

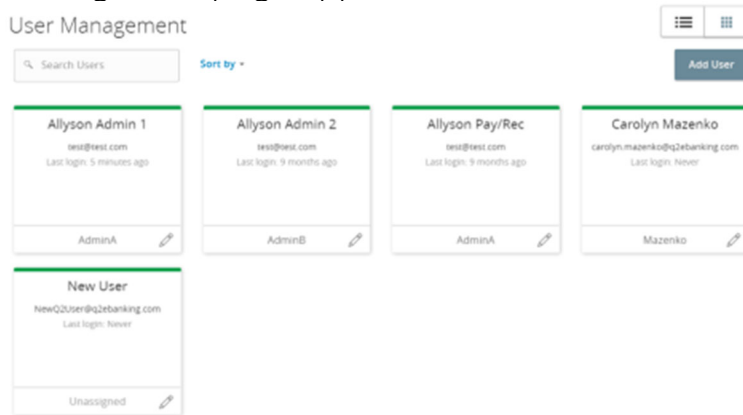
MANAGING AUTHORIZED USERS

Viewing existing users

The User Management page includes all users as cards in a grid or in a list.

To view existing users

1. In the navigation menu, click or tap **Manage Users > Add/Edit Users**. The User Management page appears with a list of users.



2. (Optional) Enter information in the search field to find more users.

Editing user rights

A user who has the Manage Users feature assigned can edit any user's rights. Changes to user rights take effect the next time that the user logs in.

To edit user rights

1. In the navigation menu, click or tap **Manage Users > Add/Edit Users**. The User Management page appears.
2. Locate the user you want to edit by browsing or searching for the user. Click or tap the edit user icon (✎). The View User page appears.
3. Verify the login name of the user in the **Login Name** field, and click or tap **Assign Rights**. The User Policy page appears.
4. Configure the user rights and limits for each Transaction Type, the account features, and the account access.
5. Click or tap **Save**.

Configuring rights and limits for Transaction Types

A user who has the Manage Users feature assigned can edit user rights and limits for Transaction Types.

To view existing rights and limits for all Transaction Types

- On the View User page for a user, click or tap **Assign Rights**. The Overview tab of the User Policy page appears with a list of Transaction Types.

To configure rights for Transaction Types on the User Policy page

1. In the navigation menu, click or tap **Manage Users > Add/Edit Users**. The User Management page appears.
2. Click or tap the User you want to edit and select **Assign Rights**.
3. On the Overview tab of the User Policy page, click or tap the icons for **Draft**, **Approve**, **Cancel**, and **View** to assign rights to a Transaction Type.
4. Click or tap **Save**.
5. Click or tap **Close**.

Configuring feature options

A user who has the Manage Users right assigned can edit user access to features. The features that appear depend on how we configure your account. Features that are turned on are highlighted and contain a check box in the row.

To configure feature options

1. On the View User page for a user, click or tap **Assign Rights**. The Overview tab of the User Rights page appears.
2. Click or tap **Features**. The Features tab appears.

FEATURES

RIGHTS

Manage Users ✓	Manage Recipients ✓
Can view all recipients ✓	

SYSTEM VALUES

Enable Bill Pay ✓	Enable Bill Pay Administration ✓
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MOBILE

Mobile Capture ✓	
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SSO

Statements ✓	Account Alerts ✓
Card Rewards ✓	feature.item.SingleSignOn/FormsSSO ✓

CUSTOM FEATURES

Card Management ✓	
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3. Click or tap features to assign to the user. These features may vary according to your configuration.
4. Click or tap **Save**.
5. On the success message, click or tap **Close**.

Configuring account access

A user who has the Manage Users right assigned can edit the access that other users have to accounts.




To configure account access

1. On the View User page for a user, click or tap **Assign Rights**. The User Policy page appears.

- Click or tap **Accounts**. The Accounts page appears.

Overview Features Accounts

ACCOUNTS


Number	Name	View 	Deposit 	Withdraw 
****-2456	Regular Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****-5489	Regular Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****-7887	Regular Checking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****-7887	Regular Checking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****-0027	Regular Checking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- For each account, click or tap the icon in each of the following columns to configure access:
 - View**
 - Deposit**
 - Withdraw**
- Click or tap **Save**.
- On the success message, click or tap **OK**.

Deleting a user

When you delete a user, you do not delete any existing transactions that the user drafted or approved, including recurring transactions. Deletion is permanent, so use caution before deleting a user.

To delete a user

- In the navigation menu, click or tap **Manage Users > Add/Edit Users**. The User Management page appears.
- Locate the user that you want to delete. You can browse or search for the user. Click or tap the edit user icon (). The View User page appears.
- Click or tap **Delete**.
- Click or tap **Yes** to verify the deletion.
- Click or tap **Close**.