

Remote Deposit Capture User Administration Guide

User Admin – User Admins will set up user profiles and establish privileges and roles for users, allowing them to complete tasks within the application. These administrators are capable of the following:

- Creating, deleting, enabling, or disabling a user
- Assigning specific privileges and roles to a user for completing tasks

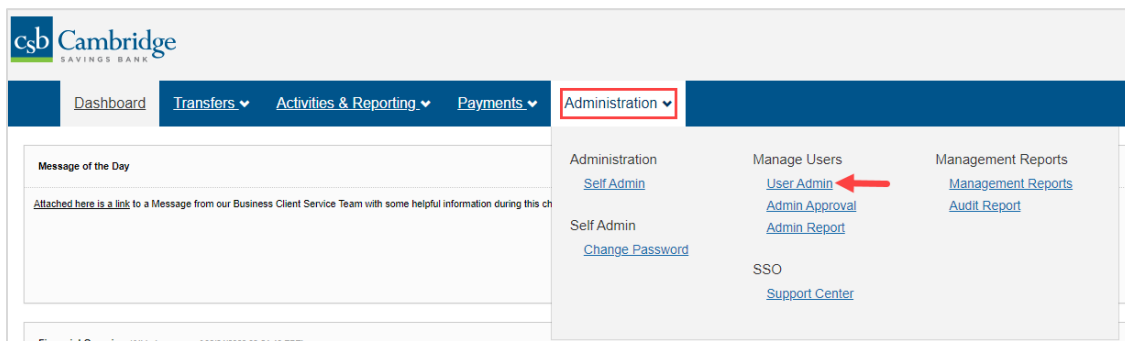
User – A person within your organization who is responsible for completing tasks within the application, as designated by the User Admin. Responsibilities for a user may include:

- Setting up customer profile information.
- Editing transaction details.
- Generating reports.
- Processing transactions.

The User will first need to be created within Business Online Banking before creating their user profile in the Remote Deposit Capture platform.

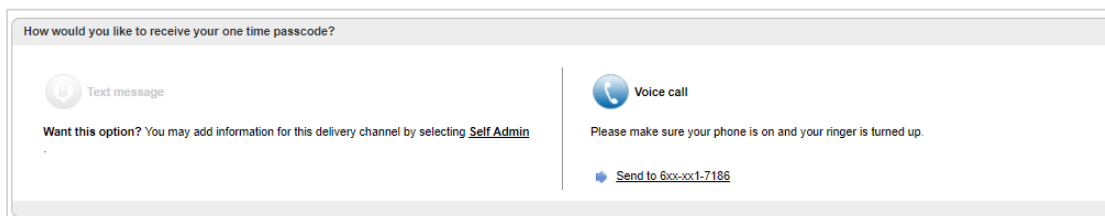
Creating a User in Business Online Banking:

Step 1: Log in to Business Online Banking, from the **Dashboard** homepage, click the **Administration** tab and select **User Admin** from the dropdown menu.

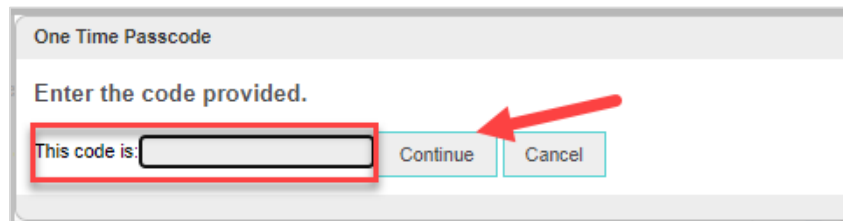


Step 2: For security purposes, you have to enter a One-Time Passcode before you're able to proceed with creating the new User.

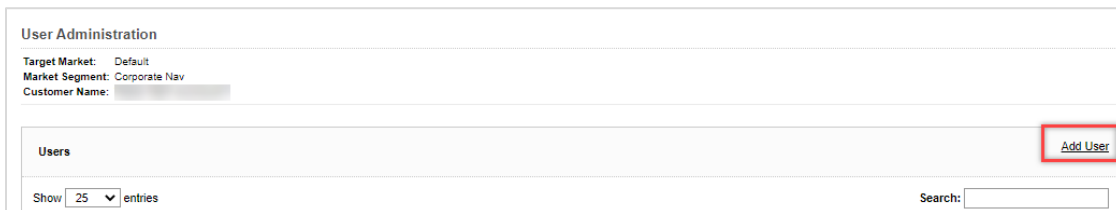
From the screen below, select the method in which you want to receive your One-time Passcode by clicking the **Send to** link under either Text Message or Voice Call. Please make sure your phone is on and accessible before you click the link.



Step 3: Your One-Time Passcode will be sent to you via the method you selected. **Enter** the code provided into the **This code is** field and click **Continue** to proceed.



Step 4: From the **User Admin** page, click the **Add User** link located on the top right side of the page to get started.

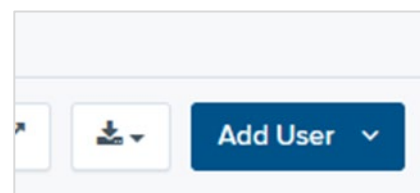
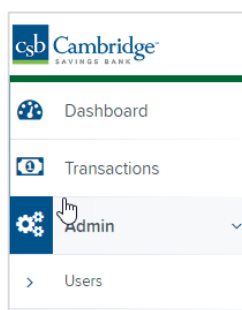


Step 5: On the **Add New User** page, the Company Administrator will need to :

1. Complete all of the required **User Login Information** fields that are highlighted in red
2. Check the **Generate Password** box
3. Select the appropriate User permissions under the **Service Info section**. For Remote Deposit Capture, select **Remote Deposit**.
 - (Administrators will have the ability to copy permission from another User by clicking the **Copy permissions from an existing user** dropdown box and selecting the User from who they want to copy permissions.)
4. Once all of the User information has been added, scroll to the bottom of the page and click the **Submit** button at the bottom of the page.
 - A system generated email will be sent to the new User with their password information at this time.
 - The Administrator who set up the new user will need to provide the user with their User Name.

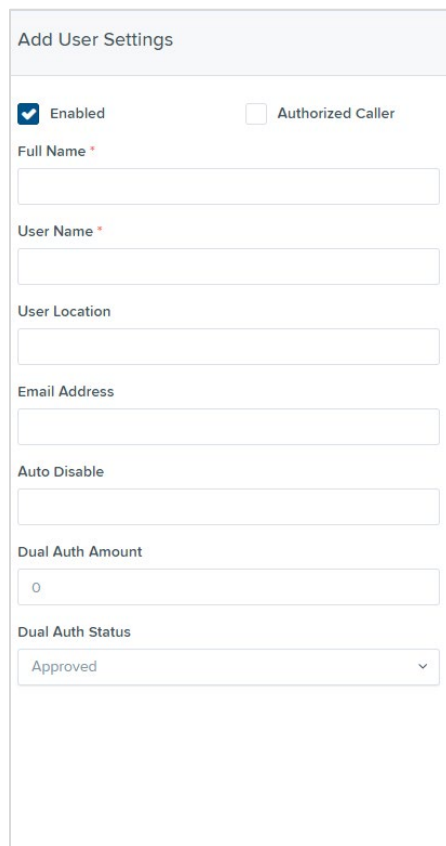
Creating a User in Remote Deposit Capture:

Step 1: Click **Admin** → **Users** → **Add User** (on the right-hand side) → **Business User**



Step 2: Complete the fields for *Add User Settings*. See screenshot below. Fields are:

- **Enabled** -- This will be checked off by default when you are creating a new user
- **Authorized Caller** – Not Applicable
- **Full Name** – Enter in the user’s name
- **User Name** – **Important: The user name needs to match the user name used to access Business Online Banking**
- **User Location** – This is an optional field.
- **Email address** – Enter in the user’s email address
- **Auto Disable** – Not Applicable
- **Dual Auth Amount** – Not Applicable
- **Dual Auth Status** – Not Applicable



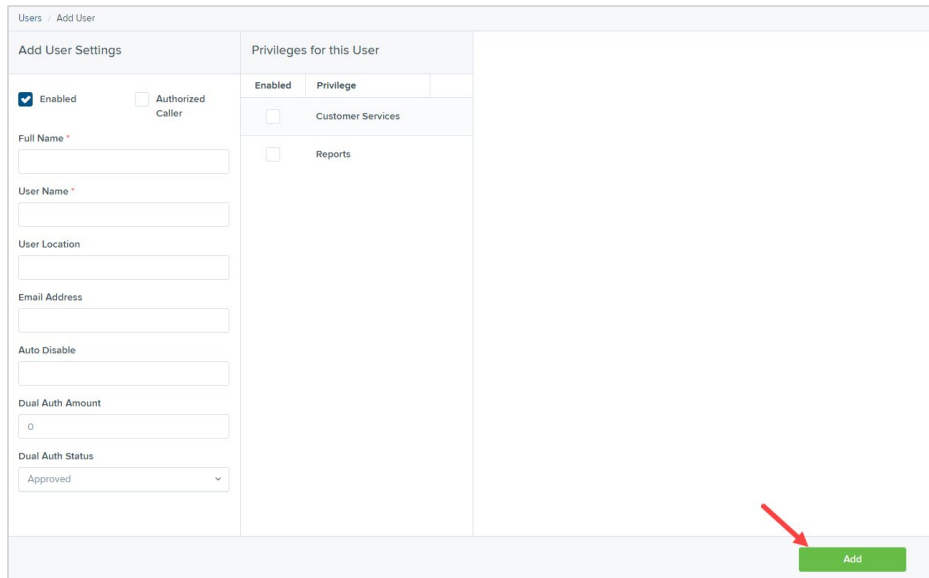
The screenshot shows a form titled "Add User Settings" with the following fields and options:

- Enabled
- Authorized Caller
- Full Name *
- User Name *
- User Location
- Email Address
- Auto Disable
- Dual Auth Amount (value: 0)
- Dual Auth Status (value: Approved)

Step 3: Select Privileges for the new user under the **Privileges for this User** column.

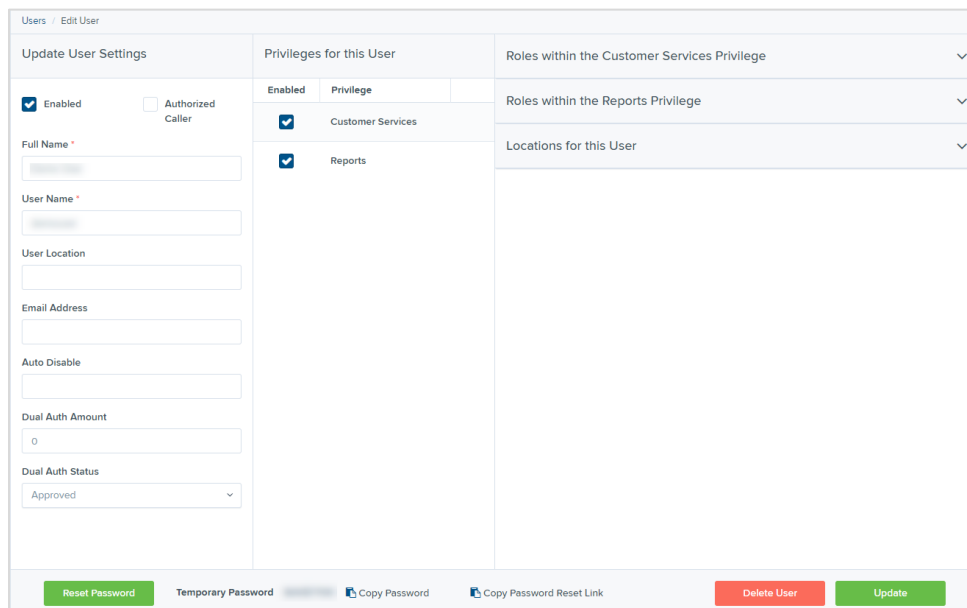
- **Customer Service** – Select this to give the user the ability to add/edit, customers, create deposits and run reports.
- **Reports** – Select this to give the user the ability to view and export reports.

Once you have selected privileges to provide to this user, click **Add**.



The screenshot shows the 'Add User' form. On the left, under 'Add User Settings', there are fields for 'Full Name', 'User Name', 'User Location', 'Email Address', 'Auto Disable', 'Dual Auth Amount', and 'Dual Auth Status'. The 'Enabled' checkbox is checked, and 'Authorized Caller' is unchecked. On the right, under 'Privileges for this User', there are two rows: 'Customer Services' and 'Reports', both with checked checkboxes. At the bottom right, a green 'Add' button is highlighted with a red arrow.

Step 4: On the right of the screen, *Roles* will appear based on the *Privileges* selected for the user in Step 3. Select the access level you would like to give the user.



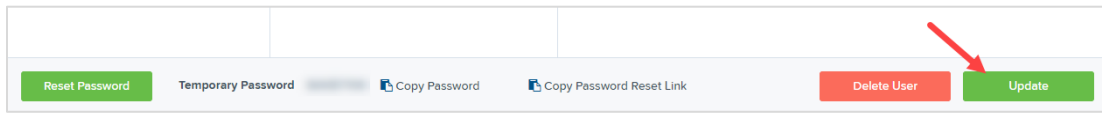
The screenshot shows the 'Edit User' form. The 'Update User Settings' section on the left is identical to the 'Add User' form. The 'Privileges for this User' section now has 'Customer Services' and 'Reports' selected. On the right, there are three dropdown menus: 'Roles within the Customer Services Privilege', 'Roles within the Reports Privilege', and 'Locations for this User'. At the bottom, there are buttons for 'Reset Password', 'Temporary Password', 'Copy Password', 'Copy Password Reset Link', 'Delete User', and 'Update'.

- **Roles within the Customer Services Privilege**

| Role | Definition |
|------------------------------|--|
| Accounting - Corporate | Allows a user to run reports, look at transaction details, edit transactions, view check images, and monitor and research transactions |
| RDC Admin | User can create, scan, and submit items as a transaction |
| RDC User | User can create, scan items, but not submit them as a transaction |
| View Debits & Credits Report | User can access the batch image file to print, save or view |


- **Roles within the Reports Privilege – Not Applicable**
- **Locations for this User –** Select the locations the customer should have access to deposit into and pull reports for.

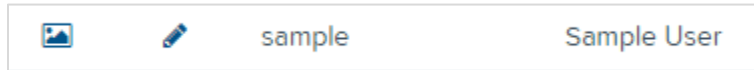
Step 5: When completed, click the **Update** on the bottom right to complete the set up.



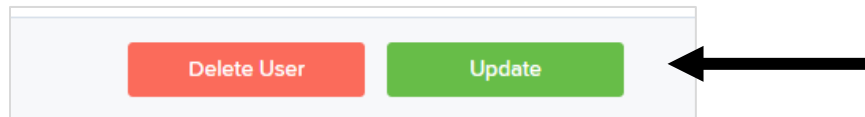
Note: On the bottom section of the screen you will see a Temporary Password that is generated automatically by the system. You can disregard this section of the screen as the user you created will be accessing Remote Deposit Capture through Business Online Banking and will not need this password.

Editing/Deleting a User Profile

Users can be edited after they have been created. From Admin -> Users, click the pencil button  to go to the Update User Settings screen.



When finished updating the user information, click the update button on the bottom right.



If you wish to delete the user, click the delete button. To delete a user, a popup box will display to confirm the deletion.

