

RDC ADMINISTRATOR GUIDE

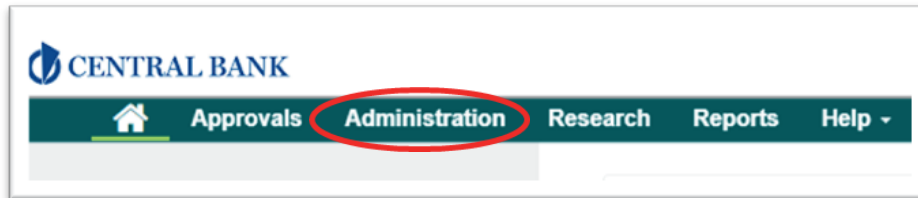
STEP-BY-STEP GUIDE ON HOW TO ADD AND MODIFY SUB-USERS



Adding a New User

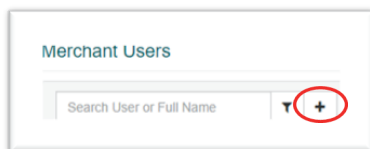
The User Administration function enables you to add new, edit existing users or remove users.

To access the administration options, select **Administration** from the navigation bar.



Add a New User

- Select **Administration** to access the User Administration page.
- In the left page, select the + icon

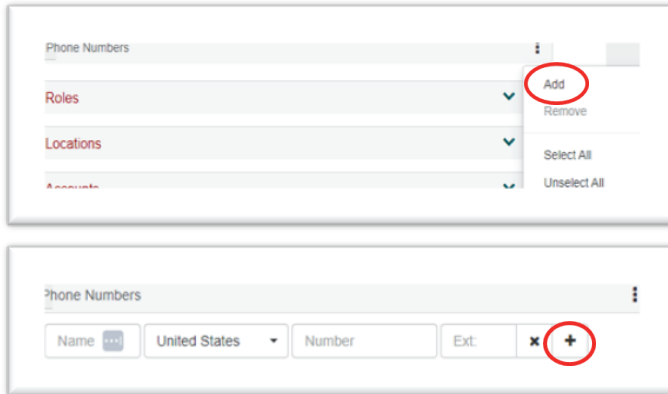


- **User** = enter the logon ID for the user
 - Note: If the customer has access to Online Banking, you will want to use the same user ID
- **Full Name** = enter the full name of the user
- **Email** = enter the email address for the user.
 - Note: The email is used for password resets and other system emails
- **Timezone** = CST
- **Date Format** = Leave as Default
- **Time Format** = Leave as Default
- **Scanner** = select the scanner the user will be using

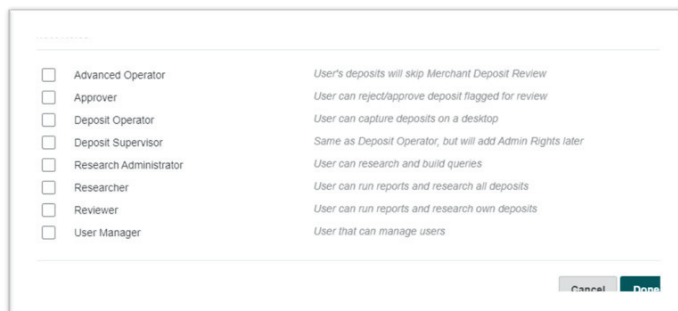
A screenshot of the user creation form. It contains several input fields: 'User' (text), 'Full Name' (text, with a red error message below it stating 'The full name is required and can not be the same as the user name'), 'Email' (text), 'Timezone' (dropdown menu with 'Select a Timezone' selected), 'Date Format' (dropdown menu with 'M/D/YYYY' selected), 'Time Format' (dropdown menu with 'h:mm:ss tt' selected), and 'Scanner' (dropdown menu with 'Select a Scanner' selected). Each field has a red border and a small 'x' icon in the top right corner.

Adding a New User

- **Phone Number** = User's Phone Number
 - Click on the three dots and select Add to enter the phone number
 - After entering the name and number hit the plus (+) sign.



- **Roles** = Assign Permissions to the User
 - Click on the three dots to select the user roles
 - If the user will be scanning & submitting deposits assign roles for Deposit Operator & Research Administrator (which will allow them to research previously submitted deposits).
 - If the user will be managing users, then assign the User Manager role.
 - After selecting all user permissions select **Done**.



- **Locations** = Assign the Location
 - Click on the three dots to select the user location
 - After selecting the location select **Done**.
- **Accounts** = Assign all accounts the user needs
 - Click on the three dots to select accounts
 - After selecting all accounts needed select **Done**.
- Press **Save**
- The system will automatically send an email to the new user containing a link to establish a password.
 - If the user also has access to online banking, they can disregard the email. Email TreasuryManagement@cbhou.com with the new user's name and user ID to ensure their SSO is established. After the SSO setup is complete, the user will be able to access the Remote Capture site through online banking by clicking on the Commercial menu and DLM Remote Deposit.

Adding a New User

- If the new user will be logging in through the DLM Remote Capture website, they will follow the instructions in the email to establish their password. For future logins, they will use the following link: [DirectLink Merchant \(fisglobal.com\)](https://DirectLinkMerchant(fisglobal.com))

Once users have been added to the system, you can work with them in the following ways:

- Edit user profiles to update user information or assign different roles, locations or accounts
- Disable users or make locked out users active again
- Reset User Passwords – this will send an email notification containing a link for the user to reset the password
- Remove Users

Access to the complete Remote Deposit User Guide can be found here: [Remote Deposit User Guide](#).