System Administration

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Accessing Administration Functions

To work with SystemManager features:

1. Click the **Administration** hyperlink, in the upper right-hand corner of the system window. The Administration tabs are displayed.
2. Click the appropriate tab. Submenus are displayed.
3. Click a submenu item to access the feature.

Setting Account Permissions

System managers can grant access permissions to users for specific accounts. These permissions can be given to a user separately for each module in the system, or can be given to a user for all modules.

To assign user access to accounts:

1. From the **Administration** tabs and submenus, select **User Setup,** then **Account Permissions**.
2. From the **User** drop-down list, select the ID of the user to whom account access is to be assigned.

   Note: Log-on names are associated with a user's record only after the user performs the first-time sign-on procedure.

   The **Application** drop-down list is displayed.
3. Select an application (module) for which permissions are to be assigned. Do one of the following:
   - Select a specific application

     From the Application drop-down list, select an application name.
   - Select all applications

     From the **Application** drop-down list, select **All Applications**.

     Accounts available for the application(s) you selected are displayed. The application names are in the left-hand column, and the account numbers, each with their own checkbox, are in the right-hand column.
4. Select the checkbox associated with each account for which permissions are to be granted.

   [Optional] Click the **Check All** button to select all checkboxes, or click the **Clear All** button to deselect all checkboxes.
5. Click the **Submit** button. A confirmation message is displayed when your selections have been processed.

Setting Account Names

System managers can set names for accounts. Where the functionality is available in the system, these account names will be displayed in parentheses next to the account numbers (in drop-down lists, for example). Additionally, where available, the account's name is displayed when the user moves the cursor over an account number.

To set or change an account name:

1. From the **Administration** tabs and submenus, select **User Setup,** then **Account Names**. Accounts and the fields used to name them are displayed.
2. In the **Name** fields associated with account numbers, enter the names to be assigned.
3. Click the **Submit** button to save your selection. A confirmation message is displayed.

Setting Password Retention Period

System managers assigned the appropriate permissions can set the expiration period for all users at their company site.

To set the password retention period:

1. From the **Administration** tabs and submenus, select **Security,** then **Security**.
2. In the **Password Expiration Days** field, enter a number of days.
3. Click the **Submit** button. A confirmation message is displayed.

Managing Remote Deposit User Settings

For each Remote Deposit user, the System Manager can set:

- **Per-Item Approval Limit:** Limits the maximum value of any single check that a user can approve.
- **Per-Item Submission Limit:** Limits the maximum value of any single deposit ticket that a user can submit in a single day.
- **Per-Deposit Approval Limit:** Limits the maximum value of any single "deposit ticket" that a user can approve.
- **Per-Deposit Submission Limit:** Limits the maximum value of any single "deposit ticket" that a user can submit in a single day.

Additionally, System Managers can allow a user to:

- See items scanned by others.
- Submit deposits without requiring an approval.
- Approve their own deposits.

To set Remote Deposit limits:

1. From the **Administration** tabs and submenus, select **User Setup,** then **Remote Deposit**.
2. IIn the **Users** list, click the User ID/log-on name of the user for whom permissions are to be set.
3. Make the necessary setting changes.
4. Click the **Update** button to save the changes. A confirmation message is displayed.
5. Click **OK**.

Note: System Managers may modify their own settings only if the financial institution has assigned them permissions to do so.

System Administration: User Profiles

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Accessing the User Setup Utility

To access the User Setup utility:

1. Click the **Administration** hyperlink in the top right-hand corner of the application window. The Administration tabs are displayed.
2. Click the **User Setup** tab. The Security submenu is displayed beneath the tab.
3. Select the **User Setup** submenu item.

Adding a User Profile

Important: Once you have created a user profile, you must assign account access to the user in order for the user to access the system!

To create a user profile:

1. Access the User Setup feature.
2. Click the **Create** button, located beneath the Users pane. The Create New User pane is displayed.
3. In the **User ID** field, accept the generated ID or enter a unique four-character ID for the user. This ID identifies the user to the server.
4. In the **User Name** fields, enter the user's first name, middle initial, and last name.

   Note: User names are displayed on the Users pane after the user generates a permanent log-on ID during first-time log-on.
5. Select the checkboxes corresponding to the services the user will be permitted to access (the "user validations").
6. *[Optional]* Click the **Auto-account Permission** checkbox to automatically assign access to accounts validated for features to which the user will be given access.

   Note: Selection of this checkbox is valid only during the current operation; if you later modify the user profile, the checkbox will be de-selected.
7. Click the **Add User** button. The user is added to the system, and the Users pane is displayed.

Modifying a User Profile

To modify a user profile:

1. Access the User Setup feature.
2. In the **Action** column, click the **modify** hyperlink associated with the user profile to be modified. The Modify User pane is displayed.

   Note: You may not modify your own user profile or the user profile of any other system manager. If a user is a system manager, a **Y** is displayed in the **Sys Mgr** column of the Users pane in that user's row, and no **modify** hyperlink is available for the user.
3. Make the necessary changes in the **User Name** fields and select or deselect checkboxes to assign or remove validations to/from the user profile.
4. *[Optional]* Click the **Auto-account Permission** checkbox to automatically assign access to accounts validated for features to which the user will be given access.

   Note: Selection of this checkbox is valid only during the current operation; if you later modify the user profile, the checkbox will be de-selected.
5. Click the **Update** button. A confirmation message is displayed.
6. Click the **Return to List** button to return to the Users pane.

Regenerating PIC Letters for Forgotten User Names

If a user has forgotten their user name, you can generate a new PIC letter to allow the user to access the system using the first-time log-on procedures. The user will need to create a new permanent user name.

For security purposes, system managers may not regenerate PIC letters for other system managers.

Note: This feature is not intended to address forgotten passwords or "locked" status due to multiple unsuccessful log-on attempts or a user who has closed the browser window without logging off. For help with these issues, please contact the Customer Service Center.

To regenerate a user's PIC letters:

1. Access the User Setup feature.
2. In the **Action** column, click a **modify** hyperlink associated with the user whose PIC letters are to be regenerated. The Modify User pane is displayed.
3. Click the **Regenerate PIC** button. The PIC-letter regeneration is confirmed, and the Users pane is displayed.

Deleting a User Profile

To delete a user profile:

1. Access the User Setup feature.
2. In the **Action** column, click the **delete** hyperlink associated with the user profile to be modified. A confirmation dialog box is displayed.
3. Click the **OK** button. The list of user profiles is refreshed, and a confirmation message is displayed.

   [Optional] Click the **Cancel** button to discard the deletion request.