



# MUFG Exchange Administration Console



**USER GUIDE**

**EFFECTIVE NOVEMBER 2021**

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## Overview

Managing users and services has become easier than ever for your organization's Web Administrators. MUFG Bank MUFG Exchange features streamlined everyday user access, administration, and account management tasks, giving you the power to make decisions and expedite changes quickly online.

- Enroll users for new services online.
- Make decisions about who has access to which services.
- Set up new users and/or delete users to accommodate changes in staff.
- Lock out or reset tokens and manage user security settings.
- Quickly access a 90-day history of service requests.

All of these tasks can be accomplished easily through the Administration Console, which is available to Web Administrators.

Using the administrative and management features of MUFG Exchange requires the role of Web Administrator to one or more individuals on your staff. The chart below provides examples of key stakeholder roles and responsibilities.

Web Administrators	Users
Designated employees who can manage employee access to online services and perform the day-to-day activities.	Employees of the company.
<ul style="list-style-type: none"><li>• Manage user accounts</li><li>• Create new users access and assign to services</li><li>• Manage security tokens</li></ul>	<ul style="list-style-type: none"><li>• Granted access to use specific online services with entitlements as defined by Web Administrators.</li></ul>

### Communicating securely with MUFG Bank

The Message Center is the fast, convenient way to receive, send, and view confidential messages online. It is the only secure method for sending messages and documents directly to customer service.

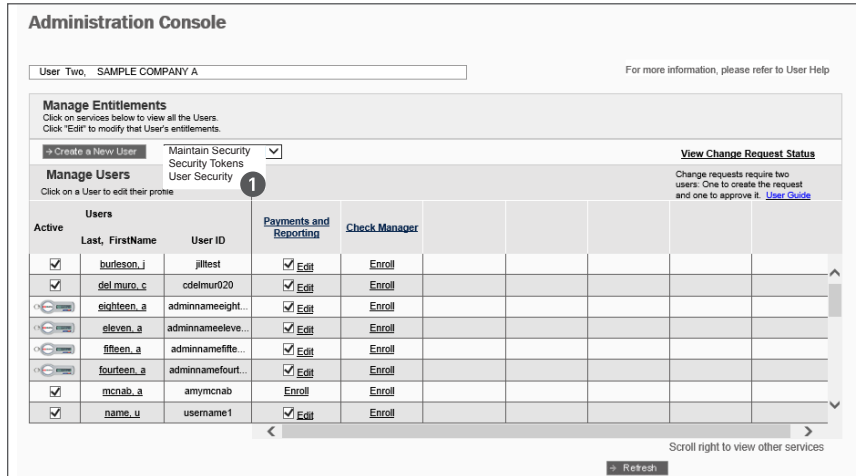
#### FOR MORE INFORMATION

If you have questions, please contact customer service at: **844-544-0387**, Monday through Friday, excluding federal holidays, 8:00 a.m. to 7:00 p.m. ET.

## Change Security Settings

The user security settings feature allows you to easily manage the automatic expiration of user access and lock inactive users. These settings can be modified at any time, and changes will take effect immediately.

- 1 On the Administration Console, select **User Security Settings** from the Maintain Security drop-down.



**Administration Console**

User Two, SAMPLE COMPANY A For more information, please refer to User Help

**Manage Entitlements**  
Click on services below to view all the Users  
Click "Edit" to modify that User's entitlements

[Create a New User](#) **Maintain Security**  [View Change Request Status](#)

**Manage Users** **User Security** Change requests require two users: One to create the request and one to approve it. [User Guide](#)

Click on a User to edit their profile

Active	Users	Payments and Reporting	Check Manager						
	Last, FirstName	User ID							
<input checked="" type="checkbox"/>	burleson, j	jilbest	<input checked="" type="checkbox"/> Edit	Enroll					
<input checked="" type="checkbox"/>	del muro, c	cdelmur020	<input checked="" type="checkbox"/> Edit	Enroll					
<input type="checkbox"/>	eighteen_a	adminnameeight...	<input checked="" type="checkbox"/> Edit	Enroll					
<input type="checkbox"/>	eleven_a	adminnameeleve...	<input checked="" type="checkbox"/> Edit	Enroll					
<input type="checkbox"/>	fifteen_a	adminnamefifte...	<input checked="" type="checkbox"/> Edit	Enroll					
<input type="checkbox"/>	fourteen_a	adminnamefour...	<input checked="" type="checkbox"/> Edit	Enroll					
<input checked="" type="checkbox"/>	mcnab, a	amymcnab	Enroll	Enroll					
<input checked="" type="checkbox"/>	name_u	username1	<input checked="" type="checkbox"/> Edit	Enroll					

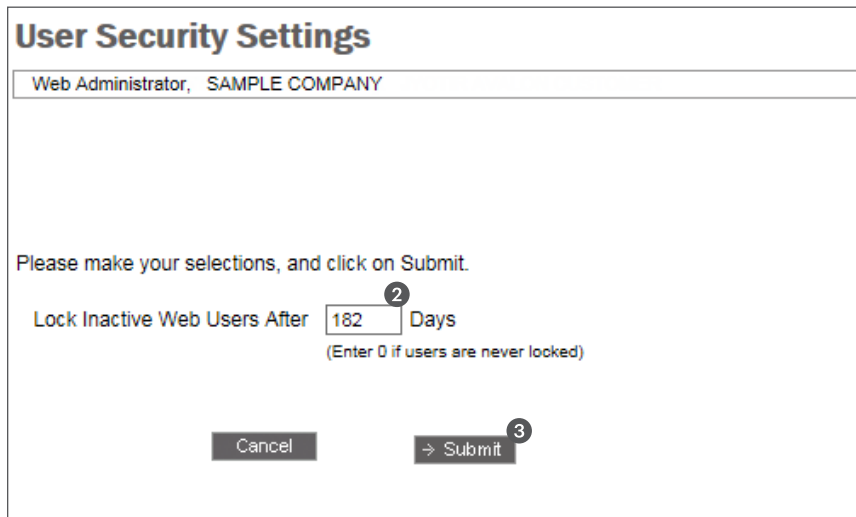
Scroll right to view other services

[Refresh](#)

- 2 Enter the number of days of inactivity which will result in the user's access being locked.

The inactive user lock can be set between 0 and 999 days.

- 3 Click **Submit** to complete the change.



**User Security Settings**

Web Administrator, SAMPLE COMPANY

Please make your selections, and click on Submit.


Lock Inactive Web Users After  Days  
(Enter 0 if users are never locked)

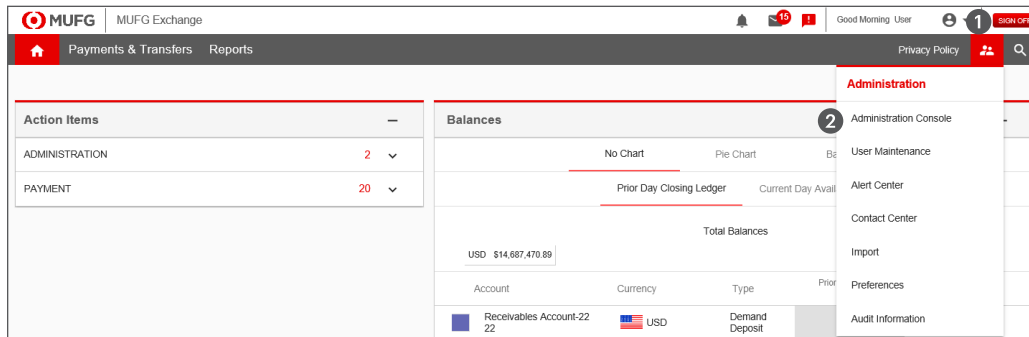
## Manage User Access

It's easy to manage user access to MUFG Exchange day or night, seven days a week, in a safe, secure\* environment.

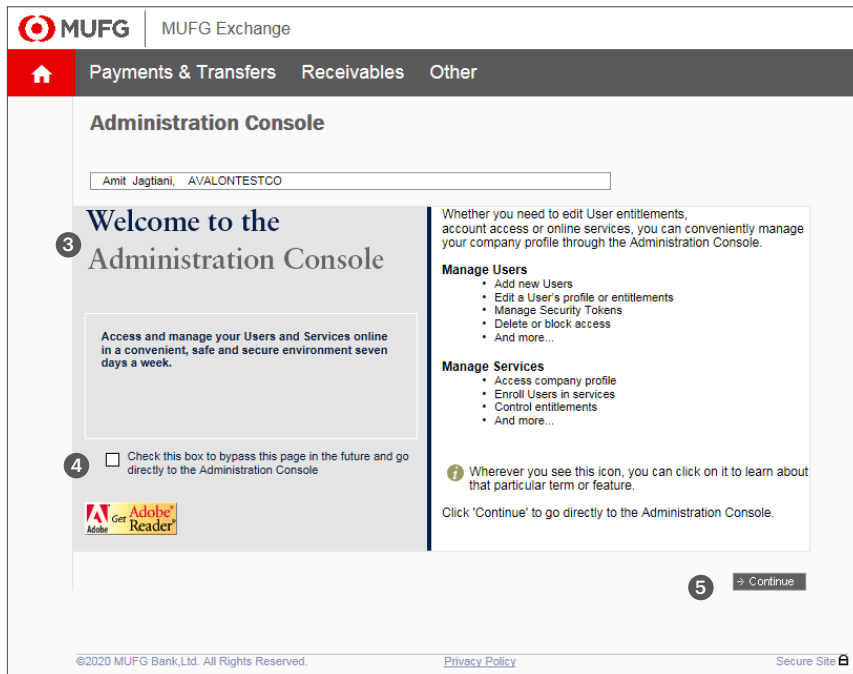
### Access the Administration Console

Sign on to MUFG Exchange at <https://sso.mufgamericas.com/login/auth>.

- 1 Click the  icon located at the top right side of the menu bar.
- 2 Select **Administration Console** from the drop-down menu.



- 3 This will take you to the **Administration Console** Welcome page.
- 4 Select the check box to bypass the Welcome Page, if applicable. If checked future logins will take you directly to the Administration Console page.
- 5 Click Continue.



\*To enhance security for your accounts, MUFG Exchange requires 1024-bit encryption.

## Manage User Access

From the Administration Console page, you can create new users, manage users' access, edit profiles, delete users, and reset passwords.

### Create a new user

- 1 On the Administration Console, click **Create a New User**.

The screenshot shows the Administration Console interface. At the top, there's a header 'Administration Console' and a search bar containing 'User Two, SAMPLE COMPANY A'. Below this is a 'Manage Entitlements' section with instructions to click on services to view users or edit entitlements. A red circle '1' is placed over the 'Create a New User' button in the 'Manage Users' section. The 'Manage Users' section includes a table with columns for 'Active', 'Last, FirstName', 'User ID', 'Payments and Reporting', and 'Check Manager'. The table lists several users, including 'burleson\_j', 'delmuro\_c', 'eighteen\_a', 'eleven\_a', 'fifteen\_a', 'fourteen\_a', and 'mcnab\_a'. Each user has a checkbox for 'Active' and buttons for 'Edit' and 'Enroll'.

- 2 Enter the required information.
- 3 Designate the user as either a Web User or Web Admin. Web Admins have the authority to add/delete/edit user profiles and to manage tokens.
- 4 Select the Language preference.
- 5 Click **Submit** to complete the request.

**Note:** We highly recommend selecting the check box for high risk transactions to receive email notifications.

The screenshot shows the 'Create a New User' form. At the top, there's a search bar with 'User Two, SAMPLE COMPANY A'. Below this is a message: 'Please complete the information below and click 'Submit' to create a new User. You can enroll the new user in each service individually. \* Denotes a required field.' The form fields are: 'User ID' (sampleuserid), 'First Name' (Sample), 'Middle Name' (empty), 'Last Name' (User), 'Work Number' (999, 999, 9999), 'Mobile 1' (empty), 'Email' (sample@email.com), and 'Confirm Email' (sample@email.com). There are three numbered red circles: '2' over the User ID field, '3' over the User Type section (Web Admin is selected), and '4' over the Language section (English is selected). There are also checkboxes for 'Send High Risk Transactions email' (checked) and 'Notify user by email about offers, promotions, and new products' (unchecked). At the bottom, there are buttons for 'Admin Console', 'Reset', and 'Submit'.

## Manage User Access

### Edit user profiles and reset tokens

- 1 From the Manage Users section of the Administration Console, click the **Last, FirstName** of the user whose profile and/or token you want to change. This will bring you to the Edit User Profile page.
- 2 Click **Edit User Info**. Update the user's profile by entering new information where needed.
- 3 Use the Security Maintenance section to lock or unlock the user's access, manage user phones, assign security tokens, and permanently delete users.

A user's access can also be disabled or enabled from the Administration Console by respectively removing or adding a check mark under the Active column.

**Administration Console**

User Two, SAMPLE COMPANY A

**Manage Entitlements**  
Click on service below to view all the Users. Click "Edit" to modify that User's entitlements.

→ Create a New User | Maintain Security | View Change Request Status

**Manage Users**  
Click on a User to edit their profile

Active	Last, FirstName	User ID	Payments and Reporting	Check Manager
<input checked="" type="checkbox"/>	thirty_u	username thirty_u	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	three_u	username three_u	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	twelve_a	adminname twelve_a	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	twenty_a	adminname twenty_a	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	two_u	username two_u	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	user_s	sampleuserid	Enroll	Enroll
<input checked="" type="checkbox"/>	user_1	testuser23	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	william_m	william13	Pending Approval	Enroll

Scroll right to view other services

**Edit User Profile**

Web Administrator, SAMPLE COMPANY

User ID : **sampleuserid**

Last Valid Login :

Last Contact Info Review :

First Name : Sample

Middle Name :

Last Name : User

Email Address : sXXXXe@email.com

Send High Risk Transactions email : Yes

Notify user by email about offers, promotions, and new products : No

User Type : Web Admin

**Security Maintenance**

User Access Status: Unissued

Challenge Questions Status: Inactive

Last Challenge Questions Ch...

Manage User Phones

Lock User Access

Assign Security Token

Permanently Delete User

Note: Once a User is permanently deleted their entitlements cannot be copied to another User.

**Edit User Information**

\* = Required Field

User ID : **sampleuserid**

\* First Name :

Middle Name :

\* Last Name :

\* Email :

User Type :  Web User  Web Admin

Language :  English  Japanese

Send High Risk Transactions email

Notify user by email about offers, promotions, and new products

Cancel | Update

**User Information Updated**

User ID : **sampleuserid**

Date : 08/29/XX10:55 PDT

OK

## Manage User Access

### Delete users permanently

Deleting users permanently is appropriate if individuals leave the organization and you no longer need to use their profile to create new users.

- 1 On the Administration Console, under the Manage Users section, click the name of the user you want to delete.
- 2 On the Edit User Profile page, in the Security Maintenance section, select **Permanently Delete User**.
- 3 Click **Delete**, and you will receive a confirmation.

**Note:** Once you permanently delete a user, that user will be removed from the system and cannot be automatically reinstated.

**Administration Console**

User Two, SAMPLE COMPANY A For more information, please refer to User Help

**Manage Entitlements**  
Click on services below to view all the Users.  
Click "Edit" to modify that User's entitlements.

[Create a New User](#) | [Maintain Security](#) [View Change Request Status](#)

**Manage Users**  
Click on a User to edit their profile Change requests require two users: One to create the request and one to approve it. [User Guide](#)

Active	Users	Payments and Reporting	Check Manager				
	Last, FirstName	User ID					
<input checked="" type="checkbox"/>	thirty_u	usenamethirty	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	three_u	usenamethree	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	twelve_a	adminnametwelve...	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	twenty_a	adminnametventy...	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	two_u	usenametwo	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	user_s	sampleuserid	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	user_t	testuser23	Pending Approval	Enroll			
<input checked="" type="checkbox"/>	william_m	mwilliam13	Pending Approval	Enroll			

Scroll right to view other services [Refresh](#)

**Edit User Profile**

Web Administrator, SAMPLE COMPANY

[Edit User Info](#)

User ID : **sampleuserid**

Last Valid Login :

Last Contact Info Review :

First Name : Sample

Middle Name :

Last Name : User

Email Address : sXXXXe@email.com

Send High Risk Transactions email : Yes

Notify user by email about offers, promotions, and new products : No

User Type ? : Web Admin

**Security Maintenance** ?

User Access Status: **Unissued**

Challenge Questions Status: **Inactive**

Last Challenge Questions Change:

[Manage User Phones](#)

[Lock User Access](#)

[Assign Security Token](#)

**2** [Permanently Delete User](#)

**Note:**  
Once a User is permanently deleted, their entitlements cannot be copied to another User.

[Admin Console](#)

**Edit User Profile**

Web Administrator, SAMPLE COMPANY

[Edit User Info](#)

User ID : **sampleuserid**

Last Valid Login :

Last Contact Info Review :

First Name : Sample

Middle Name :

Last Name : User

Email Address : sXXXXe@email.com

Send High Risk Transactions email : Yes

Notify user by email about offers, promotions, and new products : No

User Type ? : Web Admin

**Security Maintenance** ?

User Access Status: **Unissued**

Challenge Questions Status: **Inactive**

**Permanently Delete User**

User ID : **sampleuserid**

You have selected to permanently delete this user from the Financial Center. Do you wish to continue?

**Note :** Once a User is permanently deleted, their entitlements cannot be copied to another User.

[Cancel](#) [Delete](#) **3**



## Control User Access to Services and Accounts

Controlling user access to services and accounts can be accomplished quickly, easily and securely. Requests can be submitted 24 hours a day, seven days a week.

### Add a user to a service

- 1 In the Manage Services section of the Administration Console, click **Enroll** under the service and on the line item of the user you will enroll.

**Administration Console**

User Two, SAMPLE COMPANY A For more information, please refer to User Help

---

**Manage Entitlements**  
Click on services below to view all the Users.  
Click "Edit" to modify that User's entitlements.

→ Create a New User Maintain Security View Change Request Status

**Manage Users**  
Click on a User to edit their profile Change requests require two users: One to create the request and one to approve it. [User Guide](#)

Active	Users Last, FirstName	User ID	Payments and Reporting	Check Manager			
<input checked="" type="checkbox"/>	thirty_u	usemamethirty	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	three_u	usemamethree	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	twelve_a	adminnametwelve...	<input checked="" type="checkbox"/> Edit	Enroll	1		
<input checked="" type="checkbox"/>	twenty_a	adminnametwent...	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	two_u	usemametwo	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	user_s	sampleuserid	<input checked="" type="checkbox"/> Edit	Enroll			
<input checked="" type="checkbox"/>	user_1	testuser23	Pending Approval	Enroll			
<input checked="" type="checkbox"/>	william_m	mwilliam13	Pending Approval	Enroll			

Scroll right to view other services

- 2 Click **Continue** to complete the request.

**Note:** Repeat this process for each service you want to make available to the user.

**Payments & Reporting Services**

---

The following user will be enrolled in Payments & Reporting services.

Customer Name : **SAMPLE COMPANY A**  
 User ID : **sampleuserid**  
 Last Name : **User**  
 First Name : **Sample**

Click continue to Create a New User and be directed to the User Maintenance Page.

2

## Control User Access to Services and Accounts

### Delete a user's access to a service

- 1 In the Manage Services section of the Administration Console, remove the check mark next to the service you wish to delete from the user.

**Administration Console**

User Two, SAMPLE COMPANY A For more information, please refer to User Help

---

**Manage Entitlements**  
Click on services below to view all the Users.  
Click "Edit" to modify that User's entitlements.

→ Create a New User | Maintain Security ▼ [View Change Request Status](#)

**Manage Users**  
Click on a User to edit their profile Change requests require two users: One to create the request and one to approve it. [User Guide](#)

Active	Users		Payments and Reporting	Check Manager				
	Last, FirstName	User ID						
<input checked="" type="checkbox"/>	burlison_j	jilltest	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	del.muro_c	cdelmur020	<input checked="" type="checkbox"/> Edit <b>1</b>	Enroll				
<input type="checkbox"/>	eighteen_a	adminnameeight...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	eleven_a	adminnameeeleve...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	fifteen_a	adminnamefifte...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	fourteen_a	adminnamefour...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	mcnab_a	amymcnab	Enroll	Enroll				
<input checked="" type="checkbox"/>	name_u	username1	Pending Approval	Enroll				

Scroll right to view other services

[Refresh](#)

- 2 Click Continue – The message “Are you sure you want to Un-Enroll this user?” will display.
- 3 Click **Continue** to confirm the request.

**Payments & Reporting Services**

---

The following User will be Un-Enrolled from Payments & Reporting Services

Customer Name : **SAMPLE COMPANY A**  
User ID : **testuser23**  
Last Name : **User**  
First Name : **Test**

Clicking continue will send an Un-Enroll Request to the Payments & Reporting Services system. Upon approval, User will be Un-Enrolled.

**2**

[Cancel](#) [→ Continue](#)

**Payments & Reporting Services**

---

The following User will be Un-Enrolled from Payments & Reporting Services

Customer Name : **SAMPLE COMPANY A**  
User ID : **testuser23**  
Last Name : **User**  
First Name : **Test**

**Are you sure you want to Un-Enroll this user?**

**3**

[Cancel](#) [→ Continue](#)

## Control User Access to Services and Accounts

It's easy to view a 90-day history of all submitted service change requests.

### View service change requests

- 1 On the Administration Console, click **View Change Request Status**.
- 2 On the Change Request Status page, click the arrow next to the column header, Submission Date, User Last Name, Service, Status, or Confirmation Number to sort the view.
- 3 Click **Confirmation Number** to view the details for each change request.
- 4 Select a record to see what was requested; the date the changes were submitted; and the status of the request.

Service Change Request Status Types:

- Completed
- Delayed
- Deleted
- Implemented
- Requires approval
- Submitted

**Administration Console**

User Two, SAMPLE COMPANY A For more information, please refer to User Help

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**Manage Entitlements**  
Click on services below to view all the Users. Click "Edit" to modify that User's entitlements.

[Create a New User](#) | [Maintain Security](#)

**1 View Change Request Status**  
Change requests require two users. One to create the request and one to approve it. [User Guide](#)

---

**Manage Users**  
Click on a User to edit their profile

Active	Users		Payments and Reporting	Check Manager				
	Last, FirstName	User ID						
<input checked="" type="checkbox"/>	burleson_j	jilltest	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	del muro_c	cdekmur020	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	eighteen_a	adminnameeight...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	eleven_a	adminnameeleve...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	fifteen_a	adminnamefifte...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	fourteen_a	adminnamefourt...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	mcnab_a	amymcnab	Enroll	Enroll				
<input checked="" type="checkbox"/>	name_u	username1	Pending Approval	Enroll				

Scroll right to view other services

[Refresh](#)

**Change Request Status**

Web Administrator, SAMPLE COMPANY

These are your service enrollment and change requests for the last 90 calendar days. You may sort this view by clicking beside each column header. Click on a confirmation number to see a change request in detail.

Submission Date	User Last Name	User First Name	Service	Status	Confirmation Number
08/29/XX	User	Sample	Check Manager	Implemented	<b>3</b> Q18-20180629-328811
08/29/XX	User	Sample	IP Address Restriction	Delayed	Q18-20180629-328816
08/29/XX	User	Sample	Global Delete User	Requires Approval	GDL-20180629-328821

[Admin Console](#)

**Record of Your Change Request**

User Two, SAMPLE COMPANY A

**4**

Service	Submitted by	Copy From	
service code GDL	Daniel DeLuca		
Confirmation Number	Submitted Date	Status	
GDL-20200629-227606	06/29/20	Implemented	
User	Remove	Change	Add
Ten, Admin	<input checked="" type="checkbox"/>		

[Administration Console](#) | [Change Requests](#) [Print](#)

## Exchange Confidential Information

### Exchange confidential information securely with MUFG Bank

Sign on to MUFG Exchange to access Message Center. Here you can send and view confidential messages with the security of 1024-bit encryption, a level of protection not available with email applications.

You can set up email notifications of new, incoming secure messages to any email address you choose. Confidential documents such as financial statements can be attached to your outgoing secure messages. Your messages will go directly to customer service.

For your protection, you should not use your personal or business email to send confidential financial information.

Action Items		—
ADMINISTRATION	3	▼
PAYMENT	25	▼

Balances		✎	—
No Chart   Pie Chart   Bar Chart			
Prior Day Closing Ledger		Current Day Available	

## MUFG Exchange Token Management Overview

A token is a device that is assigned to a specific user in order to provide additional security for authenticating user access to MUFG Exchange. A **token passcode** is used in place of a static password to sign onto MUFG Exchange.

The **token passcode** consists of two components:

- 1 A password, *plus*
- 2 The random 6 digit number displayed on the token, which changes every minute.



### SecurID Token

**NOTE:** The bars next to the SecurID token indicate the time remaining before the currently displayed number is refreshed to reveal a new number. If there is only a single bar displayed, wait for the number to change and then enter the new number to create your password.

Web Administrators\* have the ability to manage user entitlements and tokens easily using the **Administration Console** within MUFG Exchange. Entitlements include:

- Assigning tokens
- Re-assigning tokens
- Enrolling for tokens for MUFG Exchange sign on
- Removing a tokens requirement for MUFG Exchange sign on
- Locking a user's token
- Unlocking a user's token
- Resetting a user's token
- Ordering tokens

*\*These features are only available to Web Administrators who are currently using tokens in MUFG Exchange.*

## Token Management

The Token Management page provides a consolidated status of user entitlements for tokens as well as detailed log information. To access Token Management\*:

- 1 Sign On to MUFG Exchange.
- 2 Go to the **Administration Console**.
- 3 Select **Security Tokens** from the drop-down menu.

\* This will only be shown if you are a Web Administrator currently using a token in MUFG Exchange

### Administration Console

User Two, SAMPLE COMPANY A For more information, please refer to User Help

---

**Manage Entitlements**  
Click on services below to view all the Users.  
Click "Edit" to modify that User's entitlements.

→ Create a New User

Maintain Security Tokens **1**

Security Tokens

User Security

[View Change Request Status](#)

---

**Manage Users**  
Click on a User to edit their profile

Change requests require two users: One to create the request and one to approve it. [User Guide](#)

Active	Users		<a href="#">Payments and Reporting</a>	<a href="#">Check Manager</a>				
	Last, FirstName	User ID						
<input checked="" type="checkbox"/>	burlison, j	jilltest	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	del muro, c	cdelmur020	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	eighteen, a	adminnameeight...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	eleven, a	adminnameeleve...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	fifteen, a	adminnamefifte...	<input checked="" type="checkbox"/> Edit	Enroll				
<input type="checkbox"/>	fourteen, a	adminnamefour...	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	mcnab, a	amymcnab	Enroll	Enroll				
<input checked="" type="checkbox"/>	name, u	username1	<input checked="" type="checkbox"/> Edit	Enroll				

Scroll right to view other services

Refresh

The Token Management page lists your organization's users and provides the following statistics for each token:

- 1 Token Expiration
- 2 Token serial number
- 3 User Name
- 4 User ID
- 5 User Type
- 6 Token Status
- 7 Use Token at Login

**Note:** When a user activates a new token to replace an existing expiring token, the new token will be displayed in Token Management the next day.

### Token Management

Results per page 10 9 items found, displaying all items. 1

Token Expir. <b>1</b>	Token Serial <b>2</b>	User Name <b>3</b>	User ID <b>4</b>	User Type <b>5</b>	Token Status <b>6</b>	Use Token at Login <b>7</b>
657 Days	111111111111	<a href="#">User_Sample</a>	<a href="#">sampleadmin</a>	WEB	Active	Yes
657 Days	222222222222	<a href="#">User_Sample</a>	<a href="#">sampleuser</a>	WEB	New	Yes
Expired	333333333333	<a href="#">User_Sample</a>	<a href="#">sampleuser1</a>	WEB	Not Registered	N/A
Expired	444444444444	<a href="#">User_Sample</a>	<a href="#">sampleuser4</a>	EMP	Locked	N/A

You have ordered **0** additional token(s).

**NOTE :** Please replace expiring tokens 30 days before they expire. If you have a token that is not on the list above, or if you have any questions, please call Customer Service at: 1-844-544-0387, option 2, from 8am-7pm ET.

You can also use the Token Management page for convenient access to:

- **User Profile** by clicking either the user name or user ID.
- **Administration Console** with the command button at the bottom of the page.
- **Token Transaction Log** with the command button at the bottom of the page.
- **Request Additional Tokens** with the command button at the bottom of the page.

MUFG Exchange

4 12 1

Good Morning Dan SIGN OFF

Home
Payments & Transfers
Receivables
Reports
Privacy Policy
?
Users
Search

### Token Management

Results per page 10 35 items found, displaying 1 to 10. [First/Prev] 1, 2, 3, 4 [Next/Last]

Token Expir.	Token Serial #	User Name	User ID	User Type	Token Type	Token Status	Use Token at Login
122 Days	000157870926	Winson, Beth	113428Zbwinson	WEB	Physical	New	Yes
123 Days	000157931394	N/A	N/A		Physical	Not Registered	N/A
152 Days	000400155063	Pathak, Ranjana	113428Zranjana	WEB	Physical	Active	Yes
152 Days	000400170539	Pathak, Ranjana	muforanjantest	WEB	Physical	Active	Yes
152 Days	000400154569	N/A	N/A		Physical	Not Registered	N/A
517 Days	000405702659	DeLuca, Daniel	mufodantest	WEB	Physical	Active	Yes
882 Days	000411849202	Collins, Beth Ann	113428Zbberna	WEB	Physical	Active	Yes
882 Days	000411841780	DeLuca, Dan	113428Zdeluc	WEB	Physical	Active	Yes
882 Days	000411829971	N/A	N/A		Physical	Not Registered	N/A
883 Days	000411840690	DeLacruz, Gracia	gracedelacruz	WEB	Physical	Active	Yes

You have ordered **12** additional token(s).

**NOTE :** Please replace expiring tokens 30 days before they expire. If you have a token that is not on the list above, or if you have any questions, please call Customer Service at: 1-844-544-0387, option 2, from 8am-7pm ET.

Admin Console | Token Transaction Log | Request Additional Tokens | Reset

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[Privacy Policy](#)
[Secure Site](#)

## Token Transaction Log

The **Token Transaction Log** provides all token maintenance actions taken in the past 90 days.

- 1 This activity is tracked by user.
- 2 Use the Token Transaction Log to understand the status of your organization's tokens.
- 3 To view activity for a specified time period, simply changing the dates in the search criteria..

### Token Transaction Log

From:  To:   Include Token Logins

Results per page  3 items found, displaying all items. 1

Date	Token Serial #	User Name	User ID	Action	Performed By	Change Request #
08/27/2018	111111111111	User_Sample	sampleadmin	Assign Token and Enable for Login	sampleadmin	
08/27/2018	222222222222	User_Sample	sampleuser	Unassign Token	sampleadmin	
08/02/2018	333333333333	User_Sample	sampleuser1	Assign Token and Enable for Login	sampleadmin	
08/27/2018	444444444444	User_Sample	sampleuser4	Unassign Token	sampleadmin	

## Request Additional Security Tokens

Order additional tokens for your organization quickly and easily from the **Request Additional Security Tokens** page:

- 1 Complete the form.
- 2 Click **Submit** and MUFG will process and fulfill your request.

### Request Additional Security Tokens

Please enter information for all required fields to request additional tokens.

\*= Required Field

\*Token Quantity:  (10 Tokens Maximum)

\*First Name:

\*Last Name:

\*Company Name: SAMPLE COMPANY

\*Telephone Number:  Ext.  [123-456-7890]

\*Address Line1:

Address Line2:

\*City:

\*State:

\*Country:

Postal Code:

Please select the reason for your token request. If your tokens are expired, lost or defective, provide the serial numbers and ensure that they are unassigned in the Financial Center.

Request for New Tokens

Replace Token(s) that are Lost or Expired

Replace Token(s) that are Defective



## Assigning Security Tokens

To assign a security token to a user:

- 1 Sign On to MUFG Exchange.
- 2 Go to the **Administration Console**.
- 3 Select user profile from the **Manage Users** section.

The screenshot shows the Administration Console interface. At the top, it says "User Two, SAMPLE COMPANY A". Below that, there are sections for "Manage Entitlements" and "Manage Users". The "Manage Users" section is highlighted with a circled '3'. It contains a table of users with columns for "Active", "Last, FirstName", "User ID", "Permissions and Reporting", and "Check Manager". The table lists several users, including "burleson\_j", "del\_murp\_o", "stolten\_a", "stevon\_a", "filteen\_a", "fourteen\_a", "mcnab\_a", and "name\_u". A "Refresh" button is located at the bottom right of the table.

- 4 Click on **Assign Security Token**.

The screenshot shows the "Edit User Profile" page for "Web Administrator, SAMPLE COMPANY". The page displays user information such as "User ID: sampleuserid", "Last Valid Login", "Last Contact Info Review", "First Name: Sample", "Middle Name", "Last Name: User", "Email Address: sXXXXe@email.com", "Send High Risk Transactions email: Yes", "Notify user by email about offers, promotions, and new products: No", and "User Type: Web Admin". On the right side, there is a "Security Maintenance" section with a "Challenge Questions Status: Inactive" and a "Last Challenge Questions Change:" section. A circled '4' points to the "Assign Security Token" button in this section. Other buttons include "Manage User Phones", "Lock User Access", and "Permanently Delete User". A note at the bottom states: "Note: Once a User is permanently deleted, their entitlements cannot be copied to another User." An "Admin Console" link is at the bottom right.

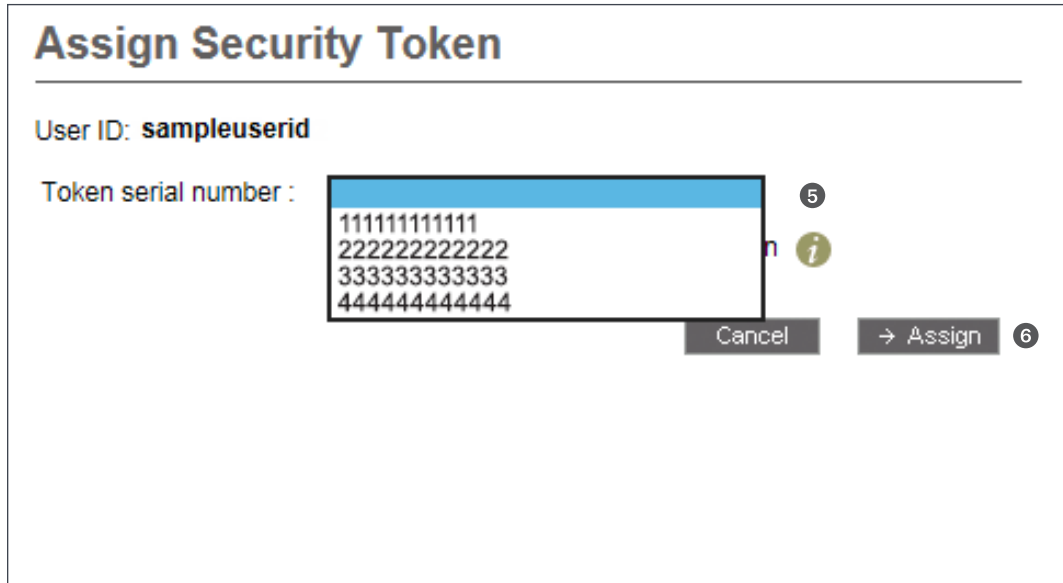
- 5 The **Assign Security Token** screen will pop up.
- 6 Add the assigned token's serial number.
- 7 Click **Assigned**.

The screenshot shows the "Assign Security Token" dialog box. It displays "User ID: sampleuserid" and a "Token serial number" field with a dropdown arrow, highlighted with a circled '5'. Below the field is a checked checkbox labeled "Use Token for Login Authentication" with an information icon. At the bottom, there are "Cancel" and "Assign" buttons, with the "Assign" button highlighted by a circled '6'. A circled '7' is located at the bottom right of the dialog box.

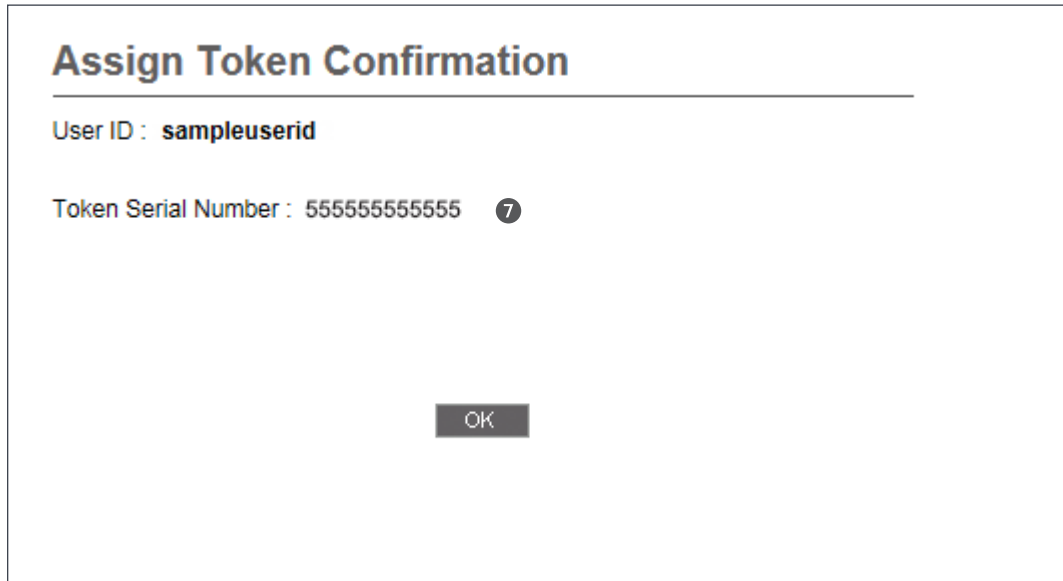
- 5 Select a token serial number from the drop down menu in the pop-up window

The list of token serial numbers is based on the number of tokens that the Bank has sent to your company that have not been assigned to any users. If there are no token serial numbers in the drop down, contact MUFG Bank to order additional tokens.

- 6 Click **Assign** and a confirmation message will display.



- 7 The user is now assigned a token.



## Editing Security Token Entitlements

To edit security token entitlements:

- 1 **Sign On** to MUFG Exchange.
- 2 Go to the **Administration Console**.
- 3 Select user profile from the **Manage User** section.

**Administration Console** 2

User Two, SAMPLE COMPANY A For more information, please refer to User Help

**Manage Entitlements**  
Click on services below to view all the Users.  
Click "Edit" to modify that User's entitlements.

Manage Users 3  
Click on a User to edit their profile

View Change Request Status  
Change requests require two users - One to create the request and one to approve it. [User Guide](#)

Active	Last, FirstName	User ID	Permissions and Reporting	Check Manager
<input checked="" type="checkbox"/>	burleson, j	jburles	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	del muro, c	cdelmur020	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	eighteen, a	adminnameeight...	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	eleven, a	adminnameeleve...	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	fifteen, a	adminnamefife...	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	fourteen, a	adminnamefour...	<input checked="" type="checkbox"/> Edit	Enroll
<input checked="" type="checkbox"/>	mcnab, a	amymcnab	Enroll	Enroll
<input checked="" type="checkbox"/>	name, u	username1	<input checked="" type="checkbox"/> Edit	Enroll

Scroll right to view other services

Refresh

- 4 Select **Edit User Profile**.
- 5 Click **Edit Security Token** and the **Security Token Settings** screen will pop up.

FINANCIAL CENTER MY PRODUCTS AND SERVICES > ACTION ITEMS (64) ALERTS (10) MESSAGE CENTER (5) Administration Console | Contact Us | Sign off

**Edit User Profile**

Contracting Officer / Web Administrator, MUFG UNION BANK ADMIN CONSOLE DEMO

**4** Edit User Profile

User ID: **sampleuser**  
Last Valid Login:  
Last Contact Info Review:  
First Name: Sample  
Middle Name:  
Last Name: User  
Email Address: sXXXXe@email.com  
Send High Risk Transactions email: Yes  
Notify user by email about offers, promotions, and new products: Yes  
User Type: Web Admin

**Security Maintenance**

Challenge Questions Status: Inactive  
Last Challenge Questions Change:  
Manage User Phones  
Lock User Access  
Edit Security Token  
Permanently Delete User

**5** Note: Once a User is permanently deleted, their entitlements cannot be copied to another User.

Admin Console

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6 Select the entitlements to edit:

- Unassign Token
- Reset Token
- Lock Token

7 Click **Update** and a confirmation message will display.

### Security Token Settings

---

User ID : **sampleuserid**

Token Serial Number : 000405702326     Use Token for Login Authentication

Token Status : Active

**Token Options**

Unassign Token *i*

Reset Token *i* 6

Lock Token *i*

   7

8 A confirmation screen will appear.

### Security Token Settings Updated 8

---

User ID: **sampleuserid**

Token serial number: 666666666666

Token status: New

## Deleting User with Token Entitlements

Your users that have a token assigned can easily be identified by looking for the **token icon** in front of the user's name on the Administration Console.

### Administration Console

Web Administrator, SAMPLE COMPANY

From this page you may create new Users, edit User entitlements, and enroll or remove Users from services. **(Please turn off any pop-up blocker when accessing the Administration Console.)**  
For more instructions on using the Administration Console, view or print the [User Guide](#)

→ Create a New User    Maintain Security    [View Change Request Status](#)

Manage Users		Manage Services							
Click on a User to edit their profile		Click on a service to view all the Users Click 'Edit' to modify that User's entitlements		Change requests require two users. One to create the request and one to approve it. <a href="#">User Guide</a>					
Users		Total Biller Solution	Check Manager						
Active	Last, FirstName	User ID							
	user_s	sampleuserid	<input checked="" type="checkbox"/> Edit	Edit					
	user_s	sampleuserid3	Enroll	Enroll					
<input checked="" type="checkbox"/>	user_s	sampleuserid5	Submitted	<input checked="" type="checkbox"/> Edit					
<input checked="" type="checkbox"/>	user_s	sampleuserid7	Enroll	<input checked="" type="checkbox"/> Edit					
	user_s	sampleuserid6	Enroll	Enroll					
<input checked="" type="checkbox"/>	user_s	sampleuserid4	<input checked="" type="checkbox"/> Edit	Submitted					
	user_s	sampleuserid2	<input checked="" type="checkbox"/> Edit	Enroll					
<input checked="" type="checkbox"/>	user_s	sampleuserid1	<input checked="" type="checkbox"/> Edit	Enroll					

If you need to delete a user with a security token from MUFG Exchange, the token must first be removed or unassigned. This requires a two-step process in order to ensure that the token can be reassigned, and your token inventory is correct.

### Step 1: Un-assign security token from a user

- 1 Sign on to MUFG Exchange.
- 2 Go to the **Administration Console**.
- 3 Select user profile from the **Manage User** section.
- 4 Click **Edit Security Token**.
- 5 Select **Un-assign token**.
- 6 Click **Update** and a confirmation message will display.

### Step 2: Delete User Profile

- 1 Go to the **Administration Console**.
- 2 Click on the user name to be deleted.
- 3 On the **Edit User Profile** page, click on **Permanently Delete User**.

## **MUFG Exchange IP Address Restriction Overview**

MUFG Exchange can be configured or restricted to accept 'sign-ins' from your users only if they originate from an IP address that is on an approved list of addresses. This feature is called IP Address Restriction.

If your company utilizes known IP addresses to access the Internet, then IP Address Restriction can be utilized as an additional security feature that will prevent any user from signing into MUFG Exchange from any IP address other than your own.

This guide contains easy to follow instructions, and also informs you on how to exempt specific users from this restriction (due to traveling and other needs).

## IP Address Restriction

To access the IP Address Restriction Page:

- 1 Sign on to MUFG Exchange.
- 2 Click on the **Administration Console**.

The screenshot shows the MUFG Exchange Administration Console. The top navigation bar includes 'Home', 'Payments & Transfers', 'Reports', 'Privacy Policy', and 'Sign Off'. A dropdown menu is open under the 'Administration' icon, listing the following options: Administration Console, User Maintenance, Alert Center, Contact Center, Import, Preferences, and Audit Information. The 'Administration Console' option is highlighted with a red circle and the number '2'.

- 3 Click **Maintain Security** from the drop down box.
- 4 Select **Manage IP Address Restrictions**.

The screenshot shows the 'Administration Console' 'Manage Users' page. At the top, it says 'Web Administrator, SAMPLE COMPANY'. Below this is a message: 'From this page you may create new Users, edit User entitlements, and enroll or remove Users from services. (Please turn off any pop-up blocker when accessing the Administration Console.) For more instructions on using the Administration Console, view or print the [User Guide](#)'.

There are two main sections: 'Manage Users' and 'Services'. The 'Manage Users' section has a sub-menu with 'Maintain Security', 'Security Tokens', 'User Security Settings', and 'Manage IP Address Restrictions' (highlighted with a blue box). Below this is a table of users:

Active	Last, FirstName	User ID	Total Biller Solution	Check Manager				
<input type="checkbox"/>	user_s	sampleuserid	<input checked="" type="checkbox"/> Edit	Edit				
<input type="checkbox"/>	user_s 3	sampleuserid3	Enroll	Enroll				
<input checked="" type="checkbox"/>	user_s	sampleuserid5	Submitted	<input checked="" type="checkbox"/> Edit				
<input checked="" type="checkbox"/>	user_s 4	sampleuserid7	Enroll	<input checked="" type="checkbox"/> Edit				
<input type="checkbox"/>	user_s	sampleuserid6	Enroll	Enroll				
<input checked="" type="checkbox"/>	user_s	sampleuserid4	<input checked="" type="checkbox"/> Edit	Submitted				
<input type="checkbox"/>	user_s	sampleuserid2	<input checked="" type="checkbox"/> Edit	Enroll				
<input checked="" type="checkbox"/>	user_s	sampleuserid1	<input checked="" type="checkbox"/> Edit	Enroll				

At the bottom right of the table, it says 'Scroll right to view other services' and there is a 'Refresh' button.

The Company IP Address Restriction page controls the use of this feature and allows you to enter and update your list of IP addresses.

This page allows you to;

- 1 Turn IP Address Restriction On
- 2 Turn IP Address Restriction Off
- 3 Add, change, or delete individual IP addresses

If you turn off IP address restriction, MUFG Exchange will automatically save your addresses, which can be activated by turning this feature back on.

**Note:** An asterisk can be used to indicate a range of numbers in the quartiles.

- 4 When you make changes on this page click **Submit**. If you have a token, you will be requested to enter your token passcode. Once this is validated you will receive a confirmation page of your changes which will be implemented immediately.

## Company IP Address Restriction

Web Administrator, SAMPLE COMPANY

As an additional security feature, your online users can be restricted to accessing the **Financial Center** from only the Internet Protocol (IP) addresses that your company uses to connect to the Internet.

Please select 'Turn On' to activate the IP Address security setting.

2  Turn **Off** IP Address Restriction i

1  Turn **On** IP Address Restriction

Then enter the permitted IP addresses below, and then click on 'Submit'. To remove an address, remove the checkmark beside the address. (To enter in a range of addresses, use an asterisk in the address, i.e. xxx.xxx.xxx.\*)

IP Address	3	Add/Remove
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Click [here](#) if you need to add more addresses.

The IP addresses entered will only be active if 'Turn On' is selected.

**Note:** This security feature is recommended only if you can provide a definitive list of externally-facing IP addresses. Users who access the Financial Center using several different workstations in your office, with a wireless device such as an "aircard" or from a hotel or offsite connection when travelling, will not be able to use this feature.

Such individual users can be exempted from using these IP addresses by accessing the user's profile from the Administration Console, and adding a check mark to the "Exempt this user from any IP address restrictions" feature.

4

[→ Admin Console](#) [→ Reset](#) [→ Submit](#)



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