Creating a User Role

The User Roles page contains a list of User Roles. You can create (Create Role) a new role or copy ( )an existing role.

To create a User Role

1. In the navigation menu, click Commercial > User Roles.
2. Click Create Role.
3. Enter a Role Name.
4. (Optional) Enter a Description.
5. Click Continue.
6. On the Overview tab, click the name of the Transaction Type for which you are creating an action. The Allowed Actions tab for the selected Transaction Type appears with the current restrictions.
7. Create additional actions by clicking or tapping Add New Allowed Action. The Policy Rules page for the selected Transaction Type appears.
8. Add the action by editing the following:
    - Operation: Draft, Draft Restricted, Approve, or Cancel.
    - Amount: Enter an operation amount. You can select Any for any amount.
    - Subsidiaries
    - Accounts
    - Draft Hours
    - SEC Codes: PPD, CCD, TEL, and/or WEB.
9. Click the Features tab to see a list of features.
10. Click the desired Feature. The feature categories will vary depending on your configuration and may include:
    - Rights
    - Corporate
11. Click the Accounts tab to see a list of accounts.
12. Edit one or more of the following access rights by clicking or tapping Allow ( ) or Deny ( ):
    a. View: View balances and history for the account on the Home page, on the Account Details page, and in reports.
    b. Deposit: Deposit funds into the account. This is applicable to the ACH Receipt and ACH Collections Transaction Types.
    c. Withdraw: Withdraw funds from the account. This is applicable to the ACH Single Payment, ACH Payments, Payroll, Domestic Wire, International Wire, and Tax Payment Transaction Types.
13. Click Save. The Policy Saved page appears confirming the changes.
14. Click Close.

Editing User Role Transaction Type actions

You can edit how a User Role interacts with a Transaction Type by editing Allowed Actions. Editing each Transaction Type's actions is especially useful if a role needs varying degrees of control for different Transaction Types.

To edit a User Role's Transaction Types

1. In the navigation menu, click Commercial > User Roles.
2. Click the edit icon ( ) for the desired User Role. The selected User Role page appears.
3. See steps 6-14 above.

Deleting a User Role

When the User Role is deleted, the user will move into an unassigned role status and won't have access to accounts.

Caution: Deletion is permanent, so use caution before deleting a User Role.

To delete a User Role

1. In the navigation menu, click Commercial > User Roles.
2. Click the delete icon ( ).
3. Click Delete to confirm deletion.
4. Click Close. The User Role page appears.