

User Guide

Administration

BANKLINK.

Another Fiserv Connection

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February, 2006 Edition

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ABOUT ADMINISTRATION

Administration functions are of two types:


- Those functions that any user can perform, such as setting favorite accounts or changing an email address.
- Those functions that only a System Manager can perform, such as setting account names and permissions.

The headings in this document reflect this division.

 **Note:** Depending on product choices, additional configuration options may be available for individual modules. See the Administration section of those individual modules, if available, for additional information.

ELECTRONIC MAIL (ALL USERS)

The Electronic Mail module provides a quick, convenient way to send and receive correspondence regarding your accounts, transactions, and other services available to you.

 **Note:** The Electronic Mail module is not a POP/IMAP service; it is intended for use only in correspondence regarding your accounts and transactions, problems with the system, etc.

The Electronic Mail module consists of the following tabs:


Inbox: Use this tab to access received mail. You can view all messages, or only those that have not yet been read.

Outbox: Use this tab to send mail that has been saved for later delivery.

Compose: Use this tab to create and send messages.

Sent Items: This tab archives sent messages.

Deleted Items: This tab archives messages deleted from the Inbox. Messages deleted from the Outbox and/or Sent Messages tabs are not archived.

 **Note:** Stored messages are periodically purged from the system, so be sure to print important messages, or copy their contents to a local drive!

ACCESSING THE ELECTRONIC MAIL MODULE

To access the Electronic Mail module:

From the **Administration** menu, select **Electronic Mail**. The Electronic Mail screen is displayed.


READING INCOMING MESSAGES

To read incoming messages:

1. From the **Administration** menu, select **Electronic Mail**. The Electronic Mail screen is displayed.
2. Click the **Inbox** tab.
3. Click the **view** hyperlink associated with the message to be read. The message is displayed in a pop-up window.

From this screen, you can:

- Reply to the message
Click the **Reply** button. The pop-up window closes, and the Compose tab is displayed. See the “Composing Messages” section of this document for additional instructions.
- Print the message
Click the **Print** button.
- Delete the message
Click the **Delete** button, then confirm your selection. The pop-up window closes, and the message is deleted. Deleted messages can be accessed from the Deleted Items tab, from where they can be “undeleted,” if necessary.
- Close the pop-up window.
Click the **Close** button.

 **Note:** Click the **View Unread Only/View All** hyperlink at the bottom right-hand corner of the mail tab to toggle the view between unread messages and all messages. When all messages are displayed, the link text is **View Unread Only**; when only unread messages are displayed, the link text is **View All**.

DELETING MESSAGES

Messages deleted from the Inbox can be accessed from the Deleted Items tab; there, they can be "undeleted," if necessary. Messages on the Deleted Items tab are periodically purged from the system.

Messages deleted from other tabs are immediately purged, and are not available from the Deleted Items tab.

To delete messages:

From the main window:


- Single message
 1. Click the **delete** hyperlink associated with the message. A confirmation dialog box is displayed.
 2. Click the **OK** button. The message is deleted.
- Multiple messages
 1. Select the checkboxes associated with the messages to be deleted.
 2. Click the **Delete** button. A confirmation dialog box is displayed.
 3. Click the **OK** button. The selected messages are deleted.

From the pop-up window:

1. Click the **Delete** button. A confirmation dialog box is displayed.
2. Click the **OK** button. The selected messages are deleted.

UNDELETING MESSAGES

Messages deleted from the Inbox can be accessed from the Deleted Items tab. At any time, you can "undelete" them to return them to the Inbox.




 **Note:** Please be aware that deleted messages are periodically purged from the system.

To undelete messages:

1. Select the messages to be undeleted.
 - Single message
Click the **undelete** hyperlink associated with the message.
 - Multiple messages
 1. Select the checkboxes associated with the messages to be undeleted.
 2. Click the **Undelete** button.
A confirmation dialog box is displayed.
2. Click the **OK** button to return the message to the Inbox.


COMPOSING MESSAGES

To compose a message:

1. From the **Administration** menu, select **Electronic Mail**. The Electronic Mail screen is displayed.
 2. Click the **Compose** tab.
 3. In the **To** field, enter the recipient's name.
 **Note:** Internet email addresses ("johnsmith@anycorp.com") are not supported.
 4. From the **At** drop-down list, select a department name.
 5. In the **Subject** field, enter a message subject.
 6. *[Optional]* In the **CC** field, enter any additional recipient names.
 7. Enter a message in the main text area.
 **Note:** Total entry length must be less than 1700 characters (about 250 words).
 8. Click the **Send** button. The Submit Verification screen is displayed.
 9. In the **Enter your password for submit** field, enter your transaction password.
 10. Click the **Verify** button. The message is sent, and a confirmation message is displayed.
 **Note:** If the message is not delivered for any reason, it will be stored in the Outbox, and may be modified and/or manually submitted at a later time.
- [Optional]* Click the **Save** button to save the message in the Outbox for later editing and delivery.

WORKING WITH ARCHIVED MESSAGES

Saved messages can be accessed from the Outbox tab.


 **Note:** Archived messages are periodically purged from the system, so be sure to print important messages, or copy their contents to a local drive!

To work with a composed message saved for later editing and/or delivery:

1. From the **Administration** menu, select **Electronic Mail**. The Electronic Mail screen is displayed.
2. Click the **Outbox** tab.
3. Use the hyperlinks associated with the desired message:
 - To send the message, click the **send** link.
 - To modify the message, click the **modify** link. The Compose tab is displayed, its fields populated with the message contents.
 - To view the message in a pop-up window, click the **view** link.
 - To print the message, click the **print** link.
 - To delete the message, click the **delete** link, then confirm the deletion in the confirmation dialog box.

WORKING WITH SENT MESSAGES

Sent message can be accessed from the Sent Messages tab.

 **Note:** Archived messages are periodically purged from the system, so be sure to print important messages, or copy their contents to a local drive!

To work with a sent message:

1. From the **Administration** menu, select **Electronic Mail**. The Electronic Mail screen is displayed.
2. Click the **Sent Items** tab.
3. Use the hyperlinks associated with the desired message:
 - To view the message in a pop-up window, click the **view** link.
 - To print the message, click the **print** link.
 - To delete the message, click the **delete** link, then confirm the deletion in the confirmation dialog box.

SETTING USER PREFERENCES (ALL USERS)

Any user can set favorite applications, set favorite accounts, enable and disable the system's Item help feature, and change email addresses. Each of these options is explained in its section.

SETTING FAVORITE APPLICATIONS

Favorite Applications are displayed in the Favorite Applications pane on the Home Page, giving you one-click access to frequently used modules.

To set favorite applications:

1. From the **Administration** menu, select **Preferences**. The Administration screen is displayed.
2. On the Administration screen, select the **Favorite Applications** tab.
3. From the **Application #1** drop-down list, select the application to be listed first in the Favorite Applications pane.

[Optional] Add up to five additional applications to the list by making selections from the **Application #2** through **Application #6** drop-down lists.

4. Click the **Submit** button. A confirmation message is displayed.

When you return to the Home Page, the selected links are displayed in the Favorite Applications pane. Click any **Favorite Application** link to access that module directly.

SETTING FAVORITE ACCOUNTS

If available, Favorite Accounts appear in the Favorite Accounts pane on the Home Page, giving you one-click access to the Account Detail report for up to six accounts.

If available, Favorite Accounts appear in the Favorite Accounts pane on the Home Page, giving a quick view of account information.

To set Favorite Accounts:

1. From the **Administration** menu, select **Preferences**. The Administration screen is displayed.
2. On the Administration screen, select the **Favorite Accounts** tab.
3. From the **Balance Type** drop-down list, choose the type of balance to be reflected in the report (Available, Collected, or Ledger).
4. From the **Account #1** drop-down list, select the account to be listed first in the Favorite Accounts list.
[Optional] Add up to five more accounts to the list by selecting from the **Account #2** through **Account #6** drop-down lists.
5. Click the **Submit** button. A confirmation message is displayed.

When you return to the Home Page, the selected accounts are displayed as hyperlinks in the Favorite Accounts pane. Click any **Favorite Account** link to display the Account Detail report for that account.

ENABLING/DISABLING ITEM HELP


Where available, Item help displays field-level context sensitive information about fields when the cursor is inside those fields.

To enable or disable Item help:

1. From the **Administration** menu, select **Preferences**. The Administration screen is displayed.
2. On the Administration screen, select the **Other Preferences** tab.
3. Select or deselect the **Show Item Help** checkbox. If the checkbox is selected, Item help is enabled.
4. Click the **Submit** button. A confirmation message is displayed when your configuration change has been saved.

ENABLING/DISABLING DISPLAY OF ACCOUNT NAMES/TITLES

To make it easier to identify accounts, you can toggle the presence or absence of the **Account Name/Title** column on those screens where the feature is supported (such as Pending tabs). This column displays the name assigned to the account by the System Manager, or the title assigned to the account by the financial institution. System Manager–assigned names supercede financial institution–assigned titles.

 **Note:** This feature is limited in availability, depending on the functionality for which you access the system.

To enable and disable the display of account names or titles:

1. From the **Administration** menu, select **Preferences**. The Administration screen is displayed.
2. Do either of the following:
 - Select the **Show Account Names/Titles** checkbox to enable name/title display.
 - Deselect the **Show Account Names/Titles** checkbox to disable name/title display.
3. Click the **Submit** button to save your changes.

CHANGING YOUR EMAIL ADDRESS

It is critical that you maintain a current email address in your account profile. This information is used by the system in the event that your application password is forgotten.

To change your email address:

1. From the **Administration** menu, select **Preferences**. The Administration screen is displayed.
2. Select the **Other Preferences** tab.
3. In the **Email address** field, enter your new address.
4. Click the **Submit** button to save your changes.

A confirmation message is displayed when your change has been saved.

SETTING ACCOUNT NAMES (SYSTEM MANAGERS)

System managers can set names for accounts. Where the functionality is available in the system, these account names will be displayed in parentheses next to the account numbers (in drop-down lists, for example). Additionally, where available, the account name is displayed when you move the cursor over its account number, or in columns beside its account number.

To set or change an account name:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. On the Administration screen, select the **Account Names** tab.
3. In an account number's **Name** field, enter the account name to be assigned.
4. Click the **Submit** button to save your selection. A confirmation message is displayed.


SETTING PASSWORD RETENTION PERIOD (SYSTEM MANAGERS)

System managers assigned the appropriate permissions can set the expiration period for all users at their company site.

To set the password expiration period:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. On the **Administration** screen, select the **Security** tab.
3. In the **Password Expiration Days** field, enter a number of days.
4. Click the **Submit** button. A confirmation message is displayed, and the setting is updated.

[Optional] Click the **Default** button to set the expiration period to the system default.

 **Note:** If you click the **Default** button, you must click the **Submit** button to save the change.

MAINTAINING USER PROFILES (SYSTEM MANAGERS)


User profiles specify the modules and features that individual users can access. System managers can add user profiles so that additional users can access the system. System managers can also modify and delete existing user profiles.

When a user profile is set up on the system, a pair of PIC (Personal Identification Code) letters is emailed to your company's main email contact. These letters include first-time log-on information, including the system URL, a temporary User Name, and a password for that temporary User Name. The recipient of the mail can forward it to the user so that they can access the system.

If a user forgets a permanent User Name, the system manager can also generate a new PIC letter for that user.


ADD A USER PROFILE

You can create entirely new user profiles, or you can base a new user profile upon an existing profile that does not have system manager privileges assigned to it.

 **Important:** Once you have created a user profile, you must assign account access to the user in order for the user to access the system!



To create a user profile:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. Select the **User Setup** tab.
3. Click the **Create** button, located beneath the Users pane. The Create New User pane is displayed.
4. In the **User ID** field, accept the generated ID or enter a unique four-character ID for the user. This ID identifies the user to the server.
5. In the **User Name** fields, enter the user's first name, middle initial, and last name.

 **Note:** User names are displayed on the Users pane after the user generates a permanent log-on ID during first-time log-on.


6. Select the checkboxes corresponding to the services the user will be permitted to access (the "user validations"). See the "Validations List" section of this document for information on the validations that may be available for selection.
7. Click the **Add User** button. The user is added to the system, and the Users pane is displayed.

To base a user profile on an existing profile:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. Select the **User Setup** tab.
3. Click the **View** hyperlink associated with the user profile upon which the new profile is to be based. The View User pane is displayed.
4. In the **User ID** field, enter a unique four-character ID for the user. This ID identifies the user to the server.
5. In the **User Name** fields, enter the user's first name, middle initial, and last name.
 **Note:** User names are displayed on the Users pane after the user generates a permanent log-on ID during first-time log-on.
6. Click the **Add User** button. The user is added to the system, and the Users pane is displayed.
 **Note:** The **Add User** button is displayed only in association with user profiles that do not have system manager privileges.
7. Modify the new user profile to customize the services the user will be permitted to access.

MODIFY A USER PROFILE


To modify a user profile:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. Select the **User Setup** tab.
3. In the **Action** column, click the **modify** hyperlink associated with the user profile to be modified. The Modify User pane is displayed.
 **Note:** You may **not** modify your own user profile, or the user profile of any other system manager. If a user is a system manager, a **Y** is displayed in the **Sys Mgr** column of the Users pane in that user's row, and no **modify** hyperlink is available for the user.
4. Make the necessary changes in the **User Name** fields and select or deselect checkboxes to assign or remove validations to/from the user profile. See the "Validations List" section of this document for information on the validations that may be available for selection.
5. Click the **Update** button. A confirmation message is displayed.
6. Click the **Return to List** button to return to the Users pane.

REGENERATE PIC LETTERS FOR FORGOTTEN USER NAMES

If a user name has been forgotten, you can generate a new PIC letter to allow the user to access the system using the first-time log-on procedures. The user will need to create a new permanent User Name.

For security purposes, system managers may **not** regenerate PIC letters for other system managers.

 **Note:** This feature is **not** intended to address forgotten passwords or “locked” status due to multiple unsuccessful log-on attempts or a user who has closed the browser window without logging off. For help with these issues, please contact Technical Customer Service.

To regenerate a user’s PIC letters:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. Select the **User Setup** tab.
3. In the **Action** column, click a **modify** hyperlink associated with the user whose PIC letters are to be regenerated. The Modify User pane is displayed.
4. Click the **Regenerate PIC** button. The PIC-letter regeneration is confirmed, and the Users pane is displayed.

DELETE A USER PROFILE


To delete a user profile:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. Select the **User Setup** tab.
3. In the **Action** column, click the **delete** hyperlink associated with the user profile to be modified. A confirmation dialog box is displayed.
4. Click the **OK** button. The list of user profiles is refreshed, and a confirmation message is displayed.

[Optional] Click the **Cancel** button to discard the deletion request.

VALIDATIONS LIST





When adding or modifying a user profile, refer to the following list of user validations when selecting validations to assign services to the user.






 **Note:** Some of the features described below may not be available to your company or may be available to your company with different names, based on settings instituted by the financial institution and your agreement with the financial institution.

Select this User validation...	To enable the user to...
BANK ACCT RPT	Access balance and transaction reporting. Reporting is prior day, with optional features of current day, controlled disbursement, and multi-bank reporting depending upon the features available to your company.
RESTRICTED ACCT ACCESS	Access accounts validated as “restricted.”
STOP COMPOSE	Access the Stop Payment module and the ability to create, modify, submit, and report on stop payments.
CONTROLLED DISBURSEMENT	Access controlled disbursement reporting. This option should only be chosen if the bank requires and downloads a daily account file for controlled disbursement accounts. If the bank does not download a daily account file, the function is included as a part of the Bank Account Reporting module.
WIRE TRAN COMPOSE	Create, modify, and report on wire transactions. Only users who are validated for WIRE TRAN COMPOSE and WIRE TEMPLATE CREATE can create transactions without using templates, or create a template and transaction together. Users who are creating wire transactions based on templates need not be validated for WIRE TRAN COMPOSE.
WIRE TRAN APPROVE	Approve wire templates and transactions created by another user.
WIRE TRAN DELETE	Delete wire templates and transactions.

WIRE TRAN SUBMIT	Submit wire templates and transactions.
WIRE TEMPLATE CREATE	Create and modify wire templates.
IFT A/M/D	Create, modify, delete, and report on internal funds transfers.
IFT SUBMIT	Submit internal funds transfers.
CC&D COMPOSE	Create Cash Concentration & Disbursement (CC&D) transactions.
CC&D REPORT ACCESS	View CC&D reports.
CC&D CREATE LOCATION ID	Create CC&D Location IDs.
ACH PAYROLL	Create, modify, and delete ACH payroll templates and transactions. This validation is used in conjunction with the ACH COMPOSE TRAN and ACH CREATE TEMPLATE validations.
ACH CORPORATE	Create, modify, and delete ACH corporate templates and transactions. This validation is used in conjunction with the ACH COMPOSE TRAN and ACH CREATE TEMPLATE validations.
ACH CONSUMER	Create, modify, and delete ACH consumer templates and transactions. This validation is used in conjunction with the ACH COMPOSE TRAN and ACH CREATE TEMPLATE validations.
ACH COMPOSE TRAN	Create ACH transactions.
ACH APPROVE	Approve ACH transactions created by another user.
ACH SUBMIT	Submit ACH transactions for processing.
ACH REPORT ACCESS	View the ACH Activity report.
ACH CREATE TEMPLATE	Create ACH templates.

ACH IMPORT	Import ACH transaction and template files.
ACH PASS-THRU	Upload ACH-ready files to the server for the financial institution to retrieve. User must have one or more of ACH PAYROLL, ACH CORPORATE, and/or ACH CONSUMER validations.
ACH PASS-THRU REPORT	View the ACH Activity report for NACHA Pass-thru batches.
SPECIAL REPORTS	Access “special” text-formatted reports provided by the financial institution (e.g., Lock Box reports and account analysis statements).
BILL PAY	Use the Web bill payment module. Users with this validation can: <ul style="list-style-type: none"> • Schedule payments (but scheduled payment must be approved). • Add and edit payment accounts. • Request e-bills. • Add and delete payees. • View payments. • Submit inquiries regarding bill payments to Customer Service via email.
BILL PAY APPR	Use the Bill Pay online bill payment module in its full capacity. This includes all rights associated with the Bill Pay validation, as well as the ability to approve payments. Note: At least one user must be validated for BILL PAY APPR if any user is validated for the Bill Pay service. Single-user Bill Pay customers must be validated for both BILL PAY and BILL PAY APPR.
LOAN PAY	Make internal loan payments through the loan payment module. Note: If this feature is selected, the INTERNAL TRANSFERS A/M/D feature must also be selected.
LOAN RPT	View loan balance reports. Note: If this feature is selected, the BANK ACCT RPT feature must also be selected.

POS PAY	Use the Positive Pay fraud prevention module, including the ability to create check items, set up check item import templates, and import check items.
POS PAY APPROVE	Approve check release authorizations made by the user or by another individual.  Note: At least one user must have POS PAY APPR validation if any user is validated for the Positive Pay service.
POS PAY DECISION	Authorize or withhold payment for a presented check.
POS PAY VIEW	View Positive Pay reports.
CHECK INQUIRY	Access check inquiry functionality. Users can create, modify, submit, and report on requests tracking the status of checks they have issued.
CHECK PHOTOCOPY	Access check copy request functionality. Users can create, modify, submit, and report on requests for copies of paid checks.
STOP CANCEL	Cancel requested stop payments.
REMOTE DEPOSIT	Access the basic remote deposit functionality (the Pending Items and Reports tabs).  Note: Users must be validated for RD SCAN in order to scan checks.
RD SCAN	Scan checks for remote deposit. Users with RD SCAN permissions can modify the check type (when available).  Note: If this feature is selected, the REMOTE DEPOSIT feature must also be selected.
RD APPROVE	Approve remote deposit check batches that were scanned by users who require approval of their check items. Approval requirements are set by the System Manager.  Notes: <ul style="list-style-type: none"> • If this feature is selected, the REMOTE DEPOSIT feature must also be selected. • If approving users have some or all of the modify permissions (RD SCAN, MICR MOD, or AMT MOD), they can modify the associated portions of check items they are approving.

RD SUBMIT	<p>Submit remote deposit checks for batching into an X9.37 file.</p> <p> Notes:</p> <ul style="list-style-type: none"> • If this feature is selected, the REMOTE DEPOSIT feature must also be selected. • If submitting users have some or all of the modify permissions (SCAN, MICR MOD, or AMT MOD), they can modify the associated portions of check items they are submitting.
RD MICR MOD	<p>Users with Remote Deposit scanning, approval, or submission permissions can modify the information found on the MICR line of the check.</p> <p>After selecting this checkbox, select Full from the associated drop-down list to grant the user permission to modify all information scanned from the MICR line of the check, or select Partial to grant the user permission to modify only the MICR-line information that caused an error.</p> <p> Note: If this feature is selected, the REMOTE DEPOSIT feature must also be selected.</p>
RD AMT MOD	<p>Users with Remote Deposit scanning, approval, or submission permissions can modify check amount information.</p> <p> Note: If this feature is selected, the REMOTE DEPOSIT feature must also be selected.</p>
ACH Transaction Type	<p>Select the checkboxes associated with the transaction types to which the ACH user is to be granted access.</p> <p> Note: User must have one or more of ACH PAYROLL, ACH CORPORATE, and/or ACH CONSUMER validations.</p>
ACH Tax Templates	<p>Select the checkboxes associated with the tax templates to which the ACH user is to be granted access.</p> <p> Note: User must have one or more of ACH PAYROLL, ACH CORPORATE, and/or ACH CONSUMER validations.</p>


The following functions are reserved for future implementation:

- DTS WIRELESS
- IFT APPROVE

SETTING ACCOUNT PERMISSIONS

System Managers can grant users access permissions to specific accounts. These permissions can be given to a user separately for each module in the system, or can be given to a user for all modules.

System Managers may modify their own account access permissions only if they have been given specific permissions to do so by the financial institution; contact the financial institution for additional information.

 **Important:** Users must be assigned account permissions before they can use the system!

To assign user permissions for accounts:

1. From the **Administration** menu, select **Applications**. The Administration screen is displayed.
2. On the Administration screen, select the **Account Permissions** tab.
3. From the **User** drop-down list, select the ID of the user to whom account access is to be assigned.

The **Application** drop-down list is displayed.

4. Select an application (module) for which permissions are to be assigned. Do one of the following:
 - Select a specific application
From the **Application** drop-down list, select the application name.
 - Select all applications
From the **Application** drop-down list, select **All Applications**.

Accounts available for the application(s) you selected are displayed. The application names are in the left-hand column, and the account numbers, each with their own checkbox, are in the right-hand column.

5. Select the checkbox associated with each account for which permissions are to be granted.
[Optional] Click the **Check All** button to select all checkboxes, or click the **Clear All** button to deselect all checkboxes.
6. Click the **Submit** button. A confirmation message is displayed when your selections have been processed.

VIEWING INFORMATION ABOUT USERS AND ACCOUNTS

While all users can view their user privileges and available accounts, System Managers have the additional option of viewing information associated with the user profiles created by System Managers or the financial institution.

VIEWING A LIST OF USERS

To access a list of user profiles:

1. Click your User Name, located in the bottom right-hand corner of the system's browser window. A pop-up window is displayed.
2. Select the **User Map** tab. A list of user profile is displayed. The following information is provided about each profile:

This column...	Displays...
User ID	User ID associated with the user profile.
User Name	Name the user chose for purposes of logging on to the system. If the user has not yet performed the first-time log-on procedure, this column is blank.
Name	User's actual name, as provided when the user performs the first-time log-on procedure. If the user has not yet performed the first-time log-on procedure, this column is blank.

3. Close the pop-up window to continue working.

VIEWING SERVICES AVAILABLE TO USERS

To view a list of the services available to each user:

1. Click your User Name, located in the bottom right-hand corner of the system's browser window. A pop-up window is displayed.
2. Select the **User Privileges** tab.
3. From the **User** drop-down list, select the user ID associated with the profile to be displayed. The user's log-on name is displayed in parentheses next to the user ID, if the user has performed the first-time log-on procedure.

Available services are displayed in the Available Services area.


4. Close the pop-up window to continue working.

ACCESSING THE SESSION LOG (ALL USERS)

The session log displays records of all activity performed on the system by individuals logged on with your User ID during the 63 days prior to (and including) the current day's date.

To access the session log:

1. From the **Reporting** menu, select **All Reports**. The All Reports screen is displayed.
2. In the Other Reports pane, click the **Session Log** hyperlink. The Session Log parameter pane is displayed.
3. From the **Category** drop-down list, select a specific category, or accept the default selection of **All**.
4. In the **From** field, enter the first date to be included in the report.

 **Note:** The Session Log is available for 63 days prior to the current day's date (including the current day). If a From Date earlier than 63 days is selected, an error message will be displayed.

5. In the **To** field, enter the last date to be included.
6. Click the **Submit** button. The Session Log pane is displayed.

If there are more than 12 records in the report, click the numbered **View [numbers]** hyperlinks at the bottom of the pane to view the rest of the information in sets of 12 records, or click the **View All** hyperlink to view all records.