

User guide

NetImage External User



Table of contents

Introduction	2
Logging In.....	3
Multi-Factor Authentication	4
Passwords.....	7
Menu Bar.....	8
Queries	9
Managed Advanced Queries	9
Search Criteria	10
Query Field Definitions	11
Results Grid Definitions	11
Item Search.....	12
Actions.....	13
Overlay	13
Exporting	13
Troubleshooting	14

Welcome to NetImage

Introduction

NetImage is your passage way to view check images drawn on your account(s). In addition, deposit ticket images and their offsets are also available to you.

New users to NetImage must access the application within 10 calendar days from creation or they are automatically “locked out”. When reactivated, the 10 day clock starts again.

To maintain continuous access, you must login to NetImage at least once during any 90 day period to avoid being automatically “locked out”. Should this occur and you are reactivated by the Bank, you have three calendar days to login or your access is again locked. If you are locked out, contact your Treasury Client Services Professional.

A NetImage URL is provided for each BOK Financial bank. If your company has accounts across our footprint, user names are provided for each bank URL. A single URL and login to access all is not currently available.

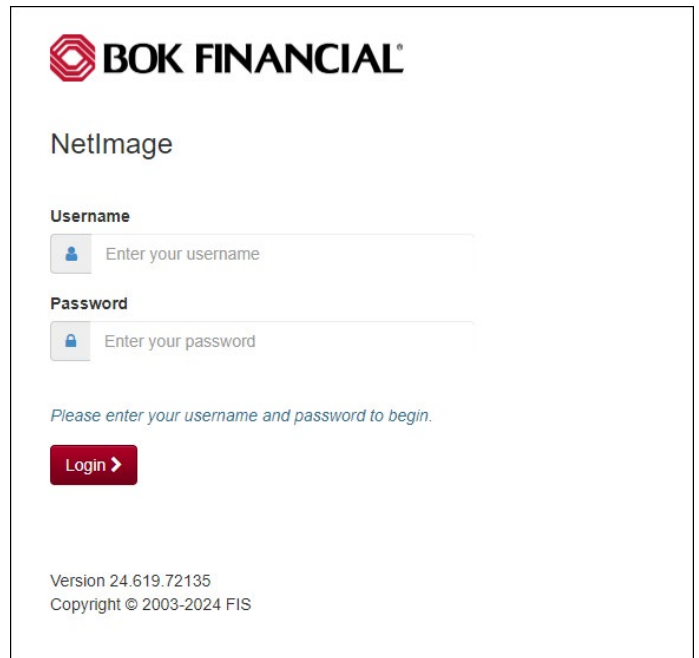
- **Bank of Albuquerque** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801338#!/login>
- **Bank of Oklahoma** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801341#!/login>
- **Bank of Texas** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801339#!/login>
- **BOK Financial Arizona** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801336#!/login>
- **BOK Financial Arkansas** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801340#!/login>
- **BOK Financial Colorado** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801337#!/login>
- **BOK Financial Kansas City** <https://netimagelr14.fisglobal.com/NetImage/Default.aspx?entity=801335#!/login>

Logging In

Login Page

To log into NetImage:

- Launch the proper URL by copying and pasting from the prior page into your web browser.
- Once the login screen appears, enter your “Username”, “Password” and click “Login”. This information was provided by Bank. You must change your password.
- After you have changed your initial password, you will login again with that new password.
- You will then be required to authenticate each time you login.
- After authentication, the home screen will appear.



The screenshot shows the BOK Financial NetImage login interface. At the top left is the BOK Financial logo. Below it, the text "NetImage" is displayed. There are two input fields: "Username" with a person icon and "Password" with a lock icon. Below the password field is a blue link that says "Please enter your username and password to begin." At the bottom left of the form area is a red "Login" button with a right-pointing arrow. At the bottom right, the version number "Version 24.619.72135" and copyright information "Copyright © 2003-2024 FIS" are listed.

Logout

Always remember to log out when finished using NetImage in order to prevent unauthorized access to the system. To log out of the system, click the “Logout” icon located in the upper-right corner of the program menu bar as shown below.

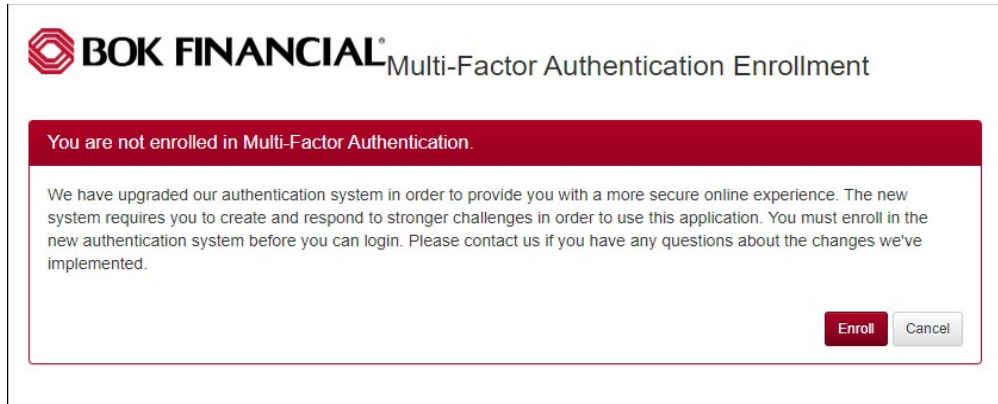


The screenshot shows the top menu bar of the NetImage application. The bar is red and contains the text "NetImage" and "Item Research" with a dropdown arrow. On the right side, there are menu items for "Help", "Tools", a user profile icon, and a red square icon with a white right-pointing arrow, which is the "Logout" button. Below the menu bar, there is a search area with a "Clear" button, a "Search" button with a right-pointing arrow, and a "Start Date" field with the value "8/19/2024" and a calendar icon.

Multi-Factor Authentication

1st Time Login

Once you have entered your username, password and clicked login, you must set up your Multi-Factor authentication. Click the "Enroll" button to get started.



BOK FINANCIAL Multi-Factor Authentication Enrollment

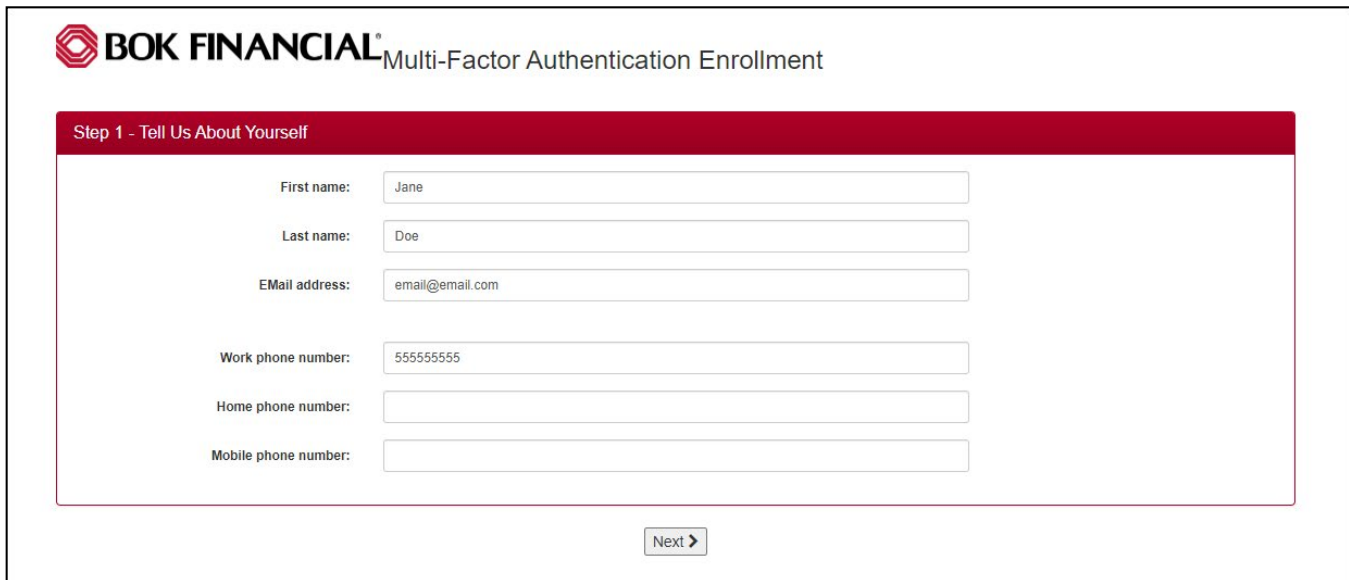
You are not enrolled in Multi-Factor Authentication.

We have upgraded our authentication system in order to provide you with a more secure online experience. The new system requires you to create and respond to stronger challenges in order to use this application. You must enroll in the new authentication system before you can login. Please contact us if you have any questions about the changes we've implemented.

Enroll Cancel

Step 1

In the fields of Step 1 - Tell Us About Yourself, input your "First name", "Last name", "Email address" and at least one "phone number" (one number is required). Click "Next" to move to Step 2.



BOK FINANCIAL Multi-Factor Authentication Enrollment

Step 1 - Tell Us About Yourself

First name:

Last name:

E-mail address:

Work phone number:

Home phone number:

Mobile phone number:

Next >

Multi-Factor Authentication

Step 2

- Now, create a “Security phrase”, must be at least 20 characters.
- Create three “Questions” with corresponding “Answers”. Be sure to use questions and answers that are easy for you to remember, no special characters and it is case sensitive.
- Click “Next” once all fields on this screen are complete.

BOK FINANCIAL Multi-Factor Authentication Enrollment

Step 2 - Create Your Security Phrase & Questions

Security phrase:
Field is required

Question 1:
Field is required

Answer 1:
Field is required

Question 2:
Field is required

Answer 2:
Field is required

Question 3:
Field is required

Answer 3:
Field is required

[< Previous](#) [Next >](#)

Step 3

Verify the content you entered. Click “Confirm” if everything is correct. If there are mistakes, click “Previous” to make corrections. Once you click “Confirm” you will receive an email confirming enrollment.

BOK FINANCIAL Multi-Factor Authentication Enrollment

Step 3 - Review & Confirm Your Enrollment

Name: First & Last Name

E-Mail address: email@email.com

Phone numbers: 5555555555

Security phrase: The sky is blue

Question 1: What color is grass?
Answer 1: green

Question 2: What color is the sky?
Answer 2: blue

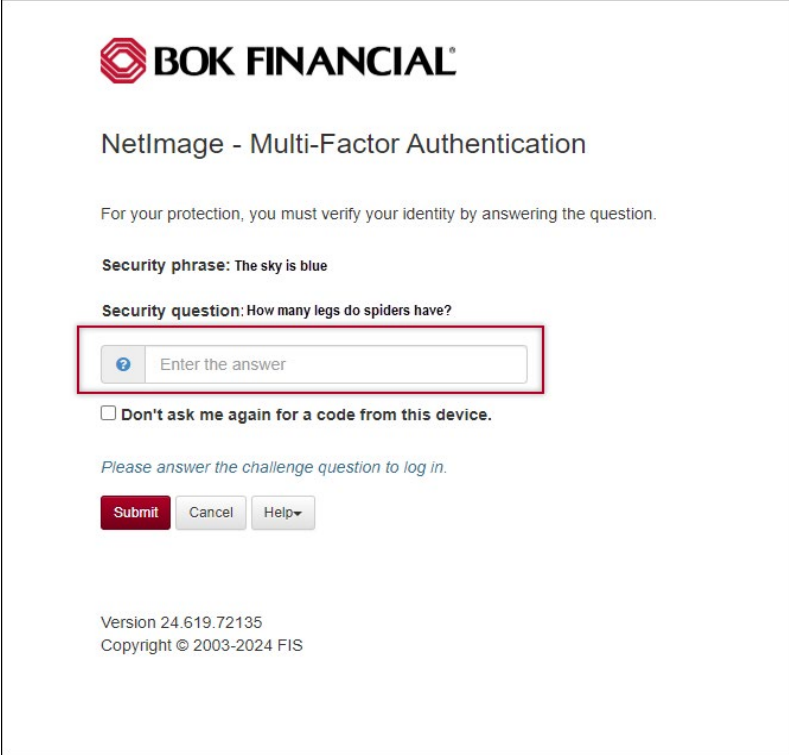
Question 3: How many legs do spiders have?
Answer 3: eight

[< Previous](#) [Confirm](#)

Multi-Factor Authentication

Going Forward

Each time you log into NetImage, you must answer one of your security questions, prior to accessing the system. If you answer incorrectly three times, you will be locked out of NetImage.



The screenshot shows the BOK Financial NetImage Multi-Factor Authentication interface. At the top left is the BOK Financial logo. The title is "NetImage - Multi-Factor Authentication". Below the title, it states: "For your protection, you must verify your identity by answering the question." The security phrase is "The sky is blue". The security question is "How many legs do spiders have?". There is a text input field with a question mark icon and the placeholder text "Enter the answer". Below the input field is a checkbox labeled "Don't ask me again for a code from this device." Below the checkbox is the instruction "Please answer the challenge question to log in." At the bottom of the form are three buttons: "Submit" (in red), "Cancel", and "Help" (with a dropdown arrow). At the very bottom of the page, it says "Version 24.619.72135" and "Copyright © 2003-2024 FIS".

Passwords

Change Password

User passwords are required to be changed every 90 days by the NetImage system. Notification messages are displayed beginning five (5) days before the password is set to expire. If you do not change your password before it expires, you are locked out of the system. When it is time to change your NetImage password, the below screen appears immediately after entering your login information.

BOK FINANCIAL

NetImage

Username
username

Password
Enter your password

New Password
New Password

Confirm Password
Confirm Password

*You are required to change your password at first logon.
Your password expires every 90 days~The password must be at least 8 characters long.~The password requires at least 3 of the 4 following types of characters. Upper Case Alpha, Lower Case Alpha, Numeric and Special Character.*

Change Password >

Perform the following steps to change your password

- **Password** = Enter your current password.
- **New Password** = Enter your new desired password.
- **Confirm Password** = Enter the new password a second time to confirm.
 - **Requirements** = All passwords must meet the following requirements:
 - 8 - 10 characters in length
 - At least three of the four character types are required:
 - At least one special character
 - One upper case letter
 - One lower case letter
 - One number
- Click the “Change Password” button to accept your new password.
- Once your password is changed, you are directed back to the login screen where you will see the message that your password has been changed.
- Login again using your new password.

BOK FINANCIAL

NetImage

Username
username

Password
Enter your password

Your password has been changed.

Login >

Version 24.804.214804
Copyright © 2003-2024 FIS

Menu Bar

The top red menu bar provides some of the actions that can be performed in NetImage.

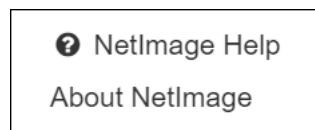


Item Research

Enables you to search NetImage using “Item Research” features by inputting certain criteria to generate search results. Results can include deposit tickets along with their offsets as well as checks drawn on your accounts. Item Research is automatically opened by default after you login.

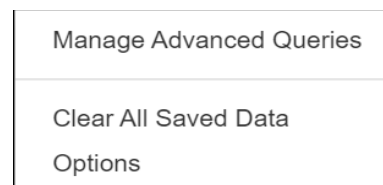
Help

- **NetImage Help** = opens the NetImage User Guide.
- **About NetImage** = provides NetImage copyright information.



Tools

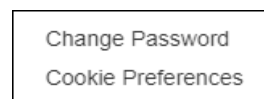
- **Manage Advanced Queries** = is used to create custom queries.
- **Clear All Saved Data** = If you have multi search fields filled to query, this will reset all the fields back to the default.
- **Options** = allows you to set general options.



User Icon



- **Change Password** = change your password at any time.
- **Cookie Preferences** = manage site cookie preferences.



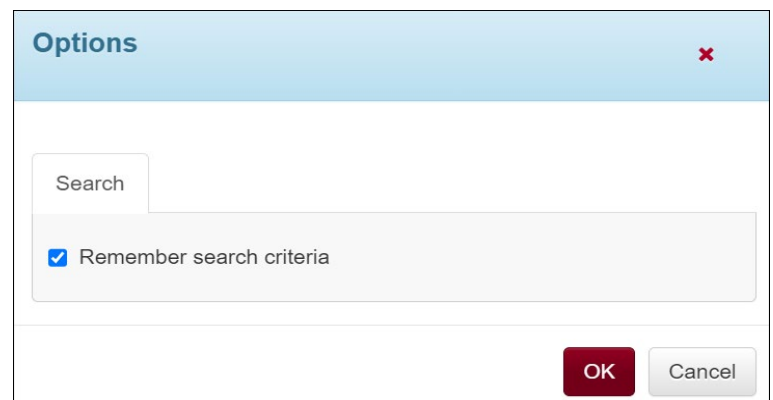
Logout – click the “Logout” icon to close NetImage.



Options

Remember search criteria. Select this check box if you want the system to remember your search criteria from one session to the next. To save, click “OK”.

For example, if you want the system to remember the date value you provided for the last search, select this check box. If this check box is cleared, the system presents you with blank search fields (and the default of the current date).



Queries

Manage Advanced Queries

You can create custom queries using the “Manage Advanced Queries” feature which is accessed from the “Tools” drop-down menu. For example, you want to search for items in a specific range such as, amounts \leq \$100.

The screenshot shows the 'Advanced Query Manager' interface. At the top, there are two dropdown menus: 'Entity:' (callout 1) and 'Query:' (callout 8). Below them are four buttons: 'Save' (dark red), 'Clear' (dark red), 'Delete' (dark red), and 'Save As:' (orange), followed by a text input field for 'Save as name' (callout 5). Below this is a table with three columns: 'Field' (callout 2), 'Condition' (callout 3), and 'Value' (callout 4). The table has six rows, each with a dropdown menu in the 'Field' column, a dropdown menu in the 'Condition' column, and a text input field in the 'Value' column. At the bottom left, there is a 'Close' button (callout 7).

Follow these steps to create a custom query:

1. Select an “Entity” (Bank e.g., BOK Financial).
2. Select the “Field(s)” you want to include (e.g., Amount).
3. Set the “Conditions” (e.g., Equals).
4. Enter the “Values” (e.g., \$100).
5. Create a name for your custom “Query” (e.g., “Kenya’s Test”).
6. Save the query with “Save As”. Click “OK” to the confirmation window.
7. Click “Close” when you are done creating your custom query.

You will be able to use this query by selecting it from the “Predefined SQL” field during an item search. When you search, it will display all items matching that criteria.

8. You may also edit or maintain your queries by going back into “Manage Advanced Queries” option and choosing the query you want to edit/maintain from the “Query” drop down.

Note: Custom queries you create are only visible and available to you.

Queries

Search Criteria

Start Date: 8/22/2024

End Date: End Date

Account: 57072

Serial: Start End

Amount: Start End

RT: RT

DbCr: Debits & Credits

The left panel of the display screen is the criteria you can use to perform a search. This panel is customizable by clicking the “Options” icon.

In addition, you can customize the columns in the result grid that provides information about the results and image.

Query Fields

Simply select the check boxes of the fields you want to see and use in the criteria search panel. Then close the window.

Options

Query Fields Result Grid Fields

Select All

Description

RT

Serial

Result Grid Fields

Simply select the check boxes of the column headings you only want displayed in your results grid. Then click “OK” to save and close the window.

Some fields are system defaulted and are not found under Options. Definitions for these fields can be found on the next page.

Options

Query Fields Result Grid Fields

Select All

Account

Account Type

Amount

Date

DbCr

Description

Record Type

Row

RT

Serial

TC

OK

Queries

Query Field Definitions

- **Account** = account number, which is the drawn on account number, maybe your BOK Financial account number or that of another Financial Institution for a deposit item.
- **Amount** = the item amount being searched.
- **DbCr** = Db (Debit) is a withdrawal from an account or a deposit item. Cr (Credit) is a deposit.
- **Description** = not applicable.
- **End Date** = used for the date to end a search, the last or most recent date.
- **Predefined SQL** = this is a list of custom queries you have created and can select to use for your search.
- **RT** = Routing Transit Number - A nine digit code that identifies the financial institution on all checks and deposits and offset items.
- **Serial** = check number or value in the auxiliary field of a deposit slip (where the check number would normally be).
- **Start Date** = used for the date to begin a search, the oldest date.

Results Grid Definitions

- **Account** = Account number in the micro line of the item.
- **Account Type** = not applicable.
- **Amount** = the amount of the item.
- **Date** = calendar date the item posted to your account.
- **DbCr** = Db (false) is a withdrawal from an account or a deposit item. Cr (true) is a deposit.
- **Description** = not applicable.
- **Record Type** = indicates if item is a debit or credit item on us or a transit item (deposited item not drawn on us).
- **Row** = line item in the results.
- **RT** = Routing Transit Number - A nine digit code that identifies the financial institution on all on-us checks and deposits and offset items.
- **Serial** = check number or value in the auxiliary field of a deposit slip (where the check number would normally be).
- **TC** = not applicable.

Queries

Item Search

1. Input and/or select values in criteria fields and click “Search”. Click “Clear” to empty data selected or input in search fields. **Note:** When using a date range search, you must use more than one value with the account number, such as check number or amount.
2. All search results are listed to the right of the criteria fields in a results grid. Each row represents an item. **Note:** NetImage will only provide up to 1000 items in the grid per search.
3. When a row is selected the item is displayed in the grey area above the list. The first item listed is automatically displayed.
4. The list of symbols shown next to the image are used to change the view of the image.

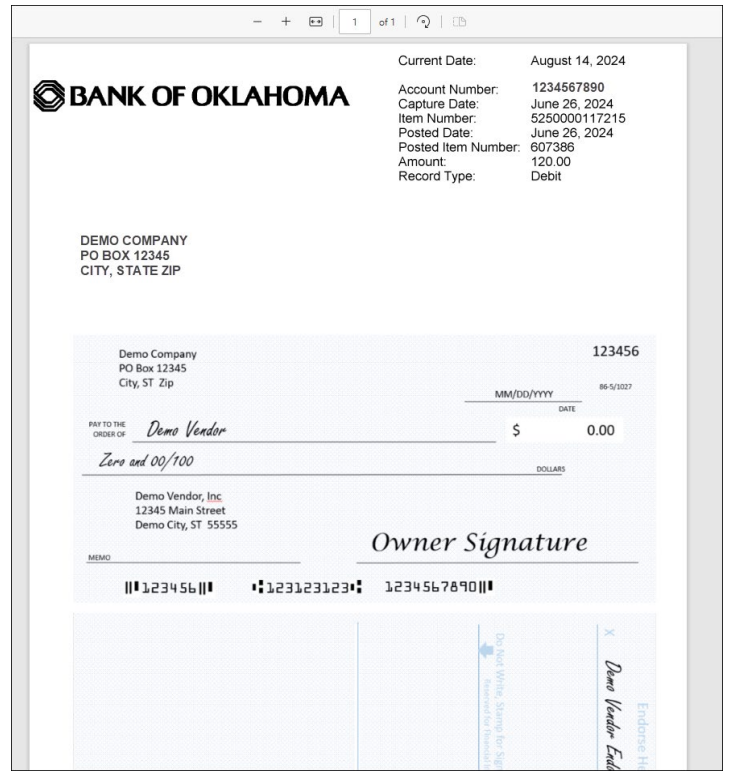
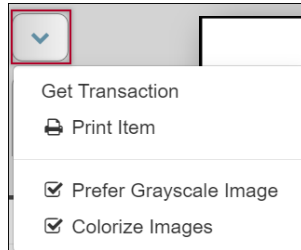
	Zoom In
	Zoom Out
	Reset Image to its original state
	Rotate Image
	Show back / front of image
	Invert Colors – black on white or white on black
	Colorize – change image color

Queries

Actions

Additional “Action” options are available when you click the down arrow button.

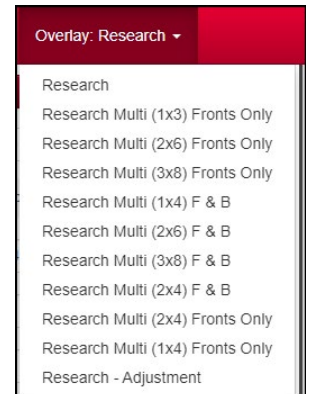
- **Get Transaction** = use this option to list all items included in the client deposit selected.
- **Print Item** = provides front and back of the image shown in PDF including additional details about the item, ready for printing.



Overlay

The “Overlay” menu option appears when multiple items are selected in the results grid. Selecting multiple items is done by holding the “CTRL” key and mouse clicking each row for export. Overlay allows you to choose how many images are displayed on a page and whether to include both front and back or front only. Overlay only applies when using the “Print” action.

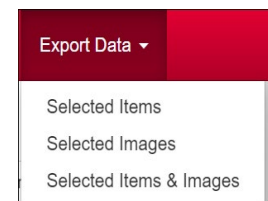
- **Research** = standard front and back image on a single page.
- **Research Multi Fronts Only** = front image only (column x row), ex. 1x3 is one column with three rows.
- **Research Multi F & B** = front and back of image (column x row), ex. 1x4 is one column with four rows.
- **Research - Adjustment** = similar to the Research standard, but also includes cash letter information.



Exporting

Selecting the “Export Data” allows you to export images and/or the results grid. Select all items in the grid you wish to export. Selecting multiple items is done by holding the “CTRL” key and mouse clicking each row for export.

- **Selected Items** = exports the items selected in the grid to an Excel file.
- **Selected Images** = exports images of the items selected into a zip file.
- **Selected Items & Images** = exports both an Excel file list and images both into a zip file.

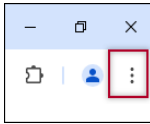


Troubleshooting

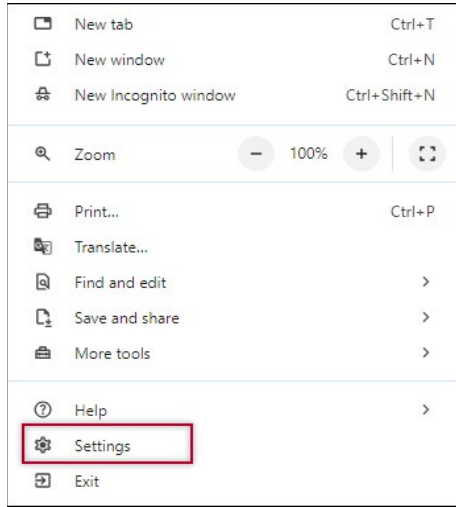
Error Message at login

In some instances users may receive a “Time Out” error message when trying to login to NetImage. To correct this error, a browser setting must be adjusted. This will apply to all browsers, examples below are of Edge and Chrome.

Chrome

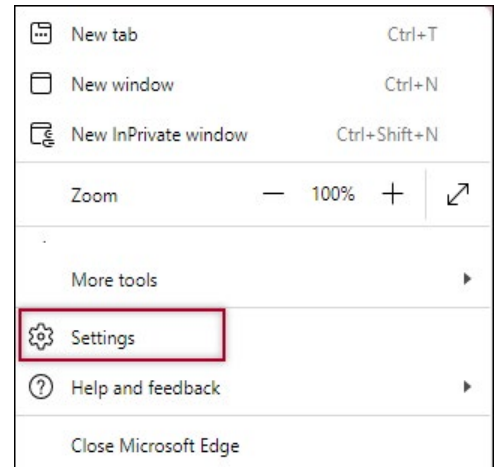
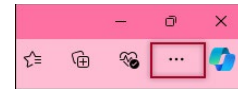


Click the “Ellipsis” to the far right of your browser to expose the menu.



Select “Settings” from the menu.

Edge



- Select “Languages” from under the “Settings” menu.
- Under “Preferred Languages” make sure English (United States) is added.
- Once added or if it is already in the list, click the “Ellipsis” to the right of it and select “Move to the top”.