

CORPORATE USER MANAGEMENT

Company Administrators can set-up new users, create user roles, assign user rights, change, deactivate and delete users.

CORPORATE USER MANAGEMENT

CREATING NEW USERS

1. Select 'User Management' then 'User'. Note: Users can be viewed in a tile or listing format by selecting the appropriate icon above the 'Add User' box.

The screenshot shows the American Momentum Bank User Management interface. The sidebar menu on the left includes options like Home, Payments, Online Activity Center, eStatement, Services, User Management (expanded), User Roles, Company Policy, Settings, Reports, Messages, Locations, Help, and Log Off. The 'User Management' section is active, displaying a search bar, a 'Sort by' dropdown, and an 'Add User' button. A user card for 'Jane Doe' is shown with her email and last login time. Red arrows point to the 'User' menu item and the 'Add User' button.

2. Click the 'Add User' button on the right side of the screen.



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3. Enter the required fields for the new user.

Note: If the chosen user ID is already in use it will not allow you to save.

Note: Password assignment is temporary. User must login and change password within 72 hours before the password expires.

4. Click the 'Save' button on the bottom right hand corner of the screen.

5. Click 'User Roles' to 'Create Role' or change a current user role by selecting the pencil.

Note: The 'user roles' indicated will display as 'names' for users that you have created in the old Online Banking. You now have the ability to establish generic user roles that can be assigned to specific users. Examples include: Administrator, Payroll Clerk, Accounts Payable, Payroll. After creating a role, you can select the 'User' tab then select the pencil. You can then use the dropdown under 'User Role' to change the role. Make sure to select 'Update Role' after making your selection. You may assign multiple users to the newly created role.

6. If you are ready to assign rights to a user, click 'User Roles' then the pencil next to the user name. The transaction type available for your company will display from the 'Overview tab.

The 'New User' form contains the following fields and validation rules:

- First Name ***: Input field with 'John'. Validation: First Name should not exceed 25 characters.
- Last Name ***: Input field with 'Doe'. Validation: Last Name should not exceed 50 characters.
- Email Address ***: Input field with 'john.doe@email.com'. Validation: Login ID must be at least 1 characters long; Login ID must be no more than 50 characters long; Login ID contains invalid characters.
- Phone Country ***: Dropdown menu with 'United States' selected.
- Phone ***: Input field with '(555)123-4567'. Validation: Passwords do not match; Password must be at least 7 characters long; Password can be no more than 14 characters long; Password must contain a minimum of 1 number(s).
- Login ID ***: Input field with 'john.doe'.
- Password ***: Password input field with masked characters.
- Confirm Password ***: Password input field with masked characters.
- User Role**: Dropdown menu with 'Unassigned' selected. A red arrow points to this dropdown.

* - Indicates required field

Buttons: Cancel, Save

The 'User Roles' interface includes a search bar and a 'Create Role' button (indicated by a red arrow). Below is a table of user roles:

Name	Description	Users	Actions
Clerk	View only Accounts		[Pencil] [Trash]
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.	1	[Pencil] [Trash]

A red arrow points to the 'User Roles' menu item in the left sidebar, and another red arrow points to the pencil icon in the 'Users' column of the table.



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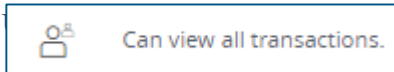
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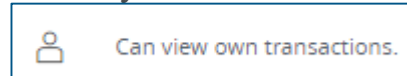
CORPORATE USER MANAGEMENT

7. After selecting the transaction type, 'Allowed Actions' will display. Select the 'Rights' tab, then the user's transaction rights by toggling the checkmarks on/off.
8. Click the 'Disable' function if the user should not have the right. If 'Enabled', select the appropriate option to adjust 'View Online Activity'.

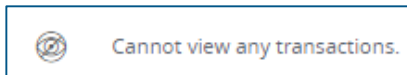
a) Can view transactions initiated by any online banking




b) Can only view the user's own transactions.









c) Cannot view any transactions.




User Roles ▸ Clerk  Delete i


View only Accounts

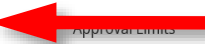
Overview Features Accounts



Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft Actions Max	Approve Actions Max	Cancel Actions Max	View
Stop Payment 			100	40	1 Any	1 Any	1 Any	
ACH Collection	\$1,000,000.00	40 / \$1,000,000.00	100 / \$1,000,000.00	40 / \$1,000,000.00	1 Any	1 Any	1 Any	
ACH Payments	\$1,000,000.00	40 / \$1,000,000.00	100 / \$1,000,000.00	40 / \$1,000,000.00	1 Any	1 Any	1 Any	
Transfer-Internal	\$999,999,999.99	9,999 / \$999,999,999.99	9,999 / \$999,999,999.99	9,999 / \$999,999,999.99	1 Any	1 Any	1 Any	
Wire-Domestic	\$1,000,000.00	40 / \$1,000,000.00	100 / \$1,000,000.00	40 / \$1,000,000.00	1 Any	1 Any	1 Any	

User Roles ▸ Q2Demouser  Delete i

Overview Features Accounts

ACH COLLECTION Change  Enabled

Allowed Actions Rights  Approval Limits

View Online Activity  Can view all transactions. 

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9. On the 'Approval Limits' tab, enter the user's transaction dollar and count limits.

NOTE: Repeat steps 5 - 8 for each transaction type.

10. Click on the 'Features' tab.

11. On the 'Features' tab, select the appropriate non-transactional features.

Allowed Actions Rights **Approval Limits** ←

MAXIMUM AMOUNT	Maximum transaction amount
Per transaction \$2.00 ✎	<input type="text" value="\$ 2.00"/>
Per Account Per Day \$2.00 ✎	1 2 3
Per Day \$2.00 ✎	4 5 6
Per Month \$1,000.00 ✎	7 8 9
MAXIMUM COUNT	Delete 0 Clear
Per Account Per Day 50 ✎	
Per Day 50 ✎	
Per Month 200 ✎	

Overview **Features** ←

FEATURES

CORPORATE

Information Reporting ✓	Manage User Roles ✓
Manage Company Policy ✓	

RIGHTS

View Wire Activity ✓	Access Incoming/Outgoing Wire Alerts ✓
Recipient upload from batch ✓	Wire upload from batch (requires Multi-Wire) ✓
Manage Templates ✓	Manage Users
Manage Recipients ✓	Allow one-time recipients ✓



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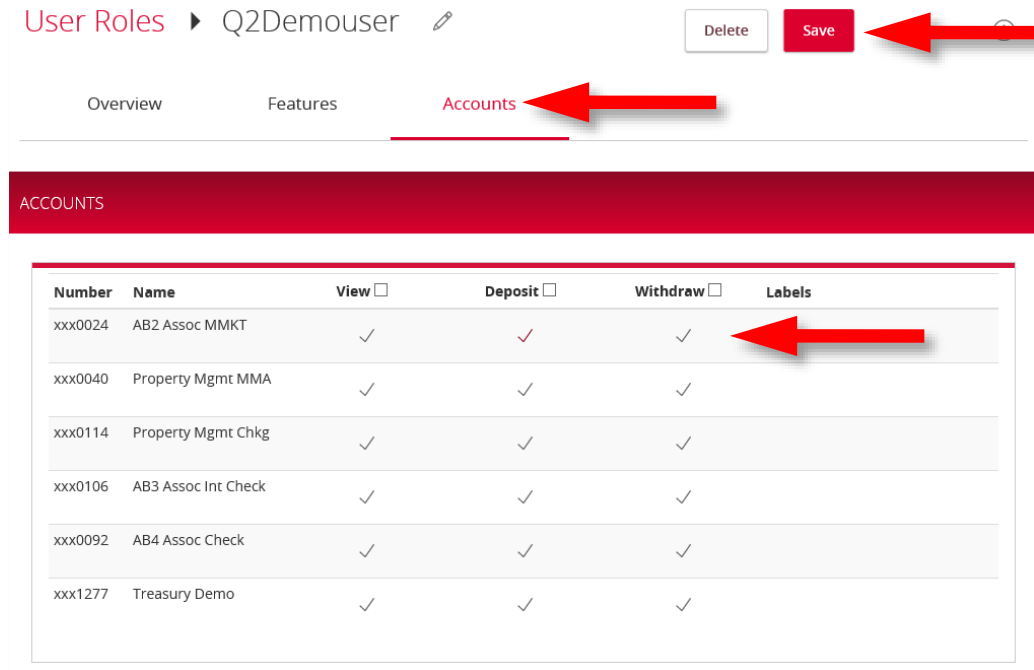
12. On the 'Accounts' tab, designate the user's account rights.


 Access is disabled, but can be enabled.

 Access is disabled for the company & cannot be enabled.

 Access is enabled.

13. Click the 'Save' button in the top right corner of the screen.



User Roles ▶ Q2Demouser  Delete Save

Overview Features **Accounts**

ACCOUNTS

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
xxx0024	AB2 Assoc MMKT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
xxx0040	Property Mgmt MMA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
xxx0114	Property Mgmt Chkg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
xxx0106	AB3 Assoc Int Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
xxx0092	AB4 Assoc Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
xxx1277	Treasury Demo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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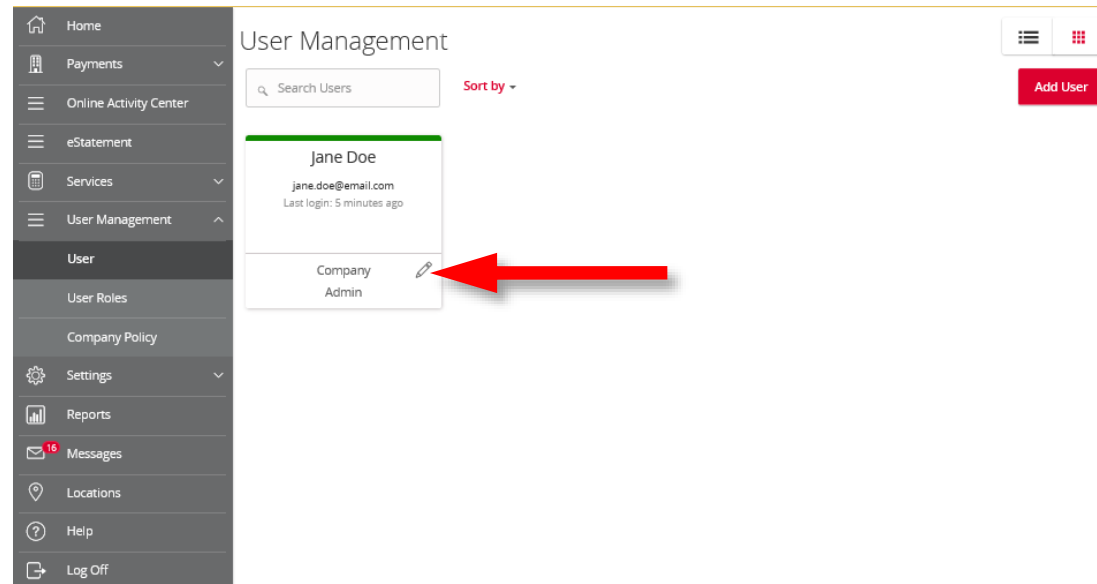
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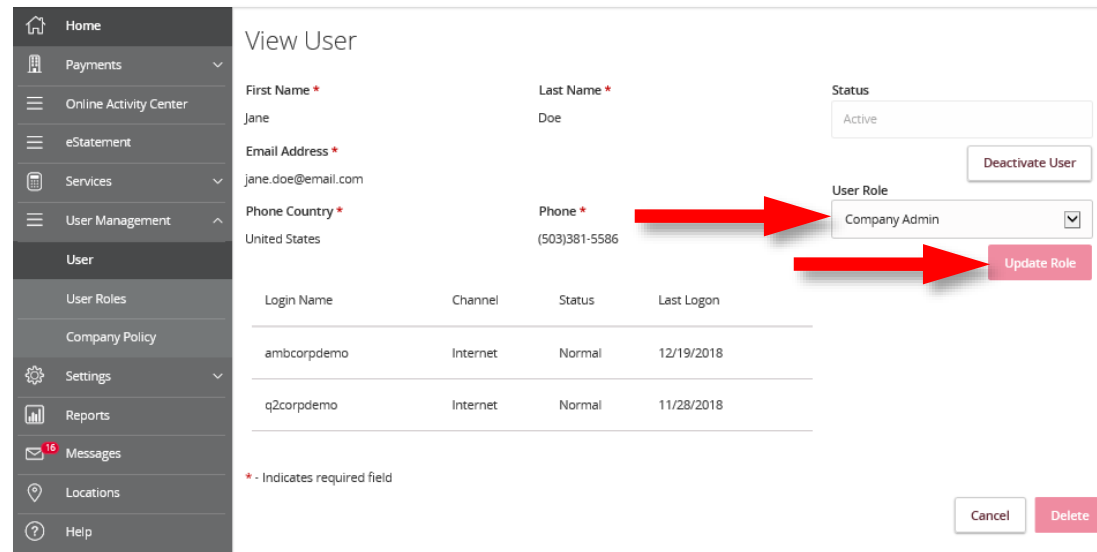
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MAINTAINING EXISTING USERS

1. From the 'User' tab, click the pencil icon to edit the existing user. If you have the appropriate user rights, you can deactivate the user (does not delete user), update user roles or permanently 'delete' the user. Note: You cannot 'deactivate' or 'delete' your own user or role.
2. Use the drop down for 'User Role' to update role.
3. Follow steps 5-10 in the 'Creating New Users' section above.



The screenshot shows the 'User Management' page. On the left is a navigation menu with 'User' selected. The main content area displays a user card for 'Jane Doe' with email 'jane.doe@email.com' and 'Last login: 5 minutes ago'. Below the card, the role is listed as 'Company Admin'. A red arrow points to a pencil icon next to the role, indicating the edit function.



The screenshot shows the 'View User' page for Jane Doe. Fields include First Name (Jane), Last Name (Doe), Email Address (jane.doe@email.com), Phone Country (United States), and Phone ((503)381-5586). The Status is 'Active' and the User Role is 'Company Admin'. A red arrow points to the 'Update Role' button. Below these fields is a table of login attempts:

Login Name	Channel	Status	Last Logon
ambcorpdemo	Internet	Normal	12/19/2018
q2corpdemo	Internet	Normal	11/28/2018

At the bottom, there are 'Cancel' and 'Delete' buttons. A note states '* - Indicates required field'.



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