

SYSTEM ADMINISTRATOR GUIDE FOR HOMEBANKING OF PPF banka a.s.

Creating new profiles and new Users



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1. Introduction

To create a new profile and to set up a new User it is necessary to be **logged into** Gemini Client Station ("GCS") as the System Administrator.

!!! CAUTION !!!

Following GCS installation, in the first place create an administrator profile and set up the System Administrator as a User!

2. Creating a new User profile

Do not set up a new profile unless you want to assign different rights to the new User than those set up in the already created profiles.

Select System / Access Profile Management... from the menu.



An overview of already created profiles is opened. Click the **New Profile** icon.



The **Profile properties** window opens. Fill in each of the fields as follows:

Field	Description
Profile name	Type the profile name here – we recommend using the first name and surname of the User for whom the profile is being set up. If the profile is to be shared by several Users you can specify the main characteristics of the profile (e.g., profile without payment cards) as the Profile name.
Description	You can specify the profile in more detail here – e.g., administrator rights, a profile without a functionality, etc.
Add new accounts	By ticking this option, newly created accounts will be automatically added to this profile without any need of manual intervention by the System Administrator.
Master profile	Tick this box only if it is the Administrator's Profile.
Active	This option lets you choose whether or not the profile will be active. If the box is not ticked (inactive profile) the profile cannot be assigned to any User (e.g., no User is using this profile at the moment but you wish to save the configuration for possible future use).





Field	Description
Ignore rights for this profile	If you select this option no settings in the lists of rights will have an impact on the system.

Profile propertie	s
Profile name:	User
Description:	user
Add new acc Master profile Active Ignore rights	ounts for this profile
	OK Cancel

Click the new profile line and select PPF banka a.s. in the **Bank** field. In the **Rights** section, configure the required options by ticking boxes in the respective columns; this can be done at the same time at the level of a rights group (Private bank information, etc.) or for each type of rights (BALANCE Account balance, etc.) or only for individual accounts. The meaning of the column designation is as follows: V - the right to view, E - the right to edit, C - the right to create records, I - the right to import, D - the right to delete records, T - the right to take over the ownership of a document created by a different User (i.e. the User will assume all the rights to and also the responsibility for the created document), O - the right to view documents managed by other Users, S - the right to authorise the cancellation of a transaction, c - the right to create new batch items (this right is included in the right to edit), d - the right to delete batch items (this right is included in the right to edit).

G Gemini Client Station - [Access rights profile - Pilot]										
Bank View Bank Products Document Record System Window Help	_	_	_	_	_	_	_	_		
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Bank name: PMBA										
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ACCOUNTS Table of own accounts	$\mathbf{\mathbf{\nabla}}$				\checkmark					
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Payment Orders										
DPO Domestic Bulk Orders										7
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Then close the window by clicking the **X** and confirm saving the changes by pressing the **Yes** button.

3. Inserting new Users

To provide independent access by each of the Users to the application and the possibility for each of them to authorise Payment Orders to the Bank, insert each User into the GCS individually. Select **System / Users Management...** from the menu.

G Gemini Client Station	
Bank View Bank Products Document Record	System Window Help
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	Toolbars
	Save Environment
	Clear Environment
	Environment Management
	Application Options
	Bank Options
	Access Profile Management
	Users Management
	Bank Management
	Security Management

Click the New user icon.

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User ID	User name
1	Default user
2	liří Správce

The **User properties** window opens. Fill in each of the fields as follows:

Field	Description
User name	Enter the User name.
Login name	Type a name of your choice – it will serve the User for logging into the application.
Profile name	Select one of the Profiles you have preset.
Allowed authentica	tion methods
At least one option n into the GCS the Use	nust be ticked. Nevertheless, all three options can be selected – when logging er then chooses one of the login methods.
Static Password	The User will log in using his Login name and password.
User's system name	This login option consists of the application verifying that the User's login name in Windows and the User's login name in the application match.
Digital Signature	After logging in, the User will use a Signing Certificate.
Default password	Keep the set default password as the password for the User's first login and press the Set button. After the User logs in for the first time using the default password he will be prompted to set up his own password.



Field	Description
Validity [days]:	Set to 0; the validity of the User's own password newly set up will not be limited in time.

User properties		X
user name. John Black		
Login to system Profile: User (user	User's system name Validiti Set	Digital Signature s]: Cumul. errors: 0 Reset
Status of security and bank registration: Bank Name	Re First name	Last name Key Cer
Register Unregister	User's signing certificate Generation Request Renewal Request	Show Registration Request
Creare Import	Nenewal Nequest	

Complete the insertion of the User by clicking the Create button.

Should the User hold the right to authorise for the authorisation of Payment Orders to the Bank, in the **Status of security and bank registration** section click the line **PPF banka a.s.** (the line will be highlighted blue), press the **Register...** button and select the User registered in the Bank by clicking his name. Confirm by the **OK** button.

<u> </u>		X
User name:		Login name:
John Black		black02
Login to system		
Profile:	User (user)	•
- Allowed authentication metho	de	
Static Password	User's system name	Digital Signature
Pageword Varification		
Default password	Vali	dity [days]: Cumul errors:
password	Set 0	0 Reset
Bank Name	Re First name	Last name Key Cert
PPE banka a e	JOHN	BLACK NO
TTT Dalika a.s.		
Register Unrea	III ister User's signing certifi	cate
Register	ister User's signing certifi	cate
Register Unreg	ister User's signing certifi Generation Re	cate Show aquest Registration Request
Register Unreg Local signature keys Create Impo	III Jister User's signing certifi Generation Re Renewal Rec	cate Show Registration Request uest Revocation Request
Register Unreg Local signature keys Create Impo	tt User's signing certifi Generation Re Renewal Rec	iquest Registration Request



Advise the new User of his GCS login data (the data in the **Login name** and **Default password** fields). Help the User to create a request for his Signing certificate – the manual is posted at www.ppfbanka.cz, Documents and important information, Handbooks and manuals for the Homebanking).