WISCONSIN DEPARTMENT OF FINANCIAL INSTITUTIONS (WDFI)

ACCOUNT SETUP, BASIC INFORMATION & NAVIGATION OF FILING SYSTEM

User Guide – Online User – Basic Information and Navigation

(6/2020)

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UCC and Trademark User Account Information Sheet

Wisconsin's new UCC and Trademark System offers new ways for customers to manage how they interact with the Department. User Accounts are now required for all users to access and use the features of the new system.

Benefits of Creating a User Account:

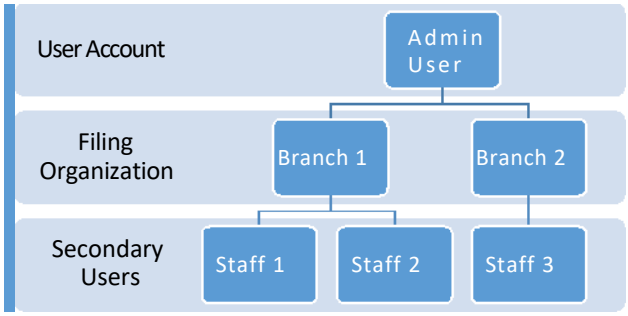
- View 90 days of filing history.
- Access filed documents for 90 days.
- Set Notifications to be alerted to filings on Originals.
- Save frequently used address information to autofill on forms.
- Manage Secondary Users and their filings under one account.

Setting Up Your Account:

It is recommended that your organization design your account structure before users begin using the system as it is not possible to split and merge accounts later. Once you create a User Account, you can use the **Personalization Menu** to define your organization structure and set up any Secondary Users.

Account Structure:

Users can choose the account structure that works best for them and their organization. Two common structures are described below, but you may find that a hybrid of these structures, or a different design all together works best for your organization.



Hierarchical Account Structure

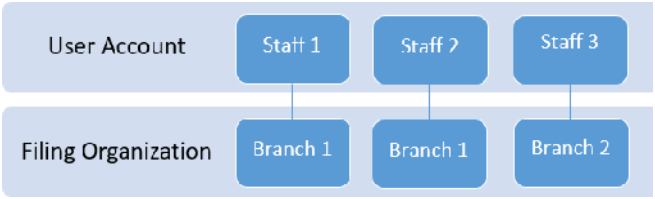
Pros:

- A single admin user can view the filing activity of all secondary users.
- Admin user can activate and inactivate secondary users as needed.
- Allows for multiple organizations to be under one main account, such as branches of a bank or filing office.

Cons:

- Only one Admin level user account can be defined.
- Autofill preferences cannot be customized per staff member.

Independent Users Account Structure



Pros:

- No administrative role user needs to be identified at your organization.
- Each staff member can manage their own autofill preferences and filing history.

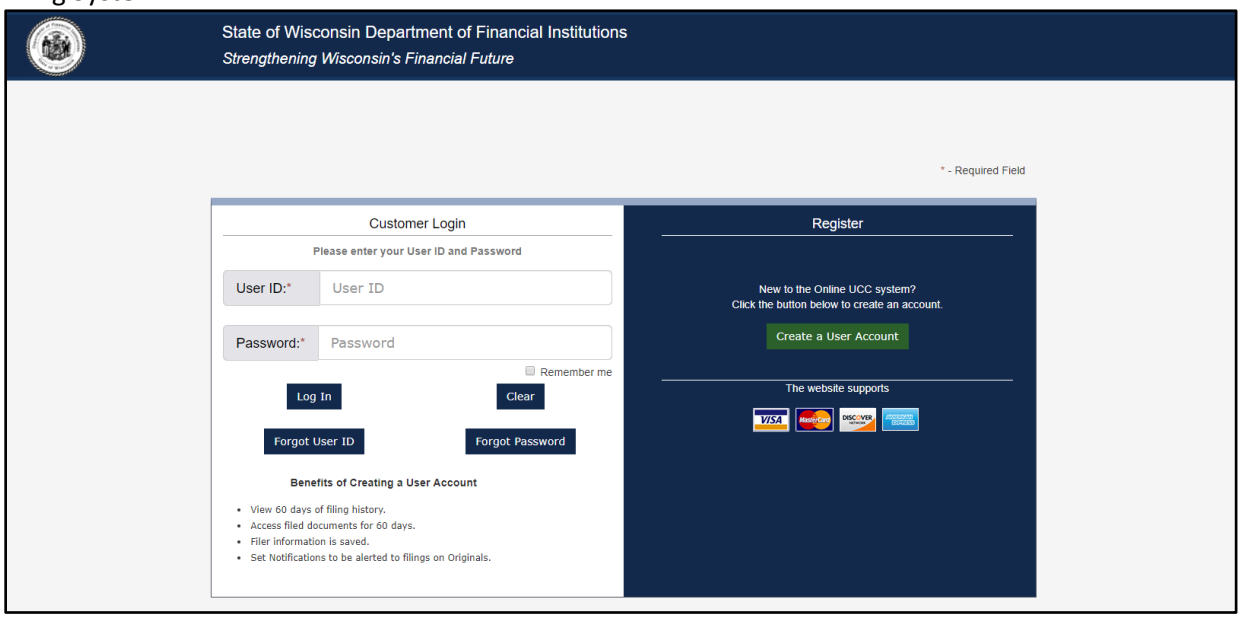
Cons:

- No admin access to staff filing history when a staff account is no longer in use.

1 Access the UCC & TM Filing System Online

1.1 Creating a New User Account

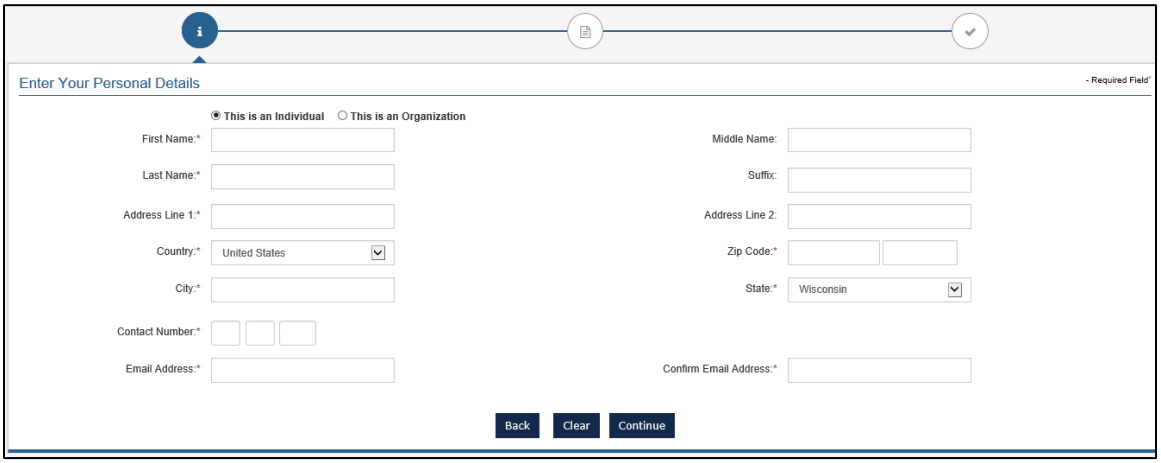
A user ID must be created in order for a user to access all of the online functionality. This process begins at the Log In screen, which is the first screen displayed when the user visits the WDFI UCC & TM Online Filing System.



1. Click the

button.

   The system displays the Personal Details screen. You can create an account as an individual or organization. See Account Information for structure.

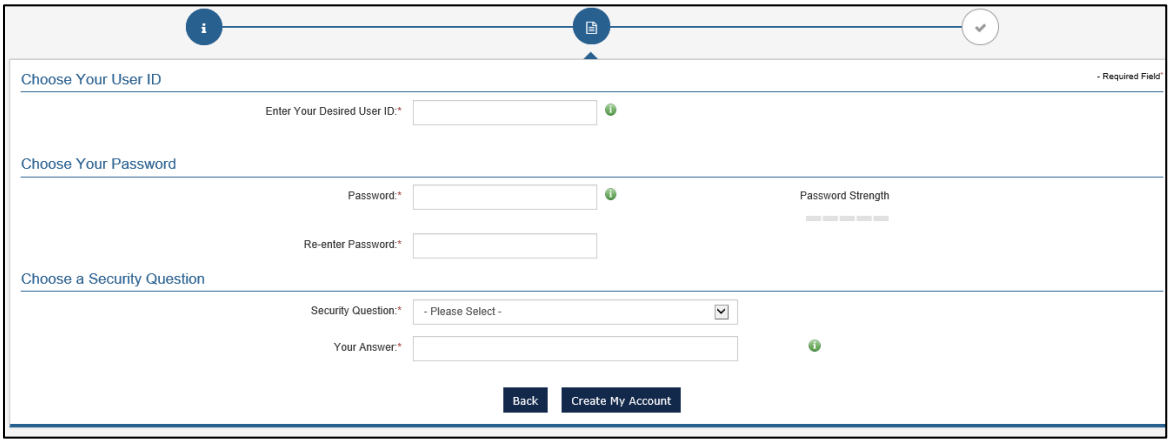


2. Complete the fields on the Personal Details screen.

> **NOTE:** The user may click the **Back** button to return to the Log In screen or the **Clear** button to clear all the fields on the Personal Details screen.

3. Click the Continue button.

   The system displays the User ID Details screen.



4. Enter a user ID in the **Enter Your Desired User ID** field.

> **NOTE:** The user ID must be between 8-32 characters in length and may only include alphabetical characters (A-Z, a-z) and/or numbers (0-9).

5. Enter the desired password in both the **Password** and **Re-enter Password** fields.

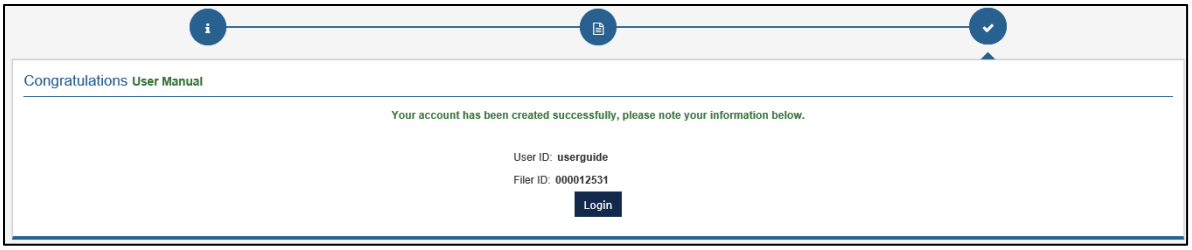
> **NOTE:** The password must match in both fields. It must be between 8-26 characters long and must contain at least one character from three of these four character types: Uppercase alphabetical, Lowercase alphabetical, Numeric, and Special Character.

6. Select a security question from the **Security Question** drop-down menu.

7. Enter an answer for the selected security question in the **Your Answer** field.

8. Click the Create My Account button.

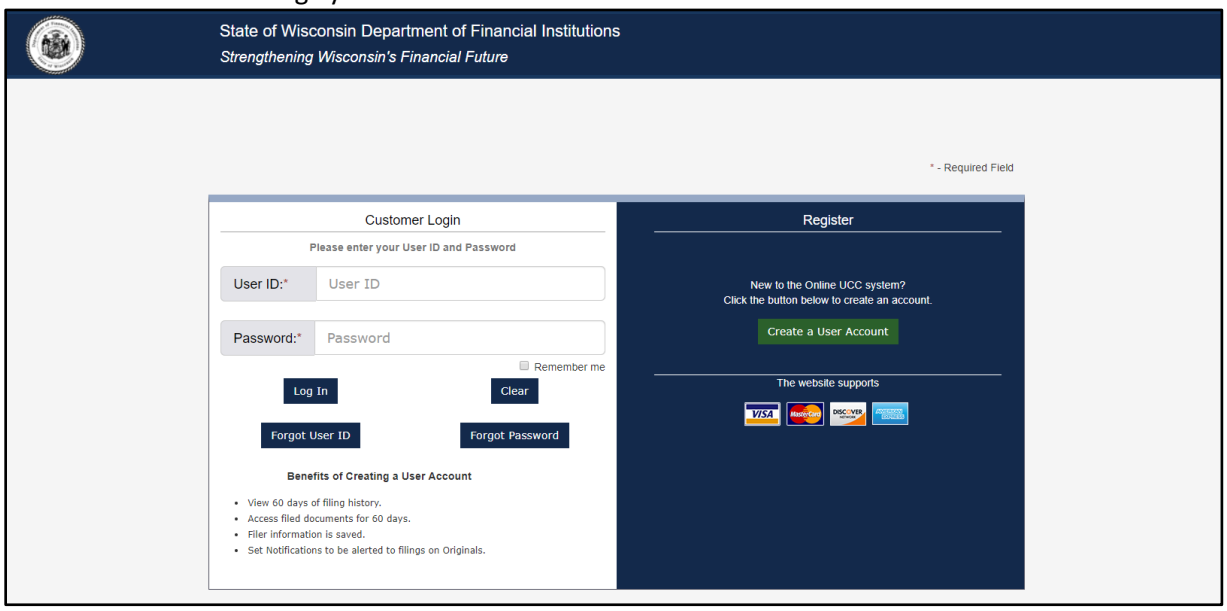
   The system displays confirmation that the new user ID has been created and sends an email to the registered email address. The confirmation screen displays the User ID and Filer ID.



NOTE: The user may click the **Login** button to proceed to the Log In screen.

1.2 Logging In

The user may log in to the application from the Log In screen. This is the first screen displayed when the user visits the WDFI Filing System.



1. Enter the user ID in the **User ID** field.

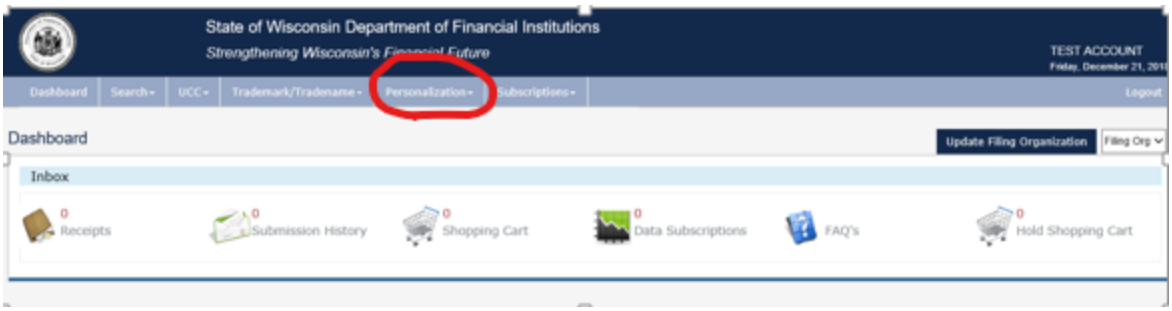
2. Enter the password in the **Password** field.

3. Click the

button.

   The system displays the Dashboard screen upon the user's successful log in.

NOTE: A user that is not already associated with a Filing Organization will be asked to create one immediately upon logging into the system for the first time. Refer to the **Filing Organization** section of this document for details.



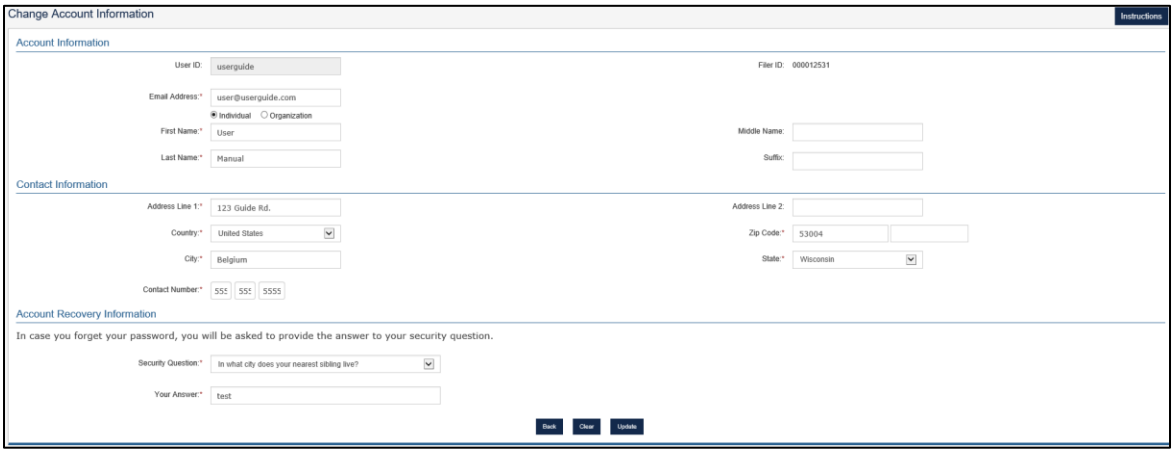
2 User Maintenance

2.1 Changing Account Information

The user may edit most of their WDFI Filing System user information at any time. The user's address information, contact information, and security question may be changed. The user ID may not be changed.

1. Select **Personalization > Change Account Information** from the header menu.

   The system displays the Change Account Information screen with the user information prepopulated.



2. Edit the user information as necessary.

3. Click the

button.

   The system saves the changes.

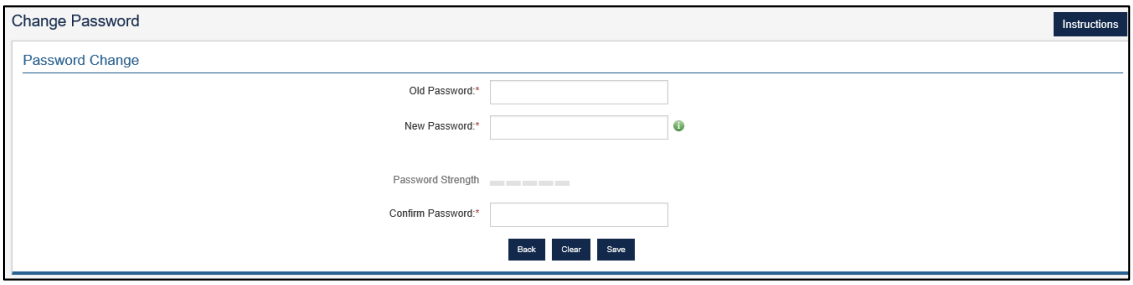
2.2 Changing a Password

The user may change their WDFI Filing System password at any time.

NOTE: This section of the document pertains to users that know their current password and are able to log into the system. If the user is unable to log in due to a lost password, refer to the **Recovering a Password** section of this document.

1. Select **Personalization > Change Password** from the header menu.

   The system displays the Change Password screen.



2. Confirm the old password.

3. Enter the new password in the **New Password** and **Confirm Password** fields.

   NOTE: The password must match in both fields. It must be between 8-26 characters long and must contain at least one character from three of these four character types: Uppercase alphabetical, Lowercase alphabetical, Numeric, and Special Character.

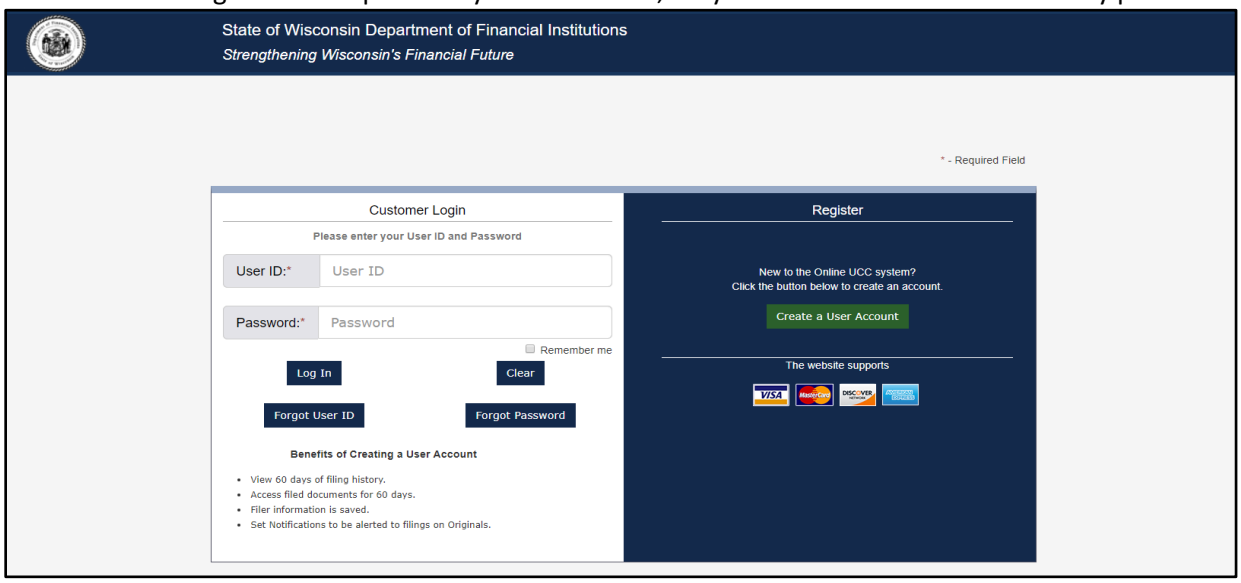
4. Click the

button.

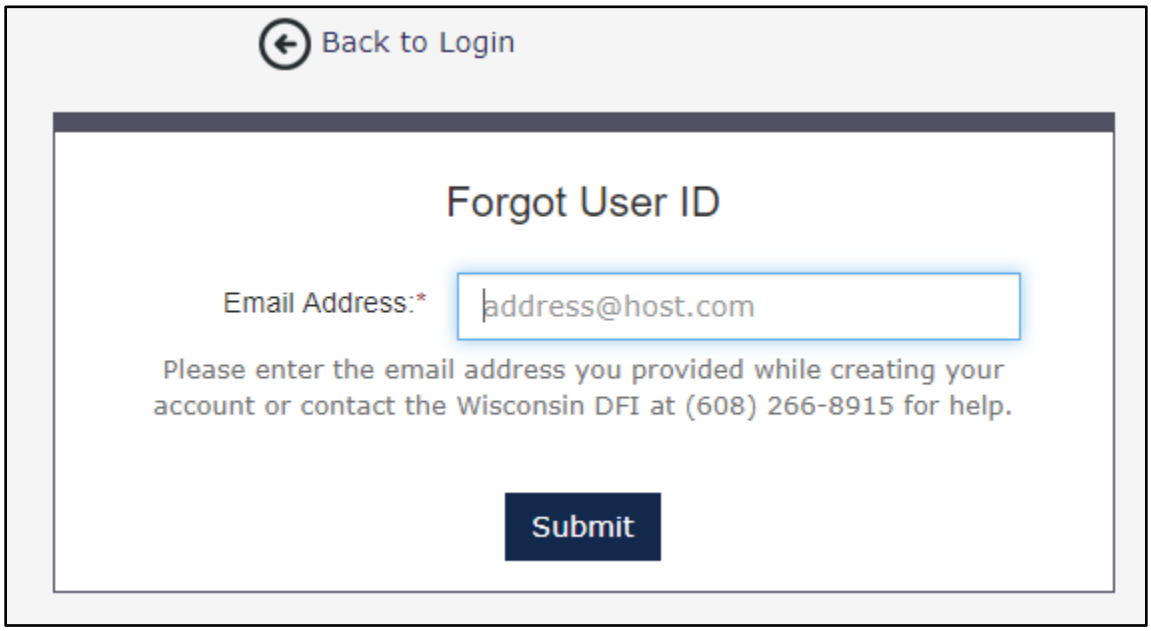
   The system saves the new password.

2.3 Recovering a User ID

If the user has forgotten their previously issued user ID, they can initiate the user ID recovery process.



1. Click **Forgot User ID** the button.



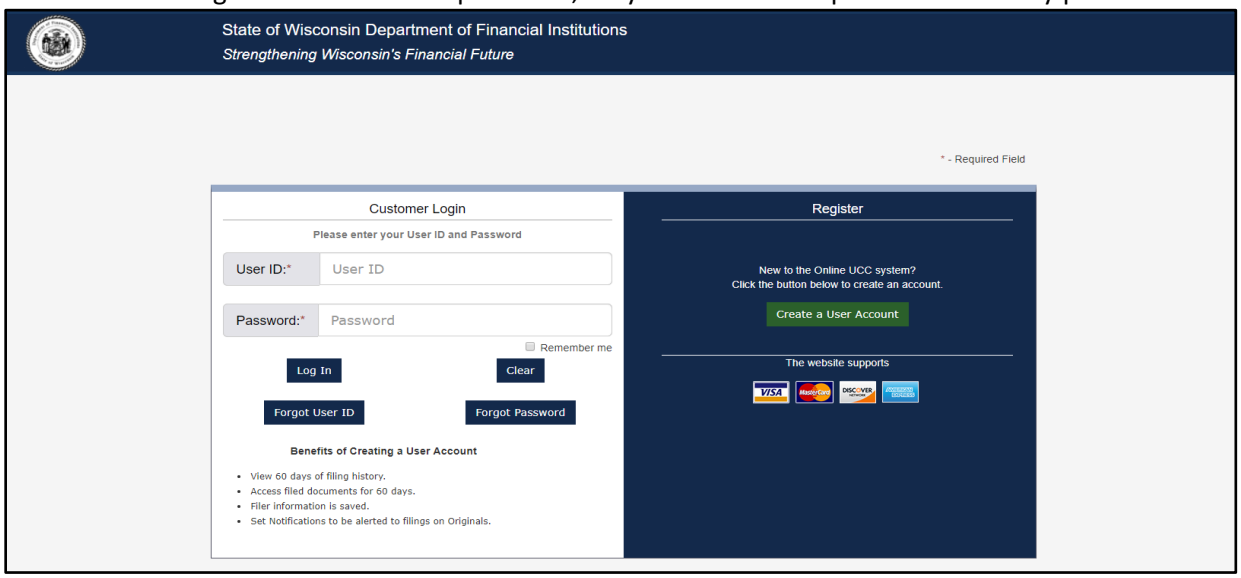
2. Enter the email address associated with the user ID in the **Email Address** field.

3. Click the **Submit** button.

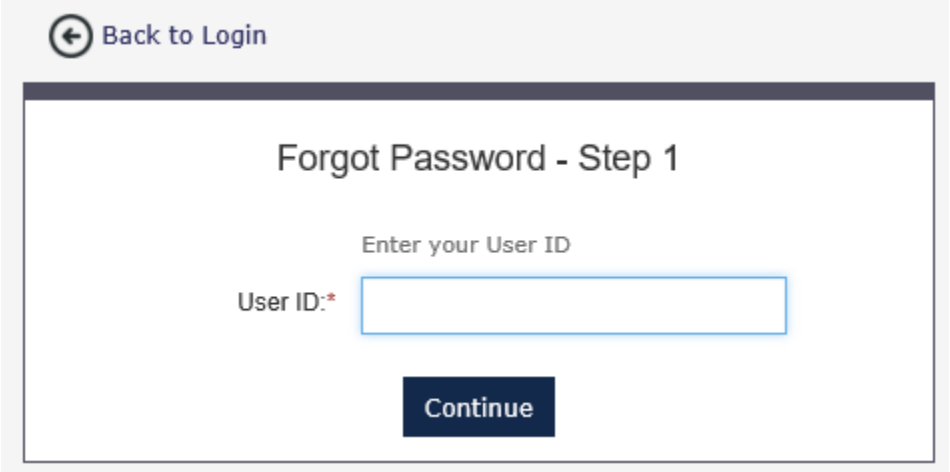
   The system sends an email to the provided email address that contains the user's name and ID.

2.4 Recovering a Password

If the user has forgotten their current password, they can initiate the password recovery process.



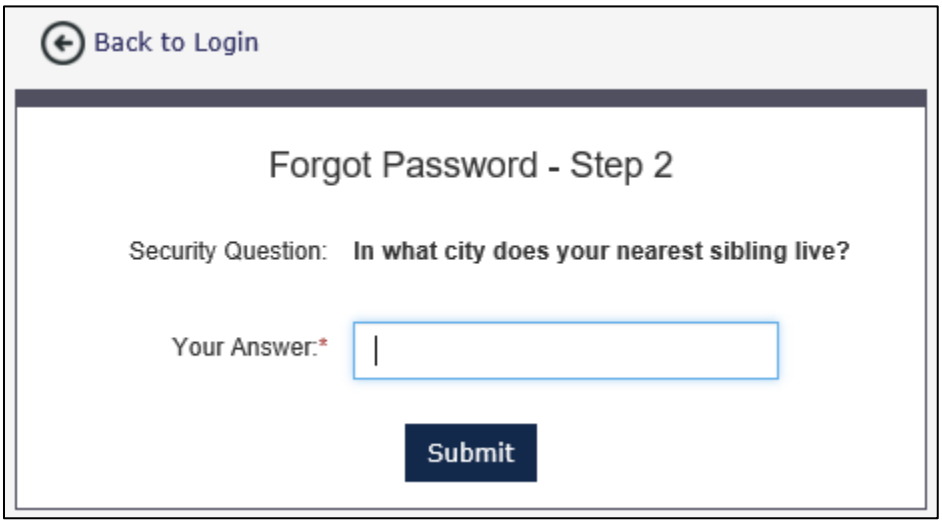
1. Click the Forgot Password button.



2. Enter the user ID in the **User ID** field.

3. Click the Continue button.

   The system displays the security question for the user ID.



4. Enter the answer to the security question in the **Your Answer** field.

5. Click the Submit button.

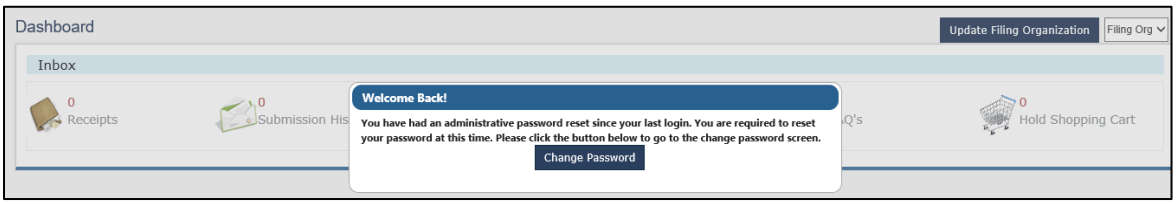
   The system sends an email to the previously provided email address that contains the user ID and a temporary password.

6. Access the password recovery email.

> **NOTE:** It can be helpful to copy the temporary password to the clipboard so that it can be pasted in the **Password** field during log in.

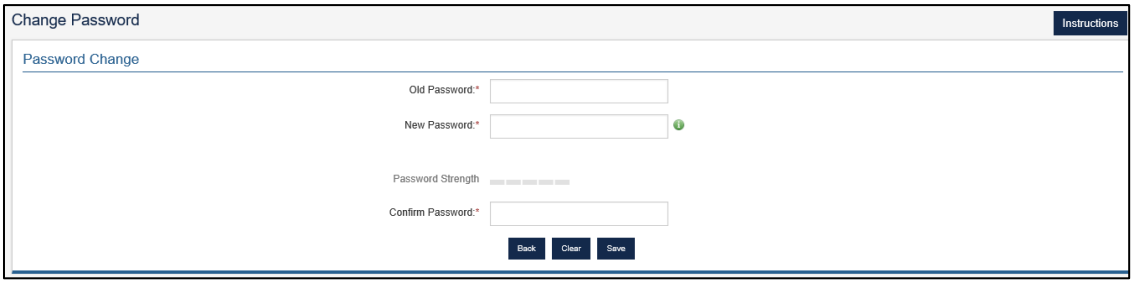
7. Log into the system using the provided user ID and temporary password.

   The system displays the Dashboard and prompts the user to create a new password.



8. Click the **Change Password** button.

   The system displays the Change Password screen.



9. Confirm the old password.

> **NOTE:** The old password is the temporary password provided in the password recovery email.

10. Enter the new password in the **New Password** and **Confirm Password** fields.

> **NOTE:** The password must match in both fields. It must be between 8-26 characters long and must contain at least one character from three of these four character types: Uppercase alphabetical, Lowercase alphabetical, Numeric, and Special Character.

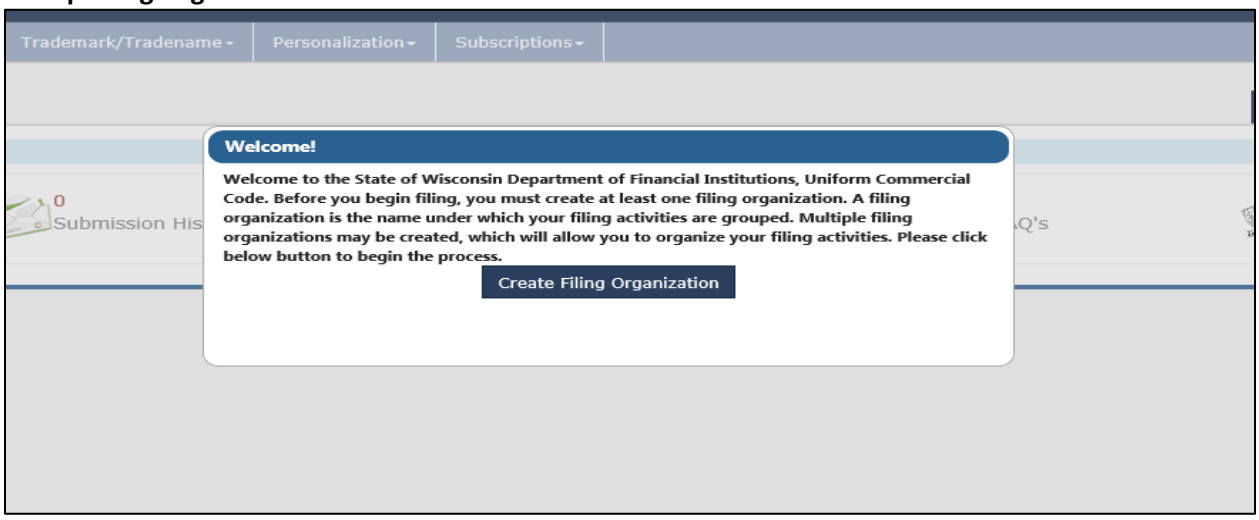
11. Click the **Save** button.

    The system saves the new password.

3 Filing Organizations

3.1 Creating a Filing Organization

All users must create a filing organization. The user is prompted to complete this process immediately upon logging into the system for the first time. This may also be accessed by click the **Personalization > Set Up Filing Organization** in the header menus.



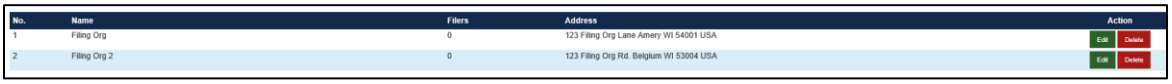
1. Click the **Create Filing Organization** button.

   The system displays the Set Up Filing Organization screen.

2. Complete the fields in the **Filing Organization** section.

3. Click the **Save** button.

   The system saves the filing organization information and displays it in the data grid.



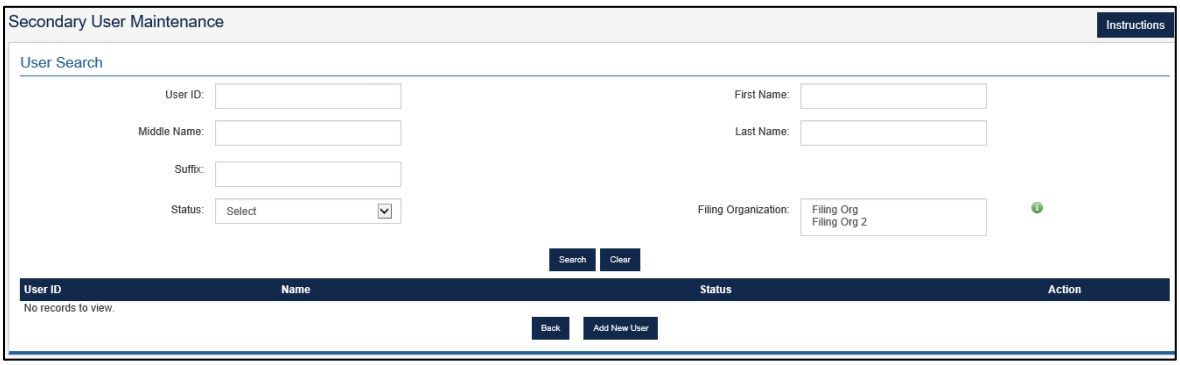
NOTE: The user may repeat steps 2 and 3 to enter multiple filing organizations after the initial filing organization is created.

3.2 Adding or Editing a Filing Organization Secondary User

Multiple users may be associated with the same filing organization.

1. Select **Personalization > User Creation** from the header menu.

   The system displays the Secondary User Maintenance screen.



2. Enter search criteria in the User Search section and click

the button to search for users.

NOTE: The search can be used to find a specific user for editing or to verify that a user has not already been entered before proceeding.

3. Perform one of the following…

To…	Then…
Add a new user…	Click the button.
Edit an existing user…	Select the user from the search results and click the **Edit** button.

   The system displays the Add/Edit User screen.

1. Complete or Edit the **User Account Information** and **Contact Information** sections.

NOTE: The User ID and Password should be retained so that they can be provided to the new user.

2. Click the

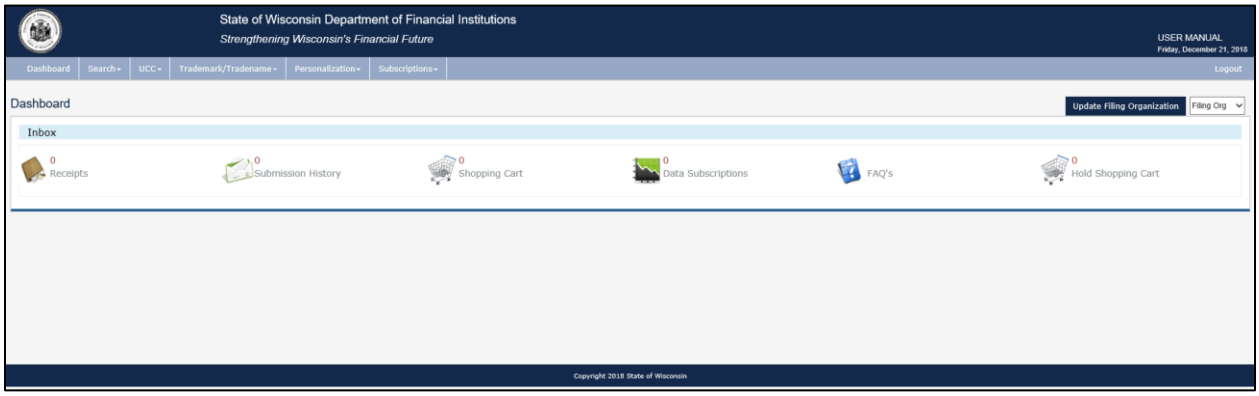
button.

   The system saves the new user and sends an email to the new user with their log in details.

4 Navigation

4.1 Dashboard

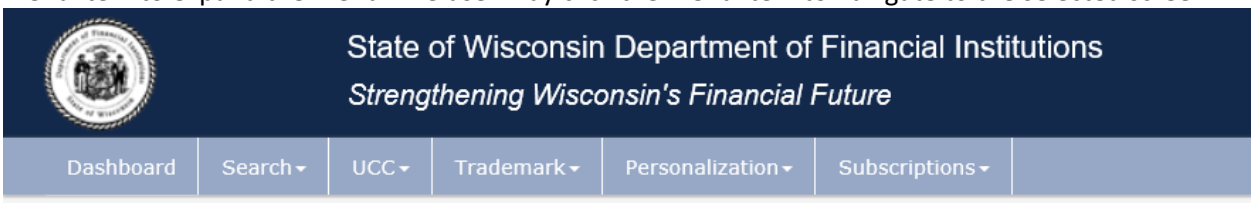
The Dashboard is the first screen that users see upon logging into the system. The user may navigate from this screen to any subsequent screen via the header menus. The Dashboard also displays selected statistics at a glance. The user may click the title for any of the dashboard items to view additional details about the selected item.



4.2 Menus and Navigation

4.2.1 Menus

The Header Menus are displayed on every screen in the WDFI Filing System. The user can hover over a menu item to expand the menu. The user may click the menu item to navigate to the selected screen.



Menu	Sub-Menus
Dashboard	
Search	Trademark Search UCC-11 Debtor Quick Search
UCC	UCC Filing
Trademark	Trademark Filing
Personalization	Auto-Fill Maintenance Change Account Information User Creation Change Password Set Up Filing Organization
Subscriptions	Notification Subscriptions Image/Data Subscriptions
Logout	

4.2.2 Breadcrumbs

The user may use the system's breadcrumbs function to understand their progress in a particular filing.

The user can use the Back button to return to a previous page in the filing.

NOTE: Do not use the internet browser's Back button to attempt to return to a previous screen.

4.2.3 Pagination Controls

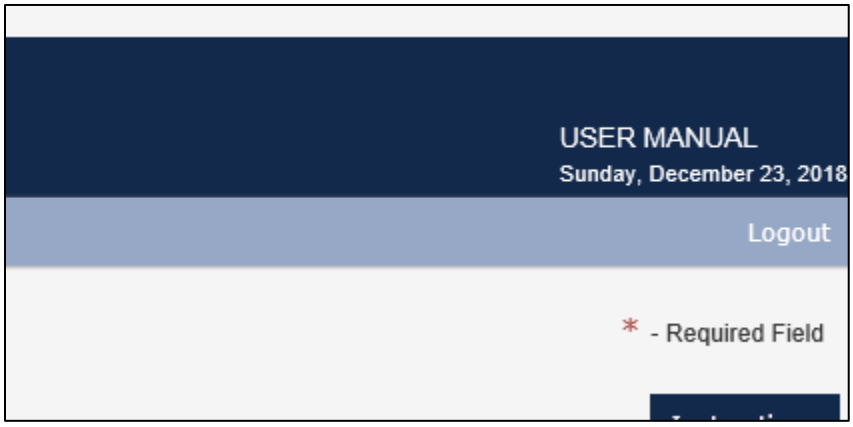
The system may display information like search results, work queue items, or filing history in a data grid consisting of lists of records spanning multiple pages. The current page is shown shaded brown.

The pagination control allows the user to navigate the data grid in the following ways:

- Click the page number to navigate to a specific page in the data grid.
- Click the < Previous button to navigate to the previous page in the data grid.
- Click the Next > button to navigate to the next page in the data grid.
- Click the ... button to show the next 5 pages in the pagination control.
- Enter a page number in the gray field and click the Go to Page button to go to a specific page in the data grid.

4.3 Session Timeout

The system will prompt the user to confirm that they wish to remain logged in if they are inactive for 15 minutes. The user will be logged out of the system automatically if they do not respond to the prompt within 30 seconds.

4.4 Logging Out

The user can click the Logout menu item on the right side of the header menu to log out of the system.