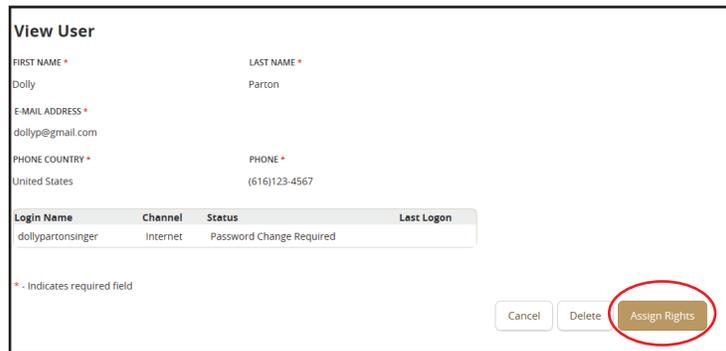
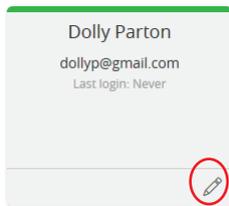
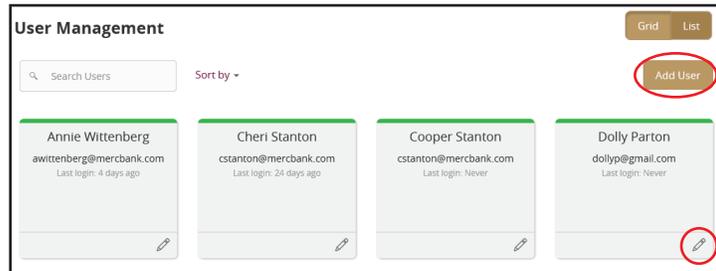


Manage Users



After logging in, within the Commercial section of the left menu, choose User Management.

If the recipient you need is not listed, choose *Add User* from the top. If a user needs to be edited or removed, you would also do that from this screen by selecting the pencil.



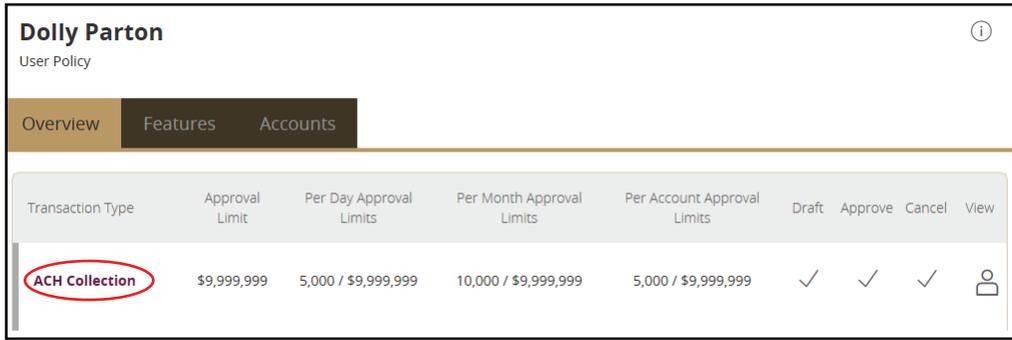
Assign Rights

User rights refers to the account access given to each employee. For each account, you can specify which functions a user is allowed to access, and the monetary limits placed on the user for that account. Functions and limits can vary between accounts, so a user might be granted full access to all functions on one account, but not be able to access another account at all.

Once a user is added, you must establish User Rights in order for them to access any accounts. You will automatically be directed to the User Management screen after adding a user to Assign Rights.

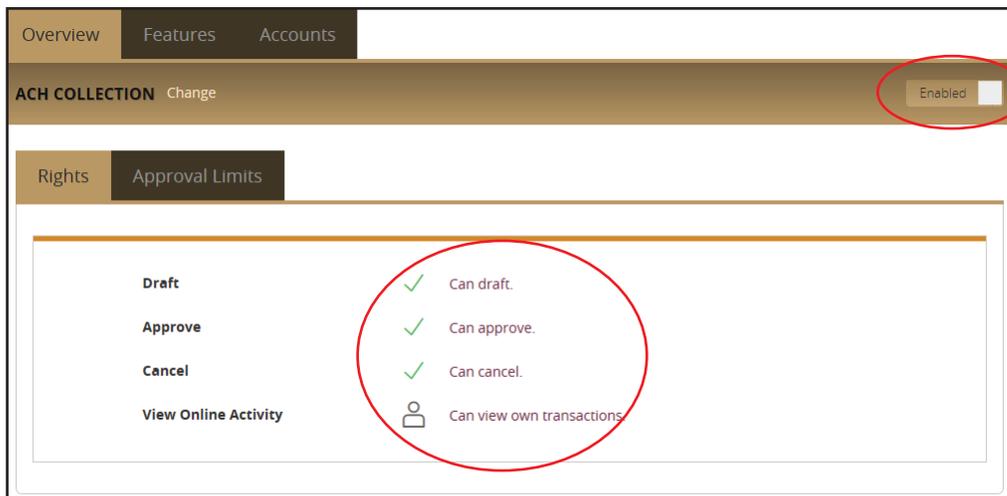
User Management - Overview

The *Overview* tab shows all of the rights that particular user has and any limits. To make any changes to those rights, you can click on the applicable item/transaction type to make changes.



Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
ACH Collection	\$9,999,999	5,000 / \$9,999,999	10,000 / \$9,999,999	5,000 / \$9,999,999	✓	✓	✓	

Within the top bar for the transaction type (ACH Collection in this example), you can click to Enable or Disable rights. Once enabled, there are 4 options to enable or disable.

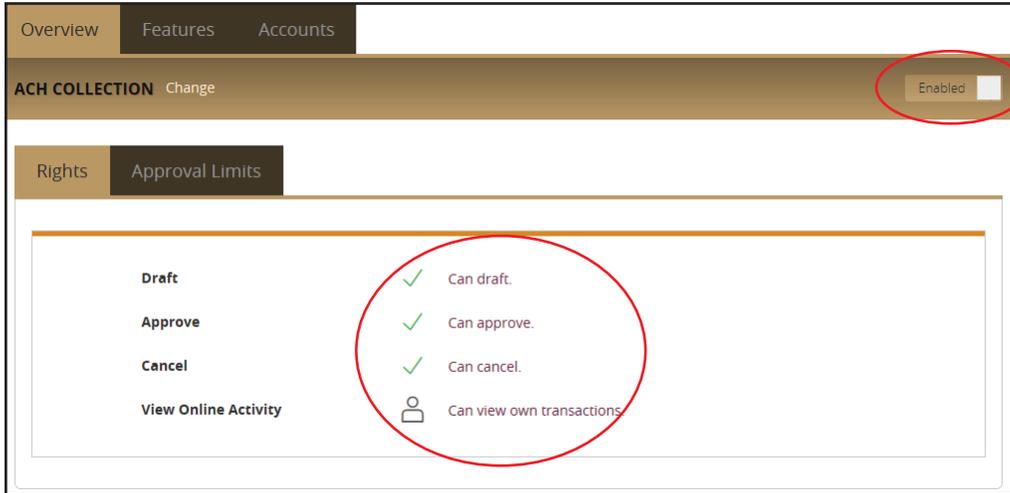


ACH COLLECTION [Change](#) Enabled

Rights | **Approval Limits**

- Draft** ✓ Can draft.
- Approve** ✓ Can approve.
- Cancel** ✓ Can cancel.
- View Online Activity** Can view own transactions

User Management - Overview



Draft- Can Draft

Initiate or create a transaction of the specified type.

Draft- Cannot Draft

This setting restricts a user's rights to editing the dollar amount, settlement date, and description of an existing template. All other required data will be pre-populated when a user accesses a draft-restricted template.

Approve

Approve or authorize a transaction of the specified type.

Cancel

Cancel a transaction of a specified type that is currently in a *Drafted* status or *Authorized* status.

View Online Activity

View Online Activity has three levels of available access: *Single User*, *Multiple Users*, or *None*. Setting the option to *Single User* gives the specified user the ability to only view the online transactions that he or she has initiated. Setting the option to *None* removes complete access to the Online Activity page under the Accounts menu. Setting the option to *Multiple Users* enables the user to view not only his or her own online transactions, but those initiated by others within the company. The *Multiple* setting will probably be limited to Supervisors. The *Multiple* option must also be checked when setting up a user for Mobile Authorizations.

NOTE: For a user to be able to draft a transaction, but not approve, they must be given the right to withdraw from the account. If the Withdraw option within the Accounts tab is not selected, the user will not be able to view any accounts to draft a payment.

User Management - Approval Limits

Approval Limits are values the user is limited to when creating a transaction of the specified type. For example, if the Per Transaction Limit is set to \$1,000.00 for Funds Transfers, the user will not be permitted to initiate a transfer in excess of \$1,000.00. In the event that the user attempts a transfer that exceeds this limit, an error message will appear indicating that they have exceeded the Per Transaction Limit and the transfer will not be accepted. There are certain types of transactions that do not require certain limits to be set: examples are Stop Payments and Check Reorders.

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User Policy

Overview Features Accounts

ACH COLLECTION Change Enabled

Rights Approval Limits

MAXIMUM AMOUNT	Maximum transaction amount
PER TRANSACTION \$9,999,999	\$ 9,999,999
PER ACCOUNT PER DAY \$9,999,999	
PER DAY \$9,999,999	

Limits supported, depending on the type of transaction, include:

Per Transaction Limit (\$)

The maximum dollar amount a user can approve per transaction.

Per Day Limit (\$)

The maximum dollar amount a user can approve per day.

Per Month Limit (\$)

The maximum dollar amount a user can approve per month.

Per Account Per Day Limit (\$)

The maximum dollar amount a user can approve per day per account, for accounts to which they are entitled.

Per Day (count)

The maximum number of transaction approvals allowed per day.

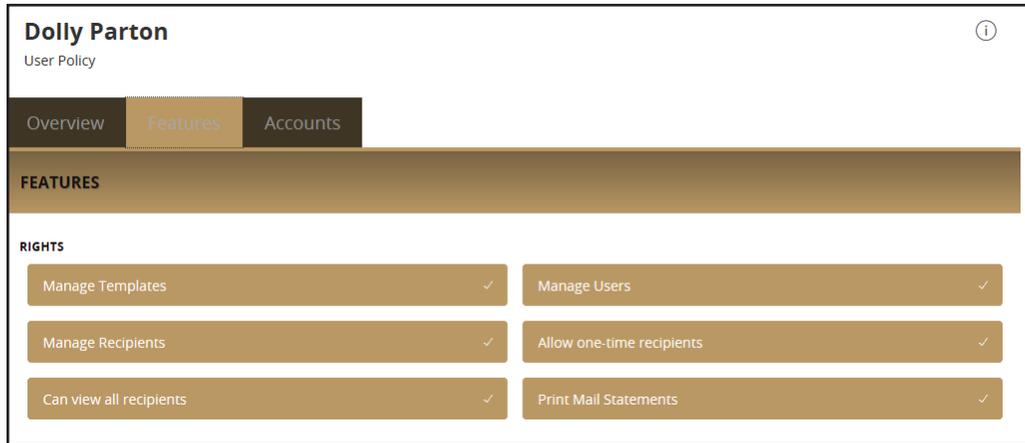
Per Month (count)

The maximum number of transaction approvals allowed per month.

Per Account Per Day (count)

The maximum number of transaction approvals allowed per day per account, for accounts to which they are entitled.

User Management - Features



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User Policy

Overview Features Accounts

FEATURES

RIGHTS

Manage Templates ✓	Manage Users ✓
Manage Recipients ✓	Allow one-time recipients ✓
Can view all recipients ✓	Print Mail Statements ✓

Limits supported, depending on the type of transaction, include:

Manage Templates

As a default, users only have access to view/edit/delete templates they have created. Enabling the Manage Templates option gives a user the ability to see and manage all templates for all users within the company.

Manage Recipients

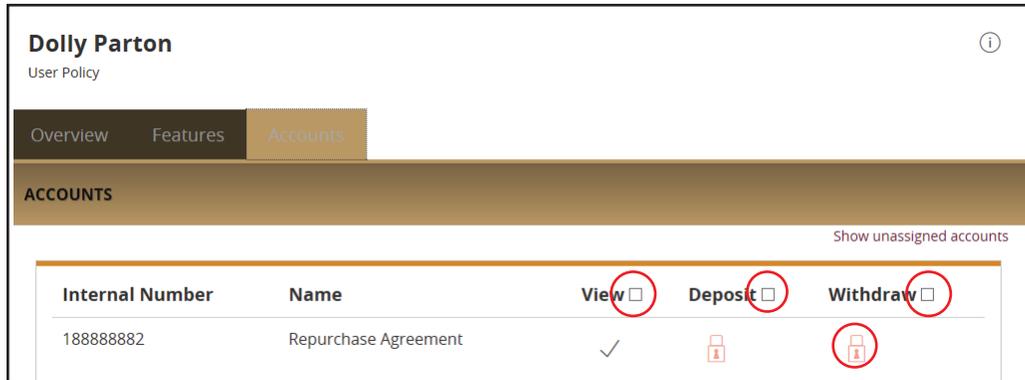
Granting users the ability to Manage Recipients will enable them to edit/add/delete a recipient for use in Payroll, ACH Payments, ACH Receipts, Wire Transfers, and Tax Payment transactions. Without this option they will only have the ability to utilize recipients that have been created by a Supervisor.

Manage Users

Enabling this option will allow the user access to the *User Rights* page. The user will have the ability to alter permissions and limitations for all users within the company.

NOTE: Users set up as an administrator will only be able to access and view those transactions, accounts, templates, and recipients that you grant them while you are setting them up under Preferences and User Rights.

User Management - Accounts



The *Accounts* tab allows you to set account access levels for each account available to the specified user. To enable or disable any of these features for all users, you can select the check box next to the title.

The options for account access rights are:

View View balance and history information for the specified account. If a user is denied View rights on an account, he or she will not have access to that account in the online banking system. The View right can also be used to hide certain accounts that the user doesn't need or want to view.

Deposit Make deposits to this account via Funds Transfer, ACH Collections, etc.

Withdraw Make withdrawals from this account via Funds Transfer, Payroll, ACH, Wire Transfers, etc.

The padlock icon signifies that the option is not available - usually due to the account type. It is something established by the bank.