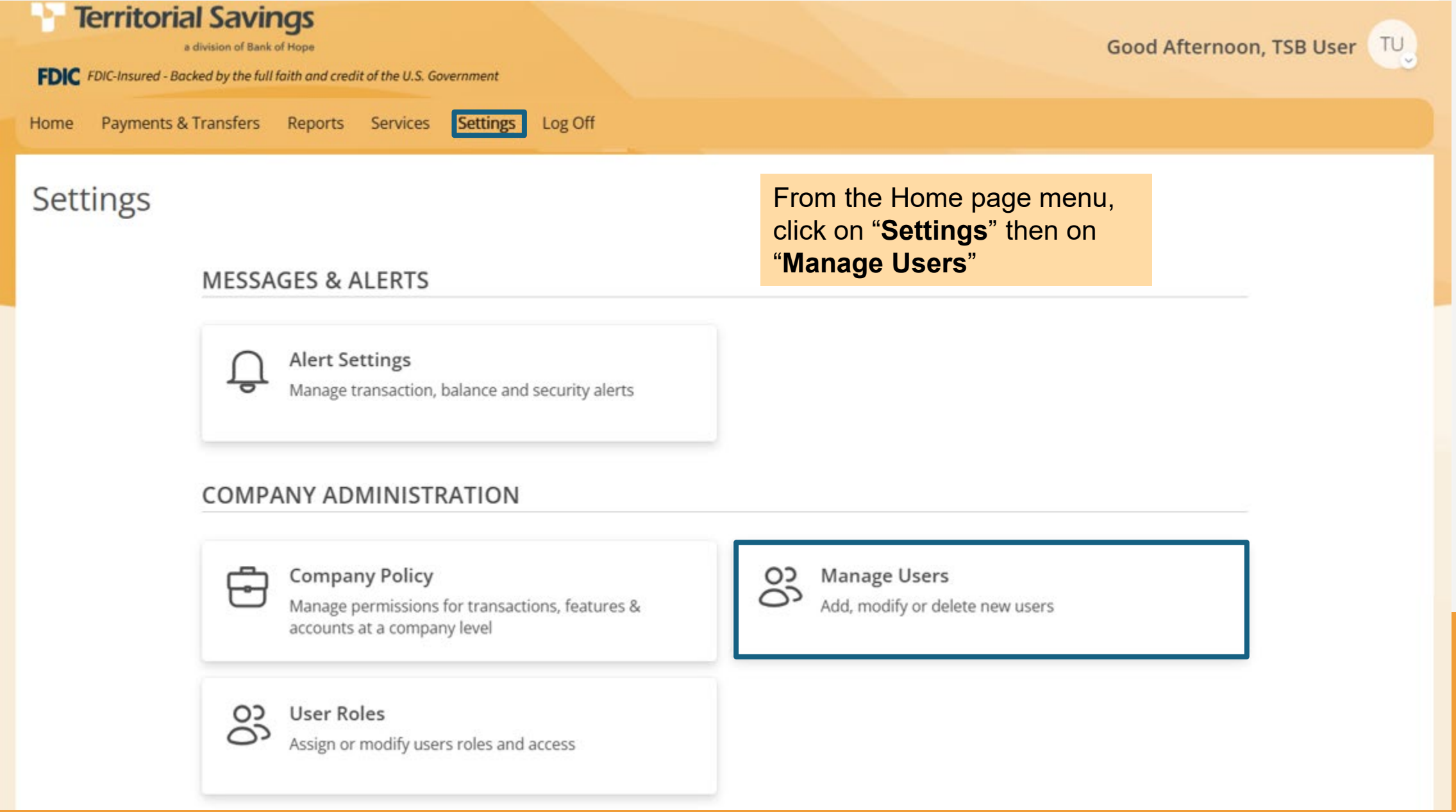
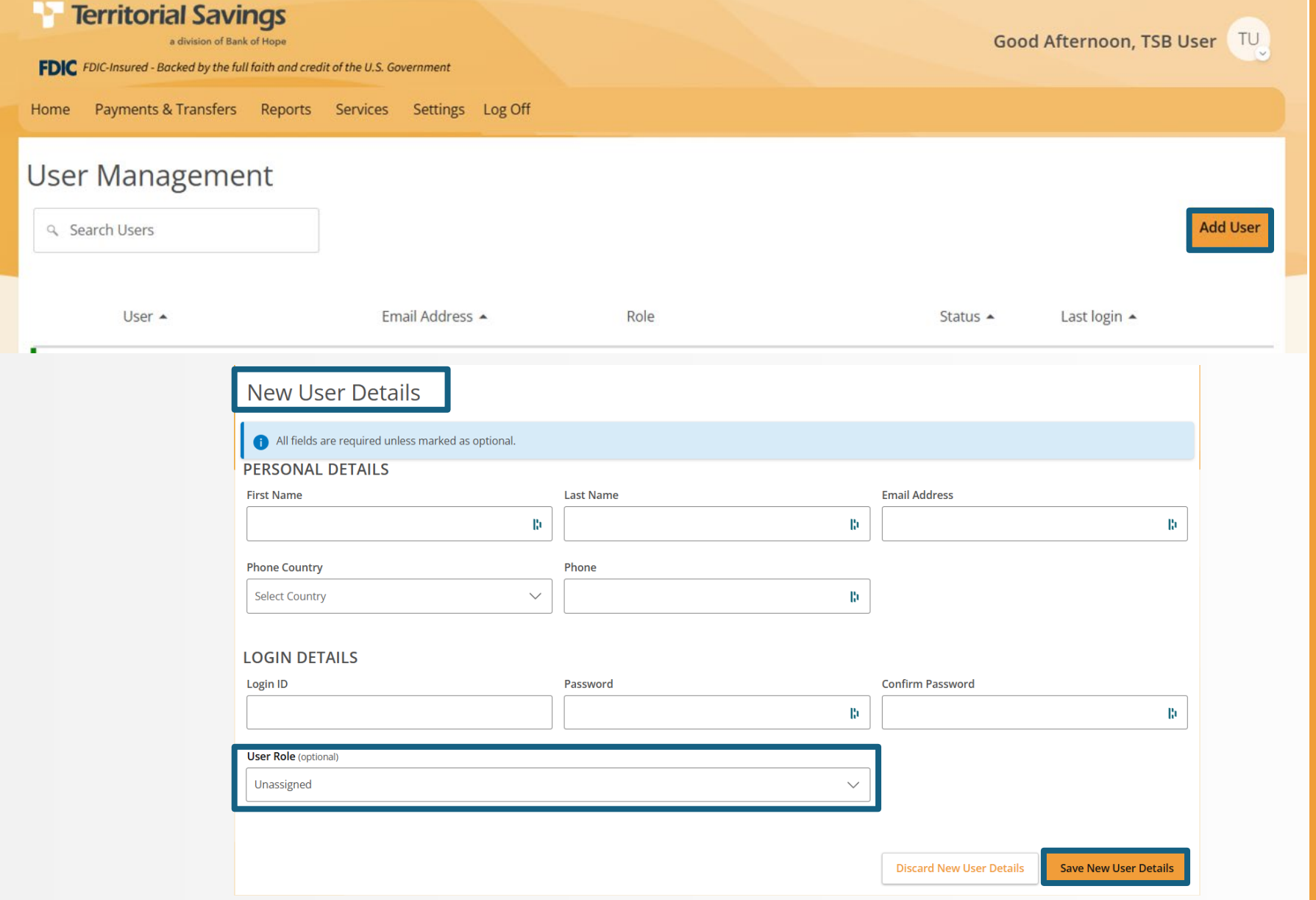
Welcome to Business Online Banking

Managing Admin Users
and User Roles

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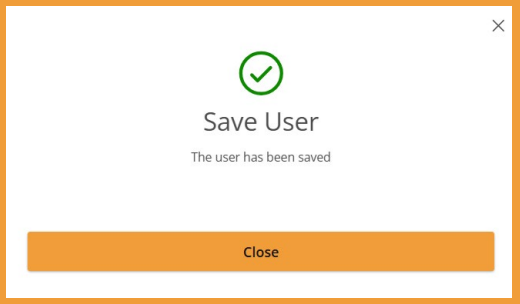
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Adding a User
Click on **Add User** and complete the **New User Details.**

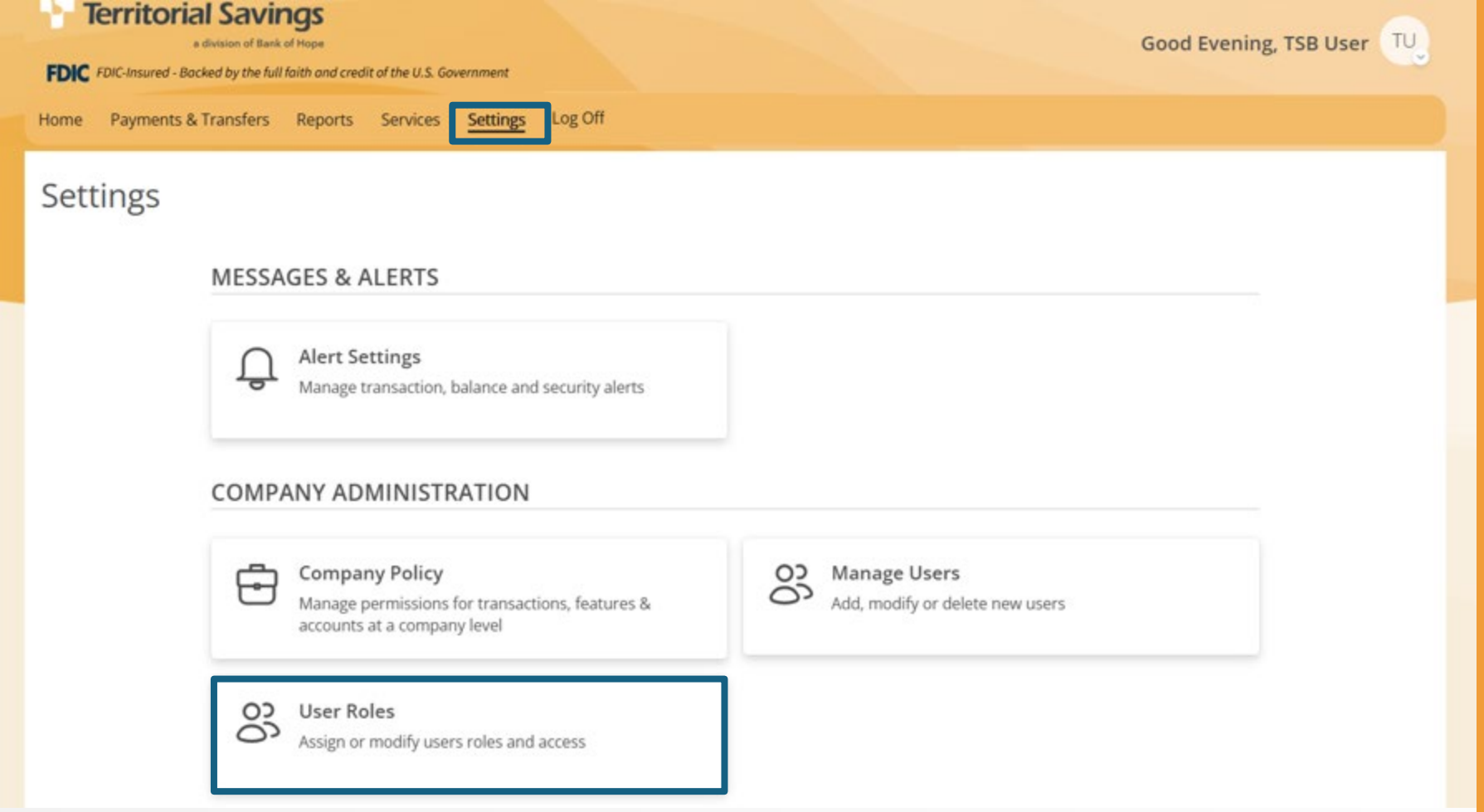
All fields are required except **User Role.**
User roles can be created through the **User Role** tile.

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



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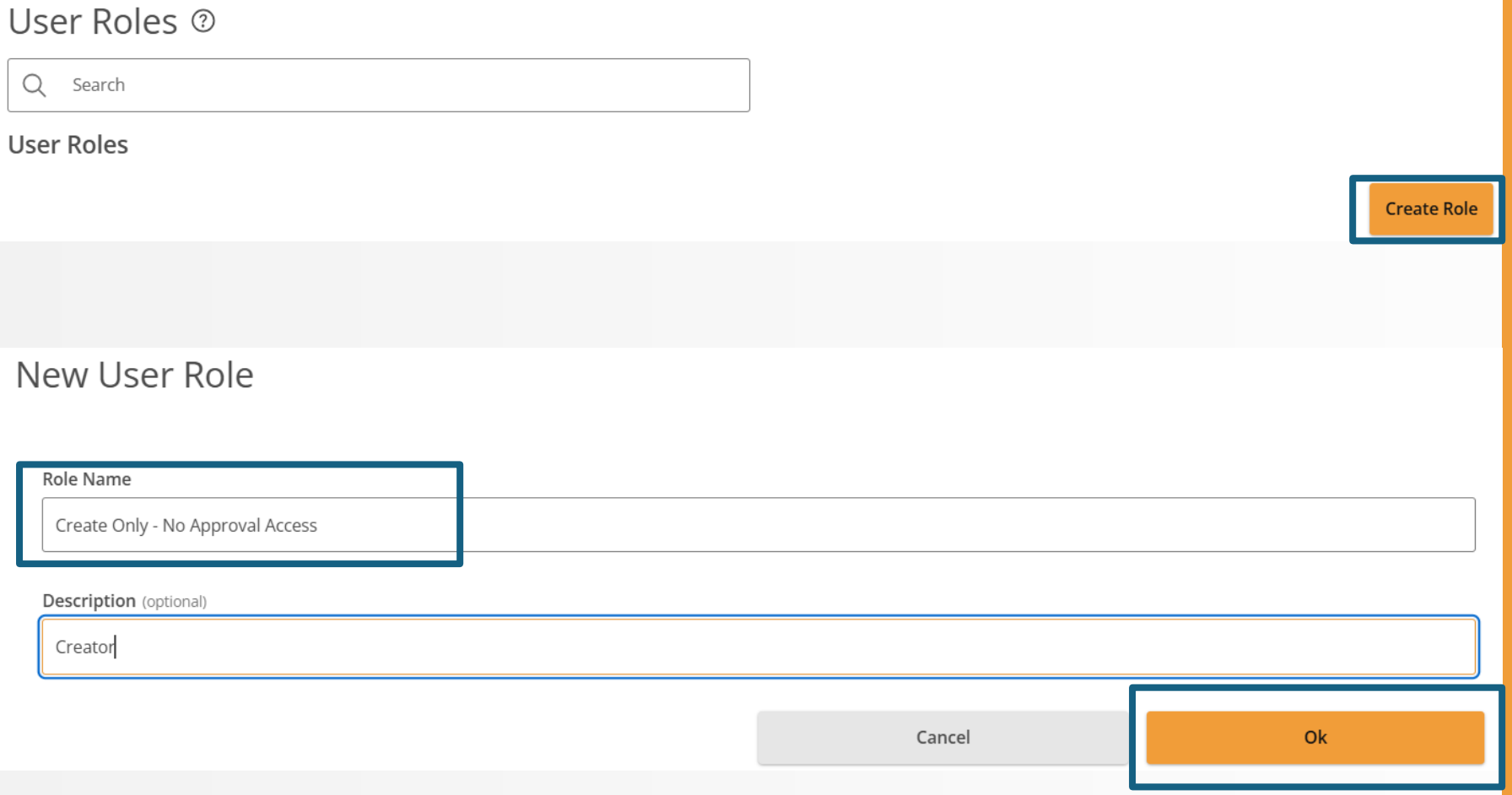
Creating User Roles

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 and 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**.

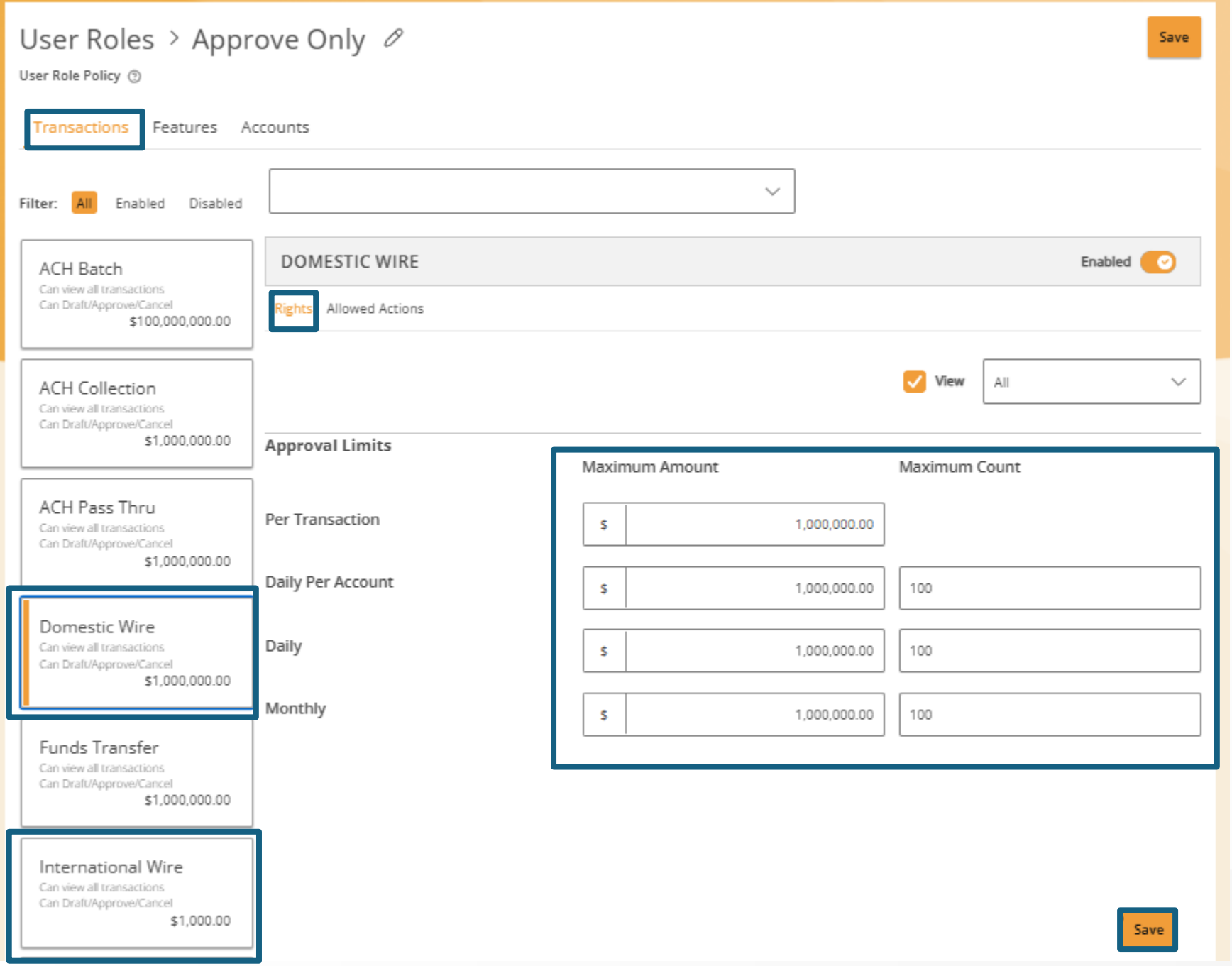
Example:
Create Only
Approve Only
Create and Approve

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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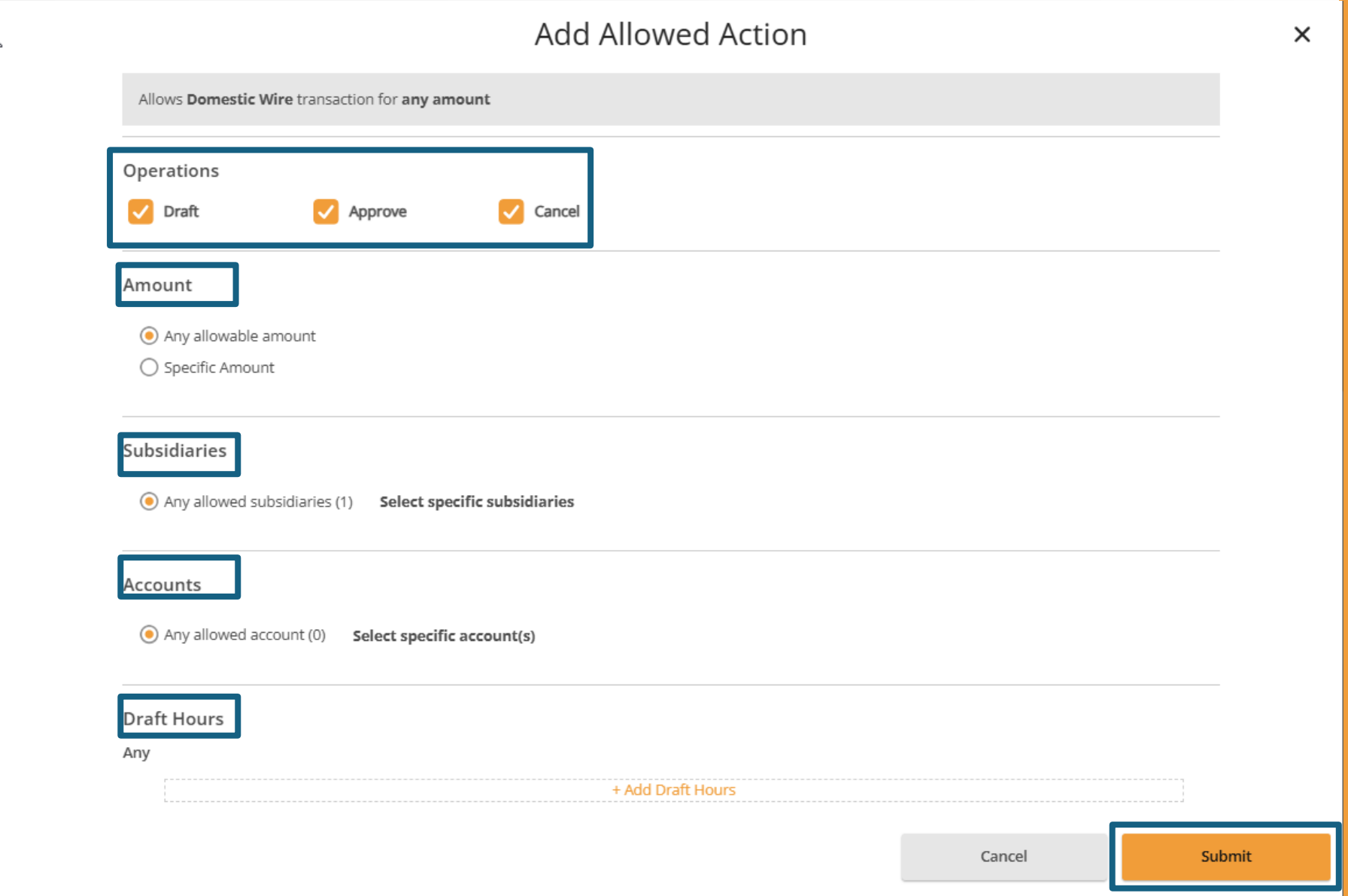
Domestic & International Wire Transactions

Select each wire type (Domestic and International, if applicable) individually to define the maximum transaction amount and transaction count limits.

Click **Save** once completed.

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

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User Role Policy:
Domestic Wire Transactions/ Allowed Actions

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, and Draft.

Click **Submit**.

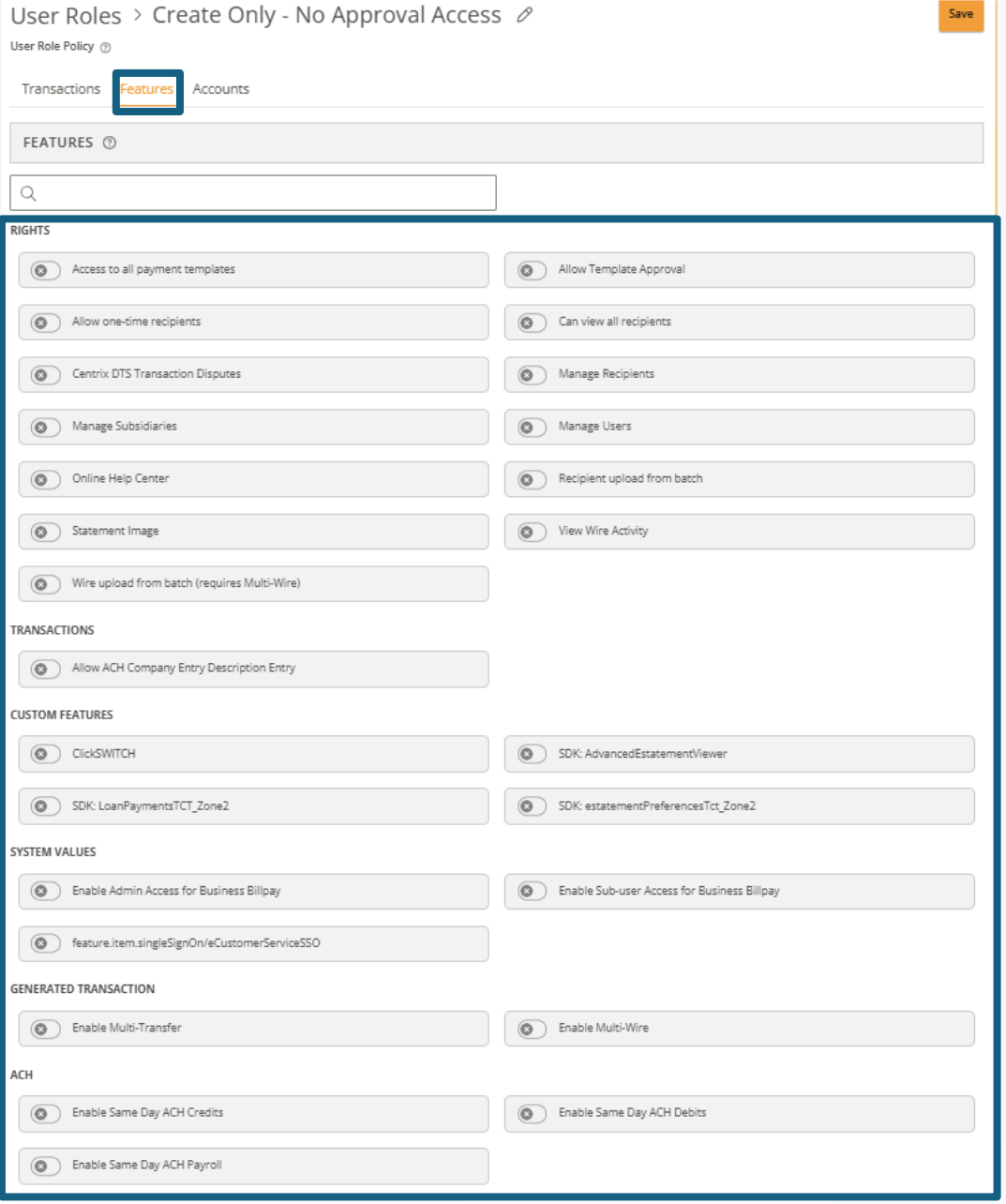
Note: adding "**Draft Hours**" will restrict after hours actions by type.

Leaving these sections as is would provide access to all hours.

Repeat these steps for **International Wires** if applicable.

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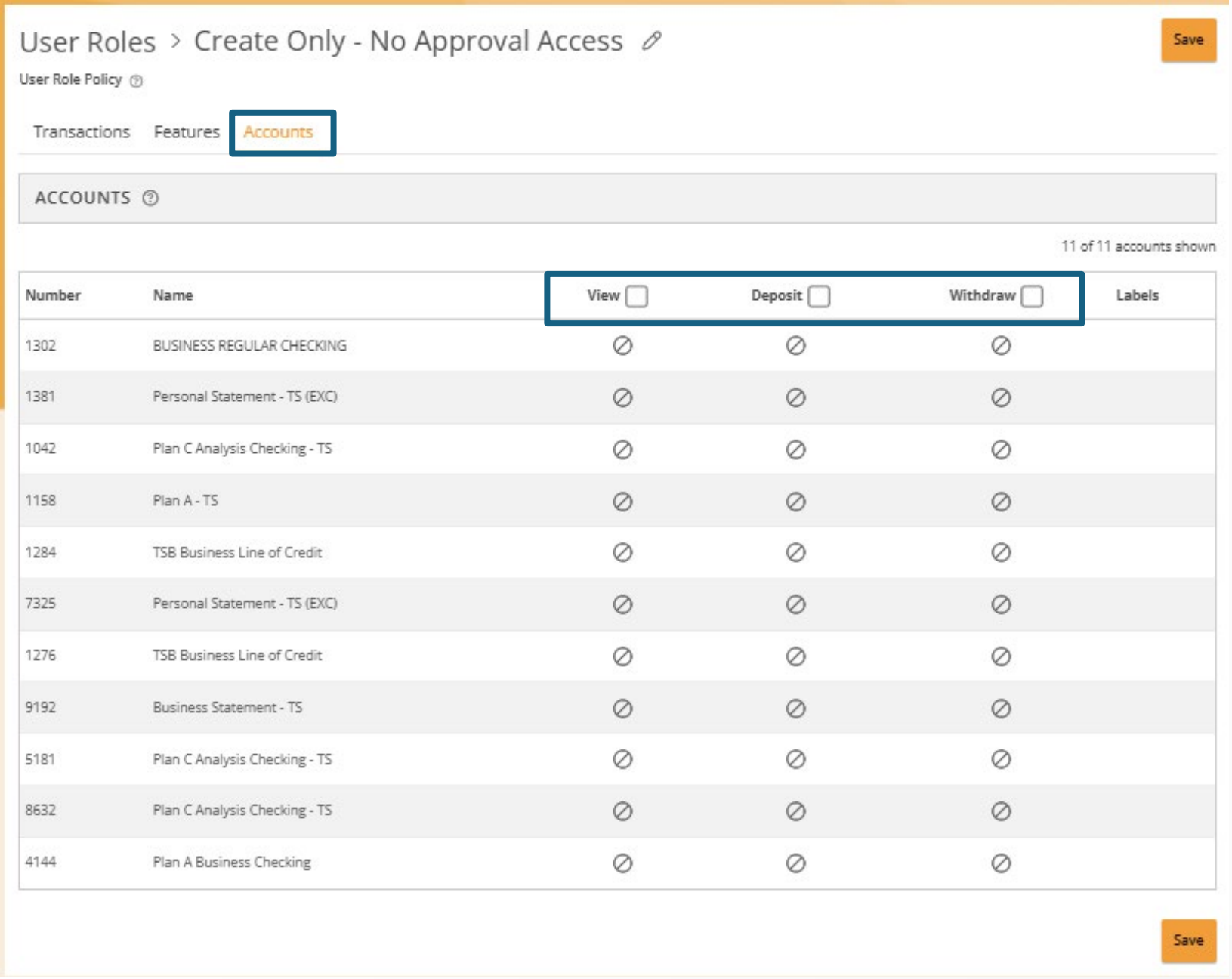
User Role Policy:
<u>Features</u>

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

Click **Save** once completed.

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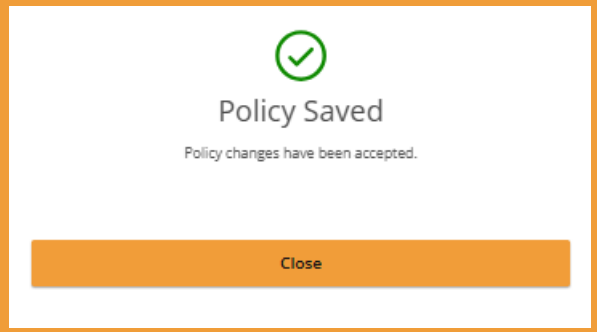
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User Role Policy:
Accounts

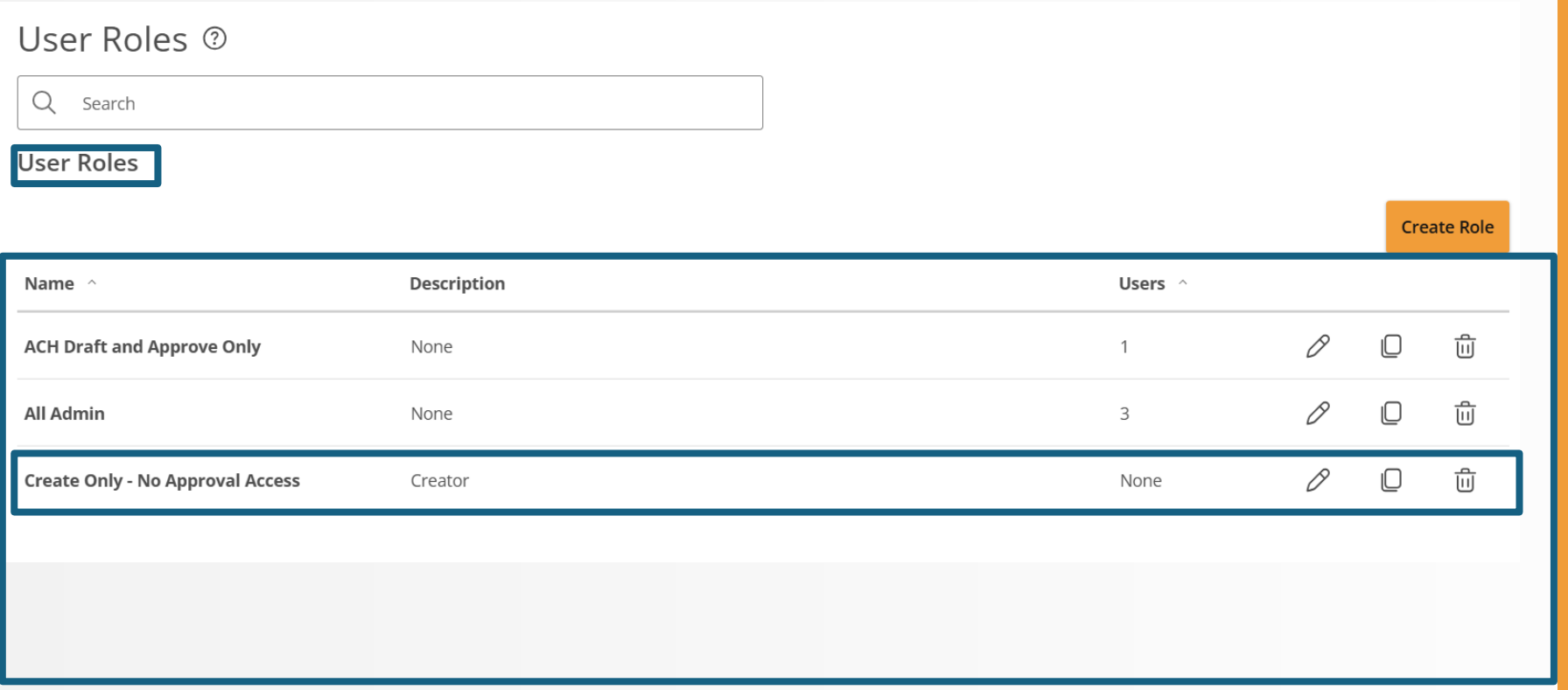
Determine what features apply for this role and which accounts they apply to. Review and confirm each section.

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



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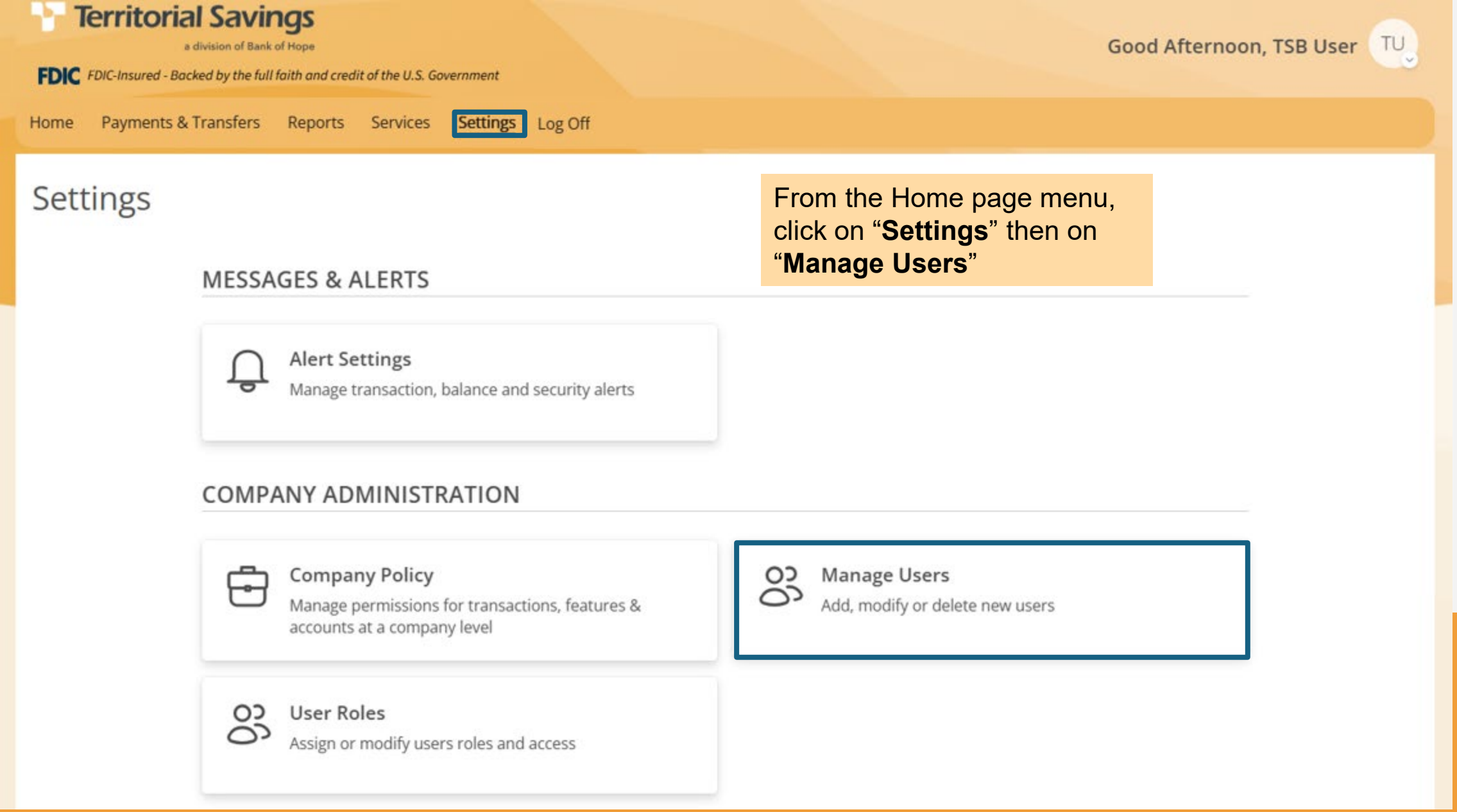


Validate User Roles
Confirm User Role was created by returning back to Settings then **User Roles** from the Home Page menu.

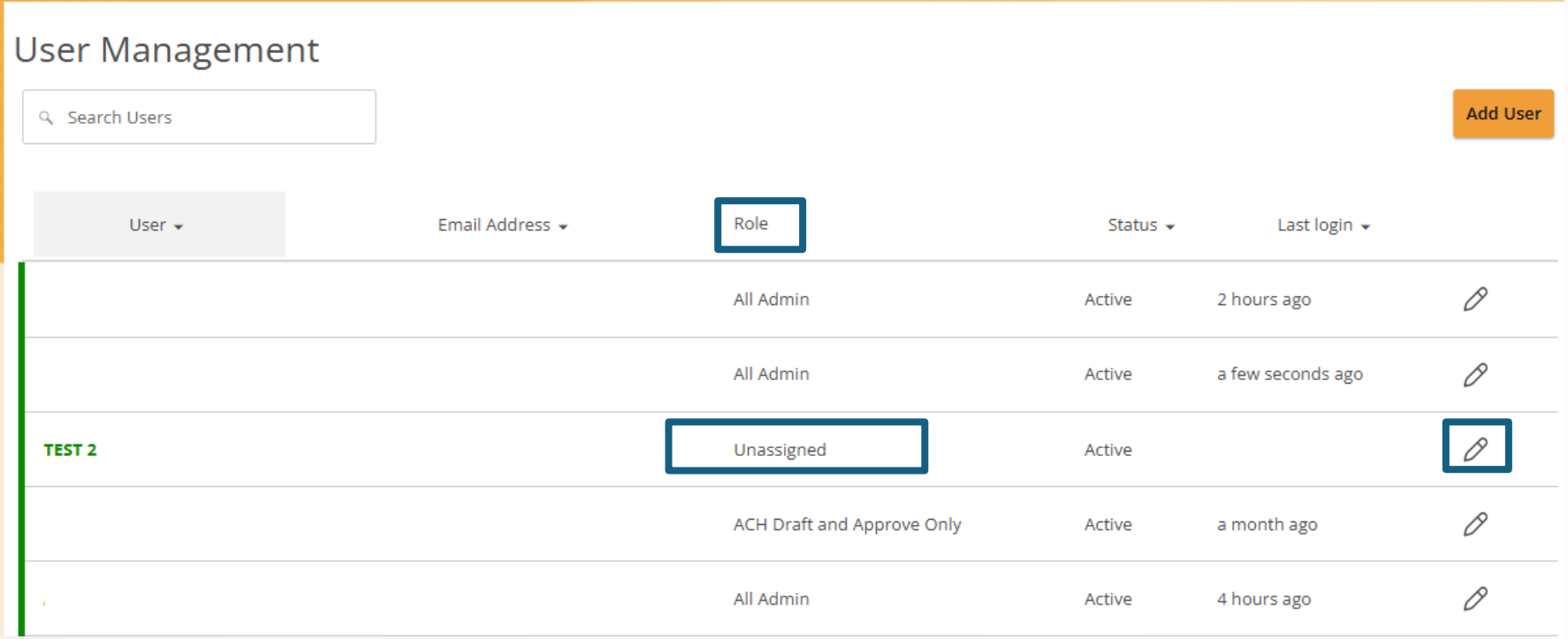
Currently no users are assigned this role. Return to **Manage Users** to assign this role.

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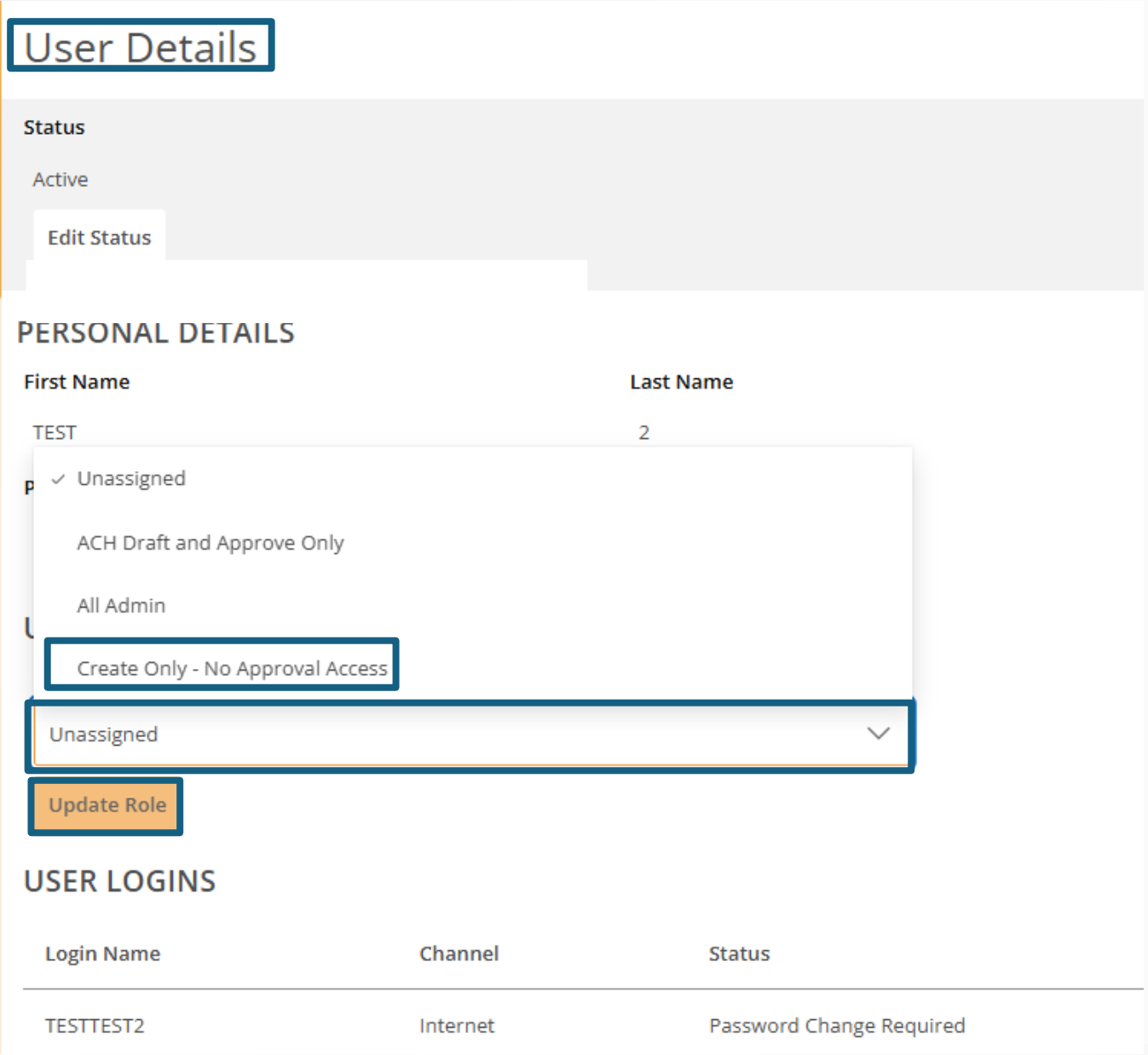


User Management

Update user with unassigned Role by clicking on the icon.

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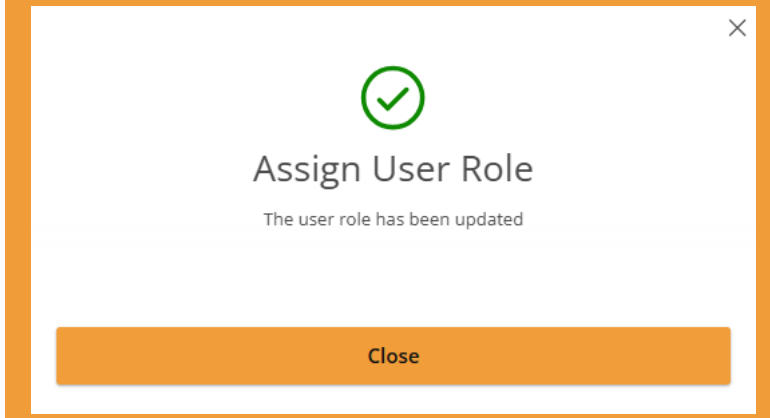
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User Management

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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