



Copy a User

For security purposes, the User ID, Name, Telephone, and Password information is not copied.

If Secure Token is enabled, a token device will be requested for the user once the setup is completed and saved. The user will not be able to sign on to Internet Banking until they receive their token device. You can monitor the status of the request by checking for a fulfillment date on the user's profile page. When that date appears, it indicates the financial organization has processed the request and is sending the token device on the date indicated.

1. Click **Administration > Company Administration > Manage users**.
2. Click **Create new user**.
3. Complete the **User Information** and **User Telephone Number** fields and then click **Continue**:

User ID	A unique user identification number that is at least four alphanumeric characters but no more than 26. Spaces and special characters are not supported.
Password	A temporary password the user only uses once at their first sign-on. The password must be at least eight characters but no more than 12 and include two of the following character types: letters (a-z or A-Z), numbers (0-9), or special characters (# \$ @).
Confirm password	The password typed into the Password field.
First name	The user's first name (up to 80 alphanumeric characters).
Last name	The user's last name (up to 80 alphanumeric characters).
Primary e-mail address	The user's main e-mail address (up to 100 alphanumeric characters).
Secondary e-mail address (optional)	The user's back-up e-mail address (up to 100 alphanumeric characters).
Additional information (optional)	Descriptive text about the user (up to 30 alphanumeric characters).
Label	Work, Work 1, Mobile, Mobile 1, Home, and Other. Each label can be used once, for a maximum of six phone numbers. At least one telephone number is required.
Country/region	Used for the numeric country code associated with the telephone number. Select from a listing of country names, which are mapped to the appropriate one to three-digit country code.
Area/city code and local number	The telephone number separated by the one of the following characters: left and right parentheses, hyphen, period, or spaces. Up to 30 characters (digits and separator characters) are allowed.



<p>Extension (optional)</p>	<p>Required when an extension is needed to reach the user within an office phone system. Up to 16 numeric characters are allowed.</p> <p>Some phone systems require entry of additional characters, often referred to as control codes, to reach an extension. The following control codes are allowed:</p> <ul style="list-style-type: none"> ○ Pound (#) ○ Star (*) ○ Comma (short pause - approximately 2 seconds) ○ Period (long pause - approximately 5 seconds) <p>Multiple comma and period characters can be placed before or after an extension to add pause time during system generated calls that are made to users for the purpose of validating their information.</p> <p>For example, ..12345. This example extension has a 10 second pause time before the extension and a 5 second pause time after. During a system generated call, the system waits 10 seconds before dialing the extension and waits 5 seconds after it dials before playing an affirmation message such as "Hello. This is Example Company. Please press 1 to...".</p>
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4. Select the user to copy:
 1. Click **Copy user** and then click the **Select user** link.
 2. Click the **User ID** of the user you want to copy and then click **Copy user**.
 3. Click **Continue**.
5. Click **Continue**.
6. If applicable, change the ACH, wire, and/or bill payment limits:
 0. If applicable, change the following ACH limits and then click **Continue**:

User daily limit	The maximum allowable cumulative amount of all successful transactions in a given day for a group of ACH services.
User Daily Service Limit	The maximum allowable cumulative amount of all successful transactions in a given day for a particular ACH service.
User Daily Account Limit	The maximum allowable cumulative amount of all successful ACH transactions on a per account basis in a given day.



1. If applicable, change the following wire limits and then click **Continue**:

User daily limit	The maximum allowable cumulative amount of all successful transactions in a given day for a group of wire services.
User Daily Service Limit	The maximum allowable cumulative amount of all successful transactions in a given day for a particular wire service.
User Daily Account Limit	The maximum allowable cumulative amount of all successful transactions on a per account basis in a given day.
User Individual Transaction Limit	The maximum allowable amount for each transaction for a particular account. .

2. If applicable, change the following bill payment limits and then click **Continue**:

User transaction limit	The maximum allowable amount a company user can enter for a bill payment transaction.
User transaction approval limit	The maximum allowable amount a company user can approve for a bill payment transaction.

3. **Note:** *Users given the Administration role automatically inherit the company's transaction limits. In this instance the limits cannot be changed.*
7. If the enabled services do not have limits, click **Continue**.
8. Verify the user's profile as needed and then click **Submit**.

For companies that do not require multiple approvals for Administration, clicking **Submit** creates and activates the user. For companies that require multiple approvals for Administration, clicking **Submit** submits the user profile for approval by other Administrators in the company.