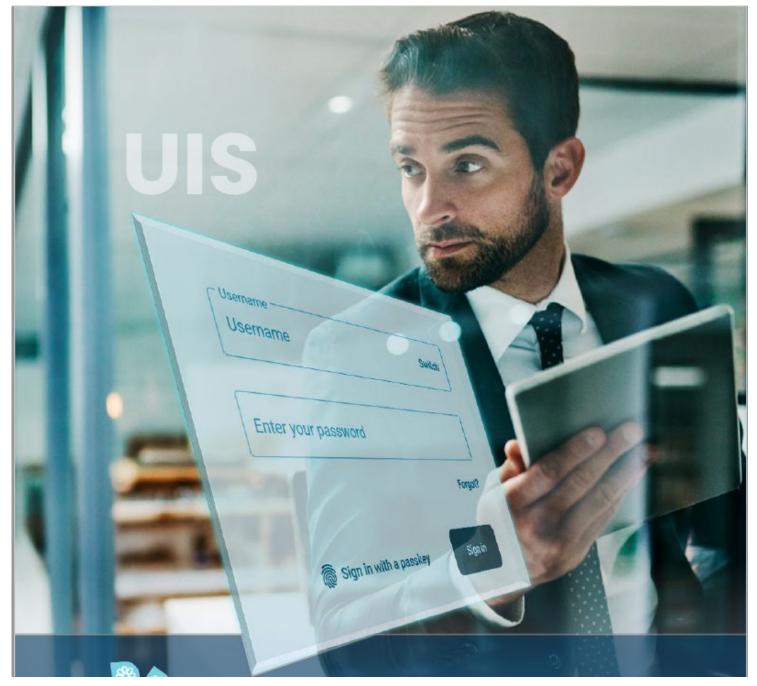
#### **Treasury Management**

# unified identity service (UIS) enrollment reference guide





#### 1. Users that have logged in the past 45 days will receive an enrollment email.

Online Enrollment Information
To       ◇ Jessica Kenney         Retention Policy       365-Day Item Mailbox Retention (Permanently Delete) (1 year)
Hello Madelyn Jones,
You have been enrolled in Treasury Management at TM Bk201 9427 TREASURY.
Using the Digital ID enrollment link below, please use the Company ID and User ID credentials provided to you to create a Digital Identity that you will use for all subsequent logins.
The enrollment link allows for entry of the Company ID and User ID credentials provided and will prompt you to establish a digital username and password. In addition, you will be prompted to establish a 2-step verification method to be used at login.
Once your digital identity is created, you will be logged in to Treasury Management where you will complete authentication setup for high-risk transactions and activities. You will be directed to the Fox Trot Dashboard after acknowledging the Terms & Conditions.
If you have any questions, please contact us directly:
Treasury Customer Support <u>treasury®westshorebank.com</u> 231-845-3580
Digital ID enrollment link: https://treasury.jackhenry.com/westshore/user-enrollment?code=53c72014-fd14-40c7-81da
Subsequent logins (please use this link for your bookmark): https://treasury.jackhenry.com/westshore

2. The Digital ID enrollment link will direct users to enter the Company and Login IDs provided. This link is good for 7 days and enrollment must be completed in 45 minutes.

Login		Login					
	ry Company ID and Treasury User ID to begin the enrollment process. You will be plete profile details, as well as select a user name and password.				User ID to begin the enrollment process. You will be select a user name and password.		
Company ID *	Enter Company ID	$\rightarrow$	Company ID *	Foxtrot			
Login ID *	Enter Login ID		Login ID *	mjones			
Submit	Reset		Submit	Reset			



3. Users will be prompted to create their Treasury profile and Digital ID.

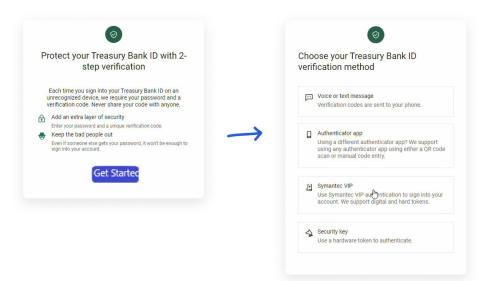
		WE	ST SH	ORE	BANK			
(i)	Create your Treasury Bank ID to establish your account access.							
	2	ζ Crea	ite my	Treas	ury Bar	nk ID		
ALREADY Login to				RY BAN				
	link			RY BAN				

- a. Step 1 of User ID: Users will complete & verify profile information.
- b. Step 2 of User ID: Users will create their credentials. This Username/Digital ID and Password will be used for subsequent logins.

	<
WEST SHORE BANK	WEST SHORE BANK
<ul> <li>Create your Treasury Bank ID to establish your account access.</li> </ul>	Create your Treasury Bank ID credentials
	Username
Create your Treasury Bank ID	mjonesuis
Verify your profile information	Show rules
First name (Required)	C Password
Madelyn	
Last name (Required)	Show rules
Jones	
Email	Confirm password
C Email (Required)	
jkenney@jackhenry.com	
	Next
Phone Number	
Country	
+1 Home	
US/Canada	
Country Mobile	
+1	
US/Canada	
Country Work	
US/Canada	
Next	



4. Users will protect their accounts with 2-step verification and choose their preferred method.



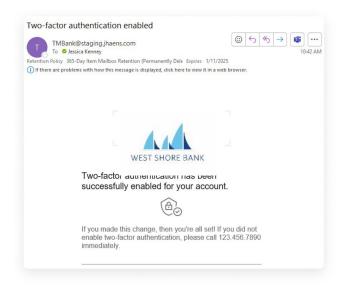
#### **2-Step Verification Methods**

Users will have the option to choose from 4 different verification methods: voice or text message, authenticator app, Symentec VIP, or a security key.

Voice or text message	Authenticator app
Cutt's set up your phone Provide a phone number that we have on file. On sign in, this number will be used to contact you with a unique verification code to confirm it's you. Message and data rates may apply.	Use an authenticator app Use an authenticator app Devended a five authenticator spay, add a user account, and then scan the QF code to set us your account of the scan the QF code to set us your provide the scan the user and the QF code to set us your account of the scan the QF code to set us your provide the scan the user and the scan the QF code to set us you account of the scan the user and the scan the QF code to set us you account of the scan the user and the scan the QF code to set us you account of the scan the user and the scan the QF code to set us you account of the scan the user and the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan the scan the scan the QF code to set us you account of the scan the scan the QF code to set us you account of the scan th
+ 1 US/Canada Need help?	ooxtsMaRPHouwisUMisWovCMDUF2RBrinkeorwitooscoki2xLM20 Verification code
Symantec VIP	Security key
C Symantec VIP To register with Symantec VIP please enter the serial number/credential ID exactly as it appears on your device.	< Control of the security key. Control of the
Serial number or credential ID Next Need netpr	Friendly name Register Need nelp?



5. When complete, the user receives an email confirming 2FA verification setup.



### frequently asked questions

#### Can a user keep their existing username?

It is possible that the user's existing Login ID can be used again, however usernames now need to be unique across the entire database. In many cases a new username will have to be chosen, especially if there are many users with the Username of Admin. One way to choose a username that will already be familiar is to use a combination of the existing Company ID plus the existing Login ID. For example, a Company ID of C102345 with a Login ID of janedoe could be a UIS ID of C102345 anedoe.

#### What if an end user currently logs into multiple companies? \*

During migration, each user will receive an email to create their Digital ID. If the same email address is tied to more than one user, whether a different company or the same company, each will receive an individual email. The first email link clicked on will take the user through the steps outlined above. When they click the link in the second (or third) email, they will be able to use the "Already have a Treasury Bank ID?" Login to link an additional account. Upon entering their Digital ID their accounts will be linked together under that digital ID. Upon subsequent logins the user will get to choose which company they want to access.

Please note if you are a QuickBooks user for multiple companies using DirectConnect or WebConnect linking your accounts to a single digital ID is not recommended.

#### What are the new rules for creating a username?

Usernames must be between 4 and 64 characters in length.

Usernames can contain letters (a-z), numbers (0-9), dashes (-), underscores (\_), apostrophes ('), and periods (.) and can begin or end with non-alphanumeric characters except periods (.) and spaces. Usernames cannot contain more than one period (.) in a row, accents, accented letters, ampersands (&), equal signs (=), brackets (<,>), plus signs (+), at signs (@), or commas (,).

#### What are the new rules for creating a password?

Passwords must be between 8 and 64 characters in length.

All ASCII and Unicode characters (including spaces) are supported for passwords.

Passwords must not match or contain your username and must not begin or end with a space. Passwords will not expire.

#### Can users lock themselves out with UIS at login?

Users can be locked with multiple failed 2FA verification attempts, with varying failed attempts based on the authentication method. Users cannot be locked out due to invalid password attempts.

## Can the 'Don't ask for codes again while using this browser' feature be enabled with the UIS login?

Yes, it can be enabled. The 'remember this browser' feature is tied to the browser that is used during selection of the 2FA method. If a brute-force attack was attempted, or a login from a different browser was attempted, 2FA prompts would occur and access would not be granted until successfully validated using one of the established 2FA methods. Additionally, users that integration with Intuit services (QuickBooks Online/QBO/Express Web Connect) will need to elect this feature for the third-party service to work successfully.

### We're here for you every step of the way

We hope that you're as excited about this new journey as we are. If you have any additional questions or concerns, please reach out—we're happy to help in whatever way we can. Call us at 231-845-3580 or email at <a href="mailto:treasurycustomerservice@westshorebank.com">treasurycustomerservice@westshorebank.com</a>. As always, thank you for trusting us to serve you!