



MIDCLEAR ONLINE USER GUIDE (Administrator Guide)

Outline

- 1. Administrators Registration**
- 2. Branch Maintenance**
- 3. Creating Users**
- 4. User Maintenance**
- 5. User Groups**
- 6. Assign Menu Items to Groups**
- 7. Assign Users to Groups**

Appendix 1 - Letter of Assignment

1. Administrators Registration

To be able to use the midclearonline website, each member must assign a maximum of two administrators, with a minimum of one. The assigned administrator(s) must create users. These users are able to use the services offered by the website. In order for us to validate each member's administrator(s), a "Letter of Assignment of Participant Administrator(s) to MidclearOnline" (see Appendix 1) must be filled and duly signed by authorized signatories.

If desired a demo or training session can be arranged.

After signing the attached letter of assignment, each administrator should register at <https://www.midclearonline.com.lb/registration> using the following form.

The image shows a registration form for administrators. The form fields are as follows:

- User ID / email: Text input field with a callout: "These two fields must be valid email addresses. They can not be Hotmail, Gmail, Yahoo, MSN... The email must belong to the company's domain"
- User Type: Dropdown menu (User Administrator)
- Status: Dropdown menu (Active)
- First Name: Text input field
- Last Name: Text input field
- Password: Text input field
- Re-type Password: Text input field
- Member Code: Text input field
- Branch Code: Dropdown menu with a callout: "This field will be null upon registration because there is no branch created yet. Once the administrator is active he must declare branches for his institutions and start assigning branches to himself and the institution's users."
- Telephone No.: Text input field
- Fax No.: Text input field
- Building: Text input field
- Street: Text input field
- Region/Area: Text input field
- P.O.Box: Text input field
- City: Text input field
- Country: Dropdown menu (Select Country)
- BIC Code: Text input field
- Notify user on assignment of Personal Number: Radio buttons (Yes/No)
- Notify email on initial upload of orders: Text input field
- Submit button: Add

Midclear will check the registration details of each administrator and activate membership if everything is in order. Each administrator will be informed by Midclear of its membership status.

Administrators must log on to <https://www.midclearonline.com.lb> to create and maintain branches, users and user groups.

Midclear will check the registration details of each user and activate membership if everything is in order. Each user will be informed by Midclear of its membership status. Users must log in to <https://www.midclearonline.com.lb> to use the services offered by MidclearOnline.

2. Branch Maintenance

In the branch maintenance screen, the administrator can add/delete/modify branches and then assign users to these branches.

Member Branches

The screenshot shows a table with columns 'Branch Code' and 'Branch Description'. The first row has '1-0' and 'Hamra', and the second row has '00' and 'Head Office'. Each row has an 'Edit' link. Above the table is an 'Add New Branch' button. Callouts point to these elements: 'Add a branch' points to the button, 'Edit a record' points to the 'Edit' link in the second row, and 'Delete a record' points to the 'x' icon in the first row. A label '(Screen Branch 1)' is also present.

When a user clicks the “Add New Branch” button s/he is taken to the following screen in order to add a new branch code & description.

Member Branches

The screenshot shows a form with two input fields: 'Branch Code:' and 'Branch Desc:'. Below the fields are two buttons: 'Add' and 'Cancel'. A label '(Screen Branch 2)' is centered below the form.

After adding a new branch the system checks:

:: If all users for this member are assigned a branch then it returns to the previous screen, Screen Branch 1.

:: If there are users that are not assigned to a specific branch then it will be redirected to Screen Branch 3 (figure below).

User Branch

The screenshot shows a 'Branch Code' dropdown menu, a 'View All Users' button, and an 'Apply Branch to Selected Users' button. Below is a table with columns 'UserID', 'FirstName', 'LastName', and 'BranchCode'. The table contains three rows of user data. Callouts explain the functionality: 'List all branches for this member. Once a branch is chosen it loads in the grid all users that are in the selected branch.' points to the dropdown; 'Apply the selected branch code to all checked users.' points to the 'Apply Branch to Selected Users' button; 'Once clicked it brings all users for this member disregarding if they are assigned to a branch or not.' points to the 'View All Users' button; and 'In order to select them, the administrator checks the users that he wants to assign to the Branch in the List Box' points to the checkboxes in the table. A label '(Screen Branch 3)' is centered below the table.

3. Creating Users

User Maintenance

Search by UserID or First & Last Name:

User ID	First Name	Last Name	Created By	Status				
				A	Reset Password	Deactivate	Modify	Delete

This grid shows a list of users created by the administrators of the institution. This grid does not show the administrators of the institution. It shows users only after being activated by Midclear.

Clicking on this button will open a form to register a new user. (See Section 4. User Maintenance)

4. User Maintenance

N.B. Administrators should have declared their institution's branches before start creating users. Because the field branch code in the following picture is mandatory.

User Maintenance

User ID / Email

First Name

Last Name

Password

Retype Password

Member Code

Branch Code

Telephone No.

Fax No.

Should be a valid email address that belongs to the institution.

Branch Code is Mandatory

5. User Groups

The administrator has full right on the system. He is allowed to see all the menu items in MIDCLEAR online. One of the roles of administrators is to organize their users into groups. Because rights on MIDCLEAR online are given per group and not per user (following a role based security pattern). So users should be organized into groups and menu items are assigned to the groups.

User Groups

Group: Description

	Group ID	Group Name	
x	37	CA Full Access	Edit
x	38	CA Branch Data Entry	Edit
x	39	CA Agent Approval	Edit

Enter the name of the group and click Add.

Edit the group description

Delete the group

6. Assign Menu Items To Groups

Assign Menu Items to Users Groups

Users Groups

- Menu items access
 - Shareholder Numbers
 - Shareholder Enquiry
 - Branch Maintenance
 - User Maintenance
 - CA
 - Shareholder Enquiry
 - Request Temporary Number (FULL)
 - View Permanent Numbers
 - Family Relations
 - View Family Relations
 - CA Subscriptions
 - Branch Supervisor Approval
 - Agent Supervisor Approval
 - Issuer Approval
 - Corporate Actions
 - Edit Profile

This combo box contains all groups created (in Appendix 2 Section 2. User Groups) by the administrator.

The administrator starts assigning menu items to the groups by checking the check box at the left of each menu item and he can remove a an item from the group by un-checking the check box.

7. Assign Users to Groups

Assign Users to Groups

Member Groups:

Combo box contains all groups that the administrators have created. (See Appendix 2 section 2. User

Member Users:

Select/UnSelect	User ID	User Type	Name
<input checked="" type="checkbox"/>	Admin 1@Company.com	UA	Admin Admin 1
<input checked="" type="checkbox"/>	Admin 2@Company.com	UA	Admin Admin 2
<input type="checkbox"/>	User1@Company.com	U	User User

This grid will show all users in the institutions be it an administrator or normal user.

After selecting the group the administrator will start to check checkbox if he wants the corresponding user to be in the selected group or un-check the checkbox if he wants to remove the user from the selected group.

Appendix 1

<Letter Head of Financial Institution or Bank>

Letter of Assignment of Participant Administrator(s) to MidclearOnline

I the Undersigned, <Name of Individual> acting as <chairman, general manager, etc.> at <Name of Financial Institution or Bank>, hereafter called the "Participant",

Declare having subscribed to the MidclearOnline services of Midclear S.A.L.

The Participant hereby assigns the following individual(s) (maximum of two) as administrator(s) acting on its behalf with respect to its users on the MidclearOnline website:

First administrator:

Email Address:

First Name:

Last Name:

Member Code:

Telephone No. and Ext.:

S.W.I.F.T. BIC Code, if available:

Second administrator:

Email Address:

First Name:

Last Name:

Member Code:

Telephone No. and Ext.:

Each administrator should register at <https://www.midclearonline.com.lb/registration>.

Midclear will check the registration details of each administrator and activate membership if everything is in order. Each administrator will be informed by Midclear of its membership status.

Administrators must log in to <https://www.midclearonline.com.lb> to create users.

Midclear will check the registration details of each user and activate membership if everything is in order. Each user will be informed by Midclear of its membership status.

Users must log in to <https://www.midclearonline.com.lb> to use the services offered by MidclearOnline

<Signature, Stamp and Date>.