

GETTING STARTED

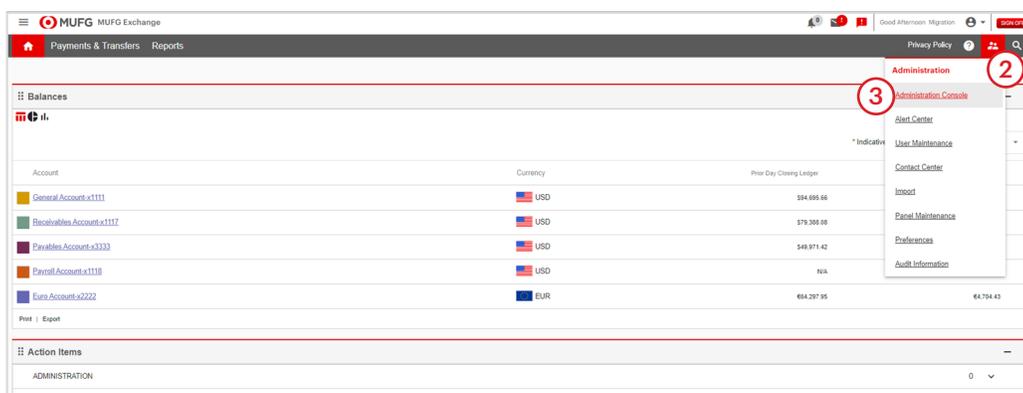
MUFG Exchange has several features to help mitigate risk in digital banking. One way to do that is the creation of two different types of Users: Administrators and Users.

- **Web/Security Administrators** are designated employees who can manage employee access to online services and, if appropriate, perform day-to-day activities.
- **Users** are employees for the company that have been entitled to use specific online services by the Administrators.

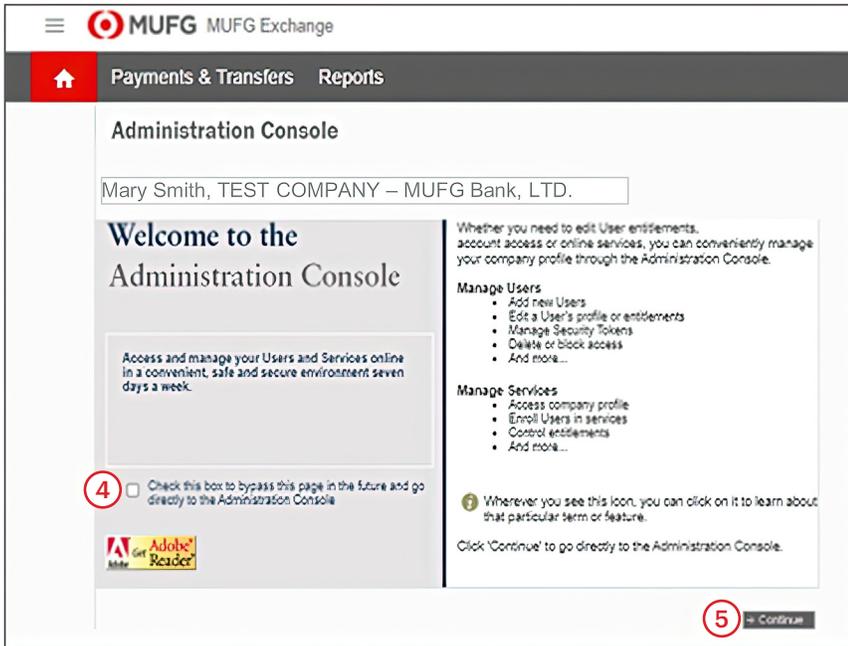
During the implementation phase of your MUFG Exchange services, your company designated a minimum of two Administrators. The bank has created these designated Administrators and entitled them to all the services your company requested on MUFG Exchange. These designated Administrators can create new Users, Roles, or additional Administrators. One Administrator will create or change the user and entitlements and a second Administrator will approve the addition or changes. Either Administrator can act in the create, change, or approve role depending on your company assignments; note that all users must be in an approved status before changes will take effect.

Creating a New User

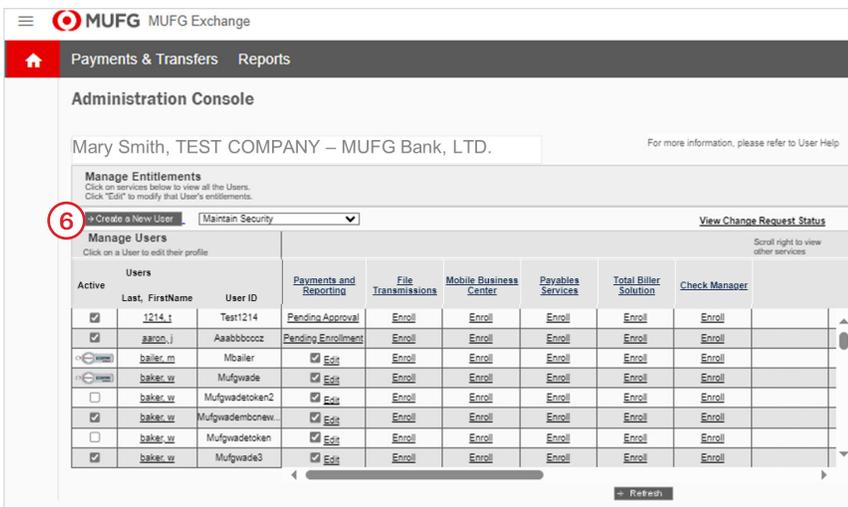
1. Sign into MUFG Exchange at <https://sso.mufgbank.com> using your personal User ID and Passcode. The system will open on the MUFG Exchange Home Page.
2. Click the People icon near the upper right corner.
3. Click on Administration Console in the drop-down menu.



- The Administration Console Welcome Page loads providing information about this section. This box will appear each time you open the Administration Console. Click the box to bypass this page in the future.
- Click Continue.



- The Manage Entitlements page will load. Click on the Create a New User button.



MUFG Exchange
 Payments & Transfers Reports
Create a New User
 Mary Smith, TEST COMPANY – MUFG Bank, LTD.
 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.
This User ID is unique and can be used to create a user in SSO.
 * User ID: [Check Availability](#)
 * First Name:
 Middle Name:
 * Last Name:
 * Work Number: ext.:
 Mobile 1:
 * Email:
 * Confirm 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

7. The Create New User screen will load. Begin by entering your desired User ID for the new user.

Important: User ID must be between 7 and 32 letters and/or numbers, no spaces and no special characters (!, @, \$, %, &). User IDs are not case sensitive.

8. Click the Check Availability link.

9. The system will return a message indicating if the entered User ID is available to be used. Possible messages are:

- “User ID is invalid” means that the User ID does not meet the specifications explained above. Please return to step 7.
- “User ID is already taken”, means that you will need to use a different User ID. Please return to step 7.
- “This User ID is unique and can be used to create a user in SSO.” Proceed to step

10. Enter the required information as indicated by the red asterisk (*):

- First and last name
- Work Phone Number
- Email Address

11. User Type will be prefilled as Web User. If the User is to be an Administrator, click the radio button next to this choice to change it.

Important: An Administrator has the ability to add and manage Users and Roles in the Administration Console. Administrator can also manage tokens and passwords. Web Users do not have these entitlements.

12. Language will be prefilled with English; however, if appropriate, click the radio button to change the User’s system to Japanese.

13. It is highly recommended that you leave the check mark so that the user will be sent High Risk Transactions Email.

14. Click Submit.

- After clicking the Submit button your screen will return to the Administration Console Manage Entitlements screen. A message in red will tell you that you have successfully added the user.
- Locate the user you just created and click their name.

Administration Console

Mary Smith, TEST COMPANY – MUFG Bank, LTD 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](#)

The user New User is created successfully. 15

Manage Users Scroll right to view other services

Click on a User to edit their profile

Active	Last, First Name	User ID	Payments and Reporting	File Transmissions	Mobile Business Center	Payables Services	Total Biller Solution	Check Manager
<input checked="" type="checkbox"/>	16 User, N	Nuser123	Enroll	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	012724tester00	012724tester00	Edit	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	012724testm01	012724testmp...	Edit	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	1214_J	Test1214	Edit	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	240120test01	240120test01	Edit	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	240120test02	240120test02	Pending Approval	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	aaron.J	Aaabbcccc	Pending Enrollment	Enroll	Enroll	Enroll	Enroll	Enroll
<input checked="" type="checkbox"/>	baller_m	Mboller	Edit	Enroll	Enroll	Enroll	Enroll	Enroll

[Refresh](#)

- The Edit User Profile screen will appear. Click the **Assign Security Token** button to start the process of assigning a token to this User.

MUFG MUFG Exchange

[Payments & Transfers](#) [Reports](#)

Edit User Profile

Mary Smith, TEST COMPANY – MUFG Bank, LTD.

[Edit User Info](#)

User ID : nuser123

Last Valid Login :

Last Contact Info Review :

First Name : New

Middle Name :

Last Name : User

Email Address : NXXXXX@testcompany.com

Send High Risk Transactions email :

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

User Type ? : Web User

Security Maintenance ?

User Access Status: Active

Challenge Questions Status: Inactive

Last Challenge Questions Change:

[Manage User Phones](#)

[Lock User Access](#)

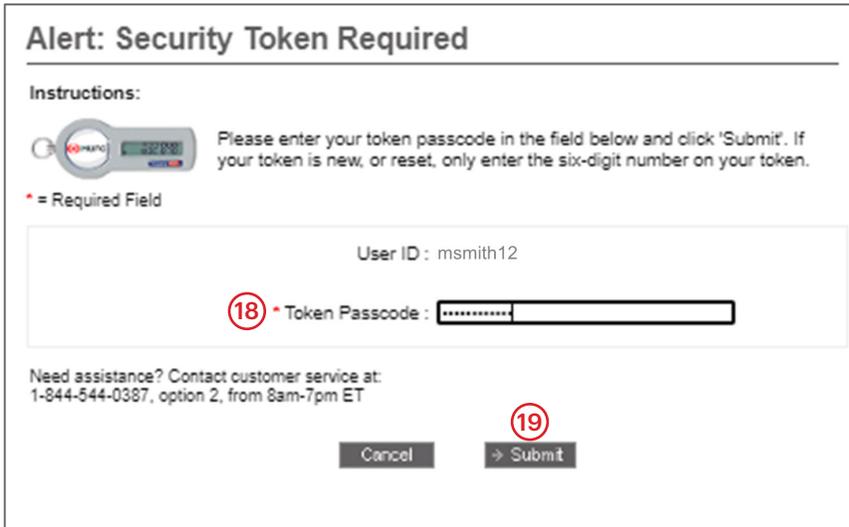
17 [Assign Security Token](#)

[Permanently Delete User](#)

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

[Admin Console](#)

- An Alert screen will appear stating that your Security Token is Required to proceed. Your User ID will be prefilled. Enter your **Token Passcode** which is your six-digit password plus the six digits on your token.
- Click **Submit**.



Alert: Security Token Required

Instructions:

 Please enter your token passcode in the field below and click 'Submit'. If your token is new, or reset, only enter the six-digit number on your token.

* = Required Field

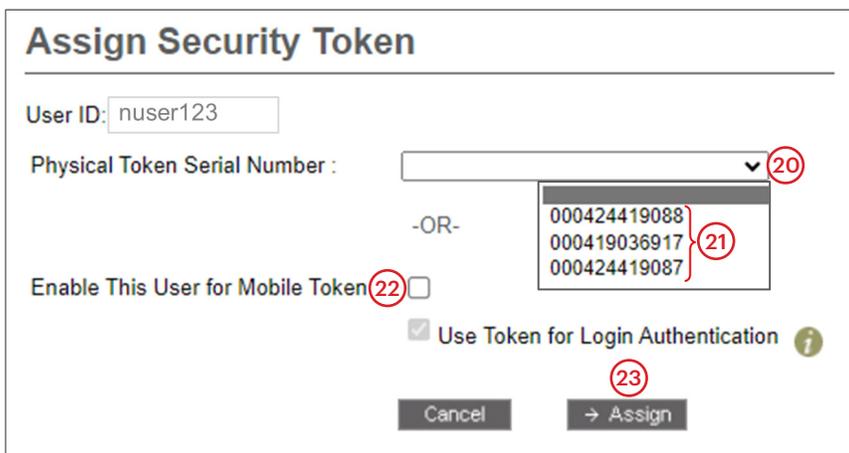
User ID: msmith12

18 * Token Passcode :

Need assistance? Contact customer service at:
1-844-544-0387, option 2, from 8am-7pm ET

Important: MUFG offers two kinds of tokens: a physical (hard) token or a mobile token. A mobile token is the default choice. A User may only have one token at any point in time.

- Assign Security Token screen is presented. If a hard token is to be assigned, click the drop-down arrow to see the list of available hard tokens.
- If using hard tokens, choose the token serial number that matches the serial number on the back of the token.
- If a mobile token is to be assigned, click the box to the right of Enable this User for Mobile Token.
- When you have completed your choice, click the Assign button.



Assign Security Token

User ID:

Physical Token Serial Number : **20**

-OR-

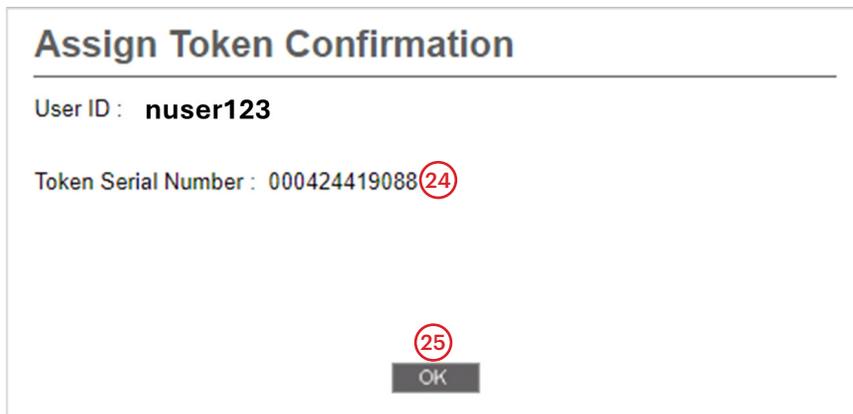
22 Enable This User for Mobile Token

Use Token for Login Authentication  **23**

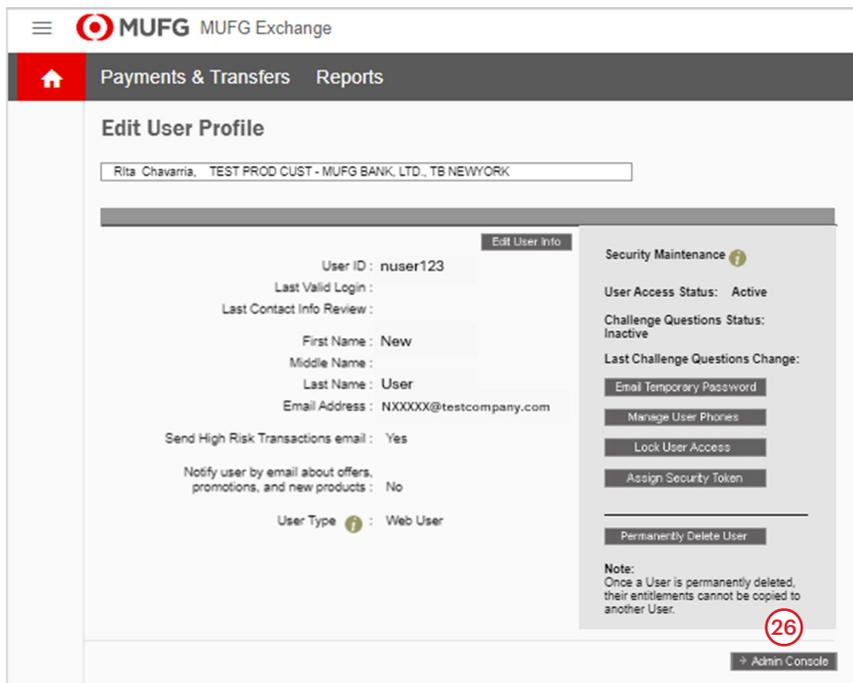
21

000424419088
000419036917
000424419087

24. A screen will be presented confirming that the token has been assigned. The Token Serial Number on the screen will be the same as the serial number that you choose for a hard token. If you assigned a mobile token, the serial number will be blank.
25. Click Ok to complete the token assignment. If the user was assigned a physical token, go to Step 26. If the user was assigned a mobile token, go to Step 27.



26. If the user was assigned a physical token, you will be returned to the Edit User Profile screen. Click Admin Console button to return to the Administration Console Manage Entitlements screen. When signing on for the first time with a physical token, the user will not need a temporary password. Go to Step 30.



27. If the user was assigned a mobile token, they will need a temporary password the first time they sign onto MUFG Exchange. Click the Email Temporary Password button. This will generate an email to the user with their temporary password.
28. A message will display indicating that the temporary password will be sent to this user. If the user does not receive the email within approximately 15 minutes, have them check their spam folder.
29. Click Admin Console button to return to the Administration Console Manage Entitlements screen.

Edit User Profile

Mary Smith, TEST COMPANY – MUFG Bank, LTD.

28 The temporary password is sent to the user New User.

Edit User Info

User ID : **nuser123**
 Last Valid Login :
 Last Contact Info Review :
 First Name : New
 Middle Name :
 Last Name : User
 Email Address : NXXXr@testcompany.com
 Send High Risk Transactions email : Yes
 Notify user by email about offers, promotions, and new products : No
 User Type : Web User

Security Maintenance

User Access Status: Active
 Challenge Questions Status: Inactive
 Last Password Change:
 Last Challenge Questions Change:

27 Issue Temporary Password
 Manage User Phones
 Lock User Access
 Assign Security Token

29 Permanently Delete User

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

Admin Console

30. Locate the User that you just created. Click on the word Enroll in the Payments and Reporting column.

MUFG MUFG Exchange

Payments & Transfers Reports

Administration Console

Mary Smith, TEST COMPANY – MUFG Bank, LTD. 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	Last, FirstName	User ID	Payments and Reporting	File Transmissions	Mobile Business Center	Payables Services	Total Biller Solution	Check Manager
<input checked="" type="checkbox"/>	User, n	Nuser123	30 Enroll	Enroll				
<input checked="" type="checkbox"/>	bird, s	Bluebird2	Enroll	Enroll				
<input checked="" type="checkbox"/>	deluca, d	Migratonusero...	Enroll	Enroll				
<input type="checkbox"/>	dse, j	Testuserjd	Enroll	Enroll				
<input checked="" type="checkbox"/>	dse, i	Testest111111	Enroll	Enroll				
<input checked="" type="checkbox"/>	dsg, m	Mawdog1	Pending Enrollment	Enroll				
<input checked="" type="checkbox"/>	elght, m	Migratonusere...	Enroll	Enroll				
<input type="checkbox"/>	slp2tean, a	Adminnameight...	Pending Approval	Enroll				

Scroll right to view other services

Refresh

-
31. A confirmation message will load confirming that the user has been enrolled in Payments and Reporting services. Click Continue.

Payments & Reporting Services

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

Customer Name : **TEST PROD CUST - MUFG BANK, LTD.,
TB NEWYORK**
User ID : **nuser123**
Last Name : **User**
First Name : **New**

Click continue to Create a New User and be directed to the User Maintenance Page 31

32. The system will take you to the User Maintenance of MUFG Exchange. Your new user has been created. The next step is to add User or Role Entitlements. The standard option for assigning entitlements is based on Roles. For additional instructions please refer to the Role Based Entitlements Quick Reference Guide. If you are set up with User based entitlements, please refer to the User Based Entitlements Quick Reference Guide. Both reference guides are available at the MUFG Exchange Microsite at <https://mufgexchange.com/>.