

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

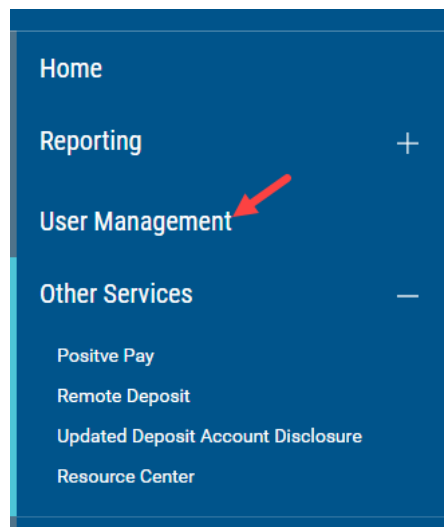
User – A person within your organization who is responsible for completing tasks within the application, as designated by the User Admin. Responsibilities for a user may include:

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

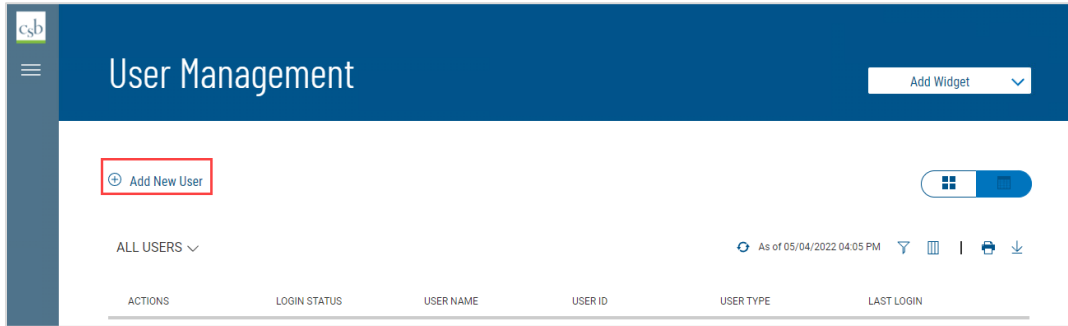
The User will first need to be created within Business Online Banking before creating their user profile in the Remote Deposit Capture platform.

Creating a User in Business Online Banking:

Step 1: Log in to Business Online Banking, click on the 3-line icon on the upper left corner just below the Cambridge Savings Bank logo to expand the side menu. From the side menu, click on **User Management** and select **User Admin** from the dropdown menu.



Step 2: From the **User Management** page, click the **Add New User** link located on the top left side of the page to get started.



Step 3: On the **Add New User** page, the Company Administrator will need to:

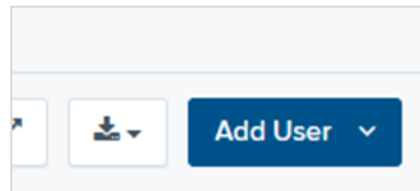
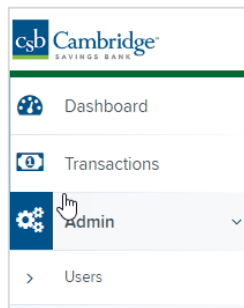
1. Complete all of the required fields on the **Define User** page. Click **Next**.
2. Select the appropriate User permissions on the **Assign Services** page.
 - For Remote Deposit Capture, navigate to **Others** and select **Remote Deposit**.
 - For Mobile Deposit, navigate to **Others** and select **Mobile**. You will be prompted to select the accounts which the user will be able to deposit into. *Note: This is only applicable if the Mobile Deposit service is enabled. Please reach out to your Relationship Manager for more information about adding this service.*
 - (Administrators will have the ability to copy permission from another User by clicking on the dropdown under **Permissions Copied From** and selecting the User from who they want to copy permissions.)

Once completed, click **Next**.

3. Once you have reviewed the User Information on the **Review User Information** page click the **Save** 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 ID

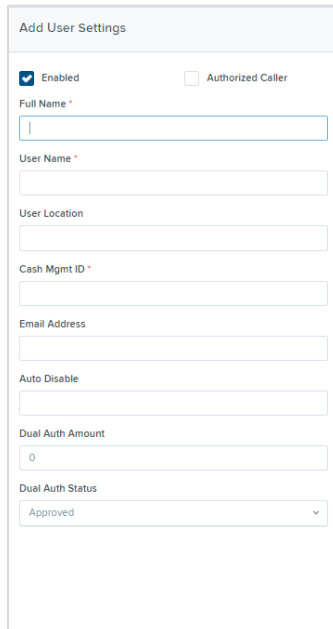
Creating a User in Remote Deposit Capture:

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:

Field	Definition
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 ID used to access Business Online Banking.
User Location	This is an optional field.
Cash Mgmt ID	Important: The Cash Mgmt. needs to match the User ID used to access Business Online Banking.
Email Address	Enter in the user's email address.
Auto Disable	Not Applicable
Dual Auth Amount	Not Applicable
Dual Auth Status	Not Applicable
Enable RDN	Not Applicable. Leave unchecked.



Add User Settings

Enabled Authorized Caller

Full Name *

User Name *

User Location

Cash Mgmt ID *

Email Address

Auto Disable

Dual Auth Amount

0

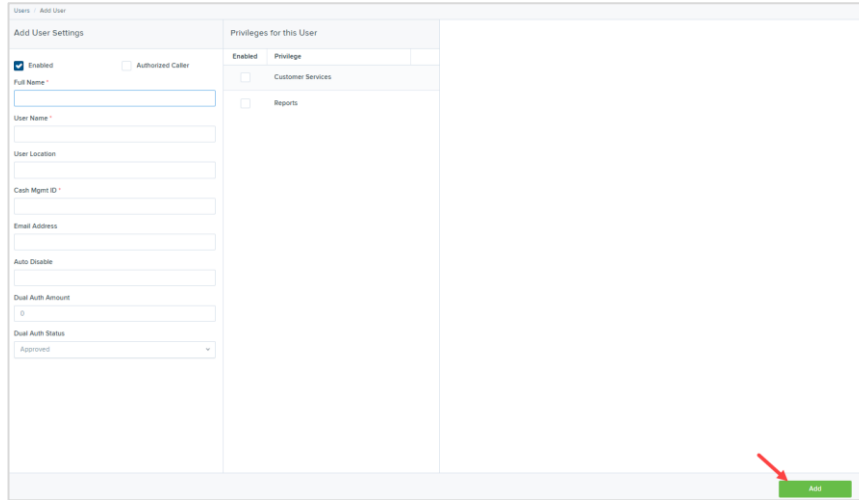
Dual Auth Status

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**.

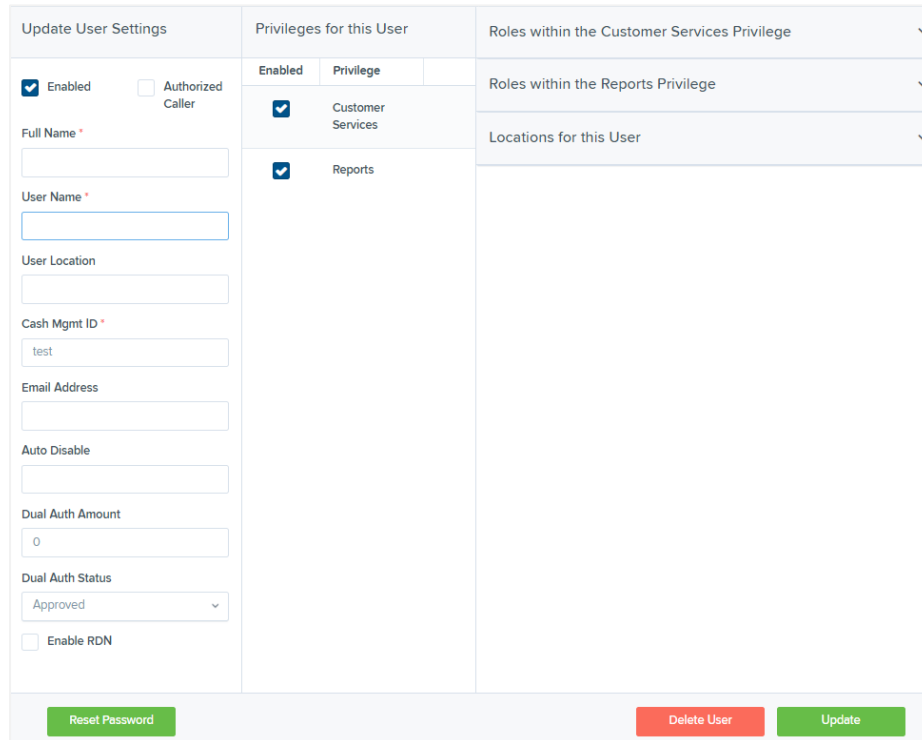


The screenshot shows the 'Add User' form. On the left is the 'Add User Settings' section with various input fields. On the right is the 'Privileges for this User' section with a table:

Enabled	Privilege
<input type="checkbox"/>	Customer Services
<input type="checkbox"/>	Reports

A red arrow points to the 'Add' button at the bottom right of the form.

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 'Update User Settings' form. The 'Privileges for this User' section is updated with 'Customer Services' and 'Reports' selected. On the right, three dropdown menus are expanded:

- Roles within the Customer Services Privilege
- Roles within the Reports Privilege
- Locations for this User

At the bottom of the form are three buttons: 'Reset Password', 'Delete User', and 'Update'.

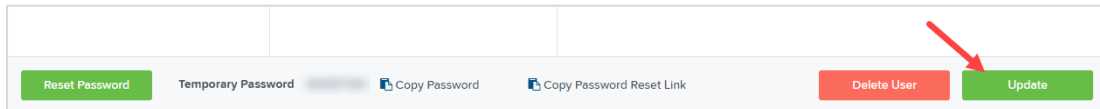
▪ **Roles within the Customer Services Privilege**

Role	Definition
Accounting	Allows a user to run reports, look at transaction details, edit transactions, view check images, and monitor and research transactions
Customer Data Privacy	User can view the page, generate report, and forget customer.
Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
mRDC	User can submit an item using Mobile Deposit. <i>Note: This is only applicable if the Mobile Deposit service is enabled. Please reach out to your Relationship Manager for more information about adding this service.</i>
RDC Admin	Remote Deposit user can create, scan, and submit items as a transaction
RDC User	Remote Deposit user can create, scan items, but not submit them as a transaction
Reconciliation Report	User can view the reconciliation report.

▪ **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.



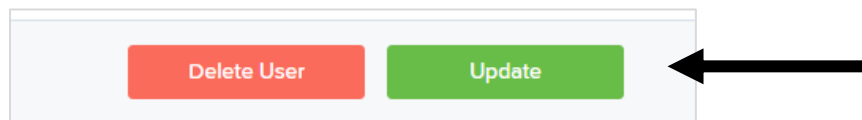
Note: On the bottom section of the screen you will see a Temporary Password that is generated automatically by the system. You can disregard this section of the screen as the user you created will be accessing Remote Deposit Capture through Business Online Banking and will not need this password.

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.

