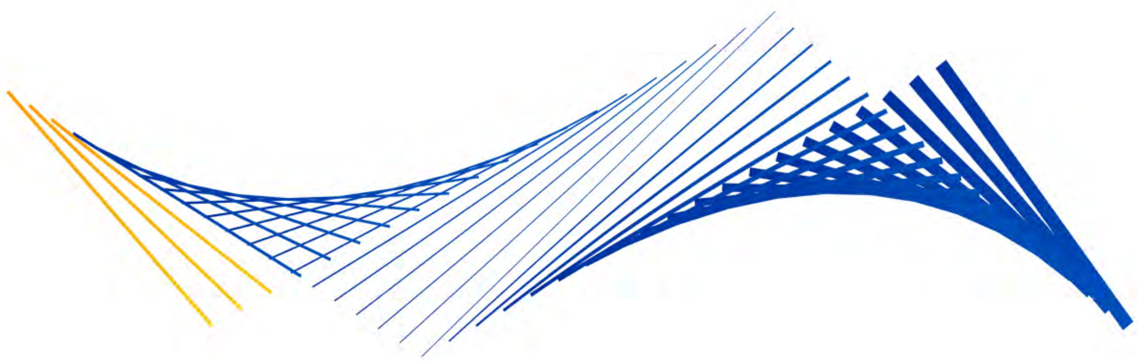
Visa Enrollment Manager (VEM) Delegated Admin

2025

Commercial Delegated Administrator's Guide



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Introduction

Visa Enrollment Manager (VEM) provides a common service for identity management and provisioning that enables secure, consistent user access to many external-facing Visa websites, content, applications, web services, and web-based file exchanges.

You can create users and establish an authoritative system of record for all Visa Extranet access using the VEM Delegated Admin tool. It allows administrators to grant user access to a wide variety of available Visa information and services.

This application gives the regions the ability to identify, manage, and entitle individuals to different user communities such as merchants, processors, vendors, law enforcement, co-brand and affinity partners, government agencies, and global and multinational corporations and clients. It is a premiere portal for business-to-business solutions.

VEM Delegated Admin also enables the creation of administrators with different administrative privileges to manage users and information, depending on their organization and responsibilities.

About This Guide

The Visa Enrollment Manager Delegated Admin features and functions shown in this document may differ from the screen elements you see when using the service. Actual page options are based on user role and level of authority. Wherever appropriate, user level variations in Visa Enrollment Manager features and functionality are indicated in this guide.

For assistance with Visa Enrollment Manager features and functionality, contact your administrator.

Starting Visa Enrollment Manager Delegated Admin

Once your ID has been identified as a Delegated Administrator for your organization, you to have access to the VEM Delegated Admin tool.

Delegated Admin Overview

The Visa Enrollment Manager offers these functions:

i. Manage Inbox
ii. Manage user profiles
iii. User Reports

Navigating VEM Delegated Admin

When navigating within Visa Enrollment Manager, you must click a link on the navigation bar, an icon, a button, or another link. Your browser's Back, Forward, and History buttons may not be supported and can cause errors. (Refer Fig. 1)

To navigate within the tool, click the menus at the top of each page (*see below image*). Your current selection appears with a small blue underline. You may also click on the VISA logo in the upper-left to return to the Delegated Admin welcome page.

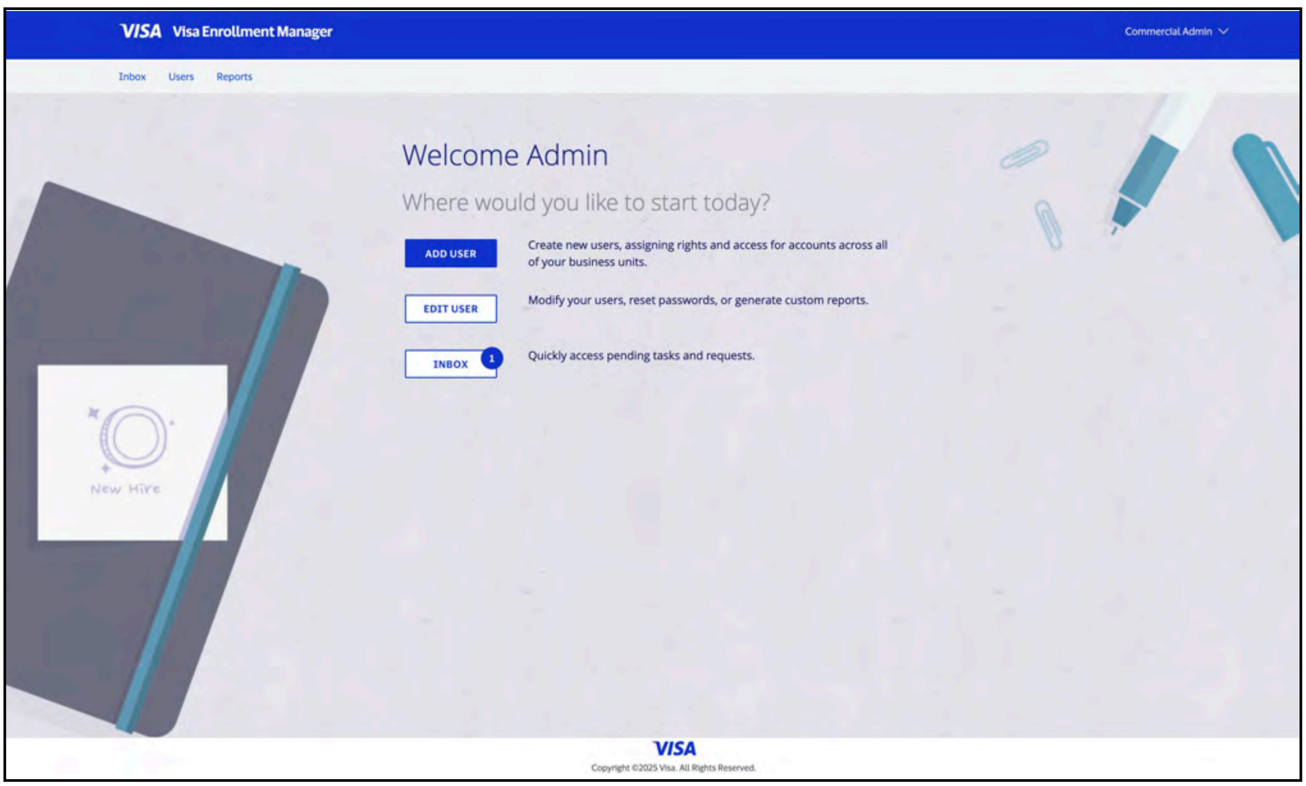


Fig. 1

Fig. 2

Many of the menus require additional administrative rights in order to be accessed but the Visa Enrollment Manager application includes the following:

The **Inbox** menu allows you to view all of your previously executed activities. This menu will also contain any uncompleted tasks for fine-grain permissions.

The **Users** menu allows you to add, modify & delete users, search for users based on specific search criteria, export user reports and add, modify & delete user privileges.

The **Reports** menu allows you to generate user reports, which can be categorized by both category and type.

Global Options

Global links are available on the upper-right side of each page as a dropdown next to your name.
Click **Home** to exit Visa Enrollment Manager.

Click **Settings** to change the number of results displayed on each page when navigating the Visa Enrollment Manager Delegated Admin application.

Click **Help** to view the help documentation for the Visa Enrollment Manager Delegated Admin application and Help Videos.

Click **Close** to log out of the Visa Enrollment Manager Delegated Admin application.

Inbox

The Visa Enrollment Manager application provides access to the activities initiated for users within a process. Click on the Inbox button at Welcome page to go to Inbox menu. Refer the image below for reference

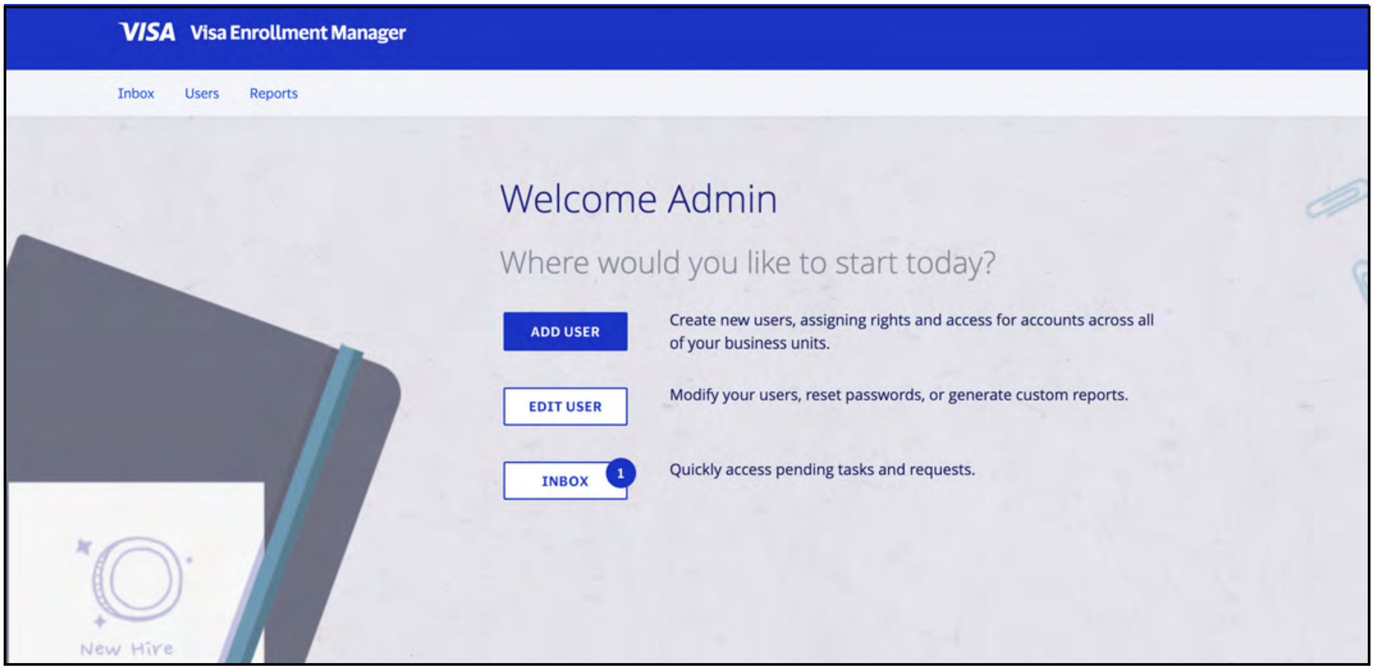


Fig. 3

The default view of the Inbox menu displays the items that require action in your Inbox. Figure 3 shows default view of Inbox menu.

1. You can customize the view of your Inbox. Click the corresponding field name to sort
2. the records in ascending or descending order.
3. Click the objects listed under each field to view the object details.
4. The following fields are displayed in your Inbox view:
    i. Type: Type of object.
    ii. Action: Action to be taken on the object.
    iii. Name: Name of the object.
    iv. Organization: Name of the user's organization.
    v. Date Submitted: Date on which the activity was submitted.

Figure 4

To go to History section, click on the History hyperlink on the default view page of Inbox. (Refer Fig. 4) You will be redirected to the history section (Fig. 6)

Fig. 5

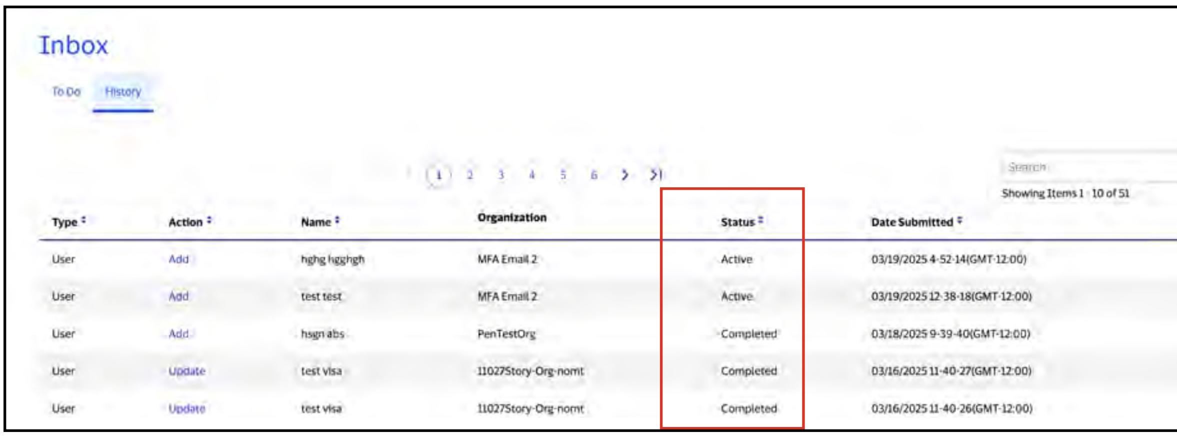


Fig. 6

You can track the status of your activities in the History area. The Status field displays the current status of the activities. (Refer Fig 6). To see detailed view of activities click on the hyperlink in the action column. Refer Fig. 7 for detailed view.

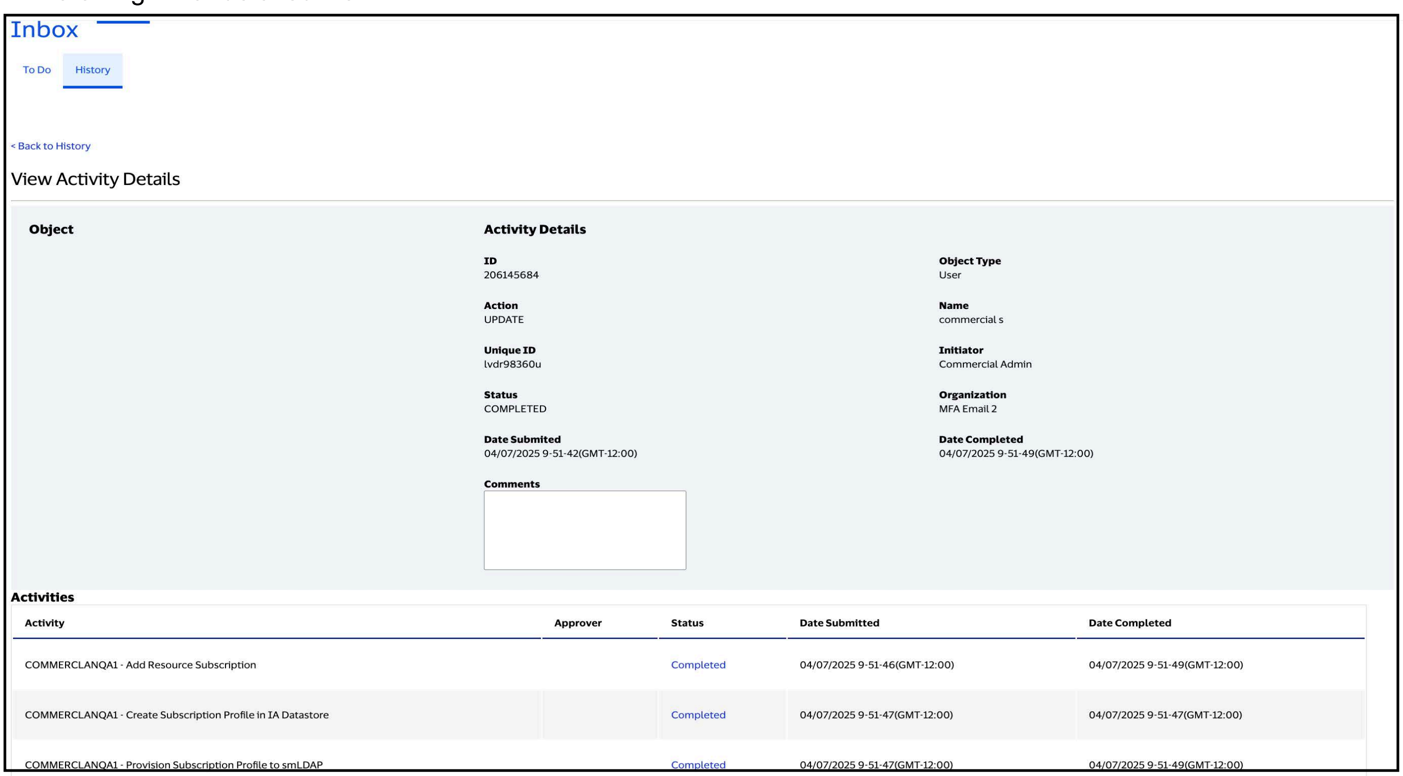


Fig. 7

Managing Inbox Queues

You can view and manage any pending items in your Inbox such as secondary entitlements and approvals for users. You can also add or delete secondary subscriptions to users from the Inbox, as required.

To complete secondary subscriptions for users

1. Click the hyperlink in Action field to **Add, Update or Delete** secondary Subscription against the specific user for whom you require to modify secondary subscription.(Refer fig. 8)
2. You will be redirected to View Activity Details page which allows you to review the activity details of a particular user (Refer Fig 9) and provide additional details if required.
3. Click the link displayed in the Name field of the Resource Details section. The Secondary Subscription page is displayed.(Refer Fig 9)
4. Enter the required information and click Finish to return to the View Activity Details page shows the View Activity Details page.
5. Click **Complete** to accept any changes and return to your Inbox.
6. Click **Failure** to mark any specific activity as a failed activity and return to your Inbox.
   NOTE: The activity link in your Inbox will now change based on the status of the activity.
7. Click **Cancel** to return to your Inbox without saving any changes.

IMPORTANT
Any subscription approvals can be found in your Inbox queue whenever a resource is subscribed to a user or added to a package

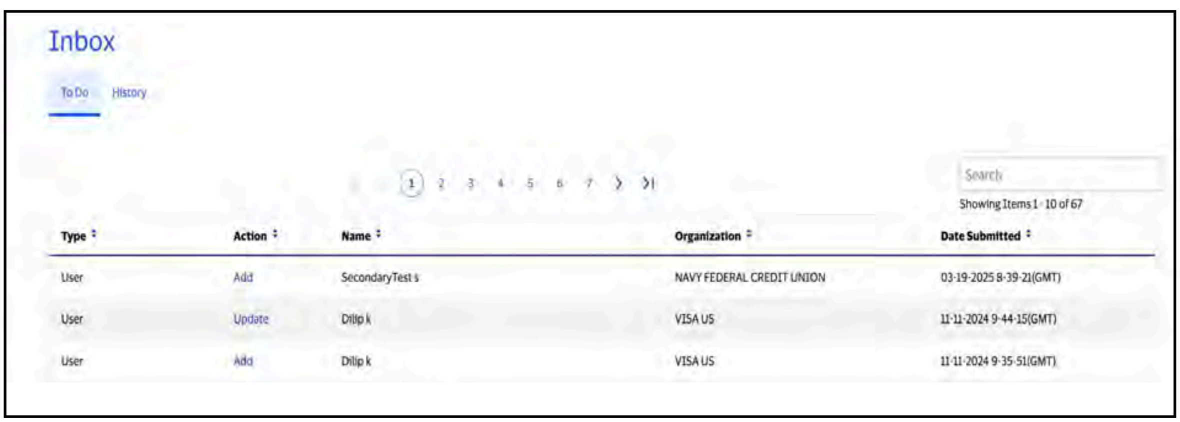


Fig. 8

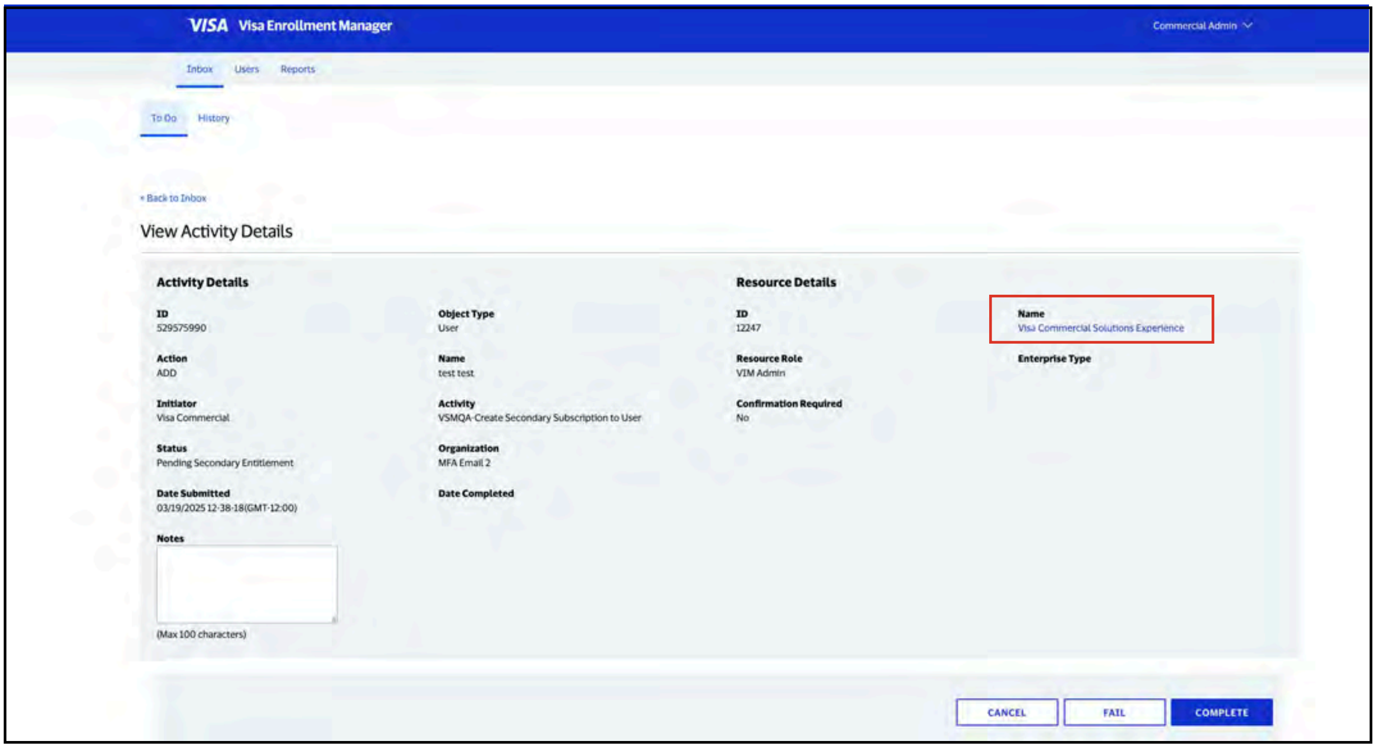

VISA Visa Enrollment Manager
Commercial Admin
Inbox
Users
Reports
To Do
History
‹ Back to Inbox
View Activity Details
Activity Details
ID
529575990
Object Type
User
Action
ADD
Name
test test
Initiator
Visa Commercial
Activity
VSMQA-Create Secondary Subscription to User
Status
Pending Secondary Entitlement
Organization
MFA Email 2
Date Submitted
03/19/2025 12-38-18(GMT-12:00)
Date Completed
Notes
(Max 100 characters)
Resource Details
ID
12247
Name
Visa Commercial Solutions Experience
Resource Role
VIM Admin
Enterprise Type
Confirmation Required
No
CANCEL
FAIL
COMPLETE

Fig. 9

Managing Users

Visa Enrollment Manager (VEM) Delegated Admin provides a consolidated system-wide view into all individual users and entitled subscriptions.

Create a New User

To create a new user, you may click the *ADD USER* button from the welcome page or *Users* menu.

Enter the user's information (see image on next page):

a) User Type:
   i. General User (default user type)
   ii. Admin User (if the user is a delegated administrator)

b) First Name

c) Last Name

d) Email address

e) Choose the user's Country/Territory (primary work location) from the dropdown menu.

f) Organization and BID fields.
   i. Click on the drop-down menu to choose the correct organization for the user, you will have more than one option if you manage multiple organizations.
   ii. The BID field will auto-populate.

g) Phone – (the Extension field number is optional)

h) Mobile Phone Country Code

i) Mobile Phone Number

j) Login ID Options
   i. For a system generated ID, click on Generate to auto populate the Login ID field.
      (1) The login ID will default to user's email address.
      (2) If the email address already exists as an ID, a warning will be presented, and a system generated ID will be populated.
   ii. If you need to manually create a Login ID for a user, choose the Manual button.
      1) Enter the desired ID. The Login ID field requires a minimum of 10 and a maximum of 50 characters.

k) User Password Options
   i. "Generate" – This option will generate a random password for the user. Administrators can view the system-generated password on the confirmation page, and it will also be displayed in a pop-up when user creation is successful. Administrators will need to share it directly with the user.
   ii. "Manual" – Administrators can view the system-generated temporary password. It will not be sent via email. Administrators will need to share it directly with the user.

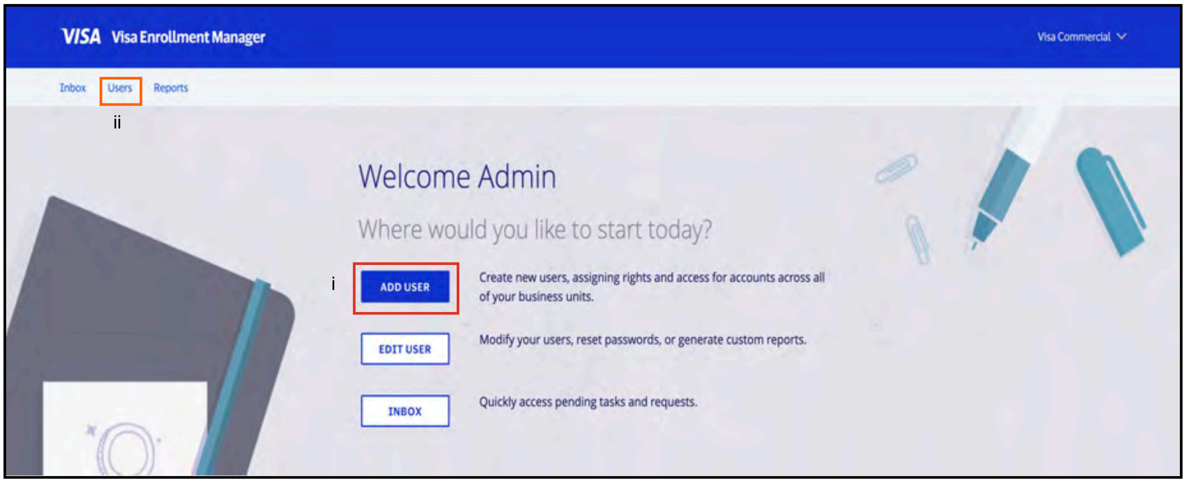
Upon first login with the startup password, the user will be asked to change the password. The new password must conform to the following rules:

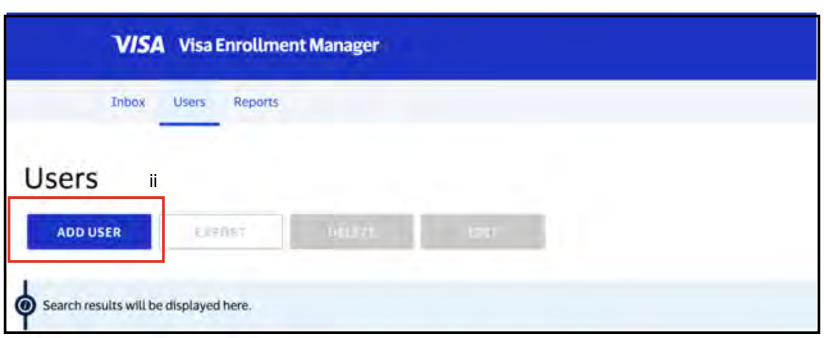
1. Cannot use a password used within the last 12 months.
2. Must be at least 12 characters long.
3. Must contain at least 1 lowercase letter.
4. Must contain at least 1 uppercase letter.
5. Must contain at least 1 number.
6. Must contain at least 1 of these special characters ! @ # $ % ^ & * . _
7. Must be less than 65 characters.
8. Must not match or contain user name.

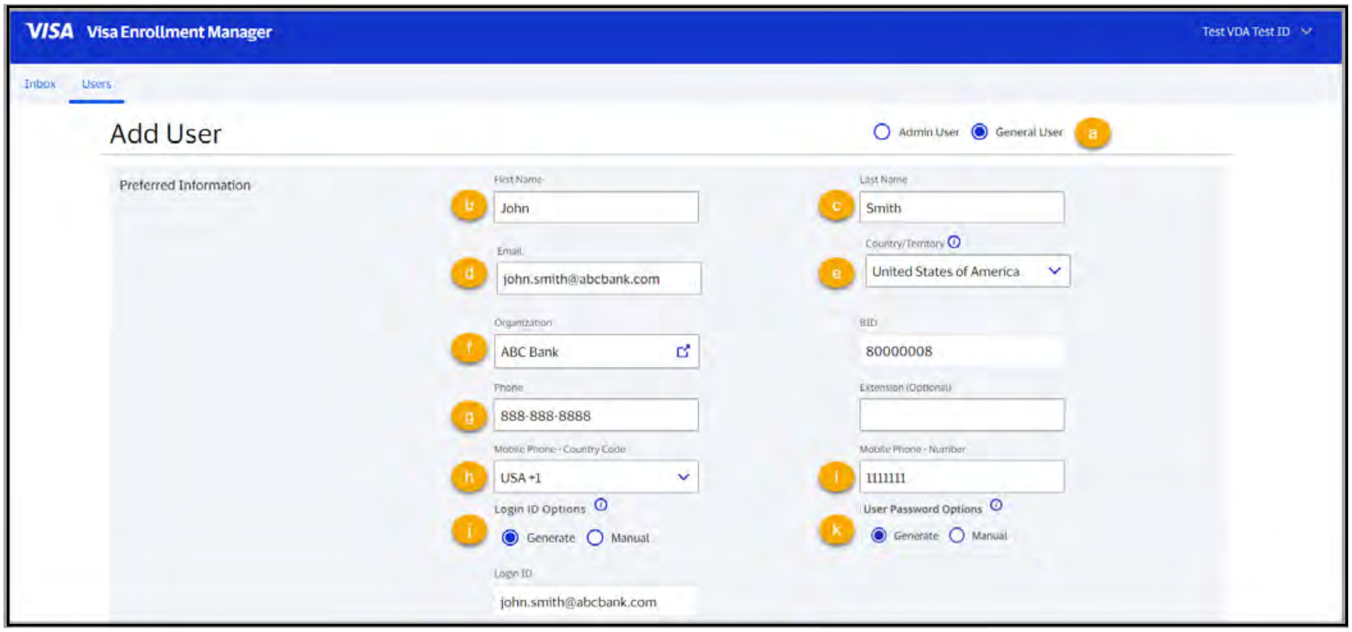
Create New User

To create a new user, you can select the

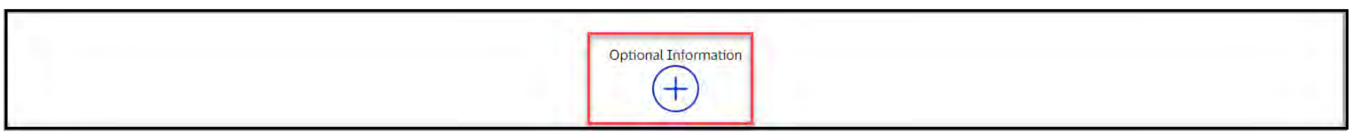
i. *ADD USER* from the Welcome Page
ii. *Users* menu from navbar.



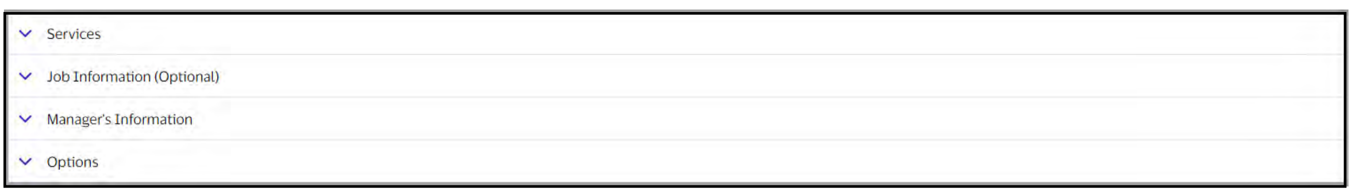




At the bottom of the page, click on Optional Information to add Services, Job Information, Manager's Information, and Options.

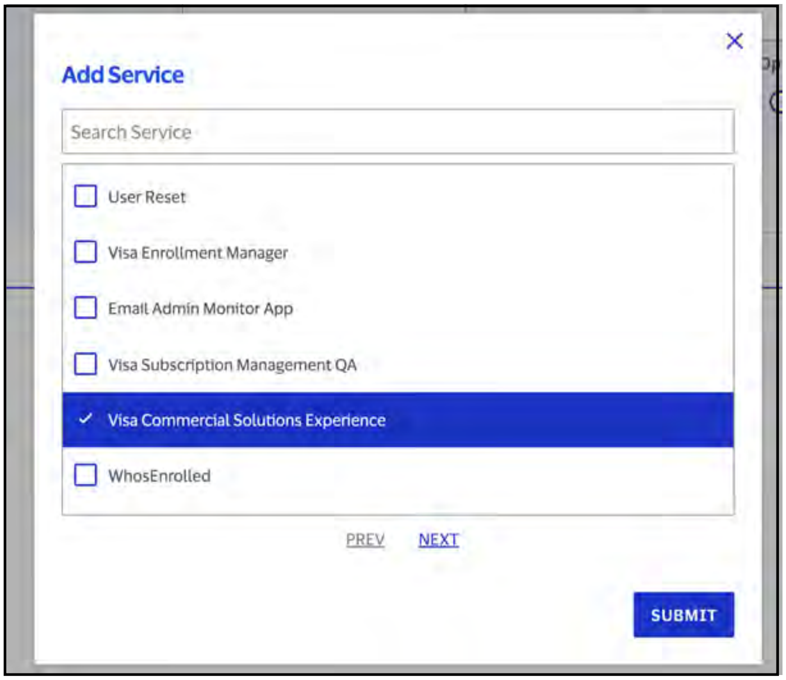


Click the section to expand each of the title for more selection.



Adding Services

1. In the ADD USER tab scroll to the bottom of the page, click on Optional Information button to see add Services option.
2. Click on **Services**.
3. Click on **ADD SERVICE** and the menu is displayed showing all the services that can be added to the user.
4. Select the service(s) necessary to be assigned to the user and click **SUBMIT**.
5. Select the Role you want to assign to the user

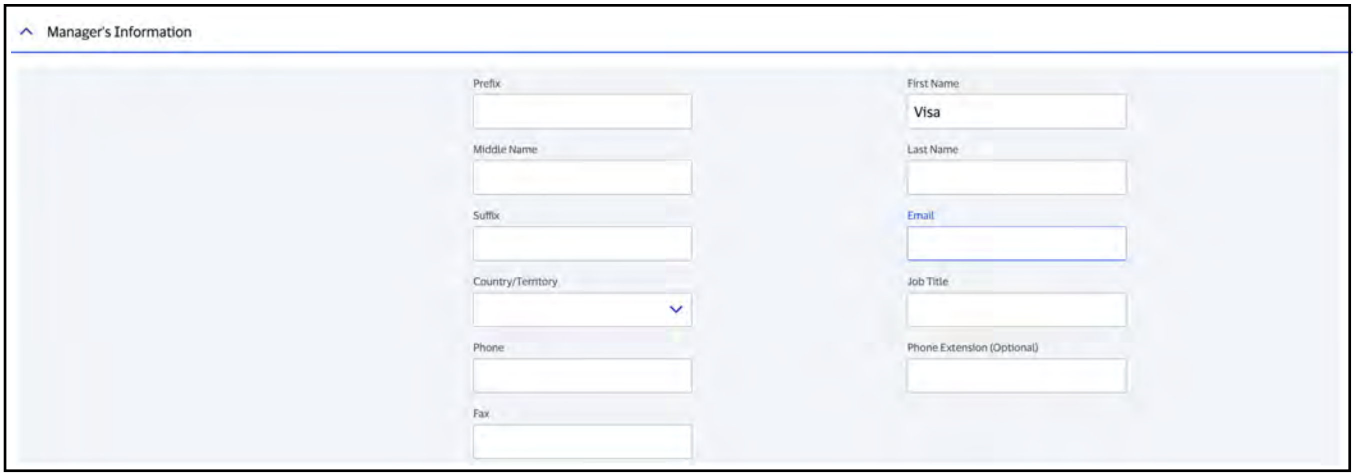


Adding Work Information (*these fields are not mandatory*)

1. In the ADD USER tab scroll to the bottom of the page, click on Optional Information button to see Job Information option.
2. Click on Job Information.
3. Complete the relevant user's information.

Adding Manager's Information (*these fields are not mandatory*)

1. In the ADD USER tab scroll to the bottom of the page, click on Optional Information button to see Manager's Information option.
2. Click on Manager's Information.
3. Enter the user's Manager's Information

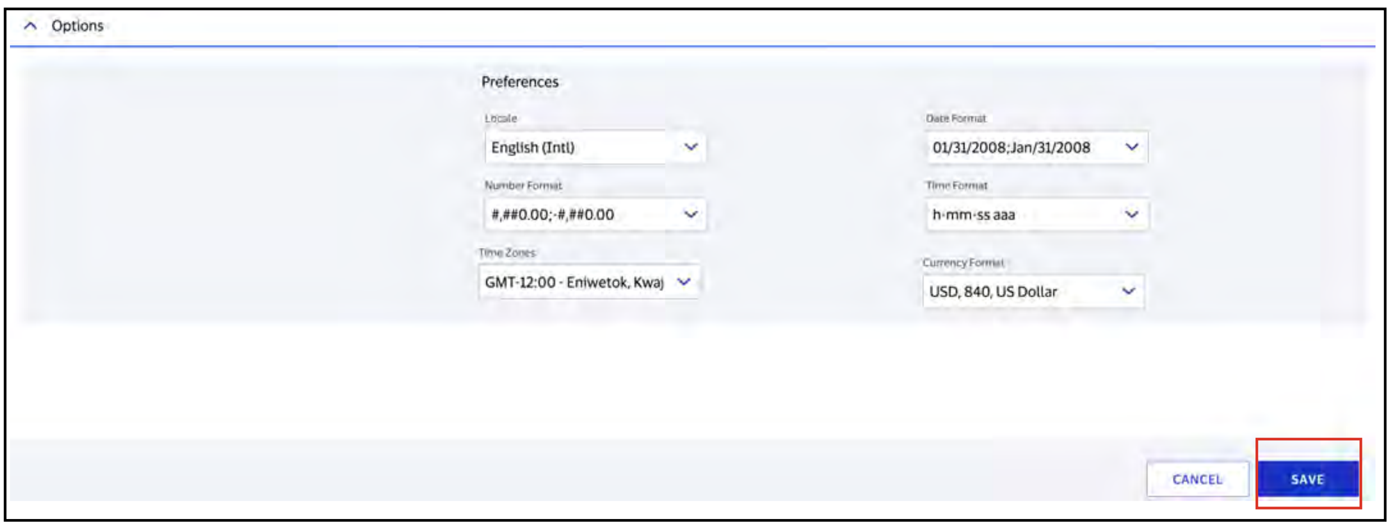


Adding Options

The Options page allows you to set the User preferences for Locale, Date Format, Number Format, Time Format, and Time Zone can be modified to change how the Administrator sees information.

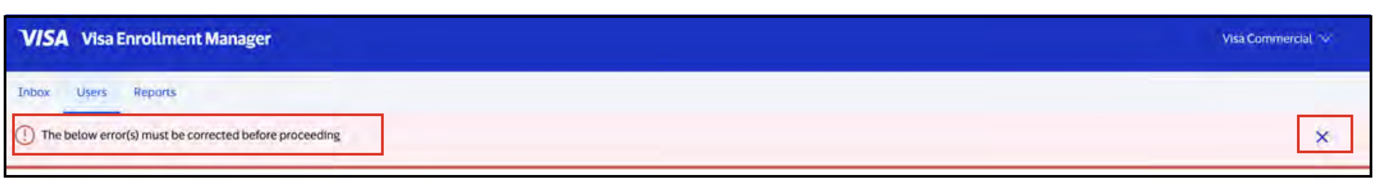
NOTE: Any changes made to these options take effect only when users log off and log in.

Click **SAVE** to continue to the confirmation page.



If the system detects that the required details are missing or any value violates the constraints, a red pop-up bar will be presented on the confirmation page.

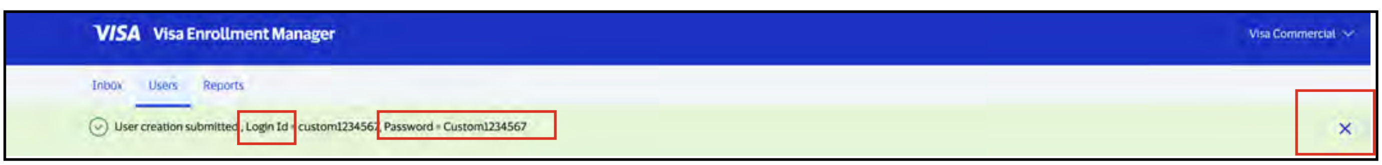
1) Click on **X** on the right side of the bar to dismiss the message.
2) Click on **EDIT** at the bottom of the confirmation page to enter the correct details.



On the confirmation page, review the information and if necessary enter notes in the **Comments** area.

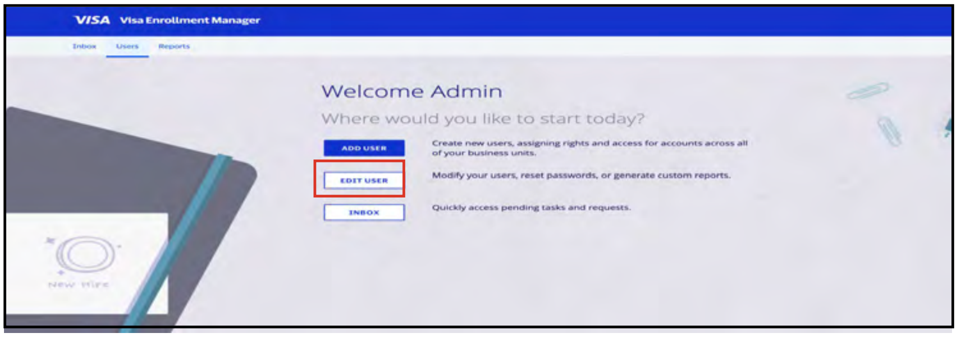
a. If everything is correct, click on **FINISH.**
b. If changes are needed, click on **EDIT** to make the necessary corrections, and then be sure to click on **FINISH.**
c. If you need to cancel the entire process and not save the information click on **CANCEL**

On the Users page, a green bar will be presented confirming that the new user has been created. Click on **X** to remove the green bar.

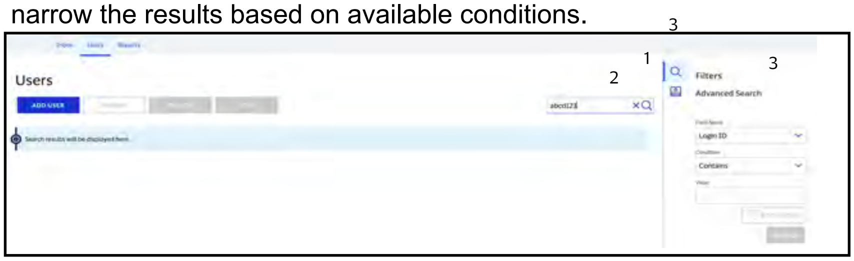


Find and Edit an Existing User

To find a user, you may click the **EDIT USER** from the Welcome Page or the Login ID link for that user in the *Users* menu.

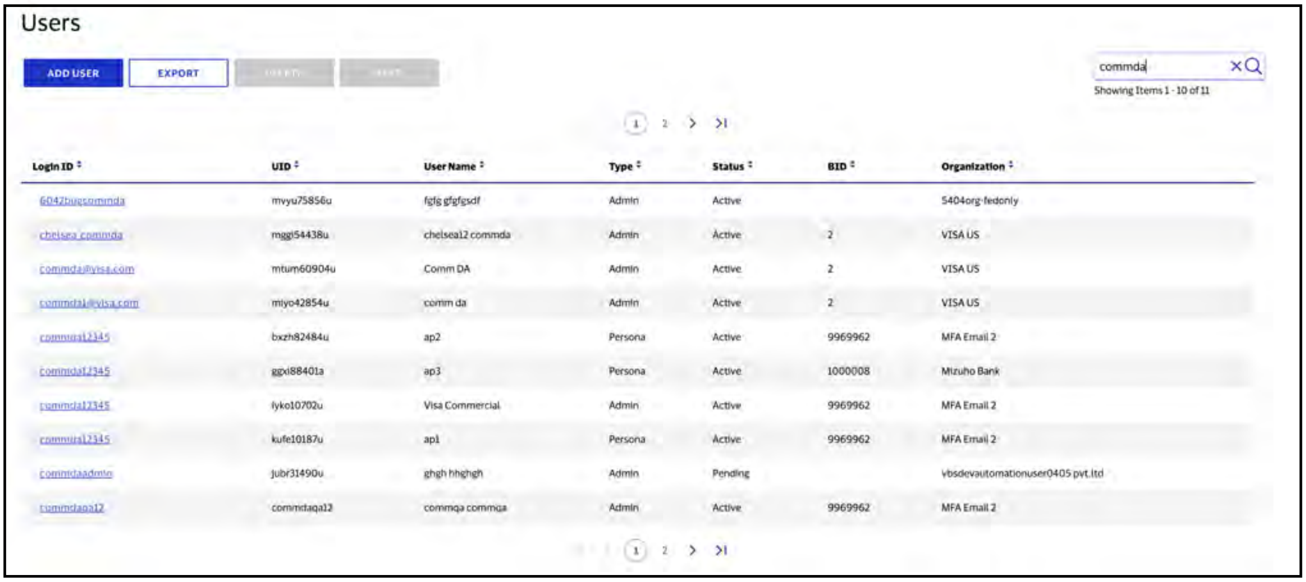


1. Enter the user's Login ID in the Search bar and then click on the "Magnifying Glass" icon to initiate the search.
2. Click on the "X" icon to clear your search input.
   NOTE: You can search using partial IDs as well.
3. Use the Filters Advance Search feature, if you don't have the Login ID available or need to narrow the results based on available conditions.

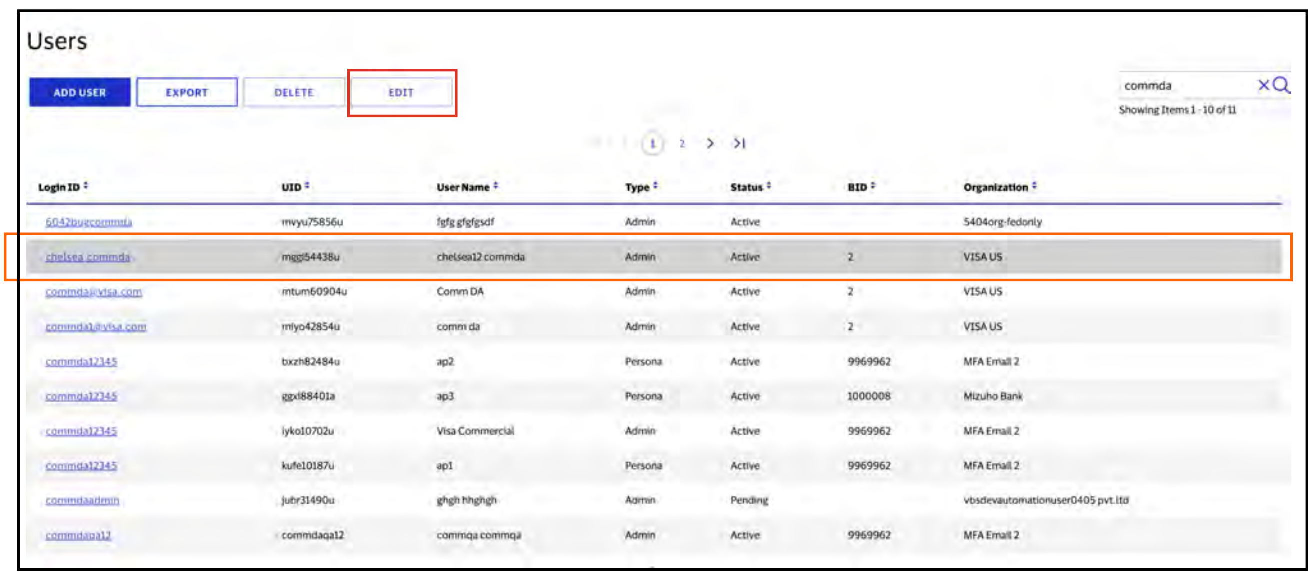


i. Choose the Field Name to use as a filter
ii. Select a Condition for the Field Name you selected.
iii. Enter the Value used for the filter.
iv. Click on ADD FILTER (repeat the process if you like to add more filters).
v. Click on SEARCH to see the results.

2

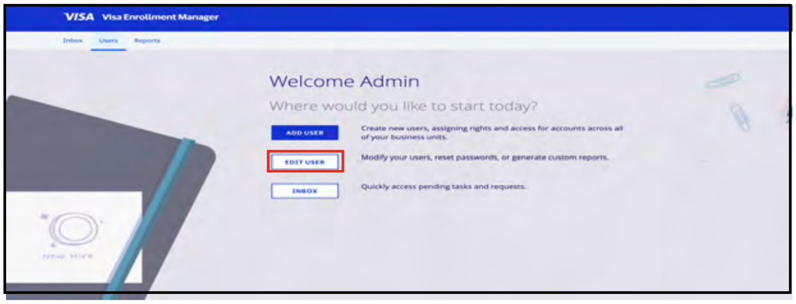


6. To view the details of any user -
   i. Click on user's login id Hyperlink
   ii. Select the user row and click on **EDIT** .



Edit User

To edit a user, you may click the EDIT USER button from the welcome page

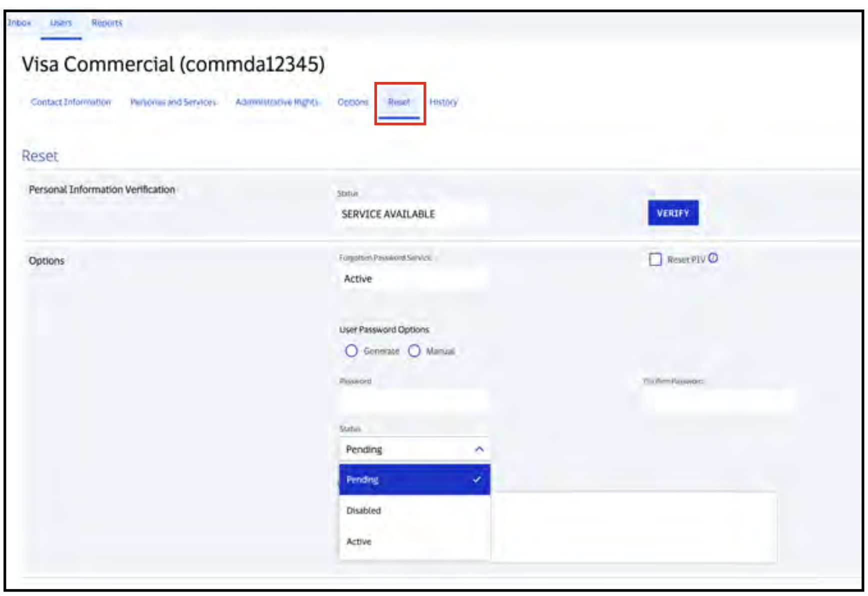


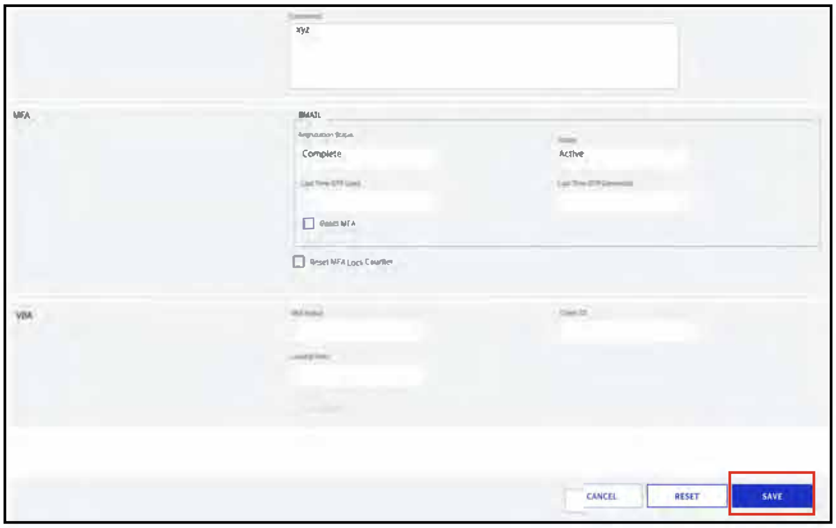
a. Enter the user’s Login ID in the Search are and on the "Magnifying Glass" icon to initiate the search or use advanced search as described above.

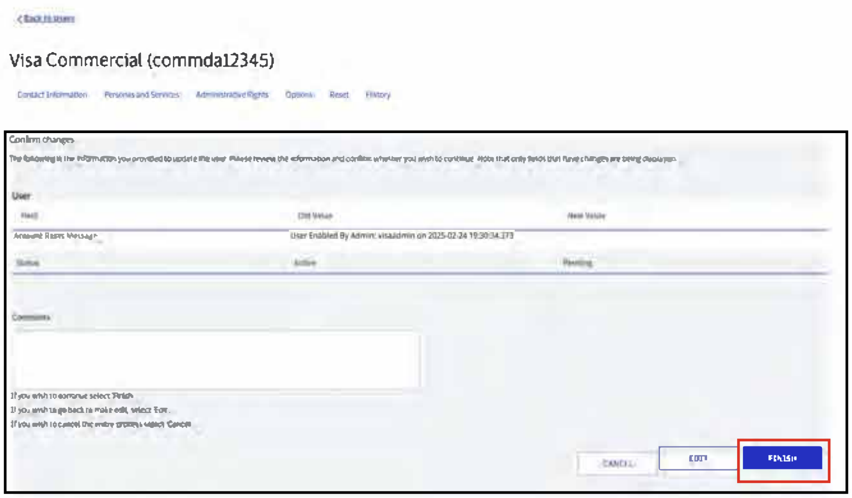
b. Click on the Login ID Hyperlink and edit the user details. You can navigate to the Contact Information, Personas and Services, Administrative Rights, Options, Reset to view or modify user details accordingly,

c. To update the status Click on the **Reset** field and choose the appropriate status option in the drop-down menu

d. After editing the required details click **SAVE** and the you will be redirected to final confirmation page, verify the changes and click **FINISH**.



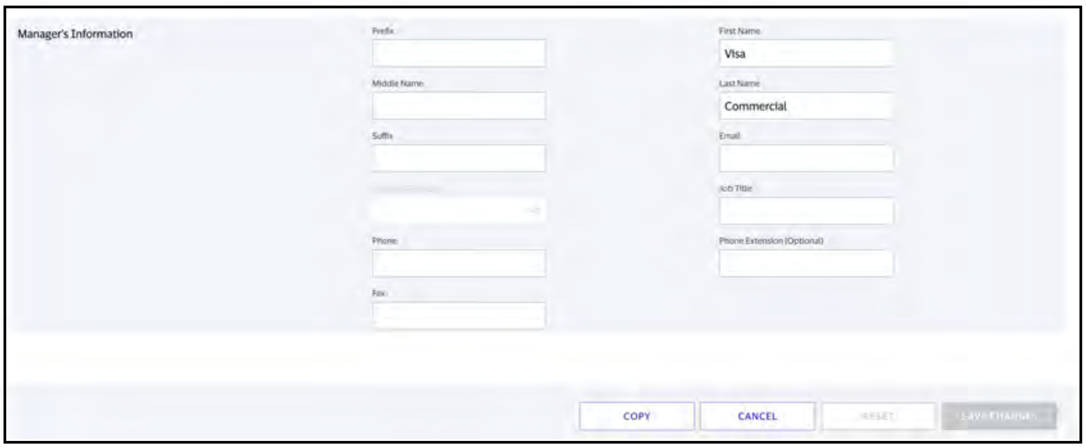

xyz
MFA
EMAIL
Complete
Active
Reset MFA
Reset MFA Lock Counter
CANCEL
RESET
SAVE


Visa Commercial (commda12345)
Contact Information
Personas and Services
Administrative Rights
Options
Reset
History
Confirm changes
User
Account Reset Message
User Enabled By Admin: visaadmin on 2025-02-24 19:30:34.373
Status
Active
Pending
Comments
CANCEL
EDIT
FINISH

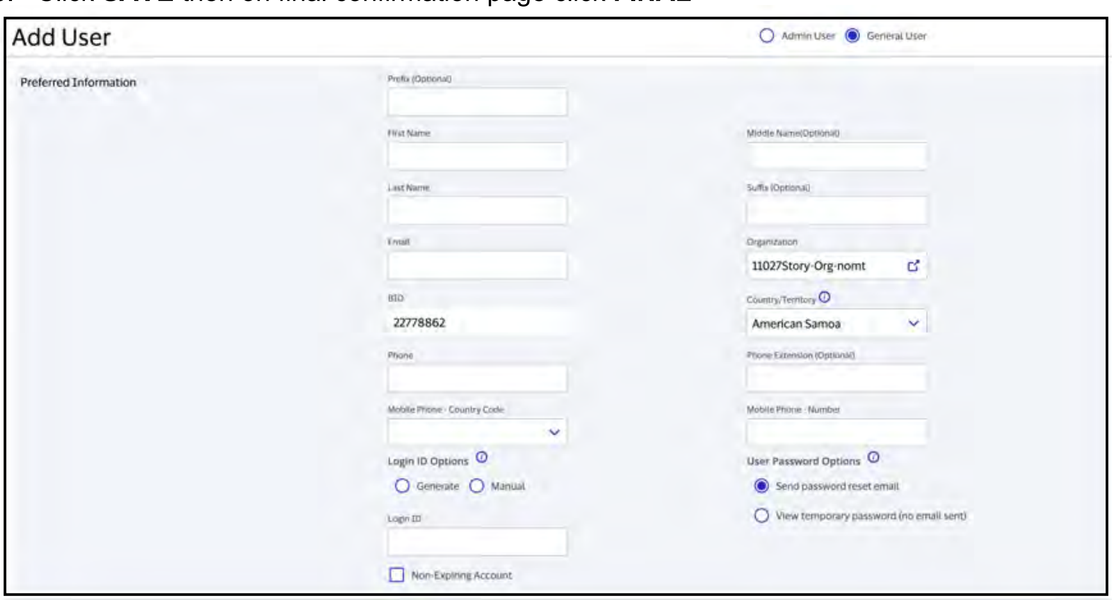
Copy User

Delegated Admin includes a Copy User feature which allows an existing user's settings to be used as the base settings to create a new user.
The Copy User feature is only available after the source user is found by performing a search on the user.
Once the source user is found, the copy process is started from within the source user account.

i. Select the EDIT USER button on Welcome page, Search for the user you want to copy.
ii. Click on the Login ID Hyperlink, scroll to the bottom.
iii. Click on **Copy** option located in the lower left corner of the screen of the selected account. A new user is created based on the information of this source user.

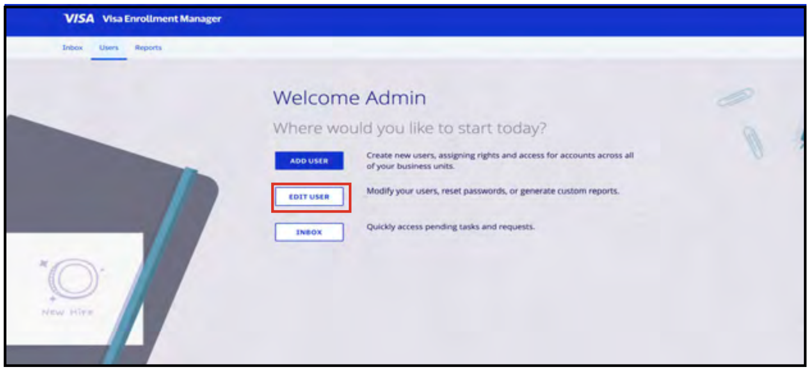


1. You will be redirected to Add User page. The Add User screen is displayed with pre-populated information from the source user account, including the default persona's subscriptions and the user's administrative scope/rights.
2. Provide the following target user information as applicable to complete the Add operation:
   - Fields (some mandatory) in the Contact Information screen, except for the Organization and Region fields, which are replicated from the target user.
   - Login ID and Password
3. Click **SAVE** then on final confirmation page click **FINAL**

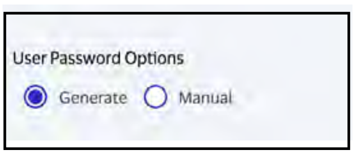


Reset the Password

To reset a user's password, you may click the **EDIT USER** button from the welcome page



a. Enter the user's Login ID in the Search field and on the "Magnifying Glass" icon to initiate the search.
b. Click on the Login ID Hyperlink and click "Reset" menu
c. User Password Options:
   i. "Generate" – this option will generate a random password for the user.
   ii. "Manual" – administrators can set password on their own.



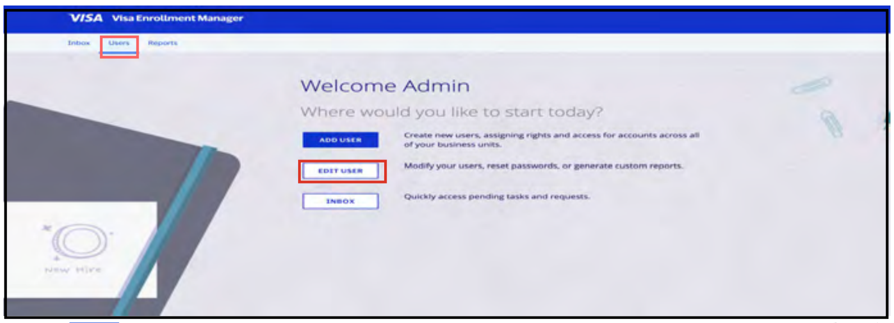
d. If the "Generate" option is selected, the system will generate a random password for the user. Administrators can view this system-generated password on the confirmation page and in a pop-up that appears when user creation is successful. The administrators must then share the password directly with the user, as it will not be sent via email.
e. If the "Manual" option is selected, administrators can set a custom password. Administrators must share it directly with the user as it won't be sent via email.
f. Click on **SAVE**.
g. When resetting the password and if the user's status is Disabled, the system will automatically enable the ID and change the status to the original state (e.g., Active, Pending).
h. On the confirmation page, review the information and if necessary enter notes in the Comments area. If everything is correct, click on **FINISH**.
i. If changes are needed, click on **EDIT** to make the necessary corrections, and then be sure to click on **FINISH**.
j. If you need to cancel the entire process and not save the information, click on **CANCEL**.

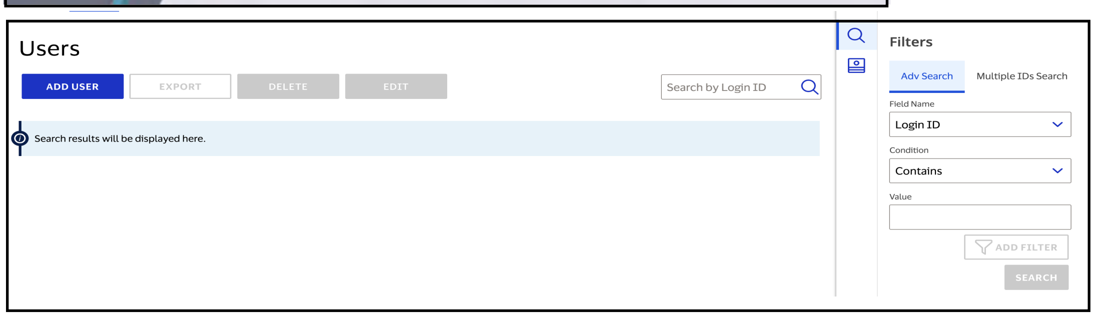
User Deletion

Users will be able to delete other users if they no longer require access. (e.g., they have left the organization or have not used account for a long time).
NOTE: You are not able to delete other admin accounts.

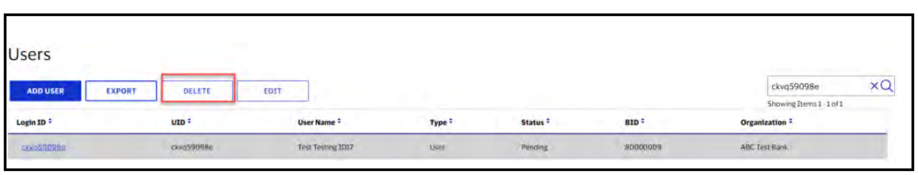
Delete a User

To delete a user, you may click the **EDIT USER** button or **USER** button from the welcome page





a. Enter the user's Login ID in the Search field and on the "<u>Magnifying Glass</u>" icon to initiate the search.
b. Click on the "row" (<u>do not click on the Login ID hyperlink</u>) and the **DELETE** button will populate.
c. Click on **DELETE**.



d. A pop-up window will appear to confirm the ID being deleted.
   i. If it is the incorrect ID to delete, click on the **X** in the upper right of the window to cancel the process and start again.
   ii. Comments are mandatory to complete the process when deleting a user; otherwise, the system will present a message and will not let you continue.
   iii. Click on **SUBMIT**.

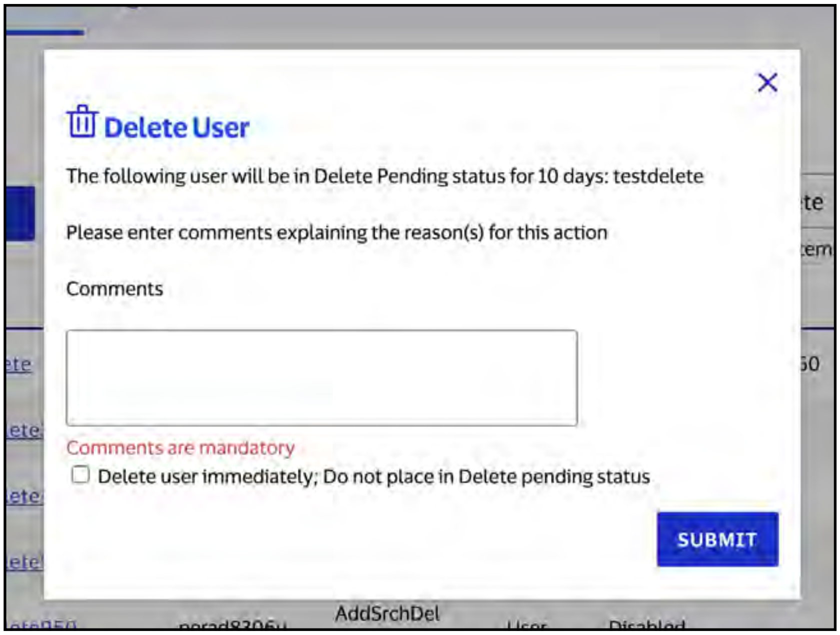
i. On the Users page, a green bar will be presented confirming that the user has been deleted.
ii. Click on **X** to remove the green bar.
iii. Important: After completing the deletion, the user's status changed from Active, Disabled, Pending to "Delete Pending". The profile will remain in this state for 10 days before it is completely removed.

Immediate Delete

In the pop-up window that appears to confirm the deletion of ID, a check-box appears that gives user option to do immediate delete of the selected login ID
If that check-box is selected, ID will be deleted with immediate delete and status will be Delete inplace of Delete Pending, and there is no option to reactivate that ID.

Important:

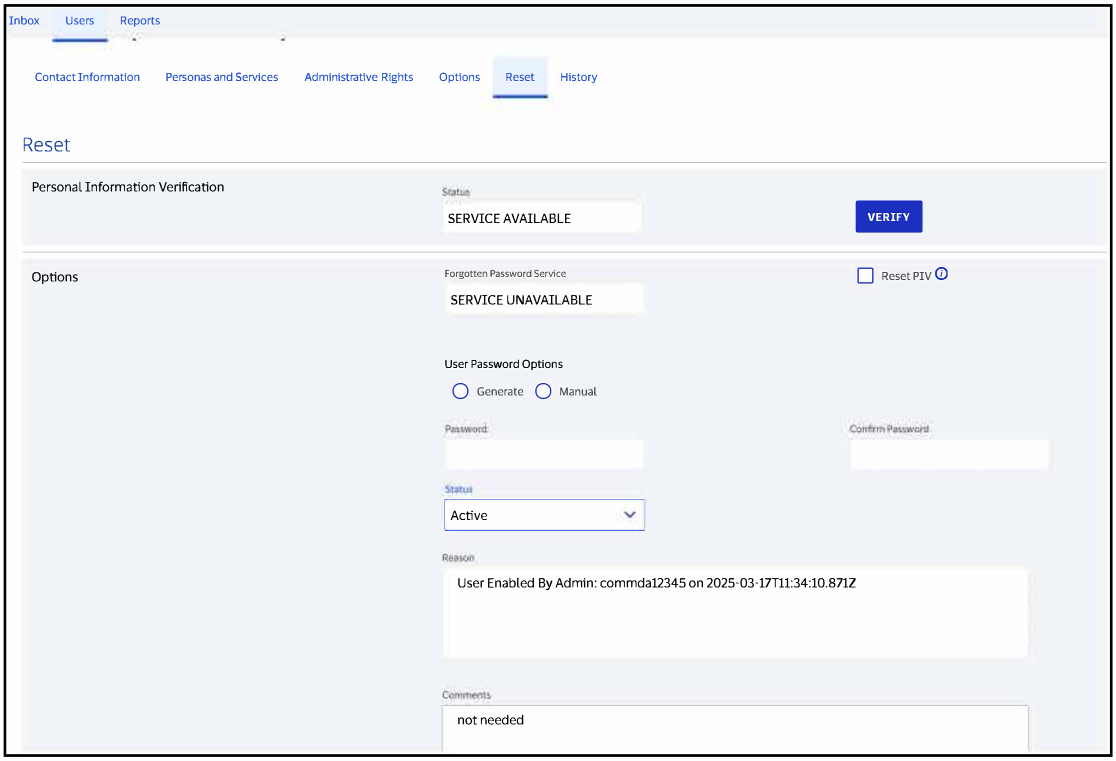
1. If you need to undelete the user's ID and make it active again, the re-activation of the ID must be performed within the 10 days grace period. After the ID has been re-activated, the user's Login ID, Password, and service entitled to the user will remain intact.
2. For immediate delete, there is no option to undelete the user's ID and make it active again.



Reactivate (undelete) a User

a) Enter the user's Login ID in the Search field and on the "Magnifying Glass" icon to initiate the search.
b) Click on login Id hyperlink then click on the Reset menu, click on the Status drop- down and choose Active.
c) Scroll to the bottom of the page and click SAVE
d) On the confirmation page click FINISH to confirm the changes.
e) A green pop-up will appear on the screnn, confirming the changes. Click on X to remove the pop-up

Important:
If you need to undelete the user's ID and make it active again, the re-activation of the ID must be performed within the 10 days grace period. After the ID has been re-activated, the user's Login ID, Password, and service entitled to the user will remain intact.



Inbox Users Reports

Contact Information Personas and Services Administrative Rights Options Reset History

Reset

Personal Information Verification

Status

SERVICE AVAILABLE

VERIFY

Options

Forgotten Password Service

SERVICE UNAVAILABLE

Reset PIV

User Password Options

Generate Manual

Password

Confirm Password

Status

Active

Reason

User Enabled By Admin: commda12345 on 2025-03-17T11:34:10.871Z

Comments

not needed

Confirm changes

The following is the information you provided to update the user. Please review the information and confirm whether you wish to continue. Note that only fields that have changes are being displayed.

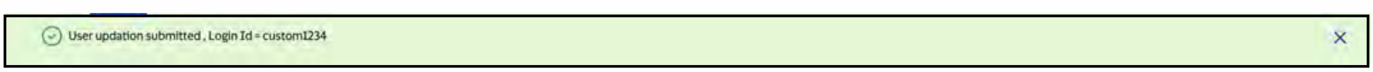
User

Field	Old Value	New Value
Account Reset Message	User Enabled By Admin: commda12345 on 2025-03-06T06:26:35.426Z	User Enabled By Admin: commda12345 on 2025-03-17T11:34:10.871Z
Status	Delete Pending	Active

Comments

If you wish to continue select 'Finish'.
If you wish to go back to make edit, select 'Edit'.
If you wish to cancel the enitre process select 'Cancel'.

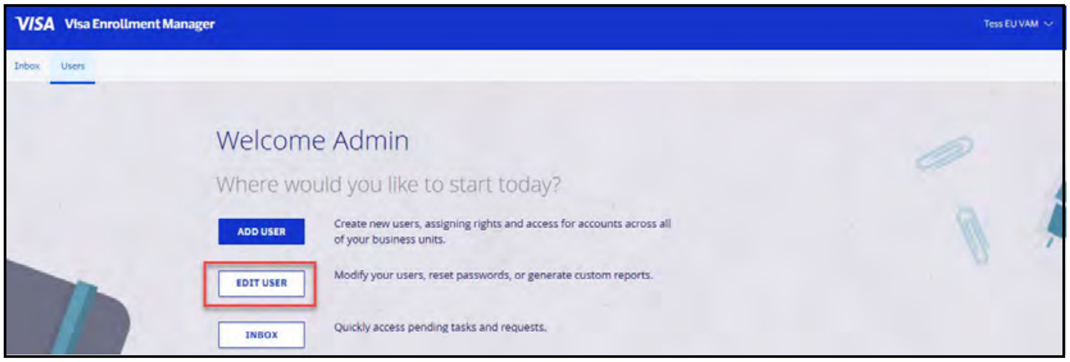
CANCEL EDIT FINISH



User updation submitted , Login Id = custom1234

Create New Administrator

To convert an existing user to admin you may click the EDIT USER button from the Welcome Page.



1. Enter the user's Login ID in the Search field and on the "Magnifying Glass" icon to initiate the search.
2. Select the ID you want to edit by clicking on the Login ID hyperlink.
3. Click on the Assign as Admin box from the Contact Information menu.
4. Click on Save Changes

NOTE: A user can also be assigned as an admin at the time of creation by just selecting the user type as Admin user as shown in Fig. 49

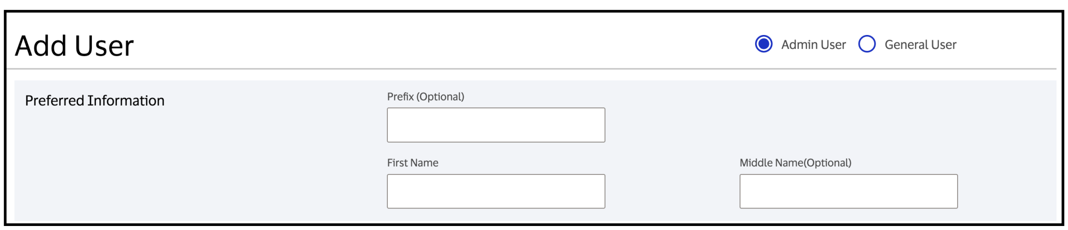
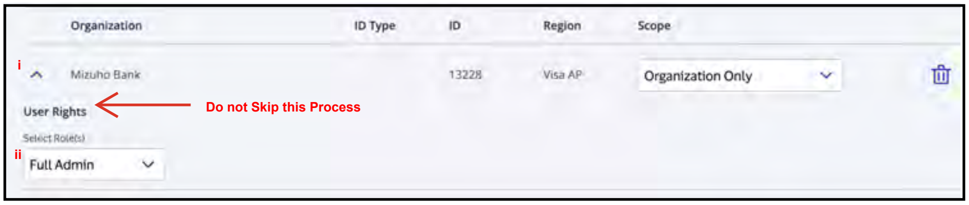


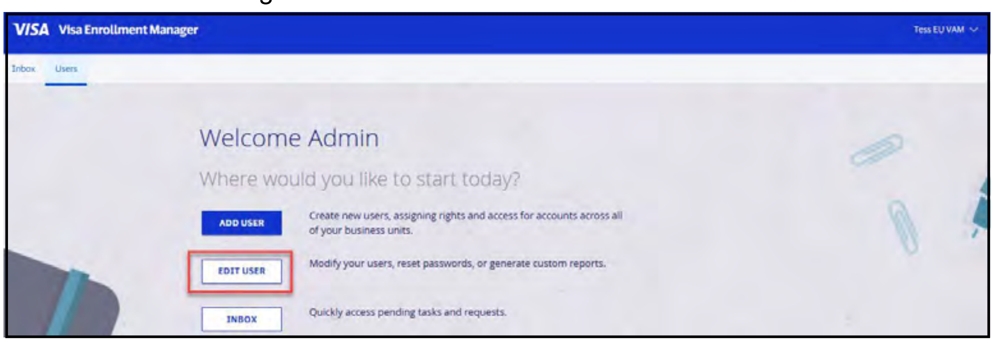
Fig. 49



5. Click on Persona and Services menu
   i. Click the arrow next to Persona ID
   ii. Select the resource privileges for the administrator to grant access to users within your organization and click **SUBMIT**.
   iii. Select the role(s) that the administrator needs to assign to users.
   iv. Click **SAVE CHANGES** and **FINISH**.

Remove Administrator Access

To remove administrative access from a user, you may click the *EDIT USER* from the Welcome Page or USERS button.



a. Enter the user's Login ID in the Search field and on the "Magnifying Glass" icon to initiate the search and click on the Login ID hyperlink.
b. From the Contact Information menu, "**uncheck**" the Assign as Admin box.
c. Click on Personas and Services menu.
   i. Click the *arrow* next to Login ID.
   ii. Click on the trash can icon to remove the access to the VEM Delegated Admin service.
   iii. Click **SAVE CHANGES** and **FINISH**.

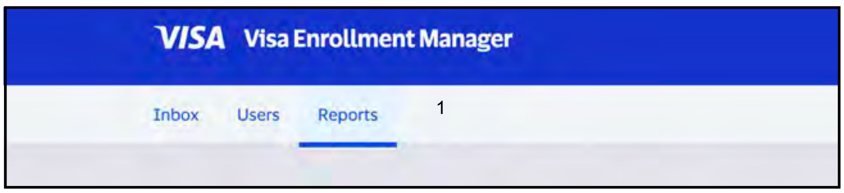
User Report

Visa Enrollment Manager administrators will be able to generate, view and download the following types of reports :

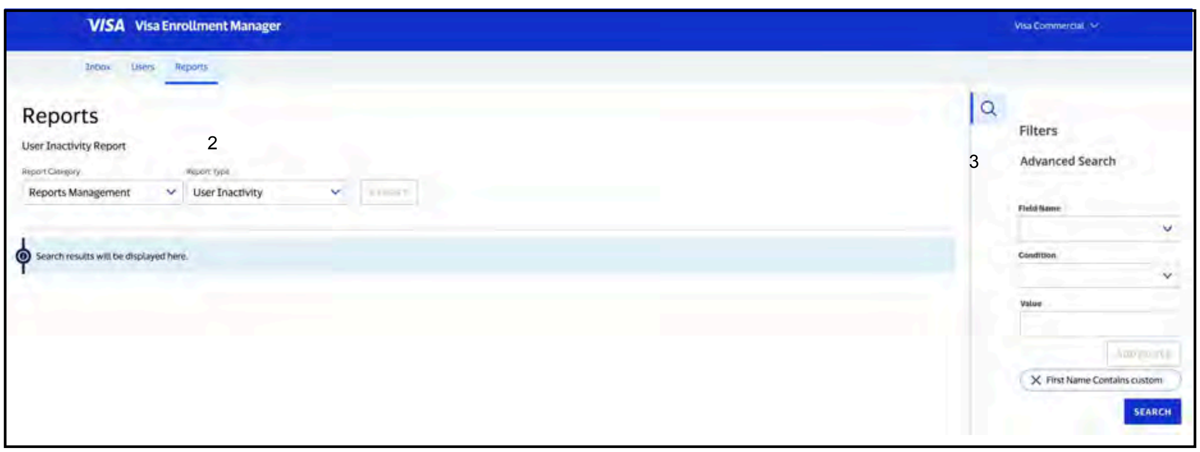
i. User inactivity report
ii. User profile report (user profiles, privileges, subscriptions)

1. To generate a user report, you may click the Report button from the Welcome Page
2. Select Report category and the Report type.
3. Use the Advanced search to search for a particular user with custom filters.

To run the user inactivity report - Select User Inactivity from the Reports Type.

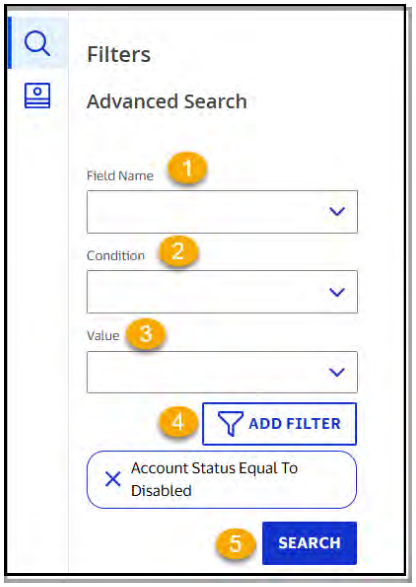


2



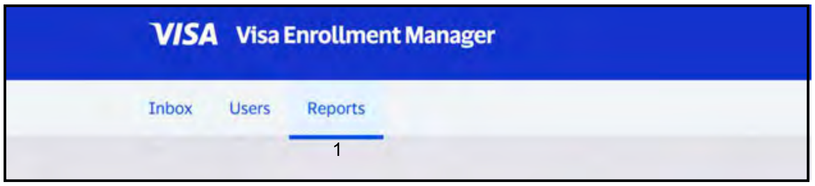
To do Advanced search -

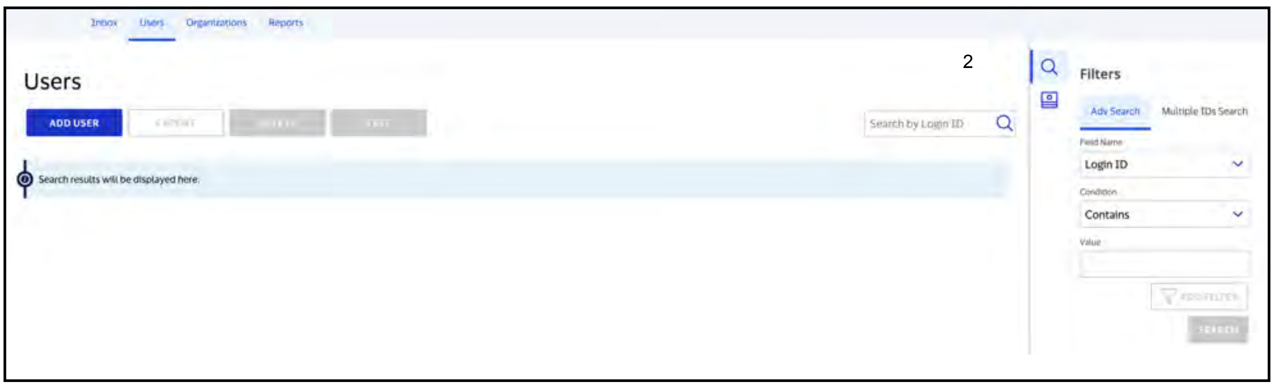
1. Choose the Field Name to use as a filter.
2. Select a Condition for the Field Name you selected.
3. Enter the Value used for the filter.
4. Click on ADD FILTER (repeat the process if you like to add more filters).
5. Click on SEARCH to see the results.

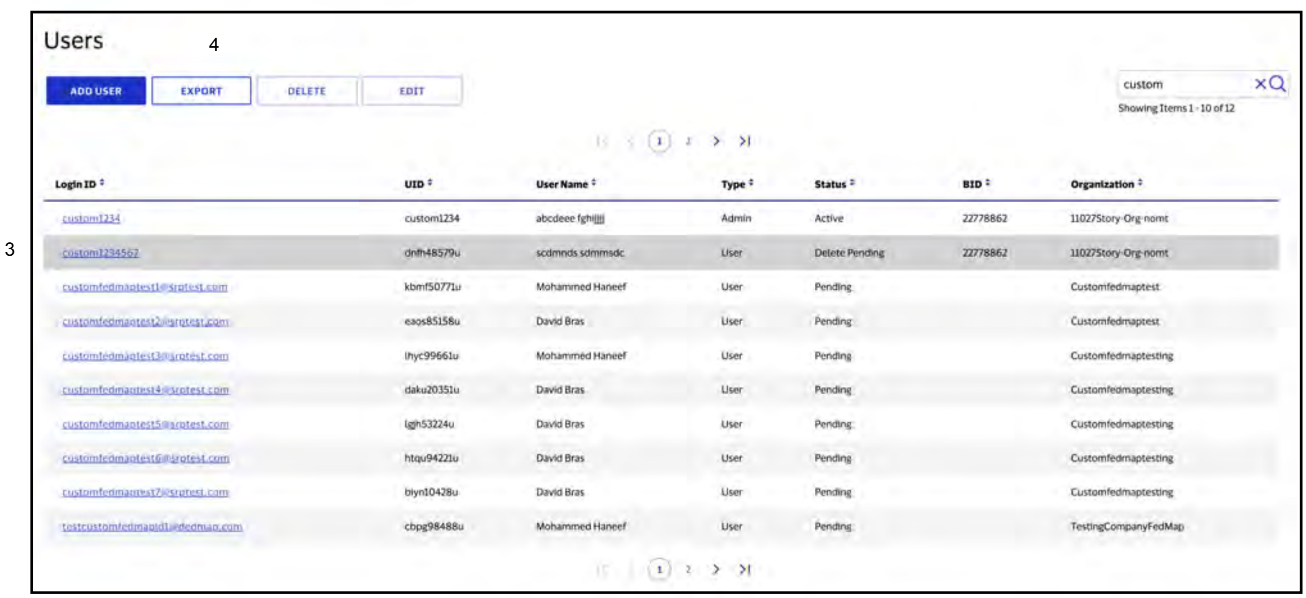


Click in **EXPORT** to download the users report in excel format

1. To generate report you can also click on REPORTS button on the Welcome page
2. Search for the user for whom you want to generate the report using Advanced search or clicking on Magnifying glass.
3. Select the user you want to generate report for.
4. Click on EXPORT to download the report in excel format







Report Descriptions -

User Inactivity Report

The following is the criteria for the User Inactivity report:

User ID
First Name
Phone
Date Range
Organization Type (Multiple) Country/
Territory (Multiple) User Status
Enrollment Date

Login ID
Last Name
Email
Organization (Multiple)
Region (Multiple)
Country/Territory Code
User Type Last Login
Date

User Profile Report

The following is the criteria for the User profile report:
User ID
First Name
Last login Date
Account Status
Days since last login
Login ID
Last Name Organization (Multiple)