Managing User Roles
Online Banking User Guide

The Online Banking solution enables streamlined user management through user roles. A user role is a set of permissions assigned to a user. A user role provides predefined entitlements and policy rights which allow an Administrator to easily define user action and activities within the solution. This includes creating, editing, deleting, and approving transactions. Each online banking user must have a user role.

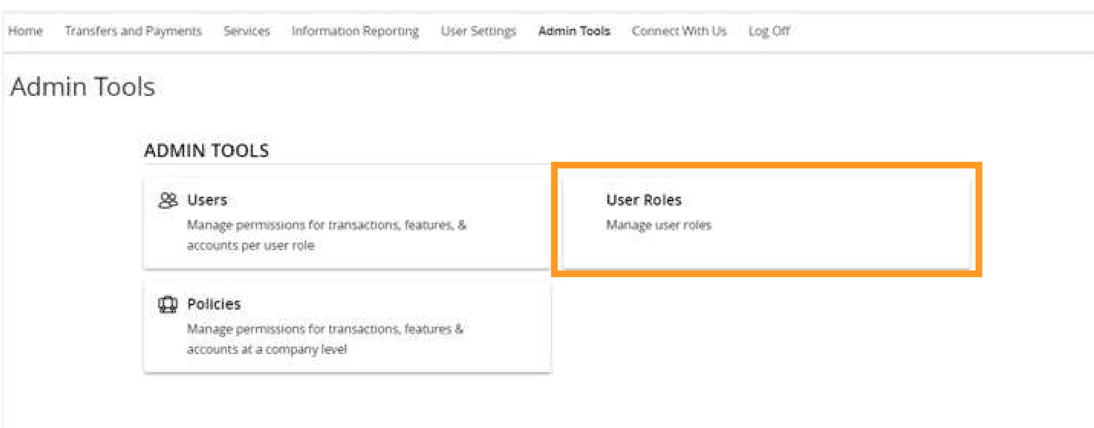
Managing User Roles

You can manage user roles by creating new user roles or copying and editing existing roles. The User Roles page contains a list of all your organization’s user roles.

Creating a New User Role

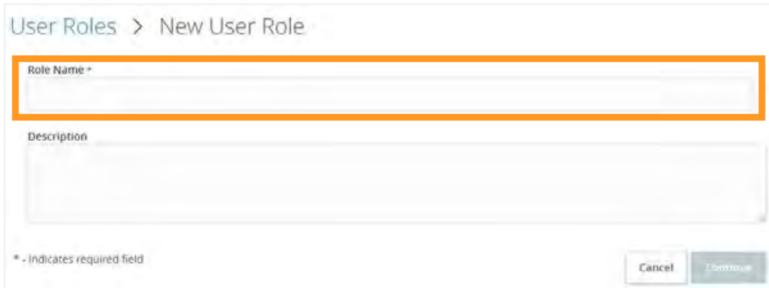
To create a new User Role:

1. In the navigation, select Admin Tools > User Roles tile



2. Select Create Role.

3. Enter the Role Name.



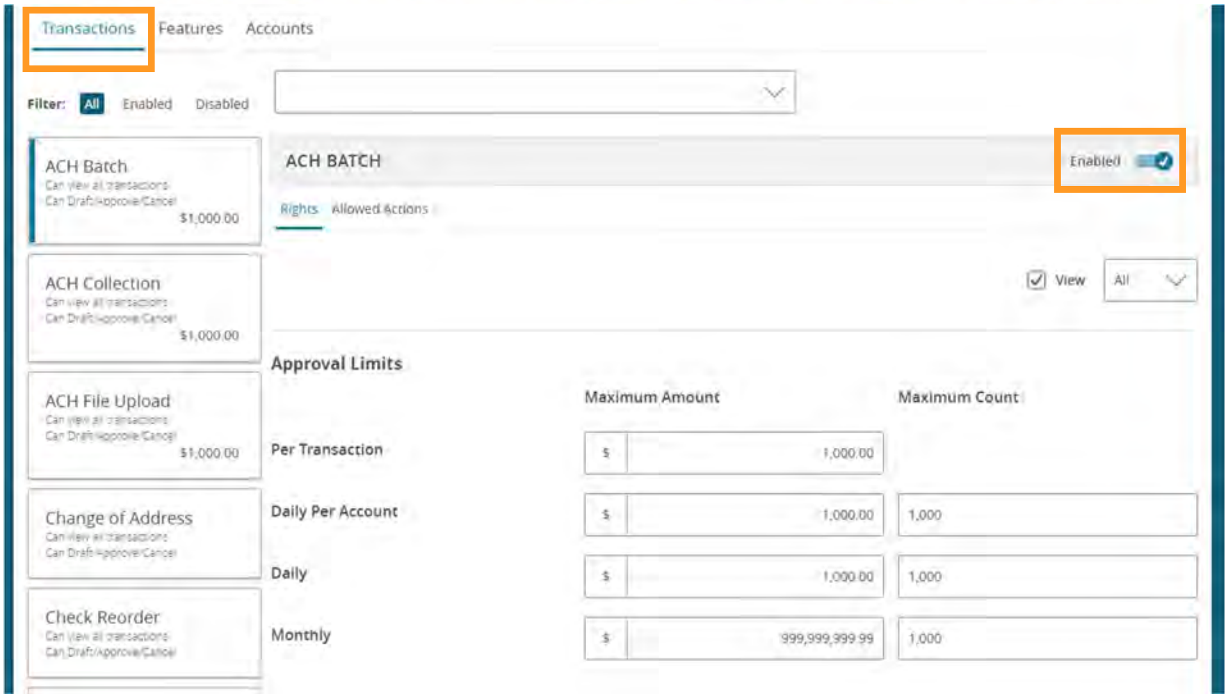
4. Enter the Description (Optional).
5. Select Continue. The Policy Saved page confirms the policy changes.
6. The new User Role is now available. If you want to make changes to the rights and entitlements, see the next section about assigning rights to a User Role. If you are satisfied with the rights and entitlements, select Close.

Assign transactions, features and accounts to a User Role:

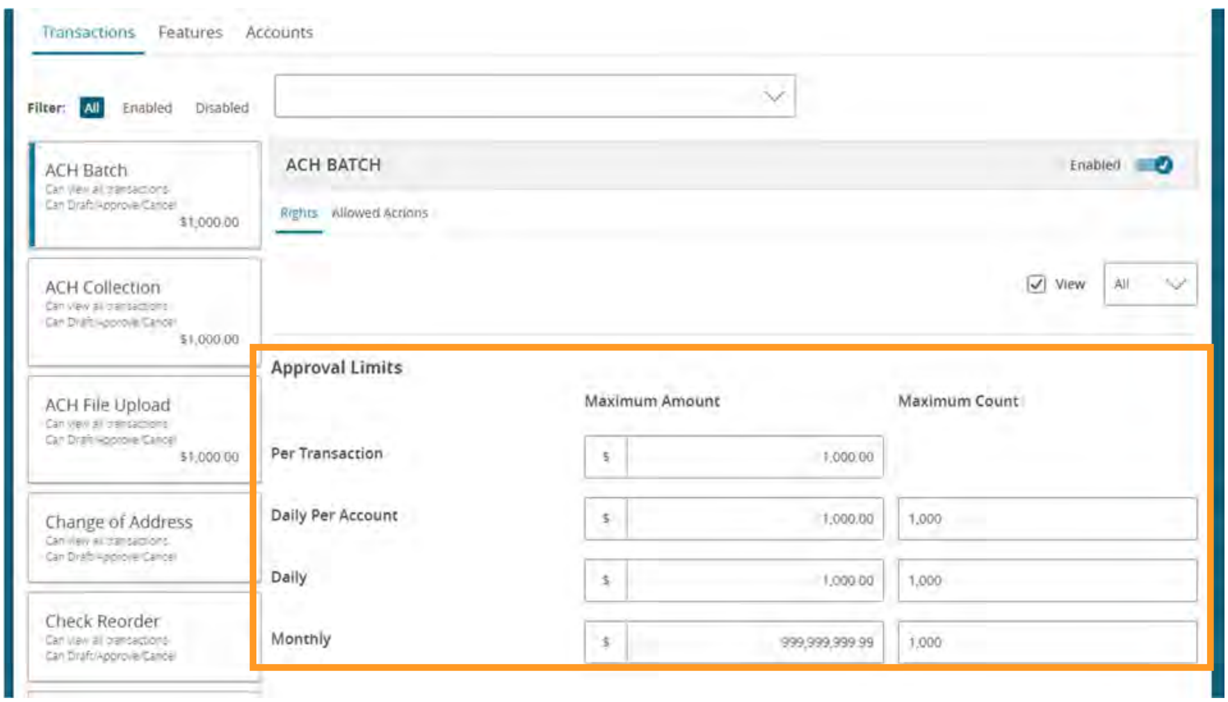
To assign transactions and rights to a User Role:

1. In the navigation menu, select Admin Tools > User Roles tile.
2. Locate the User Role.

3. Select the edit icon ().

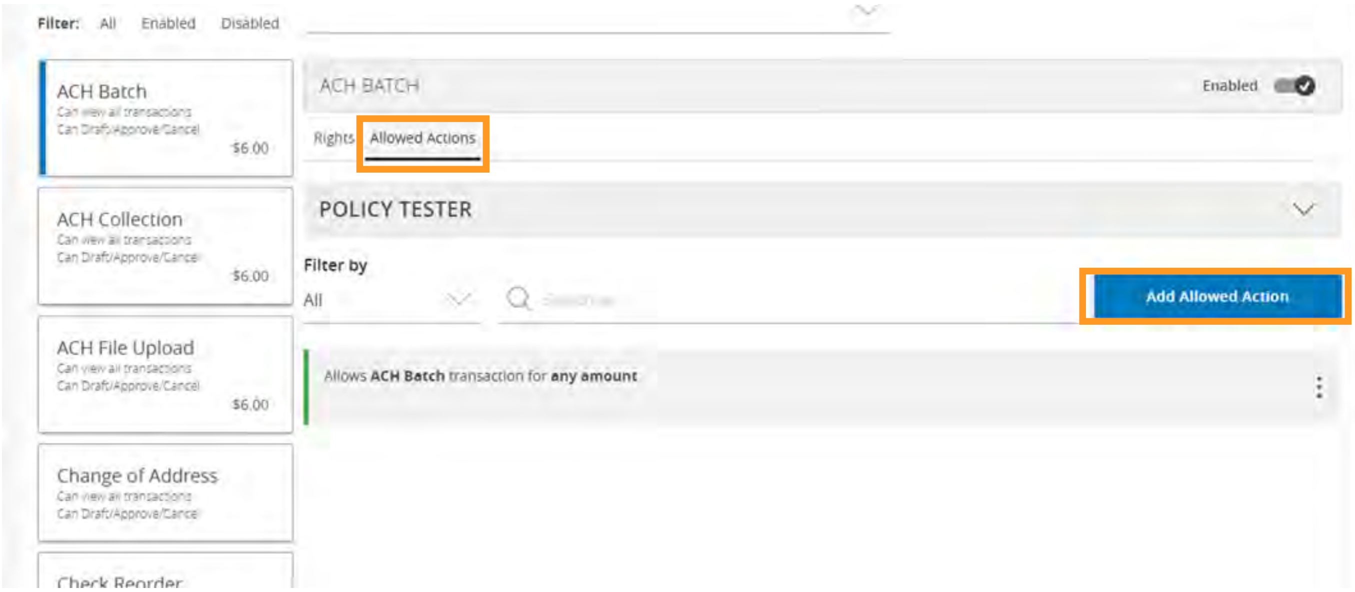


4. Click the Transaction tab.
5. Select a transaction type. Ensure the transaction is enabled indicated in blue with a check mark.

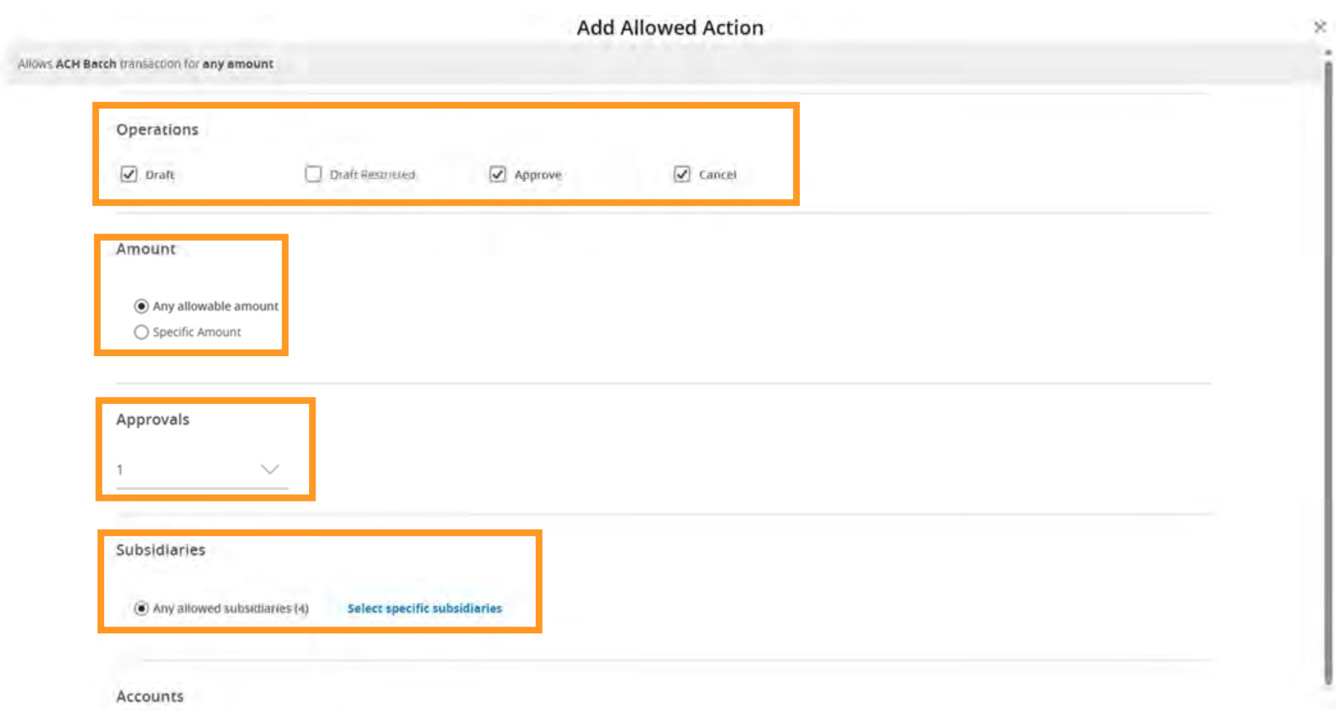


6. Enter the Maximum Amount and Maximum Count to set the Approval Limits under Rights for the role.

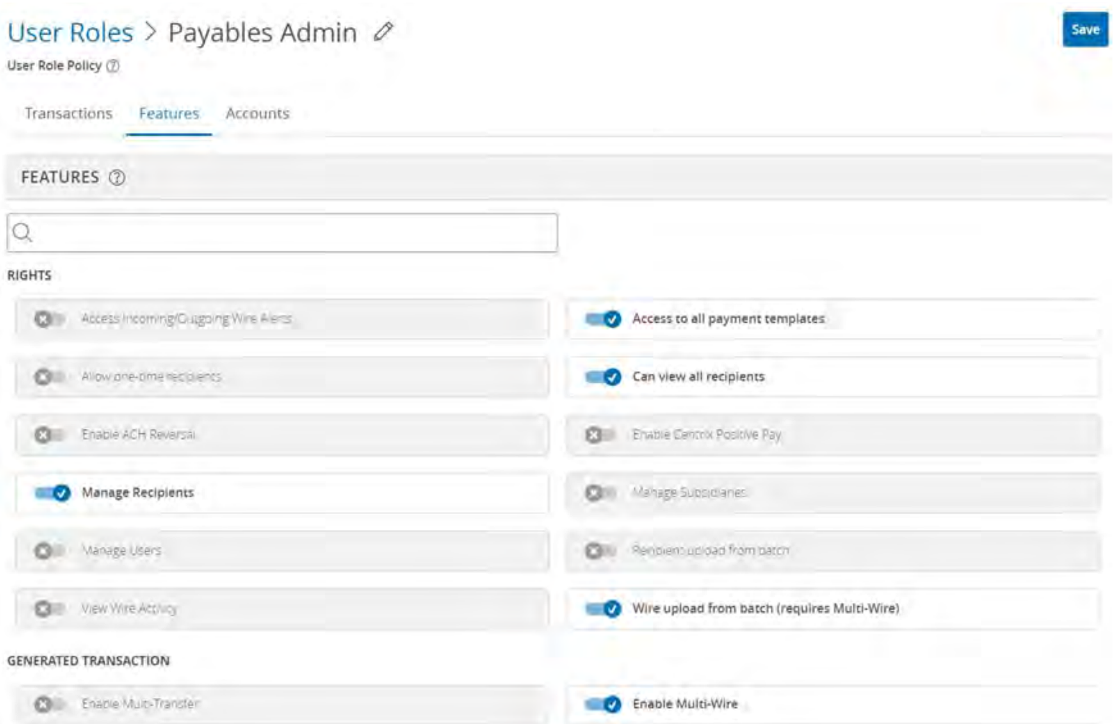
7. Select the Allowed Actions tab for ACH Batch and click on Add Allowed Action



8. Set the Operations, Amount, Approvals and Subsidiaries desired.



9. Select the Features tab.

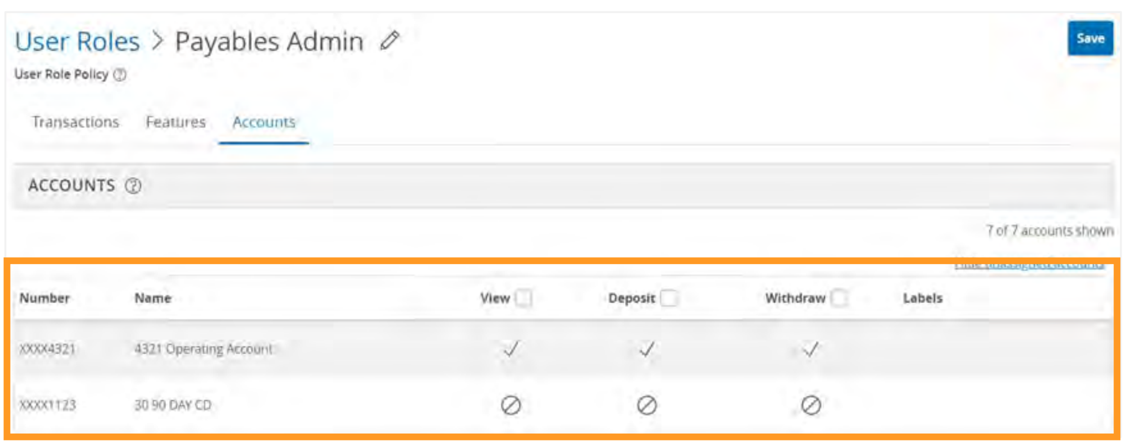


10. Select Rights to enable or disable by toggling the slide. Enabled will display as blue with a check mark.

11. Click Save.

12. Click the Accounts tab.

13. Select View, Deposit and Withdraw by clicking on the icon under each column.

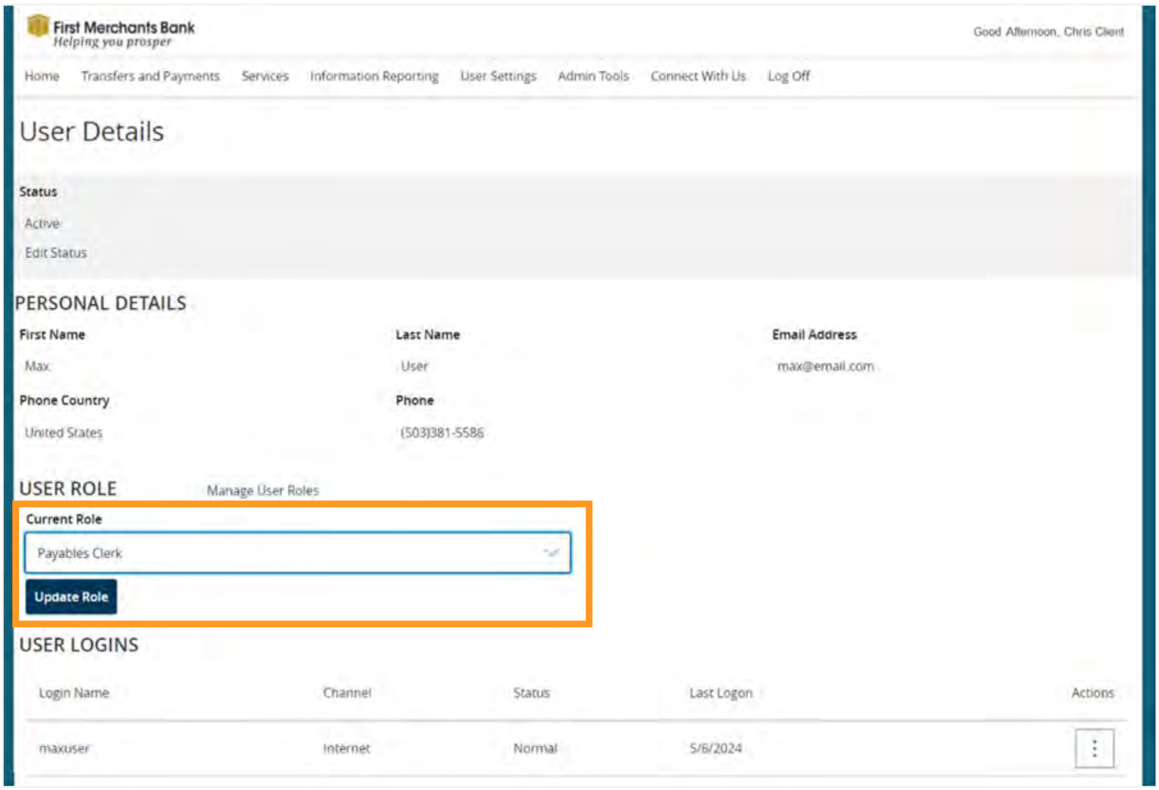


14. Click Save.

Adding a role to a User

To add a role to a user:

1. In the navigation menu, select Admin Tools > Users tile.
2. Search for the user.
3. Select Edit (✎). The User Details page appears.



4. Under User Role, use the Current Role drop-down menu to view all available roles.
5. Select the role name to assign a new role.
6. Click Update Role.