

## Terminal Operations

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**FUNCTION NAME:                   USER PROFILE MAINTENANCE**

**WHEN TO USE:**

- For a delegated administrator (DA) to change, delete or enquire a user profile.

**AVAILABLE MAINTENANCE FUNCTIONS:**

- A. Change User Profile  
To amend the details of a user profile.
- B. Delete User Profile  
To delete a user profile.
- C. Enquire User Profile  
To make enquiries on the details of a user profile.

**AVAILABLE FUNCTION TIME:**

- The functions must be performed between 7:00 a.m. and 7:00 p.m. Monday to Friday, and between 7:00 a.m. and 1:00 p.m. Saturday (except holidays).

**FUNCTIONAL DESCRIPTIONS:**

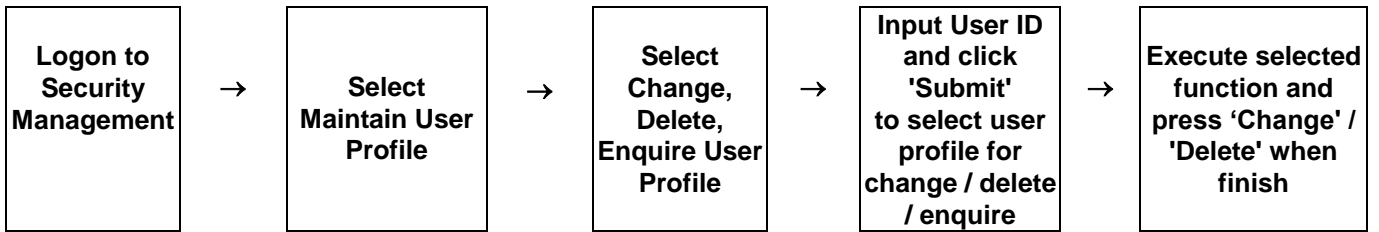
- CCASS will assign a user ID and a smartcard for each DA of a participant.
- The DA can change and delete users, other than the DAs, of the participant.
- The DA of the participant can use the "Change User Profile" function to input the appropriate details of the users and assign the authority to the users.
- New user groups added to a user profile will be effective after two hours.
- The DA can use the "Change User Profile" function to enable or disable user profiles.
- The DA can use the "Delete User Profile" function to delete user profiles.
- The participant has to return the smartcards to HKSCC for assigning other user IDs to smartcards when the smartcards are reused.
- The DA can use the "Enquire User Profile" function to enquire the user profiles of all the users of the participant.
- For Change User Profile and Delete User Profile, after the maker has completed the input, the checker has to input the checker ID and authorisation code to effect the changes.
- The user ID of the maker will be disabled after three accumulative failures by the checker to input the checker ID and authorisation code.

**Section 8.4.1**  
User Profile Maintenance

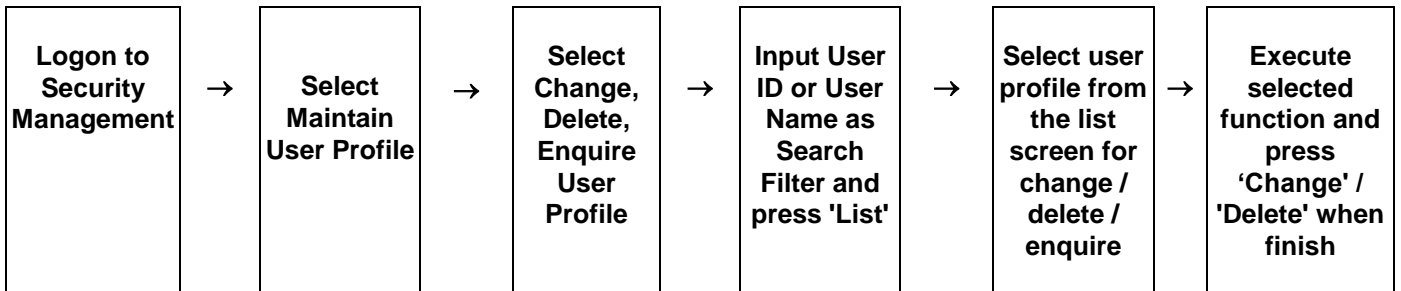
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The access paths for user profile maintenance function are:

**A. Attempt by direct input of User ID**



**B. Attempt by selection from list screen**



USER PROFILE MAINTENANCE – Sample Screen:

**Maintain User Profile** | **User Profile** | [Print](#) | [Site Map](#) | [Logout](#) | [Change Password](#) | **DUPC 01**  
**13-May-02 14:17:18**

**Change User Profile - Prompt**

**User ID**

**Search by**  **User ID**  **User Name**

**Search filter**

[Help](#)

**Maintain User Profile** | **User Profile** | [Print](#) | [Site Map](#) | [Logout](#) | [Change Password](#) | **DUPC 02**  
**13-May-02 14:32:02**

**Change User Profile - List**

**Search by** **User ID**

**Search filter** **B0080199**

| User ID         | User Name            |
|-----------------|----------------------|
| <b>B0080199</b> | <b>B0080199 USER</b> |

[Help](#)

# Section 8.4.1

## User Profile Maintenance

- Maintain User Profile
- View Listings
- View Reports
- Reset Smartcard Pwd

User Profile [Print](#) [Site Map](#) [Logout](#) [Change Password](#)

DUPC 03  
13-May-02 14:32:08

**Change User Profile - Detail**

|                               |  |
|-------------------------------|--|
| <b>User ID</b>                | B0080199   |
| <b>User Status</b>            | <input checked="" type="radio"/> ENABLED<br><input type="radio"/> DISABLED |
| <b>Surname</b>                | <input type="text" value="CHAN"/>  |
| <b>Other names</b>            | <input type="text" value="TAIMAN"/>  |
| <b>Enable from</b>            | <input type="text"/> DD-MMM-YY   |
| <b>Disable after</b>          | <input type="text"/> DD-MMM-YY   |
| <b>Clearing House Options</b> | <input type="text" value="Cash"/>  |

Transaction limit (HKD)

|                                    |  |
|------------------------------------|--|
| <b>Default</b>                     | <input type="text" value="0.00"/>      |
| <b>DI</b>                          | <input type="text" value="1,000,000"/> |
| <b>ISI</b>                         | <input type="text"/>                   |
| <b>Cash Compensation Indicator</b> | <input type="text"/>                   |
| <b>Cash Prepayment</b>             | <input type="text"/>                   |

|                       |  |
|-----------------------|--|
| <b>DI Requirement</b> | <input type="text" value="1,000,000"/> |
| <b>Recall Request</b> | <input type="text"/>                   |
| <b>ATI</b>            | <input type="text" value="500,000"/>   |
| <b>SI</b>             | <input type="text" value="100,000"/>   |

Selected User Groups

|   |
|---|
| A |
| C |
| D |
| E |
| F |
| G |
| H |

<<  
>>

Available User Groups

|   |
|---|
| H |
| I |
| J |
| K |
| L |
| M |
| N |

**DESCRIPTION OF FIELDS:**

| <b><u>Field</u></b>            | <b><u>Description/Format</u></b>  |
|--------------------------------|---|
| User ID                        | - the user ID of the user.  |
| Search By                      | - for specifying the type of the search. Click either 'User ID' or 'User Name' to specify the desired search filter.  |
| Search Filter                  | - input a specific User ID or User Name to search for user profile that matches with the search filter.<br>- input * to search for all records.<br>- default value of the field is *.   |
| User Name                      | - the user name of the user.  |
| SRN (for user using smartcard) | - Subscriber Reference Number of the user's smartcard.  |
| User Status                    | - Select 'Enabled' if the user profile is to be effected immediately.<br>- Select 'Disabled' if the user profile is to be disabled.   |
| Surname                        | - the surname of the user.  |
| Other Names                    | - the other names of the user.  |
| Enable From                    | - if a date is input and the user status is 'Enabled', the user profile will be enabled from the date.<br>- if the field is blank and the user status is 'Enabled', the user profile will be effective after execution until the 'Disable after' date.  |
| Disable After                  | - if a date is input and the user status is 'Enabled', the user profile will be disabled after the date.<br>- if the field is blank and the user status is 'Enabled', the user profile will be effective after execution immediately or from the 'Enable from' date.  |
| Clearing House Options         | - For determining whether the user is a CCMS user, and if yes, whether the user is a global level or participant-level user.<br>- Can only select between "CASH" and "NONE" in the initial launch of CCMS.<br>- Select "CASH", if user required to access any of the CCMS on-line functions, CCMS reports (via Report Download or Overnight Report Distribution) and/or CCMS related broadcast messages.<br>- Select "NONE", if user is not allowed to access CCMS related information. |

**Section 8.4.1**  
**User Profile Maintenance**

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| <b><u>Field</u></b>  | <b><u>Description/Format</u></b>  |
|--|---|
| Access Channel   | <ul style="list-style-type: none"> <li>- For enquiry only. Input is not allowed.</li> <li>- 'C3T' for CCASS/3 Terminal.</li> <li>- 'PG' for Participant Gateway.</li> </ul>   |
| Transaction Limit (HKD) <ul style="list-style-type: none"> <li>- Default</li> <li>- DI / ISI / Cash Compensation Indicator / Cash Prepayment / DI Requirement / Recall Request / ATI / SI</li> </ul> | <ul style="list-style-type: none"> <li>- the transaction limit will apply for DI / ISI / Change Cash Compensation Indicator / Cash Prepayment / Change DI Requirement / Recall Request / ATI / SI functions if there are no specific transaction limits set for the functions.</li> <li>- if the user inputs a transaction above the transaction limit, the transaction would need a checker to authorise.</li> <li>- the transaction limit of the respective function. This transaction limit will supersede the default transaction limit.</li> </ul> |
| Selected User Group  | <ul style="list-style-type: none"> <li>- the user groups selected to be assigned to the user.</li> <li>- highlight the user groups and click the "&gt;&gt;" button to remove the user groups from the selected groups.</li> </ul>   |
| Available User Group   | <ul style="list-style-type: none"> <li>- the user groups not yet selected to be assigned to the user.</li> <li>- highlight the user groups and click the "&lt;&lt;" button to add the user groups to the selected group.</li> </ul>   |