

# Online User Management

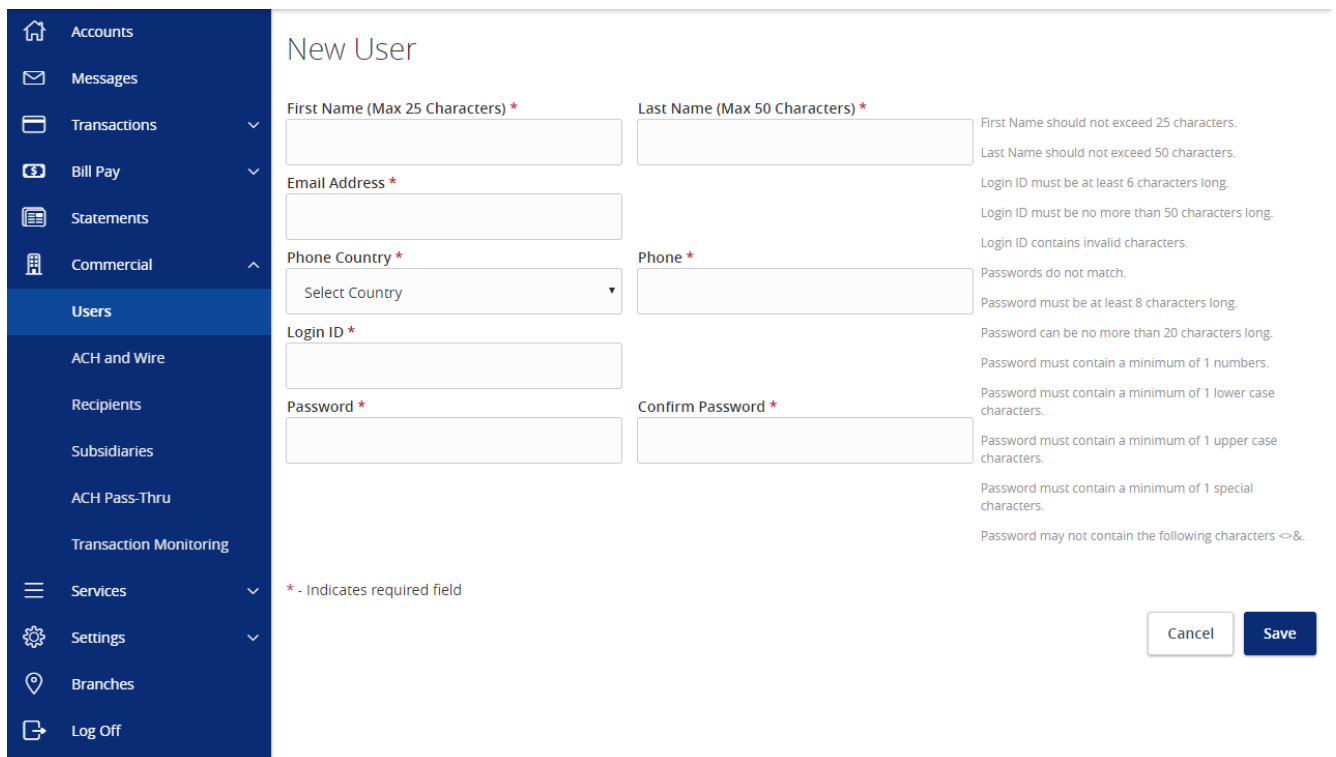
## Creating Online Users

1. Select the 'Users' option under the 'Commercial' menu.
2. Click the 'Add User' button on the right side of the screen



The screenshot shows the 'User Management' page. On the left is a dark blue navigation menu with options: Accounts, Messages, Transactions, Bill Pay, Statements, Commercial, Users (highlighted), ACH and Wire, Recipients, Subsidiaries, ACH Pass-Thru, Transaction Monitoring, Services, Settings, Branches, and Log Off. The main content area has a title 'User Management', a search box labeled 'Search Users', and a 'Sort by' dropdown. On the right side, there are two icons (list and grid) and a red-bordered button labeled 'Add User'.

3. Enter the required fields for the new user.



The screenshot shows the 'New User' form. The left navigation menu is the same as in the previous screenshot, with 'Users' highlighted. The form has the following fields and validation rules:

- First Name (Max 25 Characters) \***: Text input field. Validation: First Name should not exceed 25 characters.
- Last Name (Max 50 Characters) \***: Text input field. Validation: Last Name should not exceed 50 characters.
- Email Address \***: Text input field. Validation: Login ID must be at least 6 characters long. Login ID must be no more than 50 characters long. Login ID contains invalid characters.
- Phone Country \***: Dropdown menu with 'Select Country' selected. Validation: Passwords do not match.
- Phone \***: Text input field. Validation: Password must be at least 8 characters long. Password can be no more than 20 characters long. Password must contain a minimum of 1 numbers.
- Login ID \***: Text input field. Validation: Password must contain a minimum of 1 lower case characters.
- Password \***: Text input field. Validation: Password must contain a minimum of 1 upper case characters.
- Confirm Password \***: Text input field. Validation: Password must contain a minimum of 1 special characters. Password may not contain the following characters <>.&.

\* - Indicates required field

Buttons: Cancel, Save

4. Click on each transaction type to configure the user's entitlements and limits.

The screenshot shows the 'TEST USER' configuration page with the 'Users' menu selected. The 'Overview' tab is active, displaying a table of transaction types and their associated limits and actions.

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
ACH Collection	\$500,000	999,999,999 / \$500,000	999,999,999 / \$500,000	999,999,999 / \$500,000	✓	✓	✓	👤
ACH Passthru	\$500,000	999,999,999 / \$500,000	999,999,999 / \$500,000		✓	✓	✓	👤
ACH Payment - Single	\$11	999,999,999 / \$11	999,999,999 / \$253	999,999,999 / \$11	✓	✓	✓	👤
ACH Payments	\$100,000	999,999,999 / \$100,000	999,999,999 / \$500,000	999,999,999 / \$100,000	✓	✓	✓	👤

5. Click on any transaction type to edit the user's limits and rights. Please note that if you disable the transaction type completely, the user's rights to view those types of transactions in the Activity Center do not change. You must manually change their view rights, if applicable.

The screenshot shows the 'TEST USER' configuration page with the 'Users' menu selected. The 'ACH COLLECTION' transaction type is selected, and the 'Rights' tab is active. The configuration shows that the transaction type is 'Enabled' and lists the user's rights for this type.

ACH COLLECTION Change Enabled

Right	Status	Description
Draft	✓	Can draft.
Approve	✓	Can approve.
Cancel	✓	Can cancel.
View Online Activity	👤	Can view all transactions.

6. Enter the user's transaction dollar and count limits.

ACH COLLECTION [Change](#)
Disa

Rights
Approval Limits

**MAXIMUM AMOUNT**

Per transaction  
**\$500,000** ✎

Per Account Per Day  
**\$500,000** ✎

Per Day  
**\$500,000** ✎

Per Month  
**\$500,000** ✎

**MAXIMUM COUNT**

Per Account Per Day  
**999,999,999** ✎

Per Day  
**999,999,999** ✎

Per Month  
**999,999,999** ✎

Maximum transaction amount

\$
500,000
✕

1	2	3
4	5	6
7	8	9
Delete	0	Clear

7. Select the appropriate non-transactional features.

8. Designate the user's account rights. Selecting the checkbox next to each will enable or disable the right for all accounts.

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
CD-xxx6715	Certificate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DDA-xxx3580	Commercial Checking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAV-xxx3954	Business Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAV-xxx3946	Money Market Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-xxx3572	COMMERCIAL CHECKING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NOTE:** If you assign rights to a user to deposit into one of your business account(s) and the user makes a check deposit using the mobile banking app, please be aware that the user will receive all future deposit e-mail notifications for all of your business accounts. This includes any check deposit(s) made into any of your business accounts by any user, regardless of the user's rights to view or deposit into that account. Users who have made a deposit will continue to receive deposit e-mail notifications until you notify Rockland Trust to delete them.

9. Select the link to show or hide unassigned accounts.

ACCOUNTS

Hide unassigned accounts

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
CD-xxx6715	Certificate	✓	🔒	🔒
DDA-xxx3580	Commercial Checking	✓	✓	✓
SAV-xxx3954	Business Savings	✓	✓	✓
SAV-xxx3946	Money Market Savings	✓	✓	✓
DDA-xxx3572	COMMERCIAL CHECKING	⊘	⊘	⊘

10. Click the 'Save' button in the top right corner of the screen.

## Leigh-anne Lydon

User Policy

Save
ⓘ

Overview
Features
Accounts

ACCOUNTS

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
CD-xxx6715	Certificate	✓	🔒	🔒
DDA-xxx3580	Commercial Checking	✓	✓	✓
SAV-xxx3954	Business Savings	✓	✓	✓
SAV-xxx3946	Money Market Savings	✓	✓	✓
DDA-xxx3572	COMMERCIAL CHECKING	✓	⊘	⊘

11. Go back to the 'Users Menu' and click on the pencil icon to modify their rights and view user details, including their Login Name, Channel, Status, and Last Logon date.

### View User

FIRST NAME (MAX 25 CHARACTERS) \*      LAST NAME (MAX 50 CHARACTERS) \*

A      Test

E-MAIL ADDRESS \*  
test@test.com

PHONE COUNTRY \*      PHONE \*

United States      (555)555-5555

Login Name	Channel	Status	Last Logon
Tester	Internet	Password Change Required	

\* - Indicates required field

Cancel    Delete    **Assign Rights**