

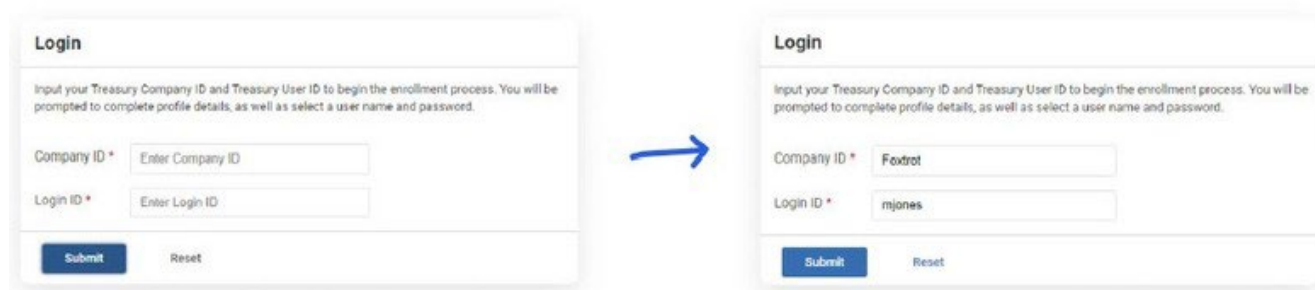
Treasury Management

# Unified Identity Service (UIS) Enrollment Reference Guide



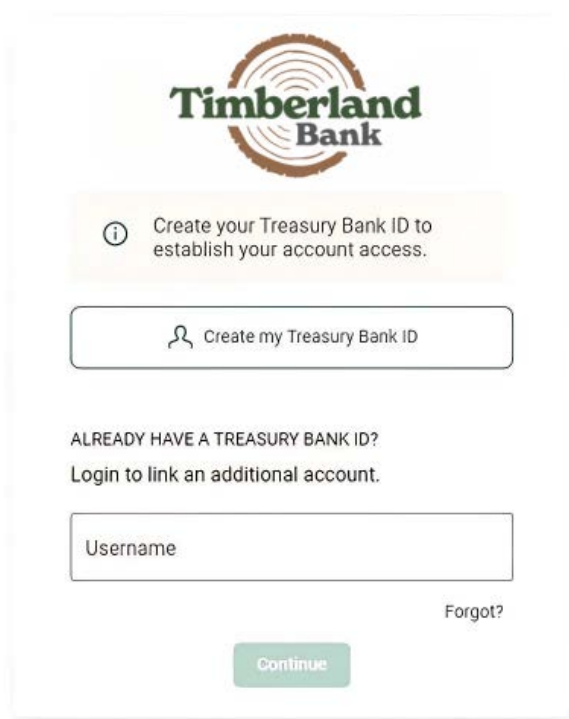
# User Experience

1. Active users that have logged in 45 days prior will receive an enrollment email.
2. The Digital ID enrollment link will direct users to enter the Company ID and Login IDs currently used for online access. Action must be taken within 7 days of being issued. Once the link is clicked, enrollment must be completed within 45 minutes.



The diagram illustrates the user experience flow for the login process. It shows two versions of a 'Login' form. The first form is a generic template with placeholder text: 'Input your Treasury Company ID and Treasury User ID to begin the enrollment process. You will be prompted to complete profile details, as well as select a user name and password.' It features two input fields: 'Company ID \*' with the placeholder 'Enter Company ID' and 'Login ID \*' with the placeholder 'Enter Login ID'. Below the fields are 'Submit' and 'Reset' buttons. A blue arrow points to the second form, which is the same template but with pre-filled values: 'Company ID \*' contains 'Fox trot' and 'Login ID \*' contains 'mjones'.

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



The screenshot shows the 'Timberland Bank' logo at the top. Below it is a yellow information box with an 'i' icon and the text: 'Create your Treasury Bank ID to establish your account access.' Underneath is a button with a person icon and the text 'Create my Treasury Bank ID'. Below that is the text 'ALREADY HAVE A TREASURY BANK ID?' followed by 'Login to link an additional account.' There is a 'Username' input field, a 'Forgot?' link, and a green 'Continue' button at the bottom.

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

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 Create your Treasury Bank ID to establish your account access.

## Create your Treasury Bank ID

Verify your profile information

First name (Required)

Last name (Required)

**Email**

Email (Required)

**Phone Number**

Country

US/Canada

Country

US/Canada


Country

US/Canada

**Next**



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## Create your Treasury Bank ID credentials

Username

Show rules

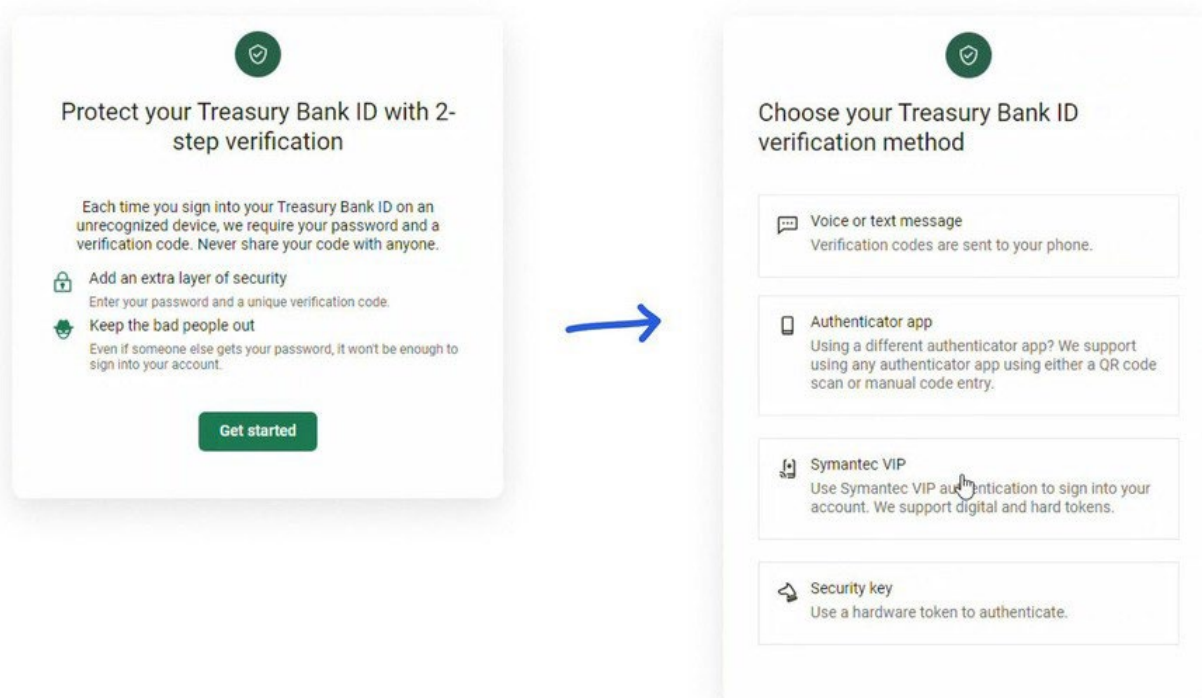
Password

Show rules

Confirm password

**Next**

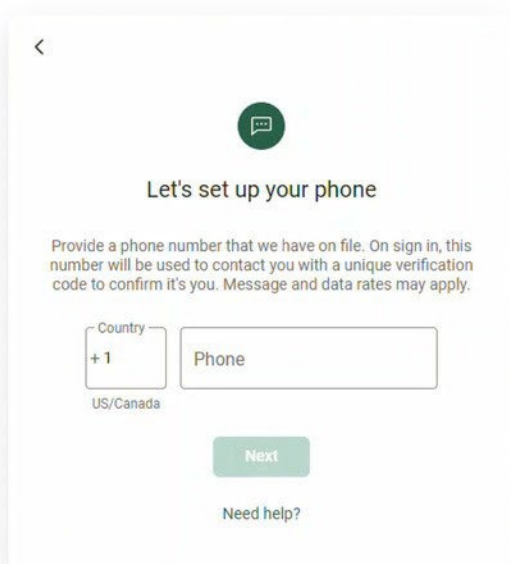
#### 4. Users will protect their accounts with 2-step verification and choose their preferred method.




## 2-Factor Verification Methods

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

### Voice or text message



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Let'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.

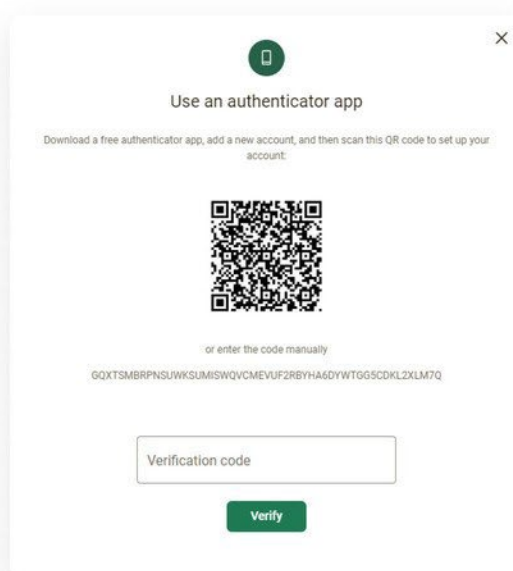
Country  
+1  
US/Canada

Phone


Next

Need help?

### Authenticator app




< X



Use an authenticator app

Download a free authenticator app, add a new account, and then scan this QR code to set up your account:



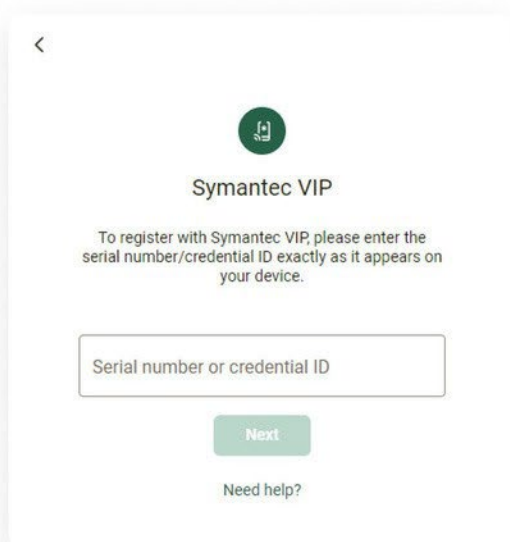
or enter the code manually

GQXTSMBRPNSUWKSUMISWQVCMFVUF2RBYHA6DYWTGG5CDKL2XLM7Q


Verification code

Verify

### Symantec VIP



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Symantec VIP

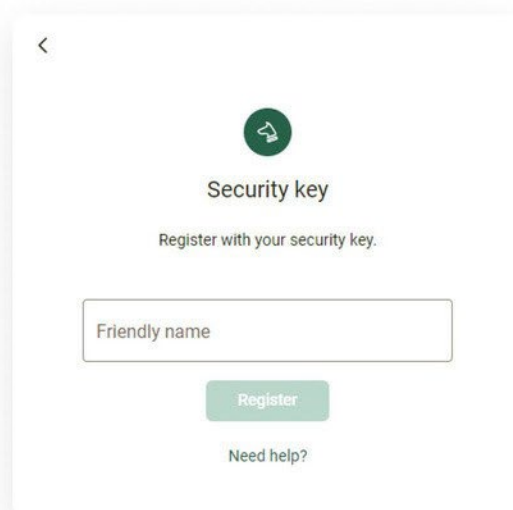
To register with Symantec VIP, please enter the serial number/credential ID exactly as it appears on your device.

Serial number or credential ID


Next

Need help?

### Security key



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Security key

Register with your security key.

Friendly name

Register

Need help?

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



Two-factor authentication has been successfully enabled for your account.



If you made this change, then you're all set! If you did not enable two-factor authentication, please call 123.456.7890 immediately.

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# 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.

## **What if the user 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.

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

Username must be between 4 and 64 characters in length.

Username can contain letters (a-z), dashes (-), underscores (\_), apostrophes (') and periods (.) and can begin or end with non-alphanumeric characters except periods (.) and spaces.

Username cannot contain more than one period (.) in a row, accented letters, ampersands (&), equal signs (=), brackets (<,>), plus signs (+), at signs (@), or commas (,).

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

Password must be between 8 and 64 characters in length.

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

Password must not match or contain your username and must not begin or end with 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 integrate 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 are 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 360-438-1400 ext.1044 or email at  
Cashmanagement@timberlandbank.com**

**As always, thank you for trusting us to serve you!**

