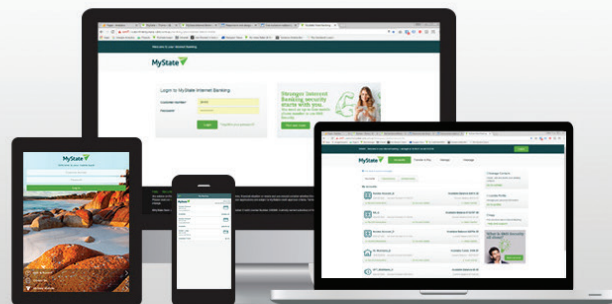


Internet Banking Guide

Delegated Users



This function gives you the ability to add additional users to your Business Internet Banking account. It also enables you to determine which features and accounts that user can access. You can manage delegated users from the main menu, Manage > Delegated Users

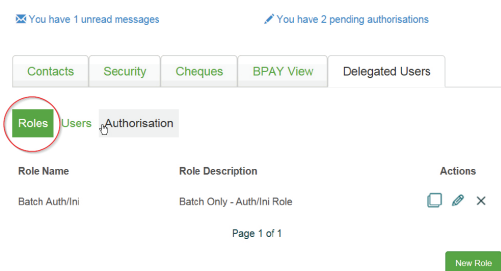
Roles

Access levels for delegated users can be assigned through the Role Screen. Under the Delegated Users Tab, click 'New Role'.

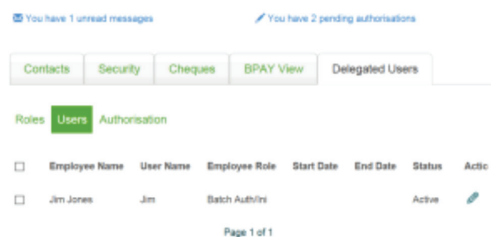
Generating Roles enables the creation and maintenance of each delegated user's roles. This determines which accounts the user can access and the tasks that they can perform on those accounts.

The Role Management screen is divided into four sections:

Role: used to enter a Role Name, Description, manage a role's access to business accounts and define limits for various transaction types.



Users: used to assign user to roles, start date, end date and status



Authorisation: This screen is used to authorise creation of new delegated users where your organisation requires multiple signatures to approve this change.

Role Name*

Role Description*

Transaction Account	Batches	BPAY	Internal	External	Transactions
Access Account -	<input type="text" value="Auth"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
Everyday Business	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
Term Deposit Account -	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>

Once created, the roles are assigned to the appropriate delegated user who will inherit the permissions set for that role. A new role will need to be created for any delegated user requiring a different set of permissions.

	Transaction Limits*	Daily Limits*
BPAY	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
External	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Internal	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Member To Member	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Batches	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
NPP Payment	<input type="text" value="1000000000.00"/>	<input type="text" value="1000000000.00"/>

Limits are enforced at the role level—for example, if two users share the same role, they also share the same limit.

You can use existing roles as templates for new roles by selecting the Copy options. The copied role will contain the permissions from the original role and can be edited to meet the requirements of the new role.

	Transaction Limits*	Daily Limits*
BPAY	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
External	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Internal	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Member To Member	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
Batches	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>
NPP Payment	<input type="text" value="1000000000.00"/>	<input type="text" value="1000000000.00"/>

Delegated user access types

There are a number of access types for delegated users. You can choose one, all or a combination of these access types for each delegated user:

- Can upload payment files: allows delegated users to upload payment files
- Can Create Payees: allows delegated users to create, edit, delete and use Payees.
- Can Create Billers: allows delegated users to create, edit, delete, and use Billers.
- Can Create Ad Hoc Payments: allows delegated users to make ad hoc payments (i.e. not use an existing payee to make a payment).*
- Can Select From Biller List: allows delegated users to select billers from the Billers list when using the BPAY option.*

*One of these options must be selected to enable a delegated user to create new BPAY billers and modify existing billers.

Define role access

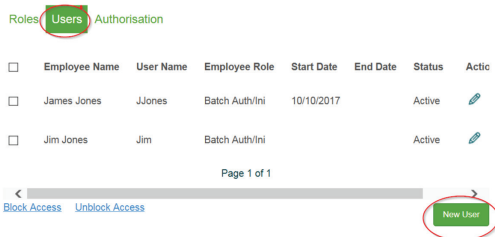
- Can upload payment files
- Can Create Payees
- Can Create Billers
- Can Create Ad Hoc Payments
- Can Select From Biller List

Adding a new user

To add a new user click Manage > ‘Delegated Users’ under the main menu, then click ‘Add New User’. When adding a new user, you will be prompted for the following information:

Employees: first name, last name, user name, password, employee role, start date (optional), end date (optional), start time (optional), end time (optional), weekend access (optional). The new user will not be able to log in until MyState has activated their account.

The new user will need to visit a MyState Branch and provide identification, (as required by AML/ CTF legislation) and the activation form signed by the account owner. Once activated, they can begin viewing and transacting on nominated accounts.



Create user

First Name:

Last Name:

Username*:

Password*:

Role*:

Start Date:

End Date:

Start Login Time:

End Login Time:

Weekend Access:

Buttons: Cancel Create User

Manage Users Screen







The Manage Users screen provides the option to create, maintain and delete delegated users and their access. You can use the Edit, Delete or Block actions to the right of the screen or you may wish to select multiple delegated users and block or unblock them as required.

MyState Accounts Transfer & Pay **Manage** Message

You have 1 unread messages You have 2 pending authorisations

Contacts Security Cheques BPAY View Delegated Users

Roles **Users** Authorisation

<input type="checkbox"/>	Employee Name	User Name	Employee Role	Start Date	End Date	Status	Actions
<input type="checkbox"/>	James Jones	J.Jones	Batch Auth'n	10/10/2017		Active	  
<input type="checkbox"/>	Jim Jones	Jim	Batch Auth'n			Active	  

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[Block Access](#) [Unblock Access](#) **New User**