



RSA SecurID Ready Implementation Guide

Last Modified: August 22, 2013

Partner Information

Product Information	
Partner Name	BancBridge Software Systems Inc.
Web Site	www.bancbridge.com
Product Name	TreasuryAgent (Quantum)
Version & Platform	Quantum Framework - 1.64
Product Description	The BancBridge TreasuryAgent (Quantum) is client-side software containing XML forms that automate any function currently available on your bank cash management website. It can upload/download data and reports, and initiate transactions with your website in unattended mode.



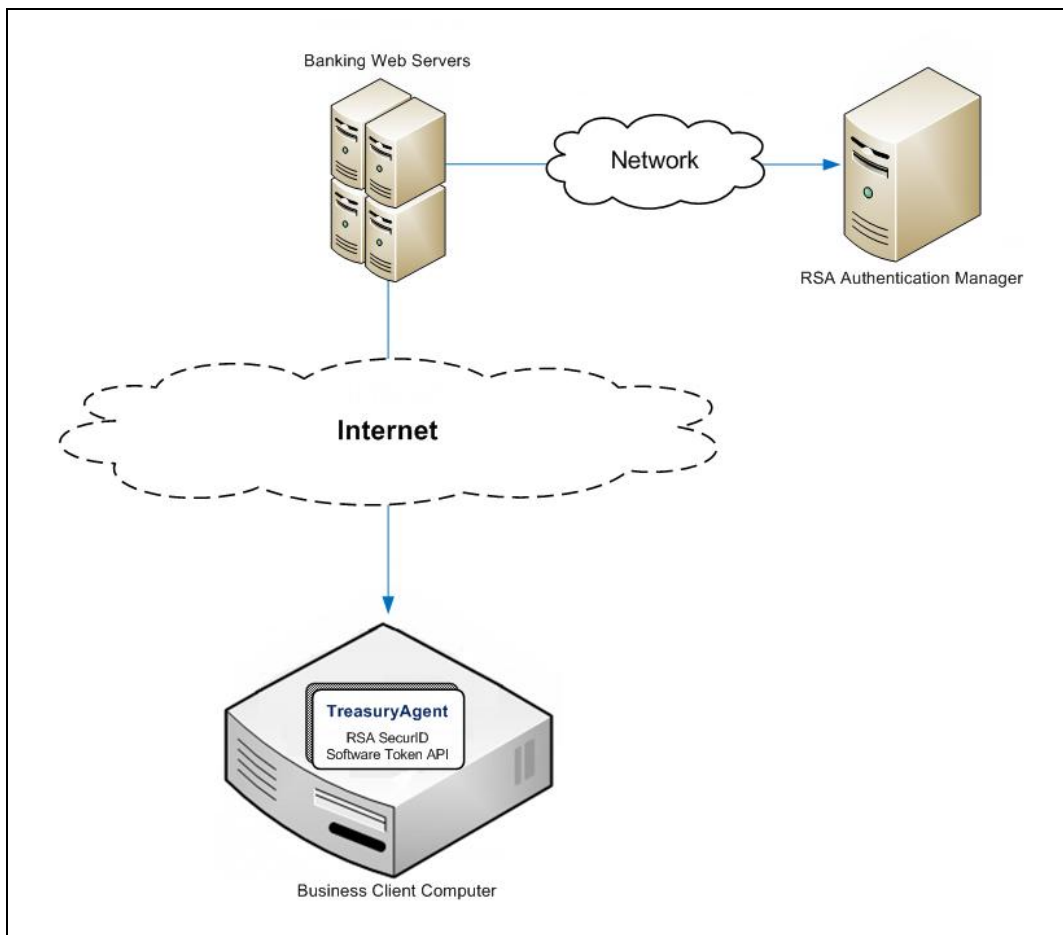
Solution Summary

BancBridge's TreasuryAgent (Quantum) is client-side software containing XML forms that automate any function currently available on your bank cash management website. With TreasuryAgent (Quantum), your business clients can use your website to:

- perform banking functions securely without human intervention
- create scheduled events
- receive notification of events, such as inbound wire or failed placement of a STOP
- receive urgent or "pushed" data from the bank, such as Positive Pay Exceptions

If your clients use RSA SecurID two-factor authentication to log in to your website, they can also configure TreasuryAgent to automatically generate RSA SecurID tokencodes and submit them to your site for authentication. This allows clients to enhance the security of their unattended transactions without sacrificing convenience.

! Important: Your website must support RSA SecurID authentication before you deploy the integration. BancBridge TreasuryAgent (Quantum) can generate and submit RSA SecurID tokencodes, but it can't authenticate them. Contact a BancBridge representative for more information.



Partner Product Configuration

Before You Begin

This section provides instructions for configuring BancBridge TreasuryAgent to generate RSA SecurID tokencodes. You should have working knowledge of the TreasuryAgent (Quantum) and RSA SecurID software tokens, as well as access to the appropriate end-user and administrative documentation. Note that this document is not intended to suggest optimum installations or configurations.

Configure the RSA SecurID Software Token

You must install the RSA Software Token with Token Automation application version 4.1.1 on each end-user's computer and import the user's software token into the application.

Configure the BancBridge TreasuryAgent

1. Install the BancBridge TreasuryAgent (Quantum), select the **Launch TreasuryAgent (Quantum)** checkbox at the end of the installation process and click the **Finish** button to launch the Program Configuration Wizard.
2. Chose a password for the admin user, enter it into the **Password** field and again in the **Confirm Password** field.
3. Chose a hint that will help you remember your password, enter into the **Password Hint** field and click the **Next** button.

Program Configuration Wizard

Program Login

Select a password for administrative user of this application on your desktop.

Please enter password

User Id: admin

Password:

Confirm Password:

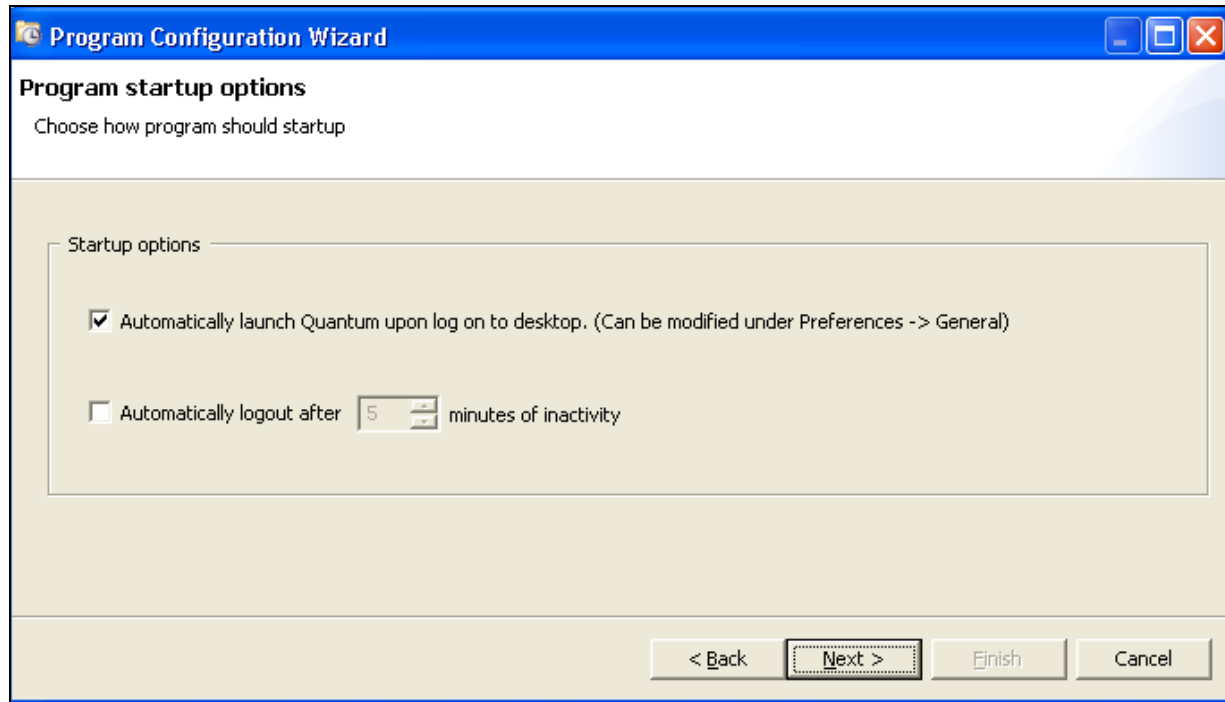
Password Hint:

Password Requirements

- Minimum of 7 characters, maximum of 10
- Requires upper and lower case
- Requires at least one numeric character
- Requires at least one special character
- Series of 3 consecutive identical characters not allowed

< Back Next > Finish Cancel

4. If you want the TreasuryAgent (Quantum) to start each time you log on to your computer, select the **Automatically launch Quantum upon log on to desktop** checkbox.
5. If you want the TreasuryAgent (Quantum) to log you out each time you have been inactive after a certain amount of time, select the **Automatically launch logout** checkbox and select the amount of minutes from the dropdown list.



6. Click the **Next** button to configure your proxy/firewall settings.
7. If you have a direct connection to the Internet, leave the default proxy/firewall settings and click the **Next** button.
8. If you want to establish a proxy connection using an automatic configuration script, select the **Use automatic configuration script** checkbox and enter the script's fully-qualified name in the text box.
9. If you want to configure your proxy settings manually:
 - a. Leave the **Use automatic configurations script** checkbox unchecked.
 - b. Enter the proxy server's hostname in the **Host** field.
 - c. Enter the proxy server's port number in the **Port** field.
 - d. Select the appropriate **Protocol** radio button.
 - e. Enter the user name, password and (optionally) name of the domain or realm for your proxy connection in the **User Name**, **Password** and **Domain/Realm** fields, respectively.

10. If you want the TreasuryAgent (Quantum) to use the same proxy settings as your browser, click the **Detect Browser Settings** button.

The screenshot shows a Windows-style dialog box titled "Program Configuration Wizard" with a subtitle "Proxy/Firewall Configuration". The main instruction is "Configure your proxy/firewall settings for internet access." The dialog is divided into three sections: "Automatic Configuration" with a checkbox for "Use automatic configuration script" and an empty text field; "Manual Configuration" with "Server" sub-section containing "Host" and "Port" text boxes, and a "Protocol" sub-section with radio buttons for "HTTP(S)", "SOCKS V4", and "SOCKS V5"; and "Authentication" with text boxes for "User Name", "Password", and "Domain/Realm (Optional)". A "Detect Browser Settings" button is located below the authentication section. At the bottom, there are checkboxes for "Validate Proxy Configuration" and a set of navigation buttons: "< Back", "Next >" (highlighted with a dashed border), "Finish", and "Cancel".

11. Click the **Next** button.

12. If you want the TreasuryAgent to send you notifications by email:
 - a. Create an account for the TreasuryAgent on your SMTP server, chose an email address for the account and enter it in field labeled **Default alert from address**.
 - b. Choose an email address where the TreasuryAgent should send notifications and enter it in field labeled **Default alert to address**.
 - c. Enter your SMTP host name and port number in the **Server Name** and **Server Port** fields respectively.
 - d. If you want your notification emails to be encrypted, select the appropriate encryption method from the **Encryption Connection Type** dropdown list.
 - e. If you need to authenticate to your SMTP server, select the **Requires Authentication** checkbox, enter your username in the **User Name** field and enter your password in the **Password** field.

The screenshot shows a window titled "Program Configuration Wizard" with a sub-header "Event Notification". Below the sub-header is the instruction "Configure your email server for event notifications." The main area contains two sections: "Default from and to email addresses for email alerts" and "SMTP Server".

The "Default from and to email addresses for email alerts" section has two text input fields: "Default alert from address:" and "Default alert to address:".


The "SMTP Server" section has several fields and options: "Server Name:" (a text input field with a dropdown arrow), "Server Port:" (a text input field), "Encrypted Connection Type:" (a dropdown menu currently set to "None"), a checkbox for "Requires Authentication", "User Name:" (a text input field), and "Password:" (a text input field).

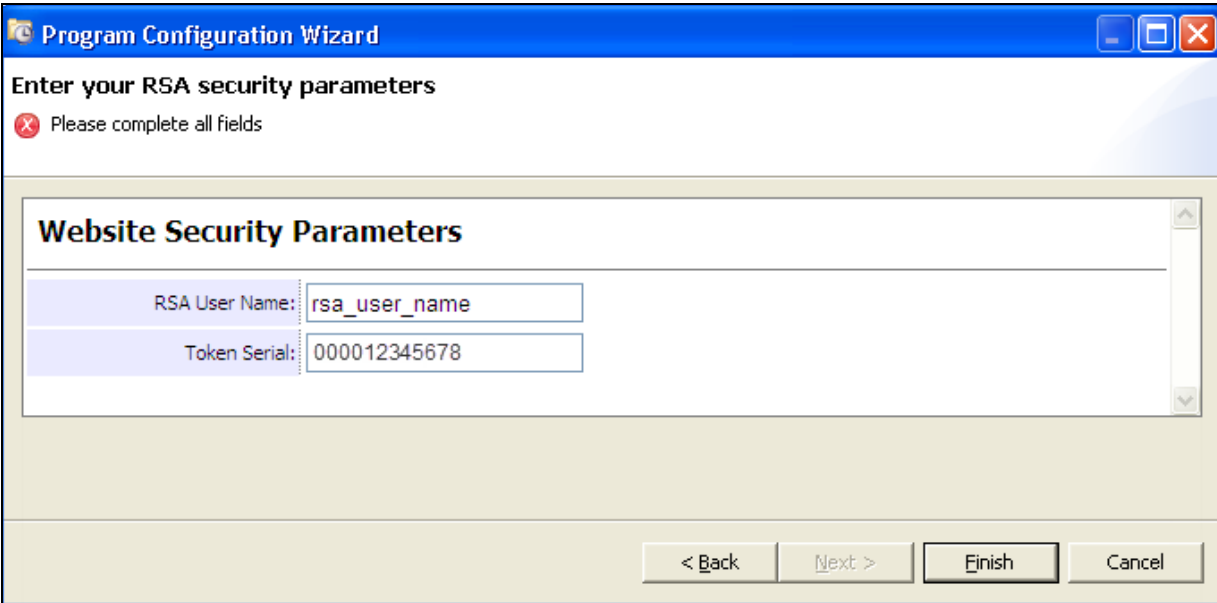
At the bottom left of the main area is a checkbox for "Test Event Notification".

At the bottom right of the window are four buttons: "< Back", "Next >" (which is highlighted with a dashed border), "Finish", and "Cancel".

13. Click the **Next** button.

14. Enter the user name for your bank website in the **RSA User Name** field and your RSA SecurID token's serial number in the **Token Serial** field.

 **Note:** The token serial number you enter must be 12 digits long. If your token's serial number is less than 12-digits, add leading zeros as necessary. For example, if the serial number is 12345678, input 000012345678.



Program Configuration Wizard

Enter your RSA security parameters

Please complete all fields


Website Security Parameters

RSA User Name: rsa_user_name

Token Serial: 000012345678

< Back Next > Finish Cancel

15. Click the **Finish** button.

 **Important:** You must now configure the TreasuryAgent to post the credentials to your web site. This is a custom procedure. Contact a BancBridge representative for more information.

Certification Checklist for RSA Authentication Manager

Date Tested: August 14, 2013

Certification Environment		
Product Name	Version Information	Operating System
RSA Software Token with Automation	4.1.1	Windows 7
TreasuryAgent	Quantum Framework 1.64	Windows 7

RSA Software Token Automation Functionality			
RSA Native Protocol		RADIUS Protocol	
PINless Token			
Next Tokencode Mode	<input checked="" type="checkbox"/>	Next Tokencode Mode	<input checked="" type="checkbox"/>
PINpad-style Token			
Deny Alphabetic PIN	<input type="checkbox"/> NA	Deny Alphabetic PIN	<input type="checkbox"/> NA
Next Tokencode Mode	<input checked="" type="checkbox"/>	Next Tokencode Mode	<input checked="" type="checkbox"/>
Fob-style Token			
16-Digit Passcode	<input checked="" type="checkbox"/>	16-Digit Passcode	<input checked="" type="checkbox"/>
Alphanumeric PIN	<input checked="" type="checkbox"/>	Alphanumeric PIN	<input checked="" type="checkbox"/>
Next Tokencode Mode	<input checked="" type="checkbox"/>	Next Tokencode Mode	<input checked="" type="checkbox"/>
Other			
System-Generated PIN	<input checked="" type="checkbox"/>	System-Generated PIN	<input checked="" type="checkbox"/>
Password-Protected Token	<input type="checkbox"/> NA	Password-Protected Token	<input type="checkbox"/> NA

RSA SecurID 800 Token Automation Functionality			
RSA Native Protocol		RADIUS Protocol	
PIN-less Mode	<input checked="" type="checkbox"/>	PINless Mode	<input checked="" type="checkbox"/>
14-Digit Passcode	<input checked="" type="checkbox"/>	14-Digit Passcode	<input checked="" type="checkbox"/>
User-Defined PIN	<input type="checkbox"/> NA	User-Defined PIN	<input type="checkbox"/> NA
System-Generated PIN	<input checked="" type="checkbox"/>	System-Generated PIN	<input checked="" type="checkbox"/>
Next Tokencode Mode	<input checked="" type="checkbox"/>	Next Tokencode Mode	<input checked="" type="checkbox"/>

JGS / PAR

✓ = Pass ✗ = Fail N/A = Not Applicable to Integration