Remote Deposit Administration Guide

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User Guide – Remote Deposit Administration

Introduction to Remote Deposit Administration

This user guide will cover the functions available to a Remote/Mobile Deposit Admin.

Fig 1

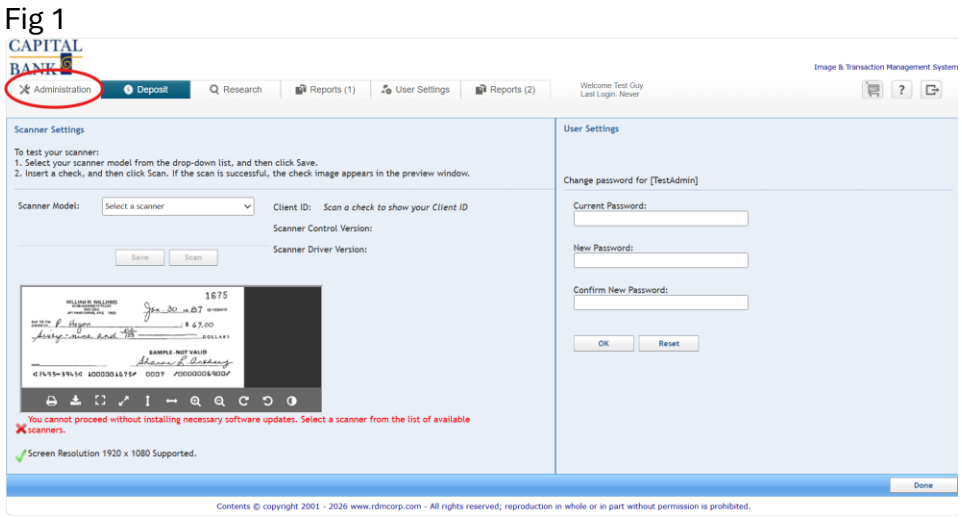


Fig 2

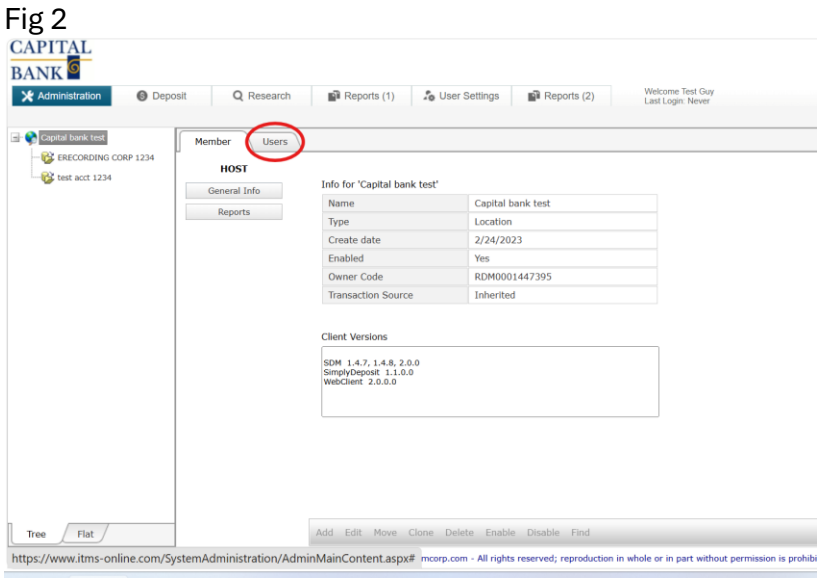
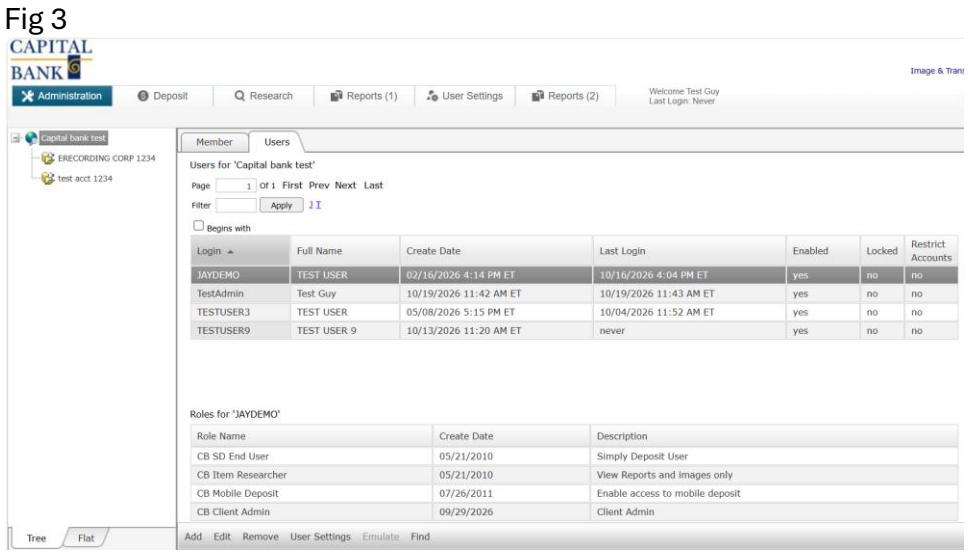


Fig 3



Navigation

1) Click on the 'Administration' tab displayed on the far left of the Home page. (Fig 1)

2) Then click on the 'Users' tab in the upper middle of the page. (Fig 2)

3) You will see all the current users and their status. Users will be able to login and reset their own passwords as long as the 'Enabled' column shows a 'yes' and the 'Locked' column reads 'no'. (Fig 3)

4) The options at the bottom of the page are the various admin features you have access to:

   a) Add – use this to create a new user
   b) Edit – use this to edit an existing user and to re-enable and/or unlock their profile
   c) Remove – deletes the user that is currently selected
   d) User Settings – this allows an admin to reset passwords, security questions, and mobile phone registration
   e) Find – Popup box that helps to quickly find a user that is not on the front page of the users tab

Fig 4

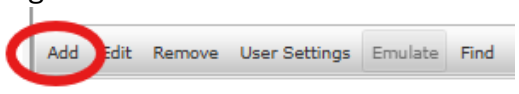


Fig 5

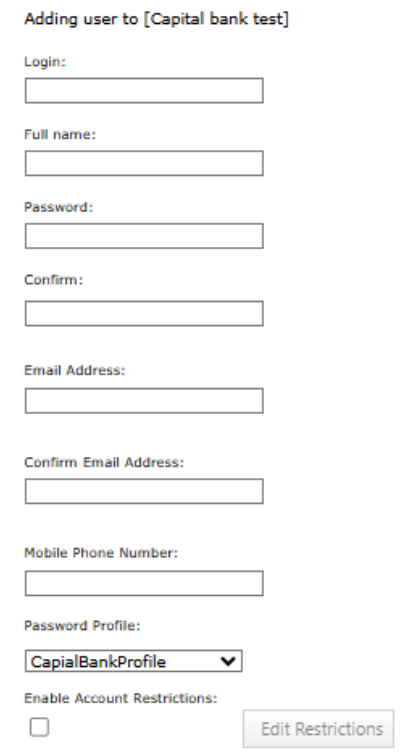
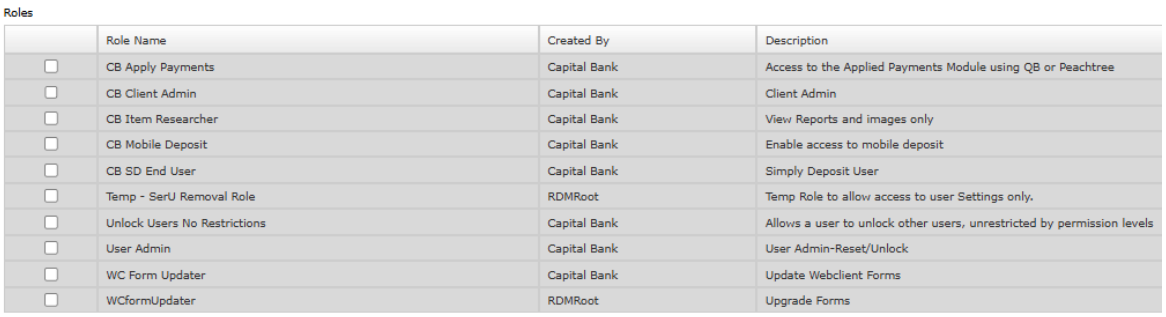


Fig 6



Creating a New User

1) Click the 'Add' button at the bottom of the page. (Fig 4)

2) Fill in the blanks for the new user. If the user should bot have access to all accounts, select the "Enable Account Restrictions' check box and then click the 'Edit Restrictions' box to select which accounts the user should have access to. (Fig 5)

3) In the 'Roles' section, select the checkbox next to the options that should be enabled for the new user. (Fig 6) The roles below are the only options that are active:

   a) CB Client Admin – enables the user full admin access
   b) CB Item Researcher – allows the user to view deposits and run reports.
   c) CB Mobile Deposit – allows the user to make deposits via the mobile app
   d) CB SD End User – grants access to the desktop deposit module

4) Click the 'Ok' button to save the user or the 'Cancel' button to return to the previous page without saving.

5) Supply the new user with their Login name and the password that were created. They will change the password on first login.

Fig 7

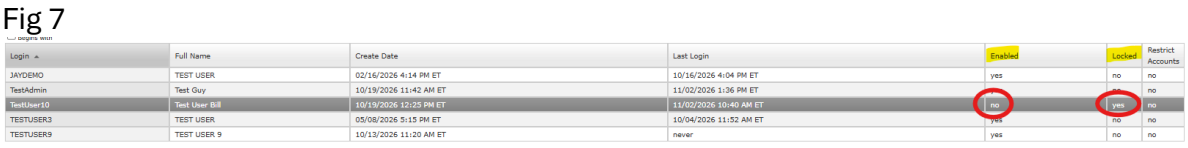


Fig 8

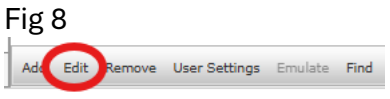


Fig 9



Unlocking/Enabling Users

1) Click on the 'Users' tab then select the user you would like to work on. (Fig 7)

2) Click 'Edit' at the bottom of the page. (Fig 8)

3) Make sure the 'Enabled' box is checked and that the 'Locked' box is not checked. (Fig 9)

4) Click the 'Ok' button to save the user or the 'Cancel' button to return to the previous page without saving.

Fig 10

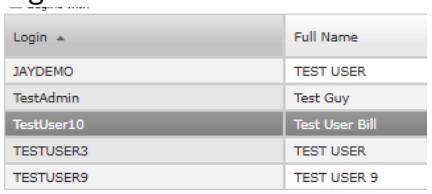


Fig 11



Fig 12

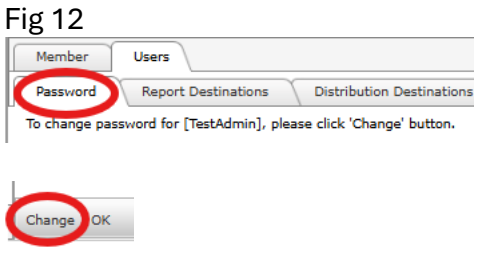


Fig 13



Resetting a Password

1) Click on the 'Users' tab then select the user you would like to work on. (Fig 10)

2) Click 'User Settings' at the bottom of the page. (Fig 11)

3) Make Sure the 'Password' tab is selected, then click 'Change' at the bottom of the page. (Fig 12)

4) Complete both new password fields and click 'Ok'. (Fig 13)