FIRST MERCHANTS COMMERCIAL BANKING

Managing Users

Online Banking User Guide

Businesses can take advantage of the administration tools which allow you to manage your users and the entitlements they have for accounts and transactions. This can be found under the User Management section under Admin Tools. User Management entitlements will provide visibility and access to payments throughout the Online Banking solution. User entitlements can be used to facilitate a separation of duties.

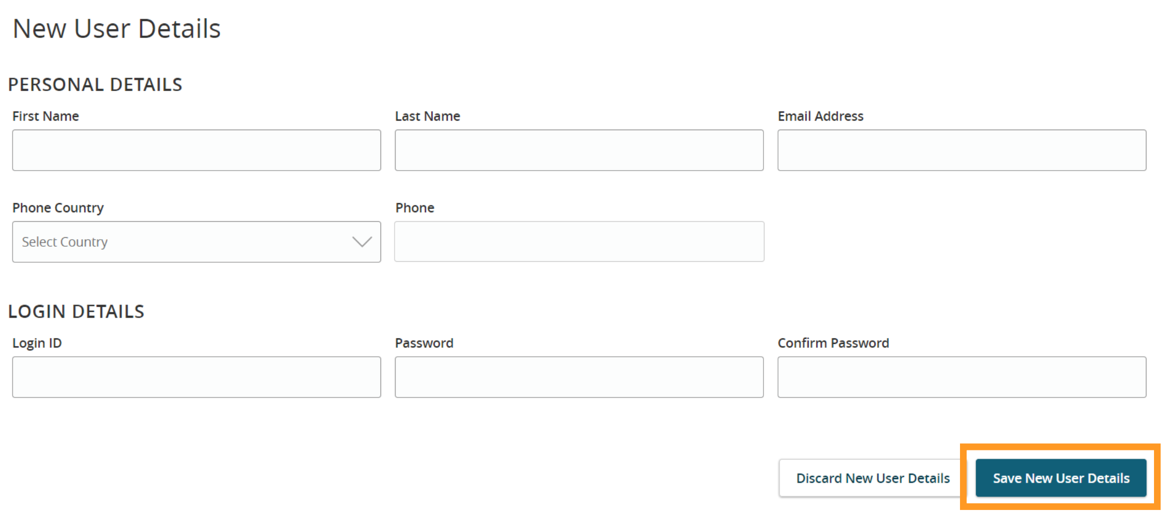
Adding a user and configuring rights

A user who has the Manage Users feature assigned can create other users on the User Management page. Please make sure you follow all the steps to ensure the new user has appropriate rights and entitlements.

To add a user:

1. In the navigation menu, select Admin Tools > Users.
2. Select Add User. The New User Details page appears.

3. Add the following details:



   a. In the First Name and Last Name fields, enter names.

   b. In the E-Mail Address field, enter a valid email address.

c. In the Phone Country drop-down list, select the country.

d. In the Phone field, enter a valid phone number.

e. In the Login ID field, enter a login name.

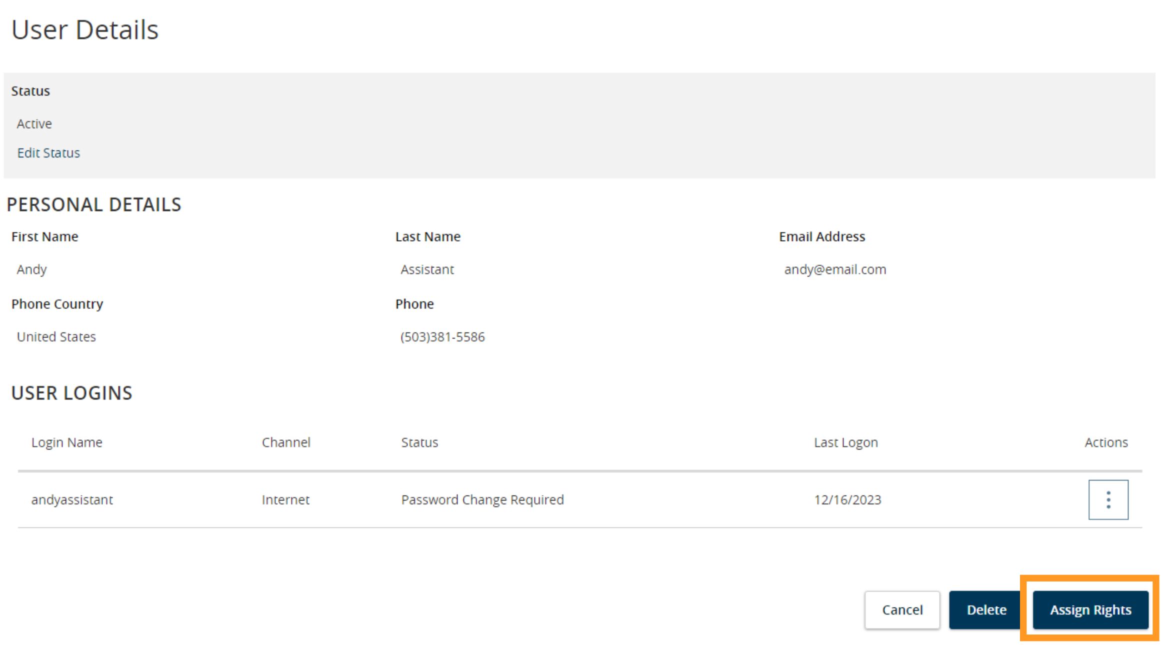
f. In the Password field, enter a default password, and re-enter it in the Confirm Password field.

g. Select Save New User Details.

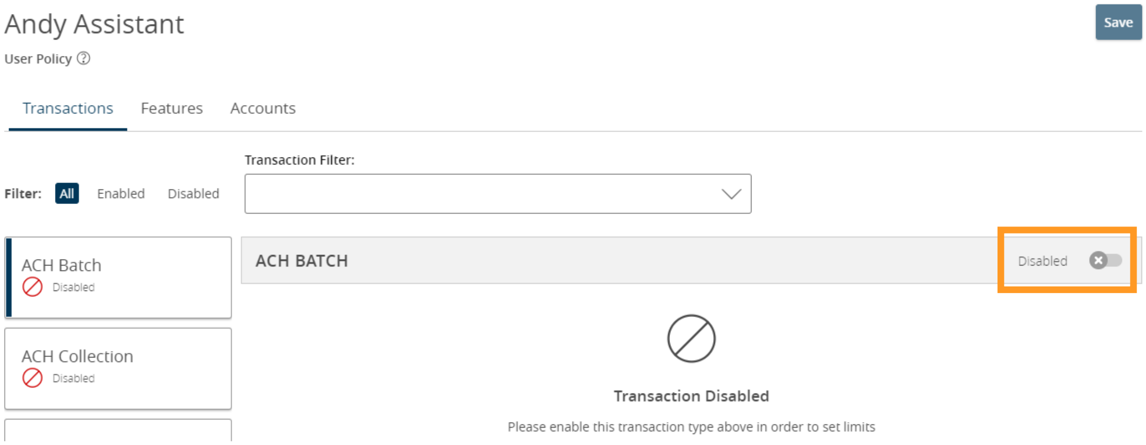
4. Select Close.

To assign rights:

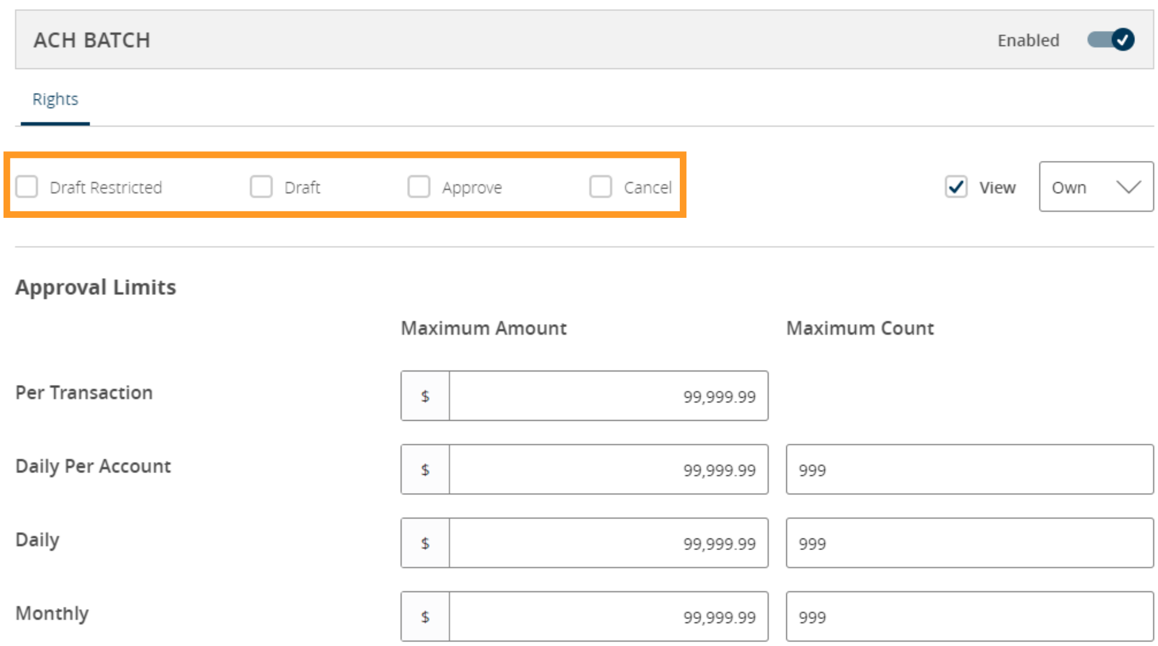
1. In the navigation menu, select Admin Tools > User Management.
2. Locate the User to which you want to assign rights. Select the edit icon (✎).



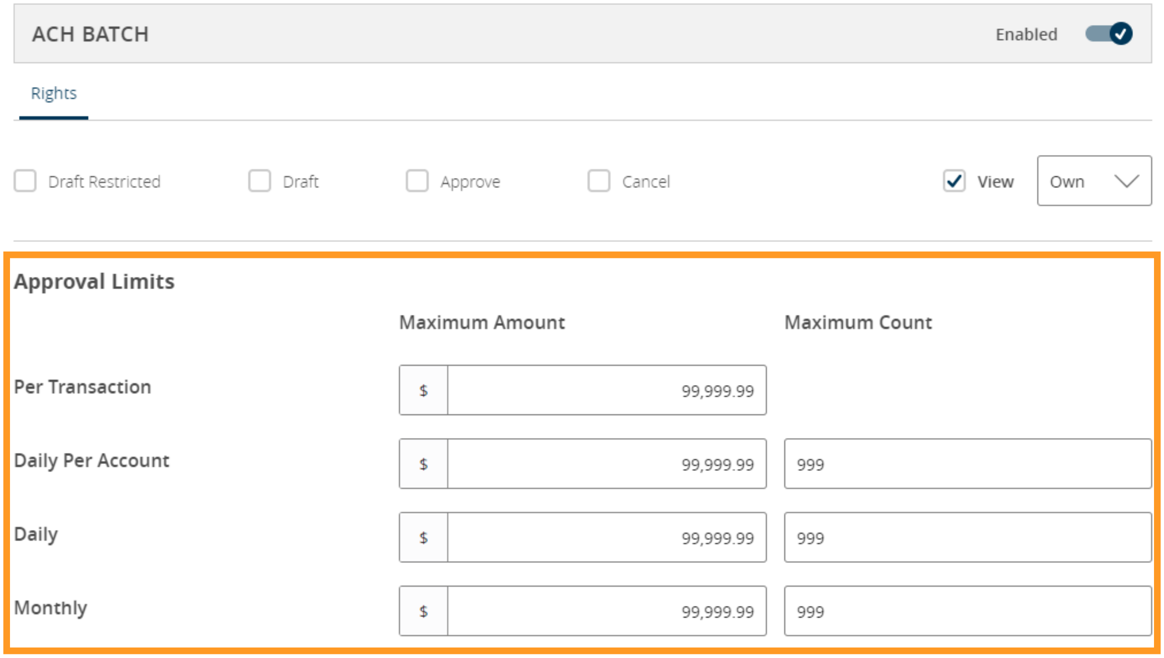
3. Click Assign Rights.



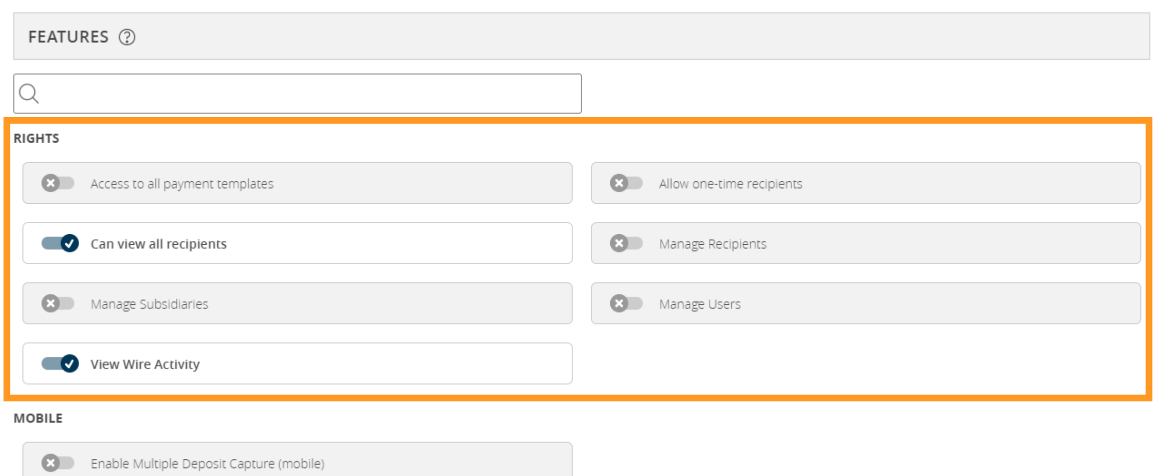
4. Select a Transaction Type. Enable the transaction if it is disabled.



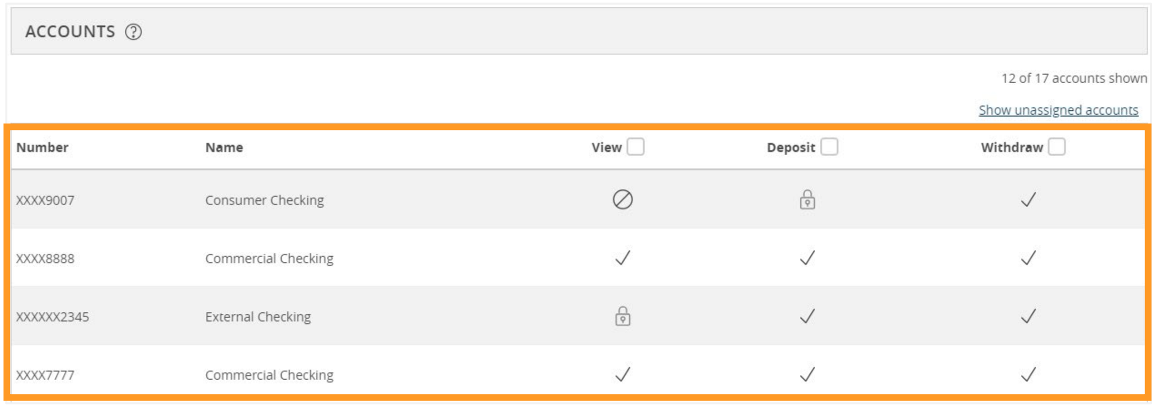
5. Select Draft, Approve, Cancel, and View Online Activity to assign rights to the user.



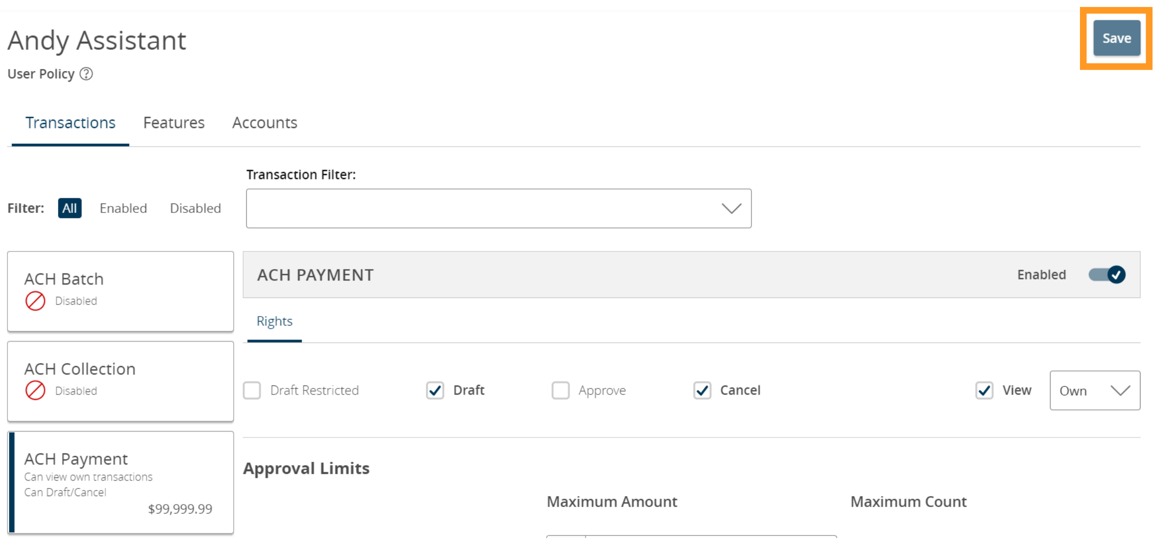
6. In the Approval Limits section, select a type of limit, then enter the limit if you want to set a lower limit for the user. You can change both the Maximum Amounts and Maximum Count.
7. Repeat these steps for additional Transaction Types for the user.



8. Select the Features tab to give the user access to additional capabilities. Toggle each feature slide on or off for the User. Disabled features will display in gray. Enabled features will display in blue with a check mark.



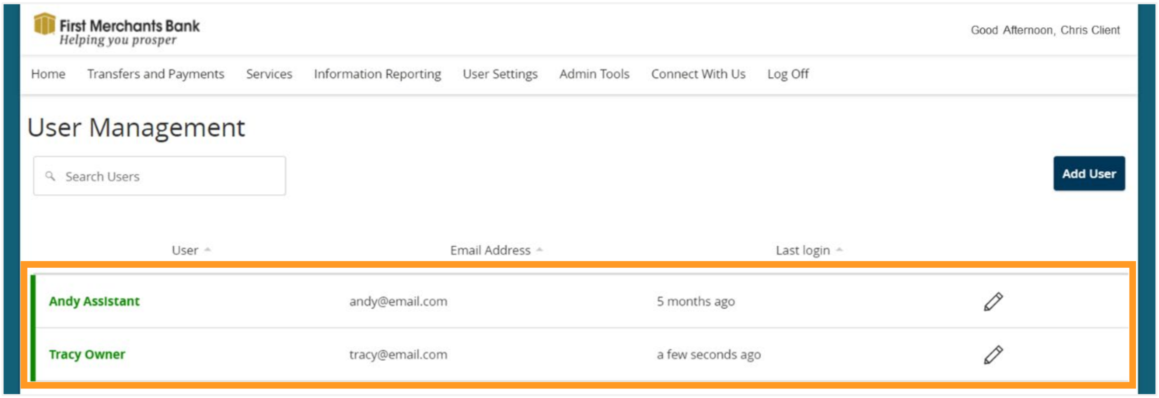
9. Select the Accounts you want to associate with the user.



10. When you have finished, click Save.

Viewing existing users

The User Management page provides a list view of all users.



To view existing users:

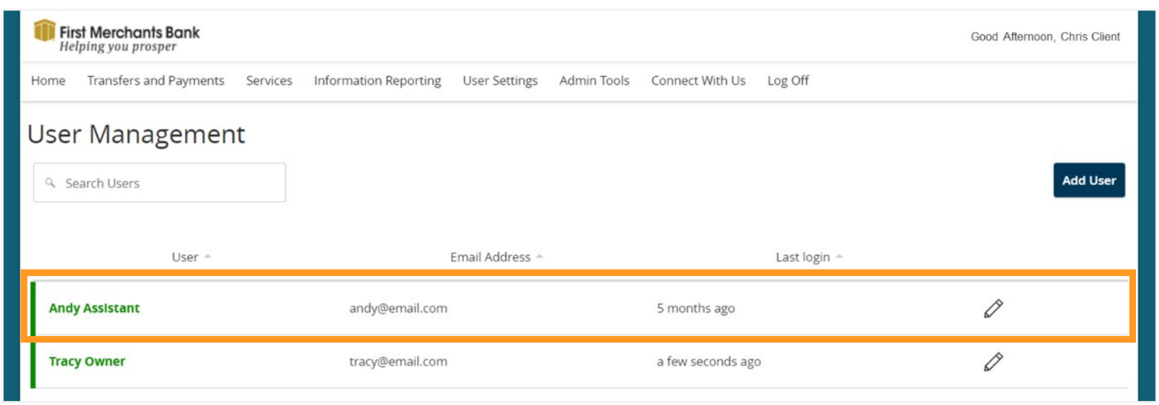
1. Select Admin Tools > Users. The User Management page appears with a list of users.
2. To search users, type the name of the user in the search field (Optional).

Editing user entitlements

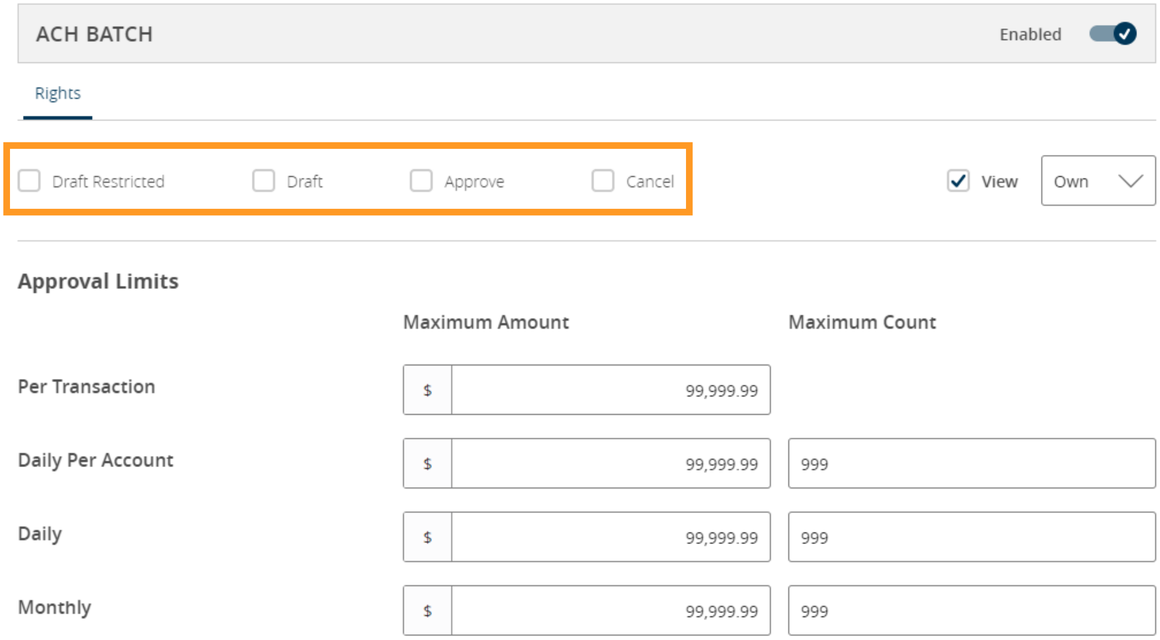
To manage a user, including editing entitlements and privileges also known as rights, you must have the Manage Users feature assigned. Modification to a user's entitlements and rights are visible the next time the user logs in.

To edit user rights:

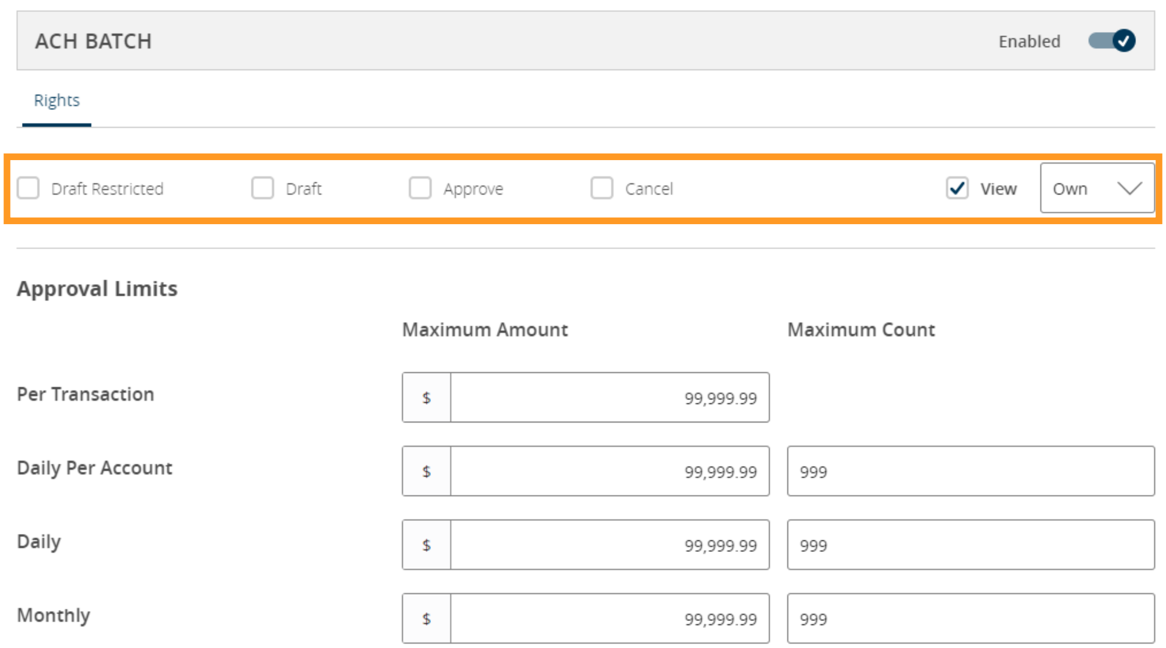
1. Select Admin Tools > Users.



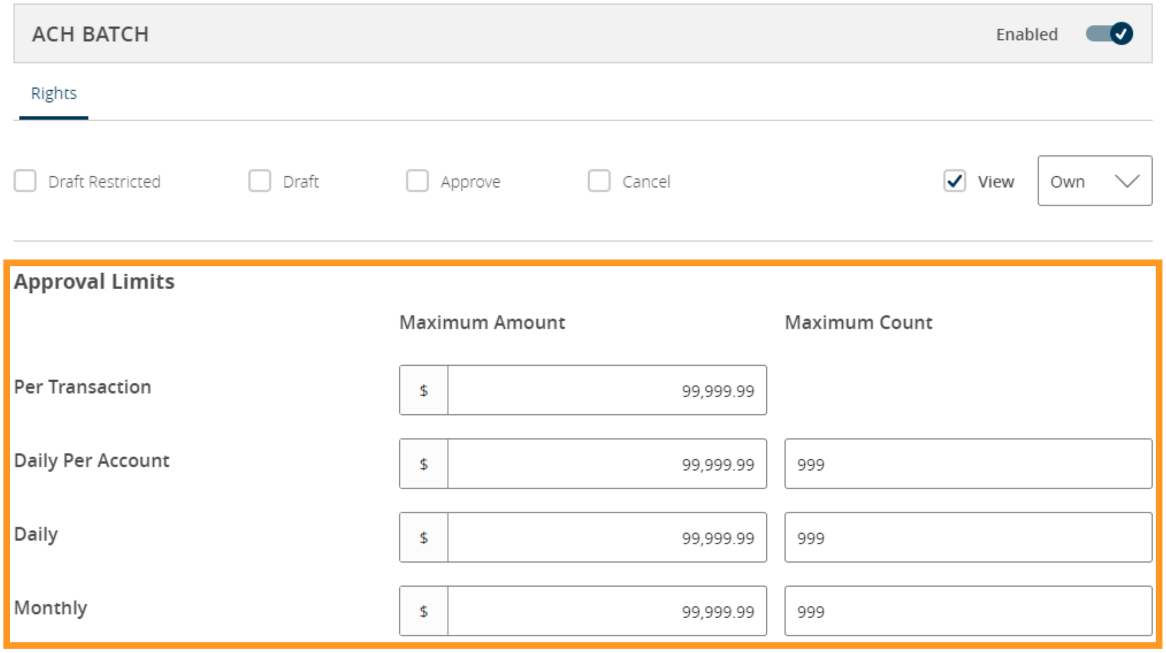
2. Locate the user you want to modify. Select edit (✎).



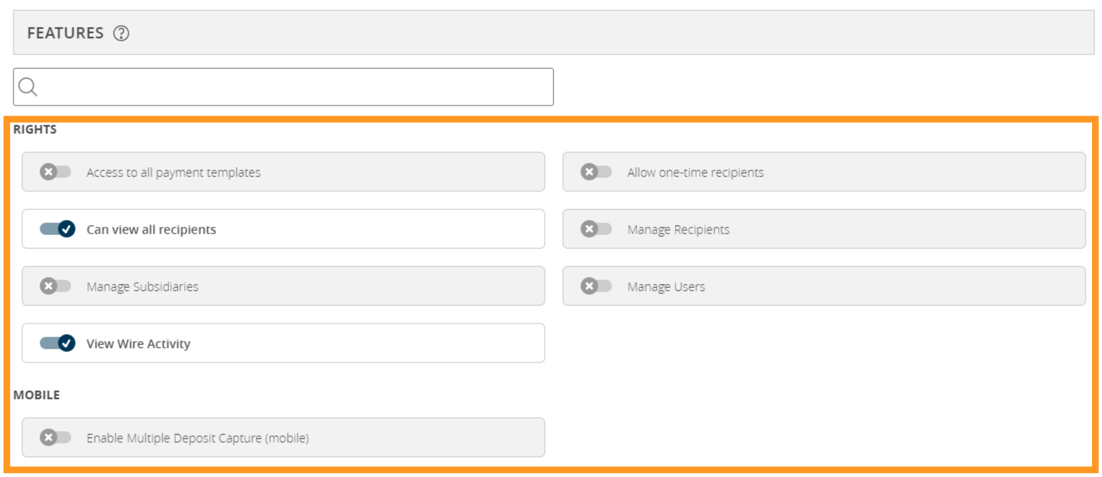
3. Select the Rights tab to add, remove, or change the transactions.



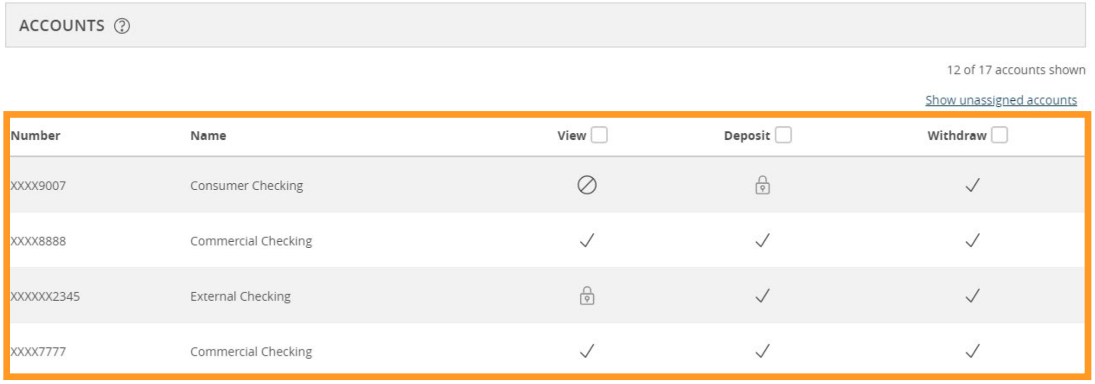
4. Select Draft, Approve, Cancel, and View Online Activity to edit rights for the user.



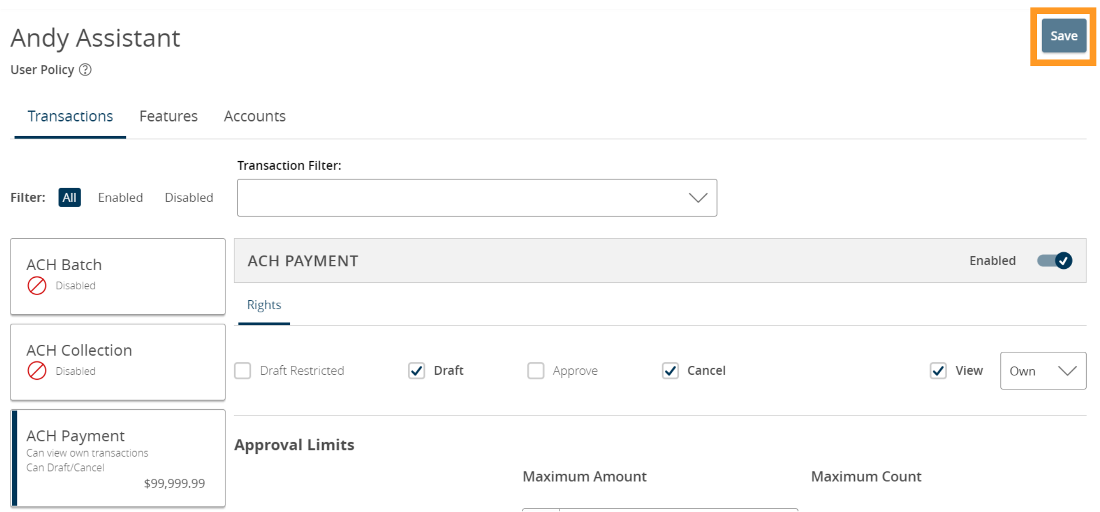
5. In the Approval Limits section, select a type of limit, then enter the limit if you want to set a lower limit for the user. You can change both the Maximum Amounts and Maximum Count.



6. Select Features to give the user access to additional capabilities. Toggle each feature slide on or off for the User. Disabled features will display in gray. Enabled features will display in blue with a check mark.



7. Select the Accounts you want to associate with the user.

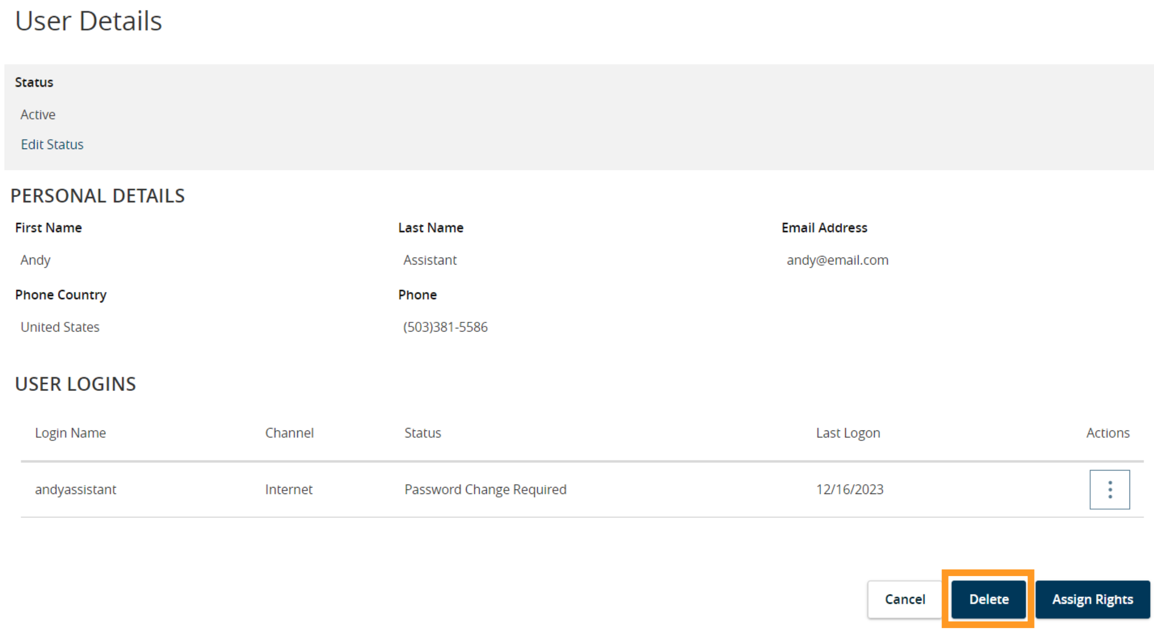


8. Click Save, then click Close.

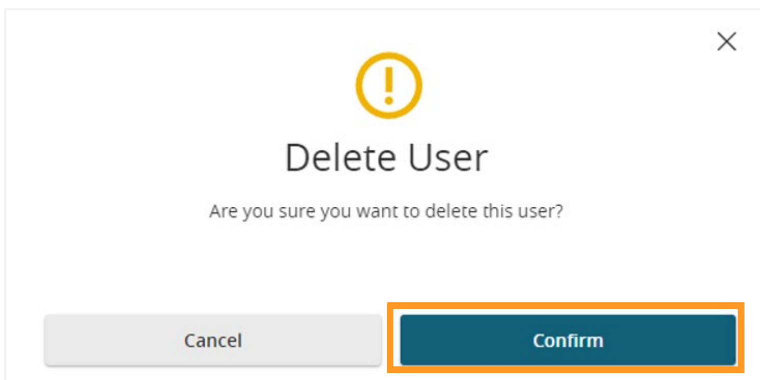
Deleting users

Deleting users does not impact transactions that were drafted, approved or set to be recurring by the deleted user. To delete a user:

1. Select Admin Tools > Users.
2. Locate the user you want to delete. Select edit.

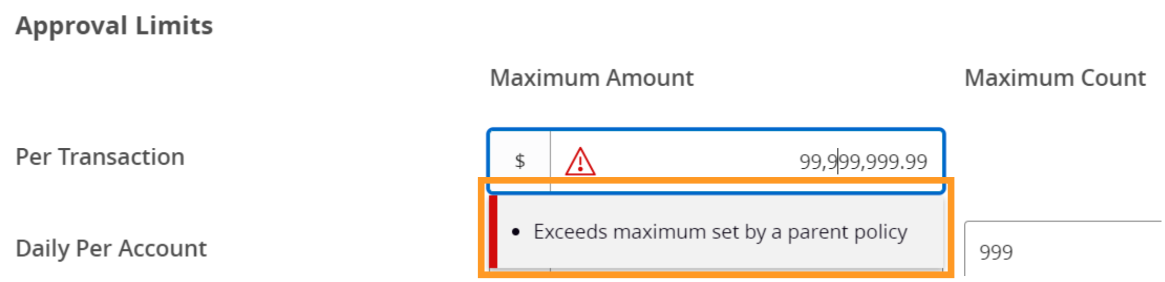


3. Click Delete. ()



4. Select Confirm to verify.

Appendix: Messages you may receive



When adding or editing users, you may see a message similar to this. This means you have attempted to set a limit that is higher than that assigned to your company. You can set limits for each user at or below this limit, but not above. If you have any questions, please contact us for more information.