Business Online Banking

What's Changing

Because of changes we're making to your online banking functionality, you will have new features we think you will use frequently. This document shows some of the differences and how to use them.

Users and User Roles

Before…	Now…
Users and their entitlements were tied to each individual person. When you made changes to two people with the same role, you had to make those changes individually.	You can create user "roles". This means you'll create a role, add multiple users to the role and only change entitlements once in the role. You also have more choices to set for each role such as what accounts you want them to have access to, restricting time of day and day of the week they can make changes, as well as setting approval limits and actions.

Here's an overview of what your new interface looks like and how easy it is to make the changes. To see a full description with detailed instructions in our "Business Digital Banking User Guide", click here.

Just after you are converted to the new platform, all your existing users will be transferred to the new interface. Each user will be imported as a new user role. If you have more than one person doing the same job, here are the steps you will follow. You may need to set only some of these, or all, depending on your needs. Click on each link to go directly to the instructions in the user guide.

1. Create a new user role.
2. Add the users to the role.
3. Choose a transaction to edit in user roles.
4. Establish transaction type rights and approval limits.
5. Disable a transaction type and set allowed actions.
6. Enable Operation rights and choose the maximum draft amount.
7. Enable allowed accounts and choose drafting hours.

Enhanced Security

For some transactions a token will be required to initiate, with an additional user required to approve.

See the section in the user guide for Viewing, Approving or Canceling a Transaction.

Reports

You will now have access to reporting including ACH and Cash position reports. See the user guide for more information on Reporting.