

Managing Existing Online Users

1. Select the 'Treasury Services' menu and then 'Users'.

The screenshot displays the 'Home' dashboard of the corporate user management system. The left navigation menu includes options like Home, Secure Messaging, My Digital Activity, Move Money, Loan Payment, Statements and Notices, Treasury Services, Users, User Roles, Company Policy, Payments, Recipients, and Reports. A green arrow points to the 'Users' option. The main content area shows account balances for 'BUS MM SPECIAL 8-18' and 'BUSINESS ANALYSIS', and an 'ASSET SUMMARY' section with a donut chart showing \$10 Total Assets split 50/50.

| Account | Available Balance | Current Balance |
|---------------------|-------------------|-----------------|
| BUS MM SPECIAL 8-18 | \$5.03 | \$5.03 |
| BUSINESS ANALYSIS | \$5.00 | \$5.00 |

| Account | Available Balance | Current Balance |
|---------------------|-------------------|-----------------|
| BUS MM SPECIAL 8-18 | \$5.03 | \$5.03 |

- Click on the pencil icon next to the user you wish to edit.

The screenshot shows the 'User Management' interface. At the top right is an 'Add User' button. Below it is a search bar labeled 'Search Users'. A table lists users with columns for 'User', 'Email Address', 'Role', 'Status', and 'Last login'. Two users are listed: Jane Smith (Payroll Administrator, Active) and John Smith (VP of Finance, Active). A green arrow points to the pencil icon next to Jane Smith's name.

- One of three update actions may be made to an existing user:
 - Select 'Edit Status' and then 'Deactivate' to disallow a user from logging in without completely deleting the user.
 - Select the 'User Role' drop down menu to update the 'User Role' for a user. Click 'Update Role' upon completion.
 - Select the 'Delete' button to permanently delete the online user. This action cannot be undone.

NOTE: The User Role update will go into effect upon the user's subsequent logon after the change has been made.

The screenshot shows the 'User Details' interface for Jane Smith. It includes sections for 'Status' (Active), 'First Name' (Jane), 'Last Name' (Smith), 'Email Address' (jane@abc.com), 'Phone Country' (United States), and 'Phone' ((512)555-1234). There is a 'USER ROLE' section with a 'Current Role' dropdown menu set to 'Payroll Administrator' and an 'Update Role' button. Below that is a 'USER LOGINS' table with columns for 'Login Name', 'Channel', 'Status', 'Last Logon', and 'Actions'. One login is shown for 'janesmith123' on 'Internet' with a status of 'Password Change Required'. At the bottom right are 'Cancel' and 'Delete' buttons. Green arrows point to the 'Edit Status' link, the 'Update Role' button, and the 'Delete' button.

Creating New Online Users

- Click the 'Add User' button.

This screenshot is identical to the one above, showing the 'User Management' interface. A green arrow points to the 'Add User' button in the top right corner.

2. Complete all required fields which are designated with a red asterisk.
3. Click the 'Save' button when done.

NOTE: Reference the *User Roles setup guide* for assistance with setting up a 'User Role'.

New User Details

| | | |
|---|--------------------------|----------------------|
| First Name * | Last Name * | Email Address * |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Phone Country * | Phone * | Login ID * |
| <input type="text" value="Select Country"/> | <input type="text"/> | <input type="text"/> |
| Password * | Confirm Password * | |
| <input type="password"/> | <input type="password"/> | |
| User Role | | |
| <input type="text" value="Unassigned"/> | | |

First Name should not exceed 25 characters.
Last Name should not exceed 50 characters.
Login ID must be between 6 and 18 characters.
Login ID contains invalid characters.
Passwords do not match.
Must be between 10 and 99 characters
Must contain at least 1 number
Password must contain a minimum of 1 lower case characters.
Password must contain a minimum of 1 upper case characters.
Password must contain a minimum of 1 special characters.
Password may not contain the following characters <>@.

* - Indicates required field