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INTRODUCTION

The purpose of the Security Services Administration Guide for Tax Reporting Online (TRO) is to assist Client Masters and/or Client Administrators with the setup and administrative management of users for website access to authorized products, services, or applications. This guide provides general information on site features as well as procedures for performing administrative functions through Netsecure and the Security Services Administration application.

General Overview

One company-appointed Client Master is set up by ADP, and one or more Client Administrators (per company) is set up by the Client Master. Client Administrators typically handle the administrative tasks for users. During the setup through Netsecure, your company’s Administrator assigns the profile, and the system issues a digital certificate to the designated user.

To complete the process, the Client Administrator must also access the Security Services Administration application through Tax Reporting Online and assign/authorize users with specific roles and entitlements to access products, services, or applications.

An enrollment e-mail is sent to the user with instructions for registering and downloading the digital certificate. The user registers, creates a password, and downloads the digital certificate to their computer. With the registered digital certificate, the user now has a secure single point of entry to access Netsecure and authorized products, services, or applications.

Security Tips

♦ Use caution when making decisions about user authorizations. User administrative or application roles as well as entitlement decisions should come from management.
♦ Never share your password with anyone or make it easy for someone to guess.
♦ Keep your account active. User accounts without a login for 180 days or more will have their ADPFACS product profile access removed.
System Requirements

Microsoft Windows\(^1\) XP Professional, Windows Vista, or Windows 7 (MAC operating systems are not supported.)

- Internet Explorer\(^1\) Version 7, or 8 set to accept third party cookies or Firefox 3.5 or higher
- Adobe Acrobat Reader\(^2\) 5.0 or higher
- Browser Security set to Medium with JavaScript, ActiveX controls, and plug-ins enabled
- (JRE 1.5.0* or higher for Java\(^3\) Applet functionality)
  *If your workstation does not meet the minimum Java Runtime Environment (JRE) 1.5.0 requirement, please contact your internal workstation support department. Your support person can visit the following Website to download the necessary JRE: [http://www.oracle.com/technetwork/java/javase/downloads/index.html](http://www.oracle.com/technetwork/java/javase/downloads/index.html)
- 640 x 480, 256-color screen resolution or higher
- 56K modem or higher (DSL/Cable, T1 line, ISDN recommended)

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\(^2\)Adobe® Acrobat® Reader® are trademarks of Adobe Systems Incorporated

\(^3\)Oracle and Java are registered trademarks of Oracle and/or its affiliates
**Important Administrator Terms**

The following terms are used when addressing roles and functions within the Netsecure Website and the Security Services Administration application.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Certificate</td>
<td>Issued by a certificate authority (CA), a digital certificate is an electronic credential that authenticates a user on the Internet and/or Intranet. Digital certificates ensure the legitimate online transfer of confidential information, money, or other sensitive materials by means of public encryption technology.</td>
</tr>
<tr>
<td>Password Policy</td>
<td>Passwords must be a minimum of eight alpha/numeric characters with at least one numeric. Passwords are case sensitive and all special characters on a standard keyboard are acceptable. Passwords must not contain the word &quot;password,&quot; a user's user ID, full SSN/EIN, full last name, or more than four sequential characters in a row. You cannot reuse your previous four passwords.</td>
</tr>
<tr>
<td>Role Authorizations</td>
<td>A role that determines what the user may access. The roles and their appropriate permissions are listed below.</td>
</tr>
<tr>
<td>Client Admin</td>
<td>User with Security Administrator access to create and update additional company user’s access to Security Services Administration application.</td>
</tr>
<tr>
<td>External Viewer</td>
<td>User who has access to view security information only.</td>
</tr>
<tr>
<td>Client User</td>
<td>User who has access to all tax reports on Tax Reporting Online.</td>
</tr>
<tr>
<td>Secret Question and Answer</td>
<td>A security question and answer created to enroll for the Netsecure digital certificate registration. Answers must be at least four characters long, excluding special characters. The answer may not have four or more sequential or identical characters in a row.</td>
</tr>
<tr>
<td>Client Master</td>
<td>Allowed to create, modify, and delete users; create an application role; modify passwords; generate all reports; and assign and remove users to/from the administrative role. A Client Master can only be set up by ADP.</td>
</tr>
<tr>
<td>Security Role</td>
<td>Product User - User who has access to various applications and reports but does not have any administrative rights</td>
</tr>
<tr>
<td></td>
<td>Client Admin - User with permission to add, change, and delete User IDs.</td>
</tr>
<tr>
<td>User Application Report</td>
<td>A report that displays assigned roles and authorization levels. Report includes date of assignment.</td>
</tr>
<tr>
<td>User Company Report</td>
<td>Displays all assigned roles and authorization levels for all company site IDs.</td>
</tr>
<tr>
<td>User ID</td>
<td>A unique name that allows a user to log on to ADP Internet Services.</td>
</tr>
<tr>
<td>User Profile</td>
<td>The user access set up for various products or selections on Netsecure or Security Services Administration.</td>
</tr>
</tbody>
</table>
**NETSECURE WEBSITE**

The Netsecure Website is initially used by the Client Master and/or Client Administrator to set up users with digital certificates to access authorized ADP Internet Services. Netsecure also functions as an administrative management tool where you can delete users, modify profiles, reissue digital certificates, reset passwords, and obtain reports. Product users only have Netsecure access to manage their personal contact information, security questions and answers, and change their password.

**Registration**

ADP will set up one Client Master for your company. If you are the Client Master, please provide the same registration enrollment information to your ADP Solution Center Consultant that you will request from your company’s users. The setup steps are the same for all users.

The Client Master should first set up one or more Client Administrators who can also manage users and maintain the database. A Client Administrator can be considered a back-up in the absence of the Client Master; or for some, Client Administrators are responsible for setting up and managing users as needed. The Client Master or Client Administrators are authorized to add/delete users, modify profiles, reset passwords, and reissue digital certificates.

**NOTE:** A Client Master can set up Client Administrators, but Client Administrators cannot set up another Client Master or Client Administrator. If your company requires more than one Client Master, contact your ADP Solution Center Consultant.

The following information is required to set up users and issue digital certificates through Netsecure:

- First and last name
- E-mail address
- Work telephone number, if different from the main company phone number
- Work address, if different from the main company address
- Security question and answer

Please answer **one** of the following questions. This will be used during your online registration as an additional level of security. Answers must be at least four characters long, excluding special characters. The answer may not have four or more sequential or identical characters in a row.

1. What was your childhood nickname that most people do not know?
2. In what city was your mother born? (Enter full name of city only)
3. In what city was your father born? (Enter full name of city only)
4. What is the first and last name of your childhood best friend?
5. What is the first and last name of your maternal grandfather? (Your mother’s father)
6. What is the first and last name of your paternal grandfather? (Your father’s father)
7. What was the name of your first pet?
8. What was the first and last name of your maid/matron of honor at your wedding?
9. What was the first and last name of your best man at your wedding?
10. What is the first and last name of your oldest niece?
11. What is the first and last name of your oldest nephew?
12. What was the first and last name of your first manager?
13. What was the first and last name of your first girlfriend/boyfriend?
14. What was the last name of your favorite teacher in your final year of school?
15. What was the first concert you attended?
16. What was the first foreign country you visited?

◆ What profiles will be assigned?

Once a user is set up, a confirmation message containing the User ID, Access Code, and the URL for registering to download a digital certificate will arrive via e-mail. The user will use the e-mail instructions to register and download the digital certificate to their computer, which is required to access Netsecure and authorized products, services, or applications.

For users who are not Client Masters or Client Administrators, refer to the Tax Reporting Online User’s Guide.
Register a Digital Certificate

Digital certificates authenticate the user each time an authorized ADP Internet Services site is accessed.

After you have been set up through Netsecure, an e-mail is sent to you with instructions to register and download the digital certificate to your computer. The digital certificate will only need to be downloaded once to your computer before you can log in to Netsecure or Tax Reporting Online for the first time. You can only access authorized sites on this computer with your digital certificate.

The digital certificate is valid for two years. An e-mail notification is sent to you 60 days before the expiration date with instructions for renewing the digital certificate.

**NOTE:** If this computer is shared by users, more than one digital certificate can be downloaded to the same computer.

1. Open the e-mail received from ADP Internet Services.

   **EXAMPLE**

   ```
   This e-mail has been sent from an automated system. PLEASE DO NOT REPLY. If you have any questions, please contact your administrator for assistance.
   Welcome! You have been enrolled in an ADP Internet Service.
   To access ADP's internet services, you will need a digital certificate. To download the certificate, follow the instructions below.
   
   Sally JonesXXX1Admin - User Credentials
   
   User ID = SJonesXXX1AdminTest1
   Access Code = OrXVuxx
   Personal Challenge Phrase = This is the secret question and answer that you gave to the security administrator when you enrolled
   
   Instructions
   1. Open your browser.
   2. Copy the following URL, paste it into the Address field of the browser, and then click Go. https://netscure.example.register
   3. Copy your User ID and Access Code from above and paste them into the registration screen.
   (NOTE: Remove any spaces before or after the User ID and Access Code.)
   4. Follow the instructions on the site.
   ```

2. Select and **Copy** the URL from the e-mail and **Paste** it into the browser Address field. Click **Go**.
3. The following Potential Scripting Violation may display. Click Yes to continue.

![Potential Scripting Violation](image)

**IMPORTANT!** If alert dialog boxes display during this process due to the digital certificate, click Yes in all instances to proceed.

4. The Register for ADP Services page displays. Copy the User ID and Access Code from the confirmation e-mail and Paste each in the applicable fields on the registration page. Make sure you do not copy any extra spaces. Click Submit.

![Register for ADP Services](image)

5. Select the designated security question and enter the answer that you provided for enrollment. Click Submit.

![Register for ADP Services](image)
6. Enter a new password for your account. Confirm the password in the next field.

   Password rules are as follows:
   - Passwords must be a minimum of eight alpha/numeric characters with at least one numeric. Passwords are case sensitive and all special characters on a standard keyboard are acceptable.
   - Passwords must not contain the word “password,” a user’s user ID, full SSN/EIN, full last name, or more than four sequential characters in a row.
   - You cannot reuse your previous four passwords.

   For added security, your password will expire after six months. When your password expires, you will be prompted to create a new password when you log in. Your new password will be effective immediately.

7. Click **Submit**.

8. A Potential Scripting Violation dialog box may display. Click **Yes**.
9. The ADP Digital Certificate Download Process page displays. Read the information and complete the tasks as applicable. Click **Download Certificate** to download your digital certificate. (The example shown below may differ slightly. Additional operating system or internet browser procedures are available in the Digital Certificate Download Quick Reference Card.)

**NOTE:** If you need additional information for downloading your digital certificate, please click the **Digital Certificate Download Quick Reference Card** link on this page to access the document.

<table>
<thead>
<tr>
<th>ADP Digital Certificate Download Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>During this process, you will receive a few security alerts while downloading your digital certificate. When prompted consider ADP to be a trusted website and click <em>Yes</em> to continue the process to add the certificate to your machine.</td>
</tr>
</tbody>
</table>

**• Install ActiveX**

Depending on your computer setup, you may see a warning message in the Information Bar.

To display the hidden contents of the page, do the following:

1. Click on the *warning message* in the Information Bar.

2. Click the *Allow Blocked Content* option.

3. In the Security Warning window, click *Yes*.

Complete the tasks listed on this page and click **Download Certificate** to begin downloading your digital certificate.

**Important:** The digital certificate permits access only on the computer where it is installed. If you expect to access ADP services from a different computer, then follow the instructions to export and import the digital certificate. Refer to the **Digital Certificate Download Quick Reference Card**.
10. A confirmation message displays. You are now ready to access Netsecure and authorized products, services, or applications. Close the window to exit.

---

**Digital ID Services**

[Image: VeriSign Logo]

Congratulations! Your Digital ID has been successfully generated and installed.

To log on and access your ADP services website to perform your administrative tasks, do the following:

1. Go to the welcome page of your ADP service and click **Login**.

2. In the Choose a Digital Certificate window, select your digital certificate and click **OK**.
   
   **Note:** Your certificate is labeled with your first name, last name and its expiration date, with the issuer “Automatic Data Processing...”

3. In the Connect window, enter your user ID, password and click **OK**.

---

**Account Inactivity**

Keep your account active. Accounts are audited by ADP Data Security for inactivity to Tax Reporting Online (Product Profile: ADPFACS). During these audits, user accounts without a login for 180 days or more will be reviewed for deactivation. Deactivation may delete the user account completely if ADPFACS is the only product assigned. If more than one ADP product is assigned to the user account, the ADPFACS product assignment is removed, the user account remains active, and other product assignments will not be affected.

If access to Tax Reporting Online is required at a later date, user accounts that have been deleted must be setup as new by the Client Administrator. For active Netsecure user accounts that the ADPFACS product assignment was removed, the Client Administrator can access the Netsecure Website to add the product back to the Assigned Profiles for the user. (See the Add or Remove Profiles section for details.) If the Client Administrator is unavailable or additional assistance is required, please contact your ADP Solution Center Consultant.

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Access Netsecure

The Netsecure Website provides administrative functions to manage ADP Internet services for company users. Information in this section provides a basic overview of commonly used functions. More detailed information to assist you can be found in the job aids provided on the Netsecure Website through the Resources link located on the Homepage.

To access Netsecure, enter https://netsecure.adp.com into the browser Address field. Click Go.

1. From the Welcome page, click the login link.

2. A Security Alert dialog box may display. Click Yes to continue.
3. An identification dialog box displays and lists any digital certificates on this computer. Click to highlight the appropriate digital certificate, and click **OK**.

4. A connection dialog box displays. Enter your **User Name** and **Password**.

- **User Name** is the User ID that you copied to the ADP Internet Administrator Registration from the confirmation e-mail.
- **Password** is the password that you created and confirmed on the ADP Internet Administrator Registration.

**NOTE:** For additional security, the choice to “Remember my password” is not an available option.

5. Click **OK**. The Netsecure homepage displays.
Set Up a New User

The Client Master first sets up one or more Client Administrators for assistance with managing users and/or for back-up purposes. Thereafter, the same process is used to set up each additional user. (ADP is processing a version conversion; the examples shown may differ slightly depending on the Netsecure version installed.)

**IMPORTANT!** The steps described in this section to add a user includes a temporary migration link to the Security Services Administration application; however, the Security Services Administration application is usually accessed directly through Tax Reporting Online.

1. To set up a new user, click **Add User** from the Netsecure homepage.

2. The Add User > Enter User Info page displays. Enter the first name, last name, and email address of the new user in the appropriate fields.

3. Select **None**.

4. Click **Next**.

---

![Add User Page](image_url)
5. Select the following **User Type**:
   - User is an independent contractor, consultant, offshore associate or another type of person and will not be included in your ADP services.

6. Select one of the following for the **User Role**:
   - **Product User** - Use this role to set up users who will work with various applications, but will not have administrative rights.
   - **Security Administrator** - Use this role to set up additional users or as an administrative back-up.

**NOTE:** The User Admin or User Master role is for Self-Service Users only. Do not select these roles for ADPFACS products.

7. Click **Next**. The View ADP Services User ID page displays.
8. Review the name and user ID information. Enter an alternative Email address, if applicable. Select the **Temporary Security Question** and enter the **Temporary Security Answer**. (This question and answer was determined in advance with the new user.)

<table>
<thead>
<tr>
<th>Add User</th>
<th>Find User</th>
<th>ADP Test Co</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add User**

![Add User Form](image)

**View ADP Services User ID**

User has been created with the user ID provided below.

**User ID:** JJackson@Test

An e-mail with the security information and the instruction to access ADP services will be sent to the email address provided below.

**Note:** To send this e-mail to an alternate e-mail address, enter it in the field below.

**Email Address:**

**Select Security Information**

Select the security question and enter the security answer.

**Note:** Security answer must be at least 4 characters long.

* required

- **Security Question**
  - What was your childhood nickname that most people do not know?
- **Security Answer**
  - Sweets

Provide this information to the user immediately and in a secure communication, either in person, by phone or e-mail. User must change this information after logging on to their ADP service.

9. Click **Submit**. The View User Info page displays.
10. A confirmation message displays at the top of the View User Info page. The user has been assigned a digital certificate and will receive an e-mail confirmation message.

To provide administrator access for this user to ADP services, click the Assign a Profile link. (This will determine user access.)

**NOTE:** This completes the process to issue a digital certificate. Skip the next steps if you are creating this user, but are not ready to assign a profile; however, you must assign a profile for a user to have access.
11. The Assigned Product Profiles page displays. Highlight the selection and click the double arrows button to add the product to the user.

12. Continue this process until all applicable profiles have been assigned for this user. Click Save Changes.

13. If you selected the ADPFACS product, an Assign Profiles dialog box displays. Click the Click here NOW to register for ADP Financial and Compliance Services link. This opens a new window to the Security Services Administration application to complete the setup for this user.

If you are not ready to assign the user role authorizations, click Continue to return to the Netsecure Website.
Security Services Administration

The setup continues for this user as the Client Master or Client Administrator is directed to the Security Services Administration application.

- If this setup is a current ADPFACS user who is assigned with role authorizations, follow instructions for Step 1 to map the digital certificate to this user.
- If this setup is for a user who has never been authorized for ADP Internet Services, skip Step 1 and proceed to Step 2.

1. The User Admin - Migration page displays. Enter the User ID of this same user who is currently authorized to access Tax Reporting Online. (The User ID entered will be mapped with their existing role authorizations to the new digital certificate that was just issued.)

   **IMPORTANT!** The system may detect the User ID. As a result, one or more possible matches will display on this page. If there is a match, select the user and proceed to Step 2.

   ![User Admin - Migration](image)

2. Click **Save**.

3. The User Admin - Add page displays. Basic information from Netsecure automatically populates to the User Admin - Add page. The user should be established based on the task or tasks performed for your company. The following values should be considered:

   - **Full SSN** - Select **Yes** to show full social security number on reports. Select **No** to only display the last four digits of the SSN on reports.
   - **Full DDA** - Select **Yes** to show full ABA/DDA numbers on reports. Select **No** to only display the last four digits of the ABA/DDAs on reports. (Only users with full DDA entitlement can choose to view unmasked reports.)

   ![User Admin - Add](image)
- **E-mail Notifications** - Default is **No**. Select **Yes** to receive Quarter or Periodic e-mail notification of report availability.
- **Auto Company Code** - Default is **No**. Select **Yes** to enable the user to inherit all of the company codes under its domain.
- **Auto Report** - Default is **No**. Select **Yes** to enable the user to inherit all of the reports under its domain.

4. Role Authorizations further define the level of user access. Select the roles to be assigned to the user.

**Security Services Administration**

- **ClientAdmin** - User with Security Administrator access to create, maintain, and update additional company user’s access to Security Services Administration application.
- **ExternalViewer** - User who has access to view security information only.
- **Tax Reporting Online**
  - **ClientUser** - User who has access to all tax reports on Tax Reporting Online.

5. Once all role assignments are selected, click **Save**.

6. An Action successful message displays. Exit the window to return to the Netsecure Website.

7. Click **Logout** to exit.
Manage Users

The Netsecure Website is an administrative management tool.

Find User

1. From the Netsecure Website, click **Find User**. The Find Users page displays. Select User Name or User ID, and enter all or part of the name or ID. Select an option for the value entered to search (Starts With, Contains, or Exact phrase). Click **Search**.

2. The User Results page displays and lists all users found that match your search criteria. Click to select or choose an action.
Edit User Information

1. Use the **Find User** feature to display the Find User Results page. Click the **Name** or **User ID** link.

2. The View User Info page displays. The menu down the left side of the page contains various links to manage a user. To modify personal information for this user, click **Edit User Info**.
3. On the Edit User Info page, modify the user's information as needed. Click **Save Changes**.

![Edit User Info Form](image)

4. A confirmation message displays. Click **Close Window**.

**NOTE**: If you change a user's e-mail address, an informational message will be sent to the user's previous e-mail address.
Add or Remove Profiles

Profiles define what ADP product sites the user will be authorized to access. From this option, you can add or remove profile assignments for users.

1. Use the Find User feature to display the Find User Results page. Click the Choose an action drop-down arrow to view a menu of available actions that can be accessed directly from this page. Select Assign Profile.

2. To assign a profile, select the user name check box. Click Go.

3. Click to select the user. Click Next.
4. The Assign User Profiles window displays. Highlight the selection and click the double arrows button to add or remove the profile for the user. Once all profile updates have been completed, click **Next**.

5. A confirmation message displays and confirms that the profile assignment or removal was successful. Click **Continue**.
Reset a Password

A user will contact their Client Master or Client Administrator to reset their password. A Client Administrator can reset a password for another Client Administrator; however, ADP must reset a password for a Client Master. The process to reset a password is the same for all users.

1. Use the Find User feature to display the Find User Results page. Click the Choose an action drop-down arrow to view a menu of available actions that can be accessed from this page. Select Reset Password.

2. To reset a password, click the user name check box. Click Go.
3. A Reset Password message displays. Verify that the user's e-mail address is correct, and click **Reset Password**. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.

![Reset Password > Jim Jackson](image)

4. A confirmation message displays. Click **Close Window**.

![Reset Password has been successfully completed.](image)

A “Confirmation of Change” e-mail message will be sent to the user containing a temporary password. The user must log on and follow the on-screen instructions to change the temporary password. If the user does not receive the temporary password e-mail, please contact your LAN Administrator to ensure that your firewall can accept e-mails from your own company.
Reissue a Digital Certificate

Situations may occur when a user’s digital certificate needs to be reissued. For example, the user’s computer may have crashed, or the user may have been assigned to another computer.

1. Use the Find User feature to display the Find User Results page. Click the Choose an action drop-down arrow to view a menu of available actions that can be accessed from this page. Select Reissue Certificate.

2. To reissue a certificate, click the user name check box. Click Go.
3. A Reissue Certificate confirmation message displays. Verify that the user’s e-mail address is correct, and click **Reissue Certificate**. An e-mail with instructions for downloading a new certificate will be sent to the user. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.

![Reissue Certificate > Jim Jackson](image)

4. A confirmation message displays. Click **Close Window**.

![Reissue Certificate has been successfully completed](image)

A “Confirmation of Change” e-mail message will be sent to the user containing the information needed to download the new digital certificate. If the user does not receive the temporary password e-mail, please contact your LAN Administrator to ensure that your firewall can accept e-mails from your own company.
Suspend or Activate a User

A user may need to be suspended due to an extended illness or leave of absence. When the user returns, you must reactivate the user to allow access to ADP Internet Service products.

If a suspended user attempts to log in to Netsecure or an ADP Internet Service product, the user will receive an error message stating that they do not have access to that product.

When a user is reactivated, the user can log in to the products or services that were assigned with their original user ID and password. A reactivated user will not have to repeat the registration process.

1. Use the Find User feature to display the Find User Results page. Click the Choose an action drop-down arrow to view a menu of available actions that can be accessed from this page. Select Suspend or Activate.

2. The status of the user displays in the Status column. To suspend or reactivate a user, click the user name check box. Click Go. (The example shown is for Suspend.)
3. A Change Status message displays. Click **Confirm**.

4. A message displays to verify that the user has been suspended. The user’s status will update to display the current status. Click **Close Window**.
Delete User

The Delete User option allows you to delete a user profile for reasons such as termination or transfer.

1. Use the **Find User** feature to display the Find User Results page. Click the **Choose an action** drop-down arrow to view a menu of available actions that can be accessed directly from this page. Select **Delete**.

2. To delete a user, select the user name check box. Click **Go**.

3. A Delete User confirmation message displays. Click **Confirm**.
4. A message displays that the user has been deleted. The user’s status will be updated on the user page. Click **Close Window**.
Frequent Tasks

The Frequent Tasks option on the main Netsecure page allows you to quickly reset a password or reissue a certificate. You must have the User ID of the user to process changes using this function.

1. Click the Frequent Tasks drop-down arrow to view the menu and select a task. Click Reissue Certificate or Reset Password to process. (The example shown is Reset Password.)

2. Enter the User ID for the user password to be reset. Click Go.
3. A Reset Password message displays. Verify that the user’s e-mail address is correct, and click **Reset Password**. If it is not correct, click **Cancel** and return to Edit User Info to update the e-mail address.

A “Confirmation of Change” e-mail message will be sent to the user containing a temporary password. The user must log on and follow the on-screen instructions to change the temporary password. If the user does not receive the temporary password e-mail, please contact your LAN administrator to ensure that your firewall can accept e-mails from your own company.
Manage Company Information

Company information can be updated through the Netsecure Website.

**NOTE:** Access to manage company information varies by user and/or products.

Edit Company Information

1. Access the Netsecure Welcome page. Click your **Company Name** to display the View Info page.

![Netsecure Welcome Page](image)

2. The View Info page displays the basic information for your company including name, address, phone number, and contact e-mail. The menu down the left side of the page contains various links to manage company information. To edit information, click **Edit Info**.

![View Info Page](image)
3. On the Edit Info page, update basic company information. Click **Save Changes**. If no changes are needed, click **Cancel**.

4. A confirmation message displays. Click **Close Window**.
Manage Company Users

The Approve or Deny Users function may be used when new users are pending.

1. Click your Company Name to access the View Info page. Click Approve/Deny Users.

2. The Users Pending Approval page displays listing any users that are pending approval. Click the user name check box. Click Approve or Deny to approve or deny the user access to the Website.
Manage Client Administrators

Manage the assignment or removal of Client Administrators from a list of your company's registered users.

1. Click your Company Name to access the View Info page. Click Security Admin to quickly add or remove one or more users to the Client Administrator role.

2. A list of users for your company will display on the left with the current Client Administrators on the right. To add Client Admin users, click to highlight the user name and click the double arrows button to move the name to the Security Admin list. To delete Client Admin users, click to highlight the user name from the listing on the right and use the arrow to move the name over to the left. Click Save Changes.
Netsecure Reports

Netsecure Reports are designed to provide information about users registered for ADP Internet Services. Report types include:

- **User Information** – Lists basic user information and provides you with the ability to include fields as appropriate for your needs.
- **Self Service User Status** – Not used at this time.
- **Certificate User Status** – Lists users and the products associated with the users.
- **Certificate Expiration** – Lists all certificate expirations for users for a specific time period.

### User Information Report

1. Access the Netsecure homepage. Click **Reports**.

2. The ADP Netsecure Reports page displays. Select a **Report Name**.
3. Upon selection of the report name, the Generate Reports options display based on the report requested. Select from the following to customize your report:

Sort Options
- **Sort On** – Select the field to sort the report. The report can be sorted by User Name, User Status, Security Role, Date created, or Last logon date.

Qualifiers
- **User Status** – Report can be produced for only active users, only suspended users, or both. To select both, press and hold down the <Ctrl> key while clicking each status.
- **Security Roles** – Choose the Security role or roles that you want to include on the report. To select multiple roles, press and hold down the <Ctrl> key while clicking each role.
- **Select Fields** – Varies by report (i.e., Span dates)
- **Product** – Available Products and Selected Products
- **Report Format** – Comma Separated Values (.csv), Portable Document Format (.pdf), or Preview

![Netsecure Report Options](image)

- **= Required**
- **Report Name**: **Certificate User Status**
- **Sort on**: **User Name**
- **User Status**: **Active**
- **Security Roles**: **Security Admin**
- **Product**: **Available Products**: 
  - **Selected Products**: 
    - **ADP Financial and Compliance Services**
- **Report Format**: **Comma Separated Values (.csv)**

[Generate Report button]
4. Click **Generate Report** to produce the report in the format requested.

5. A File Download dialog box displays. The file name and type displays. To save a copy of the report on your local computer drive, click **Save**. Navigate to the desired local drive and name your file to save. To open the file, click **Open**.

![File Download dialog box](image)

**NOTE:** When PDF files are transferred to your computer, your browser may automatically store them as temporary files that could be at risk of being viewed at a later time. To prevent unauthorized access to recently viewed pages, be sure to delete your browser's temporary Internet files and close all browser windows after you are finished working with your report.
Netsecure Resources

Netsecure provides job aids to assist you with features and functions within Netsecure.

1. Access the Netsecure homepage. Click **Resources**.

![Netsecure Interface](image)

2. A Resources window displays. Click the appropriate link to access an Adobe Acrobat file with the specified documentation.

![Netsecure Resources](image)

3. Click **Close Window**.
My Account

My Account allows any user to update personal profile information and change existing passwords. (A forgotten password cannot be reset by a user. Only Client Masters or Administrators can reset passwords.)

**NOTE:** Manage My Services page is not currently in use.

1. Access the Netsecure homepage. Click *My Account* at the top of the page.

2. The Manage My Profile page displays. Your current Contact Information and Security Information displays. Enter updates as needed.

3. Click *Save*.
4. A confirmation message displays. Click **Close Window** or **Exit**.
My Account – Change My Password

Any user can update their password from the My Account page.

1. Access the Netsecure homepage. Click My Account at the top of the page.

2. The Manage My Profile page displays. Click Change My Password.
3. The Change My Password page displays. Enter your current password. Enter a new password and confirm the new password by entering it a second time. Click **Submit**.

   **NOTE:** If a Security Alert dialog box appears, click **Yes** to continue.

4. A confirmation message displays. The new password is effective immediately. Click **Exit** to return to the main page.
Log Out of Netsecure

1. To exit completely from Netsecure, click **Logout**.

2. A confirmation message displays. Click **Close Window**.
The Security Services Administration application is accessed from Tax Reporting Online. The Client Master and/or Client Administrator manage user authorizations to the website from the Security Services Administration application. From the Security Services application, you can set up or change user access authorizations, including application roles, company codes, and reports.

1. Access the Tax Reporting Online application.

2. To access the Security Services Administration application, click the Select application link to open the Available Applications drop-down menu.

3. Click the Security Services Administration link. The Security Services Administration Homepage displays.
User Admin

The User Admin section provides maintenance options for user entitlements.

Find User

1. From the tabs across the top of the page, click User Admin, or click the User Admin link.

2. The User Admin page displays. User search can be done by iSI User ID, user first name, or user last name. Enter a full or partial value in the desired field and select an option for the value entered to search (Starts With, Contains, or Exact phrase). Click Search.
A listing of matching users will display at the bottom of the page and will include the ISI Client ID, ISI Client Name, User ID, First Name, and Last Name associated with the user. Links to the right of the page provide access to modify the user information, access company codes, or access reports.
View User

Selected options and role assignments are available for viewing on a user level.

1. To view the user assignments, click the **User ID** link from the User Admin page.

2. The User Admin – View page displays basic information entered in Netsecure as well as the assignments that have been set up. Click **Cancel** to return to the User Admin page.
Modify Existing User

1. To modify user information, click the **Modify** icon link from the User Admin page.

2. The User Admin - Modify page displays. To modify an existing user profile, select the new values based on the task or tasks they will be performing for your company. From the User Admin - Modify page, select the new or changed information as follows:

   - **Full SSN** - Select **Yes** to show full social security number on reports. Select **No** to only display the last four digits of the SSN on reports.
   - **Full DDA** - Select **Yes** to show full ABA/DDA numbers on reports. Select **No** to only display the last four digits of the ABA/DDAs on reports. (Only users with full DDA entitlement can choose to view unmasked reports.)
   - **E-mail Notifications** - Default is **No**. Select **Yes** to receive Quarter or Periodic e-mail notification of report availability.
   - **Auto Company Code** - Default is **No**. Select **Yes** to enable the user to inherit all of the company codes under its domain.
   - **Auto Report** - Default is **No**. Select **Yes** to enable the user to inherit all of the reports under its domain.

**NOTE:** The Refresh button can be used to refresh information changed in Netsecure that has not yet populated to the User Admin page. Fields that must be changed in Netsecure include First Name, Last Name, and Email Address.
3. Role Authorizations further define the level of user access. Select the roles to be assigned to the user.

**Security Services Administration**

**ClientAdmin** - User with Security Administrator access for creating, maintaining, and updating additional company users’ access to Security Services Administration application.

**ExternalViewer** - User who has access to view security information only.

**Tax Reporting Online**

**ClientUser** - User who has access to all tax reports on Tax Reporting Online.

4. Once all assignments are selected, click **Save**.
Company Code Maintenance

Current company codes assigned to a user can be viewed as well as edited to add or remove company codes.

1. To view the company codes assigned to a user, click the **Company Code** icon link from the User Admin page.

2. Company codes that have not been assigned to the user will display in the Available column. Company codes currently assigned to the user will display in the Selected column. To add or remove a company code, click to highlight the company code and then click **Add** or **Remove**. To transfer over all company codes for a designated site code, select one and click **Add All** or **Remove All**.

3. Click **Save**, or click **Cancel** to exit the process.
Assign Reports

Current report assignments for a user can be viewed or changed.

1. To view the reports assigned to a user, click the Report icon link from the User Admin page.

2. Report groups will be listed based on the role authorizations of the user. Reports that have not been assigned to the user will display in the Available column. Reports currently assigned to the user will display in the Selected column. To add or remove a report, click to highlight the report and then click Add or Remove. To transfer over all reports, select and click Add All or Remove All.

To assign a user to view historical reports from the time of the initial Site ID setup, select the Published Historical Report boxes to assign Company Level and Employee Level report access.

3. Click Save, or click Cancel to exit the process.
Management Report

Management Report provides custom audit reports for transactions performed and user audit reports. Reports are displayed in Crystal Reports Viewer and can also be printed or exported.

From the Security Services Administration Homepage, click Management Report, or click the Management Report link.
User Application Report

The User Application Report displays detailed information on the applications setup in Security Services Administration.

The report includes:

- ISI Client ID and Name
- Name and User ID
- Date of Creation and Last Login
- Application Name
- Role (as assigned)

1. From the Management Report page, click the **User Application Report** link.

2. The Management Report - User Application Report page displays. Enter the report criteria, and click **Run Query**.
   - **Report Name** – Enter a name for your report.
   - **Site ID** – Enter the specific Site ID for the report.
   - **Application** – Using the drop-down arrow, select **All** or the specific application for the report.
3. The page displays the request with an In Progress status. Click the In Progress link to update.

4. When the status changes to Ready, click the Ready link to view the report in Crystal Reports Viewer.
User Company Report

The User Company Report displays the company setup in Security Services Administration. The report includes:

- ISI Client ID and Name
- User ID
- Creation Date
- Site ID
- Br/Co

1. From the Management Report page, click the **User Company Report** link.

2. The Management Report - User Company Report page displays. Enter the report criteria and click **Run Query**.
   - **Report Name** – Enter a name for your report.
   - **Site ID** – Enter the specific Site ID for the report.
3. The page displays the request with an In Progress status. Click the **In Progress** link to update.

4. When the status changes to Ready, click the **Ready** link to view the report in Crystal Reports Viewer.
Company Admin

The Company Admin area is for Administrators to maintain and change assignments of company code authorizations for users.

1. From the Security Services Administration Homepage, click the Company Admin tab or click the Company Admin link.

2. The Company Maintenance page displays. Enter the Site ID and the Branch/Company Code for the company you would like to update users, and click Search.
3. All Company Names found with the searched criteria displays. Click the **Assign User** icon link for the company.

![Image of Company Maintenance - Assign User page]

4. The Company Maintenance – Assign Company to Users page displays. Users who have not been assigned to the company will display in the Available column. Users currently assigned to the company will display in the Selected column. To add or remove a user, click to highlight the user and then click **Add** or **Remove**. To transfer over all users in this field, select and click **Add All** or **Remove All**.

![Image of Company Maintenance - Assign Company to Users page]

5. Click **Save**, or click **Cancel** to exit the process.
Log Off Security Services Administration

1. To exit completely from Security Services Administration, click the \( \times \) icon in the top-right corner of the page.

2. A confirmation message displays. Click **Close Window**.