# User Roles

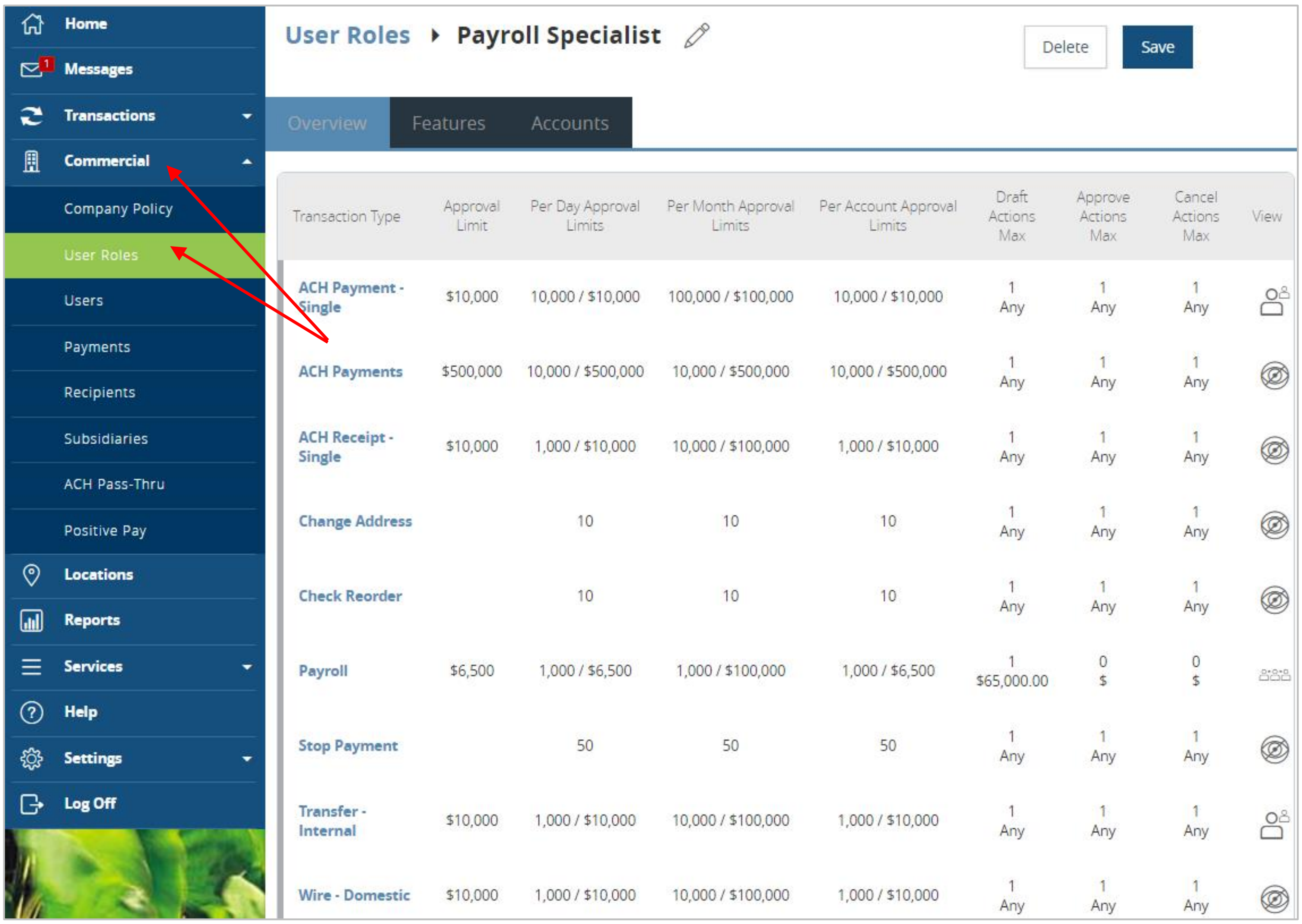
## Contents

# User Role Overview

➢ **The User Role controls feature entitlements and dollar limits for one or more company users who have the need for identical Online access.**

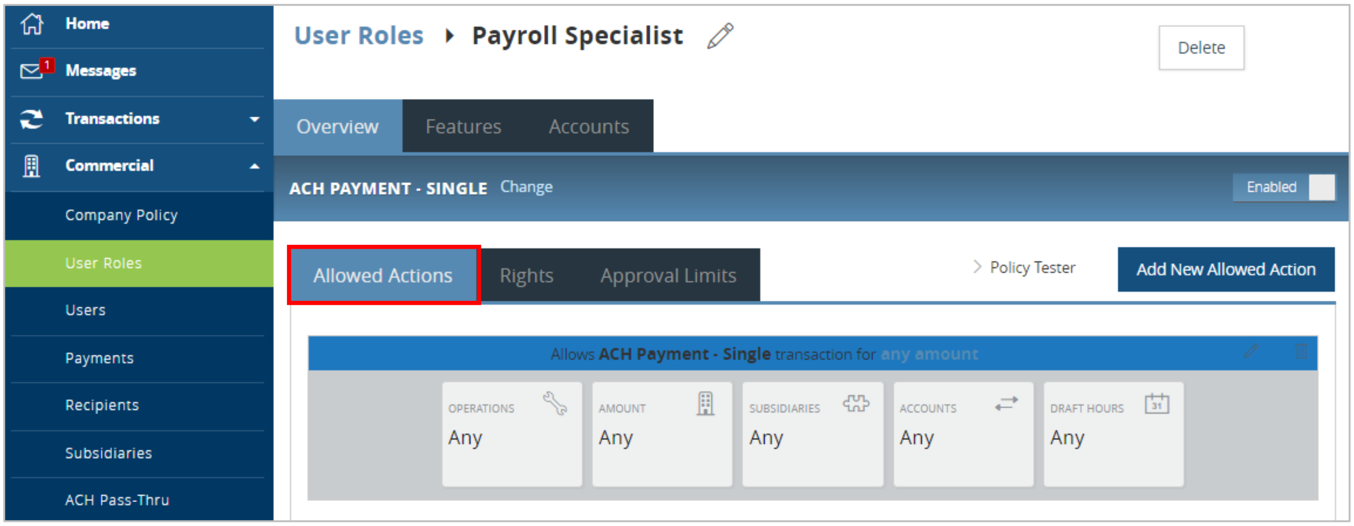
1. Select the ‘User Roles’ option in the ‘Commercial’ menu.
2. Select an online transaction type by clicking on the corresponding blue link. (ex. ACH Collection)

NOTE: All transaction types in the ‘Overview’ section contain a consistent workflow for ease of use.



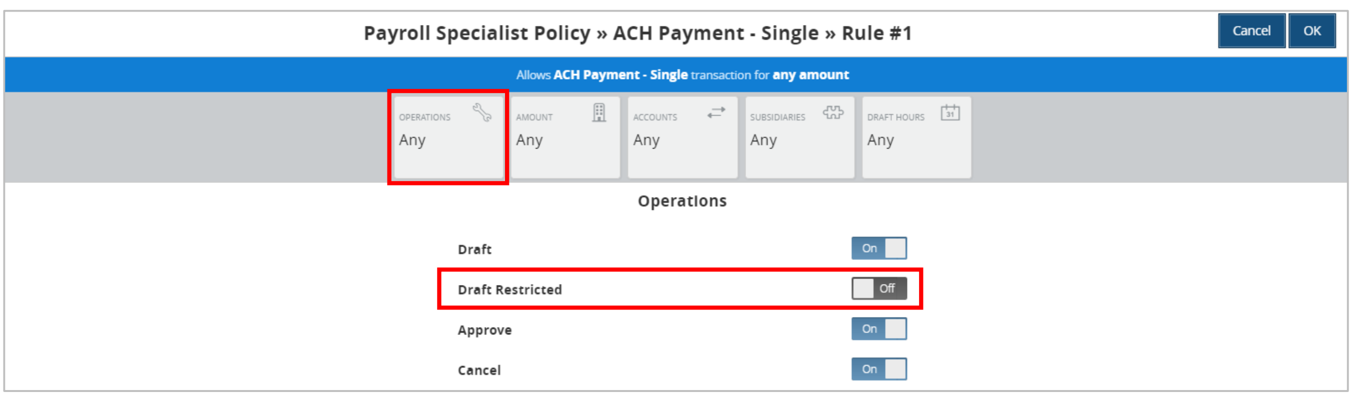
## *Allowed Actions*

NOTE: One or multiple levels may be setup to establish general or granular user limitations.

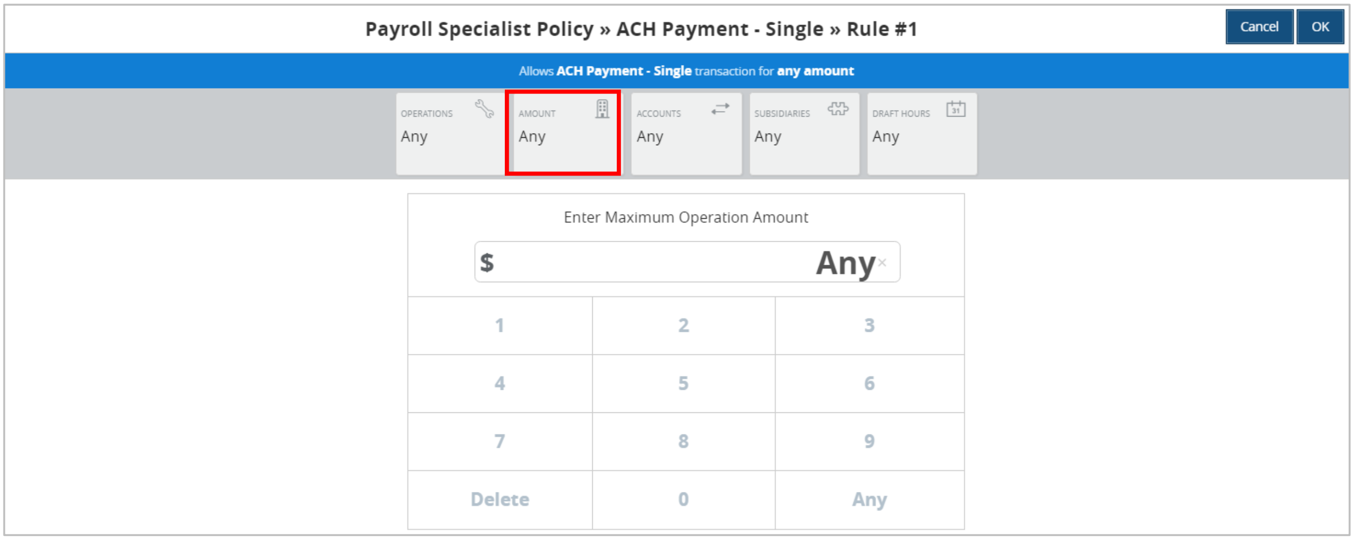



3. Click on the 'Operations' box. Specify the allowed actions for the transaction type.

NOTE: 'Draft Restricted' access allows the user(s) in the role to only access payment templates assigned by the Company Administrator. The user(s) will not be able to edit, delete or add any new recipients. The user(s) will not be able to add any new templates or payments. The only changes allowed include the dollar amount, effective date and to insert a comment.

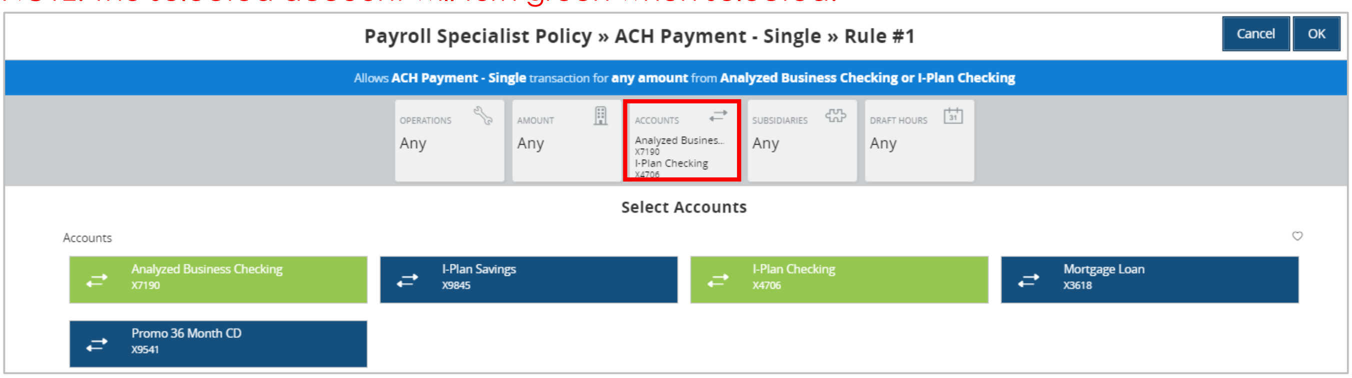


4. Click on the ‘Amount’ box. Specify the dollar amount for the allowed action.



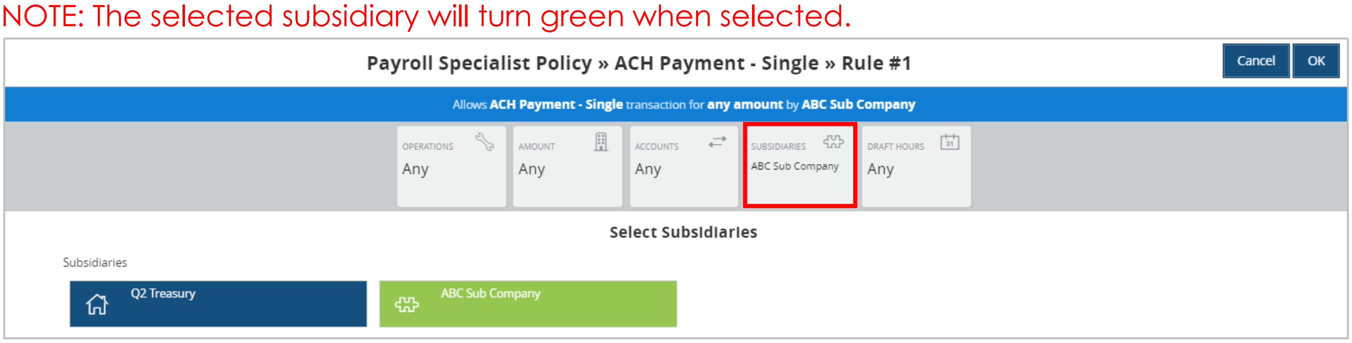

5. Click on the ‘Accounts’ box. Select the account(s) allowed for this transaction type.

NOTE: The selected account will turn green when selected.



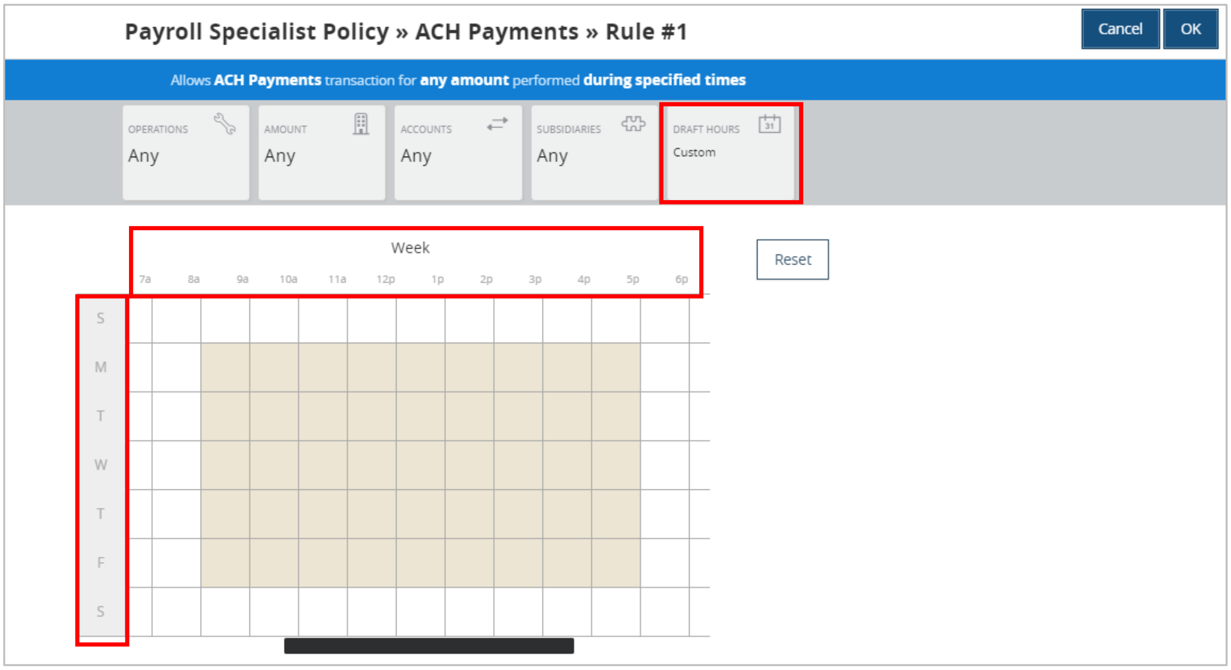

6. Click the ‘Subsidiaries’ box. Select the subsidiarie(s) allowed for this transaction type.

NOTE: The selected subsidiary will turn green when selected.

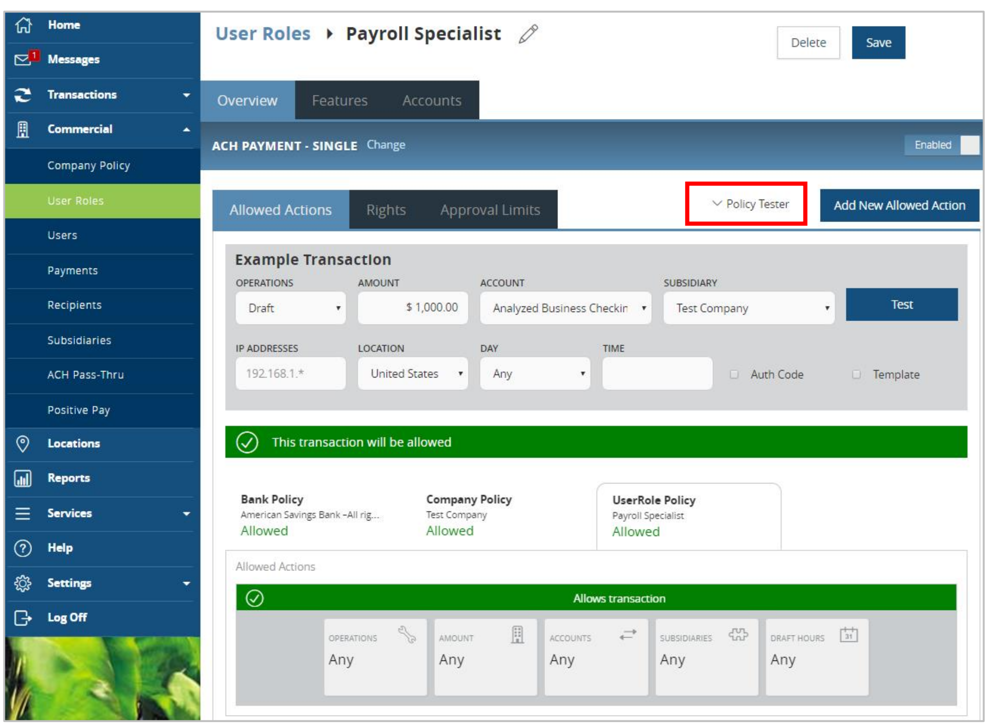


7. Click the ‘Draft Hours’ box. Select the days and hours allowed for this transaction type.

NOTE: The days of the week down the left side and the hours of the day across the top can be clicked to select an entire row or column. The individual boxes can also be selected or deselected.

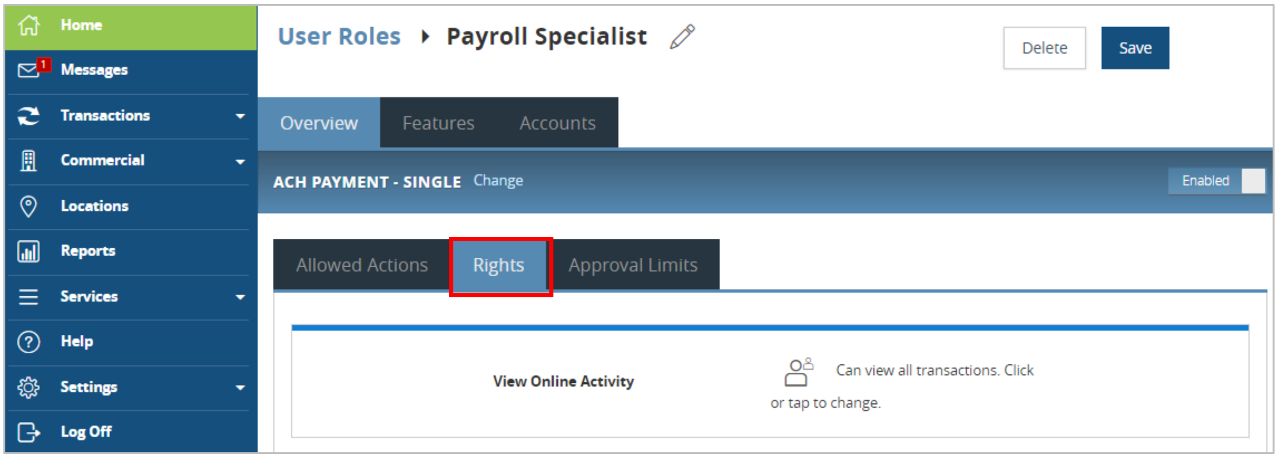



8. Click the ‘Policy Tester’ to validate the Company Policy functionality to assure the setup is as needed.

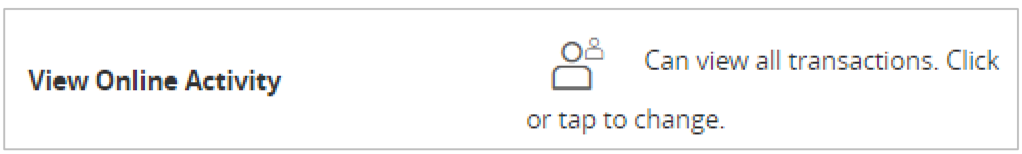


## *Rights*

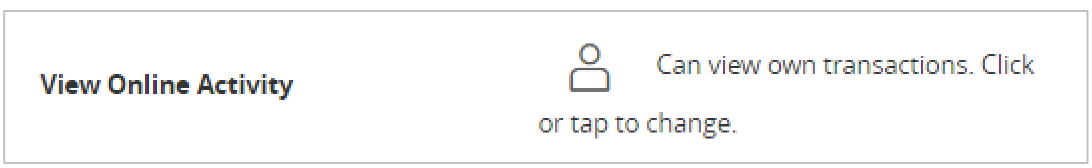
- ➢ **The user role's ability to view transactions in the 'Activity Center'.**



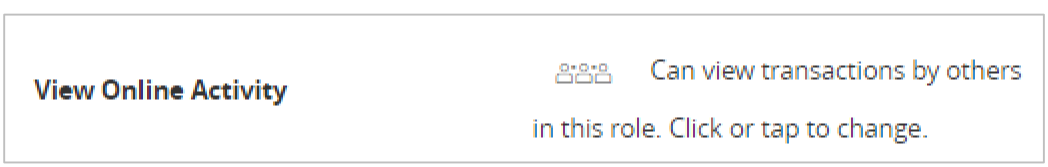

a. Can view transactions initiated by any online banking user within the company.




b. Can only view the user's own transactions.



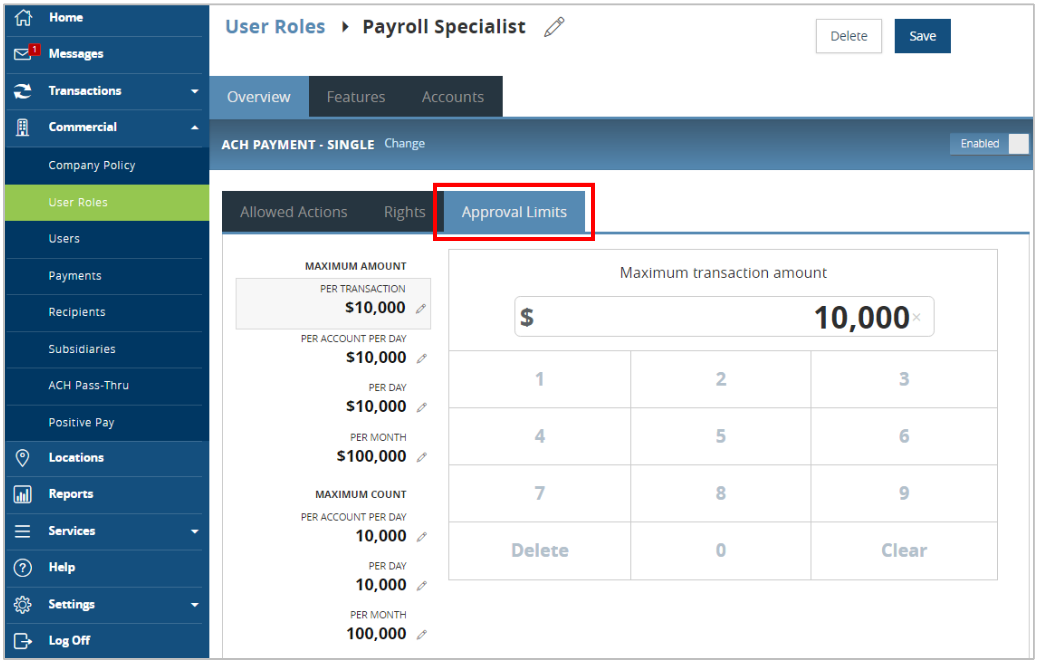

c. Can view transactions initiated by users who are assigned to the same user role.




d. Cannot view any transactions.

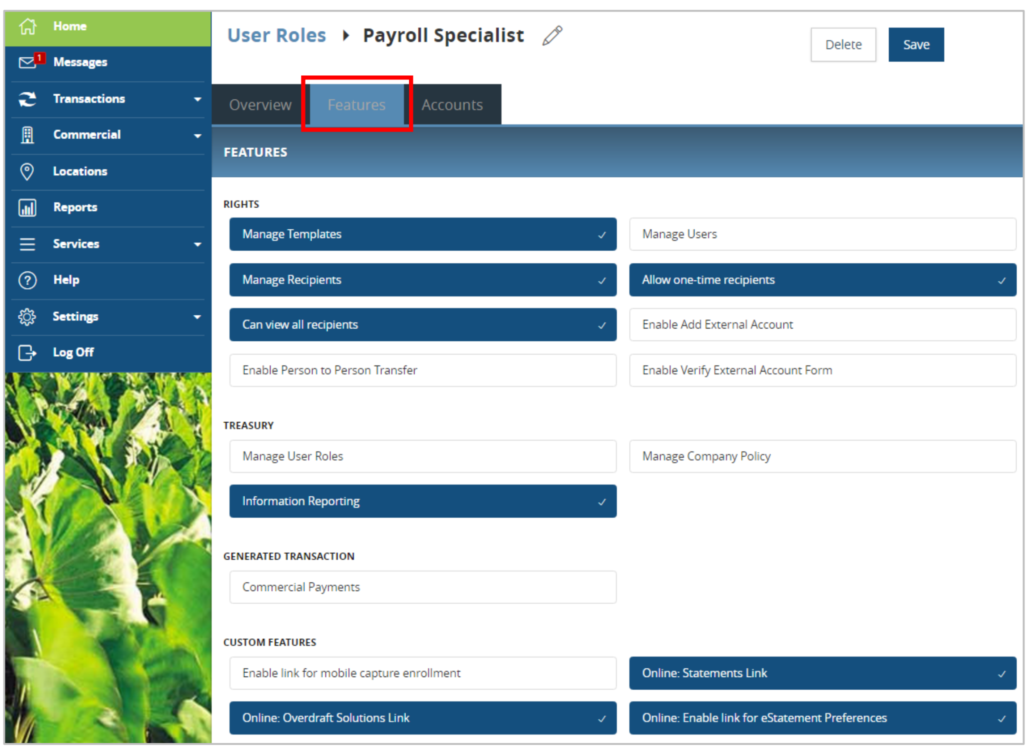
## Approval Limits

Click the ‘Approval Limits’ tab to view and modify the dollar and count limits allotted to the company by American Savings Bank.




## Features

Click on the ‘Features’ tab to view and modify the non-transactional features allotted to the user role by the Company Administrator.



## *Accounts*

Click on the 'Accounts' tab to view and modify the account entitlements allotted to the user role by the Company Administrator.