Ulster Bank
Help for what matters

Protecting your account

Admin Guide

Contents

Introduction

Protecting your account

To make your account more secure, we've made some changes to how you log into Smart Data Online. We'll now email you an authentication code to enter when you log in. That way, we know it's definitely you.

So that you can keep using Smart Data Online, we need you to activate your account.

Got your activation code?

If you've received an email with your activation code, you can activate your account now. To help you get started, we've put together a step-by-step guide that walks you through the process.

We've also included more information about logging in, resetting your password and doing admin duties with Smart Data Online.
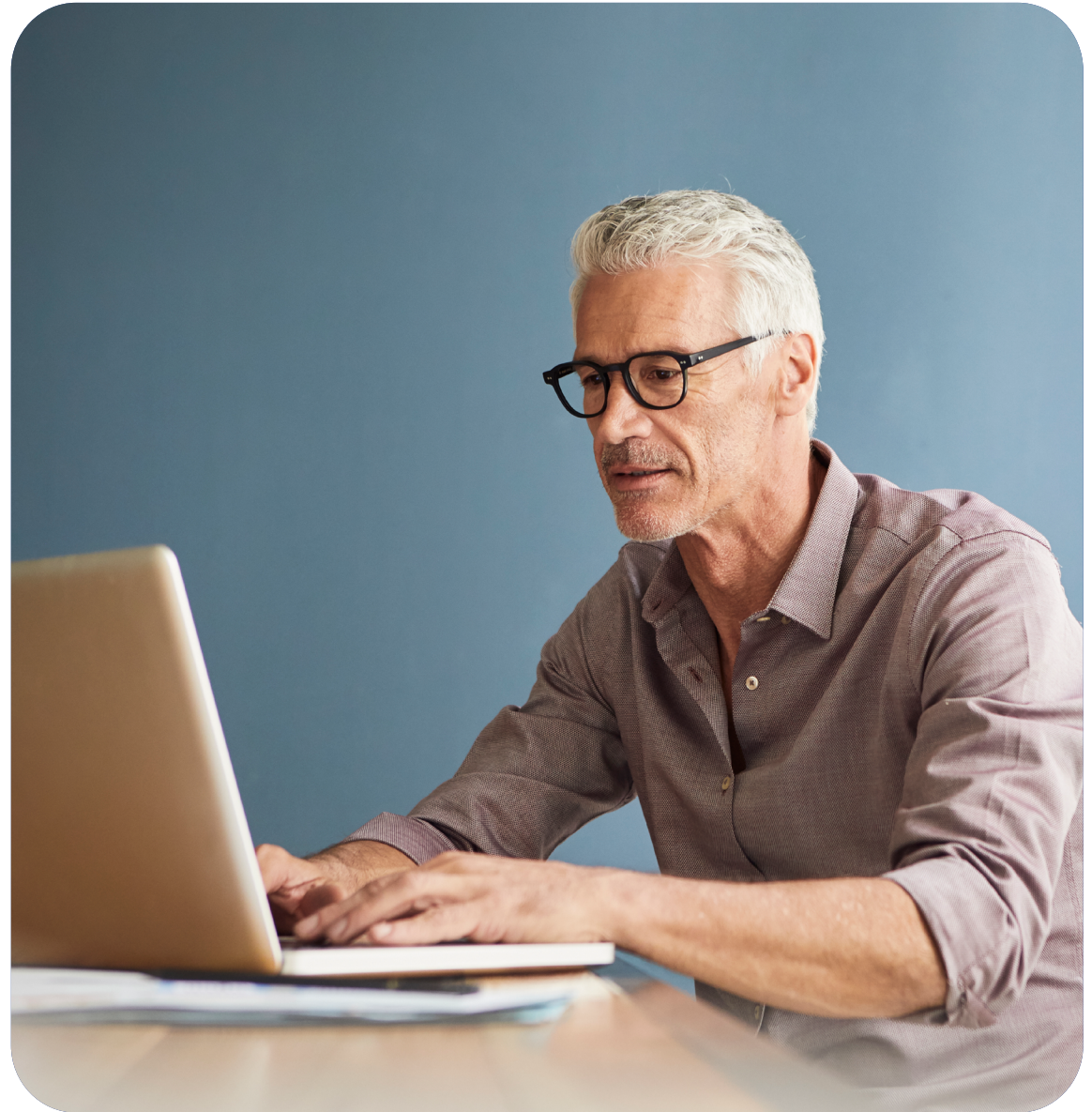
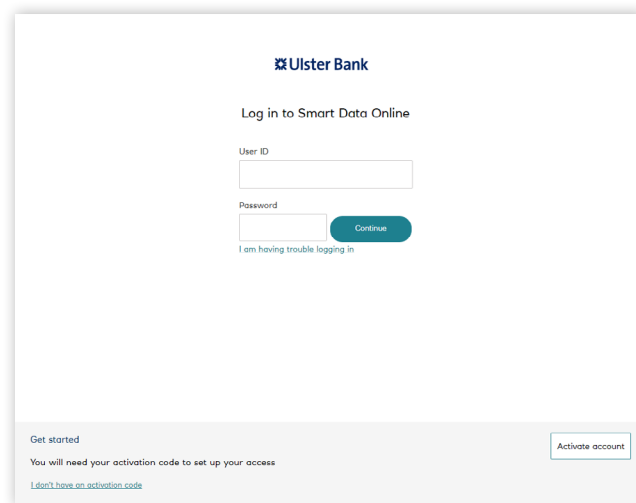# Registration: how to activate your account

Step one

Start by going to the web address on the email we sent you with your activation code.
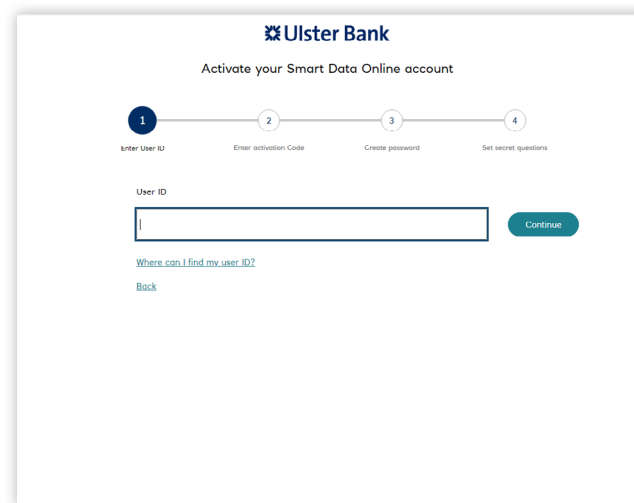
Step two

Click 'Activate account' at the bottom of the page. Enter your User ID and click 'Continue'.
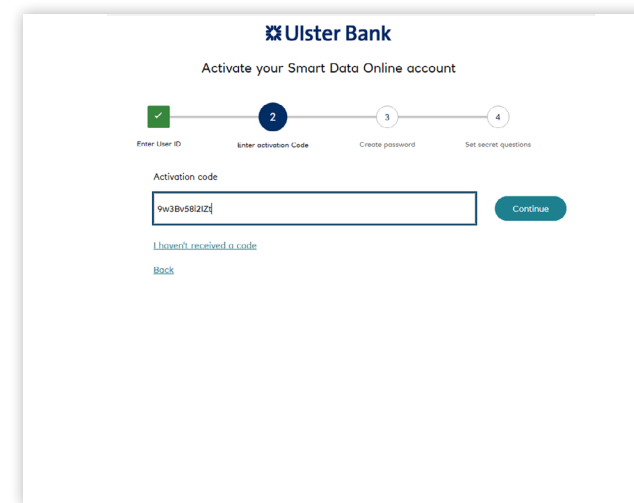
Step three

Enter the activation code we sent you and click 'Continue'.

Step four

If you make a mistake, we'll ask you to check the details you've entered and try again. If you enter your activation code incorrectly multiple times, your account will be locked. To unlock it, you'll need to get in touch with your company admin or our help desk, who will send you a new activation code.

Step five

Once you've entered your activation code correctly, we'll ask you to create a password. Your password must have at least eight characters and three of the following: one upper case character, one lower case character, one numeric character or one special character (!£$%&^-@).

Step six

Make sure your passwords match then click 'Continue'.

Step seven

We'll ask you to set up three secret questions and answers so you can reset your password if you forget it. To keep your account secure, you can't use the same answer for all three questions. Keep your answers safe and remember they are case sensitive.

Step eight

Once you've picked your secret questions and answers, click 'Register'.

Step nine

That's it – you're registered. You'll see a green banner at the top of the SDOL login page that says: 'Your registration has been successful. Please log in.' You can now log into your account using the details you've set up.

| Introduction | Registration | Login journey | Admin users | Password reset | FAQs |

Login journey: how to log in

Step one

Go to the Smart Data Online **login portal**.

Step two

As long as you're registered and your account isn't locked, you can log in by entering your User ID and password and clicking 'Continue'.

Step three

Once you've entered your User ID and password, we'll email you a code to verify it's you. You'll be able to see the last section of the email address we have for you on screen.
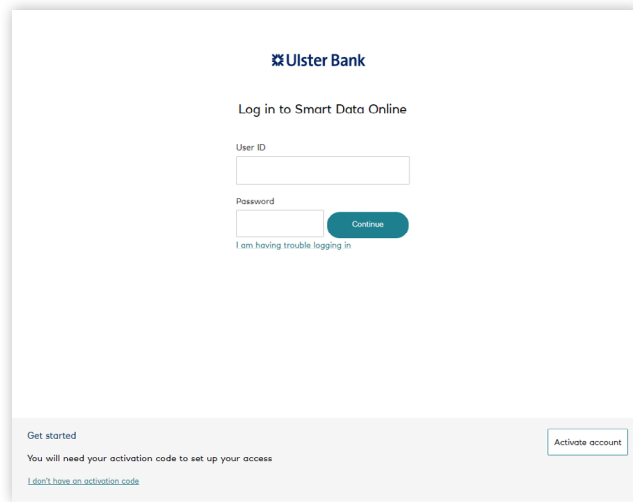
Step four

If you don't get an email from us, you can click 'Resend secure code' after 30 seconds.

Step five

Once you've got the email, enter the code and click 'Log In'.

Step six

If you enter the code incorrectly multiple times your account will be locked and you'll need to get in touch with your company admin or our help desk to unlock it.

Step seven

Admin users

Once you've entered the code correctly, you can go to your Smart Data Online account or complete admin duties. If you need to update a user's contact details or reset their access, we show you how to do that on page 10.

Non-admin users

Once you've entered the code correctly, you'll be able to use your Smart Data Online account.

Not sure what your login details are?

Your User ID was on the email we sent to you with your activation code. If you're not sure what it is, speak to your company admin or our help desk.

You created your password when you activated your account. If you're not sure what it is, you can reset it by clicking 'I am having trouble logging in' underneath the User ID and Password boxes.

How an admin can update user contact details or reset their access

Step one

Go to the Smart Data Online **login portal**. See page 7 for instructions.

Step two

To search for a user, you can select a company and click the 'view all users' link. Or you can select a company and then input a user ID or name.

Step three

Click on the user's name to go to their record. If you need to update their contact details, click 'edit', update the details and then click 'save'. You'll get a green banner to say this was successful.
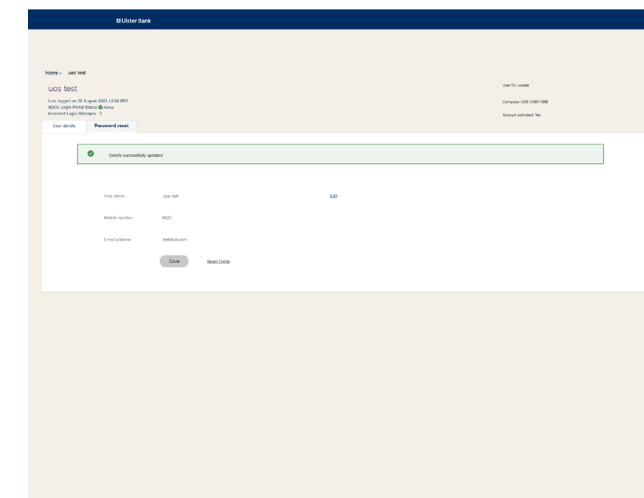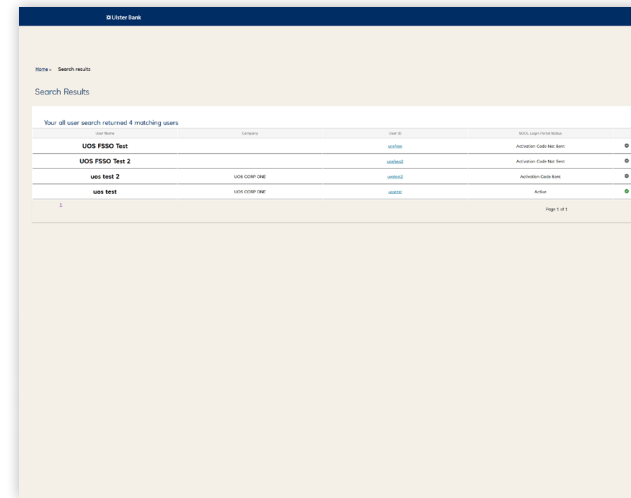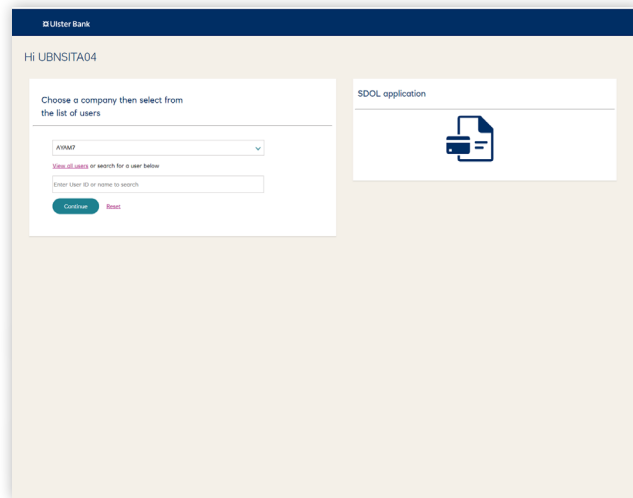
Step four

If you need to help them reset their access, click the 'Password reset' tab at the top. Then click 'Reset password' to send a new activation code to the email address shown above the button.

Step five

A pop-up will ask you to confirm that you want to send a new activation code to the user. Just click 'Yes, reset password' and we'll send out a new activation code. Existing users will receive their code within a few minutes. New users will receive their code any time from 10pm the same day.

Password reset: how to change your password if you know it

Firstly, follow steps 1-6 from pages 7-8, and then follow steps 7-11 below.

Step seven

To go straight through to the SDOL admin portal, click on 'Confirm' and skip to step 11. If you want to change your password, click on the 'Change password' link.

Step eight

Please enter a password meeting the criteria noted.

Step nine

Once you have done this, click on 'Continue'.
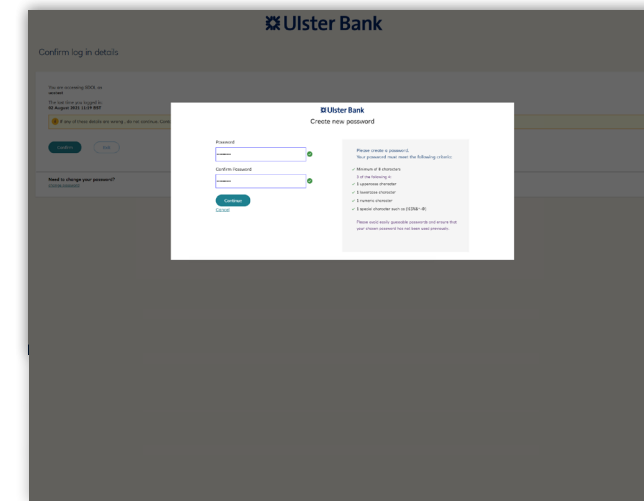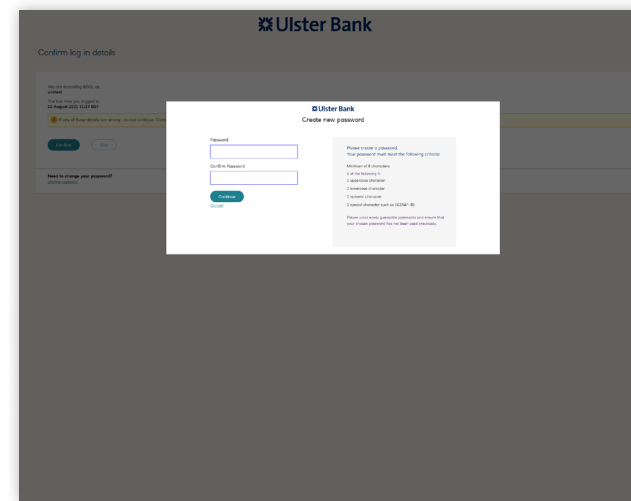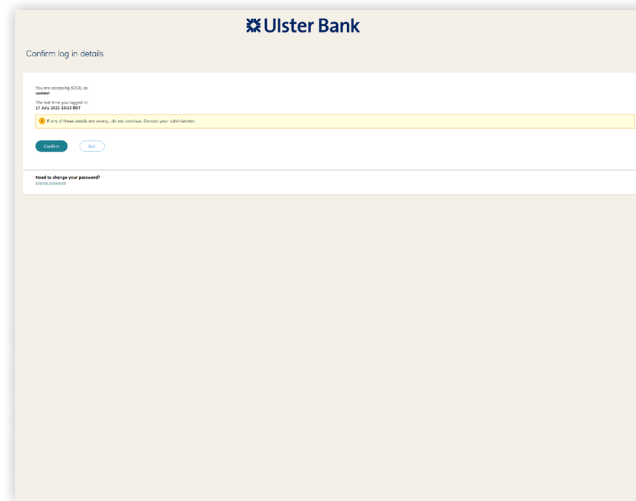
Step ten

A banner will confirm you have successfully changed your password, and you can click 'Confirm' to proceed to the admin portal.
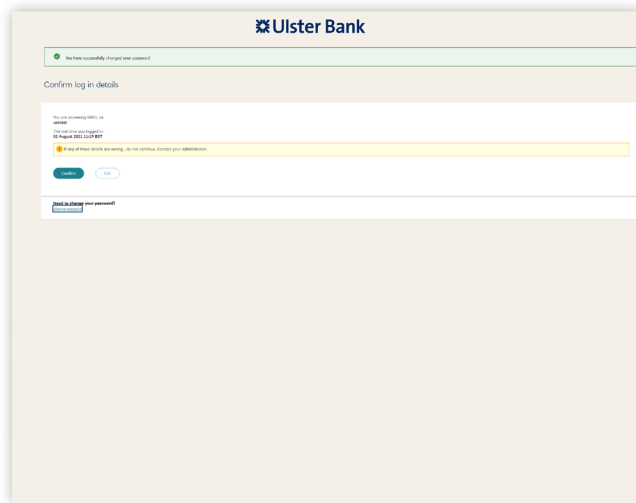
Step eleven

Admin users

Once you've entered the code correctly, you can go to your Smart Data Online account or complete admin duties. If you need to update a user's contact details or reset their access, we show you how to do that on page 10.

Non-admin users

Once you've entered the code correctly, you'll be able to use your Smart Data Online account.

Not sure what your login details are?

Your User ID was on the email we sent to you with your activation code. If you're not sure what it is, speak to your company admin or our help desk.

You created your password when you activated your account. If you're not sure what it is, you can reset it by clicking 'I am having trouble logging in' underneath the User ID and Password boxes.

Password reset: how to reset your password if you've forgotten it

Step one

Go to the Smart Data Online **login portal**.

Step two

Underneath the User ID and Password boxes, click 'I am having trouble logging in'.

Step three

Enter your User ID and click 'Continue'.

Step four

Answer all three security questions and click 'Continue'. Remember they are case sensitive.

Step five

If you make a mistake, we'll ask you to enter your answers again. If you answer incorrectly multiple times your account will be locked and you'll need to get in touch with your company admin or our helpdesk to unlock it. You'll be sent a new activation code and will need to follow the activation process on page 4.

Step six

Once you've answered correctly, you'll be able to set up a new password.

Your password must have at least eight characters and three of the following: one upper case character, one lower case character, one numeric character and one special character (!£$%&^-@). Please avoid easily guessable passwords and ensure that your chosen password has not been used previously.

Step seven

Make sure your passwords match, then click 'Confirm'.

Step eight

That's it – your new password is set up. You'll see a green banner at the top of the login page that says: 'Your password has been created. Please log in.'

FAQs

Why do we need a One-Time Passcode to log in?

When it comes to making transactions online or with an app, security is key. Using One-Time Passcodes allows us to keep you safe and is in line with the Payment Services Directive (PSD2).

I've been shown a blocked out message, what do I do now?

This can happen when details have been entered incorrectly too many times and, for security reasons, we need you to reactivate your access. Please contact your company administrator who will be able to send you a new activation code. When you receive this, you will need to complete the activation process which can be found on page 4.

I can't remember my password. What should I do?

Don't worry, you can answer the secret questions that you set up during activation to reset it. How to do this can be found on page 6. If you can't remember these, you'll need to ask your company administrator to send you out a new activation code so you can reactive your access. When you have your code, you can follow the process on page 4.

I can still get to the old log in website, why is this?

This is a Mastercard-hosted website and some of their other customers need to log in this way. Make sure you update any of your saved URLs to the new one we sent you in your activation email.

I used to be able to use a mobile version of Smart Data Online, where has this gone?

For security reasons, we have had to remove this service. Don't worry, you can still access Smart Data Online via your mobile, it will just look like the online version.

I'm entering my activation code correctly, but I'm getting an error message. Why?

Activation codes are only valid for a certain length of time from when it was sent you to. Check the email you were sent and if it's gone past the expiry, you'll need to contact your company administrator to send you a new code. When you receive this, you will need to complete the activation process which can be found on page 4. If you're a company administrator and need a new activation code, please contact the Smart Data Helpdesk.

How can I update my contact details?

Log into Smart Data Online and you can amend your email there. This can take up to 24 hours to update. If you need an immediate update, you can ask your company administrator to do this for you in the log in portal. They can search for you in the admin screens and update your details. How to do this can be found on page 10.

I've got a sever error message, what does this mean?

This means that we've lost connection with you somehow, we're really sorry. If you close your browser and navigate to the log in portal, you shouldn't face this issue again. If you do, try deleting your cookies and loading the log in portal page again. If you're still experiencing this error, contact your company administrator who can give us a call so we can investigate.

I'm putting in the right secret answers to reset my password, but I'm getting a try again error. Why?

Remember these answers are case sensitive as they're like a password. Make sure you're entering them exactly as you set them up. If you block yourself out, don't worry. Contact your company administrator who will send you out a new activation code so you can reactivate your access. When you receive this, you will need to complete the activation process which can be found on page 4.

How do I know if I'm an admin?

You will have admin access in the log in portal if you're a Company Programme Administrator or a Company Group Administrator. When you log in, you will be shown the admin screens straight away but if you don't want to do any admin duties just click the SDOL application logo and we'll send you over to the main Smart Data Online pages straight away.

How do I create a new user?

If you're a company administrator, log into Smart Data Online and create the new user. This will send an instruction to the log in portal the next working day and automatically send them out an activation code. When they've received this, they'll need to complete the activation process which can be found on page 4. Give them a nudge as the activation code is only valid for a short time.

How do I delete an existing user?

If you're a company administrator, log into Smart Data Online and delete the user. This will prevent them from successfully landing in Smart Data Online. An instruction will be sent to the log in portal the next working day to remove them from there. You can check that this has happened by searching for the user in the log in portal admin pages and you will either see them at deleted status or won't see them at all.

What do the status' mean?

- Active = This means the user has successfully activated their account.
- New User = Activation Code Not Sent = We've created their record in the log in portal, but we'll need to manually send them an activation code. Check their contact details are correct and send out a new activation code. You can find information on this on page 10.
- Activation Code Sent = Activation code has been sent but they haven't used it to activate their access yet.
- Password Locked = They've entered their details incorrectly too many times at log in and will need a new activation code to be sent. How to do this can be found on page 10.
- Activation Code Locked = They've entered their details incorrectly too many times at activation code and will need a new activation code to be sent. How to do this can be found on page 10.
- User Deleted = User is deleted.

What does the 'incorrect log in attempts' mean?

This shows you how many times a user has attempted to enter their activation code, log in or enter their secret answers and questions incorrectly. It resets after a successful log in.

Why hasn't an activation code been sent automatically?

It could be that we don't have all the user's contact details. Check their details on the admin pages of the log in portal. Update if needed and then send them out a new activation code. How to do this can be found on page 10.

I can't see one of my users in the log in portal admin screens. What do I do?

It could be that they are inactive in Smart Data Online which means we haven't created a record in the log in portal for them. As a company administrator, log in and check the user in Smart Data Online and – if needed – activate their access. They should appear in the log in portal admin screens after 24 hours and an activation code should be generated automatically if we have all their details. If you're still having issues, give the Smart Data Helpdesk a call so we can investigate.

I used to be able to use cardholder self-registration, where has this gone?

To make sure that we are keeping you safe online and in line with the Payment Services Directive (PSD2), we've had to remove this functionality. Going forward, you'll have to create a new user in Smart Data Online for every new card you open. This will then send an instruction to the log in portal the next working day and automatically send them out an activation code. When they've received this, they'll need to complete the activation process which can be found on page 4. Give them a nudge as the activation code is only valid for a short time.

I have Company Programme Admin (CPA) users with read-only access in SDOL, will these be impacted?

Yes, all users will need to start using the new log in portal to access SDOL. If you have CPA with a read-only or bespoke user template, then following the move to the new log in portal, these users will have the ability to maintain other users within your organisation (i.e. unlock user details, request a password reset). All other privileges and functionality driven by the user template will remain in place.

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Thank you