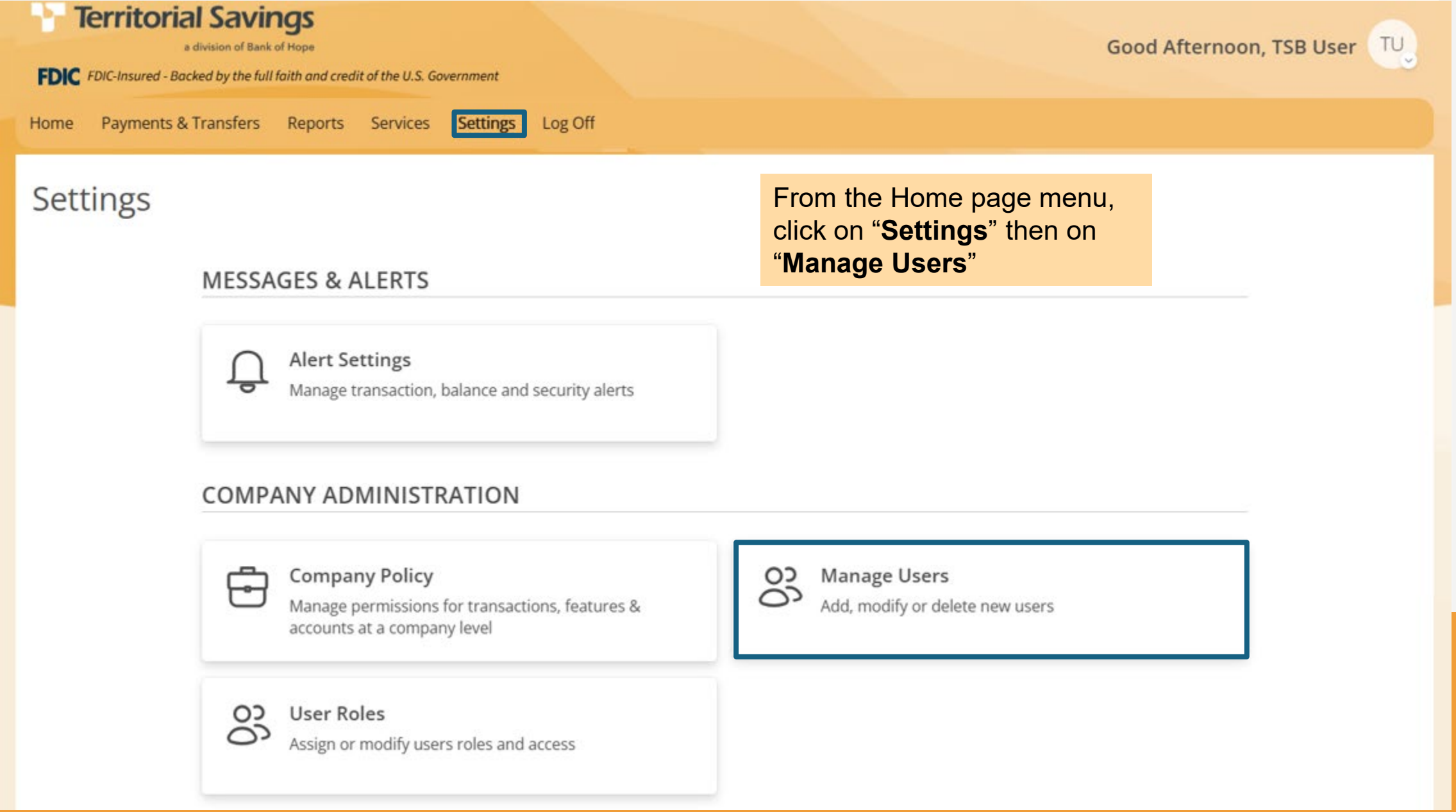
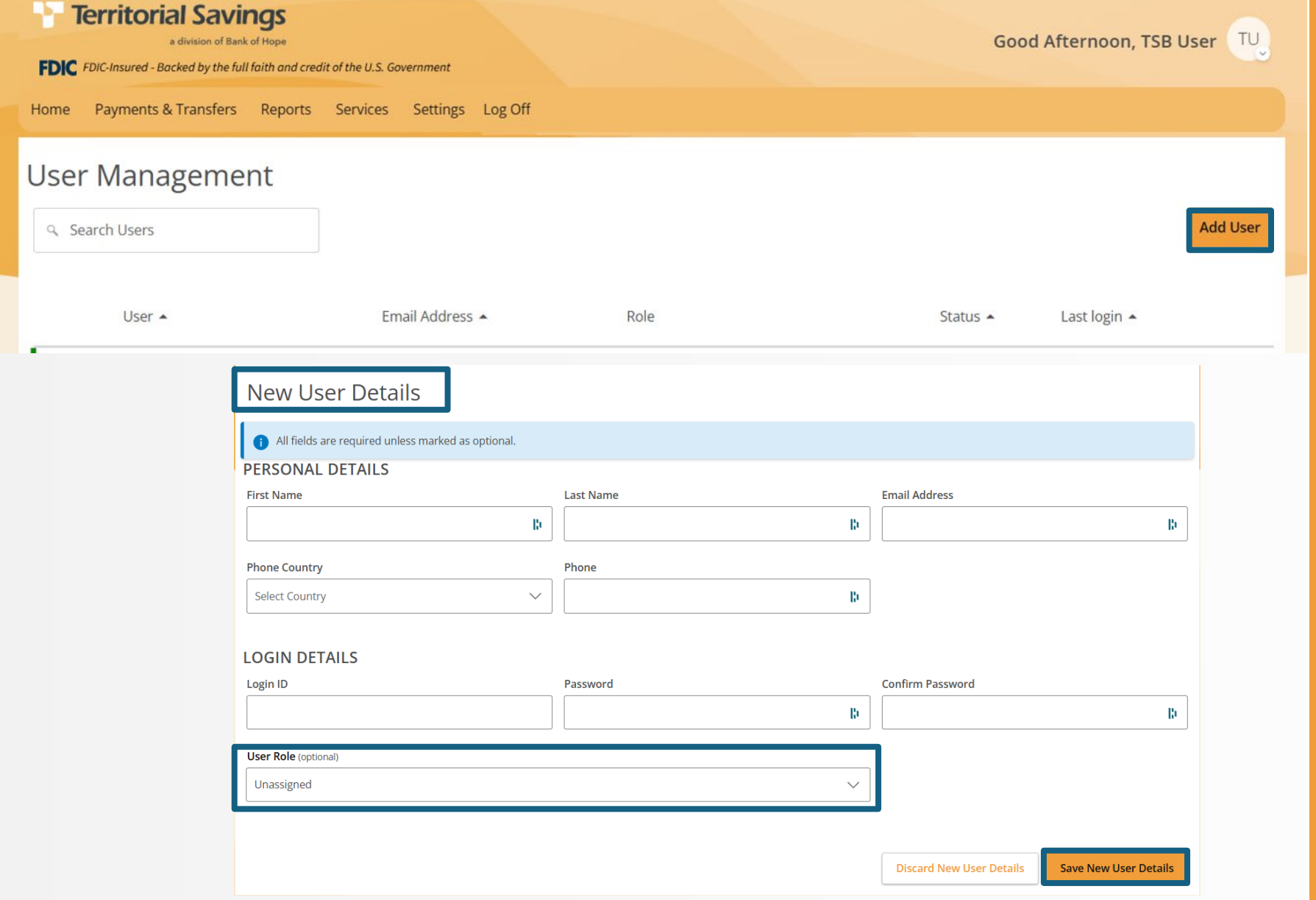
Welcome to Business Online Banking

Managing Admin Users
and User Roles

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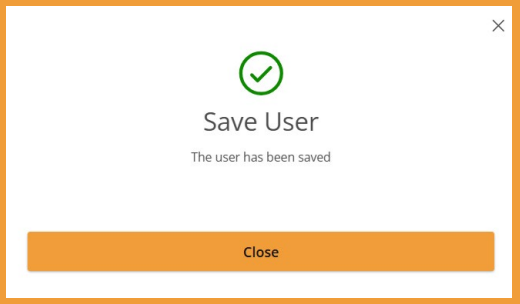
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Adding a User
Click on **Add User** and complete the **New User Details.**

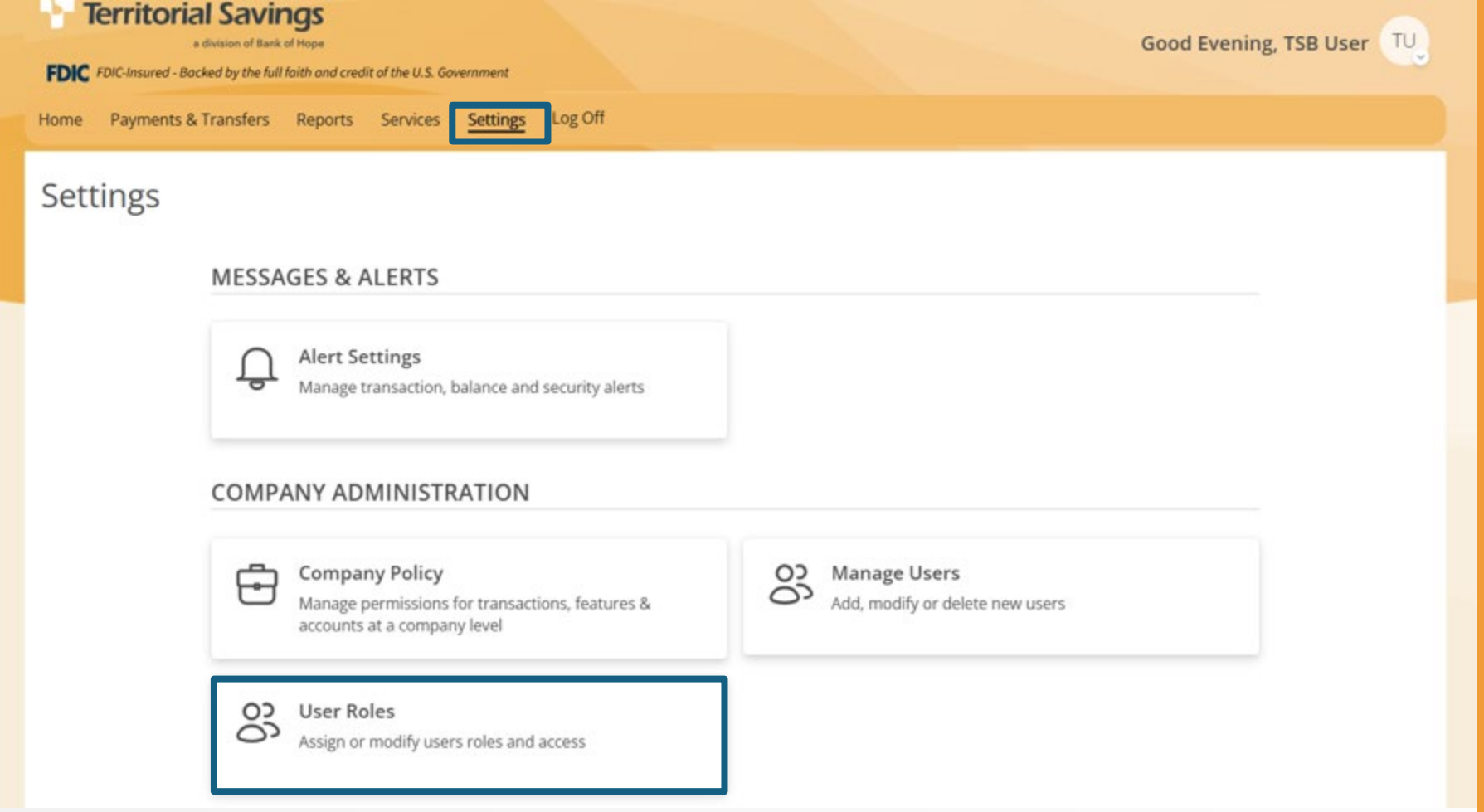
All fields are required except **User Role.**
User roles can be created through the **User Role** tile.

Once you **Save New User Details** the below message will appear:



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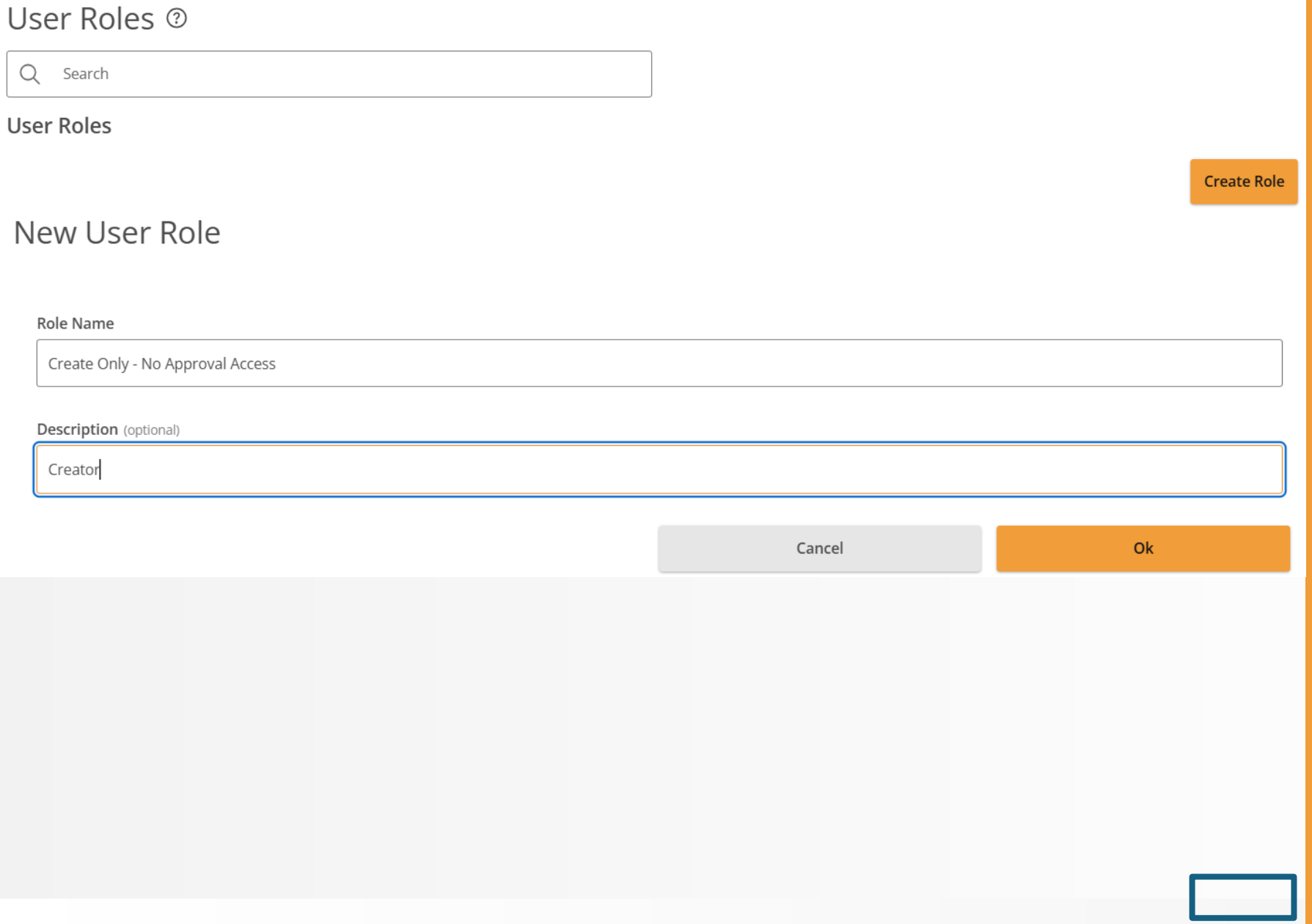
Creating User Roles

Under the Home Page menu click on Settings then click on the User Roles tile.

Under **User Roles** you will be able to create roles, assign or modify user roles and access. The same role can be assigned to multiple users on just one user.

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Creating User Roles

Click on **User Roles** then on **Create Role**.

Assign a **Role Name**.

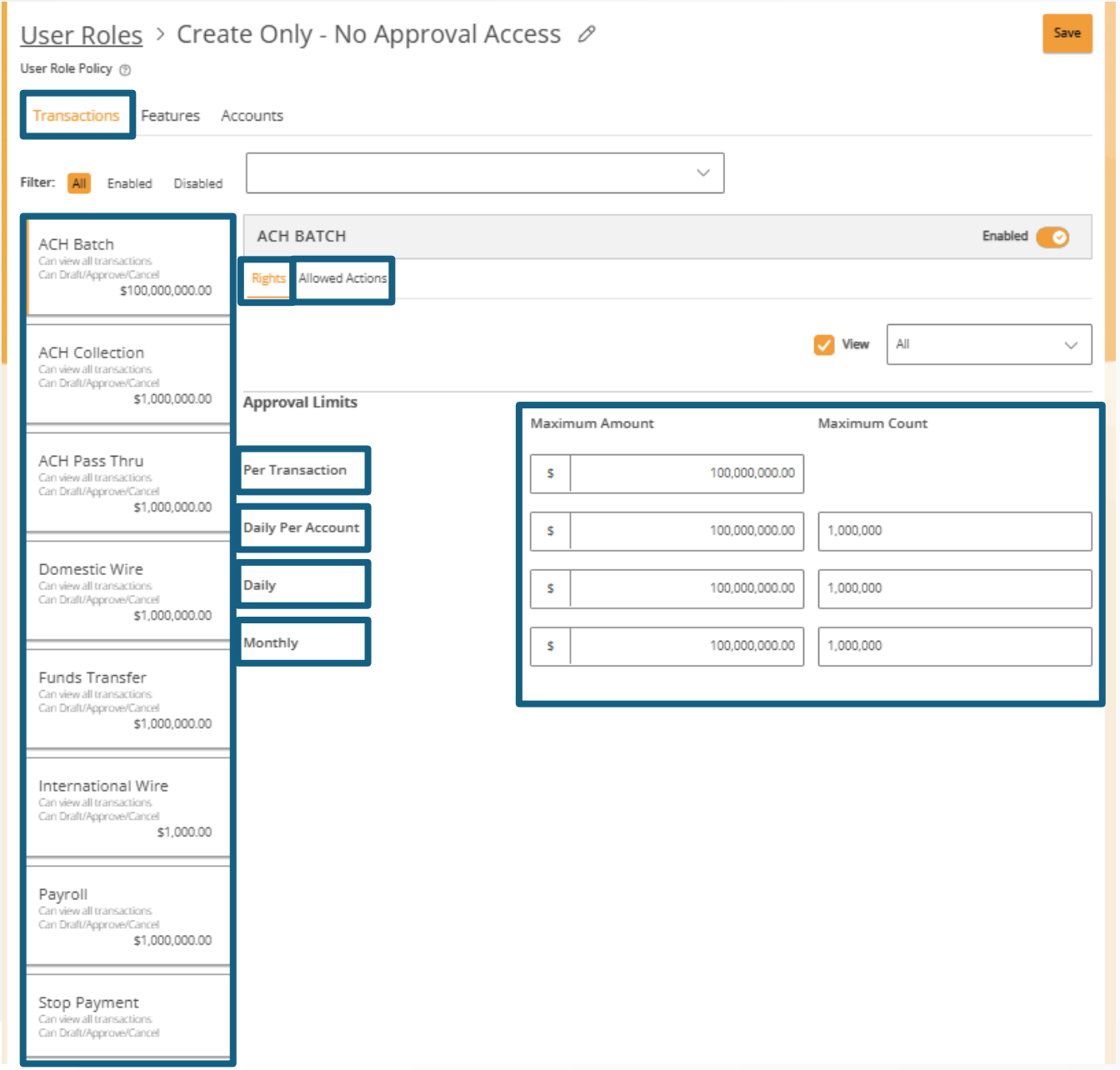
Example:
Create Only
Approve Only
Create and Approve

Description is optional.

Important: If the user is assigned the role of ACH or wire payment approver, a security token is required. Please contact the bank to request and activate the token.

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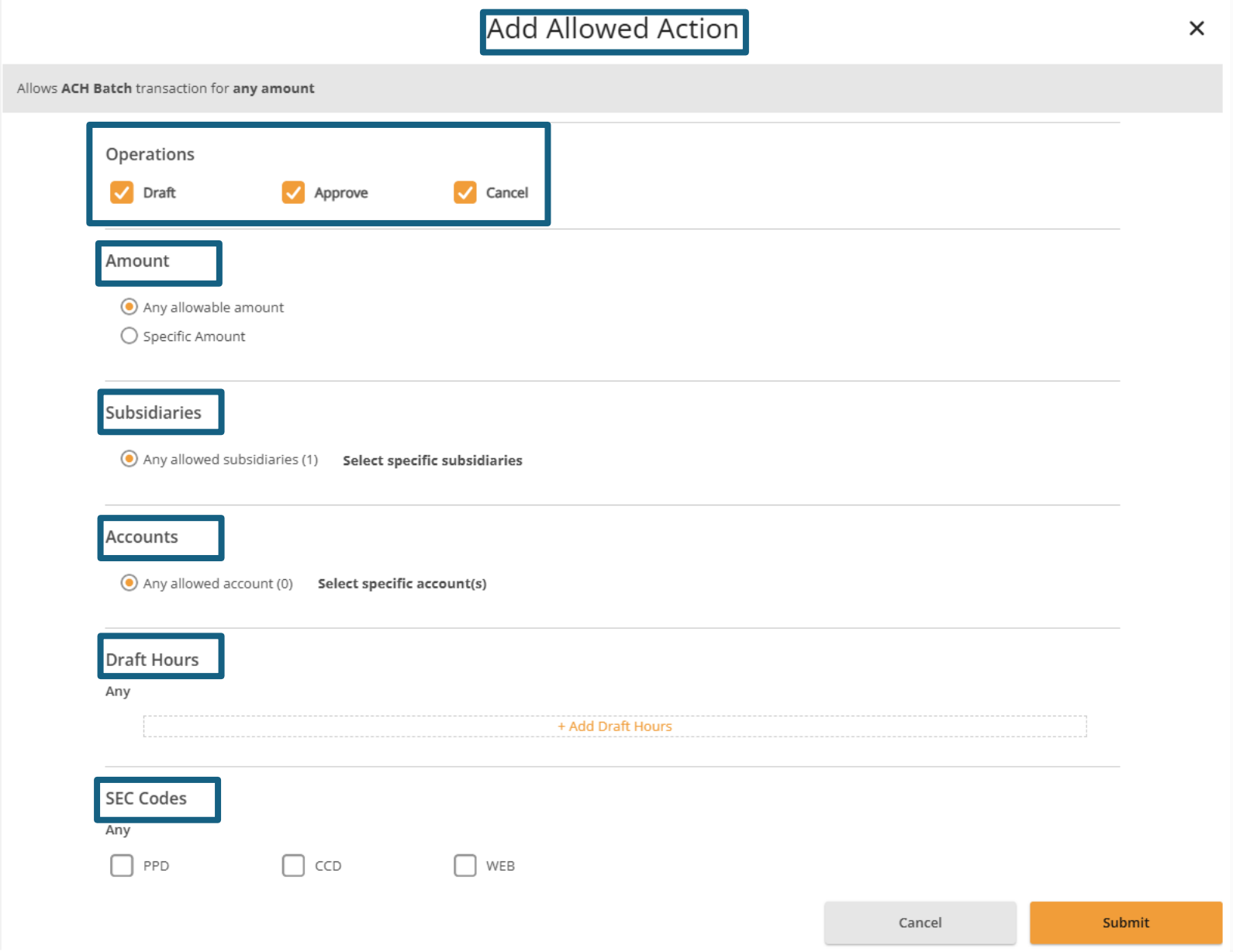
User Role Policy: <u>Transactions</u>

Determine limits for all transaction types (if applicable) and the Max limits and Max count.

Once the **Rights** have been assigned click on Allowed **Actions**.

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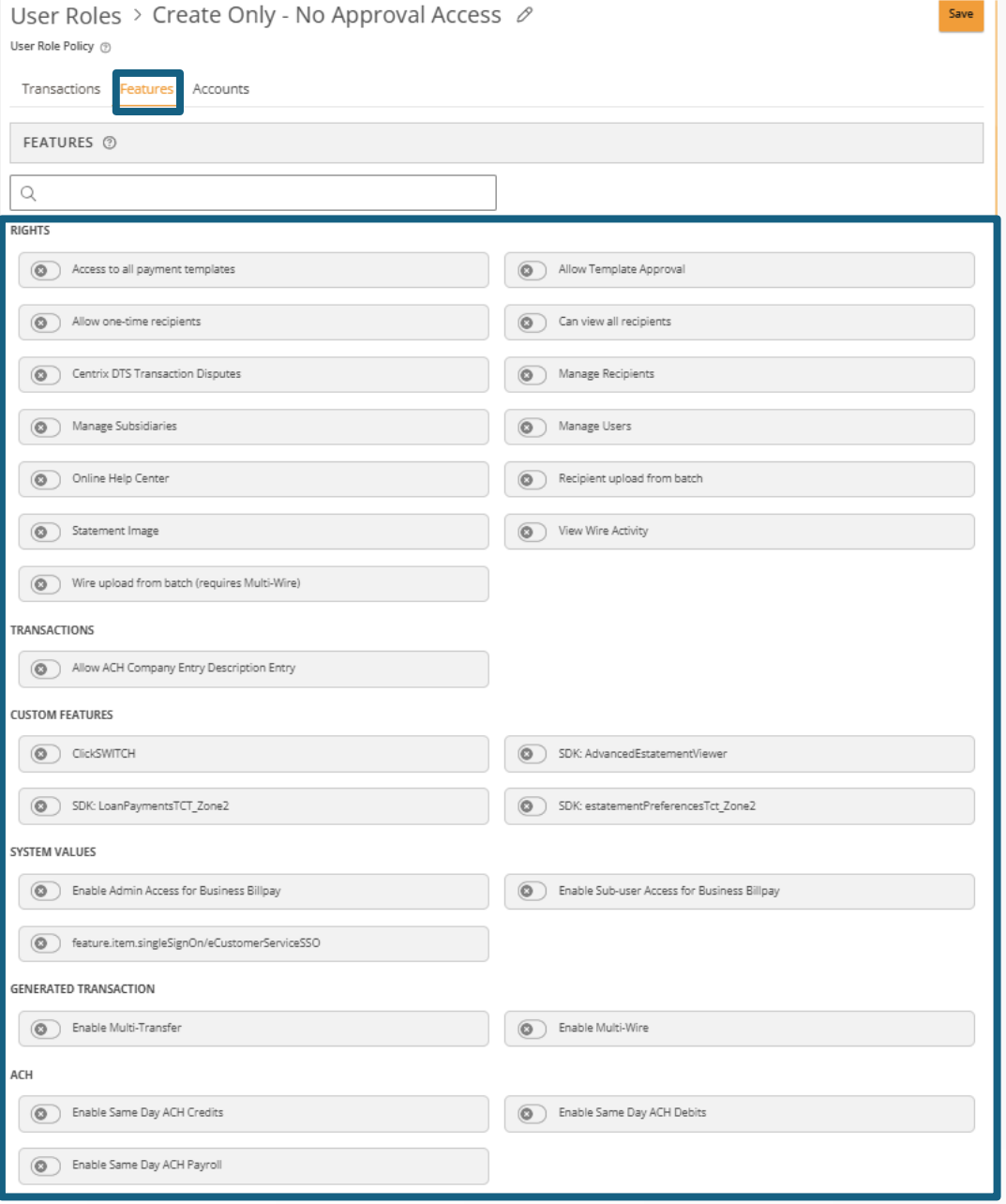
User Role Policy: <u>Transactions/ Allowed Actions</u>

Determine if the limits apply for Draft transactions, Approve transactions and Cancel transactions.
Determine if the following sections apply for this role. Amount, Subsidiaries, Accounts, Draft Hours and SEC codes.

Note: adding "**Draft Hours**" or "**SEC Codes**" will restrict after hours actions or SEC Code by type.
Leaving these sections as is would provide access to all hours and all SEC Codes.

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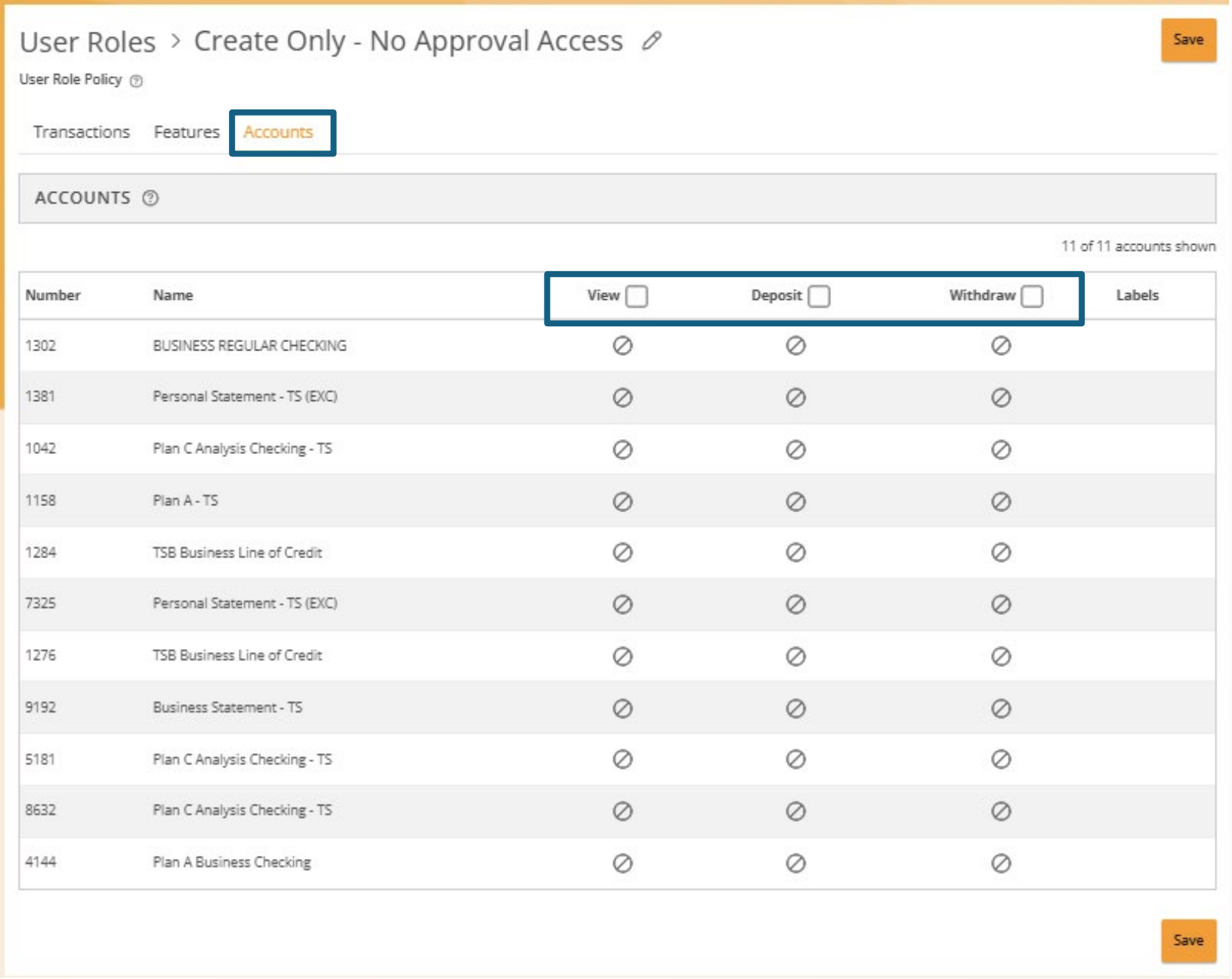


User Role Policy:
Features

Determine what features apply for this role.
Review and confirm each section.

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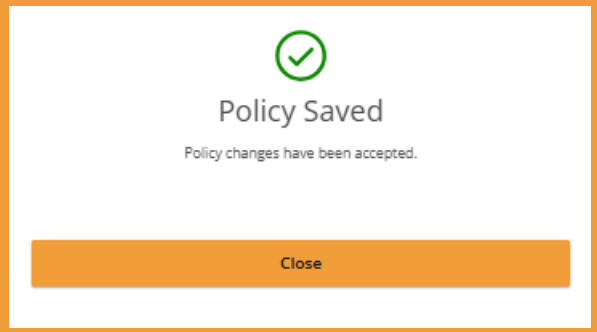
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User Role Policy:
Accounts

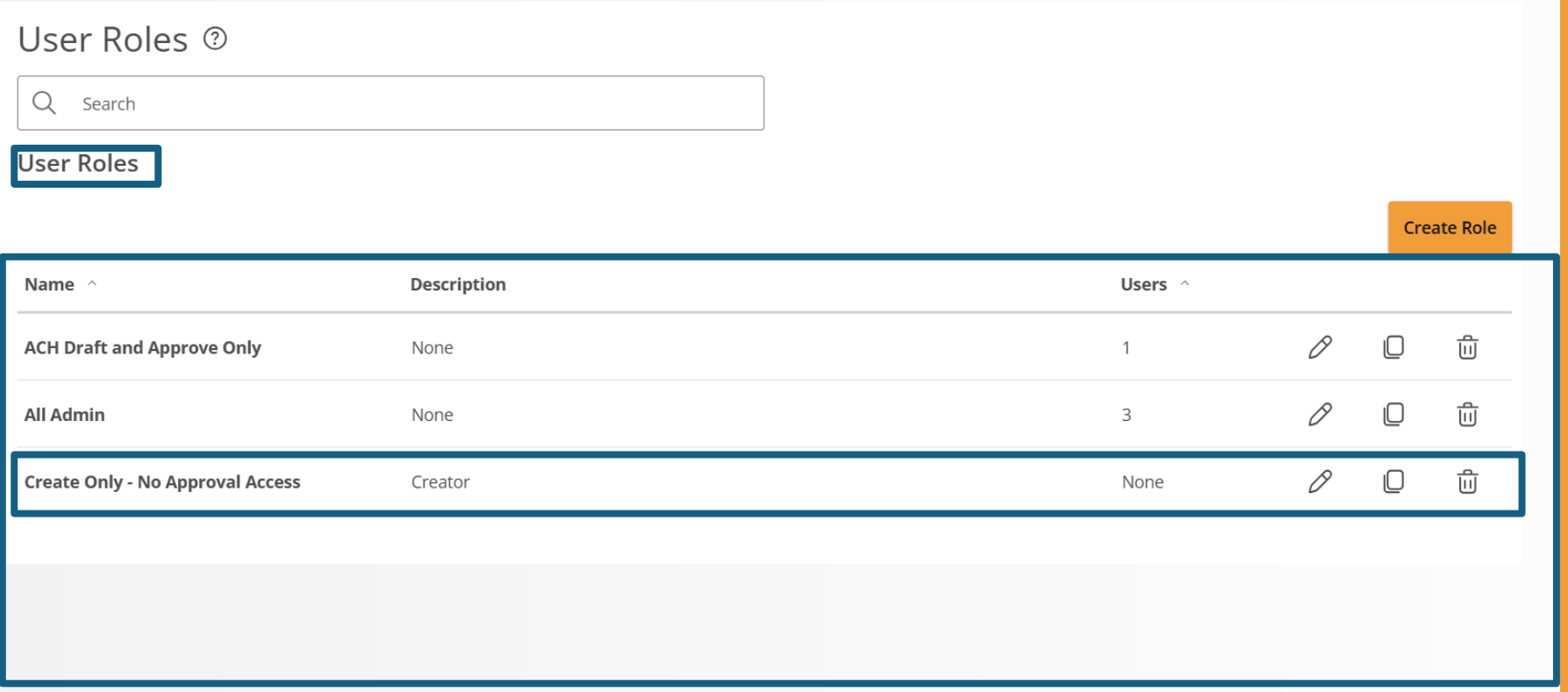
Determine what features apply for this role and which accounts they apply to. Review and confirm each section.

Once completed click save. The below message will appear once saved.



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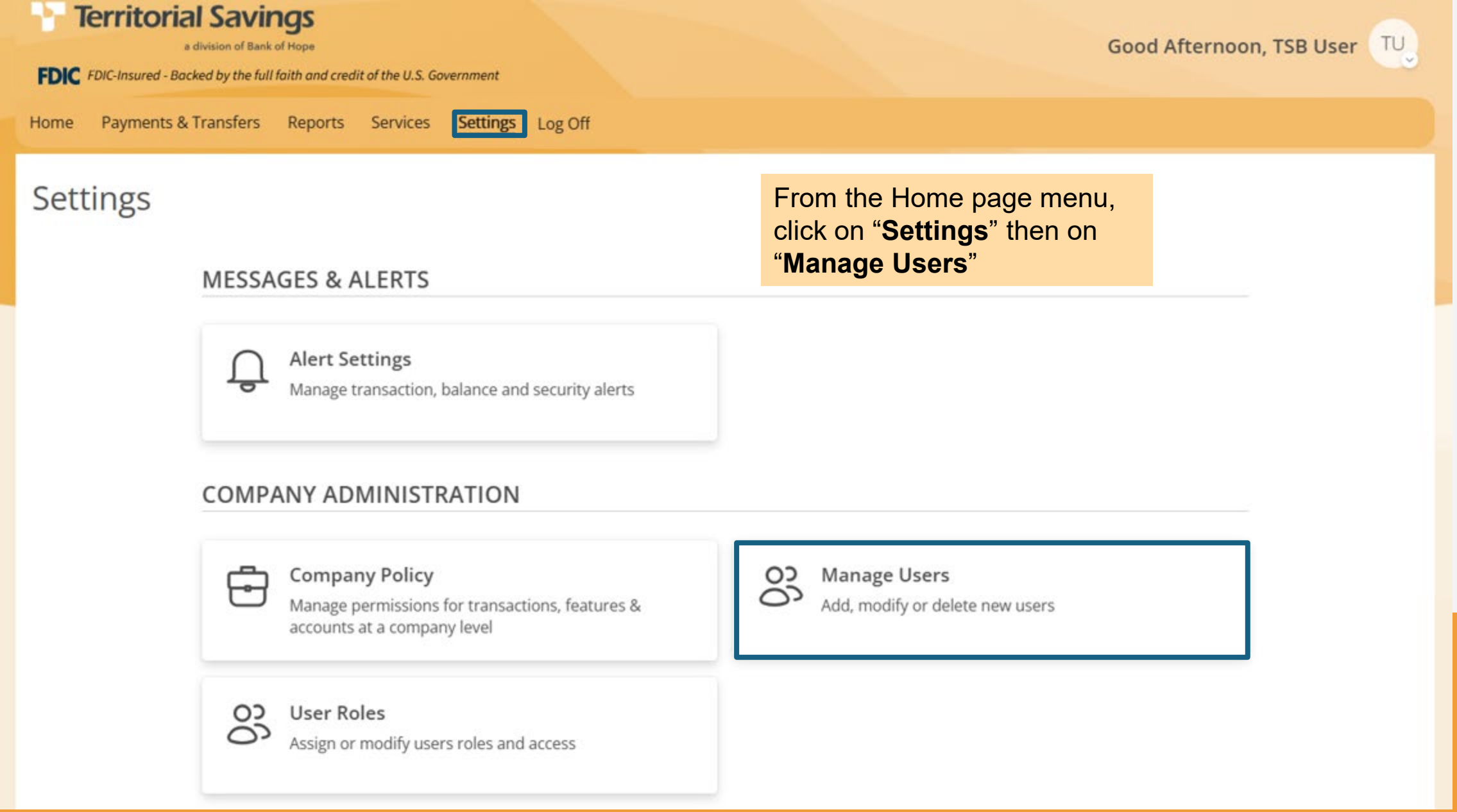


Validate User Roles
Confirm User Role was created by returning back to Settings then **User Roles** from the Home Page menu.

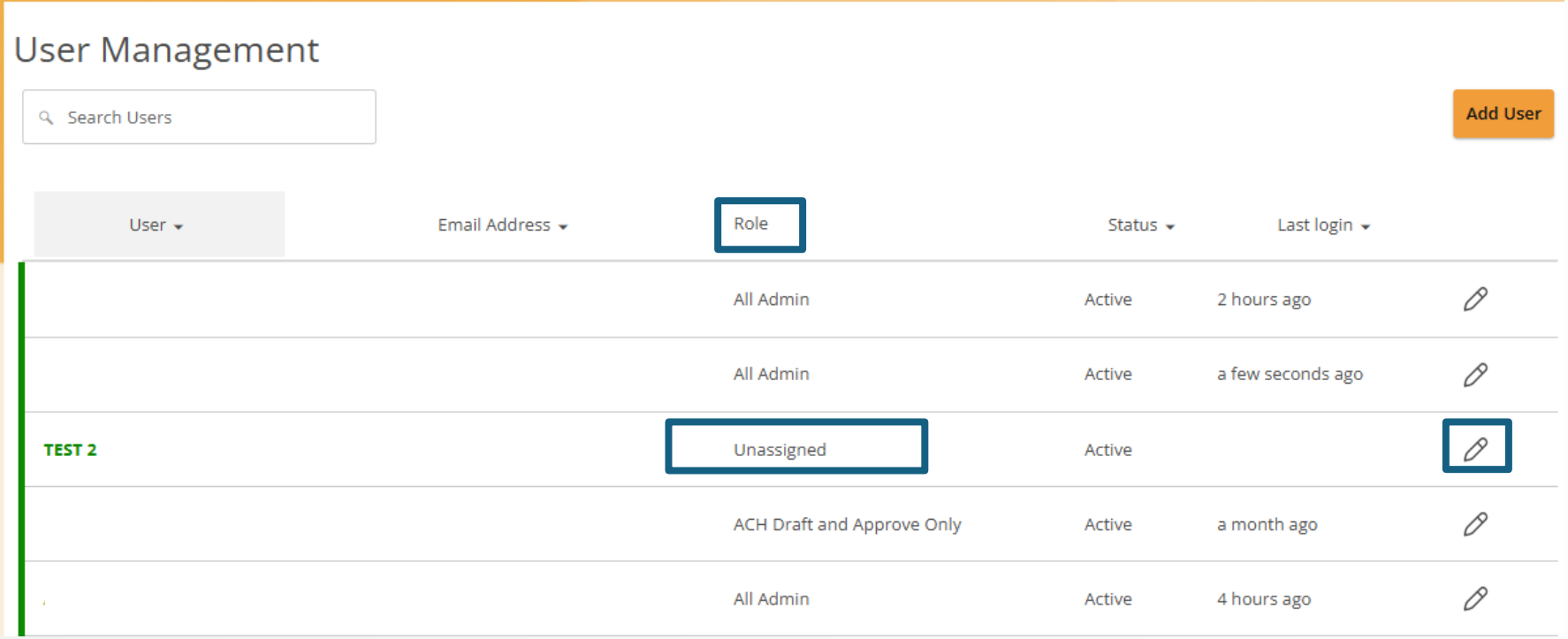
Currently no users are assigned this role. Return to **Manage Users** to assign this role.

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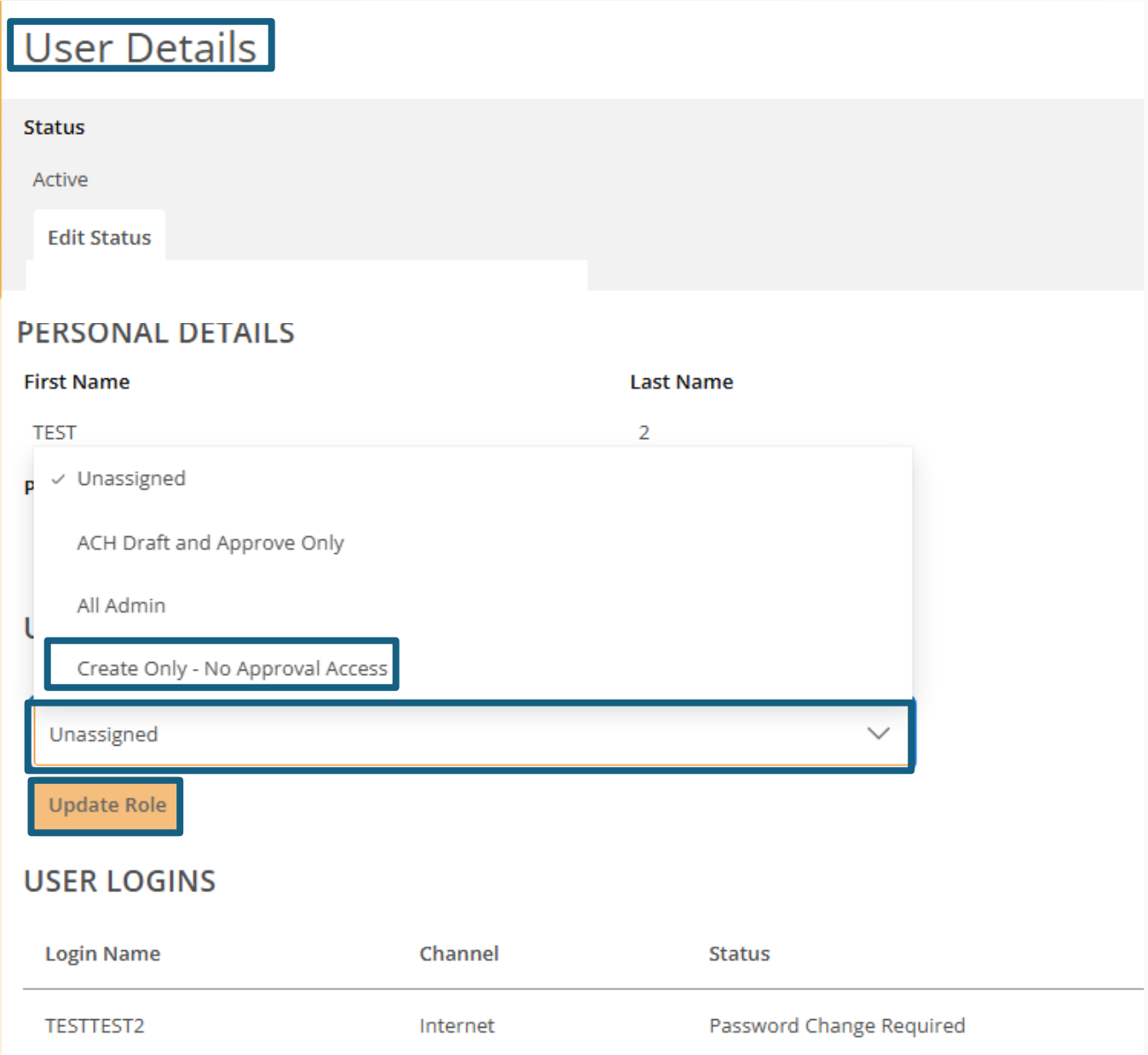


User Management

Update user with unassigned Role by clicking on the icon.

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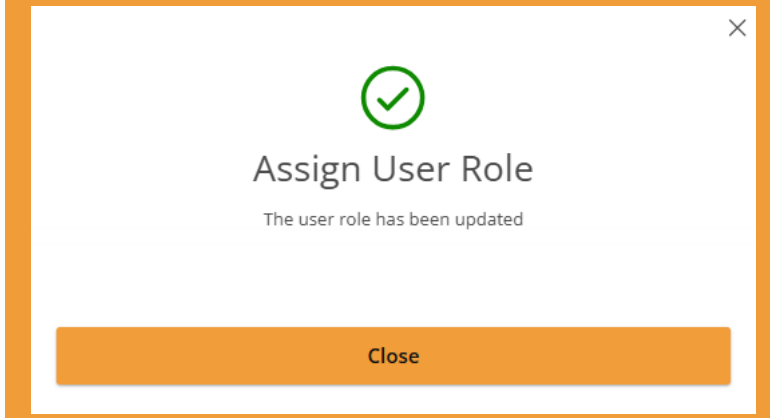
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User Management

Update user with unassigned Role by clicking on the icon.

Once updated, the below message will appear.



Repeat process to create additional users or user roles.

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