

Online User Management

Contents

Existing Online Users.....	2
Creating New Online Users	3

Existing Online Users

1. Select the 'Users' option under the 'Commercial Functions' menu.
2. All existing online users will be listed on the screen.
3. Click the pencil icon next to an existing user to be updated.

The screenshot shows the 'User Management' page. On the left is a navigation menu with 'Users' selected. The main area displays a list of users in a grid. Each user card includes their name, email address, and last login time. Edit icons (pencil) are visible at the bottom of each card.

Name	Email	Last Login
Chipper Jones	chipper@braves.com	2 days ago
Dale Murphy	dale@braves.com	Never
Dansby Swanson	matthew.marshall@q2ebanking.c...	15 days ago
David Justice	matthew.marshall@q2ebanking.c...	14 days ago
Freddie Freeman		Never
Matt Marshall		2 minutes ago

4. Click 'Deactivate User' to disallow a user from logging in without completely deleting the user.
5. Click the 'User Role' drop down menu to update the 'User Role' for a user. Click 'Update Role' upon completion.

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

6. Click the 'Delete' button to delete the online user.

The screenshot shows the 'View User' page for Chipper Jones. It contains form fields for user details, a table for login history, and buttons for 'Deactivate User', 'Update Role', 'Cancel', and 'Delete'.

User Details:

- First Name: Chipper
- Last Name: Jones
- Email Address: chipper@braves.com
- Phone Country: United States
- Phone: (678)644-5466
- Status: Active
- User Role: Chipper Jones

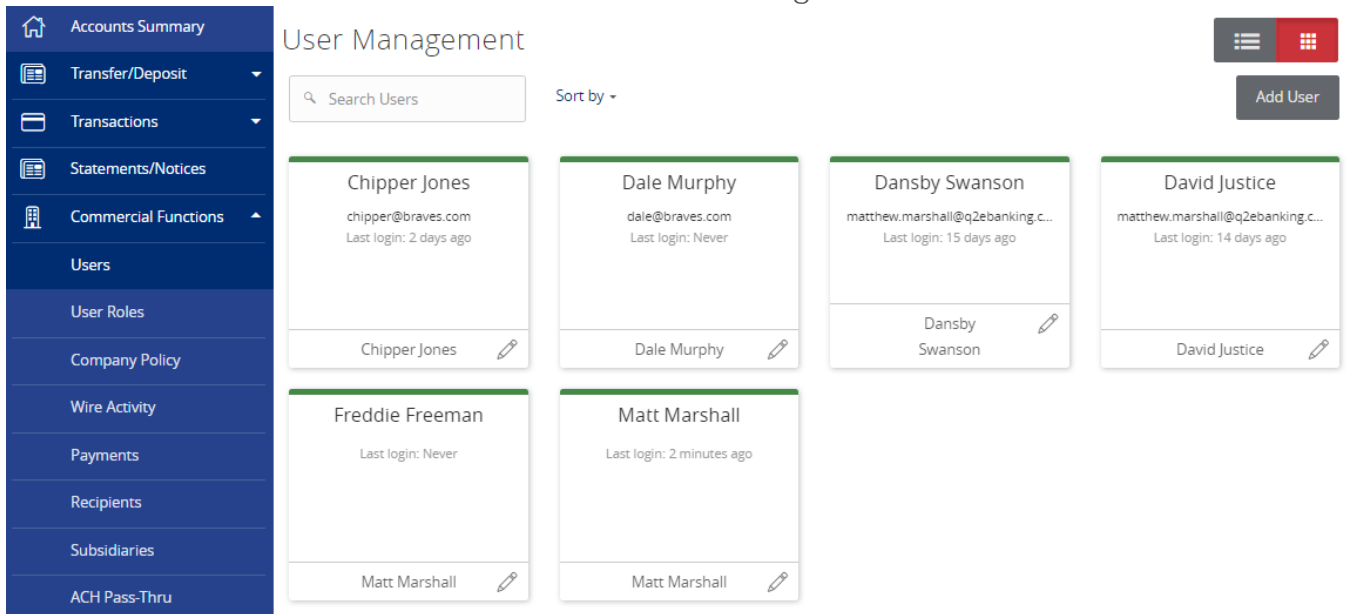
Login History Table:

Login Name	Channel	Status	Last Logon
chipperjones10	Internet	Normal	9/20/2016

* - Indicates required field

Creating New Online Users

1. Click the 'Add User' button to add a new online banking user.



2. Enter all fields on the form. Login ID and Password requirements are listed on the right side of the screen.
3. Assign a User Role to the user.

NOTE: If the new user requires entitlements different than any existing user role, copy an existing user role, make the necessary changes and then assign to the new user.

4. Click the 'Save' button when done.

New User

First Name *

Last Name *

Login ID must be at least 3 characters long.
Login ID must be no more than 19 characters long.
Login ID contains invalid characters.

Email Address *

Passwords do not match.
Password must be at least 5 characters long.

Phone Country *

Phone *

Password can be no more than 15 characters long.
Password must contain a minimum of 1 numbers.

Login ID *

Password *

Confirm Password *

User Role

* - Indicates required field

Cancel

Save