



Central Depository Company of Pakistan

USER MANUAL for PARTICIPANTS

Web & IVR Activation

Table of Contents

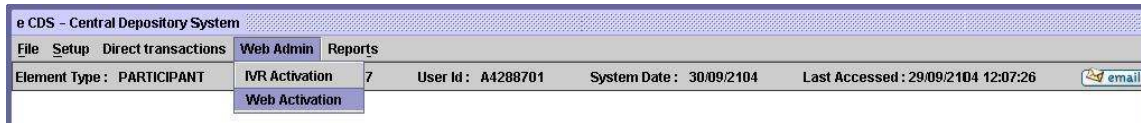
1.	DEFINITIONS, ACRONYMS, AND ABBREVIATIONS	3
2.	WEB ADMIN MODULE	4
3.	WEB ACTIVATION FUNCTIONALITY; ‘POST BROWSER’	5
3.1	ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:	7
3.1.1	‘SEARCH’ (SEARCH PANEL)	7
3.1.2	‘REFRESH’ (SEARCH PANEL)	8
3.1.3	‘GENERATE PASSWORD’	8
3.1.4	‘RESET SECRET KEY ATTEMPTS’	9
3.1.5	‘RESET PASSWORDS ATTEMPTS’	10
3.1.6	‘BLOCK’	10
3.1.7	‘ACTIVATE’	11
3.1.8	‘CANCEL’	11
4.	WEB ACTIVATION FUNCTIONALITY; ‘SAVE BROWSER’	12
4.1	ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:	14
4.1.1	‘SEARCH’ (SEARCH PANEL)	14
4.1.2	‘REFRESH’ (SEARCH PANEL)	14
4.1.3	‘POST’	14
4.1.4	‘DELETE’	15
4.1.5	‘CANCEL’	15
5.	‘WEB ACTIVATION POST DOWNLOAD REPORT’	16
5.1.1	‘CANCEL’	18
6.	IVR ACTIVATION FUNCTIONALITY; ‘POST BROWSER’	19
6.1	ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:	21
6.1.1	‘SEARCH’ (SEARCH PANEL)	21
6.1.2	‘REFRESH’ (SEARCH PANEL)	21
6.1.3	‘ACTIVE’	21
6.1.4	‘RESET RETRIES’	22
6.1.5	‘CANCEL’	23
7.	IVR ACTIVATION FUNCTIONALITY; ‘SAVE BROWSER’	24
7.1	ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:	26
7.1.1	‘SEARCH’ (SEARCH PANEL)	26
7.1.2	‘REFRESH’ (SEARCH PANEL)	26
7.1.3	‘POST’	26
7.1.4	‘DELETE’	27
7.1.5	‘CANCEL’	27
8.	‘IVR ACTIVATION POST DOWNLOAD REPORT’	28
9.	CDC E-SERVICES(S) ACTIVATION/DEACTIVATION STATUS REPORT	31

1. DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Term	Explanation
CDS	Central Depository System
IVR	Interactive Voice Response
DTS	Data Transmission System

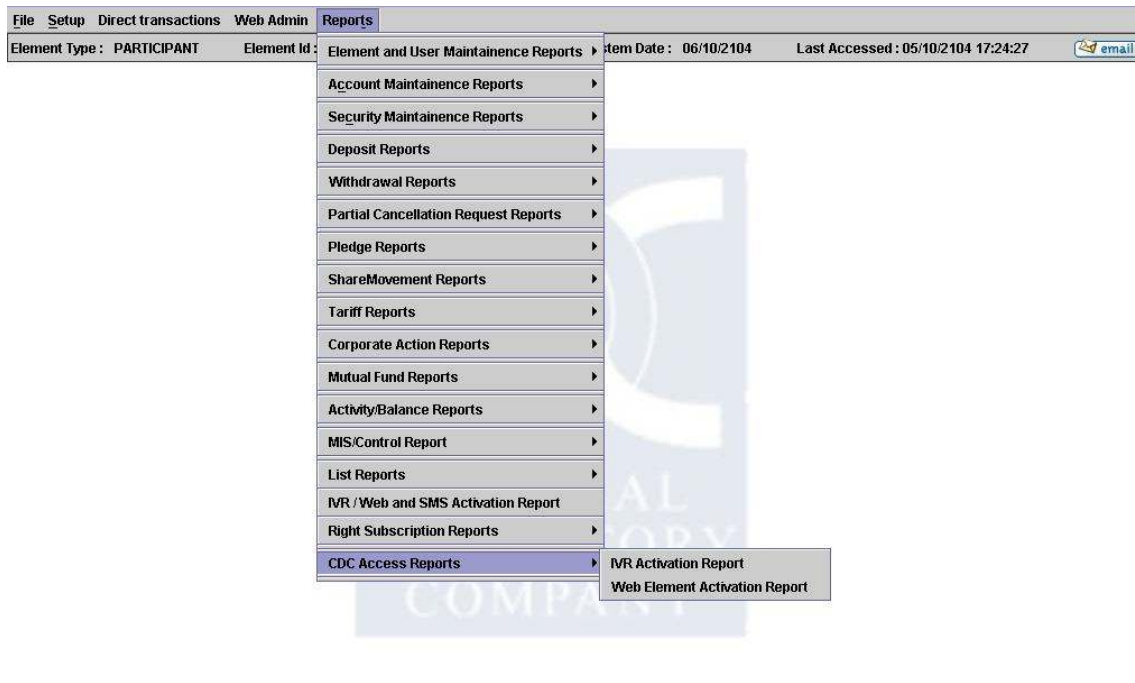
2. WEB ADMIN MODULE

1. The Web Admin module at 'Participant' end provides a set of interfaces for managing and maintaining participant's House, Main and sub-accounts accounts for Web and IVR services, which includes 'Service Activation/Blocking', 'Password Generation', etc.
2. The 'Web Activation' & 'IVR Activation' screens are accessible from the menu named '**Web Admin**' on the main screen.



Web Admin Menu

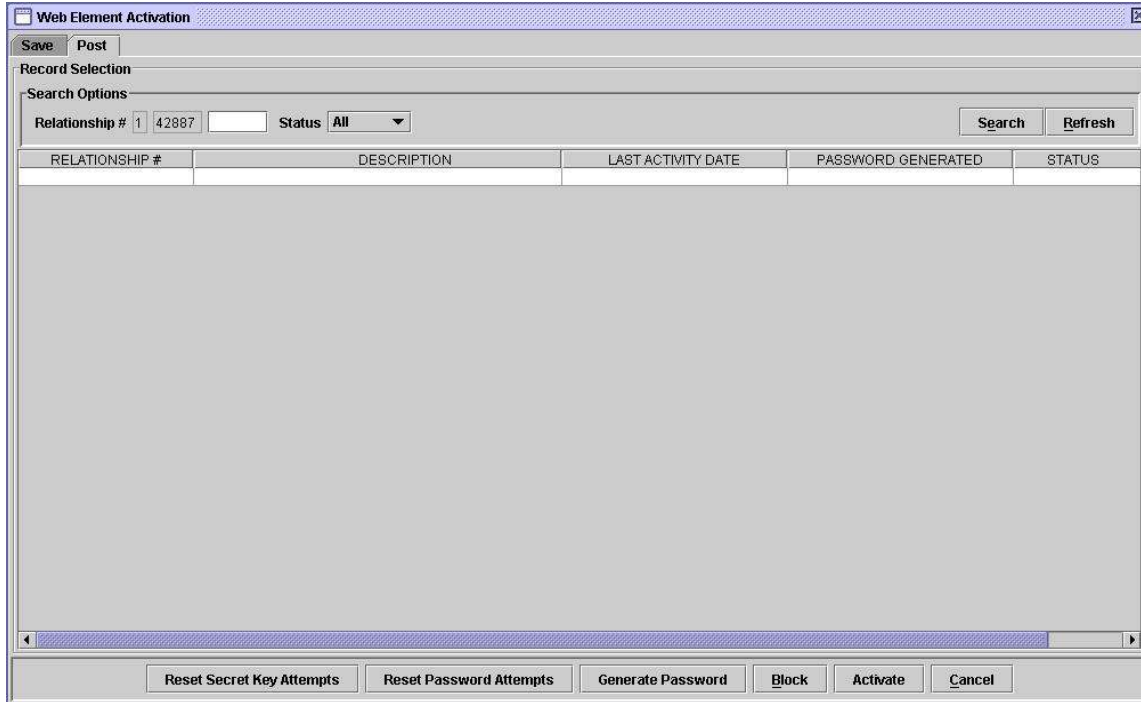
3. Downloads for 'Web Element Activation' and 'IVR Activations' are accessible from 'CDC Access Reports' sub menu under the 'Reports' menu.



CDC Access Reports - Menu

3. WEB ACTIVATION FUNCTIONALITY; 'POST BROWSER'

The 'Web Activation' Post browser provides the initiation interface for relationship entities after the data growth process. From the 'Post' browser the admin user shall initiate Generate Password, Block, Activate and Resetting of Secret key and Resetting of Password operations.



Web Element Activation; Post Browser – Participant Admin end

1. On accessing the 'Post' tab of the 'Web Element Activation', system shall display blank data grid.
2. The 'Post' browser comprises of two panels namely, 'Search Options' and 'Data grid' along with following Web Activation related functional buttons:
 - a) Reset Secret Key Attempts
 - b) Reset Passwords Attempts
 - c) Generate Passwords
 - d) Block
 - e) Activate
 - f) Cancel

Search Fields:

- Relationship #:**
- a) 1st field shall appear in disable mode with auto-populated value of '1'
 - b) 2nd field shall appear in disabled mode with auto-populated value of five digit participant's id.
 - c) 3rd field shall appear in enabled mode for entering the account

number.

Status:

- a) **All** – Default
- b) **Locked** – Initial status of every new 'Relationship #' entry.
- c) **Active** – On the first instance of Web Activation, the status shall change from 'Locked' to 'Active' after the client (sub-account holder) successfully changes the system generated password with a new one through Forced Password screen on the CDCaccess.com site.
- d) **Blocked** – Accounts with 'Active' status could be marked as 'Blocked' by Admin user.

General Information:

- 3. The Post browser's data grid shall display only one record at a time.
- 4. Single Action operation shall be allowed on records i.e. in case, the admin user attempts to executes another action for a Relationship # for which there already exists an entry in the save browser, system shall prompt a message:



- 5. Standard 'Information' message shall appear on affirming a confirmation message:
Sample message on confirmation:

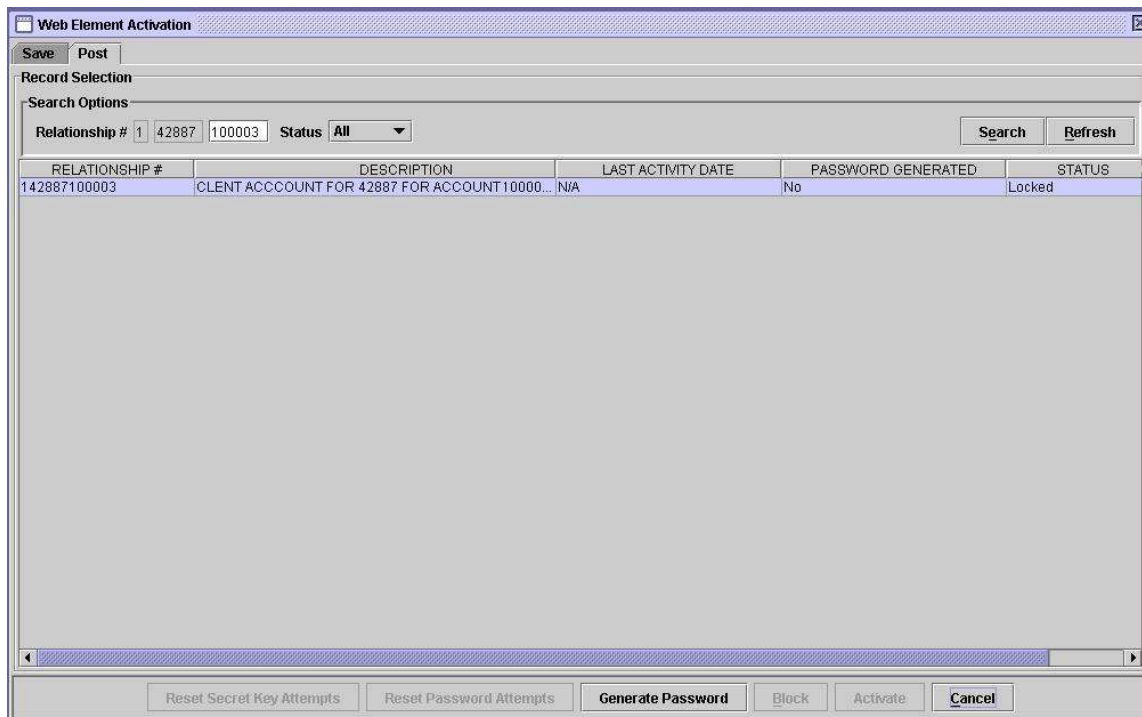


3.1 ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:

3.1.1 'SEARCH' (SEARCH PANEL)

- i. The participant searches record for a specific Sub-Account by entering the 'Account Number' in the 3rd field of the 'Relationship #'.
 - a) User may also opt for a specific 'status' search through 'Status' combo.
- ii. If less than 6 numbers are entered in the 3rd field of Relationship # then system shall insert zero(s) before the entered number to make the total digit count equal to 6.
- iii. If 'Search' is executed without any value in the 3rd field of the relationship # then 'Data grid' shall remain blank. Same shall be the case for invalid account number entry. No message shall be prompted in this case.
- iv. On the first instance of subscription, the record in the post data grid shall display values in:

Column	Value
Relationship #	12 digit number
Description	Account description
Last Activity Date	N/A
Password Generated	No
Status	Locked



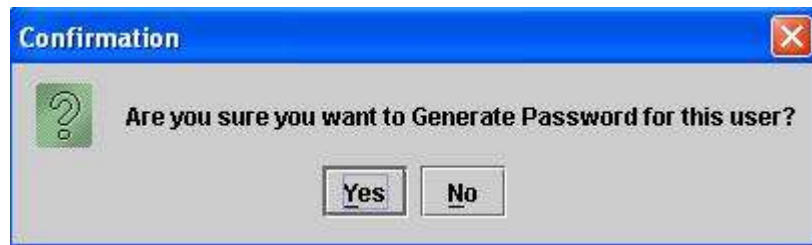
Web Element Activation; Post Browser with Searched Record

3.1.2 'REFRESH' (SEARCH PANEL)

- i. Clicking the 'Refresh' button resets the 3rd field of the 'Relationship #', and the 'Data grid' to the default blank state. The 'Status' combo also reverts to default 'All' selection.

3.1.3 'GENERATE PASSWORD'

- i. For new web subscription relationship entry (for which the password is not yet generated and the status is 'Locked') only following buttons are enabled:
 - a) Generate Password
 - b) Cancel
- ii. The participant administrator clicks the 'Generate Password' button for the selected record on the 'Post' browser.
- iii. System prompts the following message:



- iv. On affirmation on the above message, system creates a corresponding entry in the 'Save' browser with 'Password to be Generated' status.

Note A:

On posting of the entry in the save browser:

- ***System shall generate the Password.***
- ***Password mail shall be sent to sub-account holder's email address.***
- ***The post screen shall show the value of 'Password Generated' column as 'Yes'.***
- ***The 'Last Activity Date' column shall display Date & Time' (e.g. 7/10/2011 17:34:23).***
- ***The status shall change from 'Locked' to 'Active' after the sub-account holders (client) successfully changes the system generated password with a new one through Forced Password screen on CDCaccess.com site.***

Information points on Password Generation:

- v. Once a Password is generated then the value of the 'Password Generated' column shall always remain 'Yes' for the Relationship number.
- vi. If the Password of an 'Active' relationship is again generated through 'Password Generate' button then system shall change the status of the record from 'Active' to 'Locked'.

- vii. The sub-account holder in this situation shall use the new password and then go through the verification and change password pages on CDCAccess.com before accessing the 1st page after login. After the client user successfully generated a new password through 'Change password' screen the status shall change from 'Locked' to 'Active'
- viii. On every instance of 'Generate Password', system shall generate an email with a new password for the Sub-Account client.
- ix. The '*Generate Password*' button shall become 'Disabled', if '*Reset Secret Key Attempts*' or '*Reset Password Attempts*' button is enabled due to exhaustion of 'Secret key' or 'Password' or 'Reset Password Attempts' respectively.
- x. After DTS execution, on searching a relationship record, the entry shall get populated on the web activation's 'data grid even if data growth is not performed for that particular record. Attempt to 'Generate Password' for a record from the data grid for which data growth is not yet performed shall prompt the following message:



3.1.4 **'RESET SECRET KEY ATTEMPTS'**

- i. For new web subscriber, the '*Reset Secret Key Attempts*' button appears in disabled.
- ii. In case the sub-account holder surpasses the maximum allowed attempts (3) for entering the Secret Key then the system shall enable the '*Reset Secret Key Attempts*' button on the 'Post' browser.
- iii. With enabled '*Reset Secret Key Attempts*' button:
 - a) '*Generated Password*' button shall become disabled.
 - b) Status remains unchanged.
- iv. On user's request, the administrator shall click the '*Reset Secret Key Attempts*' button for the selected record on the 'Post' browser.
- v. The corresponding entry shall appear in 'Save' browser with 'Secret Key Attempts to be Reset' status.

Note B:

On posting of the entry in the save browser:

- ***System shall reset the secret key attempts.***
- ***Status in the post browser remains unchanged.***
- ***'Reset Secret Key Attempts' button becomes disabled.***
- ***'Generate Password' button becomes enabled.***

3.1.5 **'RESET PASSWORDS ATTEMPTS'**

- i. For new web subscriber, '*Reset Password Attempts*' button appears disabled mode.
- ii. If the sub-account holder surpasses the maximum allowed attempts (8) for entering the Password, the system shall enable the '*Reset Password Attempts*' button for the selected record on the 'Post' browser.
- iii. With enabled '*Reset Password Attempts*' button:
 - a) '*Generated Password*' button shall become disabled.
 - b) Status remains unchanged.
- iv. On user's request, the administrator shall click the '*Reset Password Attempts*' button on the 'Post' browser.
- v. The corresponding entry shall appear in 'Save' browser with 'Password to be Reset' status.

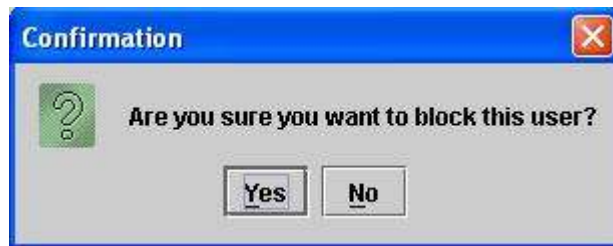
Note C:

On posting of the entry in the save browser:

- ***System shall reset the password attempts.***
- ***Status in the post browser remains unchanged.***
- ***'Reset Password' button becomes disabled.***
- ***'Generate Password' button becomes enabled.***

3.1.6 **'BLOCK'**

- i. '*Block*' button shall only be enabled for records with 'Active' status.
- ii. On clicking the '*Block*' button for the selected record, system shall prompt the following message:



- iii. Standard 'Information' message shall appear on affirming the confirmation message.
- iv. A corresponding entry shall be created in 'Save' browser with 'To be Blocked' status.

Note D:

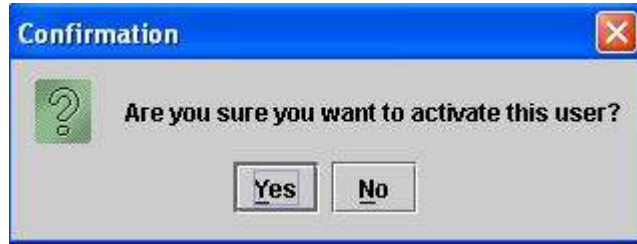
On posting of the entry in the save browser:

- ***Relationship # status in the post browser shall change to 'Blocked'.***
- ***'Active' button becomes enabled.***
- ***'Block' button becomes disabled.***
- ***'Generate Password' button becomes disabled.***

- v. An account with 'Locked' status could not be 'Blocked' and vice versa.

3.1.7 **‘ACTIVATE’**

- i. ‘Active’ button shall be enabled if record status is ‘Blocked’.
- ii. For record with ‘Block’ status, only ‘Active’ and ‘Cancel’ button shall be enabled.
- iii. On clicking the ‘Active’ button for the selected record, system shall prompt the following message:



- iv. Standard ‘Information’ message shall appear on affirming the confirmation message.
- v. A corresponding entry shall be created in ‘Save’ browser with ‘To be Activate’ status.

Note E:

On posting of the entry in the save browser:

- ***Relationship # status in the post browser shall change to ‘Block’.***
- ***‘Block’ button becomes enabled.***
- ***‘Generate Password’ button becomes enabled.***

3.1.8 **‘CANCEL’**

- i. Cancel button shall remain enabled for ‘Locked’, ‘Blocked’ and ‘Active’ statuses.
- ii. Clicking the ‘Cancel’ button shall redirect the user to the main screen.

4. WEB ACTIVATION FUNCTIONALITY; ‘SAVE BROWSER’

The ‘Save’ browser of Web Activation functionality provides an interface to ‘Post’ or ‘Delete’ entries that are initiated from the post browser. On execution of a function on an entry in the post browser, a corresponding entry shall be created in the ‘Save’ browser. Relevant status shall appear with every entry in the ‘Save’ browser indicating the reason for which the entry is in ‘Save’ mode.

The screenshot shows a window titled "Web Element Activation" with a "Save" button and a "Post" button. Below these are "Record Selection" and "Search Options" sections. The "Search Options" section includes input fields for "Transaction ID", "Relationship # 1" (with value "42887"), and "Status" (with value "All"). There are "Search" and "Refresh" buttons. Below the search options is a table with the following columns: TRANSACTION ID, RELATIONSHIP #, DESCRIPTION, LAST ACTIVITY DATE, PASSWORD GENERATED, and STATUS. The table is currently empty. At the bottom of the window are "Post", "Delete", and "Cancel" buttons.

Web Element Activation; Save Browser – Participant Admin end

1. The ‘Save’ browser shall have two panels namely, ‘Search Options’ and ‘Data grid’ along with following functional buttons.
 - a) Post
 - b) Delete
 - c) Cancel

2. Search Fields:

Transaction ID: a) Transaction ID fields shall appear blank

Relationship #: a) 1st field shall appear in disable mode with auto-populated value of ‘1’
b) 2nd field shall appear in disabled mode with auto-populated value of five digit participant’s id.

- c) 3rd field shall appear in enabled mode for entering the account number.

Status:

- a) **All** – Default
- b) To be Blocked
- c) To be Activated
- d) Password to be Generated
- e) Password attempts to be Reset
- f) Secret Key attempts to be Reset

- 3. On accessing the 'Save' browser of the 'Web Element Activation' functionality, the data grid shall display all entries in 'Transaction id' wise ascending order.

4.1 ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:

4.1.1 'SEARCH' (SEARCH PANEL)

- i. For locating a specific entry, the participant admin may input criterion values in Transaction id and/or 3rd field of the 'Relationship # fields'.
 - a) Admin may also refine the search for specific or multiple entries through options available in the 'Status' combo.
- ii. If less than 6 numbers are entered in the 3rd field of Relationship # then system shall insert zero(s) before the entered number to make the total digit count equal to 6.
- iii. If 'Search' is executed with an invalid value for transaction id and/or account number in the 3rd field of the relationship # then no record shall appear in the data grid. No message shall be prompted in this case.
- iv. If search is executed without entering any value in 'Transaction id' and '3rd field' of relationship # with 'All' 'Status' then the data grid shall display all entries.

4.1.2 'REFRESH' (SEARCH PANEL)

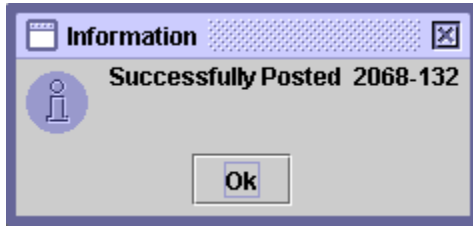
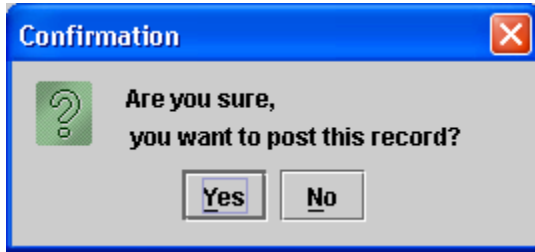
- i. Clicking the 'Refresh' shall reset the 'Transaction Id', '3rd field' of the 'Relationship #', and the 'Data grid' to the default blank state. The 'Status' combo shall revert to default 'All' selection.

4.1.3 'POST'

- i. Clicking the 'Post' button for an entry in 'Save' browser shall commit the operation initiated from the 'Post' browser.

Status (Save)	Action
Password to be Generated	Generates the Password Send email to the sub-account holder. Refer to Note-A of page # 8 for effect on 'Post browser.
Secret Key attempts to be Reset	Reset the invalid attempts counter to maximum available values. Refer to Note-B of page # 9 for effect on 'Post browser.
Password attempts to be Reset	Reset the invalid password counter to maximum available values. Refer to Note-C of page # 10 for effect on 'Post browser.
To be Blocked	Blocks an 'Activate' account. Refer to Note-D of page # 10 for effect on 'Post browser.
To be Activated	Activates a 'Blocked' account. Refer to Note-E of page # 11 for effect on 'Post browser.

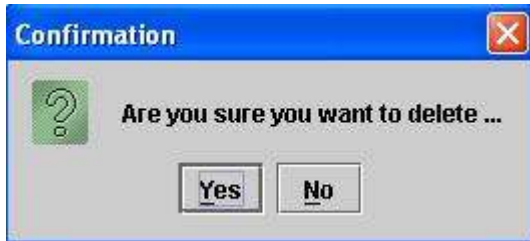
- ii. CDS Standard 'Confirmation' and 'Information' 'Post' Messages shall appear:



- iii. Clicking 'No' on confirmation message shall abort the operation.

4.1.4 **'DELETE'**

- i. Executing 'Delete' for an entry shall delete the 'Save' entry and ignore the operation initiated from the 'Post' browser.
- ii. Status of the Relationship # entry at the post browser shall remain unchanged.
- iii. On clicking 'Delete' an entry system shall prompt following message:



- i. Standard Information message shall be displayed on affirming the confirmation message:



4.1.5 **'CANCEL'**

- i. Clicking the 'Cancel' button shall redirect the user to the main screen.

5. 'WEB ACTIVATION POST DOWNLOAD REPORT'

Web Activation Post Download report provides information required for managing and monitoring web activation tasks. The post' download report, available for 'Specific' or 'All accounts may be used to determine the details of Relationship entities vis-à-vis their statuses and activities perform on them at different time intervals.

The screenshot shows the 'Web Element Activation Report' dialog box. Under 'Report Options', 'Element ID' is set to 'Specific' with the value '42887'. 'Account No.' is set to 'All'. 'Status' is set to 'ALL'. 'From Date' is '03/01/2104' and 'To Date' is '06/10/2104'. Under 'Print Options', 'Download Report' is selected, and 'File Separator' is set to 'Comma'. The 'File' field is empty. 'OK' and 'Cancel' buttons are at the bottom.

Selection Criteria for Web Activation Download –'All' Account No.

The screenshot shows the 'Web Element Activation Report' dialog box. Under 'Report Options', 'Element ID' is set to 'Specific' with the value '42887'. 'Account No.' is set to 'Specific' with an empty text field. 'Status' is set to 'ALL'. 'From Date' is '03/01/2104' and 'To Date' is '06/10/2104'. Under 'Print Options', 'Download Report' is selected, and 'File Separator' is set to 'Comma'. The 'File' field is empty. 'OK' and 'Cancel' buttons are at the bottom.

Selection Criteria for Web Activation Download – 'Specific' Account No.

1. Download for Web Element Activation activities shall be available for post browser.
2. Selection Criteria Fields:

- Element Id:**
- a) **All** - disabled
 - b) **Specific** – selected and disabled with auto populated 'Participant id' of the logged-in participant.

Account No.:

- a) **All** – Default selection
- b) Specific
 - Field shall appear blank in enabled mode. The browse button shall be enabled.
 - Clicking the 'Browse' button shall open the 'Account No.' lookup displaying house, main, sub, and other accounts that belongs to the logged-in participant.
 - Account with 'Closed' status shall not appear in the lookup.
 - Selection of 'Account Number' from the lookup shall work as per standard theme of CDS application.

Status Combo:

- a) **All** – Default selection
- b) Active
- c) Locked
- d) Blocked

From Date: By default Current CDS date shall appear

To Date: By default Current CDS date shall appear

Download Report: Selected by default In disabled mode.

File Button: User shall enter the path for downloading the file either through by typing the path in the 'File' field or by selecting it through 'File' button. Clicking the 'File' button shall open the standard 'Save' window allowing user to select the path. Only 'zip' files could be saved.

File Separator: 'Comma' option shall be selected by default

4. On clicking the 'OK' button, system checks if the input in selection criteria is valid:
 - i. In case of invalid selection, system shall prompt an appropriate message as per existing CDC theme like:



- ii. In case of valid input, system shall display the following message and generates the download.



- iii. Downloaded data shall be sorted on Relationship # wise ascending order.

5. File format:

- i. 1st row: Input parameters,
- ii. 2nd row: column headers
- iii. 3rd row and onwards – data
- iv. Sample:

42887,100284,ALL,04/10/2104,07/10/2104

Relationship Number,Description,Last Activity Date>Password Generated,Status

142887100284,42887 NORMAL PARTICIPANTWWW,05/10/2104 17:26:46,Yes,Active

5.1.1 'CANCEL'

- i. Clicking the 'Cancel' button shall redirect the user to the main screen.

General Information:

- 6. Participant Admin may use the standard date spinner to change the 'From Date' and/or 'To Date' parameters. Alternatively user may also enter the date through keyboard.
- 7. Standard date messages adopted in CDS shall appear in case if From date is greater than To date, From/To date(s) are greater than CDS date, etc.
- 8. On default setting, system shall generate download for 'All' accounts belonging to the logged-in participant except for the Account with 'Closed' status.
- 9. Clicking the 'Browser' button shall open the 'Account No.' lookup displaying sub account, house, main and other accounts that belongs to the logged-in participant except for the 'Closed' status.

6. IVR ACTIVATION FUNCTIONALITY; ‘POST BROWSER’

The ‘IVR Activation’ Post browser provides the initiation interface for relationship entities after the data growth process. From the ‘Post’ browser the admin user shall initiate Generate password, Block, Activate and Resetting of Secret key and Resetting of Password.

RELATIONSHIP #	DESCRIPTION	LAST ACTIVITY DATE	TPIN GENERATED	ALLOWED RETRIES	RETRIES AVAILABLE	STATUS
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IVR Activation; Post Browser – Participant Admin end

1. On accessing the ‘Post’ tab of the ‘IVR Activation’, system shall display blank data grid.
2. The ‘Post’ browser shall have two panels ‘Search Options’ and ‘Data grid’ along with following IVR Activation related functional buttons:
 - a) Reset Retires
 - b) Activate
 - c) Cancel

Search Fields:

- Relationship #:**
- a) 1st field shall appear in disable mode with auto-populated value of ‘1’
 - b) 2nd field shall appear in disabled mode with auto-populated value of five digit participant’s id.
 - c) 3rd field shall appear in enabled mode.
- Status:**
- a) **All** – Default
 - b) **Locked** – Initial status of every new ‘Relationship #’ entry.

Relationship status shall also change from 'Activate' to 'Locked' if number of failed 'TPIN Retires' attempts surpasses the allocated numbers.

- c) **Active** – On the first instance of IVR Activation of the account, the admin user shall manually activate (save/post) the entry after the client user successfully enters the TPIN through IVR telephony service.

6.1 ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:

6.1.1 'SEARCH' (SEARCH PANEL)

- i. The participant searches record for a specific Sub-Account by entering the 'Account Number' in the 3rd field of the 'Relationship #'.
 - a) User may also opt for a specific 'status' search through 'Status' combo.
- ii. If less than 6 numbers are entered in the 3rd field of Relationship # then system shall insert zero(s) before the entered number to make the total digit count equal to 6.
- iii. If 'Search' is executed without any value in the 3rd field of the relationship # then 'Data grid' shall remain blank. Same shall be the case for invalid account number entry. No message shall be prompted in this case.
- iv. On searching a new subscription record for which the TPIN is not yet generated, following values shall appear:

Column	Value
Relationship #	12 digit number
Description	Account description
Last Activity Date	N/A
Allowed Retries	8
Available Retries	8
TPIN Generated	No
Status	Locked

- v. After the sub-account holder generates the TPIN through IVR telephony service the 'TPIN Generated' shall become 'Yes'.
- vi. Relationship # for which data growth is not done, the 'Allowed Retries' and 'Available Retires' shall display '0'.

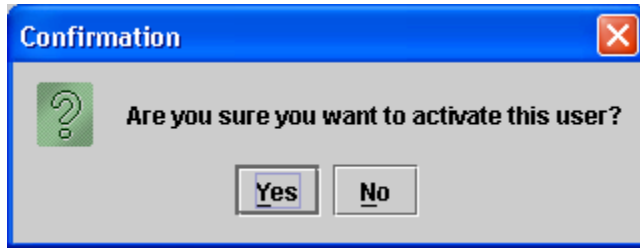
6.1.2 'REFRESH' (SEARCH PANEL)

- i. Clicking the 'Refresh' shall reset the 3rd field of the 'Relationship #', and the 'Data grid' to the default blank state. The 'Status' combo shall revert to default 'All' selection.

6.1.3 'ACTIVE'

- i. 'Active' button shall be enabled for IVR entries for which TPIN is not yet generated.
- ii. For such entries the status shall be 'Locked' and only following buttons shall be enabled:
 - a) Activate

- b) Cancel
- iii. User selects the records and clicks the 'Active' button
- iv. System shall prompt the following 'Confirmation' message:



- v. On affirmation on the above message, system shall create a corresponding entry in the 'Save' browser with 'To be Activated' status.

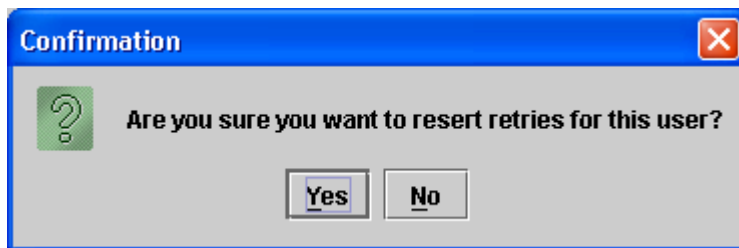
Note F:

On posting of the entry in the save browser:

- ***System shall activate the relationship # for IVR.***
- ***The status shall change from 'Locked' to 'Active'.***
- ***'Active' button shall become disabled.***
- ***'Reset Retires' button remains disabled.***

6.1.4 'RESET RETRIES'

- i. The 'Reset Retires' button becomes enable if the sub-account holder surpasses the maximum allowed attempts set for entering the TPIN.
 - a) For such entries, the status shall also change from 'Active' to 'Locked'
- ii. On user's request, the participant admin shall select the entry and click 'Reset Retires' button.
- iii. System prompts the following 'Confirmation' message:



- iv. On affirmation on the above message, system shall create a corresponding entry in the 'Save' browser with 'Retries to be Reset' status.

Note G:

On posting of the entry in the save browser, system:

- ***initializes the 'Retries Available' count to maximum number (8)***
- ***activates the relationship #.***
- ***Change the status from 'Locked' to 'Active' in the post browser.***
- ***'Active' button becomes disabled in the post browser.***
- ***'Reset Retires' button becomes disabled in the post browser.***

6.1.5 'CANCEL'

- i. Cancel button shall remain enabled for both 'Active' and 'Locked' status.
- ii. Clicking the 'Cancel' button shall redirect the user to the main screen.

General Information:

- i. The grid shall only display a single record at a time, which shall be fetched on search execution.
- ii. On accessing a relationship # for which the data growth is not done, 'Activate' and 'Reset Retires' button appears in disabled mode.



7. IVR ACTIVATION FUNCTIONALITY; ‘SAVE BROWSER’

The ‘Save’ browser of IVR Activation functionality provides an interface to ‘Post’ or ‘Delete’ entries that are initiated from the post browser. On execution of a function on an entry in the post browser, a corresponding entry shall be created in the ‘Save’ browser. Relevant status shall appear with every entry in the ‘Save’ browser indicating the reason for which the entry is in ‘Save’ mode.

TRANSACTION ID	RELATIONSHIP #	DESCRIPTION	LAST ACTIVITY DATE	TPIN GENERATED	ALLOWED RETRIES	RETRIES AVAILABLE	STATUS
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IVR Activation; Save Browser – Participant Admin end

1. The ‘Save’ browser shall have two panels namely, ‘Search Options’ and ‘Data grid’ along with following functional buttons.
 - a) Post
 - b) Delete
 - c) Cancel
2. On execution of a function on an entry in the post browser, a corresponding entry shall be created in the ‘Save’ browser. Relevant status shall appear with every entry in the ‘Save’ browser indicating the reason for which the entry is in ‘Save’ mode.

Search Fields:

Transaction ID: a) Transaction ID fields shall appear blank

- Relationship #:**
- a) 1st field shall appear in disable mode with auto-populated value of '1'
 - b) 2nd field shall appear in disabled mode with auto-populated value of five digit participant's id.
 - c) 3rd field shall appear in enabled mode for entering the account number.

- Status:**
- a) **All** – Default
 - b) To be Activated
 - c) Retries to be Reset

- 3. On accessing the 'Save' browser of the 'IVR Activation' functionality, the data grid shall display all entries in 'Transaction id' wise ascending order.

7.1 ACTIONS PERFORMED ON FUNCTIONAL BUTTONS:

7.1.1 'SEARCH' (SEARCH PANEL)

- i. For locating a specific entry, the participant admin may input criterion values in Transaction id and/or 3rd field of the 'Relationship # fields'.
 - a) Admin may also refine the search for specific or multiple entries through options available in the 'Status' combo.
- ii. If less than 6 numbers are entered in the 3rd field of Relationship # then system shall insert zero(s) before the entered number to make the total digit count equal to 6.
- iii. If 'Search' is executed with an invalid value for transaction id and/or account number in the 3rd field of the relationship # then no record shall appear in the data grid. No message shall be prompted in this case.
- iv. If search is executed without entering any value in 'Transaction id' and '3rd field' of relationship # with 'All' 'Status' then the data grid shall display all entries.

7.1.2 'REFRESH' (SEARCH PANEL)

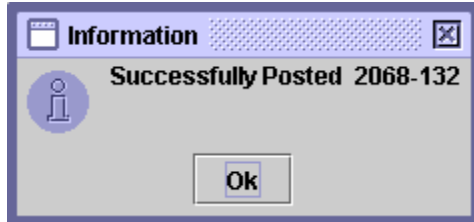
- i. Clicking the 'Refresh' button shall reset the 'Transaction Id', '3rd field' of the 'Relationship #', and the 'Data grid' to the default blank state. The 'Status' combo shall revert to default 'All' selection.

7.1.3 'POST'

- i. Clicking the 'Post' button for an entry in 'Save' browser shall commit the operation initiated from the 'Post' browser.

Status (Save)	Action
To be Activated	Activates the relationship # for IVR. Refer to Note-F, page # 22 for effect on 'Post browser
Retries to be Reset	Reset the invalid attempts counter to maximum available values. Refer to Note-G, page # 23 for effect on 'Post browser

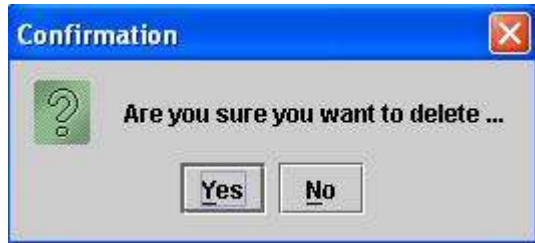
- ii. CDS Standard 'Confirmation' and 'Information' 'Post' Messages shall appear:



- iii. Clicking 'No' on confirmation message shall abort the operation.

7.1.4 **'DELETE'**

- i. Executing 'Delete' for an entry shall delete the 'Save' entry and ignore the operation initiated from the 'Post' browser.
- ii. Status of the Relationship # entry at the post browser shall remain unchanged.
- iii. On clicking 'Delete' an entry system shall prompt following CDS Standard message:



- iv. Standard Information message shall be displayed on affirming the confirmation message.



7.1.5 **'CANCEL'**

- i. Clicking the 'Cancel' button shall redirect the user to the main screen.

8. ‘IVR ACTIVATION POST DOWNLOAD REPORT’

IVR Activation Post Download report provides information required for managing and monitoring IVR activation tasks. The download report available for ‘Specific’ or ‘All accounts may be used to determine the details of Relationship entities vis-à-vis their statuses and activities perform on them at different time intervals.

The screenshot shows the 'IVR Activation Report' dialog box. Under 'Report Options', 'Element ID' is set to 'Specific' with the value '42887'. 'Account No.' is set to 'All'. 'Status' is set to 'ALL'. 'From Date' and 'To Date' are both set to '07/10/2104'. Under 'Print Options', 'Download Report' is selected, and 'File Separator' is set to 'Comma'. The 'File' field is empty. The 'OK' and 'Cancel' buttons are at the bottom.

Selection Criteria for IVR Activation Download – ‘All’ Account No.

The screenshot shows the 'IVR Activation Report' dialog box. Under 'Report Options', 'Element ID' is set to 'Specific' with the value '42887'. 'Account No.' is set to 'Specific' with an empty text field. 'Status' is set to 'ALL'. 'From Date' and 'To Date' are both set to '07/10/2104'. Under 'Print Options', 'Download Report' is selected, and 'File Separator' is set to 'Comma'. The 'File' field is empty. The 'OK' and 'Cancel' buttons are at the bottom.

Selection Criteria for IVR Activation Download – ‘Specific’ Account No.

1. Selection Criteria Fields:

- Element Id:**
- a) **All** - disabled
 - b) Specific – selected and disabled with auto populated ‘Participant

id' of the logged-in participant.

- Account No.:**
- a) **All** – Default selection
 - b) Specific
 - Field shall appear blank in enabled mode. The browse button shall be enabled.
 - Clicking the 'Browse' button shall open the 'Account No.' lookup displaying house, main, sub, and other accounts that belongs to the logged-in participant.
 - Account with 'Closed' status shall not appear in the lookup.
 - Selection of 'Account Number' from the lookup shall work as per standard theme of CDS application.

- Status Combo:**
- a) **All** – Default selection
 - b) Active
 - c) Locked

From Date: By default Current CDS date shall appear

To Date: By default Current CDS date shall appear

Download Report: Selected by default In disabled mode.

File Button: User shall enter the path for downloading the file either through by typing the path in the 'File' field or by selecting it through 'File' button. Clicking the 'File' button shall open the standard 'Save' window allowing user to select the path.

File Separator: 'Comma' option shall be selected by default

- 2. On clicking the 'OK' button, system checks if the input in selection criteria is valid:
 - i. In case of invalid selection, system shall prompt an appropriate message as per existing CDC theme like:



- ii. In case of valid input, system shall display the following message and generates the download.



- iii. Download shall be sorted on Relationship # wise in ascending order.

3. File format:

- i. 1st row: Input parameters,
- ii. 2nd row: column headers
- iii. 3rd row and onwards – data
- iv. Sample:

42887,ALL,ALL,07/10/2104,07/10/2104

Relationship No.,Description,Last Activity Date,TPIN Generated,Allowed Retries,Retries Available,Status

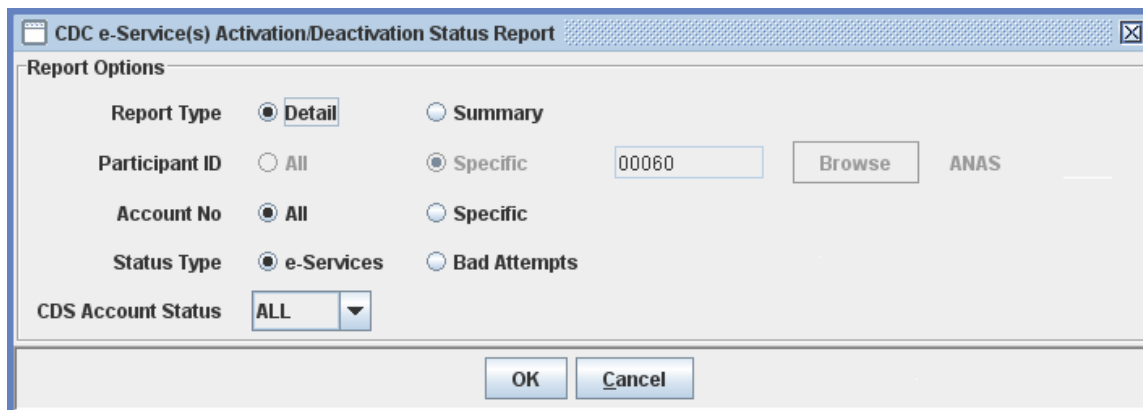
General Information:

4. On default setting, system shall generate download for 'All' accounts belonging to the logged-in participant except for the Account with 'Closed' status.
5. Participant Admin may use the standard date spinner to change the 'From Date' and/or 'To Date' parameters. Alternatively user may also enter the date through keyboard.
6. Standard date messages adopted in CDS shall appear in case if From date is greater than To date, From/To date(s) are greater than CDS date, etc.
7. Clicking the 'Browse' button shall open the 'Account No.' lookup displaying sub account, house, main and other accounts that belong to the logged-in participant except for the 'Closed' status.

9. CDC E-SERVICES(S) ACTIVATION/DEACTIVATION STATUS REPORT

This report can be used by the participant to see either the activation / deactivation status of IVR/Web, SMS, e-Statement, e-Alert for the sub account holders, or the bad attempts made by the sub account holders on password, secret key and / or T-PIN.

The report can be accessed under the Account Maintenance Reports menu by clicking the menu item “CDC e-Services(s) Activation/Deactivation Status Report”. Clicking this menu item displays the screen shown below:



The screenshot shows a dialog box titled "CDC e-Service(s) Activation/Deactivation Status Report". It contains the following fields and options:

- Report Options**
- Report Type:** Radio buttons for Detail and Summary.
- Participant ID:** Radio buttons for All and Specific. A text box contains "00060" and a "Browse" button. The label "ANAS" is visible to the right.
- Account No:** Radio buttons for All and Specific.
- Status Type:** Radio buttons for e-Services and Bad Attempts.
- CDS Account Status:** A dropdown menu currently set to "ALL".
- Buttons for "OK" and "Cancel" at the bottom.

1. In order to display or print a report, the user needs to enter the following data:

Report Type The user has the option to generate the detailed or summary report. Summary report is available only for status type e-Services.

Account No. The 'Account No.' field allows the user to generate the detailed report for 'All' accounts under the Participant's control or for a 'Specific' account. A textbox is displayed for entering the account number if the 'Specific' radio button is selected. A 'Browse' button is provided by the side of the field to give the user access to a lookup table in case the user does not remember the correct account no. Summary report can only be generated for All accounts.

Status Type The user has the option to generate the report either for e-Services or for Bad Attempts. e-Services Status type report can be used by the

participant to see the activation / deactivation status of IVR/Web, SMS, e-Statement, e-Alert for the sub account holders.

Bad Attempts status type report can be used by the participant to see the bad attempts made by the sub account holders on password, secret key and / or T-PIN as well as see the respective their current statuses on them.

When the user clicks the Bad Attempts status type then the following screen will be shown to the user

The screenshot shows a dialog box titled "CDC e-Service(s) Activation/Deactivation Status Report". It contains a "Report Options" section with the following settings: Report Type is "Detail"; Participant ID is "Specific" with the value "00060" and a "Browse" button; Account No is "All"; Status Type is "Bad Attempts"; Web Service Status is "ALL"; IVR Service Status is "ALL"; and Zero Available Retries checkboxes for Password, Secret Key, and T-PIN are all unchecked. "OK" and "Cancel" buttons are at the bottom.

CDS Account Status The user has the option to generate the report for All, Active or Blocked CDS accounts. This option is available only for Status Type e-Services.

Web Service Status The user has the option to generate the report for All, Active, Locked or Blocked Web Services. This option is available only for Status Type Bad Attempts.

IVR Service Status The user has the option to generate the report for All, Active or Locked IVR Service. This option is available only for Status Type Bad Attempts.

Zero Available Retries The user has the option to generate the report only for the sub account holders who have zero available retries remaining for Password, Secret-Key and / or T-PIN. The user can do this by selecting the respective checkbox. By default these checkboxes will be unchecked, which will mean that all those accounts will be retrieved in the report which do not have zero available retires.

Clicking the 'OK' button will display the report on the screen and the 'Cancel' button will quit the program without displaying the report.

When the detailed report is generated for e-Services Status type, the report will show the following columns: Account No., SMS Status, IVR/Web Status, e-Statement Status, e-Alert Status, CDS Account Status

When the summary report is generated for e-Services Status type, the report will show the total sub accounts subscribed each for SMS, IVR/Web, e-Statement and e-Alert.

When the detailed report is generated for Bad Attempts Status type, the report will show the following columns: Account No., Password Generated, Bad Password Attempts, Password Status, Bad Secret Key Attempts, Secret Key Status, Web Service Status, T-PIN Generated, Bad T-PIN Attempts, T-PIN Status, IVR Service Status

When the report is displayed, the user can get it printed.