

# Administration Console

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For questions and additional information about Internet Business Banking



Call Customer Service at 800-238-4486

7:00 a.m. – 9:00 p.m. Monday through Friday, 8:00 a.m. – 5:00 p.m. Saturday, Pacific Time

# Introduction

The Administration Console allows you to perform tasks such as setup user IDs and passwords, manage enrollment in online services like Internet Business Banking, and setup account permissions. It provides control and security and enables you to give online account access to employees and service providers such as your accountant, book keeper or financial advisor.

## User types in the Administration Console:

- **Contracting Officer or Owner** - Key decision maker who is empowered to manage the company's access to banking services and to designate other people's access to web banking services
- **Web Administrator** - Designated by the Contracting Officer or Owner, this person has access to online services and can create and manage Web Users
- **Web User** - Designated by the Web Administrator and when enrolled in Internet Business Banking, has access to account information and can perform some transactions, but does not have access to the Administration Console

	Contracting Officer or Owner	Web Administrator	Web User
Access the Administration Console	✓	✓	No Access
Add or Delete users and Edit user profiles	Can perform these functions on All users	Can perform these functions on Web Users, including View Only in Internet Business Banking	
Enroll or Remove a user's access to an online service			
Lock or Unlock user access			
Reset or issue Temporary Password			
Reset Challenge Questions			

## User types in Internet Business Banking:

- **Contracting Officer or Owner Web Administrator** - Can perform all user access management functions and transactions
- **Web Administrator** - Designated by the Contracting Officer or Owner, and can perform access management functions on Web Users and View Only users, and can perform most transactions
- **Web User** - Can pay bills and transfer funds among Union Bank accounts and view account information
- **View Only User** - Can only view balances and transaction details, but cannot perform any transactions

	Contracting Officer or Owner - Web Admin	Web Admin	Web User	View Only
<b>Access</b>				
Add owned Union Bank accounts	✓			
Manage Account Permissions	✓	✓		
Change user type	All	Web User or View Only		
Enroll users in Alerts	✓	✓		
Enroll users in Online Statements	✓	✓		
Change Mobile access	✓	✓		
<b>Transactions</b>				
Bill Pay	✓	✓	Union Bank loan payments	
Internal Fund Transfer	✓	✓	✓	
Mobile Check Deposit	✓	✓	✓	✓
<b>Viewing</b>				
Statements & Notices	✓	✓	✓	✓
Balances & Transaction detail	✓	✓	✓	✓
Images of Checks & Deposits	✓	✓	✓	✓
Mobile	✓	✓	✓	✓
<b>Services</b>				
Set delivery method for Statements & Notices	✓	✓		
Accept Agreement Term changes	✓	✓		
Request Stop Payment	✓	✓	✓	
Order Check and Statement copies	✓	✓	✓	
Activate ATM/Debit card	✓	✓	✓	

# Manage User Access

It's easy to manage user access in online banking day or night, seven days a week, in a safe, secure\* environment.

## Access the Administration Console.

- 1 Sign into online banking at [unionbank.com](http://unionbank.com)
- 2 Click **Account Services**.
- 3 In the **Manage User Access** section you will see links to manage user settings in the **Administration Console**.

If you have difficulty signing on, please call Customer Service at 800-238-4486.

\* Online security features include 128-bit encryption, User ID and Password, and a security question if we do not recognize the device you are using to sign on.

ACCOUNT NAME	ACCOUNT NUMBER	BALANCE
<a href="#">Checking</a>	xxxx	<a href="#">\$415,369.37</a>
<a href="#">Preferred Savings</a>	xxxx	<a href="#">\$200,339.62</a>
TOTAL		<a href="#">\$615,708.99</a>

**CUSTOMER SERVICE**  
Account Services

**Tip:** To nickname your accounts, go to [Account Services](#).

**Account Settings**

- View Full Account Numbers
- Show or Hide Accounts on Account Summary
- Show or Hide Payees
- Nickname Accounts
- Business Service Charges and Disclosures
- Affiliate Information Sharing Preference

**Manage User Access**

- Change Your Profile
- Create, Edit or Delete Users
- Manage User Passwords and Security Settings
- Manage User Access to Internet Business Banking
- Manage User Access to Online Statements
- Manage User Access to Open Accounts

# Manage User Access

From the Administration Console page, you can add a new user, edit a user profile, edit account access, and enroll or remove services.

## Add a new user.

- 1 Click **Add a New User**
- 2 Enter the required information.
- 3 Designate the user as either a Web User or Web Admin. (Web Admins have the authority to add/delete/edit user profiles and to issue temporary passwords.)
- 4 Click **Submit** to complete the request.

A temporary password will be emailed to the new user.

NOTE: After you have added a new user you must Enroll the user in each service you want that user to access. See page 8 for Enroll information.

The most popular services are Internet Business Banking, Alerts and Online Statements.

We also offer a full range of treasury management services.

[unionbank.com/treasurymanagement](http://unionbank.com/treasurymanagement)

The screenshot shows the 'Administration Console' interface. At the top, there is a search bar containing 'John Doe, ABC COMPANY'. Below this is a note: 'Note: Please turn off pop-up blockers to ensure that you can see all options.' The main section is titled 'Manage Users' and features a '+ Add a New User' button (callout 1). Below this, there is a user profile for 'Ken Allen' with an 'Edit Profile' button. The 'Services' section lists 'INTERNET BUSINESS BANKING', 'ONLINE STATEMENTS', and 'OPEN ACCOUNTS' with 'Edit | Remove', 'Enroll', and 'Enroll' links respectively. The 'Quick Links' section includes 'Manage User Phones', 'Lock User Access', and 'Issue Temporary Password'. The 'Create a New User' section is highlighted and contains a search bar with 'John Doe, ABC COMPANY'. Below the search bar is a note: 'Please complete the information below and click 'Submit' to create a new User. You can copy another user's entitlements and grant them to the new user, or enroll the new user in each service individually. \* Denotes a required field.' The form fields include: '\* User ID' (callout 2) with a 'Check Availability' link; '\* First Name', 'Middle Name', and '\* Last Name'; '\* Work Number' and 'Mobile 1: Use for Alerts'; '\* Email' and '\* Confirm Email'; 'User Type' with radio buttons for 'Web User' (callout 3) and 'Web Admin'; 'Copy another User's entitlements?' with 'Yes' and 'No' radio buttons; and two checked checkboxes: 'Send High Risk Transactions email' and 'Notify user by email about offers, promotions, and new products'. At the bottom right, there are 'Reset' and 'Submit' (callout 4) buttons. A sidebar on the right contains instructions: 'User ID must be a minimum of 7 and no greater than 32 letters and numbers, no special characters (!, @, #, \$, %, &).' and 'When you create a new User, an email message will be sent notifying the User of only the temporary password. For security purposes, the User ID created for the new user should be communicated separately.'

# Manage User Access

## Add a new user and copy another user's profile.

- 1 Click **Add a New User**
- 2 Enter the required information.
- 3 Designate the user as either a Web User or Web Admin. (Web Admins have the authority to add/delete/edit user profiles and to issue temporary passwords.)
- 4 Click the **Yes** button next to “Copy another User’s entitlements?” and click **Submit**.
- 5 Select the user’s profile you want to copy.
- 6 Click **Submit** to complete the request.

NOTE: You will receive a confirmation, with an accompanying number(s), for this request.

Creating a new user by copying another user’s profile may help you streamline changes for staff turnover, promotions, and adding new employees to your user list.

**Manage Users**

Ken Allen [Edit Profile](#)

**Services**

- INTERNET BUSINESS BANKING [Edit](#) | [Remove](#)
- ONLINE STATEMENTS [Enroll](#)

**Quick Links**

- [Manage User Phones](#)
- [Lock User Access](#)

**Create a New User**

John Doe, ABC COMPANY

Please complete the information below and click 'Submit' to create a new User. You can copy another user's entitlements and grant them to the new user, or enroll the new user in each service individually. \* Denotes a required field.

\* User ID:  [Check Availability](#)

\* First Name:

Middle Name:

\* Last Name:

\* Work Number:    ext.:

Mobile 1:

Use for Alerts

\* Email:

\* Confirm Email:

User Type ?

- Web User
- Web Admin

Copy another User's entitlements?  Yes  No

Send High Risk Transactions email

Notify user by email about offers, promotions, and new products

User ID must be a minimum of 7 and no greater than 32 letters and numbers, no special characters (!, @, #, \$, %, &).

When you create a new User, an email message will be sent notifying the User of only the temporary password. For security purposes, the User ID created for the new user should be communicated separately.

[Reset](#) [Submit](#)

**Copy the Services of an Existing User**

John Doe, ABC COMPANY

**The user John Doe is created successfully.**

Copy	Last Name	First Name	INTERNET BUSINESS BANKING	INFORMATION REPORTING	ONLINE STATEMENTS	STOP PAYMENTS
<input checked="" type="radio"/>	Allen	Ken				
<input type="radio"/>	b	i				
<input type="radio"/>	bach	james				
<input type="radio"/>	Baes	Conrad	✓		✓	
<input type="radio"/>	basso	sonia				

[Reset](#) [Submit](#)

# Manage User Access

## Edit user profile.

- 1 Click **Edit Profile** next to the user's name to change name, email address, security info and user type.
- 2 Click **Edit User Info**. Update the user's profile by entering new information where needed.
- 3 Click **Update** to submit the request.
- 4 Click **OK** to confirm the request.
- 5 Click **Manage User Phones** to add or change user's phone numbers.
- 6 Use the **Security Maintenance** section on the **Edit Profile** page to reset or issue a temporary password, manage user's phone numbers, lock user access, reset challenge questions or permanently delete a user.

NOTE: The Security Maintenance functions can also be accessed from the **Quick Links** on the Administration Console main page.

**Manage Users** ➕ Add a New User

Ken Allen Edit Profile

**Services** INTERNET BUSINESS BANKING Edit | Remove

**Quick Links** Manage User Phones

**Edit User Profile**

John Doe, ABC COMPANY

User ID : **ub19092**

Last Valid Login : **05/21/13-13:10**

Last Contact Info Review : **04/12/13-15:29**

**Edit User Info**

**Security Maintenance** ⓘ

**User Access Status:** Active

**Challenge Questions Status:**

**Edit User Information**

\* = Required Field

User ID : **ub19092**

\* First Name : Ken

Middle Name :

\* Last Name : Allen

\* Email : uXXXXX2@unionbank.com

\* Mother's Maiden Name :

\* City of Birth :

User Type : Web Admin

Send High Risk Transactions email

Notify user by email about offers, promotions, and new products

Cancel ➔ Update

**Edit User Info**

User ID : **ub19092**

Last Valid Login : **05/21/13-13:10**

Last Contact Info Review : **04/12/13-15:29**

First Name : Ken

Middle Name :

Last Name : Allen

Email Address : uXXXXX2@unionbank.com

Mother's Maiden Name :

City of Birth :

Send High Risk Transactions email : Yes

**Security Maintenance** ⓘ **6**

**User Access Status:** Active

**Challenge Questions Status:** Active

**Last Password Change:** 05/17/13-07:20

**Last Challenge Questions Change:** 04/05/12-13:34

Issue Temporary Password

Manage User Phones **5**

# Manage User Access

Deleting users permanently is appropriate if individuals leave the organization or change roles.

## Delete user permanently

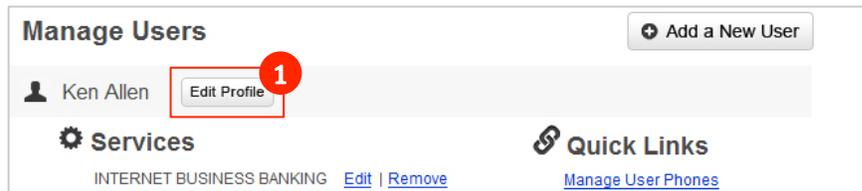
- 1 Click **Edit Profile** next to the user's name.
- 2 On the Edit User Profile page, in the Security Maintenance section, select Permanently Delete User.

NOTE: Once a user is permanently deleted, that user's entitlements can not be copied over to another user.

A prompt will appear, asking you to confirm the request

- 3 Click **Delete**, and you will receive a confirmation.

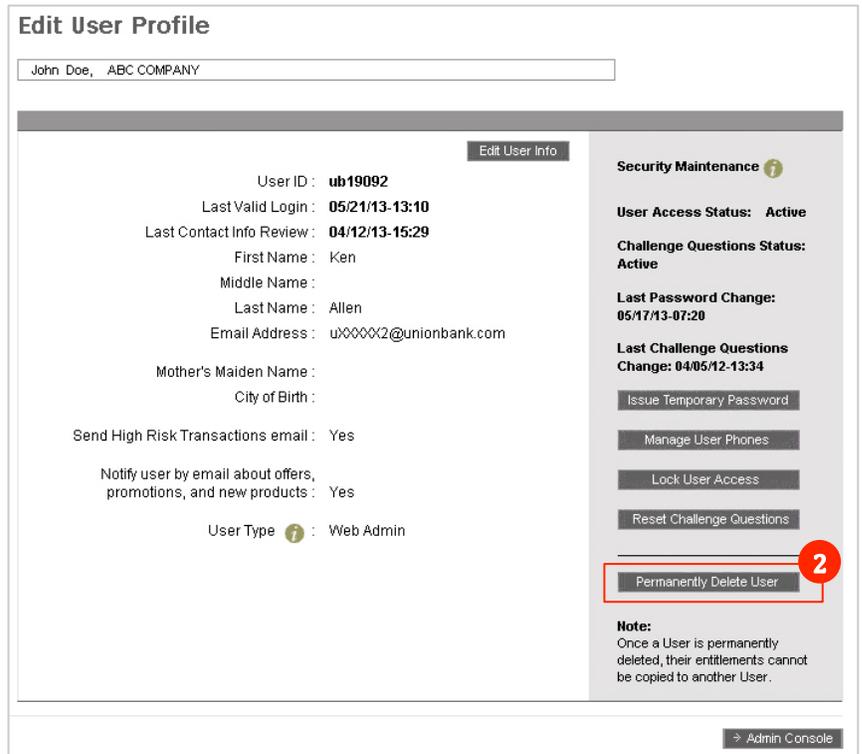
NOTE: Once you permanently delete a user, that user will be removed from the system and cannot be automatically reinstated.



**Manage Users** ➕ Add a New User

Ken Allen Edit Profile

**Services** INTERNET BUSINESS BANKING [Edit](#) | [Remove](#) Quick Links [Manage User Phones](#)



**Edit User Profile**

John Doe, ABC COMPANY

**Edit User Info**

User ID : **ub19092**  
Last Valid Login : **05/21/13-13:10**  
Last Contact Info Review : **04/12/13-15:29**  
First Name : Ken  
Middle Name :  
Last Name : Allen  
Email Address : uXXXXX2@unionbank.com  
Mother's Maiden Name :  
City of Birth :  
Send High Risk Transactions email : Yes  
Notify user by email about offers, promotions, and new products : Yes  
User Type ? : Web Admin

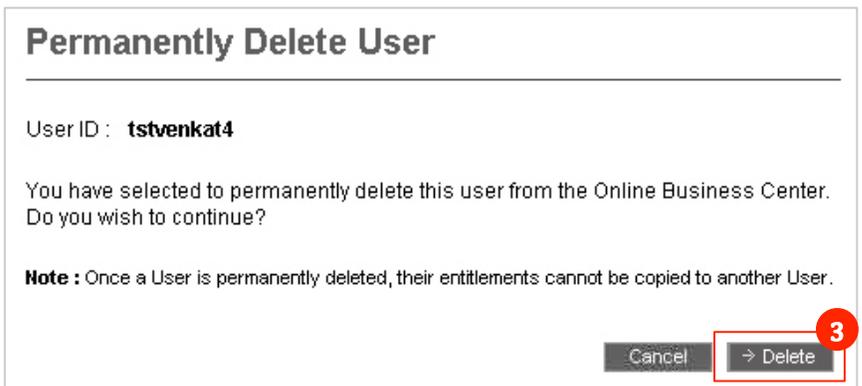
**Security Maintenance** ?

User Access Status: **Active**  
Challenge Questions Status: **Active**  
Last Password Change: **05/17/13-07:20**  
Last Challenge Questions Change: **04/05/12-13:34**

[Issue Temporary Password](#)  
[Manage User Phones](#)  
[Lock User Access](#)  
[Reset Challenge Questions](#)  
**Permanently Delete User**

**Note:**  
Once a User is permanently deleted, their entitlements cannot be copied to another User.

[Admin Console](#)



**Permanently Delete User**

User ID : **tstvenkat4**

You have selected to permanently delete this user from the Online Business Center. Do you wish to continue?

**Note :** Once a User is permanently deleted, their entitlements cannot be copied to another User.

[Cancel](#) [→ Delete](#)

# Control User Access to Services and Accounts

## Enroll a User in a Service.

- 1 Click on the **Enroll** link for each service you would like to give a user.
- 2 On the Enroll user in Service page, select the appropriate entitlements for the user.
- 3 Click **Submit** to complete the request.

NOTE: Repeat this process for each service you want to make available to the user.

**Administration Console**  
John Doe, ABC COMPANY

Note: Please turn off pop-up blockers to ensure that you can see all options.

**Manage Users** ➕ Add a New User

Ken Allen Edit Profile

**Services**  
INTERNET BUSINESS BANKING Enroll **1**  
ONLINE STATEMENTS Enroll

**Quick Links**  
[Manage User Phones](#)  
[Lock User Access](#)

**Enroll User in Service**  
John Doe, ABC COMPANY

You are viewing information for **Internet Business Banking**.

Entitlements for User ID ub19092, Ken Allen

Select the accounts for this User to access and designate an access level, then click 'Submit' to implement these changes.

Click 'Select All' to enable access to all accounts shown.

To duplicate an existing user's assigned accounts, select 'Copy Another User.' ➔ Copy Another User

**User Access**  
User Type: Web Administrator ?  
Web Administrator  
Web User  
View Only Web User  
➔ Select All

Account Access			
Account	Add Account <span>?</span>	Account	Add Account <span>?</span>
Savings Account 5528	<input type="checkbox"/>	Money Market Savings 9348	<input checked="" type="checkbox"/>
Business Checking 4303	<input type="checkbox"/>	Checking 7893	<input type="checkbox"/>

➔ Return to Admin Console ➔ Reset ➔ Submit **3**

# Control User Access to Services and Accounts

## Copy user entitlements for fast enrollment.

- 1 On the Enroll user in Service page, click **Copy Another User**.
- 2 Select the user whose assigned accounts and entitlements you want to copy. Click **Submit**.

You will be taken back to the Enroll user in Service page, where you can add or delete user entitlements as appropriate.

- 3 Click **Submit** to complete the request.

NOTE: You will receive a confirmation number.

### Enroll User in Service

John Doe, ABC COMPANY

You are viewing information for **Internet Business Banking**.

Entitlements for User ID ub19092, Ken Allen

Select the accounts for this User to access and designate an access level, then click 'Submit' to implement these changes.

Click 'Select All' to enable access to all accounts shown.

To duplicate an existing user's assigned accounts, select 'Copy Another User' **1**

### Copy the Services of an Existing User

John Doe, ABC COMPANY

**The user John Doe is created successfully.**

Copy	Last Name	First Name	INTERNET BUSINESS BANKING	INFORMATION REPORTING	ONLINE STATEMENTS	STOP PAYMENTS
<input type="checkbox"/>	Allen	Ken <b>2</b>				
<input type="checkbox"/>	b	i				
<input type="checkbox"/>	bach	james				
<input type="checkbox"/>	Baes	Conrad	✓		✓	
<input type="checkbox"/>	basso	sonia				

3

# Control User Access to Services and Accounts

## Remove a user's access to a Service.

- 1 Click on the **Remove** link next to the Service.
- 2 Confirm by clicking **OK**.

**Administration Console**  
John Doe, ABC COMPANY

Note: Please turn off pop-up blockers to ensure that you can see all options.

**Manage Users** ➕ Add a New User

Ken Allen Edit Profile

**Services**

INTERNET BUSINESS BANKING	<a href="#">Edit</a> <a href="#">Remove</a>
ONLINE STATEMENTS	<a href="#">Enroll</a>
OPEN ACCOUNTS	<a href="#">Enroll</a>

**Quick Links**

- [Manage User Phones](#)
- [Lock User Access](#)
- [Issue Temporary Password](#)

Message from webpage

?

You have elected to remove Heather Robinson from INTERNET BUSINESS BANKING.  
Do you wish to continue?

OK Cancel

# Control User Access to Services and Accounts

## Add or Remove Account Access.

- 1 Click on the **Edit** link next to the service.
- 2 Select (or deselect) the account(s) you want the user to access. When a new account becomes available, you can easily assign User Access to that account.

NOTE: If you do not see an account that you own in the list, please contact your Branch or Relationship Manager.

- 3 Click **Submit** to complete the request.

NOTE: You will receive a confirmation number.

**Manage Users** ➕ Add a New User

Ken Allen Edit Profile

**Services**

- INTERNET BUSINESS BANKING Edit Remove
- ONLINE STATEMENTS Enroll
- OPEN ACCOUNTS Enroll

**Quick Links**

- [Manage User Phones](#)
- [Lock User Access](#)
- [Issue Temporary Password](#)

**Edit User Entitlements**

John Doe, ABC COMPANY

You are viewing information for **Internet Business Banking**.

Entitlements for User ID ssoconrad, Conrad Baes

Select the accounts for this User to access, or modify the access level,  
'Submit' to implement these changes.

Click 'Select All' to enable access to all accounts shown.

**User Access**

User Type: Web User ?

→ Select All

Account Access			
Account	Add or Remove Account	Account	Add or Remove Account
Savings Account 5528	<input checked="" type="checkbox"/>	Money Market Savings 9348	<input checked="" type="checkbox"/>
Business Checking 4303	<input checked="" type="checkbox"/>	Checking 7893	<input type="checkbox"/>

→ Return to Admin Console → Reset → Submit

# Manage Security Settings

The User Security Settings feature allows you to easily manage the automatic expiration of user passwords and lock inactive users. The setting can be modified at any time, and changes will take effect immediately.

## Set password expirations and rules for inactive users.

**1** In the Resources section, select **User Security Settings**

**2** Enter the required information:

The **Password Expiration Limit** and **Password Warning Threshold** can be set between 0 and 365 days. The Password Warning Threshold must be less than the Password Expiration Limit.

The inactive user lock can be set between 0 and 999 days.

Enter a 0 for any parameter that you wish to turn off.

NOTE: Where security and sensitive information is a concern, good values are between 60-90 days.

**3** Click **Submit** to complete the change.

le

ensure that you can see all options.

[+ Add a New User](#)

**Resources**

- [Change Requests](#)
- [Current Fee Schedule](#)
- [IP Restrictions](#)
- [User Security Settings](#)

**Quick Links**

- [Edit](#) | [Remove](#)
- [Manage User Phones](#)

### User Security Settings

John Doe, ABC COMPANY

A company-wide password expiration limit in calendar days can be established for all of your users in the Online Center. This would force your users to establish new passwords periodically. You can set a warning threshold to users to change their passwords a certain number of days before their passwords expire.

The Online Business Center also allows you to lock the passwords of users who have been inactive for a long period of time. A locked password must be reset in order for the user to successfully sign on.

Please make your selections, and click on Submit.

Password Expiration Limit  Days  
(Enter 0 if passwords never expire)

Password Warning Threshold  Days  
(Enter 0 for no warning)

Lock Inactive Web Users After  Days  
(Enter 0 if users are never locked)

[Cancel](#) [→ Submit](#)

# Manage Security Settings

The Quick Links allow you to, Lock or Unlock user's Access; issue a New Temporary Password or Reset Challenge Questions.

## Lock or Unlock User Access.

If the user is currently not locked, click Lock User Access

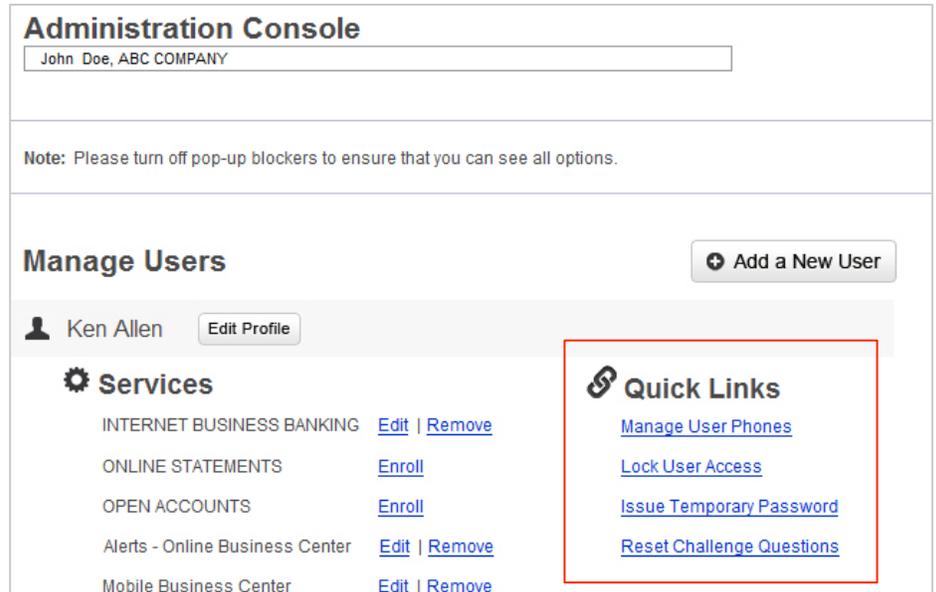
If the user is currently locked, click Unlock User Access

## Reset or issue temporary Password.

Click Issue Temporary Password – an email will be sent to the email address on file for that user.

## Reset Challenge Questions.

Click Reset Challenge Questions – an email with a prompt will be sent to the email address on file for that user.



The screenshot shows the Administration Console interface. At the top, it displays the user name "John Doe, ABC COMPANY". Below this is a note: "Note: Please turn off pop-up blockers to ensure that you can see all options." The main section is titled "Manage Users" and includes a button to "Add a New User". Underneath, the user "Ken Allen" is selected, with an "Edit Profile" button. A "Services" list includes: INTERNET BUSINESS BANKING (Edit | Remove), ONLINE STATEMENTS (Enroll), OPEN ACCOUNTS (Enroll), Alerts - Online Business Center (Edit | Remove), and Mobile Business Center (Edit | Remove). A "Quick Links" box on the right contains: Manage User Phones, Lock User Access, Issue Temporary Password, and Reset Challenge Questions.