Settings** > Set Security Q&A

Name:  E-mail Address:  <variable>

**User Access Role:**

- Self Service User:** User can access ADP services to view their company and personal information.
- Product User:** User can be assigned profiles to administer ADP products such as Payroll, HR, Benefits, etc. User cannot perform security tasks in Netsecure. If required, user may be promoted to the security role of User Master or User Admin to perform limited security tasks such as resetting passwords or reissuing certificates, but still cannot create users or assign product profiles.
- Security Administrator:** User can create Product Users, reset passwords, and reissue certificates in Netsecure. In addition, user can be assigned profiles to administer ADP products.
- Security Master:** User can perform all the tasks of Security Administrator. In addition, user can create other Security Masters and Security Administrators and can be assigned profiles to administer ADP products.


<<Back Next>> Cancel

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NOTE: Do not show Self Service User option for Feed Only associates.

## 10 3c-Found? YES, already a User



[Reports](#) | [Resources](#) | [Help](#) | [My Account](#) | [Home POD](#) | [Logout](#)

Frequent Tasks
Select an Action 
for user ID:

Add User
Find User
Acme
<date>

**Manage User > Leslie Anders**

**View User Info**

**Edit User Info**

**Assign Profiles**

**Reset Password**

**Reissue Certificate**

**Remove Certificate**

**Change Status**

**Delete**

**View User Info**

**Personal Info**

<b>Name:</b>	Leslie Anders	<b>User ID:</b>	AD-123
<b>Email:</b>	leslie	<b>Phone Number:</b>	973-974-6945

**User Settings**

**Status:** Active

**User Access Role:** **Product User:** User can be assigned profiles to administer ADP products such as payroll, HR, Benefits, etc. User cannot perform security tasks in Netsecure.

**User Type:** This user is an independent contractor, consultant, offshore associate or another type of person not included in your <Autopay> system(s) and ADP cannot verify this user's identity. (This user will not be asked to verify their identity during the certificate download process.)

**Certificate Download Information**

**Temporary Security Question:** What was the name of your first pet?

**Temporary Security Answer:** Fido

**Business Address**

**Country:** USA

**Business Address 1:** 3 ADP Blvd

**Business Address 2:**

**Business Address 3:**

**City/Town:** Roseland

**State/Province:** New Jersey

**Zip/Postal Code:** 07068

**Additional Info**

**Notes:**

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## 11 4-Assign Products

The screenshot displays the Netsecure 6.0 user management interface. At the top, the ADP Netsecure 6.0 logo is on the left, and navigation links for Reports, Resources, Help, My Account, Home POD, and Logout are on the right. Below the logo is a red navigation bar with buttons for 'Add User', 'Find User', and 'Acme'. A search bar contains 'Frequent Tasks', a dropdown menu for 'Select an Action', and a text field for 'for user ID:'. A '<date>' button is also present.

The main content area is titled 'Add User' and features a breadcrumb trail: '> Enter User Info > Select User Settings > Set Security Q&A'. The 'Select User Settings' step is currently active. Below the breadcrumb, there are input fields for 'Name: FirstName LastName' and 'E-mail Address: EmailAddress'. A green box highlights the 'Assign ADP Services' section, which includes the instruction 'Select the ADP services to which the user requires access.' and a 'Select a Service:' label. Two services are listed with checkboxes: 'Homepage Portal' and 'Virtual Edge'. At the bottom of this section are three buttons: '<<Back', 'Next>>', and 'Cancel'. The footer contains copyright information: 'Copyright © 2008 ADP Inc., Portions Copyright © 2003' and links for 'SITE INDEX', 'PRIVACY', and 'LEGAL'.

## 12 5-Security Q&A NEW

ADP Netsecure 6.0

Reports | Resources | Help | My Account | Home POD | Logout

Frequent Tasks | Select an Action | for user ID: <date>

Add User | Find User | Acme

### Add User

> Enter User Info > Select User Settings > **Set Security Q&A**

#### View ADP Services User ID

User has been created with the user ID provided below.

User ID:

An e-mail with the instructions to access ADP services will be sent to the e-mail address provided below.  
**Note:** To send this e-mail to an alternate e-mail address, enter it in the field below.

E-mail Address:

#### Select Security Question and Answer

Select the temporary security question and enter the temporary security answer. Provide this information to the user immediately and in a secure communication, either in person, by phone or e-mail. User must change this information after logging on to their ADP service.  
**Note:** Security answer must be at least 6 characters long.

\* = Required

\* Temporary Security Question


\* Temporary Security Answer

<<Back | Submit | Cancel

TEMPORARY SECURITY QUESTION AND ANSWER: Are required



### 13 6-Done



[Reports](#) | [Resources](#) | [Help](#) | [My Account](#) | [Home POD](#) | [Logout](#)

Frequent Tasks
Select an Action ▼
for user ID:

Add User
Find User
Acme
<date>

**Manage User > Leslie Anders**

**Congratulations!** The user ID **UserID** has been assigned to **FirstName.LastName**.  
 To provide administrator access to your ADP services, assign a profile to this user.

#### View User Info

**Personal Info**

<b>Name:</b>	Leslie.Anders.	<b>User ID:</b>	UserID
<b>Email:</b>	EmailAddress	<b>Phone Number:</b>	973-974-6945

**User Settings**

**Status:** Active

**User Access Role:** **Product User:** User can be assigned profiles to administer ADP products such as payroll, HR, Benefits, etc. User cannot perform security tasks in Netsecure.

**User Type:** This user is an independent contractor, consultant, offshore associate or another type of person not included in your <Autopay> system(s) and ADP cannot verify this user's identity. (This user will not be asked to verify their identity during the certificate download process.)

**Certificate Download Information**

**Temporary Security Question:** What was the name of your first pet?

**Temporary Security Answer:**

**Business Address**

**Country:** USA

**Business Address 1:**

**Business Address 2:**

**Business Address 3:**

**City/Town:** Roseland

**State/Province:** New Jersey

**Zip/Postal Code:** 07068

**Additional Info**

**Notes:**

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## 14 Tips

If you are unsure of the client's exact ID, use \* as a wildcard character to substitute the unknown characters. You must enter at least three characters when using wildcard characters in your search.

For example, to find the client "My Test Company" with the client ID "MTC 2009" ; you can enter one of the following phrases :  
MTC\*, \*2009, \*200\*

Do not use (\*) between the characters included in the search.

