



FacilityPro user portal User Manual

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1 INTRODUCTION

This is the user manual for the FacilityPro user portal (user portal for short).

At a site where FacilityPro, Magna Carta's facilities management platform, is in use, the people that can purchase products or gain access by presenting a card/ID at a FacilityPro terminal are called users. This is the manual for the users. For the system administrator who can define the outlook and various settings of the user portal, there is a chapter in the user manual of FP5.

The FacilityPro user portal enables users to:

- manage and reload the balance of their card/ID. This can be either the balance of a back office account (online systems) or of the e-purse on the card/ID (off-line systems).
- manage and upgrade privileges
- block lost or stolen cards/IDs
- view previous transactions
- activate a card/ID for which the user received an activation code (on sites where this functionality is used)

In the future, they will also be able to:

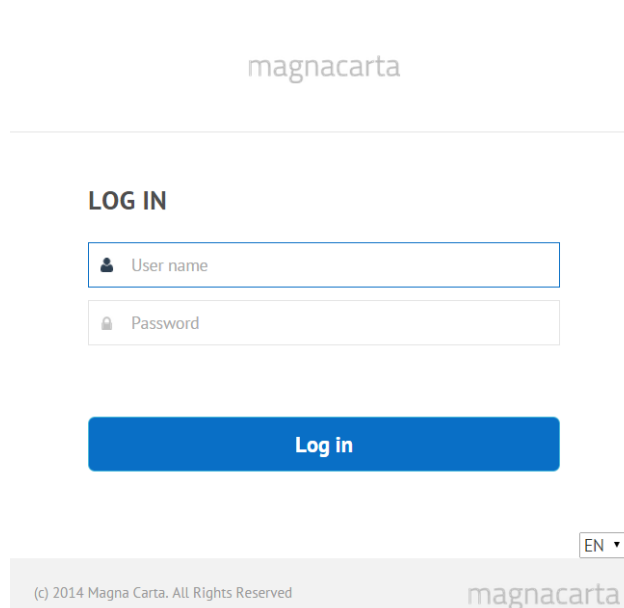
- give their opinion on product quality
- give their opinion on the range of products and services

Users can only use the user portal if they have a user name and a password. These are either the same user name and password used to log into the university or company system, or they are defined with FP5 by your system administrator.

2 LOGGING IN

FacilityPro user portal is accessed in a web browser using a URL. Generally there will be a link to the user portal in the website of the university or company concerned.

The URL leads to the login screen.



The screenshot shows the login interface for the Magna Carta user portal. At the top, the word "magnacarta" is displayed in a light grey font. Below this, the heading "LOG IN" is centered. There are two input fields: the first is labeled "User name" with a person icon, and the second is labeled "Password" with a lock icon. A blue "Log in" button is positioned below the password field. In the bottom right corner, there is a language selection dropdown menu currently set to "EN". The footer contains the copyright notice "(c) 2014 Magna Carta. All Rights Reserved" and the "magnacarta" logo.

Figure 2-1 User portal login screen

To log in to the user portal:

1. Enter the URL of the user portal in a web browser or click on a link that leads you to the user portal. You will see the login screen (Figure 2-1). If you are in a “Single sign-on” environment, i.e. if you link to the user portal from another application on your site where Single sign-on is implemented, you will go straight to the home page of the user portal and can go on to step 3 (the second sentence).
2. Enter your user name and password.
3. Click on the “Log in” button. You will see the home page of the user portal (examples in Figure 2-2 and Figure 2-3). If you have more than one card/ID you will first see your cards/IDs (Figure 2-4) and must select one before you see the home page for the selected card/ID.
 - In the section “Account details” you can see the balance of the card/ID, which privileges you have and various other details such as your name and card/ID number and status.
 - In the section “Top-ups” there are buttons for topping-up your balance with predefined amounts and/or buttons for topping up privilege counters. Which top-ups are available is decided by your site administrator. In the example in Figure 2-3 choosing the top-up “40 prints/copies” will augment the counter of a privilege which gives 100% discount on prints and copies by 40.
 - In the section “Transactions” (you might have to scroll down) you can see your last 18 transactions.
4. To switch the language of the user interface at any time select the desired language from the drop-down list in the top right hand corner (to permanently change the language see §2.1).
5. To log out at any time press the logout icon in the top right hand corner.

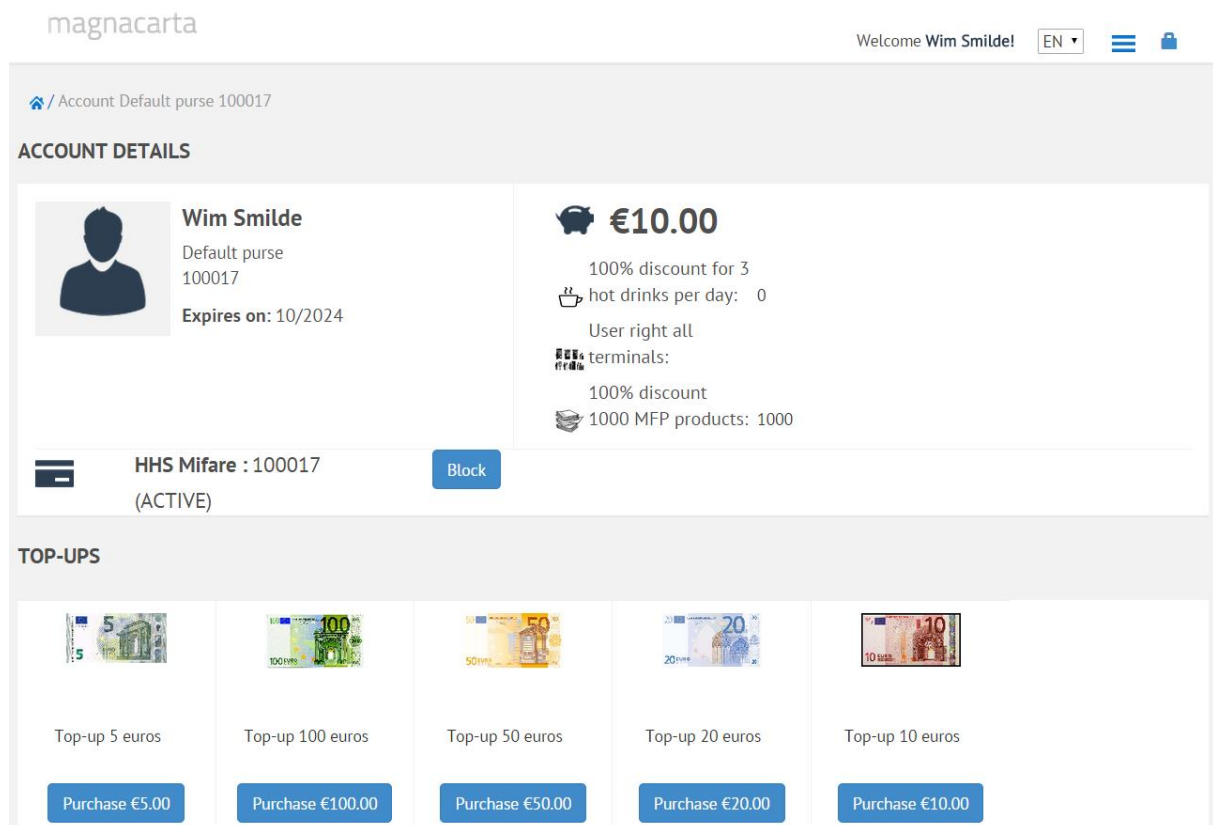


Figure 2-2 User portal home page for user Wim Smilde

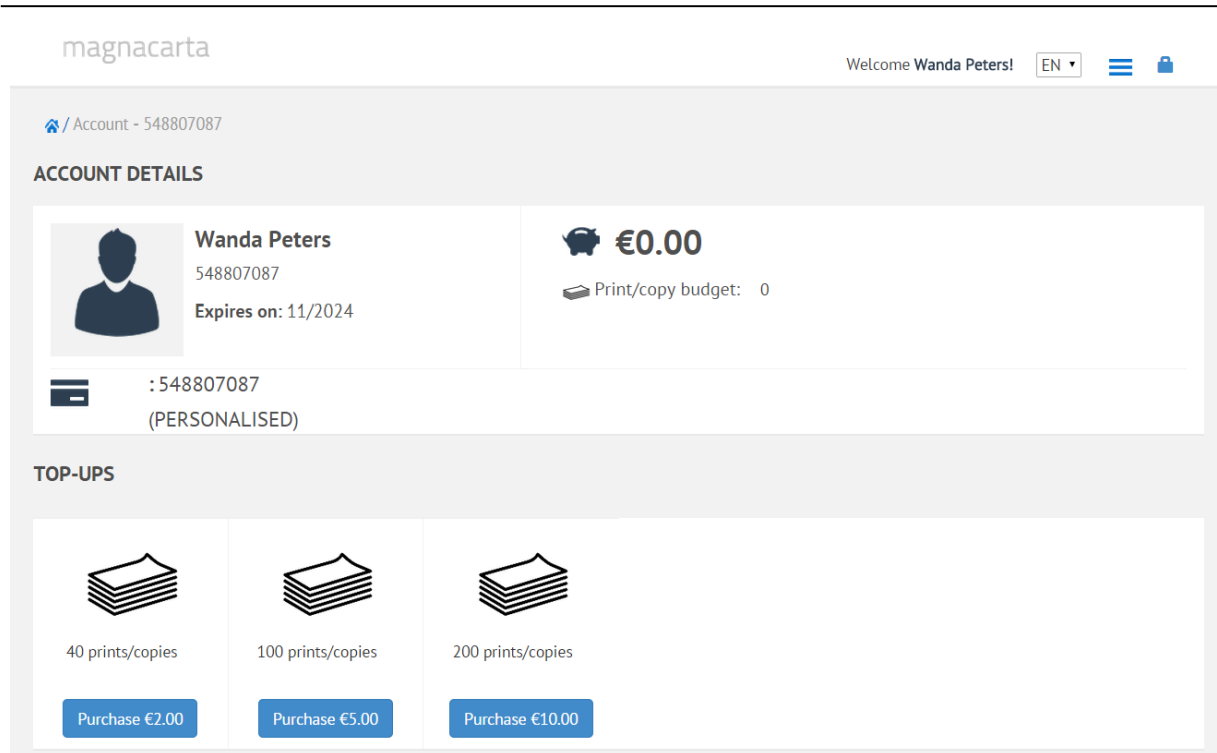


Figure 2-3 User portal home page for user Riet Koster

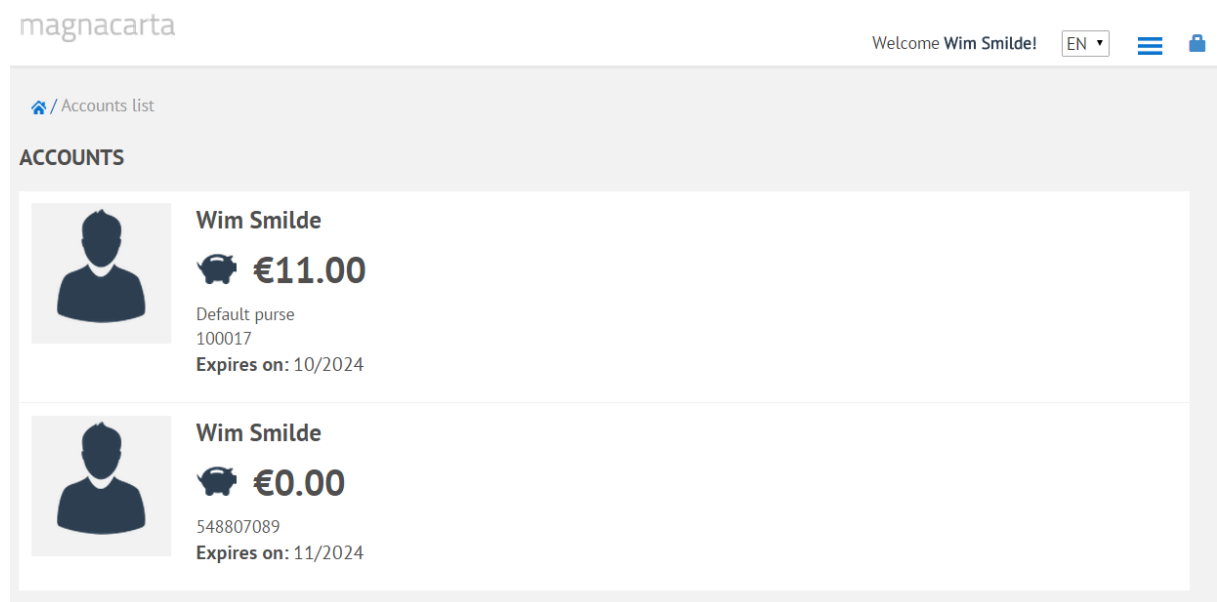


Figure 2-4 A list of the user's cards/IDs

2.1 CHANGING YOUR ACCOUNT SETTINGS

You can define which language to use in future upon login and which time zone to use.

To change your account settings:

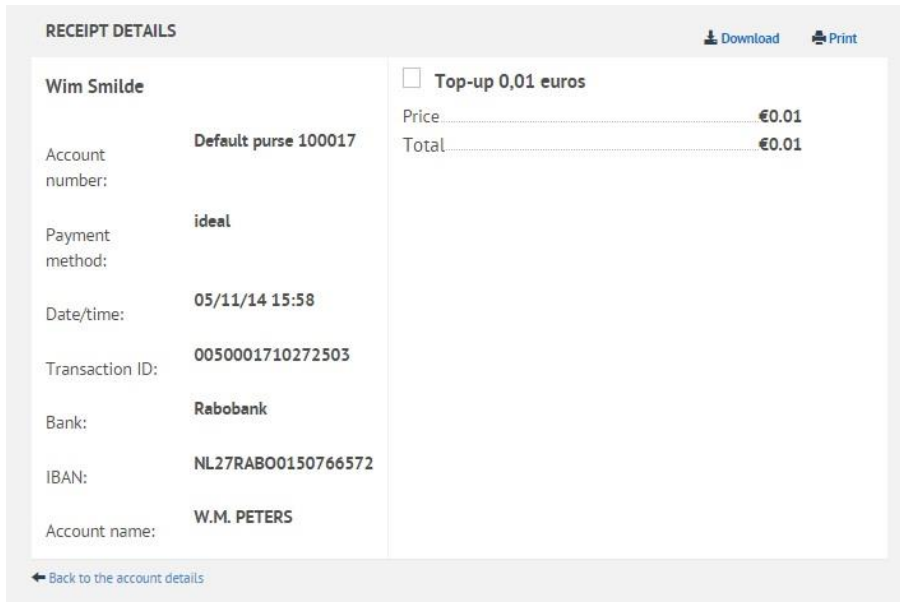
1. Log into the user portal (see §2).
2. Click the menu icon in the top right hand corner.
3. Select the desired language from the drop-down list in the field "Language".
4. Select the desired time zone from the drop-down list in the field "Time zone".
5. Click the "Save" button.

3 TOPPING UP

When you top-up your card/ID balance (whether on a back office account or on the card/ID) or the value of a privilege counter with the user portal you make a payment via an online payment system such as iDEAL or PayPal. Which online payment systems can be used differs per site.

To top up your card/ID balance or a privilege counter:

1. Log into the user portal (see §2).
2. From the home page of the card/ID you wish to reload, click on one of the available buttons in the section “Top-ups”. These can be top-ups to increase your card/ID balance, or to increase the counter of a privilege you have been assigned. If there are more choices than can be seen, click the “See more” button to show all choices.
3. In the “Payment method selection” page select your preferred method of payment.
4. If you have selected “iDEAL” in the previous section select your bank from the drop-down list.
5. Click the “Pay” button.
6. Carry out the payment in the usual way for that payment method. After a successful payment you will see the details of your payment (Figure 3-1).
7. Press the “Back to the account details” link to return to the home page.



The screenshot shows a receipt details page with the following information:

RECEIPT DETAILS		Download	Print
Wim Smilde		<input type="checkbox"/> Top-up 0,01 euros	
Account number:	Default purse 100017	Price	€0.01
Payment method:	ideal	Total	€0.01
Date/time:	05/11/14 15:58		
Transaction ID:	0050001710272503		
Bank:	Rabobank		
IBAN:	NL27RABO0150766572		
Account name:	W.M. PETERS		

← Back to the account details

Figure 3-1 Receipt details after topping up

4 BLOCKING YOUR CARD/ID

If you lose your card/ID and believe it has been stolen, you can block your card/ID so that the finder or thief cannot spend any money from the card/ID’s balance or any value from the card/ID’s privileges. You can only block a card/ID that has the card/ID status “Personalised”, “Issued”, “Active” or “Returned”.

If you have blocked your card/ID yourself, you can also unblock it. You might want to do this when you find your card/ID back after losing it. If your card/ID had been blocked by a system administrator, you cannot unblock it yourself. Only a system administrator can unblock it.

To block your card/ID:

1. Log into the user portal (see §2).
2. From the home page of the card/ID you wish to block, click the “Block” button. The card/ID status shown will change to “Blocked” and the “Block” button will change to an “Unblock” button.

To unblock a card/ID:


You can only unblock a card/ID that has the card/ID status “Blocked”.

1. Log into the user portal (see §2).
2. From the home page of the card/ID you wish to unblock, click the “Unblock” button. The card/ID status shown will change to “Issued” and the “Unblock” button will change to a “Block” button.

5 VIEWING YOUR TRANSACTION HISTORY

To view your transaction history:

1. Log into the user portal (see §2).
2. On the home page in the section “Transactions” you can see a number of your most recent transactions. (How many you see is determined by your system administrator). If you wish to see more transactions, or if you want to see the transactions in a certain period or of a certain amount, click the “See more” button. You will see all previous transactions, the most recent on top. You can scroll through the transactions.
3. If you want to see the transactions of a particular period fill in a value for two timestamp fields and then press the “Apply” button.
4. If you want to see the transactions of a particular amount fill in a value for two amount fields and then press the “Apply” button.
5. If you wish to clear the restrictions press the “Reset” button and then press the “Apply” button.
6. If you wish to download the transactions to a csv file press the “Export CSV” button. The transactions will be saved in a document named “TransactionsReport.csv” in the download directory of your computer.

You can press the home icon  in the top left hand corner at any time to return to the user portal home page.

6 ACTIVATING YOUR CARD/ID

On some sites cards/IDs are not coupled to a specific user until the user activates the card/ID from the user portal. The card/ID is distributed to the user with an activation code (by the card/ID producer). The user must then log in to the user portal and activate the card/ID. In effect he actually registers the card/ID as his card/ID, so that any privileges pertaining to him as a user will also be applied when the card/ID is used at a terminal, and so that he can manage the card/ID in the user portal, i.e. top-up his card/ID balance or a privilege counter, block or unblock his card/ID and view the transaction history.

To activate your card/ID:

1. Log into the user portal (see §2).
2. From the home page, click the “Activate card/ID” button. You will see the pop-up screen shown in Figure 6-1.
3. Enter the card/ID number and activation code.
4. Click “Activate”.



Activate card/ID

×

Card/ID number

Activation code

Cancel

Activate

Figure 6-1 Activate card/ID pop-up screen