

# SOP for Bank ADFS & Work Group Configuration

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## Introduction:

NPCI has hosted a centralized UI for banks migrating from Clearing House Interface (CHI) to Data Exchange Module (DEM). The banks can access this UI to monitor processing at CH and to retrieve reports.

In order to access the centralized UI, banks need to carry user management locally. The user management can be done with either of the options:

- In bank's corporate Active Directory (AD) with Active Directory Federation Services (ADFS)
- 2. By creating work group for DEM. This option can be used if bank does not have corporate AD or does not have access to corporate AD from DEM network or cannot provide ADFS due to any other reason.

Note: The ADFS can be configured on the AD server as additional role or can be installed as a service on a server which can access corporate AD.

For configuration details of ADFS with Active Directory, please refer Chapter-1

For configuration details of work group, please refer Chapter-2

# Chapter I – Configuring CCH UI access Using active directory:

Banks need to execute following steps to configure user authentication and management using active directory and ADFS

## Step-1: Configuration changes at active directory:

Banks are required to configure following user attributes in the Active Directory:

- 1. **Routing number:** This will be used to store the routing number of the bank for which the user can see the data. The routing number should be nine digit MICR code of the bank.
- 2. **User role:** This attribute is used to identify administrators for the bank.
  - a. User role: WEBCHI\_ADMIN.

**Note:** The names of the user attributes are required to be exactly same as above. Please refer section "<u>Steps to configure user attributes in Active Directory</u>" for details of how to configure the user attributes

# Step-2: Configuring relying party endpoint at ADFS:

## Pre-requisites:

Bank is required to have ADFS role installed and configured. The ADFS role can be configured on the active directory itself or can be configured as a service on a different



machine (e.g. on the DEM machine). However, it is required to have only one ADFS service active in one VLAN.

Follow below steps to configure relying party endpoint:

- 1. Navigate to ADFS Management.
- 2. Select relying party trusts.
- 3. In the middle pane, select the relying party trust created for APTRA Clear application.
- 4. Double Click on the relying party trust.
- 5. A pop-up window appears. Select endpoints Tab.

Monitoring Identifiers	Encryption	Sic	anature	Accepted (	laim
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#### 6. Now select the SAML assertion consumer endpoints.

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#### 7. Click on Edit Button.

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SAML Assertion Consumer	
Binding:	
POST V	
Set the trusted URL as default	
Trusted URL:	
https://153.71.45.81:8443/ecpix/servlet/ecpix?brandName=en	
Example: https://sts.contoso.com/adfs/ls	
Response URL:	
Example: https://sts.contoso.com/logout OK Cancel	
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भारतीय राष्ट्रीय सुगतान निगम
Endpoint type:
SAML Assertion Consumer V
Binding:
POST V
Set the trusted URL as default
Index: 0
Trusted URL
https://153.71.45.81:8443/ecpix/servlet/ecpix?brandName=en
Example: https://sts.com/ose.com/adfo/fe
Response URL:
Example: https://sts.contoso.com/logout
OK Cancel

.

- 8. Select the binding type as 'post'
- 9. Update the trusted URL with aptra clear URL which is shared by NPCI.
- 10. Now click on ok.

Monitoring Organization	Identifiers Endpoints	Encrypt Prox	ion Si Sy Endpoir	ignature   nts   Note	Accepted C es Adva	
	dpoints to use	of or SAMI				
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- 11. Click on apply.
- 12. Restart ADFS services.

# Step-3: Configuring administrator User:

To provide administrator access to any user, following changes are required:

1. Ensure that the user is active in the active directory and is able to login from the machine where CCH access is required.



2. Set following user attributes for the user:

Routing number: nine digit MICR code for the bank

User role: WEBCHI\_ADMIN

Note:

- 1. The user role attribute value is required to be exactly same as given above.
- Please refer section "<u>Steps to configure user attributes in Active Directory</u>" for details

#### Step-4: Configuring operations users for CCH:

As a pre-requisite, bank needs to define the user roles to be permitted to access the system. E.g.: WEBCHI\_OPERATOR can be used for normal operator.

After finalizing the user role name, follow steps below to configure access for the users:

- 3. Login to CCH UI using the WEBCHI\_ADMIN user credentials
- 4. Define the user roles finalized as the perquisite step.

Note: Please refer section "Steps to Configure User Groups at CCH" for details.

- 5. Map the screen access to a given user role.
- 6. Ensure that following attributes are set in active directory for all operations users:
  - a. Routing number: Nine digit micr code for the bank
  - b. User role: Any of the user roles finalized as pre-requisite step.

**Note:** For detailed steps, please refer section "Steps to configure operations users in APTRA Clear as Bank Admin user"

## Step-5: Configuration changes at CCH:

Before requesting configuration changes at CCH, bank must validate the ADFS configuration using following steps:

1. Open the ADFS URL in browser.

https://[ADFS server IP]/adfs/ls/ldplnitiatedSignon.aspx

- 2. Select the relying party and login to the Bank AD. Once after successful login, ADFS page will be redirected to APTRA Clear URL which is shared by NPCI.
- 3. If URL re-direction is appearing in browser, which means AD Login is successful.



- Banks must share above ADFS URL with NPCI to configure the bank ADFS URL in APTRA Clear. This is last step to enable the CCH access for administrator and operations users.
- 5. After confirmation from NPCI, bank needs to follow further steps.

#### Step-6: Configuring user groups at CCH:

Please refer steps detailed in Chapter-3: Steps to Configure User Groups at CCH

#### Step-7: Mapping tasks to user groups at CCH:

Please refer steps detailed in Chapter-3: Steps to Map Tasks to User Groups

#### Step-8: Verifying bank operator login:

Please refer steps detailed in Chapter-3: Steps to Verify Bank Operator Login

Steps to configure user attributes in Active Directory

- 1. Navigate to Active Directory Users and Computers.
- 2. Select Users in left pane.
- 3. Select a User and double click on it.

File Action View Help				
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þ 🚞 Builtin	CCHBank105	User		
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Domain Controllers	& Cloneable Domain Controllers	Security Group - Global	Members of this group t	
ForeignSecurityPrincipals	& DemUI_Admin	User		
LostAndFound	& DemUI_User	User		
Managed Service Accounts	& DemUlAdmin	Security Group - Global		
Program Data	& DemUlUser	Security Group - Global		
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	& Domain Users	Security Group - Global	All domain users	
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#### 4. Navigate to Attribute Editor Tab.

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unicodePwd	<not set=""></not>
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userPKCS12	<not set=""></not>
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5. Update user Role as 'WEBCHI\_ADMIN' and Routing Number as 'bank routing number'.

Cancel

ок

6. Click on ok button.

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Help

Apply



#### Chapter II – Work Group user & roles creation:

Member banks can do the user management using Work Group, in the absence of active directory, usage of Work Group is supported. Bank has to create the users in their Work Group module and assign rights to the respective user groups to access the Aptra clear 6.0 application

Bank must create following roles in the Work Group to map their users to enable the access to the users for the above web pages to monitor/ manage.

- 1. WEBCHI\_ADMIN
- 2. WEBCHI\_Operator

# Step-1: Configuring administrator user:

Bank need to create WEBCHI\_ADMIN group and then assign existing user to the WEBCHI\_ADMIN group. This user will act as bank administrator and below mentioned steps to be followed.

- a) To open Workgroup module, go to Run Dialog ,enter lusrmgr.msc and press Enter
- b) On the left pane click groups.
- c) The system will list all the groups.
- d) Click action and create new group
- e) In new group specify the following details
- f) group name: WEBCHI\_ADMIN
- g) Specify the group description
- h) Members: click Add to locate and Add members in the group
- i) Click create in the specified group
- j) Click close in the dialog box

# Step-2: Configuring operations users in Work Group:

- 1. In Workgroup module go to Run Dialog, type lusrmgr.msc and press Enter
- 2. On the left pane click groups.
- 3. The system will list all the groups.
- 4. Click action and create new group
- 5. In new group specify the following details
- 6. Group name for Ex: 'Bank\_Operator'



- 7. Specify the group description
- 8. Members: click Add to locate and Add members in the group
- 9. Click create in the specified group
- 10. Repeat step 4 to 10 if you wish to configure multiple user groups (e.g. bank\_operator

for normal data view and bank\_super\_operator to view critical data)

11. Click close in the dialog box

# Step-3: Configuration changes at CCH :

- 1. Banks must inform NPCI to configure the authentication type as 'Work Group' in APTRA Clear for the bank. This is last step to enable the CCH access for administrator and operations users.
- 2. After confirmation from NPCI, bank needs to follow further steps.

## Step-6: Configuring user groups at CCH:

Please refer steps detailed in Chapter-3: Steps to Configure User Groups at CCH

## Step-7: Mapping tasks to user groups at CCH:

Please refer steps detailed in Chapter-3: Steps to Map Tasks to User Groups

## Step-8: Verifying bank operator login:

Please refer steps detailed in Chapter-3: Steps to Verify Bank Operator Login

## Chapter III – Common Steps:

## Steps to configure user groups at CCH

 Open web browser and enter APTRA Clear URL. <u>https://<IPADDRESS>:<Port>/ecpix/servlet/ecpix?brandName=en&routingNumber</u> <u>=<BankRoutingNumber</u>>

Note: IP address will be shared through mail.

2. If bank login details are updated at CCH, following ADFS Login screen/windows credentials pop-up will appear.

With ADFS Authentication is enabled at bank:

153.71.852 - Remote Desktop Connection	NPCC भारतीय राष्ट्रीय सुगतान निगम NATIONAL BYMENTS CORPORATION OF INDA
📀 🗇 🕑 http://153.71.852/adfs/fs/ldpinitiatedSignon.asps	P + 🥸 Certificate error
The Edit View Favorities Tools Help	SEP03VVM- 901.NPCICCH.com Sign in with your organizational account memory Sign in
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With Windows Workgroup Authentication is enabled at bank:

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	user credentials, who belongs to WEE I login, following page appear.	BCHI_ADMIN Group.
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			भारतीय राष्ट्रीय सुगतान निगम NYMENTS CORPORATION OF INDIA
			- 0 X
C () ( https://10.219.107.161:9443/ecpix/servlet/ecpix?brandName=en	오 두 🔒 🖒 🏉 Administration	Module ×	合 🛧 祭
File Edit View Favorites Tools Help			
🚖 🚳 Bank_ICICI 🚳 DEMUI 🚳 APTRACLEAR_600001000			
			Go to: Bank Configuration ✔ Go
Administration Module Step 1 of 3 :: Select User Group			
Group DEERATORS ×  View Group Mapping Set Permissions AddEdt Group(s)			

- 4. Bank admin user need to create different user groups using the administration module.
  - a. Login using administration credentials
  - b. On the administration module screen, click Add/Edit Groups.
  - c. click add user group
- 5. Now click on add user group button to create new bank group and permission.

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Group Management [Routing Number: 600229000]	
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6. Now click on add user group button.

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Add User Group for Royaling Number: 020229000		Tiges - To set one group, enter the name in the terr fails and sites on Team button. - To manyors to previous page, once or Canad button. - Toman name must be contribution of Ripholasts (R to Z a true) and Nonderec(D to D).
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#### 7. Click on save.

Example 2 Section 2 Sectio	오 - 🔒 🖒 🏉 Group Management	×
File Edit View Favorites Tools Help		
🖕 🚳 Bank_ICICI 🚳 DEMUI 🚳 APTRACLEAR_600001000		
Group Management [Routing Number: 600229000]		
Group Name		
OPERATOR2		
operator		
Delete Add User Group Back		
Tips • To add a New Group, click on Add User Group button. • To rename details of a group, please click on the group name.		
<ul> <li>To delete a group, select the groups and click on delete button.</li> </ul>		
<ul> <li>To navigate to administration module screen, click on back button</li> <li>To delete all groups,select the checkbox above the panel and click on Delete button.</li> </ul>		

8. Now click on back button.

		Go to: Bank Configuration 🗸 Go
	ation Module	
Step 1 of 3	: Select User Group	
Group Na	The View Group Mapping Set Permissions AddEdit Group(s)	
Tips	<ul> <li>Type the first few latters of the group to be selected in the Group Name field. Select the appropriate group from the diopdown that appears, and click the Set Permissions button.</li> <li>To can enryll the back assigned to each group by clicking on the View Group Mapping button.</li> <li>To Add or Update the diopert Latybace cdick AddEd Group button.</li> </ul>	

#### Steps to map tasks to user groups:

The mapping of user groups involves 3 steps:

- a) Selecting user group
- b) Mapping tasks to the groups
- c) Confirm and save the data
- 1. Select the recently created group in group name drop down.

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			Go to: Bank Configuration V Go
Administration Module Step 1 of 3 :: Select User Group			
And A. S. Street, User Vorter         Top           Choup         Coup Mapping           Name         Contract Contract Contract           OPERATOR         OPERATOR			
Confidential			13



2. Click on set permissions button, then following screen will appear. The map tasks to group screen enables the mapping of user groups to available tasks.

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File Edit View Favorites	File Edit View Favorites Tools Help					
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	N GRID					
Administration Module						
Step 2 of 3 :: Map Tasks to Groups						
Group Name	OPERATOR2					
		Select All Reset	View Group Mapping E	Back Next		

3. Now select the tasks to the respective group.

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Administration Module					
Step 2 of 3 :: Map Tasks to Groups					
Group Name	OPERATOR2 B: ♥ P Mik Upload Return - 0 P Bulk Upload Return - 0 P View Generate Reports - 0 P Special Hems Monitor - 0 P View Input Output Monitor				
		Select All	Reset View Group Mapping	Back Next	

4. Click next button.

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A Bank_ICICI I DEMUI I APTRACLEAR_600001000	
Administration Module	
Step 3 of 3 :: Confirm	
You have set the following privileges for the user group you have selected:	
Group.Name Associated Tasks OPERATOR2 1. Messages	
2. Send Message 3. View Message	
4. Bulk Upload Return	
5. View Generate Reports 6. Special Items Monitor	
7. View Input Output Monitor	
	Back Save Cancel
<ul> <li>The Back button lets you modify the selected tasks for the selected user group.</li> <li>All Selections will be tools on clinking the Cancel button. You have to reaselect the user and its associated tasks again.</li> <li>The Cancel button cancel any selections made on last screen.</li> </ul>	
Confidential	14



- 5. Now click on save.
- 6. Now select the role again and click on view group mapping.

Administration Module Step 1 of 3 :: Select User Group Group Name View Group Mapp	ing Set Permissions Add/Edit Group(s)	Go to: Bank Configuration ✔ Go
Associated Task	I:9443/?CONTEXT=vie 🗕	
Group Name OPERATOR2	<u>Associated Tasks</u> 1. Messages 2. View Message	
ICICIBANKOPERATOR	<ol> <li>Send Message</li> <li>Special Items Monitor</li> <li>View Input Output Monitor</li> <li>View Generate Reports</li> <li>Bulk Upload Return</li> <li>Messages</li> </ol>	
	<ol> <li>View Message</li> <li>Send Message</li> <li>Special Items Monitor</li> <li>View Input Output Monitor</li> <li>View Generate Reports</li> <li>Bulk Upload Return</li> </ol>	

- 7. Make sure all selected tasks associated for newly created user role 'Bank\_Operator'.
- 8. Now, Login to Active Directory and update all users with routing number as **Bank Routing Number** and user role as '**Bank\_Operator**'.

#### Steps to verify bank operator Login:

 Open web browser and try the below URL to login to APTRA Clear as Bank user: <u>https://<IPADDRESS>:<Port>/ecpix/servlet/ecpix?brandName=en&routingNumber</u> <u>=<BankRoutingNumber</u>>

Note: IP address will be shared by NPCI through mail.

Enter the user credentials for operations user.
 Once after successful authentication APTRA Clear bank page will be opened.

