Administrator functions

Commercial Online Banking administrators have the authority to add new users, assign access to accounts and functionalities based on the user's role and needs, as well as delete users from the system.

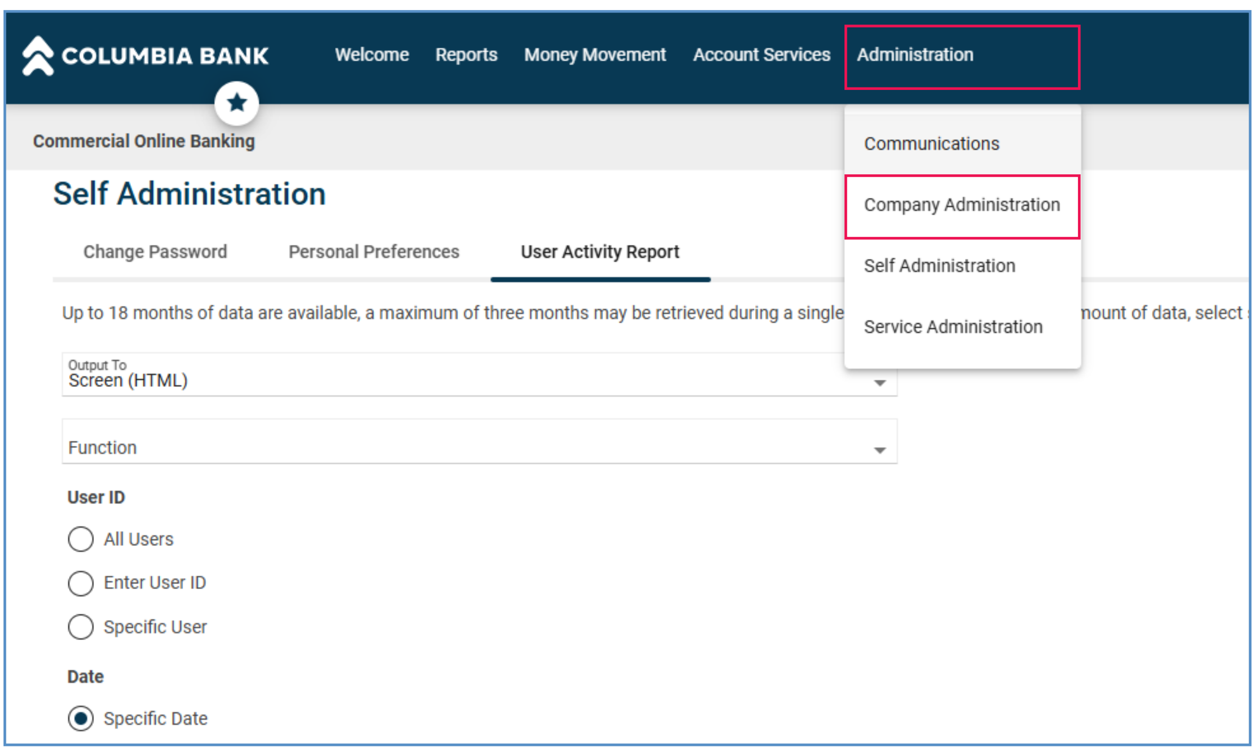
We recommend performing a regular review of your users and their permissions to ensure access levels are still appropriate for each user and that you do not have users in the system who are no longer with the company or who no longer need access.

Adding and editing users

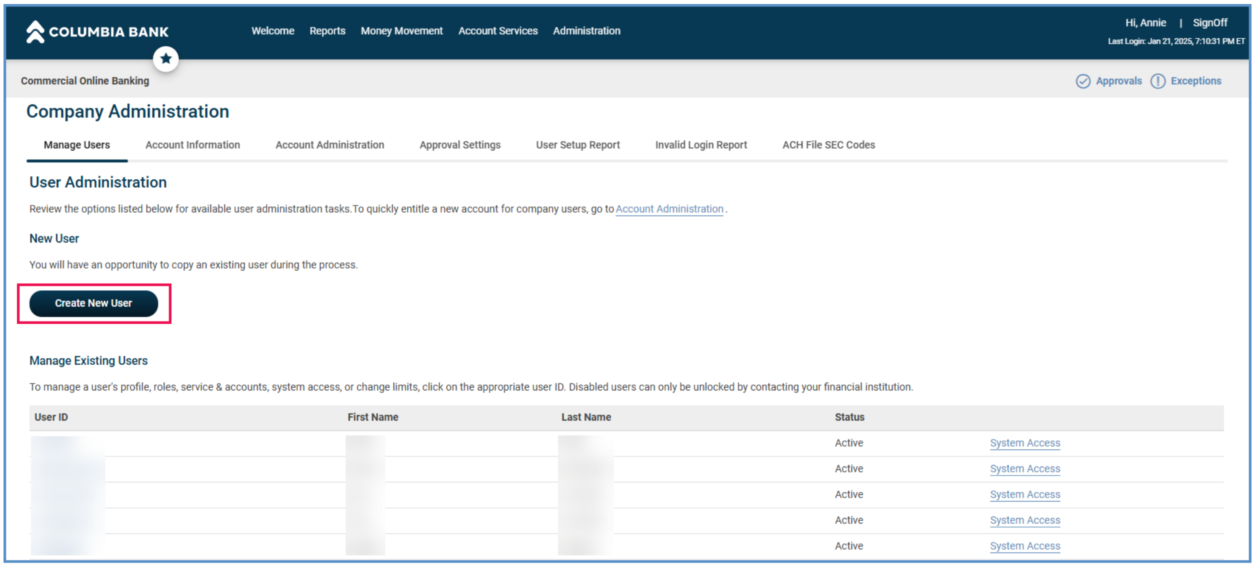
When adding or managing users, we highly recommend you limit user access and permissions to essential functions to help mitigate risks and prevent fraud.

Adding a new user

1. Select **Administration** from the main menu then **Company Administration**. The system will open to the Manage User tab by default.

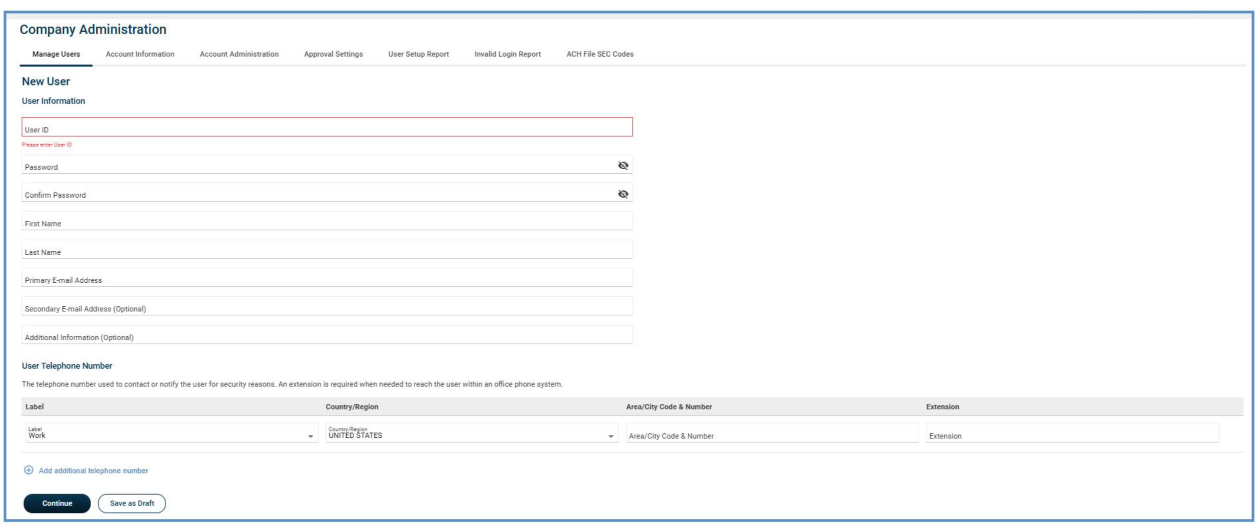


2. Click on the **Create New User** button.

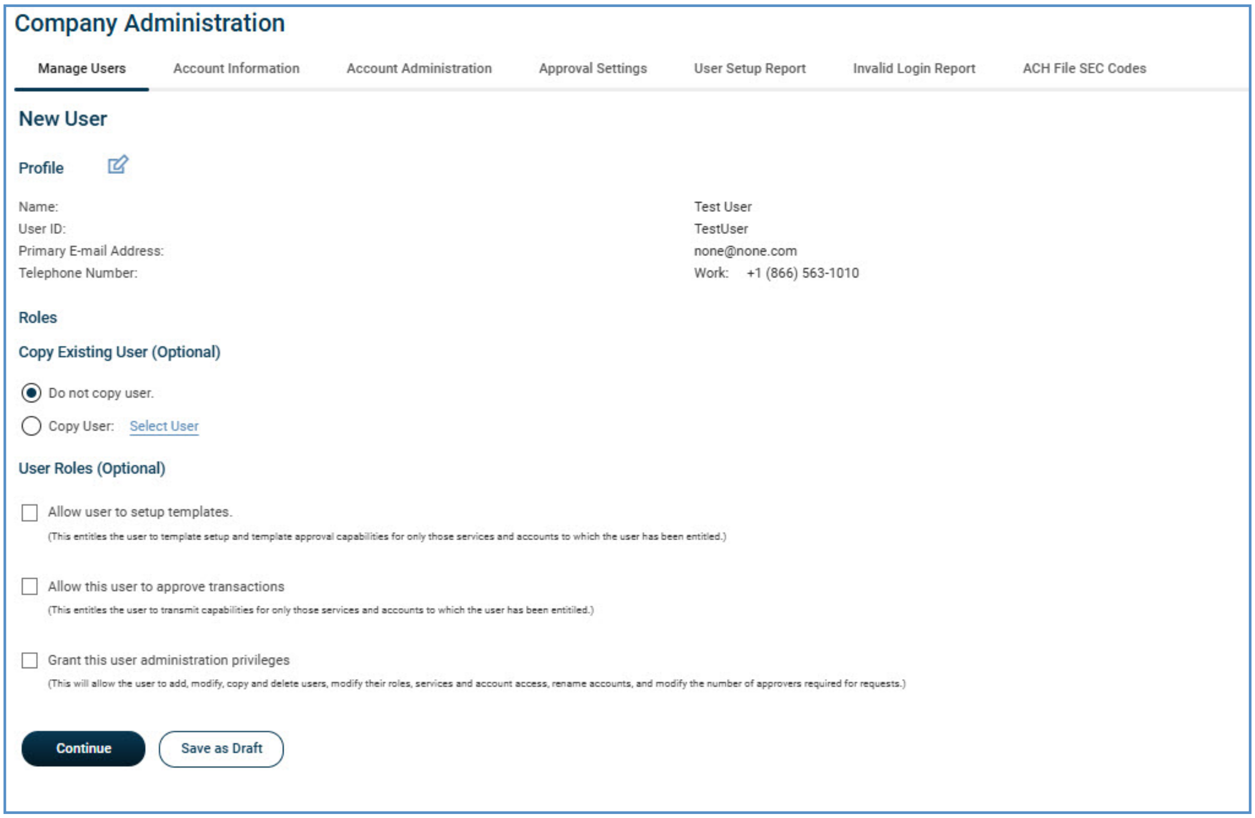


3. Create a unique **User ID** and provide a **temporary password**.

4. Complete all the fields for your new user, including phone number. The mobile phone option provides the ability to receive text notifications for secure access codes.



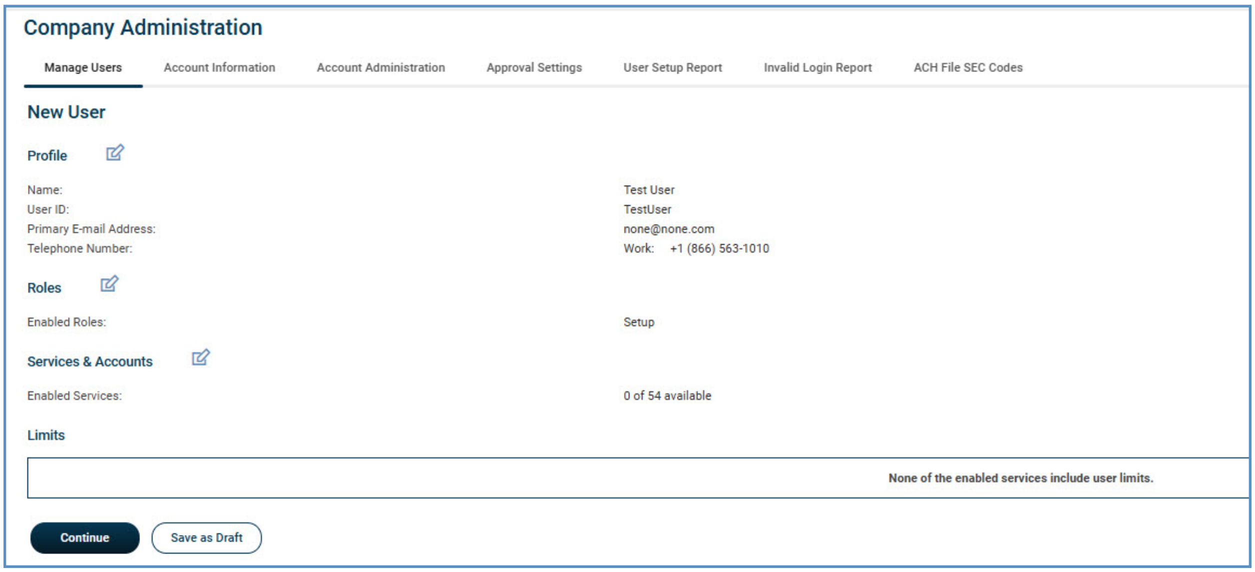
5. Select **Continue**.
6. Choose the role or roles you want your new user to have such as, setting up templates or payments, approving transactions, or user administration.



7. Continue completing the user setup workflow.

   Alternatively, you can copy an existing user's roles and permissions. The system will apply them to the new user. Select the Copy User option, choose the user to be copied, scroll to the bottom of the "Copy Existing User" window and click Copy User, then select Continue.

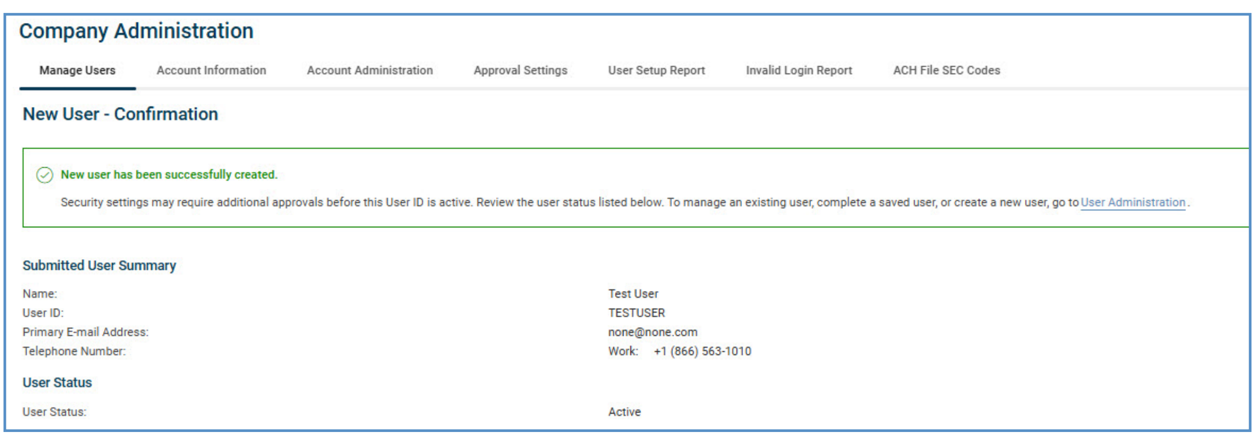
   Make any necessary adjustments to the services and accounts enabled for the copied user then scroll to the bottom and select Continue.



8. Add any appropriate limits for ACH, Bill Pay, and Wire. If this individual will not have limits, simply select **Continue**.

9. Confirm the information entered and select **Create User**.

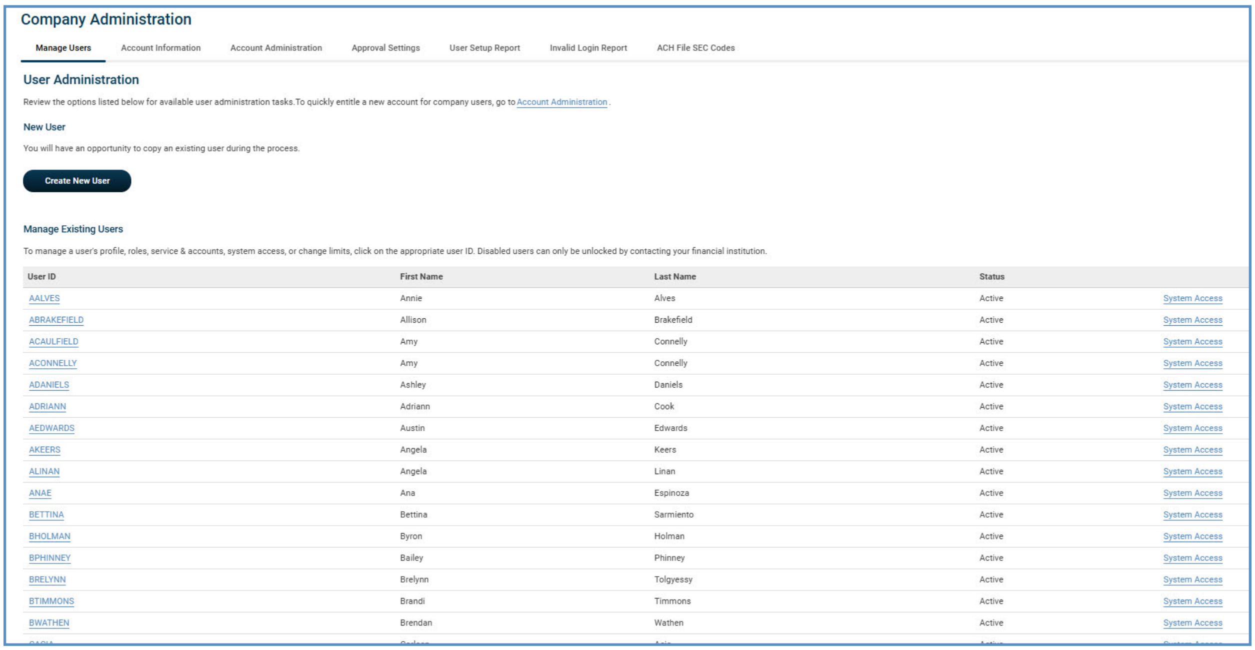
   Alternatively, if you select Save as Draft, the user information will be saved but the user account will not be created, and the user will not be able to log in.



Editing an existing user

You can edit permissions for an existing user from the Company Administration page as well. Follow the steps below.

1. Locate the user and click the **User ID.**



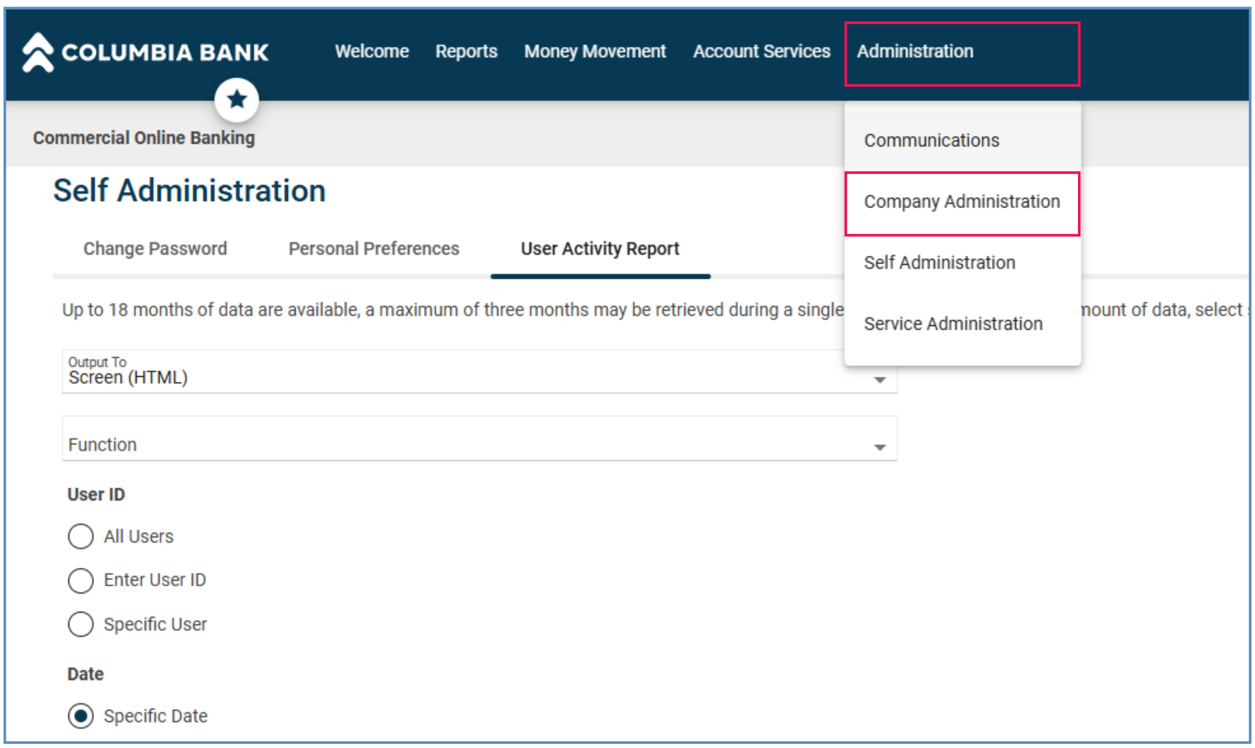
2. Click on the **edit** option to adjust permissions for the user, or you can delete a user by clicking the **delete user** icon.

Note: When you have a new account or service added, each user will need to be entitled to that account or service as appropriate.

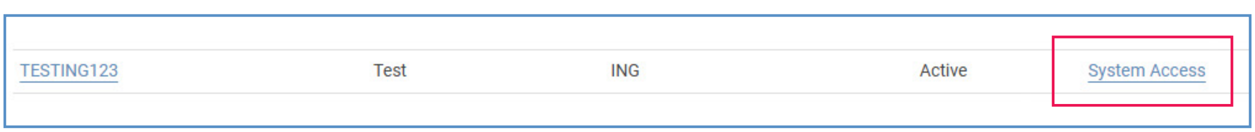
Resetting passwords and unlocking users

As an administrator, you can assist users who have gotten locked out or need to have their password reset. Follow the steps below.

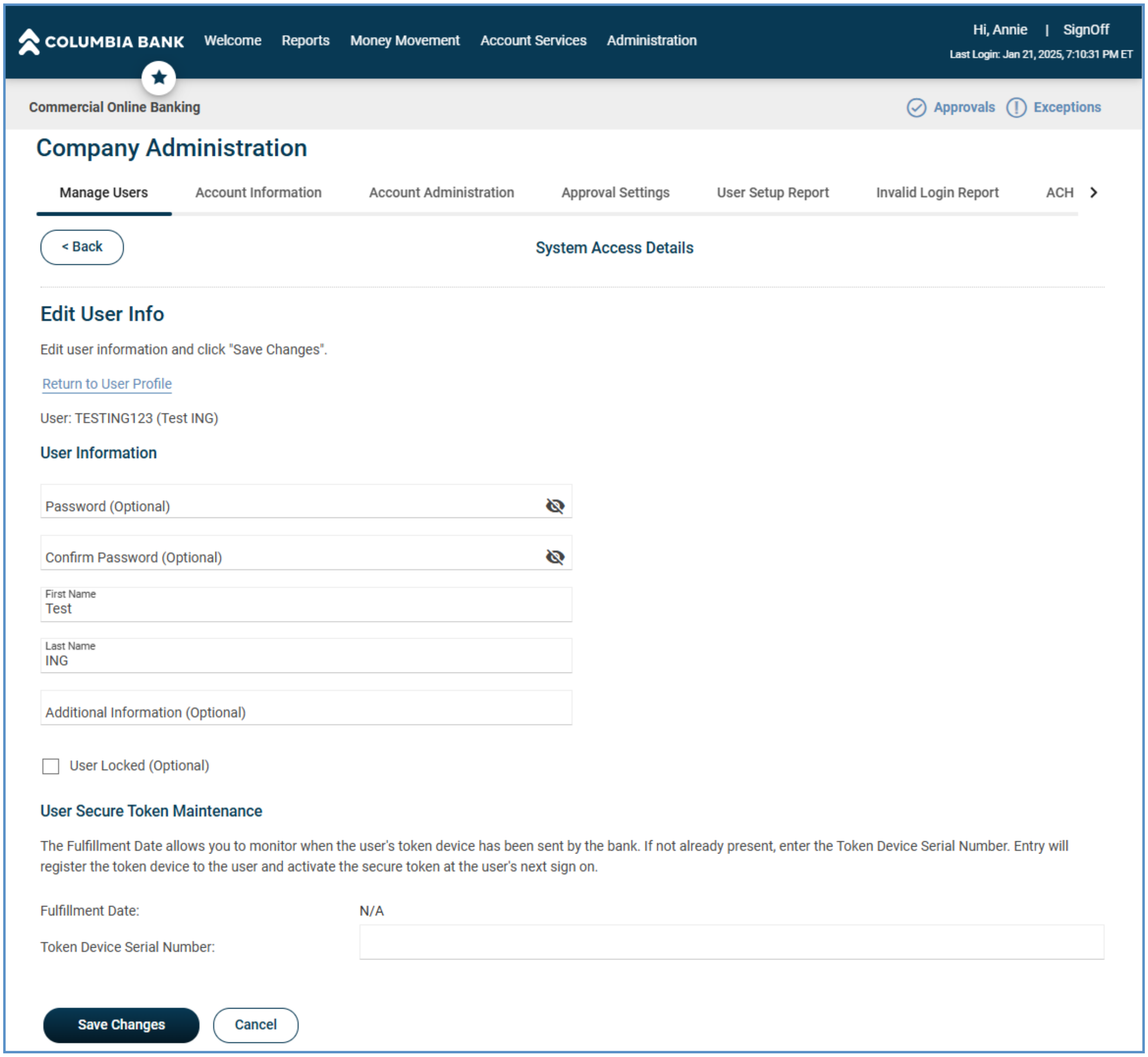
1. Select **Administration** from the main menu then **Company Administration**.



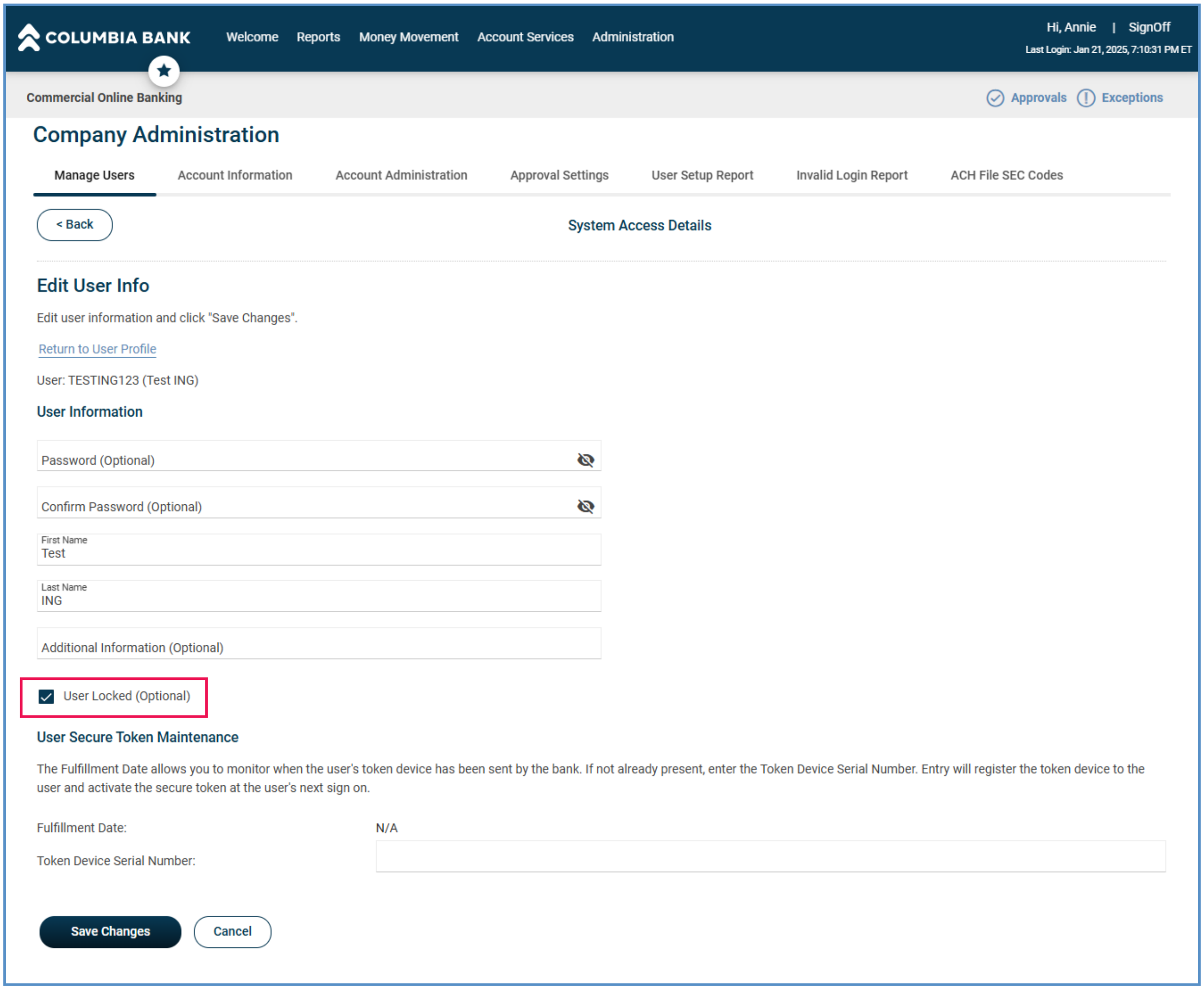
2. Locate the user on the Manage Users tab and select the system access link.



3. To provide a temporary password for a user, click on System Access and complete the **Password** and **Confirm Password** fields. Click Save Changes to confirm the password update.



4. If a user's access is locked, you will see a check mark in the **User Locked** field. Select the checked box to unlock the user. Alternatively, if you wish to lock a user, you can place a check mark in the box.



5. Select **Save Changes** to apply.

Account Numbers & Nicknames

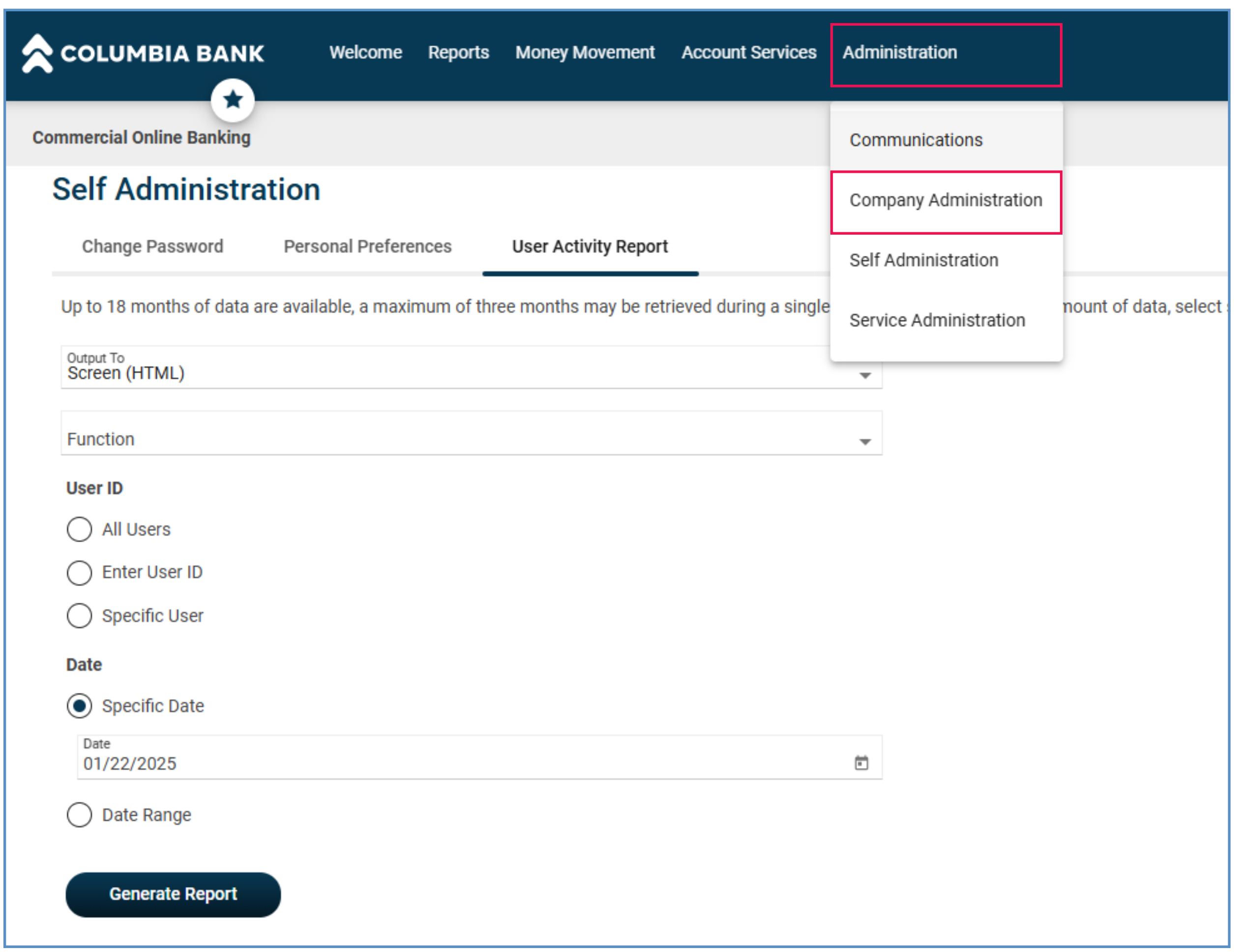
Only administrative users have access to full account numbers within the system.
To locate the number, go to the Account Information tab.

Administrators can also edit the nickname of the account by selecting the name and entering a new nickname in the description field.

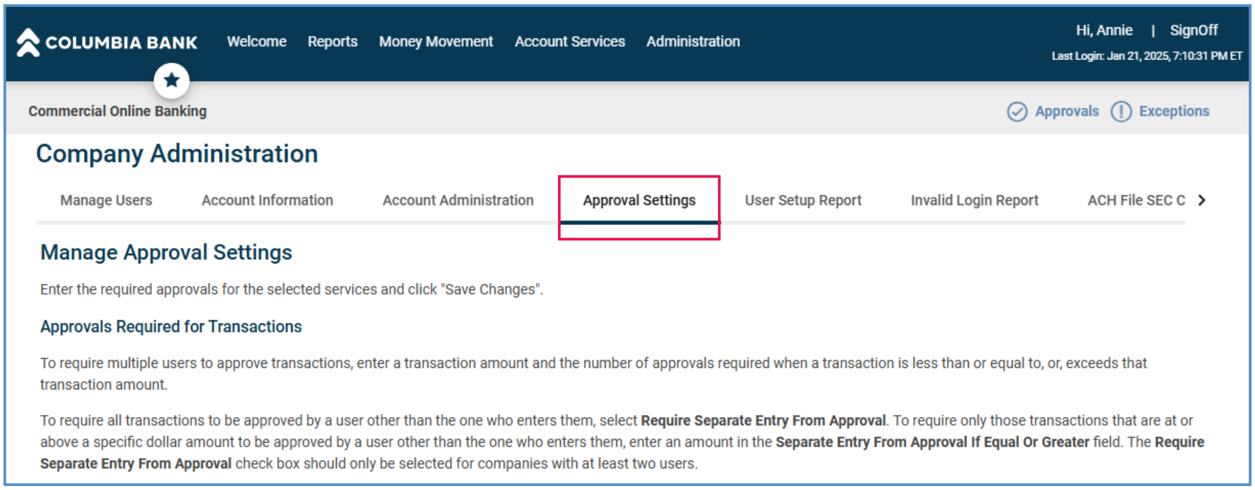
Setting dual approvals

To set dual approval for your company, follow the instructions below.

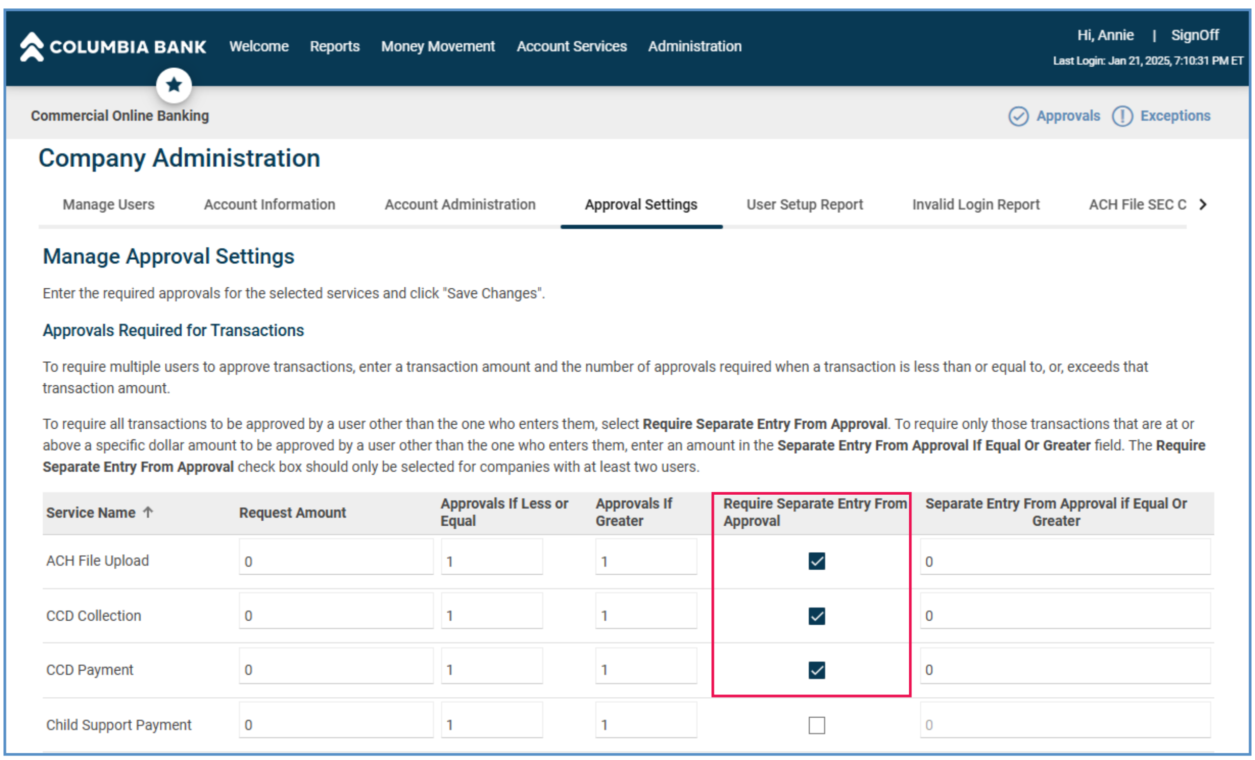
1. Go to **Administration** in the main menu then **Company Administratio**n.



2. Select **Approval Settings**.



3. The **Require Separate Entry from Approval** box will require one person to enter a transaction and one person to approve the transaction.

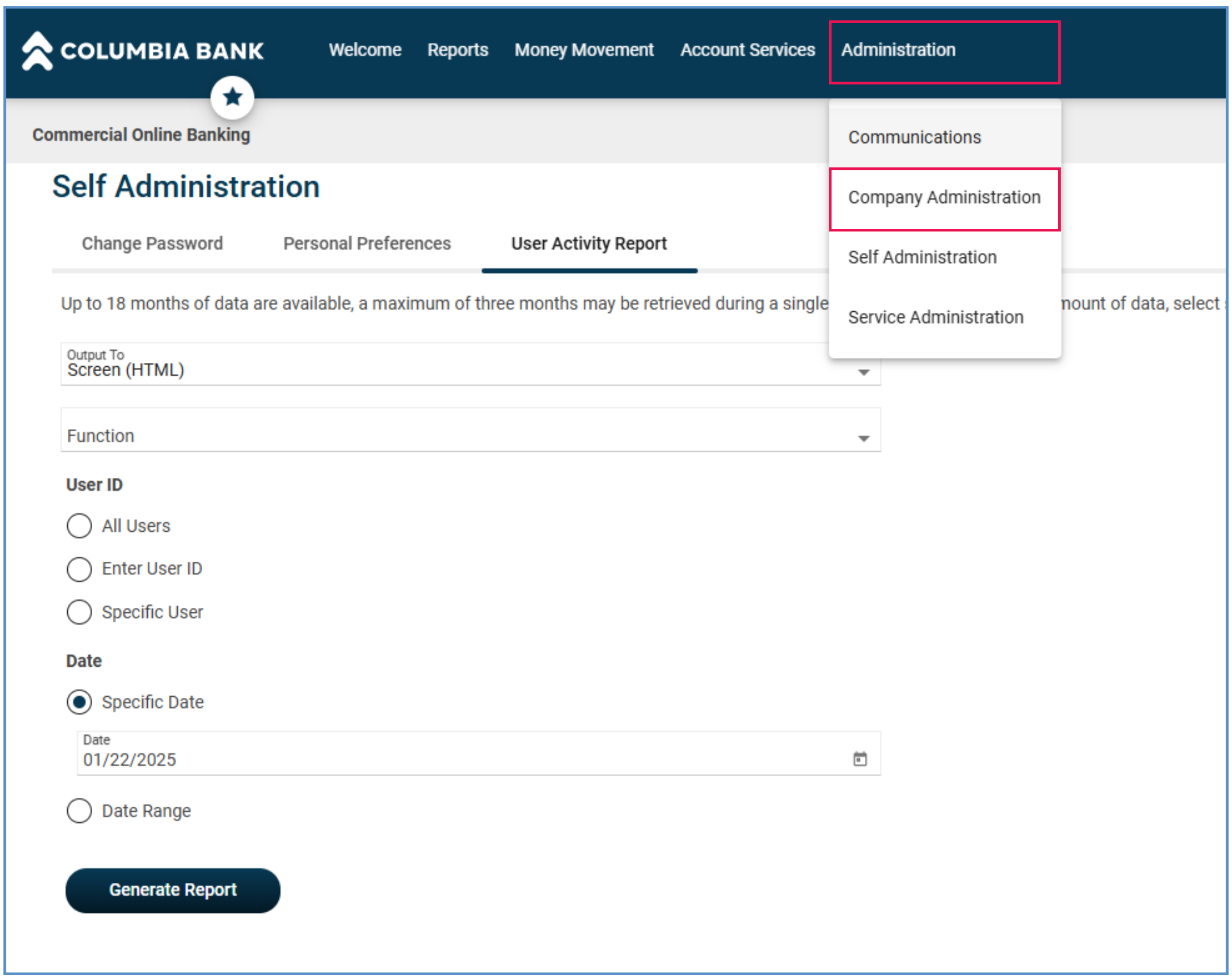


4. Once you have made your desired changes, scroll to the bottom and click **Save Changes**.

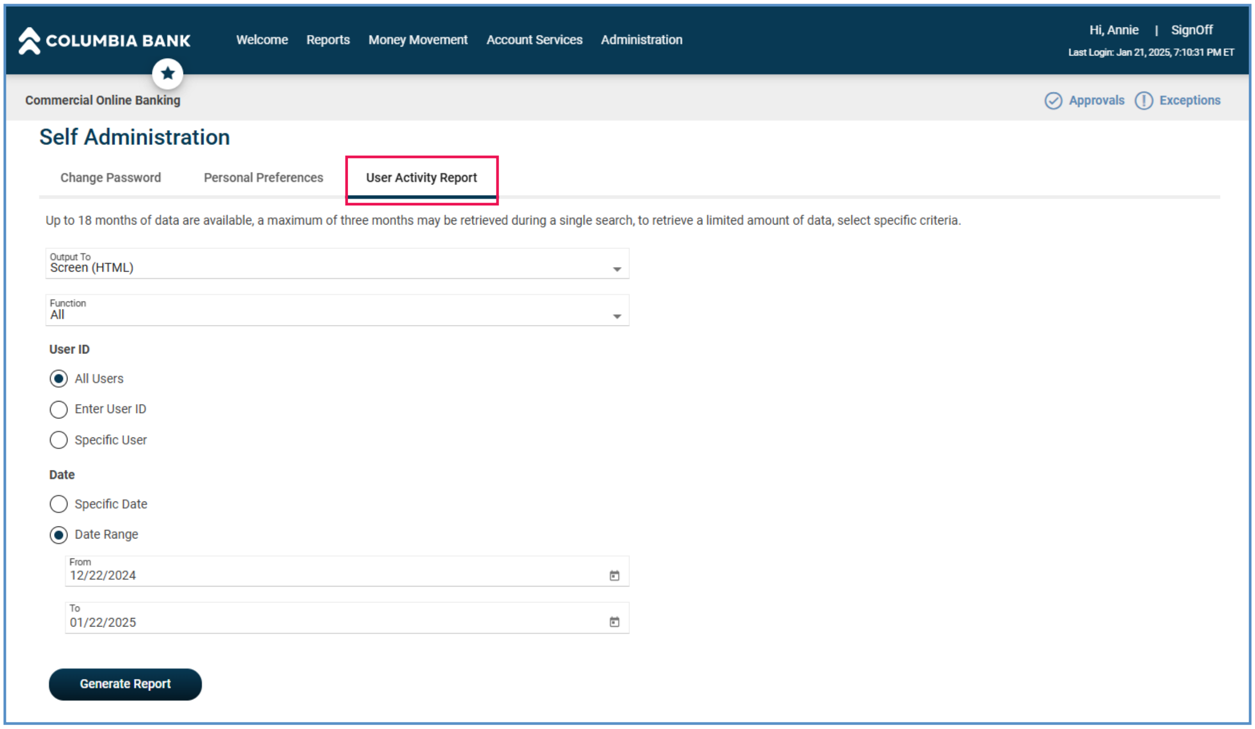
Viewing a User Activity Log and setting up alerts

Viewing a User Activity Log

1. Go to **Administration** in the main menu, then **Self Administration**.



2. Select **User Activity Report**. You can either export the information as a CSV file or view it on your screen.



3. Determine how you'd like to view the report and if you want to see all users or a specific user.

4. Choose a specific **Function** or click **View All**.

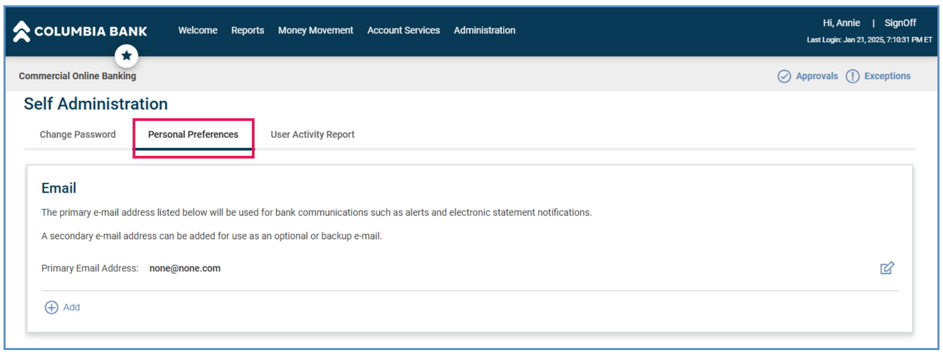
5. Select or enter a **User ID**, choose **All Users** or enter a **Specific User**.

6. Choose the date or date range of activity to view.

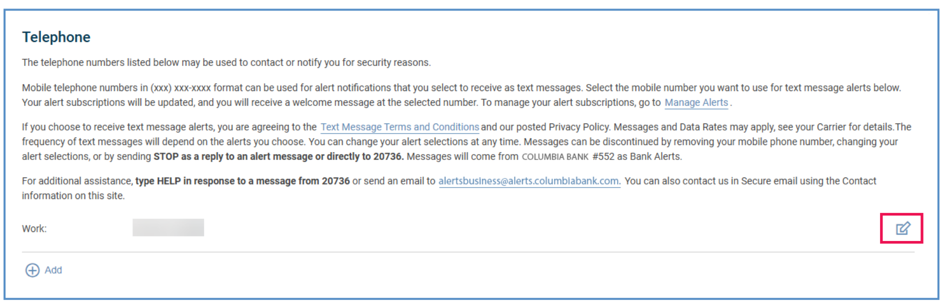
Setting up alerts

Within Self Administration, the email address or phone numbers used to receive alerts for users can be edited.

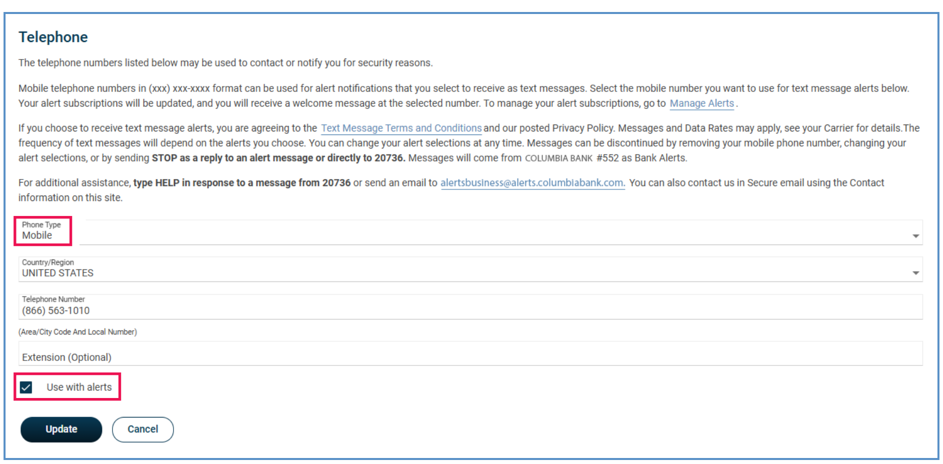
1. Select **Personal Preferences**.



2. Click the **Edit** link, ensure a mobile number is listed.

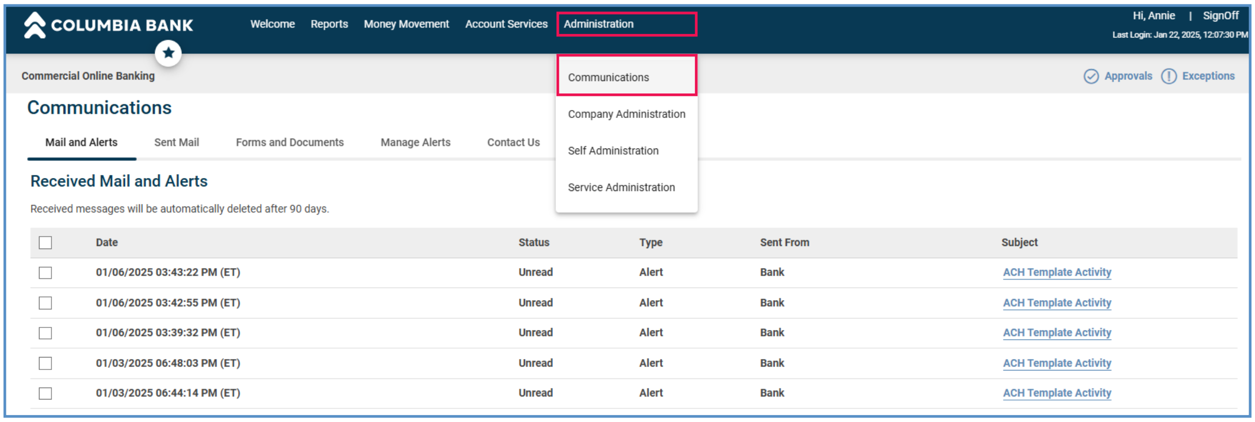


3. Select the box next to **Use with alerts**, then **Update**.

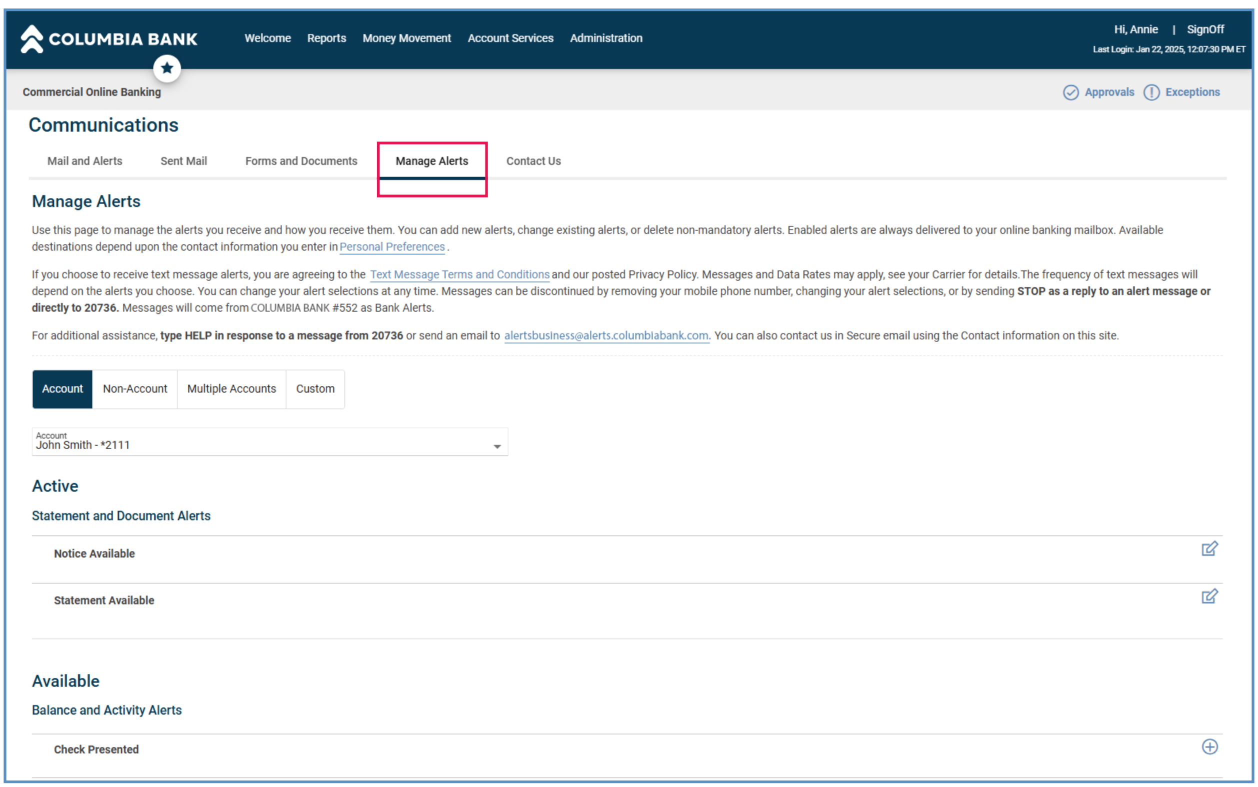


Once a mobile number is enabled, set up the alerts.

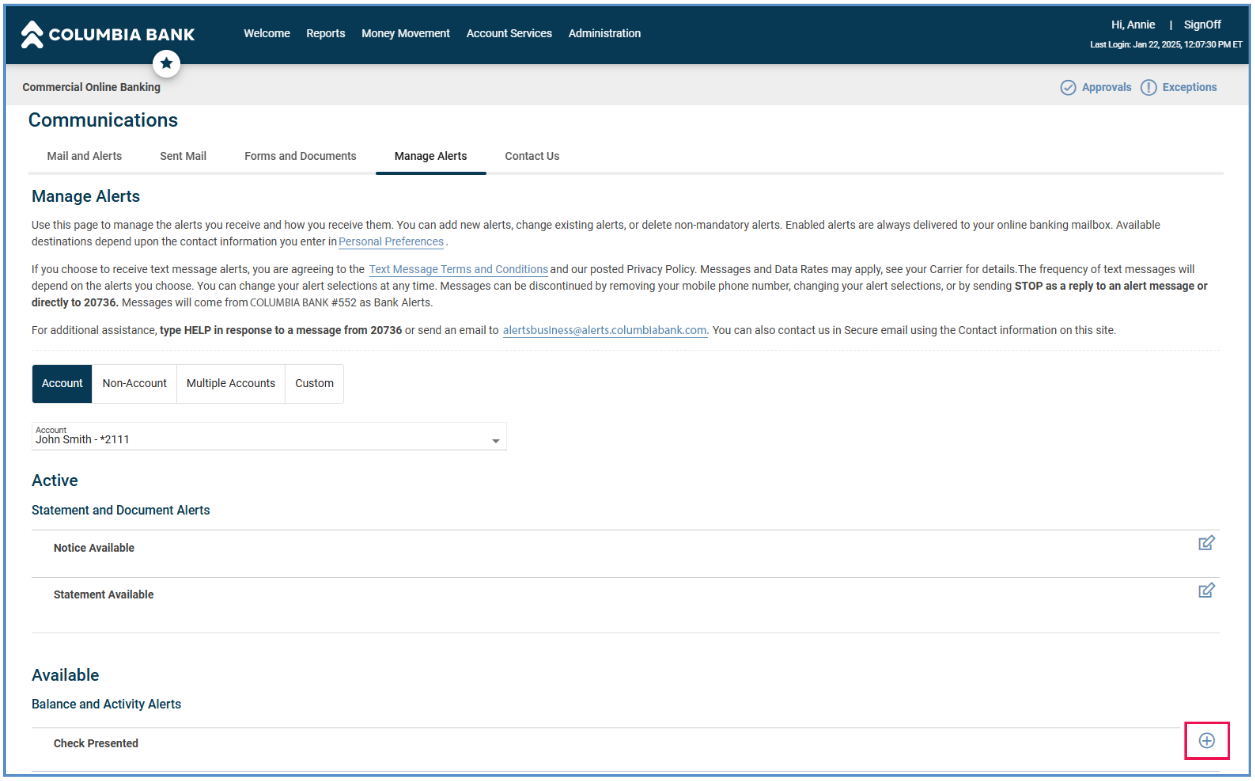
1. Go to **Administration** then **Communication**.



2. Select **Manage Alerts**.



3. Choose the account, locate the type of alerts you would like to activate and select the **Add** button.



4. Select the alert notification preference and then the **Add** button.