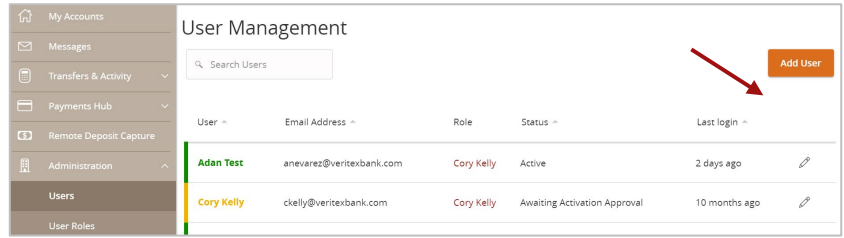
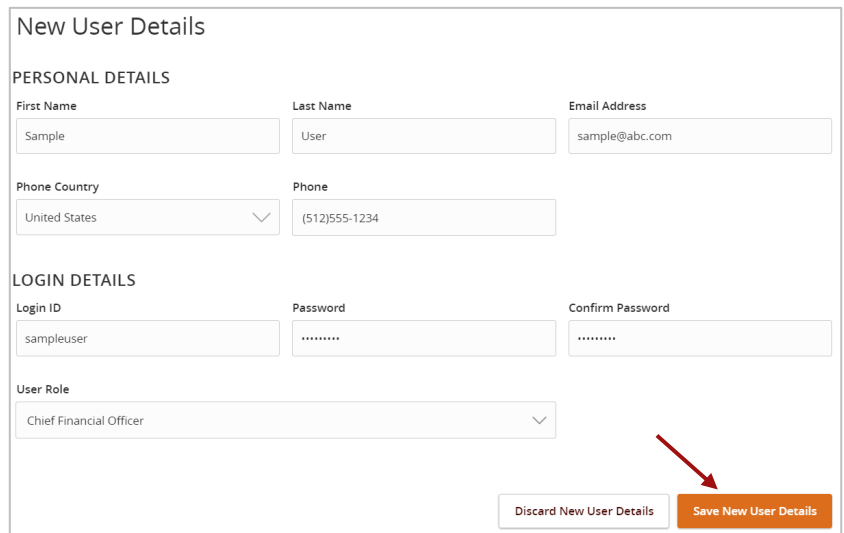


Creating New Online Users

1. Select the 'Users' option under the 'Administration' menu.
2. Click the 'Add User' button to add a new online banking user.
3. Enter all fields on the form. Login ID and Password requirements are listed on the right side of the screen.
4. Assign a User Role to the user.
5. Click the 'Save New User Details' button when done.
6. For added security you will be prompted to enter a Secure Access Code or Symantec Token code (if applicable).

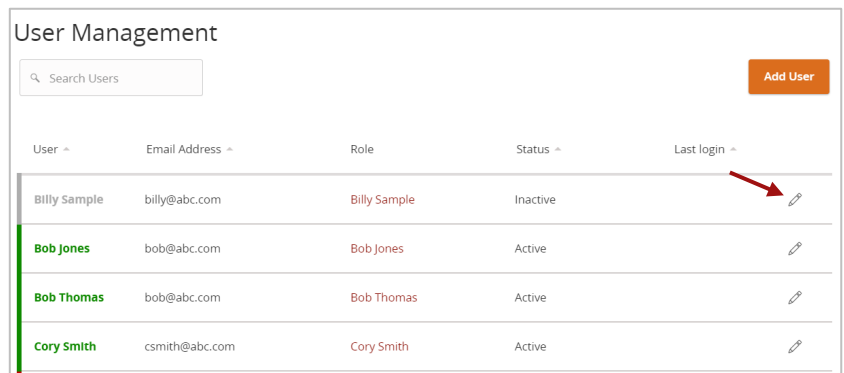
NOTE: If the new user requires entitlements different than any existing user role, copy an existing user role, make the necessary changes and then assign to the new user.

The screenshot shows the 'New User Details' form. It is divided into 'PERSONAL DETAILS' and 'LOGIN DETAILS' sections. The 'PERSONAL DETAILS' section includes fields for 'First Name' (Sample), 'Last Name' (User), 'Email Address' (sample@abc.com), 'Phone Country' (United States), and 'Phone' ((512)555-1234). The 'LOGIN DETAILS' section includes fields for 'Login ID' (sampleuser), 'Password', and 'Confirm Password'. A 'User Role' dropdown menu is set to 'Chief Financial Officer'. At the bottom right, the 'Save New User Details' button is highlighted with a red arrow.

Existing Online Users

1. Click the pencil icon next to an existing user to be updated.



- 2. Click 'Edit Status' to deactivate or reactivate an online user.

User Details

Status
Active
[Edit Status](#)

PERSONAL DETAILS

First Name	Last Name	Email Address
Bob	Jones	bob@abc.com
Phone Country	Phone	
United States	(812)566-6666	

- a. Click 'Deactivate User' to disallow a user from logging in without completely deleting the user.
- b. Click 'Activate User' to reactivate an online user.

Status
Active


Status
Inactive

- 3. Click the 'User Role' drop down menu to update the 'User Role' for a user. Click 'Update Role' upon completion. Note: The user role update will go into effect the upon the user's subsequent logon after the change has been made.
- 4. Click the ellipses (vertical dots) to unlock an online user.

USER ROLE Manage User Roles

Current Role

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
-bobjones123	Internet	Password Change Required		

NOTE: The ellipses will only be clickable beside a locked user.

- 5. Click the 'Delete' button to delete the online user.