

Online User Management

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Existing Online Users

1. Select the 'Users' option under the 'Commercial' 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, a navigation menu has 'Users' highlighted under the 'Commercial' section. The main area displays a table of users with columns for User, E-mail Address, Role, Status, and Last login. The user 'Brian Johnson' is highlighted in red, and a red circle is drawn around the pencil icon next to his name. A red arrow points from the 'Users' menu item to the table.

User	E-mail Address	Role	Status	Last login
Brian Johnson	brian@test.com	Q2 Treasury	Login Locked Out	22 days ago
Charlie Brown		Q2 Treasury	Active	4 months ago
David Smith	dsmith@test.com	Q2 Treasury	Active	5 hours ago
Jack Wilson	jack@test.com	Q2 Treasury	Disabled	
Sally Smith	sally@test.com	Q2 Limited Access	Active	

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 'David Smith'. The user's details are displayed in a form, including first name, last name, email address, phone number, and status. The status is set to 'Active'. There is a 'Deactivate User' button. The 'User Role' is set to 'Main Treasury', and there is an 'Update Role' button. At the bottom right, there are 'Cancel' and 'Delete' buttons, with the 'Delete' button highlighted by a red box.

Login Name	Channel	Status	Last Logon
q2advisory	Internet	Normal	6/7/2016

Creating new online users

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

The screenshot shows the 'User Management' page. On the left is a navigation menu with 'Users' highlighted. The main area displays a table of users:

User	E-mail Address	Role	Status	Last login
Brian Johnson	brian@test.com	Main Treasury	Login Locked Out	22 days ago
Charlie Brown		Main Treasury	Active	4 months ago
David Smith	dsmith@test.com	Main Treasury	Active	5 hours ago
Jack Wilson	jack@test.com	Main Treasury	Disabled	
Sally Smith	sally@test.com	Limited Access	Active	

An 'Add User' button is highlighted with a red box in the top right corner.

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.

The screenshot shows the 'New User' form. Fields include:

- FIRST NAME *: James
- LAST NAME *: Smith
- E-MAIL ADDRESS *: james@test.com
- PHONE COUNTRY *: United States
- PHONE *: (808)548-4847
- LOGIN ID *: jamesmith123
- PASSWORD *: [masked]
- CONFIRM PASSWORD *: [masked]
- USER ROLE: Main Treasury (selected from a dropdown menu)

On the right side, there are 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.
- Password must contain a minimum of 1 upper case characters.

A 'Save' button is highlighted with a red box in the bottom right corner.