

Branch Administration Web Application

Quick Reference Guide

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What is the Branch Administration Web Application?

The Canada Savings Bonds program allows Financial Institutions and Dealers the ability to maintain their own address database through the Branch Administration Web Application. With this application you can add, update and delete branch information at any time.

Every year in September, Canada Premium Bonds campaign materials are shipped to your branches. The materials will be shipped to the branch addresses shown in this application. Orders placed by branches on www.csborders.ca will also be shipped to the addresses shown in this application.

Getting Started

How do I access the Branch Administration Web Application?

The application can be accessed at:

<http://www.csborders.ca/eng/orgadmin/Login.aspx>

How do I get my login credentials?

If you need help retrieving your login credentials, please send an email to Erin Coyle:

mcle@bankofcanada.ca

Who can use the Branch Administration Web Application?

This application is intended to be used only by the head office of each institution. Individual branches are not able to access the application to modify their contact information.

Login Page

Once you navigate to <http://www.csborders.ca/eng/orgadmin/Login.aspx> you will be presented with the login screen (Figure 1).

Logging in

- Enter your 4 digit Institution ID. You must enter all 4 digits including leading zeros. Example: Institution # 123 would be entered as "0123"
- Enter your password. Note that the password is case sensitive.
- Click the *Login* button

Change language

You can change language by clicking on the language button in the upper left side of the screen. When you are on the English site, the language button will read *Français*.

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Français

Financial Institutions Administration Login

Institution ID

Password

Login

[Bookmark this page](#)

[Important Notices](#)

Figure 1: Login screen

Home Page

Once you have successfully logged in, you will find yourself on the Home page (Figure 2). The layout is very simple, with five functions available to you.

Navigation Menu



- Français: Brings you to the French version of the site. You will remain logged in but will lose any unsaved changes.
- Home: Link to the Home page.
- View Kits: Displays all available kits and their contents. Kits will be explained later on in this guide.
- Report: A page where you can view and download a report on all branches linked to your Institution ID.
- Log out: Closes your session and brings you back to the Login page.

Search

At the top of the Home page you can complete a search for a specific branch.

The most useful search field is the “Branch Number”. In this field you can enter the five digit branch number and then click *Search*. If the branch exists, it will be displayed in the branch search results table at the bottom of the screen. Note that you must enter 5 digits, including leading zeros (example: 00123 instead of 123).

If your institution uses different names for the branches, you can search by name using the “Company Name” field. This will only give a good result if your branches have different names.

You can limit the amount of branches displayed at one time by changing the default value in the “Number of Records” field. If your search returns more than one page of results, a page navigation bar will appear below the search results table.

As a part of the search section, there is an option to *Add New Branch*. This will be explained later on in this guide.

Branch Search Results

By default, the Home page initially shows all the branches currently linked to your Institution ID. When there are multiple pages of branches, a page navigation link will appear at the bottom of the page. You can use this to navigate through all your branch listings.

If you performed a search, only the branches meeting your search criteria will be displayed.

Your search results can be sorted by Branch, Company Name or City by clicking on those words in the title bar.

You can *Edit* and *Delete* branches listed on the Home page. These two features will be explained further on in this guide.

The screenshot shows the 'Search for Existing Branch' section of the website. It includes a search form with the following fields and values:

- Institution ID: 0177
- Branch Number: (empty)
- Institution Name: BANK OF CANADA
- Company Name: (empty)
- Number of records: 50

Buttons for 'Search' and 'Add New Branch' are visible. A red note states: '* Please Note: The Branch ID must contain numerical values only.' Below the form is a table with one row of search results:

Edit	Delete	Branch	Company Name	City
		00177	BANK OF CANADA	OTTAWA

The footer of the page shows 'Date Modified: 2009-06-08' and a link for 'Important Notices'.

Figure 2: Home Page

Editing an Existing Branch or Location

From the Home page you can find a branch either by typing the branch number into the Branch Number field and clicking *Search*, or by scrolling through the list of branches linked to your Institution ID.

When you have found the branch you want to edit, click the *Edit* button (an icon of paper and a pencil) to begin editing the branch.

This will bring you to the Edit Location page (Figure 3).

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Frçais Home View Kits Report Log Out

Current Page: Edit Location

Edit Branch Information

Institution ID: 0177
 Branch: 00177
 Institution Name: BANK OF CANADA
 Institution City: OTTAWA
 Language: French

Cancel Update

Add New Location

Edit	Delete	Branch Name	Address	City
		Bank of Canada	234 Laurier Avenue West	OTTAWA

Edit Branch Location

Branch Name: Bank of Canada
 Contact Information: John Smith
 Address 1: 234 Laurier Avenue West
 Address 2: 6th Floor
 City: OTTAWA
 Country: Canada
 Province: Ontario
 Postal Code: K1P6K6
 Kit and Size: Kit 1 - RBC & TD Canada Tru.

CPB Application Form: 5
 CPB Terms & Conditions: 5
 Kit Contents - RBC & TD: 1
 Sales Guide for Branch Staff: 5

Clear Save & Back

Date Modified: 2009-06-08 Important Notices

Figure 3: Edit Location page

From here you can:

Edit Branch Information

- Institution Name: Name of the institution.
- Institution City: City where the branch is located.
- Language: Indicates the default language for any correspondence sent to this branch.
- *Cancel* button: Brings you back to the Home page.
- *Update* button: Applies the changes you make to Institution Name, Institution City, or Language.

Add New Location

- *Add New Location* button: Allows you to add multiple locations or contacts for a specific branch.

View Branch Locations

- Branch Location Table: Displays all locations associated to this branch. You can select edit or delete to modify that specific location.
- Edit Location: If there is only one location associated to the branch, as a default it will be displayed in the Edit Branch Location. If there is more than one location, you will need to click the edit button for that branch in order to update its information.
- Delete Location: You can delete a location associated to a branch by clicking the *Delete* icon next to it. A confirmation box will appear to ensure you want to delete this location.

Edit Branch Location

- The information entered here will be used as the shipping address for the branch.
- Modify the shipping address and branch name as required.
- The “Kit and Size” drop-down list shows which CPB material kit the branch will receive in September, just before the campaign begins. To the right you will see the contents of the kit. You can select different kits for each branch depending on the branch’s needs. Refer to the “View Kits” section of this guide for more information about kits.
- Click the *Save & Back* button to update changes to the database. A confirmation window will appear when the changes have been successfully updated. You will then be brought back to the Home page.

- The *Cancel* button will clear the edit branch information boxes. It will not undo any previously saved changes. Clicking this cancel button will not bring you to the Home page.
- Once finished editing the branch you can click on the *Home* link to continue editing other branches or click *Log Out* to end your session.

Remember: Be sure to save your changes before navigating away or those changes will be lost.

Deleting a Branch or Location

From the Home page you can find a branch either by typing the branch number directly into the Branch Number field and clicking *Search*, or by scrolling through the list of branches linked to your Institution ID.

When you have found the branch you want to delete, click the *Delete* button (an “X” icon) to delete the branch.

Note: If your branch has multiple locations associated with it and you only want to delete one, you will need to click the *Edit* button for that branch then delete it from the Edit Location Page.

A confirmation window will appear asking if you are sure you wish to delete this branch (Figure 4).

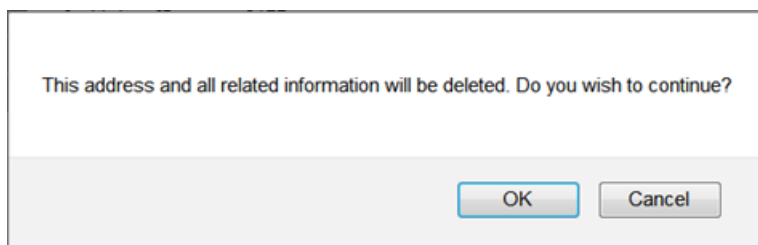


Figure 4

Once you click *OK*, all information and locations for that Branch will be **permanently deleted** from the database. You will not have the option to restore this information automatically.

Clicking *Cancel* will stop the deletion from occurring.

If you delete a branch in error you can simply click the *Add New Branch* button found on the Home page and re-enter the branch information.

Adding a New Branch

From the Home page select the *Add New Branch* button to add a new branch. This will bring you to the Add Branch page (Figure 5).

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Français Home View Kits Report Log Out

Current Page: Add Branch

Home View Kits Report Log out

Add New Branch

Institution ID: 0177
Branch: *
Institution Name: BANK OF CANADA
Institution City:
Language: English

Cancel Add

* Please Note: The Branch ID must contain numerical values.

Add Branch Location

Branch Name:
Contact Information:
Address 1:
Address 2:
City:
Country: Canada
Province: Alberta
Postal Code:
Kit and Size: Kit 1 - RBC & TD Canada Tru:

Clear Save & Back

Date Modified: 2009-06-08 Important Notices

Figure 5: Add Branch page

You will then need to enter information in the following fields under “Add New Branch”:

- Branch: Enter the branch number. Note that the branch number must be 5 digits long. If the branch number is 123 then enter “00123”.
- Institution City: City where the branch is located.

Click the *Add* button and a confirmation window will appear stating that the branch has been added. Clicking the *Cancel* button will bring you back to the Home page and the new branch will not be added.

You will now need to enter a location for this branch. Enter the contact and shipping information for this branch in the fields under “Add Branch Location”.

- Be sure to select the correct “Kit and Size” for this branch. To view the contents for a specific kit you can select the kit type in the Kit & Size drop-down menu, which will trigger the kit contents to be displayed. Select the kit that makes the most sense for this branch.
- The *Clear* button will clear the “Add Branch Location” fields
- The *Save & Back* button will verify all mandatory fields are completed then save the information. A confirmation window will appear:
 - *OK* will save the changes and bring you back to the Home page.
 - *Cancel* will keep you in the “Add Branch Location” section without saving the changes.

View Kits

Every year in September a kit will be shipped to your branches containing marketing and administration materials required to run a successful Canada Premium Bonds campaign. Different locations have various requirements depending on the type of activities they provide to clients. Selecting the correct kit ensures the branch receives the appropriate materials.

Selecting the *View Kits* link will take you to the Kit Descriptions page, which lists the available kits and their contents (Figure 6). When editing a branch you must select the kit that best suits the needs of that branch.

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Français | Home | View Kits | Report | Log Out

Current Page: Kit Descriptions

Home
View Kits
Report
Log out

Kit Descriptions

Kit 1 - RBC & TD Canada Trust	Standard
CPB Application Form	5
CPB Terms & Conditions	5
Kit Contents - RBC & TD	1
Sales Guide for Branch Staff	5

Kit 2 - FIs (excl. RBC & TD)	Standard
CPB Application Form	20
Kit Contents - Financial Institutions	1
Sales Guide for Branch Staff	5

Kit 3 - Dealers	Standard
Kit Contents - Dealers	1
Summary Terms & Conditions	20

Kit 4 - No Materials	Standard
No Materials	0

Date Modified: 2009-06-08 | Important Notices

Figure 6: Kit Descriptions page

Report

The Report page allows you to view a list of all branches linked to your Institution ID (Figure 7) and download an Excel report with details on each branch. The report contains the following information for each branch:

- Branch number. Number format: [BOC][4-digit Institution ID][5-digit Branch Number]
- Branch name
- Address
- Selected kit

To download the report, select the *Generate* button and open or save a copy of the Excel file.



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Frçais Home View Kits Report Log Out

Current Page: Report

Home
View Kits
Report
Log out

Report

Generate

Branch	Branch Name	Address	City
00177	Bank of Canada	234 Laurier Avenue West	OTTAWA

Date Modified: 2009-06-08

Important Notices

Figure 7: Report page

Closing the Session

When you have finished updating your branches you can close the session by clicking *Log Out*. This will log you out of the application and return you to the Login Page.

Be sure to save your changes before ending your session.

FAQs

- Q. Can I change Head Office contact information with this application?
A. No, you can only change branch level information. Please email your Bank of Canada contact to update your head office information.
- Q. Can I change my Institution ID?
A. No, your institution ID is linked to your entire institution and cannot be changed. Only the Bank of Canada can update this number.
- Q. Can I change a Branch ID?
A. The only way to accomplish this is to delete the current branch and then add a new one.
- Q: What if the branch needs more materials than the standard kit allows for?
A: During the campaign, any branch can use the www.csborders.ca site to order additional materials. This is a free service.
- Q. Can I import branch information directly to this application?
A. Currently, it is not possible to import information to the application. You can only update a single branch at a time.
- Q. I made changes using this application, why are they not showing up on www.csborders.ca?
A. It can take up to 24 hours for the changes to take effect. If the change is still not implemented after 24 hours, email your contact at the Bank of Canada.

Contact

If you have any questions or comments about the Branch Administration Web Application, please email your contact at the Bank of Canada, Erin Coyle: mcle@bankofcanada.ca.