Exchange

User Administration – General Navigation

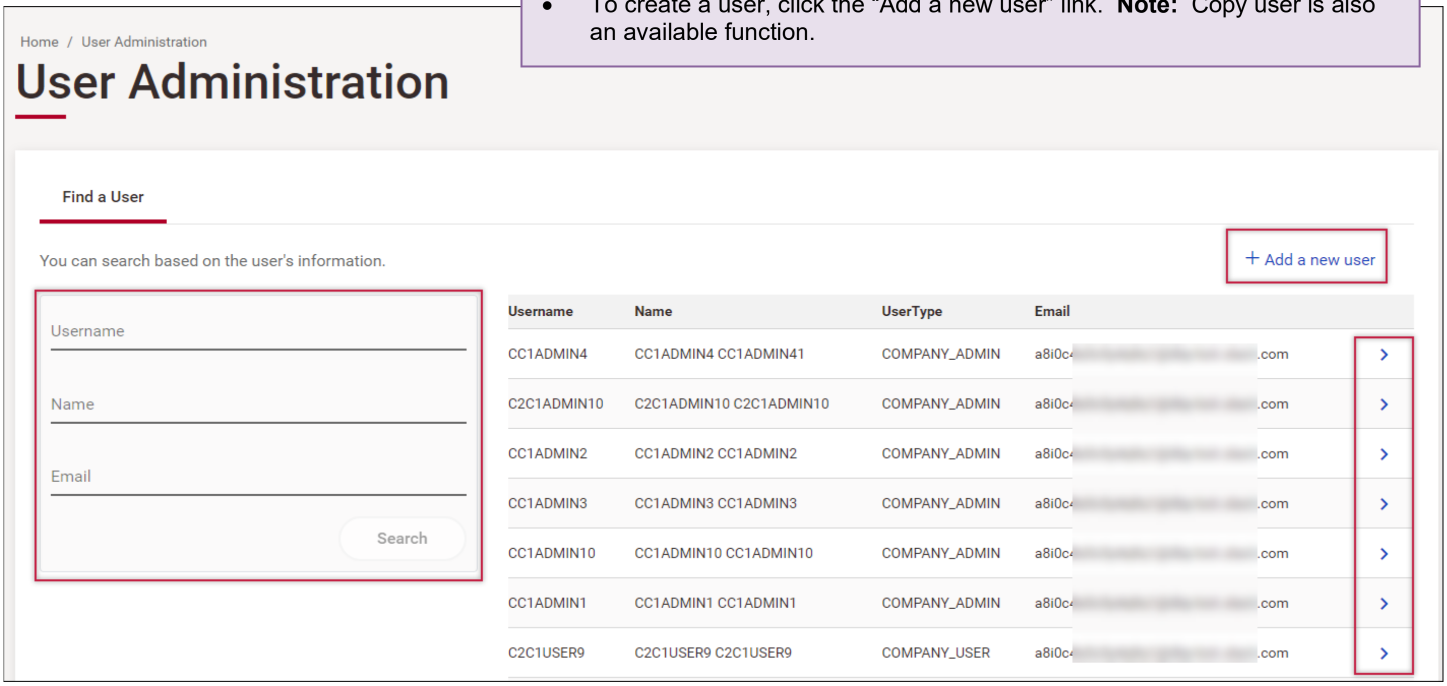
This Quick Reference Guide will assist you, as Exchange administrators in providing general navigation of Exchange User Administration and what you can see. User Administration also allows you to create and modify company users as well as assign detailed permissions and functionality.

Note: Please be sure to review the individual guides for Business Bill Payment, ACHAlert Positive Pay and/or Payments and Reporting for permission instructions specific to those services.

To create or modify a User, from the Administration menu, select “User Administration”.

The User Administration landing page displays all users setup under your company.

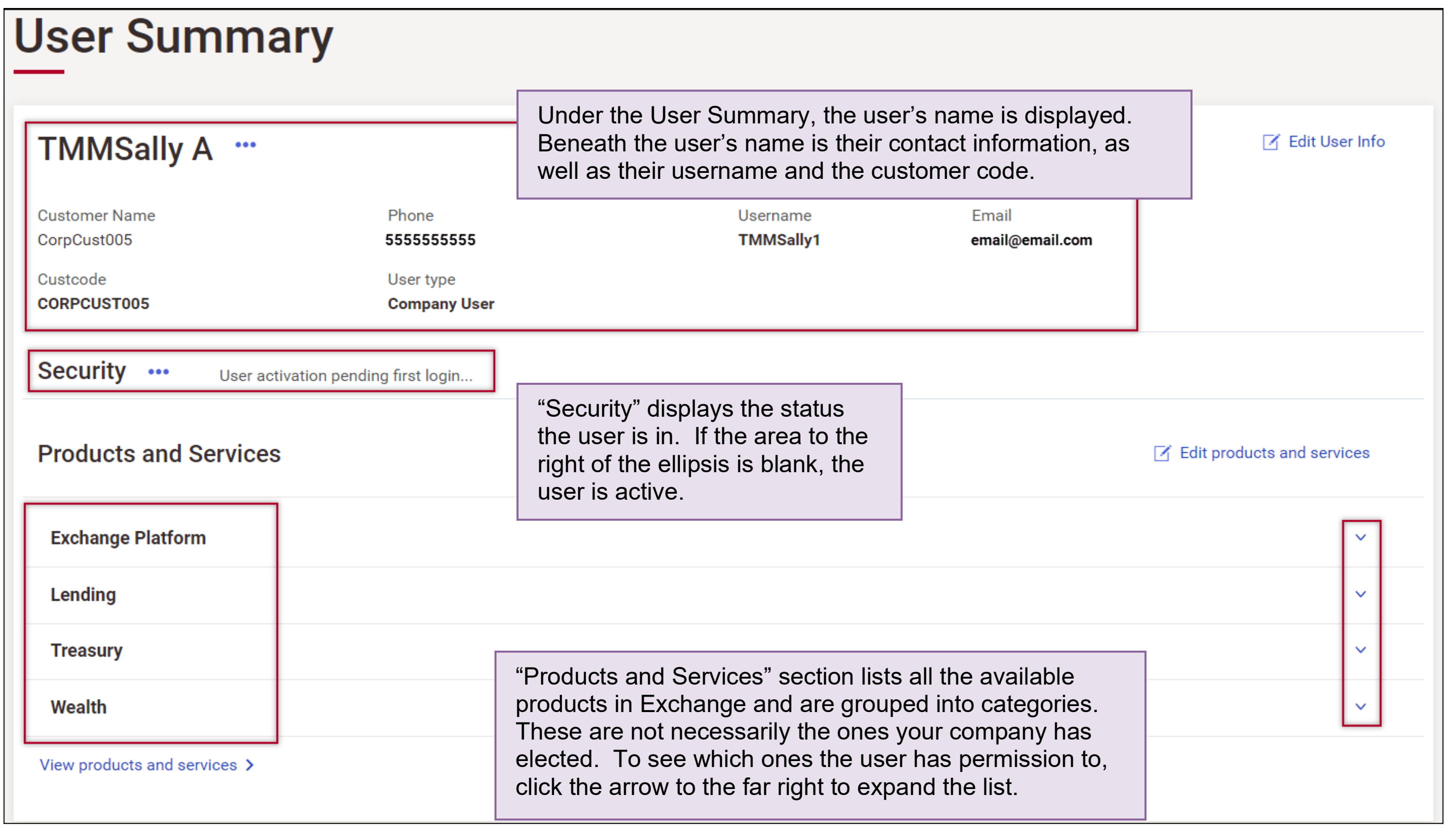
- You can view current user permissions by clicking the arrow to the right of the user information.
- You may also search for a user by Username, Name or Email.
- To create a user, click the “Add a new user” link. **Note:** Copy user is also an available function.

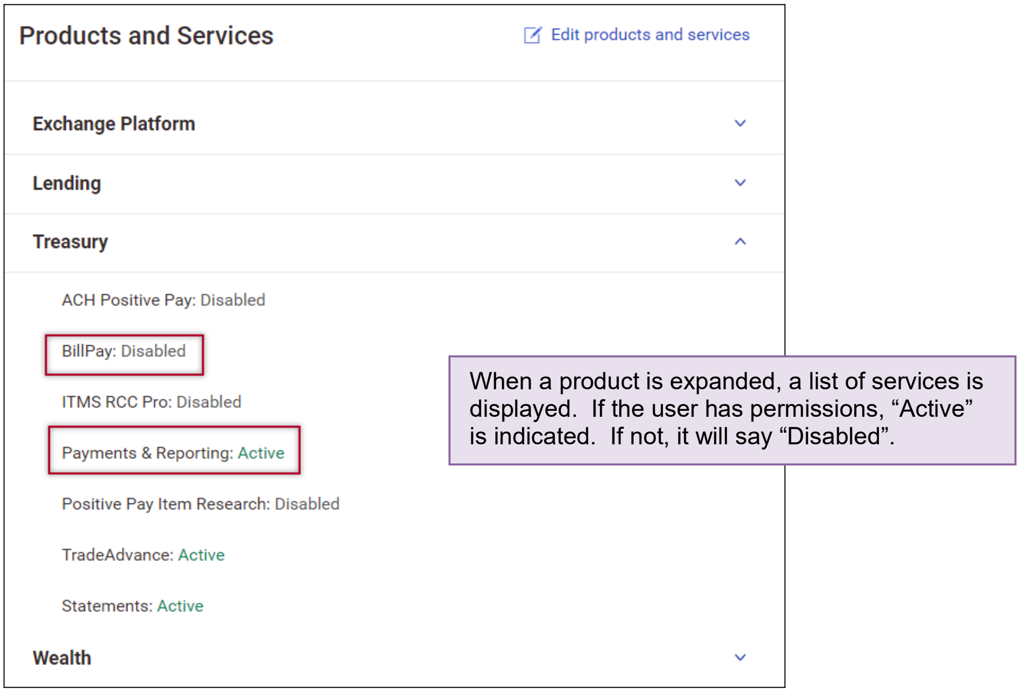


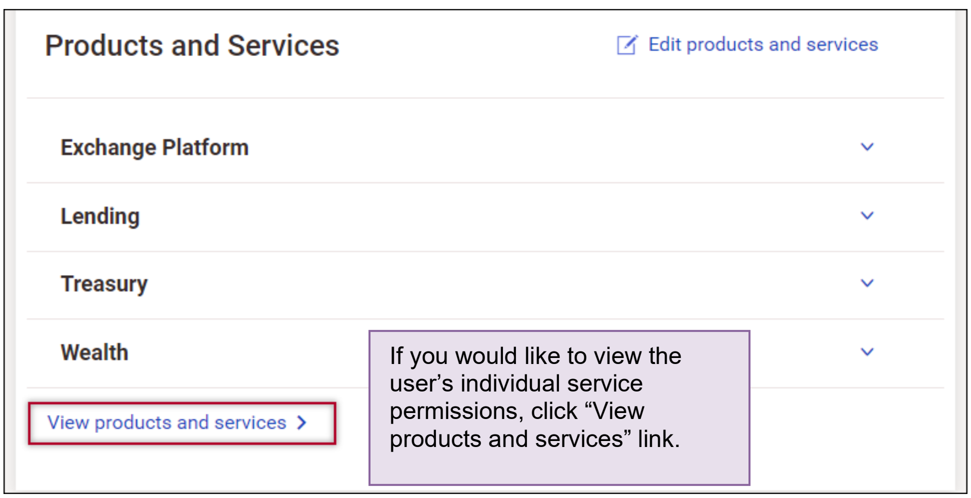
Under the User Summary, the user’s name is displayed. Beneath the user’s name is their contact information, as well as their username and the customer code.

“Security” displays the status the user is in. If the area to the right of the ellipsis is blank, the user is active.

“Products and Services” section lists all the available products in Exchange and are grouped into categories. These are not necessarily the ones your company has elected. To see which ones the user has permission to, click the arrow to the far right to expand the list.




Products and Services
Edit products and services
Exchange Platform
Lending
Treasury
ACH Positive Pay: Disabled
BillPay: Disabled
ITMS RCC Pro: Disabled
Payments & Reporting: Active
Positive Pay Item Research: Disabled
TradeAdvance: Active
Statements: Active
Wealth
When a product is expanded, a list of services is displayed. If the user has permissions, "Active" is indicated. If not, it will say "Disabled".


Products and Services
Edit products and services
Exchange Platform
Lending
Treasury
Wealth
View products and services
If you would like to view the user's individual service permissions, click "View products and services" link.

After clicking "View products and services" from the prior screen, you are brought the Setup a user screen. Permissions cannot be altered here, although it does give the appearance.

The list here only provides those products for which your company has chosen, not necessarily what the user is permissioned.

- Click the arrow to the right of each product, which will display a list of services for that product.
- If the slider next to the service is blue, the user has permission. Greyed out, they do not have access.
- Click arrow next to the service to review detailed permissions for that service.
- Be sure to review any notes identified next to services listed for additional instructions.
- Please visit the individual service User Administration Guides for details related to specific permissions.