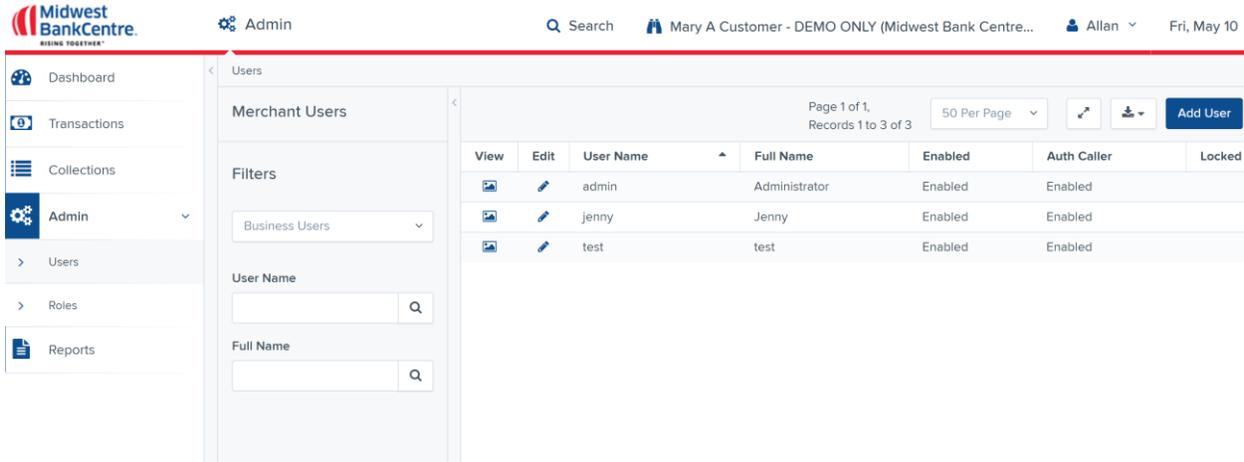


Adding or Managing RDC Users:

Adding a New User:

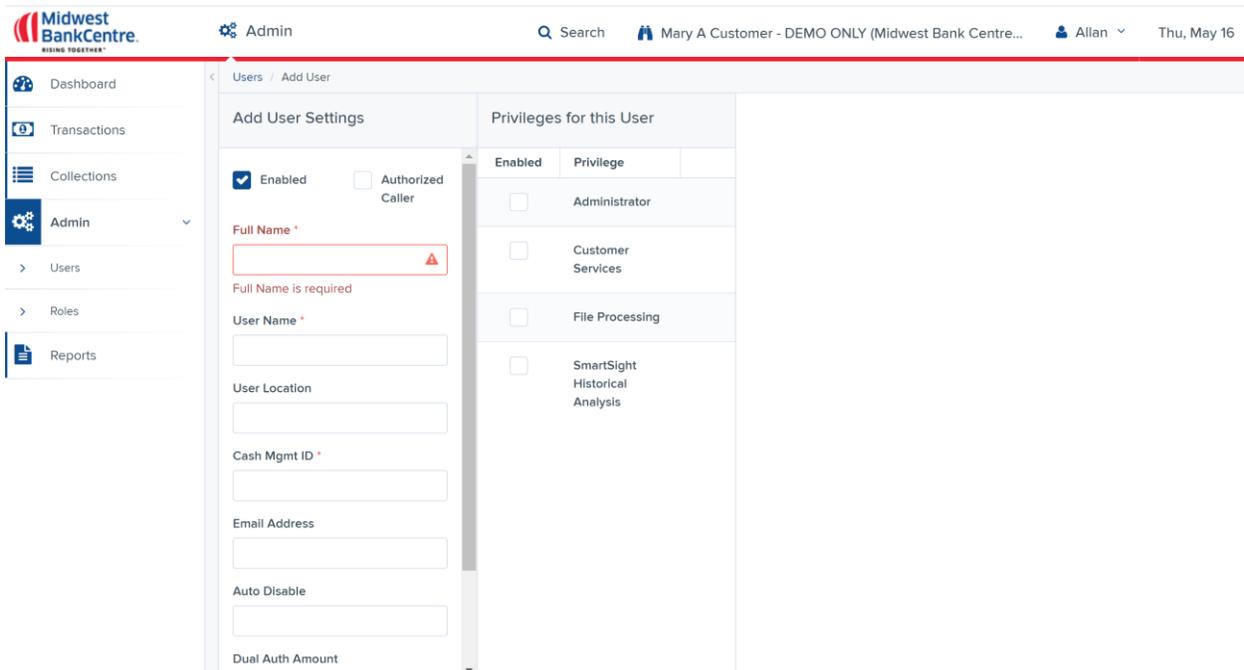
To create a new user you will first click on the **Admin** tab on the left side of your screen, and click on the **User** tab that drops down to bring up your current user list as shown below.



The screenshot shows the Midwest BankCentre Admin interface. The top navigation bar includes the logo, 'Admin' tab, search bar, user profile 'Mary A Customer - DEMO ONLY', and the date 'Fri, May 10'. The left sidebar contains navigation options: Dashboard, Transactions, Collections, Admin (selected), Users, Roles, and Reports. The main content area is titled 'Users' and shows a list of 'Merchant Users'. The list has columns for View, Edit, User Name, Full Name, Enabled, Auth Caller, and Locked. Three users are listed: 'admin' (Administrator), 'jenny', and 'test'. An 'Add User' button is in the top right. Below the list are search filters for 'Business Users', 'User Name', and 'Full Name'.

View	Edit	User Name	Full Name	Enabled	Auth Caller	Locked
		admin	Administrator	Enabled	Enabled	
		jenny	Jenny	Enabled	Enabled	
		test	test	Enabled	Enabled	

Next, you will click on the blue **Add User** button in the top right of your screen. After clicking on the **Add User** button, you will see a blank user settings screen as shown below. You will enter the user's first and last name in the top box, and if they currently have regular online banking ID with Midwest BankCentre, you will add it in the second box. If the user is going to be a scanning-only user, the second box will be the user ID they use to log into the site. Re-enter the user ID in the box labeled Cash Mgmt ID. ***NOTE** – you will not be able to look up an existing online banking user's Cash Mgmt ID, you will need to contact our helpdesk at tmhelpdesk@midwestbankcentre.com and they will be able to add the correct ID after the user has been created. An email address will need to be added for the user as well.



The screenshot shows the 'Add User' settings screen in the Midwest BankCentre Admin interface. The top navigation bar is the same as the previous screenshot, but the date is 'Thu, May 16'. The left sidebar is also the same. The main content area is titled 'Users / Add User' and is split into two panels: 'Add User Settings' and 'Privileges for this User'. The 'Add User Settings' panel has a 'Enabled' checkbox checked and an 'Authorized Caller' checkbox unchecked. Below are input fields for 'Full Name *' (with a red error message 'Full Name is required'), 'User Name *', 'User Location', 'Cash Mgmt ID *', 'Email Address', 'Auto Disable', and 'Dual Auth Amount'. The 'Privileges for this User' panel has a table with columns 'Enabled' and 'Privilege'. The privileges listed are Administrator, Customer Services, File Processing, and SmartSight Historical Analysis, all with unchecked 'Enabled' checkboxes.

Enabled	Privilege
<input type="checkbox"/>	Administrator
<input type="checkbox"/>	Customer Services
<input type="checkbox"/>	File Processing
<input type="checkbox"/>	SmartSight Historical Analysis

For a standard scanning user, your screen should look like the below before clicking the green **Add** button in the bottom right of the screen. If you intend for the new user to have full Administrative privileges, you would also check the **Administrator** option at this time. Click the green **Add** button to create the user.

The screenshot shows the Midwest BankCentre Admin interface. The top navigation bar includes the logo, 'Admin' menu, search, user profile, and date. The left sidebar contains navigation options: Dashboard, Transactions, Collections, Admin (selected), Users, Roles, and Reports. The main content area is titled 'Users / Add User' and is split into two panels: 'Add User Settings' and 'Privileges for this User'.

Add User Settings

- Enabled
- Authorized Caller
- Full Name: Demo Test
- User Name: Scanner123
- User Location: [Empty]
- Cash Mgmt ID: Scanner123
- Email Address: test@midwestbankcentre.com
- Auto Disable: [Empty]
- Dual Auth Amount: 0

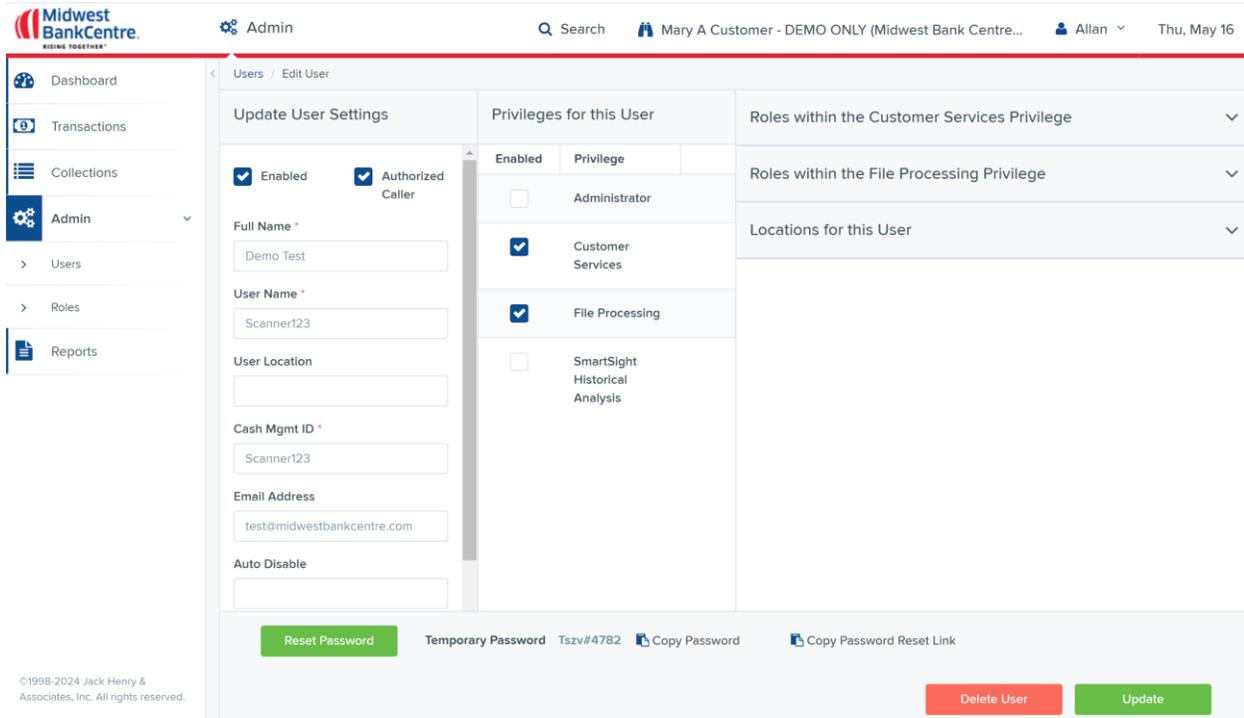
Privileges for this User

Enabled	Privilege
<input type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	Customer Services
<input checked="" type="checkbox"/>	File Processing
<input type="checkbox"/>	SmartSight Historical Analysis

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Add

After clicking Add you will see the new user's temporary password displayed at the bottom of the screen. It will time out after 24 hours, so if the user logs in after that time you will need to reset the password first. At this point you will now need to add the roles and account access for the new user.



The roles you will need to select are located under the **Roles within the Customer Services Privilege** tab. The standard roles selected are shown below. ***NOTE** – in order for a user to be able to complete and close a deposit, the **RDC Admin** option must be selected. This does not give the user overall Admin privileges. To make a user an Admin you would select that option under the **Roles within the Administrator Privilege** tab.

Enabled	Role Name	Description
<input checked="" type="checkbox"/>	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
<input checked="" type="checkbox"/>	Accounting	All Reporting Functionality
<input checked="" type="checkbox"/>	RDC Admin	Remote Deposit Complete Administrator
<input checked="" type="checkbox"/>	RDC User	Remote Deposit Complete User
<input type="checkbox"/>	Reconciliation Report	Allow User to view Reconciliation Report
<input type="checkbox"/>	Customer Data Privacy	User can view the page, generate report, and forget customer

To select which accounts a user should have access to, you will want to check any necessary accounts under the **Locations for this User** tab as shown below.

Locations for this User		
Enabled	Location Name	Location Enabled
<input checked="" type="checkbox"/>	Headquarters	✓
<input type="checkbox"/>	Mary A Customer DBA Marys Delights	✓

Editing an Existing User:

To make changes to an existing user you will first click on the **Admin** tab on the left side of your screen. Next you will click on the **Users** tab that drops down as shown in the image below, and a list of all users will show up in the center of your screen.

The screenshot displays the Midwest BankCentre Admin interface. The top navigation bar includes the Midwest BankCentre logo, a search bar, and the user's name 'Allan' with a dropdown arrow. The left sidebar contains navigation options: Dashboard, Transactions, Collections, Admin (selected), Users, Roles, and Reports. The main content area is titled 'Users' and shows a list of 'Merchant Users'. The list has columns for View, Edit, User Name, Full Name, Enabled, Auth Caller, and Locked. Three users are listed: 'admin' (Administrator), 'jenny' (Jenny), and 'test' (test). All are enabled. A filter dropdown is set to 'Business Users'. Search fields for 'User Name' and 'Full Name' are present. The page shows 'Page 1 of 1, Records 1 to 3 of 3' and a '50 Per Page' dropdown. An 'Add User' button is in the top right.

View	Edit	User Name	Full Name	Enabled	Auth Caller	Locked
		admin	Administrator	Enabled	Enabled	
		jenny	Jenny	Enabled	Enabled	
		test	test	Enabled	Enabled	

Click on the Edit button next to the user you would like to make changes to, and you will see the screen below.

Midwest BankCentre
Admin

Users / Edit User

Update User Settings

Privileges for this User

Roles within the Administrator Privilege

Roles within the Customer Services Privilege

Roles within the SmartSight Historical Analysis Privilege

Locations for this User

Enabled Location Name Location Enabled

Enabled Privilege

Enabled Location Name Location Enabled

Reset Password Delete User Update

If you are needing to reset a user's password, click on the green Reset Password button in the bottom left and a temporary password will generate and display to the right of the Reset Password button as shown below. The user will be prompted to create their new password at the next log in.

Reset Password Temporary Password Lfxc#9905 Copy Password Copy Password Reset Link

Delete User Update

If you have recently added a new account to have scanning access, you can give your users access to the new account by clicking on the **Locations For This User** tab as shown below and checking the box for the new account. To finalize the change you will need to click the green **Update** button in the bottom right of the screen.

Locations for this User

Enabled	Location Name	Location Enabled
<input checked="" type="checkbox"/>	Headquarters	✓
<input type="checkbox"/>	Mary A Customer DBA Marys Delights	✓

A user's roles won't commonly need to be adjusted after they have been created, but if you do need to add or remove any you will click on the **Roles Within the Customer Services Privilege** tab and will see the below options.

Roles within the Administrator Privilege		
Roles within the Customer Services Privilege		
Enabled	Role Name	Description
<input checked="" type="checkbox"/>	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
<input checked="" type="checkbox"/>	Accounting	All Reporting Functionality
<input checked="" type="checkbox"/>	RDC Admin	Remote Deposit Complete Administrator
<input checked="" type="checkbox"/>	RDC User	Remote Deposit Complete User
<input type="checkbox"/>	Reconciliation Report	Allow User to view Reconciliation Report
<input type="checkbox"/>	Customer Data Privacy	User can view the page, generate report, and forget customer

The options selected in the picture above are the standard options for scanning users. ***NOTE** – in order for a user to be able to complete and close a deposit, the **RDC Admin** option must be selected. This does not give the user overall Admin privileges. To make a user an Admin you would select that option under the **Roles within the Administrator Privilege** tab.

Disabling (Deleting) a User:

To delete an existing user you will just need to click on the **Admin** tab on the left of the screen, then click **Users**, and finally click **Edit** next to that user's name. Once the User Settings screen is open like in the below picture, you just need to click on the red **Delete User** button.

The screenshot shows the 'Edit User' interface in the Midwest BankCentre Admin system. The user being edited is 'Demo Test' with the username 'Scanner123'. The interface is divided into several sections:

- Update User Settings:** Includes fields for Full Name (Demo Test), User Name (Scanner123), User Location, Cash Mgmt ID (Scanner123), Email Address (test@midwestbankcentre.com), and an Auto Disable checkbox.
- Privileges for this User:** A table with columns 'Enabled' and 'Privilege'.

Enabled	Privilege
<input type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	Customer Services
<input checked="" type="checkbox"/>	File Processing
<input type="checkbox"/>	SmartSight Historical Analysis
- Roles within the Customer Services Privilege:** A dropdown menu showing selected roles: 'Roles within the Customer Services Privilege', 'Roles within the File Processing Privilege', and 'Locations for this User'.

At the bottom of the interface, there is a 'Reset Password' button, a 'Temporary Password' field (Tszv#4782), and 'Copy Password' and 'Copy Password Reset Link' buttons. At the very bottom, there are 'Delete User' (red) and 'Update' (green) buttons.

