

# Migrating to new EBS Workstation

All physical EBS Workstations will be upgraded to a new EBS Workstation application over the course of 2021. You will be informed of the date of the upgrade.

## QUICK CHECKLIST

- ☐ Confirm upgrade date
- ☐ Receive new EBS Keypad
- ☐ Confirm 2FA method (Mobile app, Yubikey, phone)
- ☐ Obtain EBS Workstation guide, training videos, or demo
- ☐ Receive welcome email
- ☐ Activate account (New username, complex password and 2FA)
- ☐ Complete upgrade (New login screen)
- ☐ Connect Keypad via USB (Set switches to new WS mode)
- ☐ Login successfully
- ☐ Set up screen and user preferences

To become familiar with the functionality of new EBS Workstation, please refer to the EBS Workstation Quick Guide ([PDF](#) or [online](#)), watch our [educational videos](#), or reach out to your EBS sales representative to arrange a demo.

### Your existing EBS Keypad will stop working after an upgrade.

A new EBS Keypad is required to work with the new EBS Workstation ([Fig. 1](#)).

**You can use the new EBS Keypad with the existing EBS Workstation prior to upgrade.** To do so, connect the new EBS Keypad to your current EBS Workstation using USB-B or Serial ports and put the dip switches on the back of the Keypad into legacy mode: **switches 1 and 2 – up** ([Fig. 2](#)).

To meet modern security standards after the upgrade, EBS Workstation requires a new username, complex password, and one of three two-factor (2FA) authentication methods. For more information, please refer to the *Getting Started with DUO Security for EBS Applications* document.

**Security key (U2F)** – e.g. Yubikey ([Fig. 3](#)) Universal Second Factor USB Key, inserted into the user's Workstation or new EBS Keypad and tapped when requested. EBS will supply you with a Yubikey, but you can also use your own U2F keys.

**Duo mobile app** – An application on Android or iOS mobile device. You need to download and install DUO app from Google Play or Apple store prior to login.

**Phone call** – A call to a user's registered phone number when prompted to authenticate. The request can be approved by answering the call and pressing any key on the phone's keypad.

*Note: For desk phone registration, users are required to provide telephone numbers to EBS in advance.*

Within two weeks prior to the Workstation upgrade, you will receive a **welcome e-mail requesting activation of their EBS Workstation account**. Activate your account as soon as possible to make sure that you can log in to the system following the upgrade. Activation requires use of PC with Internet access. You must **log out of your old EBS Workstation prior to activation**. You will be able to log in to your old EBS Workstation again after completing account activation.

Click on a link in the activation e-mail to access activation page. A new username typically matches your corporate e-mail address. Secure passwords must be minimum of **10 characters** (with at least one number, one upper case letter, one lower case letter, and one symbol) and must not include any part of the username, first name, or last name of the user.



Figure 1: New EBS Keypad

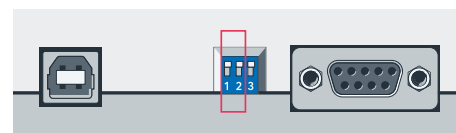


Figure 2: connecting Keypad to old Workstation



Figure 3: Example of U2F Key (Yubikey)

Existing Trader ID will be linked to your new username.

On first time login, you will be prompted to set up a **two-factor authentication (2FA)** (Fig. 4). Subsequently, you will be required to authenticate via a second factor on the following occasions:

- First time login on a new device
- 90 days after the previous second factor authentication on a trusted device
- After clearing all browser cookies
- When attempting to make any changes to 2FA options

After scheduled upgrade, your screen should look like Fig. 5.

#### Your old EBS Keypad will not work.

Ensure that your new EBS Keypad is connected to your EBS Workstation via **USB cable** (not serial) and that dip switches on the back of the Keypad are in New EBS Workstation mode: **switches 1 and 2 – down** (Fig. 6). If the Keypad is not detected, unplug and try plugging the USB cable at the back.

Log in to the application using the username (e-mail address), password, and **2FA** method you set up during activation. If **security key (Yubikey)** is the selected 2FA method, you may use the dedicated USB-A port on the back of new EBS Keypad to insert the key and verify your identity (Fig. 7). Regardless of 2FA method, you can choose the "Remember for 90 days" option and not be prompted for 2FA on the same machine every time.

Once the application loads, you will see some default price and information panels (Fig. 8); however, **your old screen layout and setting will not be carried across** and you must set up screen and trading settings. Please refer to the [EBS Workstation Quick Guide](#) for details about how to set up your screen.

You may increase the number of panels which fit the screen or increase the size of price panels and font size by adjusting the application **zoom**.

Press **F9 key** on a normal keyboard. This opens the advanced menu at the top of the screen. Select **view** (Fig. 9) and use a mouse to adjust zoom. Once done, press the **F9 Key** again to close the menu.

If you have any questions about the migration process, please contact your EBS Sales representative. If you experience any issues during first login or screen setup, please contact the [EBS Customer Support team](#).



Figure 6: New Workstation Keypad setup



Figure 7: Dedicated USB port for U2F Key (Yubikey)

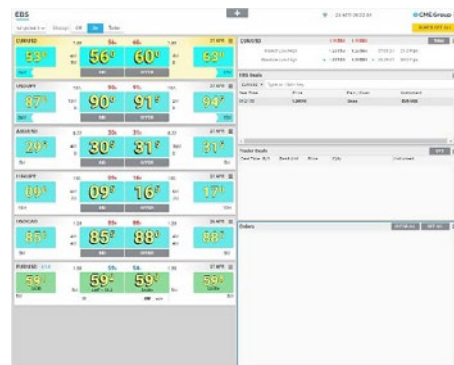


Figure 8: Default view



Figure 4: Choosing 2FA method

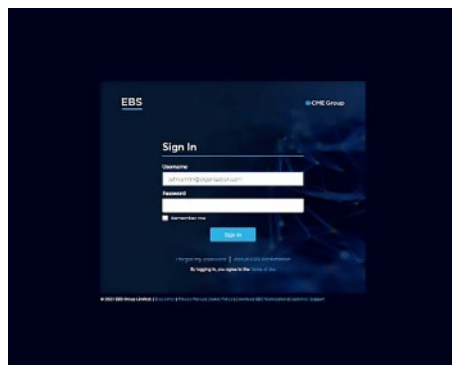


Figure 5: Log on screen

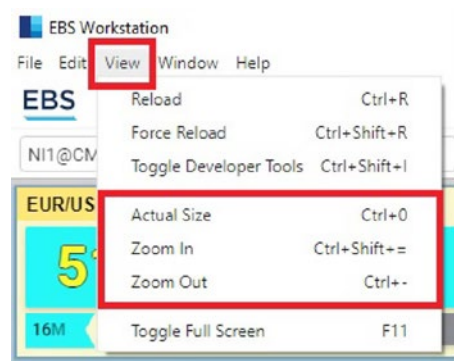


Figure 9: View adjustment

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