DeNederlandscheBank
EUROSYSTEEM

Subject
Circular Letter User Creation ECMS

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Date
June 22 2023

Your reference

Our reference
P370-280995920-2694

Handled by

Telephone number

Email address
ECMS-testsupport@dnb.nl

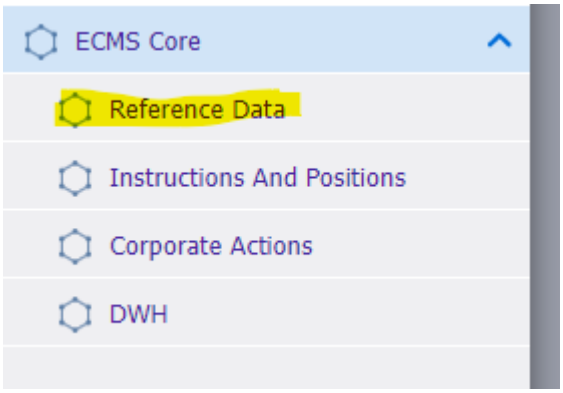
Dear counterparty,

In this letter we will provide you with a step-by-step guide on the creation of new users in the ECMS. We kindly ask you to go through these steps before our workshop on Monday 26th of June (10.00-12.00 CET). In case you have questions prior to the workshop, feel free to ask them using the ECMS-testsupport@dnb.nl e-mail address.

Please note that in this manual we use the super validator role, which implies that there is no four-eyes principle. This function will be available from Friday 23th June onwards, and in July 2023 we will provide you with an updated manual that does include a four eye-principle. In the test and production environment we highly recommend all counterparties to utilize the regular validator, rather than super validator roles for these procedures.

Step 1: Logging on to the ECMS main module (MegaLend).
Step 2: Switch from MegaLend to the MegaCommon module.

This can be done by opening the main menu using the left corner button , and then selecting the "ECMS Core" option in the left menu, and then lastly selecting "Reference Data". Upon successful completion, the MegaCommon module 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 "Users Create/Display" option.

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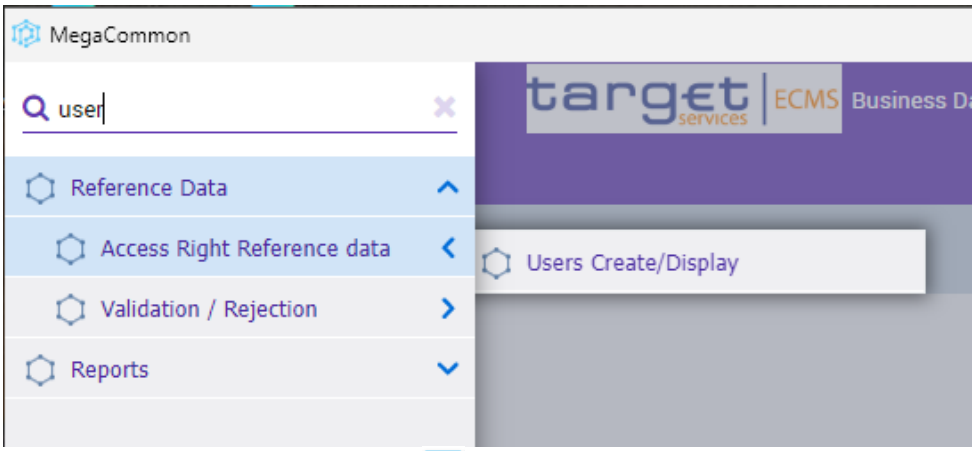
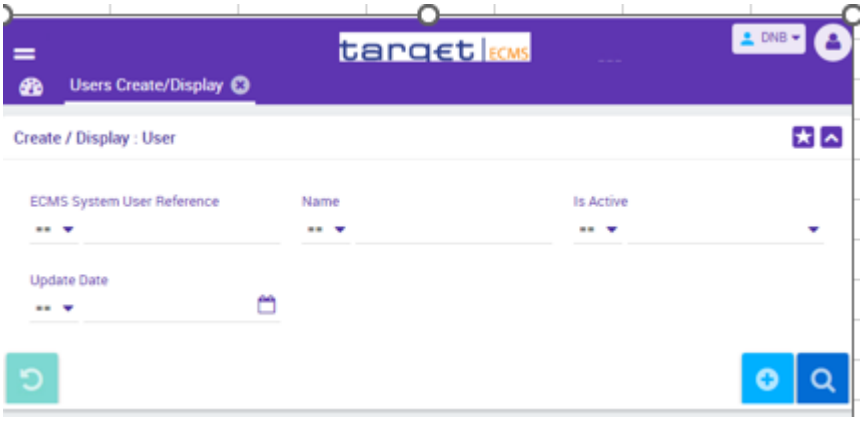
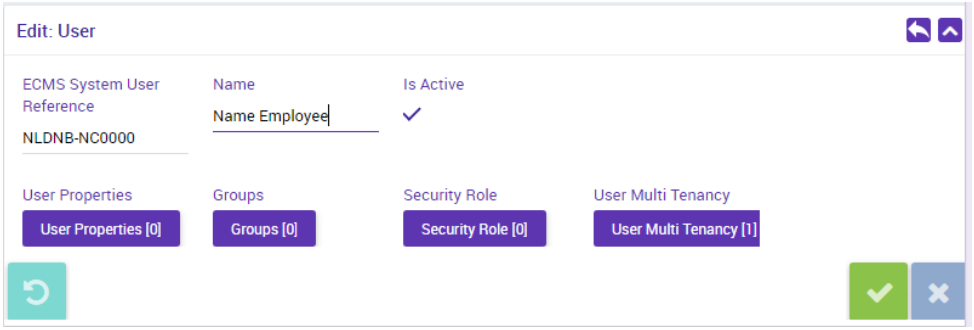


Step 4: Select the blue "+/Create" button, which will open an editor.



Step 5: Fill in the "ECMS System User Reference" and the "Name" of the User. Both are form free. Continue by setting up the "User properties" in Step 5a, and the Security role, or Groups in Step 5b and 5c respectively. We will first focus on adding individual roles, 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.



Step 5a (assigning user properties): In order to set up the "User properties", one needs to configure the "DN" (Distinguished Name) and "Data Scope".

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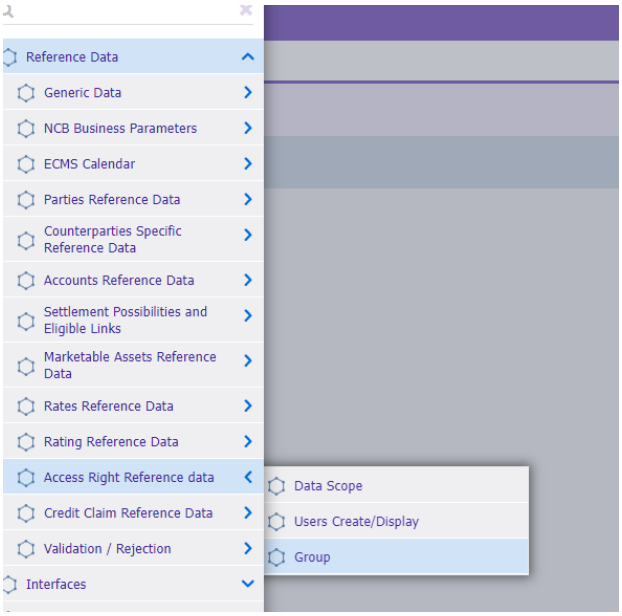
This can be done by selecting on the "User Properties" and then selecting the button. Continue by selecting "DN" from the "Property" drop down menu. Wait for 3 seconds and enter the DN in "User Property Value". Please note that this field is sensitive to the correct use of capital letters, spaces and commas. To confirm, select the button.

Continue by, again, selecting the button, and from the "Property" drop down menu, select "Data Scope". Select 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 the button and Save.

Step 5b (assigning security roles):
In order to assign security roles to a user, one ought first to use the search button Search to find the user, and then select the user and press Edit. A screen will open underneath the search results, then select Security Role, and underneath the "List: Assigned Roles" will open. 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 there exists a drop-down menu, and the different kinds of roles can be found. Then click on the back button, and confirm using the Save button in the "Edit: User" screen. A confirmation pop-up appears, and if you want to save this role, select "Yes". If successful, you will receive a success pop-up. Note that every user must have a validator/super validator role assigned.

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.

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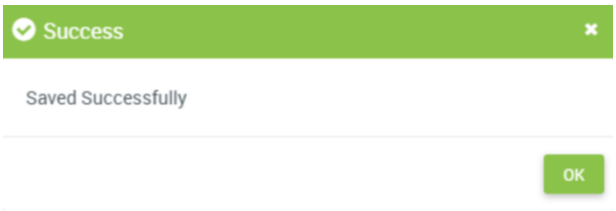
Then select "Group Properties", and "Edit: User Properties" will open. Press Create. Then Select from User property value the record that includes the RIAD code of your institution (Example: "Example Default_9|NL001|DNB1"). Press the back button.

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.



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.

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

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