User Roles

Contents

User Role Overview

The User Role controls feature entitlements and dollar limits for one or more company users who have the need for identical Online access.

1. Select the 'User Roles' option in the 'Commercial Functions' menu.

2. Select the pencil icon to the right of the user role name.

3. Select an online transaction type by clicking on the corresponding blue link. (ex. Payroll)

Allowed Actions

NOTE: One or multiple levels may be setup to establish general or granular user limitations.
Example figure

4. Click on the 'Operations' box. Specify the allowed actions for the transaction type.

5. Click on the 'Amount' box. Specify the dollar amount for the allowed action.

6. Click on the 'Accounts' box. Select the account(s) allowed for this transaction type.

NOTE: The account(s) will turn red when selected.

7. Click the 'Subsidiaries' box. Select the subsidiarie(s) allowed for this transaction type.

NOTE: The subsidiary(ies) will turn red when selected.
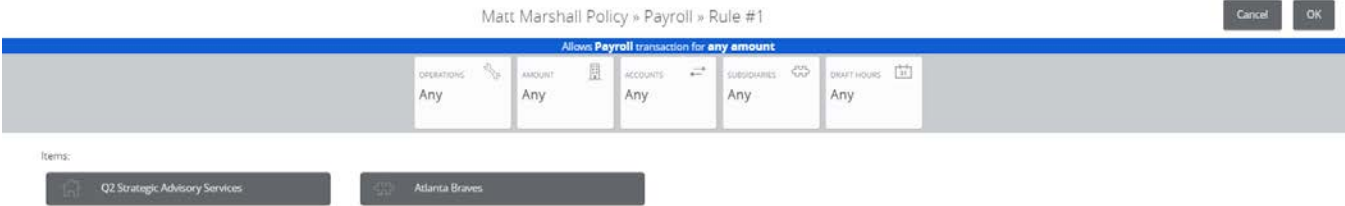
8. Click the 'Draft Hours' box. Select the days and hours allowed for this transaction type.

NOTE: The days of the week down the left side and the hours of the day across the top can be clicked to select an entire row or column. The individual boxes can also be selected or deselected.
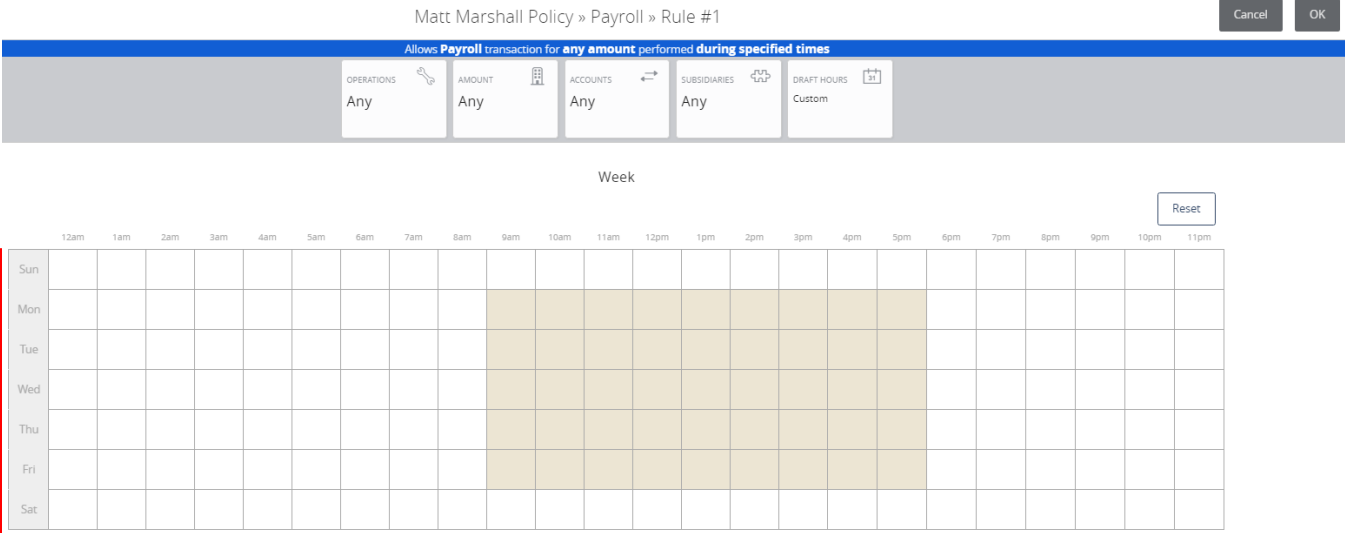
9. Click the 'Policy Tester' to validate the User Role functionality to assure the setup is as needed.

Rights

➢ **The user role's ability to view transactions in the 'Activity Center'.**

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Overview	Features	Accounts

PAYROLL Change   Enabled ▢

Allowed Actions	Rights	Approval Limits

View Online Activity   👥   Can view all transactions.

a. Can view transactions initiated by any online banking user within the company.

View Online Activity   👥   Can view all transactions.

b. Can only view the user's own transactions.

View Online Activity   👤   Can view own transactions.

c. Can view transactions initiated by users who are assigned to the same user role.

View Online Activity   👥   Can view transactions by others in this role.

d. Cannot view any transactions.

View Online Activity   🚫   Cannot view any transactions.

Approval Limits

Click the 'Approval Limits' tab to view and modify the dollar and count limits allotted to the company by United Community Bank.

Maximum Amount

1. Per Transaction – Maximum dollar amount for an individual transaction

2. Per Account per Day – Maximum dollar amount per day allotted for each entitled account

3. Per Day – Maximum dollar amount per day allotted for the user (regardless of the account)

4. Per Month – Maximum dollar amount per month allotted for the user (regardless of the account)

Maximum Count

1. Per Account per Day – Maximum number of transactions per day allotted for each entitled account

2. Per Day – Maximum number of transactions per day allotted for the user (regardless of the account)

3. Per Month – Maximum number of transactions per month allotted for the user (regardless of the account)

Features

Click on the 'Features' tab to view and modify the non-transactional features allotted to the user role by the Company Administrator.

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Overview   **Features**   Accounts

FEATURES

RIGHTS

Manage Templates	✓	Manage Users	✓
Manage Recipients	✓	Allow one-time recipients	✓
Can view all recipients	✓	Enable Recipient Upload	✓
Enable Wire Upload	✓	View Wire Activity	✓
Access Incoming/Outgoing Wire Alerts	✓	Enable Recipient Upload from Batch	✓
Enable Wire Upload from Batch	✓		

TREASURY

Manage User Roles	✓	Manage Company Policy	✓
Information Reporting	✓		

GENERATED TRANSACTION

Enable Multi-Transfer	✓	Enable Multi-Wire	✓

Accounts

Click on the 'Accounts' tab to view and modify the account entitlements allotted to the user role by the Company Administrator.

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Overview   Features   Accounts

ACCOUNTS

Number	Name	View ☐	Deposit ☐	Withdraw ☐	Labels
xxx3465	External Checking	🔒	✓	✓	
2001800064	Business Value Checking	✓	✓	✓	
42867	Business Value Checking	✓	✓	✓	
42865	Business Value Checking	✓	✓	✓	
5003413557	Commercial Non-Real Estate Loan	✓	✓	✓	
12345	United Savings	✓	✓	✓	