# MUFG Exchange Administration Console

**USER GUIDE**

**EFFECTIVE NOVEMBER 2021**

**MUFG Bank, Ltd.**
A member of MUFG, a global financial group

MUFG

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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. |
| • Manage user accounts<br>• Create new users access and assign to services<br>• Manage security tokens | • Granted access to use specific online services with entitlements as defined by Web Administrators. |

### 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.

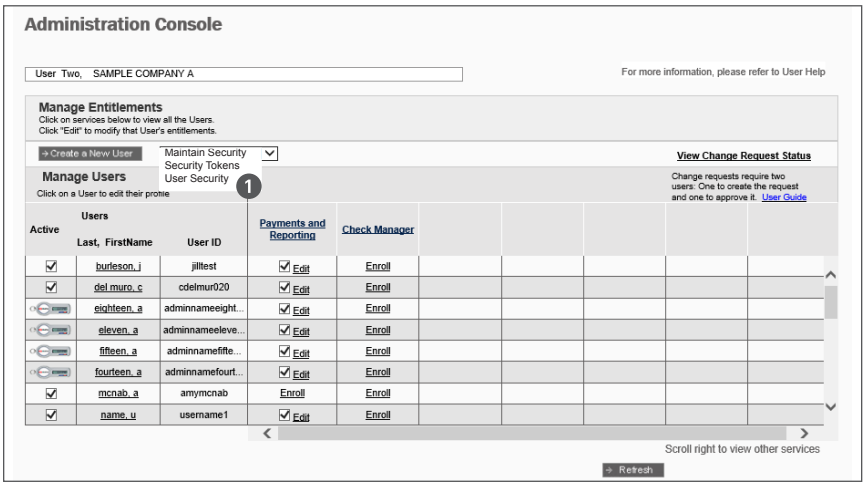
**FOR MORE INFORMATION**

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.

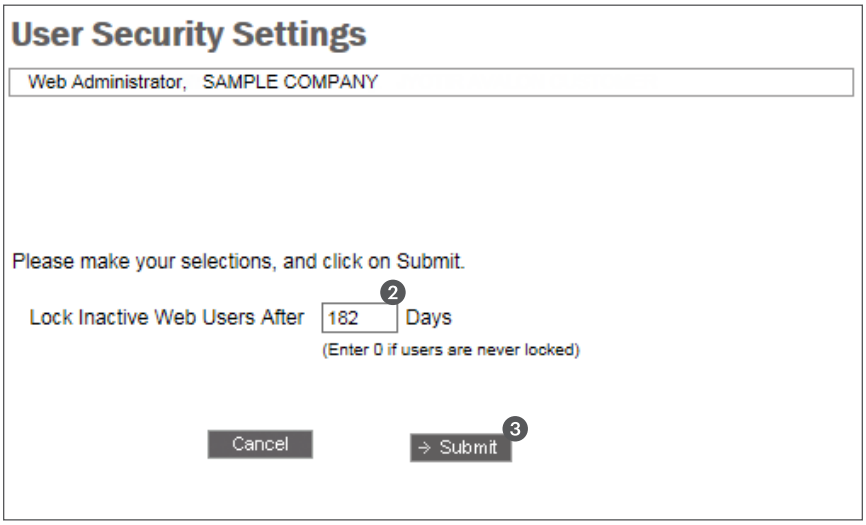
1. On the Administration Console, select **User Security Settings** from the Maintain Security drop-down.




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.



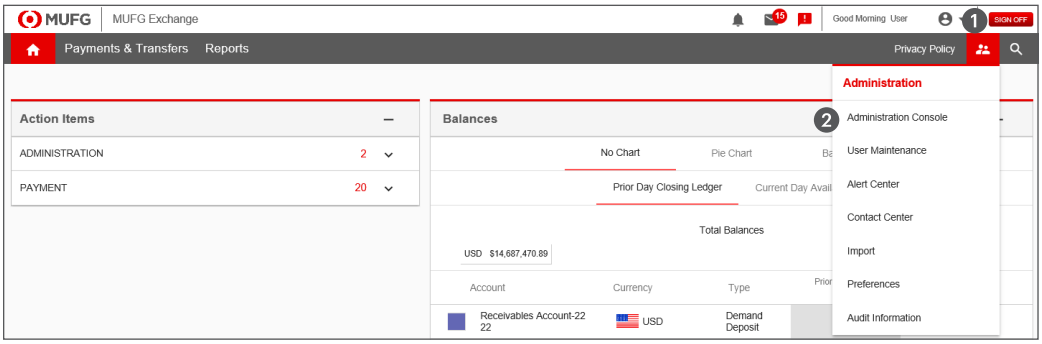
## Manage User Access

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

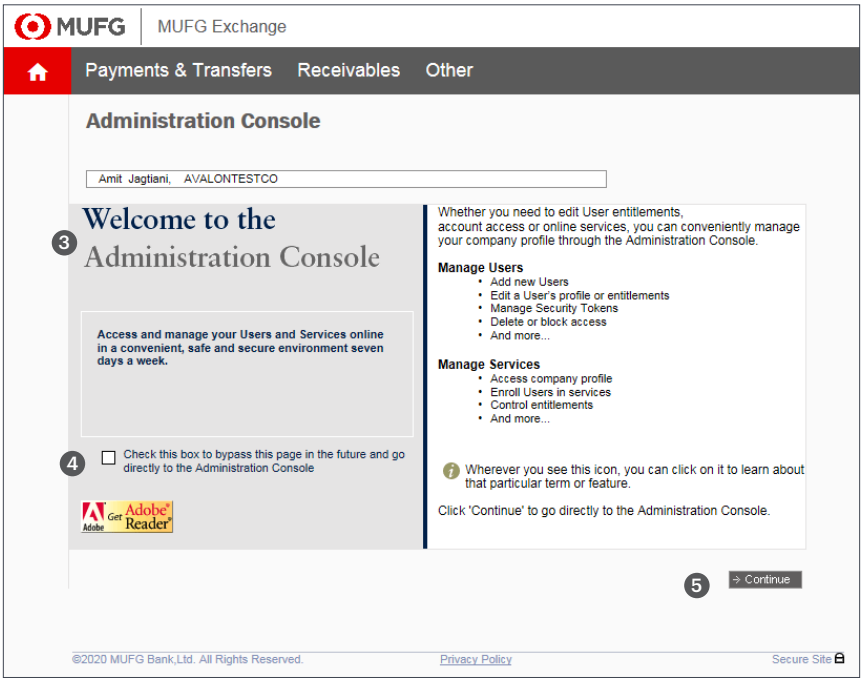
### Access the Administration Console

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.



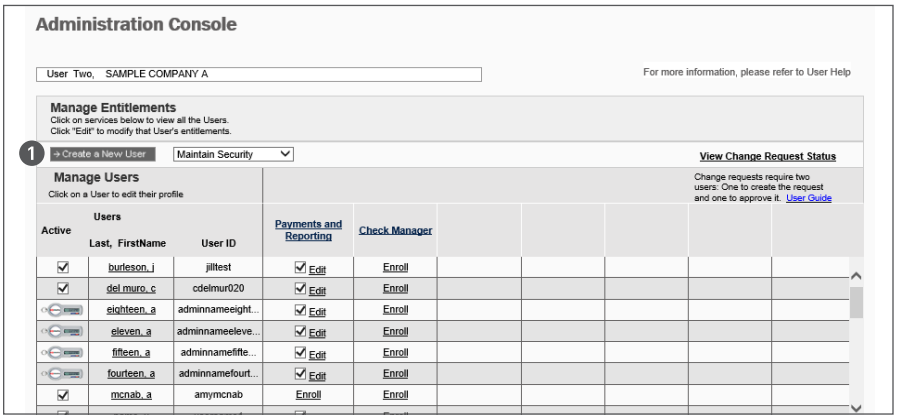

**To enhance security for your accounts, MUFG Exchange requires 1024-bit encryption.*

## Manage User Access

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

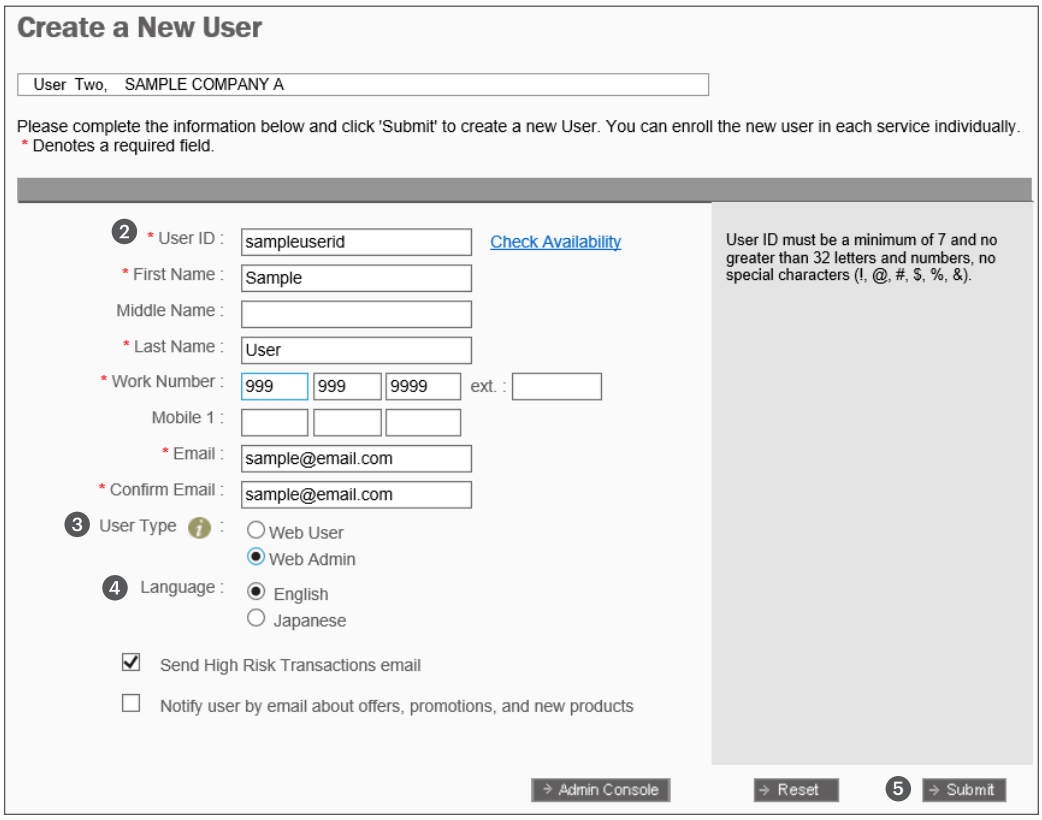
### Create a new user

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




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.

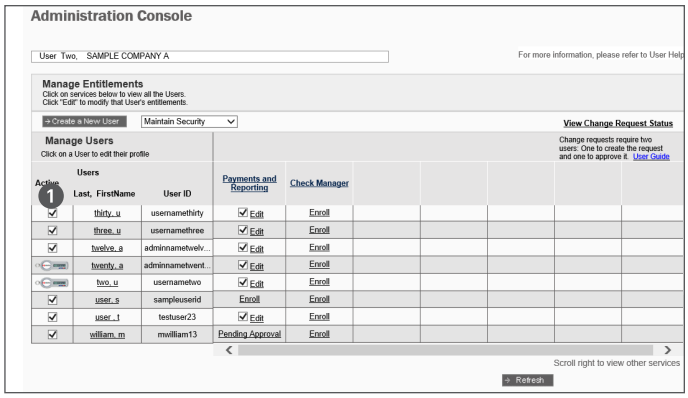


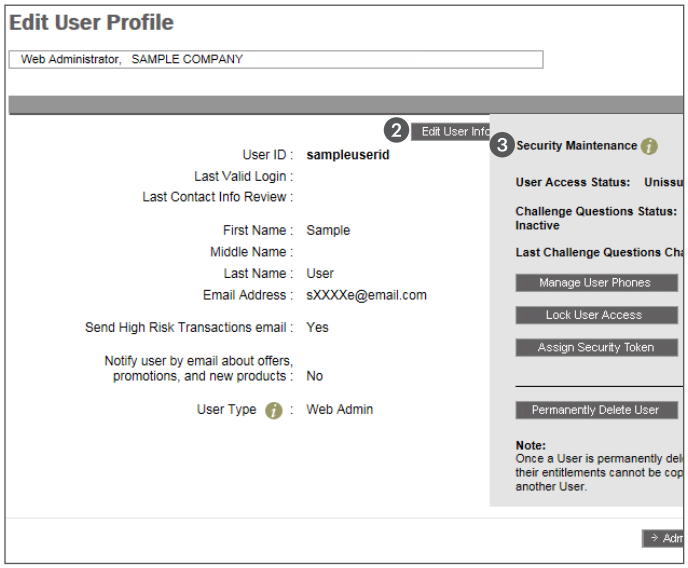
## Manage User Access

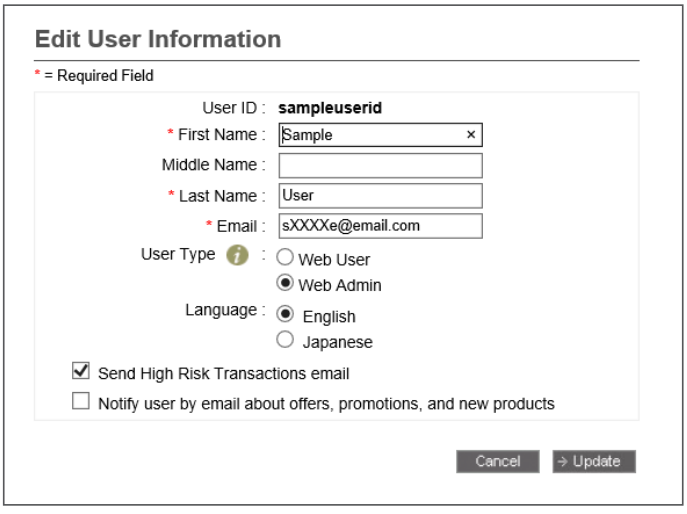
### Edit user profiles and reset tokens

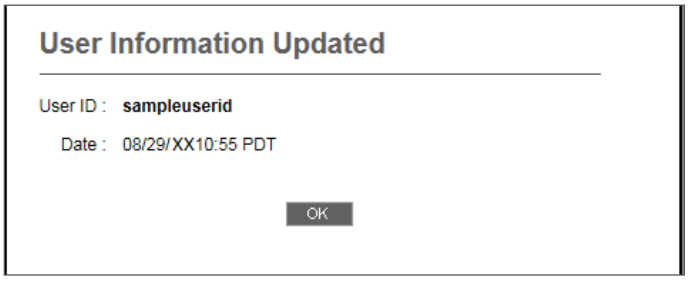
1. From the Manage Users section of the Administration Console, click the **Last, FirstName** of the user whose profile and/or token you want to change. This will bring you to the Edit User Profile page.
2. Click **Edit User Info**. Update the user's profile by entering new information where needed.
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.



## Manage User Access

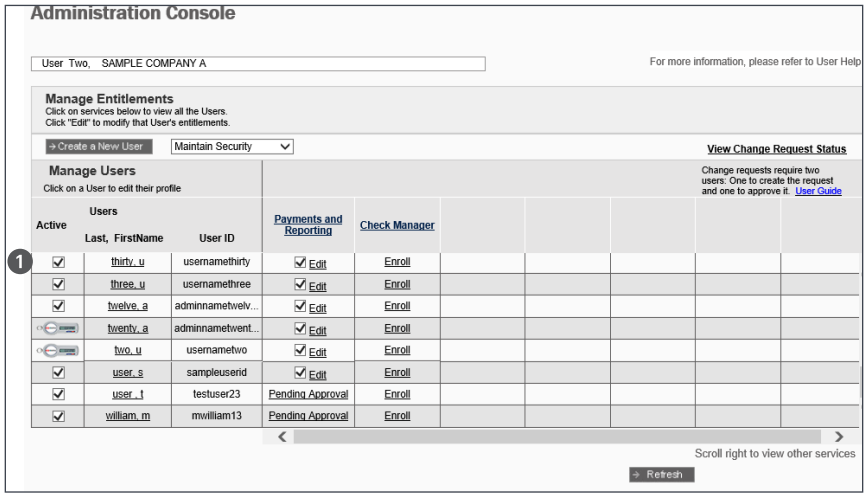
### Delete users permanently

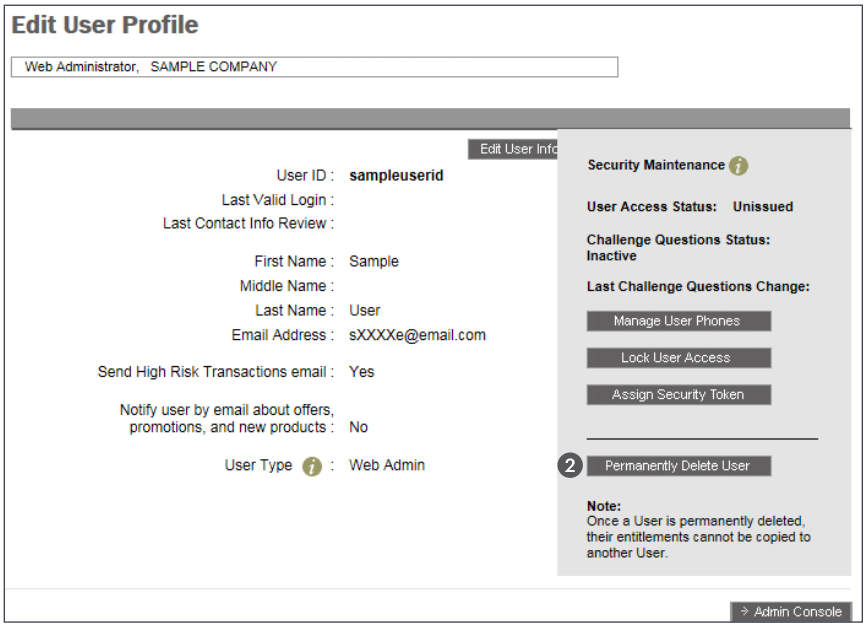
Deleting users permanently is appropriate if individuals leave the organization and you no longer need to use their profile to create new users.

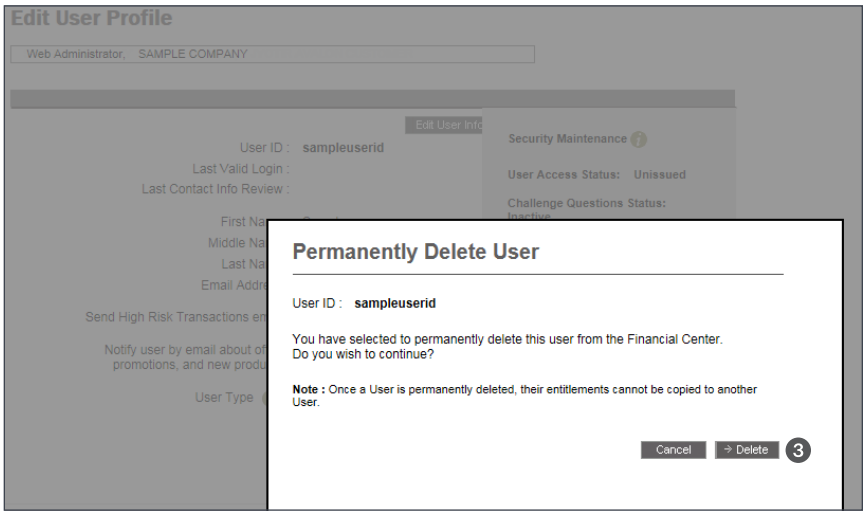
1. On the Administration Console, under the Manage Users section, click the name of the user you want to delete.
2. On the Edit User Profile page, in the Security Maintenance section, select **Permanently Delete User**.

   A prompt will appear, asking you to confirm this request.
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.



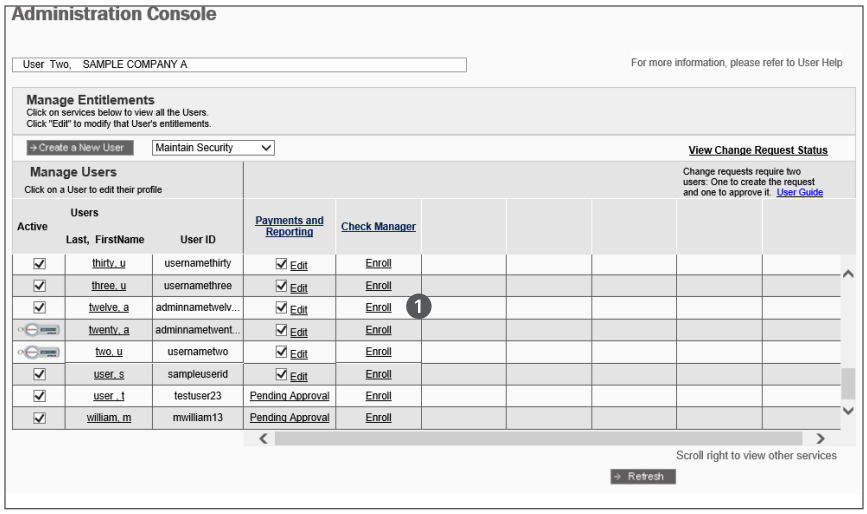



## Control User Access to Services and Accounts

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.

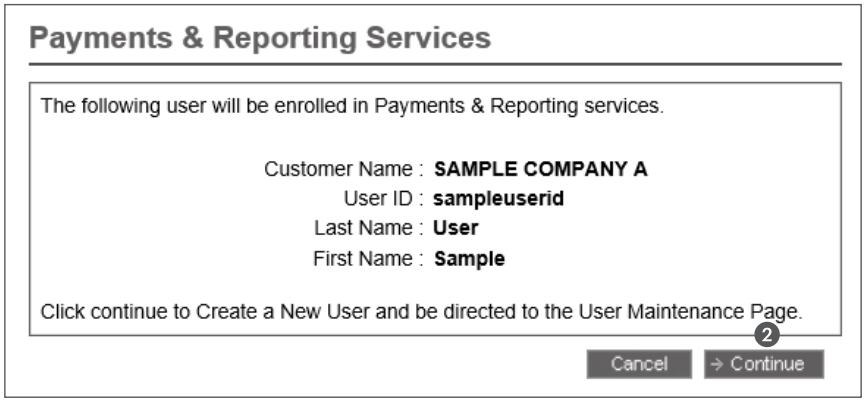
### Add a user to a service

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.




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

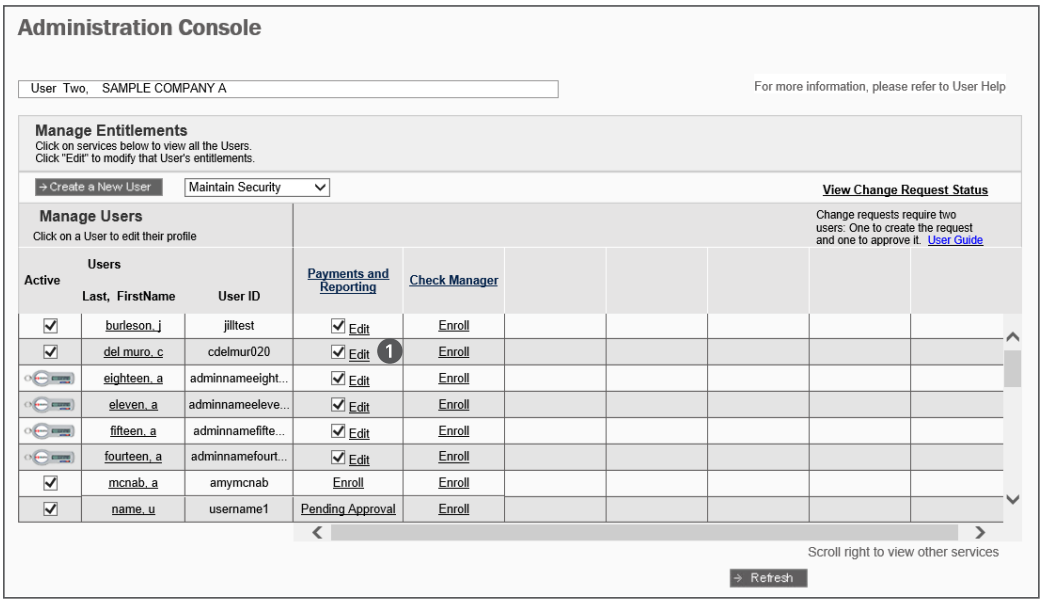
   **Note:** Repeat this process for each service you want to make available to the user.



## Control User Access to Services and Accounts

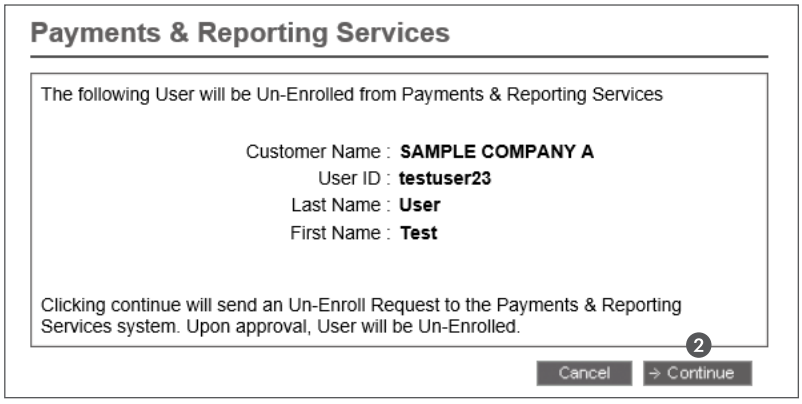
### Delete a user's access to a service

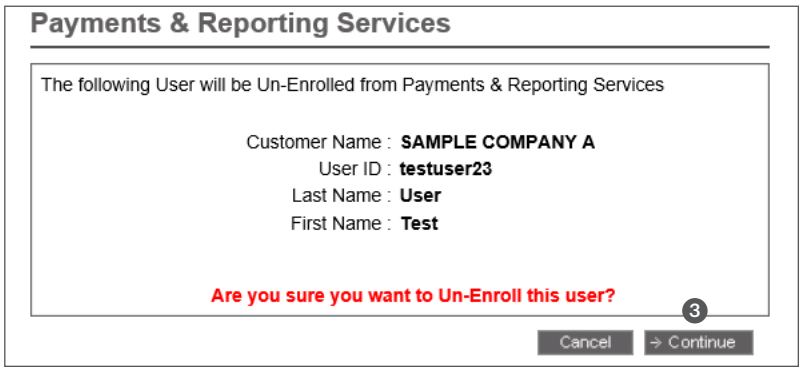
1. In the Manage Services section of the Administration Console, remove the check mark next to the service you wish to delete from the user.




2. Click Continue – The message "**Are you sure you want to Un-Enroll this user?**" will display.

3. Click **Continue** to confirm the request.



## Control User Access to Services and Accounts

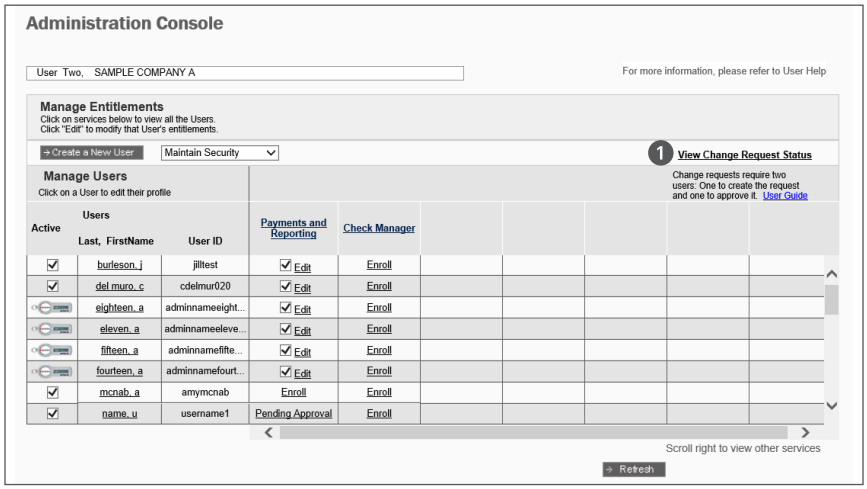
It's easy to view a 90-day history of all submitted service change requests.

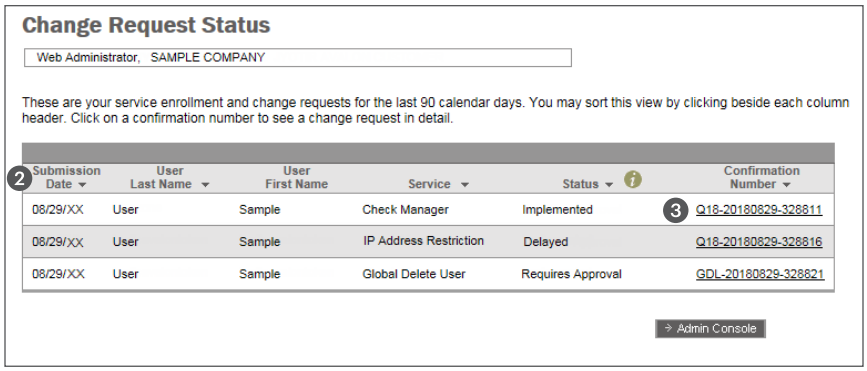
### View service change requests

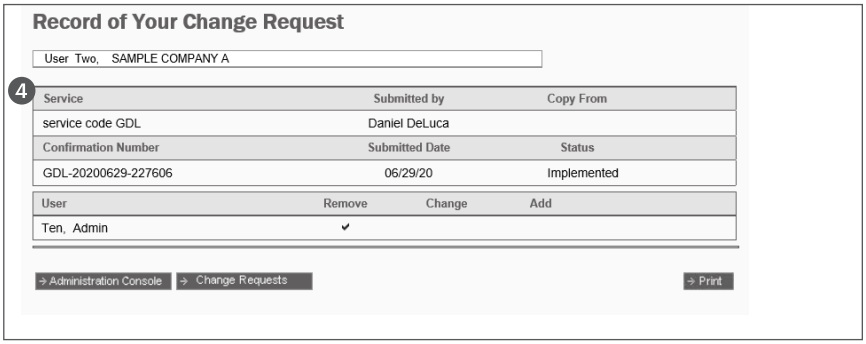
1. On the Administration Console, click **View Change Request Status**.
2. On the Change Request Status page, click the arrow next to the column header, Submission Date, User Last Name, Service, Status, or Confirmation Number to sort the view.
3. Click **Confirmation Number** to view the details for 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



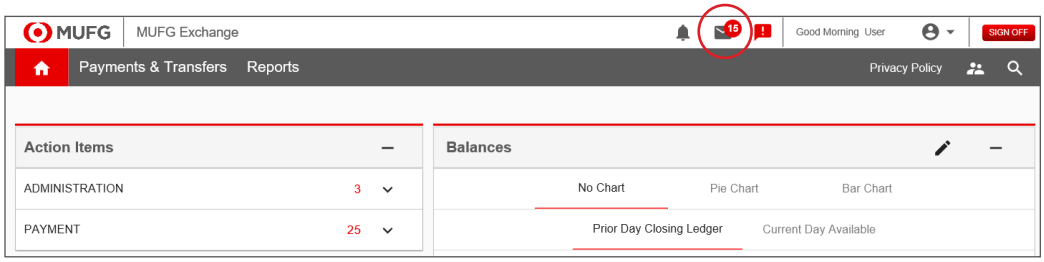
## Exchange Confidential Information

### 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.



## 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

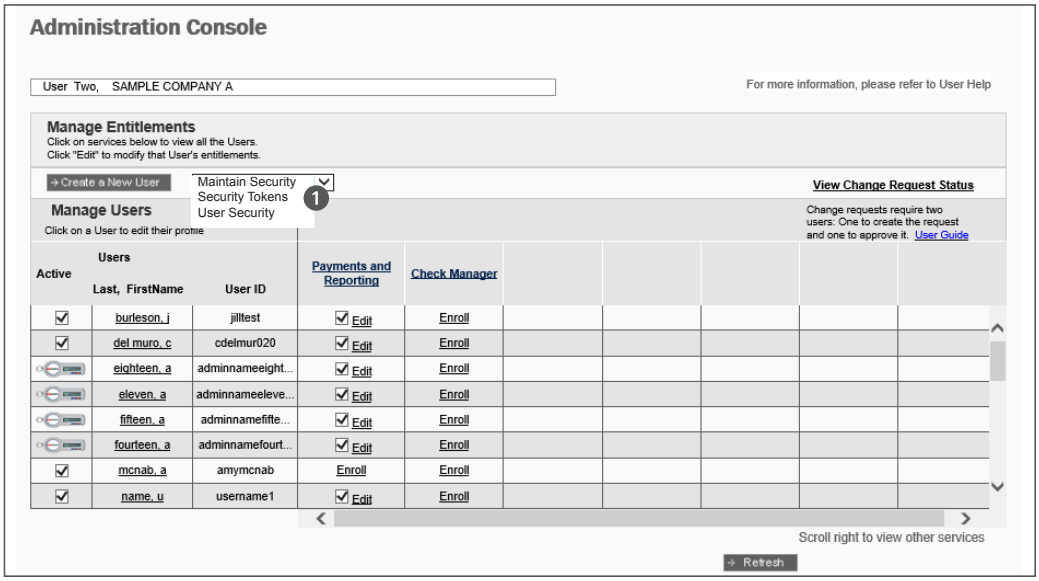
**These features are only available to Web Administrators who are currently using tokens in MUFG Exchange.*

## 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.

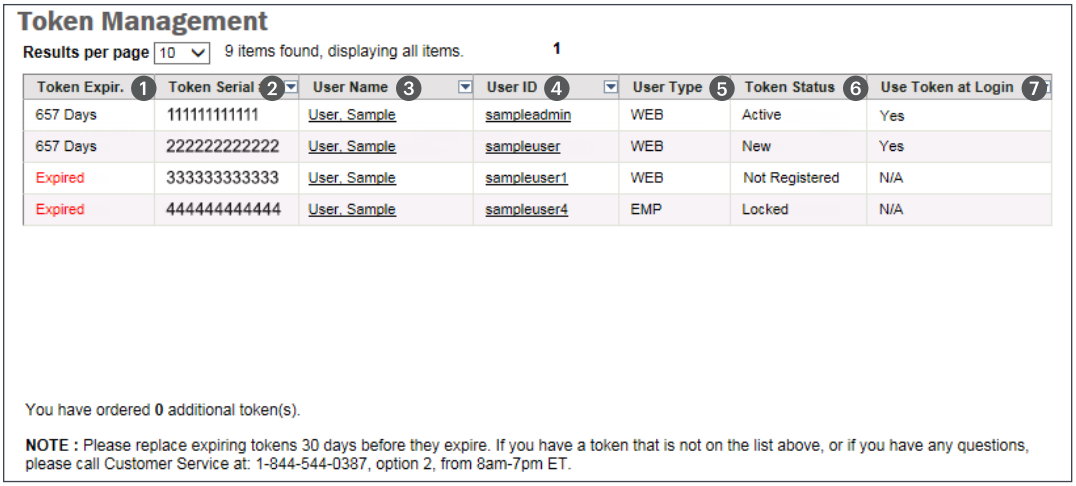
** This will only be shown if you are a Web Administrator currently using a token in MUFG Exchange*



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

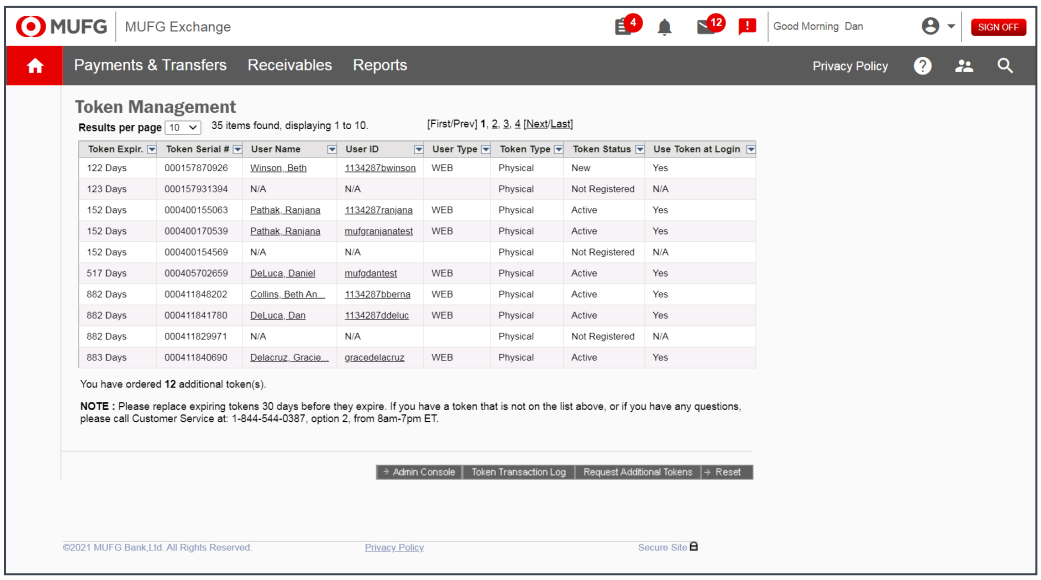
1. Token Expiration
2. Token serial number
3. User Name
4. User ID
5. User Type
6. Token Status
7. Use Token at Login

**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.




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

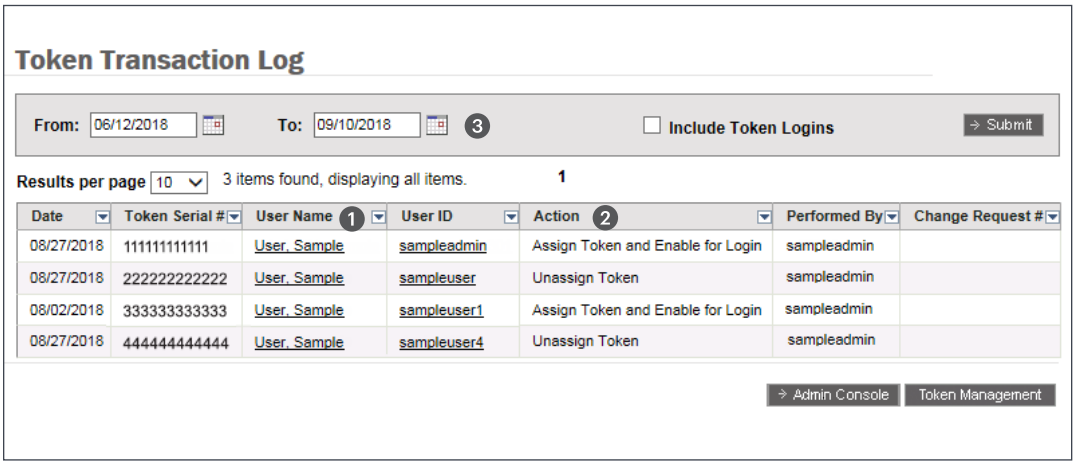
- **User Profile** by clicking either the user name or user ID.
- **Administration Console** with the command button at the bottom of the page.
- **Token Transaction Log** with the command button at the bottom of the page.
- **Request Additional Tokens** with the command button at the bottom of the page.



### Token Transaction Log

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

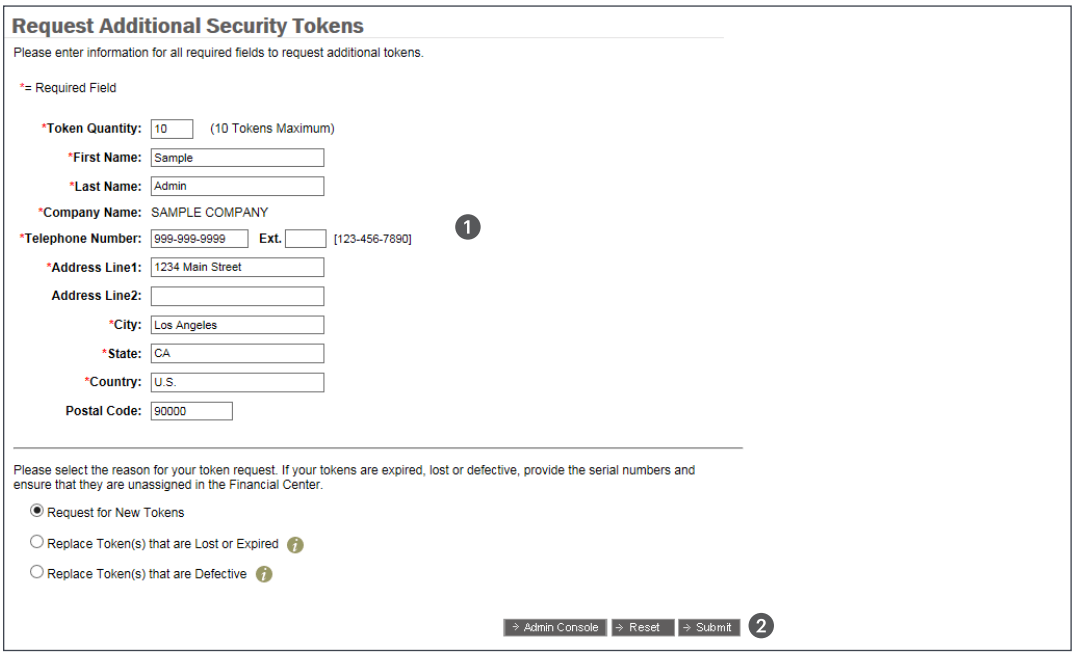
1. This activity is tracked by user.
2. Use the Token Transaction Log to understand the status of your organization's tokens.
3. To view activity for a specified time period, simply changing the dates in the search criteria..




### Request Additional Security Tokens

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

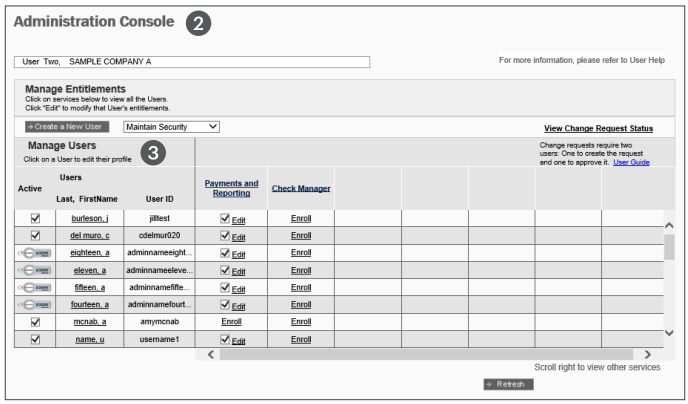
1. Complete the form.
2. Click **Submit** and MUFG will process and fulfill your request.



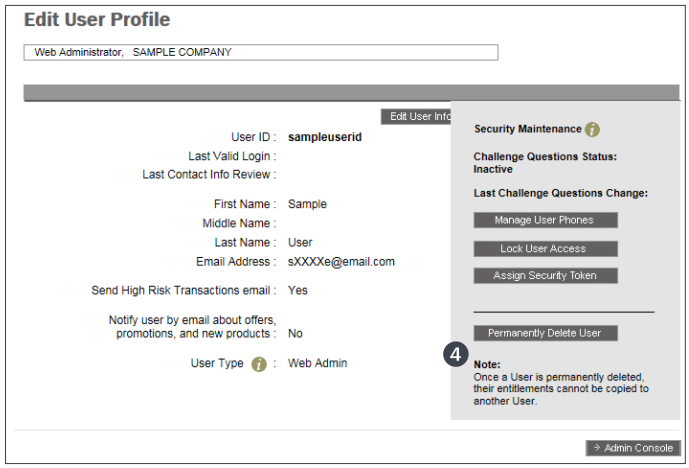
## Assigning Security Tokens

To assign a security token to a user:

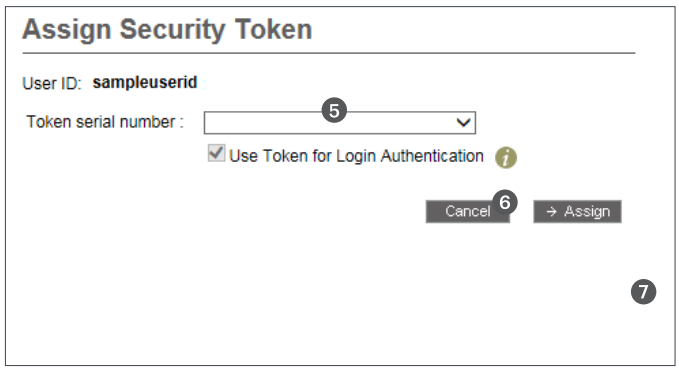
1. **Sign On** to MUFG Exchange.
2. Go to the **Administration Console**.
3. Select user profile from the **Manage Users** section.




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



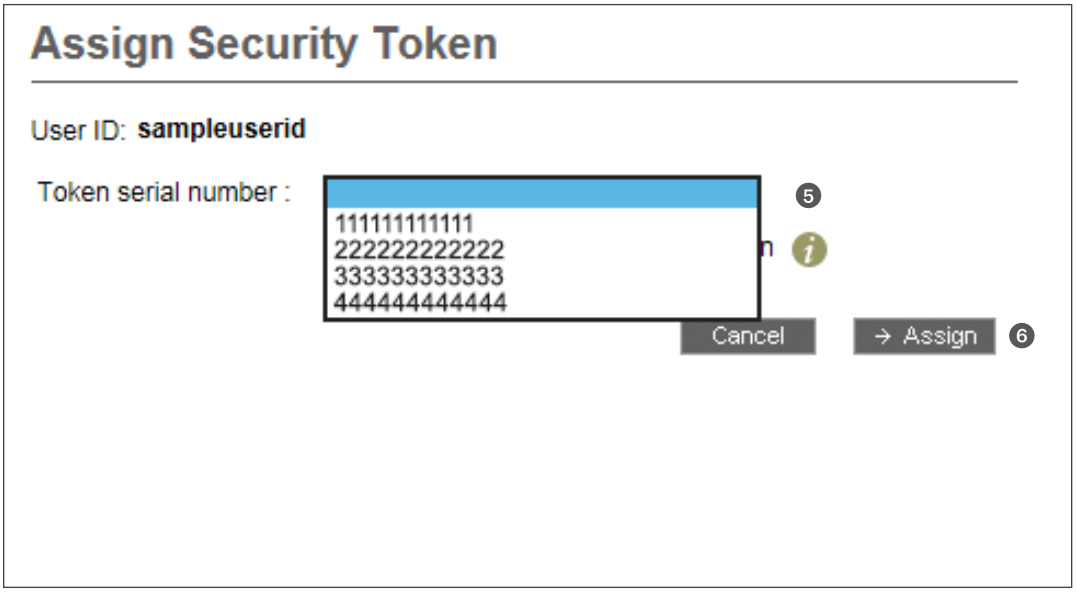

5. The **Assign Security Token** screen will pop up."
6. Add the assigned token's serial number.
7. Click **Assigned**.



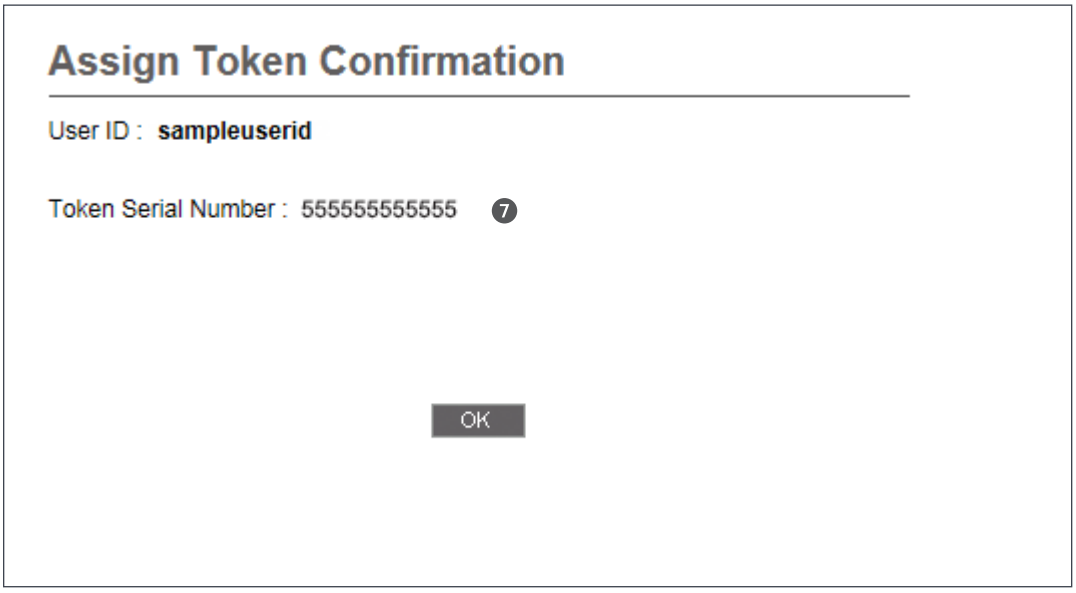
5 Select a token serial number from the drop down menu in the pop-up window

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.



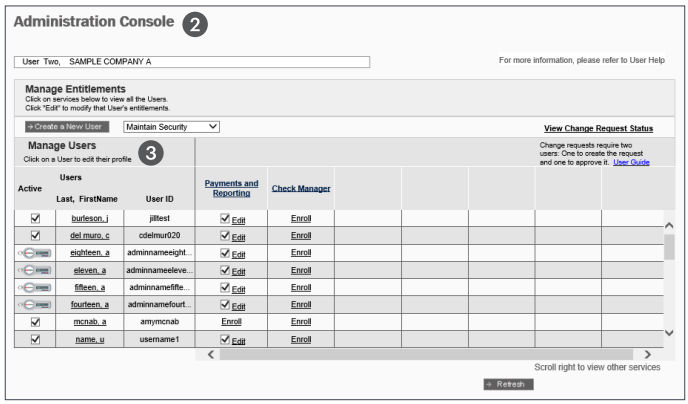

7 The user is now assigned a token.



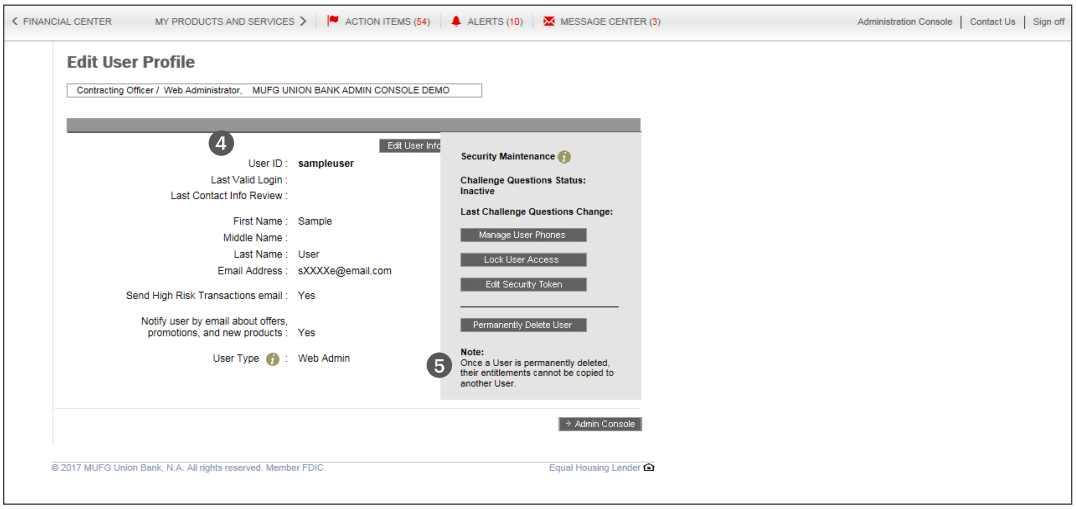
## Editing Security Token Entitlements

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.



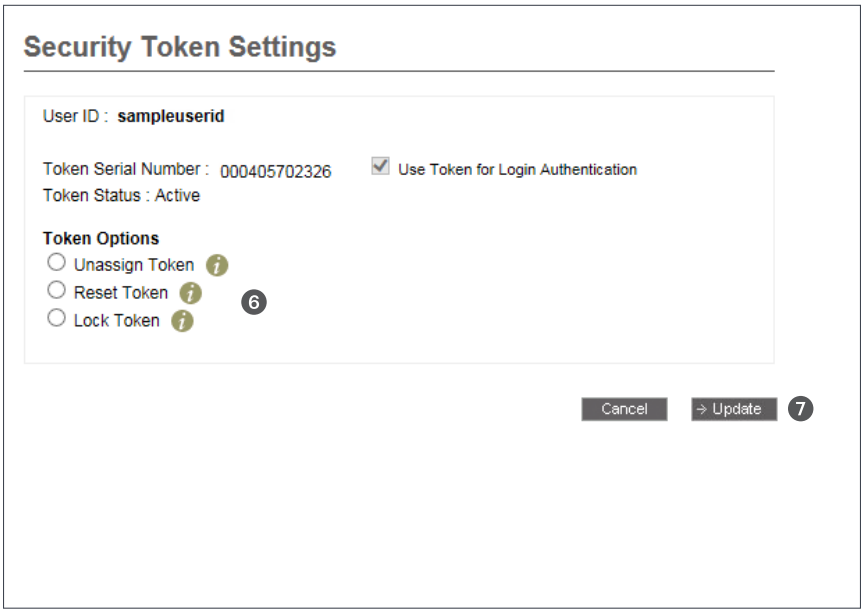

4. Select **Edit User Profile**.
5. Click **Edit Security Token**.and the **Security Token Settings** screen will pop up.



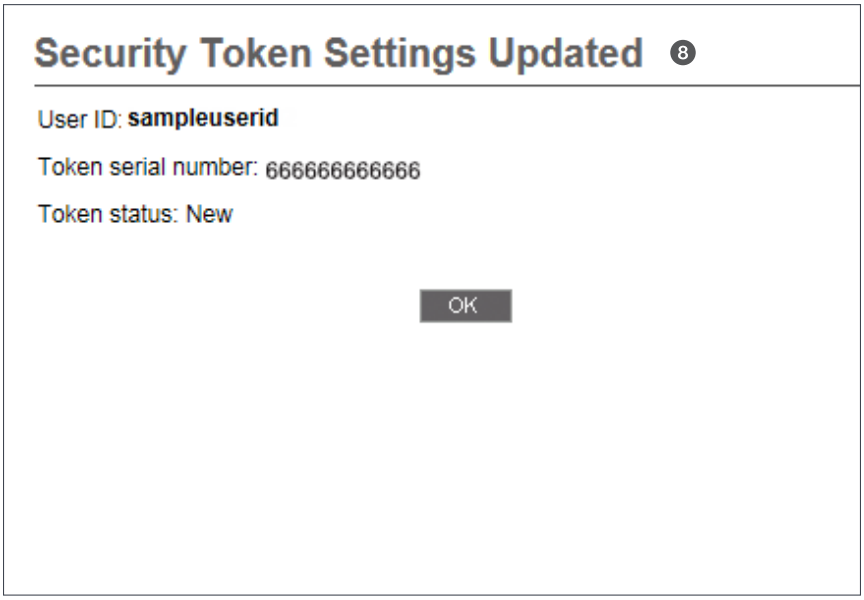
6 Select the entitlements to edit:

- Unassign Token
- Reset Token
- Lock Token

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

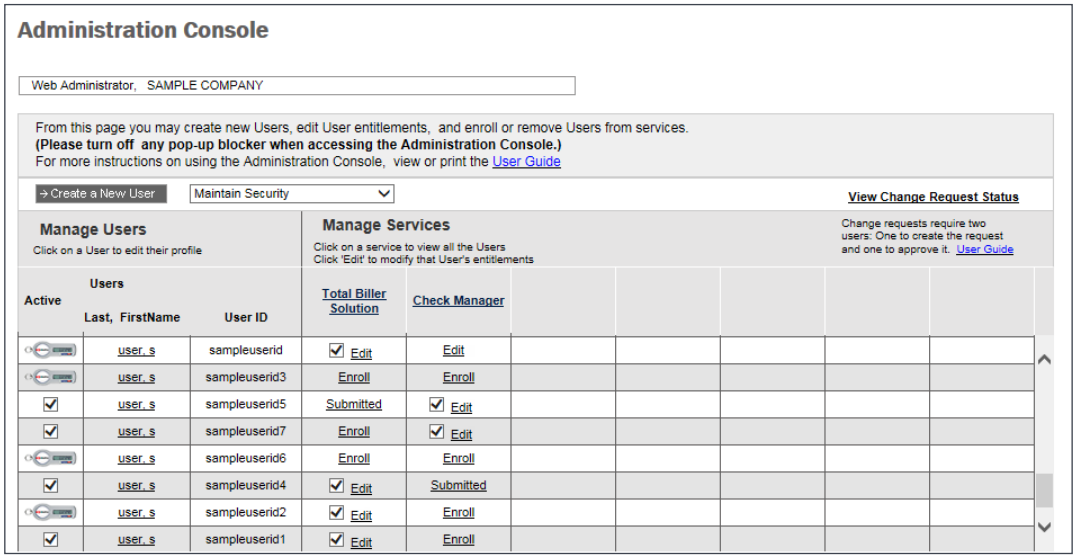



8 A confirmation screen will appear.



## 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.




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.

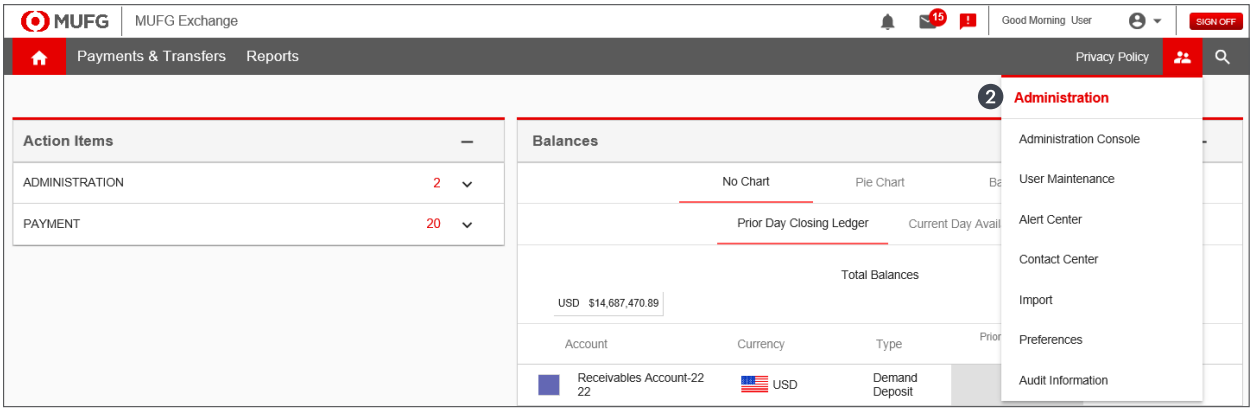
If your company utilizes known IP addresses to access the Internet, then IP Address Restriction can be utilized as an additional security feature that will prevent any user from signing into MUFG Exchange from any IP address other than your own.

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).

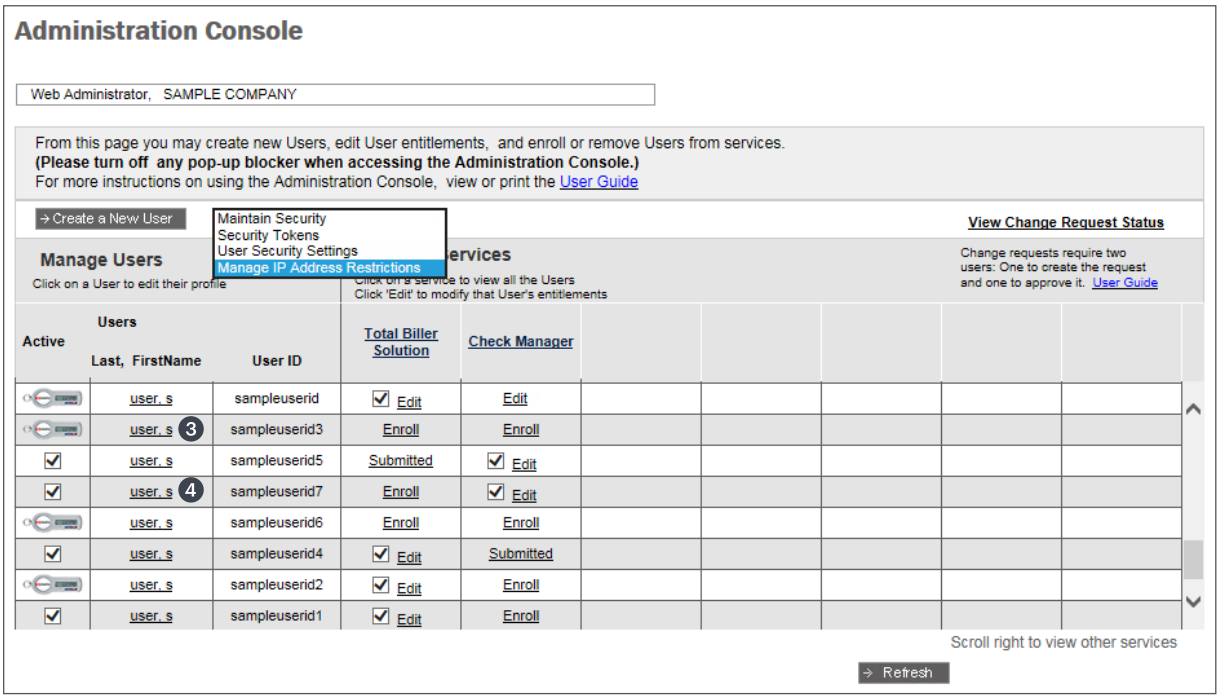
## IP Address Restriction

To access the IP Address Restriction Page:

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




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



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

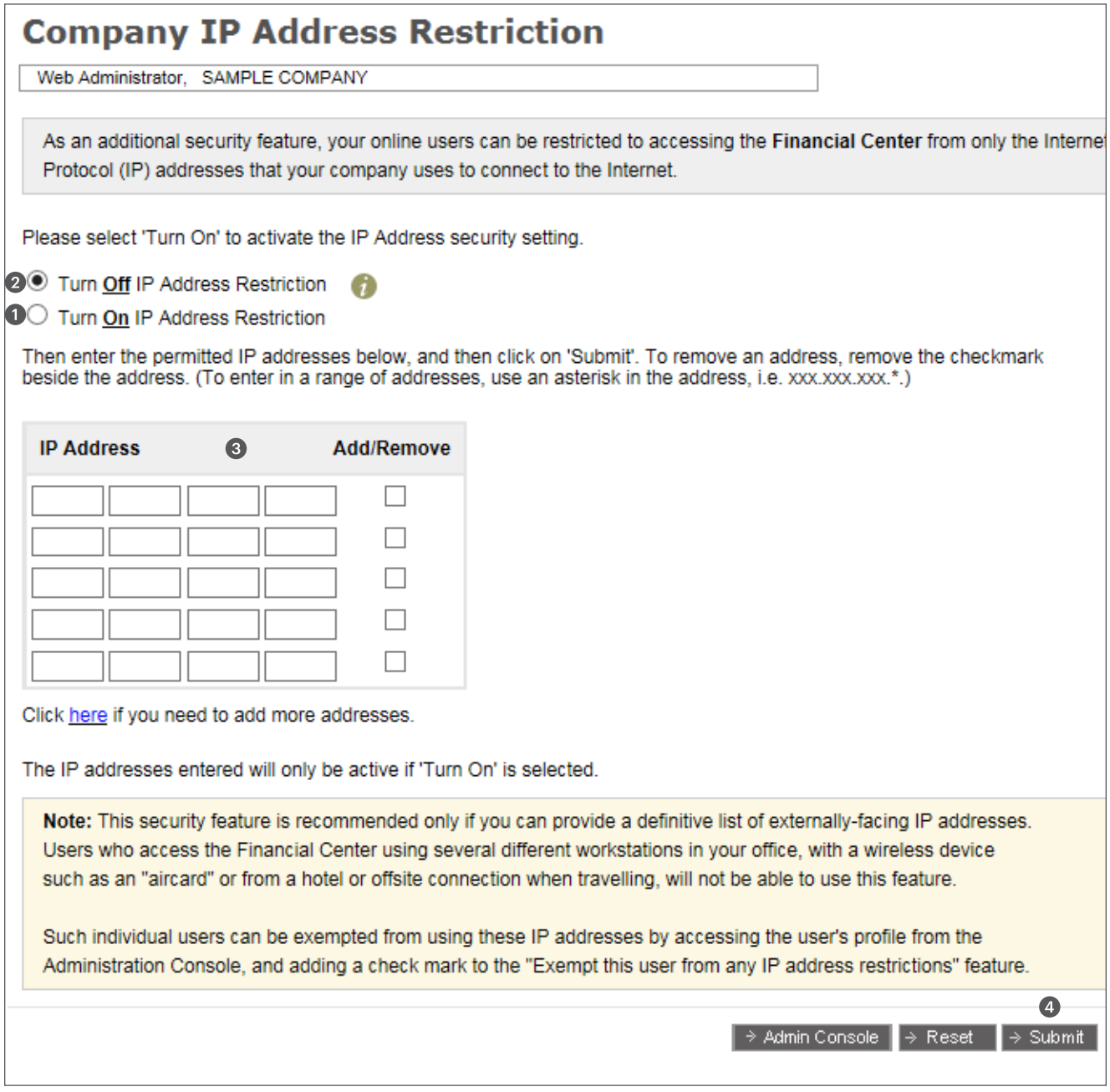
This page allows you to;

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.



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8913528-MB (11/21)