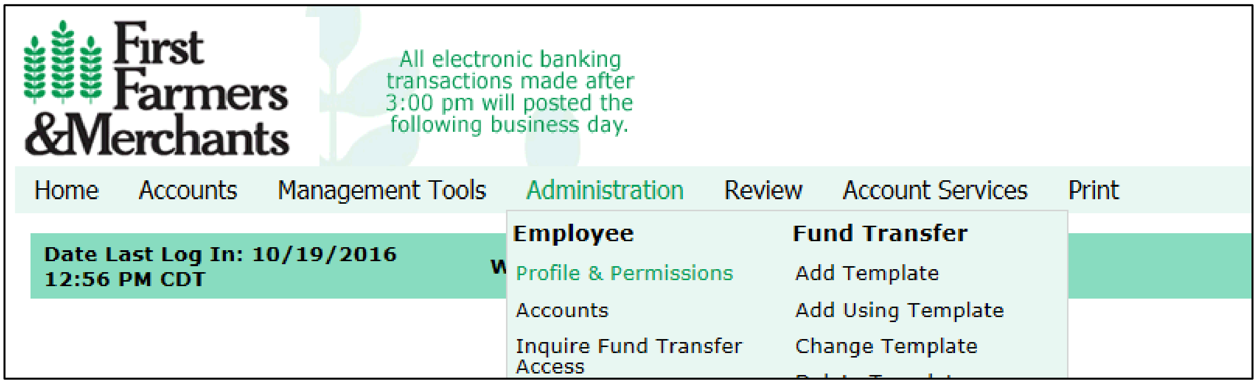
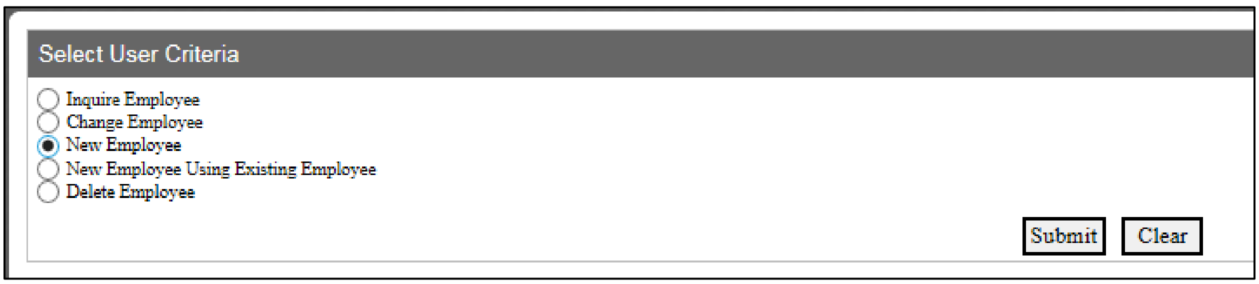
Adding a new Enhanced e-Corp employee

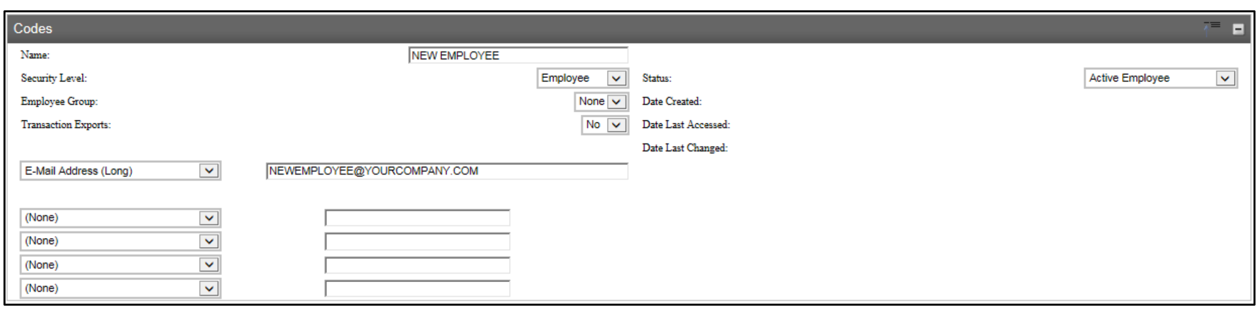
Under Administration then Employees click on Profiles and Permissions



Click the radio button next to New Employee. If you already have an employee set up and want to copy their permission, click the radio button next to New Employee Using Existing Employee.



Below is a summary of each section of the employee setup. See note below each screen shot for required fields. If the field name is not mentioned below the screen shot it is not required or the default is used.



Name – Enter the employee Name
Security Level – enter the appropriate security level for this employee

a. **Employee** – Has no access to client administration.
b. **Supervisor** – Has access to client administration but can only maintenance employees in their own employee display group.
c. **Administrator** – Has access to client administration and can maintenance any employee or supervisor.

Employee group - This is an optional field. Employee groups are used to group employees. An example could be "secretaries"; "loan assistants"; "management," etc. This field can be anything the client wants and can be set up at any time on-line.

Transaction Exports - If set to yes, this employee will have the ability to export transactions into a financial program, such as Quickbooks

E-Mail Address Long – Enter the employee's business or personal email address

E-Mail Address – Enter the employee's business or personal email address

Business Phone – Enter the employee's business phone number

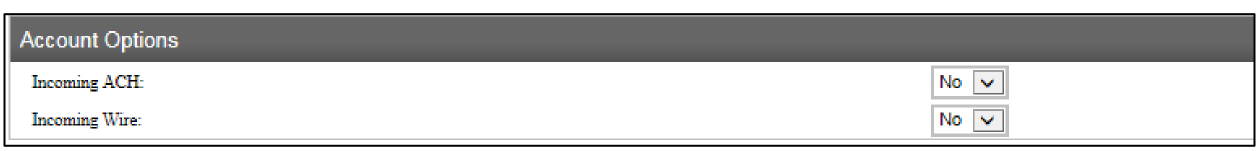
Access ID – Enter the Access ID the employee will use to log in to e-Corp. The user code needs to be between six and fifteen characters long and can be alpha, numeric or a combination.

Change Password – Enter a temporary password and the employee will be prompted to change it the first time they log in. Passwords must be 12-17 characters in length and require one upper case letter, one lower case letter, one number and one special character such as !$*.

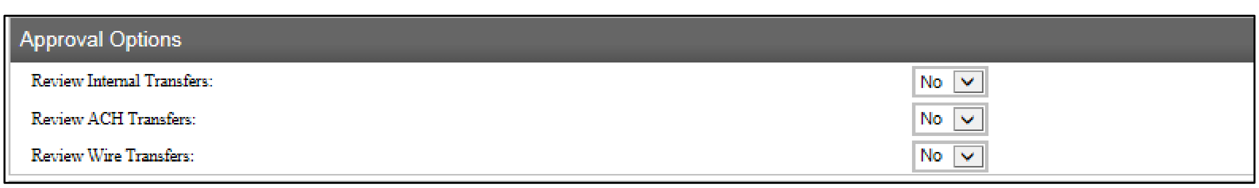
Token Status – Set to Pending Enablement. You will need to notify your Business Banker that you have set up a new employee. The token number will be entered by the bank, and the token will be sent to the employee. The first time they log in they will be asked to setup the token.

*If this employee will not be originating ACH Transfers, this step may be skipped

Role Name – select the appropriate role for this employee



Incoming ACH – Set this to Yes if you would like this employee to view Incoming ACH transactions



If any of these fields are set to Yes, that type of transaction initiated by this employee would require additional approval before that transaction is finalized.

Fund Transfer Options	
Inquire Transfers:	No
Initiate Transfers:	No
Review Bill Payment Transfers:	No

Inquire Transfers – If set to yes, this employee will have the ability to inquire into fund transfer templates already established. This employee will only have access to the templates you assign them access to.
Initiate Transfers - If set to yes, this employee will have the ability to initiate fund transfers.

Electronic Documents

Enable All	Document	Enable All	Document
✓	DDA ONUS DEBITS		Checking Notices
✓	DDA ONUS CREDITS		Savings Account Notices
✓	SAV ONUS DEBITS		COD Account Notices
✓	SAV ONUS CREDITS		Loan Account Notices
	Checking Account Statements		Loan Account Statements
	Savings Account Statements		Ready Check Notices

Select the documents you would like this employee to view through e-Corp. If you enrolled in e-Statements you would want to select the first 8 check boxes.

Employee Account Access

Add	Account Number	Account Type	Account Nickname
Select All			

Select the accounts that you would like this employee to have access to.

Applications Enabled

Select None

✓ ACH

If this employee will have the ability to initiate ACH Transfers, check the box and click Next.

On the next screen click Finish.