

# CSA – Customer Self Administration

## Training Course



A Passion to Perform.

**Deutsche Bank**



## Before You Start

Dear Reader,

You have been appointed as CSA Administrator of db-direct internet. This means you can create and maintain Users and their access (Entitlement) rights as well as Authorization rights.

Before you start with setting up your Users and Authorizers, there are a number items you need to consider:

1. When you set up **Users** with **Authorization** rights, you would need to realize if **Joint Authorization** is required. If so, then first you would need to setup Joint Categories ([chapter 3 - Joint Categories](#)).  
If you do not use joint authorization, this step can be skipped.
2. Secondly you need to create **User Roles**. A role determines what actions a user can do in db-direct internet and what functions are accessible, for example view account information, create payments, authorize payments, etc ([chapter 4 - User roles](#)).
3. When you have completed the above steps, you can create the **Users**, assign their role ([chapter 5 - User setup](#)) and setup their password ([chapter 6 - Password Setup](#)).
4. Please note, that the **Authorizers** must generate their authorization key ([chapter 7 - dbdi Authorizer Activation](#))

