



XMLdation Service User and Administrator Guide

2023

Content

01 Signing in

02 File Testing

Viewing guides and sample files

Validating files

Simulating response files

Creating files

Support

03 Administration

Managing users

Tracking user activity

Company configuration

Signing in



Sign in

English ▼

Sign in with your username and password

Username

Password

Sign in

[Forgot your username?](#)

[Forgot your password?](#)

Powered by XMLdation

Signing in

On first sign in

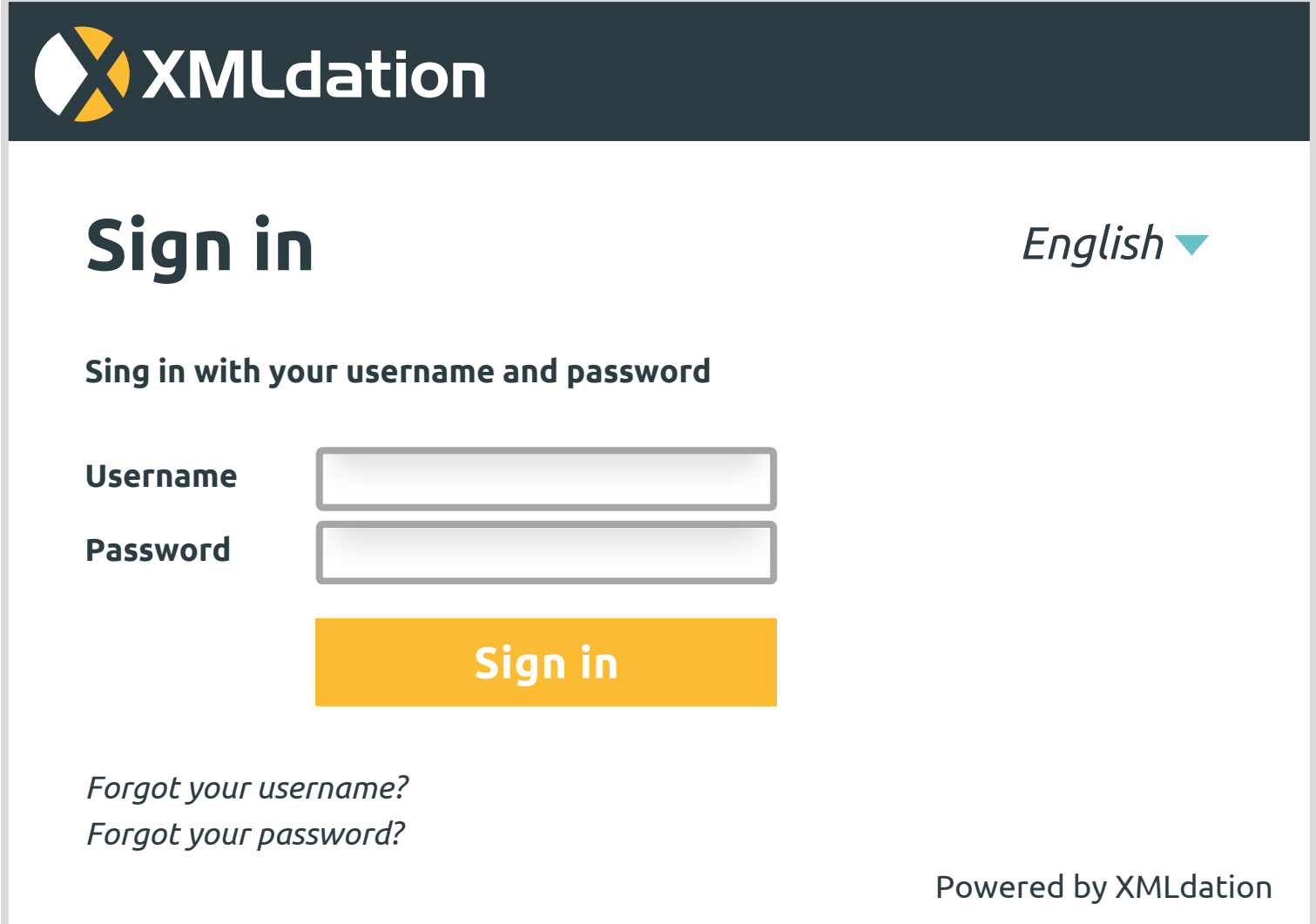
- Enter your username and password.
- You may be asked to give a security code, which you will receive via email. Enter this code.
- You may be asked to review your information. When ready, select “Continue”.
- Accept the Terms of Use.
- Change your password.
- Now you are ready to start working!

Signing in again

- Enter your username and password.

Please note

- You may be requested to change your password occasionally.
- From time to time you may be asked to give a security code, which you will receive via email.



The screenshot shows the XMLdation sign-in interface. At the top left is the XMLdation logo, consisting of a stylized 'X' icon and the text 'XMLdation'. To the right of the logo is the text 'English' with a downward-pointing triangle indicating a language dropdown menu. Below the logo and language is the heading 'Sign in'. Underneath the heading is the instruction 'Sing in with your username and password'. There are two input fields: 'Username' and 'Password', each with a corresponding text box. Below the input fields is a prominent orange button labeled 'Sign in'. At the bottom left of the form area, there are two links: 'Forgot your username?' and 'Forgot your password?'. At the bottom right, it says 'Powered by XMLdation'.

Signing in FAQ

Where do I get my username or password?

Contact support or your administrator.

I have been prompted to enter a security code but I have not received it.

1. Check the spam or junk folder in your email.
2. Try again - click to "Resend code".
3. Contact support or your administrator.

I can't remember my password.

1. Go to the Sign in page.
2. Click on "Forgot your password".
3. Enter your username.
4. Your password will be sent to your email.

I want to change my password.

1. Go to the Preferences page in the upper right corner while logged in or
2. Select "Forgot my password" on the Sign in page.

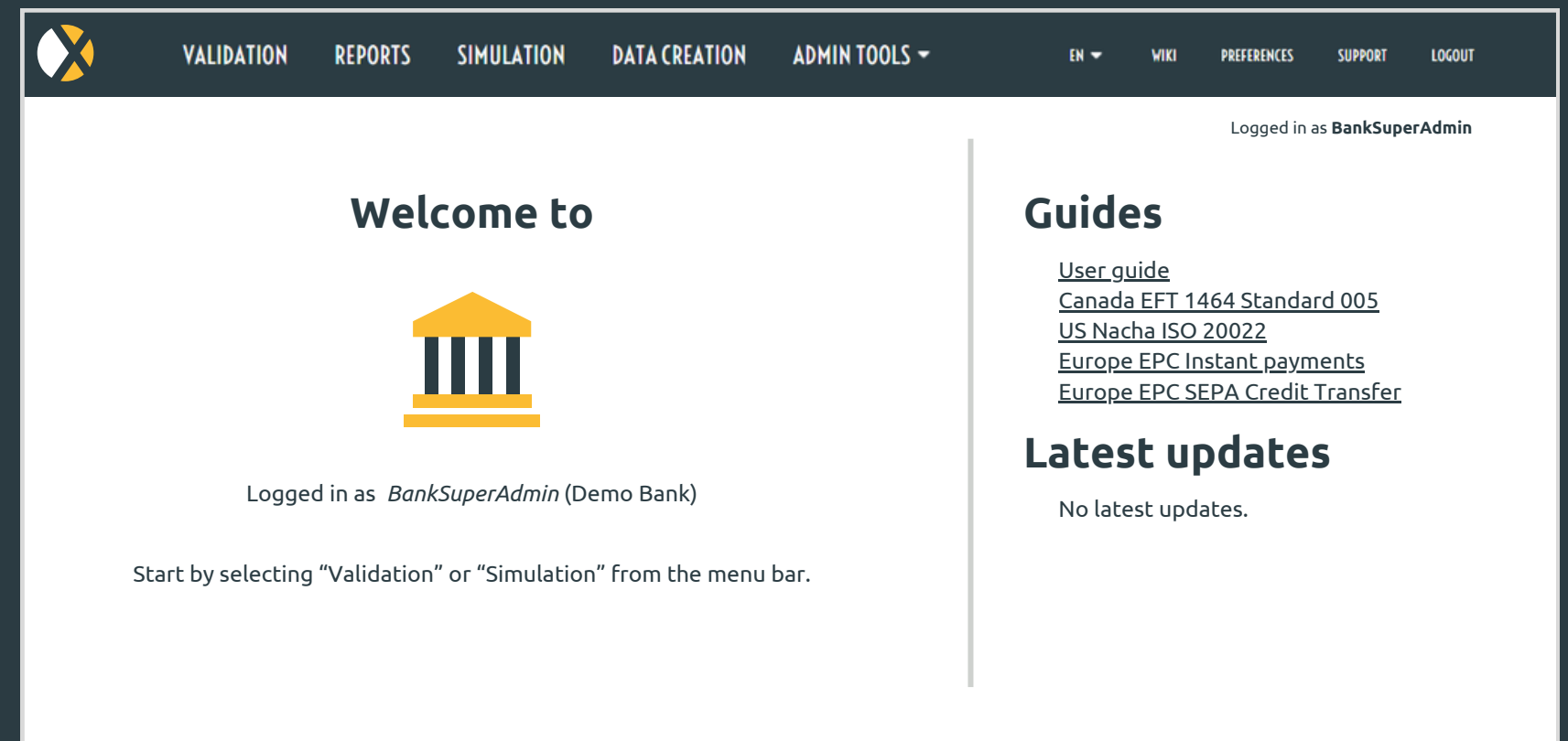
I can't remember my username.

1. Go to the Sign in page.
2. Click on "Forgot my password".
3. Enter your email address.
4. Your username will be sent to your email.

I can't sign in because I keep getting an "invalid captcha" error.

1. If you are not sure of your password, click on "Forgot my password" to get a new password.
2. Some captchas are difficult to read. You can keep retrying and might find one that works for you.
3. Contact support or your administrator.

Viewing guides and sample files



The screenshot shows a web application interface with a dark blue header. The header contains a logo on the left, followed by navigation links: VALIDATION, REPORTS, SIMULATION, DATA CREATION, and ADMIN TOOLS. On the right side of the header, there are links for EN, WIKI, PREFERENCES, SUPPORT, and LOGOUT. Below the header, the main content area is white. In the top right corner of the main area, it says "Logged in as BankSuperAdmin". The main content is divided into two columns. The left column has a heading "Welcome to" above a yellow icon of a classical building with columns. Below the icon, it says "Logged in as BankSuperAdmin (Demo Bank)" and "Start by selecting 'Validation' or 'Simulation' from the menu bar." The right column has a heading "Guides" followed by a list of links: [User guide](#), [Canada EFT 1464 Standard 005](#), [US Nacha ISO 20022](#), [Europe EPC Instant payments](#), and [Europe EPC SEPA Credit Transfer](#). Below the guides is a heading "Latest updates" with the text "No latest updates."

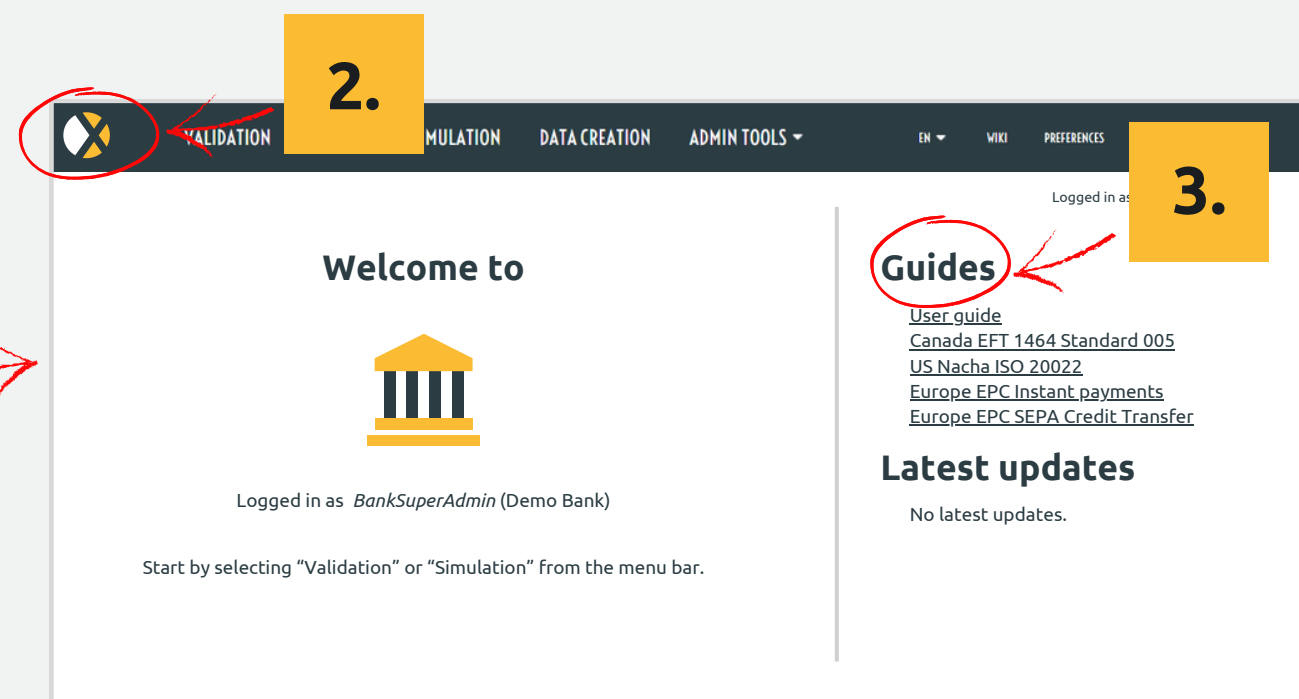
Viewing guides and sample files

Guides

1. Guides available in your Service are on the Front Page
2. Go to the Front Page by clicking on the icon on left hand of the navigation bar
3. Guides are listed in the top right hand of the page

1.

This is the Front Page

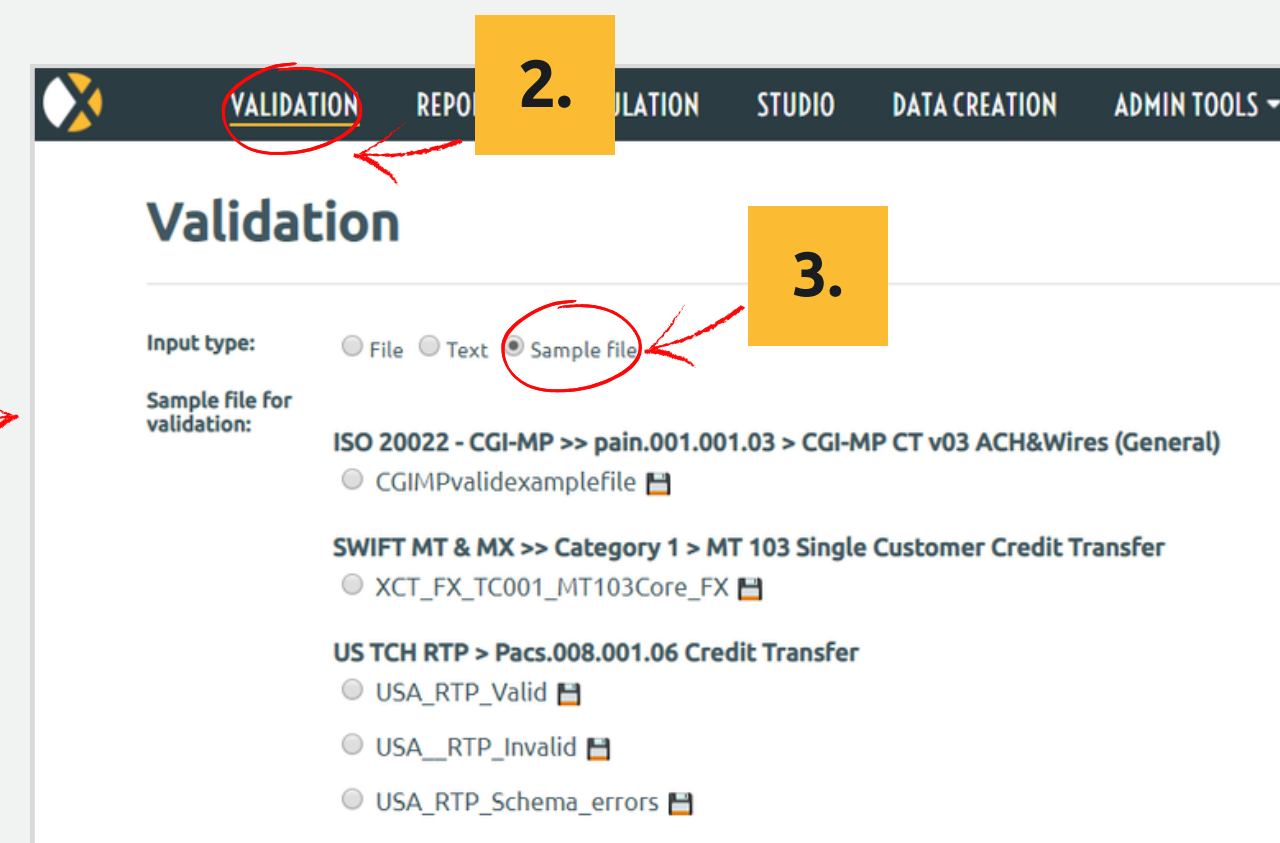


Sample Files


1. Sample Files available in your Service can be viewed from the Validation Page
2. Go to Validation Page by clicking on "Validation" on the navigation bar
3. To view sample files, click on the "Sample File" option next to "Input Type"

1.

This is the Validation Page



Validating files



VALIDATION REPORTS SIMULATION

Validation

Input type: File Text Sample file

File for validation:

Select the file which you want to validate. The maximum allowed file size is 5MB.

Comment:

Using a comment e.g. customer name or other identification can help you to find and identify the validation report afterwards.

Validate

Validating files

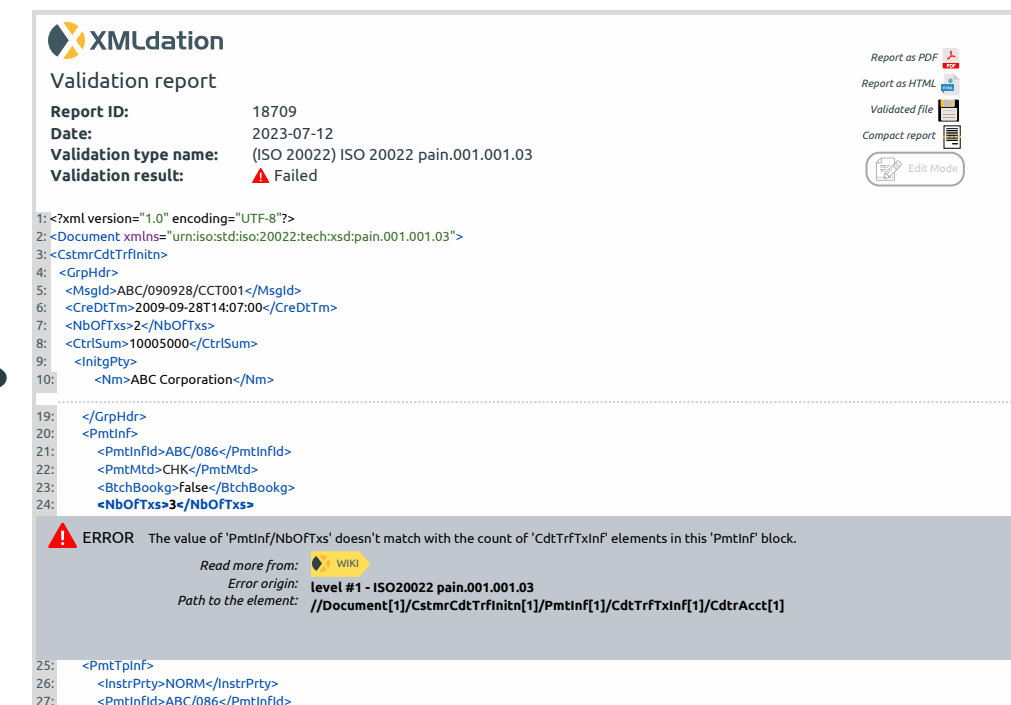
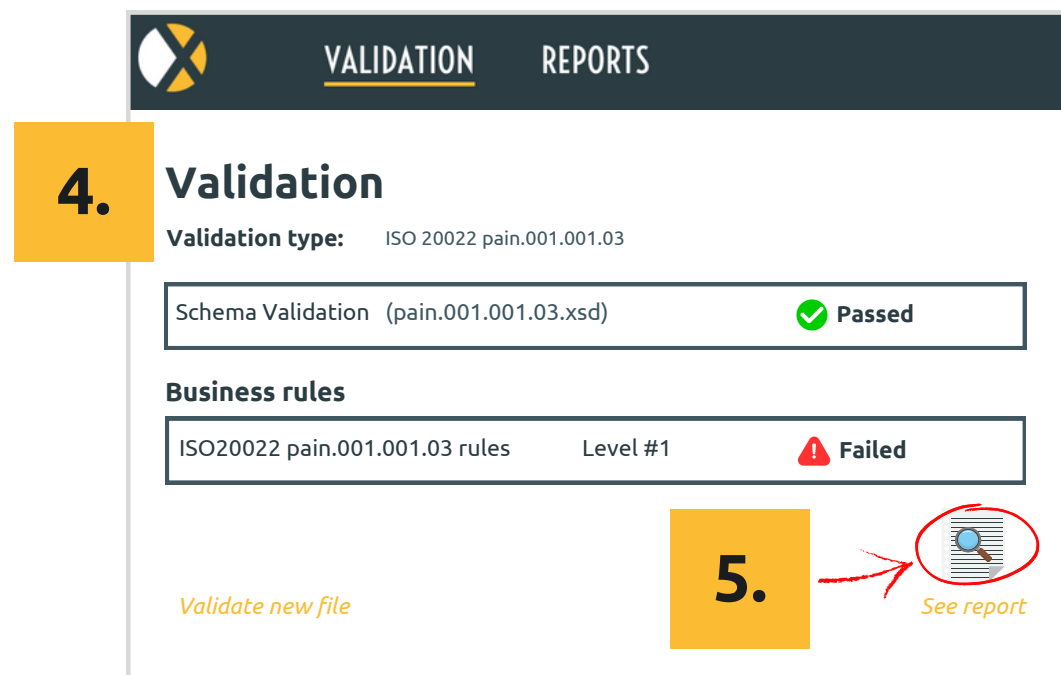
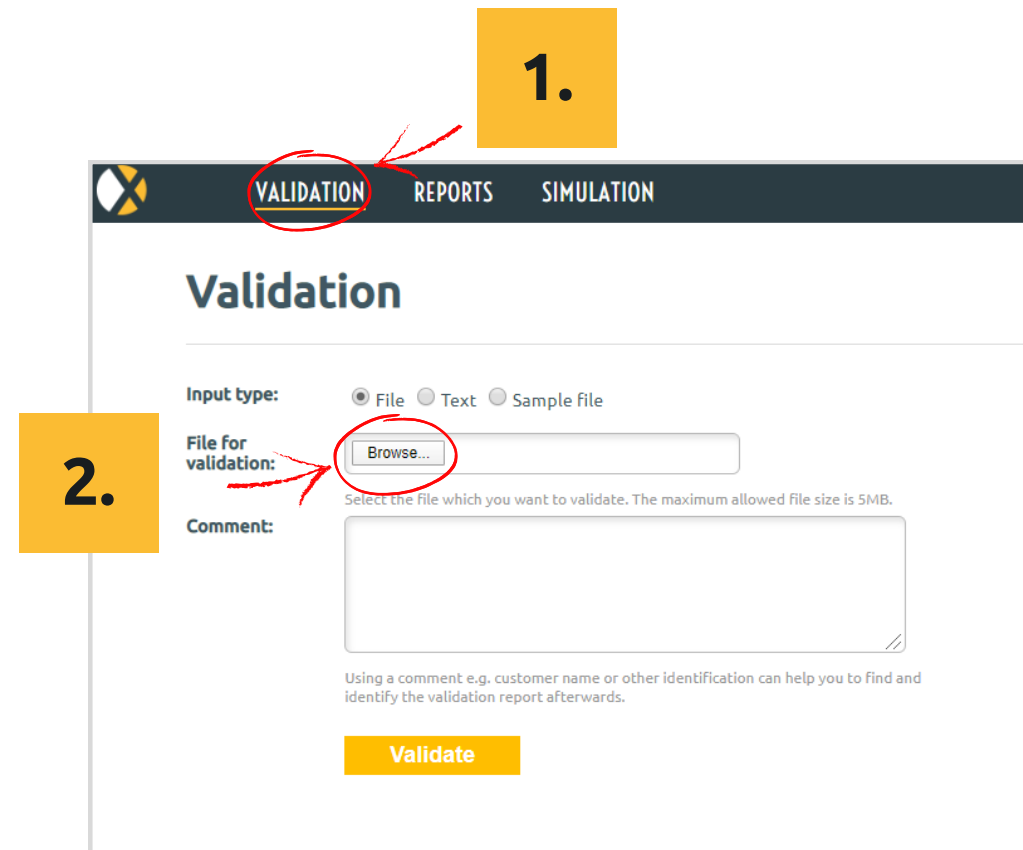
- 1 Click on “Validation” on the Navigation Bar
- 2 Select a file for validation from your local file system
 - Click on the “Browse” button
 - Select the file
 - Click “Validate”

The file formats available in your Service are listed

- 3 To start the Validation, select the validation type for your file (the file format)

- 4 View the summary results of the validation

- 5 Click on “See Report” to view full report

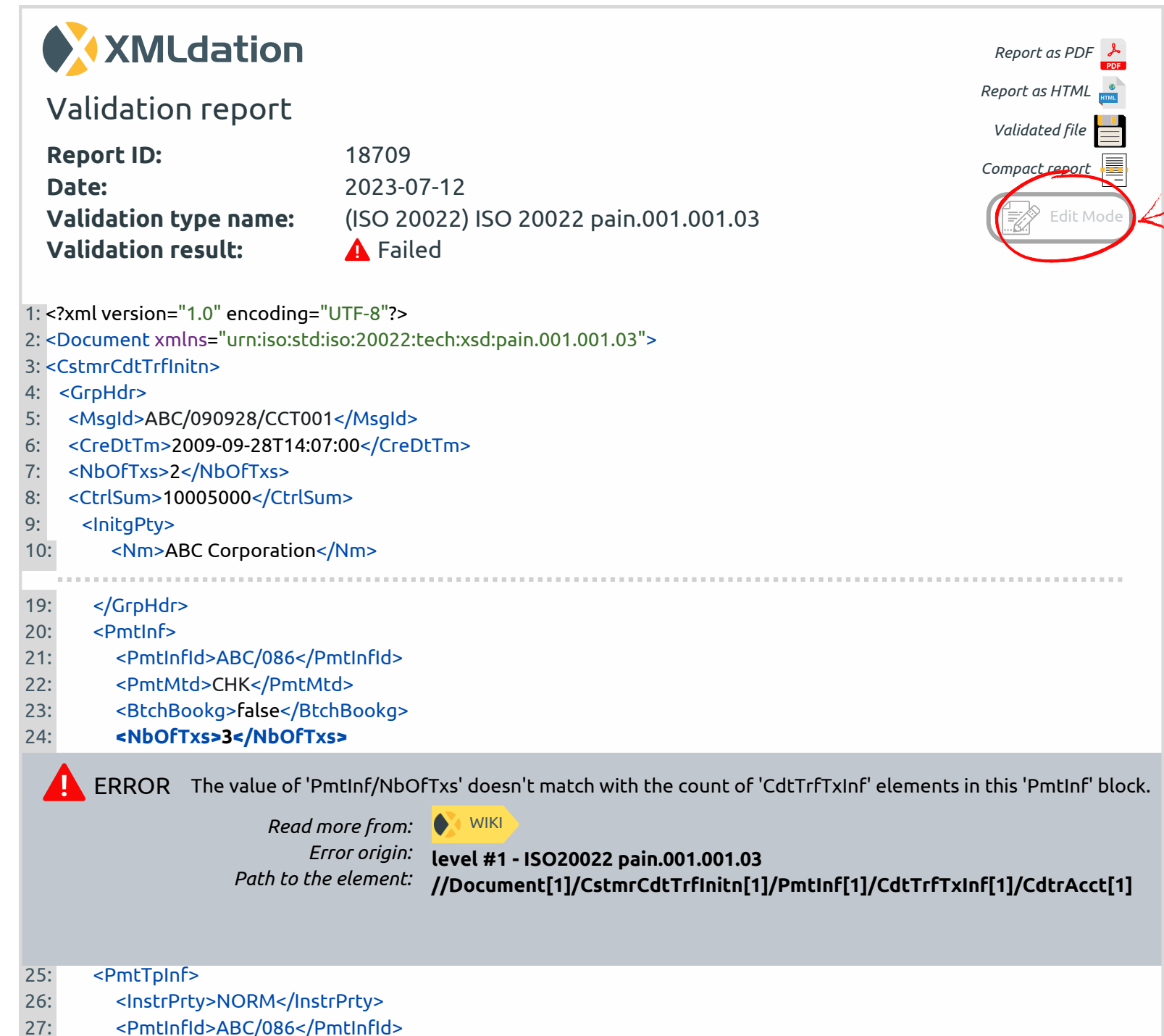


Editing validation reports to correct errors


1 Click on "Edit Mode"






Edit values in the file, and revalidate.

The user can manually edit and revalidate the payment file from the validation report before implementing changes in their production system. This editing feature allows direct modifications without altering the original file, and the modified version can be downloaded for reference.





XMLdation
Validation report

Report ID: 18709
Date: 2023-07-12
Validation type name: (ISO 2022) ISO 2022 pain.001.001.03
Validation result:  Failed

Report as PDF 
Report as HTML 
Validated file 
Compact report 
Edit Mode 

```
1: <?xml version="1.0" encoding="UTF-8"?>
2: <Document xmlns="urn:iso:std:iso:20022:tech:xsd:pain.001.001.03">
3: <CstmrCdtTrfInitn>
4: <GrpHdr>
5:   <MsgId>ABC/090928/CCT001</MsgId>
6:   <CreDtTm>2009-09-28T14:07:00</CreDtTm>
7:   <NbOfTxs>2</NbOfTxs>
8:   <CtrlSum>10005000</CtrlSum>
9:   <InitgPty>
10:     <Nm>ABC Corporation</Nm>
19:   </GrpHdr>
20:   <PmtInf>
21:     <PmtInfd>ABC/086</PmtInfd>
22:     <PmtMtd>CHK</PmtMtd>
23:     <BtchBookg>>false</BtchBookg>
24:     <NbOfTxs>3</NbOfTxs>
25:   <PmtPlnf>
26:     <InstrPrty>NORM</InstrPrty>
27:     <PmtInfd>ABC/086</PmtInfd>
```

 **ERROR** The value of 'PmtInf/NbOfTxs' doesn't match with the count of 'CdtTrfTxInf' elements in this 'PmtInf' block.

Read more from:  WIKI
Error origin: **level #1 - ISO20022 pain.001.001.03**
Path to the element: **//Document[1]/CstmrCdtTrfInitn[1]/PmtInf[1]/CdtTrfTxInf[1]/CdtAcct[1]**

1.

Viewing historical validation reports

1 Click on “Reports” on the navigation bar
The screen lists Validation Reports for validations previously run by the user.

2 To view a report, click on the report line

If no reports are listed, your environment might be configured to delete reports automatically on user logout.

The screenshot shows the 'REPORTS' section of a web application. The navigation bar at the top has 'VALIDATION', 'REPORTS', and 'SIMULATION' tabs. The 'REPORTS' tab is circled in red, with a yellow box containing the number '1.' and an arrow pointing to it. Below the navigation bar, there is a 'Report filtering options' section with a 'Go' button. A table lists two reports from 'Apr 14' at '14:37'. The first report, 'CGIMPvalidexamplefile.xml', has a 'Failed' result and is circled in red, with a yellow box containing the number '2.' and an arrow pointing to it. The second report, 'CGIMPvalidexamplefile.xml', has a 'Passed' result. Below the table, there are two side-by-side panels for 'Left file for diff' and 'Right file for diff', each with 'Upload file' and 'Report id' options. A yellow button labeled 'See the differences' is positioned below these panels. At the bottom right, there are links for 'User guide', 'Terms of use', and '© 2020 XMLdation Ltd'.

	Time	File	Validation type	Result	Report id	Action
Apr 14	14:37	CGIMPvalidexamplefile.xml	CGI-MP CT v03 ACH&Wires (General)	Failed	171812	✘
	14:37	CGIMPvalidexamplefile.xml	CGI-MP CT v03 ACH&Wires (General)	Passed	171811	✘

Comparing files

- 1** Click on "Reports" on the navigation bar
The option to compare two files is at the end of the Reports screen
- 2** Browse to upload the first file
Or enter the Report id of one of the listed reports
Or hover over a Report Id and click Left
- 3** Browse to upload the second file
Or enter the Report id of one of the listed reports
Or hover over a Report Id and click Right
- 4** Click "See the differences"
- 5** View the differences

Diff result

```
OVERVIEW Drag me
CGIMPVALIDEXAMPLEFILE.XML (REPORT ID:171812)
1: <?xml version="1.0" encoding="UTF-8"?>
2: <Document xmlns="urn:iso:std:iso:20022:tech:xsd:pain.001.001.03"
3: <CstmrCdtTrfInitt
4: <GrpHdr>
5: <MsgId>MsgId unique string 2htK9v</MsgId>
6: <CreDtTm>2020-04-14T11:37:09</CreDtTm>
7: <NbOfTx>3</NbOfTx>
8: <CtrlSum>10000</CtrlSum>
9: <InitgPty>
10: <Nm>ABC Corporation</Nm>
11: <Id>
12: <OrgId>
13: <Othr>
14: <Id> 222010012</Id>
15: </Othr>
16: </OrgId>
17: </Id>
18: </InitgPty>
19: </GrpHdr>

CGIMPVALIDEXAMPLEFILE.XML (REPORT ID:171811)
1: <?xml version="1.0" encoding="UTF-8"?>
2: <Document xmlns="urn:iso:std:iso:20022:tech:xsd:pain.001.001.03"
3: <CstmrCdtTrfInitt
4: <GrpHdr>
5: <MsgId>MsgId unique string 2htK9v</MsgId>
6: <CreDtTm>2020-04-14T11:37:09</CreDtTm>
7: <NbOfTx>1</NbOfTx>
8: <CtrlSum>10000</CtrlSum>
9: <InitgPty>
10: <Nm>ABC Corporation</Nm>
11: <Id>
12: <OrgId>
13: <Othr>
14: <Id> 222010012</Id>
15: </Othr>
16: </OrgId>
17: </Id>
18: </InitgPty>
19: </GrpHdr>
```

Validating files FAQ

What do Error, Notice and Info mean?

Error: must be fixed to avoid file or payment failures

Notice: recommendation

Info: additional information

What is a schema error?

An error in the file structure. For example, for an XML file, the tags may be wrong. If a schema error is detected, the business rules are not checked.

What is a business rule error?

An error in the content within the fields in the file.

What are the Wiki links?

Links to more information about the error of the file specification.

What if I don't understand the error?

Contact support or your administrator.

Can I use copy and paste to validate file content?

Yes. Select Input Type 'text' on the Validation Page, paste file contents into the test area, and validate.

Can I send the report to someone?

Yes. You can email a PDF version. To get the PDF, click on "Report as PDF" in the top right of the report.

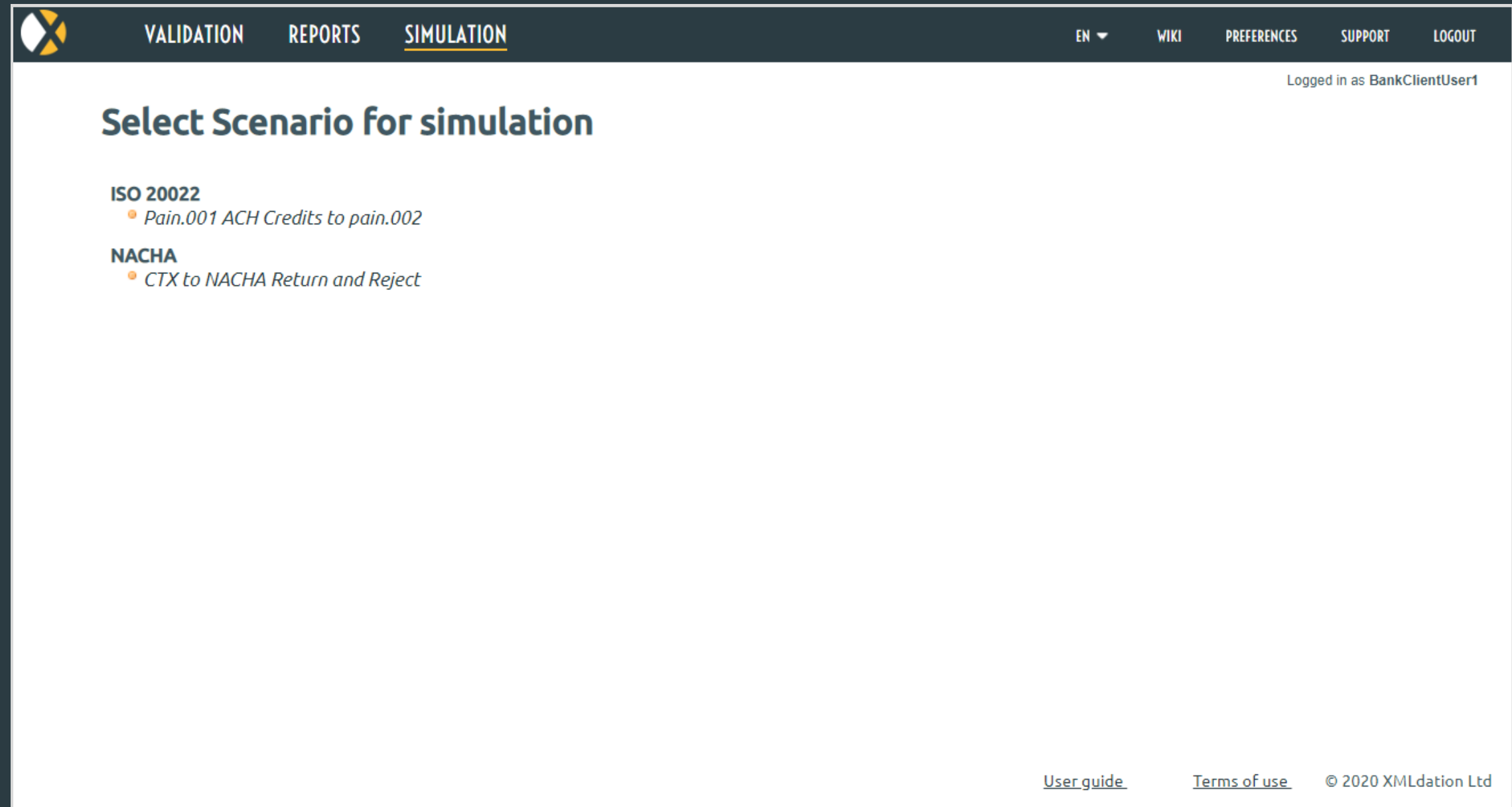
Can I download an edited file?

Yes. Click on "Validated file" in the top right of the report.

Why are there no Validation reports listed on the Reports screen?

Your system may be configured to delete Validation reports automatically on logout.

Simulating response files



The screenshot shows a web application interface for simulating response files. At the top, there is a navigation bar with a logo on the left and menu items: VALIDATION, REPORTS, and SIMULATION (which is underlined). On the right side of the navigation bar, there are links for EN, WIKI, PREFERENCES, SUPPORT, and LOGOUT. Below the navigation bar, the user is logged in as BankClientUser1. The main content area is titled "Select Scenario for simulation" and lists two categories: ISO 20022 and NACHA. Under ISO 20022, there is one scenario: Pain.001 ACH Credits to pain.002. Under NACHA, there is one scenario: CTX to NACHA Return and Reject. At the bottom right of the page, there are links for User guide, Terms of use, and a copyright notice for © 2020 XMLdata Ltd.

VALIDATION REPORTS SIMULATION EN WIKI PREFERENCES SUPPORT LOGOUT

Logged in as BankClientUser1

Select Scenario for simulation

ISO 20022

- *Pain.001 ACH Credits to pain.002*

NACHA

- *CTX to NACHA Return and Reject*

[User guide](#) [Terms of use](#) © 2020 XMLdata Ltd

Simulating response files

1 Click on “Simulation” on the Navigation Bar

2 Select a scenario for simulation

3 Select an input file for the simulation from your local file system

- Click on the “Browse” button
- Select the file
- Click Upload

4 Process the uploaded file
The simulated response files are listed

5 View the simulated response files
Click “Preview/Open” or “Download”
Use Preview/Open to view the simulated file in your browser. Use “Download” to download the file to your local file system.

The screenshot shows the 'SIMULATION' page in a web application. The navigation bar at the top has 'SIMULATION' circled in red, with a yellow box containing '1.' and an arrow pointing to it. Below the navigation bar, the page title is 'Select Scenario for simulation'. There are two scenario options: 'ISO 20022' with a sub-option 'Pain.001 ACH Credits to pain.002', and 'NACHA' with a sub-option 'CTX to NACHA Return and Reject'. A yellow box with '2.' and an arrow points to the 'ISO 20022' scenario. Below this, the page title is 'Simulation' and the scenario is 'Pain.001 ACH Credits to pain.002'. There is a 'Select a file:' section with a 'Browse...' button circled in red, with a yellow box containing '3.' and an arrow pointing to it. To the right of the 'Browse...' button is a table with one row: '1 ISO20022_Pain.001_For_Simulator.xml'. Below the table is a 'Process' button circled in red, with a yellow box containing '4.' and an arrow pointing to it. At the bottom, there is a table with two rows of simulated response files, with a yellow box containing '5.' and an arrow pointing to the first row. The table has columns 'Description' and 'File'. The first row is 'Whole Message Accepted' and the second row is 'One Transaction Rejected'. Both rows have 'Preview | Download' links.

Filename	Type	Active
1 ISO20022_Pain.001_For_Simulator.xml		<input checked="" type="checkbox"/> Delete

Description	File
Whole Message Accepted	Preview Download
One Transaction Rejected	Preview Download

Simulating response files FAQ

I don't see Simulation on my navigation bar.

The Simulator may not be configured in your environment. Contact support or your Administrator if you think you should have access to the Simulator.

What is the purpose of the Simulator?

The Simulator provides examples of bank response files so that you can review the content of the response files, and check that your system can read (parse) these files. For example, it will simulate a few examples of pain.002 payment status report files that you might expect to receive from the bank in response to a credit transfer pain.001 file.

The input file I uploaded to the simulator did not pass validation. What should I do?

The uploaded file is invalid for this simulator. Go to the Validation page, validate against the file format for the input file, and correct file. Then try the simulator again with the corrected file.

Does the simulator response files include data from my uploaded input file?

Yes. The simulator populates the response files with data from your uploaded input file.

The simulator shows a response file with a transaction error even though my input file did not contain an invalid transaction. Why is this?

This response file is included to help with your testing. You can expect to be notified of failed transactions at some stage, and your systems should be able to read files that indicate failed transactions.

Creating files

VALIDATION REPORTS SIMULATION STUDIO **DATA CREATION** ADMIN TOOLS ▾ EN ▾ WIKI PREFERENCES LOGOUT

Data creation

Search for...

- EBA File Generation
- US TCH RTP
- Real Time Payments
- ECB T2 RTGS
 - RTGS pacs.008.001.08
 - Multiple_files**
 - RTGS pacs.004.001.09
- Europe Deutsche Bundesbank
- IPSL

Generating Multiple_files

- Produces multiple files with one transaction. • The number of files is driven by the number of occurrences of data in the input.

Transactions

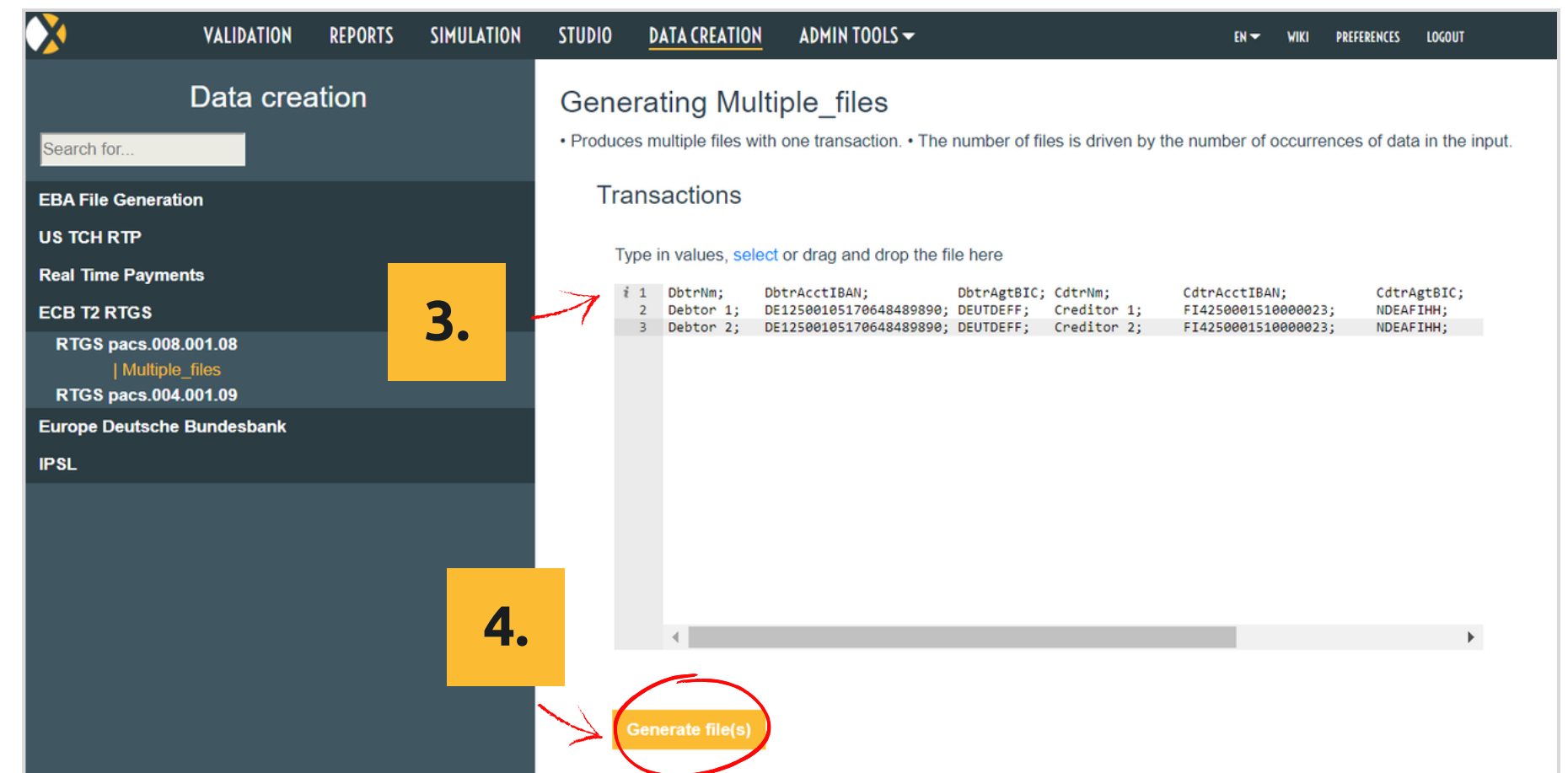
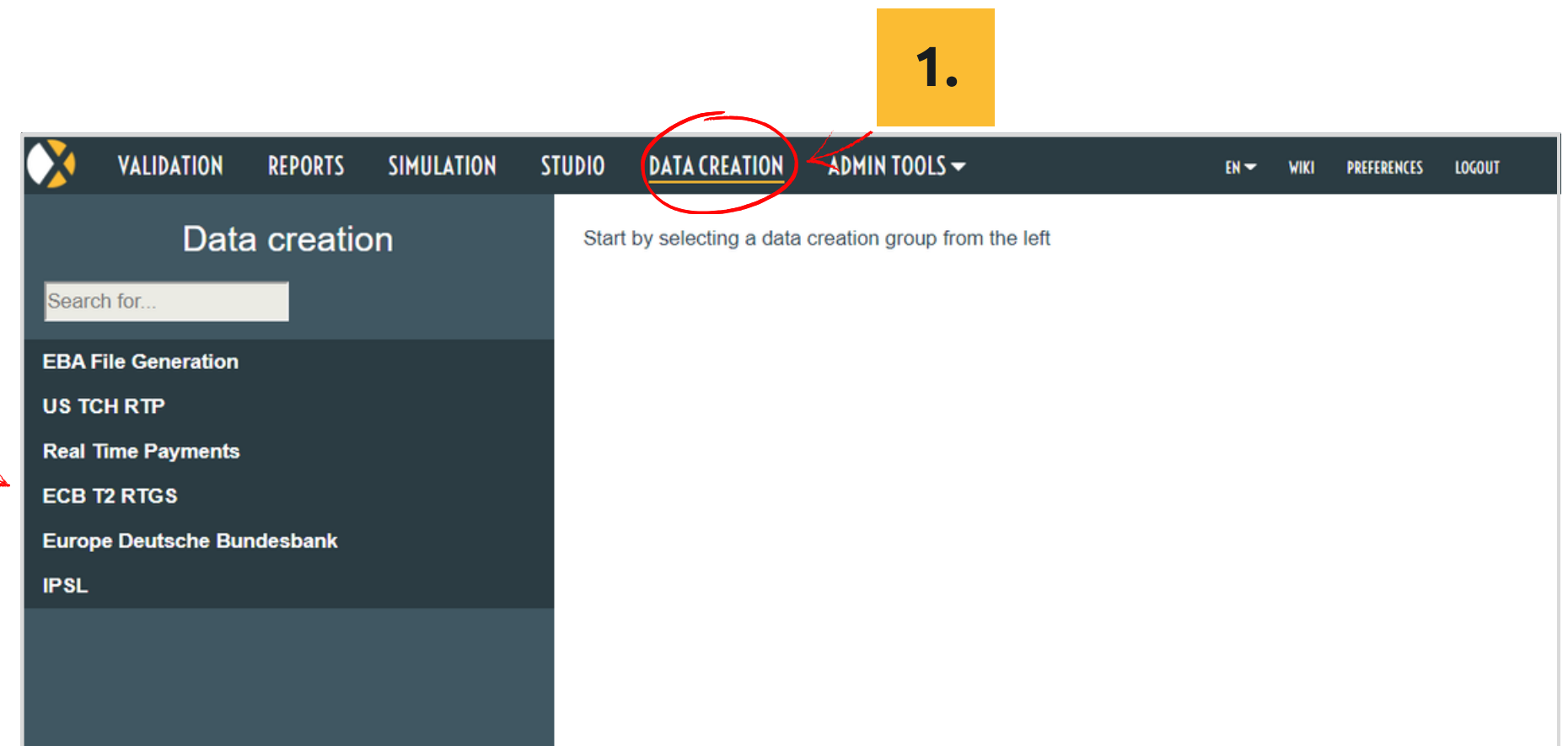
Type in values, [select](#) or drag and drop the file here

i 1	DbtrNm;	DbtrAcctIBAN;	DbtrAgtBIC;	CdtrNm;	CdtrAcctIBAN;	CdtrAgtBIC;
2	Debtor 1;	DE12500105170648489890;	DEUTDEFF;	Creditor 1;	FI4250001510000023;	NDEAFIHH;
3	Debtor 2;	DE12500105170648489890;	DEUTDEFF;	Creditor 2;	FI4250001510000023;	NDEAFIHH;

Generate file(s)

Creating files

- 1** Click on “Data Creation” on the navigation bar
- 2** Select a Data creation project from the lefthand list
- 3** **Enter data**
Type in data, copy and paste data, or provide a file containing data. Files can be selected from your local file system, or dragged and dropped onto the page
- 4** **Click “Generate File(s)”**
A zip of the created files is downloaded to your local machine



Creating files FAQ

I don't see Data Creation on my navigation bar.

The Data Creator may not be configured in your environment. Contact support or your Administrator if you think you should have access to the Data Creator.

What is the purpose of the Data Creator?

The Data Creator is used to create correctly formatted files based on data provided by the user.


For example, the user can enter information for a number of transactions and generate an ISO 20022 pain.001 credit transfer. The dates and identifier fields such as EndToEndId are generated in the background.

The Data Creator can be configured to create files that are invalid according to business rules.

Why is the Page called Data Creation rather than File Creation ?

Different terminology is in use for different formats. For example, file is commonly used for flat file formats, message is commonly used for ISO 20022 XML format and request is commonly used for JSON format. The term Data was chosen because it applies for all of these formats.

Requesting Support

 [VALIDATION](#) [REPORTS](#) [SIMULATION](#) [EN](#) [WIKI](#) [PREFERENCES](#) [SUPPORT](#) [LOGOUT](#) Logged in as BankClientUser1

Support [User guide](#)

Please check our *Wiki* for answers before submitting your question.

Recipient: support@xmldation.com

Type:

- Request
I have a question or need something
- Incident
something is broken

Subject:

Report id:

If you need assistance regarding an individual report, please provide the numeric report id here. The report id can be found at the top of the validation report.

***Email:**

***Description:**

Please provide us with a description of the issue you are having.

Marked fields(*) are required.

[Send](#)

[User guide](#) [Terms of use](#) © 2020 XMLdata Ltd

Support

Submit a support request using the Support Page

1. Go to Support page by clicking on "Support" on the navigation bar
2. Fill out the form
3. Click "Send"

Submit a support request via email

- Send your support request to support@xmldation.com

Contact your administrator

- Contact the administrator who notified you about your XMLdation account

The screenshot shows the XMLdation Support page. The navigation bar at the top includes 'VALIDATION', 'REPORTS', 'SIMULATION', 'WIKI', 'PREFERENCES', 'SUPPORT', and 'LOGOUT'. The 'SUPPORT' link is circled in red, with a yellow box containing the number '1.' and an arrow pointing to it. The page title is 'Support' with a link to 'User guide'. Below the title, there is a message: 'Please check our Wiki for answers before submitting your question.' The form fields are: 'Recipient:' (support@xmldation.com), 'Type:' (radio buttons for 'Request' and 'Incident'), 'Subject:' (text input), 'Report id:' (text input), '*Email:' (BankClientUser1@demo_bank_client), and '*Description:' (text area). A yellow box with the number '2.' is next to the form fields. Below the form, there is a 'Send' button circled in red, with a yellow box containing the number '3.' and an arrow pointing to it. At the bottom right, there are links for 'User guide', 'Terms of use', and '© 2020 XMLdation Ltd'.

Support FAQ

What browsers are supported?

- Chrome
- Firefox
- Edge
- Safari
- Internet Explorer 11 (only this version)

I am having problems signing in.

See the “Signing FAQ” on page 5 of this guide.

Contact support or your administrator.

Administration – managing users

A user must have Admin rights to access Administration functions

Viewing and editing users

- 1 Click on “Admin Tools” and select “Users”**
The page will show the list of active and expired users

- 2 Three ways to find a user**

- 2.1** Type a username, or part of a username, in the search box. The list automatically updates to show users whose username matches your text

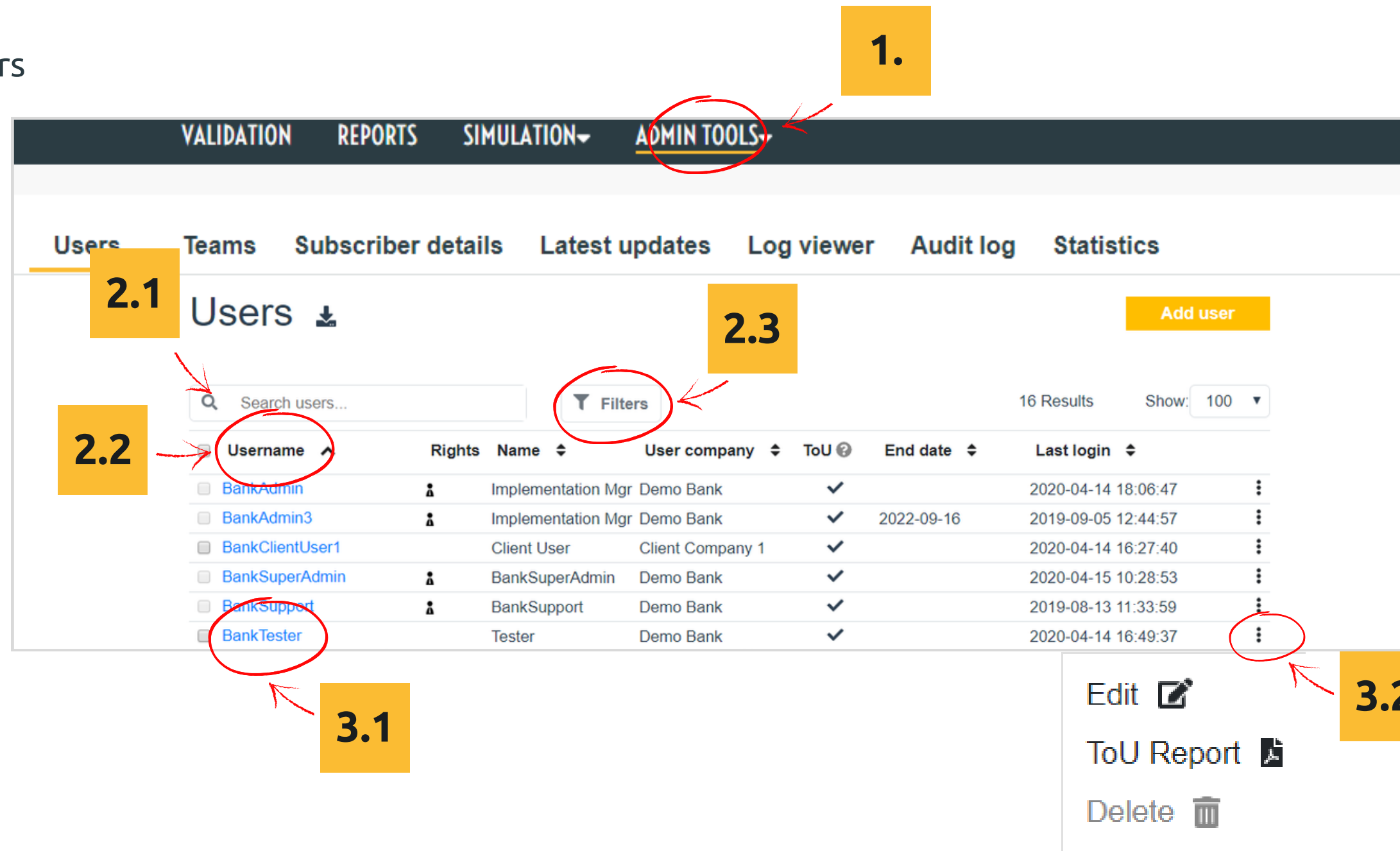
- 2.2** Sort the users by clicking on column headings. You can sort by Username, Name, User company, End date and Last Login

- 2.3** Filter the list. You can filter based on Username, Name, Company name, Email, User rights, and User status

- 3 Two ways to view or edit user details**

- 3.1** Click on the “Username”

- 3.2** Click on  with the left mouse button and select Edit




The screenshot shows the 'Admin Tools' section of a web application. The 'ADMIN TOOLS' menu item is circled in red and labeled '1.'. Below it, the 'Users' tab is selected, and the 'Users' page title is circled in red and labeled '2.1'. A search box labeled 'Search users...' is circled in red and labeled '2.1'. A 'Filters' button is circled in red and labeled '2.3'. The 'Username' column header is circled in red and labeled '2.2'. The 'BankTester' user entry is circled in red and labeled '3.1'. A three-dot menu icon next to the 'BankTester' entry is circled in red and labeled '3.2'. The menu options are 'Edit', 'ToU Report', and 'Delete'. The table below shows a list of users with columns for Username, Rights, Name, User company, ToU, End date, and Last login.

Username	Rights	Name	User company	ToU	End date	Last login
BankAdmin	Implementation Mgr	Demo Bank		✓		2020-04-14 18:06:47
BankAdmin3	Implementation Mgr	Demo Bank		✓	2022-09-16	2019-09-05 12:44:57
BankClientUser1	Client User	Client Company 1		✓		2020-04-14 16:27:40
BankSuperAdmin	BankSuperAdmin	Demo Bank		✓		2020-04-15 10:28:53
BankSupport	BankSupport	Demo Bank		✓		2019-08-13 11:33:59
BankTester	Tester	Demo Bank		✓		2020-04-14 16:49:37

Adding a user

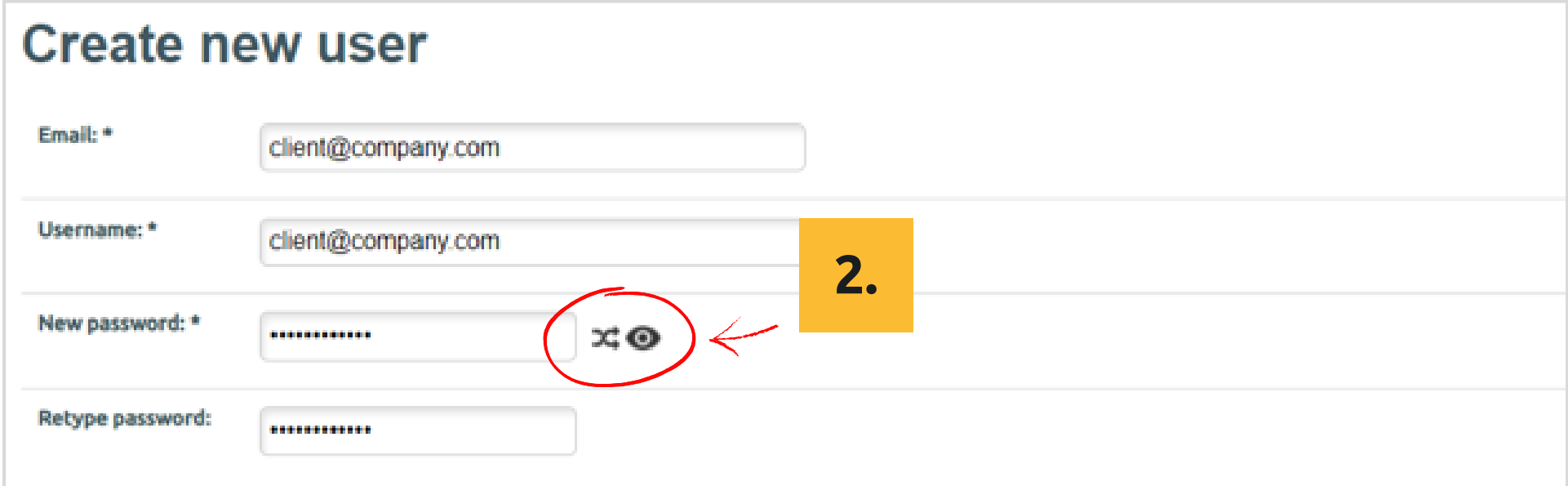
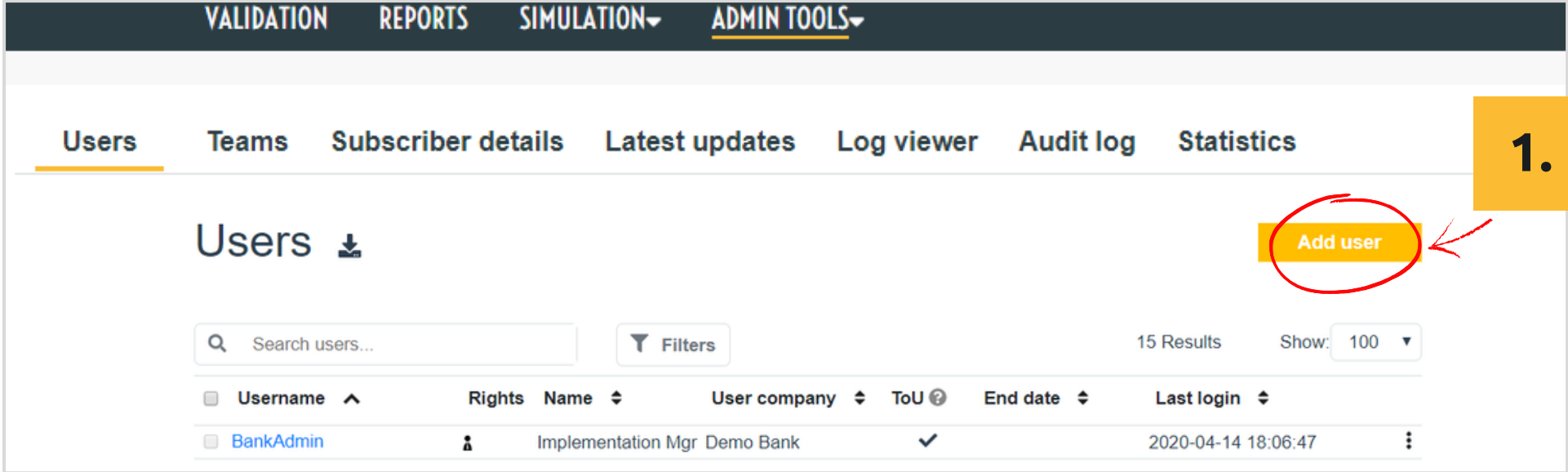
1 Click on “Add User”

2 Enter user details on the Create new user page
You must enter Email, Username, and password for the user.

You can generate a password by clicking the  icon. Configure settings for the user if needed. Reference “Useful settings” in this guide.

3 Click “Save” at the end of the Page
Scroll to the end of the Page to find the “Save” button.


4 Email user credentials to user
Click on the link “You can now send email to user”. A template email opens. You can edit the email text. Click “Send”.



Useful settings when adding a user

Field	Comment
User type	<p>By default, users are set up as floating or Guest users. These user accounts automatically expire after a period of time. The period of time can be defined by your organization. Floating and Guest users cannot be assigned Admin rights.</p> <p>Users can also be set up as Named or Subscriber users. If you intend to assign Admin rights to the user, you must add them as a Named or Subscriber user. You cannot assign Admin rights to a user when a user is being added.</p>
Timezone	Set the timezone according to user location.
Personal support email	You can assign an email address for this user's support. If the field is left blank, the default support email chosen by your organization is used.
User validation type permissions, if available	You can choose the Validation Types to publish to the user. If the option is not available, all Validation Types configured for your organization are automatically published.
User simulation scenario permissions, if available	You can choose the Simulation Scenarios to publish to the user. If the option is not available, all Simulation Scenarios configured for your organization are automatically published.


Useful user settings that can be edited

Field	Comment
Password	<p>Users sometimes request an administrator to reset their password. On the User page, click on the  icon to generate a new password. Save the new password and resend the user credentials to the user by clicking the Email to User button.</p> <p>The recommended process is to request the user to use the 'Forgot my Password' option on their Sign In page.</p>
Account end date	<p>If a user's account has expired, you can edit the account end date to be a future date. This will reopen the account.</p>
User validation type permissions, if available	<p>You can select additional Validation Types to publish to a user. If the option is not available, all Validation Types configured for your organization are automatically published..</p>
User simulation scenario permissions, if available	<p>You can select additional Simulation Scenarios to publish to a user. If the option is not available, all Simulation Scenarios configured for your organization are automatically published.</p>
User type / Admin rights	<p>If you have the correct permissions, you may assign and remove Admin rights from Named and Subscriber users.</p>

You can also resend user credentials to a user by clicking the "Email to User" button on the User Edit Page

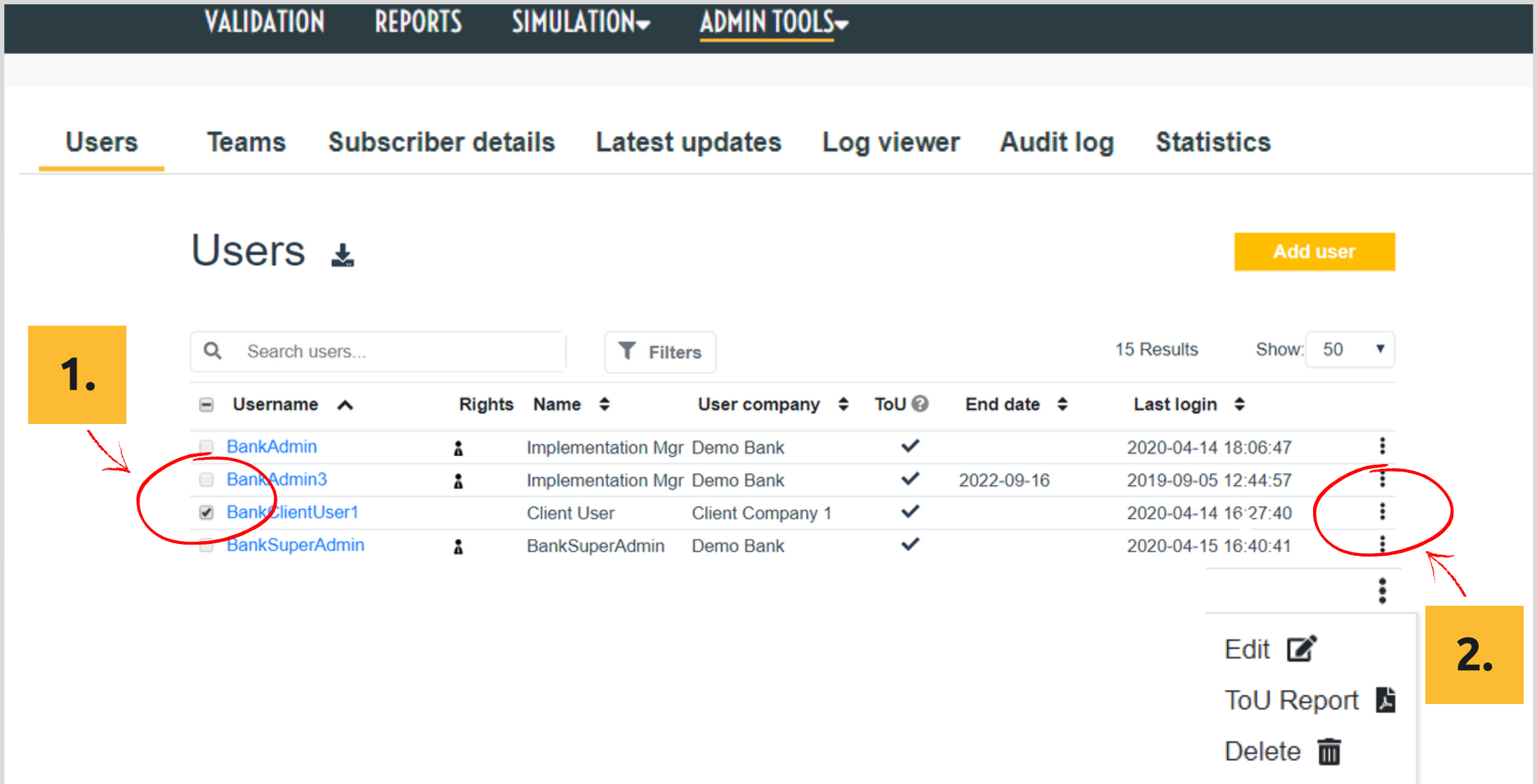
Deleting a user

Two ways to delete a user

1. Select the tick box next to the user to be deleted. Scroll to the bottom of the form and click "Delete". This method is useful if you want to delete multiple users.
2. Click on the  icon with the left mouse button and select "Delete".

I cannot place a tick in the box next to the user, and the delete option is greyed out. Why is that?

The user might be an Admin user. Admin users cannot be deleted. Their Admin rights must be removed before they can be deleted.



The screenshot shows a web application interface for user management. At the top, there are navigation tabs: VALIDATION, REPORTS, SIMULATION, and ADMIN TOOLS. Below this, there are sub-tabs: Users, Teams, Subscriber details, Latest updates, Log viewer, Audit log, and Statistics. The 'Users' tab is active. The main content area is titled 'Users' and includes a search bar, a filters button, and a table of users. The table has columns for Username, Rights, Name, User company, ToU, End date, and Last login. The user 'BankClientUser1' is selected, and a context menu is open over it, showing options: Edit, ToU Report, and Delete. A yellow box with the number '1.' points to the checkbox next to 'BankClientUser1', and another yellow box with the number '2.' points to the 'Delete' option in the context menu.

Username	Rights	Name	User company	ToU	End date	Last login
<input type="checkbox"/> BankAdmin	Implementation Mgr	Implementation Mgr	Demo Bank	✓		2020-04-14 18:06:47
<input type="checkbox"/> BankAdmin3	Implementation Mgr	Implementation Mgr	Demo Bank	✓	2022-09-16	2019-09-05 12:44:57
<input checked="" type="checkbox"/> BankClientUser1	Client User	Client User	Client Company 1	✓		2020-04-14 16:27:40
<input type="checkbox"/> BankSuperAdmin	BankSuperAdmin	BankSuperAdmin	Demo Bank	✓		2020-04-15 16:40:41

Assigning and removing admin rights for a user

- 1 Find the user on the User list and go the Edit User page**
The page will show the list of active and expired users. (See page 28.)
- 2 Find the User type field on the Edit User page**
If you have permissions to assign or remove admin rights, you will be presented with a list of User types and will have an option to select a new User type for the user.
If you do not have permissions to assign or remove Admin rights, only one value for User type will be shown.
- 3 Change the User Type and Save**
If assigning Admin rights, select a User type with Admin rights
If removing Admin rights, select Named or Subscriber User type.

Edit "BankClientUser1" user

Email: *

Username: *

New password:

Retype password:

User type: * **Named** Named User is staff of th
 Company admin

If you need to assign or remove admin rights for a user and you don't have permission, contact Support to request the change to the user's rights.

User Management FAQ

A user account has expired. How do I reactivate it?

1. Go to the Edit User page
2. Enter an Account Expiry Date that is in the future, or make the field blank
3. Save the changes

A user has forgotten their user credentials, including password. What should I do?

- Resend the user their client credentials.
 - a. Go to the Edit User page
 - b. Check that the user's email address is correct
 - c. Click the "Email to user" button at the bottom of the page. Username will be sent, but not the password
 - d. Ask the user to get a new password by clicking the "Forgot my password" link on the Sign in page

One of the users has forgotten their password. What should I do?

We recommend that you ask them to use the "Forgot my password" link on the Sign in page. However, you can also reset the password for them. See section "Useful user settings that can be edited".

I want to review all users in the system. Can I download the full list of users?

Yes. There is a download icon on the Users page. Use this to download a CSV of all users.

How can I check the list of Validation Types and Simulator Scenarios that a user sees?

You can view the list on the Edit User page.

I can't find a user in the User list.

1. Try using the Filter option
2. Check if the user has been deleted. You can view the list of deleted users by selecting the Advanced option "Show deleted users only" in the Filter area

I want to delete a user but I can't select it, and the Delete option is greyed out.

The user may have Admin rights. You cannot delete Admin users. You must first remove their Admin rights. See section "Assigning and removing admin rights for a user".

User Management FAQ 2

The default expiry time for Floating and Guest user accounts is too short. What should I do?

Ask your organization to change the default expiry time.

I don't want to create users manually. Can I set the system up to create users automatically?

Yes. It is possible to share a registration code with users, and the user creation happens automatically when they submit the code. Your organization can request XMLdation to put this feature in place if required. It is a paid-for feature.

What is ToU?

ToU stands for Terms of Use. All users of the Service must accept the Terms of Use before they can use the Service.

Administration – tracking user activity

A user must have Admin rights to access
Administration functions

Tracking User Activity – Users Page

Check if a user who has received credentials has logged in

1. Go to the user list
 - a. Click “Admin Tools”
 - b. Select “Users”
2. Find the user
3. Check the Last login column. If the user has logged in, there will be a value in this column. If they have not logged in yet, the entry in this column will be blank.

Check when a user last logged in

Check the value in the Last login column in the Users page

The screenshot shows a web application interface with a dark navigation bar at the top containing 'VALIDATION', 'REPORTS', 'SIMULATION', and 'ADMIN TOOLS'. A red circle highlights 'ADMIN TOOLS' with a yellow callout box labeled '1a'. Below the navigation bar is a secondary menu with 'Users', 'Teams', 'Subscriber details', 'Latest updates', 'Log viewer', 'Audit log', and 'Statistics'. A red circle highlights 'Users' with a yellow callout box labeled '1b'. The main content area is titled 'Users' and includes a search bar, a 'Filters' button, and a table of users. A yellow callout box labeled '2.' points to the search bar. The table has columns for 'Username', 'Rights', 'Name', 'User company', 'ToU', 'End date', and 'Last login'. A red circle highlights the 'Last login' column header with a yellow callout box labeled '3.'. An 'Add user' button is visible in the top right corner of the table area.

Username	Rights	Name	User company	ToU	End date	Last login
BankAdmin	👤	Implementation Mgr	Demo Bank	✓		2020-04-14 18:06:47
BankAdmin3	👤	Implementation Mgr	Demo Bank	✓	2022-09-16	2019-09-05 12:44:57
BankClientUser1	👤	Client User	Client Company 1	✓		2020-04-14 16:27:40
BankSuperAdmin	👤	BankSuperAdmin	Demo Bank	✓		2020-04-15 16:40:41

Tracking User Activity – Statistics Page

Check the number of validations and simulations that a user has performed in a given period

1. Go to Statistics
 - a. Click “Admin Tools”
 - b. Select “Statistics”
2. Select a date range
3. Select the username

Number of validations and simulations performed are shown

The screenshot displays the 'Statistics' page in a web application. The navigation bar at the top includes 'VALIDATION', 'REPORTS', 'SIMULATION', and 'ADMIN TOOLS'. The 'ADMIN TOOLS' menu is circled in red, with a yellow box labeled '1a' and an arrow pointing to it. Below the navigation bar, there are several menu items: 'Users', 'Teams', 'Subscriber details', 'Latest updates', 'Log viewer', 'Audit log', and 'Statistics'. The 'Statistics' menu item is also circled in red, with a yellow box labeled '1b' and an arrow pointing to it. The main content area is titled 'Statistics' and contains a 'Filters' section. The 'Date range:' filter is circled in red, with a yellow box labeled '2.' and an arrow pointing to it. The 'Username:' filter is also circled in red, with a yellow box labeled '3.' and an arrow pointing to it. Below the filters, there is a 'Summary' section with a dropdown arrow. The summary shows 'Total validations: 11' and 'Total simulations: 3'.

Summary	
Total validations:	11
Total simulations:	3

Tracking User Activity – Audit Log Page

Check what validations and simulations a user has run

1. Go to the Audit log
 - a. Click “Admin Tools”
 - b. Select “Audit log”
2. Use the browser find function (Ctrl + F) to find the entries relating to this use in the log

For **Validations**, the Status field indicates whether the file passed or failed validation.

For **Simulations**, the Status field indicates whether the file uploaded to the simulator was valid and the simulator successfully generated the response files.

Timestamp	Username	Event	Action	Resource	Status
2020-04-14 15:42:04	BankClientUser1	Simulation	Generate	CTX to NACHA Return and Reject	🟢
2020-04-14 15:41:37	BankClientUser1	Simulation	View	Whole Message Accepted	🟢
2020-04-14 15:41:29	BankClientUser1	Simulation	Generate	Pain.001 ACH Credits to pain.002	🟢
2020-04-14 15:34:43	BankClientUser1	Simulation	Generate	Pain.001 ACH Credits to pain.002	🟢
2020-04-14 12:37:33	BankClientUser1	Validation	Validate	ISO 20022 - CGI-MP >> pain.001.001.03 > CGI-MP CT v03 ACH&Wires (General)	🟡
2020-04-14 12:37:17	BankClientUser1	Validation	Validate	ISO 20022 - CGI-MP >> pain.001.001.03 > CGI-MP CT v03 ACH&Wires (General)	🟢
2020-04-10 18:10:05	BankClientUser1	Validation	Validate	ISO 20022 - CGI-MP >> pain.001.001.03 > CGI-MP CT v03 ACH&Wires (General)	🟡
2020-04-10 18:09:36	BankClientUser1	Validation	Validate	ISO 20022 - CGI-MP >> pain.001.001.03 > CGI-MP CT v03 ACH&Wires (General)	🟢
2020-04-10 18:02:52	BankClientUser1	Validation	Validate	NACHA > ACH PPD	🟡
2020-04-02 14:31:56	BankClientUser1	Simulation	View	One Transaction Rejected	🟢
2020-04-02 14:31:41	BankClientUser1	Simulation	View	Whole Message Accepted	🟢

Tracking User Activity – Reports Page

Check if a user who has received credentials has logged in

1. Go to the Reports page
2. Select the Report filtering option
3. Enter the Username. You can use * as a wildcard in this field
4. Click “Filter”

The validation reports that were generated as a result of the users validations are listed.

Note: Your environment may be configured to delete all user validation reports on user logout. In this case the Reports listing will be empty.

1.

2.

3.

4.

	Time	User	File	Validation type	Result	Report id	Action
Apr 14	12:37	BankClientUser1	CGIMPvalidexamplefile.xml	CGI-MP CT v03 ACH&Wires (Ge...	Failed	171812	✘
	12:37	BankClientUser1	CGIMPvalidexamplefile.xml	CGI-MP CT v03 ACH&Wires (Ge...	Passed	171811	✘

Administration – company configuration

Changing subscriber details

Setting up automated notifications

Uploading user guides

Publishing latest updates

Changing company details

You can edit subscriber information such as Name, and settings such as timezone and number of days to leave floating/guest user accounts open.

1. Go to Subscriber Details
 - a. Click "Admin Tools"
 - b. Select "Subscriber Details"
2. Change the subscriber information or settings and click "Save"

I don't see Subscriber Details under Admin Tools

You may not have rights to view Subscriber Details. Contact support or your Administrator if you need access.

I don't see a Save button on Subscriber Details page

You may not have rights to save changes to Subscriber Details. Contact support or your Administrator if you need access.

The screenshot shows the XMLdataion Admin Tools interface. The top navigation bar includes 'ADMIN TOOLS' (circled in red with a yellow callout '1a'), 'REPORTS', and 'SIMULATION'. Below this, the 'Subscriber details' menu item is circled in red with a yellow callout '1b'. The main content area is titled 'Edit subscriber "Demo Bank"'. It features a 'Summary' table with the following data:

Admins:	4
Team admins:	0 / 5 (+ 0 expired)
Subscriber user accounts:	5 (+ 6 expired)
Guest user accounts:	1 (+ 2 expired)
Simultaneous guest sessions:	Unlimited simultaneous sessions allowed
Teams:	1 / 5

Below the summary is the 'General' section with 'Subscriber info' and 'Environment settings'. The 'Subscriber info' fields are:

- Name: Demo Bank
- Street address: [empty]
- City: [empty]
- Postal code: [empty]
- Phone: [empty]

The 'Environment settings' fields are:

- Timezone: UTC
- Default days open: 28 (The default number of days a Guest User's account is open after the first login.)
- Password expiration: 90 (The default number of days that a password can be used before it must be changed.)
- Welcome text: Welcome to XMLdataion demo!

Setting up notifications for floating/Guest user account expiries

Floating and Guest user accounts are set to automatically expire after a default period of time, usually 90 days from first login. However some users may need their account extended.

You can configure the system to automatically email notifications when an account is about to expire, or has expired.

1. Go to Subscriber Details
 - a. Click "Admin Tools"
 - b. Select "Subscriber Details"
 - c. Scroll down to the Notifications section
2. Trigger notifications
 - a. A number of days before a user account expires and/or
 - b. When a user account expires
3. Choose who receives the email notifications
4. Define an email subject
5. Define a template for the email body

I don't see a Notifications section on my Subscriber Details page

You may not have rights to view and alter Notifications. Contact support or your Administrator if you need access to configure Notifications.

1a

1b

ADMIN TOOLS

Subscriber details

2a

3

3.

4.

5.

2b

Notifications:

Send automatic notifications by email

Before floating account expires

Days before expiration: 3
Email notifications are sent this number of days before the user account expires

Send email to user:
Email sent to the user's personal email address

Send email to support:
Email sent to the support email address set up for this user

Send email to:
useraccessadmin@bank.com
Email sent to all additional email addresses specified here. Multiple addresses are separated by comma.

Email subject:
User account %username% is about to expire
Subject for the email to be sent

After floating account expires

Email template:
%username% access to the Service will expire in %numberofdaysuntilexpiry% days on %expirydate%. If you need help, please contact %supportemail%.
You can include %numberofdaysuntilexpiry%, %expirydate%, %username% and %supportemail% in the template text.

Open

Close

Uploading User Guides

User Guides can be uploaded to the Service. You can upload a guide for any language supported in your Service. Logged in users will be shown the guide for their selected language.

1. Go to Subscriber Details
 - a. Click “Admin Tools”
 - b. Select “Subscriber Details”
 - c. Scroll down to the User Guide section
2. Drag and drop, or browse to select, a Guide in pdf format

A link to the User Guide will be shown on the Service Front page, on the bottom right hand of each Service page, and on the Support page.

I don't see a User Guide section on my Subscriber Details page

You may not have rights to upload User Guides. Contact support or your Administrator if you need access to upload or delete User Guides.

The screenshot shows the Admin Tools interface. The top navigation bar includes 'VALIDATION', 'REPORTS', 'SIMULATION', and 'ADMIN TOOLS'. The 'ADMIN TOOLS' menu is circled in red, with a red arrow pointing to a yellow box labeled '1a'. Below this, the 'Subscriber details' tab is selected and circled in red, with a red arrow pointing to a yellow box labeled '1b'. The 'User guides' section is visible, with a yellow box labeled '2.' pointing to the 'English:' label. The 'English:' label is followed by a link to 'XMLdataion Service User Guide.pdf' and a trash icon. Below this, there are three upload boxes for 'Suomi:', 'Francais:', and 'Multilingual:'. Each box contains the text 'Please select a file or drag and drop'. A note at the bottom states: 'Multilingual guide will be shown when there is no guide available on user's language.'

Publishing Latest Updates



You can publish Latest Updates to users of the Service. You can use these to inform users of changes in the Service, for example, if support for a new file type has been added.

1. Go to Latest updates
 - a. "Click Admin Tools"
 - b. Select "Latest updates"
2. Select "Add Update" and add details about your update

Latest Updates are displayed in the top righthand of the Front page.

I don't see a Latest updates under the Admin Tools menu
You may not have rights to publish Latest updates. Contact support or your Administrator if you need access to this feature.

The screenshot shows the Admin Tools menu with the following items: VALIDATION, REPORTS, SIMULATION, ADMIN TOOLS, Users, Company details, Latest updates, Log viewer, Audit log, and Statistics. The 'ADMIN TOOLS' and 'Latest updates' items are circled in red. A yellow box labeled '1a' points to 'ADMIN TOOLS' and a yellow box labeled '1b' points to 'Latest updates'. Below the menu is the 'Update info' section with a table containing one row of update information. A yellow box labeled '2.' points to the 'Add Update' button in the bottom right corner.

Timestamp	Title	Actions
2020-05-12 14:27:23	RTGS Simulator Demo Setup	 

 support@xmldation.com