

ATB FX Administrator

User Guide

Administrator Role

When we setup ATB FX for your business, we will assign the person you designated as the administrator for your company on the platform. The administrator role can then create and manage all your users on ATB FX.

Your administrator can follow the steps below to see user details, assign roles to users, manage accounts assigned to each user, and reset passwords.

Setting up user accounts

How to view all users and individual user details

Step 1 - After logging into ATB FX, select “Client Users” in the main menu.

Login ID	Counterparty Shortname	First Name	Last Name	Status
CSmart	ATBFX TEST CTP 001 V2	Smart	Chris	Active
EJohnson	ATBFX TEST CTP 001 V2	Emily	Johnson	Active
TestClient001	ATBFX TEST CTP 001 V2	ATBFX	Test	Active

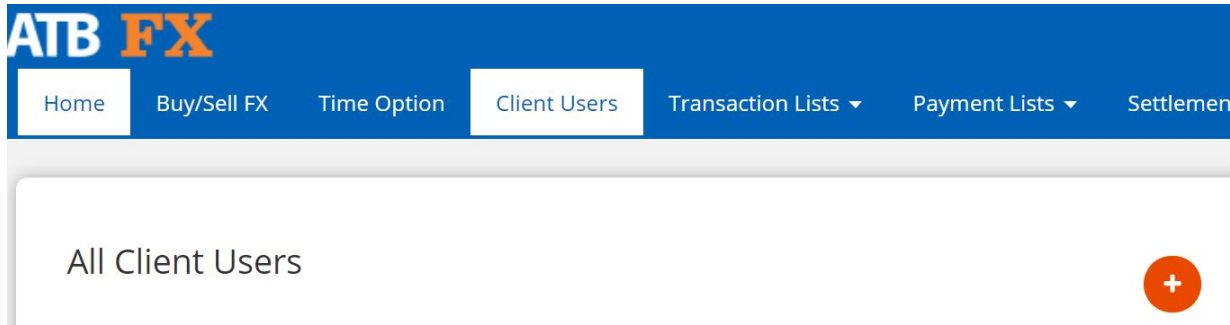
Step 2 - Clicking on the magnifying glass to the right of the user will show that user’s details. From this screen, you can select the tab for:

- User Information
- Role
- Accounts assigned and accounts of this counterparty
- Password

Client User Details
<div style="display: flex; justify-content: space-around;"> <div>User Info</div> <div>Role</div> <div>Account</div> <div>Password</div> </div>

How to add a new user

Step 1 - On the “Client User” main screen, click on the “+” button to add a user.

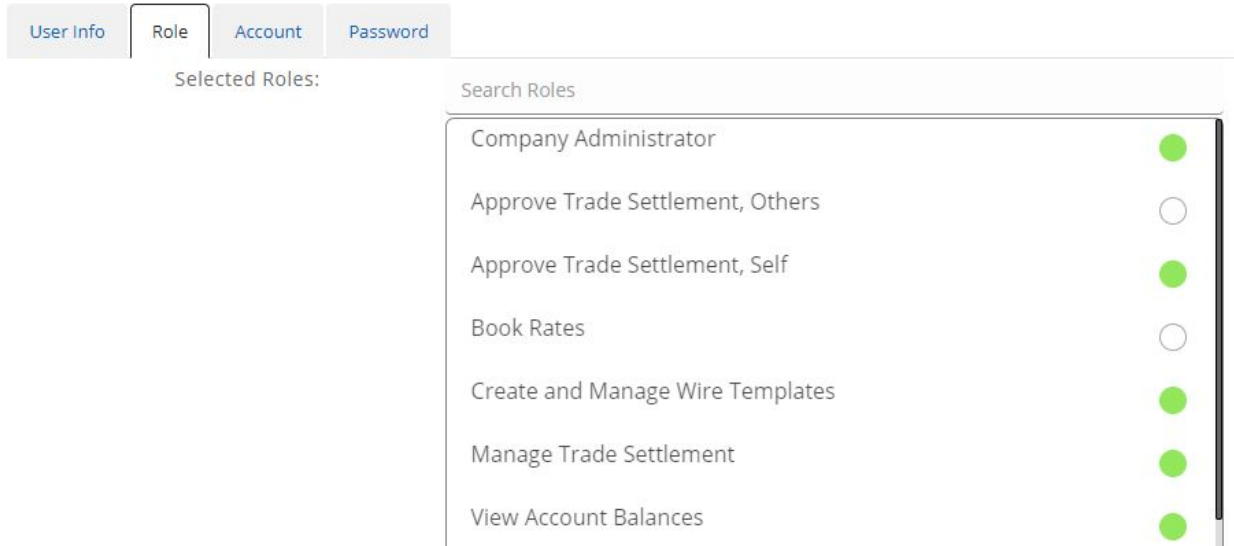


Step 2 - Add in the new user’s information – login ID, name, email address, phone number and initial user status (active or suspend). If your username gets rejected, it means another ATB FX user already has that login ID, so you’ll need to try another variation.

Client User Details

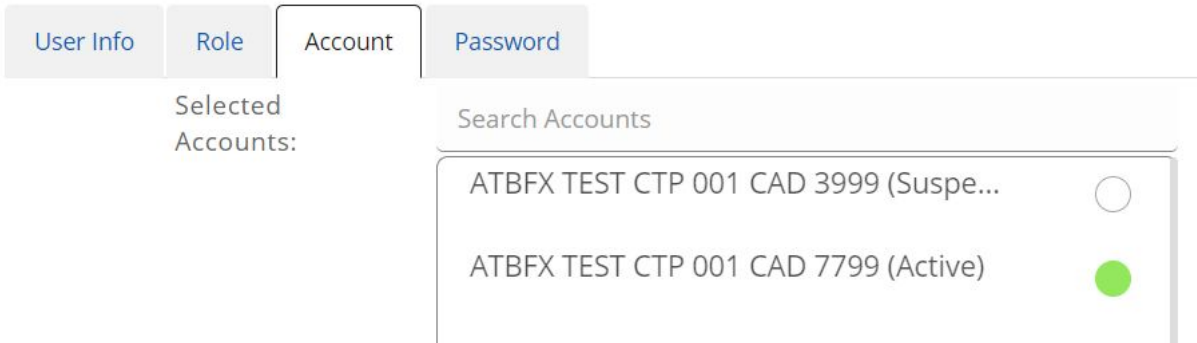
User Info	Role	Account	Password
Counterparty Shortname*:	ATBFX TEST CTP 001 V2		
Login ID*:	<input type="text" value="Hsmith"/>		
Last Name:	<input type="text" value="Smith"/>		
First Name:	<input type="text" value="Heather"/>		
Middle Name:	<input type="text"/>		
Email Address:	<input type="text" value="hsmith@gmail.com"/>		
Phone Number (Work):	<input type="text" value="7809543287"/>		
Phone Number (Cell):	<input type="text"/>		
Status*:	ACTIVE ▼		

Step 3 - Click the “Roles” tab, and select which roles you want that user to have in ATB FX. If you’re unsure, a list of the roles along with the tasks each user can do are listed in the table below.



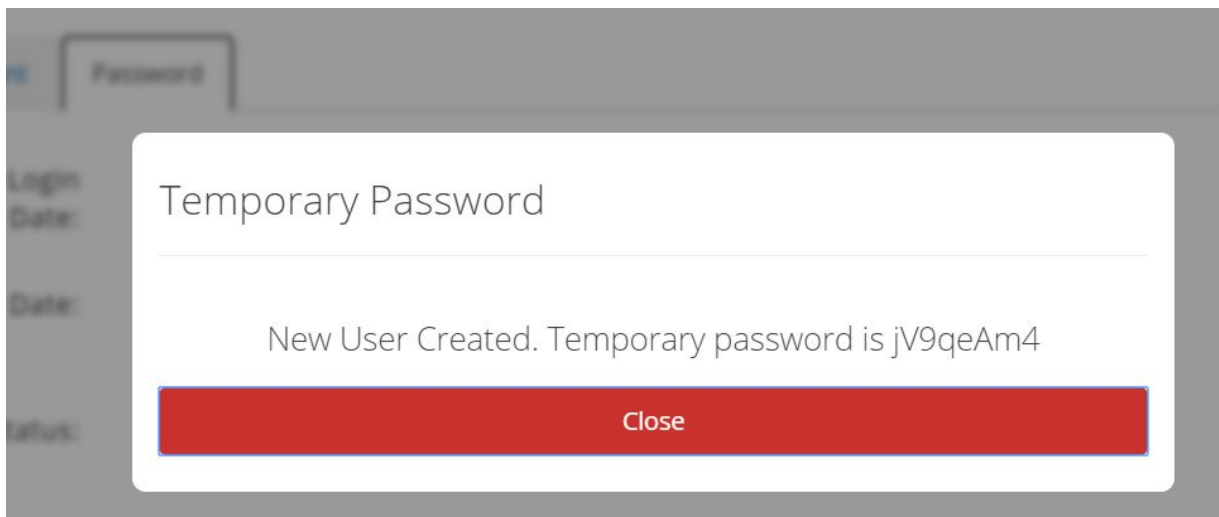
Roles	Responsibilities
Company Administrator	Manage and add user roles, accounts, and other administrative capabilities.
Approve Trade Settlement, SELF	Users can approve the trade settlement of any trade.
Approve Trade Settlement, OTHERS	Users can approve the trade settlement of trades that others have submitted for approval.
Book Rates	Users can book a rate for any product that they have been set up for.
Create and Manage Wire Templates	Users can create a new wire instruction, or amend an existing wire instruction.
Manage Trade Settlement	Users can add existing wire instructions to trades and submit for approval, as well as export transaction history.
View Account Balances	Users can view account balances.

Step 4 - On the “Accounts” tab, select at least one account from the list of counterparties that this user will be able to access. When selected, the icon will turn green.



Step 5 - A new user is automatically onboarded with two-factor authentication so there is no action you need to take on the “Password” tab.

Step 6 - Click “Save,” and you will get a temporary password to give to the user. This password will expire after 24 hours.



Managing user accounts

The Administrator can suspend users, as well as update and change their permissions.

How to change user information and permissions

Step 1 - On the “Client User” main screen, click on the magnifying glass to the right of the user you want to manage.

Step 2 - Click the “Edit” button found in the bottom right corner.

ATB FX Home Buy/Sell FX Time Option Client Users Transaction Lists Payment Lists Settlement Instructions

Client User Details

User Info Role Account Password

Counterparty Shortname*: ATBFX TEST CTP 001 V2

Login ID*: Hsmith1

Last Name: Smith

First Name: Heather

Middle Name:

Email Address: hsm*****

Phone Number (Work): 780*****

Phone Number (Cell):

Status*: ACTIVE ▼

Created By: TestClient001
Created Date: 2020-05-15

Updated By: TestClient001
Updated Date: 2020-05-15

Back Edit

Step 3 - Make the desired changes to the user. All the information can be edited except for the login ID.

Here is a list of information that can be changed on each tab:

- Name, email address, phone number, and status

User Info	Role	Account	Password
Counterparty Shortname*:	ATBFX TEST CTP 001 V2		
Login ID*:	Hsmith1		
Last Name:	<input type="text" value="Smith"/>		
First Name:	<input type="text" value="Heather"/>		
Middle Name:	<input type="text"/>		
Email Address:	<input type="text" value="hsm*****"/>		
Phone Number (Work):	<input type="text" value="780*****"/>		
Phone Number (Cell):	<input type="text"/>		
Status*:	<input type="text" value="ACTIVE"/>		

- Role assignment: You can select and deselect roles that apply to the user.

- Account Assignment: Assign and unassign accounts to your user. If you do not see a third party account listed, call the ATB FX team to get it added to your account.

Client User Details

- Password: There is nothing to change here, but you can reset the password and security key. You cannot enable or disable two-factor authentication.

Step 4 - Click "Save" to apply your changes to the user.

How to reset a password or two-factor authentication security key

Step 1 - On the “Client User” main screen, click on the magnifying glass to the right of the user you want to change the password for.

Step 2 - Select the “Password” tab.

The screenshot shows the ATB FX Client User Details page. The top navigation bar includes Home, Buy/Sell FX, Time Option, Client Users, and Transaction. The main content area is titled "Client User Details" and has four tabs: User Info, Role, Account, and Password. The Password tab is selected. Below the tabs, the following information is displayed:

- Last Successful Login Date:
- Password Reset Date: 2020-05-11
- Status: Password Expired
- Password: [Reset Password button]
- Security Key: [Reset Security Key button]
- 2 Factors Authentication:

Step 3 - Click the “Reset Password” button, and you will be given a temporary password for the user. This password will expire after 24 hours.

Or, click the “Reset Security Key” button to allow the user to setup two-factor authentication on a new device.



Contact us

Our ATB Financial Markets team will be happy to assist.

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