

User Administration

Adding Users and Services

To add new Business eBanking users and the services they will use, complete the following:

1. In the Administration tab, click User Administration in the Company Administration section. The User Administration page appears:

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User Administration

To view, edit, copy or delete a user's profile, click the corresponding user ID. To setup a new user, go to [Setup New User](#).

User ID	First Name	Last Name	Additional Information
ADMIN	Dave	Deposits	ADMIN
ADMIN2	Ken	SAVINGS	ADMIN BACK UP
ADMIN3	Diane	Banker	
TRAIN1	Jim	Morgan	backup
TRAIN2	Mary	Cooper	na

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2. Click the Setup New User text link. The Setup New User page appears:

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Setup New User

Enter the new user's information and role(s) below, then click on "Continue".

User Information

User ID:

Password: (Passwords are not case sensitive, are 8 to 12 characters long and must contain at least 1 letter and 1 number.)

Confirm password:

First name:

Last name:

Primary e-mail address:

Secondary e-mail address (optional):

Additional information (optional):

User Roles (optional)

Allow this user to setup templates.
(This entitles the user to template setup capabilities for only those services and accounts to which the user has been entitled.)

Allow this user to approve transactions.
(This entitles the user to transfer capabilities for only those services to which the user has been entitled.)

Grant this user administration privileges.
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)

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3. Complete the fields as required:

<i>Fields</i>	<i>Description</i>
User ID	Enter the ID that the user will use to sign on to Business eBanking.
Password	Enter a starter password.
Confirm Password	Enter the same starter password again.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Primary e-mail	Enter email address of the user
User Roles	Entitles the user to various privileges by checking the appropriate checkbox.

4. Click Continue. The Add User Services page appears:

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Add User Services

Select the services to which the user will have access and click "Save user." To edit the user's profile information, click "Modify user profile."

User Information [Modify user profile](#)

User ID: 999xyz
 First name: Ursula
 Last name: User
 Primary e-mail address: ursula@work.biz
 Secondary e-mail address (optional): No secondary e-mail address on file
 Additional information (optional):
 Roles: Administration, Setup, Approval

Available Services Select all | Deselect all

Service Name	Default
Account Reporting	<input type="checkbox"/>
ACH Collection	<input type="checkbox"/>
ACH File Upload	<input type="checkbox"/>
ACH Payment	<input type="checkbox"/>
Book Transfer	<input type="checkbox"/>
Express Transfer	<input type="checkbox"/>
Federal Tax	<input type="checkbox"/>
File Download	<input type="checkbox"/>
File Upload	<input type="checkbox"/>
Free Form Wire Entry	<input type="checkbox"/>
Loan	<input type="checkbox"/>

5. Select the services that need to be entitled to the user or click the Select All link above the header to select all the services.
6. Click Save User. The User Profile page appears with a confirmation.

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User Profile

The user was created successfully. Before some services can be used, accounts must be assigned to these services that require account-level access. User limits default to the associated company limits but may be changed. To review the approval settings, which may be impacted by this change, go to [Approvals Administration](#). To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

User Information [Modify user profile](#) • [Copy user](#)

User ID: 999XYZ
 First name: Ursula
 Last name: User
 Primary e-mail address: ursula@work.biz
 Secondary e-mail address: No secondary e-mail address on file
 Additional information:
 User status: Enabled
 Roles: Administration, Setup, Approval
[Delete user](#)

Assigned Services [Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	Add
ACH File Upload	
ACH Payment	Add
Book Transfer	Add

7. In the list of Assigned Services, click the Add link for the appropriate service to assign accounts along with functionality to the user. The Add Account Access page appears:

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Add Account Access

Select the accounts to which the user will have access and click "Save changes." To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
 Name: Ursula User
 Service: ACH Payment

Accounts available for the ACH Payment service

TRC	Account Number	Description	Entitled Account Select All • Deselect All	Allow Transfers Select All • Deselect All
841841842	6895122000	CHECKING 1	<input type="checkbox"/>	<input type="checkbox"/>
841841842	6895122001	CHECKING 2	<input type="checkbox"/>	<input type="checkbox"/>
841841842	6895132000	Money Mkt	<input type="checkbox"/>	<input type="checkbox"/>

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8. Select the accounts to which the user will have access and decide what type of capabilities he/she will have using those accounts.

Entitled Account To entitle entry capabilities for all available accounts.

Allow Transmit To entitle transmit capabilities for all available accounts.

9. Click Save Changes. A confirmation message appears:

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Add Account Access

Account access updated successfully.
Select the accounts to which the user will have access and click "Save changes." To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
Name: Ursula User
Service: ACH Payment

Accounts available for the ACH Payment service

TRC	Account Number	Description	Entitled Account Select All * Deselect All	Allow Transmit Select All * Deselect All
841841842	6895122600	CHECKING 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
841841842	6895122001	CHECKING 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
841841842	6895132000	1Money Mkt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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10. Continue to select the services by clicking the User Profile link and assigning additional accounts to services as required.

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User Profile

To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

User Information [Modify user profile](#) * [Copy user](#)

User ID: 999XYZ
First name: Ursula
Last name: User
Primary e-mail address: ursula@work.biz
Secondary e-mail address: No secondary e-mail address on file
Additional information:
User status: Enabled
Roles: Administration, Setup, Approval

[Delete user](#)

Assigned Services [Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	Add
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add
Express Transfer	Add
Federal Tax	Add

Modifying a Users Profile

To change a user's profile information, complete the following:

1. In the Administration tab, click User Administration in the Company Administration section. The User Administration page appears:

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User Administration

To view, edit, copy or delete a user's profile, click the corresponding user ID. To setup a new user, go to [Setup New User](#).

User ID	First Name	Last Name	Additional Information
999XYZ	Ursula	User	
ADMIN1	Dave	Deposits	ADMIN
ADMIN2	Ken	SAVINGS	ADMIN BACK UP
ADMIN30	Diane	Banker	
TRAIN1	Jim	Morgan	backup
TRAINER2	Mary	Cooper	na

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2. Click the User ID of the user to be modified. The User Profile page appears.

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User Profile

To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

[Modify user profile](#) • [Copy user](#)

User Information

User ID: 999XYZ
 First name: Ursula
 Last name: User
 Primary e-mail address: ursula@work.biz
 Secondary e-mail address: No secondary e-mail address on file
 Additional information:
 User status: Enabled
 Roles: Administration, Setup, Approval

[Delete user](#)

Assigned Services

[Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	Add
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add
Express Transfer	Add

3. Click the Modify User Profile link. The Modify User Profile page appears:

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Modify User Profile

Modify the user's profile and click "Save changes." Modifying User Roles could affect the user's access and functionality, including the cancellation of scheduled requests.

To return to the user's profile, go to [User Profile](#).

User Information

User ID:

Password (optional):
(Passwords are not case sensitive, are 8 to 12 characters long and must contain at least 1 letter and 1 number.)

Confirm password (optional):

First name:

Last name:

Primary e-mail address:

Secondary e-mail address (optional):

Additional information (optional):

User Locked (optional):

User Roles (optional)

Allow this user to setup templates.
(This enables the user to template setup capabilities for only those services and accounts to which the user has been entitled.)

Allow this user to approve transactions.
(This enables the user to transmit capabilities for only those services to which the user has been entitled.)

Grant this user administration privileges.
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)

Tip: If the ADMIN user decides to remove the Security Settings, the user's picture, personal phrase, and confirmation questions will be removed. The user will be directed into the Secure Sign On process the next time they sign in.

4. Make the required changes and click Save Changes. The User Profile appears with a confirmation.

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User Profile

The user was updated successfully.
 To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

User information

[Modify user profile](#) • [Copy user](#)

User ID: 999XYZ
 First name: Ursula
 Last name: User
 Primary e-mail address: ursula@work.biz
 Secondary e-mail address: No secondary e-mail address on file
 Additional information:
 User status: Enabled
 Roles: Administration
 Setup
 Approval

[Delete user](#)

Assigned Services

[Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	Add
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add

Modifying a Users Assigned Services

1. From the User Profile, click the Modify User Services link. The Modify User Services page appears:

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Modify User Services

Select the services to which the user will have access and click "Save changes." Changing User Services could affect the user's access and functionality, including the cancellation of scheduled requests.

To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
Name: Ursula User

Available Services Select all Deselect all

Service Name	Enabled
Account Reporting	<input checked="" type="checkbox"/>
ACH Collection	<input checked="" type="checkbox"/>
ACH File Upload	<input checked="" type="checkbox"/>
ACH Payment	<input checked="" type="checkbox"/>
Book Transfer	<input checked="" type="checkbox"/>
Express Transfer	<input checked="" type="checkbox"/>
Federal Tax	<input checked="" type="checkbox"/>
File Download	<input checked="" type="checkbox"/>
File Upload	<input checked="" type="checkbox"/>
Free Form Wire Entry	<input checked="" type="checkbox"/>
Loan	<input checked="" type="checkbox"/>
Loan Advance	<input checked="" type="checkbox"/>
Loan Payment	<input checked="" type="checkbox"/>
Positive Pay	<input checked="" type="checkbox"/>
Reporting	<input checked="" type="checkbox"/>
State Tax	<input checked="" type="checkbox"/>

2. Change services for the user as necessary by checking or unchecking the appropriate checkbox.
3. Click Save Changes. A confirmation appears:

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Modify User Services

The user was updated successfully. Select the services to which the user will have access and click "Save changes." Changing User Services could affect the user's access and functionality, including the cancellation of scheduled requests.

To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
Name: Ursula User

Available Services	Select all • Deselect all
Service Name	Enabled
Account Reporting	<input checked="" type="checkbox"/>
ACH Collection	<input checked="" type="checkbox"/>
ACH File Upload	<input checked="" type="checkbox"/>
ACH Payment	<input checked="" type="checkbox"/>
Book Transfer	<input checked="" type="checkbox"/>
Express Transfer	<input checked="" type="checkbox"/>
Federal Tax	<input checked="" type="checkbox"/>
File Download	<input checked="" type="checkbox"/>
File Upload	<input checked="" type="checkbox"/>
Free Form Wire Entry	<input checked="" type="checkbox"/>
Loan	<input checked="" type="checkbox"/>
Loan Advance	<input checked="" type="checkbox"/>
Loan Payment	<input checked="" type="checkbox"/>
Positive Pay	<input checked="" type="checkbox"/>
Reporting	<input checked="" type="checkbox"/>
State Tax	<input checked="" type="checkbox"/>

4. Click the User Profile link to return to the User Profile page:

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User Profile

To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

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User Information

User ID: 999XYZ
First name: Ursula
Last name: User
Primary e-mail address: ursula@work.biz
Secondary e-mail address: No secondary e-mail address on file
Additional information:
User status: Enabled
Roles: Administration, Setup, Approval
[Delete user](#)

Assigned Services

[Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	Add
ACH File Upload	Add
ACH Payment	View/Change
Book Transfer	Add
Express Transfer	Add

- In the list of Assigned Services, click the Add link for the appropriate service to assign accounts along with functionality to the user. The Add Account Access page appears:

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Add Account Access

Select the accounts to which the user will have access and click "Save changes." To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
 Name: Ursula User
 Service: ACH Collection

Accounts available for the ACH Collection service

TRC	Account Number	Description	Enfiled Account Select All - Deselect All	Allow Transit Select All - Deselect All
841841842	6895122000	CHECKING 1	<input type="checkbox"/>	<input type="checkbox"/>
841841842	6895122001	CHECKING 2	<input type="checkbox"/>	<input type="checkbox"/>
841841842	6895132000	1Money Mkt	<input type="checkbox"/>	<input type="checkbox"/>

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- Select the accounts to which the user will have access and decide what type of capabilities he/she will have using those accounts.
- Click Save Changes. A confirmation message appears:

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Add Account Access

Account access updated successfully.
 Select the accounts to which the user will have access and click "Save changes." To return to the user's profile, go to [User Profile](#).

User ID: 999XYZ
 Name: Ureala User
 Service: ACH Collection

Accounts available for the ACH Collection service

TRC	Account Number	Description	Enroll Account		Allow Transit	
			Select All	Deselect All	Select All	Deselect All
841841842	6895122000	CHECKING 1	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
841841842	6895122001	CHECKING 2	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
841841842	6895132000	IMoney Mkt	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

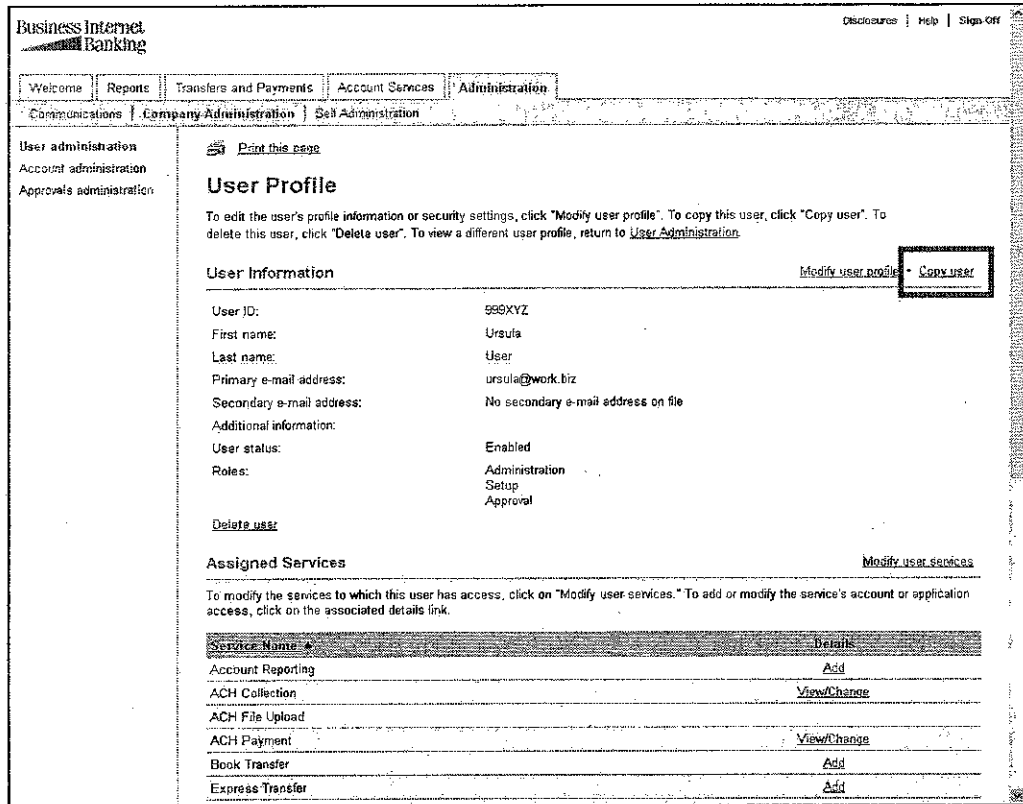
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- Continue to select the services by clicking the User Profile link and assigning additional accounts to services as required.

Copying Users

To Copy a users access, complete the following:

1. Access the User Profile of the user to be copied:



The screenshot shows the Business Internet Banking interface. At the top, there is a navigation bar with links for Welcome, Reports, Transfers and Payments, Account Services, and Administration. Below this, there are sub-navigation links for Communications, Company Administration, and Self Administration. The main content area is titled "User Profile" and contains the following information:

User Information [Modify user profile](#) [Copy user](#)

User ID: 999XYZ
First name: Ursula
Last name: User
Primary e-mail address: ursula@work.biz
Secondary e-mail address: No secondary e-mail address on file
Additional information:
User status: Enabled
Roles: Administration, Setup, Approval

[Delete user](#)

Assigned Services [Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	View/Change
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add
Express Transfer	Add

2. Click the Copy User link. The Copy User page appears:

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Copy User

User ID being copied: 999XYZ

Enter the new user's information and click "Save user." The roles, services and account access from user 999XYZ will be copied to this new user. To return to the original user's profile, go to [User Profile](#)

User Information

User ID:

Password:

(Passwords are not case sensitive, are 8 to 12 characters long and must contain at least 1 letter and 1 number.)

Confirm password:

First name:

Last name:

Primary e-mail address:

Secondary e-mail address (optional):

Additional information (optional):

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3. Enter the information for the new user you are creating. Click Save. A confirmation message appears:

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User Profile

User 999LMN was copied successfully. To review the approval settings, which may be impacted by this change, go to [Approvals Administration](#). To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

User Information [Modify user profile](#) [Copy user](#)

User ID: 999LMN

First name: Eddie

Last name: Employee

Primary e-mail address: eemployee@work.biz

Secondary e-mail address: No secondary e-mail address on file

Additional information:

User status: Enabled

Roles: Administration
Setup
Approval

[Delete user](#)

Assigned Services [Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	View/Change
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add

Tip: If you are restricting access to any services or accounts, be sure to follow the same steps of Changing a User.

Deleting Users

To delete user access, complete the following:

1. Access the User Profile of the user to be deleted:

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User Profile

To edit the user's profile information or security settings, click "Modify user profile". To copy this user, click "Copy user". To delete this user, click "Delete user". To view a different user profile, return to [User Administration](#).

User Information [Modify user profile](#) • [Copy user](#)

User ID: 999LMN
 First name: Eddie
 Last name: Employee
 Primary e-mail address: eemployee@work.biz
 Secondary e-mail address: No secondary e-mail address on file
 Additional information:
 User status: Enabled
 Roles: Administration, Setup, Approval

[Delete user](#)

Assigned Services [Modify user services](#)

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name	Details
Account Reporting	Add
ACH Collection	View/Change
ACH File Upload	
ACH Payment	View/Change
Book Transfer	Add
Express Transfer	Add

2. Click the Delete User link. The Delete User page appears:

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Delete User

You have requested to delete the following user. To continue, click "Delete user." Once deleted, the user cannot be recovered. To return to this user's profile, go to [User Profile](#).

User Information

User ID:	999LMN
First name:	Eddie
Last name:	Employee
Primary e-mail address:	employee@work.biz
Secondary e-mail address:	No secondary e-mail address on file
Additional information:	
User status:	Enabled
Roles:	Administration Setup Approval

Assigned Services

To modify the services to which this user has access, click on "Modify user services." To add or modify the service's account or application access, click on the associated details link.

Service Name
Account Reporting
ACH Collection
ACH File Upload
ACH Payment
Book Transfer
Express Transfer
Federal Tax
File Download

- Review the user. Click the Delete User button at the bottom of the page. The User Administration page reappears and the deleted user is removed from the list of users.

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User Administration

The user was deleted successfully. To review the approval settings, which may be impacted by this change, go to [Approvals Administration](#).
To view, edit, copy or delete a user's profile, click the corresponding user ID. To setup a new user, go to [Setup New User](#).

User ID	First Name	Last Name	Additional Information
SAXYZ	Ursula	User	
ADMIN	Dave	Deposits	ADMIN
ADMIN2	Ken	SAVINGS	ADMIN BACK UP
ADMIN3	Diane	Banker	
TRAIN1	Jim	Morgan	backup
TRAINER2	Mary	Cooper	na

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