

ADMIN GUIDE

My Co-op Delegated Admin Console Guide

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Introduction

Description and initial setup

The My Co-op Delegated Admin Console is the web-based tool for your financial institution to manage your My Co-op users and their application access. The initial person that your organization designates as a Power Admin will set up all the My Co-op users for your organization.

The Delegated Admin Console enables your Power Admin(s)* to create, disable, and delete users; change attributes for users; assign users to application groups; and remove users from groups. Your Power Admins can reset passwords for your My Co-op users.

**Co-op sets up the initial Power Admin you designate. That Power Admin will create all the other My Co-op users for your organization, including any additional Power Admins you may want.*

System requirements

Web Browser – Users access the Delegated Admin Console via a web browser. The latest versions of Google Chrome, Mozilla Firefox, or Microsoft Edge, are recommended, although the current version and the two previous versions are supported.

My Co-op documentation

Video training modules and technical documentation are available to support you and your users. The resources can be found in either of the following places:

- At <https://insights.co-opfs.org/myco-op-resources>
- In the Co-op Knowledge Center within My Co-op. Open the Knowledge Center and search for “MyCo-op”.

Pre-rollout and admin guides

- **My Co-op Pre-rollout Checklist** – An overview of steps to help your organization plan a successful rollout of My Co-op.
- **My Co-op Client Leader Guide** – A detailed overview for staff at your organization who will lead the rollout and the use of My Co-op, including a **sample email script** to use as a starting point for the message you send to new users after they are set up with access to My Co-op.
- **My Co-op Delegated Admin Console Guide** – Description and instructions for your Power Users of the Delegated Admin Console, who manage My Co-op users by creating and deleting them, assigning users to groups, and resetting passwords (users can also reset their own passwords at the sign-on screen). The Delegated Admin Console Guide and this guide have a sample email script to use as a starting point for the message you send to new users after they are set up with access to My Co-op.
- **My Co-op Application User Group Matrix and Glossary** – A document containing a list of the user groups and the applications assigned to each user group, as well as an application glossary.

- **My Co-op Delegated Admin Console Quick Reference Guide** – A short, task-based guide containing steps for your admins who set up My Co-op users.

End-user guides

- **My Co-op Quick Reference Guide** – A brief guide to assist users as they sign on to the My Co-op platform for the first time.
- **My Co-op End-User Guide** – Detailed procedures and FAQs to guide your staff as they access and use My Co-op.

Administration privilege levels

Only My Co-op users with administration privilege levels can access the Delegated Admin Console. The administration privilege level determines which users the user can manage (if any). The standard user cannot access the Delegated Admin Console.

Power Admin

The Power Admin can make changes for all users at their organization. By default, the Power Admin can make changes for all users in the same organization as the Power Admin.

Help Desk User

The Help Desk User has read-only access to My Co-op users at their organization. Help-Desk Users can verify access levels for other My Co-op users and refer those users to Power Admins if a different access level is needed.

Business Power Admin

The Business Power Admin is used only for organizations that serve multiple credit unions. The Business Power Admin can make changes for all users of all organizations that the business partner serves. Apart from the ability to make changes for multiple organizations, the Business Power Admin has the same access as a Power Admin.

Sign on and sign out

Sign on

To sign on to the Delegated Admin Console:

1. Sign on to My Co-op.

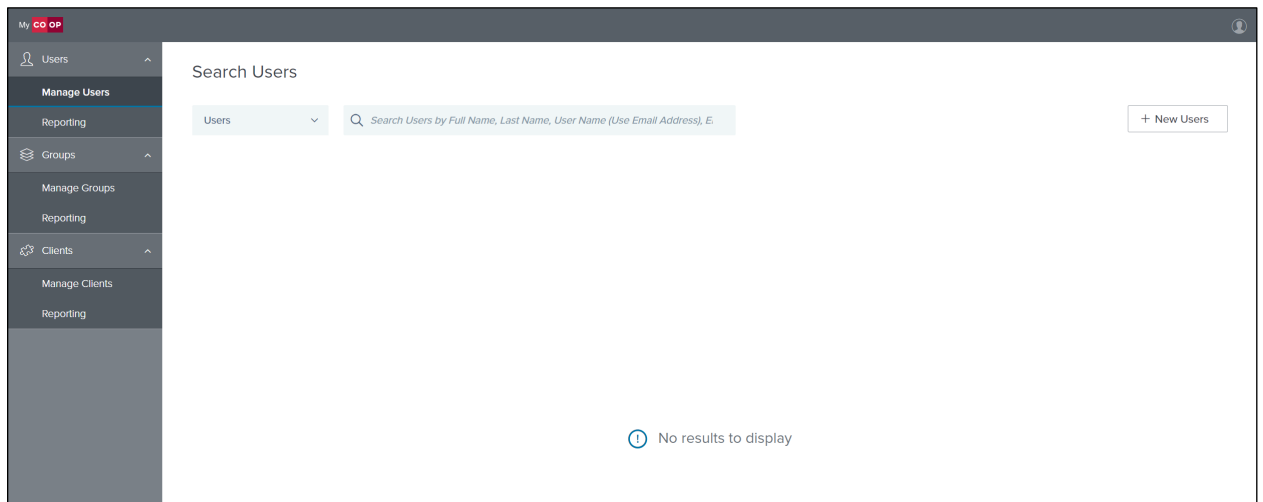
Note

Detailed instructions for first-time access to My Co-op are in the My Co-op End-User Guide and the End-User Quick Reference Guide.

2. On the My Co-op main page, click the icon for the Delegated Admin Console, which appears along with other application icons.




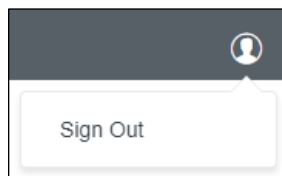
Delegated Admin Console opens.



Sign out

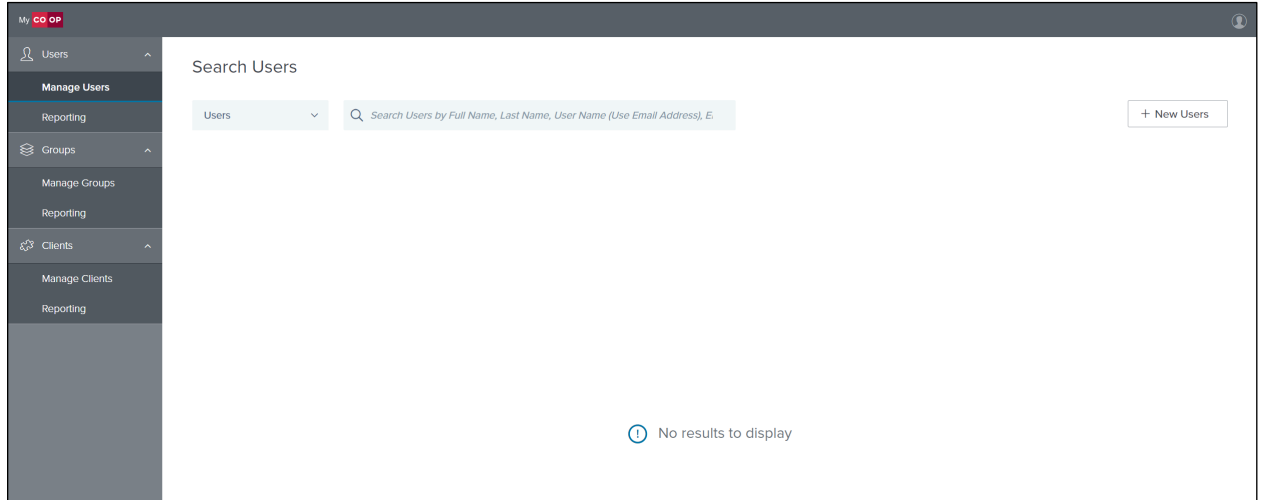
To sign out:

- Click the user icon in the upper right corner of the console  and select **Sign Out**.



Delegated Admin Console screen

The main parts of the Delegated Admin Console interface are the navigation pane, on the left, and the work area, on the right.



Select an item in the navigation pane to specify what you want to do, and the work area displays the controls that you need to perform the task.

Search for users and groups

Search for a user

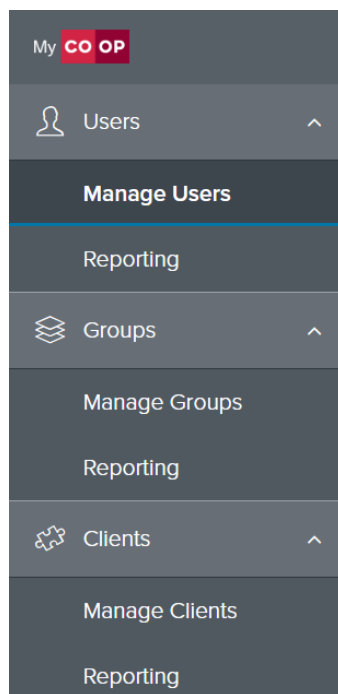
As an administrator, you can view the profiles and group memberships of all users within your organization (or organizations for Business Power Users). As an administrator, you can also make changes to those profiles and group memberships.

Note

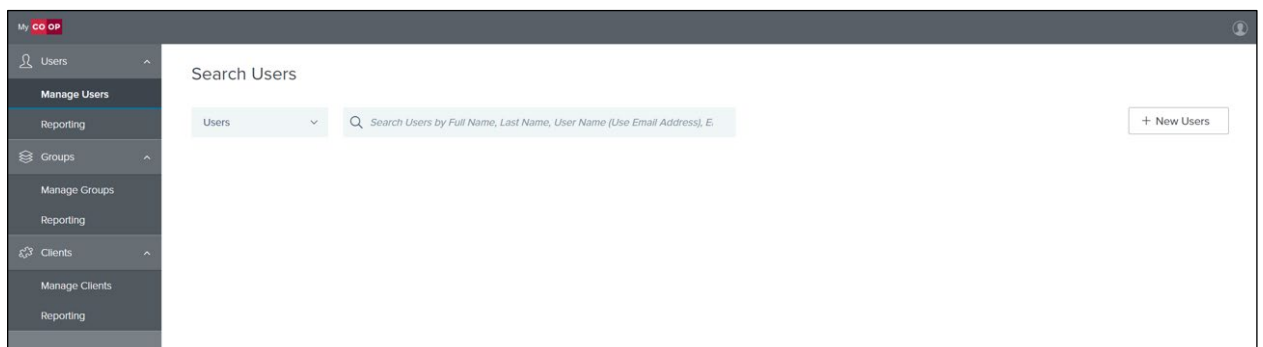
To create a user or take action on a user's account or the groups the user belongs to, see [Users](#).

To search for a user:

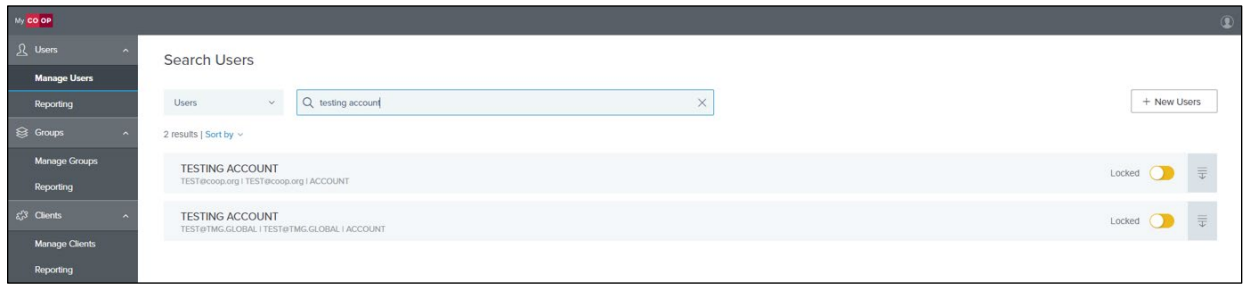
1. In the navigation pane under **Users**, select **Manage Users**.



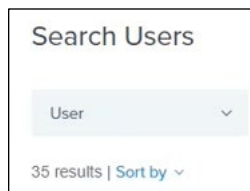
2. In the search field, enter any portion of the user's full name and press **Enter**. Search is not case sensitive. To limit the search results, enter as much of the name as you can.




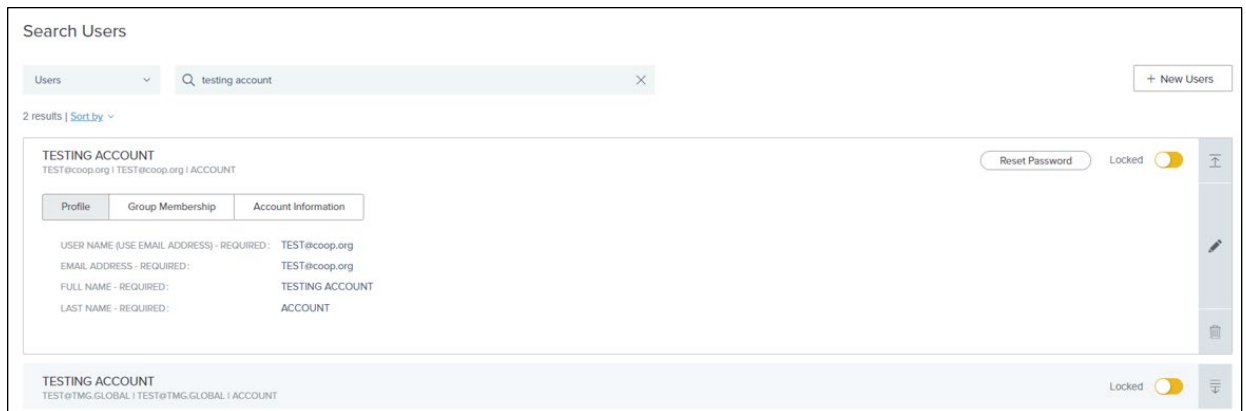
Results appear below the search field. If there are too many results, you are prompted to enter more of the user's name to limit the search further.



- **To sort the list by full name:** Click **Sort by** and select a sort order.



- **To view details about a user:** Click the expand icon  for that user.



- **To view a list of the groups that a user belongs to:** Click **Group Membership**.



Search for a group

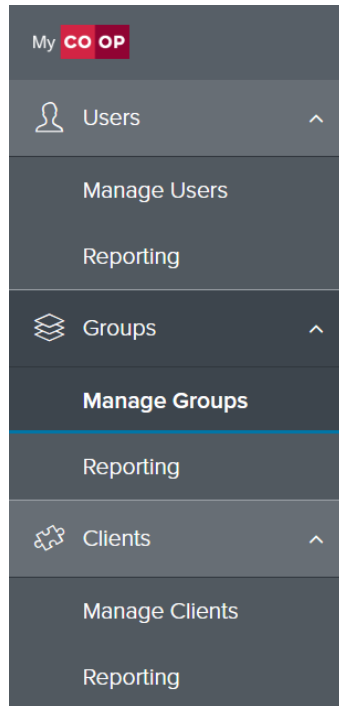
Delegated Admins can view all members within their organization (or organizations for Business Power Admins) that are members of various groups.

Note

For more information about groups and managing them, see *Groups*.

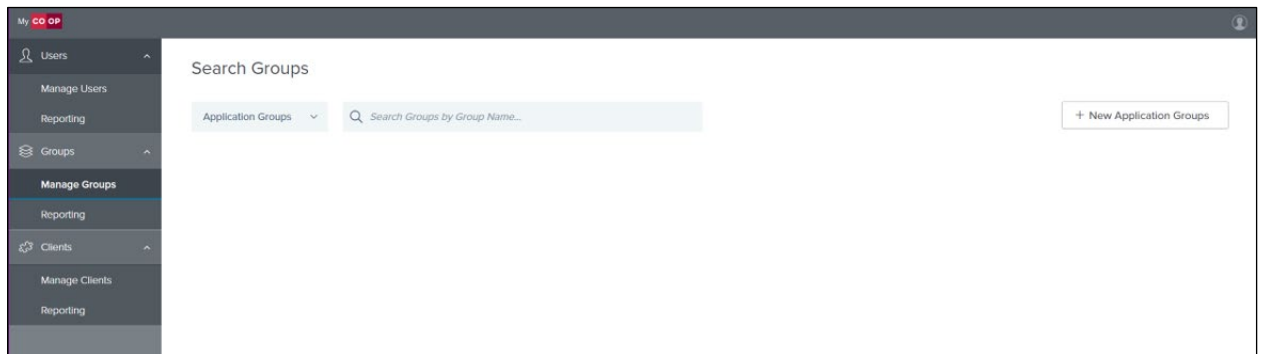
To search for a group:

- In the navigation pane under **Groups**, select **Manage Groups**.



Note

When the Search Groups screen first appears, it indicates there are no results to display yet. You need to perform an action to display all groups or to find only certain ones.



- **To display all groups:** Put the cursor in the search field, press **Enter**.

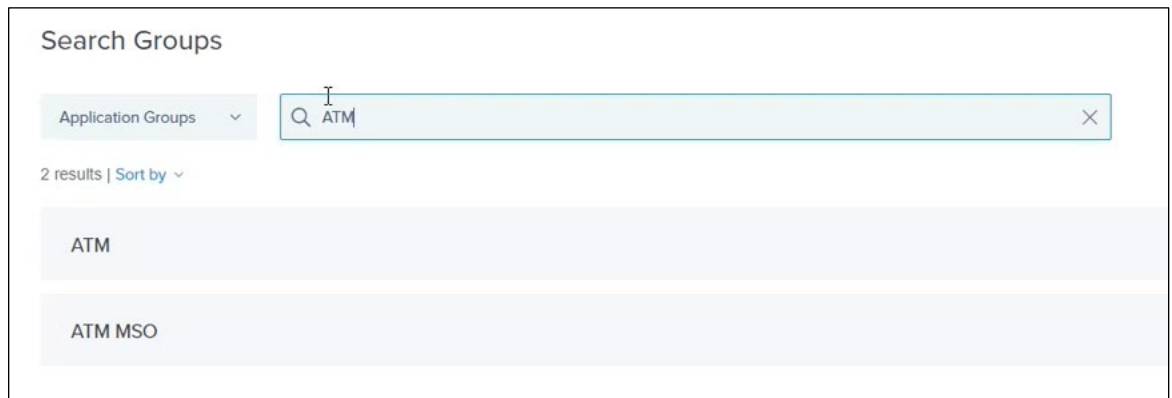


- **To find groups:** Enter search criteria, and press **Enter**.

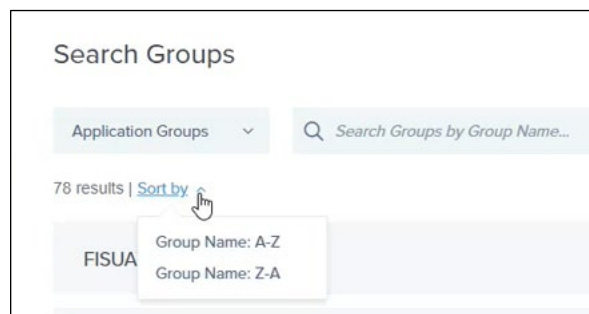
Note


To determine applicable groups for your users, see the *My Co-op Application User Group Matrix and Application Glossary*.

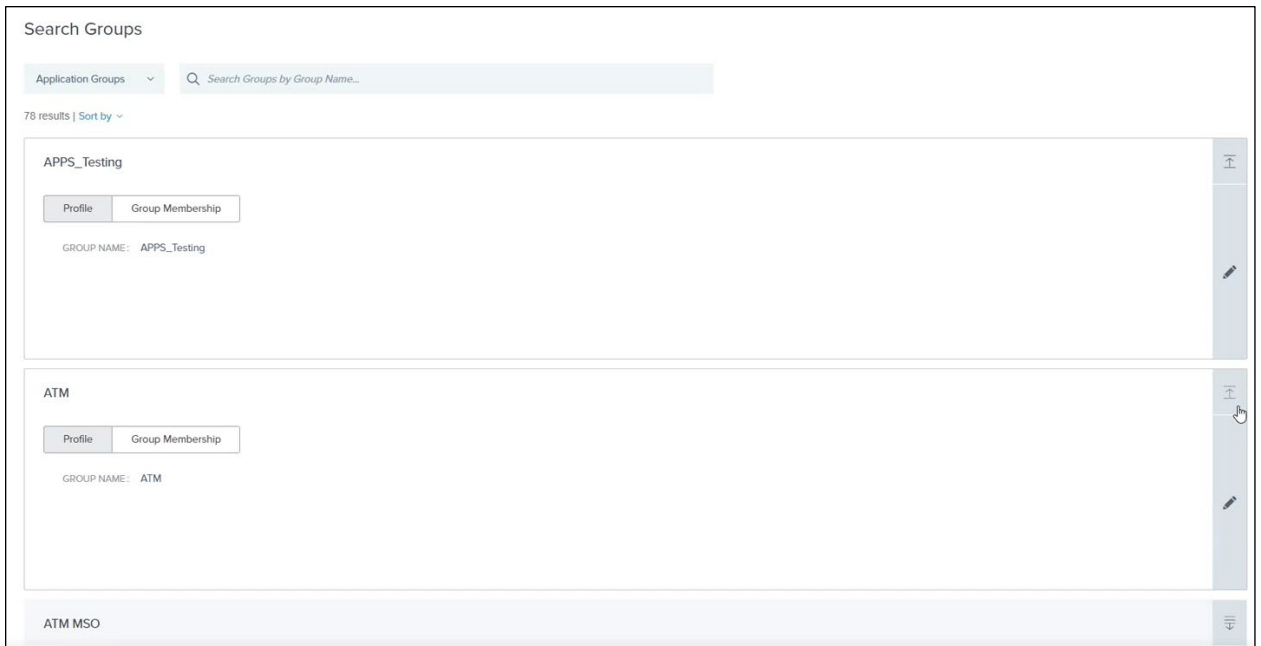
- **To clear search results and display all groups:** Delete the text from the search field, and with the cursor in the search field, press **Enter**.



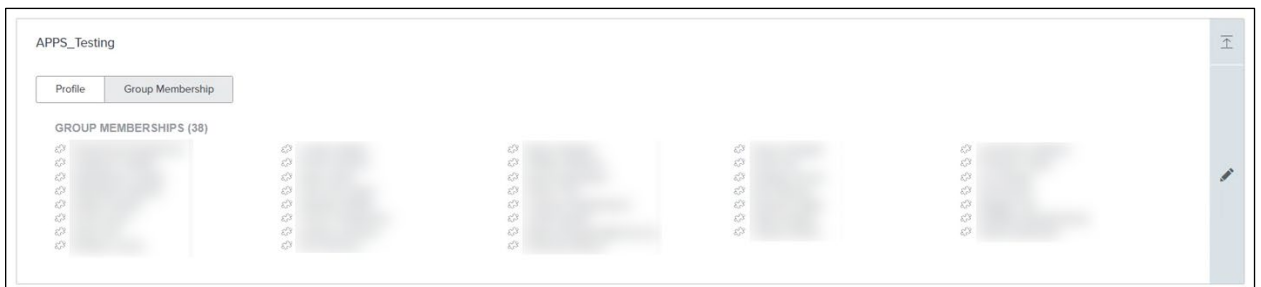
- **To sort a list by group name:** Click **Sort by**, and select an order.



- **To view details about a group:** Click the expand icon  for that group.



- **To view a list of the users in the group:** Click **Group Membership**.



- **To hide details about a group:** Click the collapse icon .

Users

You can add your financial institution’s users to My Co-op using the Delegated Admin Console, and you can create other administrators. This section also describes how to create users, change user attributes, manage group membership, disable users, and delete users.

Note

After you create a user and they sign on for the first time, they will receive an email for multifactor authentication (MFA) setup from “Ping Identity” or “PingID.” If users do not receive an email during the MFA process, they may need to check their email’s spam filter and add the domain “@pingidentity.com” to their safe senders list.

Email that the user receives when their password is changed will come from “@coop.org”.

Create users

Before you begin:

- **Use the search function to ensure there is not already a My Co-op account for the email address you want to use.**

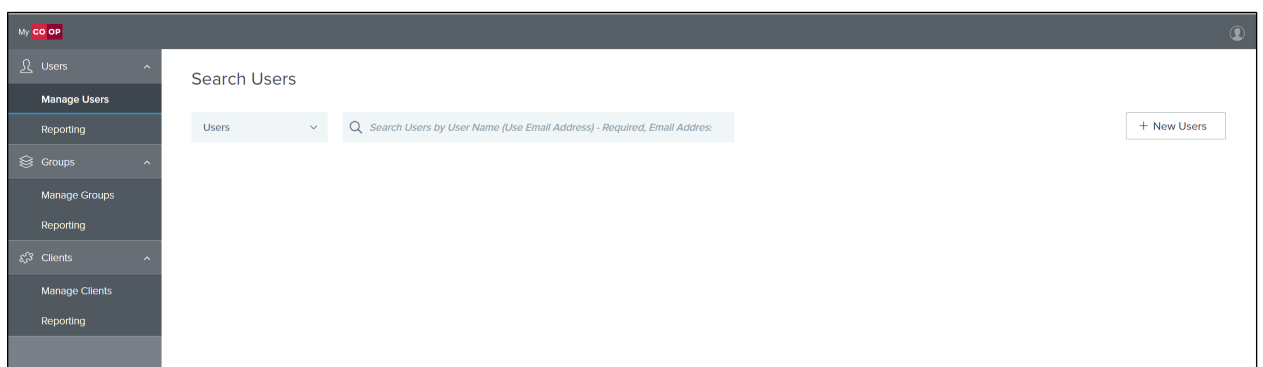
If you create an account with the same username as an existing account, the user will not be able to sign on, and you will need to delete one of the accounts.

- **Have a list of the required and optional attributes that you need to enter for the user.**

For a list and description of attributes, see [User attributes](#).

To create a user:

1. Select the **+ New Users** button in the upper right corner of the Manage Users screen.



The New Users screen appears.

The following two pictures show fields that display on the New Users screen as you scroll down. Directions on what to complete follow, in step 2.

Note

Required fields have a yellow bar on the left.

The screenshot shows a mobile-style form titled "New Users" with a close button in the top right. The form is organized into sections:

- SELECT A TYPE:** A dropdown menu currently showing "Users".
- SELECT FROM CLIENTS:** A dropdown menu currently showing "People".
- PASSWORD - REQUIRED:** A text input field with a "Generate Password" link below it.
- USER NAME (USE EMAIL ADDRESS) - REQUIRED:** A text input field with a yellow bar on the left.
- EMAIL ADDRESS - REQUIRED:** A text input field.
- FULL NAME - REQUIRED:** A text input field with a yellow bar on the left.
- FIRST NAME:** A text input field.
- LAST NAME - REQUIRED:** A text input field with a yellow bar on the left.
- ADMIN LEVEL (SUPER | HELP-DESK | BUSINESSPOWER | POWER):** A dropdown menu at the bottom.

CLIENT NAME

CLIENT ID

AFFILIATED BUSINESS PARTNER

SPRINGBOARD ORG ID

SPRINGBOARD USERNAME

SPRINGBOARD EXPANDED USERNAME

FIS

BETA SPRINGBOARD USER ID

SPRINGBOARD BETA MX USERNAME

2. Complete the applicable fields (required fields have a yellow bar on the left), and click **Save**.

Select a Type – Leave this as User.

Select from Clients –Your financial institution is already filled in.

Password – It is recommended to use the

Generate Password option. Copy the temporary password provided and securely provide it to the new user. Alternatively, type a temporary password and securely provide it to the new user.

Password requirements

- At least 8 characters
- At least 1 special character
- At least 1 number
- At least 1 lowercase letter
- At least 1 uppercase letter
- Password not used previously in the last year
- No more than 2 duplicate characters

Client ID – Four-digit Client ID provided by Co-op.

Client Name – Name of your financial institution should appear here. Business Power Admin will need to select the FI to which the user belongs.

First Name – First name of the user.

Full Name – First and last name of the user.

Last Name – Last name of the user.

Administration Privilege Level – Privilege level of the user. For regular users: leave blank. For admins who will use the DAC, type “Power”.

Springboard Org ID – If your financial institution uses Springboard, fill in your four-digit Client ID provided by Co-op.

Springboard Username – If your financial institution uses Springboard, type the user’s Springboard username. Typically this an email address.

Username – My Co-op username; to ensure a unique identifier, the user’s work email address should be used. Avoid using personal email addresses for user accounts.

The remaining fields on the New User screen are optional, depending on the products that your financial institution has and the applications to which the user needs access.

3. Select **Save**.



4. Add the user to groups as needed. For more information about how to add users to groups, see *Manage group membership for users* in this guide.

User attributes

User attributes are listed in the following table, with a description of each attribute and some examples of valid attributes. The table also indicates whether each attribute is required for all users. Attributes that are not required for all users might be required when launching a SAML-enabled application from My Co-op.

Field name	Description	Example	Reqd?
SELECT FROM CLIENTS	Client <i>(Available to Business Power Admins only; only clients managed by the business partner are available)</i>	Sample Client	Yes
PASSWORD	Password <i>For password policy requirements, see Reset a user's password in this guide.</i>	1234P@ssw0rd	Yes
CLIENT ID	Your four-digit client ID. If you do not know this, contact Client Care.	9999	No
CLIENT NAME	Name of client <i>For all but Business Power Admins, this is the name of your institution.</i>	Sample Credit Union	Yes
FIRST NAME	User first name	Sue	No
AFFILIATED BUSINESS PARTNER	Name of business partner that employs the user, if applicable	Partner Corporation	No
FULL NAME	Full username	Sue Smith	Yes
LAST NAME	User last name	Smith	Yes
ADMIN LEVEL	Assigns a user to have rights to access Delegated Admin Console. Case-sensitive. <i>For more information, see Administration privilege levels in this guide.</i>	Businesspower power helpdesk	No
BETA SPRINGBOARD USER ID	Beta Springboard username	sue.smith	No
FIS	Primary FIS application ID. <i>Depends on what the user considers to be their main ID. During setup, users should be asked which is their primary FIS ID, which is the one that they typically use for most of their daily card and/or ATM related tasks.</i>	sue.smith@sample.com	No
SPRINGBOARD ORG ID	Same as Client ID; 4-digit client identifier provided by Co-op Note This attribute is also used for Insights Center.	9999	No

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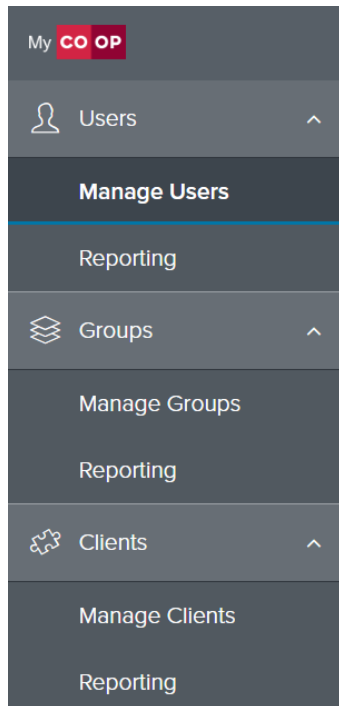
Field name	Description	Example	Reqd?
SPRINGBOARD USERNAME	Springboard username. Note This attribute is also used for Insights Center.	sue.smith@sample.com	No
EMAIL ADDRESS	Work email address	sue.smith@sample.com	No
USER NAME	Work email address	sue.smith@sample.com	Yes
APPFISID2	Secondary Desktop Director FIS application ID. <i>During setup, users should be asked which is their secondary FIS ID, which is the one that was set up for PaymentsOne.</i>	Sue.smith	No
PASSWORD CHANGED	Date and time at which the user password was last changed in Coordinated Universal Time (UTC) <i>This field is read only and is visible only after you create the user account.</i>	2021-12-31T23:59:59.999Z	N/A

Change user attributes

When a user’s role or access needs to be changed, edit the user’s profile. Add or remove user attributes in the user’s profile as needed to reflect the user’s current role and access needs.

To change attributes for a user:

1. In the navigation pane under **Users**, select **Manage Users**.





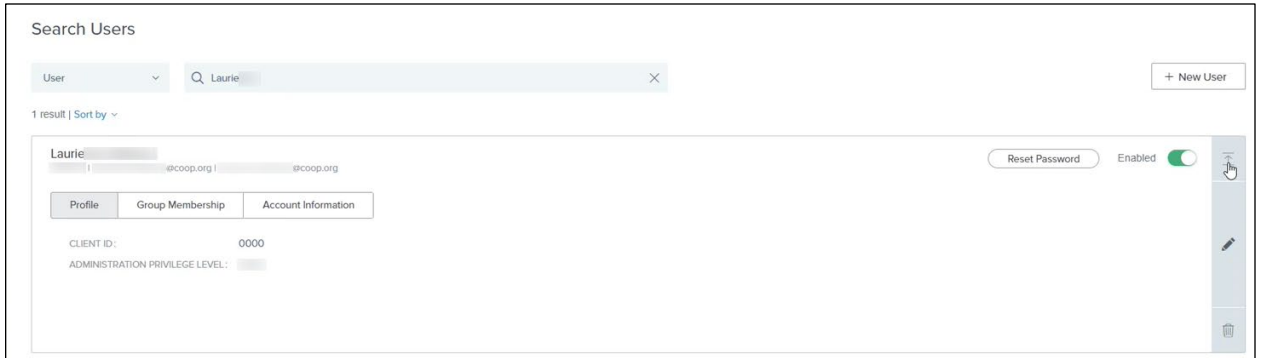
2. In the search field, enter any portion of the user’s full name and press **Enter**. Search is not case sensitive. To limit the search results, enter as much of the name as you can.



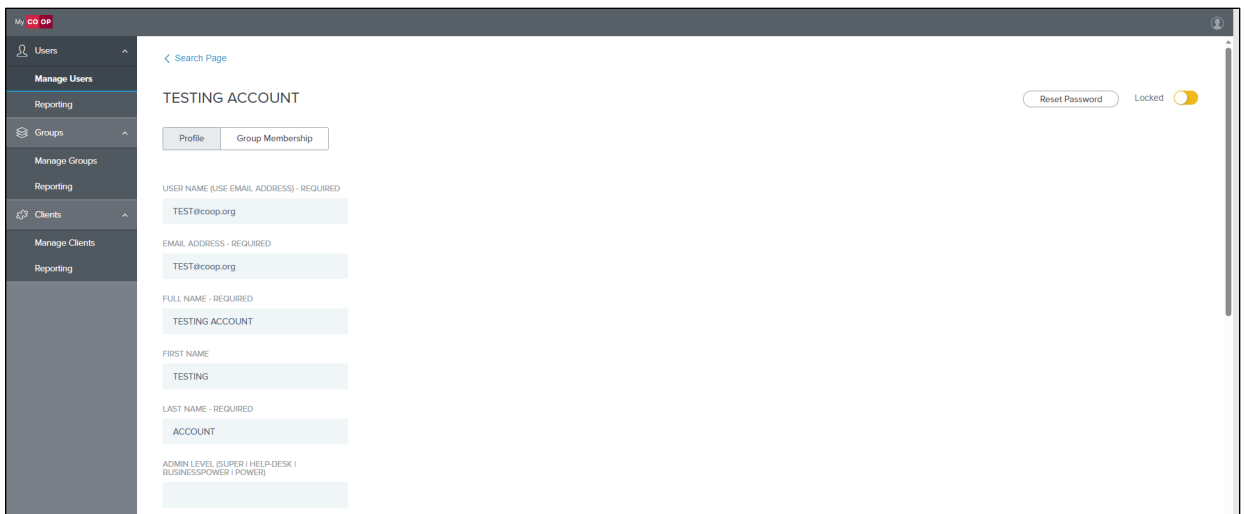
Results appear below the search field. If there are too many results, you are prompted to enter more of the user’s name to limit the search further.



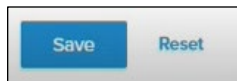
3. Click the expand icon  for the user whose attributes you want to change, and then click the edit icon .



4. Change fields as needed. For information about the fields, see *User attributes*.



5. When finished making changes for a user, click **Save** near the bottom of the screen.

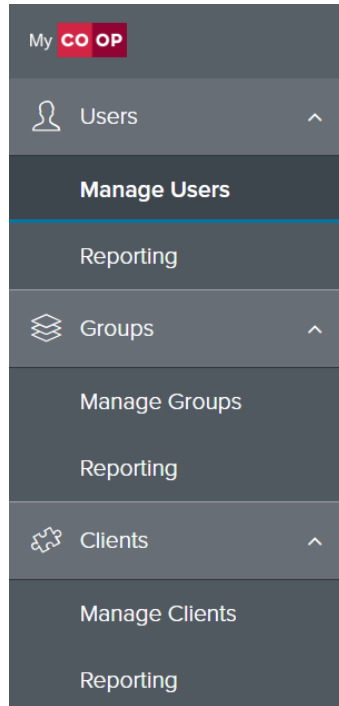


Manage group membership for users

When a user’s role or access needs to be changed, edit the user’s profile. Add or remove user application groups in Group Membership as needed to reflect the user’s current role and access needs.

To manage a user’s group membership:

1. In the navigation pane under **Users**, select **Manage Users**.



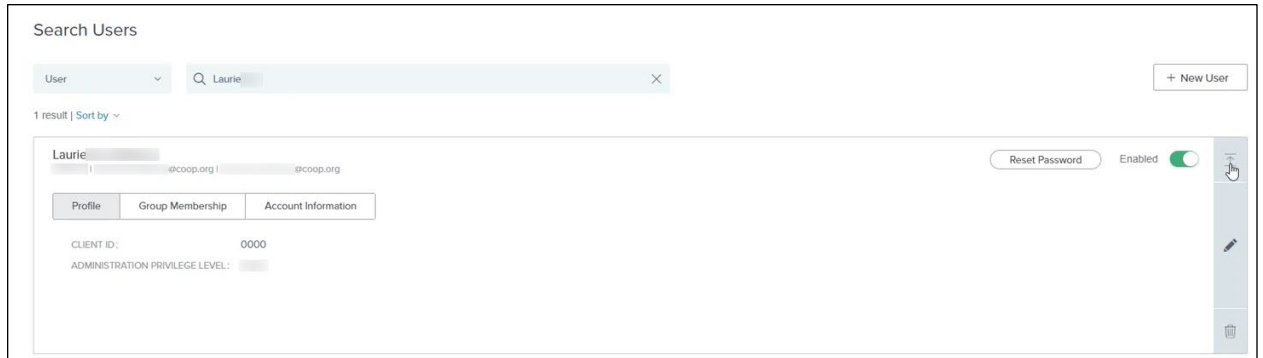
2. In the search field, enter any portion of the user’s full name and press **Enter**. The search field is not case sensitive. To limit the search results, enter as much of the name as you can.



Results appear below the search field. If there are too many results, you are prompted to enter more of the user’s name to limit the search further.

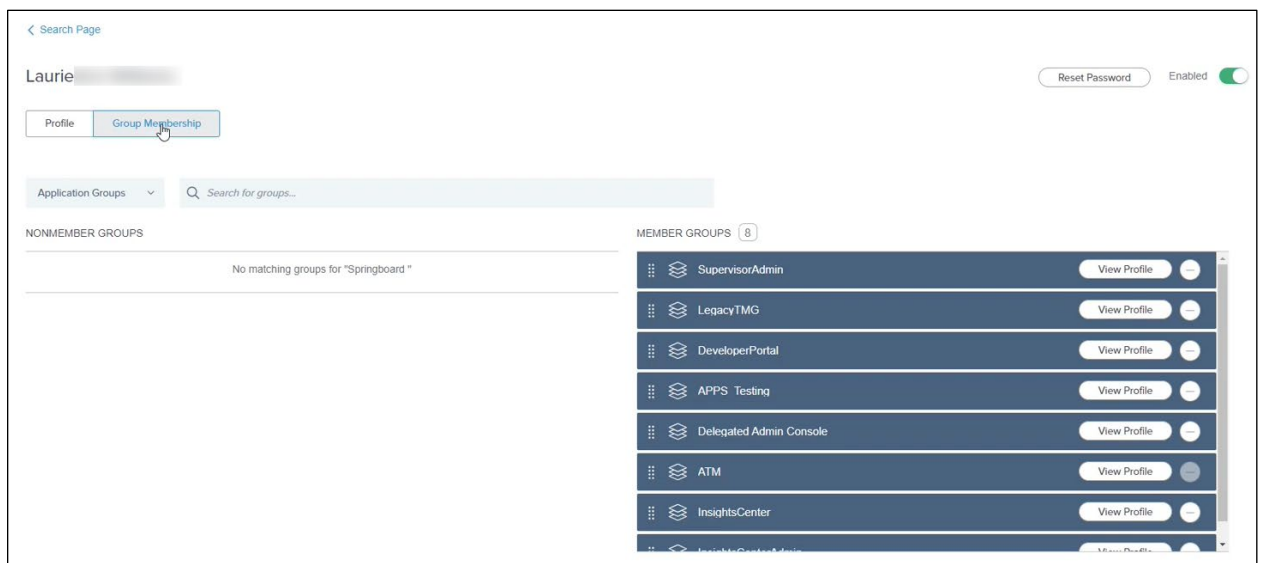


3. Click the expand icon  for the user whose group memberships you want to manage, and then click the edit icon .




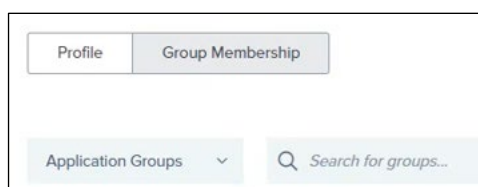
4. Click **Group Membership**.

The groups that the user belongs to are listed on the right side under Member Groups.



Change groups that a user belongs to by performing any of the following actions. The changes take effect immediately.

- **Remove the user from a group**
 - If a user should no longer have access to applications in the group, remove the user from the group. In the Member Groups list on the right side of the screen, click the remove icon  for the group.
- **Add the user to a group**
 - a. To see all application groups available for the user, put the cursor in the search field next to **Application Groups**, and press **Enter**.



Groups that are available for the user appear on the left side of the screen in the Nonmember Groups column.

Note

Not all groups listed will be applicable for all user types. For the groups applicable for your users, see the *My Co-op Application User Group Matrix and Application Glossary*.



- b. In the Nonmember Groups column, click the add icon (+) for the group you want to add the user to.
- c. To restore the view of all Member Groups, clear the text in the search field and press **Enter**.

Disable users

You may occasionally need to disable a user account. A disabled or *locked* account is not deleted.

Best practice: If a user goes on extended leave, disable the user’s account. When a user will be out of office for an extended period of time (for example, leave of absence), “disable” the user’s profile. This prevents the user from logging in and accessing Co-op tools on behalf of your financial institution while out of office. When the user returns to work, toggle the user’s profile to “enabled” to restore the user’s access.

Note

To **delete** a user account *permanently*, see *Delete users* in this guide.

A user’s account is **disabled** if either of the following occurs:

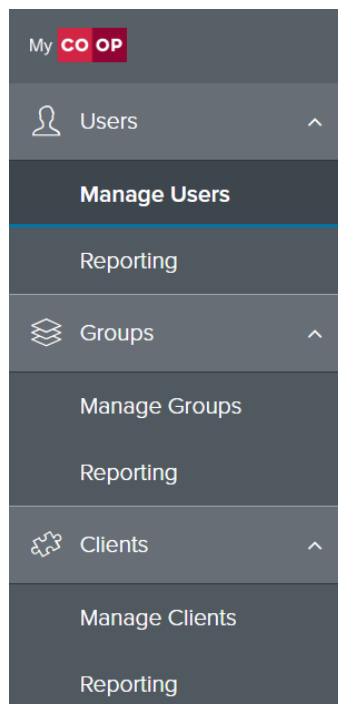
- An administrator has disabled the user’s account.
- The user has not signed on for 90 days.

A user’s account is **locked** if any of the following occurs:

- The user’s password has expired.
- Three unsuccessful attempts to sign on.

To disable a user account:

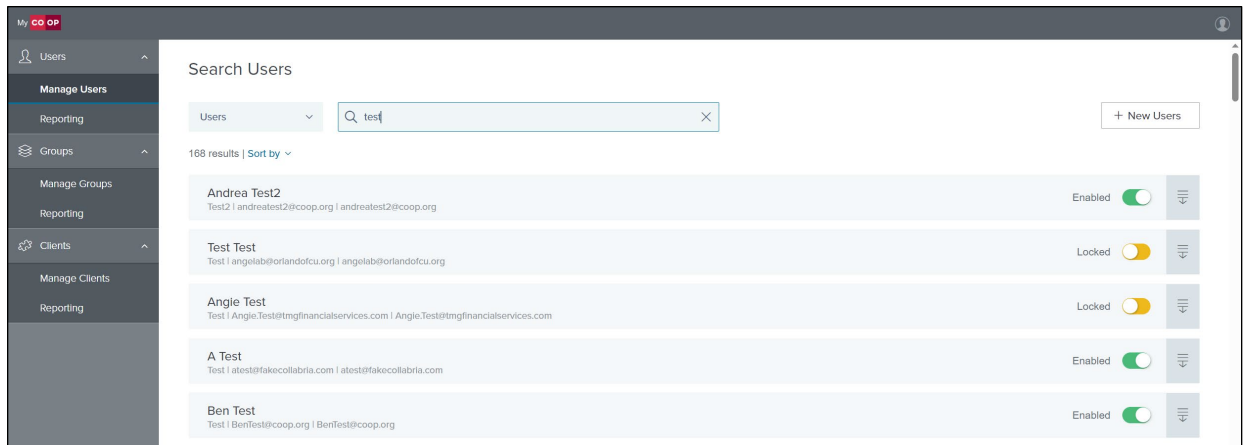
1. In the navigation pane under **Users**, select **Manage Users**.




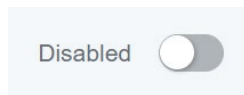
2. In the search field, enter any portion of the user’s full name and press **Enter**. Search is not case sensitive. To limit the search results, enter as much of the name as you can.



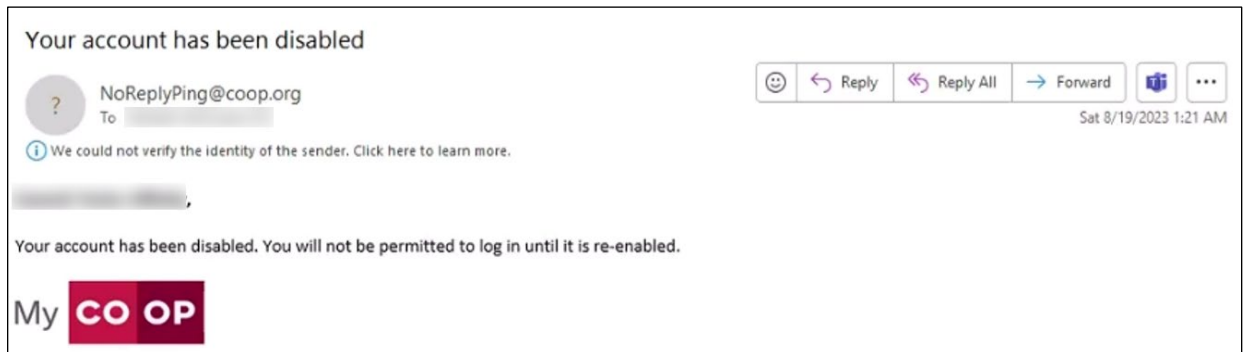
Results appear below the search field. If there are too many results, you are prompted to enter more of the user’s name to limit the search further.



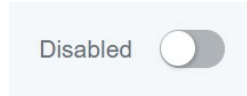
3. Click the **Enabled** icon 
The icon changes to Disabled. The status change is effective immediately.



The user receives an automated email stating that their account is disabled.

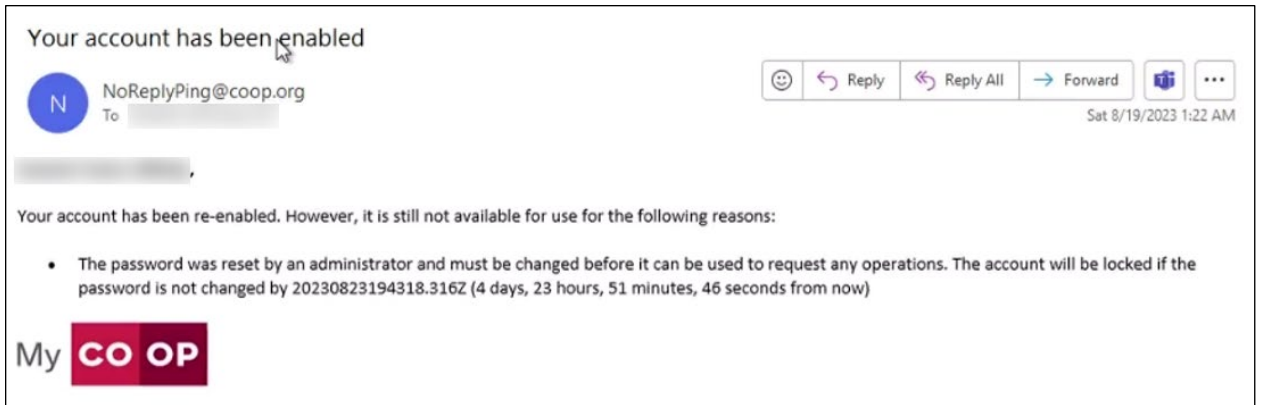


To enable the user account: Perform steps 1 and 2 in this section, and then click the Disabled icon. The status change is effective immediately.



The icon changes to the Enabled icon  and the user account is active again.

The user receives an automated email stating that their account is enabled.



Delete users

You can delete users when their accounts are no longer needed.

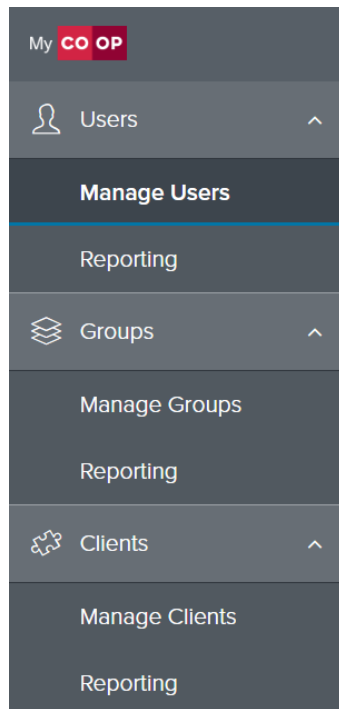
- **Best practice:** If a user is no longer employed at the financial institution, delete the user’s account.

Notes

- To disable a user account *temporarily*, see [Disable users](#) in this guide.
- User accounts with no login activity for 12 months are automatically deleted.

To delete a user:


1. In the navigation pane under **Users**, select **Manage Users**.

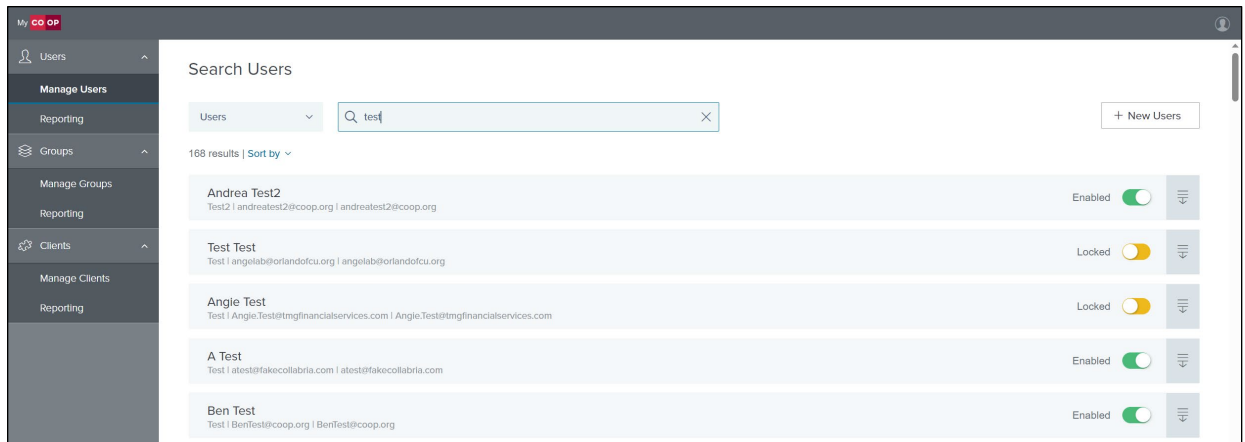


2. Use the search field to find the user account you want to delete.



Results appear below the search field. If there are too many results, you are prompted to enter more of the user’s name to limit the search further.

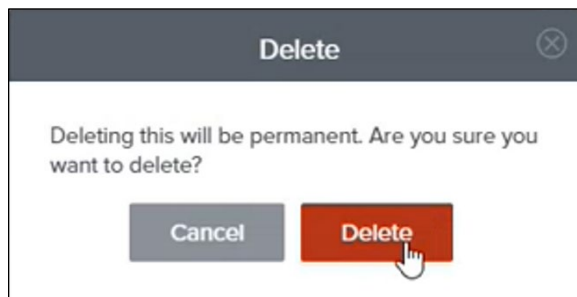
3. Click the expand icon  for the user whose account you want to delete.



4. Select the delete icon (trash can) in the lower right corner.



5. At the confirmation prompt that appears, select **Delete**. The deletion is effective immediately.



Best practice:

Co-op has an automated process that marks user accounts inactive following 90 days or more of inactivity. When an account is made inactive, the user receives an email advising that the account be reactivated if needed; if no action is taken within the subsequent 90 days, the account is deleted.

My Co-op administrators can use reporting to determine users' active/inactive status (see *Reporting* in this guide), and from that report identify user profiles that can be deleted.

Passwords

View account and password status

To view account and password status information: In the user's profile, click Account Information:

The screenshot shows the 'Account Information' page for a user named 'IC Test'. The page has a top navigation bar with 'Profile', 'Group Membership', and 'Account Information' tabs. The 'Account Information' tab is active. The page is divided into two main sections: 'ACCOUNT INFORMATION' and 'PASSWORD INFORMATION'. The 'ACCOUNT INFORMATION' section includes 'ACCOUNT STATUS' (radio button selected for 'Must change password'), 'LAST LOGIN' (radio button selected for '2020-12-01 18:00:00'), and 'LOGIN HISTORY' (radio button selected for 'No recent login history'). The 'PASSWORD INFORMATION' section includes 'PASSWORD EXPIRATION' (radio button selected for '2023-08-23 15:52:02'), 'PASSWORD CHANGED' (radio button selected for '2023-08-18 15:52:02'), and 'PASSWORD POLICY' (radio button selected for 'COOP Secure Password Policy'). A 'Reset Password' button is visible in the top right corner, and a toggle switch is set to 'Enabled'. The page also features a sidebar with a pencil icon and a trash can icon.

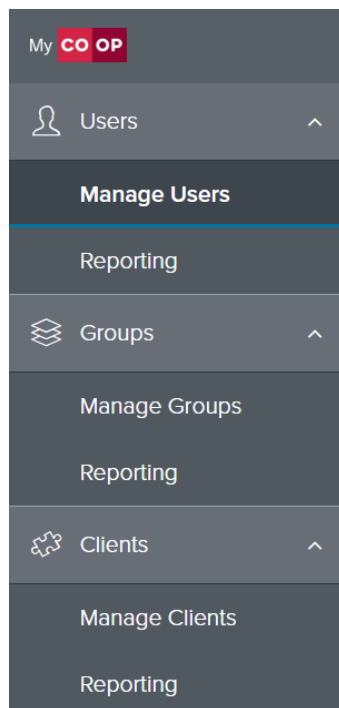
Reset a user's password

You can reset passwords for users. Some people may also refer to this as unlocking an account, although it is technically resetting a password.

Password requirements

- At least 8 characters
- At least 1 special character
- At least 1 number
- At least 1 lowercase letter
- At least 1 uppercase letter
- Password not used previously in the last year
- No more than 2 duplicate characters

1. In the navigation pane under **Users**, select **Manage Users**.



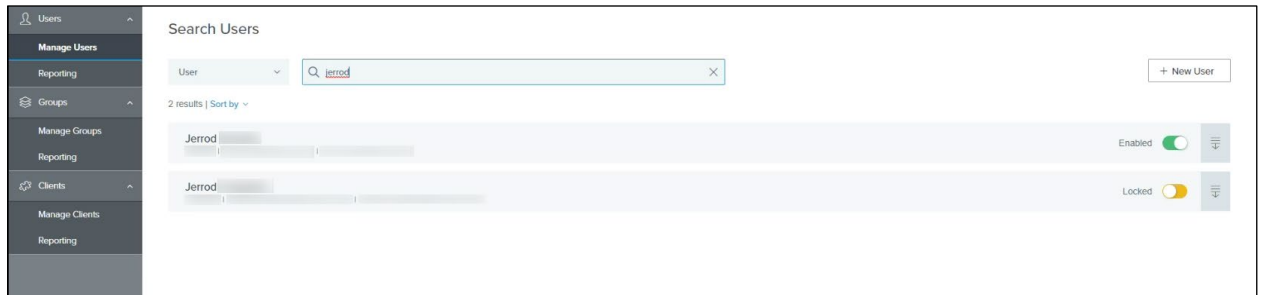
2. In the search field, enter any portion of the user's full name and press Enter. Search is not case sensitive. To limit the search results, enter as much of the name as you can.


Search Users

User ▼

🔍 Search Users by Full Name, Last Name, Email Address, User Na

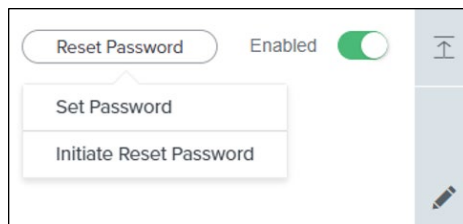
Results appear below the search field. If there are too many results, you are prompted to enter more of the user's name to limit the search further.



3. Click the expand icon  for the user.



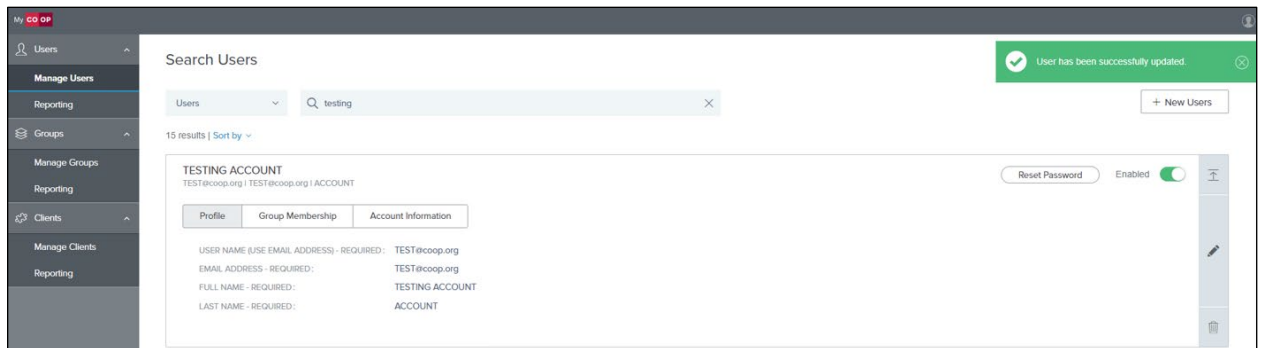
4. Click **Reset Password**.



5. Select a type of password reset:

- **To prompt the user to reset their own password at the next login:** Select **Initiate Reset Password**. This option works only if the user's account is not locked.

The user is prompted to set a new password when logging in.

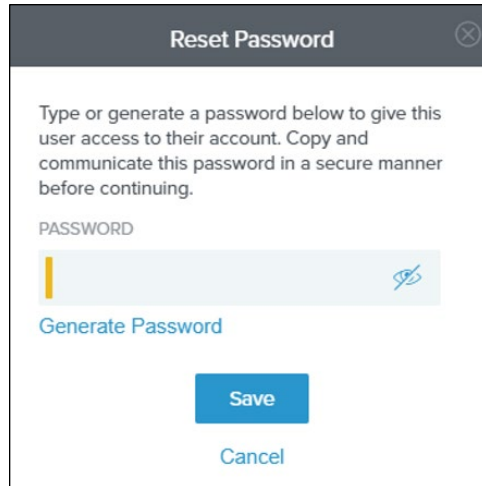


- **To generate a temporary password for the user:**

Note

Generating a temporary password will Unlock/Enable the user account.

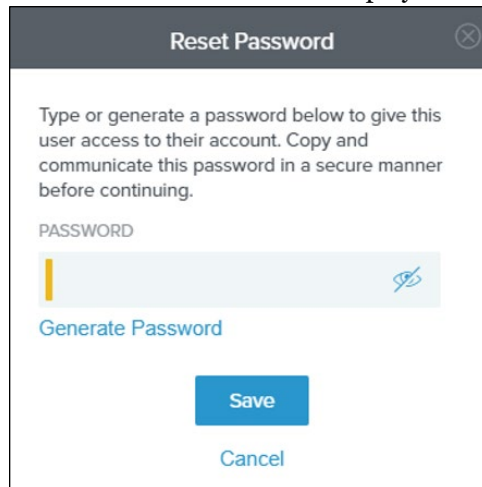
- a. Select **Set Password**. The Reset Password screen appears.



- b. Click **Generate Password**.
- c. Copy and securely provide this temporary password to the user, and then click **Save**.
The user will be prompted to change the temporary password upon logging in.

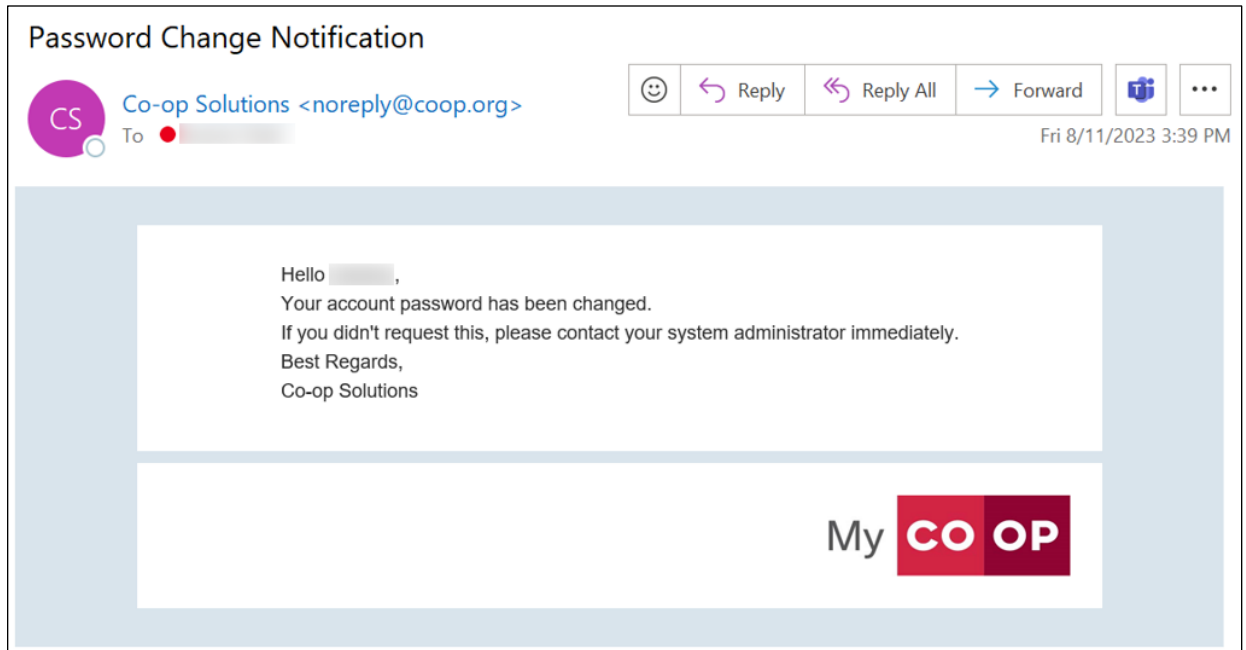
- **To *specify* a temporary password for the user:**

- a. Select **Set Password**.
The Reset Password screen displays.



- b. Type a password that conforms to the password requirements.
- c. Copy and securely provide this temporary password to the user, and then click **Save**.
The user will receive an automated email from coop.org (such as the following example) notifying them that their password has been changed, but the email will not contain the

password. The user will be prompted to change the temporary password upon logging in.



Note
Temporary passwords expire after 5 days.

Groups

About groups and assigning users

How groups work

My Co-op offers several application user groups that enable access to different sets of applications.

While each group in My Co-op contains a set of applications and is not customizable, your organization determines which users are added to which groups. You can choose to assign one user group for all staff, or tailor the user group assignments based on the functions of your staff.

Note

Applications display on the My Co-op main page based on the group(s) that the user is assigned to. Consequently, icons may appear even though a user does not have the credentials to use the application.

Applications in each group

The **My Co-op Application User Group Matrix and Application Glossary** contains a table that lists all the user groups and the applications in each group. Use the table to determine which groups to assign to which users. This table can be found in the *My Co-op Application User Group Matrix and Application Glossary*.

Methods to assign users to groups

You can assign users to groups either from the user record or the group record. Steps for each method are in this guide. The task you will perform may help determine which method would be most efficient to use.

- **Add or remove an individual user to or from groups:**

In the navigation pane under **Users**, select **Manage Users**. Find a user, and then designate or change the groups the user is assigned to. For more information on how to do this, see *Manage group membership for users* in this guide.

Tip

This is a good method when making changes for one user.

- **Add or remove multiple users to or from a group:**

In the navigation pane under **Groups**, select **Manage Groups**. Find a group, and then add or remove users in that group.

Tip

This is a quick way to add *multiple* people to the same group(s) at the same time.

Manage users in a group

As described in *About groups and assigning users*, you can manage group membership either from the user record or the group record.

From the user record

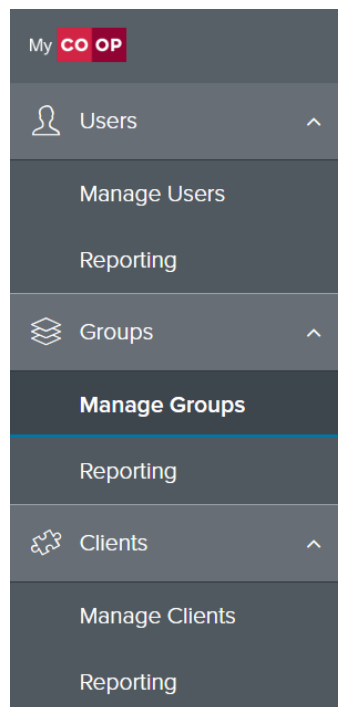
The best way to add groups to an individual user or remove groups from a user is to do so from the *user* record. For details on managing a user's groups, see *Manage group membership for users* in this guide.

From the group record

The best way to add *multiple* users to a group or remove *multiple* users from a group is to do it from the *group* record.

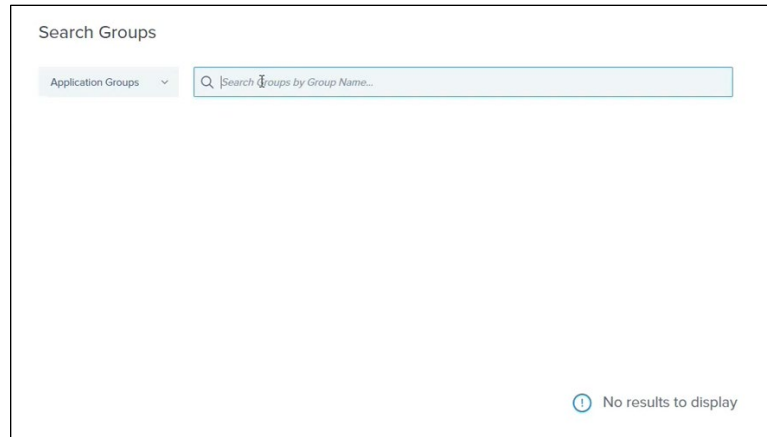
To manage a group's users, perform the following steps.

1. Find the group record:
 - a. In the navigation pane under **Groups**, select **Manage Groups** and find the group record.

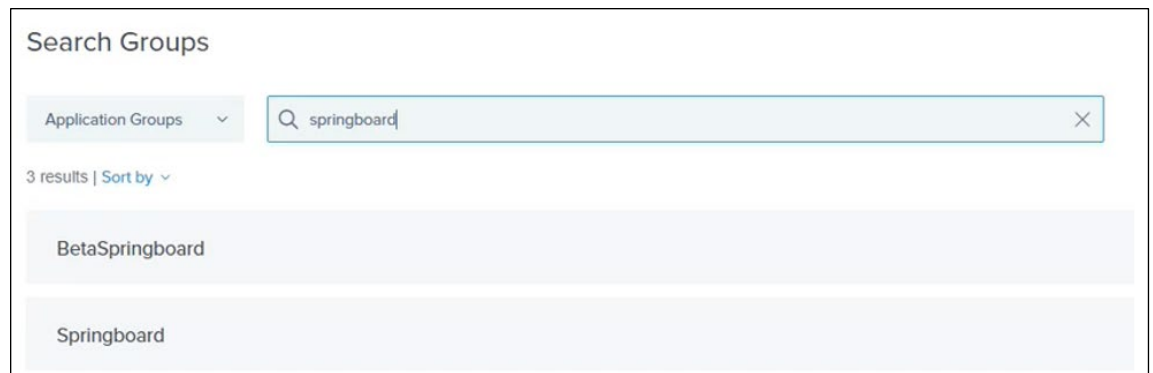



Note

When the Search Groups screen first appears, it indicates there are no results to display yet. You need to put the cursor in the search field and press Enter for all groups, or type search criteria and press Enter to find a group. For more information about finding and viewing groups, see *Search for a group*. Not all application user groups are relevant for all users. For guidance, refer to the *My Co-op Application User Group Matrix and Application Glossary*.



Example: Search results for “springboard”.

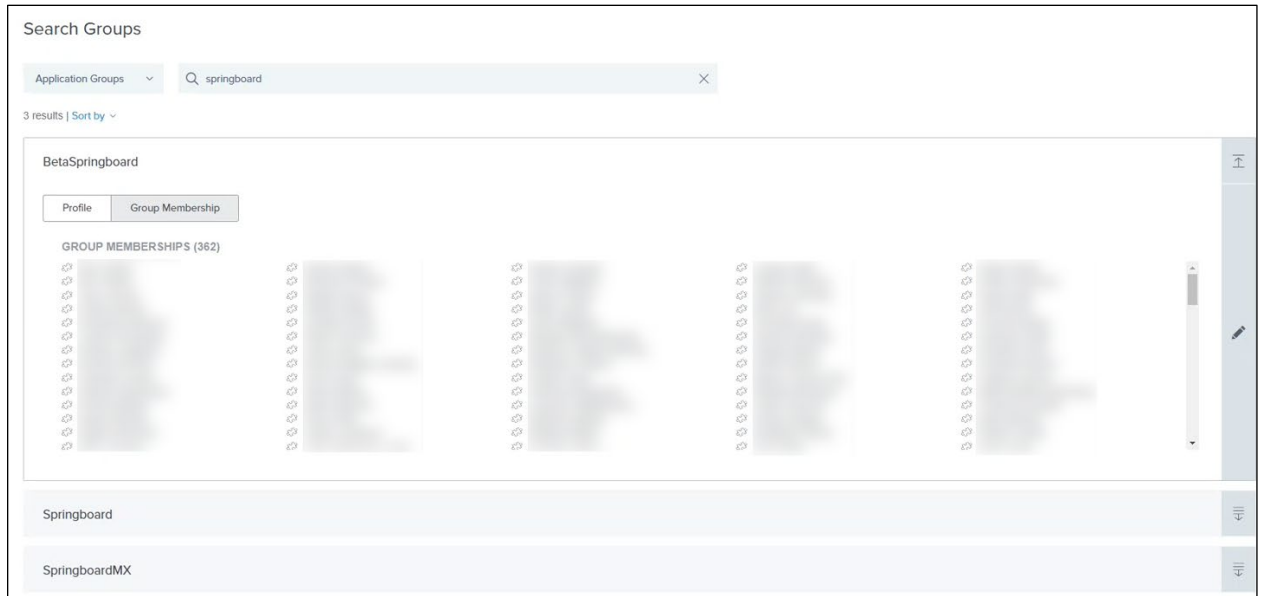



2. Click the expand icon  for the group you want to manage.
3. Select **Group Membership**.

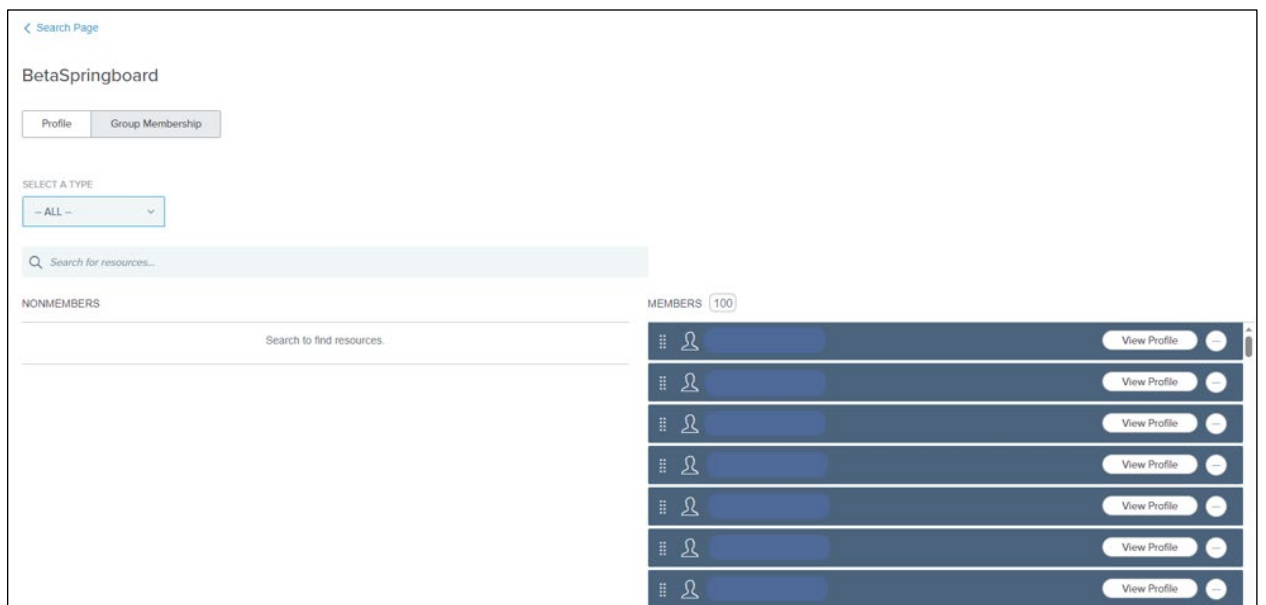
All the users who are members of the group display.


Note

The list of group members is view-only until you edit the group.



4. Click the edit icon 
5. Select Group Membership. All users in the group will display in the Members column.



6. You can change which users belong to this group:
 - To remove a member from the group:
 - Click the remove icon  for a user in the Members column.
The user is removed from the group immediately.

- To add a user to the group:
 - a. Type any portion of the user’s name in the search field, and press **Enter**.
Users matching your search criteria display in the Nonmembers column on the left side of the screen.

Example of search for “Pam m” in a group:

The screenshot shows a web interface for managing group membership. At the top, there are two tabs: 'Profile' and 'Group Membership', with 'Group Membership' selected. Below the tabs, the group name is 'BetaSpringboard'. There are two dropdown menus: 'SELECT A TYPE' with 'User' selected, and 'SELECT FROM CLIENTS' with '-- ALL --' selected. A search bar contains the text 'Pam m'. Below the search bar, the 'NONMEMBERS' section displays a list of four users, each with a profile icon, the name 'Pam M', a 'View Profile' button, and an add icon (+).

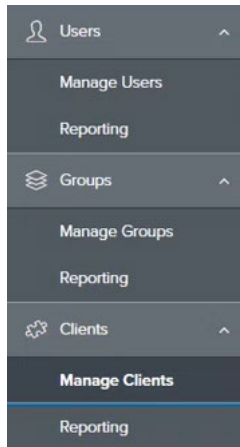
- b. Click the add icon (+) for a user to add the user to the group.
The user is added to the group immediately.
- c. To refresh the list of users in the Members column, clear the text from search field and press **Enter**.

Clients

Client information is available only to Business Power Admins.

To view client information:

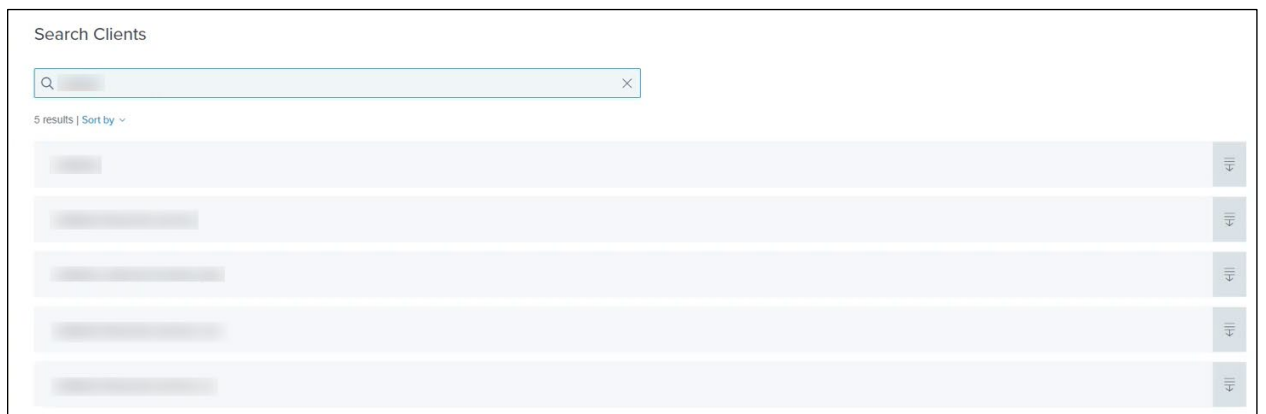
1. In the navigation pane under **Clients**, select **Manage Clients**.




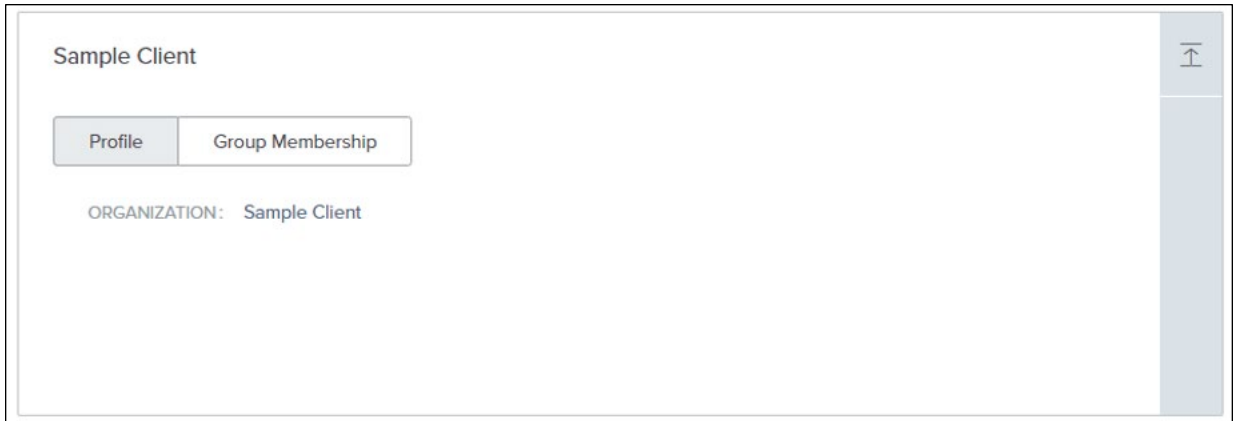
2. Type search criteria, and press **Enter**.



All clients (organizations) that the user can view appear.



3. Click the expand icon  for a client to view detailed information on the client.



4. Click **Group Membership** to view group information for the client.



Reporting

Users of the Delegated Admin Console can view reports to help them review and manage their users and groups.

The following reports are available from the Delegated Admin Console by selecting a Reporting option in the navigation pane on the left, specifying criteria, and selecting the **Run** button on the right side of the screen.

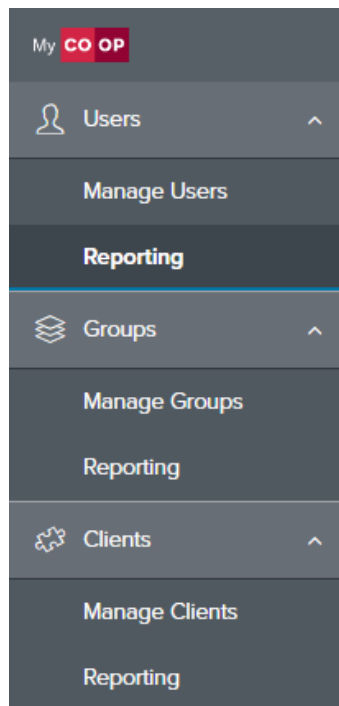
- **All Users Report:** Lists all user accounts and their properties.
- **Groups Report:** Lists all user accounts that are members of a specific group.
- **Clients Report (Business Power Admins only):** Lists all clients.

These reports contain only data that the user can view in the Delegated Admin Console. For example, when a Power Admin runs the All Users Report, the report lists only user accounts within the Power Admin's organization.

All Users Report

To view the All Users Report:

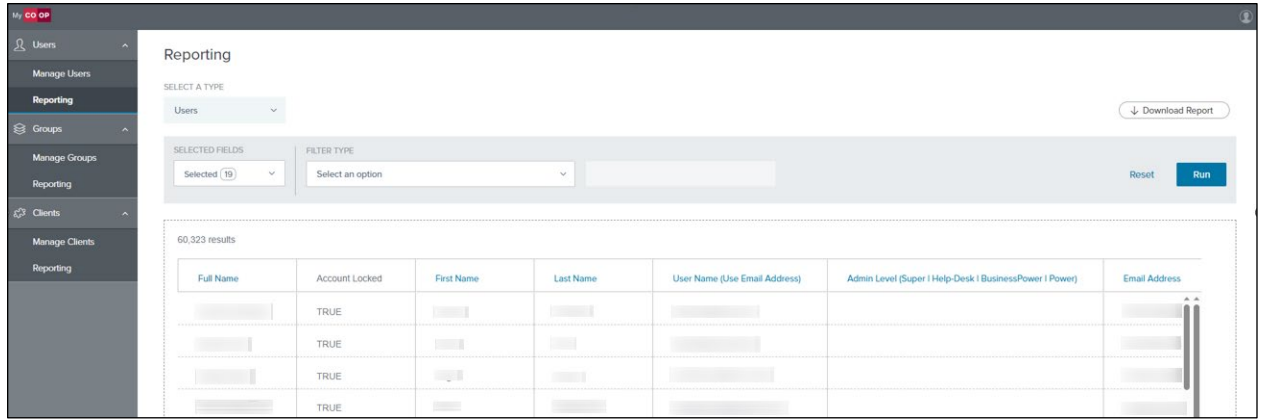
1. In the navigation pane under **Users**, select **Reporting**.



2. To specify information that displays in the report, choose options in **Selected Fields** and click **Run**.

You can also select filters in **Filter Type**.

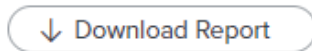
If you do not specify fields, all available fields will display in the report.



3. Select **Run**.

The All Users Report is displayed in the work area of the screen.

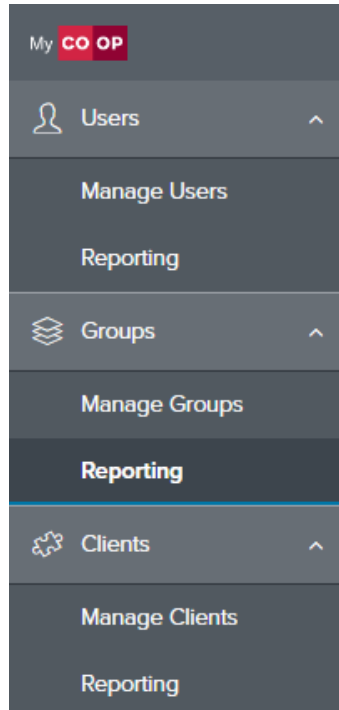
To download a .csv of the report: Click **Download Report** in the upper right of the screen.



Groups Report

To view the Groups Report:

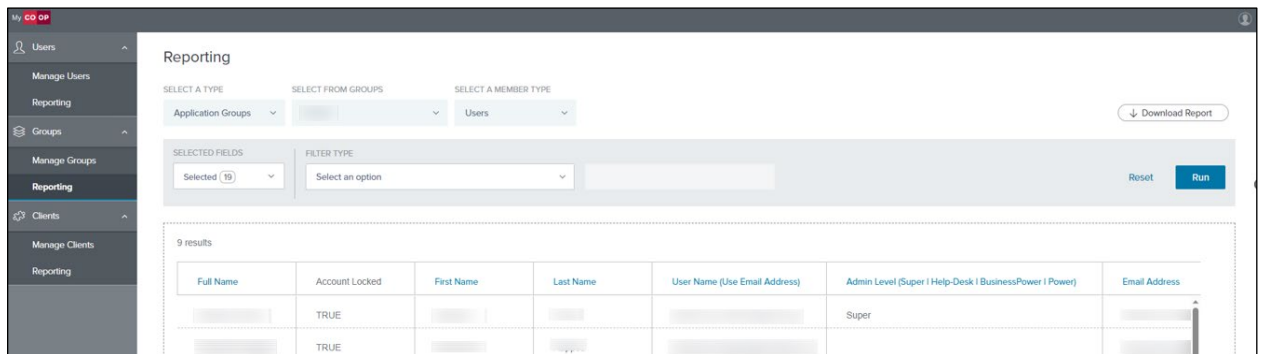
1. In the navigation pane under **Groups**, select **Reporting**.



2. To specify information that displays in the report, choose options in **Selected Fields** and click **Run**.

You can also select filters in **Filter Type**.

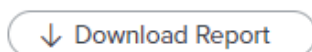
If you do not specify fields, all available fields will display in the report.



3. Select **Run**.

The Groups Report is displayed in the work area.

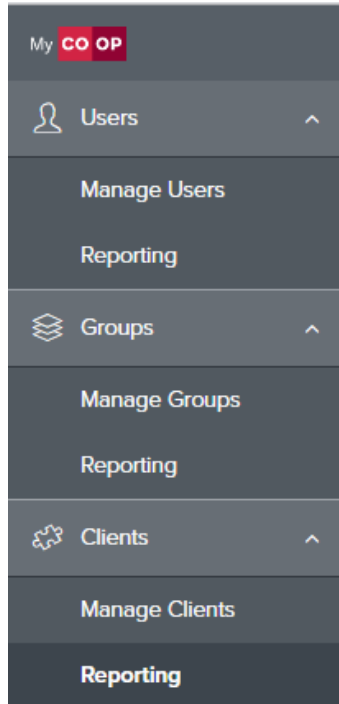
To download a .csv of the report: Click **Download Report** in the upper right of the screen.



Clients Report (available only to Business Power Admin)

To view the Clients Report:

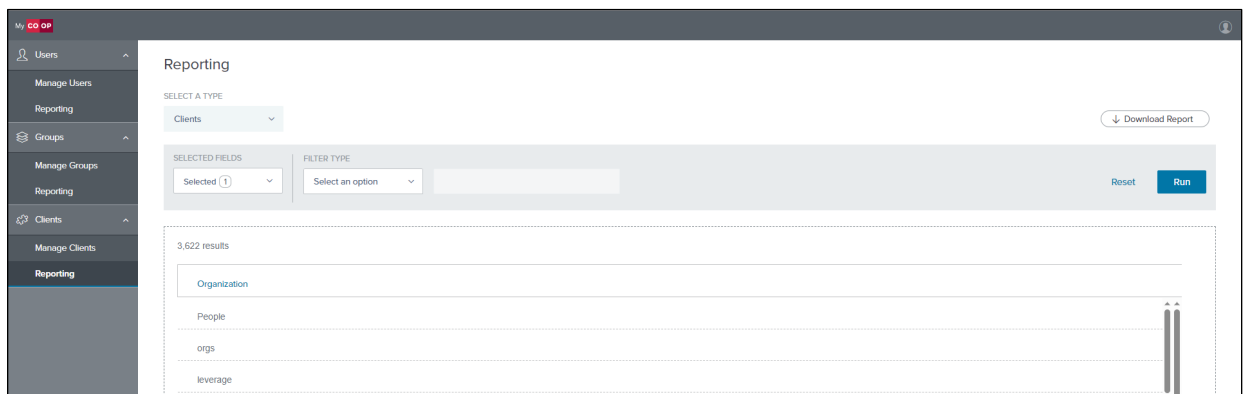
1. In the navigation pane under **Clients**, select **Reporting**.



2. To specify information that displays in the report, choose options in **Selected Fields** and click **Run**.

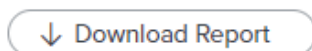
You can also select filters in **Filter Type**.

If you do not specify fields, all available fields will display in the report.



3. Select **Run**.

To download a .csv of the report: Click **Download Report** in the upper right of the screen.



Email for new users

The *sample email script* on the next page can be used as a starting point for the messages that you send to new users after they are set up with access to My Co-op.

- The sample provided is the first email that My Co-op admins (Power Admins and Business Power Admins) send to new users after setting up their access to My Co-op.
- In a separate email, provide only the password for the new user.

This sample can be tailored to fit your organization's specific needs and approach. For example, will you permit staff to receive authentication passcodes on a personal cell phone? If so, as part of the initial registration process, consider requiring users to select a backup device. Doing so can mitigate risk in cases where staff forget their phone or battery issues arise. The My Co-op End-User Guide has instructions for adding additional devices for MFA.

Sample email script:

Subject: Use only My Co-op to access your Co-op applications

Welcome to My Co-op, the secure, single sign-on (SSO) portal to streamline your access to all Co-op applications!

To ensure PCI compliance, My Co-op includes multifactor authentication (MFA), which means you will receive a one-time use authentication code each time you go to My Co-op. You can use your email address or smartphone to receive the code via *[state here what is available to users: text and/or email]*.

Before using My Co-op, follow the first-time sign-on steps in the My Co-op End-User Guide (link provided below) to set up your MFA device(s).

Here's a quick overview of what you'll need to do:

- **Access My Co-op.** Go to the following URL to log in, using your e-mail address as the username:

<https://sso.my.coop.org/mycoop>

Please note: The password will be supplied in a separate e-mail.

- **Create your password.** An essential part of the registration process is creating your own password.
- **Set up multifactor authentication (MFA).** You will be prompted to set up your device to send a one-time use authentication code for multifactor authentication when you use My Co-op.
- **After registering in My Co-op, you can sign on to My Co-op and access all the Co-op applications.**

For some applications, you will need to enter your username and password for only the *first* time you access the app. On subsequent sign-ons, the portal remembers you and auto-fills the details in the sign-in screen (also referred to as "password replay").

If you have any questions, consult the My Co-op Quick Reference Guide or My Co-op End-User Guide at <https://insights.co-opfs.org/myco-op-resources> or contact *[insert FI admin contact info]*.

Thank you!

FAQs

What are the password requirements?

See [Password requirements](#) in the *Create users* section of this guide.

How do I reset users who are locked out?

See [Reset user passwords](#).

What are groups?

Groups are sets of applications within My Co-op. Users that are members of a group will see icons for all applications within that group upon login to My Co-op. For a list and description of groups, see the *My Co-op Application User Group Matrix and Application Glossary*.

How can I see a list of all my users?

You can generate a report of all users and export the report, if desired. Follow instructions in [All Users Report](#).

How many days can a user go without logging in before they're locked out?

A user account is locked after 90 days of inactivity.

Does a My Co-op username need to be an email address?

Yes.

Do my users need to have access to Springboard to use certain My Co-op applications?

Yes, users need Springboard login credentials to access the Insights Center.

Can I use all the applications that appear on my My Co-op main page?

The My Co-op portal offers various user groups options. Each option includes a set of applications that appear on the My Co-op main page. A user sees application icons for all applications within the assigned groups, even though the user may not have credentials for each or need to use all applications that appear. Only credentialed users can access and use an application.

Does everyone at my organization have to use the same Internet browser?

Using the same browser is recommended. Some applications work better in certain browsers, which is a function of the application, not My Co-op. Your organization can use whatever browser works best to support the applications you use.

Can we use our personal smartphones to receive authentication passcodes?

You can use smartphones, tablets, and other mobile devices to receive MFA authentication codes. However, those devices are not supported for use of My Co-op itself. Your organization should decide if you will permit your staff to use personal devices. If so, you should instruct your staff to set up a backup method to allow for battery issues, etc.

How many Delegated Admins can my organization have? How about Power users? Helpdesk users?

You can have up to three Delegated Admins or Power users. There is no limit to the number of Helpdesk users.

Is there a limit to the number of users my organization can set up?

There is no limit.

How soon do changes I make in the Delegated Admin Console take effect?

Users are set up immediately when you select Save. Likewise, any changes to groups, user profiles, and user group membership also take effect immediately. If a user is active in My Co-op when a change is made to their profile, the user may need to close the browser and sign on to a new instance of My Co-op in order to see the changes reflected.

What's the time-out set for My Co-op? Does that apply to applications, too?

The timeout for My Co-op is 12 hours. Timeout will still vary for different applications; standard timeout is 15 minutes, in compliance with PCI requirements. If an application times out, close the window, and then open that application again from the My Co-op main page.

Where can I find additional resources?

Training Guides and Quick Reference Guides can be found in the Knowledge Center within My Co-op. Open the Knowledge Center icon and search for “My Co-op” for a list of all available resources.

I have more than 50 new users; is there a way to onboard all of them to My Co-op at the same time?

Mass onboarding can be performed with the assistance of Co-op. Contact your Co-op representative for more information.

Contact information

For assistance, contact Client Care at 800-782-9042, option 5 or email clientcare@coop.org.