

# U.S. Bank Access® Online

## User Profile Setup and Maintenance

### Overview

Within U.S. Bank Access® Online, a user profile provides a client with the ability to log into and use the system. . With User Profile Setup and Maintenance, program administrators have the opportunity to create and manage user profiles. The user profile consists of user login information (user ID and password), as well as system access rights which dictate the specify accounts a user can access and the tasks he/she can perform.

By leveraging User Profile Setup and Maintenance, clients gain the ability to:

- Control user setup and maintenance activities
- Obtain immediate access to set up new and edit existing user profiles
- Manage users based on the organization's policies and priorities
- Expedite the setup and maintenance process giving cardholders quicker access to the organization's payment solutions

### How It Works

The Access Online *User Profile Setup* function intuitively leads program administrators through the setup process in four simple steps.

**Step One** — Assign user login information including: user ID, password, authentication question and functional entitlement group (FEG). A FEG is a set of available tasks and functions assigned to select group of cardholders. FEGs determine what functionality the cardholder has access and visibility to within in Access Online.

**Step Two** — Designate each account a cardholder can access.

**Step Three** — Specify user hierarchy assignments. Processing hierarchy controls how transactions are handled for billing and accounting purposes. Reporting hierarchy is customized for each organization's reporting needs and allows for the data to be accurately provided.

**Step Four** — Enter user contact information, including address and e-mail, for prompt notification of statements and/or pending transaction approval actions.

A series of management reports are available to support program administrators during the setup and maintenance of user profiles. These reports include:

- System User List
- System User List Detail
- System User List Detail Across Organizations
- System User List Summary

Once a user profile is created, program administrators can update the user ID, password, hierarchy assignment, account assignment and FEG at any time. This functionality may be used to:

- Unlock passwords after three invalid log in attempts, no longer requiring help desk assistance
- Inactivate a user ID for someone on temporary medical leave
- Remove a user ID for someone who left the organization

In addition, cardholders can also conveniently modify their own personal information within the Access Online on demand.

### **For More Information**

To find out more about the U.S. Bank Access Online User Profile Setup and Maintenance functionality, please contact your U.S. Bank Account Coordinator or Relationship Manager/Account Manager.