

How do I set up a new Time Bank Online User?

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When you have a new Time Bank Online user who needs to run a Time Bank interface, follow these steps:

Step 1: Fill out our [Account Update Form](#) for your IDI Account Manager to update any primary contact information for account management purposes.

Step 2: Add the user to your Time Bank Online site(s).

- For detailed instructions on how to do this, refer to the section below titled **Adding/Maintaining Time Bank Online End Users**.

Step 3: If needed, install Time Bank Transfer (TBXfer.exe)

- If your solution requires a read or write exchange between your local environment and Time Bank Online, you'll need to download the Time Bank transfer application, TBXfer.
 - [What is the transfer application TBXfer?](#)
 - [Time Bank Online Quick Guide](#)

Step 4: Refer to your configuration documentation in your Time Bank site for information on your particular interface and the steps to process.

- From your Time Bank Online site:
 - Select Support tab > Documentation > Configuration Document
 - Refer to the *Time Bank Online General Configuration* documentation for information on Time Bank Online

Adding/Maintaining Time Bank Online End Users

A user, who has been setup as an Admin User, can add additional users to a site and can change passwords for existing users. If you don't know who your admin users are, contact support@idesign.com to request that information.

The Online Security Portal is run from the following Time Bank Online web site:

<https://www.timebankonline.com/IDISP/>



Click on the End Users tab to manage End users.

End Users

Display Users for Selected Site:
 51086 - Contractor Central Demo

Filter Site List:

User Name	Friendly Name	Rule	Locked Out?	Is Admin	Force Password Change?	
dwhite@ccdemo.com	Dawn White	Strong	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Change Password"/>
EndUser@ccdemo.com	End User	Strong	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Change Password"/>

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Display Users for Selected Site:
 51086 - Contractor Central Demo

User Name

Friendly Name

Rule

Locked Out?

Is Admin

Force Password Change



1 2 3

This drop-down lists sites you have access to. If you have access to more than one site, use this drop down to select the site you would like to work with.

This is the name used to log into Time Bank online Security Portal. This must be a valid email address.

Name of End User

Password Security Rule. Always Strong. Not editable.

Locks the End User account so the End User cannot login.

The End User is an admin. **Admin user can add additional users to site. For certified payroll it is recommended all users are Admin. Admin must be Admin to view reports run by other users.**

Force user to change password when they login. Recommended when adding a new user or updating a user's password.

Save User changes

Undo changes

Allow this user to access another site. Only site you have access to work with available.

Disable End User. This icon displays blue if a user is enabled or red if has been disabled.

Change the End User's password

Add a new End User

Links to navigate other pages

Click on the button

The screenshot shows a dialog box titled "Add a User". It contains a section titled "Account Information" with the following fields:

- User: [text box]
- Friendly Name: [text box]
- Site: [dropdown menu showing "51086 - Contractor Central Demo"]
- Password: [text box]
- Confirm Password: [text box]

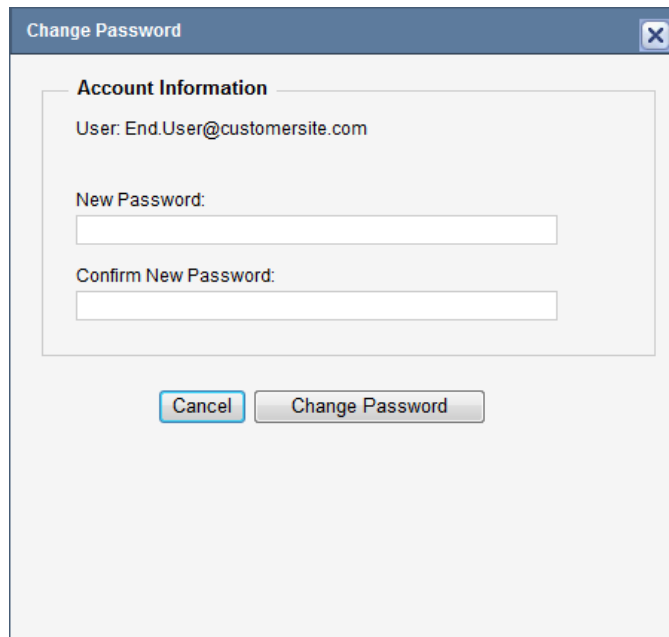
At the bottom of the dialog are two buttons: "Cancel" and "Add User".

1. Click in the text box under "User:" to add the username. The username should be a valid email address.
2. Click in the text box under "Friendly Name:" to add the name for the user.
3. Click on the black arrow at the end of the drop-down box under "Site:" and select the Site that the end user is associated with. Only the list of sites you have access to will be available.
4. Click in the text box under "Password:" to add the password for the user. Password Requirements:
 - 8 long minimum
 - At least one upper letter
 - At least one lower case letter
 - At least one numeric
 - At least one special character (non-numeric, symbol)
5. Click in the text box under "Confirm Password:" to confirm the password for the user.
6. Click on the button to add the user to the End Users list.
7. If the End User is to have admin rights to the site, select the Admin checkbox and then Save.


Password Requirements:

- 8 long minimum
- At least one upper letter
- At least one lower case letter
- At least one numeric
- At least one special character (non-numeric, symbol)

Click on the button to launch the Change Password screen.



The image shows a 'Change Password' dialog box with a blue title bar and a close button (X) in the top right corner. Inside the dialog, there is a section titled 'Account Information' which contains the text 'User: End.User@customersite.com'. Below this, there are two input fields: 'New Password:' and 'Confirm New Password:'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Change Password'.

1. Enter the End User's New Password in the box below "New Password:".
2. Enter the End User's New Password once more in the box below "Confirm New Password:".
3. Click on the  button.

[Contact IDI Support](#)
