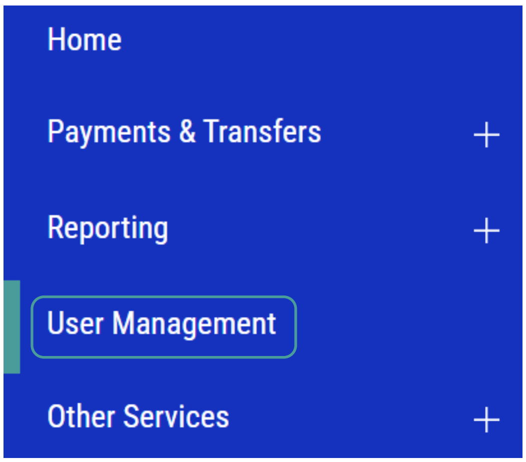
Corporate Services

Quick Reference Guide - User Management

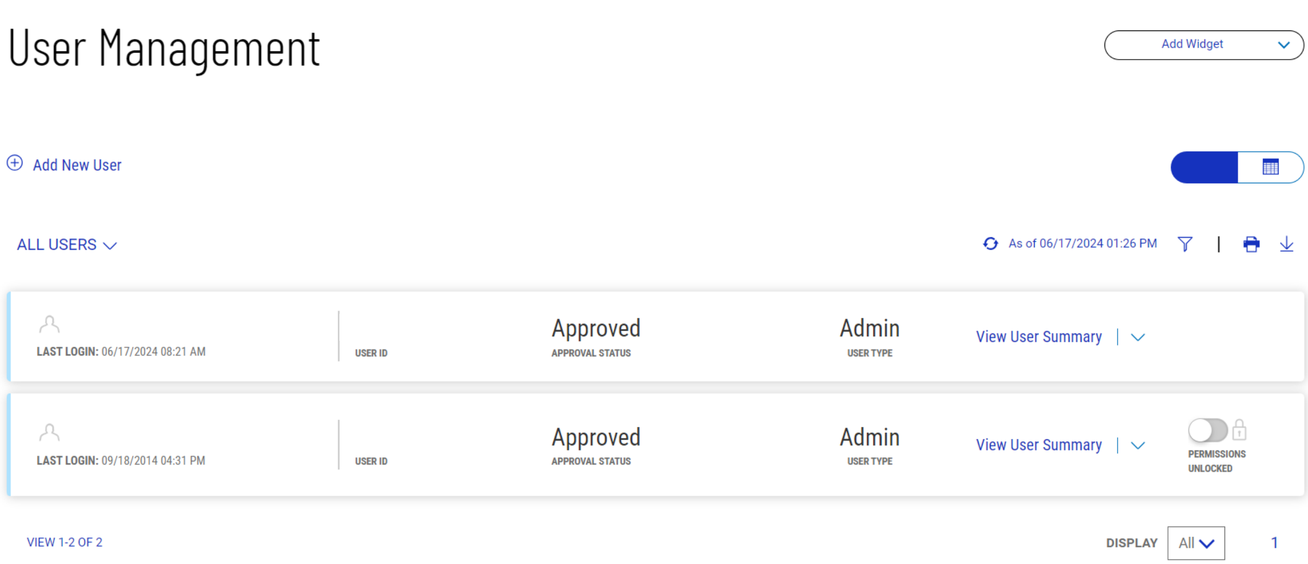
For corporate administrative users, the User Maintenance widget on the User Management workspace provides you the tools to view, add, update, lock and unlock users in your company. The Audit Report widget on this workspace provides you the audit trail of user activities of all users in your company.



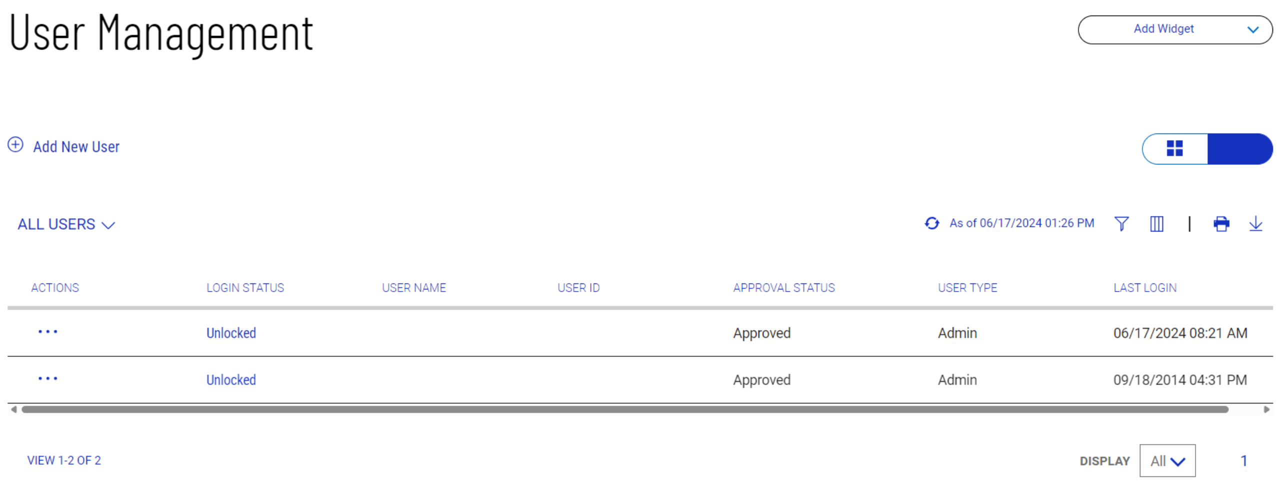
USER MAINTENANCE

The User Maintenance widget is pinned to the workspace. You have the option to toggle between a list view or a tile view of the User Maintenance widget. Both views provide a summary of all users, a link to add new user, a single-click ability to lock or unlock a user, the ability to modify a user's permission and the ability to view detailed user information:

Tile View:



List View:



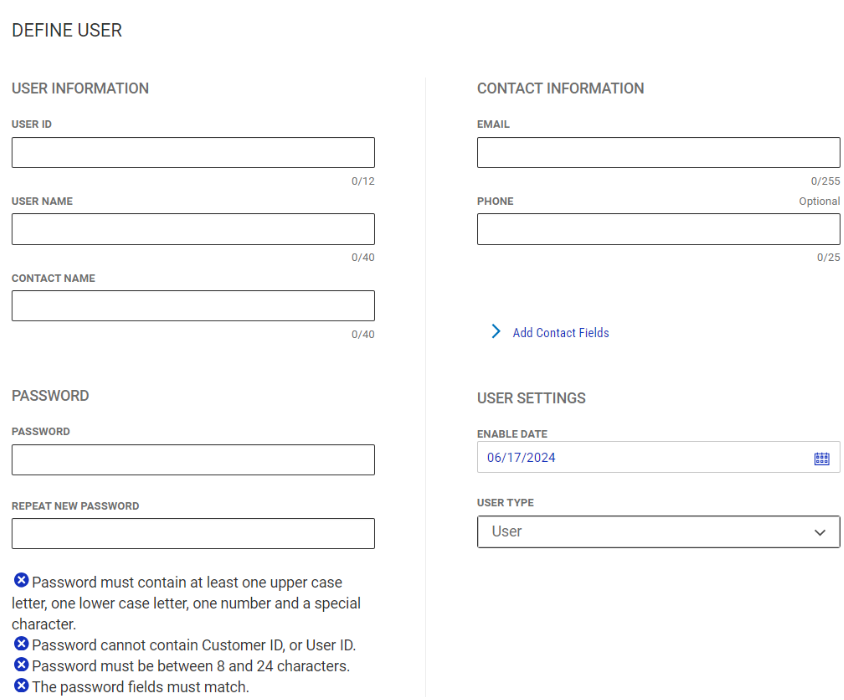
As with standard capabilities, the list view(s) in User Maintenance can be personalized by you – sort data in a column, display desired columns, arrange order of columns and filter data. You can save multiple personalized views for later use. Data can be printed and exported.

ADD A NEW USER

From the Add New User link of either the list view or the tile view:

Follow the workflow that guides you through – defining user information, permissioning services and accounts, assigning limits (if required), then reviewing all the setup information before finalizing the new user:

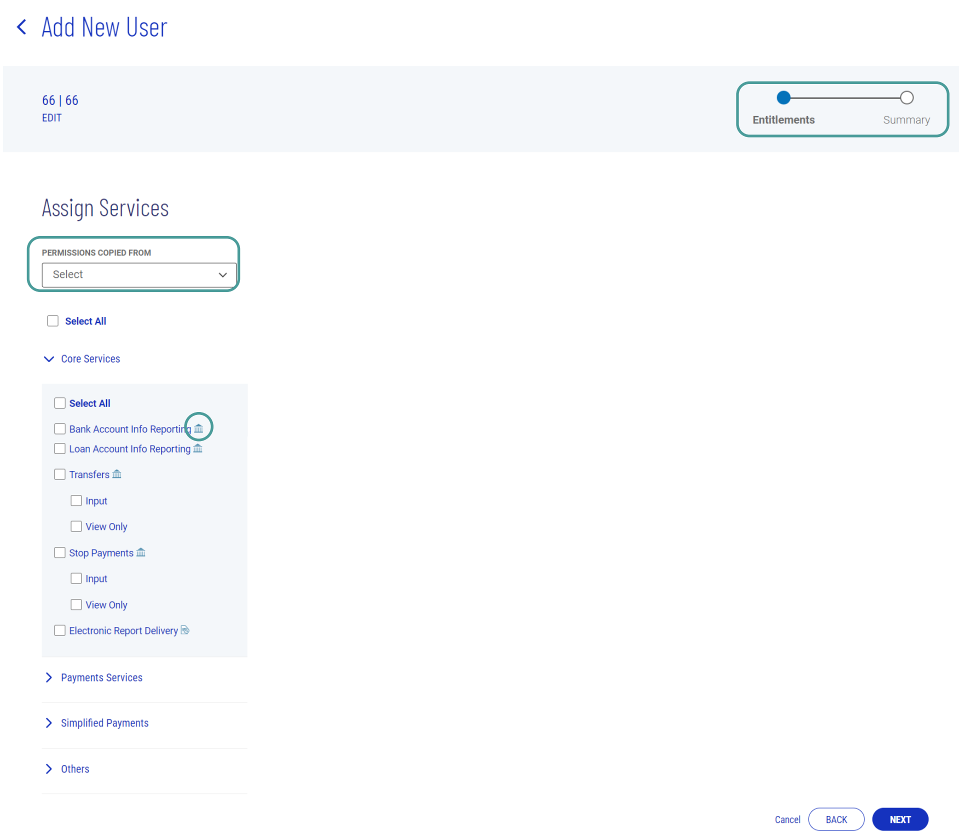
Define information related to the new user:



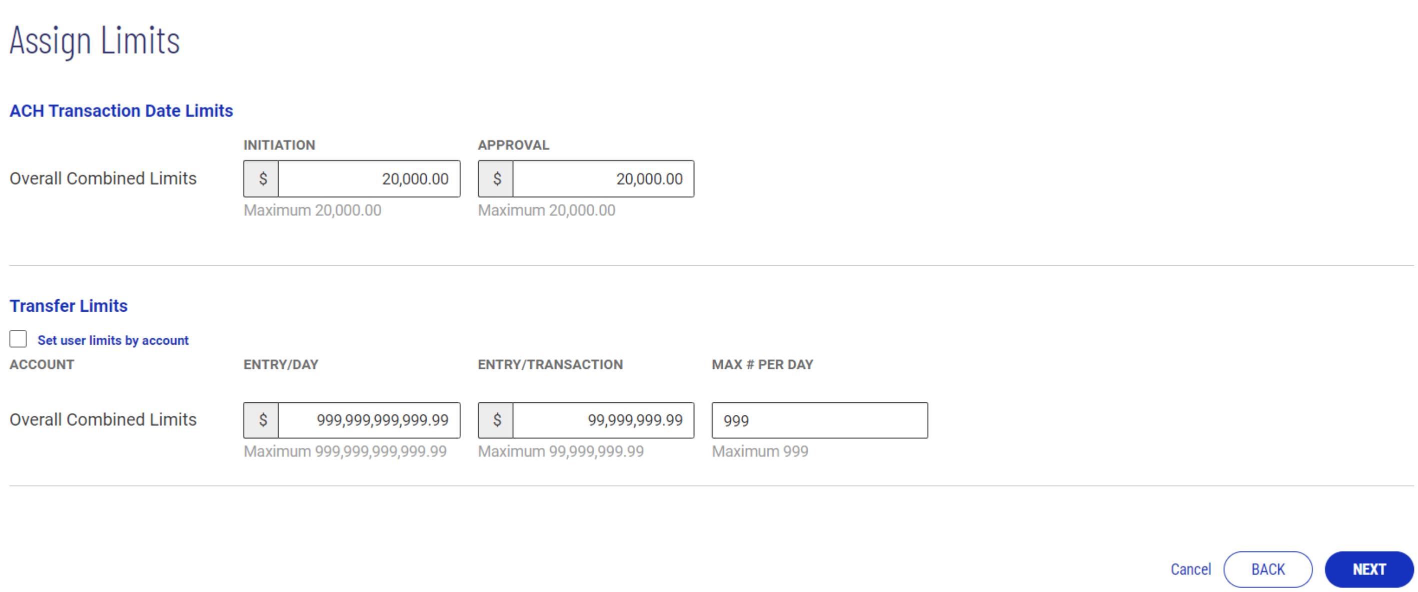
The password is assigned by the Customer Administrator, you are assisted by the display of password complexity requirements.

If user password is set to be systematically generated, an email is sent to the user when the new user profile is finalized.

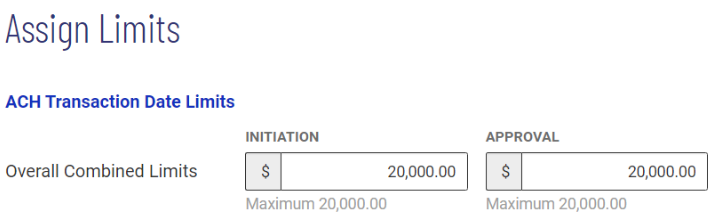
Next, continue to permit the user to various services and accounts. You have the ability to copy the permission details from an existing user or continue to set permission individually. Services with this icon need Account Level Permissions. Account Transfers require From/To direction setting :



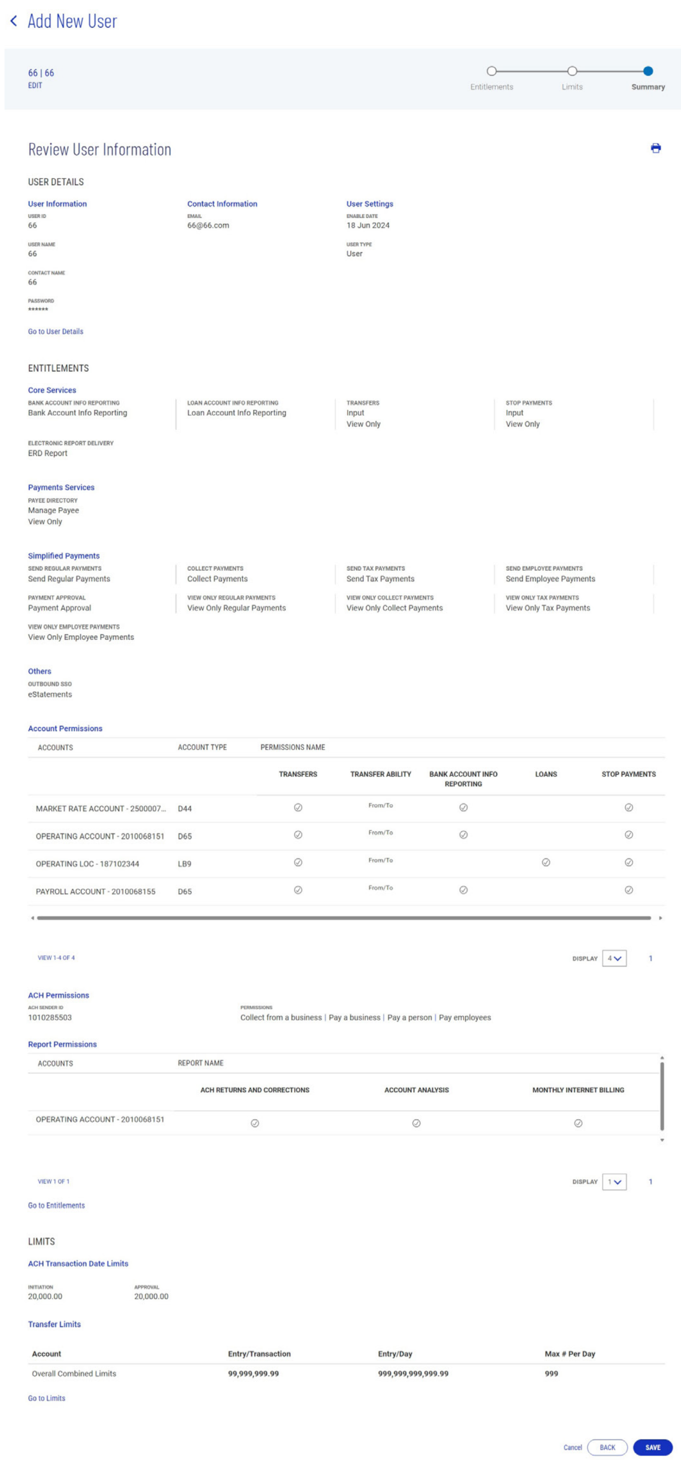
If permitted service(s) requires user limit assignment, you will be guided to the **Assign Limits** step. User limits cannot exceed the customer (company) level limits.



Alternatively to assigning an overall user level limits, your financial institution may require user limits at the ACH Company level. In such scenario, the user ACH Transaction Date Limit will be as shown below:

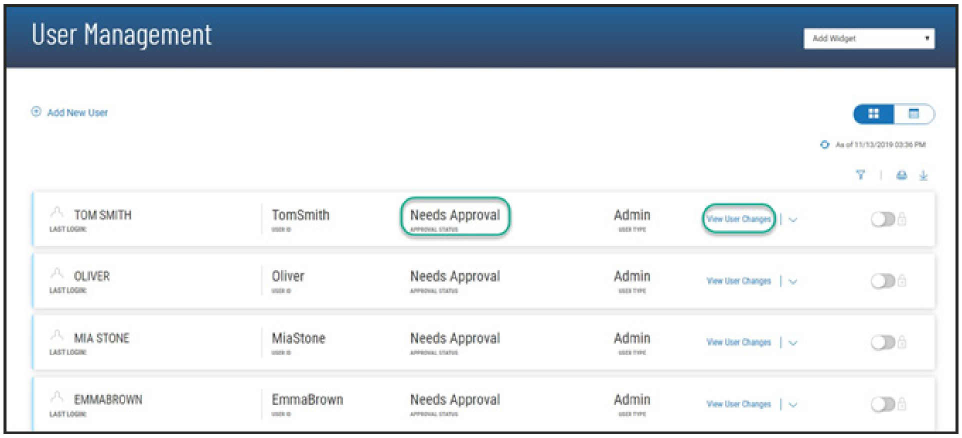


Review the entire new user setup, before finalizing. Click 'SAVE' to create the new user:

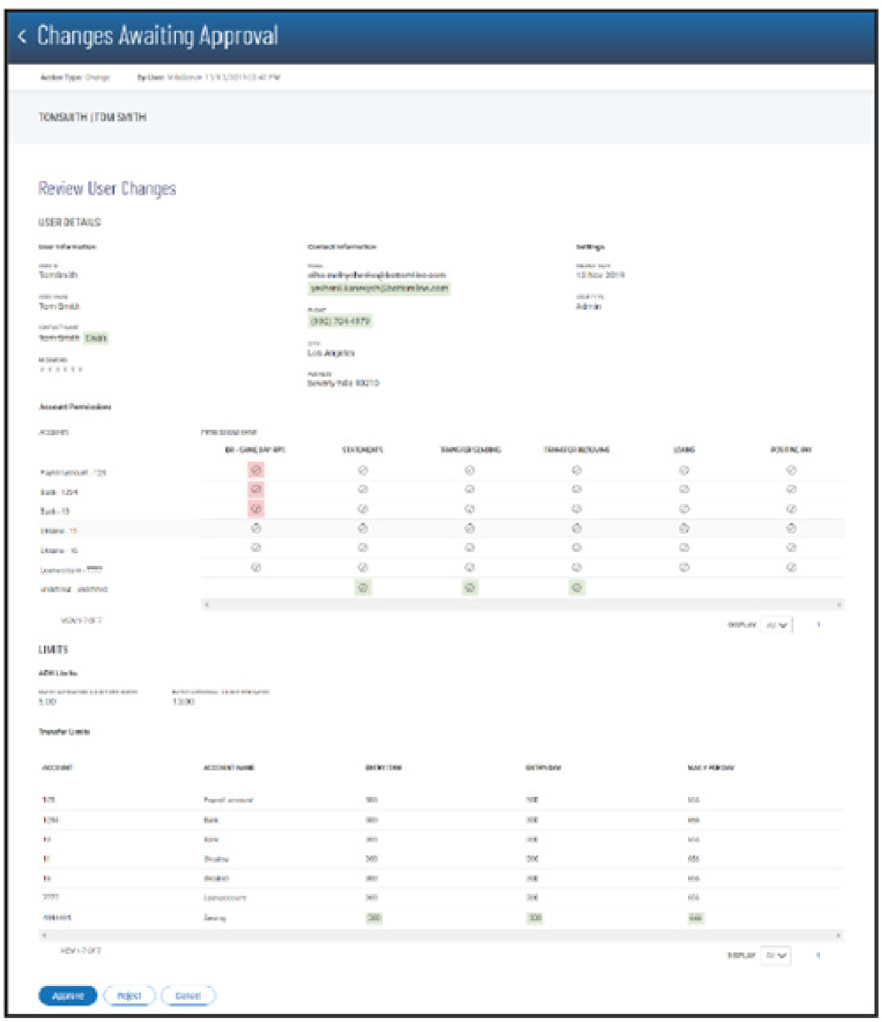


DUAL CONTROL OF USER ADMINISTRATION

If Dual Control is enabled, when any user is created/modified, approval from a second Corporate Administrator is required. The user in pending approval status is identified on the User Maintenance widget.

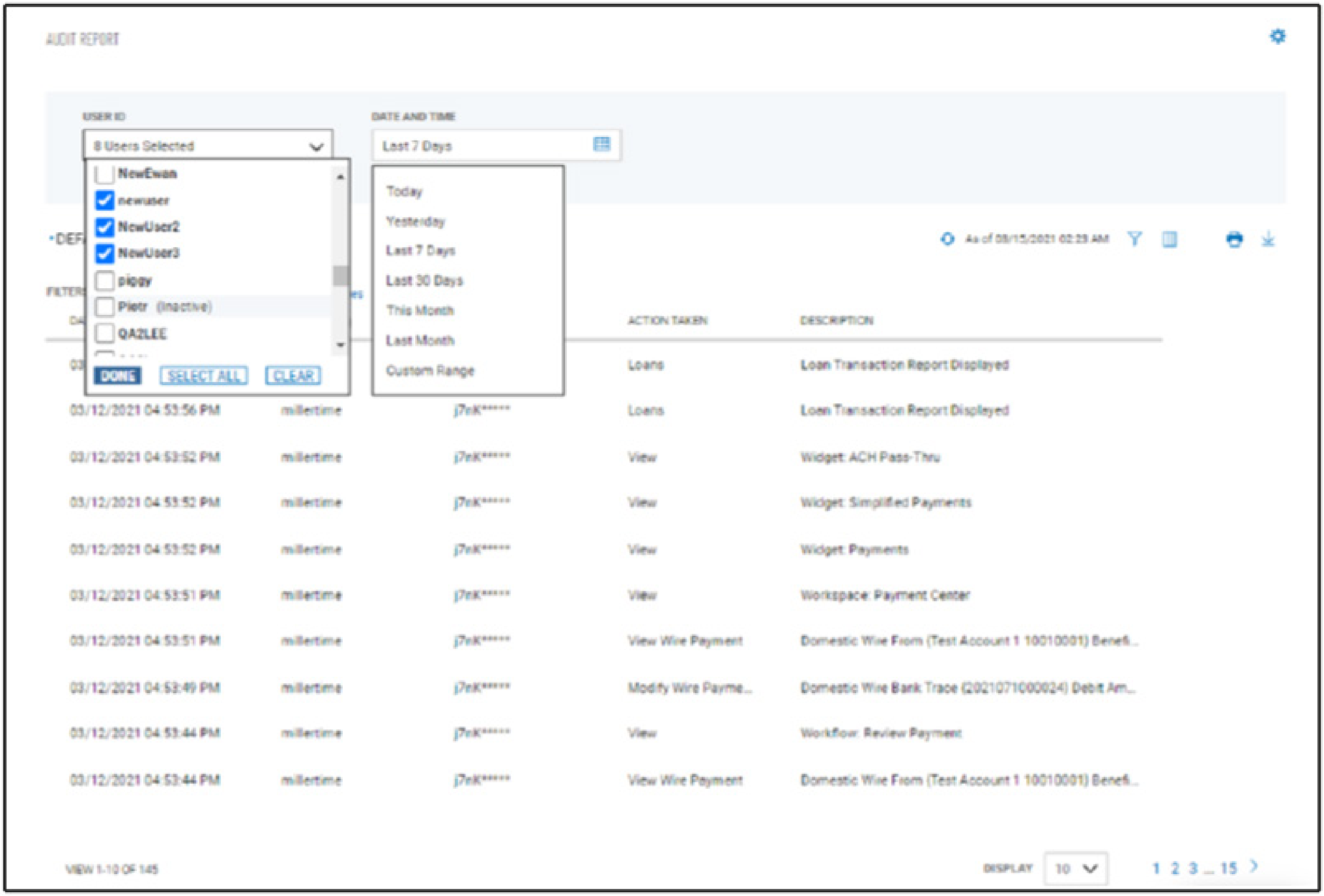


Click on the View User Changes link, the approving Corporate Administrator may review the changes on the User Detail Screen before taking action to approve or reject.



AUDIT REPORT

User activities are itemized in a list view, in order of Date and Time with the latest on top. Most frequently used query selections are provided in quick filters for your convenience. Deleted users are reported as Inactive.



As with standard list view capabilities, you can control and personalize the list:

- Choose which columns are displayed or hidden, change the column order
- Filter the data, choose a column for the data sort order
- Save a useful combination of column and data settings for later reuse
- Print the list content or export it to a CSV file