

Do you need to set up users?

eBanking allows business owners and managers to set up user-specific permissions to access your business accounts. You will be able to assign a unique user ID and password for each user.

If you are a larger business and think multiple users would be helpful, please contact your accountant or business financial advisor to establish your business policies. Once those policies are in place, the pages in this section will help you establish and configure your eBanking users and their individual permissions within your accounts.

If you manage a small company with only one person needing an eBanking user ID and password, you can skip this section.

Note For your convenience several features within eBanking have a Grid or List option in the upper-right corner. Discover which view option you prefer to use.

To Add a New User:

The image shows two screenshots from a web application. The top screenshot is the 'User Management' page, which has a 'Grid' view selected in the top right corner. It displays a table with four user entries, each showing a name, email, last login status, and an 'Add User' button. The bottom screenshot is the 'New User' form. It contains fields for First Name, Last Name, E-mail Address, Phone Country, Phone, Login ID, Password, Confirm Password, and User Role. Fields marked with an asterisk (*) are required. A legend at the bottom left states '* - Indicates required field'. A 'Cancel' button and a 'Save' button (with a '2' icon) are at the bottom right. On the right side of the form, there are several password requirements: 'Login ID must be at least 8 characters long.', 'Login ID must be no more than 32 characters long.', 'Login ID contains invalid characters.', 'Passwords do not match.', 'Password must be at least 8 characters long.', 'Password can be no more than 15 characters long.', 'Password must contain a minimum of 1 numbers.', 'Password must contain a minimum of 1 lower case characters.', and 'Password must contain a minimum of 1 upper case characters.'

Click on the **Users** tab in the **Commercial** menu.

1. Click the **Add User** button on the right-hand side of the screen.
2. Enter the new user's personal information. Fields marked with an asterisk are required. When finished click **Save**.

Once you have created a user, you can now assign rights.

Overview lists the rights and limits the user has for each type of transaction.

Features lists the features assigned to the user.

Accounts lists the accounts the user can access.

To Assign User Rights:

View User

FIRST NAME *

LAST NAME *

TEXT

TELEPHONE

E-MAIL ADDRESS *

PHONE COUNTRY *

PHONE *

Login Name	Channel	Status	Last Login
	Internet		4/12/2016

* - Indicates required field

Cancel

Delete

Assign Rights

Note

**Approvers must have
"View All Transactions"
view rights enabled.**

Overview								
Features								
Accounts								
Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft Actions Max	Approve Actions Max	Cancel Actions Max	View
Stop Payment		999,999,999	999,999,999	999,999,999	1 Any	1 Any	1 Any	
Transfer - Internal	\$99,999,999	999,999,999 / \$99,999,999	999,999,999 / \$10,000,000	999,999,999 / \$10,000,000	1 \$99,999,999.00	1 \$99,999,999.00	1 \$99,999,999.00	

Click on the **Users** tab in the **Commercial** menu.

1. Click on the **Edit icon** of the user you want to assign rights to.
2. Details of the user will appear. Click the **Assign Rights** button.
3. Under the **Overview** tab, you can view transaction types and indicate whether you want this user to have the ability to: **Draft**, **Approve**, **Cancel** or **View** the transaction. Simply click on the check mark to disable the rights.

- **User View** = can view own activity only

- **View All Transactions** = can view activity by all users

- **Cannot View** = cannot view activity by any user

You can set limits on the number and dollar amount of transactions a user can approve. Click on the Transaction Type name link to update user limits.

For example, when you click on "Stop Payment" you can change Allowed Actions, User Rights, and Approval Limits.

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Overview **Features** Accounts

FEATURES

RIGHTS

Manage Templates ☐ Manage Users ☐

Manage Recipients ☐ Allow one-time recipients ☐

Can view all recipients ☐

TREASURY

Manage User Roles ☐ Manage Company Policy ☐

Information Reporting ☒

GENERATED TRANSACTION

Commercial Payments ☐

SYSTEM VALUES

Enables User Only Access for Business ☐

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Overview **Accounts**

ACCOUNTS

Internal Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
X3006	PROMO 60 MONTH BIZ CD LADDER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
X3007	PROMO 60 MONTH BIZ CD LADDER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Under the **Features** tab you can choose which features you want this user to access. Dark colored features indicate they are active. To deactivate a feature, simply click on it and the box surrounding it will turn white, signifying that it is inactive.

Manage Templates On - create, edit, and delete any type of template

Manage Recipients On - create, edit, and delete recipients
- add or remove recipients to/from templates

Manage Users On - add and delete users
- edit features, accounts and limits for any user. (see below)

Can View All Recipients

Allow One Time Recipients

These two options work together in a variety of scenarios.

Ask American Savings Bank for more details.

5. Under the **Accounts** tab, you can choose which accounts this user is able to View, as well as allowances to Deposit funds or Withdraw funds.
6. Be sure to click **Save** when finished.



A user who has the User Management feature assigned can change his or her own rights and limits, so be sure to limit which users have the User Management feature assigned.

Adding Users and specifying their individual rights and what features each individual has access to helps create a checks and balances system within your organization or business.

To Edit or Delete a User:

The screenshot shows the 'User Management' interface. At the top, there are tabs for 'Grid' and 'List', and a search bar labeled 'Search Users'. Below the search bar, there are four user cards. The first card is highlighted with a blue circle and the number '1'. The 'View User' screen is displayed below the cards. It shows the user's details: FIRST NAME (Test), LAST NAME (Tester), E-MAIL ADDRESS, PHONE COUNTRY, and PHONE. Below the details, there is a table with columns: Login Name, Channel, Status, and Last Logon. The table shows one entry: Login Name (Internet), Channel (Internet), Status, and Last Logon (4/12/2016). At the bottom right, there are three buttons: 'Cancel', 'Delete', and 'Assign Rights'. The 'Delete' button is highlighted with a blue circle and the number '2', and the 'Assign Rights' button is highlighted with a blue circle and the number '3'.

User Management

Grid List

Search Users Sort by Add User

View User

FIRST NAME * LAST NAME *

Test Tester

E-MAIL ADDRESS *

PHONE COUNTRY * PHONE *

Login Name	Channel	Status	Last Logon
Internet	Internet		4/12/2016

* - Indicates required field

Cancel Delete Assign Rights

Click on the **Users** tab in the **Commercial** menu.

1. Find the user whose rights you would like to change; click the **Edit** icon:
2. **To Edit a user:** click on the **Assign Rights** button. Make the necessary changes. Click the **Save** button.
3. **To Delete a user:** click **Delete**, then **Yes** to verify the delete. Click **Close** when you are finished.