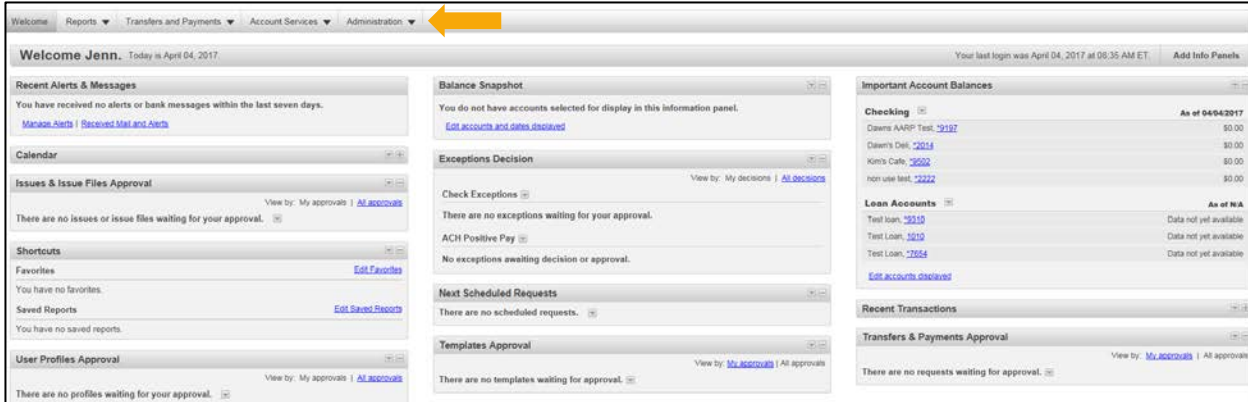


BUSINESS INTELLIGENCE ONLINE BANKING – HOW TO ADD AN ADDITIONAL USER

- Logon to Business Intelligence Online Banking.
- Click on **“Administration.”**



Welcome Jenn. Today is April 04, 2017. Your last login was April 04, 2017 at 06:35 AM ET. Add Info Panels

Recent Alerts & Messages
You have received no alerts or bank messages within the last seven days.
[Manage Alerts](#) | [Received Mail and Alerts](#)

Calendar

Issues & Issue Files Approval
There are no issues or issue files waiting for your approval. View by: My approvals | [All approvals](#)

Shortcuts
Favorites: You have no favorites. [Edit Favorites](#)
Saved Reports: You have no saved reports. [Edit Saved Reports](#)

User Profiles Approval
There are no profiles waiting for your approval. View by: My approvals | [All approvals](#)

Balance Snapshot
You do not have accounts selected for display in this information panel. [Get accounts and dates displayed](#)

Exceptions Decision
View by: My decisions | [All decisions](#)
Check Exceptions
There are no exceptions waiting for your approval.
ACH Positive Pay
No exceptions awaiting decision or approval.

Next Scheduled Requests
There are no scheduled requests.

Templates Approval
There are no templates waiting for approval. View by: [My approvals](#) | [All approvals](#)

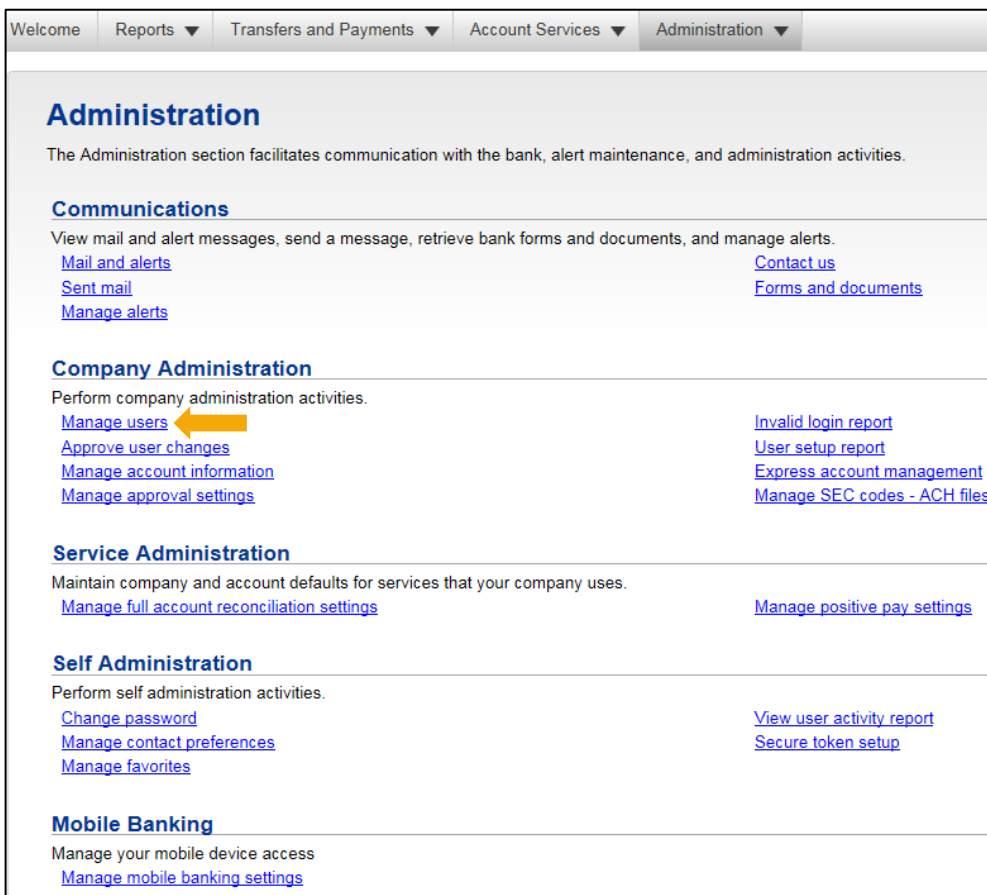
Important Account Balances
As of 04/04/2017

Account	Balance
Checking	
Dorine AARP Test_2297	\$0.00
Dorine's Del_2214	\$0.00
Kim's Cafe_2500	\$0.00
non use list_2222	\$0.00
Edit accounts displayed	
Loan Accounts	As of N/A
Test Loan_2210	Data not yet available
Test Loan_2210	Data not yet available
Test Loan_2204	Data not yet available
Edit accounts displayed	

Recent Transactions

Transfers & Payments Approval
There are no requests waiting for approval. View by: [My approvals](#) | [All approvals](#)

- Click on **“Manage users”** under Company Administration.



Welcome Reports Transfers and Payments Account Services Administration

Administration

The Administration section facilitates communication with the bank, alert maintenance, and administration activities.

Communications

View mail and alert messages, send a message, retrieve bank forms and documents, and manage alerts.

[Mail and alerts](#) [Contact us](#)
[Sent mail](#) [Forms and documents](#)
[Manage alerts](#)

Company Administration

Perform company administration activities.

[Manage users](#) [Invalid login report](#)
[Approve user changes](#) [User setup report](#)
[Manage account information](#) [Express account management](#)
[Manage approval settings](#) [Manage SEC codes - ACH files](#)

Service Administration

Maintain company and account defaults for services that your company uses.

[Manage full account reconciliation settings](#) [Manage positive pay settings](#)

Self Administration

Perform self administration activities.

[Change password](#) [View user activity report](#)
[Manage contact preferences](#) [Secure token setup](#)
[Manage favorites](#)

Mobile Banking

Manage your mobile device access

[Manage mobile banking settings](#)

- Click on the “**Create new user**” button.

Manage users

- Approve user changes
- Manage account information
- Manage approval settings
- Invalid login report
- User setup report
- Express account management
- Manage SEC codes - ACH files


User Administration

Review the options listed below for available user administration tasks.

To quickly entitle a new account for company users, go to [Express Account Management](#).

Create New User

To create a new user, click on the button below. You will have an opportunity to copy an existing user during the process.



Manage Existing Users

To manage a user's profile, roles, services & accounts, system access, or change limits, click on the appropriate user ID.

User ID	First Name	Last Name	Status

- Fill in all required fields:
 - User ID does not support special characters
 - Password is a generic password you will create for the user’s initial sign-on. The user will be prompted to change their password once enrolling for the first time. *This generic password must be between 8 to 12 characters and must contain at least 1 letter and 1 number; special characters are allowed but not required.*
 - Enter a valid email address for the user you are adding.
 - Please ensure you use a valid phone number for the user. When signing in for the first time the user will need to complete a security challenge in order to continue. The security challenge is used with either a landline (does not support extensions) or a mobile device.
- Click on “Continue.”

New User - Profile

Enter the new users information below, and click "Continue". To save this new user as a draft to be completed at a later time, click the link "Save as Draft".

User Information

User ID:

Password:

(Passwords are not case sensitive, are 8 to 12 characters long and must contain at least 1 letter and 1 number.)

Confirm password:

First name:

Last name:

Primary e-mail address:

Secondary e-mail address (optional):

Additional information (optional):

User Telephone Number

The telephone number is used to contact or notify the user for security reasons. An extension is required when needed to reach the user within an office phone system.

Label	Country/Region	Area/City Code & Number	Extension
Delete Work <input type="button" value="v"/>	UNITED STATES <input type="button" value="v"/>	508-123-4567 <input type="text"/>	<input type="text"/>
Delete Mobile <input type="button" value="v"/>	UNITED STATES <input type="button" value="v"/>	508-890-1234 <input type="text"/>	<input type="text"/>

[Add additional telephone number](#)

[Save as Draft](#)

- Carefully select the role you would like this user to have:
 - For companies looking to add a user with view only access no roles need to be assigned.
 - For companies implementing dual control, one user would have the set-up templates role and a secondary user would be added with the approve templates role.
 - If “grant this user administration privileges” is selected, the new user will have **full** access to perform any and all services within online banking.
 - If you have questions regarding the user roles, please contact a member of our Cash Management department at 508-481-8300.

New User - Roles

Select roles for this new user, and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

New user: John Doe (JDOE123) [Edit Profile](#)

Copy Existing User (optional)

To save time in creating a new user, copy roles, services, and accounts from an existing user. Select the appropriate option and link below. Roles, services, and accounts will be selected to match the copied user, and can be edited as required.

Do not copy user.

Copy user: [Select user](#)

User Roles (optional)

Allow this user to setup templates.
(This entitles the user to template setup capabilities for only those services and accounts to which the user has been entitled.)

Allow this user to approve transactions.
(This entitles the user to transmit capabilities for only those services to which the user has been entitled.)

Grant this user administration privileges.
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)

[Save as Draft](#)

- Proceed to adding “New User – Services & Accounts.”

- Services will vary based on the services the company is enabled for. When adding services to a new user, select only the services you want that user to have access to. If you have any questions, please contact a member of the Cash Management department. The standard options for companies looking to add a user with view only access are deposit reports; information reporting and statements and documents.

New User - Services & Accounts

Select services and accounts for this new user and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

New user: John Doe (JDOE123) [Edit Profile](#)

Services & Accounts (optional)

To enable a service and assign accounts, click on the appropriate link. To disable all services and accounts, click "Clear all."

0 of 27 services enabled [Clear all](#)

Service	
ACH File Upload	Add
ACH Positive Pay	Add
Bill Pay	Add
CCD Collection	Add
CCD Payment	Add
Deposit Account Reporting	Add
Deposit Reports	Add
Federal Tax	Add
Full Account Recon	Add
Incoming Wire Report	Add
Information Reporting	Add
Internal Transfer	Add
Loan	Add
Loan Payment	Add
Mobile Banking	Add
Mobile RDC	Add
Multiple Account Transfer	Add
Positive Pay	Add
Positive Pay Exception Maintenance	Add
Positive Pay Issue Maintenance	Add
PPD Collection	Add
PPD Payment	Add
State Tax	Add
Statements and Documents	Add
Stop Payment	Add
Wire Domestic One Time	Add
Wire Domestic Template Based	Add

It is the administrator's responsibility to select the appropriate services for each user depending on the roles. User entitlements and services are enabled at the administrator's sole discretion.

- This example shows adding a user with bill pay services, information reporting and internal transfers.
- If the administrator chooses to grant the new user with bill pay entitlements, please click on the "Add" button to the far right of "Bill pay." When the window expands select only the accounts that you want the new user to have access to bill pay services on. Click on "Save changes" and continue with additional services as needed.

Bill Pay [Remove](#)

NOTE: user who are assigned the Administration role have access to all accounts within Bill Pay, regardless of the entitlements set here

Description	Account Number	TRC	Entitled Account
Dawn's AARP Test		211370752	<input type="checkbox"/>
Dawn's Deli		211370752	<input checked="" type="checkbox"/>
Kim's Cafe		211370752	<input checked="" type="checkbox"/>
Mobile		211370752	<input type="checkbox"/>

- If enabling the user for Information reporting, select the add button to the right of information reporting. Place a check box beside the accounts you want the user to have access to. Repeat this process for each service you choose to enable for the new user. Remember to click on **“Save changes”** for each service and **“Continue”** in the bottom left.

Information Reporting [Remove](#)

Description	Account Number	TRC	Entitled Account
Dawns AARP Test		211370752	<input checked="" type="checkbox"/>
Dawn's Deli		211370752	<input checked="" type="checkbox"/>
Kim's Cafe		211370752	<input checked="" type="checkbox"/>
Mobile		211370752	<input checked="" type="checkbox"/>
non use test		211370752	<input checked="" type="checkbox"/>

Internal Transfer [Remove](#)

Description	Account Number	TRC	Entitled From Account	Entitled To Account
Dawns AARP Test		211370752	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dawn's Deli		211370752	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Kim's Cafe		211370752	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile		211370752	<input type="checkbox"/>	<input type="checkbox"/>
non use test		211370752	<input type="checkbox"/>	<input type="checkbox"/>

[Save as Draft](#)

- If you have selected bill pay as an entitlement for the new user, the limits will default to the company limit. You may decrease this limit at the user level. Click on **“Continue”** to proceed.

New User - Bill Pay Limits

[Edit Profile](#)

New user: John Doe (JDOE123)

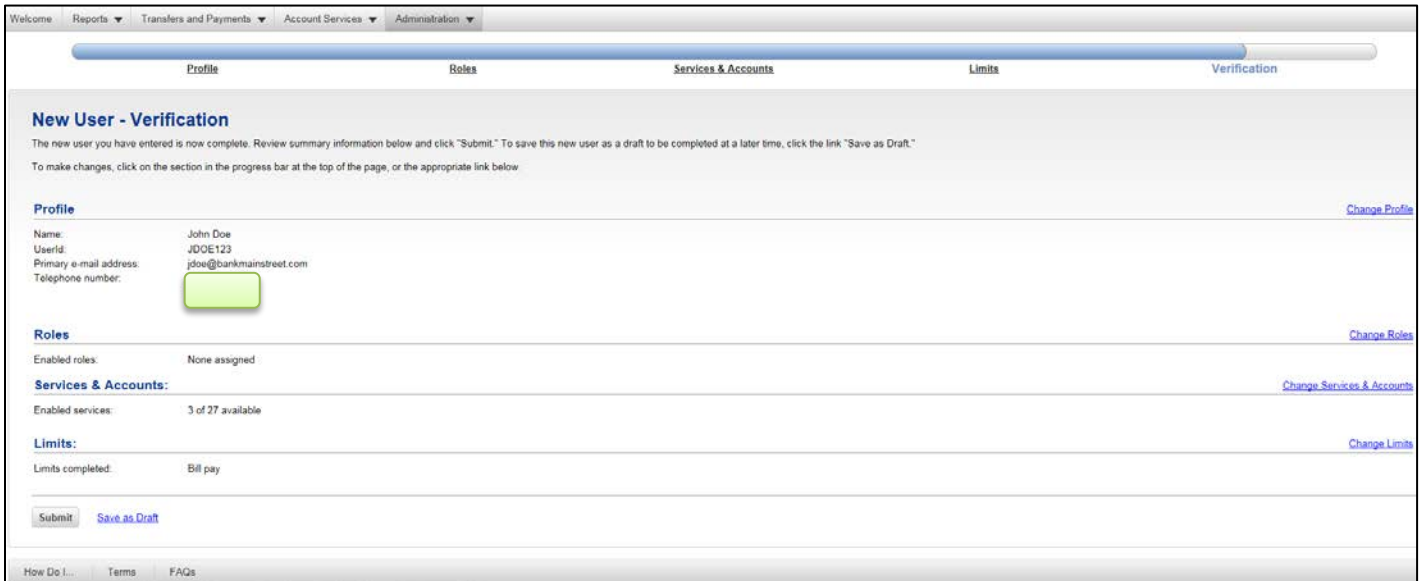
Bill Pay Company Limits

Enter user limit amounts for each of the Bill Pay companies. The limit cannot be greater than the company limit set by the bank. [View Bill Pay Company Limits](#).

Company	User Transaction Limit
Dawns Deli	<input type="text" value="9999.99"/>
Kims Cafe	<input type="text" value="9999.99"/>

[Save as Draft](#)

- You will be brought to the verification page. Please review the information, makes edits if needed and click “Submit” when finished.



Welcome | Reports | Transfers and Payments | Account Services | Administration

Profile | Roles | Services & Accounts | Limits | Verification

New User - Verification

The new user you have entered is now complete. Review summary information below and click "Submit." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."
To make changes, click on the section in the progress bar at the top of the page, or the appropriate link below.

Profile [Change Profile](#)

Name: John Doe
User ID: JDOE123
Primary e-mail address: jdoe@bankmainstreet.com
Telephone number:

Roles [Change Roles](#)

Enabled roles: None assigned

Services & Accounts: [Change Services & Accounts](#)

Enabled services: 3 of 27 available

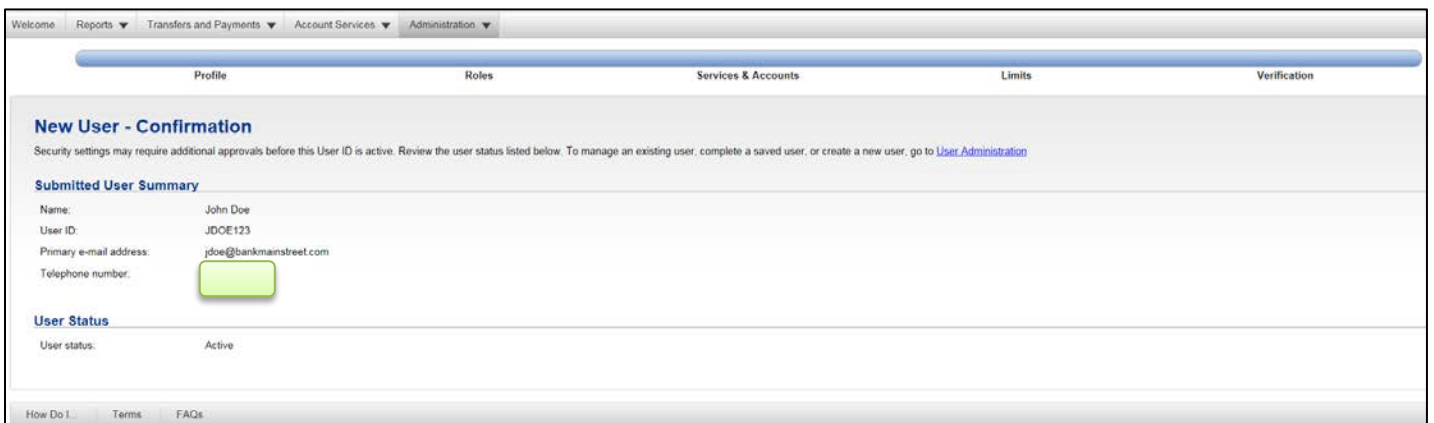
Limits: [Change Limits](#)

Limits completed: Bill pay

[Save as Draft](#)

How Do I... | Terms | FAQs

- The confirmation page will display.



Welcome | Reports | Transfers and Payments | Account Services | Administration

Profile | Roles | Services & Accounts | Limits | Verification

New User - Confirmation

Security settings may require additional approvals before this User ID is active. Review the user status listed below. To manage an existing user, complete a saved user, or create a new user, go to [User Administration](#)

Submitted User Summary

Name: John Doe
User ID: JDOE123
Primary e-mail address: jdoe@bankmainstreet.com
Telephone number:

User Status

User status: Active

How Do I... | Terms | FAQs

- The administrator will contact the new user to provide the information needed in order to sign on for the first time. This will include the Company ID, which is a numeric field that is required each time any users access the online banking site, along with their User ID and temporary password.