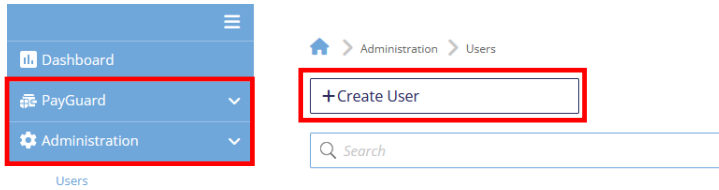


PayGuard Administration

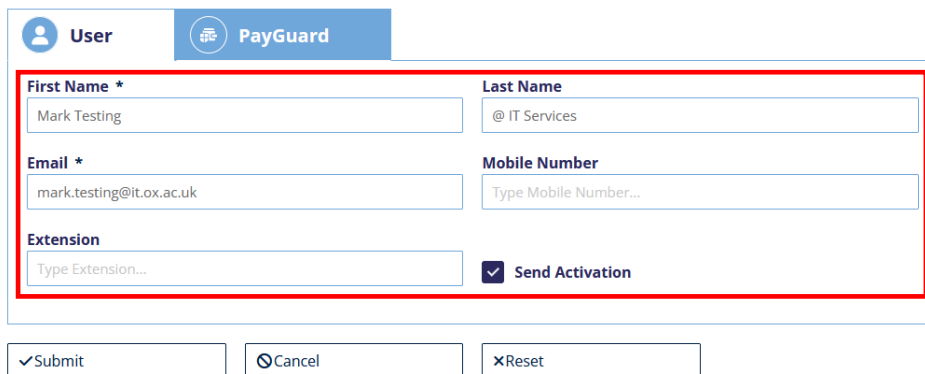
Creating a New User

- PayGuard > Administration > Users > Create User



- Select the 'User' tab.
- **First Name** – First Name + Surname/Surname Initial
 - Appears on confirmation email to customer so must be appropriate. Individual users must be recognizable for audit purposes.
- **Last Name** – @ Department/Team Name
 - Appears on confirmation email to customer and is the best way for the customer to know which department/team has taken the payment.
- **Email** – Users Email Address
- **Mobile** – Leave Blank
- **Extension** – Leave Blank
- **Send Activation** – Tick
 - Sends an email to the user to activate their account.

Administration > Users > Add User



The screenshot shows the 'Add User' form in the PayGuard Administration interface. The form is titled 'User' and 'PayGuard'. It contains several input fields: 'First Name *' (with the value 'Mark Testing'), 'Last Name' (with the value '@ IT Services'), 'Email *' (with the value 'mark.testing@it.ox.ac.uk'), 'Mobile Number' (with the placeholder 'Type Mobile Number...'), and 'Extension' (with the placeholder 'Type Extension...'). There is also a checkbox for 'Send Activation' which is checked. At the bottom of the form, there are three buttons: 'Submit', 'Cancel', and 'Reset'.

- Select the 'PayGuard' tab.
- **PIN** – 4 Digits and Unique
- **Credit Transaction Limit** – TBD by Department
- **Credit Daily Limit** – TBD by Department
- **Transaction Refund Limit** – TBD by Department
- **Daily Refund Limit** – TBD by Department
- **Redirect to Workspace after Login** – TBD by Department
- **Secret Key** – Leave Blank
- 'Submit'

User

PayGuard

PIN
1075

Credit Transaction Limit
Type Credit Transaction Limit...

Credit Daily Limit
Type Credit Daily Limit...

Transaction Refund Limit

Daily Refund Limit

Redirect to Workspace after Login

Secret Key

- **Password** – Leave Blank
- **Extension** – Leave Blank
- **Roles** – Required Role (See Appendix)
- **Teams** – Required Team
- **'Submit'**

User

PayGuard

First Name * **Last Name**

Email * **Mobile Number**

Password **Extension**

Roles

Teams

Making a User Inactive

- PayGuard > Administration > Users > search for user

- Click on the  in the 'Actions' column.

9482 09 Nov 23 15:26:25  Mark Testing @ IT Services Project Delivery PayGuard Supervisor 1075 ● Active  

- In the 'Details' box, update the 'Status' to 'Inactive' > 'Submit'.

Administration > Users > Edit User

User PayGuard

First Name *
Mark Testing

Last Name
@ IT Services

Email *
mark.testing@it.ox.ac.uk

Mobile Number
Type Mobile Number...

Password
Type Password...

Extension
Type Extension...

Roles
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Submit Cancel XReset

Details

Status *
Inactive

Timezone *
Europe/London



Manually Resetting a User's Password

- PayGuard > Administration > Users > search for user

Administration > Users

- Click on the  in the 'Actions' column.

9482 09 Nov 23 15:26:25  Mark Testing @ IT Services Project Delivery PayGuard Supervisor 1075 ● Active  

- Enter a password in the 'Password' field > 'Submit'.
- The password requirements are:
 - At least 15 characters
 - Uppercase
 - Lowercase
 - Number
 - Special Character

User **PayGuard**

First Name * Mark Testing	Last Name @ IT Services
Email * mark.testing@itlox.ac.uk	Mobile Number Type Mobile Number...
Password Type Password...	Extension Type Extension...

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✓ Submit Cancel X Reset