DeNederlandscheBank
EUROSYSTEEM

Subject
Update - Circular Letter User Creation ECMS

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Dear counterparty,

In this letter we will provide you with a step-by-step guide on the creation of new users in the ECMS.

In case you have questions, feel free to ask them using the ECMS-testsupport@dnb.nl e-mail address.

Updates

Date	Subject
21/03/2024	**Support of multiple DN's**
28/06/2024	**4-eyes validation update instruction**

This manual has been updated since the procedure to create new users has changed since the implementation of Change Request ECMS-0084-UDFS – many certificate DN to one ECMS system user.

Date
28 June 2024

Your reference

Our reference
P370-280995920-5429

Handled by

Telephone number

Email address
ECMS-testsupport@dnb.nl

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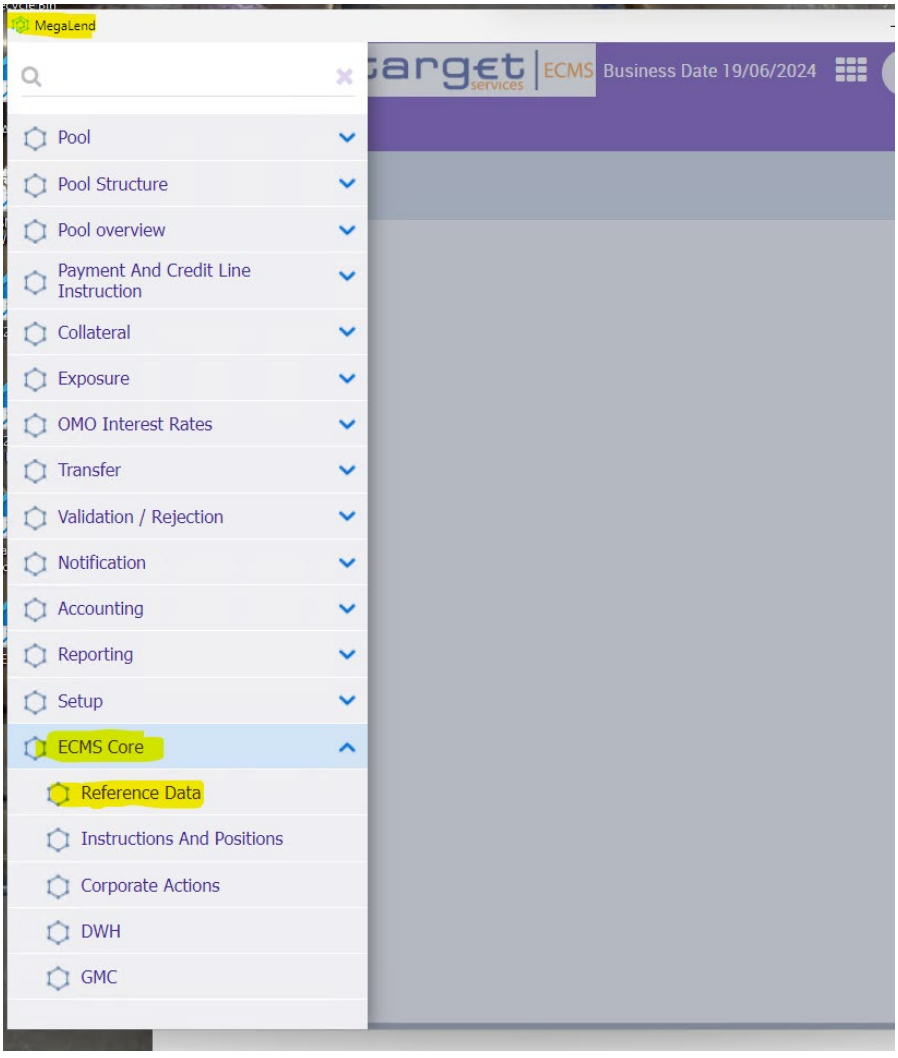
Step 1: Logging on to the ECMS main module (MegaLend).

Opening the main menu using the left corner button , will show you the following screen:



Then switch to the MegaCommon Module by selecting the "ECMS Core" option in the left menu, and then selecting "Reference Data".

Date
28 June 2024

Our reference
P370-280995920-5429

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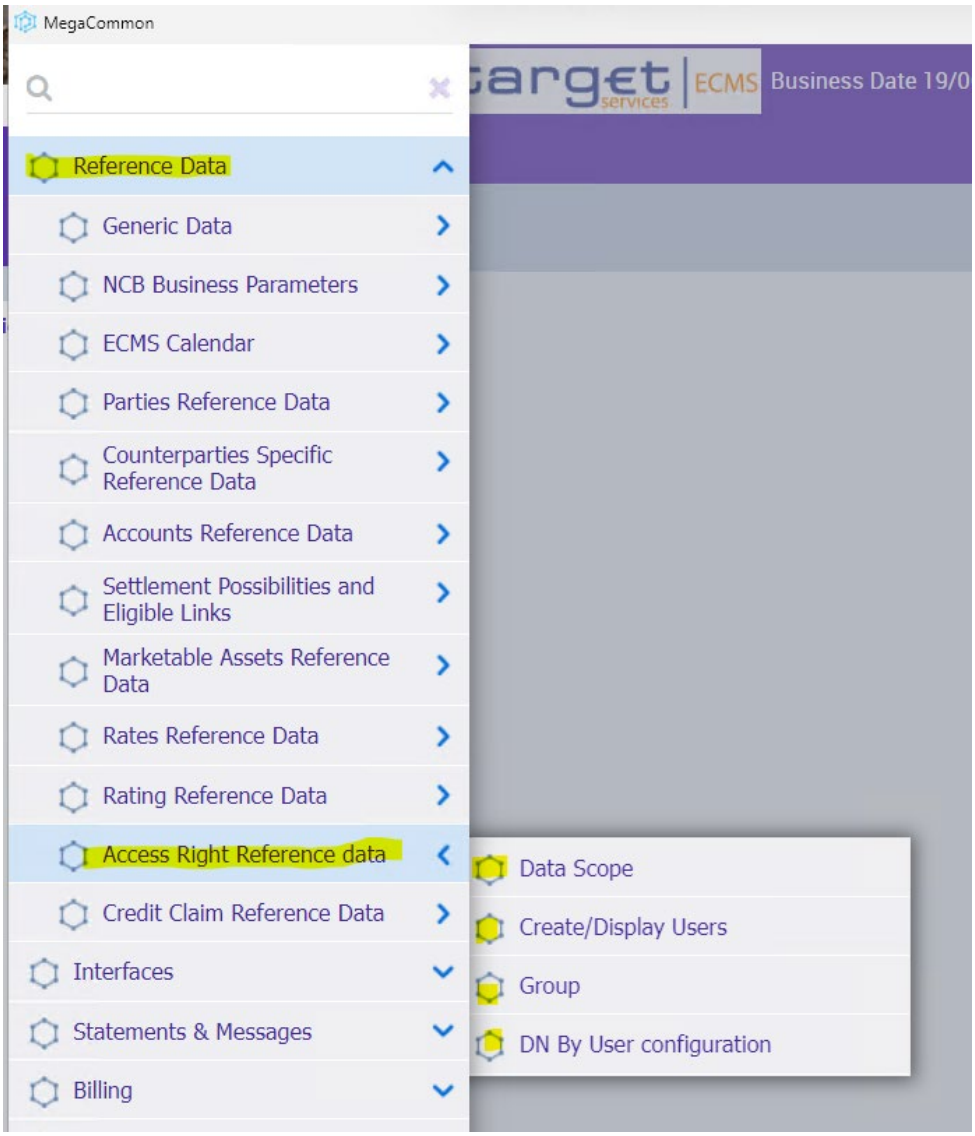
Step 2: Upon having successfully completed the previous step, you will now have switched from MegaLend to the MegaCommon module, which will open in a pop-up screen.



Step 3: First select the "Reference Data" option in the main menu, then select the "Access Right Reference data" option, and finish by selecting the "Create/Display Users" option.

Date
28 June 2024

Our reference
P370-280995920-5429

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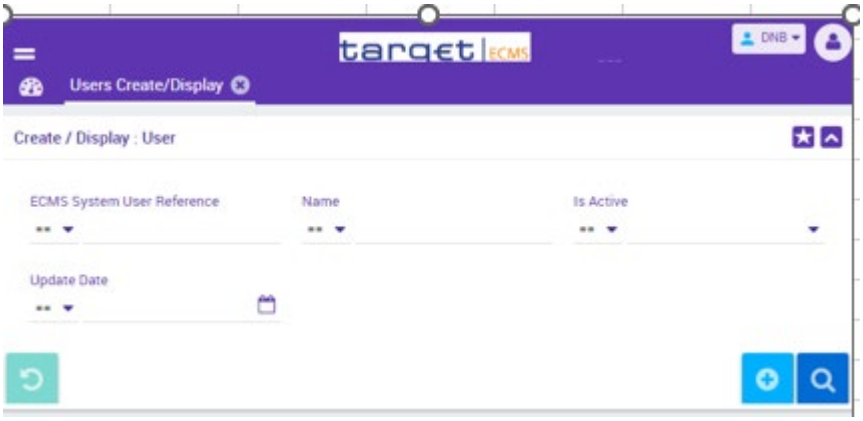
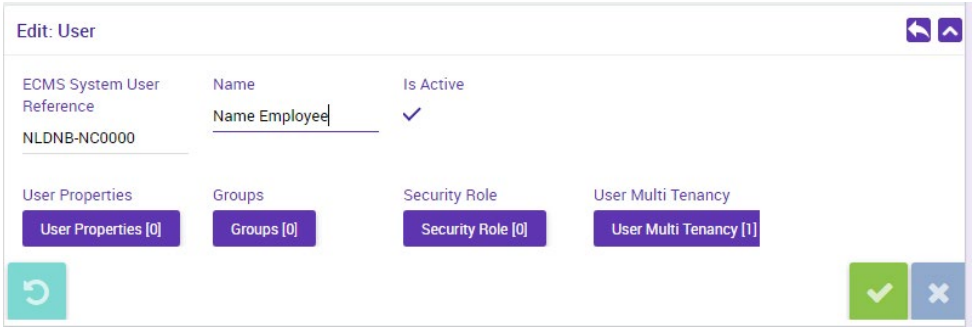
Step 4: Select the blue "+/Create" button, which will open an editor.



Step 5:



Fill in: "ECMS System User Reference"
And: "Name" of the user.

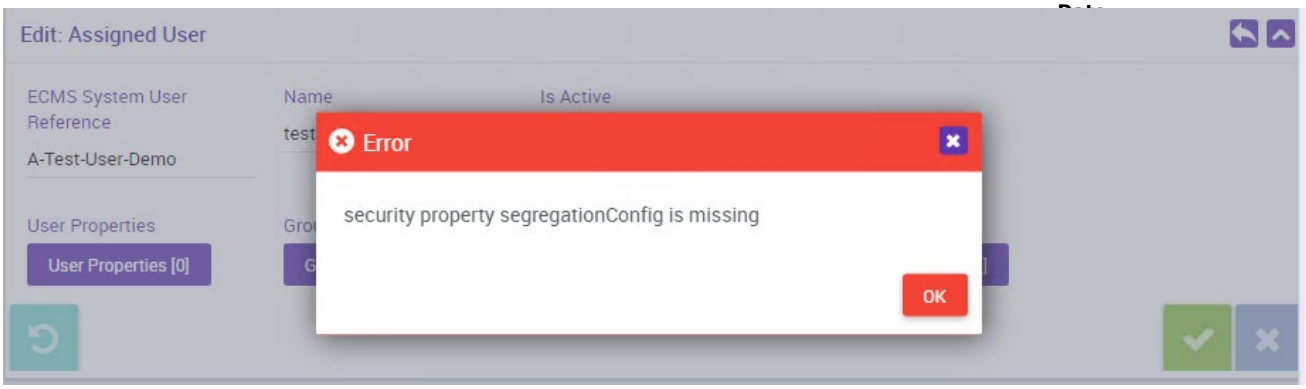
Continue by setting up the "User properties" in Step 5a.

After that we will go on with the Security role(s), or Groups in Step 5b and 5c respectively. We will first focus on adding individual roles (5b), however if multiple users are to be configured with the same profile, it can be worthwhile to configure first the roles in a group and add the respective users to that group. This will be done in Step 5c.

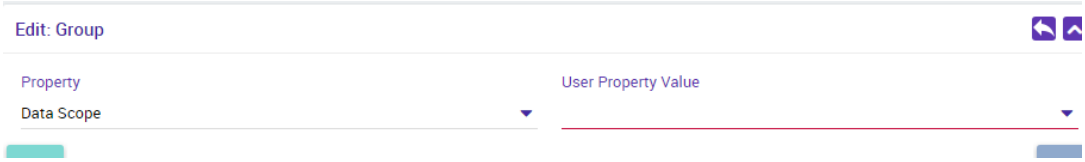
Date
28 June 2024

Our reference
P370-280995920-5429

To be able to save the Added User, you need to at least have assigned the 'Data Scope' within the User Properties. Without this information, no data will be saved, and you will be presented with the Error message:



Step 5a (assigning user data scope): In order to set up the "User properties", This can be done by clicking on the "User Properties" button, and after that selecting the create- button. Continue by selecting from the "Property" drop down menu, "Data Scope", but most likely this will have been presented automatically.



Select from the 'User Property Value' - list the record that includes the RIAD code of your institution (Example: "Example Default_9|NL001|DNB1"). In most cases, only one record will appear in your drop-down menu for the "Data Scope" option.

Select first the button and then the

if you decide to stop editing.

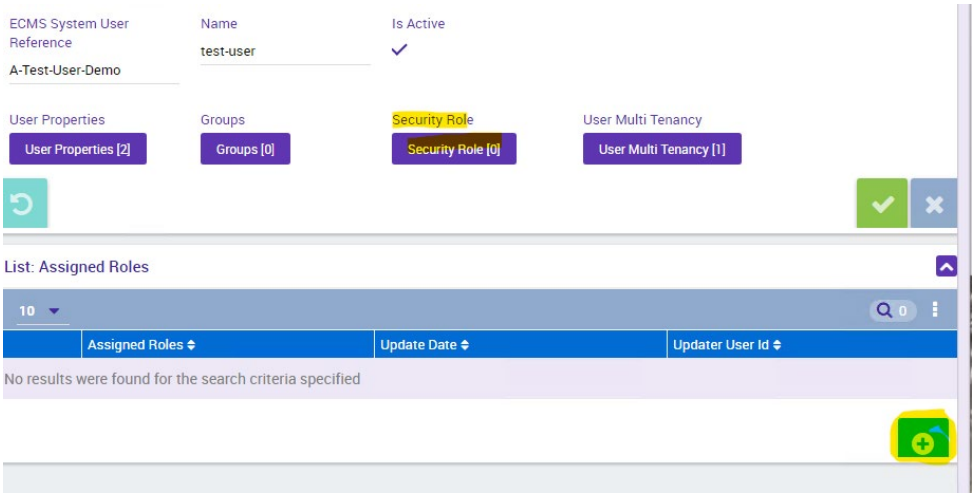
DeNederlandscheBank
EUROSYSTEEM

Date
28 June 2024

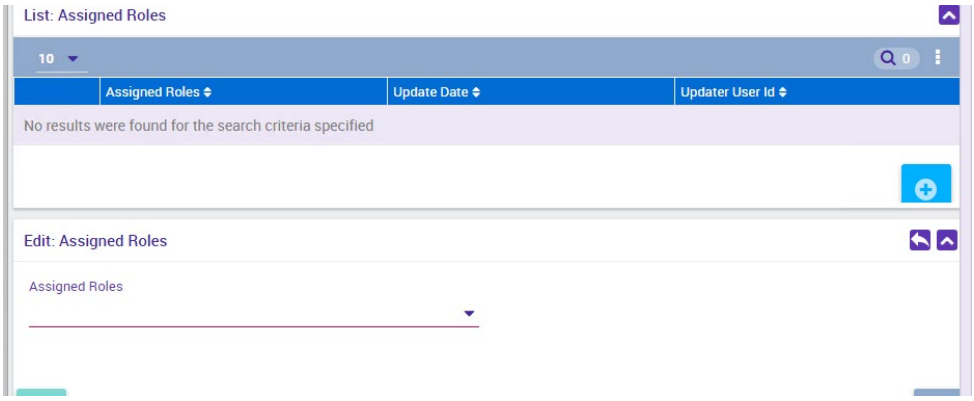
Our reference
P370-280995920-5429

If you decide to continue and assign the security roles, do not click the 'Save button', as this will send you into 'View-mode'; you want to stay in Edit mode'.

So click the button "Security Role", and after that click Add:



Step 5b (assigning security roles):
A screen will open: "List: Assigned Roles". If you want to Add a role press the create button.
A new screen appears underneath the list of assigned roles, named the "Edit: Assigned Role" screen. Here you find the drop-down menu, and the different kinds of roles can be found.



Keep selecting and clicking on the back button , until you have added all the roles you want. Then confirm by using the Save button in the "Edit: User" screen. A confirmation pop-up appears,select "Yes". If successful, you will receive a success pop-up. Note that every user must have a validator/super validator role assigned.

It is not possible to assign A2A and U2A roles to one single user. When trying to save this item the following error message will be presented:

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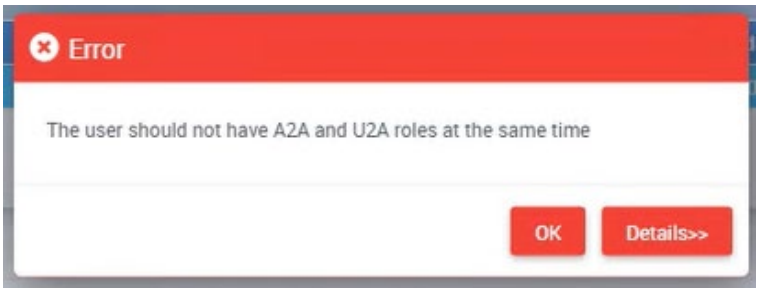
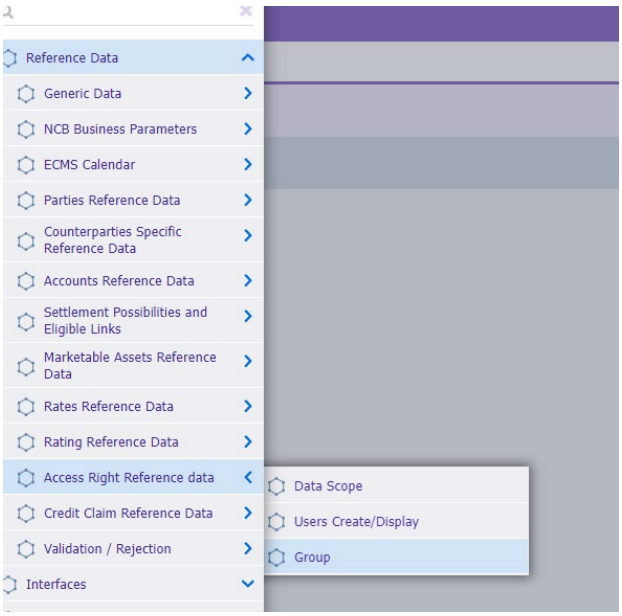


In case you want to delete a role, select the role in the "List: Assigned Roles" and click on Delete button.

Step 5c (setting up a Group):
In order to use the "Group" functionality, which contains several roles, to which users can be added, first a "Group" needs to be created. Navigate via "Access Right Reference Data" to "Group".



In the new window "Create/Display/Group", click create, then "Edit: Group", and enter the Group ID and group name.
Then select "Group Properties", and "Edit: User Properties" will open. Press Create. Then Select from User property value the record that includes the RIAD code of your institution (Example: "Example Default_9|NL001|DNB1"). Press the back button.

In order to assign roles to the group "Assigned Roles" and underneath the "List: Assigned Roles" will open. Press Create and "Edit: Assigned Role" will open. Select from the drop-down menu the roles you want to add to the group and press the back button. Press save in the "Edit: Group" window once you have selected all roles to in order to save the group. Note that every group must contain a validator/super validator role**.** If saved successfully, this will show in a pop-up window.

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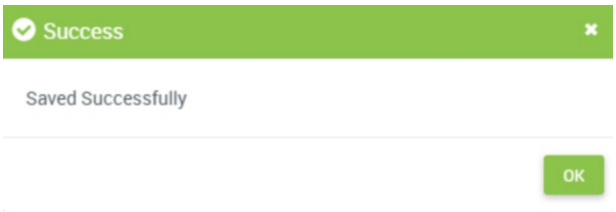


Date
28 June 2024

Our reference
P370-280995920-5429

If you want to amend the group, or add assigned users, go back to the "Group" window and press the Edit button. Select the group and select "Edit". The "Edit: Group" window will open, and you can select the "Assigned Users" button to add or modify the users in the group. In doing so, the "List: Assigned Users" will open. To add a user, press the "Create button". Search for the relevant user using for instance the "Name" Field, in combination with the search button. Select the user in the "Search Result: User" window. Select the user and press the "Select" button. Then save the changes in the "Edit: Group" window.

In case you want to delete the user from the group, you can select the user in the "List: Assigned Users" and then select the "delete" button.

Step 5d (assign DN to user)
After successful creation of a user, at least one DN should be assigned to that user. Go to Reference Data -> Access Right Reference data -> DN By User configuration

Click Create and select the user created in step 5 in the User Id drop down menu, fill in the Dn and confirm. If you have **multiple DN** for one user, you should repeat step 5d for each DN that needs to be linked to a user.

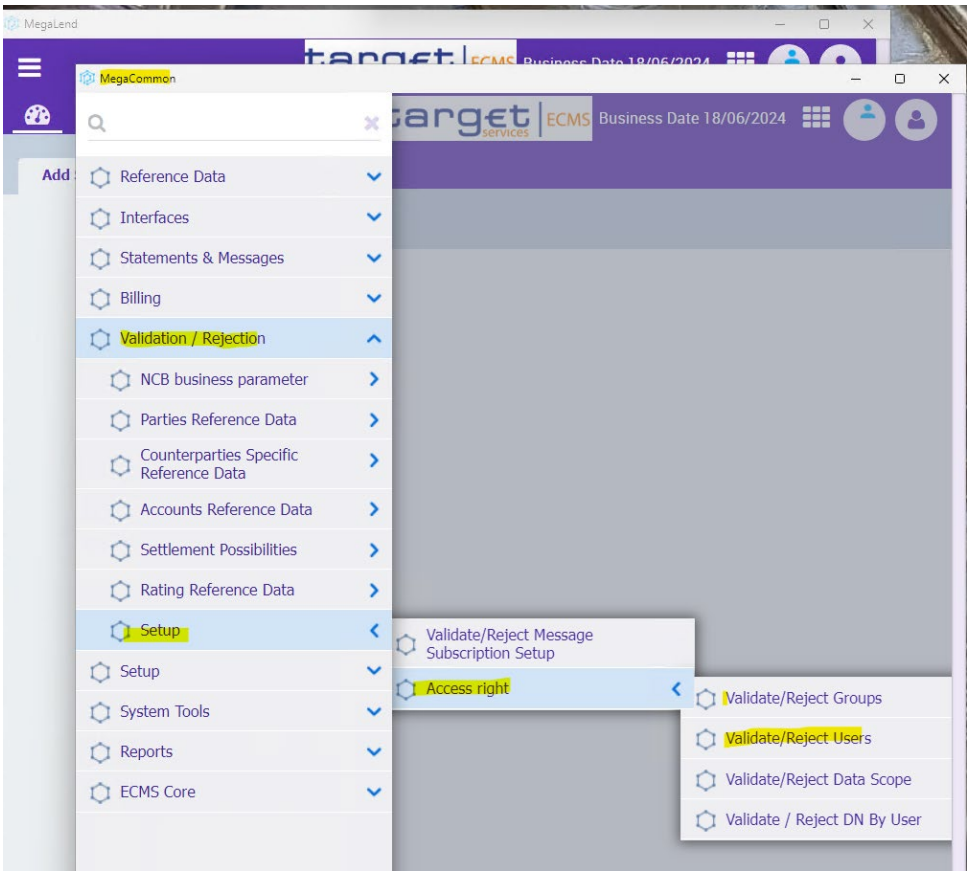
DeNederlandscheBank
EUROSYSTEEM

Date
28 June 2024

Our reference
P370-280995920-5429

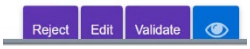
4-eyes validation (optional)

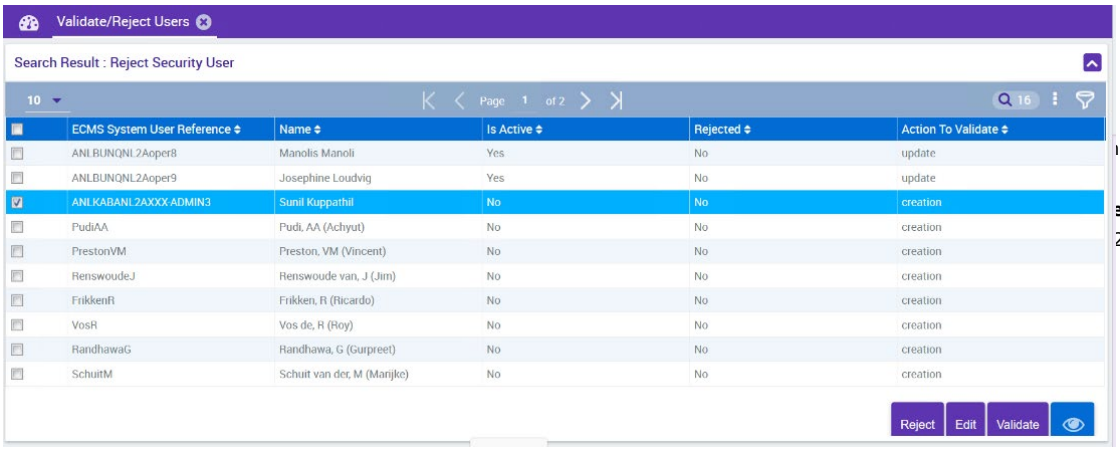
In case of 4-eyes configuration, a second user will have to approve or reject the new or updated user via Validation / Rejection -> Setup -> Access right -> Validate/Reject Users



There are two possibillities for validation:

1. In the situation when the 'Action to validate' (last column) is '*creation*'.
   In that situation, after having selected the item, the buttons Reject/Edit/Validate will appear at the right-hand bottom of the screen to use.





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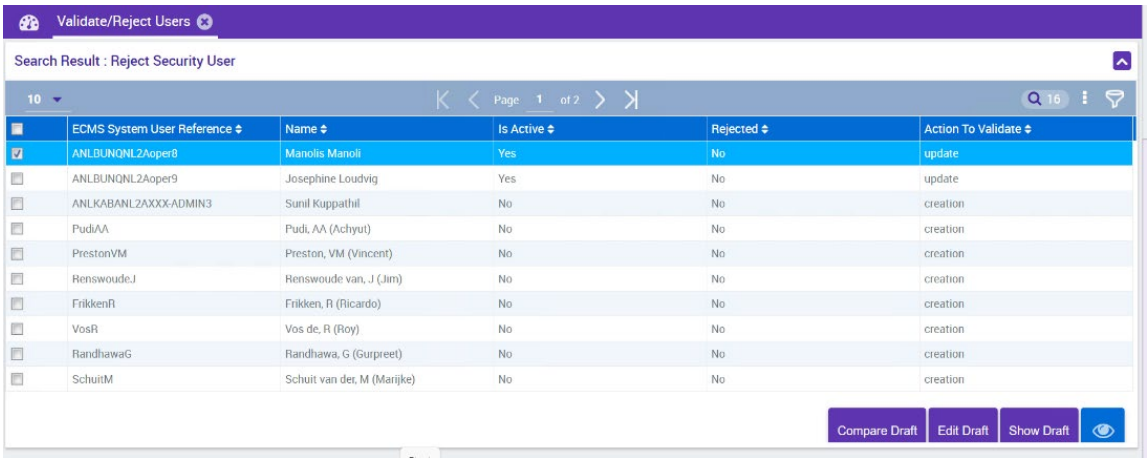
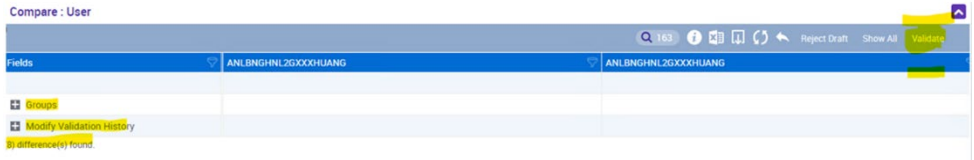
280995920-5429

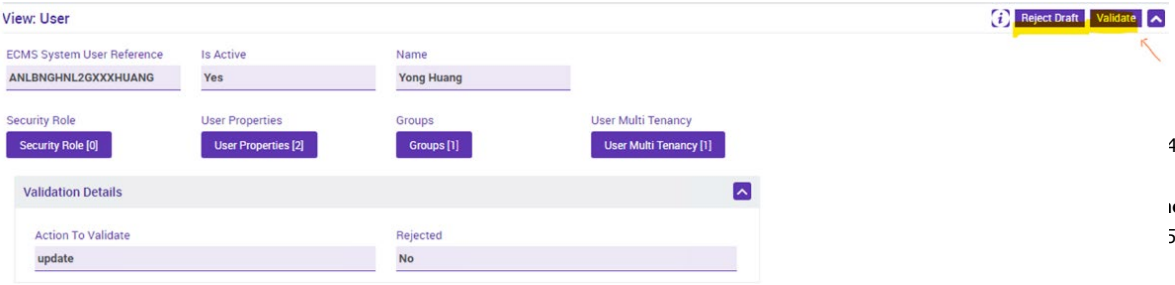
2. Or if the 'Action to validate' (last column) is '*update*'.
   In that situation, after having selected the item, the buttons
   Compare Draft | Edit Draft | Show Draft | 👁 will show at the bottom right hand of the screen.



When button '**Compare draft'** is clicked**,** the next screen will show the difference(s) between 'old' and 'new', and also the 'Validate'-button will be presented in the right-hand top of the screen:



When button '**Show draft'** is clicked, the following screen will show the update data, and both the 'Validate'-button plus 'Reject Draft'-button will appear in the top right-hand side of the screen.



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Further information
More information about users and roles can be found in the ECB links below.

U2A and A2A roles in the ECMS

ECMS User Handbook for Counterparties
(3.1.7.1.1 Users Create / Display on page 122)

In case you have any further questions, do not hesitate to contact us.

Yours sincerely,
DNB ECMS team