

# MANAGING YOUR ACCESS TO THE OBIE DIRECTORY

## How To Guide

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## 1. INTRODUCTION

### Overview

This purpose of this guide is to help individuals manage their access on the OBIE Directory.

The guide is structured into these sections:

- Signing up:
  - How to sign up for the first time as a new user following a successful submission of an enrolment request or an add individual request
- Logging in:
  - How to log into the OBIE Directory
  - How to resolve common issues with logging in
- Your passphrase:
  - How to set up your passphrase for the first time
- Changing your Login Details / Passphrase:
  - How to change your email address, your password, your PingID app on your mobile phone, and your passphrase

## 2. SIGNING UP

For users who are new to the OBIE Directory, you are required to sign up to gain access. Signing up will be done in one of two ways:

- As a new user on the OBIE Directory, submitting an enrolment form for a new entity
  - Please refer to the How To Guide - Enrolling onto the OBIE Directory in the OBIE Developer Zone (<https://openbanking.atlassian.net/wiki/spaces/DZ/overview>) for more details about how this process works
  - Once you have already submitted at least one enrolment request, then you have signed up regardless of the current status of that enrolment request – there is no need to sign up again
- As a new user on the OBIE Directory, being added to a contact role (e.g. Secondary Business Contact) for a given entity either through an Enrolment request or an Add Individual request
  - Please read the rest of this section for what to do

For users who have already successfully completed sign up, then please skip this section.

### Signing up checklist

- Please use a modern browser on your desktop – not on a tablet or a mobile device – for the best experience
- For your mobile phone:
  - Your mobile should be running either the Android or the Apple operating system
  - Your mobile phone will need to have good signal during the sign up process and you will need to be able to install the PingID app on your phone
- Before attempting to sign up, please wait until you have received the “Open Banking - Set Up Your Account Credentials” email. This will contain your unique sign up link
  - This email will only be sent to you once the Enrolment or Add Individual request has been successfully processed by the OBIE Service Desk
  - If you have not yet received your sign up email please check with the person who submitted the request on the status of the request and, if appropriate, in the Spam folder of your email. If you still have an issue, please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)

## Step 1: Setting up your password

- Click on the link in your “Open Banking - Set Up Your Account Credentials” email
  - This will then display this page asking you to set your password

## Step 1: Set Password

Before you can log in to Open Banking, you need set a password for your Open Banking account.

You will need to provide your email address. A security code will then be sent to your email address. The security code will be used in order to set up your password. Please ensure you are able to access your email inbox for the next part of the sign up process.

Once your password has been set, you will be sent back to the login page.

**Set Account Password >**

## Step 2: Login

Username / Email Address



Password



**Log in >**

*Figure 2.1 – Setting Your Password Page*

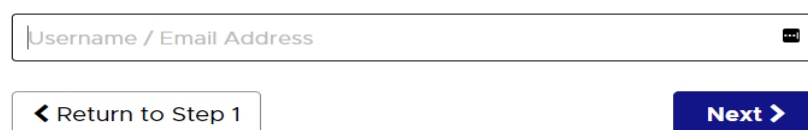
- Click on the Set Account Password button
  - This will then display the Set Password page

## Set Password (1 of 3)

In order to set your Open Banking Account password, please provide your email address.

A security code will then be sent to your email address.

Please check your email inbox for this code as it will be required for Step 2.



Username / Email Address

Return to Step 1 Next

Figure 2.2 – Enter Your Email Address Page

- In the Username field, enter your email address. This will need to be what was supplied in the Enrolment or the Add Individual request by the submitter. Then click on the Next button
  - This will then display the next page asking you to validate your email address with a security code
  - Your email address specified above will be sent a security code from PingID

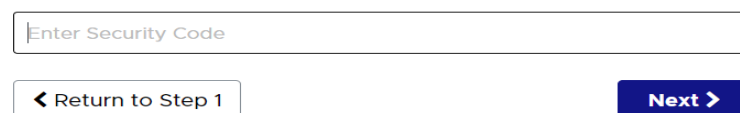
## Set Password (2 of 3)

A security code has been sent to the email address you provided on the previous screen and should arrive with you shortly.

Note that the security code is only valid for ten minutes. After ten minutes, you will need to go back and request a new code.

Please enter the security code exactly as it appears into the field below and click "Next".

You can cancel this process at any time and return to the login screen, your account will not be modified.



Enter Security Code

Return to Step 1 Next

Figure 2.3 – Enter Security Code Page

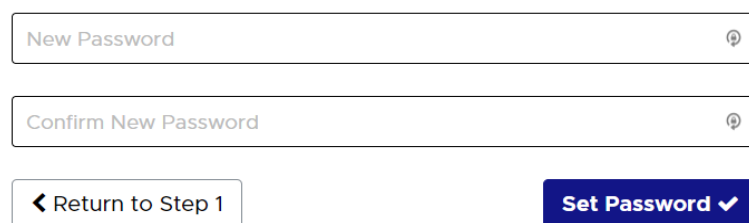
- In the Security Code field, enter the code that was sent to your email address. If you are copying and pasting in the code be sure to check that you have not pasted in any additional spaces at the end of the code. Then click on the Next button
  - This will then display the next page asking you to set a new password

## Set Password (3 of 3)

Your security code has been accepted.

Please enter your password twice and click "Set Password".

Passwords must have at least eight characters, and must contain at least one digit, one symbol, and a mixture of upper and lower case characters.



New Password

Confirm New Password

Return to Step 1

Set Password ✓

Figure 2.4 – Set Password Page

- In the New Password field enter the password that you would like to use. In the Confirm New Password field re-enter the password you would like to use exactly
  - Your password must be between 8 and 64 characters in length
  - Your password must have at least one digit, one symbol, and a mixture of upper and lower case letters
  - The Open Banking Implementation Entity (OBIE) recommends that you do not re-use passwords and avoid using passwords that are predictable or easy to guess
- Then click on the Set Password button
  - This will then display the next page confirming that your new password is now set

## Set Password

Your password has been set. You may now use your new password to login to you Open Banking account.

[Continue to login >](#)

*Figure 2.5 – New Password Confirmed Page*

- Click on the Continue to login button
  - This will then return you to the earlier screen where you can now do Step 2 and log in



## Step 2: Logging in

### Step 1: Set Password


Before you can log in to Open Banking, you need set a password for your Open Banking account.

You will need to provide your email address. A security code will then be sent to your email address. The security code will be used in order to set up your password. Please ensure you are able to access your email inbox for the next part of the sign up process.

Once your password has been set, you will be sent back to the login page.

[Set Account Password >](#)

### Step 2: Login

Username / Email Address 

Password 

[Log in >](#)

Figure 2.6 – Log In Page

- In the Step 2: Login section, enter your email address and the password that you've just set up. Then click on the Log In button
  - This will then display the next page asking you to install the PingID app on your mobile phone

## Step 3: Setting up PingID on your mobile phone

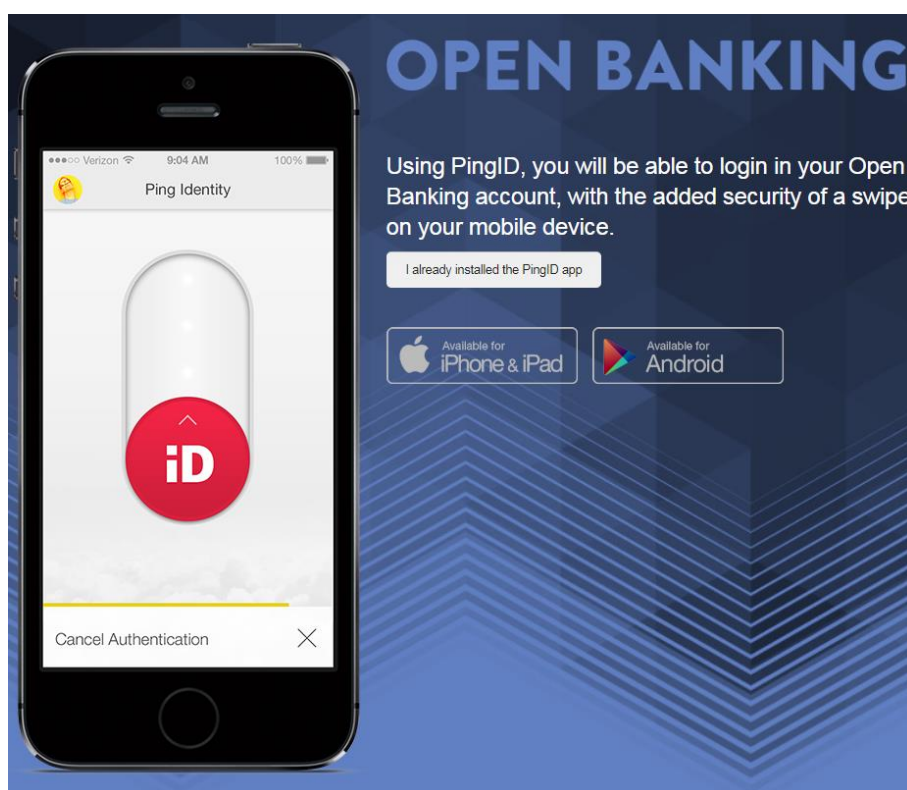
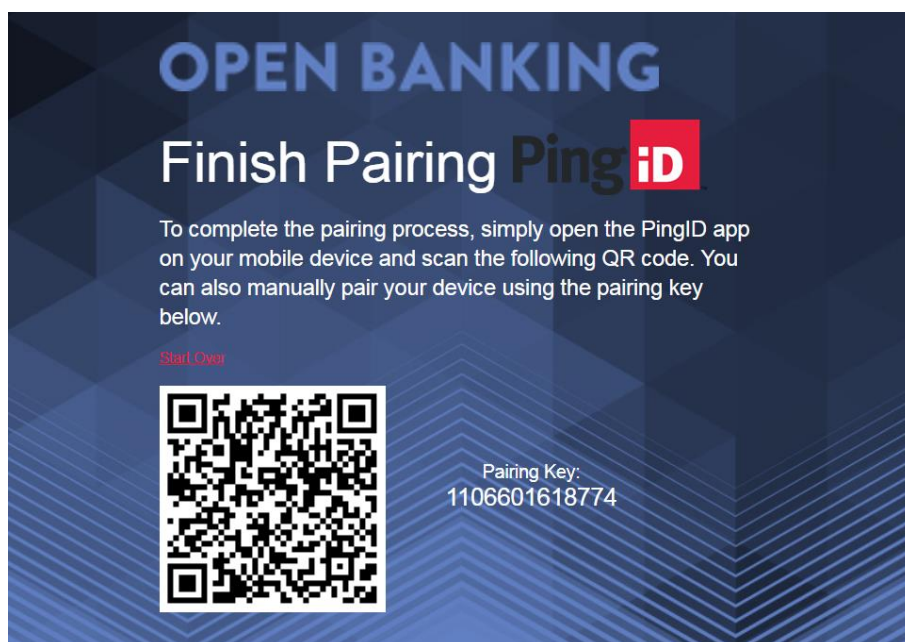


Figure 2.7 – Install PingID Page

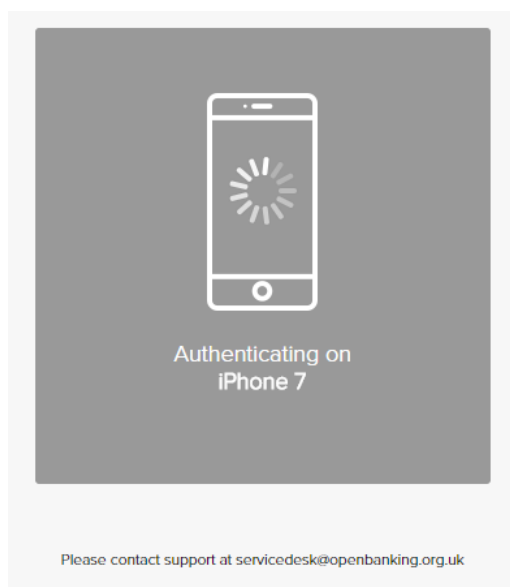
- Install and set up the PingID app on your mobile phone either through the Apple App Store or through the Google Play Store – depending on your mobile phone's operating system
- Once installed successfully (or if you already have the PingID app installed), click on the “I already installed the PingID app” button
  - This will then display the pairing page for you to connect your mobile phone with your account



*Figure 2.8 – Finish Pairing Page*

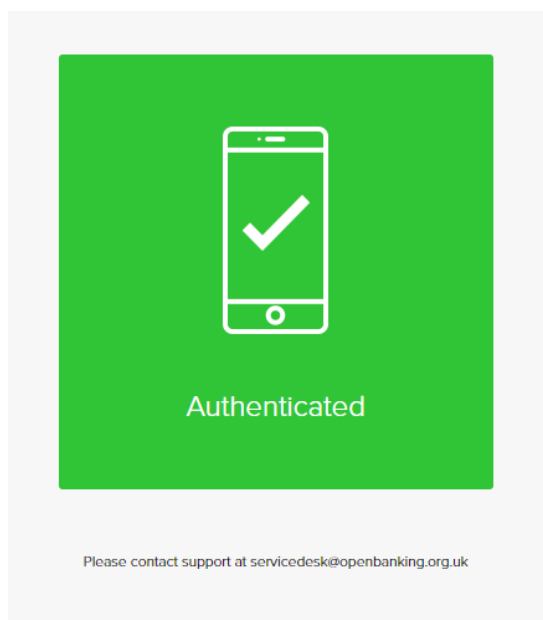
- Follow the instructions on screen to pair with your mobile phone. Please do not close your browser
- Once paired, your mobile phone will show a success message and will ask you to provide a nickname for your PingID profile. On your mobile phone, enter a nickname and click on the Done button

- On your browser, the page will refresh automatically and will ask you to authenticate using the PingID app installed on your mobile phone



*Figure 2.9 – Requesting Authentication Page*

- On your mobile phone, authenticate using the PingID app
  - This will then display a successful authentication page (as in the screenshot below) before displaying the OBIE Directory landing page



*Figure 2.10 – Authentication Successful Page*

## **Step 4: Setting up your passphrase**

After logging in with your email address and password as well as authenticating with PingID on your mobile phone, you will be prompted to set your passphrase on this screen

For conciseness, please refer to Section 4 of this document on how to complete this step.

## 3. LOGGING IN

Once you have successfully completed sign up as a new user, you will then be able to log in by following the steps in Task 1 below.

### Common tasks

- To log into the OBIE Directory
  - Please follow the steps in Task 1 below
- To change any of your login details
  - Please go to Section 5
- To resolve any of your forgotten / lost login details:
  - Forgot Password: Please follow the steps in Task 2 below
  - Lost Mobile Phone: If you no longer have access to the mobile phone that you paired to your account through the PingID app, then please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)
  - Removed PingID app: If you have reset your phone or have deleted the PingID app, then please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)
- To obtain further assistance because you still cannot log in, please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)

### Logging in checklist

- Please use a modern browser on your desktop – not on a tablet or a mobile device – for the best experience
- You will need to have your mobile phone that you paired to your account through the PingID app

### Task 1: Logging in

- Open your browser and navigate to this page on the OBIE website:
  - <https://www.openbanking.org.uk/directory/>
- Click on the Enrol button
  - This will then display the OBIE Directory home page
- On the OBIE Directory home page, click on the Login button
  - This will display the Login page for you to enter your email address and password

### Log in

You will need to authenticate yourself at the next step via the PingID app, so please have this ready before you log in.

Log in >

Not yet registered? [Sign up now](#)

[Change Password](#) | [Forgot Password](#)

Figure 3.1 – Login Page

- In the fields, enter your email address and your password. Then click on the Log In button
  - This will then display the next page asking you to authenticate through the PingID on the mobile phone that you paired with your account
- On your browser, the page will refresh automatically and will ask you to authenticate using the PingID app installed on your mobile phone

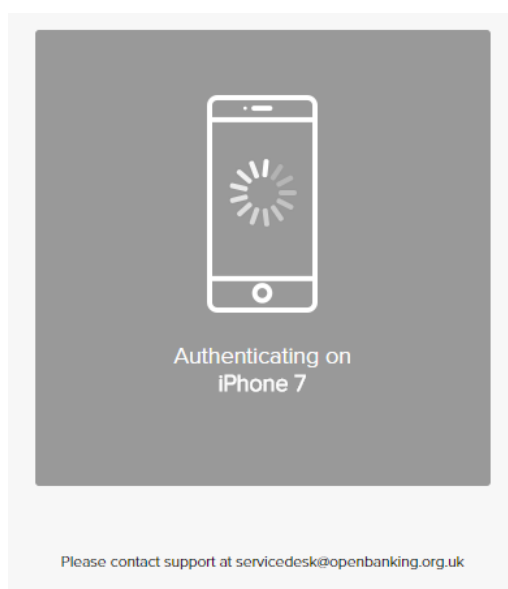


Figure 3.2 – Requesting Authentication Page

- On your mobile phone, authenticate using the PingID app
  - This will then display a successful authentication page (as in the screenshot below) before displaying the OBIE Directory home page

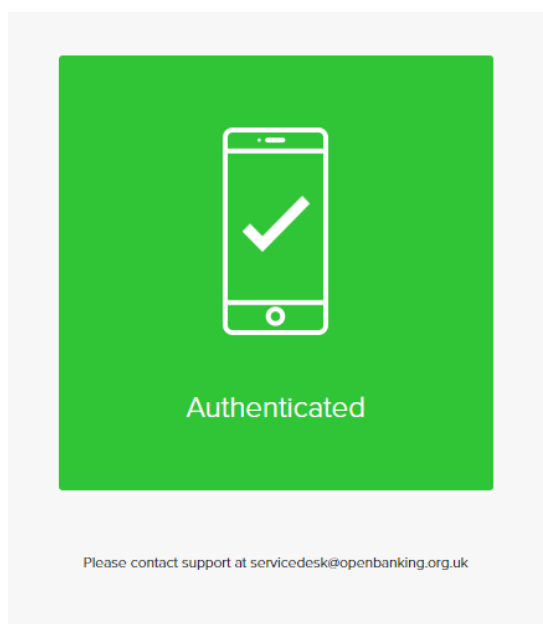


Figure 3.3 – Authentication Successful Page

## Task 2: Forgot password

- Open your browser and navigate to this page on the OBIE website:
  - <https://www.openbanking.org.uk/directory/>
- Click on the Enrol button
  - This will then display the OBIE Directory home page
- On the OBIE Directory home page, click on the Login button
  - This will display the Login page



## Log in

You will need to authenticate yourself at the next step via the PingID app, so please have this ready before you log in.

Log in >

Not yet registered? [Sign up now](#)

[Change Password](#) | [Forgot Password](#)

Figure 3.4 – Login Page

- Click on the Forgot Password link
  - This will then display the Account Recovery page

## Account Recovery

In order to reset your password, a verification code will be sent to the associated Email Address.

Please enter your Open Banking Account Email Address below and click "Next".

You can cancel this process at any time and return to the Log In screen, your account will not be modified.

[Cancel and Return to Log In](#) [Next >](#)

Figure 3.5 – Account Recovery Page

- Enter your email address and click on the Next button
  - This will then display the next page asking you to validate account recovery with a security code
  - Your email address specified above will be sent a security code from PingID

## Account Recovery

A verification code has been sent to the Email Address you specified on the previous screen and should arrive with you shortly.

Please enter the security code exactly as it appears into the field below and click "Next".

If you don't receive the code within a few minutes, please try again. Always use the most recently sent code.

You can cancel this process at any time and return to the Log In screen, your account will not be modified.

◀ Cancel and Return to Log In
Next ▶

Figure 3.5 – Enter Security Code Page

- In the Security Code field, enter the code that was sent to your email address. If you are copying and pasting in the code be sure to check that you have not pasted in any additional spaces at the end of the code. Then click on the Next button
  - This will then display the OBIE Directory home page with a confirmation message advising that your passphrase has been successfully set

## Account Recovery

Your verification code has been accepted. You may now reset your password.

Please enter your new password twice below, and click "Save my new Password" to confirm the change.

You can of course cancel at this point and your account will remain unmodified.

◀ Cancel and Return to Log In
Set new Password ✓

Figure 3.6 – Set Password Page

- In the New Password field enter the password that you would like to use. In the Confirm New Password field re-enter the password you would like to use exactly

- Your password must be between 8 and 64 characters in length
- Your password must have at least one digit, one symbol, and a mixture of upper and lower case letters
- The OBIE recommends that you do not re-use passwords and avoid using passwords that are predictable or easy to guess
- Then click on the Set New Password button
  - This will then display the next page confirming that your new password is now set

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## Account Recovery

Your password has been set. You may now use your new password to Log In to Open Banking.

[Continue to Log In >](#)

*Figure 3.7 – Account Recovery Successful Page*

- Click on the Continue to Log In button
  - This will then return you to the Log In where you will now be able to log in with your new password

## 4. YOUR PASSPHRASE

You will be required to specify your secret passphrase so that the OBIE Service Desk can validate your identity if you call in to perform a limited set of activities on your behalf in case of emergency.

If you have not yet set your passphrase, you will be required to do so. Please follow the steps below.

### Setting up your passphrase

After logging in with your email address and password as well as authenticating with PingID on your mobile phone, you will be prompted to set your passphrase on this screen.

**Setup Passphrase**

Before accessing the Open Banking Directory, you are required to set your passphrase which you should keep secret. This passphrase may be used to validate your identity if you call into the Service Desk. Your passphrase will need to:

- Be between 8 and 20 characters long
- Only contain letters or numbers

Please note that your passphrase is case sensitive. Also, your passphrase will never be displayed - so please ensure that you remember what you set it to.

For more information about setting and using your passphrase, please refer to the [How To Guide - Managing Your Access To The Open Banking Directory](#).

Passphrase \*

Next

Figure 4.1 – Setting Your Passphrase Page

- Enter your passphrase into the field before clicking on the Next button:
  - Your passphrase should be between 8 and 20 characters long and should only contain letters and/or numbers

- Your passphrase is case sensitive
- Your passphrase will never be displayed so please ensure that you remember what you set it to and that you keep it secret

## Setup Passphrase

Your new passphrase has been set.

---

Close

*Figure 4.2 – Passphrase Setup Confirmation Page*

- If your specified passphrase is valid, on submission, you will see the confirmation message above
- Click on the Close button and you will be taken to the OBIE Directory landing page

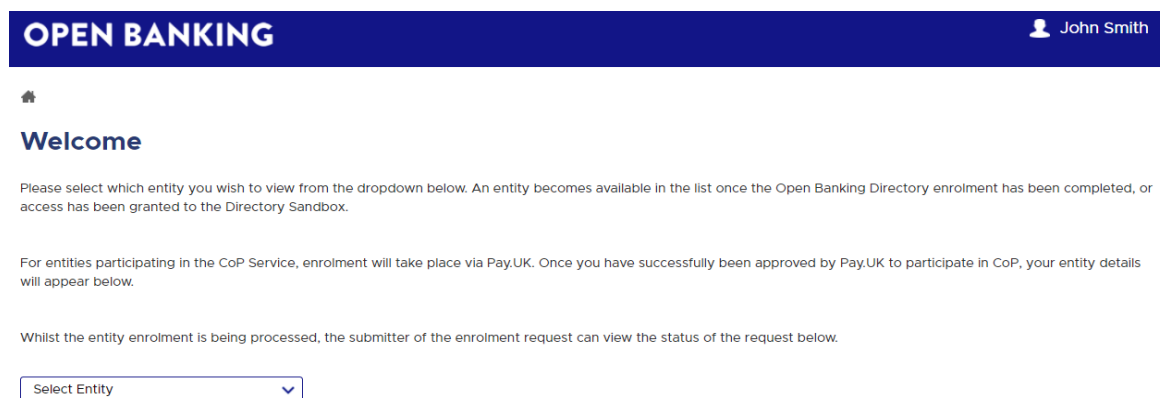
## 5. CHANGING YOUR LOGIN DETAILS/PASSPHRASE

### Common tasks

- To change your email address:
  - Please follow the steps in Task 1 below
- To change your password:
  - Please use the process for Forgot Password as detailed in Task 2 in Section 3
- To move the PingID pairing from your existing mobile phone to a new mobile phone if you still have your existing mobile phone
  - Please follow the steps in Task 2 below
- To move the PingID pairing from your existing mobile phone to a new mobile phone if you no longer have your existing mobile phone
  - Please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)
- To change your passphrase
  - Please follow the steps in Task 3 below

### Task 1: Changing your email address

- Follow the steps in Task 1 in Section 3 to log in and access the OBIE Directory home page



**OPEN BANKING** John Smith

Welcome

Please select which entity you wish to view from the dropdown below. An entity becomes available in the list once the Open Banking Directory enrolment has been completed, or access has been granted to the Directory Sandbox.

For entities participating in the CoP Service, enrolment will take place via Pay.UK. Once you have successfully been approved by Pay.UK to participate in CoP, your entity details will appear below.

Whilst the entity enrolment is being processed, the submitter of the enrolment request can view the status of the request below.

Select Entity ▼

Figure 5.1 – OBIE Directory Home Page

- Select any entity from the dropdown list
  - This will then display the landing page for the selected entity

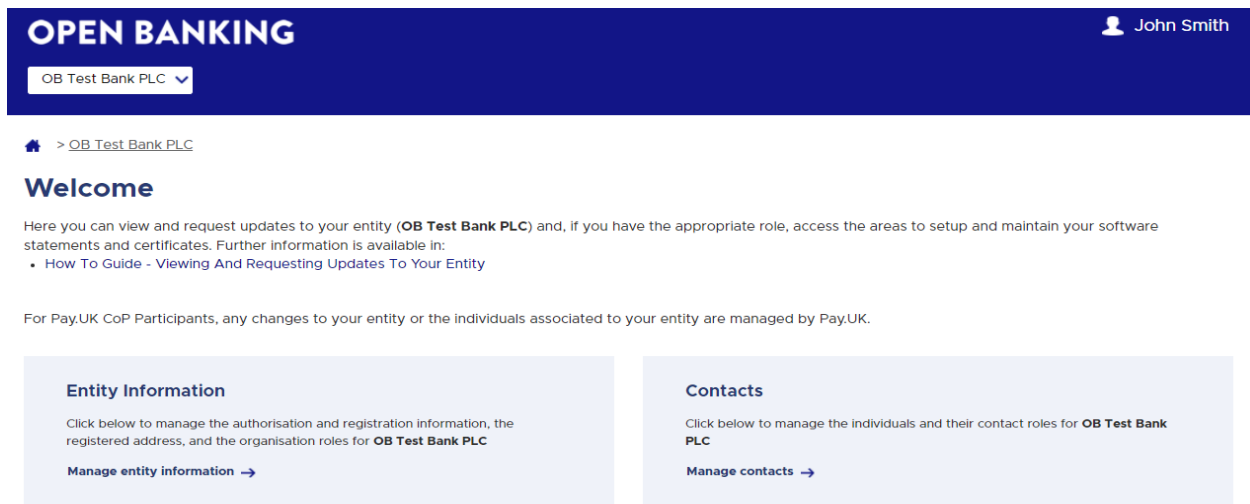


Figure 5.2 – Entity Landing Page

- Click on the Manage Contact button
  - This will then display the Manage Contacts page for the selected entity

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OB Test Bank PLC

John Smith

> OB Test Bank PLC > Manage Contacts

## Contacts

Listed below are all individuals with active contact roles (i.e. PBC / PTC / SBC / STC) associated with your entity that you have permission to view. Depending on your permissions:

- Only Primary Business Contacts and Primary Technical Contacts can request the removal of an existing contact role from an individual.
- The individual in the last active Primary Business Contact and/or Primary Technical Contact roles cannot be removed. Please add other individuals to these contact roles first in order to remove them.
- You are not able to remove yourself from any active contact role. Another Primary Business Contact or Primary Technical Contact will need to do this for you.

**Environment Access**

- This is only relevant for PTCs and STCs as it denotes the environment(s) that they can create / maintain software statements or certificates.
- All active PTCs and STCs always have access to the Directory Sandbox environment across roles. The only way to remove access to the Directory Sandbox environment is to remove the individual as a PTC / STC from the entity.
- If your entity has at least one role in the Directory environment, then all active PTCs will automatically have access to both environments. They can also grant / remove Directory environment access per STC.

**Pay.UK Participants**

You can remove individuals associated with your entity, and grant/remove production access for STCs. All other actions must be done by contacting Pay.UK.

PSD2

Search - minimum 3 characters

+ Add Contact

Name	Role	Job Title	Email	Mobile	Environments	Effective Date	Actions
Sarah Jane	Primary Business	Product Owner	sarahjane@obtestbank.com	+447111111112		05/24/2021, 12:00	
John Smith	Primary Business	Analyst	johnsmith@obtestbank.com	+447111111111		05/24/2021, 15:09	
John Smith	Primary Technical	Analyst	johnsmith@obtestbank.com	+447111111111	Directory Sandbox Only	05/24/2021, 15:09	

Figure 5.3 – Manage Contacts Page

- In the list of active contacts, find the line item for yourself and click on the menu icon in the Actions column
  - This will then display a drop-down menu. Click on the Change Details option
  - This will then display the Request To Change Individual Details form



## Request To Change Individual Details

their relevant documentation (i.e. photo identification / proof of address) to be used for identification and verification before submitting this request.

Changes to the details of the selected individual may require the selected individual to complete and pass identification and verification again.

Therefore, please ensure that the selected individual has updated their relevant documentation (i.e. photo identification / proof of address) to be used for identification and verification before submitting this request.

If you are not the selected individual, please check with them prior to submission as the details will be changed across all entities with whom they have an active role e.g. Primary Business Contact.

Where there is no change to a specific detail then leave as-is.

Note: Fields denoted by an asterisk are mandatory.

### Individual Details


Please enter a name, including any middle names, which **MUST** exactly match the name as it appears on the relevant identification document e.g. passport or drivers licence


First Name\*

Middle Name

Last Name\*

Job Title\*

Email\* 

Mobile Phone\* 

### Declaration

1. I am authorised to make this application on behalf of the entity and/or individuals named on this form.
2. I confirm that the information on this form is accurate and complete.
3. I authorise Open Banking Limited to make enquiries to verify the information given on this form.
4. I confirm that I understand how Open Banking Limited will use personal data in the provision of the Open Banking Directory service as described in the [Open Banking Privacy Policy](#)

☐ Agree to declaration\*  
No

Figure 5.4 – Change Individual Details Form

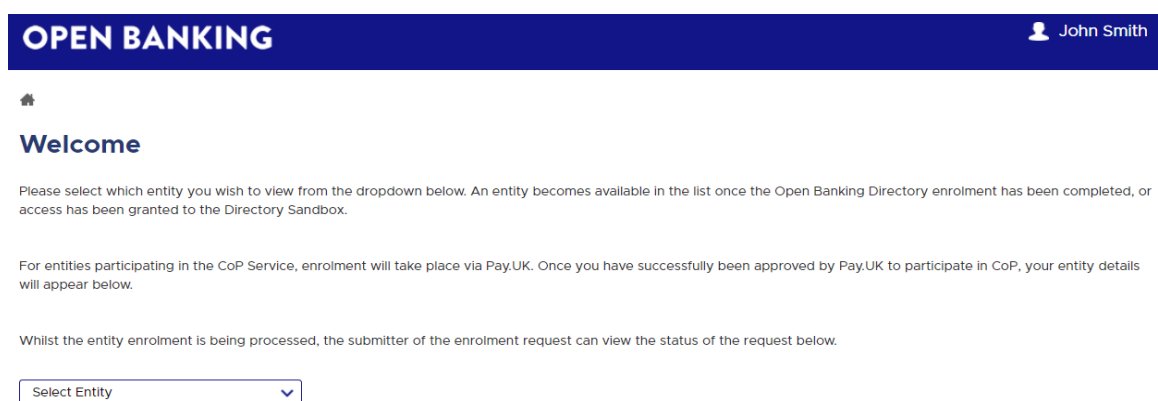
- Update your email to your new email address. Then click to agree to the declaration before clicking on the Submit Request button
  - This will then return you to the Manage Contacts page with a message confirming that your request has been submitted
  - You will also be sent an email acknowledgement of your request
  - Once your Change Individual Details request has been successfully processed you will receive a subsequent email advising when you can start using your new email address

## Task 2: Moving the PingID pairing from your existing mobile phone to a new mobile phone.

- Check that you still have access to your existing mobile phone
  - If not, please contact the OBIE Service Desk on [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk)
- If you do, please raise a ticket using the self-serve on JIRA Service Desk on:
  - <https://openbanking.atlassian.net/servicedesk/customer/portal/1>

## Task 3: Changing your passphrase

- Follow the steps in Task 1 in Section 3 to log in and access the OBIE Directory landing page



**OPEN BANKING** John Smith

🏠

### Welcome

Please select which entity you wish to view from the dropdown below. An entity becomes available in the list once the Open Banking Directory enrolment has been completed, or access has been granted to the Directory Sandbox.

For entities participating in the CoP Service, enrolment will take place via Pay.UK. Once you have successfully been approved by Pay.UK to participate in CoP, your entity details will appear below.

Whilst the entity enrolment is being processed, the submitter of the enrolment request can view the status of the request below.

Select Entity ▼

Figure 5.6 – OBIE Directory Home Page

- Click on your name in the top-left hand corner
  - This will then display the Your Details dialog box

## Your details

**First Name**

John

**Last Name**

Smith

**Job Title**

Analyst

**Email**

johnsmith@obtestbank.com

**Mobile Phone**

+44711111111

**Previous Login**

24 May 2021

Log out

## Change password

To change your password, simply log out and on the Log In page, click on the Change Password link at the bottom of the page.

## Change passphrase

To change your passphrase, please enter your new passphrase below. It will need to be:

- Between 8 and 20 characters long
- Only contain letters or numbers

Please note that your passphrase is case sensitive. Also, your passphrase will never be displayed - so please ensure that you remember what you set it to.



Update

Figure 5.7 – Your Details Dialog Box

- In the Change Passphrase section, enter your new passphrase and click on the Update button
  - Your passphrase should be between 8 and 20 characters long and should only contain letters and/or numbers
  - Your passphrase is case sensitive

- Your passphrase will never be displayed so please ensure that you remember what you set it to and that you keep it secret
- If your specified passphrase is valid, on submission, you will see a success message on-screen

## Change passphrase

To change your passphrase, please enter your new passphrase below. It will need to be:

- Between 8 and 20 characters long
- Only contain letters or numbers

Please note that your passphrase is case sensitive, Also, your passphrase will never be displayed - so please ensure that you remember what you set it to.



Update

 Your new passphrase has been set.

*Figure 5.8 – Your Details Dialog Box With Success Message*

- If your specified passphrase is valid, on submission, you will see a success message on-screen
  - Click anywhere outside of the dialog box to return to the OBIE Directory landing page

## 6. FURTHER QUESTIONS

If you have any further questions, please email the OBIE Service Desk: [servicedesk@openbanking.org.uk](mailto:servicedesk@openbanking.org.uk).